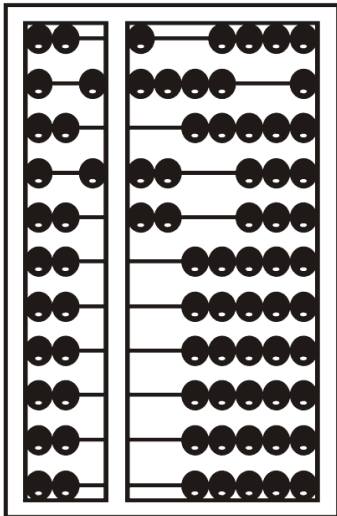
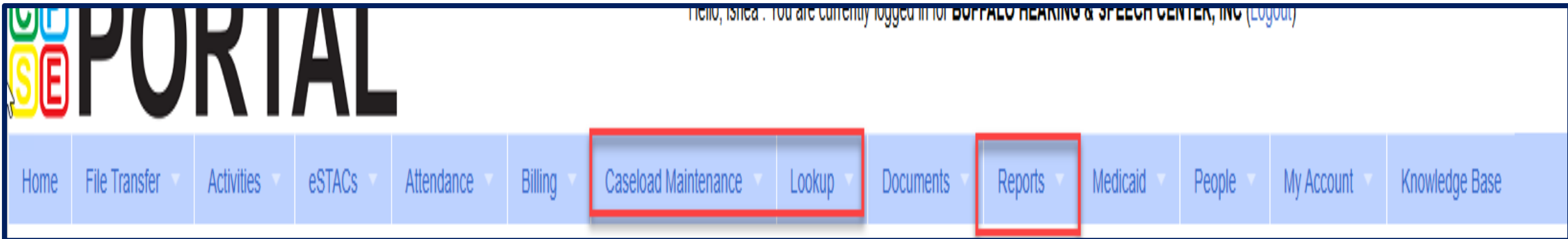


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& ASSOCIATES INC.
Consultants



CPSE Portal Agency Case Management

Tabs Covered In Webinar

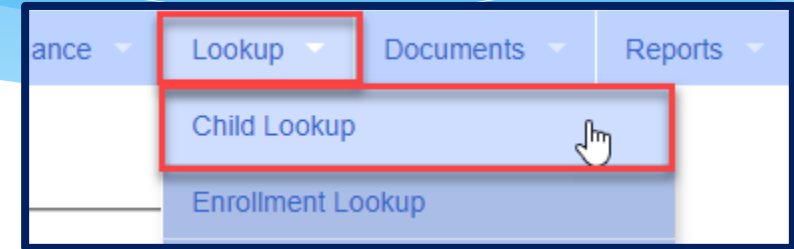




How To Look Up Children In The Portal

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 [Show Advanced Search options]

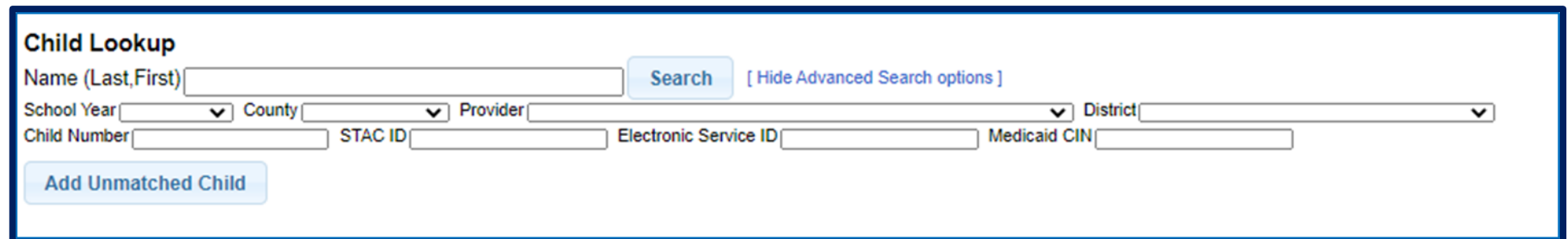
Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	
SCHAFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	Details
SCHAFFER	LATRICIA	5/12/2011	F35053	Iroquois	ERIE	County Record	Details
SCHMITT	FREDDIE	3/1/2012	G04529	Orchard Park	ERIE	County Record	Details
SCHULZ	FREDERIC	3/3/2011		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

- * You can also lookup children by other information.
- * Click “**Show Advanced Search options**” to see additional search criteria:
 - * School Year
 - * County
 - * Provider
 - * District
 - * STAC ID #
 - * Electronic Service ID #



This screenshot shows the basic 'Child Lookup' form. It includes a title 'Child Lookup', a text input field for 'Name (Last,First)', a 'Search' button, and a link '[Hide Advanced Search options]' which is highlighted with a red rectangle.



This screenshot shows the advanced 'Child Lookup' form. It includes the same title and name field as the basic form, but also features a 'Search' button, a '[Hide Advanced Search options]' link, and several additional search criteria: 'School Year' (dropdown), 'County' (dropdown), 'Provider' (text input), 'District' (dropdown), 'Child Number' (text input), 'STAC ID' (text input), 'Electronic Service ID' (text input), and 'Medicaid CIN' (text input). At the bottom, there is an 'Add Unmatched Child' button.



Unmatched Children and Unmatched Enrollments

Unmatched Children & Enrollments

- * Typically, all information about a child and the services they are receiving are entered into eSTACs by the school district. The County then uploads from their Preschool system into the CPSE Portal.
 - * However, an agency can create a temporary child and temporary enrollment records.
 - * These are created when the school district 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 #.

Enrollment and ESID # (Electronic Service ID Number)

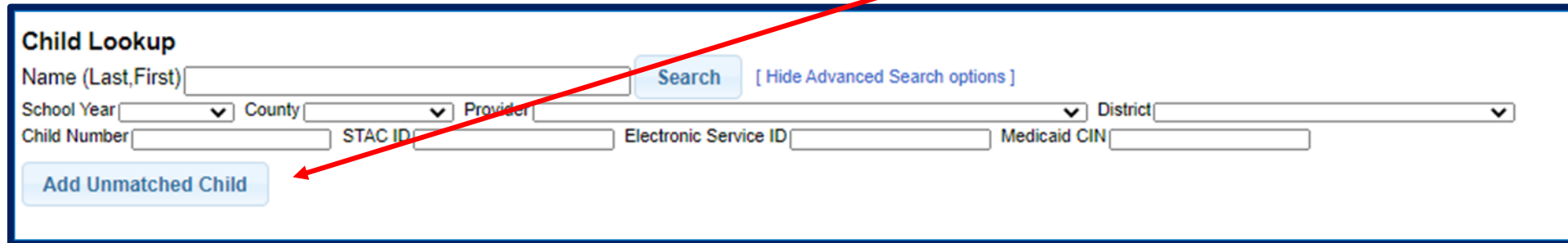
- * The enrollment should correspond to a unique approved service on the IEP.
- * There will be enrollments for:
 - * Different Service Types (OT vs PT vs ST)
 - * Different frequencies (1x30 vs 1x45 vs 2x30)
 - * Individual vs Group (if the CPSE determines a child should receive some individual and 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.



Creating Unmatched Children

Creating an Unmatched Child Under the Lookup Tab

- * You can add an Unmatched Child two different ways.
- * Go to **Lookup -> Child Lookup** and search for the child.
- * If the child is not in the Portal, you can then click on “Add Unmatched Child”.



The screenshot shows the 'Child Lookup' interface. It includes a search bar for 'Name (Last,First)' with a 'Search' button and a link to '[Hide Advanced Search options]'. Below the search bar are several dropdown menus for 'School Year', 'County', 'Provider', and 'District'. There are also input fields for 'Child Number', 'STAC ID', 'Electronic Service ID', and 'Medicaid CIN'. At the bottom left, there is a button labeled 'Add Unmatched Child'. A red arrow points from the text 'Add Unmatched Child’' in the list above to this button.

Creating an Unmatched Child Under the Caseload Maintenance Tab

- * Go to **Caseload Maintenance** -> **Unmatched Children** and click “Add Child”
- * Fill in the “Add Child” screen and click “Add” (address & phone # are optional)
- * The child will then be given a child #.

Add Child

Provider

County District

Last Name First Name MI

DOB Gender

Address 1 Address 2

City State Zip

Home Phone

SEDSTACID

Add

Editing an Unmatched Child

Unmatched Children															
Add Child															
Child Number	Last Name	First Name	MI	DOB	Gender	County	District	Address1	City	State	Zip	HomePhone			
C14000241462	LACY	IVORY		10/1/2019	m	ERIE	Cheektowaga-Sloan						Enrollments	Attempt Match	Edit
C40000198044	PEARCE	BERYL		11/15/2018	F	NIAGARA	NIAGARA FALLS CITY SD						Enrollments	Attempt Match	Delete
C40000190740	RANGEL	LANDON		2/23/2017	M	NIAGARA	NORTH TONAWANDA CITY SD						Enrollments	Attempt Match	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	Gender	County	District	Address1	City	State	Zip	HomePhone			
C14000241462	LACY	IVORY		10/1/2019	m	ERIE	Cheektowaga-Sloan						Enrollments	Attempt Match	Update
C40000198044	PEARCE	BERYL		11/15/2018	F	NIAGARA	NIAGARA FALLS CITY SD						Enrollments	Attempt Match	Delete
C40000190740	RANGEL	LANDON		2/23/2017	M	NIAGARA	NORTH TONAWANDA CITY SD						Enrollments	Attempt Match	Delete



Creating Unmatched Enrollments

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.




Adding Unmatched Enrollments from the Unmatched Children Screen

- * You can add an enrollment by choosing the “Enrollments” button on your unmatched child (RS or SEIT). Go to **Caseload Maintenance -> Unmatched Children**.

Unmatched Children Add Child

Child Number	Last Name	First Name	MI	DOB	Gender	County	District	Address1	City	State	Zip	HomePhone				
C14000241462	LACY	IVORY		10/1/2019	m	ERIE	Cheektowaga-Sloan						Enrollments	Attempt Match	Edit	Delete



- * Enter all data on the blank row and click “Add”

Unmatched Enrollments

LACY, IVORY County: ERIE District: Cheektowaga-Sloan DOB: 10/1/2019 Redo Search

Provider	Session	From	To	SEIT/RS Enrollment Type	OT/PT/ST RS Type	I or G	Frequency/Duration Units	Minutes	Timespan			
BUFFALO HEARING & SPEECH CENTER, INC	2023 - 2024 Winter	9/1/2023	6/30/2024	RS	ST	I	2.00	30	Weekly	Edit	Attempt Match	Delete
BUFFALO HEARING & SPEECH CENTER, INC ▼	▼			▼	▼	▼			Weekly ▼	Add		

Adding Unmatched Enrollments from the Add/Edit Unmatched Enrollments Screen

- * You can also go to **Caseload Maintenance -> Add/Edit Unmatched Enrollments**

- * Search child's name, and click "Select"

- * 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"

- * All of the information entered should match the IEP.

Unmatched Enrollments

Name (Last,First) [Show Advanced Search options]

Unmatched Enrollments

LACY, IVORY County: ERIE District: Cheektowaga-Sloan DOB: 10/1/2019

Provider	Session	From	To	SEIT/RS Enrollment Type	OT/PT/ST RS Type	I or G	Frequency/Duration Units	Minutes	Timespan		
BUFFALO HEARING & SPEECH CENTER, INC	2023 - 2024 Winter	9/1/2023	6/30/2024	RS	ST	I	2.00	30	Weekly	<input type="button" value="Edit"/>	<input type="button" value="Attempt Match"/>
<input type="text" value="BUFFALO HEARING & SPEECH CENTER, INC"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Weekly"/>	<input type="button" value="Add"/>	<input type="button" value="Delete"/>

OT1 / PT1 / ST1 are group services

© Jarvis Quinn & Associates

- AUD
- COR
- CSL
- HLT
- INT
- MUS
- OM
- OT
- OT1
- OTH
- PLA
- PNT
- PSY
- PT
- PT1
- SOC
- ST
- ST1
- TDF
- TVI



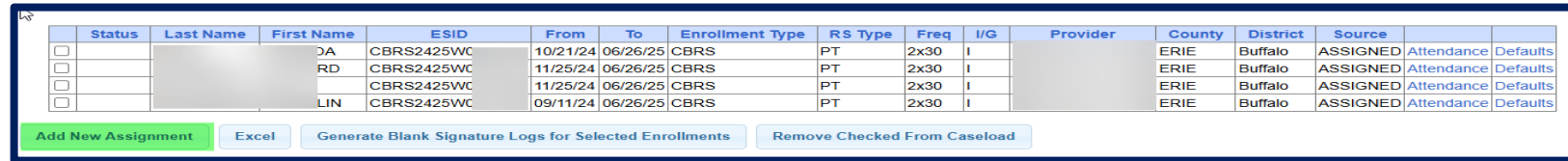
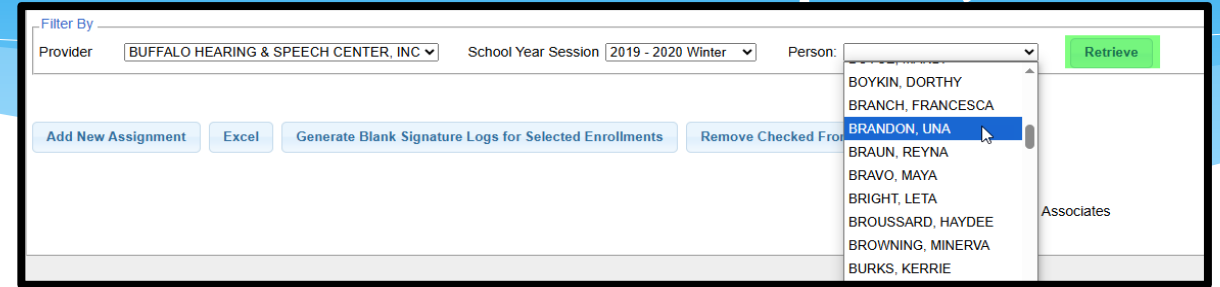
Assigning Therapist and Children

Assigning Enrollments to Therapist or Assign Therapist to Child

- * This function can be done two different ways.
 - * 1. The agency can select the therapist, and assign children to the therapist's caseload by choosing specific students.
 - * This is very helpful at the beginning of the school year when there are many children that need to be assigned to the therapist.
 - * 2. The agency can select one child, and assign each therapist to the specific service.
 - * This is more common when there is a new student entering during the year.
- * Therapist's must be assigned to the child/enrollment in order for the therapist to create session notes.

Assigning Enrollments to Therapist (Assign multiple children to one 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.



Status	Last Name	First Name	ESID	From	To	Enrollment Type	RS Type	Freq	I/G	Provider	County	District	Source	Attendance	Defaults
<input type="checkbox"/>	DA		CBRS2425WC	10/21/24	06/26/25	CBRS	PT	2x30	I		ERIE	Buffalo	ASSIGNED	Attendance	Defaults
<input type="checkbox"/>	RD		CBRS2425WC	11/25/24	06/26/25	CBRS	PT	2x30	I		ERIE	Buffalo	ASSIGNED	Attendance	Defaults
<input type="checkbox"/>			CBRS2425WC	11/25/24	06/26/25	CBRS	PT	2x30	I		ERIE	Buffalo	ASSIGNED	Attendance	Defaults
<input type="checkbox"/>	LIN		CBRS2425WC	09/11/24	06/26/25	CBRS	PT	2x30	I		ERIE	Buffalo	ASSIGNED	Attendance	Defaults

Assign Cases To Dana [REDACTED] for the 202425 WIN session

Filter By...

Enrollment Type: (Any Enrollment Type) Service Type: (All Service Types) Last Name:

Items Per Page 50

Retrieve

Assign Selected to Dana [REDACTED]

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.

Filter By... Enrollment Type: (Any Enrollment Type) Service Type: PT Last Name: Items Per Page 50

Assign Selected to Dana Return to Caseload

	Status	Last Name	First Name	ESID	From	To	Enrollment Type	RS Type	Freq	I/G	Provider	County	District	
<input type="checkbox"/>			AH	CBRS2425W00	9/5/2024	11/24/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			AH	CBRS2425W00	11/25/2024	6/26/2025	CBRS	PT	1.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			AH	CBRS2425W00	11/25/2024	6/26/2025	CBRS	PT	1.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			NDA	CBRS2425W00	9/17/2024	10/20/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			HAM	CBRS2425W00	9/9/2024	11/24/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			HAM	CBRS2425W00	11/25/2024	6/26/2025	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			RI	CBRS2425W00	9/5/2024	12/31/2024	CBRS	PT	3.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			RI	CBRS2425W00	1/2/2025	6/26/2025	CBRS	PT	3.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			IARD	CBRS2425W00	9/5/2024	11/24/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			ON	CBRS2425W00	9/6/2024	11/24/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			ON	CBRS2425W00	11/25/2024	6/26/2025	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance

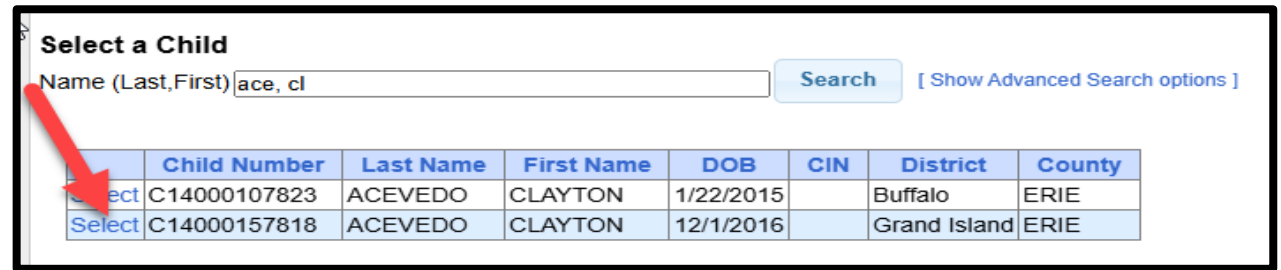
Assigning Children to Therapist (Assign one child to multiple services)

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



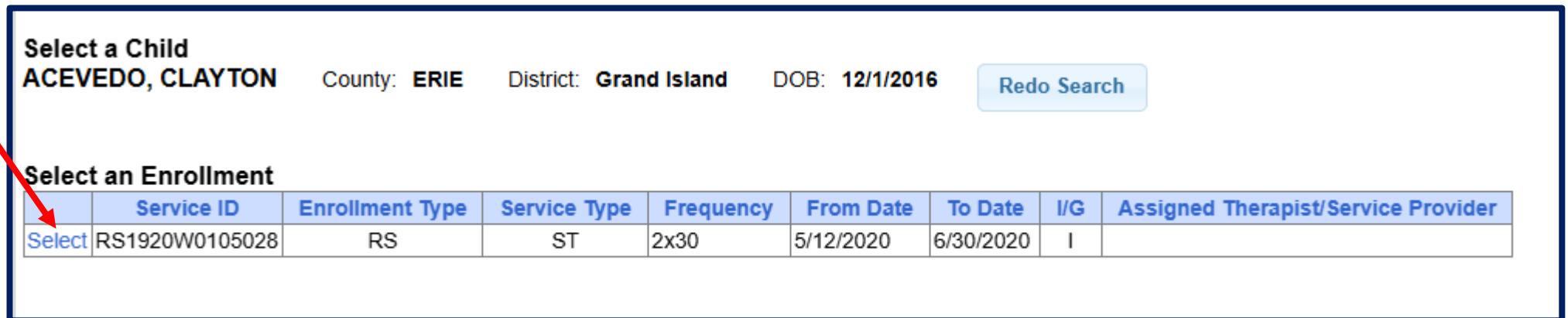
A screenshot of a software menu. The 'Caseload Maintenance' dropdown is open, showing three options: 'Caseload Maintenance', 'CBRS Enrollments', and 'Assign Child's Therapist(s) and Service Provider(s)'. The third option is highlighted with a red box and a mouse cursor icon.

- * Search for child, and then click “Select”.
- * This will bring up all of the enrollments for the child.
- * Now “Select” the enrollment.



A screenshot of the 'Select a Child' search results page. It features a search bar with the text 'Name (Last,First) ace, cl' and a 'Search' button. Below the search bar is a table with two rows of child data. A red arrow points to the 'Select' button in the first row.

	Child Number	Last Name	First Name	DOB	CIN	District	County
Select	C14000107823	ACEVEDO	CLAYTON	1/22/2015		Buffalo	ERIE
Select	C14000157818	ACEVEDO	CLAYTON	12/1/2016		Grand Island	ERIE



A screenshot of the 'Select an Enrollment' page. It shows the child's name 'ACEVEDO, CLAYTON' and search criteria: 'County: ERIE', 'District: Grand Island', and 'DOB: 12/1/2016'. Below this is a table with one row of enrollment data. A red arrow points to the 'Select' button in the first row.

Select a Child
ACEVEDO, CLAYTON County: ERIE District: Grand Island DOB: 12/1/2016 Redo Search

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1920W0105028	RS	ST	2x30	5/12/2020	6/30/2020	I	

Assigning Children to Therapist

- * Select a therapist from the Available Therapists section, and click “Add Therapist(s)/Service Provider(s)”. You can have more than one therapist assigned.
- * To remove assigned therapists, select the therapist from the Assigned Therapists section, and click “Remove Therapist”.


Select a Child
ACEVEDO, CLAYTON County: **ERIE** District: **Grand Island** DOB: **12/1/2016** Redo Search

Select an Enrollment

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1920W0105028	RS	ST	2x30	5/12/2020	6/30/2020	I	

Assigned Therapists


	Last Name	First Name	NPI
<input type="checkbox"/>	ANDRADE	ALAN	1720243496



Remove Therapist

Available Therapists

	Last Name	First Name	NPI
<input type="checkbox"/>	ABRAHAM	ALETHA	1316193725
<input type="checkbox"/>	ABRAMS	JACQUELIN	1003208976
<input type="checkbox"/>	ACKERMAN	GENE	1316438575
<input type="checkbox"/>	ADKINS	ABEL	
<input type="checkbox"/>	AHMED	RETA	1639581416
<input type="checkbox"/>	ALBRIGHT	TONJA	1093139891
<input type="checkbox"/>	ALLISON	ADRIAN	1275958043
<input type="checkbox"/>	ARIAS	ALEC	1326465626
<input type="checkbox"/>	ARROYO	KACIE	1215201017
<input type="checkbox"/>	ASHBY	ZENAIDA	1407018625
<input type="checkbox"/>	AVALOS	KRISTAL	1124200761
<input type="checkbox"/>	AVILA	ALI	1194088799
<input type="checkbox"/>	AVILES	ZULMA	1073060901
<input type="checkbox"/>	BALLARD	ISELA	1538473822
<input type="checkbox"/>	BARON	ERA	



Add Therapist(s)/Service Provider(s)



Matching Children

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”.

Unmatched Children

Add Child

Child Number	Last Name	First Name	MI	DOB	Gender	County	District	Address1	City	State	Zip	HomePhone				
C14000241462	LACY	IVORY		10/1/2019	m	ERIE	Cheektowaga-Sloan						Enrollments	Attempt Match	Edit	Delete
C40000198044	PEARCE	BERYL		11/15/2018	F	NIAGARA	NIAGARA FALLS CITY SD						Enrollments	Attempt Match	Edit	Delete
C40000190740	RANGEL	LANDON		2/23/2017	M	NIAGARA	NORTH TONAWANDA CITY SD						Enrollments	Attempt Match	Edit	Delete

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

Unmatched Enrollments

School Year All School Years

Retrieve

County	Child Number	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description				
NIAGARA	C40000139209	CROSS	PATSY	10/13/16	202021	07/06/20	08/14/20	CBRS	PNT	1x10 MONTHLY	Attendances			Delete
ERIE	C14000241462	LACY	IVORY	10/01/19	202324	09/01/23	06/30/24	RS	ST	2x30	Attendances	Attempt Child Match		Delete
NIAGARA	C40000161478	LUDWIG	LAUREEN	12/14/16	202021	07/06/20	08/14/20	CBRS	ST1	5x120	Attendances			Delete
NIAGARA	C40000103114	LUTZ	MICA	05/24/15	202021	07/06/20	08/14/20	CBRS	PNT	1x10 MONTHLY	Attendances			Delete

Matching Children

- * The top of the screen will show the unmatched information you entered for the child.
- * The bottom of the screen shows the potential County 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: Agency information ←

AYSON County: **Albany** District: **ALBANY CITY SD** DOB: **11/13/2020**

Potential Matches: County information ←

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		AYSON		11/13/2020	Albany	ALBANY CITY SD		ALBANY	NY		

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!”

Match Child Against County-Imported Child

Current Unmatched Child:

AYSON County: Albany District: ALBANY CITY SD DOB: 11/13/2020

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		AYSON		11/13/2020	Albany	ALBANY CITY SD		ALBANY NY			

Agency information

County information

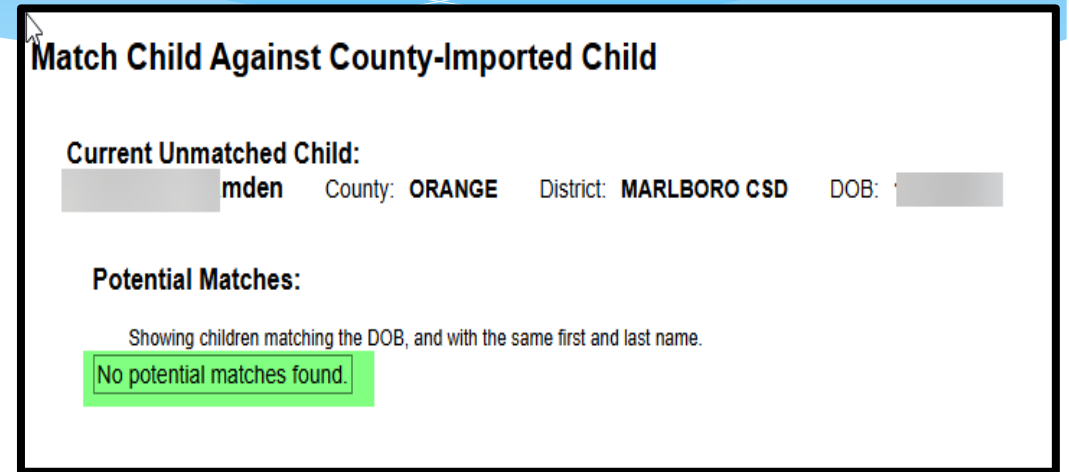
WARNING: By clicking the button below, you are combining these two children (including any associated data - not limited to: enrollments, attendances, medicaid consents, medicaid eligibility, IEPs, log notes, scripts/orders). Make sure the match is correct. This cannot be undone.

YSON (11/13/2020) → YSON (11/13/2020)

Match!

Matching Children

- * If you click on “Attempt Match”, and receive “No Potential Matches Found”:
 - * Either the County has not sent the child to Portal, or
 - * You have entered wrong information about the child.
 - * For example:
 - * The wrong Date of Birth
 - * The child has a hyphenated name, but the County doesn’t.
 - * The wrong school district.
- * You can go to **Reports -> Enrollments Uploaded County**, filter for County, School Year and Service Type (CB,CBRS,SEIT,RS).
 - * Look for the child in the list. Does the County name match what you entered? Is there a space or a hyphen?
 - * If you still cannot match the child, then contact the Help Desk at Support@CPSEPortal.com, and we can assist you.



Match Child Against County-Imported Child

Current Unmatched Child:
[Redacted]mden County: **ORANGE** District: **MARLBORO CSD** DOB: [Redacted]

Potential Matches:
Showing children matching the DOB, and with the same first and last name.
No potential matches found.



Matching Enrollments

View Unmatched Enrollments

- * Go to **Caseload Maintenance** → **View Unmatched Enrollments**.

Unmatched Enrollments												
Retrieve												
County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description			
ERIE	BLUM	MERIL	03/24/12	201516	04/06/16	06/30/16	RS	PT	1x30	Attendances	Attempt Child Match	Delete
ERIE	GARY	KELLY	01/30/11	201516	04/20/16	06/30/16	RS	OT	1x30	Attendances		Delete
ERIE	GERBER	MEGAN	02/17/12	201516	03/30/16	06/30/16	RS	ST	3x30	Attendances	Attempt Enrollment Match	Delete
ERIE	HOANG	JULES	03/24/11	201516	04/07/16	06/30/16	RS	ST	2x30	Attendances	Attempt Enrollment Match	Delete
ERIE	LACKEY	ISIAH	06/27/12	201516	03/30/16	06/30/16	RS	ST	3x30	Attendances	Attempt Enrollment Match	Delete



- * If the enrollment has potential matches (same child and service type), the “Attempt Enrollment Match” link will appear.

Matching Unmatched 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:

[Redacted]

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	[Redacted]

Matching Unmatched 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!”

Match Enrollment Against County-Imported Enrollment

Child: County: **SCHENECTADY** District: **BURNT HILLS-BALLSTON LAKE CSD** DOB: **11/3/2018**

Current Unmatched Enrollment:

Session: **2022 - 2023 Winter** From Date: **1/5/2023** 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	1/5/2023	6/22/2023	I	2x30	<input type="text"/>

WARNING: By clicking the button below, you are combining these two enrollments (including any associated data - not limited to: attendances, orders/scripts, log notes, therapist/provider assignments). Make sure the match is correct. This cannot be undone.

UNMATCHED ENROLLMENT
(1/5/2023 - 6/22/2023)
2x30 → CBRS2223W0025240
(1/5/2023 - 6/22/2023)
2x30

Match!



Reports

Enrollment and ESID # (Electronic Service ID Number)

- * 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".

Child Lookup

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

School Year County Provider District

Child Number STAC ID Electronic Service ID

Child Number	Last Name	First Name	DOB	CIN	District	County	Match Status	
C14000107823	ACEVEDO	CLAYTON	1/22/2015		Buffalo	ERIE	County Record	Details
C14000157818	ACEVEDO	CLAYTON	12/1/2016		Grand Island	ERIE	County Record	Details

Child Details (ACEVEDO, CLAYTON)

Child Number: C14000157818 CIN: STAC ID: I84516

DOB: 12/1/2016 Gender: M

Address: County: ERIE District: Grand Island Matched?: Y

, NY

[<< Back to Search Results](#)

View Information for School Year:

Status	School Year	From	To	ESID	Provider	Enrollment	CB Program	CB Type	Aide Frequency	Service	Frequency	Individual Or Group	Service Setting	
	2019 - 2020 Winter	5/12/2020	6/30/2020	RS1920W0105028	BUFFALO HEARING & SPEECH CENTER, INC	RS				ST	2x30	I		Attendances Details

Strikethrough = The county deleted this enrollment.

Enrollment Lookup Report

- * A report of all enrollments.
- * Go to **Lookup -> Enrollment Lookup**
- * You can also find the ESID # for each child on this report.

School Year Session

2019 - 2020 Winter

County

ERIE

Provider

BUFFALO HEARING & SPEECH CENTER, INC

☒CBRS

☒RS

☒SEIT

☒CB

Search

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	CB Rate Type	RS Type	Start	End	Frequency	Indiv / Grp	Service Setting	Program	CB Classroom	Aide/Nurse	Aide Frequency	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	CB1920W0045034	ACEVEDO	CLAYTON	1/22/2015	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Buffalo	CB			9/3/2019	6/24/2020	5 hrs/day			9100-I		N		35152.00	556.10	40	43		Attendances
	RS1920W0105028	ACEVEDO	CLAYTON	12/1/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Grand Island	RS		ST	5/12/2020	6/30/2020	2x30	I		9200-2				55.00	12.00	7	8	16	Attendances
	RS1920W0103951	ADAIR	QUINN	9/29/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Tonawanda City	RS		ST	1/2/2020	6/30/2020	2x30	I		9200-2				55.00	14.00	24	27	52	Attendances
	RS1920W0103952	ADAIR	QUINN	9/29/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Tonawanda City	RS		COR	1/2/2020	6/30/2020	1x30 MONTHLY	I		9200-2				55.00		24	27	6	Attendances
	CB1920W0046905	ADKINS	IRVING	12/31/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Frontier	CB			4/8/2020	6/24/2020	5 hrs/day			9100-I		N		10545.60	56.00	12	12		Attendances
	CBRS1920W0015129	ADKINS	IRVING	12/31/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Frontier	CBRS		ST	4/8/2020	6/24/2020	3x30	I		9100-I				0.00	6.00	12	12		Attendances

Excel

- * 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 [2019 - 2020 Winter] County [ERIE]
Provider [BUFFALO HEARING & SPEECH CENTER, INC]

☒ CBRS
☒ RS
☒ SEIT
☒ CB

[Search]

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	CB Rate Type	RS Type	Start	End	Frequency	Indiv / Grp	Service Setting	Program	CB Classroom	Aide/Nurse	Aide Frequency	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	CB1920W0045034	ACEVEDO	CLAYTON	1/22/2015	ERIE	BUFFALO HEARING & SPEECH CENTER, INC.	Buffalo	CB			9/3/2019	6/24/2020	5 hrs/day			9100-I		N		35152.00	556.10	40	43		Attendances
	RS1920W0105028	ACEVEDO	CLAYTON	12/1/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC.	Grand Island	RS		ST	5/12/2020	6/30/2020	2x30	I		9200-2				55.00	12.00	7	8	16	Attendances
	RS1920W0103951	ADAIR	QUINN	9/29/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC.	Tonawanda City	RS		ST	1/2/2020	6/30/2020	2x30	I		9200-2				55.00	14.00	24	27	52	Attendances
	RS1920W0103952	ADAIR	QUINN	9/29/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC.	Tonawanda City	RS		COR	1/2/2020	6/30/2020	1x30 MONTHLY	I		9200-2				55.00		24	27	6	Attendances
	CB1920W0046905	ADKINS	IRVING	12/31/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC.	Frontier	CB			4/8/2020	6/24/2020	5 hrs/day			9100-I		N		10545.60	56.00	12	12		Attendances
	CBRS1920W0015129	ADKINS	IRVING	12/31/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC.	Frontier	CBRS		ST	4/8/2020	6/24/2020	3x30	I		9100-I				0.00	6.00	12	12		Attendances

[Excel]

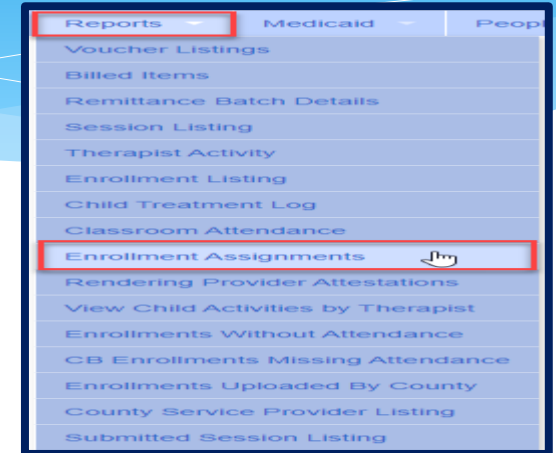
Enrollments Added by County Report

- * 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:	ERIE	Provider:	BUFFALO HEARING & SPEECH CENTER, INC	School Year Session:	2019 - 2020 Winter	<input checked="" type="checkbox"/> CB	<input checked="" type="checkbox"/> CBRS	<input checked="" type="checkbox"/> SEIT	<input checked="" type="checkbox"/> 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
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ACEVEDO, CLAYTON	201920 WIN	9/3/2019	6/24/2020	CB		CB1920W0045034	5 hrs/day	8/22/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ACEVEDO, CLAYTON	201920 WIN	5/12/2020	6/30/2020	RS	ST	RS1920W0105028	2x30	6/3/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ADAIR, QUINN	201920 WIN	1/2/2020	6/30/2020	RS	ST	RS1920W0103951	2x30	1/24/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ADAIR, QUINN	201920 WIN	1/2/2020	6/30/2020	RS	COR	RS1920W0103952	1x30 MONTHLY	1/24/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ADKINS, IRVING	201920 WIN	4/8/2020	6/24/2020	CB		CB1920W0046905	5 hrs/day	9/15/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ADKINS, IRVING	201920 WIN	4/8/2020	6/24/2020	CBRS	ST	CBRS1920W0015129	3x30	9/15/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	AGUIRRE, ADAM	201920 WIN	9/1/2019	5/13/2020	RS	ST	RS1920W0101769	2x30	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	AGUIRRE, ADAM	201920 WIN	9/1/2019	6/30/2020	RS	PT	RS1920W0101770	1x30	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	AGUIRRE, ADAM	201920 WIN	9/1/2019	5/13/2020	RS	COR	RS1920W0101771	1x30 MONTHLY	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	AHMAD, NORMAN	201920 WIN	9/3/2019	6/24/2020	CB		CB1920W0045049	5 hrs/day	8/23/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ALEXANDER, ADAN	201920 WIN	9/1/2019	6/30/2020	RS	OT	RS1920W0101776	2x30	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ALEXANDER, ADAN	201920 WIN	9/1/2019	6/30/2020	RS	PT	RS1920W0101777	1x30	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ALEXANDER, ADAN	201920 WIN	9/1/2019	6/30/2020	SEIT		SE1920W0012808	1x30	9/5/2019	Attendance	View
Export to Excel												

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: 2019 - 2020 Winter		Provider: BUFFALO HEARING & SPEECH CENTER, INC		<input checked="" type="checkbox"/> 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	
ADAIR	QUINN	RS1920W0103952	COR	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Tonawanda City	01/02/2020	06/30/2020	1x30 MONTHLY	I			Edit Assignment
ADKINS	IRVING	CBRS1920W0015129	ST	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Frontier	04/08/2020	06/24/2020	3x30	I			Edit Assignment
ALVARADO	AGUSTIN	RS1920W0108855	COR	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Ken/Ton	04/29/2020	06/30/2020	1x30 MONTHLY	I			Edit Assignment
ALVARADO	AGUSTIN	RS1920W0108854	ST	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Ken/Ton	04/29/2020	06/30/2020	2x30	I			Edit Assignment
AQUINO	REED	CBRS1920W0011994	PT	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Ken/Ton	04/08/2020	06/24/2020	2x30	I			Edit Assignment
AVALOS	LANCE	SE1920W0014359		BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Lancaster	06/09/2020	06/30/2020	4x30	I			Edit Assignment
BENEDICT	JULISSA	RS1920W0104810	ST	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Gowanda	04/22/2020	06/30/2020	1x30	I			Edit Assignment
BERMUDEZ	LEOLA	CBRS1920W0014830	ST	BUFFALO HEARING & SPEECH CENTER, INC	NIAGARA	LOCKPORT CITY SD	03/16/2020	06/24/2020	2x30	I			Edit Assignment
BERMUDEZ	LEOLA	CBRS1920W0014831	OT	BUFFALO HEARING & SPEECH CENTER, INC	NIAGARA	LOCKPORT CITY SD	03/16/2020	06/24/2020	2x30	I			Edit Assignment



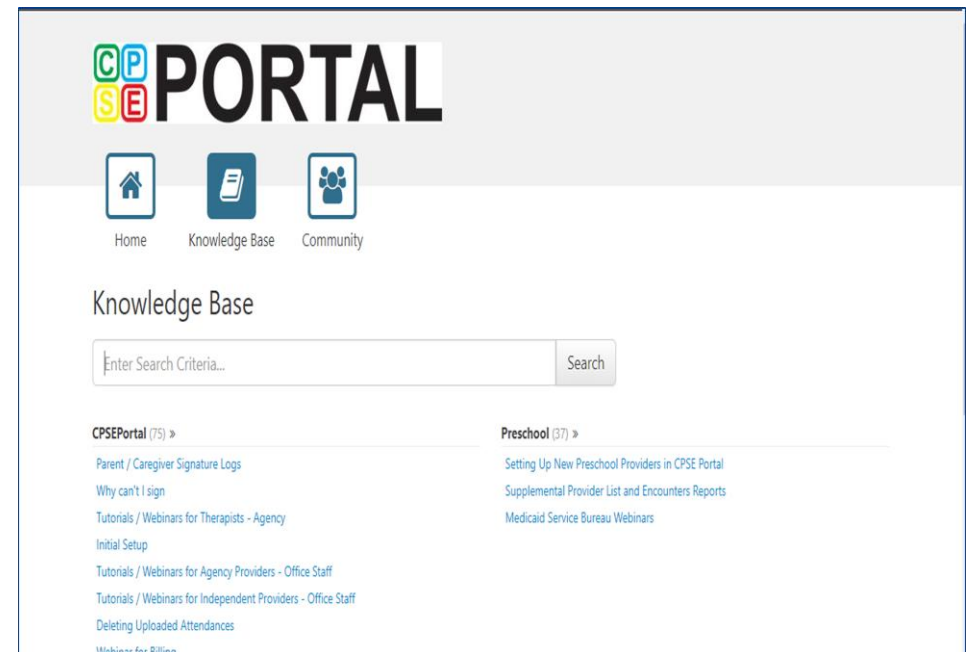
Closing

Important Reminder

- * 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>
- * 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>

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