

Service Tracker



Benefits

- Quickly and easily document delivery of services
- Real time analysis on delivery of services
- Service tracker alleviates double entry
- Real Time Data
 - As data is entered into SEIS, it will generate up-to-date registers and reports
- The Service Tracking feature allows users to enter the amount of time they delivered each service
 - Because this is done through SEIS, all pertinent information such as services on the IEP, Caseloads, Provider Types, and Service Frequency / Duration information is already in place
- This feature monitors the total amount of minutes provided to the student and can report to districts, when services are being over-delivered or under-delivered
- Admin users can access DNQ/Exited Students for delivering services and assessments for providers
- **Automated export of data to SEIS Billing for LEA Medi-Cal Reimbursement**



Contact

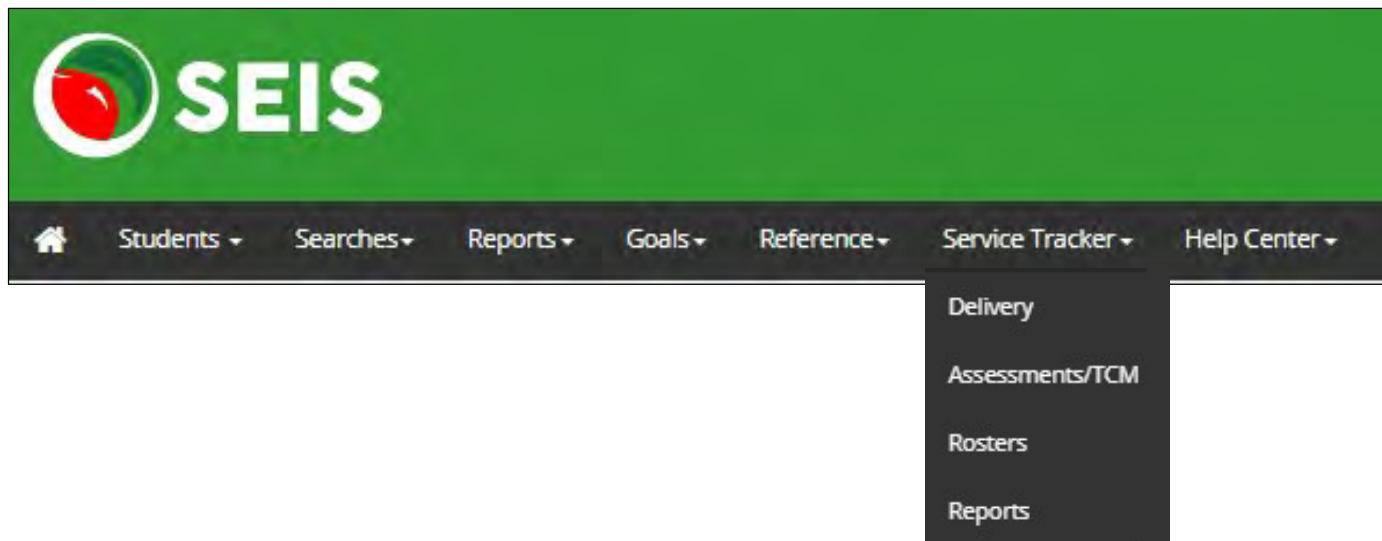
1.866.468.2891

<http://beta.seis.org>

Menu Options

Click on **Service Tracker** from the upper navigation bar

Use the Service Tracker drop down to navigate between **Deliveries**, **Assessments**, **Rosters** and **Reports**



Delivery Summary Page

Filter your results.

Filters include
Name, Service
Code, School,
Eligibility, and
Frequency

-  View IEPs List Page
-  View Student Profile
-  Deliver Service

Deliveries

Filter

Last Name:

First Name:

School of Attendance:

Eligibility:

Service Code:

Minutes/Session:

☐ Don't Include Ended Services

Service Type:

Show All Find

Groups:

Build Delivery To Group Add to Group Manage Groups

Search Results

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z A-Z

Show 50 per page Displaying 1 to 50 of 160 record(s)

Actions	Name	Service	Start Date	End Date	Sessions / Frequency	Total Minutes (min/year)	Total Delivered
  	Dear, John	330 Specialized Academic Instruction (IG)	01/01/2015	01/01/2016	60 min Daily	21900 min/year	30/21900
  	Demo, PA	330 Specialized Academic Instruction (IG)	06/03/2016	06/03/2017	60 min x 5 Times = 300 min Weekly	15600 min/year	110/15600

Service Information pulls from the Future IEP

Total Delivered calculates the total minutes that have been delivered vs. the total minutes needed for the IEP year.



Contact
1.866.468.2891
<http://beta.seis.org>

Delivered Services

Clicking the **Delivery** icon will display all deliveries for that Service

Click the **Add Service** button to add a new delivery

Service Tracker – Deliveries										
Name: Jones Ellison Birthday: 03/19/1998		Add Service Cancel								
	Date	Attendance Code	Delivery	Minutes Delivered	District to Bill	School of Attendance	Date Added	Last Modified By		Billed
   	09/19/2017	Delivered	Individual	0	Demo Unified	Demo Roosevelt	09/25/2017 Caseload12 Caseload12	Caseload12 Caseload12 09-25-2017 08:51 AM		✕
   	09/18/2017	Delivered	Individual	0	Demo Unified	Demo Roosevelt	09/25/2017 Caseload12 Caseload12	Caseload12 Caseload12 09-25-2017 08:51 AM		✕

 Edit delivery  Delete delivery  View comments  View case notes



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Adding a Delivery

The screenshot shows the SEIS 'New Delivery' form. At the top, there's a green header with the SEIS logo and navigation tabs: Students, Searches, Reports, Goals, and Reference. A calendar for September 2017 is open, showing dates from 1 to 30. The form fields include:

- Visit Date(s):** A date selection field with a callout: "Select up to 10 days at a time for delivery".
- Attendance Code:** A dropdown menu with a callout: "Select the student's Attendance Code".
- Diagnostic Code:** A text field with the value "F80.9 SLP Register Treatment".
- District to Bill:** A dropdown menu with the value "Gleno Unified".
- Written prescription on file?** Radio buttons for "Yes" and "No".
- Plan Type:** Radio buttons for "IEP" and "IFSP".
- Delivery:** Radio buttons for "Individual", "Group", and "Consult". Below these are options for "Individual - Telehealth (Speech ONLY)" and "Group - Telehealth (Speech ONLY)".
- Total Minutes Provided:** A text field.
- School of Attendance:** A dropdown menu with the value "Demo Roosevelt".
- Comments:** A large text area with a callout: "Leave any comments as necessary".
- Save/Cancel buttons:** At the bottom right, with a callout: "Click the Save button to Save your Delivery".

Additional callouts on the right side of the form:

- "Fill in Plan Type, Delivery, Total Minutes Provided, and District to Bill"
- "Diagnostic Code and School of Attendance will default automatically"
- "Leave any Case Notes as necessary"



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1.866.468.2891
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Bulk Delivery

Filter

Last Name: First Name: Service Code: 415 Language and speech:

School of Attendance: Eligibility: Minutes/Session:

☐ Don't Include Ended Services

Service Type:

Search Results

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z A-Z

Show 30 per page Displaying 1 to 50 of 160 records

Actions	Name	Service	Start Date	End Date	Sessions / Frequency	Total Minutes (min/year)	Total Delivered
  	Dear, John	330 Specialized Academic Instruction (IG)	01/01/2015	01/01/2016	60 min Daily	21600 min/year	30/21600

Start by setting up a group
Click the **Bulk Delivery** icon



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Creating a new Group



Click **Add Group** to add a new Group

Creating a new Group



The screenshot shows the SEIS 'Edit Service Group' form. The form has a green header with the SEIS logo and navigation links. The main form area is white and contains three input fields: 'Group Name:', 'Service Code:', and 'Delivery:'. Below the 'Group Name' field are 'Cancel' and 'Save' buttons. Below the 'Service Code' field is a dropdown menu with the text '---Select One---'. Below the 'Delivery' field is a dropdown menu. Four green callout boxes with arrows point to the form fields: one to the 'Group Name' field, one to the 'Save' button, one to the 'Service Code' dropdown, and one to the 'Delivery' dropdown.

SEIS

Students • Searches • Reports • Goals • Reference • Service Tracker • Help Center •

Caseload12 Caseload12 - Teacher • Log Out

Edit Service Group

Return to Helpdesk Upload Guide

Group Name: Service Code: Delivery:

Cancel Save

---Select One---

Enter a
Group Name

Click **Save** to
add the new
Group

Select a Service
Code

Select Delivery
Type

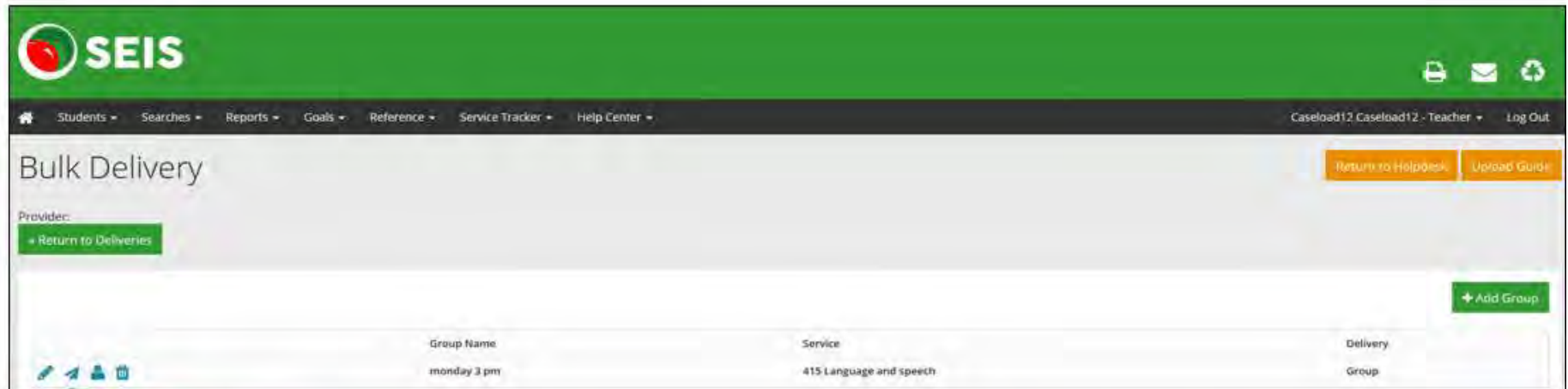


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Group Options



The screenshot shows the SEIS Bulk Delivery interface. At the top is a green header with the SEIS logo and navigation icons. Below the header is a dark navigation bar with links like Students, Searches, Reports, Goals, Reference, Service Tracker, and Help Center. The main content area is titled 'Bulk Delivery' and includes a 'Provider:' section with a '+ Return to Deliveries' button. A table displays group information with columns for Group Name, Service, and Delivery. The first row shows 'monday 3 pm' for Group Name, '415 Language and speech' for Service, and 'Group' for Delivery. Action icons (pencil, paper plane, person, trash) are located at the bottom left of the table. A green '+ Add Group' button is on the right. A callout box points to the action icons.

Group Name	Service	Delivery
monday 3 pm	415 Language and speech	Group

-  Edit Group Name / Info
-  Bulk Deliver to Group
-  Manage Students in Group
-  Delete Group

Adding Students to a Group

The student list is filtered by the Service Code for the Group

All students in to the group will display here

Click the **Return to Bulk Delivery** button to return to the Bulk Delivery page

Check the box next to the students to be added to the group, then click the **Add to Group** button

Manage Service Group Students

Group Name: Monday 3 pm
Service: 415 Language and speech
Delivery: Group

Student	Birthdate	Grade	District of Service	Attendance School	
☐	Richard Castle	07/01/2000	Twelfth grade	Kirstins District 1	Spartan High

Return to Bulk Delivery
Delete Students

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z A-Z

Show 50 per page Displaying 1 to 4 of 4 record(s)

Actions	Name	Service	Delivery	Start Date	End Date	Sessions / Frequency	Total Minutes (min/year)	Total Delivered
☐	Castle, Richard	415 Language and speech	IJ	10/10/2017	10/10/2017	100 min Monthly	100 min/year	0/100
☐	Castle, Richard	415 Language and speech	GJ	10/12/2017	10/12/2018	60 min Weekly	3120 min/year	514/3120
☐	Donovan, Landon	415 Language and speech		03/13/2018	03/13/2019	30 min x 2 Times = 60 min Weekly	3120 min/year	75/3120
☐ Check/Uncheck All	Name	Service	Delivery	Start Date	End Date	Sessions / Frequency	Total Minutes (min/year)	Total Delivered

Add to Group

Bulk Delivering to a Group



The screenshot shows the SEIS Bulk Delivery interface. At the top is a green header with the SEIS logo and navigation icons. Below this is a dark grey navigation bar with links: Students, Searches, Reports, Goals, Reference, Service Tracker, and Help Center. On the right of the navigation bar, it says 'Caseload12 Caseload12 - Teacher' and 'Log Out'. The main content area is titled 'Bulk Delivery' and includes a 'Provider:' section with a 'Return to Deliveries' button. Below this is a table with columns: Group Name, Service, and Delivery. The first row shows 'monday 3 pm' under Group Name and '415 Language and speech' under Service. A '+ Add Group' button is in the top right of the table area. A green callout box with an arrow points to a 'Bulk Deliver' icon (a person with a plus sign) in the bottom left of the table, with the text 'Click Bulk Deliver icon to Bulk Deliver to a Group'.

SEIS

Students • Searches • Reports • Goals • Reference • Service Tracker • Help Center •

Caseload12 Caseload12 - Teacher • Log Out

Bulk Delivery

Provider:

[Return to Deliveries](#)

[Return to Helpdesk](#) [Upload Guide](#)

[+ Add Group](#)

Group Name	Service	Delivery
monday 3 pm	415 Language and speech	Group

Click Bulk Deliver icon to Bulk Deliver to a Group

Bulk Deliver to Group

Bulk Delivery to Group

Group Name: [Text Field]

Service: 415 Language and speech

Delivery: Group

Visit Date: 07/03/2018

Attendance Code: Delivered

Plan Type: IEP (selected) JFSP

District to Bill: Demo Unified

Total Minutes Provided: 30

NPI: [Text Field] **Find NPI Provider**

Diagnostic Code: F80.9 SLP Register Treatment

Comment: [Text Area]

I certify under my professional license/credential, the documented services have been performed. I understand that it is my sole responsibility to maintain a hard copy record with my signature according to the Business and Professions Code regulations through participation in the LEA Medi-Cal Billing Option.

Save

Select one delivery date

National Provider Identification Number of referring physician must be entered to be billed

Leave any comments as necessary

Fill in Plan Type, District of Service, Attendance Code, and Total Minutes Provided

Written Prescription on File (only for OT and PT services)

Diagnostic Code information will default automatically

Click the **Save** button to Save your Delivery



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Editing a Bulk Delivery

Return to Bulk Deliveries							
Student ID	Name	DOB	Service Code	Delivery	Start Date	End Date	Result
965284	zany zebra	08/01/2002	415 Language and speech		09/16/2012		Service Type does not match the group's Delivery Type
 1583337	andrea piro	12/06/2005	415 Language and speech	I	08/29/2017		Successfully delivered
 556538	Hannah Alexandria	12/31/2009	415 Language and speech	I	04/19/2017		Successfully delivered

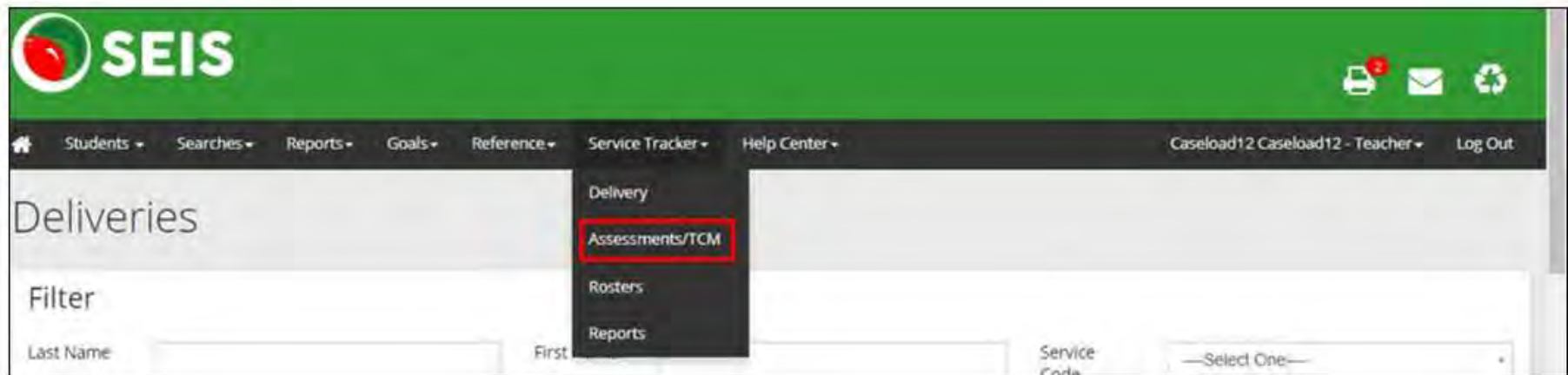
To edit an bulk delivery for a specific student, click the Edit icon

Services will be validated according to the IEP and the **Result** will appear.

Assessment Tracking

Click the **Service Tracker** section of the upper navigation bar.

Click the **Assessments** tab.



Assessments

Filter

Last Name:

School of Attendance:

Eligibility:

Filter down results displayed below.
Filters include:
Name, School, Eligibility and Service Type

First Name:

Service Type:

Show All

Find

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z A-Z

Show 50 entries

Search:

Actions	Name	* District of Service	School of Attendance	Referral Date	Last IEP	Last Annual	Last Evaluation
	Ackerman, Marjoram	Kirstins District 1	Cristys Fun School	09/04/2011	03/20/2018	03/08/2018	03/08/2018



Deliver Assessment



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Adding an Assessment

Assessments

Download

Print

Click the **Add Assessment** button to add a new Assessment

Assessments

Name: Denise Davis
Birthday: 05/08/1992

Add Assessment

Cancel

Date	Assessment	Plan Type	Delivery	District to Bill	School of Attendance	Provider Name	Date Added	Last Modified By	Billed
09/14/2016	2 - Annual Assessment	IEP	Individual	Demo Unified	Demo Lincoln	Caseload2 Caseload2	09/20/2016 Caseload2 Caseload2	Caseload2 Caseload2 09-20-2016 01:40 PM	✕

Adding an Assessment

Edit Assessment

Provider: Caseload12 Caseload12
[Return to Provider Dashboard](#)

New Assessment

Assessment Date: * 

Plan Type: * ☒ IEP ☐ IFSP

Assessment: * 1A - Initial Assessment/Evaluation of Speech Flu. ▼

Delivery: * ☒ Individual ☐ Group ☐ Consult
☐ Individual - Telehealth (Speech ONLY)
☐ Group - Telehealth (Speech ONLY)

Diagnostic Code: F80.9 SLP RegisterTreatment

District to Bill: * Demo Unified ▼

School: Demo Lincoln

Comments

I certify under my professional license/credential, the documented services have been performed. I understand that it is my sole responsibility to maintain a hard copy record with my signature according to the Business and Professions Code regulations thru the participation in the LEA Medi-Cal Billing Option.

Save Cancel

Select the
Assessment
Date

Select Plan Type,
Assessment Type,
and District to Bill

Leave
comments as
necessary

Delivery, Diagnostic
Code and School
will default to what
is on the IEP

Click **Save** to
save the
assessment

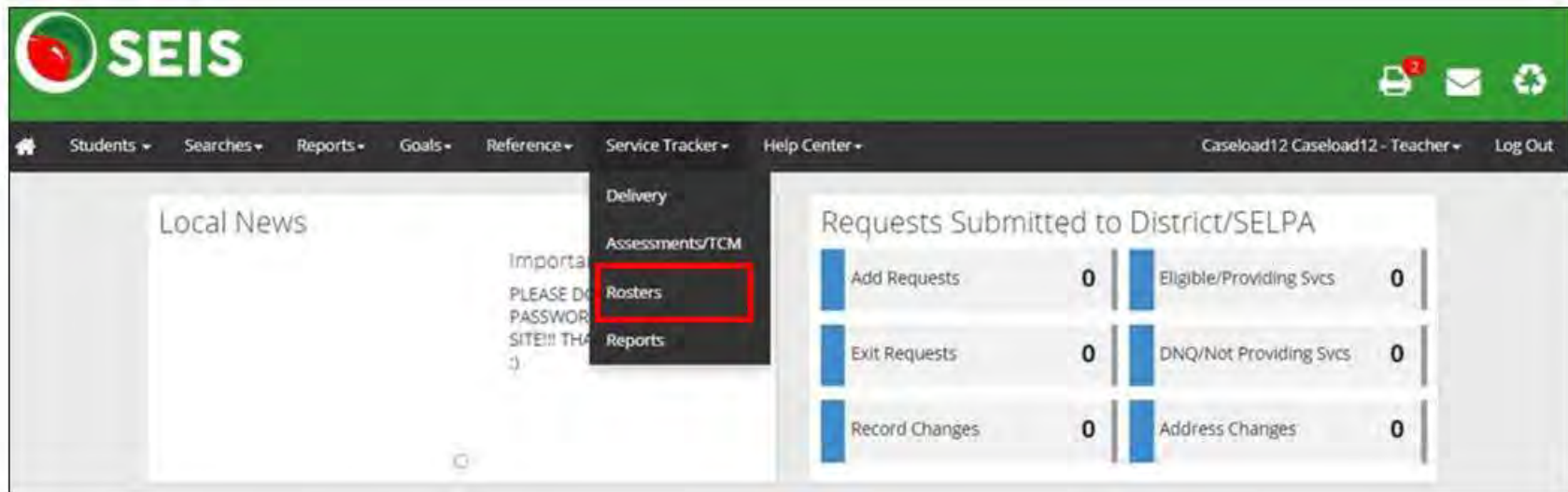


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Rosters

Click the **Service Tracker** section of the upper navigation bar

Click on **Roster**



Rosters

Pull an Attendance Roster for the selected month and selected student(s)

Print the **Roster** each month and turn into your district administrator

This will include the information input into the Service Tracking feature

Select the month and year. Roster will default to all students unless specific students are selected

The screenshot shows the 'Rosters' application interface. At the top is a 'Roster Lookup' section with several input fields: 'Last Name', 'First Name', 'Eligibility' (a dropdown menu), 'Month/Year' (a dropdown menu), 'School' (a dropdown menu), 'Service Type' (a dropdown menu), 'Age' (a dropdown menu), and 'Sort' (a dropdown menu). Below these fields are two green buttons: 'Show All' and 'Print'. Below the 'Roster Lookup' section is a 'Students' section with a table of student information. The table has columns for 'Check/Uncheck', 'Last Name', 'First Name', 'DOB', 'Gender', and 'District of Service'. There are three rows of student data.

Check/Uncheck	Last Name	First Name	DOB	Gender	District of Service
☐	David	David	06/06/1992	Female	Green Unified
☐	Dee	Dee	06/06/0000	Male	Green Unified
☐	Dejane	Dejane	06/06/1992	Female	Green Unified

Click the green **Print** button to produce roster

Rosters

Printed **Rosters** pull the information input into the Service Tracking feature and look like this.

Register Period
Teacher Name

Student **Teacher**
Comments **Comments**

Attendance Codes

D Delivered
A Excused absence
E Early student arrival
N Non-Participation
M IEP Absent
P Pardon Absent

X Non-scheduled time
U Unexcused absence
L Last term of student's enrollment
W School Holiday
C Compensatory Time

Attendance Register

Student	DOB	M/F	District of Residence	Student ID	Attendance																												Total			
					M 1	T 2	W 3	T 4	F 5	S 6	S 7	M 8	T 9	W 10	T 11	F 12	S 13	S 14	M 15	T 16	W 17	T 18	F 19	S 20	S 21	M 22	T 23	F 24	S 25	S 26	M 27	T 28				
James Wilson	1/1/1985	M	Glenview	123456	Service	D			D	D	D																									
					Delivery	Group			Group	Group	Group	Individual																								
					Code	415			415	415	415	415																								
					Minutes	30			30	30	30	30																								
						D			D	D	D																									
					Intermittent	415			415	415	415	415																								
Jane Smith	1/1/2000	M	Glenview	789012	Service	D			D																											
					Delivery	Group			Group																											
					Code	415																														
					Minutes	30																														
						D																														
					Intermittent	415																														
John Doe	7/6/1995	M	Glenview	345678	Service	D			D																											
					Delivery	Group			Group																											
					Code	415																														
					Minutes	30																														
						D																														
					Intermittent	415																														

CERTIFICATION

TO THE BEST OF MY KNOWLEDGE AND BELIEF THIS STATE SCHOOL RECEIVES PAGE HAS BEEN KEPT AS REQUIRED BY LAW AND IN ACCORDANCE WITH THE INSTRUCTION OF THE SUPERINTENDENT OF PUBLIC INSTRUCTION.

Signature _____

Subscribed _____



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1.866.468.2891
<http://beta.seis.org>

Reports

Reports will pull specific information for the date range selected and student(s) selected.

The screenshot shows the 'Download Reports' interface. It includes a 'Type of Report:' dropdown menu with options: Deliveries, Overdelivered, Absences, Unscheduled time, Assessments, TCM, and Deliveries with Case notes. A callout points to this menu, stating: 'Select the type of report from the pull-down menu as well as a start and end date'. Below the menu is a 'Students' section with a 'Show 50 entries' button. To the right, there are 'For:' and 'End Date:' fields. A callout points to the 'For:' field, stating: 'Report will default to all students unless specific students are selected'. The 'For:' field currently shows 'All Students'. At the bottom right is a green 'Download Report' button. A callout points to this button, stating: 'Click the **Download Report** button to produce report'. There is also a 'Start Date:' field and a 'Search:' field.

Download Reports

Type of Report:

Start Date:

For: All Students

End Date:

Download Report

Search:

Students

Show 50 entries

Select the type of report from the pull-down menu as well as a start and end date

Report will default to all students unless specific students are selected

Click the **Download Report** button to produce report

Reports

Type of Reports

- These are the available reports offered through Service Tracking:
 - **Deliveries** – shows all of the services delivered for the student(s) by a provider.
 - **Overdelivered** – shows any student / service where the total minutes delivered is above the number of minutes written into the IEP.
 - **Absences** – shows all service deliveries that were not delivered due to a student's absence.
 - **Unscheduled Time** – shows all deliveries marked as unscheduled time.
 - **Assessments** – will pull assessments entered.
 - **Deliveries with Case Notes** – shows all of the services delivered with case notes for student(s) by a provider.

Reports

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	SEIS ID	LastName	FirstName	Date of Delivery	Service Code	Attendance	Minutes Delivered	DiagCode	DiagDesc	District	School	Provider	Delivery
2	379238	Price	Max	5/1/2019	415 D		20 F80.9	SLP RegisterTreatment	Demo Unified	School of Rock	Caseload12	Caseload12	G
3	859132	Artesian	John	7/2/2019	415 D		30 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	I
4	859132	Artesian	John	7/10/2019	415 D		30 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	I
5	859132	Artesian	John	7/24/2019	415 D		30 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G
6	859132	Artesian	John	7/24/2019	415 D		20 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G
7	859132	Artesian	John	8/1/2019	415 D		30 F80.9	SLP RegisterTreatment	Amador Training District	Gateway Elementary	Caseload12	Caseload12	G
8	859132	Artesian	John	7/23/2019	415 D		15 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G
9	859132	Artesian	John	8/2/2019	415 D		30 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G
10	859132	Artesian	John	8/5/2019	415 A		15 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G
11	859132	Artesian	John	8/7/2019	415 X		15 F80.9	SLP RegisterTreatment	Awesome Elementary	Gateway Elementary	Caseload12	Caseload12	G
12	859132	Artesian	John	8/8/2019	415 A		60 F80.9	SLP RegisterTreatment	Amador Training District	Gateway Elementary	Caseload12	Caseload12	G
13	859132	Artesian	John	8/14/2019	415 D		15 F80.9	SLP RegisterTreatment	Awesome Elementary	Gateway Elementary	Caseload12	Caseload12	G
14	859132	Artesian	John	8/26/2019	415 D		30 F80.9	SLP RegisterTreatment	Amador Training District	Gateway Elementary	Caseload12	Caseload12	G
15	859132	Artesian	John	9/3/2019	415 A		45 F80.9	SLP RegisterTreatment	Demo Element.	Gateway Elementary	Caseload12	Caseload12	G
16	1031566	Mitchell	Sandy	8/7/2019	415 D		45 F80.9	SLP RegisterTreatment	Amador Training District	Gateway Elementary	Caseload12	Caseload12	I
17	1031566	Mitchell	Sandy	8/7/2019	415 D		60 F80.9	SLP RegisterTreatment	Amador Training District	Gateway Elementary	Caseload12	Caseload12	I
18	1031566	Mitchell	Sandy	9/2/2019	415 D		15 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G
19	1031566	Mitchell	Sandy	9/3/2019	415 D		15 F80.9	SLP RegisterTreatment	Demo Element.	Gateway Elementary	Caseload12	Caseload12	G
20	1031566	Mitchell	Sandy	8/23/2019	415 A		15 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G
21	1031566	Mitchell	Sandy	8/9/2019	415 D		60 F80.9	SLP RegisterTreatment	Amador Training District	Gateway Elementary	Caseload12	Caseload12	I
22	1031566	Mitchell	Sandy	8/5/2019	415 D		30 F80.9	SLP RegisterTreatment	Amador Training District	Gateway Elementary	Caseload12	Caseload12	G
23	1031566	Mitchell	Sandy	8/6/2019	415 D		60 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	I
24	1031566	Mitchell	Sandy	8/6/2019	415 D		30 F80.9	SLP RegisterTreatment	Amador Training District	Gateway Elementary	Caseload12	Caseload12	G
25	1031566	Mitchell	Sandy	8/7/2019	415 U		10 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	I
26	1031566	Mitchell	Sandy	8/2/2019	415 U		15 F80.9	SLP RegisterTreatment	Awesome Elementary	Gateway Elementary	Caseload12	Caseload12	G
27	1031566	Mitchell	Sandy	8/5/2019	415 U		10 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	I
28	1031566	Mitchell	Sandy	7/23/2019	415 D		60 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G
29	1031566	Mitchell	Sandy	8/1/2019	415 D		30 F80.9	SLP RegisterTreatment	Awesome Elementary	Gateway Elementary	Caseload12	Caseload12	I
30	1031566	Mitchell	Sandy	7/25/2019	415 D		60 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G
31	1031566	Mitchell	Sandy	7/30/2019	415 D		60 F80.9	SLP RegisterTreatment	Demo Unified	Gateway Elementary	Caseload12	Caseload12	G

Thank you!

Email questions to:

Seissupport@sjcoe.net

McKenzie Luis
mluis@sjcoe.net



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