

ECATS™ Service Documentation Quick Reference Card

Logging In

- To login to ECATS, go to the EdCloud/IAM portal and select the icon for ECATS.
- If you do not have a login to EdCloud/IAM, you need to claim your account. Contact your local data or technical manager to do so.

Main Menu & Messages

- The Main Menu Announcements can be used by your district and Public Consulting Group to post messages and add information regarding updates or scheduled site maintenance.
- The Resources section at the bottom of the page has school district and PCG reference materials that you can download.
- The "Send Us a Message" link is the most secure way to ask questions, give suggestions, or report issues. Simply click on the "Send Us a Message" link at the top of the page and fill out the information required in the web form that appears. This will create a "ticket" for your question or issue.
- Due to HIPAA requirements, please always use ECATS Messages when needing to exchange confidential information. *DO NOT use email to send student information.*
- To review submitted messages, click on the Message Board link and use the "Login to Zendesk" button. This will take you to the Help Center, where your tickets can be reviewed, and correspondence from ECATS agents related to your question will be displayed.

Caseload Setup

From the Main Menu page, click the Wizards tab and select the *Caseload Setup Wizard*. Select the Users Caseload Domain as Special Education and select Go to Users Caseload.

- To add students to your caseload: Select the "Add more Students to Caseload" button.
- Search for the student(s) you would like to add to your caseload. For best results, make the search as broad as possible.
- Click on "View Students."
- The related service you provide will automatically be selected on the right side of the screen (i.e. PT, OT, etc.). Do not uncheck this box.
- Check the Team Member or Case Manager check box next to the student(s) you would like to add to your caseload.
- Click "Add Students to Caseload." The students will be added to your caseload, along with the related service you provide.

To remove students from your caseload:

- Go to the Caseload Setup Wizard.
- Uncheck the Team Member or Case Manager check box next to the student(s) you would like to remove from your caseload.
- Click the "Update the Database" button. This will remove all of the students you selected.

Important note: Remember to add all of your students to your ECATS caseload. Your ECATS caseload should always reflect your actual caseload.

Wizards: Document Individual Student Services

- Log in to ECATS.
- Click the Wizards tab.
- Click the Logging Wizard for the service that you provide.
- Click on the students for whom you wish to document services.
Note: If there is a student not showing up in the Logging Wizard that is on the user's caseload, this means that the corresponding related service has not been added yet for that student.
- You can click the ⓘ info button to see more details about that student's record.
- Click 'Launch Wizard.'

- On the left side of the page, you'll see a sidebar with all students selected on the previous page. Selecting a student in this sidebar will automatically scroll down the page to the corresponding student. The student you are documenting on will be highlighted in green on the left side of the screen.
- Before logging, you may wish to review previous log entries. Clicking on the plus sign next to an entry will show you the log previously completed for a specific date of service.
 - The Previous Log Entries field will display up to 50 records at a time. To view entries older than the last 50, you can use the search icon to search for logs by a date range.
- If you wish to "prefill" the new log with information from a similar log entry previously provided, selecting the *Prefill* image will complete "Service Type," "Group Size," "Progress Report," and "Areas Covered/Assessed"
- Required log components for all treatment entries include: Service Date, Service Type, Duration of Service, Group Size, Location, Areas Covered/Assessed and the Comments section. Required fields are highlighted in red and notated as (Required)
- After documenting the service click "Save" to save and continue.
- Carefully review the Confirm Log Entry screen.
 - If all information is correct you may select Confirm, which will save the service and allow you to return to the top of the logging wizard, enter more logs for this student, or return to the Student Selection page.
 - If the information is not correct, you may select Edit: which will allow you to make corrections on the entry. You may also choose to select Delete if you do not wish to submit the log that was completed
- Once a service has been confirmed, it cannot be edited, just deleted and reentered so please ensure that all information is correct before submitting a service.
- Repeat these steps until you have documented all services.

Wizards: Document Group Student Services

The "Group Logging Wizard" provides a quick way to log group services for students you served in a group therapy setting at the same time, or for students that were seen on the same day with similar details that you wish to document at the same time.

- Click the Wizards tab.
- Click the Logging Wizard for your service discipline
- You should now see a list of students from your caseload. Select the students for whom you would like to log on at the same time. At this point you may either select Launch Wizard or for future use, at the top right hand corner of the screen is a "Groups" button which gives you the option to "Create Group From Selected Students". You can name the group, and when that group is selected in the future those students are preselected.
 - To edit a group's members, select the group, update your selections to reflect the group's current composition, and then select "Save Changes To Current Group." You can also "Delete Current Group" or "Clear Group Selection".
- After your group has been selected and Launch Wizard has been selected, in the top right corner of the screen is the option for "Group Logging". Complete as many or as few of the fields as desired including: Service Date, Service Type, Duration, Group Size, Location, and Areas Covered/Assessed. You will have the opportunity to edit any of these fields on the next screen if any of the selections vary from student to student. When you are finished, click "Apply".
- Enter the Progress Reports, Comments, and if necessary, update any other fields for each student. Click "Save" after each individual student or "Save All" to save the group at once. Note: If a student is absent, instead of removing him/her from the group, you can select "Student Absent" from the Service Type dropdown menu.
- On the Confirm Log Entry screen there is the option to either confirm, edit, or delete the entry.

Plan of Care

- Plan of Care (POC) is a document created by the therapist on the steps they're going to take regarding treating and engaging with the student.
- Click on Students tab located on the menu bar.
- Input information to search for the student, and then select "View Students" to select the student. You can also select "View My Caseload" to view all students on your caseload and select the student's name you wish to complete a POC.
- Click on "Plan of Care" tab located in the blue submenu underneath the Students menu on the screen.

- The Student Information section shows general information pertaining to that specific student including IEP dates on file and eligibility.
- In the Plan Information section, select the service type of the student in the "Plan Type" drop down menu; also, enter in the date range for the student's POC. **Please note, you cannot back date a POC to begin before today's date.**
- You will notice that once you input the dates, more fields will populate beneath the Plan Information section that was not previously there. This is the POC workspace.
 - Complete fields by checking appropriate boxes for interventions, treatments, modalities, approaches and procedures. The "other" box fields are for notating information that doesn't have a check box option.
- Once you fill out all the appropriate boxes and comments for the student, you can save your work by selecting Save, or create the POC by selecting create a Draft Document or Final Document at the bottom of the page under the "Confirm Plan" section
 - If you are serving under the POC created by another therapist, you can select "I have reviewed, understand, and am serving under the existing Plan of Care/Treatment Plan" prior to creating a final document with your own credentials and signature date.
- Located at the very bottom of the screen under "Documents" shows a list of POCs created by other users for easy access and upkeep.
- Under Scheduled Reports, click "Printable Service Report"
 - Enter a date range of services to print.
 - Enter a student ID (leaving this field blank will print all students on your caseload).
 - If appropriate, select "Page Break between Students."
 - Select "Generate Report."
 - You will receive an email confirmation when the report has been generated.
 - The report will be delivered to your "My Reports" tab where you can view and choose to print. You can access My Reports by hovering over Reporting on the main menu.
- To print services from the Logging Wizard:
 - Access the logging wizard, select a student, and navigate to the previous log entries section
 - Select the Print button and a new page will open with notes you can choose to either download or print
 - Under the Search icon you can also select a date range and choose to print the logs from that date range

View Services through Service Log Report

- On the Main Menu, hover over "Reporting" and click on Standard Reports
- Click on "Service Log Reports"
- Complete all fields required:
 - For the Type of Date to Use: choose either Date of Service or Date service was entered into system
 - Select a date range for services you wish to view by entering a Start Date and End Date
 - Select "Order the results by" by selecting a field to sort by choosing Student's Last Name, Date of Logged Service, School Services were Logged at, or Progress under "Order the results by" dropdown
- Click on the "Next" button to continue
- Select a student by clicking on the [blue link](#) on student's name. This will show you a list of the services you provided to that student during the date range you entered.
- Select "View" to review the service provided
- If you want to view the services for another student, click on the back link ([highlighted blue](#)) to bring you back to the student list.

Request a Service Log Deletion

There are two locations to request a Service Log Deletion, either in the Logging Wizards or when reviewing the Service Log Report

- To request a Service Log Deletion in the Logging Wizards:
 - Access the logging wizard, select a student, and navigate to the previous log entries section
 - Expand the entry you wish to delete and select "Request Removal"
 - Enter a brief reason to answer, "Why does this log need to be removed?" and select Request Removal or Cancel if you do not want to delete the entry.
- To request a Service Log Deletion from the Service Log Report follow the instructions listed in "View Services through Service Log Report" section of this information card.
 - Select "View" next to the Date of Service you wish to be deleted.
 - Select "Request Deletion" on the Left Hand of the screen
 - You will be directed to a confirmation screen
 - In the drop-down box marked "Are you sure you wish to request removal of this service log?" choose 'Yes' to have the log deleted
 - Type your reasons for deleting the log in the text box and click on 'Request Log Removal'
 - After you have requested a log removal, the log will display a red **X** in the "Request Removal" column. The **X** will remain until the log has been deleted

Print Services

You can print services by either navigating to Standard Reports or by accessing the Logging Wizard

- To print services from Standard Reports:
 - Hover over Reporting and click on Standard Reports