Supervisor: How to approve Service Records for Limited Licensed Staff in PSSP

1. Log in to PSSP On the Homepage, far right, select the Attending School from **Your Current Location** dropdown. **Note:** If you work at only one location, go to Step 2**.** Alternatively, you can select the location while in the report (Step 2) by clicking the **Organizational Location Filter** dropdown.	

2. From the Homepage, **click**:
  ▪ Reporting
  ▪ Standard Reports
  ▪ Supervisory Approval
  ▪ [WISD] My Summary Report: Records Needing Approval
 	
(All Service Records needing approval will pop up.)
 	
Click **Service Date Time**. For Filter dropdown, select Filter: >= (greater/equals)
Then type in the date you want to start approving Service Records and click Okay.	

3. Review the Service Records.

Options for approving Service Records Include:

OPTION A: *Individually*
Click the Profile icon to the left of ID

Then click **Edit**

If everything looks good, check the box titled: ***This service was supervised and is approved for billing***

Click **Accept Changes**

Navigate back to **Report**
(upper left) to go to the next Record.

[WISD] My Summary Report (Records Needing Approval)

ID	Student	Staff	Service Date Time	Service	Session Size	Service Type Code	Service Type	Progress Report	Areas Covered	Provider Notes
12751			11/07/2016, 02:30 PM	320	1	96101	Psychological Testing – IEP/IFSP related [96101]	Not Applicable	Testing/Evaluation	Initial comprehensive evaluation. Cognitive, academic testing. IEP development. Eligibility is SLD.

Service Form ↘ | Edit ＋ Add Service Record 🖶 Print

Service Record

	Areas Covered/Assessed:
Counseling ▾	(If Other Specify):
(none) ▾	(If Other Specify):
(none) ▾	(If Other Specify):

Has this service been completed? ☑

This service was supervised and is approved for billing ☐

Void Service ☐

* Be sure to enter these key fields.

Accept Changes | **Cancel Editing**

← Report | Josephine AAASample (1) > Service Records | **Service Record**

OPTION B: *Mass Approve*

Click the **More…** dropdown arrow.

Select Apply Bulk Operation

Check off all of the individual Service Records you wish to approve.

For **Apply Bulk Operation** dropdown, click **Set Admin Complete**

Then click the tab titled: **Apply to Service Records Checked Below**

Supervisory Approval > [WISD] My Summary Report: Records Needing Approval

Organizational Location Filter: ⌄ (None)

| Subscribe | Refresh | Download ⌄ | Print | More… ⌄ |

- Send Message with Report
- Bulk-Print Setup
- Bulk-Print Selected Profile Forms
- Apply Bulk Operation ←
- View Audit Log

[WISD] My Summary Report (Records Need

ID	Student	Staff	Service Date Tim

☐	ID	Last Name	First Name
☑	1	AAASample	Josephine

Apply Bulk Operation [Set Admin Complete ⌄]

[Apply to Service Records Checked Below]

[Apply to All Service Records in Report]

OPTION C: *Mass Approve All*

Click the **More…** dropdown arrow.

Select Apply Bulk Operation

For **Apply Bulk Operation** dropdown, click **Set Admin Complete**

Then click the tab titled: **Apply to All Service Records in Report**

Supervisory Approval > [WISD] My Summary Report: Records Needing Approval

Organizational Location Filter: ⌄ (None)

| Subscribe | Refresh | Download ⌄ | Print | More… ⌄ |

- Send Message with Report
- Bulk-Print Setup
- Bulk-Print Selected Profile Forms
- Apply Bulk Operation ←
- View Audit Log

[WISD] My Summary Report (Records Need

ID	Student	Staff	Service Date Tim

Apply Bulk Operation [Set Admin Complete ⌄]

[Apply to Service Records Checked Below]

[Apply to All Service Records in Report]