

# CPSE Portal Agency Case Management

May 19, 2025

## Questions & Answers

Topic/Category	
<b>Q</b>	You must match unmatched children and their unmatched enrollments separately, two steps, not 1?
<b>A</b>	<b>YES.</b> You will match the Unmatched Child first, and then match all of the Unmatched Enrollments.
<b>Q</b>	Do you need match the to and from dates that you entered to the County enrollment dates? What if they do now match?
<b>A</b>	<b>YES.</b> You will review your IEP to check the dates on the IEP to your entry. If the district entered the dates wrong, and they do not match the IEP, contact the district and do not match. If you entered the dates wrong, then you will go to <b>Caseload Maintenance -&gt; Add/Edit Unmatched Enrollments</b> , and Edit the unmatched enrollment and change the dates to match the IEP.
<b>Q</b>	Do you have to wait for the therapist to add all notes and bill before you remove the therapist if we assigning a new therapist?
<b>A</b>	Before removing a therapist, you will want to ensure that all notes are entered, signed and billed. If there are any issues after you remove the therapist, then you will need to add the therapist back to the child's enrollment so the therapist can correct notes.
<b>Q</b>	Can you have two therapist servicing same student?
<b>A</b>	<b>YES.</b> You can assign as many therapists as needed to one child. You may also want to assign the supervisor if there is one. This will allow the supervisor to enter any session notes if needed.
<b>Q</b>	Can you still bill the county with an unmatched enrollment?
<b>A</b>	<b>NO.</b> You cannot bill the county on an unmatched child or unmatched enrollment.
<b>Q</b>	How does the county know who your children are?
<b>A</b>	The County will pull in the information that the school district entered in eSTACs to their Preschool system. The County will then send the child and enrollments to the Portal under your agency.
<b>Q</b>	If you are an admin in the agency and a service provider, do you need separate logins?
<b>A</b>	<b>NO.</b> Under the <b>People -&gt; Users</b> , you will need to make sure that your name is checked off as a service provider & a billing admin.

<b>Q</b>	When will our children be visible in the portal?
<b>A</b>	As the school districts are entering children, and submitting STAC's, the county is uploading those students and services into the Portal. This process has already started.
<b>Q</b>	If one or more therapist's are assigned to the child, how do you assign 1x30 to one therapist and 1x30 to the other? Are they both assigned to the 2x30 enrollment?
<b>A</b>	If the enrollment is for 2x30, and you have one therapist seeing the child for 1x30, and another therapist seeing the child for the other 1x30, both therapists will be assigned to the 2x30 enrollment. The therapists will work out their schedule with each other as to what day they will service the child.
<b>Q</b>	How much time do we wait in July before creating an unmatched child?
<b>A</b>	If the child is not assigned to your agency by the end of June, you should contact the district first to see when the entry work will be completed their end. If the child and services are not in the Portal when the school year starts, you will then need to create the unmatched child, the unmatched enrollment and assign the therapist. Check for a completed IEP before creating unmatched enrollments.