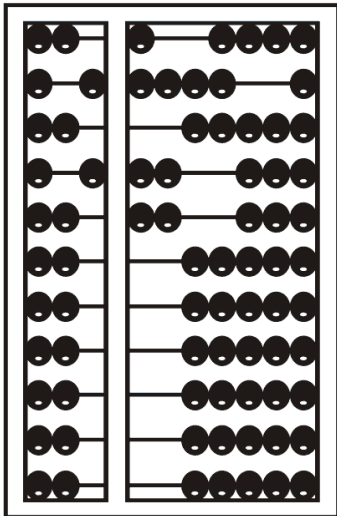


JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants



# CPSE Portal Agency Case Management

# Topics Covered

- \* **Looking Up Children**

- \* Child Lookup

- \* **Unmatched Children and Enrollments**

- \* Creating/Editing an Unmatched Child
- \* Adding/Editing an Unmatched Enrollments
- \* Adding an Unmatched Enrollment for CBRS

- \* **Assigning Therapists to Children**

- \* Assigning Enrollments to Therapist
- \* Assigning Therapist to Children

- \* **Matching Children and Enrollments**

- \* Matching Children
- \* View Unmatched Enrollments
- \* Matching Enrollments

- \* **Reports**

- \* Enrollment Lookup Report
- \* Enrollment Assignments Report
- \* How to Find an ESID #

- \* **Closing**

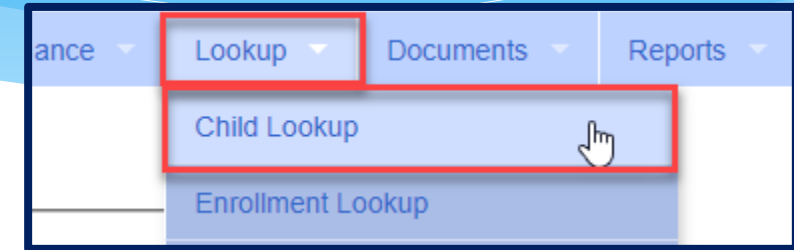
- \* Knowledge Base Links
- \* Upcoming Webinars
- \* Closing Remarks



# Looking Up Children

# Child Lookup

- \* Go to **Lookup** -> **Child Lookup**.
- \* Enter the start of the child's last name and click Search.
- \* Find the child and click Details.
- \* Wildcard searches can be done by using “%” ex. Search “%son” returns Wilson, Sampson, Thompson, etc.



**Child Lookup**

Last Name   [ Show Advanced Search options ]

Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	
SCHAFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	<a href="#">Details</a>
SCHAFER	LATRICIA	5/12/2011	F35053	Iroquois	ERIE	County Record	<a href="#">Details</a>
SCHMITT	FREDDIE	3/1/2012	G04529	Orchard Park	ERIE	County Record	<a href="#">Details</a>
SCHULZ	FREDERIC	3/3/2011		Buffalo	ERIE	County Record	<a href="#">Details</a>
SCHULZ	JONNIE	12/5/2009	E34929	Orchard Park	ERIE	County Record	<a href="#">Details</a>
SCHUSTER	JACQUELINE	1/28/2011	F67096	Buffalo	ERIE	County Record	<a href="#">Details</a>
SCHUSTER	MARGARITE	3/30/2012	F67281	Buffalo	ERIE	County Record	<a href="#">Details</a>

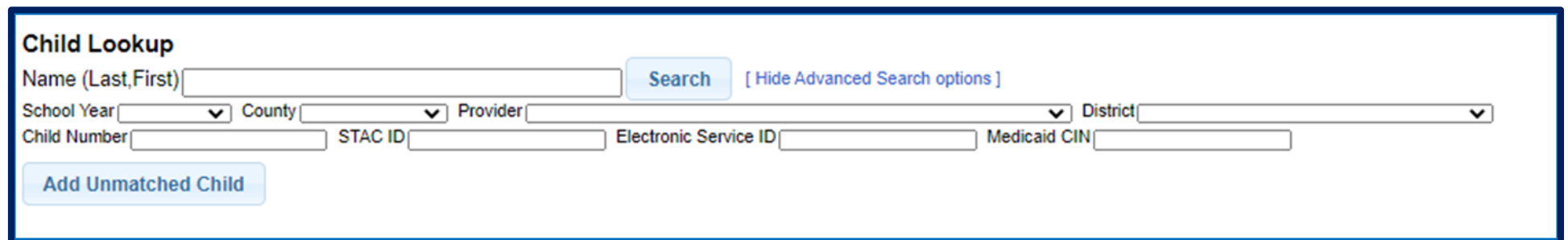
# Child Lookup Advanced Search

- \* Click “Show Advanced Search options” to see additional search criteria:



**Child Lookup**  
Name (Last,First)   [\[ Hide Advanced Search options \]](#)

- \* School Year
- \* County
- \* Provider
- \* District
- \* STAC ID #
- \* Electronic Service ID #



**Child Lookup**  
Name (Last,First)   [\[ Hide Advanced Search options \]](#)  
School Year  County  Provider  District   
Child Number  STAC ID  Electronic Service ID  Medicaid CIN



# Unmatched Children and Unmatched Enrollments

# Unmatched Children & Enrollments

- \* Typically, all information about a child and the services they are receiving are entered by the County and uploaded into CPSE Portal.
  - \* However, an agency can create a temporary child and temporary enrollment records.
  - \* These are created when the County is delayed in entering data.
  - \* The agency can create these records so that attendance and other information can be recorded even though the County has not entered the official information.
- \* Once the County uploads the official information, the agency can “match” the temporary records to the County created record. When matching the records, any data entered for the temporary record is moved over to the County created record and then the temporary one is deleted.
- \* In CPSE Portal, these temporary / placeholder entries are referred to as “UnMatched”.
- \* Unmatched children do not have an ESID #.

# Creating an Unmatched Child

- \* Go to **Caseload Maintenance -> Unmatched Children** and click “Add Child”
- \* Fill in the “Add Child” screen and click “Add” (address & phone # are optional)

The screenshot shows a web form titled "Add Child" with a close button (X) in the top right corner. The form contains the following fields:

- Provider: A dropdown menu.
- County: A dropdown menu.
- District: A dropdown menu.
- Last Name: A text input field.
- First Name: A text input field.
- MI: A small text input field.
- DOB: A text input field.
- Gender: A dropdown menu.
- Address 1: A text input field.
- Address 2: A text input field.
- City: A text input field.
- State: A dropdown menu with "New York" selected.
- Zip: A text input field.
- Home Phone: A text input field.
- SEDSTACID: A text input field.

A red rectangular box highlights the County, District, Last Name, First Name, MI, DOB, and Gender fields. A red circular box highlights the "Add" button at the bottom left of the form.



# Editing an Unmatched Child

Home File Transfer ▾ Activities ▾ eSTACs ▾ Attendance ▾ Billing ▾ Caseload Maintenance ▾ Lookup ▾ Documents ▾ Reports ▾ Medicaid ▾ People ▾

**Unmatched Children** [Add Child](#)

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
C62000210698		Nolan		12/7/2018		KINGSTON CITY SD						Enrollments	Attempt Match	<a href="#">Edit</a>	<a href="#">Delete</a>

- \* Go to **Caseload Maintenance** -> **Unmatched Children**
- \* You can Edit:
  - \* Child's Name
  - \* Date of Birth
  - \* District
- \* Click "Update" to save your changes.

**Unmatched Children** [Add Child](#)

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
C62000210698		Nolan		12/7/2018		KINGSTON CITY SD ▾						Enrollments	Attempt Match	<a href="#">Update</a>	<a href="#">Cancel</a>

# Adding an Unmatched Enrollment

- \* You can add an Unmatched Enrollment to either a County created child or an Unmatched Child (created by the provider).
- \* For an Unmatched Child:
  - \* You can use the **Unmatched Children** page or
  - \* You can go to the **Add/Edit Unmatched Enrollments** page.
- \* For a County-created child, you can only use the **Add/Edit Unmatched Enrollments** page.



# Adding an Unmatched Enrollment (Related Service & SEIT)

- \* Go to **Caseload Maintenance -> Add/Edit Unmatched Enrollments**

- \* Search child's name, and click "Select"

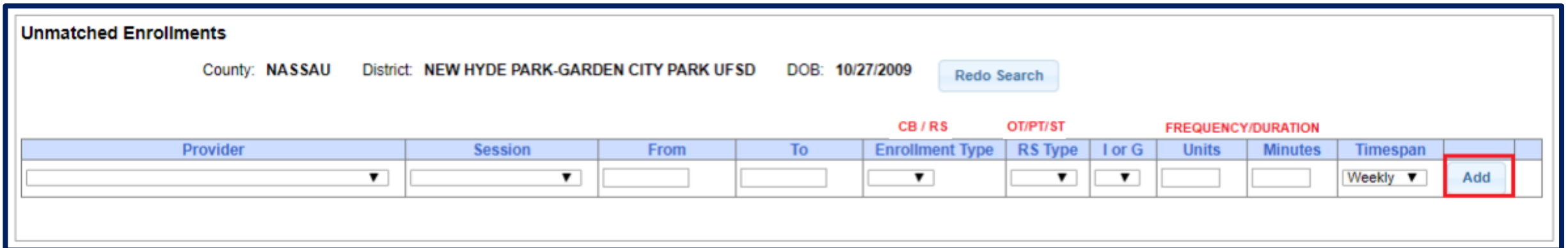


Unmatched Enrollments

Name (Last,First)   [ Show Advanced Search options ]

- \* Fill in all of the pertinent information in the table:

- \* Provider, Session, From/To Dates, Enrollment Type, RS Type, I or G, Units, Minutes, Timespan)
- \* Click "Add"



Unmatched Enrollments

County: NASSAU District: NEW HYDE PARK-GARDEN CITY PARK UFSD DOB: 10/27/2009

Provider	Session	From	To	CB / RS Enrollment Type	OT/PT/ST RS Type	I or G	FREQUENCY/DURATION Units	Minutes	Timespan	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Weekly <input type="text"/>	<input type="button" value="Add"/>


# Adding Unmatched Enrollments from the Unmatched Children Screen

- \* You can also add an enrollment by choosing the “Enrollments” button on your unmatched child (RS or SEIT).

Home File Transfer ▾ Activities ▾ eSTACs ▾ Attendance ▾ Billing ▾ Caseload Maintenance ▾ Lookup ▾ Documents ▾ Reports ▾ Medicaid ▾ People ▾

**Unmatched Children** [Add Child](#)

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
C62000210698		Nolan		12/7/2018		KINGSTON CITY SD						Enrollments	Attempt Match	Edit	Delete



- \* Enter all data on the blank row and click “Add”

**Unmatched Enrollments**

County: NASSAU District: NEW HYDE PARK-GARDEN CITY PARK UFSD DOB: 10/27/2009 [Redo Search](#)

Provider	Session	From	To	CB / RS Enrollment Type	OT/PT/ST RS Type	I or G	FREQUENCY/DURATION Units	Minutes	Timespan	
									Weekly ▾	<a href="#">Add</a>

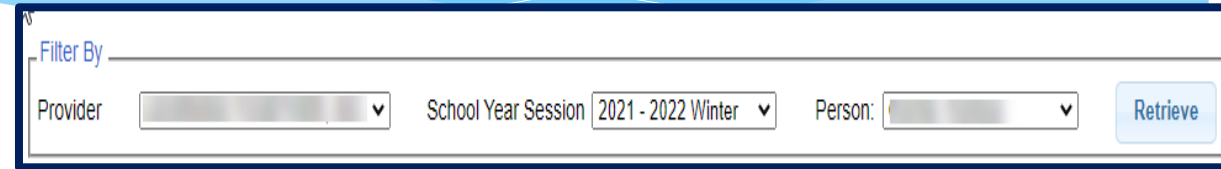


# Assigning Therapist to Children

# Assigning Enrollments to Therapist

- \* Go to **Caseload Maintenance -> Caseload**

- \* Select therapist under “Person” dropdown and click “Retrieve”. This will bring up the therapist’s caseload.



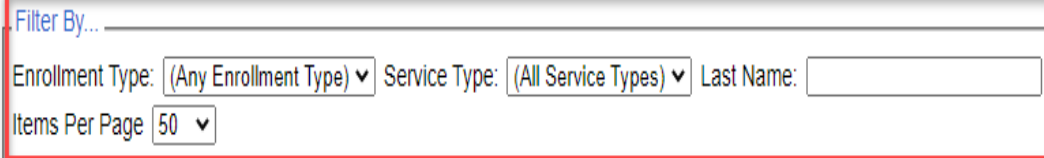
A screenshot of a web interface for filtering caseloads. It features a 'Filter By' section with three dropdown menus: 'Provider' (with a blurred selection), 'School Year Session' (set to '2021 - 2022 Winter'), and 'Person' (with a blurred selection). A 'Retrieve' button is located to the right of these filters.

- \* Click “Add New Assignment”.

Add New Assignment

- \* Filter by Enrollment Type, Service Type, or Last Name and click “Retrieve” to bring up any enrollments that fit the filter description.

Assign Cases To Carissa [blurred] for the 202122 WIN session



A screenshot of a web interface for assigning cases to a specific therapist. It includes a 'Filter By...' section with three dropdown menus: 'Enrollment Type' (set to '(Any Enrollment Type)'), 'Service Type' (set to '(All Service Types)'), and 'Last Name' (empty). Below these is an 'Items Per Page' dropdown set to '50'. A 'Retrieve' button is located to the right of the filters.

Retrieve

Assign Selected to Carissa [blurred]

Return to Caseload

# Assigning Enrollments to Therapist

- \* Select the enrollments that you want to assign to this therapist, and click “Assign Selected To [Therapist’s Name]”.
- \* Click “Return to Caseload” to return to the previous therapist search page.

Filter By...

Enrollment Type: (Any Enrollment Type) Service Type: ST Last Name:

Items Per Page 50

Assign Selected to BRANDON KELLY Return to Caseload

	Status	Last Name	First Name	ESID	From	To	Enrollment Type	RS Type	Freq	I/G	Provider	County	District	
<input type="checkbox"/>	UNMATCHED	ALDRICH	PORFIRIO		9/9/2019	6/26/2020	RS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALI	ADOLFO	CBRS1920W0000468	9/9/2019	10/14/2019	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALI	ADOLFO	CBRS1920W0000473	10/15/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input type="checkbox"/>		ALLEN	ADOLPH	CBRS1920W0000355	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALLISON	ADRIAN	CBRS1920W0000382	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Beacon	Attendance
<input type="checkbox"/>		ALLRED	KORY	CBRS1920W0000447	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALVARADO	AGUSTIN	CBRS1920W0000257	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Beacon	Attendance
<input checked="" type="checkbox"/>		AMBROSE	FREDRIC	CBRS1920W0000200	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Poughkeepsie	Attendance
<input type="checkbox"/>		ANAYA	DINO	CBRS1920W0000176	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Beacon	Attendance
<input type="checkbox"/>		ANDERSON	AL	CBRS1920W0000161	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Arlington	Attendance
<input checked="" type="checkbox"/>		ANDRADE	ALAN	CBRS1920W0000571	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Poughkeepsie	Attendance
<input type="checkbox"/>		ANDREWS	WANDA	CBRS1920W0000561	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input type="checkbox"/>		ANTHONY	ALBERTO	CBRS1920W0000391	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Arlington	Attendance
<input checked="" type="checkbox"/>		ARCHER	ALDEN	CBRS1920W0000128	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Arlington	Attendance
<input type="checkbox"/>		ARIAS	EARNESTINE	RS1920W0023296	10/7/2019	6/26/2020	RS	ST	2.00x 30 WEEKLY	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Poughkeepsie	Attendance

# Assigning Children to Therapist

- \* Go to **Caseload Maintenance -> Assign Child's Therapist(s) and Service Provider(s)**.
- \* Search for child, and then click "Select".

**Select a Child**

Name (Last,First)   [ Show Advanced Search options ]

	Child Number	Last Name	First Name	DOB	CIN	District	County
<input type="button" value="Select"/>	62000182949			2/14/2018		KINGSTON CITY SD	ULSTER

- \* This will bring up all of the enrollments for the child.
- \* Now "Select" the enrollment.

**Select a Child**

ALV/  County: **ULSTER** District: **KINGSTON CITY SD** DOB:

**Select an Enrollment**

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
<input type="button" value="Select"/>	CB2122W0009636	CB		5 hrs/day	1/3/2022	6/24/2022		
<input type="button" value="Select"/>	CB2122W0009637	CB		5 hrs/day	1/3/2022	6/24/2022		
<input type="button" value="Select"/>	CB2122W0009637	CB		5 hrs/day	1/3/2022	6/24/2022		
<input type="button" value="Select"/>	CBRS2122W0036065	CBRS	PSY	1x30	1/3/2022	6/24/2022	I	
<input type="button" value="Select"/>	CBRS2122W0036073	CBRS	OT1	1x30	1/31/2022	6/24/2022	G	
<input type="button" value="Select"/>	CBRS2122W0036101	CBRS	OT	1x30	1/31/2022	6/24/2022	I	



# Assigning Children to Therapist


- \* Select a therapist from the Available Therapists section, and click “Add Therapist(s)/Service Provider(s)”.
- \* To remove assigned therapists, select the therapist from the Assigned Therapists section, and click “Remove Therapist”.

Select	CBRS2122S0035244	CBRS	OT	2x30	7/5/2021	8/13/2021	I	
Select	CBRS2122S0035245	CBRS	PSY	1x30	7/5/2021	8/13/2021	I	
Select	CBRS2122S0035245	CBRS	PSY	1x30	7/5/2021	8/13/2021	I	

**Assigned Therapists**


	Last Name	First Name	NPI
<input type="checkbox"/>		Jessica	



Remove Therapist

**Available Therapists**

	Last Name	First Name	NPI
<input type="checkbox"/>		Davis	
<input type="checkbox"/>		Christine	
<input type="checkbox"/>		Christina	
<input type="checkbox"/>		Destiny	
<input type="checkbox"/>		Madison	
<input type="checkbox"/>		Carissa	
<input type="checkbox"/>		Susana	
<input type="checkbox"/>		Celeste	
<input type="checkbox"/>		Kristen	
<input type="checkbox"/>		Heather	
<input type="checkbox"/>		Caleigh	
<input type="checkbox"/>		Jessica	
<input type="checkbox"/>		Mara	
<input type="checkbox"/>		Sarah	
<input type="checkbox"/>		Sarah	



Add Therapist(s)/Service Provider(s)



# Matching Children and Enrollments

# Matching Children

- \* Billing **cannot** be submitted to the County on “Unmatched” children/enrollments.
- \* Billing can only be submitted for County created enrollments.
- \* You will need to match the Unmatched Children and Unmatched Enrollments.
- \* You can go to **Caseload Maintenance -> Unmatched Children** and “Attempt Match”.

Home File Transfer Activities eSTACs Attendance Billing **Caseload Maintenance** Lookup Documents Reports Medicaid People

**Unmatched Children** [Add Child](#)

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
C62000210698		Nolan		12/7/2018		KINGSTON CITY SD						Enrollments	Attempt Match	Edit	Delete

- \* Or you can “Attempt Child Match” from the **Caseload Maintenance -> View Unmatched Enrollments** screen.

**Unmatched Enrollments**  
School Year [All School Years](#) [Retrieve](#)

County	Child Number	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description				
	C62000212737			12/12/18	202122	04/01/22	06/23/22	CB		0 hrs/day 0 days/week	Attendances	Attempt Child Match		Delete

# Matching Children

- \* The top of the screen will show the information you entered for the child.
- \* The bottom of the screen shows the potential matches.
- \* **Make sure the child you are selecting to match is the correct one** and click “Select”.

### Match Child Against County-Imported Child

**Current Unmatched Child:**  

, Dannielle

 County:  District: **NEW PALTZ CSD** DOB: **12/12/2018**

**Potential Matches:**

Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	<div></div>	ANNELIESE		12/12/2018	<div></div>	NEW PALTZ CSD	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Select	<div></div>	DANNIELLE		12/12/2018	<div></div>	NEW PALTZ CSD	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

# Matching Children

- \* The bottom of the screen will ask you to confirm the information.
- \* **Double check** the information for accuracy, and if it is correct, click “Match!”

**Match Child Against County-Imported Child**

**Current Unmatched Child:**  
Dannielle County: District: NEW PALTZ CSD DOB: 12/12/2018

**Potential Matches:**  
Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select		ANNELIESE		12/12/2018		NEW PALTZ CSD					
Select		DANNIELLE		12/12/2018		NEW PALTZ CSD					

**WARNING:** By clicking the button below, you are combining these two children (including any associated data - not limited to: enrollments, attendances, medicaid consents, medicaid eligibility, IEPs, log notes, scripts/orders). Make sure the match is correct. This cannot be undone.

Dannielle (12/12/2018) → DANNIELLE (12/12/2018)

**Match!**

# View Unmatched Enrollments

- \* Go to **Caseload Maintenance** → **View Unmatched Enrollments**.

**Unmatched Enrollments**

Retrieve

County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description			
ERIE	BLUM	MERIL	03/24/12	201516	04/06/16	06/30/16	RS	PT	1x30	Attendances	Attempt Child Match	Delete
ERIE	GARY	KELLY	01/30/11	201516	04/20/16	06/30/16	RS	OT	1x30	Attendances		Delete
ERIE	GERBER	MEGAN	02/17/12	201516	03/30/16	06/30/16	RS	ST	3x30	Attendances	Attempt Enrollment Match	Delete
ERIE	HOANG	JULES	03/24/11	201516	04/07/16	06/30/16	RS	ST	2x30	Attendances	Attempt Enrollment Match	Delete
ERIE	LACKEY	ISIAH	06/27/12	201516	03/30/16	06/30/16	RS	ST	3x30	Attendances	Attempt Enrollment Match	Delete



- \* If the enrollment has potential matches (same child and service type), the “Attempt Enrollment Match” link will appear.

# Matching Enrollments to County Created Enrollments

- \* The top of the screen shows the agency created unmatched enrollment.
- \* The bottom of the screen shows a list of potential matches based on service type only (doesn't check dates).
- \* If you find a County created match, click “Select”.

## Match Enrollment Against County-Imported Enrollment

Child:

[Redacted]

County: **SCHENECTADY**

District: **Scotia**

DOB: **4/5/2019**

### Current Unmatched Enrollment:

Session: **2022 - 2023 Winter** From Date: **12/13/2022** To Date: **6/22/2023**

Enrollment Type: **CBRS** Service Type: **OT** Individual or Group: **I** Frequency: **2x30**

### Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	CBRS	OT	2022 - 2023 Winter	12/13/2022	6/22/2023	I	2x30	[Redacted]

# Matching Enrollments to County Created Enrollments

- \* When you “Select” the enrollment to match, you will be prompted to confirm the information.
- \* **Double check** to make sure the information is correct.
- \* If it is correct, click “Match!”

## Match Enrollment Against County-Imported Enrollment

Child:  County: **SCHENECTADY** District: **BURNT HILLS-BALLSTON LAKE CSD** DOB: 11/3/2018

### Current Unmatched Enrollment:

Session: **2022 - 2023 Winter** From Date: **1/5/2023** To Date: **6/22/2023**  
Enrollment Type: **CBRS** Service Type: **OT** Individual or Group: **I** Frequency: **2x30**

### Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	CBRS	OT	2022 - 2023 Winter	1/5/2023	6/22/2023	I	2x30	<input type="text"/>

**WARNING:** By clicking the button below, you are combining these two enrollments (including any associated data - not limited to: attendances, orders/scripts, log notes, therapist/provider assignments). Make sure the match is correct. This cannot be undone.

UNMATCHED ENROLLMENT  
(1/5/2023 - 6/22/2023)  
2x30 → CBRS2223W0025240  
(1/5/2023 - 6/22/2023)  
2x30

Match!





# Reports

# Enrollment Lookup Report

- \* A report of all enrollments.
- \* Go to **Lookup -> Enrollment Lookup**

Enrollments

School Year Session2021 - 2022 Summer▼County▼☒ CBRS☒ RS☒ SEIT☒ CB

Provider▼

Search

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	CB2122S0022336			2/16/2016				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		<a href="#">Attendances</a>
	CBRS2122S0020430			2/16/2016				CBRS	ST	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		<a href="#">Attendances</a>
UnMatched				4/11/2017				RS	PT	7/12/2021	8/20/2021	2x30	I			0.00	0.00	6	6		<a href="#">Attendances</a>
UnMatched				4/11/2017				RS	ST	7/12/2021	8/20/2021	1x30	I			0.00	0.00	6	6		<a href="#">Attendances</a>
	CB2122S0021911			4/11/2017				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		<a href="#">Attendances</a>
	CBRS2122S0020788			4/11/2017				CBRS	ST	7/12/2021	8/20/2021	1x30	I	9100-A		0.00	3.00	6	6		<a href="#">Attendances</a>
	CBRS2122S0020789			4/11/2017				CBRS	PT	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		<a href="#">Attendances</a>
	CBRS2122S0020790			4/11/2017				CBRS	HLT	7/12/2021	8/20/2021	5x15	I	9100-A		0.00	0.00	6	6		<a href="#">Attendances</a>

# Enrollment Lookup Report

- \* Use this report to find:
  - \* Attendances on an enrollment
  - \* Why an unmatched enrollment is not matching the county's enrollment
  - \* Why an enrollment isn't showing up for billing (missing rates)
  - \* Report can be exported to Excel

## Enrollments

School Year Session  County

Provider

☒ CBRS

☒ RS

☒ SEIT

☒ CB

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	CB2122S0022336			2/16/2016				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		Attendances
	CBRS2122S0020430			2/16/2016				CBRS	ST	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		Attendances
UnMatched				4/11/2017				RS	PT	7/12/2021	8/20/2021	2x30	I			0.00	0.00	6	6		Attendances
UnMatched				4/11/2017				RS	ST	7/12/2021	8/20/2021	1x30	I			0.00	0.00	6	6		Attendances
	CB2122S0021911			4/11/2017				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		Attendances
	CBRS2122S0020788			4/11/2017				CBRS	ST	7/12/2021	8/20/2021	1x30	I	9100-A		0.00	3.00	6	6		Attendances
	CBRS2122S0020789			4/11/2017				CBRS	PT	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		Attendances
	CBRS2122S0020790	ALI		4/11/2017				CBRS	HLT	7/12/2021	8/20/2021	5x15	I	9100-A		0.00	0.00	6	6		Attendances

# Enrollments Added by County Report

- \* Go to **Reports -> Enrollments Uploaded By County**
- \* Report will give you a listing of enrollments that the county has added to the Portal.
  - \* You can filter by dates added after/before, by school year session or type of enrollment.

County:  Provider:  School Year Session:  ☒ CB ☒ CBRS ☒ SEIT ☒ RS  
Added After:  Added Before:

County	Provider	Child	School Year	From Date	To Date	Enrollment Type	Service Type	ESID	Frequency	Date Added	Attendance	View
ROCKLAND			202223 SUM	7/4/2022	8/12/2022	RS	ST	RS2223S0041381	2x30	5/18/2022	<a href="#">Attendance</a>	<a href="#">View</a>
ROCKLAND			202223 SUM	7/4/2022	8/12/2022	RS	PNT	RS2223S0041382	1x30 MONTHLY	5/18/2022	<a href="#">Attendance</a>	<a href="#">View</a>
ROCKLAND			202223 SUM	7/4/2022	8/12/2022	RS	CSL	RS2223S0041383	1x30	5/18/2022	<a href="#">Attendance</a>	<a href="#">View</a>

# Enrollment Assignments Report

- \* Go to **Reports -> Enrollment Assignments**.
- \* You can search by school year or Provider.
- \* Easy way to access child enrollment information.
- \* You can also assign or remove therapists from assignments by clicking “*Edit Assignment*”. This will bring you to the *Assign Child’s Therapist(s) and Service Provider(s)* screen.



## Enrollment Assignments

Filters

School Year: 2021 - 2022 Summer ▼ Provider: ▼ ☒ Missing Assignments Only Retrieve

Last Name	First Name	Electronic Service ID	Related Service Code	Provider	County	District	From Date	To Date	Frequency	Individual Or Group	Therapist Last Name	Therapist First Name	
		CBRS2122S0035720	OT			SAUGERTIES CSD	07/05/2021	08/13/2021	1x30	I			Edit Assignment
		CBRS2122S0036189	ST			SAUGERTIES CSD	07/05/2021	08/13/2021	2x30	I			Edit Assignment
		CBRS2122S0036190	ST1			SAUGERTIES CSD	07/05/2021	08/13/2021	1x30	G			Edit Assignment
		CBRS2122S0036191	OT			SAUGERTIES CSD	07/05/2021	08/13/2021	1x30	I			Edit Assignment

# Enrollment and ESID #

- \* The enrollment should correspond to a unique approved service on the IEP.
- \* There will be enrollments for:
  - \* Different Service Types (OT vs PT vs ST)
  - \* Different frequencies (1x30 vs 1x45 vs 2x30)
  - \* Individual vs Group (if the CPSE determines a child should receive some individual and some group of the same service type, they should be separate enrollments).
- \* Each County created enrollment has a unique identifier called an Electronic Service Identifier or ESID for short. This is how we reference enrollments.
- \* **For HIPPA reasons, do not email child names**, use the ESID #, the Child Number, or the STAC ID #..

# How to Find an ESID #

- \* Go to **Lookup -> Child Lookup**, search child's name or child # or STAC ID #, and then click "Details".

**Child Lookup**

Name (Last,First)   [ Hide Advanced Search options ]

School Year  County  Provider  District

Child Number  STAC ID  Electronic Service ID

Child Number	Last Name	First Name	DOB	CIN	District	County	MatchStatus	
C62000182949	ALV		2/14/2018		KINGSTON CITY SD		County Record	<input type="button" value="Details"/>

Enrollments Written Orders Documents

View Information for School Year: 2021 - 2022

Strikethrough = The county deleted this enrollment

Status	School Year	From	To	ESID	Provider	Enrollment	CB Program	Service	Frequency	Individual Or Group		
	2021 - 2022 Winter	1/31/2022	6/24/2022	CBRS2122W0036073		CBRS		OT1	1x30	G	Attendances	Details
	2021 - 2022 Winter	1/31/2022	6/24/2022	CBRS2122W0036101		CBRS		OT	1x30	I	Attendances	Details
	2021 - 2022 Winter	1/3/2022	6/24/2022	CB2122W0009636		CB	Classroom (9160-I)		5 hrs/day		Attendances	Details
	2021 - 2022 Winter	1/3/2022	6/24/2022	CB2122W0009637		CB	1:1 Aide/Nurse		5 hrs/day		Attendances	Details
	2021 - 2022 Winter	1/3/2022	1/30/2022	CBRS2122W0036064		CBRS		OT	2x30	I	Attendances	Details
	2021 - 2022 Winter	1/3/2022	6/24/2022	CBRS2122W0036065		CBRS		PSY	1x30	I	Attendances	Details

# How to Find an ESID #

\* You can also go to **Lookup -> Enrollment Lookup**

**Enrollments**  
School Year Session 2021 - 2022 Summer County  ☒ CBRS ☒ RS ☒ SEIT ☒ CB   
Provider

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	CB2122S0022336			2/16/2016				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		Attendances
	CBRS2122S0020430			2/16/2016				CBRS	ST	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		Attendances
UnMatched				4/11/2017				RS	PT	7/12/2021	8/20/2021	2x30	I			0.00	0.00	6	6		Attendances
UnMatched				4/11/2021				RS	ST	7/12/2021	8/20/2021	1x30	I			0.00	0.00	6	6		Attendances
	CB2122S0021911			4/11/2017				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		Attendances
	CBRS2122S0020788			4/11/2017				CBRS	ST	7/12/2021	8/20/2021	1x30	I	9100-A		0.00	3.00	6	6		Attendances
	CBRS2122S0020789			4/11/2017				CBRS	PT	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		Attendances
	CBRS2122S0020790			4/11/2017				CBRS	HLT	7/12/2021	8/20/2021	5x15	I	9100-A		0.00	0.00	6	6		Attendances





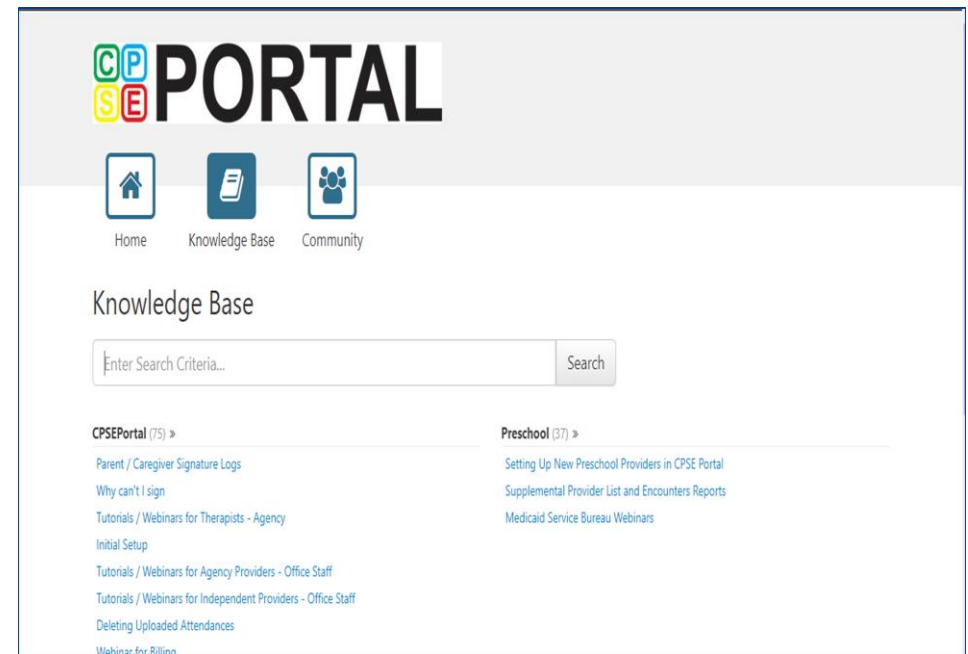
# Closing

# Important Note

- \* You **cannot** bill on Unmatched Enrollments. Therefore, you should be matching your children, and unmatched enrollments throughout the week.

# Portal Training – Knowledge Base

- \* The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Portal support.
- \* You can simply click the Knowledge Base tab in the Portal or you can go to:
- \* <http://support.cpseportal.com/kb>



# Knowledge Base Links

- \* All articles on Unmatched Children and Unmatched Enrollments:
  - \* <http://support.cpseportal.com/kb/c11/enrollments.aspx>
- \* Assigning Children to Therapist:
  - \* <http://support.cpseportal.com/kb/a34/assign-children-to-therapist.aspx?KBSearchID=19809>
- \* How to Look Up a Child by ESID #:
  - \* <http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid-.aspx?KBSearchID=19810>
- \* Enrollments Added by County Report:
  - \* <http://support.cpseportal.com/kb/a182/enrollments-added-by-county-report.aspx?KBSearchID=19788>

# Upcoming Webinars

## CPSE Portal Agency Case Management (**Agency Staff**):

- \* Tuesday, May 16, 2023 @ 10:00AM - <https://attendee.gotowebinar.com/register/4232679292531497304>
- \* Thursday, May 18, 2023 @ 2:00PM - <https://attendee.gotowebinar.com/register/6517112611329166426>

## Topics Covered During This Webinar:

- Child Lookup
- Unmatched Children and Enrollments
- Assigning Children to Therapist/SEIT
- View Unmatched Enrollments
- Matching Children
- Matching Enrollments
- Moving Attendances Between Enrollments
- Enrollment Lookup Report
- Enrollment Assignments Report

# Upcoming Webinars

## CPSE Portal Center Based (CB) Agency Case Management (**Agency Staff**):

- \* Wednesday, May 17, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/936257670592953948>
- \* Friday, May 19, 2023 @ 2:00PM -  
<https://attendee.gotowebinar.com/register/112194596295817823>

## Topics Covered During This Webinar:

- Classroom Management
- Creating a Schedule for the School
- Unmatched Children and Enrollments
- Entering and Signing Classroom Attendance
- CB Enrollments Missing Attendance

# Upcoming Webinars

## CPSE Portal Case Management for **Independent Providers**:

- \* Wednesday, May 24, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/2211758229022601046>
- \* Thursday, June 1, 2023 @ 4:00PM -  
<https://attendee.gotowebinar.com/register/5421969343291392093>

### Topics Covered During This Webinar:

- Child Lookup
- Unmatched Children and Enrollments
- Enrollment Lookup Report
- My Caseload
- Digital Orders
- Moving Attendances Between Enrollments

# Upcoming Webinars

## CPSE Portal Case Management for **Agency Service Providers**:

- \* Friday, May 26, 2023 @ 3:00PM -  
<https://attendee.gotowebinar.com/register/4803077337760550746>
- \* Wednesday, May 31, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/2931509535681214299>

## Topics Covered During This Webinar:

- What are Unmatched Enrollments
- My Caseload
- Digital Orders
- Reports



# Upcoming Webinars

## CPSE Portal Session Notes (**ALL Agency, Agency Service Providers & Independent Providers**):

- \* Wednesday, June 7, 2023 @ 4:00PM - <https://attendee.gotowebinar.com/register/2558356179935036505>
- \* Friday, June 9, 2023 @ 10:00AM – <https://attendee.gotowebinar.com/register/1511566134710937431>

## Topics Covered During This Webinar:

- Recap Entering/Signing Classroom Attendance
- Attendance Entry Record
- Creating Defaults for Session Notes
- Signing Attendance/Review & Sign
- Co-Signing Session Notes/Attendance
- Un-signing Attendance/Making Corrections After Signing
- Printing Logs
- Reports

# Upcoming Webinars

## CPSE Digital Speech Recommendations (**Agencies and SLP's only**):

- \* Tuesday, June 6, 2023 @ 3:00PM -  
<https://attendee.gotowebinar.com/register/1959650108113136987>
- \* Thursday, June 8, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/8298551246032462681>

## Topics Covered During This Webinar:

- How to Create the Digital Recommendation / Order
- When to Create the Digital Recommendation / Order
- One-time Set-up for the SLP and Billing Agency
- Creating Unmatched Records

# Upcoming Webinars

## CPSE Portal Agency Billing Using the CPSE Portal (**Agency Billing Admins only**):

- \* Tuesday, July 25, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/9055301119231125080>
- \* Thursday, July 27, 2023 @ 2:00PM -  
<https://attendee.gotowebinar.com/register/5770436463971289695>
- \* Wednesday, September 27, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/4933499208024528219>

# Upcoming Webinars

## **CPSE Portal Agency Billing Using the CPSE Portal (con't):**

### **Topics Covered During This Webinar:**

- Review Portal Invitations
- Review Portal Admin – User Access
- Review Credential Verification
- Creating & Submitting Vouchers
- How to Correct Attendance & Rebill
- Items Not Ready To Bill Report
- Voucher Listing Report

# Upcoming Webinars

## CPSE Portal Billing for **Independent Providers**:

- \* Tuesday, August 1, 2023 @ 4:00PM -  
<https://attendee.gotowebinar.com/register/2592921526977985629>
- \* Thursday, August 3, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/4132709496352725084>
- \* Thursday, September 28, 2023 @ 4:00PM -  
<https://attendee.gotowebinar.com/register/8295469315205738336>

## Topics Covered During This Webinar:

- Creating & Submitting Vouchers
- How to Correct Attendance & Rebill
- Items Not Ready To Bill Report
- Voucher Listing Report

# Upcoming Webinars

## CPSE Portal Billing Using an Outside System (**Agency Billing Admin's only not using the Portal**):

- \* Wednesday, July 26, 2023 @ 10:00AM - <https://attendee.gotowebinar.com/register/2511961187289860190>
- \* Friday, July 28, 2023 @ 2:00PM - <https://attendee.gotowebinar.com/register/6770055261340792925>
- \* Tuesday, September 26, 2023 @ 10:00AM - <https://attendee.gotowebinar.com/register/2044012337043337049>

## Topics Covered During This Webinar:

- Review of Import Person with License Template
- Review Credential Verification
- Schema Attendance File
- Validate Attendance File
- Upload Attendance File
- Creating Vouchers
- Submitting Vouchers
- Attendance Denied – How to Rebill
- Voucher Listing Report

# Closing Remarks

- \* CPSE Portal Address (you may want to bookmark):  
<https://www.cpseportal.com>
- \* In addition to the Portal Knowledge Base, our Helpdesk is available through email at [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
  - \* When sending an email:
    - \* Do **not** use child's name
    - \* Use ESID #, Child # or STAC ID #
    - \* Include your county, and info needed