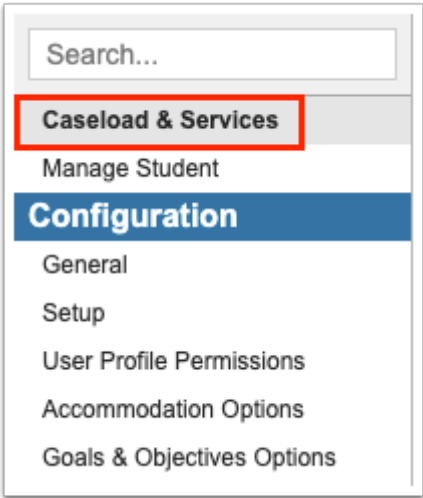# Caseload & Services

The Caseload & Services screen allows teachers and service providers to document the services, accommodations, and modifications they provide to students.
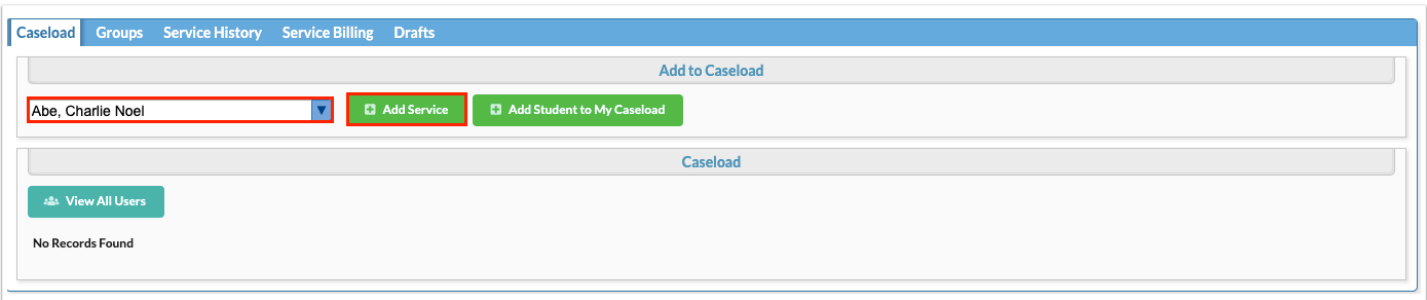
Adding a Service to an Individual Student

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.
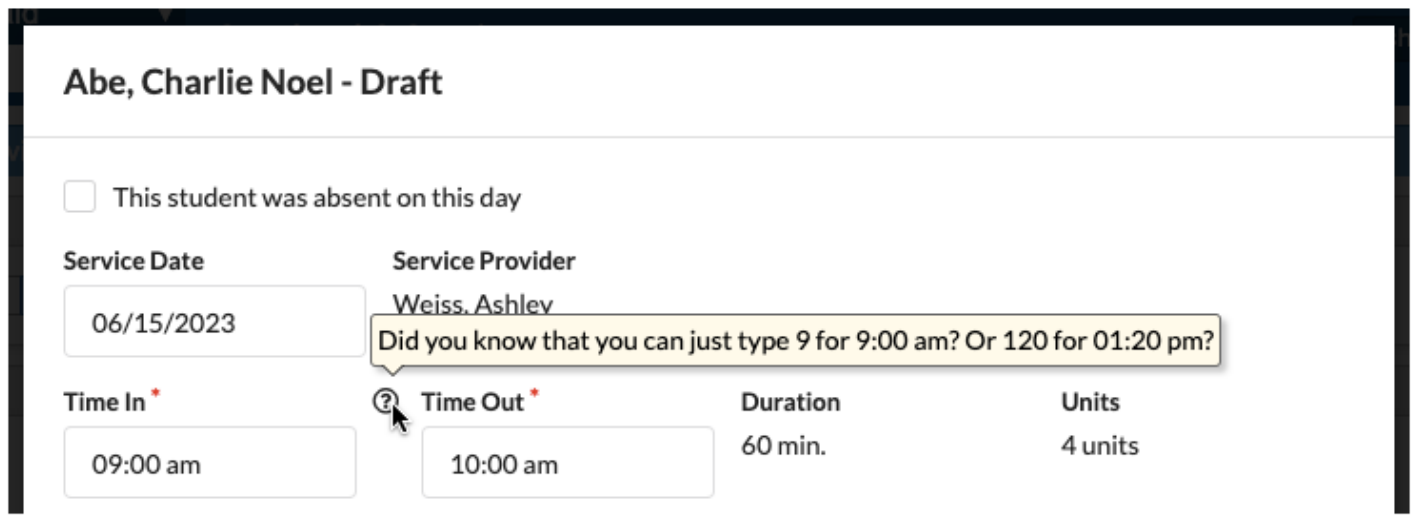
> **i** The Service Provider is auto-populated with your name.

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
06/15/2023	Weiss, Ashley

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

Time In *	② Time Out *	Duration	Units
09:00 am	10:00 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.

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.

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.

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**.
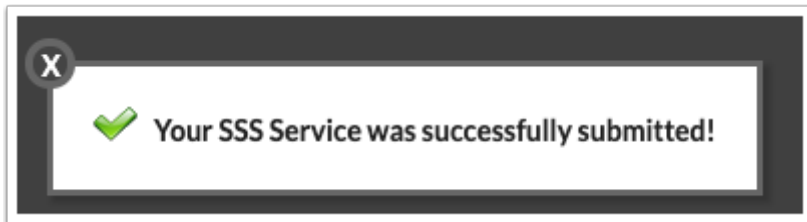

After saving the service record as a draft, a pop-up will display indicating the service was saved.
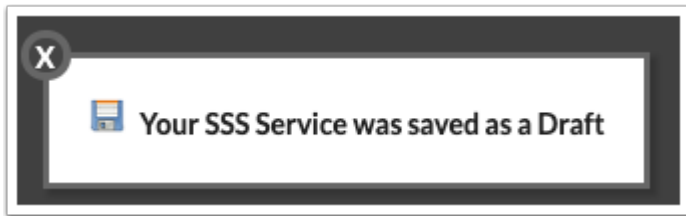
After submitting the service record, a pop-up will display indicating the service was successfully submitted.

ℹ️ 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.

ℹ️ 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**.

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.

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

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.

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.

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

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
Weiss, Ashley

Time In *   ⑦ Time Out *   Duration   Units
                                         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
Weiss, Ashley
Did you know that you can just type 9 for 9:00 am? Or 120 for 01:20 pm?

Time In *   ⑦ Time Out *   Duration   Units
10:30 am   11:30 am   60 min.   4 units

ℹ️ 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.

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

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

12. Click **Save as Template**.

After submitting the template, a pop-up will display indicating the template was successfully saved.
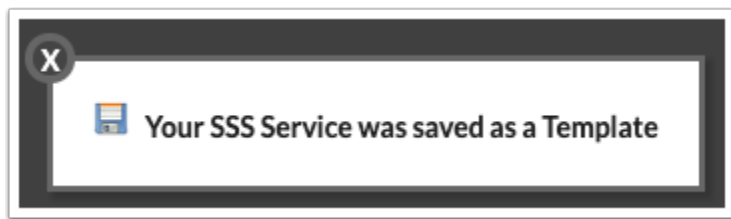
13. Click the **X** to close the pop-up.

Adding a Student to a Group

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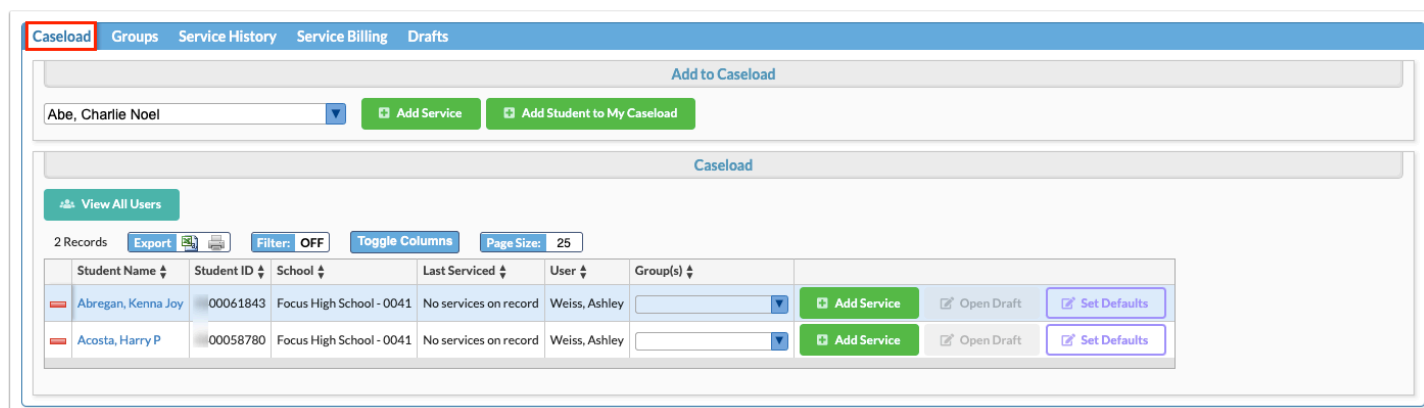
2. In the Caseload section next to the student, select the **Group(s)** to assign to the student. One or multiple can be selected.

The groups are auto-saved.
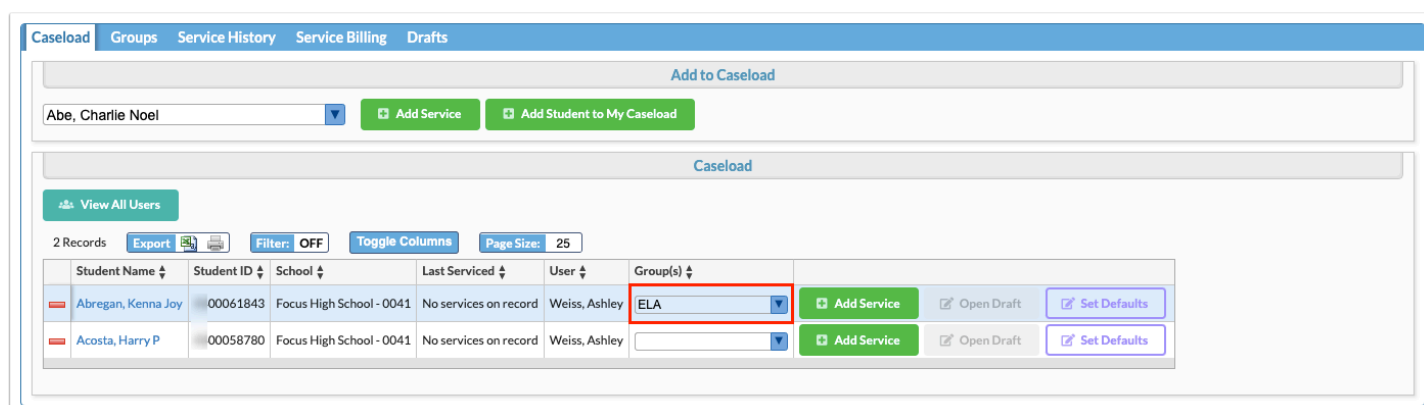
Mass Adding a Service to a Group of Students

1. Click the **Groups** tab.

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

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.

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.

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.

> ℹ️ 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.

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

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.

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

10. When finished, click **Save as Draft** or **Submit Group**.
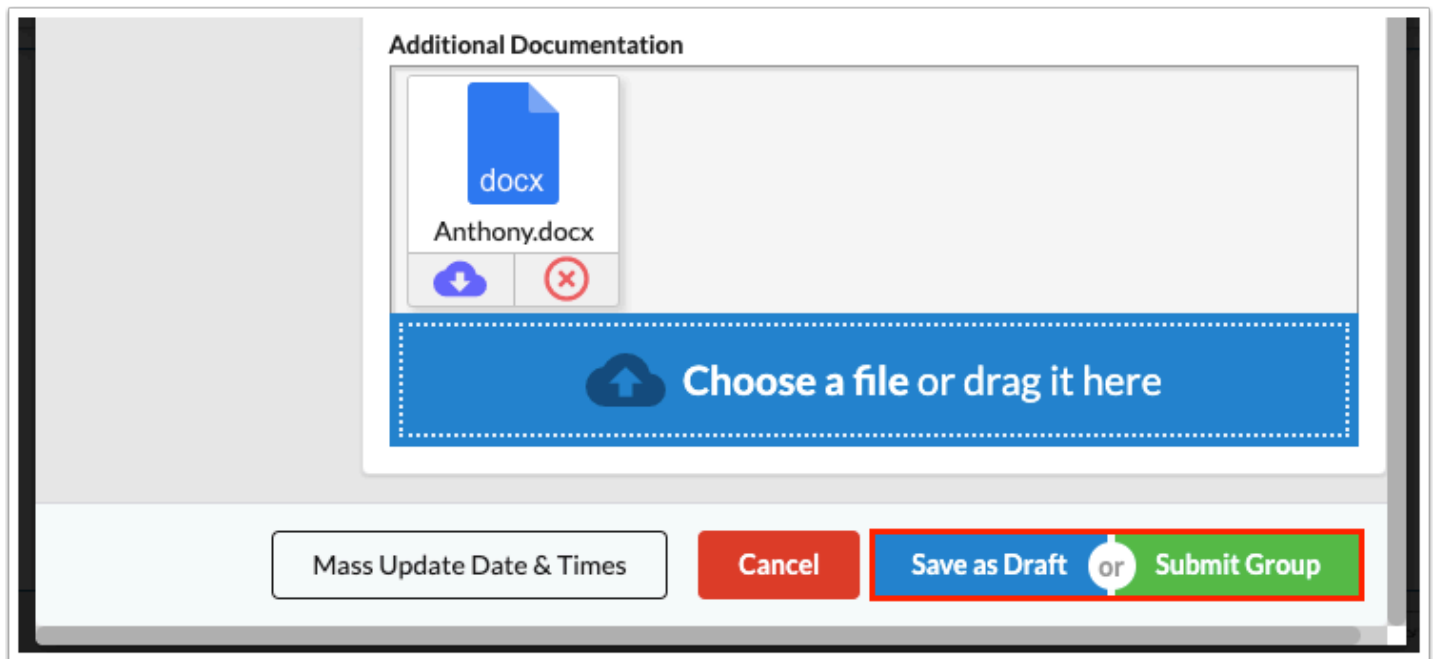
After saving the group service as a draft, a pop-up will display indicating the draft was successfully saved.
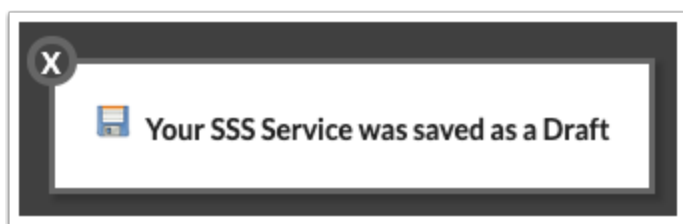
After submitting the group service, a pop-up will display indicating the service was successfully saved.
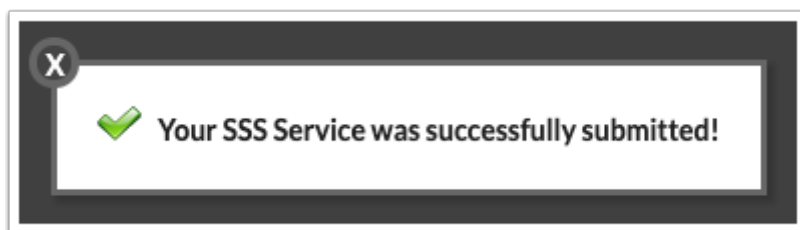
ℹ If the service must be approved according to the SSS Services approval flow, the pop-up will state "Your SSS Service was successfully submitted for approval!" In the Service History tab, the Status column will display as Pending, Approved, Denied, or Sent Back.

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.

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

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 *   ⑦ **Time Out** *   **Duration**   **Units**
                                            30 min.   2 units
02:00 pm   02:30 pm

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

Cancel   **Save as Template**

After submitting the template, a pop-up will display indicating the template was successfully saved.
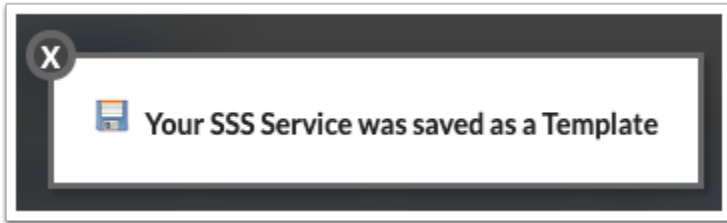
5. Click the **X** to close the pop-up.

6. To use the template, click **Add Service** next to the student in your caseload.

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

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

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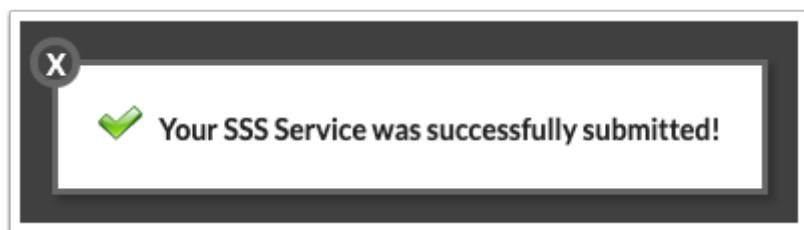
ℹ️ If the service must be approved according to the SSS Services approval flow, the pop-up will state "Your SSS Service was successfully submitted for approval!" In the Service History tab, the Status column will display as Pending, Approved, Denied, or Sent Back.

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

Submitting a Draft for an Individual Student

1. Click the **Drafts** tab.

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.

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

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

> **ⓘ** 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.

Submitting a Group Draft

1. Click the **Groups** tab.

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

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

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

Your SSS Service was successfully submitted!

> **ⓘ** 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.

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 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.

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.

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

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

11. Click **Edit**.

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

After re-submitting the service, a pop-up will display indicating the service was successfully submitted.
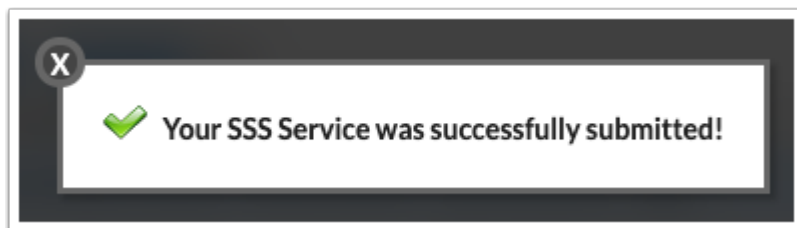
> 🛈 If the service must be approved according to the SSS Services approval flow, the pop-up will state "Your SSS Service was successfully submitted for approval!" In the Service History tab, the Status column will display as Pending, Approved, Denied, or Sent Back.

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.

🛈 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.

🛈 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	✖
☐	10/26/2022	Castillo, Heather	00076169	Focus Elementary School - 0311	7.5 units	✖
					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.

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

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.
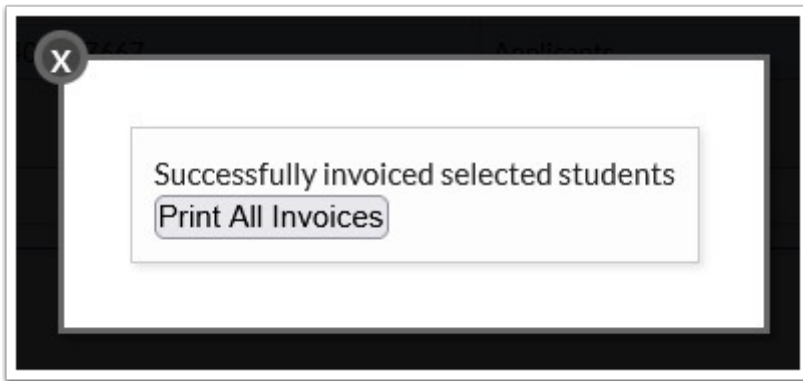
5. Click **Bill**.

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.

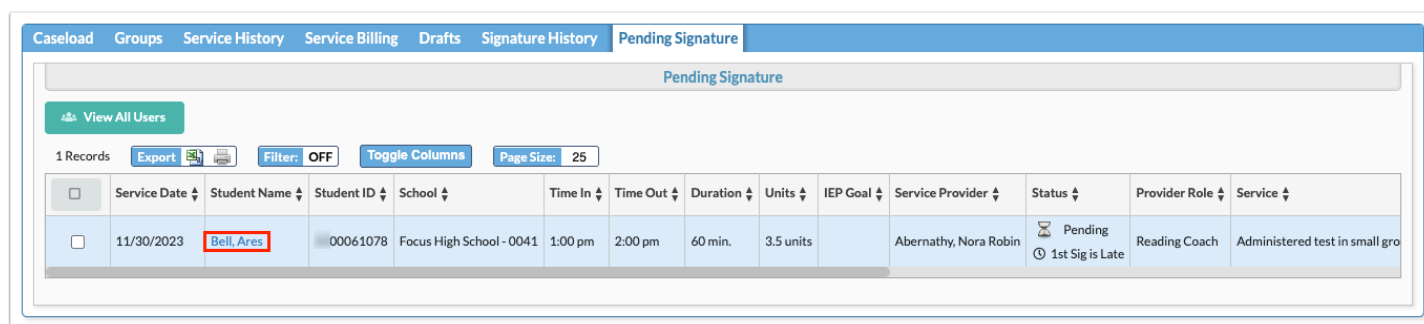**1.** Click the **Pending Signature** tab on the Caseload & Services screen.
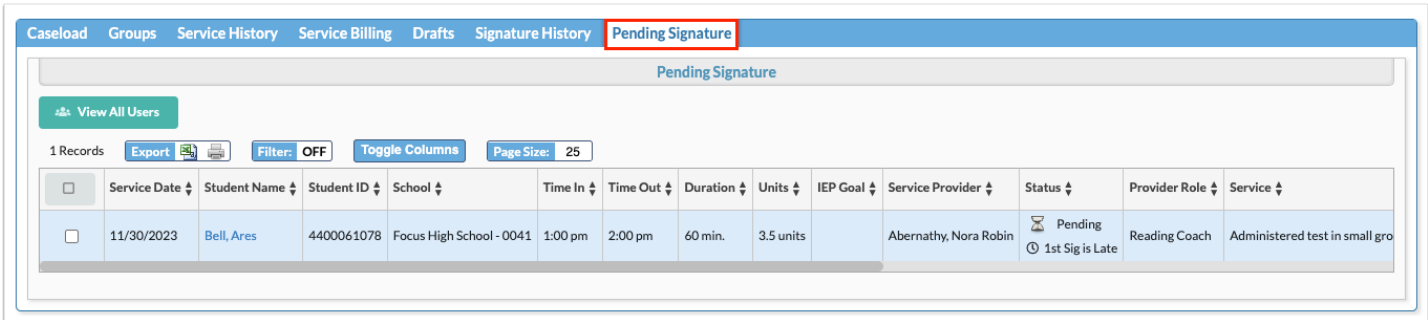
Alternatively, users in the approval chain can click the Portal alert "SSS Service signature request awaiting approval" to open the Pending Signature tab of the Caseload & Services screen.
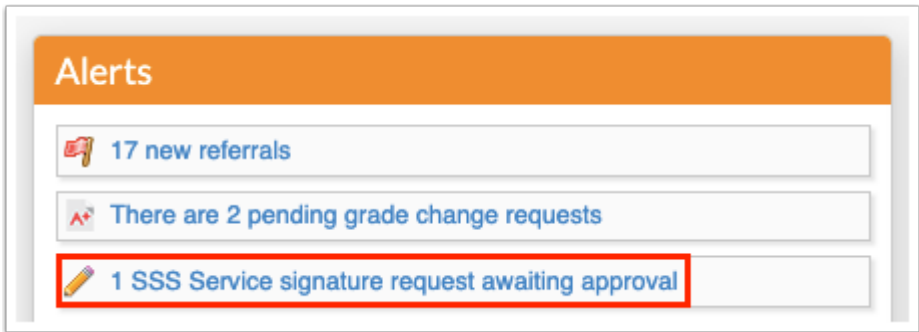
The service records pending approval are listed.

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

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

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.

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.

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.