SUPERVISION QUICK REFERENCE GUIDE

The process for entering a Supervision Plan is noted below:

1) **Select the Service Provider and Supervisor** (Supervision Plan)
   a. Go to Medicaid or Caseload Maintenance>Supervision>Supervision Plans>Filter>Retrieve
   b. Copy Plans from a Prior Session or Create Plans from Pre-License Plans *(if there are any Plans to copy)*
   c. If there are no Plans from a Prior Session or Pre-License Plans to copy,
      Select the Service Provider & Supervisor from the respective drop-downs to create the Supervision Plan
   d. Click the ***Details*** Link at the end of the row on the ***Supervision Plan Listing Screen*** to assign the child/enrollment to the Supervision Plan.

2) **Assign the Enrollment Plan (child & enrollment) to the Supervision Plan** (Service Provider & Supervisor)
   Create Plans Manually:
   a. Click the ***Details*** Link at the end of the row on the ***Supervision Plan Listing Screen*** to assign the child/enrollment to the Supervision Plan
   b. Click the ***"Add a Supervision Plan for an Enrollment"*** button (to create Plans manually)
   c. Select the specific Supervision Plan (Service Provider/Supervisor) in the *Supervision Plans* grid
   d. Select all the children and enrollments that apply to the specific (selected) Supervision Plan
   e. Click ***Create Enrollment Supervision Plans*** *button*

   Create Plans with Automatically:
   a. Click the ***Details*** Link at the end of the row on the ***Supervision Plan Listing Screen.***
   b. Click the ***"Auto Create Enrollment Plans"*** button (to create Plans Automatically)
   c. If the enrollment, service provider and supervisor have one signed attendance in the Portal, the enrollment will be attached automatically to the Supervision Plan after clicking the *Auto Create Enrollment Plans* button.
   d. Click on the ***Add/View Face to Face Meeting Dates*** Link to add the observation dates.

3) **Enter the Face-to-Face Meeting Date**
   (Medicaid or Caseload Maintenance>Supervision>Enrollment Needing First Visit)
   a. Filter for County, Provider, School Year Session, Click the *Missing* Radio Button, Click *Retrieve*
   b. Click the *Add Meeting Date* Link at the end of the row
   c. Enter the meeting date in the data entry box and click the *Update* link at the end of the row.

4) **Upload the Required Audit Documentation**
   a. Click the ***Details*** Link at the end of the row on the ***Supervision Plan Listing Screen***
   b. Click the *Supervision Documents Tab*
   c. Click *Choose File*
   d. Select *Document Type*
   e. Click *Upload Document (If you need to upload documentation for a child, you will need to select the specific child from the "Enrollment Supervision Plan" Drop-Down.)*