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 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
  * Child #
  * 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

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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, you can create a temporary child and temporary enrollment records.
    * These are created when the County is delayed in entering data.
    * You 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, then you 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 #.

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 #..

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.

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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

* Go to *Caseload Maintenance -> Add/Edit Unmatched Enrollments*
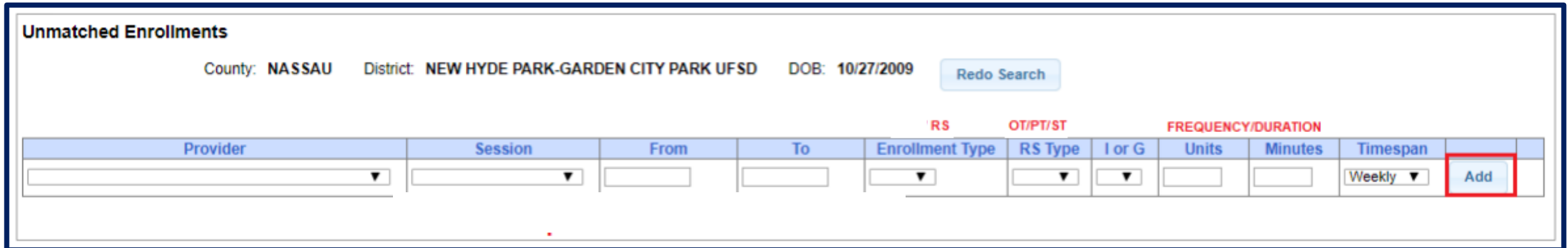
    * Search child's name, and click "*Select*"

Unmatched Enrollments

Name (Last,First) | Type Name>SEARCH | Search | [Show Advanced Search options]

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

    * Your name will appear in the Provider box, 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	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.

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	**RS** Enrollment Type	**OT/PT/ST** RS Type	I or G	**FREQUENCY/DURATION** Units	Minutes	Timespan	
▼	▼			▼	▼	▼			Weekly ▼	Add

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*".

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.

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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:

    , NEAL   County: **ERIE**   District: **Orchard Park**   DOB: **7/22/2011**

Current Unmatched Enrollment:
    Session: **2015 - 2016 Winter**   From Date: **3/30/2016**   To Date: **6/24/2016**
    Enrollment Type: **RS**   Service Type: **ST**   Individual or Group: **I**   Frequency: **1x30**

Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2015 - 2016 Winter	9/1/2015	6/30/2016	I	2x30	RS1516W0061795

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!*"

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Prescriptions

Creating Digital Orders (SLP's)

* Go to *Caseload Maintenance -> Prescriptions for Caseload*
  * Use this option for initial prescriptions.

* Go to *Caseload Maintenance -> Create New Order*
  * Use this option for subsequent prescriptions:
    * Example: when there is a change in service and a previous prescription already exists.

    http://support.cpseportal.com/kb/a160/creating-digital-speech-recommendations-slps.aspx?KBSearchID=19946

Prescriptions for Caseload (SLPs)

* Go to **Caseload Maintenance -> Prescriptions for Caseload**
* Here you will find:
  * A list of children on your caseload,
  * Status of your prescription,
  * Existing Speech Recommendations and enrollments that need an RX.
* If you click on "*View*", you will be able to view or print the digital speech recommendation.

Link is removed when Rx is completed.

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
			9/8/2020	6/25/2021	ST 1x30 Individual	VERIFIED	View	View	
RS2021W01			9/8/2020	6/25/2021	ST 1x60 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
RS2021W01			9/8/2020	6/25/2021	ST 1x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

Create Digital Order

* Go to *Caseload Maintenance -> Create New Order*
  * Search for child, and choose "*Select*".

Create Digital Order

* Enter your Date Range, ICD Code, and click "*Preview and Sign*".
* This will then ask for your PIN #.

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Reports

Enrollment Lookup Report

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

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				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			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			EAST RAMAPO CSD	CBRS	HLT	7/12/2021	8/20/2021	5x15	I	9100-A		0.00	0.00	6	6		Attendances

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				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	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

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) alv   [Search]   [Hide Advanced Search options]

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

Child Number [____]   STAC ID [____]   Electronic Service ID [____]

[Add Unmatched Child]

Child Number	Last Name	First Name	DOB	CIN	District	County	Match Status	
C62000182949	ALV...		2/14/2018		KINGSTON CITY SD		County Record	Details

Enrollments   Written Orders   Documents

View Information for School Year: [2021 - 2022 ▾]

Strikethrough = The county deleted this enrollme

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*

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My Caseload

* Go to *Caseload Maintenance -> My Caseload*
  * You can also see all of the attendances that you have entered for each child.

My Caseload

Filter By

Provider: [_____] ▼   Session: [2021 - 2022 Winter] ▼   [Search]

	Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned		
☐		RS2122W0001572		KILLYIN	COLUMBIA		NEW LEBANON CSD	RS	12/06/21	06/24/22	OT 1x30 Individual	YES	Attendances	Defaults
☐		CPSECBRS0000118175		TRAVIS	Albany		RAVENA-COEYMANS-SELKIRK CSD	CBRS	03/21/22	06/24/22	OT 1x30 Individual	YES	Attendances	Defaults
☐		RS2122W0001529		WILLIAM	COLUMBIA		NEW LEBANON CSD	RS	09/08/21	06/24/22	OT 2x30 Individual	YES	Attendances	Defaults
☐		CBRS2122W0001937		SAVANNAH	COLUMBIA		GERMANTOWN CSD	CBRS	12/06/21	06/24/22	OT 2x30 Individual	YES	Attendances	Defaults

[Excel] [Generate Blank Signature Logs for Selected Enrollments]
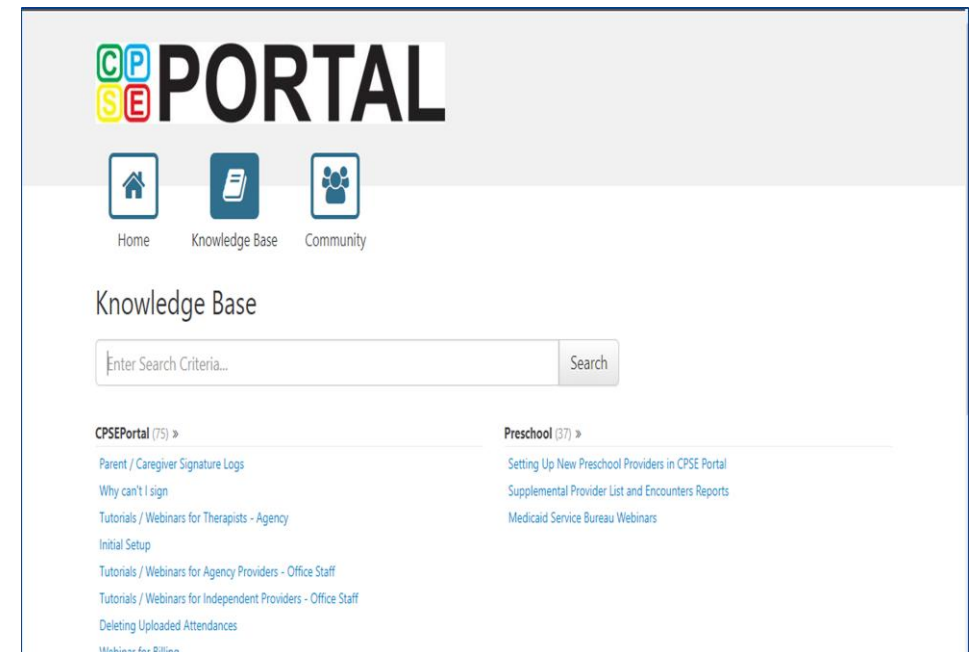
Closing

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*

* Creating Digital Speech Recommendations (SLPs):
  * *http://support.cpseportal.com/kb/a160/creating-digital-speech-recommendations-slps.aspx?KBSearchID=19946*

* 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*

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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 STAC ID # or ESID #
    * Include your county, and info needed

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