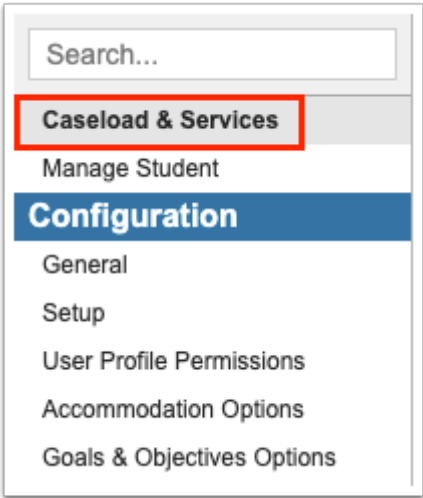


# Caseload & Services

The Caseload & Services screen allows teachers and service providers to document the services, accommodations, and modifications they provide to students.

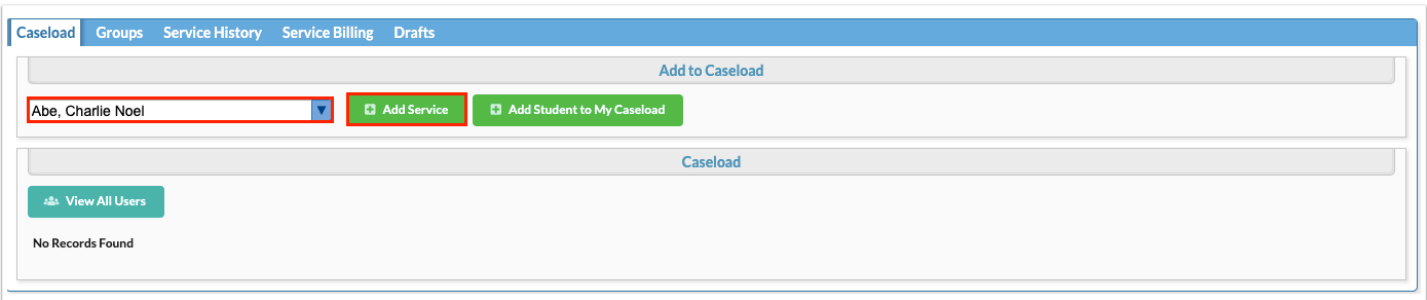
## Adding a Service to an Individual Student

1. In the **SSS** menu, click **Caseload & Services**.



The Caseload tab is automatically displayed.

2. Select the student in the pull-down and click **Add Service**.



3. In the pop-up window, select **This student was absent on this day** if the student did not receive their scheduled service due to an absence.

4. Select the **Service Date**. If left blank, the Service Date will default to the date this form is submitted.

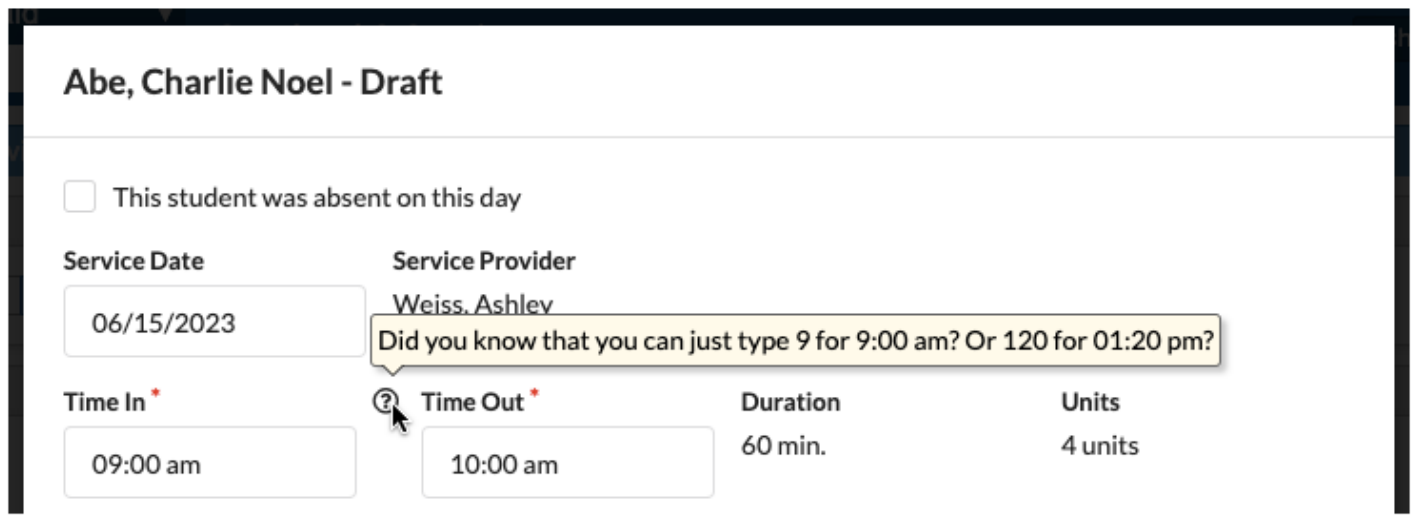
 The Service Provider is auto-populated with your name.

**5. Enter the Time In and Time Out for the service.**

The Duration will auto-calculate. The Units will also auto-calculate based on the duration.

- 8-22 min: 1 Unit
- 23-37 min: 2 Units
- 38-52 min: 3 Units
- 53-67 min : 4 Units
- 68-82 min: 5 Units
- 83-97 min: 6 Units
- 98-112 min: 7 Units
- 113-127 min: 8 Units, etc.

 Hover over the ? icon to view a tool-tip on shortcuts for entering the time.




**Abe, Charlie Noel - Draft**

☐ This student was absent on this day

Service Date	Service Provider	Time In *	Time Out *	Duration	Units
06/15/2023	Weiss, Ashlev	09:00 am	10:00 am	60 min.	4 units

Did you know that you can just type 9 for 9:00 am? Or 120 for 01:20 pm?

 When the system preference "Hide Time In, Time Out, and Duration on Caseloads & Services screen" is enabled, the Time In, Time Out, and Duration fields do not display. The Units field becomes a pull-down where you can select the units, 0.5 - 45.

**6. Select the Provider Role.**

The provider roles available in the pull-down are set up in SSS > Setup > [Providers](#) tab.

**7. Select the Service.** One or multiple services can be selected.

The services available in the pull-down are driven by the provider role selected. The services allowed for the provider role are set up in SSS > Setup > [Services](#) tab.

In addition, only services set as "Individual Service only" or "Both (Individual & Group Service)" in SSS > Setup > [Services](#) tab are available for selection.

8. If the student has an active IEP, select the **IEP Goal** from the student's goals, if applicable.

The goals from the student's current locked IEP, addendum IEP, EP, or SP are available for selection.

9. If the service is not for one of the student's IEP goals, you can optionally indicate the goal of the service in the **Additional Goals** text box.



The screenshot shows a form with four sections. The first section, 'Provider Role', has a dropdown menu with 'Reading Coach' selected. The second section, 'Service', has a dropdown menu with 'Assignment/test administered in alternate location' selected. The third section, 'IEP Goal', has a dropdown menu with 'N/A' selected. The fourth section, 'Additional Goals', is a large empty text box.

10. Optionally enter any **Notes**, if needed.



11. To upload any supporting documentation, click and drag a file from your computer into the **Additional Documentation** section of the screen, or click **Choose a file** and select the file from your computer.


**Notes**

**Additional Documentation**

docx

Abe.docx



 **Choose a file or drag it here**



**12.** To save the service record as a draft, click **Save as Draft**. The record will then be placed in the Drafts tab for submission at a later time.


**13.** To submit the service record, click **Submit**.

**Additional Documentation**

docx

Abe.docx

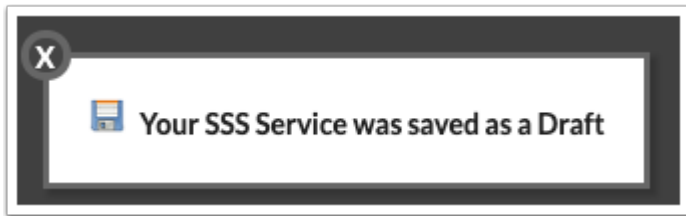


 **Choose a file or drag it here**

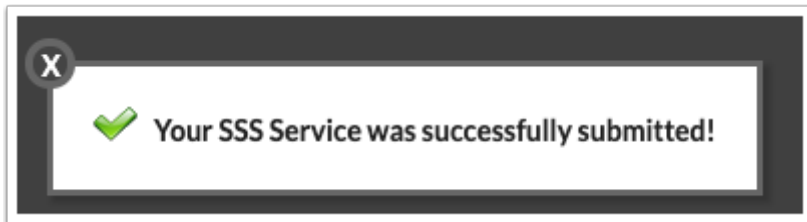
Cancel

Save as Draft or Submit

After saving the service record as a draft, a pop-up will display indicating the service was saved.



After submitting the service record, a pop-up will display indicating the service was successfully submitted.



- i If the service must be approved according to the [SSS Services approval flow](#), the pop-up will state "Your SSS Service was successfully submitted for approval!" In the [Service History](#) tab, the Status column will display as Pending, Approved, Denied, or Sent Back.

**14.** Click the **X** to close the pop-up.

## Adding a Student to Your Caseload

You can add a student to your caseload to more quickly and easily add services to the student. Once a student is in your caseload, you can also add the student to a group, access a saved draft service record, and create a template for a recurring service.

- i Deleting a student from your caseload also deletes the students from any of your groups.

**1.** In the Caseload tab, select the student in the pull-down and click **Add Student to My Caseload**.

Top navigation bar: Caseload, Groups, Service History, Service Billing, Drafts

Search bar: Acosta, Harry P

Buttons: Add Service, Add Student to My Caseload

Caseload section: View All Users

No Records Found

The student is added to the Caseload section at the bottom of the screen. If the student has received services previously, the last serviced date, time, and user who gave the service will display in the Last Serviced column. From your caseload, you can add the student to a group, add a service to that student, access a saved draft service record, and create a template for a recurring service.

2. Click the student's name to open the Manage Student screen for that student.

Top navigation bar: Caseload, Groups, Service History, Service Billing, Drafts

Search bar: Abe, Charlie Noel

Buttons: Add Service, Add Student to My Caseload

Caseload section: View All Users

1 Records

Student Name	Student ID	School	Last Serviced	User	Group(s)
Acosta, Harry P	00058780	Focus High School - 0041	No services on record	Weiss, Ashley	

Buttons: Add Service, Open Draft, Set Defaults

**i** If you have the "View All Users" profile permission for Caseload & Services, you can view the Caseload for all users at your school.

Top navigation bar: Caseload, Groups, Service History, Service Billing, Drafts

Search bar: Abe, Charlie Noel

Buttons: Add Service, Add Student to My Caseload

Caseload section: View All Users

1 Records

Student Name	Student ID	School	Last Serviced	User	Group(s)
Acosta, Harry P	00058780	Focus High School - 0041	No services on record	Weiss, Ashley	

Buttons: Add Service, Open Draft, Set Defaults

# Creating a Group and Setting Group Template Defaults

Creating a caseload group allows you to preselect a service code that is regularly provided to the same group of students. The service can then be mass added to the group of students.

1. Click the **Groups** tab.

The screenshot shows the 'Caseload Groups' interface. The 'Groups' tab is selected and highlighted with a red box. The table has columns for Title, Service Code, and Description. The Service Code dropdown is set to 'SSS01 - Administered test in small groups (details in Notes)'. The table is currently empty with 0 records.

- 2. In the blank row, enter a **Title** for the group.
- 3. Select the **Service Code** to be applied to the group.
- 4. If desired, enter a brief **Description** of the group or the service.
- 5. Press **Enter** to add the row to the table.

The screenshot shows the 'Caseload Groups' interface after adding a new group. The table now contains one record with the following details:

Title	Service Code	Description
ELA	SSS01 - Administered test in small groups (details in Notes)	Small group testing for ELA

6. Click **Set Group Defaults** next to the new group.

The screenshot shows the 'Caseload Groups' interface with the 'Set Group Defaults' button highlighted with a red box. The table contains one record with the following details:

Title	Service Code	Description
ELA	SSS01 - Administered test in small groups (details in Notes)	Small group testing for ELA

A pop-up window with a service record template is displayed. If the Service Date is left blank, it will default to the current date when the template is used and submitted.

ELA - Group Template Defaults				
Service Date	Service Provider			
<input type="text"/>	Weiss, Ashley			
Time In *	Time Out *	Duration	Units	
<input type="text"/>	<input type="text"/>	min.	0 units	

7. Enter the **Time In** and **Time Out** for the service.

The Duration will auto-calculate. The Units will also auto-calculate based on the duration.

- 8-22 min: 1 Unit
- 23-37 min: 2 Units
- 38-52 min: 3 Units
- 53-67 min : 4 Units
- 68-82 min: 5 Units
- 83-97 min: 6 Units
- 98-112 min: 7 Units
- 113-127 min: 8 Units, etc.



Hover over the ? icon to view a tool-tip on shortcuts for entering the time.

ELA - Group Template Defaults				
Service Date	Service Provider			
<input type="text"/>	Weiss, Ashley			
Time In *	Time Out *	Duration	Units	
10:30 am	11:30 am	60 min.	4 units	

- i** When the system preference "Hide Time In, Time Out, and Duration on Caseloads & Services screen" is enabled, the Time In, Time Out, and Duration fields do not display. The Units field becomes a pull-down where you can select the units, 0.5 - 45.



8. Select the **Provider Role**.

The provider roles available in the pull-down are set up in SSS > Setup > [Providers](#) tab.

9. Select the **Service**. One or multiple can be selected.

The services available in the pull-down are driven by the provider role selected. The services allowed for the provider role are set up in SSS > Setup > [Services](#) tab.

In addition, only services set as "Group Service only" or "Both (Individual & Group Service)" in SSS > Setup > [Services](#) tab are available for selection.

Provider Role \*

Reading Coach ▼

Service \*

Administered test in small groups (details in Notes) ▼

10. Optionally, enter a description of the group goal in the **Additional Goals** field.

Additional Goals

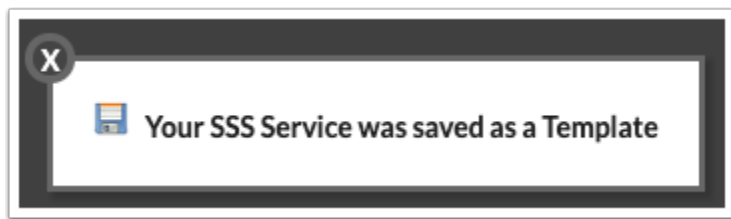
11. Optionally, enter any **Notes** relevant to the service or the group.

Notes

12. Click **Save as Template**.

Cancel Save as Template

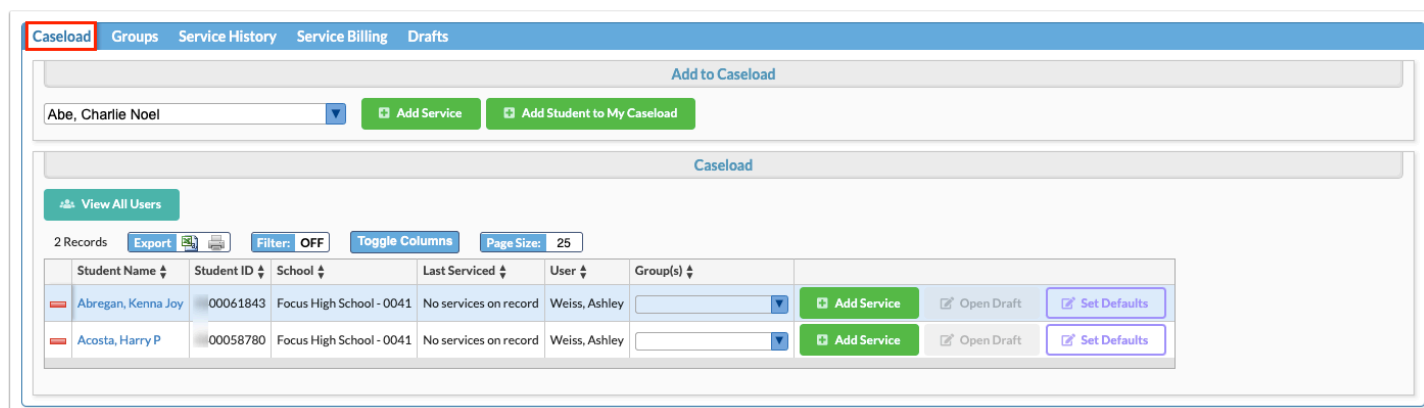
After submitting the template, a pop-up will display indicating the template was successfully saved.



13. Click the **X** to close the pop-up.

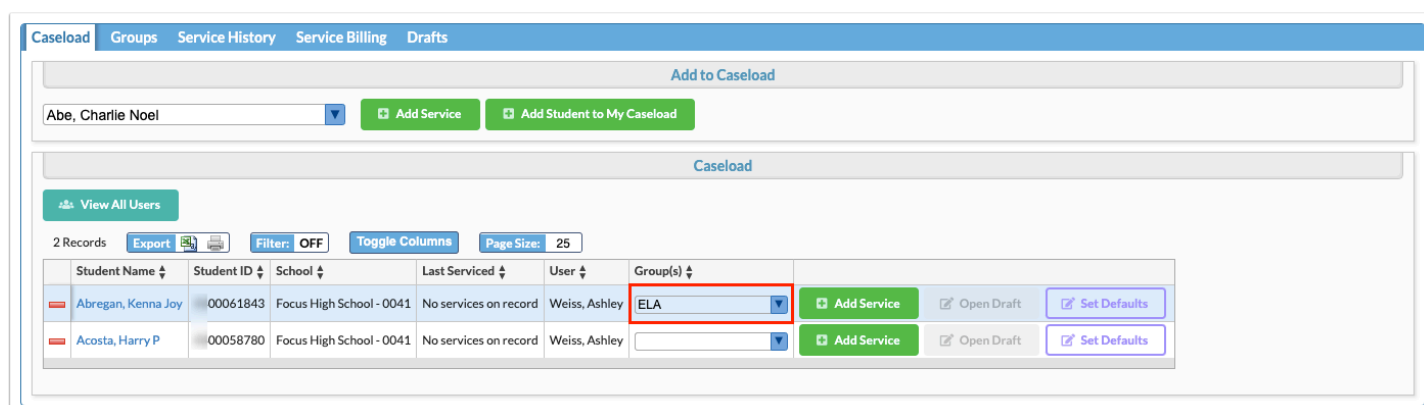
## Adding a Student to a Group

1. Click the **Caseload** tab.



2. In the Caseload section next to the student, select the **Group(s)** to assign to the student. One or multiple can be selected.

The groups are auto-saved.



# Mass Adding a Service to a Group of Students

1. Click the **Groups** tab.

The screenshot shows the 'Caseload Groups' interface. At the top, there are tabs: 'Caseload', 'Groups' (highlighted with a red box), 'Service History', 'Service Billing', and 'Drafts'. Below the tabs, there's a header 'Caseload Groups'. A toolbar contains '1 Records', 'Export' (with a download icon), 'Filter: OFF', 'Toggle Columns', and 'Page Size: 25'. The main table has columns: 'Title', 'Service Code', and 'Description'. The first row is 'ELA' with 'SSS01 - Administered test in small groups (details in Notes)' and 'Small group testing for ELA'. To the right of the table is a green button 'Add Group Service' and a link 'Open Group'.

2. Click **Add Group Service** next to the group.

This screenshot is identical to the previous one, but the 'Add Group Service' button is highlighted with a red box. Additionally, there are two more buttons to its right: 'Open Group Draft' and 'Set Group Defaults'.

In the pop-up window, the students in the group are listed along the left side. The Service Date, Time In, Time Out, Provider Role, and Service are auto-populated based on the template.

The screenshot shows a pop-up window titled 'ELA - Group Draft'. On the left, a list of students is shown: 'Abregan, Kenna Joy', 'Acosta, Harry P', and 'Aguilar, Emily Dickinson'. On the right, there are several fields: a checkbox 'This student was absent from group on this day', 'Service Date' (empty), 'Service Provider' (Weiss, Ashley), 'Time In' (10:30 am), 'Time Out' (11:30 am), 'Duration' (min.), 'Units' (3.5 units), 'Provider Role' (Reading Coach), 'Service' (Administered test in small groups (details in Notes)), 'IEP Goal' (N/A), and 'Additional Goals' (empty text area). At the bottom is a 'Notes' section with an empty text area.

3. For the first student in the list, select **This student was absent from group on this day** if the student did not receive their scheduled service due to an absence.

ELA - Group Draft

Abregan, Kenna Joy

Acosta, Harry P

Aguilar, Emily Dickinson

☐ This student was absent from group on this day

Service Date

Service Provider

Weiss, Ashley

Time In \*

10:30 am

Time Out \*

11:30 am

Duration

min.

Units

3.5 units

Provider Role \*

Reading Coach

Service \*

Administered test in small groups (details in Notes)

4. Select the **Service Date**, **Time In**, and **Time Out**, if needed.

If the Service Date is left blank, it will default to the current date when this form is submitted.

After selecting the Service Date and Time In and Time Out on the first student, click **Mass Update Date & Times** at the bottom of the screen to apply these changes to the other students in the group. This button does not display if there is only one student in the group.

Additional Documentation

No Files

Choose a file or drag it here

Mass Update Date & Times Cancel Save as Draft or Submit Group

**i** When the system preference "Hide Time In, Time Out, and Duration on Caseloads & Services screen" is enabled, the Time In, Time Out, and Duration fields do not display. The Units field becomes a pull-down where you can select the units, 0.5 - 45.

**5.** Adjust the **Service**, if needed. One or multiple services can be selected.

The services available in the pull-down are driven by the provider role selected. The services allowed for the provider role are set up in SSS > Setup > [Services](#) tab.

In addition, only services set as "Group Service only" or "Both (Individual & Group Service)" in SSS > Setup > [Services](#) tab are available for selection.

**6.** If the student has an active IEP, select the **IEP Goal** from the student's goals, if applicable.

The goals from the student's current locked IEP, addendum IEP, EP, or SP are available for selection.

Service \*

Administered test in small groups (details in Notes)

IEP Goal

N/A

**7.** Enter **Additional Goals** and **Notes** for the individual student, if the field was not populated for the template.

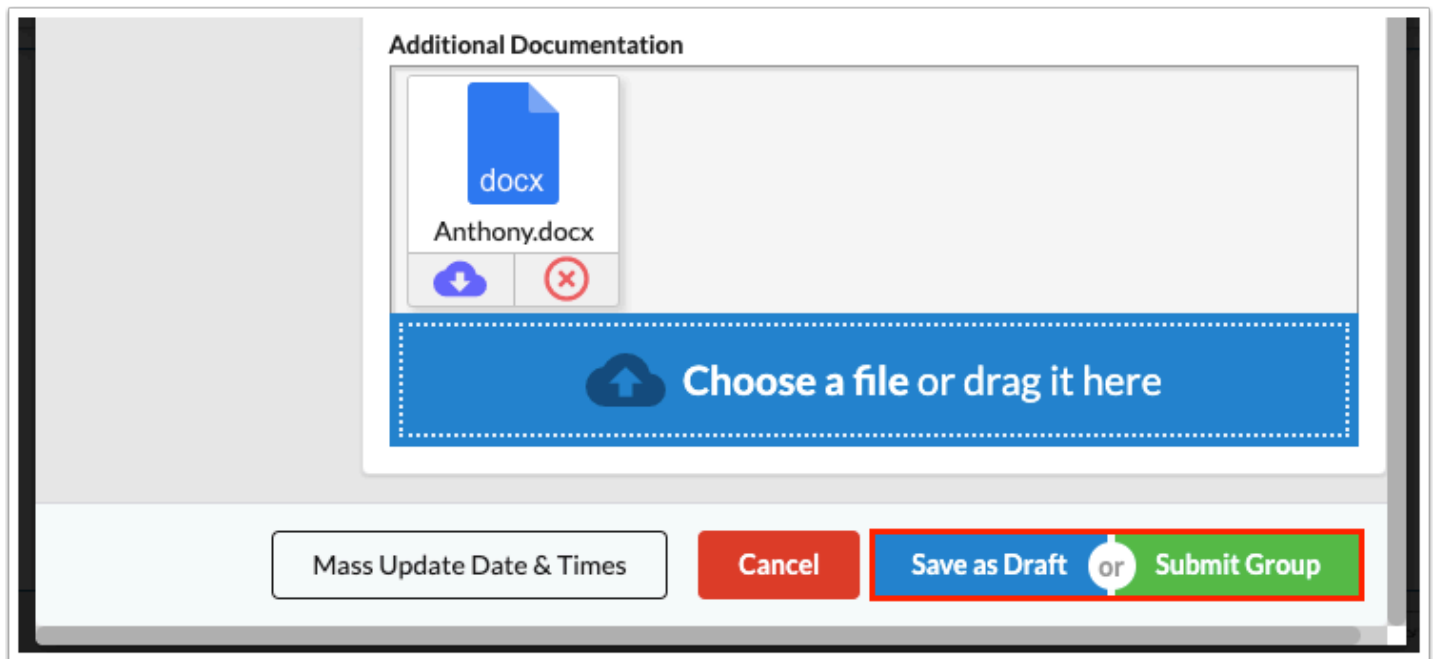
This screenshot shows the right-hand side of a form. On the left, a sidebar is partially visible with a toggle switch set to 'OFF' and a section titled 'Description 2' containing a 'Small group testing' button. The main area contains two text input fields: 'Additional Goals' at the top and 'Notes' below it. Both fields are empty and have a small icon in the bottom right corner.

8. To upload any supporting documentation, click and drag a file from your computer into the **Additional Documentation** section of the screen, or click **Choose a file** and select the file from your computer.

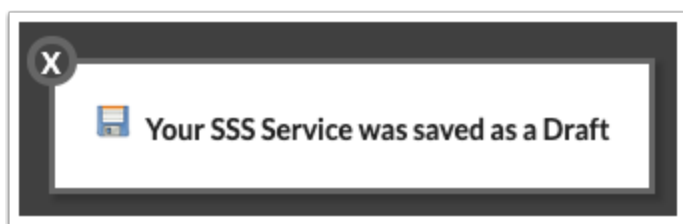
This screenshot shows the 'Additional Documentation' section of the form. It features a file upload interface with a blue document icon labeled 'docx' and the filename 'Anthony.docx'. Below the filename are two buttons: a blue download icon and a red delete icon. A large blue button with a cloud upload icon and the text 'Choose a file or drag it here' is positioned below the file preview. At the bottom of the form, there are four buttons: 'Mass Update Date & Times', 'Cancel', 'Save as Draft', and 'Submit Group', with the word 'or' between 'Save as Draft' and 'Submit Group'.

9. Click the next student in the list and complete each field as applicable.

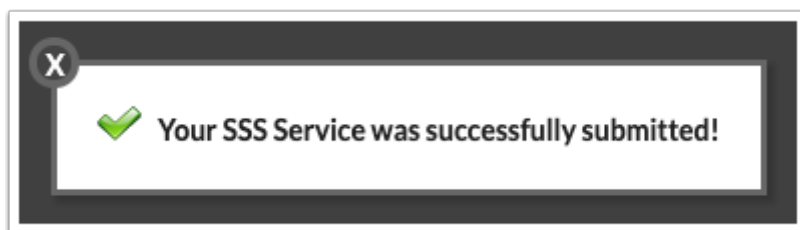
10. When finished, click **Save as Draft** or **Submit Group**.




After saving the group service as a draft, a pop-up will display indicating the draft was successfully saved.



After submitting the group service, a pop-up will display indicating the service was successfully saved.



-  If the service must be approved according to the [SSS Services approval flow](#), the pop-up will state "Your SSS Service was successfully submitted for approval!" In the [Service History](#) tab, the Status column will display as Pending, Approved, Denied, or Sent Back.

**11.** Click the **X** to close the pop-up.

# Setting Defaults on an Individual Student

When a service is regularly provided to an individual student, it may be useful to create template defaults for that student so that adding a service record is quicker.

## 1. Click the **Caseload** tab.

The screenshot shows the 'Caseload' tab selected in the top navigation bar. Below the navigation bar, there is a search bar with 'Abe, Charlie Noel' and two buttons: 'Add Service' and 'Add Student to My Caseload'. The main section is titled 'Caseload' and contains a table with 4 records. The table has columns for Student Name, Student ID, School, Last Serviced, User, and Group(s). Each row has three buttons: 'Add Service', 'Open Draft', and 'Set Defaults'.

Student Name	Student ID	School	Last Serviced	User	Group(s)	
Abregan, Kenna Joy	00061843	Focus High School - 0041	06/14/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	<input type="button" value="Add Service"/> <input type="button" value="Open Draft"/> <input type="button" value="Set Defaults"/>
Acosta, Harry P	00058780	Focus High School - 0041	06/15/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	<input type="button" value="Add Service"/> <input type="button" value="Open Draft"/> <input type="button" value="Set Defaults"/>
Aguilar, Emily Dickinson	00022481	Focus High School - 0041	06/15/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	<input type="button" value="Add Service"/> <input type="button" value="Open Draft"/> <input type="button" value="Set Defaults"/>
Ahrens, Edgar Allan	00057390	Focus High School - 0041	No services on record	Weiss, Ashley		<input type="button" value="Add Service"/> <input type="button" value="Open Draft"/> <input type="button" value="Set Defaults"/>

## 2. In the **Caseload** section of the screen, click **Set Defaults** next to the student.

The screenshot shows the same 'Caseload' tab as before, but the 'Set Defaults' button for the student 'Ahrens, Edgar Allan' is highlighted with a red border.

Student Name	Student ID	School	Last Serviced	User	Group(s)	
Abregan, Kenna Joy	00061843	Focus High School - 0041	06/14/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	<input type="button" value="Add Service"/> <input type="button" value="Open Draft"/> <input type="button" value="Set Defaults"/>
Acosta, Harry P	00058780	Focus High School - 0041	06/15/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	<input type="button" value="Add Service"/> <input type="button" value="Open Draft"/> <input type="button" value="Set Defaults"/>
Aguilar, Emily Dickinson	00022481	Focus High School - 0041	06/15/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	<input type="button" value="Add Service"/> <input type="button" value="Open Draft"/> <input type="button" value="Set Defaults"/>
Ahrens, Edgar Allan	00057390	Focus High School - 0041	No services on record	Weiss, Ashley		<input type="button" value="Add Service"/> <input type="button" value="Open Draft"/> <input type="button" value="Set Defaults"/>

A pop-up window with a service record template is displayed.

## 3. Fill out the fields as needed.

If the Service Date is left blank, it will default with the current date when the template is submitted for the student.



**Ahrens, Edgar Allan - Template Defaults**

☐ This student was absent on this day

Service Date  Service Provider Weiss, Ashley

Time In  Time Out  Duration 30 min. Units 2 units

Provider Role  Reading Coach

Service  Allowed dictation of answers for assignment/test

IEP Goal  N/A

Additional Goals


Notes

#### 4. Click **Save as Template**.

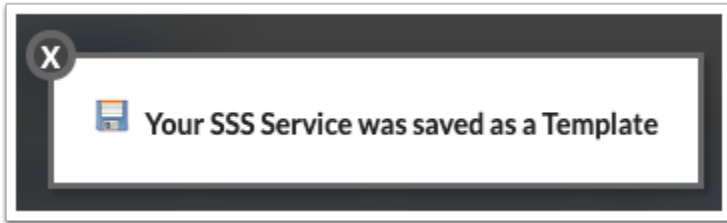
**Notes**

**Additional Documentation**

No Files

 Choose a file or drag it here

After submitting the template, a pop-up will display indicating the template was successfully saved.



- Click the **X** to close the pop-up.
- To use the template, click **Add Service** next to the student in your caseload.

Caseload Groups Service History Service Billing Drafts

Add to Caseload

Abe, Charlie Noel

Add Service

Add Student to My Caseload

Caseload

View All Users

4 Records

Export

Filter: OFF

Toggle Columns

Page Size: 25

Student Name	Student ID	School	Last Serviced	User	Group(s)			
Abregan, Kenna Joy	00061843	Focus High School - 0041	06/14/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	Add Service	Open Draft	Set Defaults
Acosta, Harry P	00058780	Focus High School - 0041	06/15/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	Add Service	Open Draft	Set Defaults
Aguilar, Emily Dickinson	00022481	Focus High School - 0041	06/15/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	Add Service	Open Draft	Set Defaults
Ahrens, Edgar Allan	00057390	Focus High School - 0041	No services on record	Weiss, Ashley		Add Service	Open Draft	Set Defaults

The service record pop-up window is pre-populated with the settings you saved in the template.

- Complete the fields as needed and click **Submit**.

IEP Goal  
N/A

Additional Goals

Notes

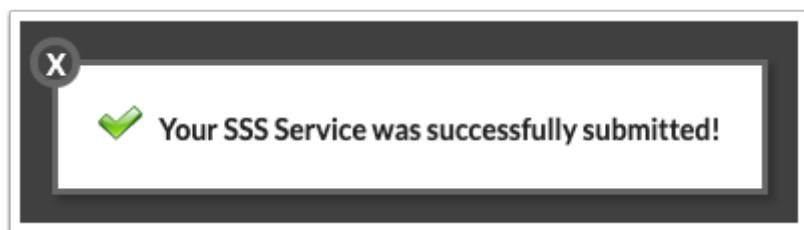
Additional Documentation

No Files

Choose a file or drag it here

Cancel Save as Draft Submit

After submitting the service, a pop-up will display indicating the service was successfully submitted.



- i** If the service must be approved according to the [SSS Services approval flow](#), the pop-up will state "Your SSS Service was successfully submitted for approval!" In the [Service History](#) tab, the Status column will display as Pending, Approved, Denied, or Sent Back.

8. Click the **X** to close the pop-up.

## Submitting a Draft for an Individual Student

1. Click the **Drafts** tab.

Caseload Groups Service History Service Billing <b>Drafts</b>												
Drafts												
1 Records <a href="#">Export</a> <a href="#">Filter: OFF</a> <a href="#">Toggle Columns</a> <a href="#">Page Size: 25</a>												
Service Date	Student Name	Student ID	School	Time In	Time Out	Duration	Units	IEP Goal	Service Provider	Provider Role	Service	Additional Go
06/14/2023	Alec, Colleen Joan	00061891	Focus High School - 0041	8:30 am	9:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Allowed dictation of answers for assignment/test	

All of the drafts you have saved are listed. Each field on the service record is listed as a column.

2. Click the **Edit** to open the draft.

Caseload Groups Service History Service Billing <b>Drafts</b>												
Drafts												
1 Records <a href="#">Export</a> <a href="#">Filter: OFF</a> <a href="#">Toggle Columns</a> <a href="#">Page Size: 25</a>												
School	Time In	Time Out	Duration	Units	IEP Goal	Service Provider	Provider Role	Service	Additional Goals	Notes	Additional Docs	
Focus High School - 0041	8:30 am	9:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Allowed dictation of answers for assignment/test				<a href="#">Edit</a>

3. Complete the service fields as needed and click **Submit**.

Notes

Additional Documentation

No Files

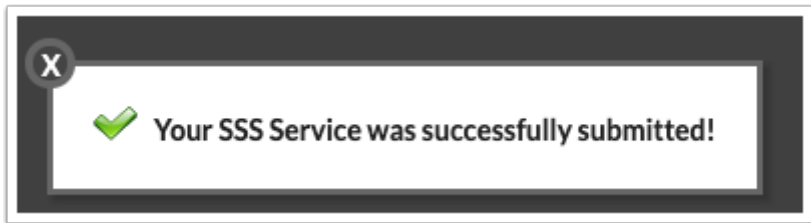
Choose a file or drag it here

Cancel

Save as Draft

Submit

After submitting the service record, a pop-up will display indicating the service was successfully submitted.



**i** If the service must be approved according to the [SSS Services approval flow](#), the pop-up will state "Your SSS Service was successfully submitted for approval!" In the [Service History](#) tab, the Status column will display as Pending, Approved, Denied, or Sent Back.

4. Click the **X** to close the pop-up.

**💡** You can also access a saved draft for an individual student in your caseload by clicking **Open Draft** next to the student in the Caseload section of the screen in the Caseload tab.

CaseloadGroupsService HistoryService BillingDrafts

Add to Caseload

Abe, Charlie NoelAdd ServiceAdd Student to My Caseload

Caseload

View All Users

5 RecordsExportFilter: OFFToggle ColumnsPage Size: 25

Student Name	Student ID	School	Last Serviced	User	Group(s)	
Abregan, Kenna Joy	00061843	Focus High School - 0041	06/14/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	<div>Add ServiceOpen DraftSet Defaults</div>
Acosta, Harry P	00058780	Focus High School - 0041	06/15/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	<div>Add ServiceOpen DraftSet Defaults</div>
Aguilar, Emily Dickinson	00022481	Focus High School - 0041	06/15/2023 10:30 am - Weiss, Ashley	Weiss, Ashley	ELA	<div>Add ServiceOpen DraftSet Defaults</div>
Ahrens, Edgar Allan	00057390	Focus High School - 0041	06/12/2023 2:00 pm - Weiss, Ashley	Weiss, Ashley		<div>Add ServiceOpen DraftSet Defaults</div>
Alec, Colleen Joan	00061891	Focus High School - 0041	No services on record	Weiss, Ashley		<div>Add ServiceOpen DraftSet Defaults</div>

## Submitting a Group Draft

1. Click the **Groups** tab.

**Caseload Groups**

1 Records [Export](#) [Filter: OFF](#) [Toggle Columns](#) [Page Size: 25](#)

Title	Service Code	Description
ELA	SSS01 - Administered test in small groups (details in Notes)	Small group testing for ELA

[Add Group Service](#)

2. Click **Open Group Draft** next to the appropriate group.

**Caseload Groups**

1 Records [Export](#) [Filter: OFF](#) [Toggle Columns](#) [Page Size: 25](#)

Title	Service Code	Description
ELA	SSS01 - Administered test in small groups (details in Notes)	Small group testing for ELA

[Add Group Service](#) [Open Group Draft](#) [Set Group Defaults](#)

3. Complete service fields for each student and click **Submit Group**.

**IEP Goal**  
N/A

**Additional Goals**

**Notes**

**Additional Documentation**  
Anthony.docx

[Choose a file or drag it here](#)

[Mass Update Date & Times](#) [Cancel](#) [Save as Draft](#) [Submit Group](#)

After submitting the group service, a pop-up will display indicating the service was successfully submitted.



**i** If the service must be approved according to the [SSS Services approval flow](#), the pop-up will state "Your SSS Service was successfully submitted for approval!" In the [Service History](#) tab, the Status column will display as Pending, Approved, Denied, or Sent Back.

4. Click the **X** to close the pop-up.

## Viewing Service History

The Service History tab displays the service records you have submitted. If you have the "View All Users" profile permission for Caseload & Services, you can view service records that all users have submitted.

1. Click the **Service History** tab.

A screenshot of the "Service History" tab in the Caseload & Services interface. The tab is highlighted with a red box. The interface includes a header with tabs: Caseload, Groups, Service History, Service Billing, and Drafts. Below the header, there is a search bar with fields for Provider, Student, Start Date, and End Date. The Start Date is set to 08/01/2022 and the End Date is set to 06/15/2023. There are checkboxes for "Include Inactive" and "Include Previous Years Inactive Students". A blue "Submit" button is located at the bottom right of the search bar.

2. (Optional) In the **Provider** pull-down, select one or multiple providers to view on the report. Only users with the "View All Users" profile permission can select providers other than themselves.

3. (Optional) In the **Student** pull-down, select one or multiple students to view on the report.

For users with the "View All Users" profile permission, the Student pull-down will be restricted by the school selected at the top-right of the screen, as well as any providers selected in the Provider pull-down, in order to limit how many students are returned. For users without the "View All Users" profile permission, the Student pull-down is not restricted by the school, but only the provider.

4. Adjust the **Start Date** and **End Date** as needed.

5. To include inactive students, select **Include Inactive**.

6. To include inactive students from previous years, select **Include Previous Years Inactive Students**.

7. Click **Submit**.

The screenshot shows the 'Service History' form with the following fields and options:

- Provider: [Dropdown]
- Student: [Dropdown]
- Start Date: 08/01/2022
- End Date: 06/15/2023
- ☐ Include Inactive
- ☐ Include Previous Years Inactive Students
- Submit** (highlighted with a red box)

The service records that have been submitted between the dates are listed, including each of the service fields.

**i** When the system preference "Hide Time In, Time Out, and Duration on Caseloads & Services screen" is enabled, the Time In, Time Out, and Duration fields do not display.

The screenshot shows the 'Service History' table with 8 records. The table has the following columns: Service Date, Student Name, Student ID, School, Time In, Time Out, Duration, Units, IEP Goal, Service Provider, Provider Role, and Service. The records are as follows:

Service Date	Student Name	Student ID	School	Time In	Time Out	Duration	Units	IEP Goal	Service Provider	Provider Role	Service
06/15/2023	Abe, Charlie Noel	00055879	Focus High School - 0041	9:00 am	10:00 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Assignment/test administered in alternate locat
06/15/2023	Acosta, Harry P	00058780	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/15/2023	Acosta, Harry P	00058780	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/15/2023	Aguilar, Emily Dickinson	00022481	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/15/2023	Aguilar, Emily Dickinson	00022481	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/14/2023	Abregan, Kenna Joy	00061843	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/12/2023	Ahrens, Edgar Allan	00057390	Focus High School - 0041	2:00 pm	2:30 pm	min.	1.5 units	N/A	Weiss, Ashley	Reading Coach	Allowed dictation of answers for assignment/te
11/07/2022	Anthony, Vernon Dudley	00078990	Focus High School - 0041	11:45 am	12:01 pm	min.	0.5 units	N/A	Weiss, Ashley	SLP	Allowed dictation of answers for assignment/te
							Page Total: 23.00 Units				
							Total: 23.00 Units				

8. If the service requires approval according to the SSS Services [approval flow](#), the **Status** column will display Pending, Approved, Denied, or Sent Back. Hover over the column to view the approval chain.



Caseload Groups **Service History** Service Billing Drafts Signature History Pending Signature

Service History

Provider:  Student:  Start Date: 08/01/2022 End Date: 12/01/2023 ☐ Include Inactive

☐ Include Previous Years Inactive Students **Submit**

12 Records **Export** **Filter: OFF** **Toggle Columns** **Page Size: 25**

Units	IEP Goal	Service Provider	Provider Role	Service	Additional Goals	Notes	Additional Docs	Status	
3.5 units	N/A	Abernathy, Nora Robin	Reading Coach	Administered test in small groups (details in Notes)				Pending	
3.5 units	N/A	Abernathy, Nora Robin	Reading Coach	Assignment/test administered in alternate location				Denied	
3.5 units	N/A	Abernathy, Nora Robin	Reading Coach	Assignment/test administered in alternate location				Approved	
3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a> <a href="#">Unlock</a>
4.5 units	N/A	Weiss, Ashley	Reading Coach	Assignment/test administered in alternate location				Approved	<a href="#">Edit</a> <a href="#">Unlock</a>
3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a> <a href="#">Unlock</a>
3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a> <a href="#">Unlock</a>
3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a> <a href="#">Unlock</a>
3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a> <a href="#">Unlock</a>

**Approval Chain**  
— Approval Group 1 —  
Weiss, Ashley

9. Click the student's name to open the Manage Student screen for that student.

Caseload Groups **Service History** Service Billing Drafts

Service History

Provider:  Student:  Start Date: 08/01/2022 End Date: 06/15/2023 ☐ Include Inactive

☐ Include Previous Years Inactive Students **Submit**

8 Records **Export** **Filter: OFF** **Toggle Columns** **Page Size: 25**

Service Date	Student Name	Student ID	School	Time In	Time Out	Duration	Units	IEP Goal	Service Provider	Provider Role	Service
06/15/2023	<a href="#">Abe, Charlie Noel</a>	00055879	Focus High School - 0041	9:00 am	10:00 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Assignment/test administered in alternate locat
06/15/2023	<a href="#">Acosta, Harry P</a>	00058780	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/15/2023	<a href="#">Acosta, Harry P</a>	00058780	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/15/2023	<a href="#">Aguilar, Emily Dickinson</a>	00022481	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/15/2023	<a href="#">Aguilar, Emily Dickinson</a>	00022481	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/14/2023	<a href="#">Abregan, Kenna Joy</a>	00061843	Focus High School - 0041	10:30 am	11:30 am	min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Not
06/12/2023	<a href="#">Ahrens, Edgar Allan</a>	00057390	Focus High School - 0041	2:00 pm	2:30 pm	min.	1.5 units	N/A	Weiss, Ashley	Reading Coach	Allowed dictation of answers for assignment/te
11/07/2022	<a href="#">Anthony, Vernon Dudley</a>	00078990	Focus High School - 0041	11:45 am	12:01 pm	min.	0.5 units	N/A	Weiss, Ashley	SLP	Allowed dictation of answers for assignment/te
							Page Total: 23.00 Units				
							Total: 23.00 Units				

10. To edit a service record, scroll to the right and click **Unlock**.

[Caseload](#)
[Groups](#)
[Service History](#)
[Service Billing](#)
[Drafts](#)

### Service History

Provider:  Student:  Start Date:  End Date:  ☐ Include Inactive  
☐ Include Previous Years Inactive Students [Submit](#)

8 Records [Export](#) [Filter: OFF](#) [Toggle Columns](#) [Page Size: 25](#)

Duration	Units	IEP Goal	Service Provider	Provider Role	Service	Additional Goals	Notes	Additional Docs	Status		
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Assignment/test administered in alternate location				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	1.5 units	N/A	Weiss, Ashley	Reading Coach	Allowed dictation of answers for assignment/test				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	0.5 units	N/A	Weiss, Ashley	SLP	Allowed dictation of answers for assignment/test				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
Page Total: 23.00 Units											
Total: 23.00 Units											

## 11. Click **Edit**.

[Caseload](#)
[Groups](#)
[Service History](#)
[Service Billing](#)
[Drafts](#)

### Service History

Provider:  Student:  Start Date:  End Date:  ☐ Include Inactive  
☐ Include Previous Years Inactive Students [Submit](#)

8 Records [Export](#) [Filter: OFF](#) [Toggle Columns](#) [Page Size: 25](#)

Duration	Units	IEP Goal	Service Provider	Provider Role	Service	Additional Goals	Notes	Additional Docs	Status		
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Assignment/test administered in alternate location				Approved	<a href="#">Edit</a>	<a href="#">Lock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	3.5 units	N/A	Weiss, Ashley	Reading Coach	Administered test in small groups (details in Notes)				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	1.5 units	N/A	Weiss, Ashley	Reading Coach	Allowed dictation of answers for assignment/test				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
min.	0.5 units	N/A	Weiss, Ashley	SLP	Allowed dictation of answers for assignment/test				Approved	<a href="#">Edit</a>	<a href="#">Unlock</a>
Page Total: 23.00 Units											
Total: 23.00 Units											

## 12. After making your changes, click **Re-submit**.

Notes

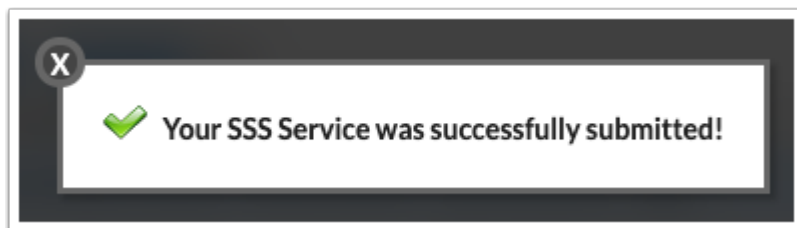
Additional Documentation

docx  
Abe.docx

Choose a file or drag it here

Cancel Re-submit

After re-submitting the service, a pop-up will display indicating the service was successfully submitted.



- i** If the service must be approved according to the [SSS Services approval flow](#), the pop-up will state "Your SSS Service was successfully submitted for approval!" In the [Service History](#) tab, the Status column will display as Pending, Approved, Denied, or Sent Back.

**13.** Click the **X** to close the pop-up.

# Billing Students for Services

Users who have the profile permission "Bill Students" for the Caseload & Services screen are able to view the Service Billing tab. When a service has an item from the Internal Accounts Product List attached to it in the SSS > Setup > [Services](#) tab, students can be billed for that service and an invoice printed. The Point of Sale screen in ERP will be updated with the invoice. If the voucher functionality is set up and the student has a voucher, it will be applied to the invoice.

**i** The system preference "Hide Time In, Time Out, and Duration on Caseload & Services screen" on the General tab in System Preferences is used to hide the Time In, Time Out, and Duration fields when adding a service to a student and allow the Units to be set by the user. When billing a student, the cost of the item associated with the service is multiplied by the units.

## 1. Click the **Service Billing** tab.

Students who have received services at the school selected at the top-right of the screen are listed, along with the service date, school, and units. The Invoiced column will display a red X if the student has not yet been invoiced, and a green check mark if the student has been previously invoiced.

**i** If service must be approved according to the [SSS Services approval flow](#), the service will not display on the Service Billing tab until it has been approved.

Service Date	Student Name	Student ID	School	Units	Invoiced
10/28/2022	Acosta, Jerry	00081751	Focus Elementary School - 0311	3.5 units	X
10/26/2022	Castillo, Heather	00076169	Focus Elementary School - 0311	7.5 units	X
				Page Total: 11.00 Units	
				Total: 11.00 Units	

## 2. If you have access to more than one school, click **View All Schools** to view students who have received services at all of your schools.

Service Billing

**View All Schools**

2 Records   Export   Filter: OFF   Toggle Columns   Page Size: 25

<input type="checkbox"/>	Service Date	Student Name	Student ID	School	Units	Invoiced
<input type="checkbox"/>	10/28/2022	Acosta, Jerry	00081751	Focus Elementary School - 0311	3.5 units	✗
<input type="checkbox"/>	10/26/2022	Castillo, Heather	00076169	Focus Elementary School - 0311	7.5 units	✗
					Page Total: 11.00 Units Total: 11.00 Units	

Bill

3. Click **View One School** to return to viewing students for the school selected at the top-right of the screen.

Service Billing

**View One School**

3 Records   Export   Filter: OFF   Toggle Columns   Page Size: 25

<input type="checkbox"/>	Service Date	Student Name	Student ID	School	Units	Invoiced
<input type="checkbox"/>	11/07/2022	Anthony, Vernon Dudley	00078990	Focus High School - 0041	0.5 units	✗
<input type="checkbox"/>	10/28/2022	Acosta, Jerry	00081751	Focus Elementary School - 0311	3.5 units	✗
<input type="checkbox"/>	10/26/2022	Castillo, Heather	00076169	Focus Elementary School - 0311	7.5 units	✗
					Page Total: 11.50 Units Total: 11.50 Units	

Bill

4. Select the check boxes next to the students to invoice, or select the check box in the column header to select all students in the list.

5. Click **Bill**.

Service Billing

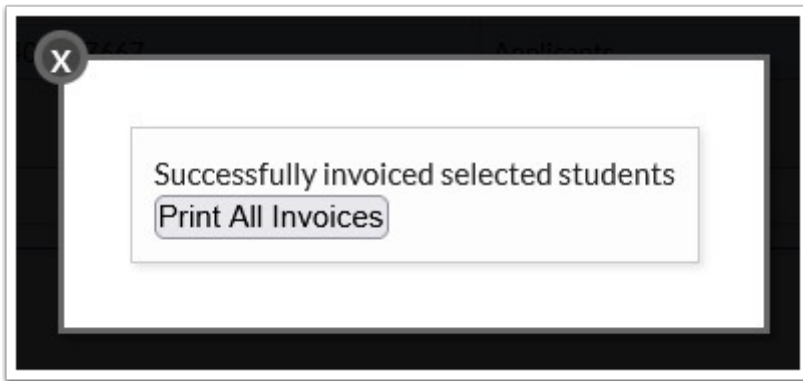
**View All Schools**

2 Records   Export   Filter: OFF   Toggle Columns   Page Size: 25

<input type="checkbox"/>	Service Date	Student Name	Student ID	School	Units	Invoiced
<input checked="" type="checkbox"/>	10/28/2022	Acosta, Jerry	00081751	Focus Elementary School - 0311	3.5 units	✗
<input type="checkbox"/>	10/26/2022	Castillo, Heather	00076169	Focus Elementary School - 0311	7.5 units	✗
					Page Total: 11.00 Units Total: 11.00 Units	

**Bill**

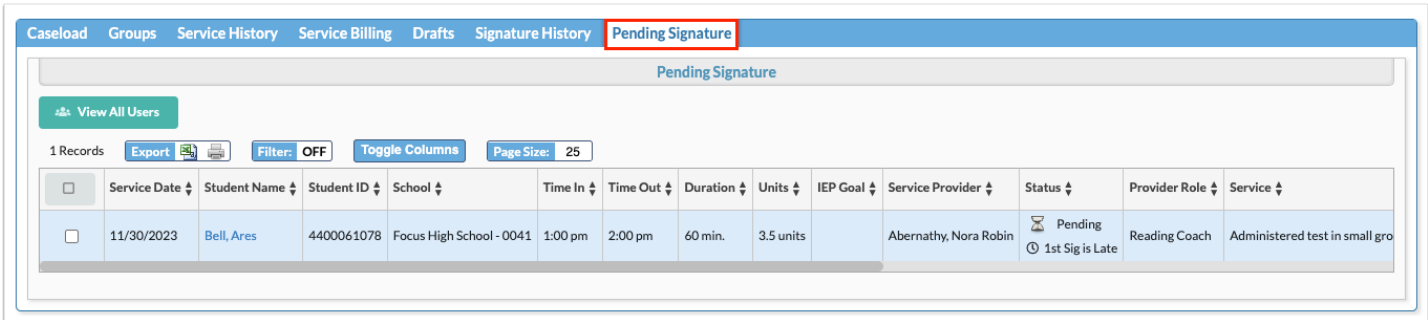
Invoices are generated for the selected students. In the pop-up window, click **Print All Invoices** to print the invoices. A PDF will open in a new tab, which can be saved or printed. Close the pop-up window when finished.



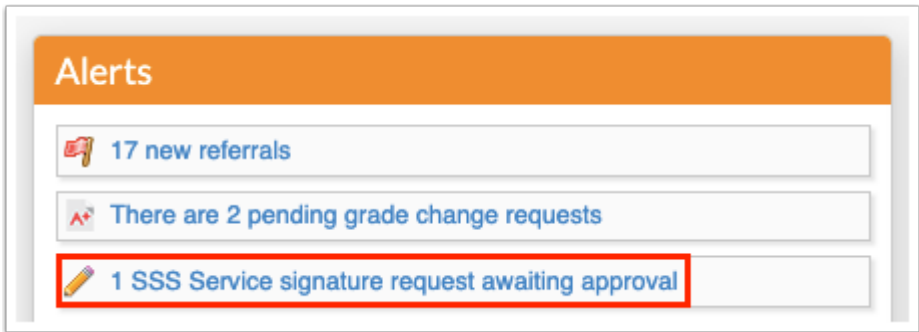
# Viewing Services Pending Signature

When an SSS Services [approval flow](#) is set up, the Pending Signature tab displays services that have been submitted and are waiting for approval. Users who are part of the approval chain will receive a Portal alert when a service is waiting for approval. The approver can approve the service, deny the service, or send the record back to the originator.

- 1. Click the **Pending Signature** tab on the Caseload & Services screen.

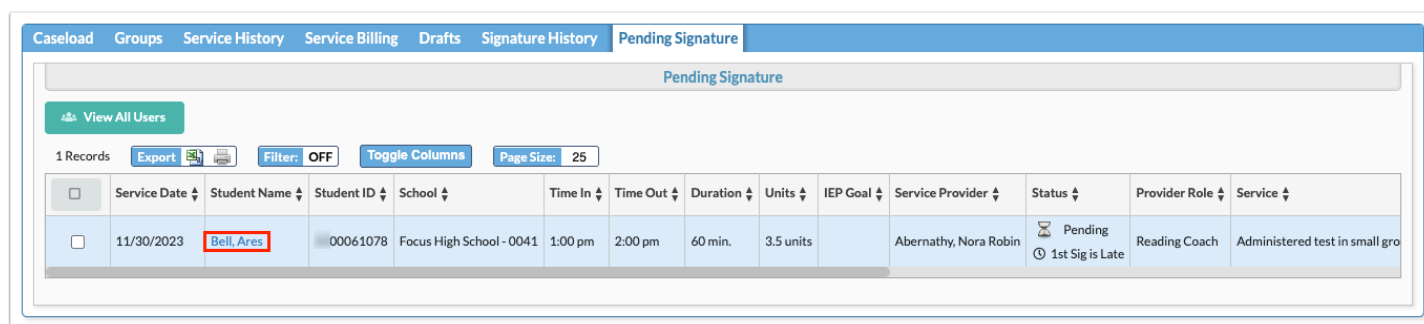


Alternatively, users in the approval chain can click the Portal alert "SSS Service signature request awaiting approval" to open the Pending Signature tab of the Caseload & Services screen.



The service records pending approval are listed.

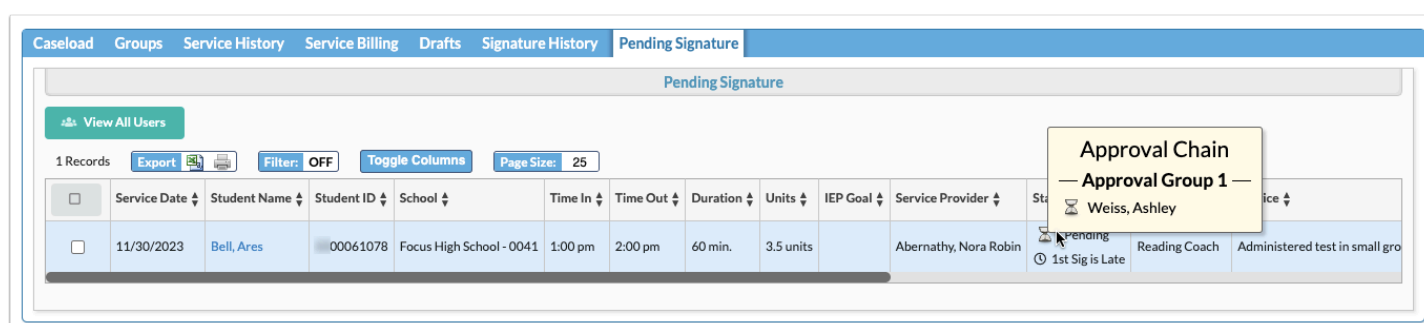
3. Click the student's name to open the [Manage Student](#) screen for that student.



The screenshot shows the 'Pending Signature' tab in a software interface. At the top, there are navigation tabs: Caseload, Groups, Service History, Service Billing, Drafts, Signature History, and Pending Signature. Below these is a sub-header 'Pending Signature'. A 'View All Users' button is on the left. A toolbar contains '1 Records', 'Export', 'Filter: OFF', 'Toggle Columns', and 'Page Size: 25'. The main table has columns: Service Date, Student Name, Student ID, School, Time In, Time Out, Duration, Units, IEP Goal, Service Provider, Status, Provider Role, and Service. The first row shows a record for 'Bell, Ares' with status 'Pending' and a note '1st Sig is Late'.

Service Date	Student Name	Student ID	School	Time In	Time Out	Duration	Units	IEP Goal	Service Provider	Status	Provider Role	Service
11/30/2023	Bell, Ares	00061078	Focus High School - 0041	1:00 pm	2:00 pm	60 min.	3.5 units		Abernathy, Nora Robin	Pending 1st Sig is Late	Reading Coach	Administered test in small gro

4. Hover the mouse over the Status column to view the approval chain.

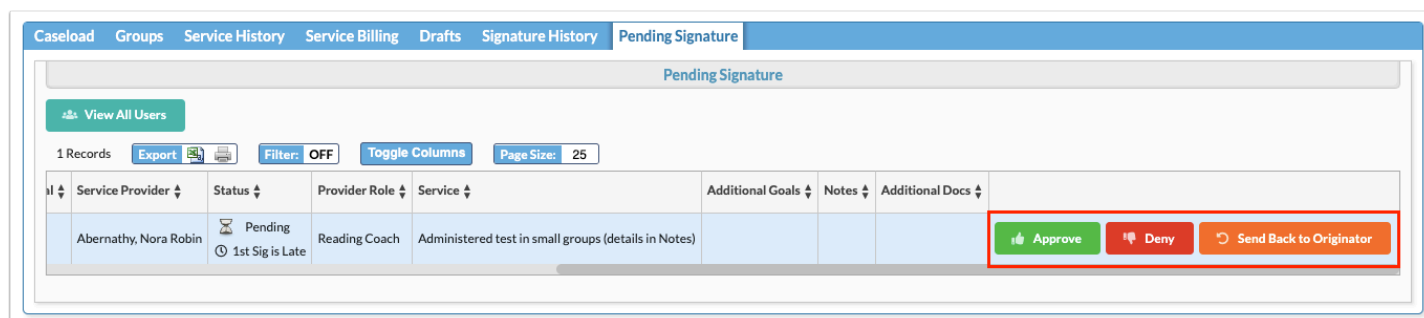


This screenshot is similar to the previous one but includes a tooltip for the 'Status' column. The tooltip is titled 'Approval Chain' and shows 'Approval Group 1' with 'Weiss, Ashley' as the approver. The status in the table is 'Pending' with a note '1st Sig is Late'.

Service Date	Student Name	Student ID	School	Time In	Time Out	Duration	Units	IEP Goal	Service Provider	Status	Provider Role	Service
11/30/2023	Bell, Ares	00061078	Focus High School - 0041	1:00 pm	2:00 pm	60 min.	3.5 units		Abernathy, Nora Robin	Pending 1st Sig is Late	Reading Coach	Administered test in small gro

5. If you are the approver, click **Approve**, **Deny**, or **Send Back to Originator**.

The Status will update to Approved, Denied, or Sent Back in [Service History](#). When the service record is sent back, the originator can edit the service record from Service History and re-submit it for approval.



This screenshot shows the bottom of the 'Pending Signature' screen. The table has columns: Service Provider, Status, Provider Role, Service, Additional Goals, Notes, and Additional Docs. The first row shows 'Abernathy, Nora Robin' with status 'Pending' and a note '1st Sig is Late'. At the bottom right, there are three buttons: 'Approve' (green), 'Deny' (red), and 'Send Back to Originator' (orange), all of which are highlighted with a red border.

Service Provider	Status	Provider Role	Service	Additional Goals	Notes	Additional Docs
Abernathy, Nora Robin	Pending 1st Sig is Late	Reading Coach	Administered test in small groups (details in Notes)			

## Viewing Signature History

When an SSS Services [approval flow](#) is set up, the Signature History tab displays the service records you have approved and denied.

1. Click the **Signature History** tab.

CaseloadGroupsService HistoryService BillingDraftsSignature HistoryPending Signature

Signature History

2 RecordsExportFilter: OFFToggle ColumnsPage Size: 25

Service Date	Student Name	Student ID	School	Time In	Time Out	Duration	Units	IEP Goal	Provider Role	Service	Additional Goals	Notes
11/30/2023	Cano, Peter Isabel	00083780	Focus High School - 0041	9:00 am	10:00 am	60 min.	3.5 units		Reading Coach	Assignment/test administered in alternate location		
11/30/2023	Cano, Peter Isabel	00083780	Focus High School - 0041	9:00 am	10:00 am	60 min.	3.5 units		Reading Coach	Assignment/test administered in alternate location		

- The service records you have approved or denied are listed.
2. Click the student's name to open the [Manage Student](#) screen for the student.
3. Hover the mouse over the **Status** column to view the approval chain, and a date and time stamp of the approval or denial.

CaseloadGroupsService HistoryService BillingDraftsSignature HistoryPending Signature

Signature History

2 RecordsExportFilter: OFFToggle ColumnsPage Size: 25

Student ID	School	Time In	Time Out	Duration	Units	IEP Goal	Provider Role	Service	Additional
4400083780	Focus High School - 0041	9:00 am	10:00 am	60 min.	3.5 units		Reading Coach	Assignment/test administered in alternate location	
4400083780	Focus High School - 0041	9:00 am	10:00 am	60 min.	3.5 units		Reading Coach	Assignment/test administered in alternate location	

Approval Chain

Approval Group 1

Weiss, Ashley - 11/30/2023 12:42pm