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

Schedule Future Services:	
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 V
Progress Notes/Comments	
Admin Approve	
* Be sure to enter these key fields.	
Additional weeks to repeat schedule: HUA Save Cancel	

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

Sei	rvices V Reports	Show Personal Calenda	ar Items Print **Incomple	te Services			
•	► today ▼ Sep, 2020						
30	Sun	Mon 31	Tue 1 Sen	Wed	Thu	Fri	5
				**CNS 30m: Test, Bridgeport Test			
6	7	7	8	9	10	11	12
			- Or som, rest, progeport rest				
13		14	15	16	17	18	19
20		21	22	23	24	25	26
27		28	29	30	1 Oct	2	3

6. Click the **"Edit"** Button on the top left corner to open the **Service Record**:

Service Calendar -> Service Record	
Edit Delete Print	
Service Record	
Student	Test,Bridgeport Test
Staff	Romillo,Claire
Service Date Time	09/08/2020, 11:00 AM
Service	Occupational Therapy
District Rate	
Duration Minutes	60
Session Size	1
Service Setting	School
Progress Notes/Comments	0
Completed	No
Admin Approve	

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"**

Student		Test,Bridgeport Test	
Staff		Romillo,Claire	
Service Date Time	*	09/08/2020 🕮 , 11:00 AM 🕒	
Service	*	Counselling 🗸	
District Rate		(none) Basic Education	
Duration Minutes		SV, SVW, WV	
Session Size	*	Counseling - ERICS Individual Counseling - ERICS Group Counseling - ERICS 1/2 HR Group LAS Individual LAS Group	
Service Setting	*		
Progress Notes/Comments		LAS 1/2 Hour Group 1:1 Aide AA Group OT Individual	
Completed	*	OT Group OT Half Hour OT Half Hour Group	
Admin Approve			

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