Service Capture on a Student not on Caseload

This is the third route for Service Capture

Service Capture is a student profile

1. Search Student
2. Go to Student Profiles – Service Record Profile
   a. Action: Hover over the diagonal arrow to see all profiles
   b. Action: Go to Service Records and click on it
3. How to open a new Service Record
   a. Action: Click on the + next to “Add New Service Record”
   b. A Service Record Form should open up
4. How to work within the Service Record
   a. Action: Staff Field – use the lookup link on the right to find yourself
   b. Action: Service Field – use the drop down to select your role
   c. Action: Service Date Time: Input Date and Time
   d. Action: Duration Minutes: Input minutes
   e. Action: Service Type – Select appropriate type
   f. Action: Progress Report: Use drop down to select
   g. Action: Provider Notes – type a summation of services delivered – give a good picture for the next reader
   h. Action: Has this service been completed – check the box
   i. Action: Click on Green Action Button – Accept Changes
5. Having issues?
   a. If your security group within PSE is set for location wide you will need to make sure you have access to the building that your student is attending.
   b. On your homepage of PSSE – under your PSE icon on the toolbar you may find Select Location. You will need to select the building your student is attending.

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