

# GREENBUSH

THE EDUCATION SERVICE CENTER

## **Online Documentation for Medicaid Claiming in Early Childhood and School Based Programs**

Greenbush Access

<https://www.greenbush.org/167/Medicaid-Billing>

CompuClaim Access

<https://serviceportal.compuclaim.com>

Client ID: Greenbush

Billing Office Help Desk

888-654-8701

Support Services

[marlene.willis@greenbush.org](mailto:marlene.willis@greenbush.org)

[amy.geier@greenbush.org](mailto:amy.geier@greenbush.org)

[amanda.murphy@greenbush.org](mailto:amanda.murphy@greenbush.org)

[angie.hammonds@greenbush.org](mailto:angie.hammonds@greenbush.org)

[beatrice.fontelroy@greenbush.org](mailto:beatrice.fontelroy@greenbush.org)

[missy.joliet@greenbush.org](mailto:missy.joliet@greenbush.org)

[monica.murnan@greenbush.org](mailto:monica.murnan@greenbush.org)



## Services Portal Handout:

### Therapists / Service Providers

#### Web site and Logging In

<https://serviceportal.compuclaim.com>

**NOTE:** Client ID and Password are Case sensitive

**Client ID:** Greenbush

**Email:** Your Email Address

**Password:** Password Assigned By Greenbush

Client ID  
Greenbush

Email

Password

Remember me

Login

[Forgot your password?](#)

#### **Passwords:**

Password must be at least 7 characters long, have at least one uppercase letter, at least one lowercase letter, and at least one number.

#### **Resetting password:**

Please add [notification@meduclaim.com](mailto:notification@meduclaim.com) to your "Safe Senders" list within your email application to help avoid this notification being tagged as SPAM.

To reset your Service Portal password, please follow these instructions:

- From the Service Portal logon screen, click "Forgot your password?" [Forgot your password?](#)
- Enter Client ID: Greenbush and E-mail Address. Click *Continue* to start the password recovery process.
- You will receive confirmation that a "new *random* password has been created and sent to your e-mail".
- Access your email application. Look for the "CompuClaim Service Portal Login Information" email and open. Your temporary password will be inside.
- Go back to the Service Portal window and click "Return to Login Page".
- Enter your Client ID, Email Address, and New temporary password. Click Login.
- You will be prompted to create a new password that must be different than your old password; at least 7 characters long; have at least one uppercase letter; at least one lowercase letter; and at least one number. You may not re-use any previous password for 180 days.
- Click *Continue* to confirm new password change. If successful, you will be entered into the Service Portal.

## Navigating the Site

The top right corner of the Services Portal displays the Navigational Links that are available continuously throughout the system.



Announcements



- **My account – change password** [My Account](#)
- **Log out – ends your session** [Logout](#)
- **Home – Always brings you back to Home page** [Home](#)
- **Wizards contain links to a variety of tasks** [Wizards](#)
  - **Service Log by Student – Adding and Deleting Service Logs**
  - **Supervision Log – Lists the providers that the logged in professional are required to supervise and the students' Service Logs**
- **Reports – Live Reports can be saved or printed** [Reports](#)
- **Manage Caseload - staff can easily add/remove students from their caseload** [Manage Caseload](#)
- **Help – customizable by admin user** [Help](#)

## Caseload on Home Page

Caseload – Students will appear in **BOLD** or regular font. **BOLD** font indicates student with a Medicaid ID number.

- **Manage Caseload link** - from “Manage Caseload” link



My Caseload
Aguillon, NICOLE : 5489632180
Anderson, DOUGLAS : 334455689
Badovinac, Lauren : 6541258759
<b>BAILEY, MAGGIE : 4587533189</b>
BAILEY, Troy : 6214785422
BAIRD , Andrew : 2135487952

Bold = Only Medicaid eligible

From the caseload, click on the student's name to view detailed information regarding the student, which is organized under tabbed headings:

- **Student** – student's demographic info
- **Special Education** – IEP info (bulk import or manually entered)
- **Service Logs** (there is a button available here for navigating to logging calendar)
- **Supervision Logs**

The screenshot shows the 'Service Portal' header and 'Student Information' for Aguilon, NICOLE D. The page has tabs for Student, Special Education, Service Logs, Monthly Summary, and Supervision Logs. The 'Student' tab is active, displaying the following information:

- District: Transylvania
- School: Transylvania HS
- First Name: NICOLE
- Middle Initial: D
- Last Name: Aguilon
- Birthdate: 1/1/2000
- Gender: Female
- Ethnicity:
- Grade:
- Street Address: 1234 My Favorite Street
- City: Grand Rapids
- Zip: 49525
- Phone: (616) 555-1234
- Resident District:
- Parent Name:

## Managing a Caseload

To Add Students to your caseload:

- Make sure the "Only show students on my caseload" box is not checked.
- Search for the student you need to add by typing the first few letters of the student's last name in the search box and click on "Search". For best results, keep the search as broad as possible in order to capture more students in the search.
- When you locate the student, click on "Add" next to the student's name.
- Click on "Home"  in the toolbar when finished and you will see your updated caseload.

The screenshot shows the 'Manage Caseload' interface. At the top, there are filters for District, School, Results Per Page, and a Search button. Below the filters are input fields for Last Name, First Name, and State's Student ID. There are checkboxes for 'Only show students on my caseload' (unchecked) and 'Only show active students' (checked). A table of students is displayed below, with columns for District, State Student ID, Last Name, First Name, Middle Initial, Birthdate, Gender, School, Grade, and Active. The first student in the table is Aguilon, NICOLE. An arrow points to the 'Add' button next to her name. At the bottom right, there is an 'Export to Excel' button and a page number '1 2 3 4 5 6 7 8 9 10 ...'.

	District	State Student ID	Last Name	First Name	Middle Initial	Birthdate	Gender	School	Grade	Active
	Transylvania	5489632180	Aguilon	NICOLE	D	1/1/2000	Female	Transylvania HS		True
	Transylvania	334453889	Anderson	DOUGLAS	R	1/1/2000	Male	Transylvania HS		True
	Transylvania	6541258759	Badovinac	Lauren		1/1/2000	Female	Transylvania Elem		True
	Transylvania	4587533189	BAILEY	MAGGIE	M	1/1/2000	Female	Transylvania HS		True
	Transylvania	6214785422	BAILEY	Troy	M	1/1/2000	Male	Transylvania HS		True
	Transylvania	2135487952	BAIRD	Andrew	J	1/1/2000	Male	Transylvania HS		True
	Transylvania	6598745622	Bargenquast	AUBREE	A	1/1/2000	Female	Transylvania HS		True
	Transylvania	6458458895	BARR	AUDREE	L	1/1/2000	Female	Transylvania HS		True
	Transylvania	8624895995	BERGQUIST	Emily		1/1/2000	Female	Transylvania Elem		True
	Transylvania	9080706060	Berry	Fraunken	B	1/1/2012	Male	Transylvania Elem		True

To Remove Students that shouldn't be on your caseload:

- Click on "Only show students on my caseload".
- Click on "Remove" next to any student you need to delete from your caseload. (This will not delete the student from the system but will simply remove the student from your active caseload.)

## WIZARD: Service Log By Student

Services can be entered individually, group, or over multiple days



Click: Link for Wizard

Select Service Log by Student Wizard

Select one or more students or check Select All to enter service logs for all students and

then click next.

## Wizards



### Service Log by Student Wizard

Use this wizard to enter service logs for students on your caseload.

### Service Log by Student Wizard

Select one or more students to enter service logs for...

Select All Select None

Agallion, NICOLE: 549932180  Badoyvac, Lauren: 6541259759  BAILEY, MAGGIE: 4587533189  BAILEY, Troy: 6214785432  BAIRD, Andrew: 2135487952  
 Anderson, DOUGLAS: 334455589

Next >

## INDIVIDUAL Service Logging

This is to record a service, non-billable service, or absence.

Select One Day –

Then click Next

### Service Log by Student Wizard

BAILEY, MAGGIE M (1/1/2000)  
Transylvania

Prev Next

August 2017

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	5
6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	12
13	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16	<input type="checkbox"/> 17	<input type="checkbox"/> 18	19
20	<input type="checkbox"/> 21	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24	<input type="checkbox"/> 25	26
27	<input type="checkbox"/> 28	<input type="checkbox"/> 29	<input type="checkbox"/> 30	<input type="checkbox"/> 31		

Prev Next

## Select type of log

(Service Log, non-billable, student absent, etc.).

Non-billable Entries and Absent codes are only available for Individual Service entry.

Service Log is a default choice.

Click Continue

### Service Log by Student Wizard

BAILEY, MAGGIE M (1/1/2000)

What type of log would you like to enter?

- Service Log
- Non-Billable Entry
- Student absent
- Student not available
- Provider absent
- Provider not available

Return to Calendar

Continue >

#### Prior service logs

You have no prior service logs for this student for the given month.

Date is populated – Option to copy previous Service Log “Prefill from last servicelog” (all data except comments is captured).

1. Required fields display a red asterisk.
2. Business rule in place for minimum character requirement in comments section. Please enter brief description of encounter.
3. Upon saving, you arrive at the calendar where you can continue to enter service logs.

### Service Log by Student Wizard

**BAILEY, MAGGIE M (1/1/2000)**

Add a new service log Prefill from last service log

Service Date\*  Service Type\*  School

Service Times\* Start Time  :   AM  PM End Time  :   AM  PM

Progress Report \*  Location

Goals And Objectives

Comments\*

**Prior service logs**  
 You have no prior service logs for this student for the given month.

### Deleting a Service Log

Service Logs can be deleted if they haven't been billed

- 1) Locate Service Log on the calendar & select the log.
- 2) Click Next.
- 3) if there is a trash can before the Service Log, it can be deleted.



## Group and Multi-day Service Entry

### Service Log by Student Wizard

Select one or more students to enter service logs for...

#### Group Service Entry:

Select the group of children serviced.

Select All Select None

Aguilon, NICOLE : 5489632180  Badovinac, Lauren : 6541258759  BAILEY, MAGGIE : 4587533189  BAILEY, Troy : 6216785422  BAIRD, Andrew : 2135487952

Anderson, DOUGLAS : 334455689

Click Next

Next >

When selecting more than one child, just above the calendar a check box called GROUP SERVICE appears. If this is clicked all children selected from the previous screen will be included in the group service.

Check a day and Click Next

Wednesday

2

Group Service

If 3 children are checked then THREE logs will be created. Take a look at the Nicole Aguilon screen shot where it says "1 of 3". All of the required data fields populated will copy exactly to the next log after saving. NOTE: You will need to update the Goal and Comments for each new student.

#### Multi-Day Entry:

This may be used for individual or group services.

After selecting student/s check the desired days.

A screen similar to the one on the right will appear. All of the required data fields populated will copy exactly to the next log after saving.

NOTE: When recording group services the logs are ordered by DATE then by Student. In this way the provider record all services delivered on one day and once that daily group of services is complete it will move on to the next day.

Take your time: Look at the dates and names as they change.

Once a log is saved it can only be edited under edit service logs or deleted and then re-entered. There is NOT a back to previous log button.

### Service Log by Student Wizard

Aguillon, NICOLE (1/1/2000)

Add a new service log

Service Date\* 8/2/2017 Service Type\* 92526 Treatment of swallowing dysfunction and/or oral function for School Transylvania HS

Service Times\* Start Time 11:00 AM End Time 11:20 AM Progress Report \* Minimal Improvement Location 03-School

Goals And Objectives You can use goal numbers from the IEP or you can write the goal here.

Comments\* Provide a detailed and objective description of the intervention and student response to today's therapy/encounter.

1 of 3 33.33%

# Reports

## Logging Summary Report

**Access:** All therapists, nurses and mental health service providers . **Location:**

**Under Reports menu in Navigation Bar.** 

**Features:** Grid view of services delivered. Exportable to Excel and PDF.

### Logging Summary For Speech1 Speech1

[Export to PDF](#) [Export to XLS](#)

Month: **Dates of Service** **Start Date** **End Date** **Student selection**  
August 2017  8/1/2017 8/31/2017 [All]   
**Select Date range from pulldown or enter the date range, make the Student selection and then click 'Run Report'.**

Rows Returned: 4

Type	Service Date	Service	Service Type Desc	Duration	Group Size	Progress Report	Areas Covered	LC	Comments
Student Name DOB: Aguilon, NICOLE 2000-01-01									
Service Log	8/2/2017	Speech & Language w/ CCC	Treatment of swallowing dysfunction and/or oral function for	20		Minimal Improvement		03	Provide a detailed and objective description of the intervention and student response to today's therapy/encounter.
Student Name DOB: BAILEY, MAGGIE 2000-01-01									
Student Name DOB: BAILEY, Troy 2000-01-01									

## Detailed Student Report

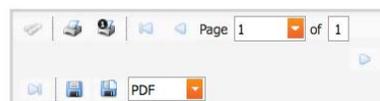
**Access:** All therapists, nurses and mental health service providers

**Location:** Under Reports menu in Navigation Bar 

**Features:**

1. **Date(s) of service search by monthly drop down or choose a date range.**
2. **TIP: Always click Run Report when parameters are changed.**
3. **Each student's services are ordered from most recent to oldest.**
4. **They are grouped by the kind of log. For example, all service logs are together or all days where it was recorded the student was absent are grouped together.**
5. **There is a page break between students.**

Month: **Dates of Service** **Start Date** **End Date** **Student selection**  
August 2017  8/1/2017 8/31/2017 [All]   
**Select Date range from pulldown or enter the date range, make the Student selection and then click 'Search'.**



6. **Once Run Report has been hit there is a navigation bar for the report that has the following functionality from left to right (hover cursor over the icons for instructions, too):**

- a. **Print report**
- b. **Print current page**
- c. **Scrolling through pages**
- d. **Save file to desktop.**
- e. **TIP: It may be faster to scroll through the report after it is saved as a PDF.**
- f. **Drop down to choose report format. We provide a variety of options, but PDF tends to work best.**

## Service Approval / Supervision Logs Wizards

The Supervision Log approval process has been updated to increase compliance and documentation. The updates also add functionality for the supervisors to more easily view previously supervised logs. Here is a quick summary of the changes.

**PART 1: Each service is approved.**

There is not a monthly choice.

Instead, the supervisor chooses a provider and student. On the next screen (on right) the supervisor can then choose one or more services to approve simultaneously.

Provider Name	Student Name	Birthdate	
COTA COTA	Ashleigh ADRIANSE	1/1/2000	<input type="button" value="Enter Supervision Log"/>
COTA COTA	Beth Allen	10/23/2012	<input type="button" value="Enter Supervision Log"/>
COTA COTA	George Adams	10/3/2012	<input type="button" value="Enter Supervision Log"/>
COTA COTA	MINDY Drouin	1/1/2000	<input type="button" value="Enter Supervision Log"/>
COTA COTA	NICOLE Aguillon	1/1/2000	<input type="button" value="Enter Supervision Log"/>
COTA COTA	TIFFANY Griffes	1/1/2000	<input type="button" value="Enter Supervision Log"/>

There can still be ONE comment entered that will be saved with all of the service logs checked on the screen.

**CLICK** one of the Save buttons at the bottom of the screen.

**Part 2: From Supervision Log Wizard Click: View Previously Entered Supervision Logs. CLICK Search** for all logs to appear or search by provider and/or student. View Previously Entered Supervision Logs

Add New Supervision Logs

Below you will find supervision logs that you have already completed. Please check the supervision logs you wish to delete then click (Delete Supervision Logs).

		Provider Last Name	Provider First Name	Student Last Name	Student First Name	Service Date							
		COTA					<input type="button" value="Search"/>						
<input type="checkbox"/>	Provider	Student	Service Type	Presenting Problem	Service Date	Start Time	End Time	Group Size	Progress Report	Service Comments	Supervision Comments	Areas Covered	Status
<input type="checkbox"/>	COTA, COTA	Aguillon, NICOLE	Sensory integrative techniques to enhance sensory processing	Physical Problem	1/5/2015	2:05 PM	2:45 PM		Maintained	Providing the detail of activity this encounter student response, interaction, etc	Services delivered by COTA COTA have been reviewed by OT and approved.		Pending
<input type="checkbox"/>	COTA, COTA	Drouin, MINDY	Sensory integrative techniques to enhance sensory processing	Physical Problem	12/19/2014	1:20 PM	1:50 PM		Maintained	Providing the detail of activity this encounter student response, interaction, etc	Services delivered by COTA COTA have been reviewed by OT and approved.		Pending
<input type="checkbox"/>	COTA, COTA	Adams, George	Therapeutic activities, direct (one-on-one) patient contact	Physical Problem	12/17/2014	8:40 AM	9:15 AM		Minimal Improvement	Providing the detail of activity this encounter student response, interaction, etc	Services delivered by COTA COTA have been reviewed by OT and approved.		Pending

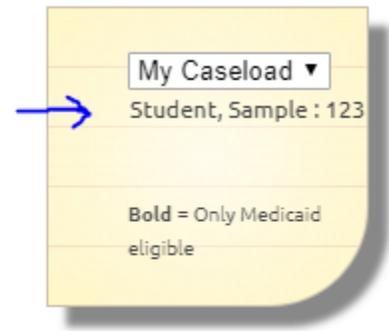
A supervisor can view previously entered supervision logs. The supervisor comment appears within the service log that has been approved. The supervisor can also delete one or more services that he or she may have mistakenly approved.

## Sharing Session Notes in the Service Portal

Supervising providers and their licensed assistants see previously entered logs **ONLY** when the student is shared on both provider's caseloads (i.e. OT and COTA, PT and PTA).

For example, if a Licensed Occupational Therapist and a Certified Occupational Therapy Assistant both provide services for the same student and this student is actively on both user's caseloads, then the Shared Service tab will populate with the logs entered by the other provider.

To access the feature, the user clicks on a student name from their caseload on the Portal's Home page.



This takes the user to the Student Information Page where they select **Shared Logs**. Please note: you may proceed to the logging calendar if/when ready from either the Shared Logs tab or Service Logs tab.

Student Information

Boise, Idaho [Go Back](#)

[Student](#) | [Special Education](#) | [Service Logs](#) | [Shared Logs](#) | [Monthly Summary](#) | [Supervision Logs](#)

[Go to Logging Calendar](#)

Provider	Service Type	Service Date	Start Time	End Time	Duration	Group Size	Progress Report	Comments	Areas Covered
test, test	(IEP) Speech Therapy Ind. Service	9/1/2016		12:20 AM	20		Not Applicable	#1 this is where i put my note for each session	Apraxia
test, test	(IEP) Speech Therapy Ind. Service	9/6/2016		12:20 AM	20		Not Applicable	#2 this is where i put my note for each session	Apraxia, Articulation skills and intelligibility
test, test	(IEP) Speech Therapy Ind. Service	9/7/2016		12:20 AM	20		Not Applicable	#3 this is where i put my note for each session	Apraxia, Articulation skills and intelligibility
test, test	(IEP) Speech Therapy Ind. Service	9/8/2016		12:20 AM	20		Not Applicable	#3 this is where i put my note for each session	Apraxia, Articulation skills and intelligibility

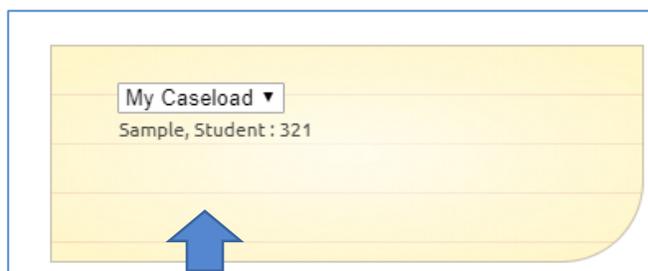
# Goals and Objectives

## OVERVIEW

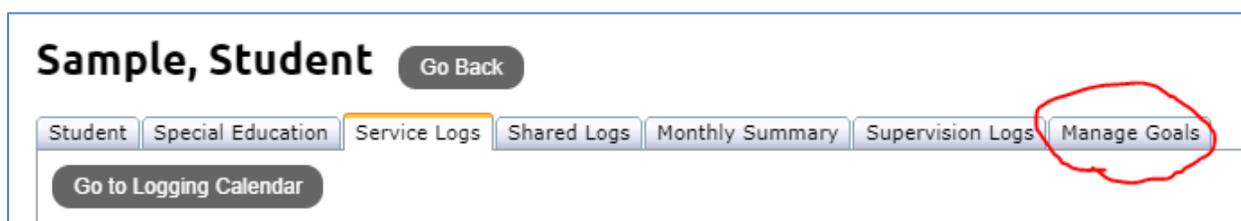
- Providers can manage goals and objective based upon a student’s IEP.
- Goal data is entered either manually or imported from IEP software program.
- The goals for a specific student shall appear in the service log for a user to select one or more goals for each log.

### Managing the Goal Bank:

On the Announcement Page in the My Caseload list, **click** on the **student** you would like to add goals to within the student’s goal bank.



**Click** on the **Manage Goals** tab.



Select **New** to add a Goal/Objective. The fields of Goal ID, IEP Start Date and IEP End Date are optional fields. When the goal is complete **click Update**. Repeat as needed.

- A listing of current goals in the bank will appear as choices in the service log.
- Please note, only the goals relevant to one’s specialty will appear. For example, Speech staff will only see the speech goals. These goals are also shared which allows all speech staff serving this child to see the same goals. If a speech person adds a new goal all of the speech staff shall see that goal for the student.

One may **Edit** or **Delete** a goal. Again, any changes here will impact the Goal Bank for providers with the same service type.

Please Note: *Deleting a goal does NOT delete the goal from the log, only from the Goal Bank.*

<b>New</b>	Related Service Code	Goal ID	Date Entered	IEP Start Date	IEP End Date	Goals and Objectives
<b>Edit Delete</b>		2.0	Oct 23 2018 7:33AM			80% proficiency with L sounds
<b>Edit Delete</b>		1.2	Oct 23 2018 7:32AM			80% proficiency with R sounds

## Adding Goals to Service Log:

Providers will now have two ways to enter Goals:

- Manual entry into the Goals and Objectives box or
- Use of the Goal Bank.

Select a Service Types to view Goals and Objectives. Note, evaluations will not require the use of Goals and Objectives.

Fill out the Service Time, Progress Report and then **Click Manage Goals and Objectives**.

The screenshot shows a form titled "Add a new service log" with a "Prefill from last service log" button. The form includes fields for "Service Date\*" (10/2/2018), "Service Type\*" (92507 TM GN (IEP) Speech Therapy Ind. Service), "Service Times\*" (Start Time 9:00 AM, End Time 9:30 AM), "Progress Report\*" (Not Applicable), and "Location" (03-School). A "Goals And Objectives" field with a question mark icon and a "Manage Goals and Objectives" button is circled in green.

A pop-up window will appear containing the Goal Bank.

- **Check** one or more goals you are working on.
- As you check the goals you will notice they are added to the Goal Text box.
- To Exit the Goal Window click the **"X"** in the top right corner.
- You may add text to the Goals and it will not impact the Goal Bank.
- All changes will be permanent in the log for reporting.
- *Any Goals Deleted from the Goal Bank will have zero impact on the log that is saved.*
- To check your log, go to Reports and then Detailed Student Report.

The screenshot shows a pop-up window titled "Manage G&O" with a close button (X) circled in green. The window displays a table with the following data:

#	Related Service Code	Goal ID	IEP Start Date	IEP End Date	Goals and Objectives
<input checked="" type="checkbox"/>		2.0			80% proficiency with L sounds
<input checked="" type="checkbox"/>		1.2			80% proficiency with R sounds

At the top of the window, the text "80% proficiency with L sounds, 80% proficiency with R sounds" is highlighted in yellow. Below the table, there are checkboxes for "Augmentative Communication", "Pragmatic/Social Language", and "Vocabulary Skills".

**Detailed Student Report of the Rendering Provider,  
tester, test for services received from 10/1/2018 to 10/31/2018**

Service Date	Service	Service Type	Procedure Code	Start Time	End Time	Dura- tion	Group Size	Loc Code	Progress Report
321	Sample, Student								
10/02/18	Licensed Speech Language Pathologist Service Log	(IEP) Speech Therapy Ind. Service	92507 TM GN	09:00	09:30	30	N/A	03	Not Applicable
<b>Comments:</b>		GOALS AND OBJECTIVES: 80% proficiency with L sounds, 80% proficiency with R sounds COMMENTS: Student is at 60% proficiency with R sounds while reading short story							
<b>Areas Covered:</b>		Articulation skills and intelligibility							Tue, 23 Oct 2018 08:30 CST
<b>Supervisor:</b>		N/A							

# Caseload Grouping Option

## Overview

Users may break up their student list into sub-groups in the Service Log by Student Wizard.

For example a user:

- sees students from multiple districts and they can create a district specific group;
- works at a high school and then a middle school and the user creates specific groups by school;
- creates groups based upon certain days of the week if desired.

*Users may choose to use or not use this functionality to log student services.*

## Instruction of use:

The user can create groups in two areas in the service portal.

The first option is on the home/ default page. Click *My Groups*.



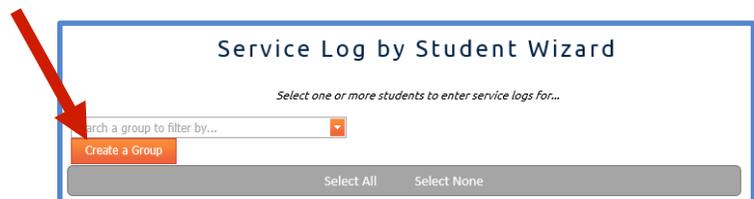
Or the second option would be to enter the wizards page.



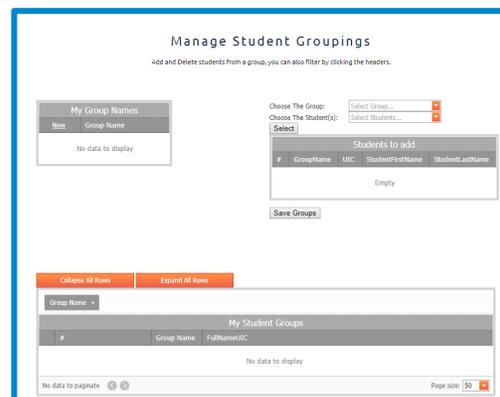
Click *Service Log By Student Wizard*



To start using the new feature click **CREATE a GROUP** button.



The Manage Student Groupings page will appear.



Under **My Group Names**, click *New*.

The screenshot shows a form titled "My Group Names" with a header bar containing "New" and "Group Name". Below the header is a text input field labeled "Group Name:" and two buttons: "Update" and "Cancel". A red arrow points to the "New" button in the header.

Type in the group name in the **Group Name** text field. Click *Update*.

To edit the group name, click *Edit*. Fix the group name or click *Delete* to erase completely.

The screenshot shows the "My Group Names" form with a table of groups. The table has columns for "New", "Group Name", "Edit", and "Delete". The groups listed are "Monday", "Middle school", and "Afternoon Kiddos". A red arrow points to the "Update" button for the "Monday" group, another red arrow points to the "Edit" button for the "Middle school" group, and a third red arrow points to the "Delete" button for the "Middle school" group.

After the group name is created, **Choose the Group** you would like to add students to and then click *Close*.

The screenshot shows a dialog box titled "Choose The Student(s)". It has a "Choose The Group:" dropdown menu set to "Monday" and a "Choose The Student(s):" dropdown menu. Below these is a "Select" button and a table with columns "#", "GroupName", "UIC", and "StudentLastName". A red arrow points to the "Close" button at the bottom right of the dialog.

Choose the students by clicking a checkmark to the left of the student full name. After selecting multiple students, click *Close*.

The screenshot shows the "Choose The Student(s)" dialog box with the "Choose The Group:" dropdown set to "Monday". The "Choose The Student(s):" dropdown is open, showing a list of students with checkboxes. A red arrow points to the "Close" button at the bottom right of the dialog. A text box above the student list says "Choose students to add into your selected group".

	Full Name UIC	First Name	Last Name	UIC
<input type="checkbox"/>	tester, tesr UIC: temp778889	tesr	tester	temp778889
<input type="checkbox"/>	tester, tester UIC: 1234567891	tester	tester	1234567891

Click the *Select* button to preview the names chosen for the group. If you like what you see, click, *Save Group*. If you would like to make a change, re-select the group and kiddos. Then *Select* and *Save Group*.

Choose The Group:

Choose The Student(s):

Students to add				
#	GroupName	UIC	StudentFirstName	StudentLastName
<input type="button" value="Delete"/>	WED	temp778889	tesr	tester
<input type="button" value="Delete"/>	WED	1234567891	tester	tester

The group(s) will display on the bottom in **My Student Group** grid view.

1) **Collapse All Rows:** This will shrink all the rows in the Grid view

2) **Expand All Rows:** This will Expand all the rows inside the Grid view

Group Name ▾

**My Student Groups**

#	Group Name	FullNameUIC
<input type="button" value="Expand"/>	Group Name: Monday	
<input type="button" value="Expand"/>	Group Name: Tuesday	

Page 1 of 1 (2 items)

Page size:

Once you have made the initial Group names, you will select the groups for logging from the Student Wizard page.



Go to the Service Log By Student Wizard page, from the dropdown “search a group to filter by” select the group and your list of students will populate.

### Service Log by Student Wizard

Select one or more students to enter service logs for...

search a group to filter by...

- Morning Class
- Mid Afternoon class
- Afternoon Class
- Elementary

Select All    Select None

- Test,Test1 000000001
- Test,Test2 000000002
- Test,Test3 000000003

To go back to the ALL Caseload that you originally have, after selecting a group, just click the X or Wizards from the toolbar.

test