ECATS

Service Documentation User Manual

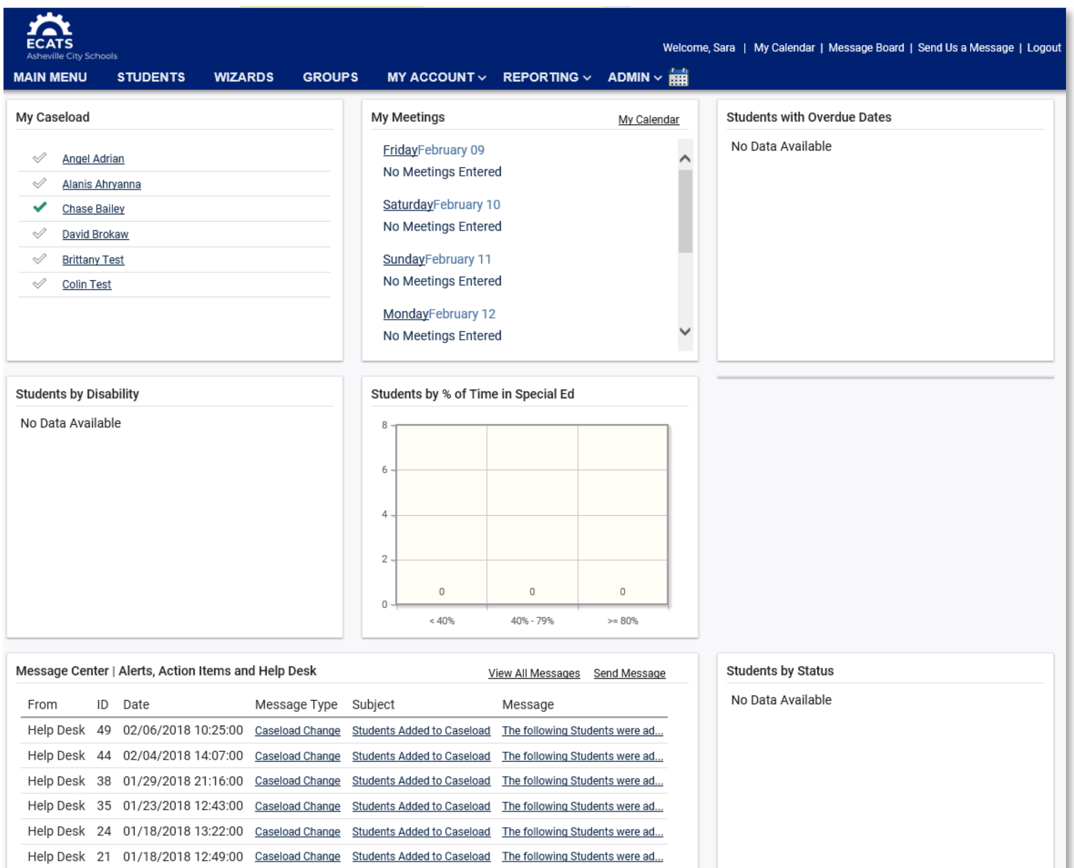
2019

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

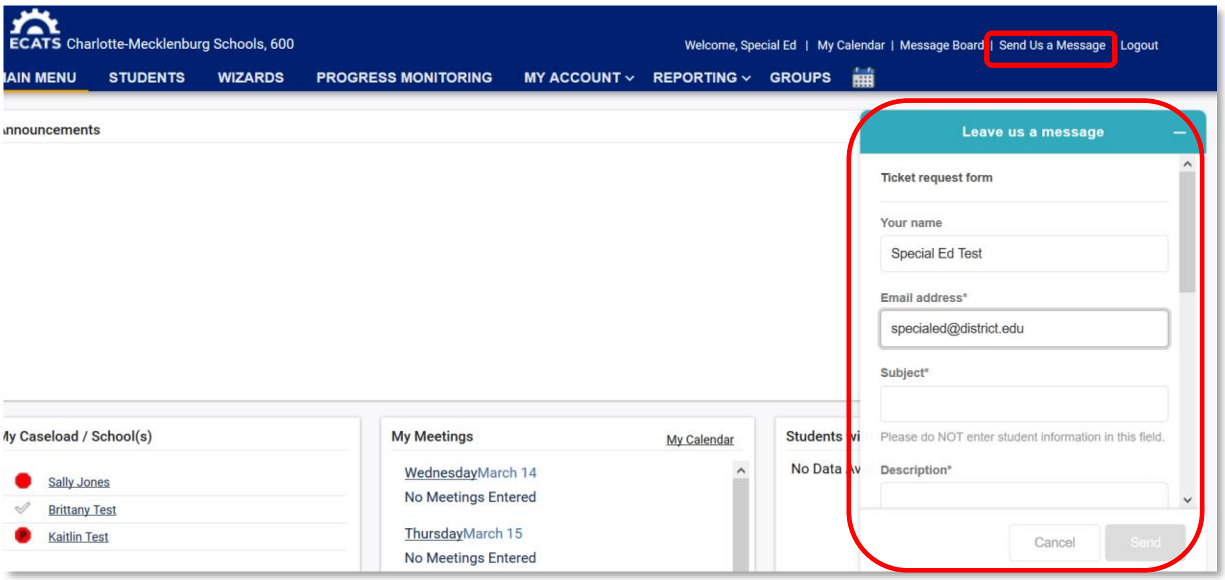
MAIN MENU

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.



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.

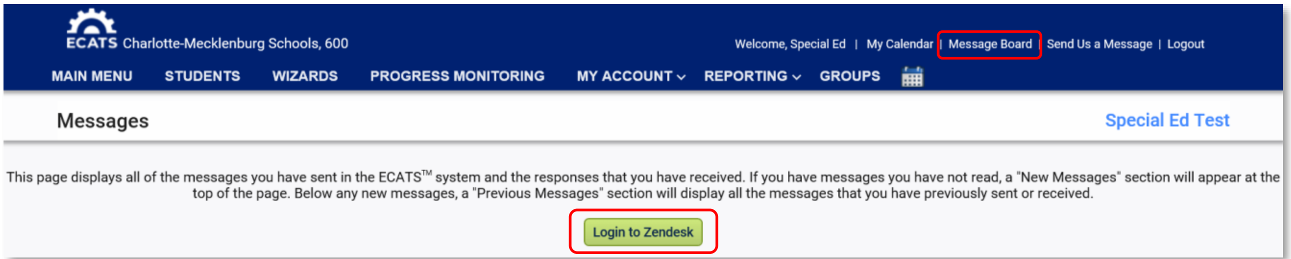


You will be prompted to enter the following ticket fields:

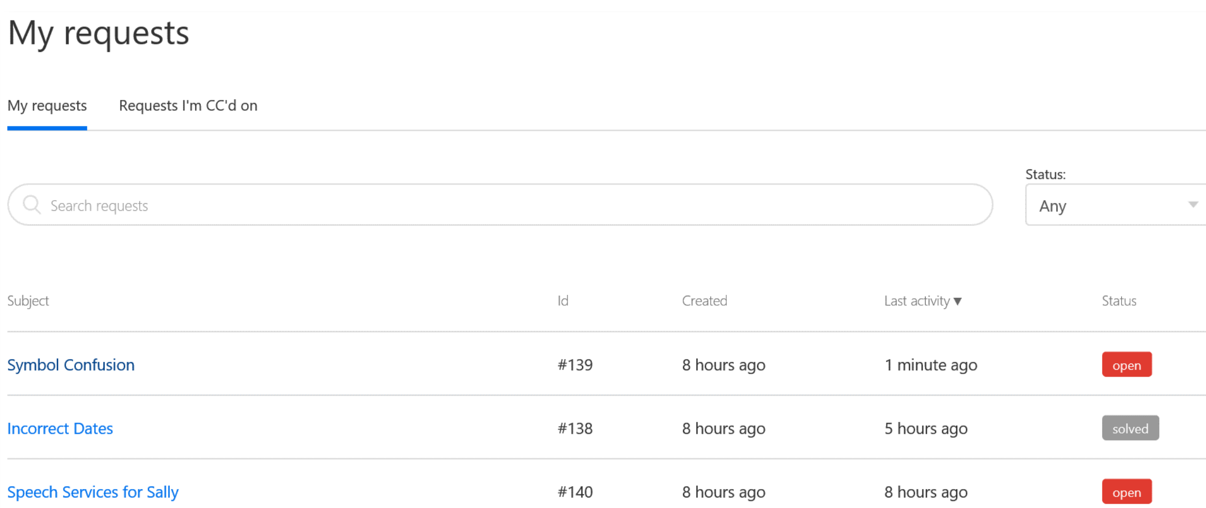
- **Your name** – This will auto populate with your name
- **Email address** – This will auto populate with the email set on your ECATS profile – IMPORTANT: this should NOT be changed when submitting a ticket.
- **Subject** - Enter a subject line (*required)
- **Description** – Describe your question/issue (*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.



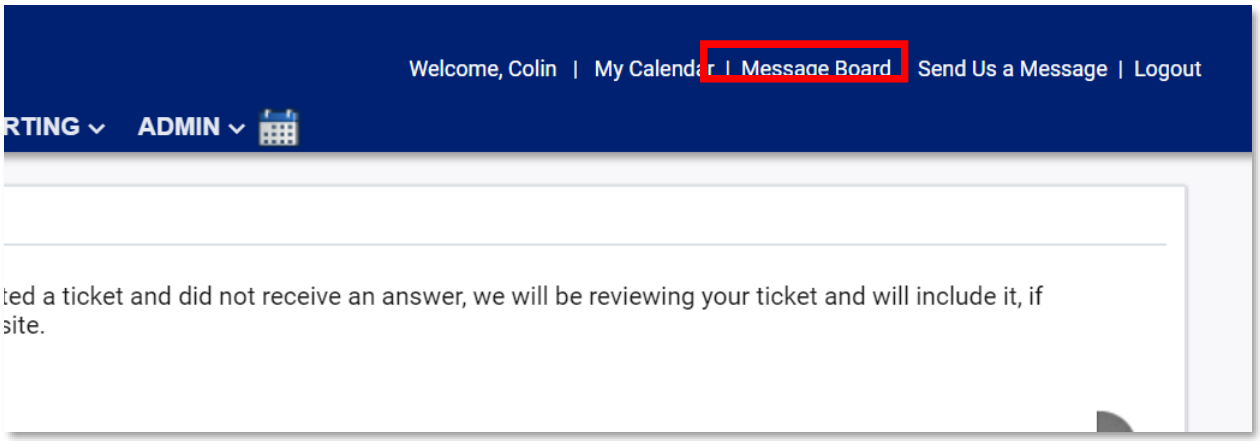
This will bring you to the Help Center. You can then select under your name > My Activities. This will bring up all the tickets you have submitted. From this view under "My requests", you can review ticket status (open, pending or solved), see comments/questions from ECATS Agents, and respond when appropriate.

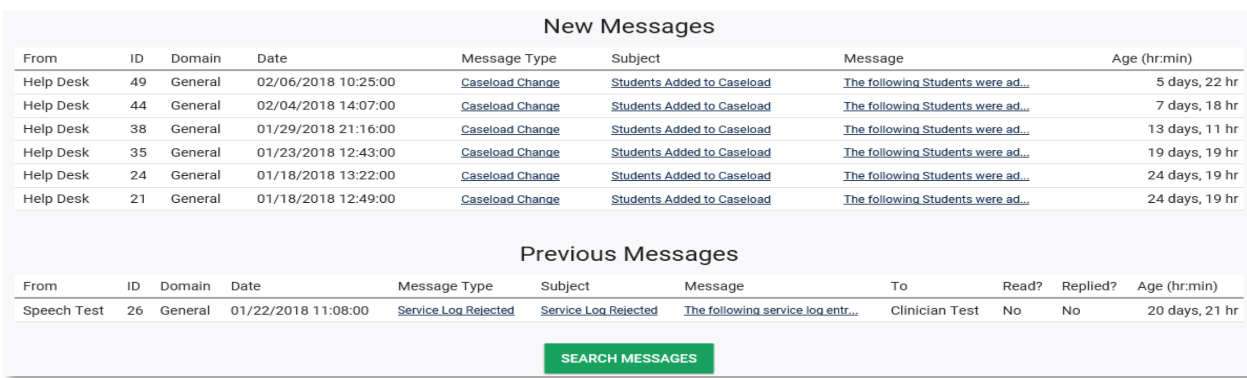


Subject	Id	Created	Last activity ▼	Status
Symbol Confusion	#139	8 hours ago	1 minute ago	open
Incorrect Dates	#138	8 hours ago	5 hours ago	solved
Speech Services for Sally	#140	8 hours ago	8 hours ago	open

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.





New Messages

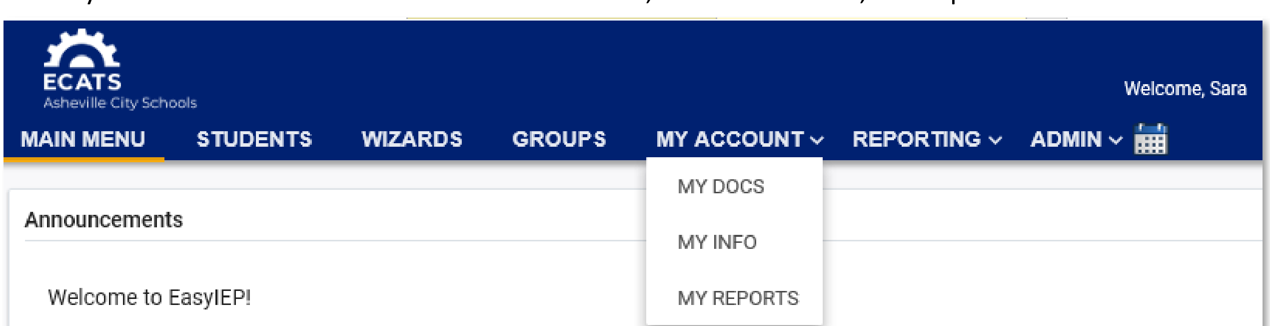
From	ID	Domain	Date	Message Type	Subject	Message	Age (hr:min)
Help Desk	49	General	02/06/2018 10:25:00	Caseload Change	Students Added to Caseload	The following Students were ad...	5 days, 22 hr
Help Desk	44	General	02/04/2018 14:07:00	Caseload Change	Students Added to Caseload	The following Students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

Previous Messages

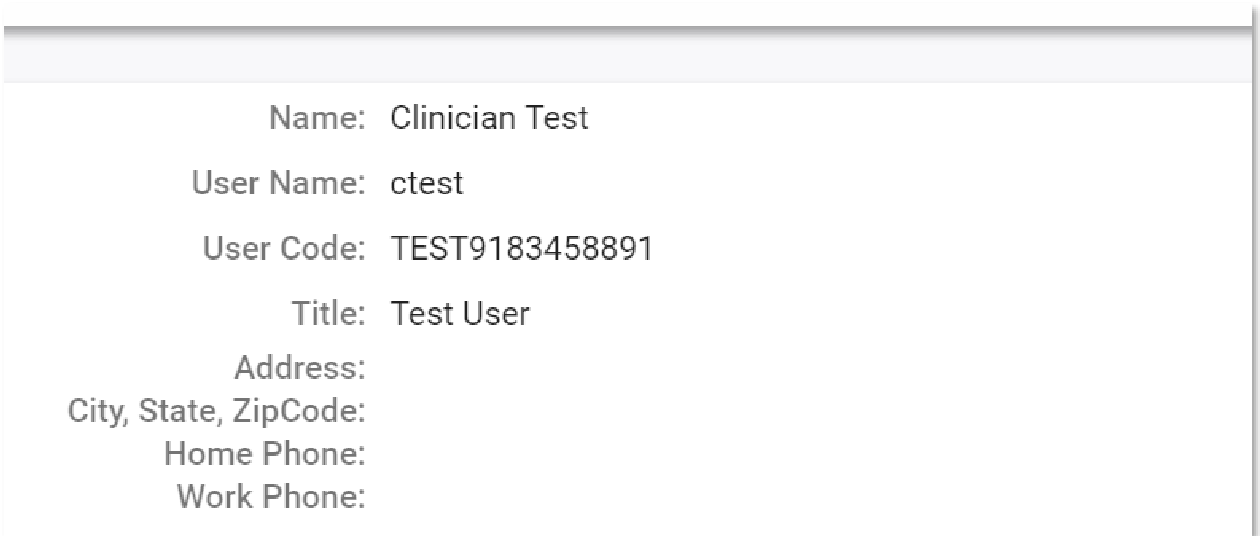
From	ID	Domain	Date	Message Type	Subject	Message	To	Read?	Replied?	Age (hr:min)
Speech Test	26	General	01/22/2018 11:08:00	Service Log Rejected	Service Log Rejected	The following service log entr...	Clinician Test	No	No	20 days, 21 hr

SEARCH MESSAGES

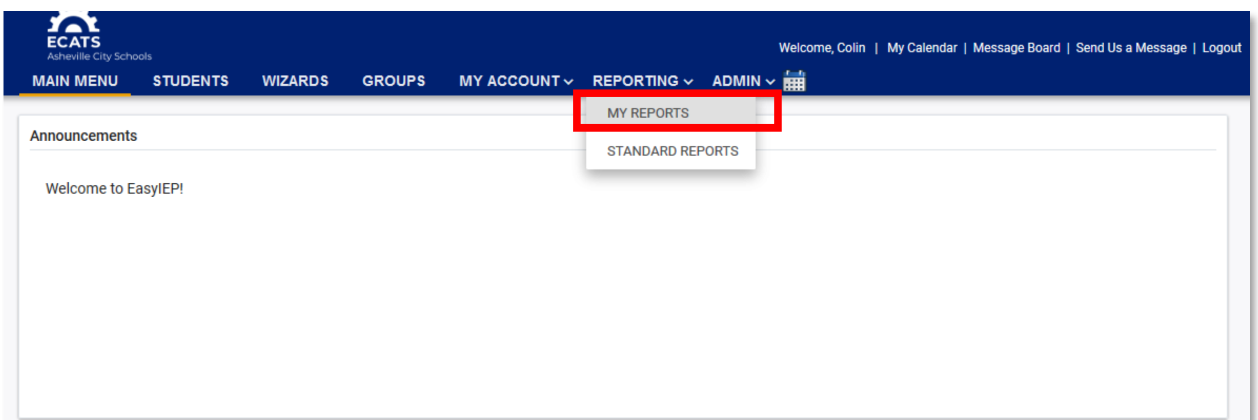
2) The "My Account" tab allows users to view documents, user information, and reports.



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

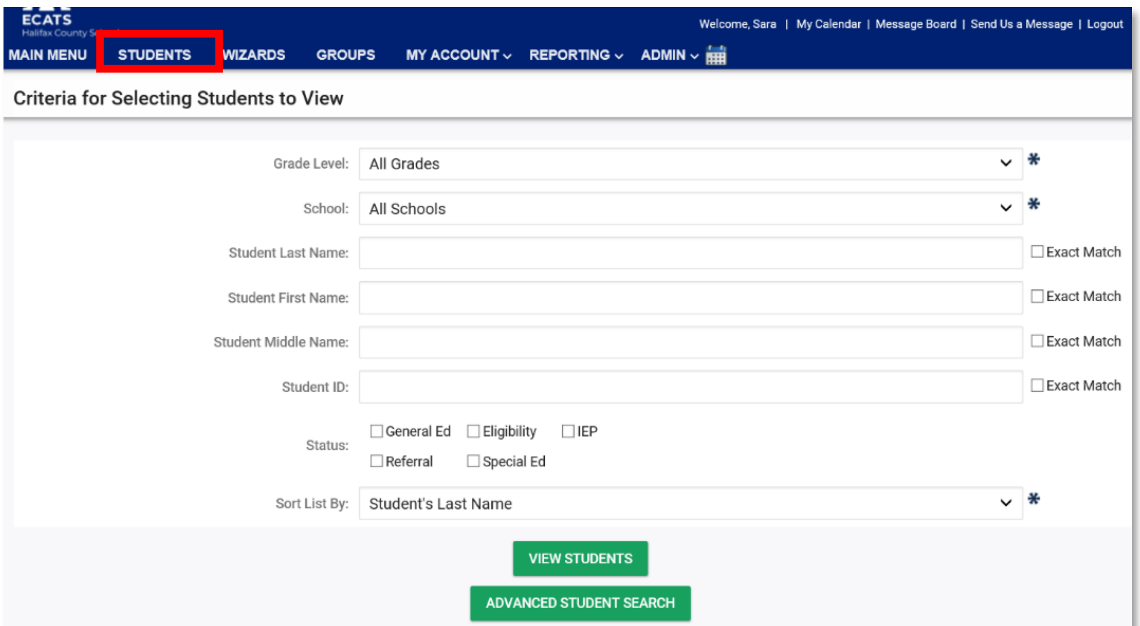


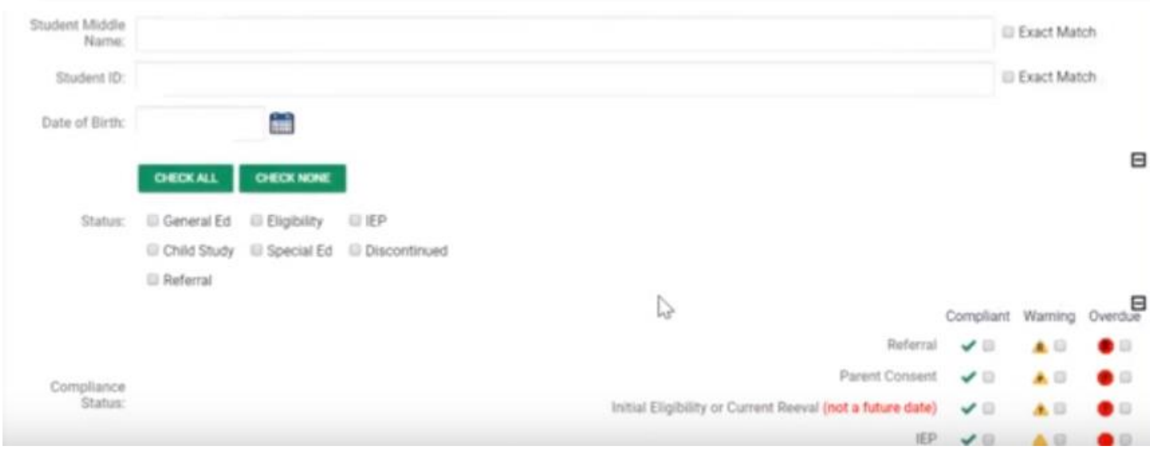
4) ECATS reports that have already been generated can be accessed by hovering over the “Reporting” tab and clicking on “My Reports” or by hovering over the “My Account” tab, clicking on “My Reports.” Documents can be accessed by clicking on the “My Docs” tab under the “My Account” tab.



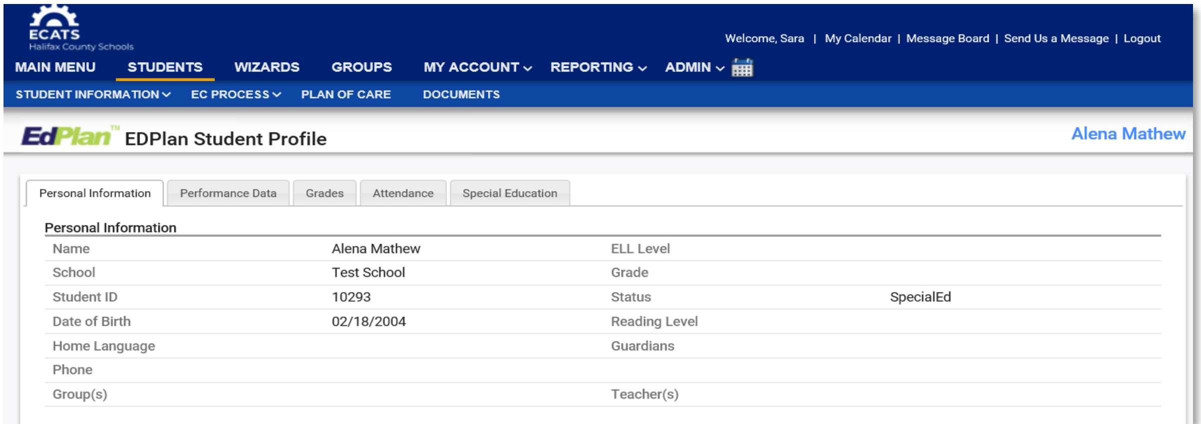
STUDENT INFORMATION

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.

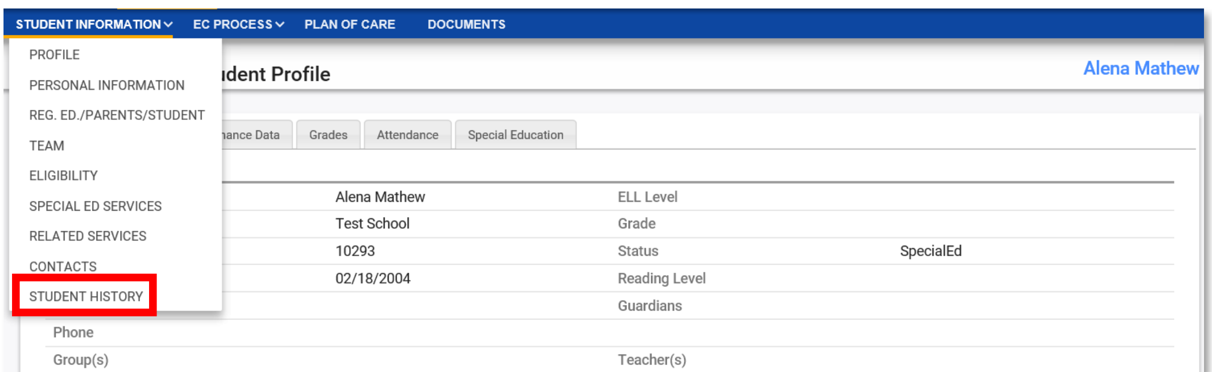


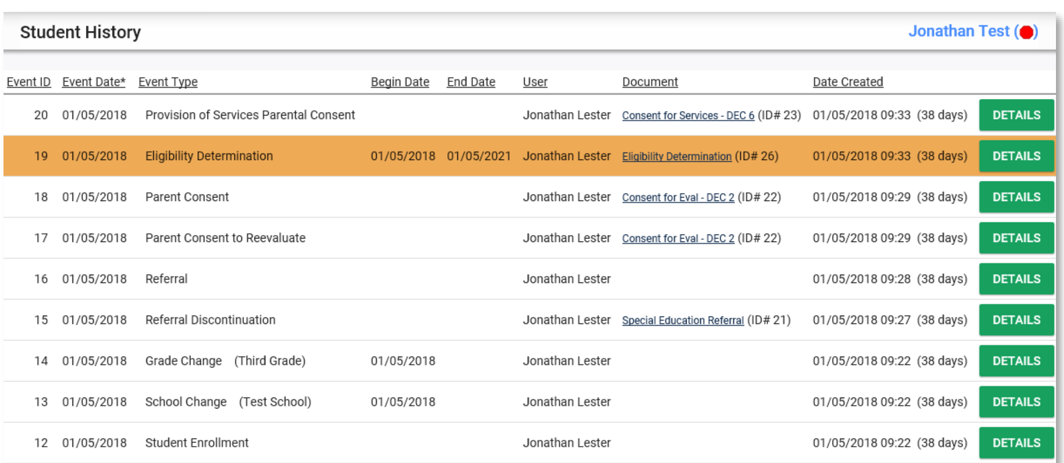


2) Clicking on the student's name will direct the user to the student's "Student Profile" page. Here users can access documents and view student information including but not limited to student history, eligibility information, current IEP, etc. The information visible may depend upon your user role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



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



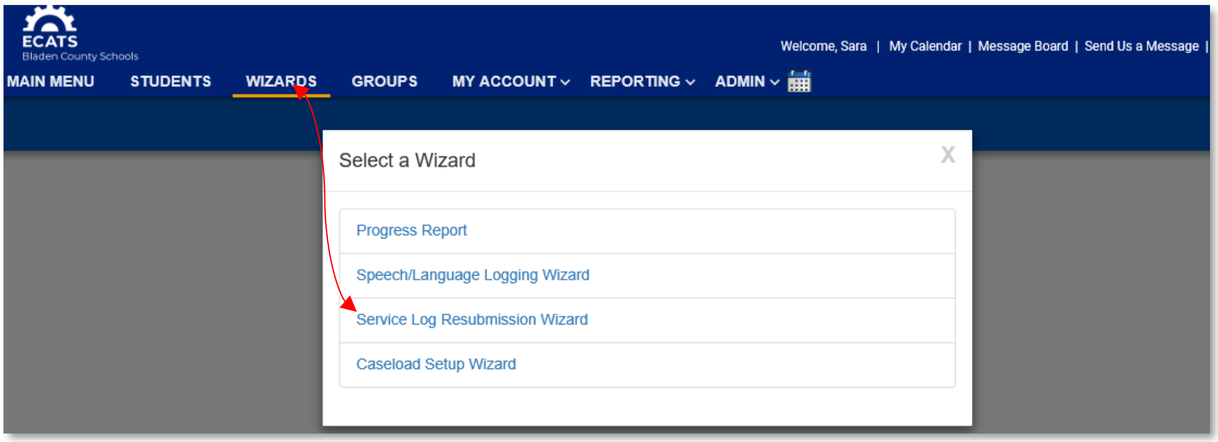


Student History — Jonathan Test

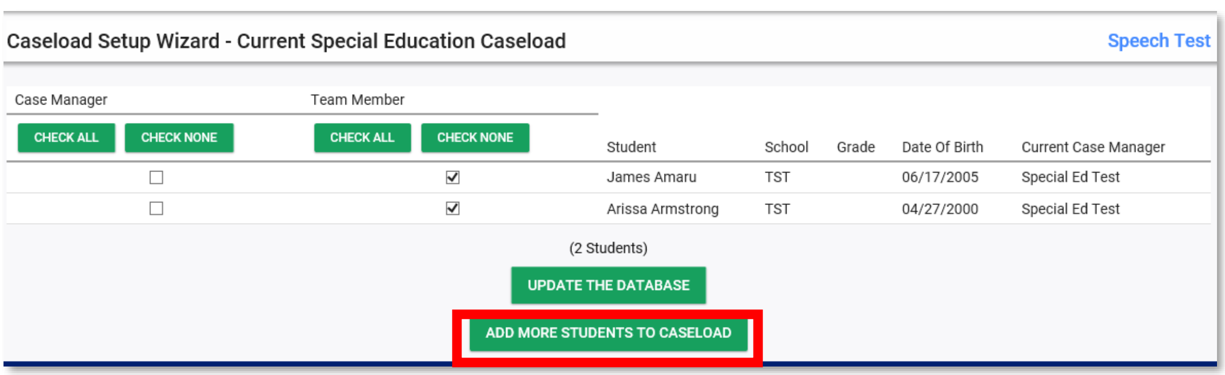
Event ID	Event Date*	Event Type	Begin Date	End Date	User	Document	Date Created	
20	01/05/2018	Provision of Services Parental Consent			Jonathan Lester	Consent for Services - DEC 6 (ID# 23)	01/05/2018 09:33 (38 days)	DETAILS
19	01/05/2018	Eligibility Determination	01/05/2018	01/05/2021	Jonathan Lester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

SERVICE DOCUMENTATION CASELOAD SETUP

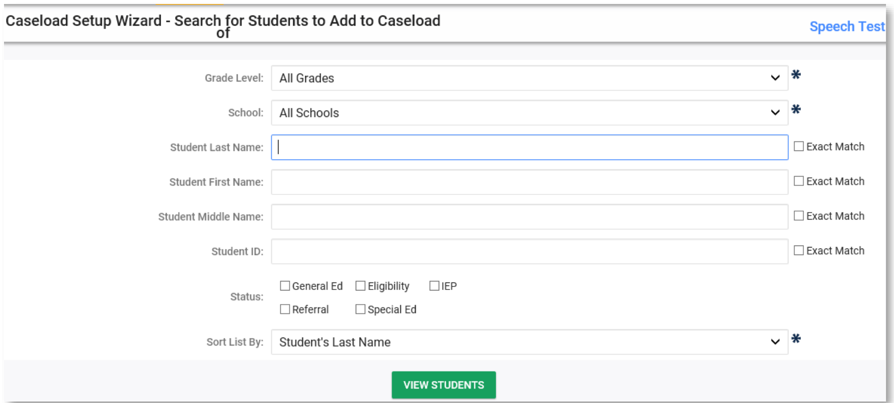
1) From the Main menu page, click on the “Wizards” tab and select the “Caseload Setup Wizard.” Click on the “Go to Users Caseload” button and if prompted to select a user’s caseload domain, select “Special Education.” Click the “Go to Users Caseload” button.



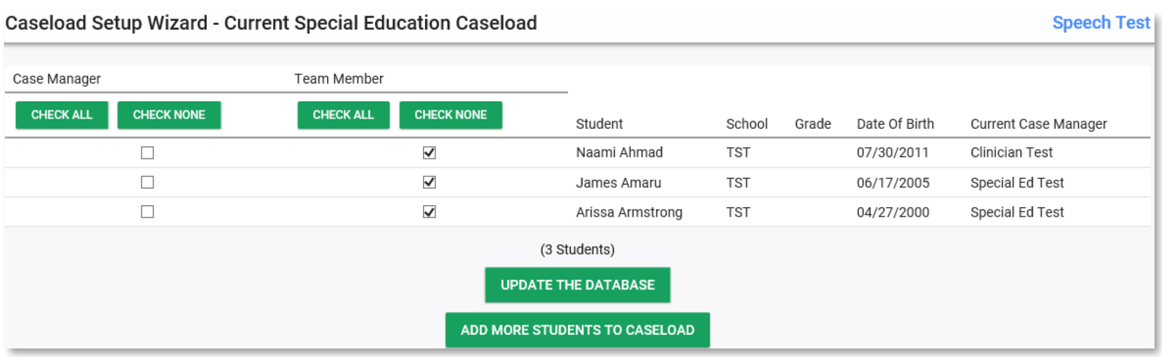
2) Click the “Add More Students to Caseload” button.



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.

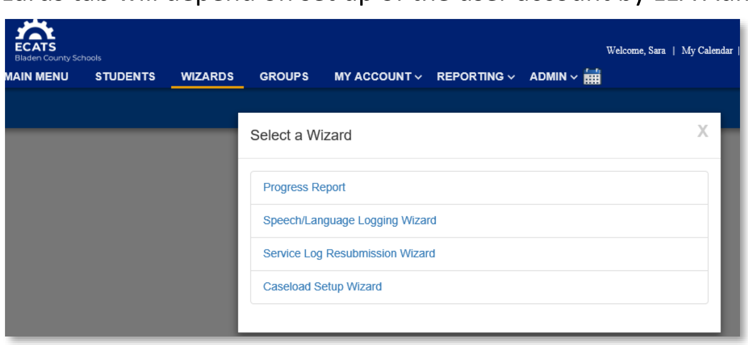


4) Check the “Team Member” or “Case Manager” (if applicable) check box next to the student(s) you would like to add to your caseload. Do not check both boxes for the same student. If applicable, you may have a button to add a Related Service to the IEP record upon placing the student on your caseload.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

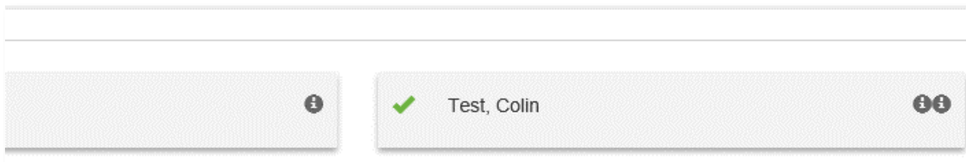


SERVICE DOCUMENTATION WIZARD SETUP

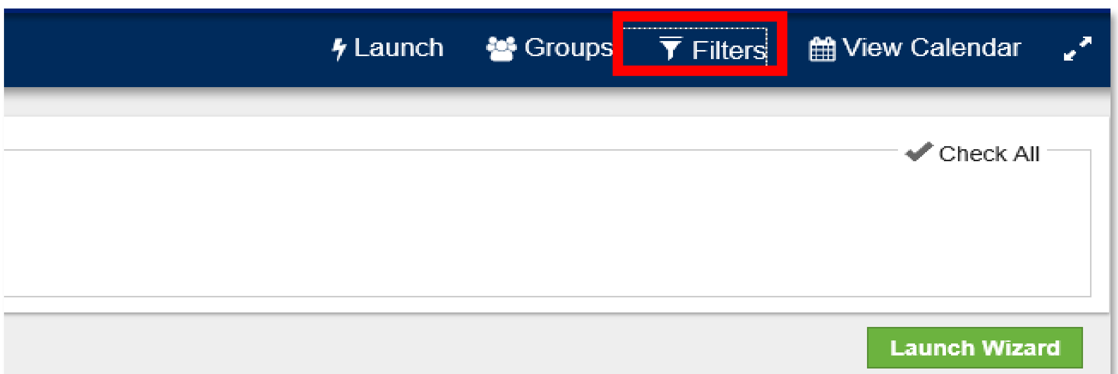
1) To log services for students, select the appropriate logging wizard from the “Wizards” tab. Access to Wizards tab will depend on set up of the user account by LEA Administrators.



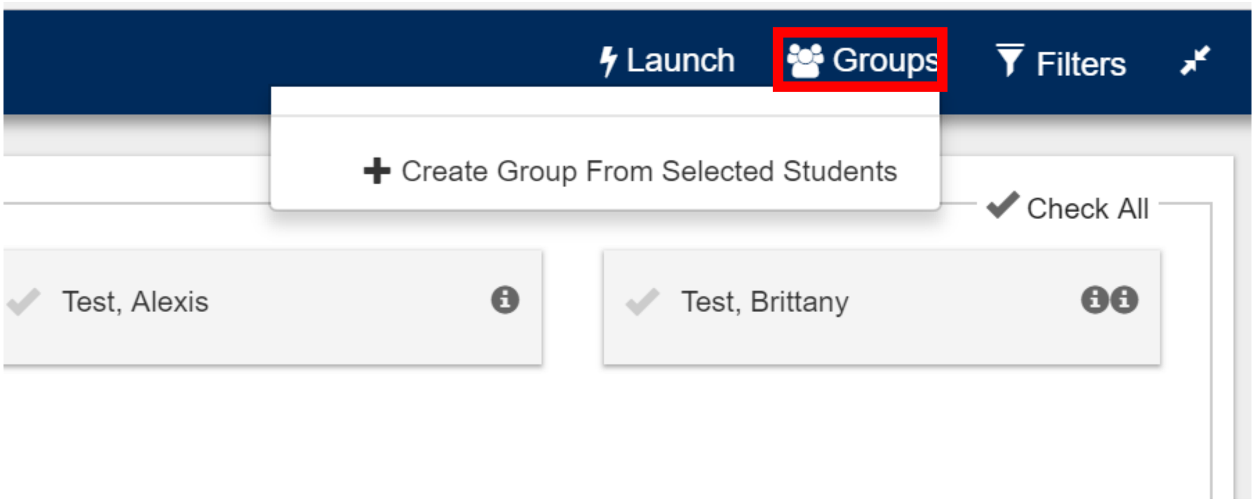
2) On the next screen you will see a listing of the students on your caseload with services available for logging. Select the student you want to document for by clicking the check mark next to the student's name. The check mark will turn green when the student is selected. The "I" (idents) can be used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



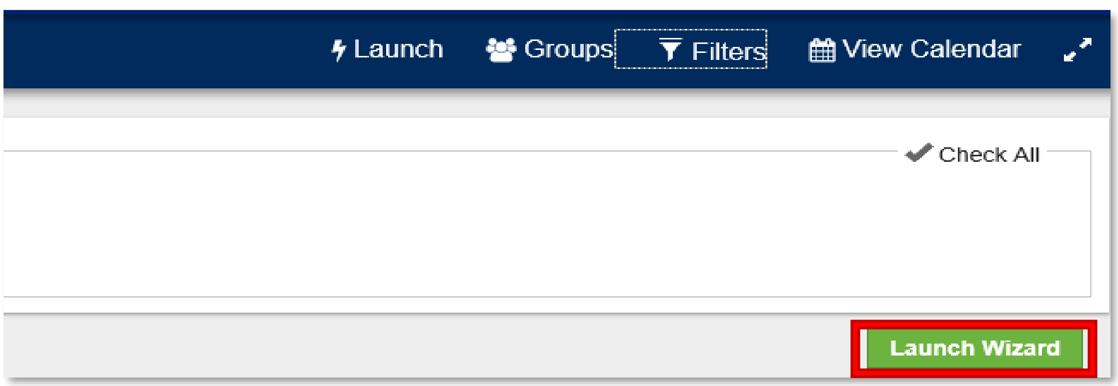
3) You can filter your caseload to help identify which students you want to document for (i.e., by school).



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

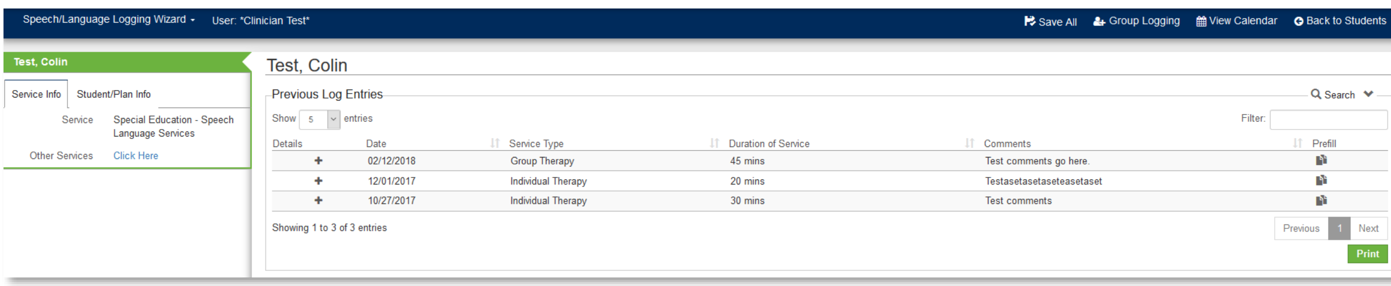


5) Once you have selected the student(s) you want to document for, click the “Launch Wizard” button located at the bottom of the screen.

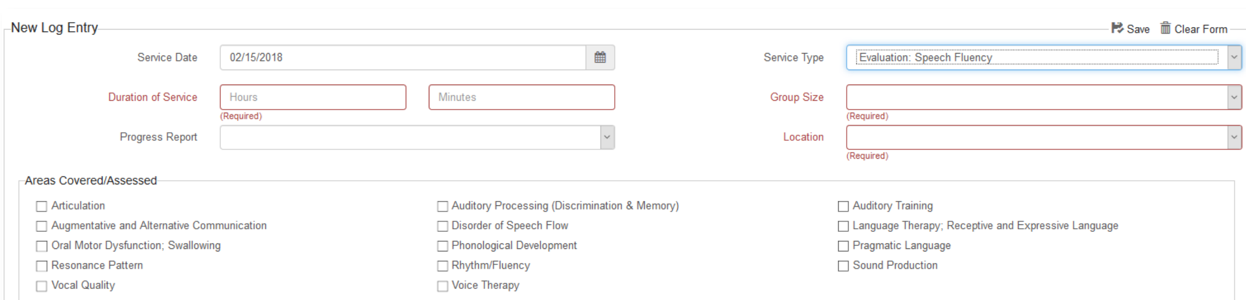


SERVICE DOCUMENTATION LOGGING WIZARD

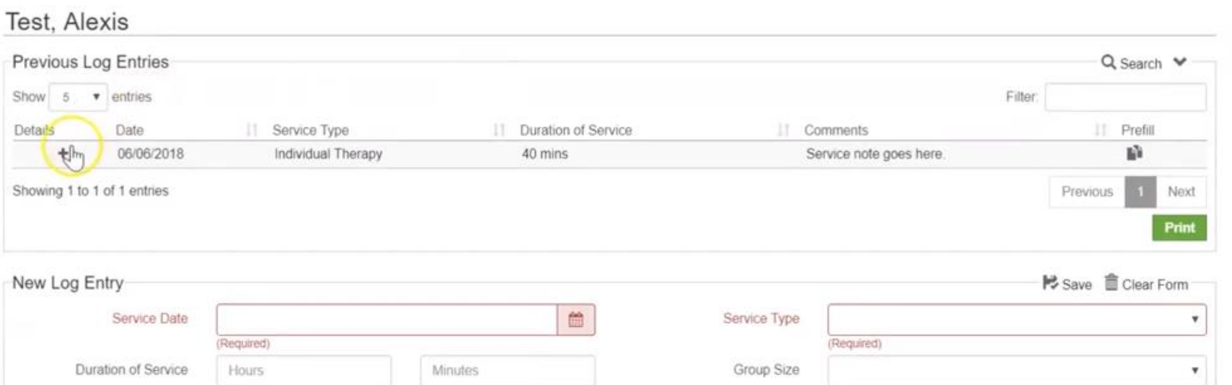
1) Service/Plan info about the students selected for documentation on can be located next to their name on the left hand of the screen in the green navigation bar. Any previously logged sessions on this student by you or another clinician in your discipline will appear above the logging wizard in the 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.



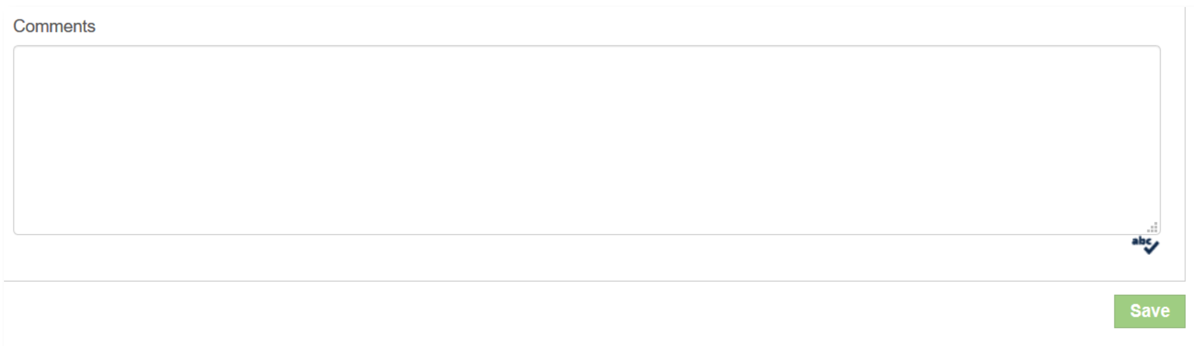
2) Enter required information into the logging wizard. Date, service type, and duration of service are required fields. The service type drop down menu is where you select the service that was delivered whether it was treatment, an assessment, an absence, or other types of services Additional fields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



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.



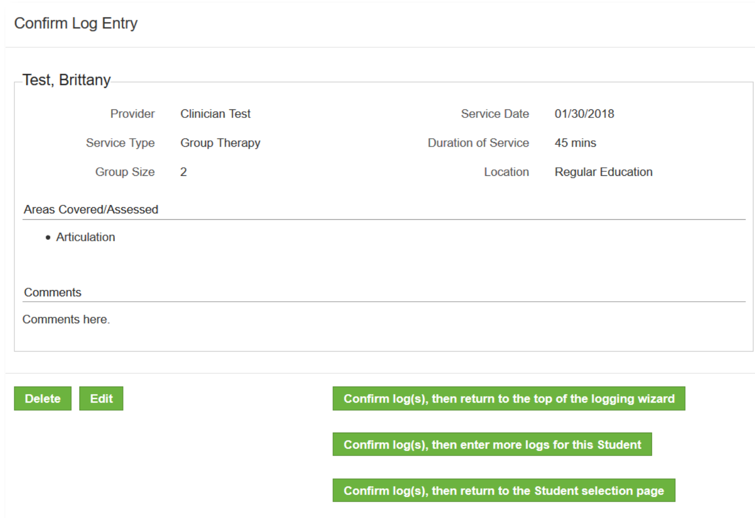
4) Enter service note information into the comments section of the logging wizard. Spell check is available for you to use under the comments text box.



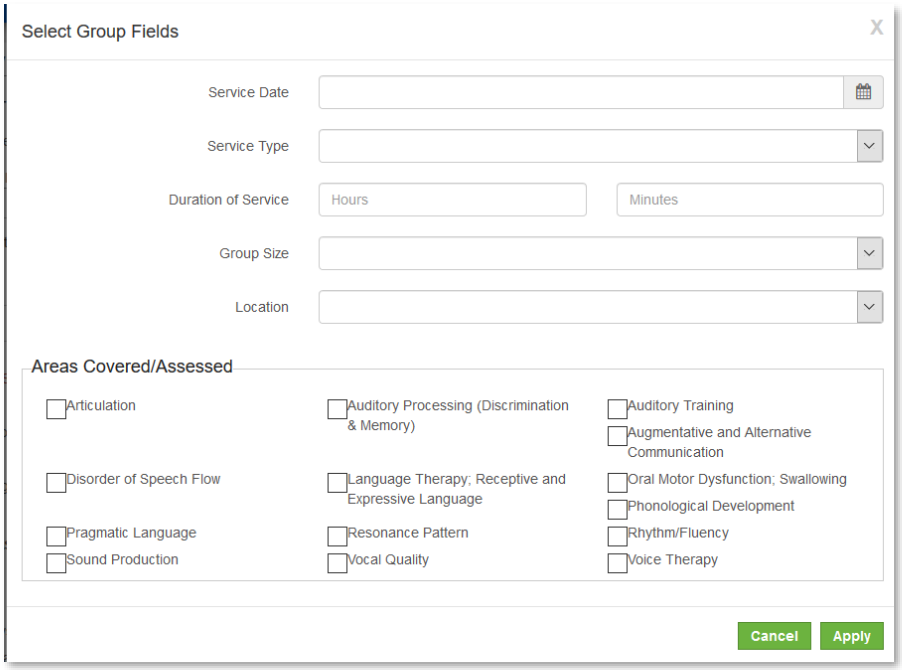
5) Once you are done entering service information for a student, click the “Save” button below the “Comments” box, or you can continue to log for additional students on this screen if you selected more than one student to document on. Once you are done logging all services, click the “Save All” button 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.

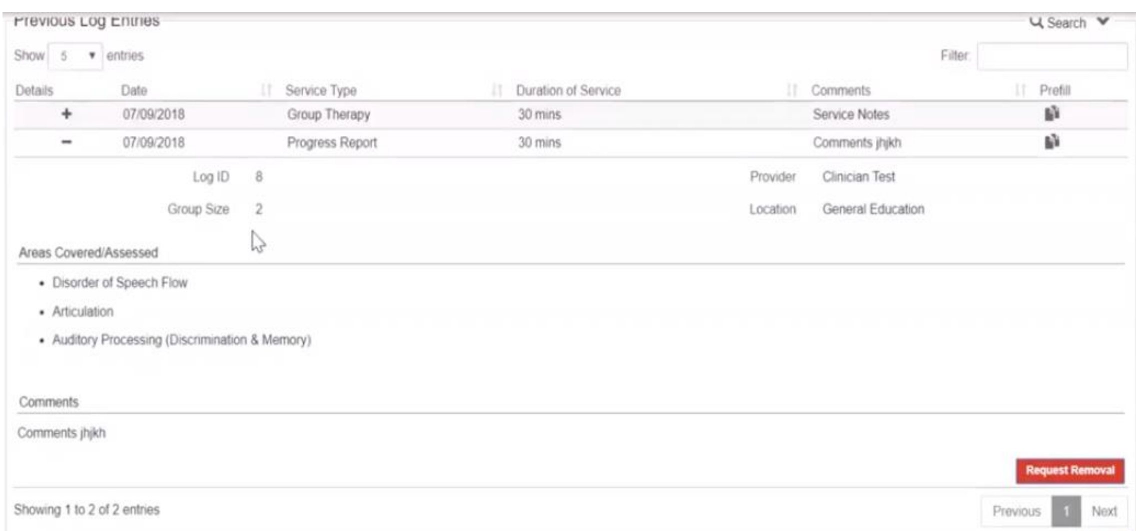
7) A confirmation message will display asking you to confirm the information you entered. You have the option to delete the note, edit the note, confirm the note and return to the top of the logging wizard, confirm the log and enter more logs for the student you are working on, or confirm the logs and return to the student selection page.



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.

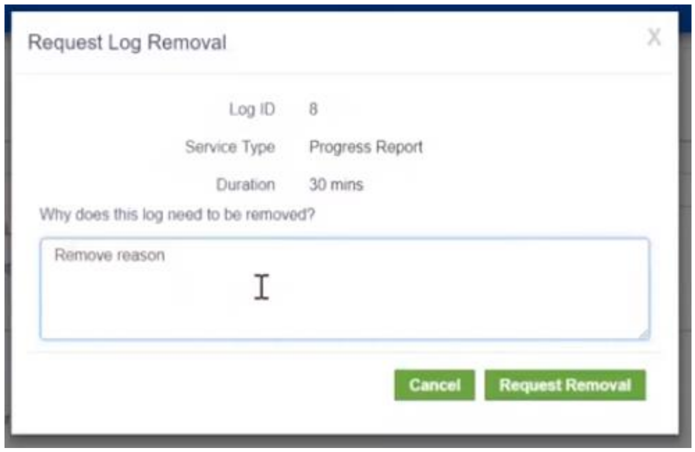


9) To delete a service log, first find it in the "Previous Log Entries" table. Next, expand the entry with the "+" button. Once you have the correct service selected in this table and expanded, you should see a red button titled "Request Removal", click this button and you will be prompted to enter the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



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

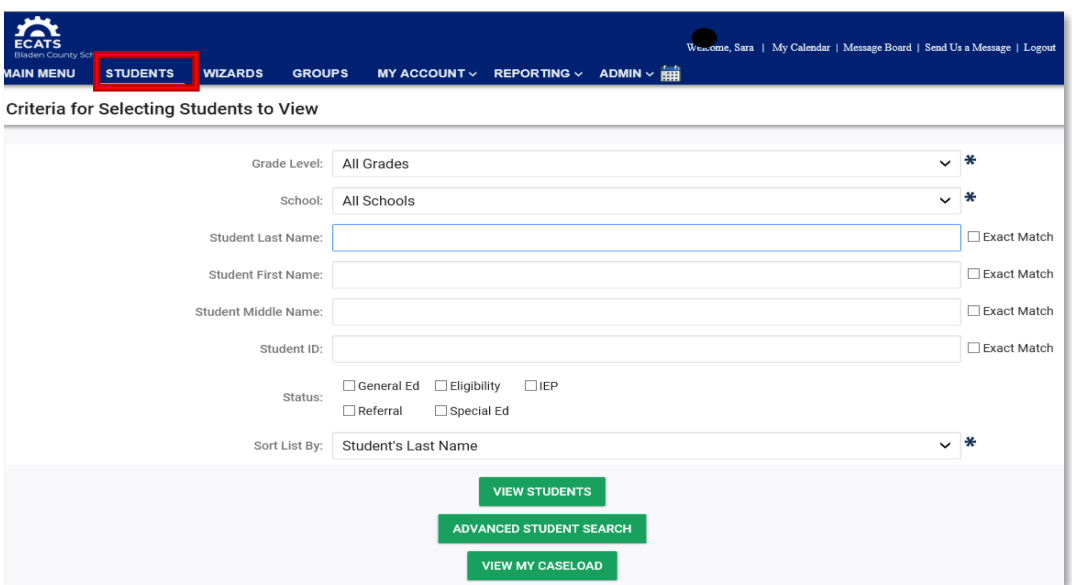
"Previous Log Entries" table until the log has been processed and deleted by the ECATS team.



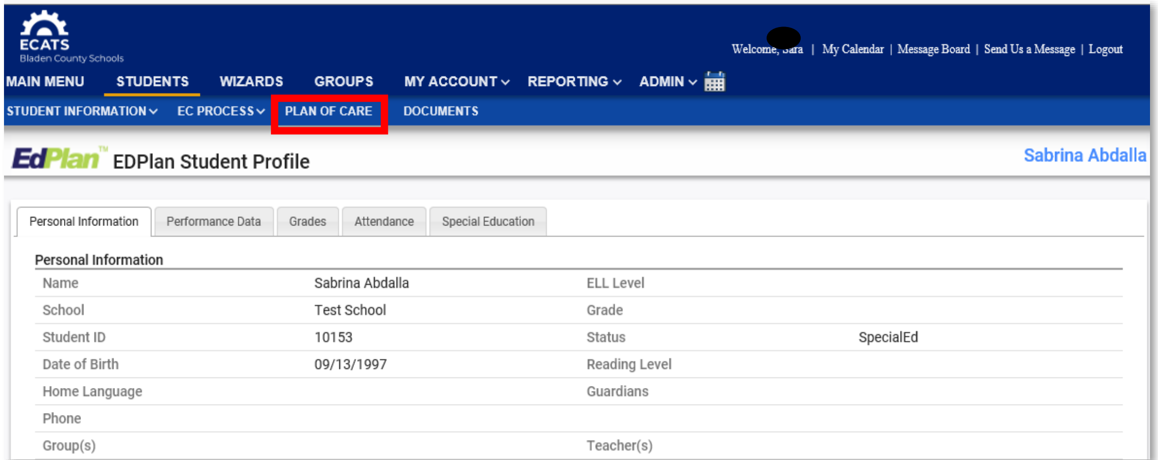
11) Once the service log deletion has been processed, the entry will be removed from the table and you will receive a message in the "My Inbox" or "Message Center" confirming that the record has been removed

PLAN OF CARE (POC) DOCUMENT

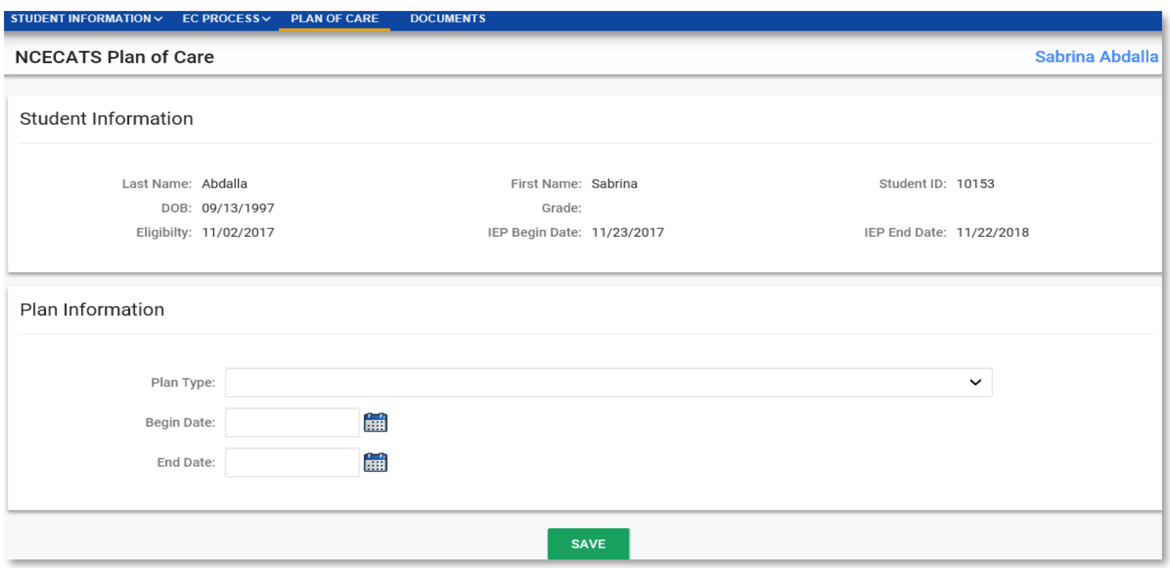
1) Create a Plan of Care document for a student by clicking on the "Students" tab and searching for the student or clicking the "View My Caseload" button at the bottom of the screen. Once you have found the student, click on their name and you will be directed to their "Student Profile" page.



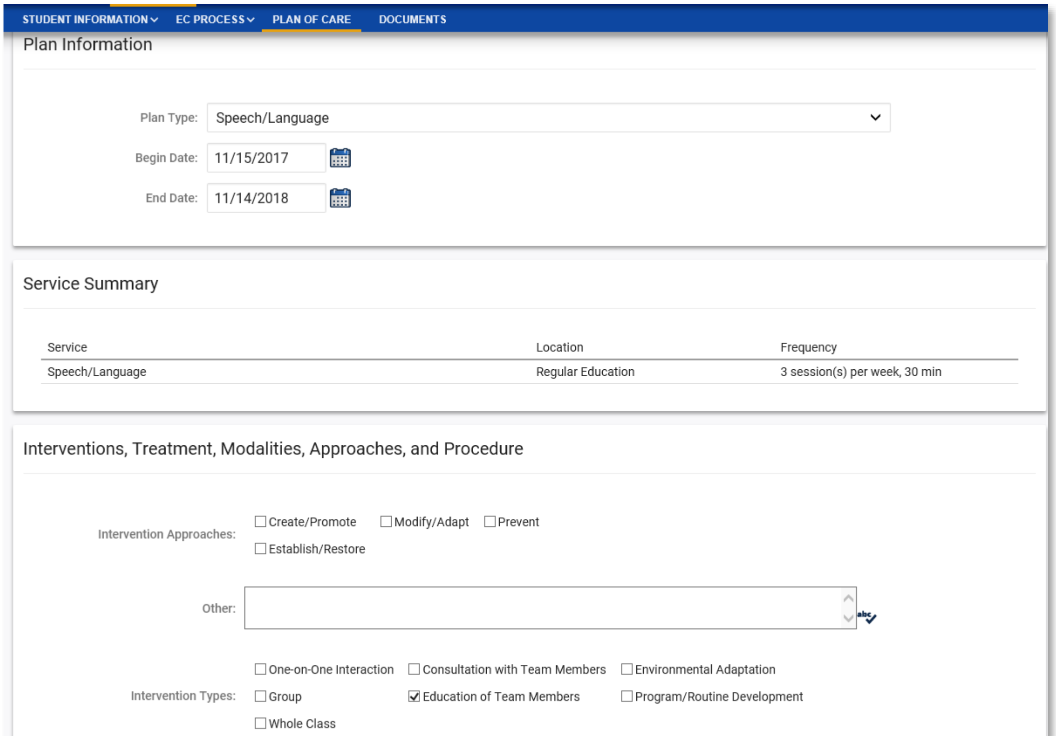
2) Click on the “Plan of Care” tab to create a plan of care for the student.



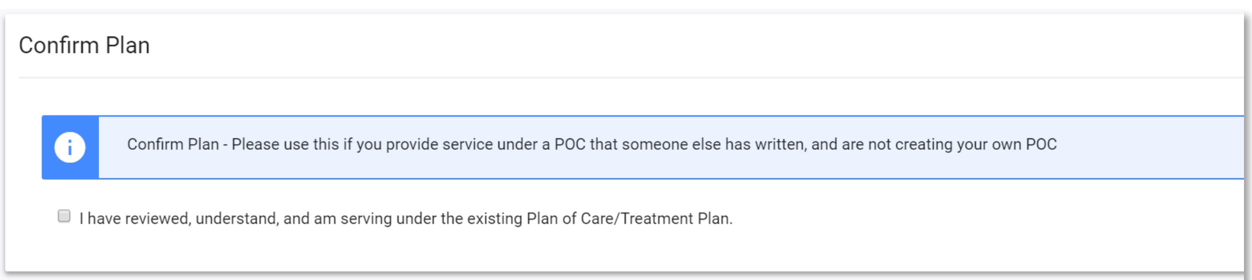
3) To start writing a Plan of Care, first select the appropriate Plan Type and enter the begin and end dates for the Plan of Care. Access to the relevant Plan Type is determined by LEA Administrators for each user.



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

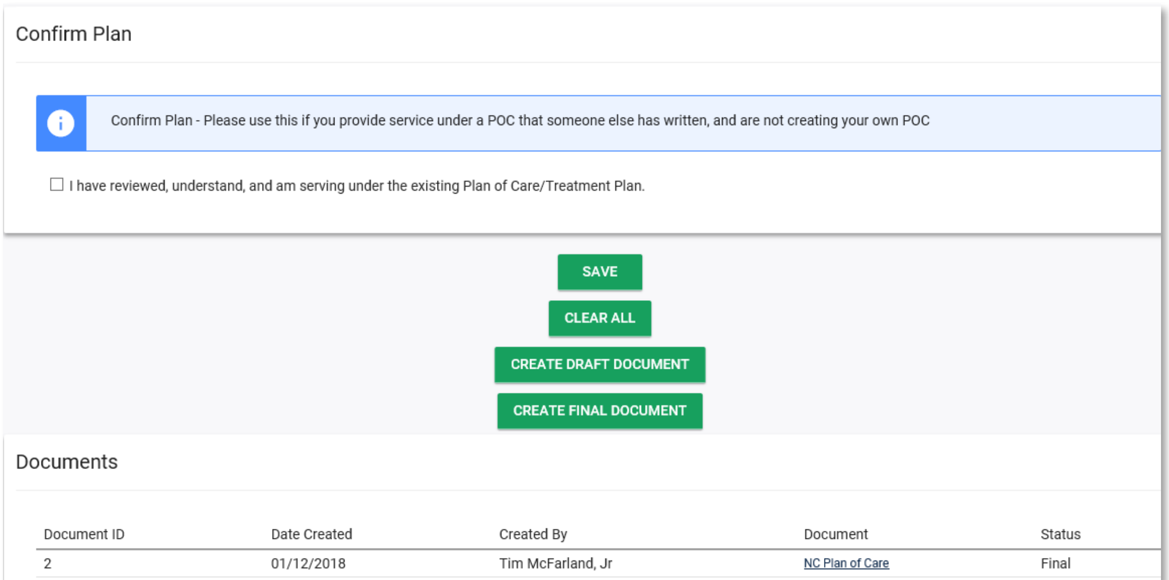


5) Once you filled out all the sections that apply to your Plan of Care, scroll to the bottom of the page. If you are reviewing the Plan of Care created by another provider and are not creating your own Plan of Care, or if you are being supervised by another therapist, select the option indicating "I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



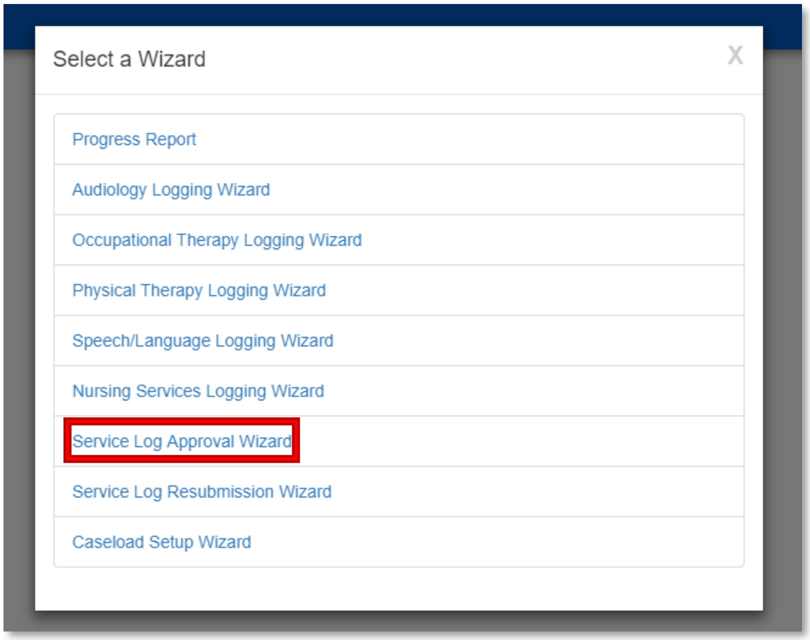
6) At the bottom of the page, you have the option to save your work, clear the template, create a draft or final document. Once you have finalized the Plan of Care, click the "Create Final Document" button. Click on the blue hyperlink under the Document header to view a PDF of the final document. This 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.

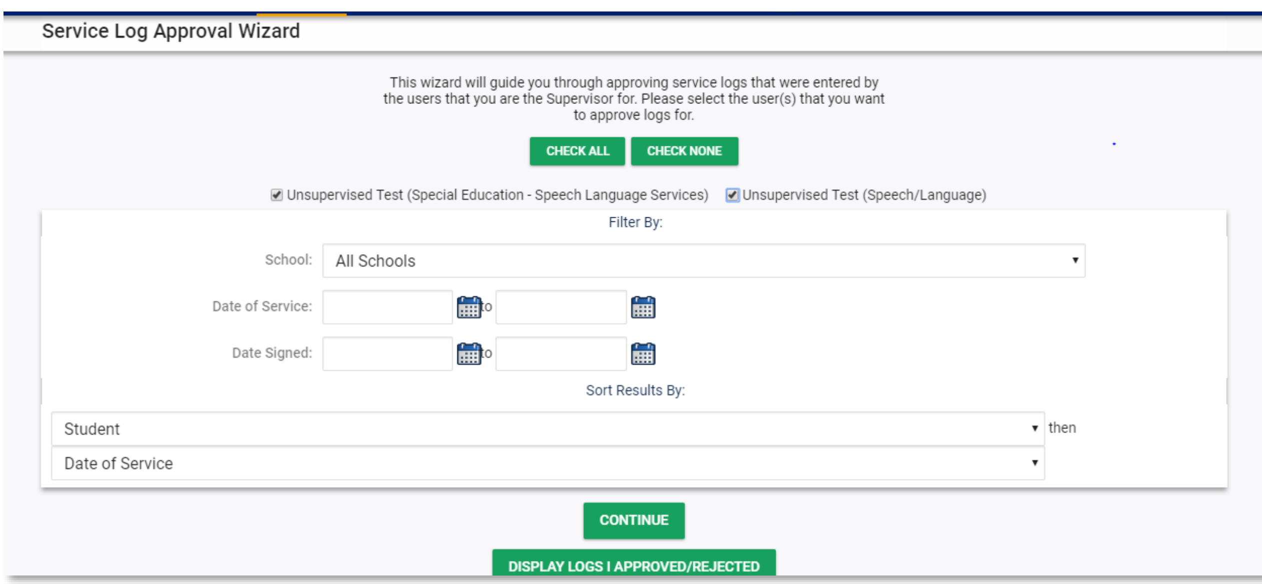


SERVICE LOG APPROVAL PROCESS

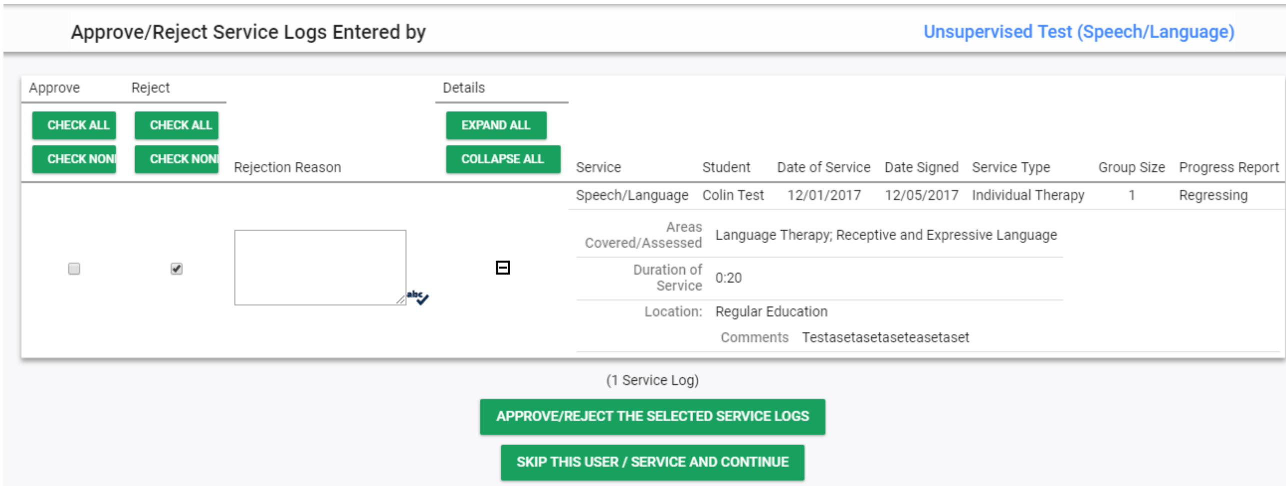
1) The Service Log Approval Process is used for those therapists who require a supervisor to approve their service logs. The setup of Supervisor-Supervisee relationships may be found in more detail in the Service Documentation Administrator manual. After a supervisee has entered a log through the Wizards,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



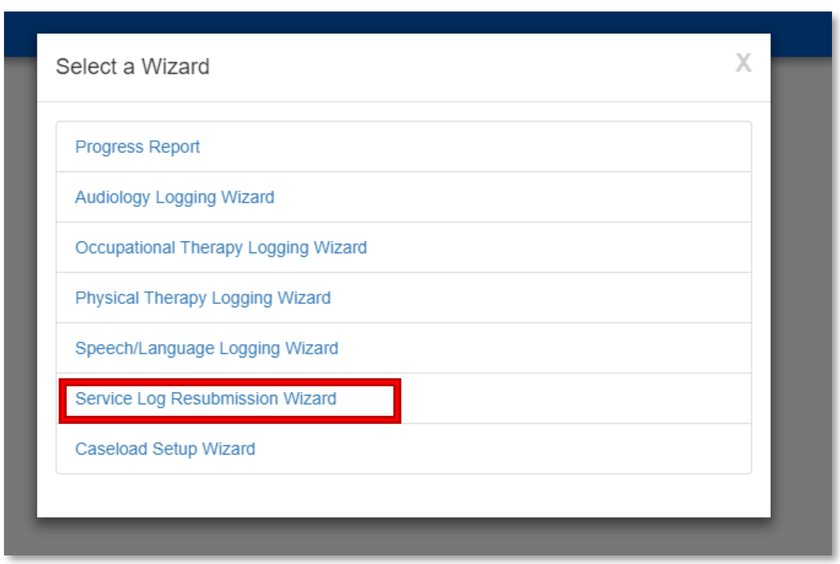
2) Once the "Service Log Approval Wizard" is opened, the Supervisor can filter by numerous parameters to look only at a subset of services to approve such as: schools, date range by service, and date range by signed date. Once you have selected your parameters click the "Continue" button.



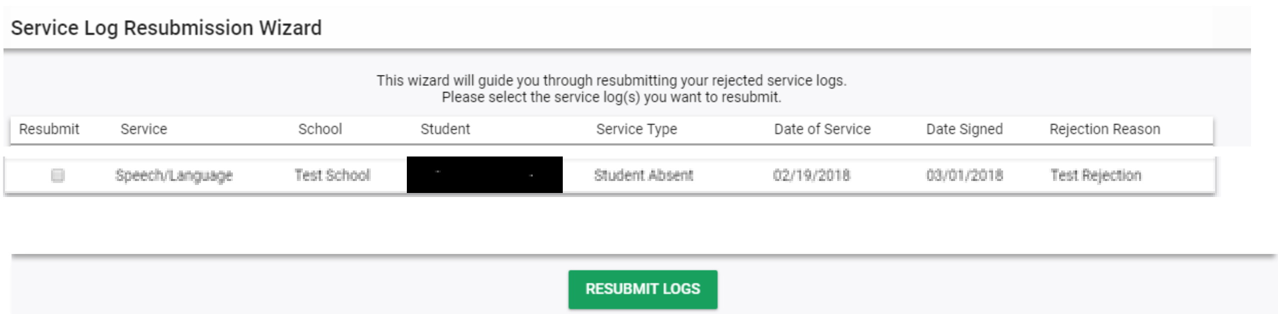
3) Any pending logs will display with the option for the Supervisor to reject or approve each log. If rejected, the Supervisor can enter a reason before sending the log back to the Supervisee. Once you have made your selection to approve or reject, click the “Approve/Reject The Selected Service Logs”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



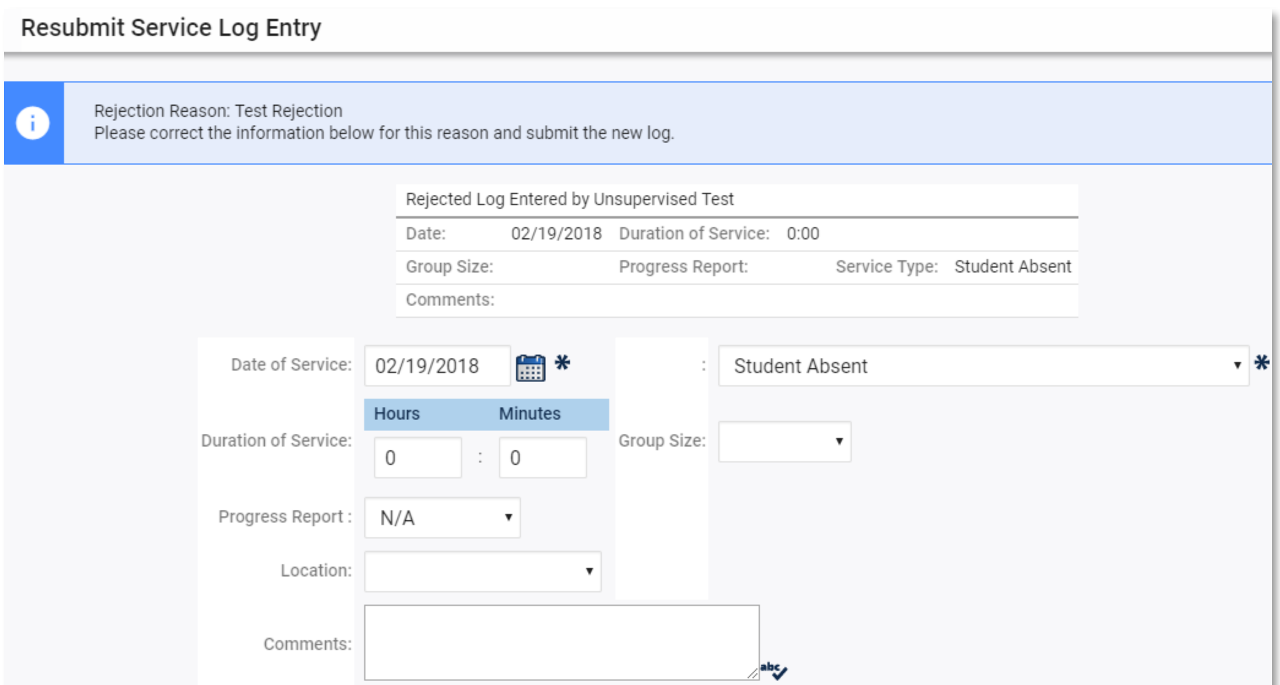
4) If any logs are rejected, the Supervisee can resubmit the logs by navigating to the “Service Log Resubmission Wizard”:

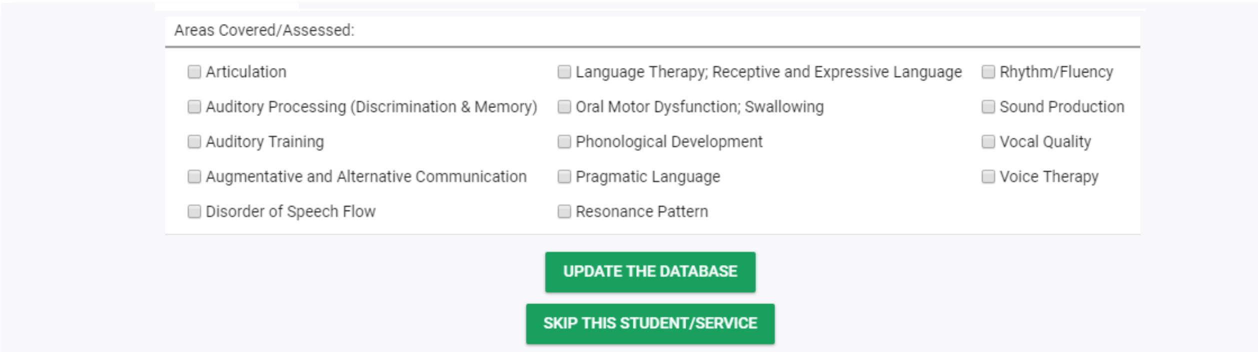


5) You will see a list of service logs that have been rejected. Click the checkbox under "Resubmit" and then click "Resubmit Logs"



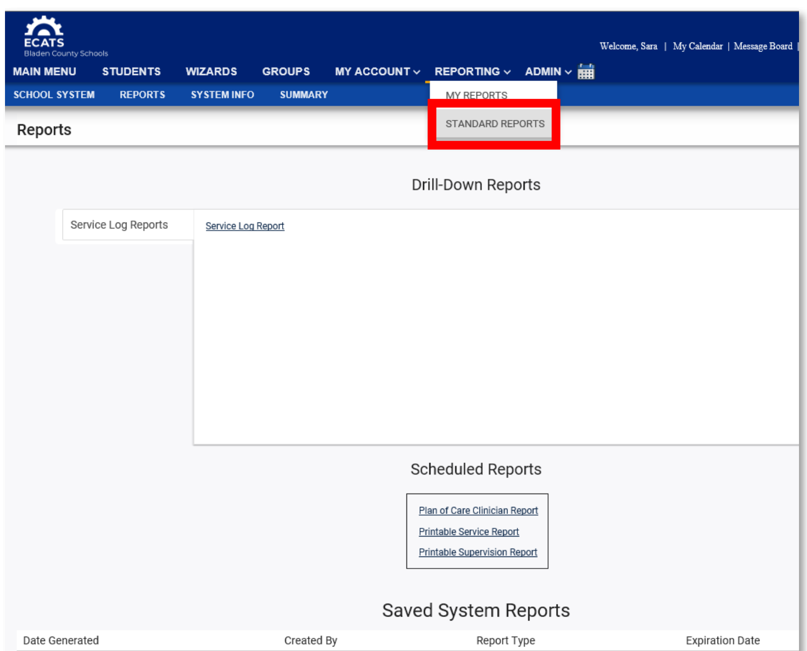
6) At the top of the screen you will see the reason the log was rejected, if indicated by your Supervisor. Make any necessary corrections in the form below, then click "Update the Database".~~Once the Supervisee selects a log and chooses "Resubmit Logs" they will be taken to a screen to complete the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



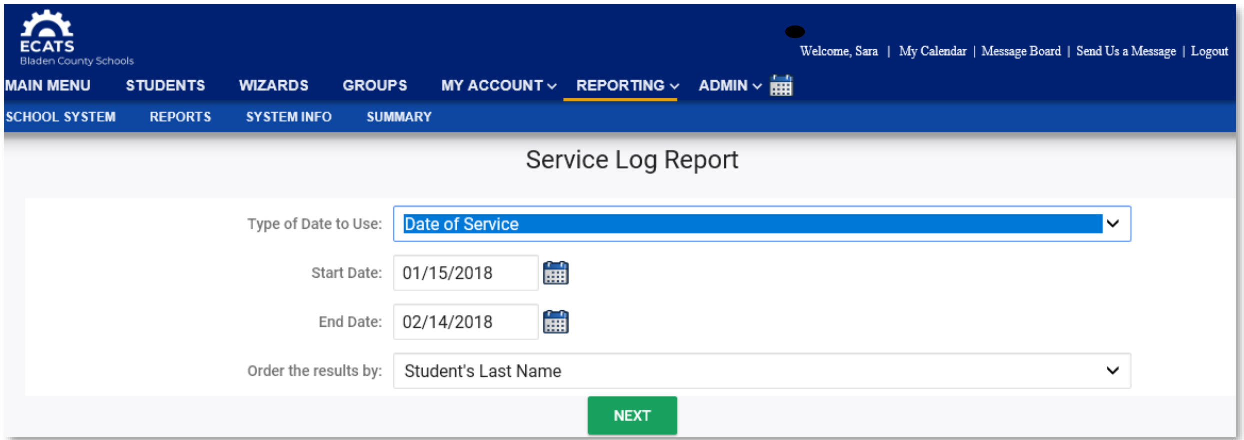


CLINICIAN REPORTS

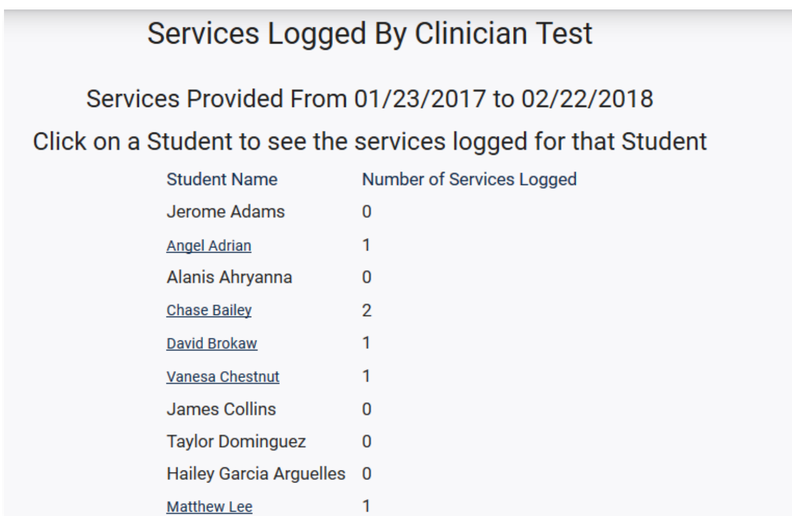
1) Users can create many kinds of reports by hovering over the "Reporting" tab and selecting "Standard Reports". The two most basic of which are the **Service Log Report** and the **Plan of Care Clinician Report**.



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.



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

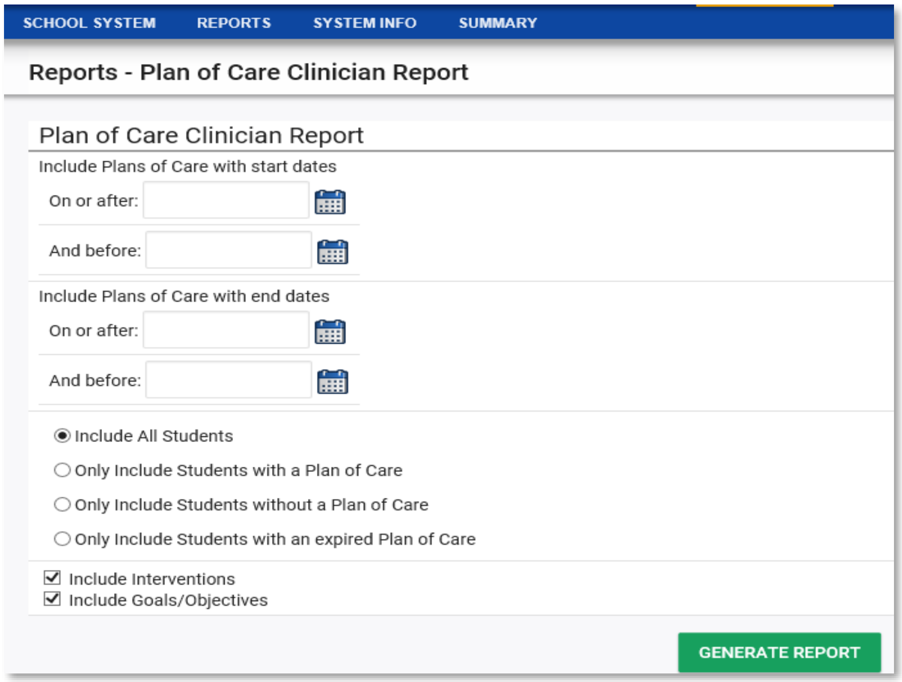


4) To delete a service entry, run a "Service Log Report" and after clicking on the student name, click the "View" button next to the date of service you want to delete. Click the "Request Deletion" button on the left side of the screen, provide the reason for the deletion request and proceed to the confirmation screen. Confirm that you want to delete the service.

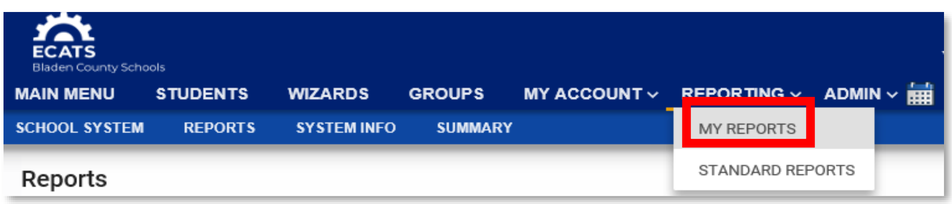
5) After you have requested to have the service deleted, the session will display a red **X** in the "Request Removal" column. The **X** will remain until the log has been deleted by the ECATS team.

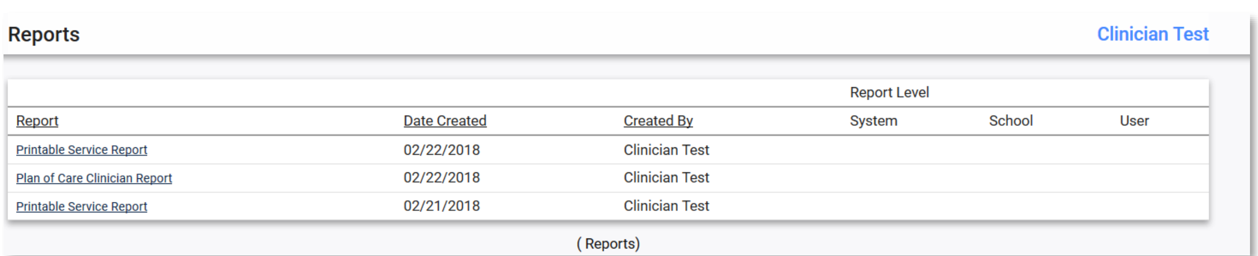
6) To run the "Plan of Care Clinician Report," navigate to the "Standard Reports" page and click on the "Plan of Care Clinician Report." Enter the date parameters and select which types of

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.



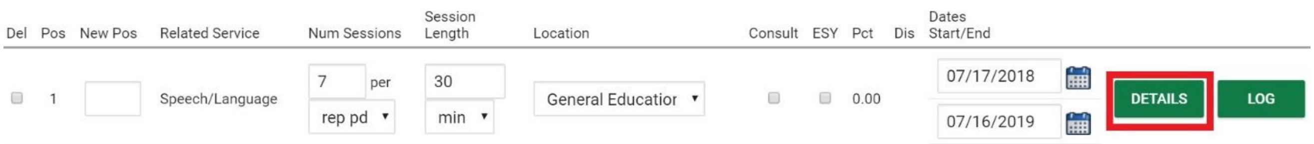


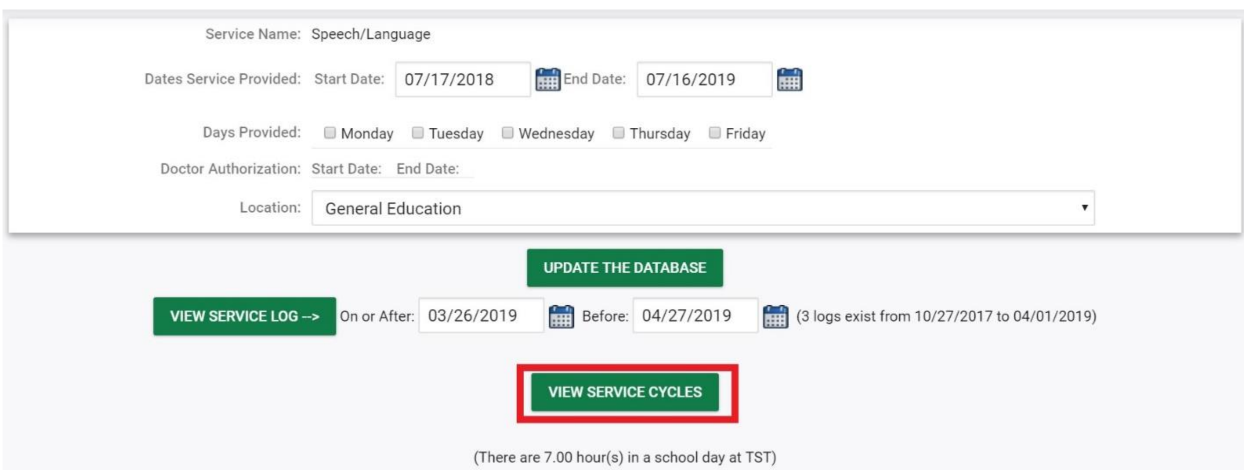
Report	Date Created	Created By	Report Level: System	School	User
Printable Service Report	02/22/2018	Clinician Test			
Plan of Care Clinician Report	02/22/2018	Clinician Test			
Printable Service Report	02/21/2018	Clinician Test			

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

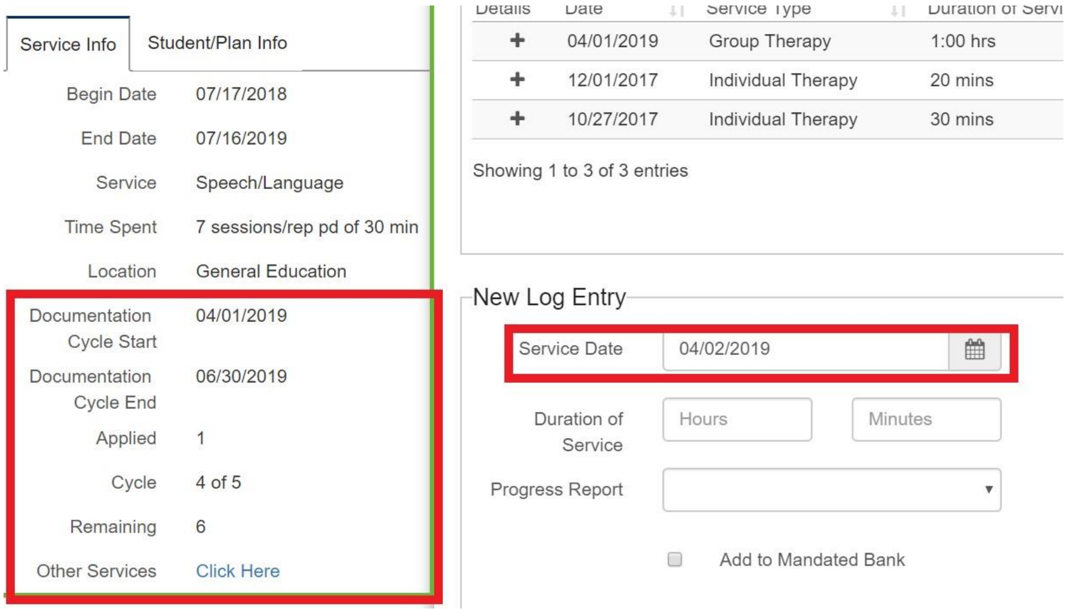




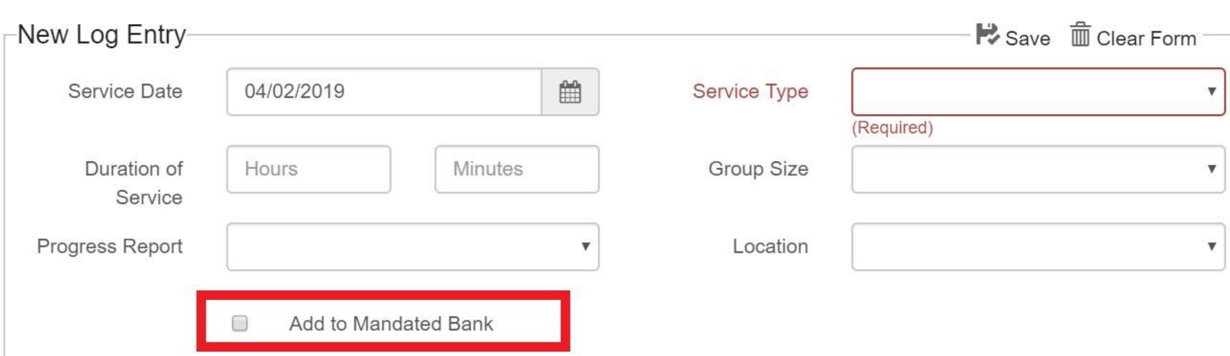
    c. From here, you can see the number of mandated services that have yet to be logged in the “Available” column
    d. The “Logged” column shows how many logged services have been applied to the mandated bank for that documentation cycle

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



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



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