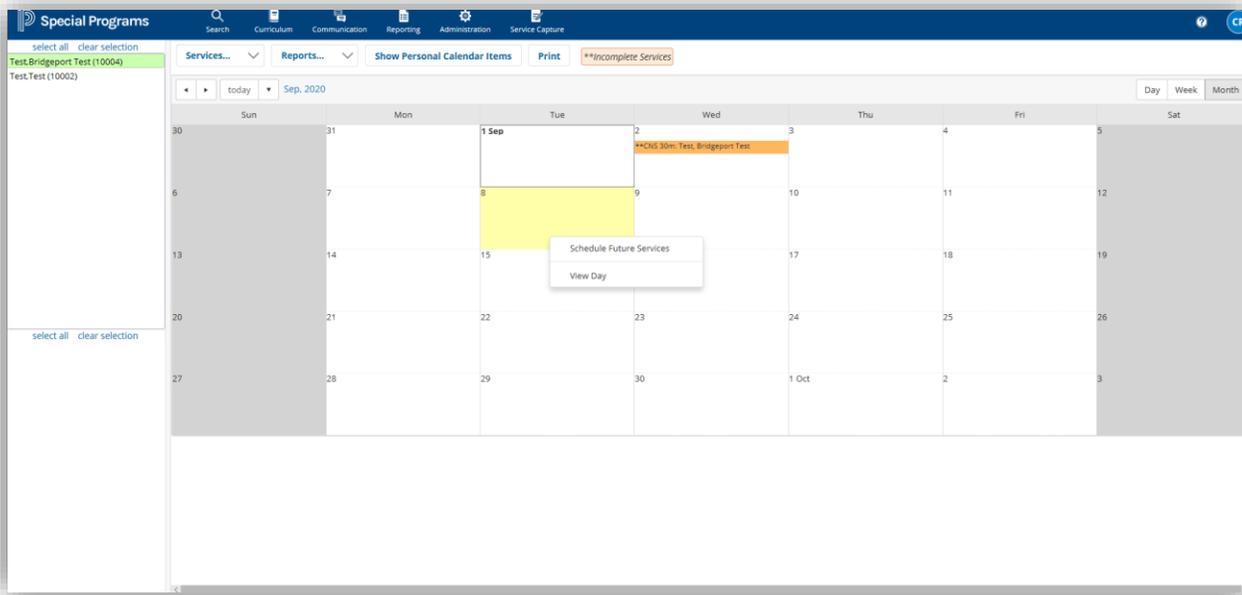


Entering Service Records Instructions in PS Special Programs

1. Click the “Calendar Icon”  , next to client’s name under “My Services”.
2. Select client, by highlighting their name on the left side of screen (If selecting multiple students hold Ctrl key to select/click multiple students).
3. Select a day on the calendar by right-clicking the specific date, then select “Schedule Future Services” (or “Schedule Past Services” for entering past services)



4. Complete the **Service Record** page by entering the date, time of appointment, type of Service, and Session Duration > click “Save.” This data will populate as a future appointment in your Service Calendar

Service Record

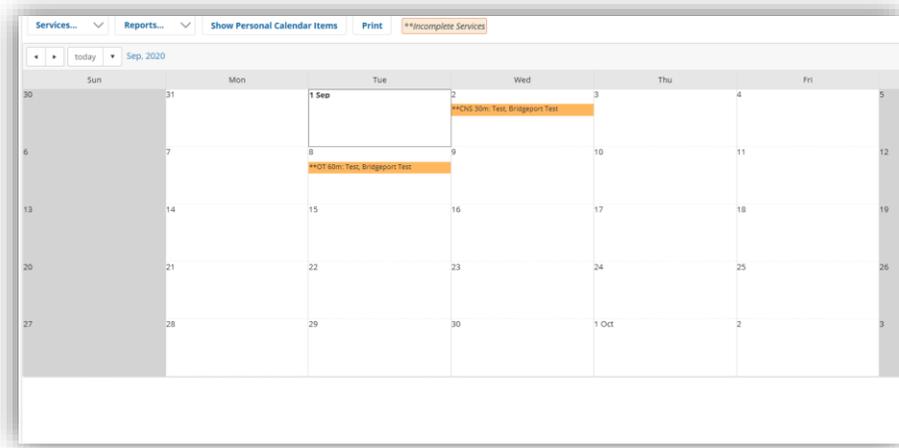
Student	Test, Bridgeport Test
Staff	Romillo, Claire
Service Date Time *	09/08/2020, 11:00 AM
Service *	Occupational Therapy
Duration Minutes	60
Session Size *	1
Service Setting *	School
Progress Notes/Comments	
Admin Approve	<input type="checkbox"/>

* Be sure to enter these key fields.

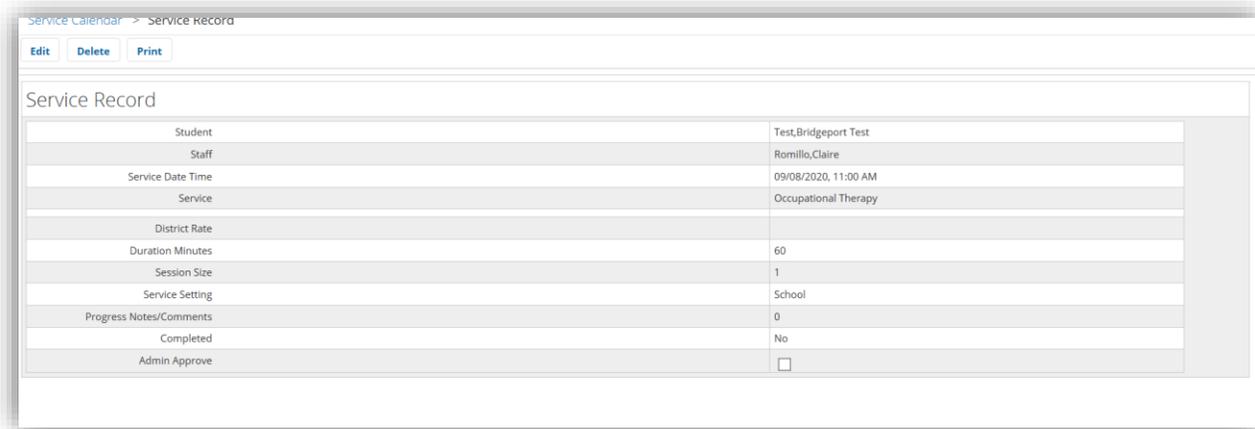
Additional weeks to repeat schedule: N/A

Save Cancel

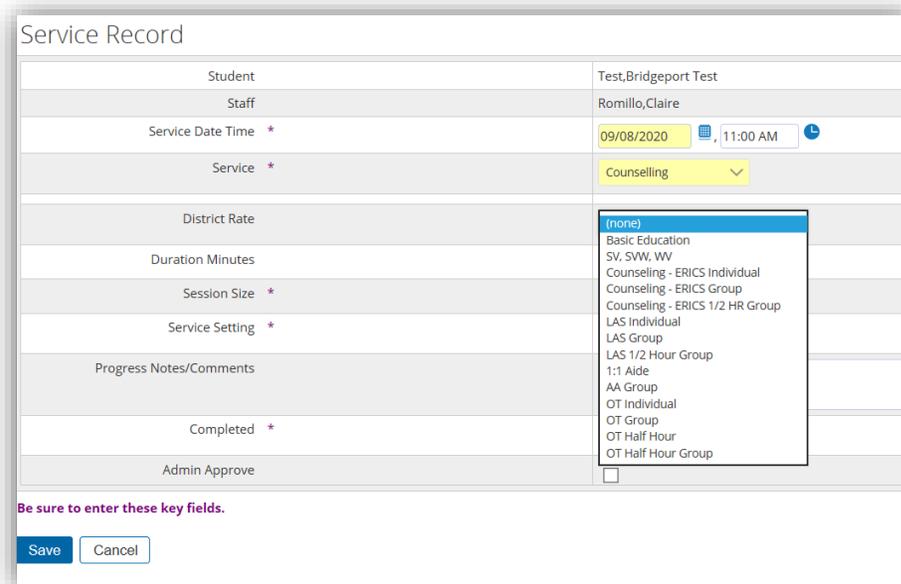
5. After the session is completed, click on the appointment listing in your Service Calendar



6. Click the “Edit” Button on the top left corner to open the Service Record:



7. Complete the Service Record, by selecting the “District Rate” (District Rate should reflect the specific service provided), entering the Progress Note, and changing “Completed” to Yes, > Click “Save”



8. Your Supervisor will now be able to approve this Completed Service by checking "Admin Approve"
9. Your Service Record is now complete.