Tabs Covered In Webinar

Support@CPSEPortal.com

What are **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

* 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 #..

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My Caseload

My Caseload

* Go to *Caseload Maintenance -> My Caseload*

    * You can also see all of the attendances that you have entered for each child.

    * You will also see the ESID # of your students.
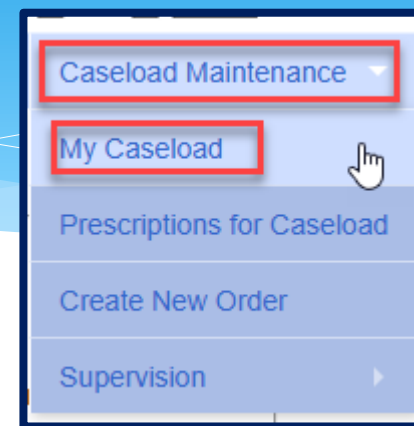
My Caseload

Filter By

Provider: [   ] Session: [2024 - 2025 Summer] [Search]

	Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned			
☐		RS2425S0105531		ADA	ONONDAGA		LIVERPOOL CSD	RS	07/01/24	08/30/24	AUD 1x30 Individual		Attendances	Service Confirmation Logs	Defaults
☐		RS2425S0101428		HENRY	ONONDAGA		NORTH SYRACUSE CSD	RS	07/02/24	08/12/24	AUD 1x30 MONTHLY Individual		Attendances	Service Confirmation Logs	Defaults
☐		RS2425S0102360		JADIS	ONONDAGA		SYRACUSE CITY SD	RS	07/08/24	08/16/24	AUD 1x30 MONTHLY Individual		Attendances	Service Confirmation Logs	Defaults
☐		RS2425S0101441		DOMINIC	ONONDAGA		NORTH SYRACUSE CSD	RS	07/08/24	08/16/24	AUD 1x30 MONTHLY Individual		Attendances	Service Confirmation Logs	Defaults
☐		RS2425S0102915		CELINE	ONONDAGA		WESTHILL CSD	RS	07/01/24	08/30/24	AUD 1x30 MONTHLY Individual		Attendances	Service Confirmation Logs	Defaults
☐		RS2425S0102917		CELINE	ONONDAGA		WESTHILL CSD	RS	07/01/24	08/30/24	TDF 3x30 MONTHLY Individual		Attendances	Service Confirmation Logs	Defaults

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

Prescriptions

For SLP's ONLY

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*
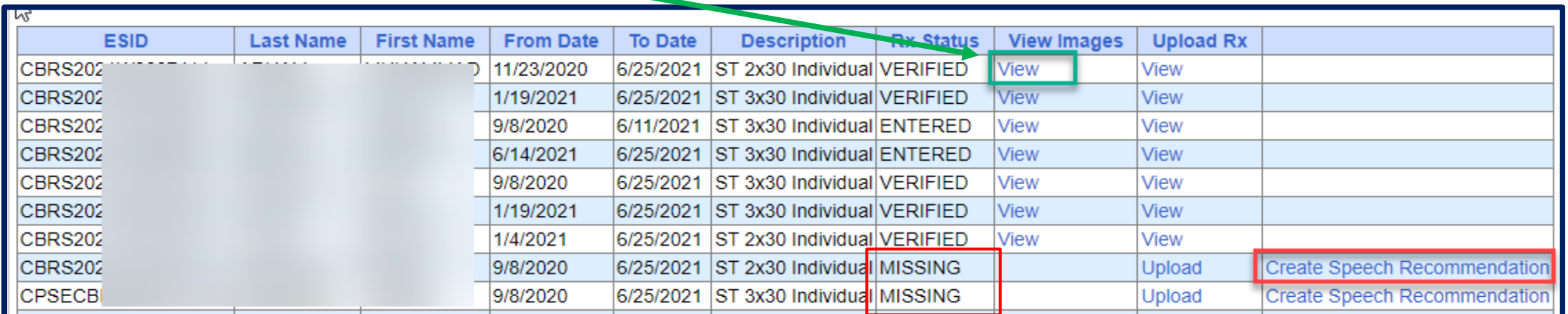 * Use this option for subsequent prescriptions:
    * Example: when there is a change in service and a previous prescription already exists.

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

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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.

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	View Images	Upload Rx	
CBRS202			11/23/2020	6/25/2021	ST 2x30 Individual	VERIFIED	View	View	
CBRS202			1/19/2021	6/25/2021	ST 3x30 Individual	VERIFIED	View	View	
CBRS202			9/8/2020	6/11/2021	ST 3x30 Individual	ENTERED	View	View	
CBRS202			6/14/2021	6/25/2021	ST 3x30 Individual	ENTERED	View	View	
CBRS202			9/8/2020	6/25/2021	ST 3x30 Individual	VERIFIED	View	View	
CBRS202			1/19/2021	6/25/2021	ST 3x30 Individual	VERIFIED	View	View	
CBRS202			1/4/2021	6/25/2021	ST 2x30 Individual	VERIFIED	View	View	
CBRS202			9/8/2020	6/25/2021	ST 2x30 Individual	MISSING		Upload	Create Speech Recommendation
CPSECB			9/8/2020	6/25/2021	ST 3x30 Individual	MISSING		Upload	Create Speech Recommendation

Create Digital Order

* Once you click on "Create Speech Recommendation", the Create Digital Order screen will populate.

    1. Choose the effective date range,

    2. Enter one or more ICD code(s),

    3. Enter the frequency, duration, time period & I or G,

    4. Click "*Preview and Sign*",

    5. Review Speech Recommendation for Services,

    6. Digitally Sign,

    7. Enter PIN and click "*I Agree*".

Create Digital Order

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Create New Order for Subsequent Digital Orders

* 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 #.

Closing

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*
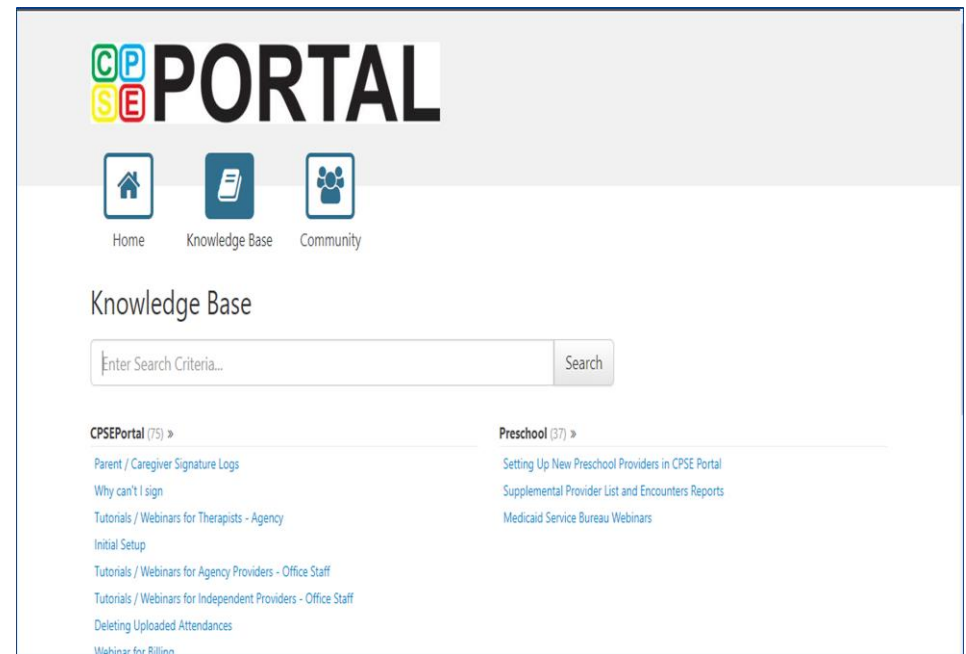
Knowledge Base Links

* Creating Digital Speech Recommendations (SLPs):

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

Upcoming Webinars

CPSE Portal Session Notes:

Target Audience: Everyone

Registration Information:

    Monday, June 9, 2025 @ 9:30AM

        https://attendee.gotowebinar.com/register/1283496650236395616

    Monday, June 9, 2025 @ 4:00PM

        https://attendee.gotowebinar.com/register/7274624459313421150

Topics:

Recap Entering/Signing Classroom Attendance

Attendance Entry Record

Signing Attendance/Review & Sign

Co-Signing Session Notes/Attendance

Un-signing Attendance/Making Corrections After Signing

Move Attendances Between Enrollments

Print Child Treatment Log

Print Parent Signature Log

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