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1   Service Documentation

1.1   Service Documentation Wizard Setup

To log services for students, select the appropriate logging wizard from the "Wizards" tab.
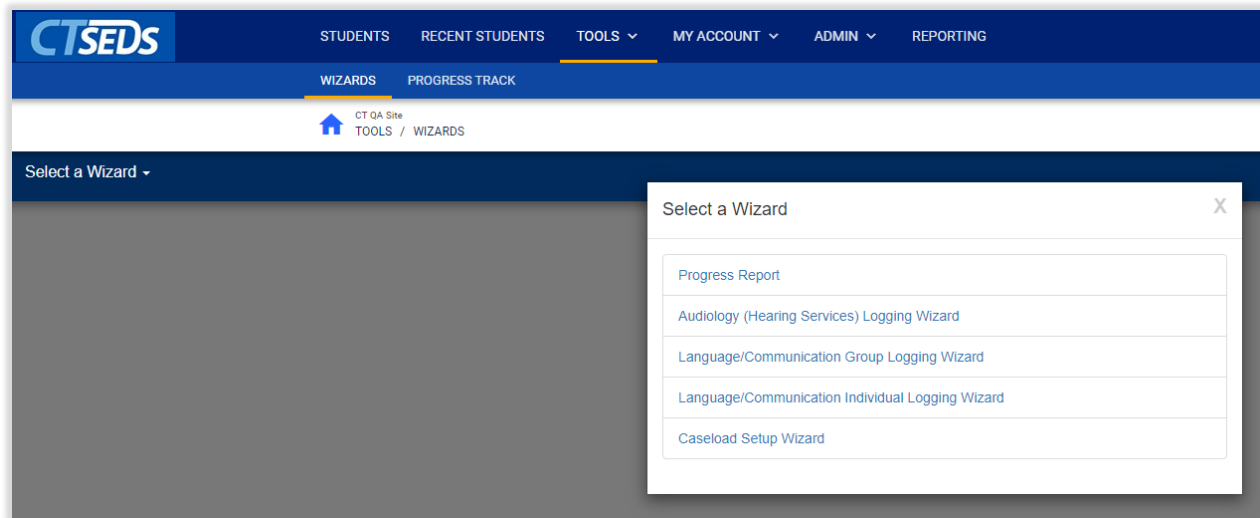

Figure 1: Selecting the Appropriate Wizard

On the next screen the user will see a listing of the students on their caseload with services available for logging. Select a student to document for by clicking the check mark next to the student's name. The check mark will turn green when the student is selected. The gray information icons can be used to view applicable service information for the student.
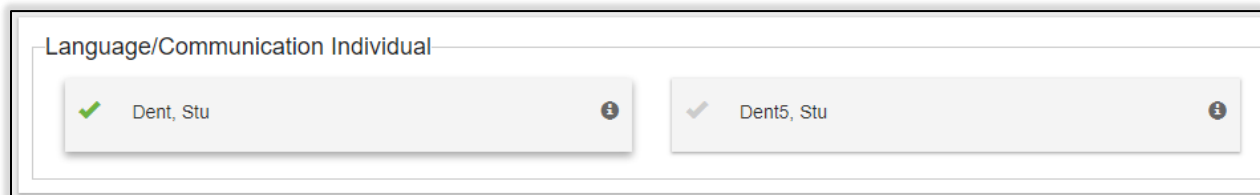

Figure 2: Caseload View

The user can filter their caseload to help identify which students the user wants to document for (i.e. by school).
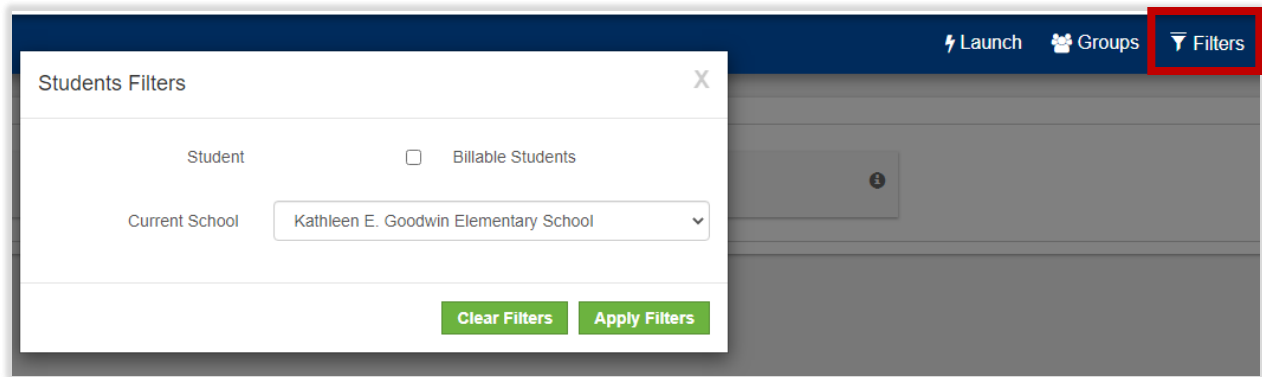
Figure 3: Caseload Filters

Groups can be created within the Logging Wizards for easy selection of the same students. To set up a group, select more than one student after applying any sorts or filtering. The user will see another button appear next to the Filter button called "Groups". Click the button, then click "Create Group from Selected students". Name the group, then click Save to save the group of students. Groups can also be overwritten with new students, or deleted by clicking the Groups button. Once the user pre-built groups, the user can easily use the "Groups" button to easily select that group of students again and log services for that group together.

Once the user has selected the student(s) to document for, click the "Launch Wizard" button located at the bottom of the screen.
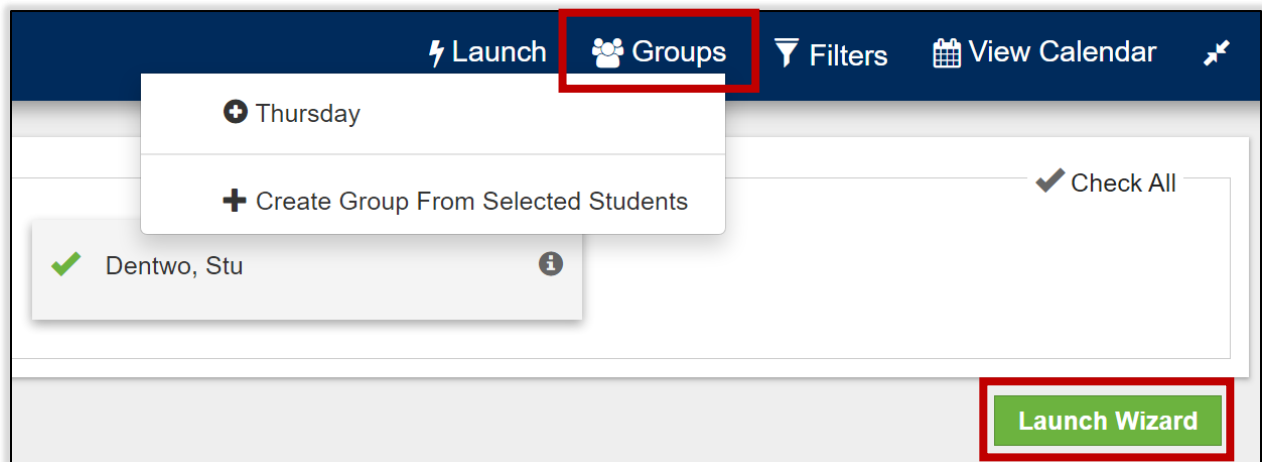

Figure 4: Caseload Groups

1.2   Service Documentation Logging Wizard

Service/Plan info about the students selected for documentation can be located next to their name on the left hand of the screen in the green navigation bar.
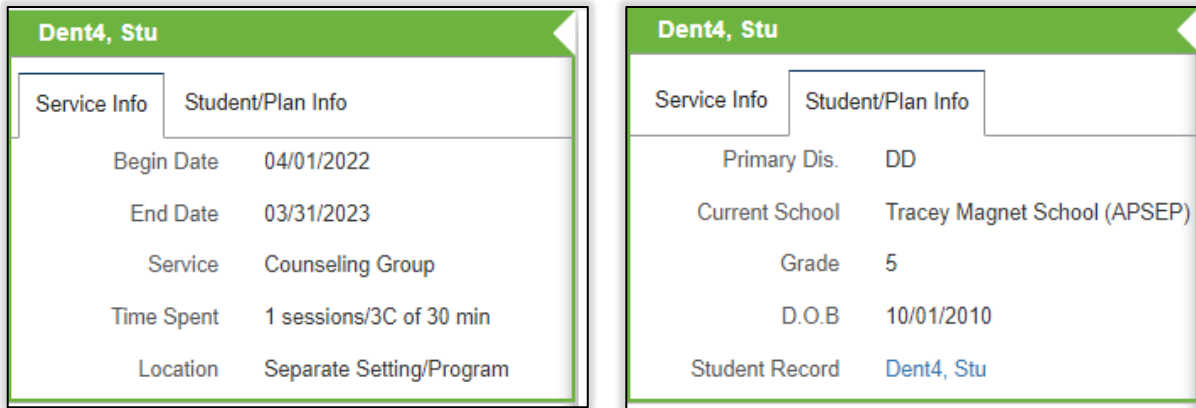
Figure 5: Student Service/Plan Information available in Wizard

Any previously logged sessions on this student by the user or another clinician will appear above the logging wizard in the Previous Log Entries section. Additionally, the user can filter for specific sessions and expand a session using the plus button to see additional information in this section.
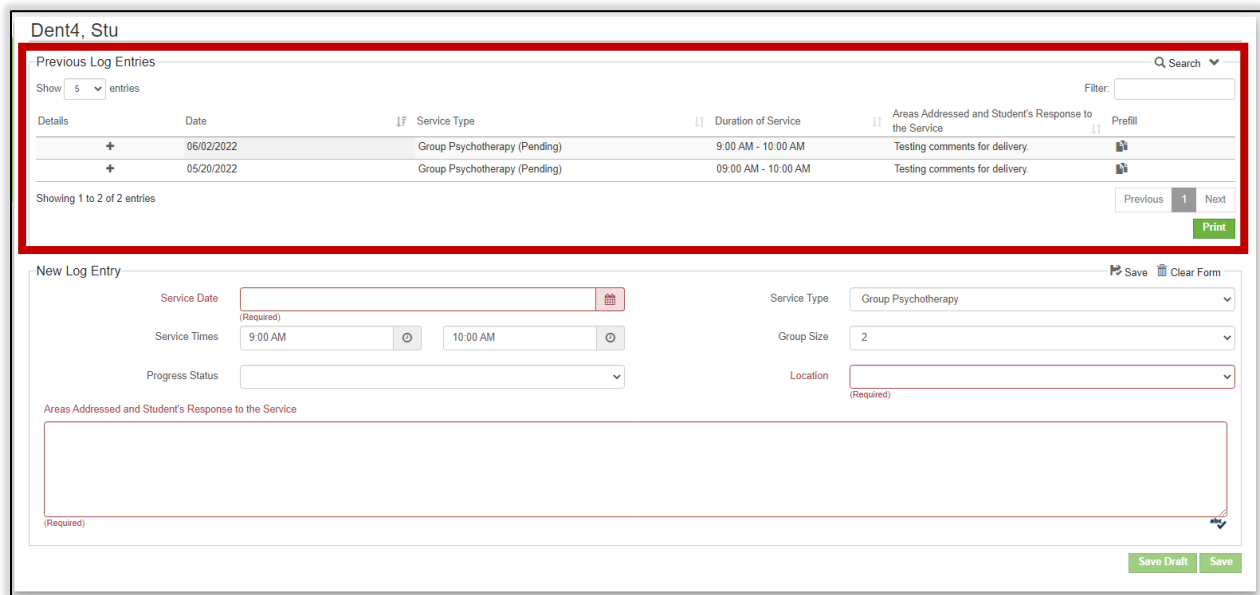

Figure 6: Previously Logged Entries in Wizard

Enter required information into the logging wizard. Date, service type, duration of service and location are required fields. Additional fields will appear in red with a required notation depending on the service type selected.
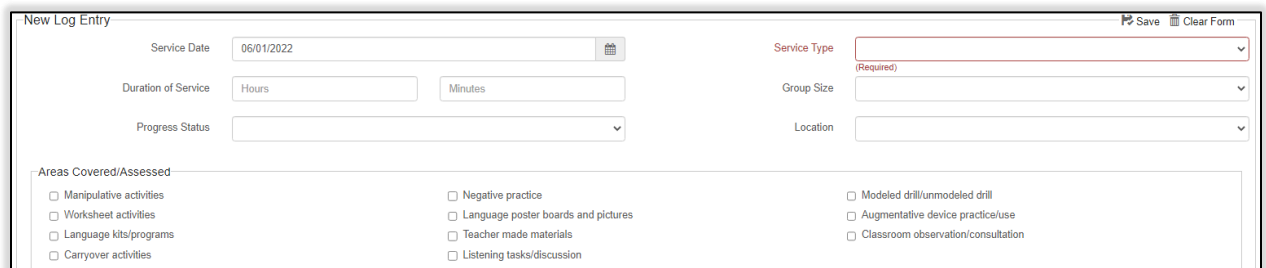

Figure 7: New Log Entries in Wizard

Enter service note information into the "Areas Addressed and Student's Responses to Service" section of the logging wizard. Spell check is available for the user to use under the comments text box.
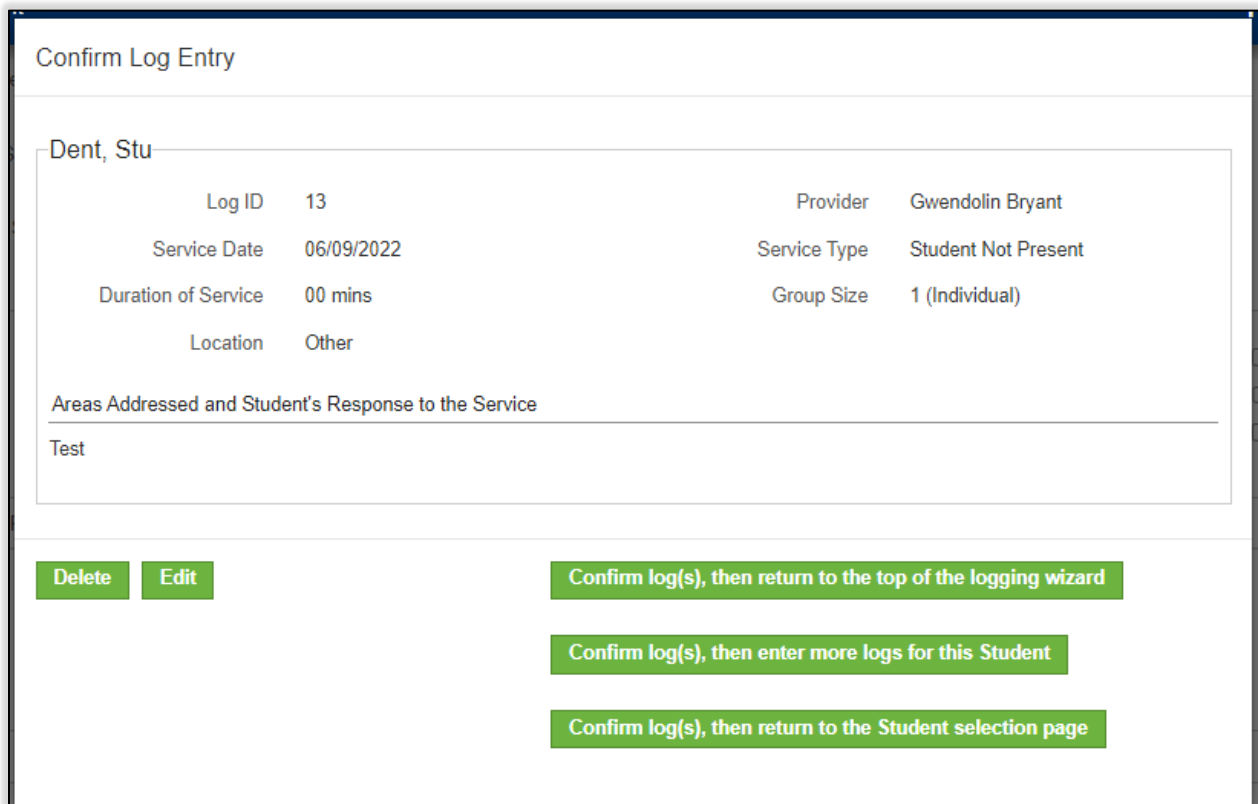

Areas Addressed and Student's Response to the Service

Figure 8: Areas Addressed and Student's Responses to Service in Wizard

Once the user is done entering service information for a student, click the "Save" button below the "Areas Addressed and Student's Responses to Service" box, or the user can continue to log for additional students on this screen if the user selected more than one student to document on. Once the user is done logging all services, click the "Save All" button at the bottom of the screen.

A confirmation message will display asking the user to confirm the information entered. The user has the option to delete the note, edit the note, confirm the note and return to the top of the logging wizard, confirm the log and enter more logs for the student the user is working on, or confirm the logs and return to the student selection page.

Confirm Log Entry

Dent, Stu

Log ID	13	Provider	Gwendolin Bryant
Service Date	06/09/2022	Service Type	Student Not Present
Duration of Service	00 mins	Group Size	1 (Individual)
Location	Other		

Areas Addressed and Student's Response to the Service

Test

[Delete] [Edit]

[Confirm log(s), then return to the top of the logging wizard]

[Confirm log(s), then enter more logs for this Student]

[Confirm log(s), then return to the Student selection page]

Figure 9: Edit, Confirm or Log Additional Services Screen in Wizard

1.3 Service Documentation: Group Logging in Wizard

To document services using the Group Logging Wizard, click on the "Group Logging" button located at the top of the logging wizard.
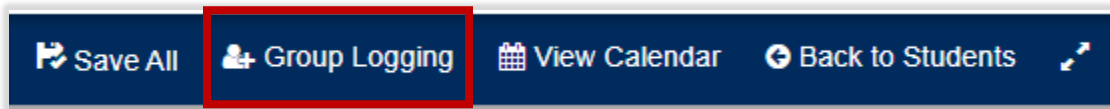

Figure 10: Group Logging in Wizard

A different pop up window will guide the user through a documentation screen where the user will enter service information that pertains to all students in the group session. Areas covered/assessed selections on this screen should be applicable to the entire group. When the user is finished, click the "Apply" button. The information the user entered pertaining to all students will be prepopulated in the logging wizard for the students selected. This information can be edited or changed at any time.

Figure 11: Group Logging Set up in Wizard

Next, enter individual information for each student in the group session, including service notes in the "Areas Addressed and Student's Responses to Service" box. When the user is done, click the "Save All" button located either at the very bottom of the screen, or in the blue menu bar.