CPSE Portal
Agency Case Management

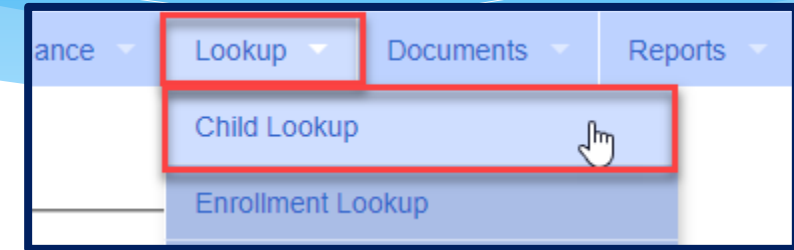JAMES McGUINNESS & ASSOCIATES INC.
Consultants

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: sch   [Search]   [Show Advanced Search options]

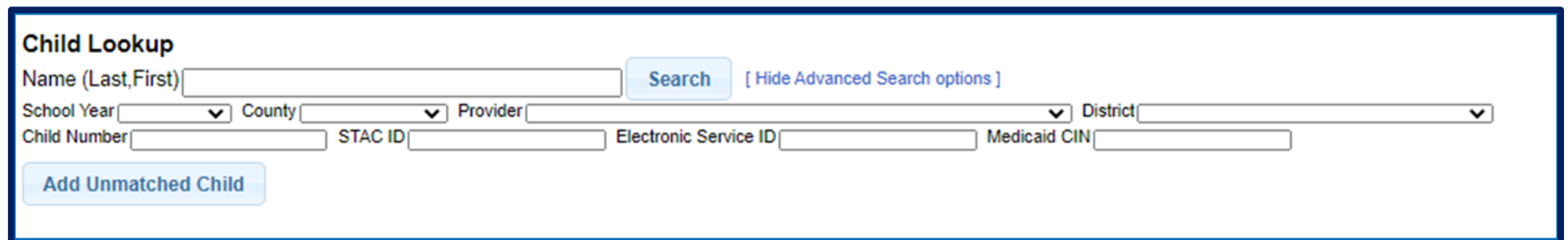| Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	
SCHAFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	Details
SCHAFFER	LATRICIA	5/12/2011	F35053	Iroquois	ERIE	County Record	Details
SCHMITT	FREDDIE	3/1/2012	G04529	Orchard Park	ERIE	County Record	Details
SCHULZ	FREDERIC	3/3/2011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

Child Lookup Advanced Search

* Click "Show Advanced Search options" to see additional search criteria:

Child Lookup

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

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

Child Lookup

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

School Year [____ ▾]   County [_____ ▾]   Provider [_____ ▾]   District [_____ ▾]

Child Number [_____]   STAC ID [_____]   Electronic Service ID [_____]   Medicaid CIN [_____]

Add Unmatched Child

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)

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	Edit	Delete

* 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	Update	Cancel

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.

Caseload Maintenance   Lookup   Docum

CBRS Enrollments

Assign Child's Therapist(s) and Service Provider(s)

Unmatched Children

Add / Edit Unmatched Enrollments

View Unmatched Enrollments

County Rescinded Enrollments

Rescinded CB Enrollments w/ CBRS

Caseload

Upload Prescription Details

Enrollments Missing First CoVisit

Adding an Unmatched Enrollment (Related Service & SEIT)

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

    * Search child's name, and click "*Select*"
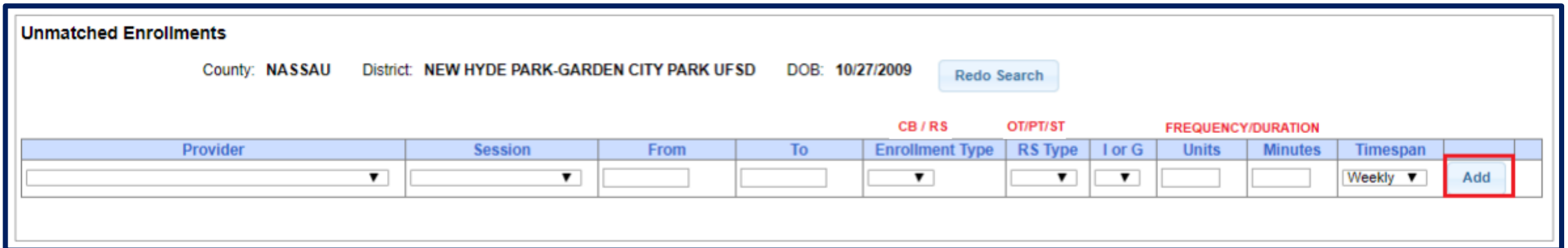
Unmatched Enrollments

Name (Last,First) | Type Name>SEARCH | Search | [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**   Redo Search

Provider	Session	From	To	CB / RS Enrollment Type	OT/PT/ST RS Type	I or G	FREQUENCY/DURATION Units	Minutes	Timespan	
▼	▼			▼	▼	▼			Weekly ▼	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 ▼	Add
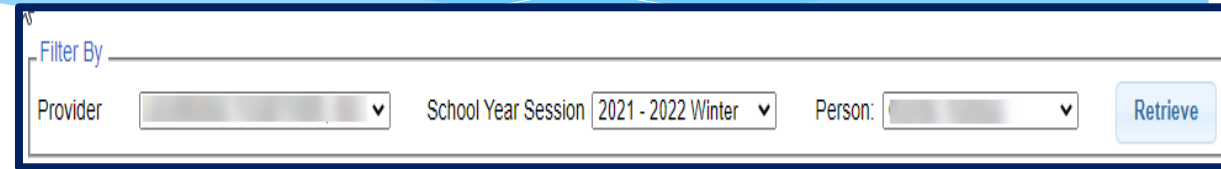
Assigning Therapist to Children

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.
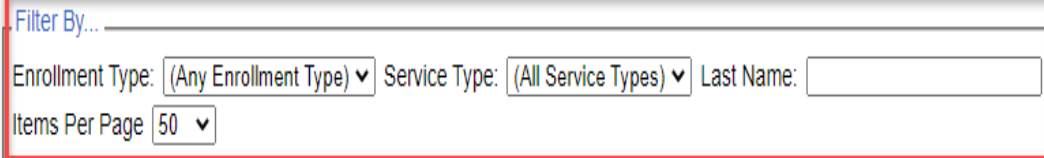
  * Click "*Add New Assignment*".

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

Filter By

| Provider | [blurred] | School Year Session | 2021 - 2022 Winter | Person: | [blurred] | Retrieve |

Add New Assignment

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

Filter By...

Enrollment Type: (Any Enrollment Type) ▾   Service Type: (All Service Types) ▾   Last Name: [_____]

Items Per Page 50 ▾

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.

Assigning Children to Therapist

* Go to **Caseload Maintenance -> Assign Child's Therapist(s) and Service Provider(s).**

* Search for child, and then click "*Select*".

* This will bring up all of the enrollments for the child.

* Now "*Select*" the enrollment.

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*".

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".

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

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		ANNELIESE		12/12/2018		NEW PALTZ CSD					
Select		DANNIELLE		12/12/2018		NEW PALTZ CSD					

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!*"

View Unmatched Enrollments

* Go to *Caseload Maintenance –> View Unmatched Enrollments.*

* 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: 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	

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!*"

Reports

Enrollment Lookup Report

* A report of all enrollments.

* Go to *Lookup -> Enrollment Lookup*

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 [2021 - 2022 Summer ▾] County [_____ ▾] ☑CBRS [Search]
Provider [_____ ▾] ☑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			E	RS	PT	7/12/2021	8/20/2021	2x30	I			0.00	0.00	6	6		Attendances
UnMatched				4/11/2017			E	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	ALT		4/11/2017			EAST RAMAPO CSD	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: [2022 - 2023 Summer ▾] ☑CB ☑CBRS ☑SEIT ☑RS
Added After: [   ] Added Before: [   ] [Retrieve]

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	Attendance	View
ROCKLAND			202223 SUM	7/4/2022	8/12/2022	RS	PNT	RS2223S0041382	1x30 MONTHLY	5/18/2022	Attendance	View
ROCKLAND			202223 SUM	7/4/2022	8/12/2022	RS	CSL	RS2223S0041383	1x30	5/18/2022	Attendance	View

Support@CPSEPortal.com

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: [blurred] ▾ ☑ 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*".

How to Find an ESID

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

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*

Support@CPSEPortal.com
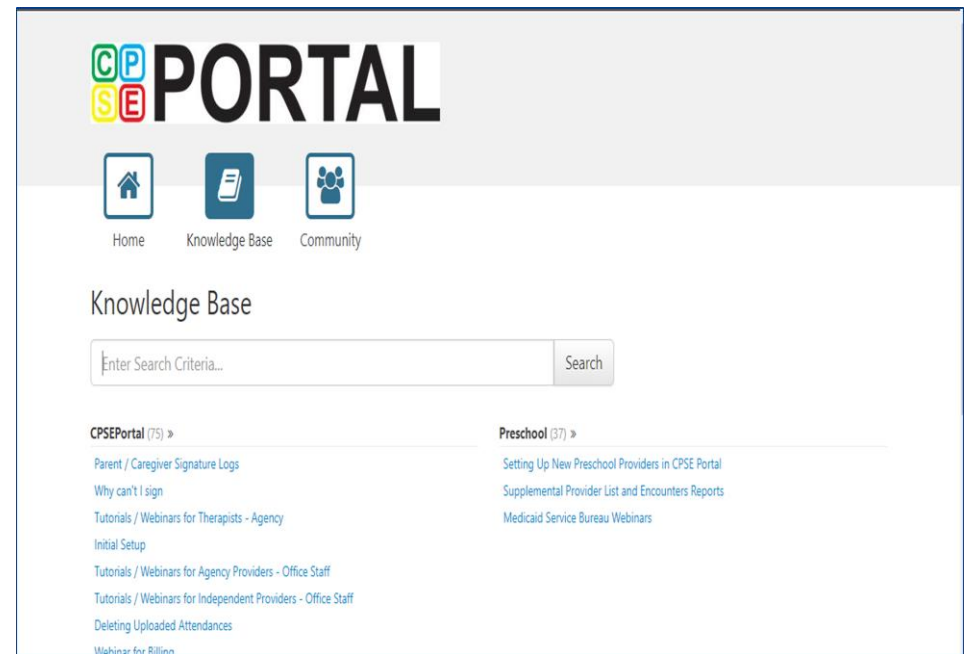
Knowledge Base Links

* 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*

Support@CPSEPortal.com

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*
  * When sending an email:
    * Do **not** use child's name
    * Use ESID #, Child # or STAC ID #
    * Include your county, and info needed

Support@CPSEPortal.com