CPSE Portal Center Based (CB) Agency Case Management
5/17/2023 & 5/19/2023

Questions & Answers

	Topic/Category
	UNMATCHED CHILDREN/ENROLLMENTS
Q	You must match unmatched children and their unmatched enrollments separately? Two steps, not 1?
A	**YES**. You will match the Unmatched Child first, and then match all of the Unmatched Enrollments.
Q	I have trouble matching enrollments as we are a CBRS and the options to add enrollments are only CB or RS and so they never match.
A	This is because you are creating unmatched RS enrollments instead of unmatched CBRS. After you create the unmatched CB enrollment, then you will go to *Caseload Maintenance -> CBRS Enrollments*. You will search for the child and select the unmatched CB enrollment. Then you will create the unmatched CBRS enrollments on this screen.
Q	If a provider matches a child by accident is it possible to remove that enrollment? How would this be handled?
A	We would have our technical team look at this to see how it needs to be handled.
Q	Will it match if the dates to and from you entered does not match what the County inputted?
A	You will go to *Caseload Maintenance -> Add/Edit Unmatched Enrollments*, and Edit the child and change the dates to match the County. You can also contact the County to verify that their dates are correct if you were given different dates.
	CLASSROOMS
Q	Can you create one classroom, and add all the kids and all the teachers? Or, do you need a classroom based on one teacher?
A	It is suggested that you create each teacher's classroom by itself. Creating one classroom may cause multiple issues later on.
Q	Do you have to add the teacher aides and teaching assistants to the classroom if they are not doing attendance?
A	**NO**. You will only need to add them to the classroom if they are taking attendance.
Q	Do you need to have attendance separate from the classroom attendance for 1:1 Aides?
A	**YES**. You will have the attendance for the child in the classroom, and you will also have the attendance for the child in the Aide classroom.

Q	How do you assign the Teacher to the CB?
A	You will assign the teacher to the CB the same as assigning a therapist. Go to *Caseload Maintenance -> Assign Child's Therapist(s) and Service Provider(s)* and choose the enrollment containing the CB.
Q	If a child is marked absent in the classroom does the AIDE classroom need to be marked absent separately?
A	**YES**. The classroom would be marked absent, and the AIDE classroom would also be marked absent.
Q	When a child switches classroom or Program Code, if the agency changes the start and end date or with a new IEP does the county change the start/end dates?
A	If the child requires a new IEP, then the County will end date the CB enrollment, and create a new CB enrollment with a new start date. If the child is only going from one classroom to another but has not changed programs, then the County will not change the enrollment. You will simply move the child from one teacher's classroom into another.
	CLASSROOM SCHEDULE
Q	Does the classroom schedule carryover to therapists entering information for the closed days as well?
A	**NO**. The classroom schedule is only for classroom teachers.
	CLASSROOM ATTENDANCE
Q	How do you change attendance that is incorrect after you signed it?
A	You will go to *Attendance -> Digital Signature -> Unsign Classroom Attendance*, and choose what attendances need to be unsigned. Only the teacher / Aide / or Agency Billing Admin that signed the attendance can unsign the attendance.
Q	Can the classroom teaching assistant do the attendance for the 1:1 aide assigned to the student?
A	**YES.** You will need to assign the TA to the Aide classroom, and the TA can then take attendance.
	MISCELLANEOUS
Q	Who uploads prescriptions and STACs?
A	This depends on the County that you service. Each County determines what is best for their County.
Q	Are there any reports which includes Program Code and services delivered? This information is need for State reporting?
A	There is not a report that will give you all of the information that is needed. You can however go to *Reports ->Submitted Session Listing,* and this will give you the # of sessions provided for that enrollment.
Q	If a therapist leaves our organization, do you delete them totally from the Portal?
A	You should not delete the therapist until you are sure that all notes are signed & correct. You can go to your list of Users, and uncheck their service provider box.