

Questions? Please email Lisa Waterman at lwaterman@mt-schools.org

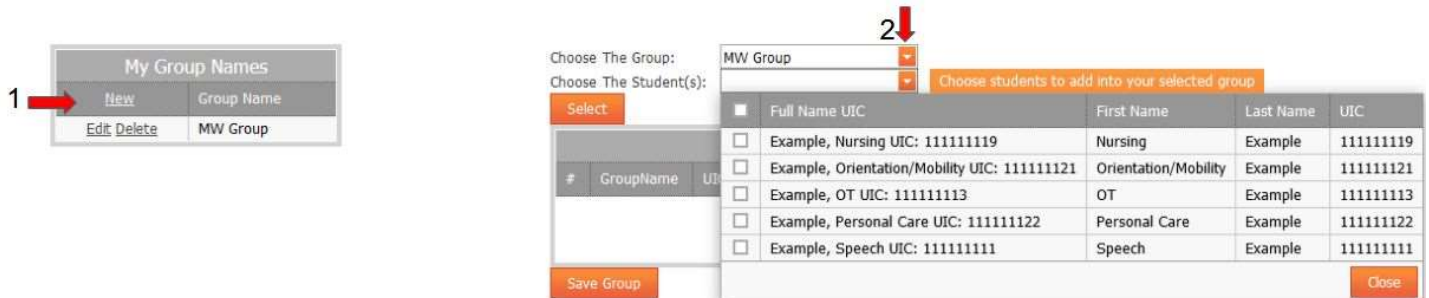
Directions for Creating Groups in the Service Portal:

From the Homescreen:

- ❖ Select *My Groups* found above your Caseload list
- ❖ You are brought to the Group Creation screen
- ❖ First you need to create the group by selecting *Edit* under *My Group Names* on the left
- ❖ Next you will choose the newly named group on the right side
- ❖ Choose students for your group by checking the box next to their name
- ❖ Select *Save Group*
- ❖ You will now be able to select the group from the student section screen of the Logging Wizard

Manage Student Groupings

Add and Delete students from a group, you can also filter by clicking the headers.



1

My Group Names				
	New	Group Name		
	Edit Delete	MW Group		

2

Choose The Group: MW Group

Choose The Student(s):

Choose students to add into your selected group

	Full Name UIC	First Name	Last Name	UIC
<input type="checkbox"/>	Example, Nursing UIC: 111111119	Nursing	Example	111111119
<input type="checkbox"/>	Example, Orientation/Mobility UIC: 111111121	Orientation/Mobility	Example	111111121
<input type="checkbox"/>	Example, OT UIC: 111111113	OT	Example	111111113
<input type="checkbox"/>	Example, Personal Care UIC: 111111122	Personal Care	Example	111111122
<input type="checkbox"/>	Example, Speech UIC: 111111111	Speech	Example	111111111

Save Group Close



Collapse All Rows Expand All Rows

Group Name

My Student Groups

#	Group Name	FullNameUIC
Group Name: MW Group		
Delete	MW Group	Example Orientation/Mobility: 111111121
Delete	MW Group	Example OT: 111111113
Delete	MW Group	Example Speech: 111111111
Delete	MW Group	Example Personal Care: 111111122

Log Group Services

- ❖ Using the Wizard, create a new Service Log
- ❖ Choose the name of the group you just created in the upper left corner
- ❖ The students in the group will automatically be selected
- ❖ Click 'Next' to go to the Calendar
- ❖ Choose the date of the service
- ❖ Check the box next to *Group Service* above the calendar
- ❖ Select Next at the bottom of the calendar to go to the logging screen

*** ***It is important to select Group Service at the top of the calendar*** ***

Service Log by Student Wizard

Example, Orientation/Mobility (1/1/2010)

Group Service

Sunday	Monday	Tuesday	Wednesday	Thursday
		<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10
13	<input checked="" type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16	<input type="checkbox"/> 17
20	<input type="checkbox"/> 21	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24
27	<input type="checkbox"/> 28	<input type="checkbox"/> 29	<input type="checkbox"/> 30	<input type="checkbox"/> 31

Enter the Specifics

- ❖ Service Date is populated according to your calendar choice, but can be changed
- ❖ Required fields display a red asterisk
- ❖ Goals and Objectives can be filled for each student
- ❖ Make notes in the Comments section related to the student listed at the top of the screen.
- ❖ Save the Service Log to move to the next student in the group
- ❖ Service type, start time, duration, and comments will all carry forward to the next student in the group list.

Add a new service log

Service Date* 10/14/2019 **Service Type*** 92507 Treatment of speech, language, voice, communication - Ind

School
 Example School

Start Time 10:00 AM PM **Location** 03-School

Duration H:MM :30

Goals And Objectives

Goals and Objectives can be saved for each student from the home screen. You can also copy and paste goals and objectives directly from the AIM system.

Comments*
 Comments will carry forward for each student with the ability to add or remove so that each student log is unique.

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