

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: *(Use this option if there is no signed/co-signed attendances)*
 - 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: *(To use this option you must have a signed/co-signed attendance)*
 - 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.)*