

**ECATS**

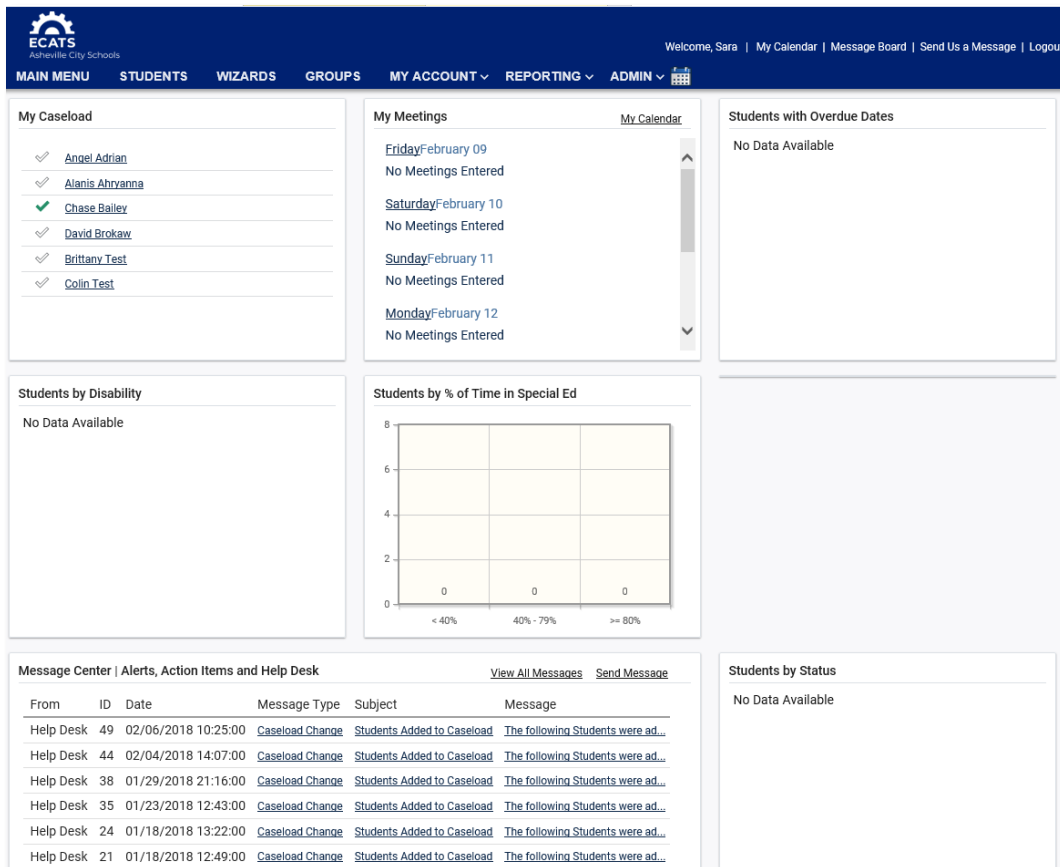
Service Documentation User Manual  
2019

**Please Note: All Student Names and Information used throughout the manual are test students, and are used for illustration purposes only.**

## MAIN MENU

After logging into the ECATS website, the user will be directed to the Main Menu page where they will have access to many resources including announcements and documents.

- 1) The Main Menu page contains several helpful widgets that enable the user to view their caseload, upcoming meetings, and overdue student information. This information is dynamic and reflects live data in the ECATS system. The “Resources” section located at the bottom of the page includes helpful documents and training manuals.

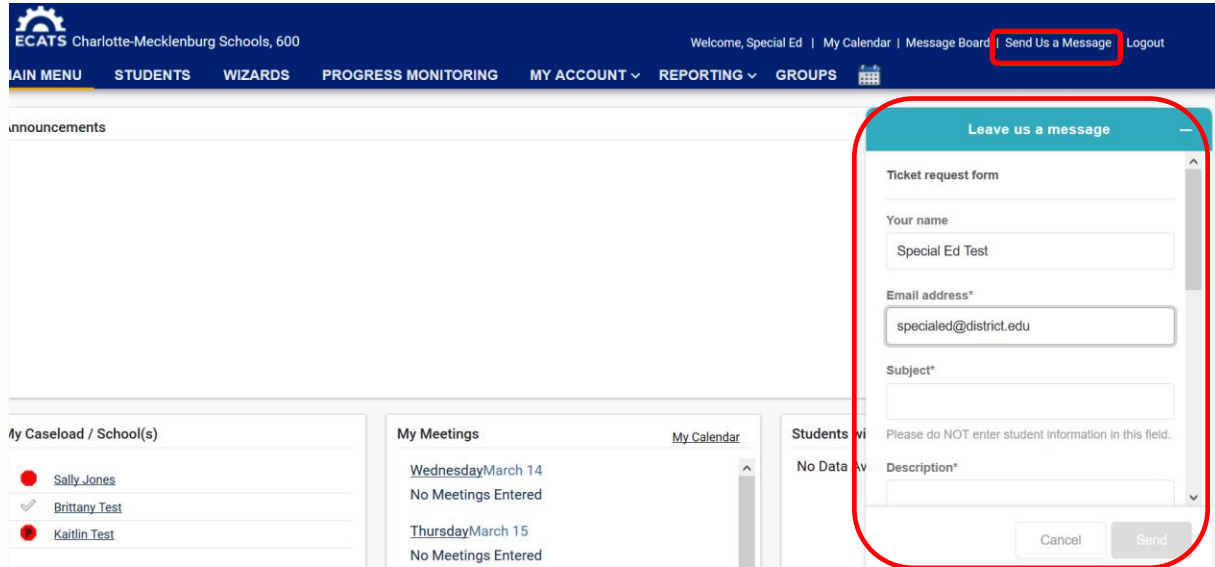


The screenshot shows the ECATS Main Menu dashboard for a user named Sara. The dashboard includes several widgets:

- My Caseload:** A list of students with checkmarks, including Angel Adrian, Alanis Ahrvanna, Chase Bailey, David Brokaw, Brittany Test, and Colin Test.
- My Meetings:** A calendar view showing no meetings entered for Friday, Saturday, Sunday, and Monday of February 9-12.
- Students with Overdue Dates:** A box indicating "No Data Available".
- Students by Disability:** A box indicating "No Data Available".
- Students by % of Time in Special Ed:** A bar chart showing 0% for all three categories: < 40%, 40% - 79%, and >= 80%.
- Message Center:** A table of alerts and action items, all related to "Caseload Change" and "Students Added to Caseload".
- Students by Status:** A box indicating "No Data Available".

From	ID	Date	Message Type	Subject	Message
Help Desk	49	02/06/2018 10:25:00	Caseload Change	Students Added to Caseload	The following Students were ad...
Help Desk	44	02/04/2018 14:07:00	Caseload Change	Students Added to Caseload	The following Students were ad...
Help Desk	38	01/29/2018 21:16:00	Caseload Change	Students Added to Caseload	The following Students were ad...
Help Desk	35	01/23/2018 12:43:00	Caseload Change	Students Added to Caseload	The following Students were ad...
Help Desk	24	01/18/2018 13:22:00	Caseload Change	Students Added to Caseload	The following Students were ad...
Help Desk	21	01/18/2018 12:49:00	Caseload Change	Students Added to Caseload	The following Students were ad...

- 2) Questions/Issues/Suggestions - To inform the Helpdesk of any issue, you can ‘Send Us a Message’ via the link on the ECATS Main Menu page. This will prompt a web form to open that you may use to submit a ticket.



You will be prompted to enter the following ticket fields:

- **Your name** – This will auto populate with your name
- **Email address** – This will auto populate with the email set on your ECATS profile – IMPORTANT: this should NOT be changed when submitting a ticket.
- **Subject** - Enter a subject line (\*required)
- **Description** – Describe your question/issue (\*required)
- **Module** – Select the module that relates to your ticket – Special Education, Service Documentation, MTSS, etc. (\*required)
- **Student** – Enter in a student name, student ID etc., if applicable
- **Page Title** – Indicate the page related to your question/issue
- **Attachment** – Upload attachments to help explain your issue/question

Once the Helpdesk responds to your message, you will receive an e-mail (to the address listed within your ECATS profile) informing you that you have a new message. All messages and responses are sent internally within the system.

- 3) Reviewing previously submitted tickets - You can access previously submitted tickets by logging into ECATS and selecting the “Message Board” link in the top header and then selecting the “Login to Zendesk” button.

ECATS Charlotte-Mecklenburg Schools, 600 Welcome, Special Ed | My Calendar | **Message Board** | Send Us a Message | Logout

MAIN MENU STUDENTS WIZARDS PROGRESS MONITORING MY ACCOUNT REPORTING GROUPS

**Messages** Special Ed Test

This page displays all of the messages you have sent in the ECATS™ system and the responses that you have received. If you have messages you have not read, a "New Messages" section will appear at the top of the page. Below any new messages, a "Previous Messages" section will display all the messages that you have previously sent or received.

[Login to Zendesk](#)

This will bring you to the Help Center. You can then select under your name > My Activities. This will bring up all the tickets you have submitted. From this view under "My requests", you can review ticket status (open, pending or solved), see comments/questions from ECATS Agents, and respond when appropriate.



Sarah Zen Speech

- My activities
- My profile
- Sign out

## My requests

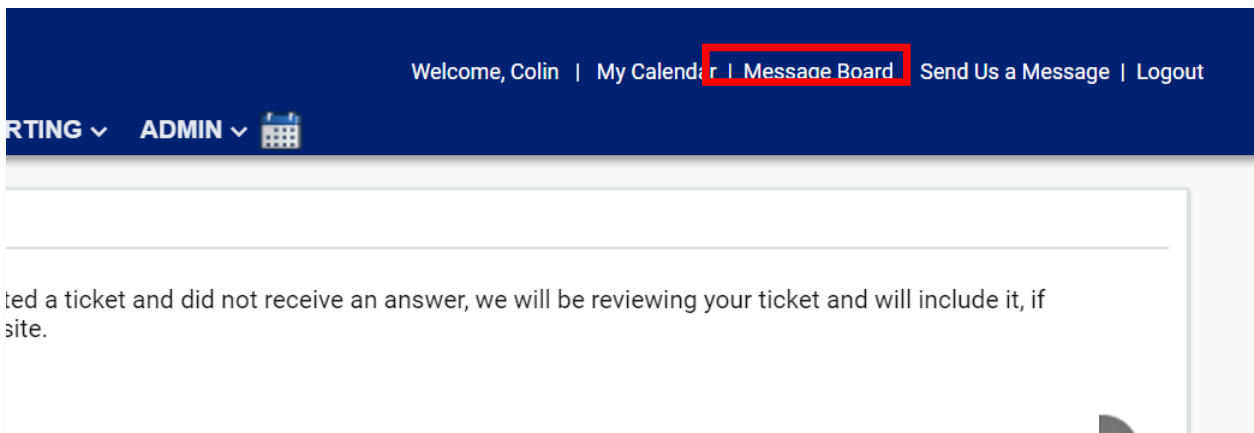
My requests Requests I'm CC'd on

Search requests Status: Any


Subject	Id	Created	Last activity	Status
Symbol Confusion	#139	8 hours ago	1 minute ago	open
Incorrect Dates	#138	8 hours ago	5 hours ago	solved
Speech Services for Sally	#140	8 hours ago	8 hours ago	open

## MY ACCOUNT

- 1) Accessing Messages Related to Alerts - To access a new message related to a system Alert, click on [‘My Messages’](#) on the Main Menu screen or Message Board on the top of the blue Main Menu bar. This will direct you to the following screen, which displays New Messages, as well as stores your Previous Messages. Once you have read all new messages, you will no longer see the ‘New Mail’ icon on your Main Menu screen.



Welcome, Colin | My Calendar | **Message Board** | Send Us a Message | Logout

REPORTING ▾ ADMIN ▾ 

ted a ticket and did not receive an answer, we will be reviewing your ticket and will include it, if site.

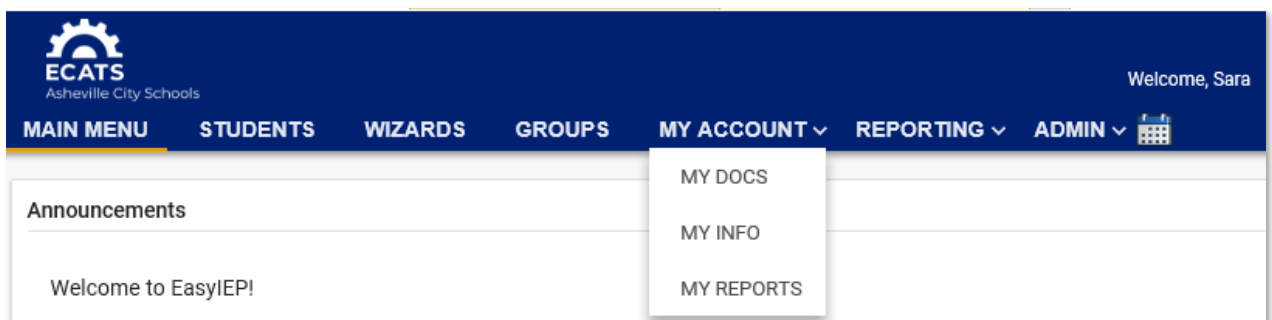
New Messages							
From	ID	Domain	Date	Message Type	Subject	Message	Age (hr:min)
Help Desk	49	General	02/06/2018 10:25:00	<a href="#">Caseload Change</a>	<a href="#">Students Added to Caseload</a>	The following Students were ad...	5 days, 22 hr
Help Desk	44	General	02/04/2018 14:07:00	<a href="#">Caseload Change</a>	<a href="#">Students Added to Caseload</a>	The following Students were ad...	7 days, 18 hr
Help Desk	38	General	01/29/2018 21:16:00	<a href="#">Caseload Change</a>	<a href="#">Students Added to Caseload</a>	The following Students were ad...	13 days, 11 hr
Help Desk	35	General	01/23/2018 12:43:00	<a href="#">Caseload Change</a>	<a href="#">Students Added to Caseload</a>	The following Students were ad...	19 days, 19 hr
Help Desk	24	General	01/18/2018 13:22:00	<a href="#">Caseload Change</a>	<a href="#">Students Added to Caseload</a>	The following Students were ad...	24 days, 19 hr
Help Desk	21	General	01/18/2018 12:49:00	<a href="#">Caseload Change</a>	<a href="#">Students Added to Caseload</a>	The following Students were ad...	24 days, 19 hr

Previous Messages										
From	ID	Domain	Date	Message Type	Subject	Message	To	Read?	Replied?	Age (hr:min)
Speech Test	26	General	01/22/2018 11:08:00	<a href="#">Service Log Rejected</a>	<a href="#">Service Log Rejected</a>	The following service log entr...	Clinician Test	No	No	20 days, 21 hr


[SEARCH MESSAGES](#)

- 2) The “My Account” tab allows users to view documents, user information, and reports.



ECATS Asheville City Schools

Welcome, Sara

MAIN MENU STUDENTS WIZARDS GROUPS **MY ACCOUNT ▾** REPORTING ▾ ADMIN ▾ 

Announcements

Welcome to EasyIEP!

MY DOCS  
MY INFO  
MY REPORTS

- 3) Within the “My Account” tab, you can view personal user information by clicking “My Info.” This information is read-only.

Name: Clinician Test

User Name: ctest

User Code: TEST9183458891

Title: Test User

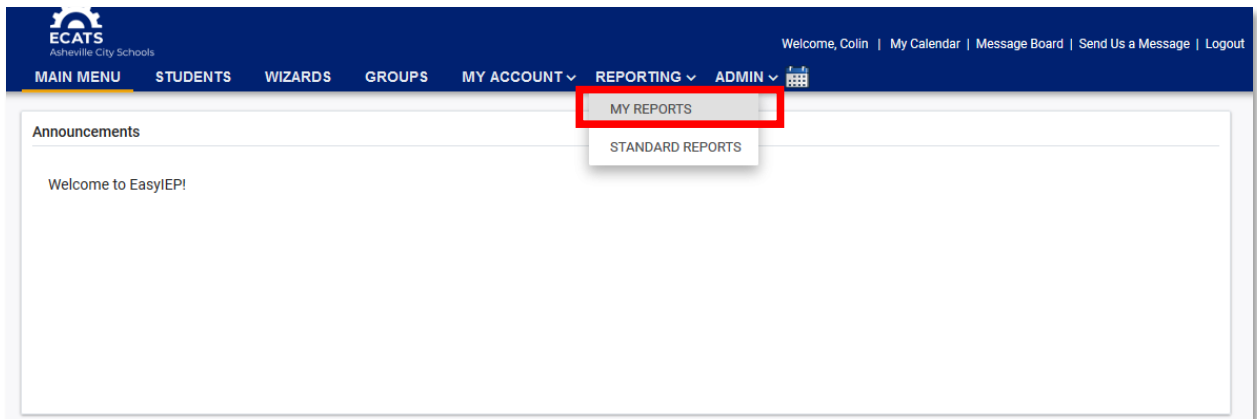
Address:

City, State, ZipCode:

Home Phone:

Work Phone:

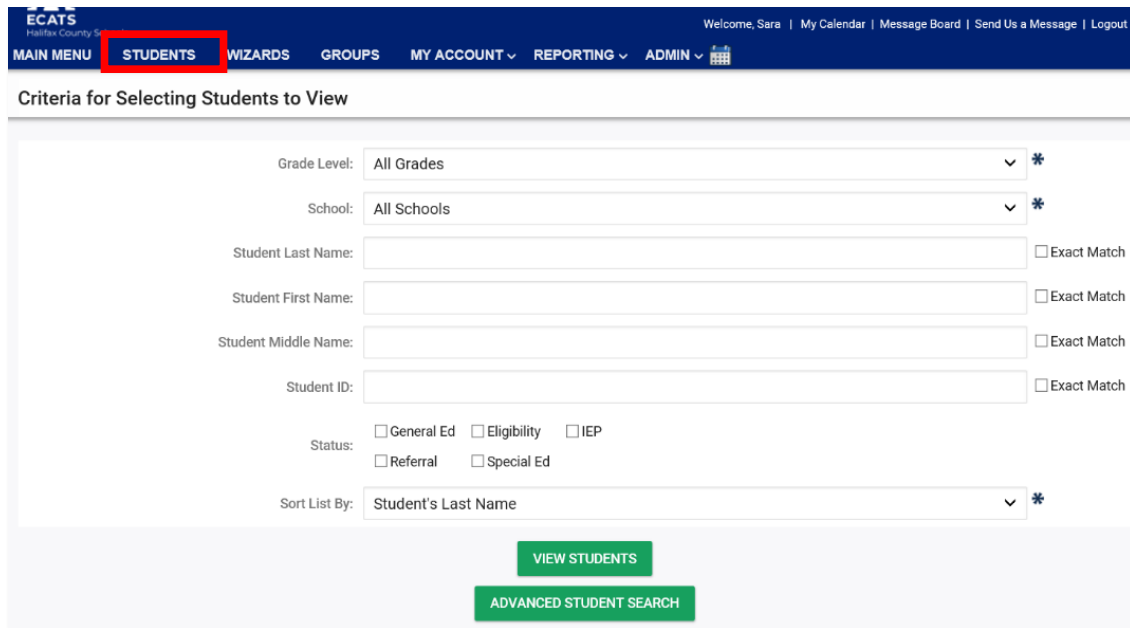
- 4) ECATS reports that have already been generated can be accessed by hovering over the “Reporting” tab and clicking on “My Reports” or by hovering over the “My Account” tab, clicking on “My Reports.” Documents can be accessed by clicking on the “My Docs” tab under the “My Account” tab.



The screenshot shows the ECATS web application interface. The top navigation bar is dark blue with the ECATS logo on the left and user information on the right. The main menu is white with a dark blue background for the navigation items. The 'REPORTING' menu item is highlighted with a red box, and a dropdown menu is visible below it, showing 'MY REPORTS' and 'STANDARD REPORTS' options. The main content area is white and contains an 'Announcements' section with the text 'Welcome to EasyIEP!'.

## STUDENT INFORMATION

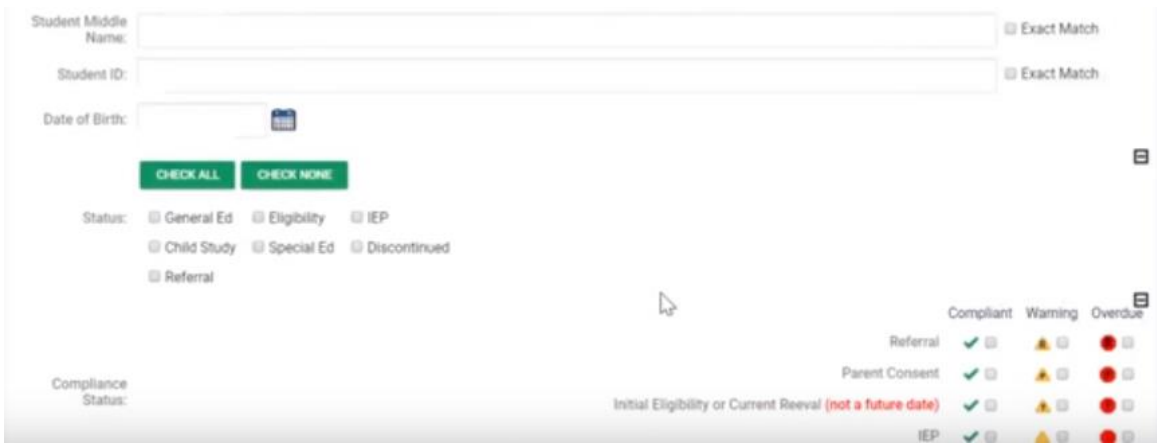
- 1) To access a specific student’s record, click on the “Students” tab. Users can search by student first or last name, student ID, school, grade, or status. Enter relevant search criteria and click the “View Students” button. Users can also click on the “Advanced Student Search” button to run more detailed searches, including searching by related service.



The screenshot shows the ECATS interface with the 'STUDENTS' tab highlighted in red. The search criteria form includes the following fields and options:

- Grade Level: All Grades (dropdown with asterisk)
- School: All Schools (dropdown with asterisk)
- Student Last Name: [text input]  Exact Match
- Student First Name: [text input]  Exact Match
- Student Middle Name: [text input]  Exact Match
- Student ID: [text input]  Exact Match
- Status:  General Ed  Eligibility  IEP  Referral  Special Ed
- Sort List By: Student's Last Name (dropdown with asterisk)

Buttons at the bottom: VIEW STUDENTS, ADVANCED STUDENT SEARCH



The screenshot shows the 'Advanced Student Search' form with the following fields and options:

- Student Middle Name: [text input]  Exact Match
- Student ID: [text input]  Exact Match
- Date of Birth: [calendar icon]
- Buttons: CHECK ALL, CHECK NONE
- Status:  General Ed  Eligibility  IEP  Child Study  Special Ed  Discontinued  Referral
- Compliance Status:
 

	Compliant	Warning	Overdue
Referral	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent Consent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initial Eligibility or Current Reeval (not a future date)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IEP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 2) Clicking on the student’s name will direct the user to the student’s “Student Profile” page. Here users can access documents and view student information including but not limited to student history, eligibility information, current IEP, etc. The information visible may depend upon your user role (User Type) assigned to you within the ECATS system.

ECATS Halifax County Schools

Welcome, Sara | My Calendar | Message Board | Send us a Message | Logout

MAIN MENU STUDENTS WIZARDS GROUPS MY ACCOUNT REPORTING ADMIN

STUDENT INFORMATION EC PROCESS PLAN OF CARE DOCUMENTS

EdPlan™ EDPlan Student Profile Alena Mathew

Personal Information Performance Data Grades Attendance Special Education

**Personal Information**

Name	Alena Mathew	ELL Level	
School	Test School	Grade	
Student ID	10293	Status	SpecialEd
Date of Birth	02/18/2004	Reading Level	
Home Language		Guardians	
Phone			
Group(s)		Teacher(s)	

3) To view a student’s event history in ECATS, hover over “Student Information” and select “Student History.”

STUDENT INFORMATION EC PROCESS PLAN OF CARE DOCUMENTS

PROFILE

PERSONAL INFORMATION **Student Profile** Alena Mathew

REG. ED./PARENTS/STUDENT

TEAM

ELIGIBILITY

SPECIAL ED SERVICES

RELATED SERVICES

CONTACTS

**STUDENT HISTORY**

Performance Data Grades Attendance Special Education

Name	Alena Mathew	ELL Level	
School	Test School	Grade	
Student ID	10293	Status	SpecialEd
Date of Birth	02/18/2004	Reading Level	
Home Language		Guardians	
Phone			
Group(s)		Teacher(s)	

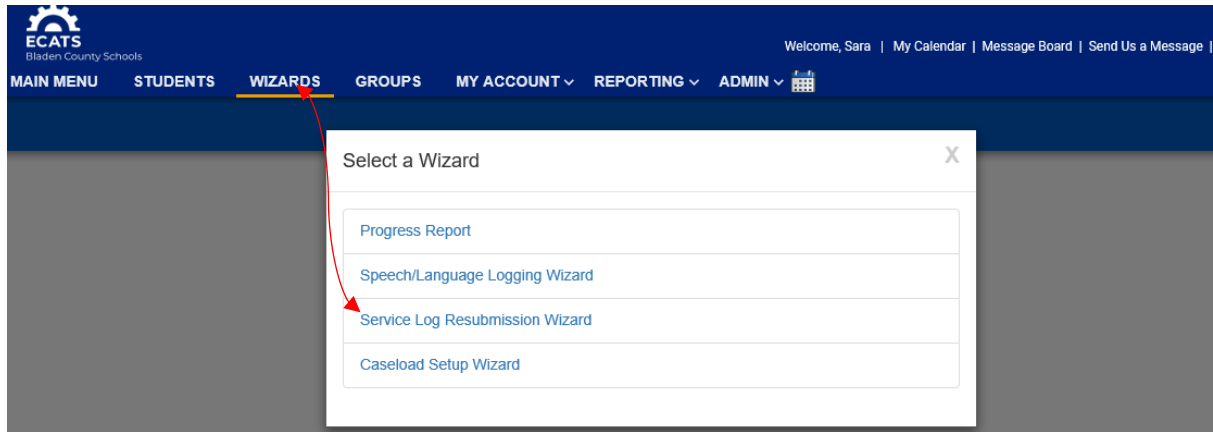
**Student History** Jonathan Test (●)

Event ID	Event Date*	Event Type	Begin Date	End Date	User	Document	Date Created	
20	01/05/2018	Provision of Services Parental Consent			Jonathan Lester	<a href="#">Consent for Services - DEC.6 (ID# 23)</a>	01/05/2018 09:33 (38 days)	<a href="#">DETAILS</a>
19	01/05/2018	Eligibility Determination	01/05/2018	01/05/2021	Jonathan Lester	<a href="#">Eligibility Determination (ID# 26)</a>	01/05/2018 09:33 (38 days)	<a href="#">DETAILS</a>
18	01/05/2018	Parent Consent			Jonathan Lester	<a href="#">Consent for Eval - DEC.2 (ID# 22)</a>	01/05/2018 09:29 (38 days)	<a href="#">DETAILS</a>
17	01/05/2018	Parent Consent to Reevaluate			Jonathan Lester	<a href="#">Consent for Eval - DEC.2 (ID# 22)</a>	01/05/2018 09:29 (38 days)	<a href="#">DETAILS</a>
16	01/05/2018	Referral			Jonathan Lester		01/05/2018 09:28 (38 days)	<a href="#">DETAILS</a>
15	01/05/2018	Referral Discontinuation			Jonathan Lester	<a href="#">Special Education Referral (ID# 21)</a>	01/05/2018 09:27 (38 days)	<a href="#">DETAILS</a>
14	01/05/2018	Grade Change (Third Grade)	01/05/2018		Jonathan Lester		01/05/2018 09:22 (38 days)	<a href="#">DETAILS</a>
13	01/05/2018	School Change (Test School)	01/05/2018		Jonathan Lester		01/05/2018 09:22 (38 days)	<a href="#">DETAILS</a>
12	01/05/2018	Student Enrollment			Jonathan Lester		01/05/2018 09:22 (38 days)	<a href="#">DETAILS</a>

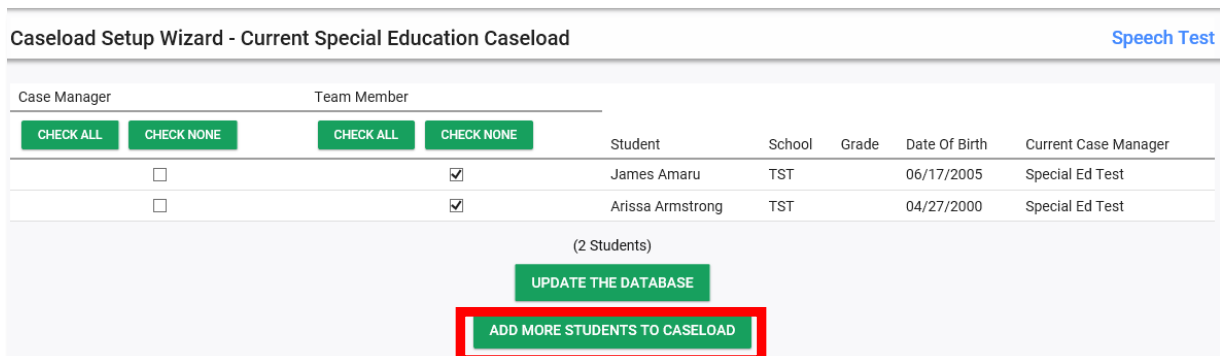


## SERVICE DOCUMENTATION CASELOAD SETUP

- 1) From the Main menu page, click on the “Wizards” tab and select the “Caseload Setup Wizard.” Click on the “Go to Users Caseload” button and if prompted to select a user’s caseload domain, select “Special Education.” Click the “Go to Users Caseload” button.



- 2) Click the “Add More Students to Caseload” button.



- 3) Search for the student(s) you would like to add to your caseload. It is best to leave the search as broad as possible. Once you have entered your search criteria, click the “View Students” button.

Caseload Setup Wizard - Search for Students to Add to Caseload Speech Test

Grade Level: All Grades \*  
 School: All Schools \*  
 Student Last Name:   Exact Match  
 Student First Name:   Exact Match  
 Student Middle Name:   Exact Match  
 Student ID:   Exact Match  
 Status:  General Ed  Eligibility  IEP  
 Referral  Special Ed  
 Sort List By: Student's Last Name \*

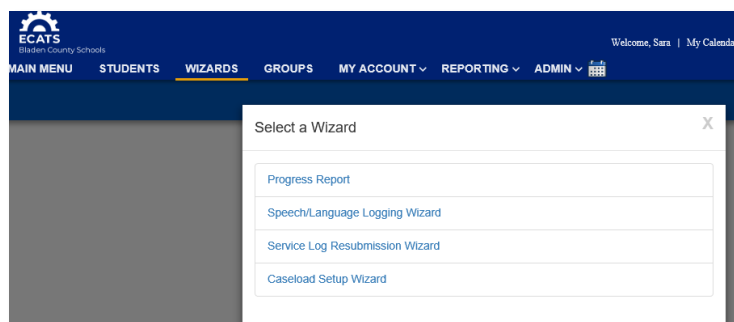
- 4) Check the “Team Member” or “Case Manager” (if applicable) check box next to the student(s) you would like to add to your caseload. Do not check both boxes for the same student. If applicable, you may have a button to add a Related Service to the IEP record upon placing the student on your caseload. After making selections, click “Add Students to Caseload.” The students will be added to your caseload, along with the related service (if applicable).

Caseload Setup Wizard - Current Special Education Caseload Speech Test

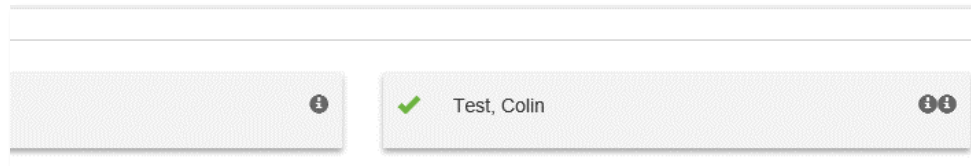
Case Manager		Team Member		Student	School	Grade	Date Of Birth	Current Case Manager
<input type="button" value="CHECK ALL"/>	<input type="button" value="CHECK NONE"/>	<input type="button" value="CHECK ALL"/>	<input type="button" value="CHECK NONE"/>					
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Naami Ahmad	TST		07/30/2011	Clinician Test
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	James Amaru	TST		06/17/2005	Special Ed Test
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Arissa Armstrong	TST		04/27/2000	Special Ed Test
(3 Students)								
<input type="button" value="UPDATE THE DATABASE"/>								
<input type="button" value="ADD MORE STUDENTS TO CASELOAD"/>								

## SERVICE DOCUMENTATION WIZARD SETUP

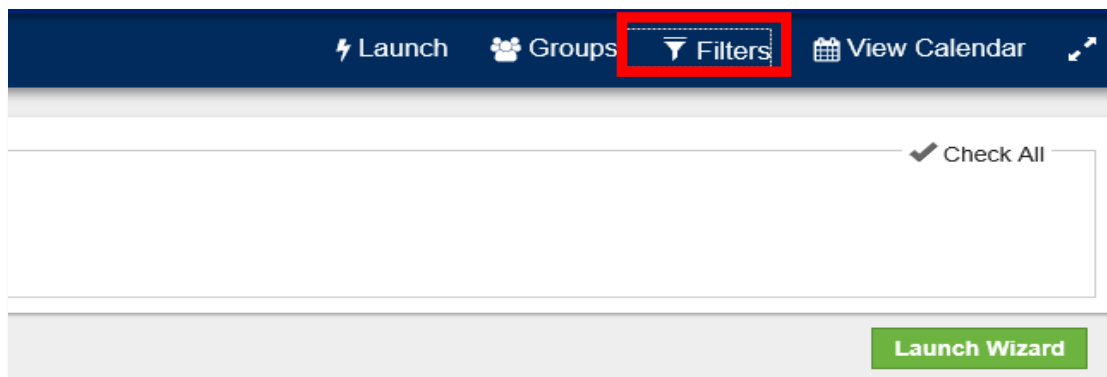
- 1) To log services for students, select the appropriate logging wizard from the “Wizards” tab. Access to Wizards tab will depend on set up of the user account by LEA Administrators.



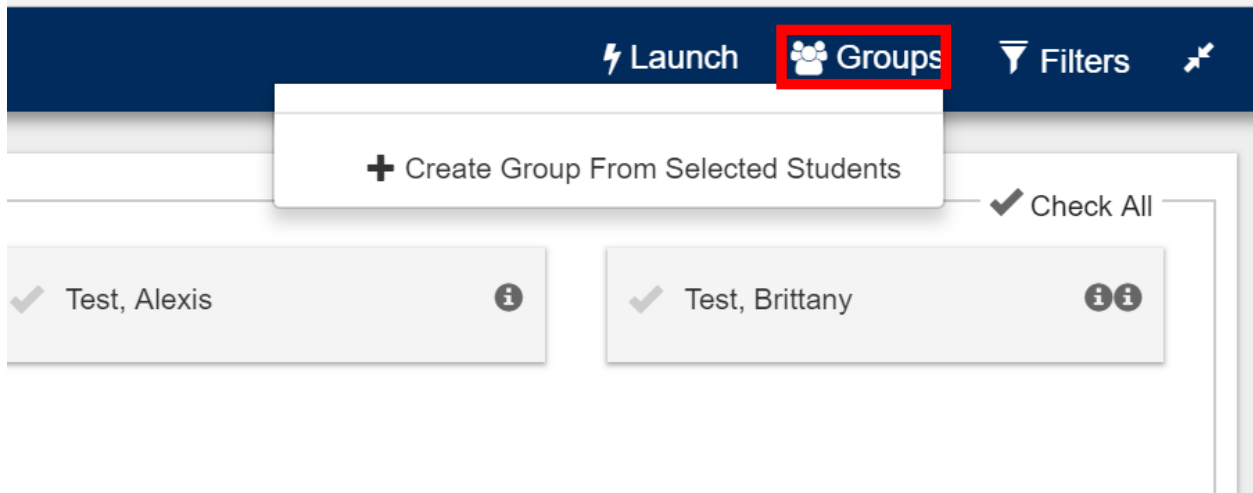
- 2) On the next screen you will see a listing of the students on your caseload with services available for logging. Select the student you want to document for by clicking the check mark next to the student's name. The check mark will turn green when the student is selected. The "i" (idents) can be used to view applicable service information for the student.



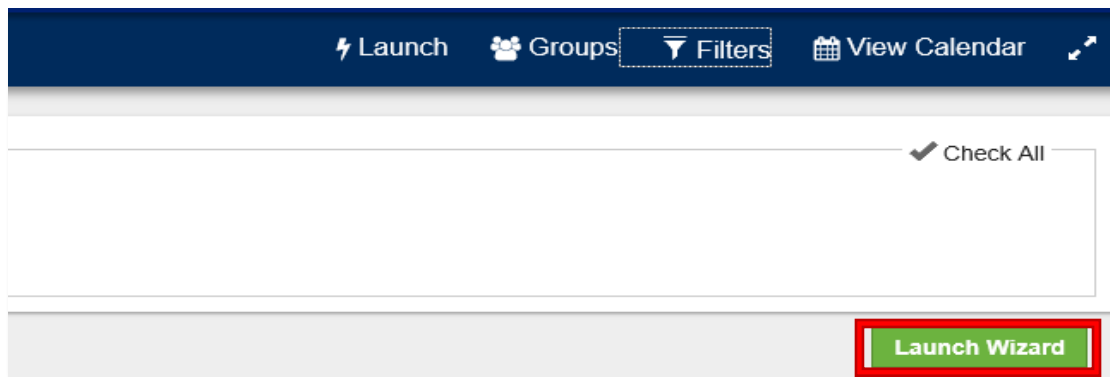
- 3) You can filter your caseload to help identify which students you want to document for (i.e., by school).



- 4) Groups can be created within the Logging Wizards for easy selection of the same students. To set up a group, select more than one student once you've applied any sorts or filtering. You will see another button appear next to the Filter button called "Groups". Click the button, then click "Create Group from Selected students". Name the group whatever you like, then click Save to save the group of students. Groups can also be overwritten with new students, or deleted by clicking the Groups button. Once you have pre-built your groups, you can easily use the "Groups" button to easily select that group of students again and log services for that group together

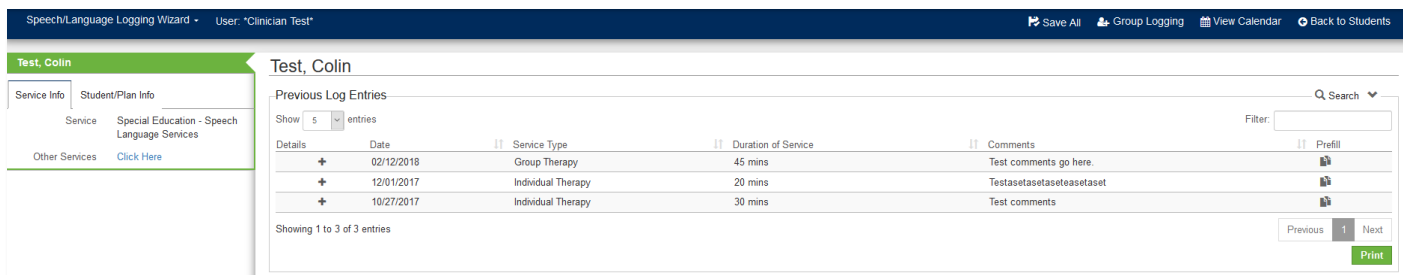


- 5) Once you have selected the student(s) you want to document for, click the “Launch Wizard” button located at the bottom of the screen.



## SERVICE DOCUMENTATION LOGGING WIZARD

- 1) Service/Plan info about the students selected for documentation on can be located next to their name on the left hand of the screen in the green navigation bar. Any previously logged sessions on this student by you or another clinician in your discipline will appear above the logging wizard in the Previous Log Entries section. Additionally, you can filter for specific sessions and expand a session using the plus button to see additional information in this section.



Speech/Language Logging Wizard - User: "Clinician Test" Save All Group Logging View Calendar Back to Students

Test, Colin

Service Info Student/Plan Info

Service Special Education - Speech Language Services

Other Services Click Here

Test, Colin

Previous Log Entries

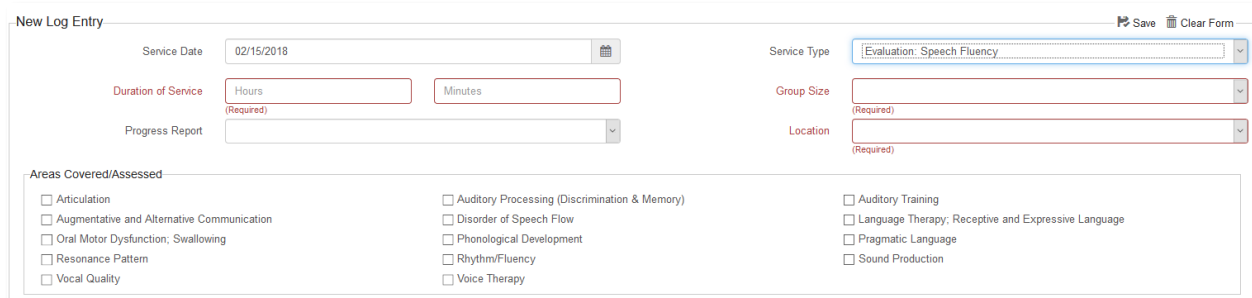
Show 5 entries Filter: Search

Details	Date	Service Type	Duration of Service	Comments	Print
+	02/12/2018	Group Therapy	45 mins	Test comments go here.	Print
+	12/01/2017	Individual Therapy	20 mins	Testasetasetasetasetaset	Print
+	10/27/2017	Individual Therapy	30 mins	Test comments	Print

Showing 1 to 3 of 3 entries

Previous 1 Next Print

- 2) Enter required information into the logging wizard. Date, service type, and duration of service are required fields. The service type drop down menu is where you select the service that was delivered whether it was treatment, an assessment, an absence, or other types of services. Additional fields will appear in red with a required notation, depending on the service type selected.



New Log Entry Save Clear Form

Service Date 02/15/2018

Duration of Service Hours Minutes (Required)

Progress Report

Service Type Evaluation: Speech Fluency

Group Size (Required)

Location (Required)

Areas Covered/Assessed



<input type="checkbox"/> Articulation	<input type="checkbox"/> Auditory Processing (Discrimination & Memory)	<input type="checkbox"/> Auditory Training
<input type="checkbox"/> Augmentative and Alternative Communication	<input type="checkbox"/> Disorder of Speech Flow	<input type="checkbox"/> Language Therapy, Receptive and Expressive Language
<input type="checkbox"/> Oral Motor Dysfunction; Swallowing	<input type="checkbox"/> Phonological Development	<input type="checkbox"/> Pragmatic Language
<input type="checkbox"/> Resonance Pattern	<input type="checkbox"/> Rhythm/Fluency	<input type="checkbox"/> Sound Production
<input type="checkbox"/> Vocal Quality	<input type="checkbox"/> Voice Therapy	

- 3) Any previously logged sessions on the student by you or another clinician in your discipline will appear above the logging wizard in the "Previous Log Entries" section. Additionally, you can search, sort, and filter for specific sessions. To view more information about a specific student, click the "+" button to expand the session to see additional information.

## Test, Alexis

Previous Log Entries Search

Show  entries Filter:

Details	Date	Service Type	Duration of Service	Comments	Prefill
	06/06/2018	Individual Therapy	40 mins	Service note goes here.	

Showing 1 to 1 of 1 entries Previous  Next

New Log Entry Save  Clear Form

Service Date   
(Required)


Duration of Service  Hours  Minutes

Service Type   
(Required)

Group Size   
(Required)

- 4) Enter service note information into the comments section of the logging wizard. Spell check is available for you to use under the comments text box.

Comments



- 5) Once you are done entering service information for a student, click the “Save” button below the “Comments” box, or you can continue to log for additional students on this screen if you selected more than one student to document on. Once you are done logging all services, click the “Save All” button at the bottom of the screen.
- 6) If there are any warnings, they will be shown in a yellow text box and will not prevent you from saving your log, but serve as a reminder that there may be additional data required elsewhere for this student. Errors show up in red and will prevent you from saving the log. Once all errors are cleared, you can save the entry.
- 7) A confirmation message will display asking you to confirm the information you entered. You have the option to delete the note, edit the note, confirm the note and return to the top of the logging wizard, confirm the log and enter more logs for the student you are working on, or confirm the logs and return to the student selection page.

Confirm Log Entry

Test, Brittany

Provider	Clinician Test	Service Date	01/30/2018
Service Type	Group Therapy	Duration of Service	45 mins
Group Size	2	Location	Regular Education

Areas Covered/Assessed

- Articulation

Comments

Comments here.

Delete Edit

Confirm log(s), then return to the top of the logging wizard

Confirm log(s), then enter more logs for this Student

Confirm log(s), then return to the Student selection page

- 8) To document services using the Group Logging Wizard, click on the “Group Logging” button located at the top of the logging wizard. A different pop up window will guide you through a documentation screen where you will enter service information that pertains to all students in the group session. Areas covered/assessed selections on this screen should be applicable to the entire group. When you are finished, click the “Apply” button. The information you entered pertaining to all students will be prepopulated in the logging wizard for the students selected. This information can be edited or changed at any time. Next, enter individual information for each student in the group session, including service notes in the “Comments” box. When you are done, click the “Save All” button located either at the very bottom of the screen, or in the blue menu bar.



X

Select Group Fields

Service Date

Service Type

Duration of Service  Hours  Minutes

Group Size

Location

Areas Covered/Assessed

<input type="checkbox"/> Articulation	<input type="checkbox"/> Auditory Processing (Discrimination & Memory)	<input type="checkbox"/> Auditory Training
<input type="checkbox"/> Disorder of Speech Flow	<input type="checkbox"/> Language Therapy: Receptive and Expressive Language	<input type="checkbox"/> Augmentative and Alternative Communication
<input type="checkbox"/> Pragmatic Language	<input type="checkbox"/> Resonance Pattern	<input type="checkbox"/> Oral Motor Dysfunction: Swallowing
<input type="checkbox"/> Sound Production	<input type="checkbox"/> Vocal Quality	<input type="checkbox"/> Phonological Development
		<input type="checkbox"/> Rhythm/Fluency
		<input type="checkbox"/> Voice Therapy

Cancel
Apply

- 9) To delete a service log, first find it in the “Previous Log Entries” table. Next, expand the entry with the “+” button. Once you have the correct service selected in this table and expanded, you should see a red button titled “Request Removal”, click this button and you will be prompted to enter the reason for removing this log.

Previous Log Entries 🔍 Search

Show 5 entries Filter:

Details	Date	Service Type	Duration of Service	Comments	Prefill
+	07/09/2018	Group Therapy	30 mins	Service Notes	
-	07/09/2018	Progress Report	30 mins	Comments jhjk	

Log ID 8 Provider Clinician Test

Group Size 2 Location General Education

Areas Covered/Assessed

- Disorder of Speech Flow
- Articulation
- Auditory Processing (Discrimination & Memory)

Comments

Comments jhjk

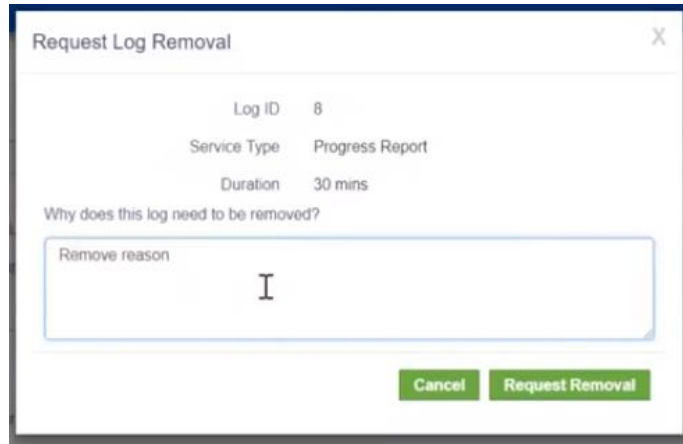
Request Removal

Showing 1 to 2 of 2 entries 
Previous
1
Next

- 10) Enter that information into the text box and click “Request Removal”. Once you click request removal, the log will be scheduled for deletion. The entry will remain on the



“Previous Log Entries” table until the log has been processed and deleted by the ECATS team.



Request Log Removal

Log ID: 8

Service Type: Progress Report

Duration: 30 mins

Why does this log need to be removed?

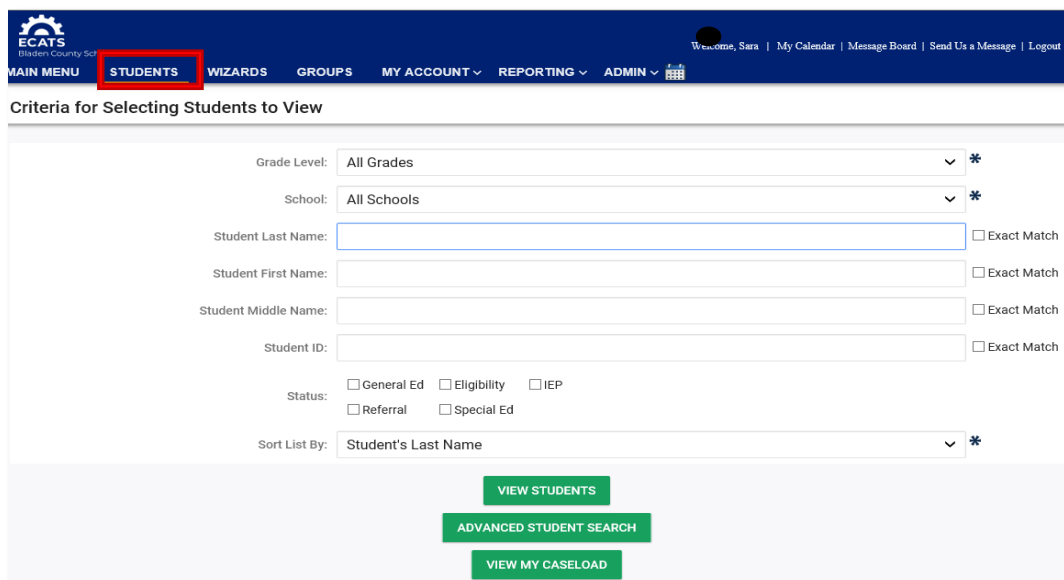
Remove reason

Cancel Request Removal

- 11) Once the service log deletion has been processed, the entry will be removed from the table and you will receive a message in the “My Inbox” or “Message Center” confirming that the record has been removed

## PLAN OF CARE (POC) DOCUMENT

- 1) Create a Plan of Care document for a student by clicking on the “Students” tab and searching for the student or clicking the “View My Caseload” button at the bottom of the screen. Once you have found the student, click on their name and you will be directed to their “Student Profile” page.



ECATS Bladen County Schools

WELCOME, Sara | My Calendar | Message Board | Send Us a Message | Logout

MAIN MENU **STUDENTS** WIZARDS GROUPS MY ACCOUNT REPORTING ADMIN

Criteria for Selecting Students to View

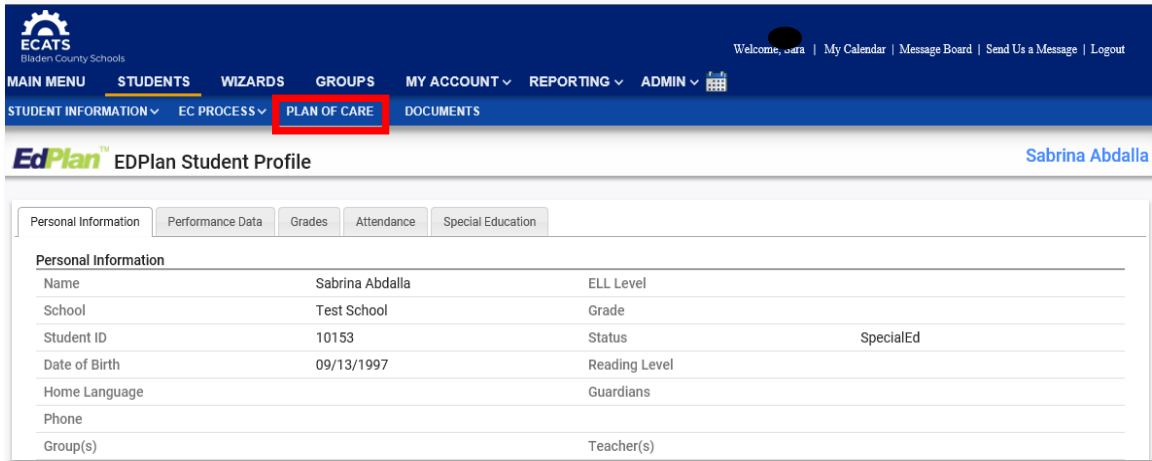
Grade Level: All Grades \*  
 School: All Schools \*  
 Student Last Name:   Exact Match  
 Student First Name:   Exact Match  
 Student Middle Name:   Exact Match  
 Student ID:   Exact Match

Status:  General Ed  Eligibility  IEP  
 Referral  Special Ed

Sort List By: Student's Last Name \*

VIEW STUDENTS  
 ADVANCED STUDENT SEARCH  
 VIEW MY CASELOAD

- 2) Click on the “Plan of Care” tab to create a plan of care for the student.

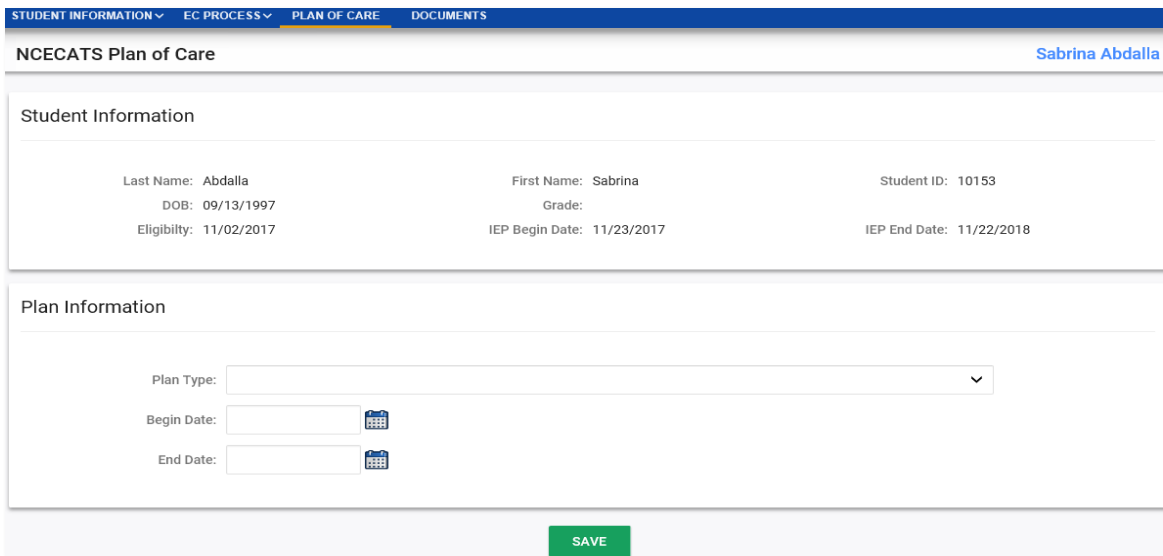


EdPlan™ EDPlan Student Profile Sabrina Abdalla

Personal Information | Performance Data | Grades | Attendance | Special Education

Personal Information			
Name	Sabrina Abdalla	ELL Level	
School	Test School	Grade	
Student ID	10153	Status	SpecialEd
Date of Birth	09/13/1997	Reading Level	
Home Language		Guardians	
Phone			
Group(s)		Teacher(s)	

- 3) To start writing a Plan of Care, first select the appropriate Plan Type and enter the begin and end dates for the Plan of Care. Access to the relevant Plan Type is determined by LEA Administrators for each user.




NCECATS Plan of Care Sabrina Abdalla


Student Information

Last Name: Abdalla	First Name: Sabrina	Student ID: 10153
DOB: 09/13/1997	Grade:	
Eligibility: 11/02/2017	IEP Begin Date: 11/23/2017	IEP End Date: 11/22/2018

Plan Information

Plan Type:

Begin Date:  


End Date:  


- 4) Next, select the student’s relevant goals and objectives that pertain to your Plan of Care in addition to interventions, treatments, approaches.

STUDENT INFORMATION ▾ EC PROCESS ▾ PLAN OF CARE DOCUMENTS

### Plan Information

Plan Type:

Begin Date:  

End Date:  

### Service Summary

Service	Location	Frequency
Speech/Language	Regular Education	3 session(s) per week, 30 min

### Interventions, Treatment, Modalities, Approaches, and Procedure


Intervention Approaches:  Create/Promote  Modify/Adapt  Prevent  
 Establish/Restore

Other:

Intervention Types:  One-on-One Interaction  Consultation with Team Members  Environmental Adaptation  
 Group  Education of Team Members  Program/Routine Development  
 Whole Class

- 5) Once you filled out all the sections that apply to your Plan of Care, scroll to the bottom of the page. If you are reviewing the Plan of Care created by another provider and are not creating your own Plan of Care, or if you are being supervised by another therapist, select the option indicating “I have reviewed, understand, and am serving under the existing Plan of Care/Treatment Plan” prior to creating a final document.

### Confirm Plan

 Confirm Plan - Please use this if you provide service under a POC that someone else has written, and are not creating your own POC

I have reviewed, understand, and am serving under the existing Plan of Care/Treatment Plan.

- 6) At the bottom of the page, you have the option to save your work, clear the template, create a draft or final document. Once you have finalized the Plan of Care, click the “Create Final Document” button. Click on the blue hyperlink under the Document header to view a PDF of the final document. This final document along with all other finalized Plans of Care for this student will permanently reside at the bottom of this page in the “Documents” section. You will be able

to view your finalized Plans of Care for this student in addition to all other finalized Plans of Care created by other clinicians in your discipline.

**Confirm Plan**

---

i Confirm Plan - Please use this if you provide service under a POC that someone else has written, and are not creating your own POC

I have reviewed, understand, and am serving under the existing Plan of Care/Treatment Plan.

SAVE

CLEAR ALL

CREATE DRAFT DOCUMENT

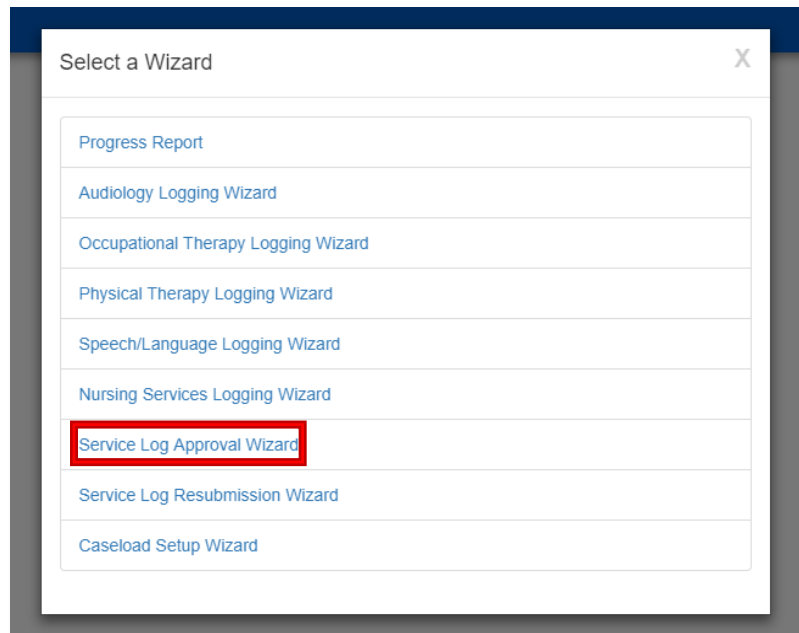
CREATE FINAL DOCUMENT

**Documents**

Document ID	Date Created	Created By	Document	Status
2	01/12/2018	Tim McFarland, Jr	<a href="#">NC Plan of Care</a>	Final

## SERVICE LOG APPROVAL PROCESS

- 1) The Service Log Approval Process is used for those therapists who require a supervisor to approve their service logs. The setup of Supervisor-Supervisee relationships may be found in more detail in the Service Documentation Administrator manual. After a supervisee has entered a log through the Wizards, the supervisor will navigate to the “Service Log Approval Wizard.”



- 2) Once the “Service Log Approval Wizard” is opened, the Supervisor can filter by numerous parameters to look only at a subset of services to approve such as: schools, date range by service, and date range by signed date. Once you have selected your parameters click the “Continue” button.

**Service Log Approval Wizard**

This wizard will guide you through approving service logs that were entered by the users that you are the Supervisor for. Please select the user(s) that you want to approve logs for.

Unsupervised Test (Special Education - Speech Language Services)  Unsupervised Test (Speech/Language)

Filter By:

School:

Date of Service:

Date Signed:

Sort Results By:

then

- 3) Any pending logs will display with the option for the Supervisor to reject or approve each log. If rejected, the Supervisor can enter a reason before sending the log back to the Supervisee. Once you have made your selection to approve or reject, click the “Approve/Reject The Selected Service Logs” button.

Approve/Reject Service Logs Entered by Unsupervised Test (Speech/Language)

Approve		Reject		Details		Service	Student	Date of Service	Date Signed	Service Type	Group Size	Progress Report
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Speech/Language	Colin Test	12/01/2017	12/05/2017	Individual Therapy	1	Regressing
		Rejection Reason				Areas Covered/Assessed: Language Therapy; Receptive and Expressive Language Duration of Service: 0:20 Location: Regular Education Comments: Testasetasetasetaset						

(1 Service Log)

- 4) If any logs are rejected, the Supervisee can resubmit the logs by navigating to the “Service Log Resubmission Wizard”:

Select a Wizard X

- [Progress Report](#)
- [Audiology Logging Wizard](#)
- [Occupational Therapy Logging Wizard](#)
- [Physical Therapy Logging Wizard](#)
- [Speech/Language Logging Wizard](#)
- [Service Log Resubmission Wizard](#)
- [Caseload Setup Wizard](#)

- 5) You will see a list of service logs that have been rejected. Click the checkbox under “Resubmit” and then click “Resubmit Logs”

**Service Log Resubmission Wizard**

This wizard will guide you through resubmitting your rejected service logs. Please select the service log(s) you want to resubmit.

Resubmit	Service	School	Student	Service Type	Date of Service	Date Signed	Rejection Reason
<input type="checkbox"/>	Speech/Language	Test School	[REDACTED]	Student Absent	02/19/2018	03/01/2018	Test Rejection

**RESUBMIT LOGS**

- 6) At the top of the screen you will see the reason the log was rejected, if indicated by your Supervisor. Make any necessary corrections in the form below, then click “Update the Database”. ~~Once the Supervisee selects a log and chooses “Resubmit Logs” they will be taken to a screen to complete the entry and submit again to their Supervisor for approval.~~

**Resubmit Service Log Entry**

**Rejection Reason: Test Rejection**  
Please correct the information below for this reason and submit the new log.

Rejected Log Entered by Unsupervised Test

Date:	02/19/2018	Duration of Service:	0:00
Group Size:		Progress Report:	Service Type: Student Absent
Comments:			

Date of Service: 02/19/2018  \* : Student Absent  \*

Duration of Service:  Hours :  Minutes Group Size:

Progress Report:

Location:

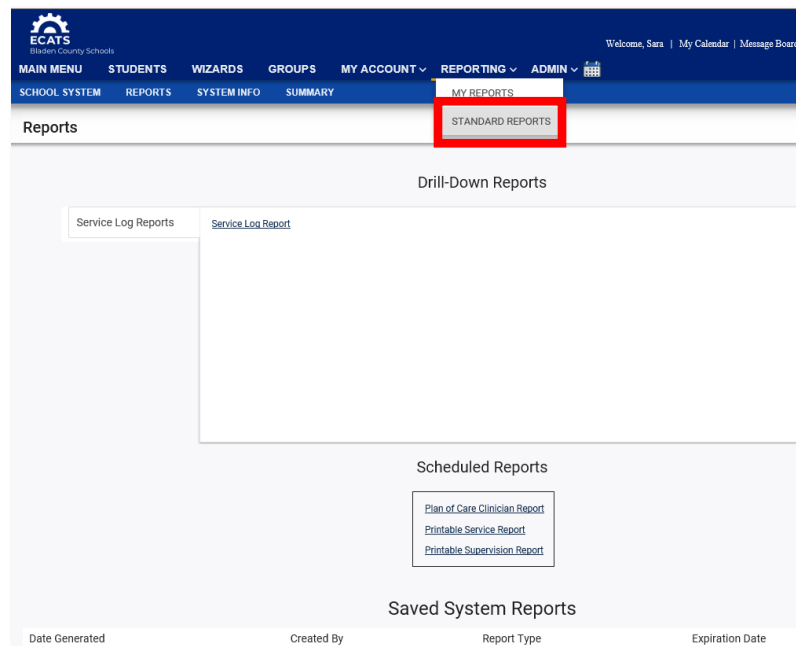
Comments:

Areas Covered/Assessed:

<input type="checkbox"/> Articulation	<input type="checkbox"/> Language Therapy; Receptive and Expressive Language	<input type="checkbox"/> Rhythm/Fluency
<input type="checkbox"/> Auditory Processing (Discrimination & Memory)	<input type="checkbox"/> Oral Motor Dysfunction; Swallowing	<input type="checkbox"/> Sound Production
<input type="checkbox"/> Auditory Training	<input type="checkbox"/> Phonological Development	<input type="checkbox"/> Vocal Quality
<input type="checkbox"/> Augmentative and Alternative Communication	<input type="checkbox"/> Pragmatic Language	<input type="checkbox"/> Voice Therapy
<input type="checkbox"/> Disorder of Speech Flow	<input type="checkbox"/> Resonance Pattern	

## CLINICIAN REPORTS

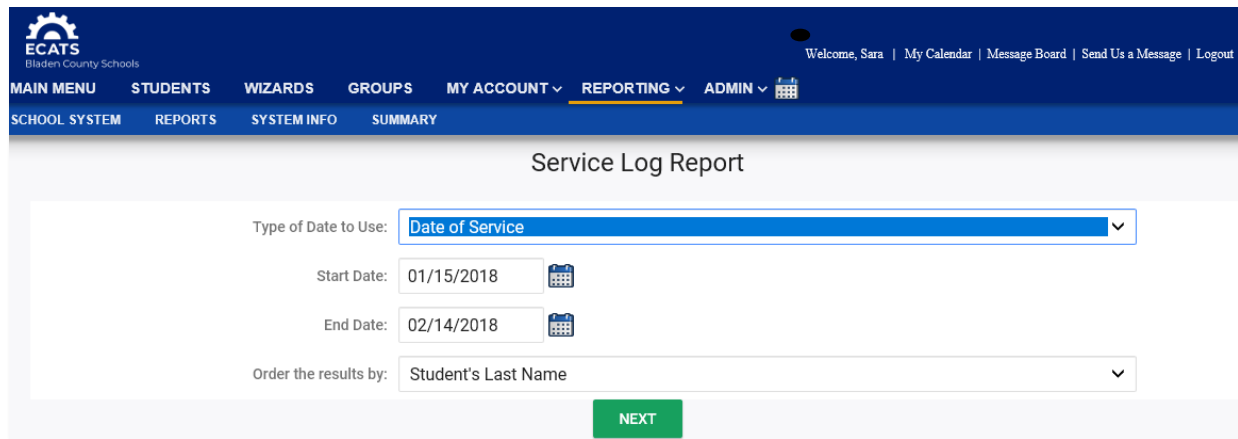
- 1) Users can create many kinds of reports by hovering over the “Reporting” tab and selecting “Standard Reports”. The two most basic of which are the **Service Log Report** and the **Plan of Care Clinician Report**.



The screenshot shows the ECATS Reporting interface. The top navigation bar includes 'MAIN MENU', 'STUDENTS', 'WIZARDS', 'GROUPS', 'MY ACCOUNT', 'REPORTING', and 'ADMIN'. The 'REPORTING' dropdown menu is open, showing 'MY REPORTS' and 'STANDARD REPORTS' (highlighted with a red box). Below the navigation, the 'Reports' section is displayed, featuring a 'Drill-Down Reports' section with a 'Service Log Reports' link and a 'Service Log Report' link. A 'Scheduled Reports' section contains links for 'Plan of Care Clinician Report', 'Printable Service Report', and 'Printable Supervision Report'. At the bottom, there is a 'Saved System Reports' section with a table header containing 'Date Generated', 'Created By', 'Report Type', and 'Expiration Date'.

- 2) To run the Service Log Report, select the report name from the “Drill Down Reports” section. Select the necessary parameters and date span and click the “Next” button.





The screenshot shows the ECATS web application interface. At the top, there is a navigation bar with the ECATS logo and the text "Bladen County Schools". To the right of the logo, it says "Welcome, Sara | My Calendar | Message Board | Send Us a Message | Logout". Below this is a main menu with options: MAIN MENU, STUDENTS, WIZARDS, GROUPS, MY ACCOUNT, REPORTING (highlighted), and ADMIN. Underneath the main menu is a sub-menu with options: SCHOOL SYSTEM, REPORTS, SYSTEM INFO, and SUMMARY. The main content area is titled "Service Log Report". It contains a form with the following fields: "Type of Date to Use:" with a dropdown menu set to "Date of Service"; "Start Date:" with a text input "01/15/2018" and a calendar icon; "End Date:" with a text input "02/14/2018" and a calendar icon; and "Order the results by:" with a dropdown menu set to "Student's Last Name". A green "NEXT" button is located at the bottom right of the form.

- 3) Click on a student's name to see a list of services provided to the student during the date range entered.

**Services Logged By Clinician Test**

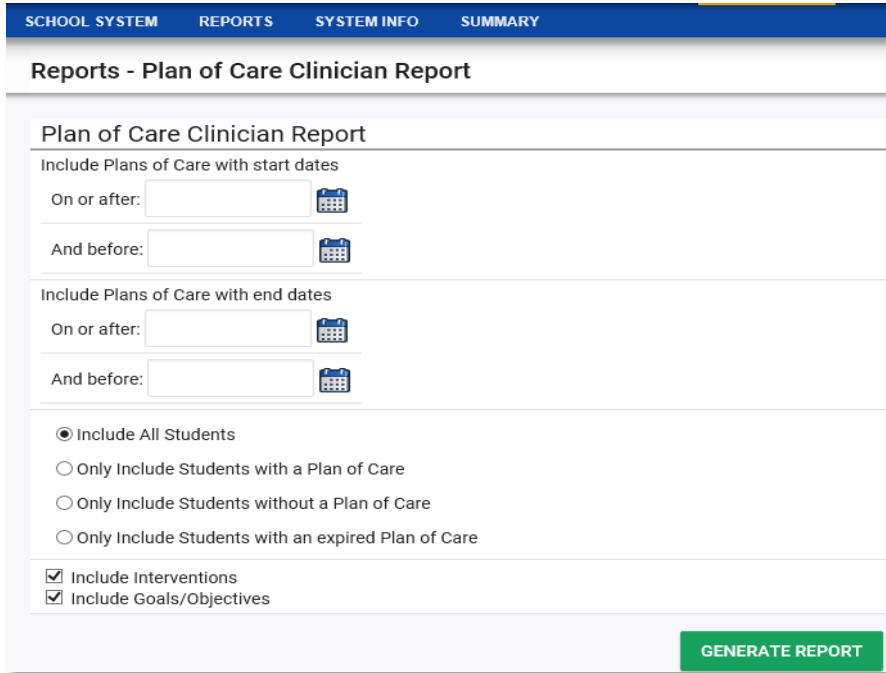
Services Provided From 01/23/2017 to 02/22/2018

Click on a Student to see the services logged for that Student

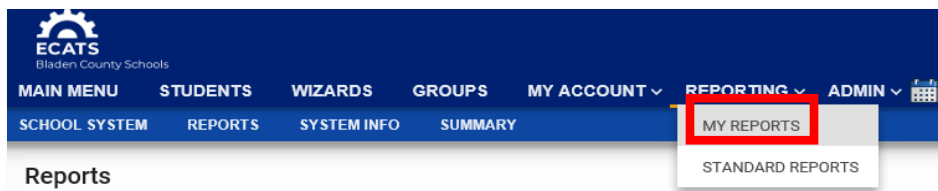
Student Name	Number of Services Logged
Jerome Adams	0
<a href="#">Angel Adrian</a>	1
Alanis Ahryanna	0
<a href="#">Chase Bailey</a>	2
<a href="#">David Brokaw</a>	1
<a href="#">Vanesa Chestnut</a>	1
James Collins	0
Taylor Dominguez	0
Hailey Garcia Arguelles	0
<a href="#">Matthew Lee</a>	1

- 4) To delete a service entry, run a "Service Log Report" and after clicking on the student name, click the "View" button next to the date of service you want to delete. Click the "Request Deletion" button on the left side of the screen, provide the reason for the deletion request and proceed to the confirmation screen. Confirm that you want to delete the service.
- 5) After you have requested to have the service deleted, the session will display a red **X** in the "Request Removal" column. The **X** will remain until the log has been deleted by the ECATS team.
- 6) To run the "Plan of Care Clinician Report," navigate to the "Standard Reports" page and click on the "Plan of Care Clinician Report." Enter the date parameters and select which types of

students or plans you want to view in your report. The inclusion of Interventions and Goals/Objectives is also possible, and optional. Click the “Generate Report” button.



- 7) You will receive an email notification when your reports are ready to view and/or print. To access completed reports, click on “My Reports” from the “Reporting” tab at the top of the page. Your reports will be listed here for you to view or print. Click on the report name to open the report.



Reports Clinician Test

Report	Date Created	Created By	Report Level		
			System	School	User
<a href="#">Printable Service Report</a>	02/22/2018	Clinician Test			
<a href="#">Plan of Care Clinician Report</a>	02/22/2018	Clinician Test			
<a href="#">Printable Service Report</a>	02/21/2018	Clinician Test			

( Reports )

## Mandated vs. Delivered

**Summary:** Mandated vs. Delivered seeks to assist service providers with keeping track of the number of sessions they document versus the number that are mandated per the IEP. This feature allows providers to see the number of sessions per the IEP within the logging wizards and student services page, and track the number of sessions logged per the IEP mandate through a “bank” system.

1. Viewing mandated “bank” information on a student’s services page
  - a. “Bank” information can be viewed by navigating to a student’s related or special education services page and clicking the “details” button
  - b. From the service details page, click on the “view service cycles” page to pull up the bank information

Del	Pos	New Pos	Related Service	Num Sessions	Session Length	Location	Consult	ESY	Pct	Dis	Dates Start/End	
<input type="checkbox"/>	1		Speech/Language	7 per rep pd	30 min	General Educator	<input type="checkbox"/>	<input type="checkbox"/>	0.00		07/17/2018 07/16/2019	<a href="#">DETAILS</a> <a href="#">LOG</a>

Service Name: Speech/Language

Dates Service Provided: Start Date: 07/17/2018 End Date: 07/16/2019

Days Provided:  Monday  Tuesday  Wednesday  Thursday  Friday

Doctor Authorization: Start Date: End Date:

Location: General Education

[UPDATE THE DATABASE](#)

[VIEW SERVICE LOG ->](#) On or After: 03/26/2019 Before: 04/27/2019 (3 logs exist from 10/27/2017 to 04/01/2019)

[VIEW SERVICE CYCLES](#)

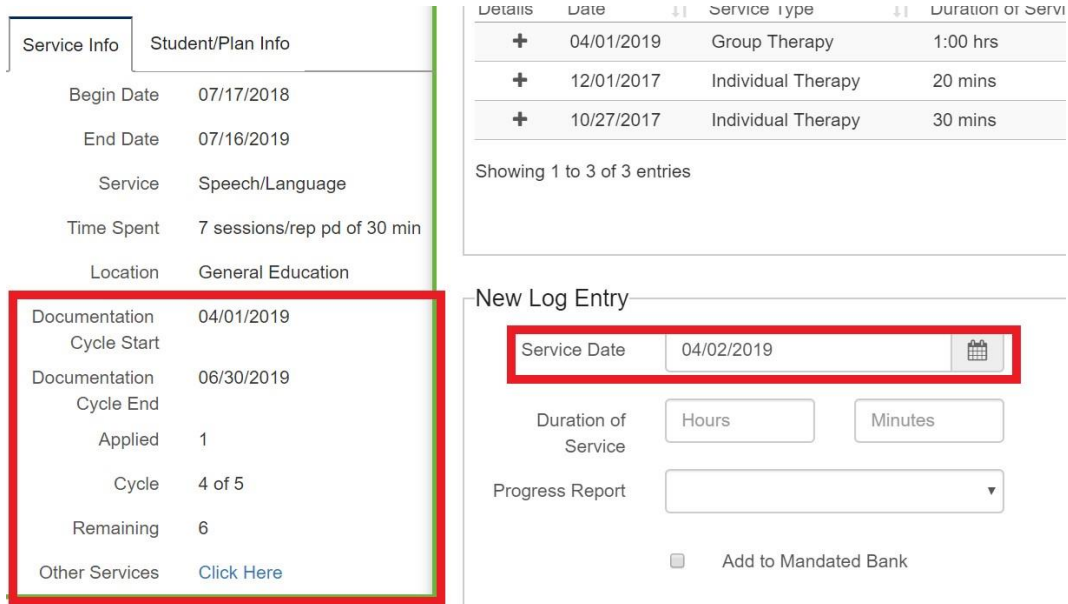
(There are 7.00 hour(s) in a school day at TST)

- c. From here, you can see the number of mandated services that have yet to be logged in the “Available” column
- d. The “Logged” column shows how many logged services have been applied to the mandated bank for that documentation cycle

Cycle	Begin Date	End Date	Available	Logged
Cycle 1	07/01/2018	09/30/2018	6	0
Cycle 2	10/01/2018	12/31/2018	7	0
Cycle 3	01/01/2019	03/31/2019	7	0
Cycle 4	04/01/2019	06/30/2019	6	1
Cycle 5	07/01/2019	09/30/2019	1	0

2. Viewing mandated “bank” information within the logging wizard

- a. The information displayed in the logging wizards will detail the number of sessions mandated by the currently valid IEP as well as the applied (or logged) services and a calculated remaining count
- b. Once a service date is entered in the logging wizard, the bank information will display on the left-hand side of the screen



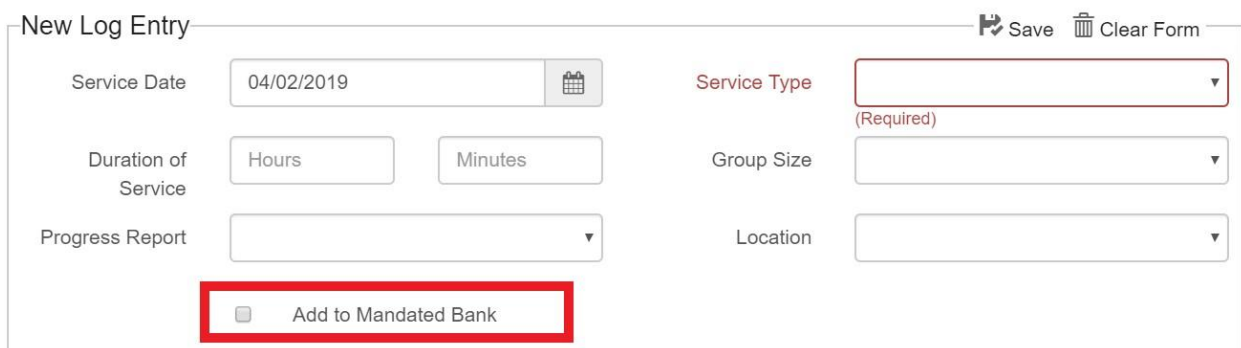
The screenshot shows a logging wizard interface. On the left, there is a 'Service Info' section with fields for Student/Plan Info, Begin Date (07/17/2018), End Date (07/16/2019), Service (Speech/Language), Time Spent (7 sessions/rep pd of 30 min), Location (General Education), Documentation Cycle Start (04/01/2019), Documentation Cycle End (06/30/2019), Applied (1), Cycle (4 of 5), Remaining (6), and Other Services (Click Here). A red box highlights the Documentation Cycle Start, Documentation Cycle End, Applied, Cycle, and Remaining fields. On the right, there is a table of service entries:

Details	Date	Service Type	Duration of Servi
+	04/01/2019	Group Therapy	1:00 hrs
+	12/01/2017	Individual Therapy	20 mins
+	10/27/2017	Individual Therapy	30 mins

Below the table, it says 'Showing 1 to 3 of 3 entries'. At the bottom, there is a 'New Log Entry' section with a 'Service Date' field (04/02/2019) highlighted with a red box, 'Duration of Service' fields for Hours and Minutes, a 'Progress Report' dropdown, and an 'Add to Mandated Bank' checkbox.

3. Applying a service to the mandated bank

- a. Every time a provider chooses to log/confirm a service log that applies towards the bank, the “remaining” count will decrease by 1 based upon the date of service being logged
- b. If a service provider chooses not to count a session towards the bank, the remaining count will not decrease
- c. To apply a service to the mandated bank, service providers are required to check the “Add to Mandated Bank” box before completing a service note
  - i. The “Add to Mandated Bank” checkbox is available in the Group Logging feature



The screenshot shows the 'New Log Entry' form. It includes fields for Service Date (04/02/2019), Duration of Service (Hours and Minutes), Progress Report (dropdown), Service Type (dropdown, marked as Required), Group Size (dropdown), and Location (dropdown). At the bottom, there is a red box highlighting the 'Add to Mandated Bank' checkbox.

- d. If a service is requested for removal, the “applied” count will decrease by a value of 1, while the “remaining” count for that documentation cycle will increase by a value of 1