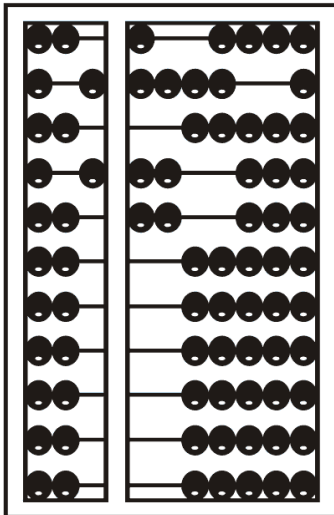
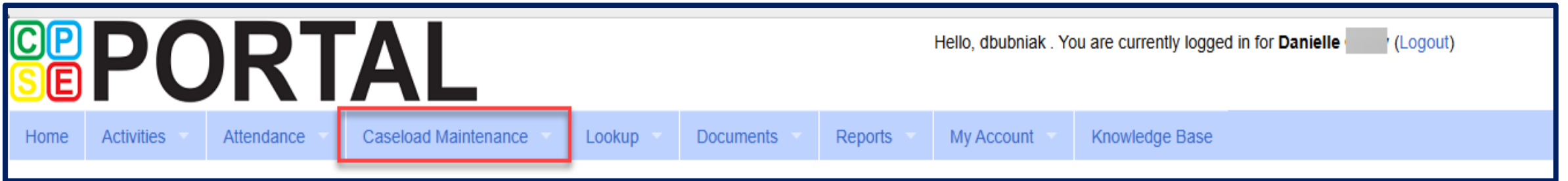


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



CPSE Portal Case Management for Agency Service Providers

Tabs Covered In Webinar





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

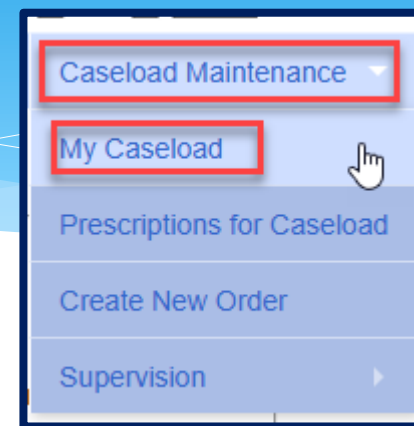
- * The enrollment should correspond to a unique approved service on the IEP.
- * There will be enrollments for:
 - * Different Service Types (OT vs PT vs ST)
 - * Different frequencies (1x30 vs 1x45 vs 2x30)
 - * Individual vs Group (if the CPSE determines a child should receive some individual and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



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

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

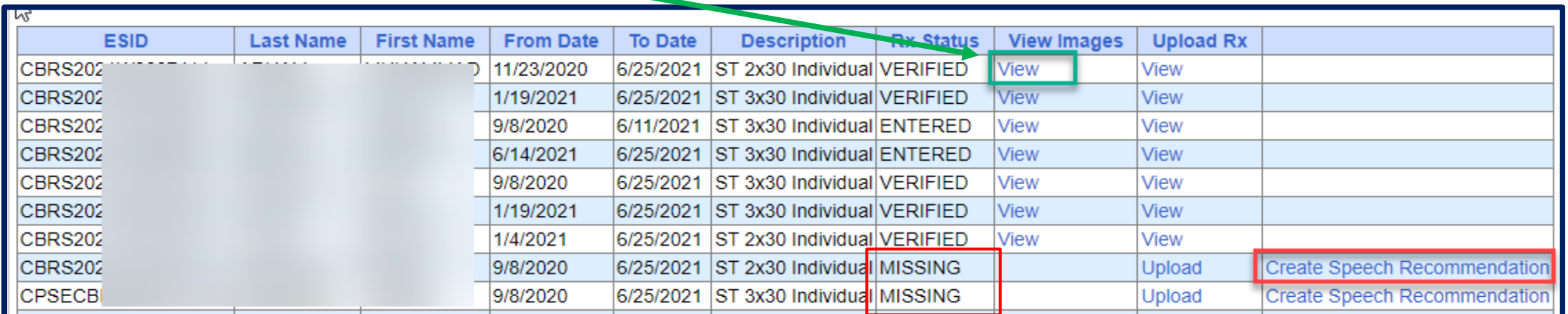
- * Example: when there is a change in service and a previous prescription already exists.

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



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

Create Digital Order

Child Lookup
ANNABELLE County: SCHENECTADY District: SCHALMONT CSD DOB: 11/4/2020 [Redo Search](#)

Create recommendation for Speech Services
BETTY
Prescription effective date range
☒ Applies to entire school year 2024 - 2025
☐ Applies to specific school year / session 2024 - 2025 Winter
☐ Applies to specific date range
Reason for Services
ICD
F80.1
Reason
Frequency
☒ Specific Frequency
Frequency: 3 Duration: 30 Weekly
☐ Per the IEP
[Preview and Sign](#)

Entire SY 7/1 - 6/30
Summer or winter
Specific date range usually used
for children on a calendar year

Speech Recommendation for Services

A Speech and Language referral for services is recommended in accordance with the request by the Committee on Preschool Special Education. Services, when provided, will be in accordance with the Individualized Education Program designed by the Committee.

Name: ANNABELLE
DOB: 11/4/2020
Provider: BETTY
District: SCHALMONT CSD
County: SCHENECTADY
Period Covered: 7/1/2024 To 6/30/2025
Frequency: 3.00x30 Weekly(I)

Reason for Services
ICD Code(s)

ICD Code	ICD Description
F80.1	Expressive language disorder

Provider Contact Information
Name: BETTY
Phone Number: 518-111-1111
Address 1: 123 Main Street
Address 2:
City: Schenectady State: NY Zip: 12305
Licensed Speech and Language Pathologist Information
Name: Betty
NPI: 1508017
License: 002
Digital Signature
Signature: Betty Speech Pathologist, CCC-SLP Date: 5/20/2025
[Digitally Sign](#)

By entering my pin I am signing this recommendation for speech services

Signature: Betty Speech Pathologist, CCC-SLP
NPI: 1508017
Date: 5/20/2025
Pin:
[I agree.](#)

Create New Order for Subsequent Digital Orders

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

Create Digital Order

Child Lookup

Name (Last,First)a

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	
Select	C28000251			9/3/2019		EAST MEADOW UFSD	NASSAU	County Record	Details
Select	C28000240			7/16/2019		UNIONDALE UFSD	NASSAU	County Record	Details

Create Digital Order

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

Create Digital Order

Child Lookup
ANNABELLE County: SCHENECTADY District: SCHALMONT CSD DOB: 11/4/2020 [Redo Search](#)

Create recommendation for Speech Services
R,BETTY

Prescription effective date range
☒ Applies to entire school year 2024 - 2025
☐ Applies to specific school year / session 2024 - 2025 Winter
☐ Applies to specific date range

Reason for Services
ICD
F80.1
Reason

Frequency
☒ Specific Frequency
Frequency: 3 Duration: 30 Weekly 1
☐ Per the IEP

[Preview and Sign](#)

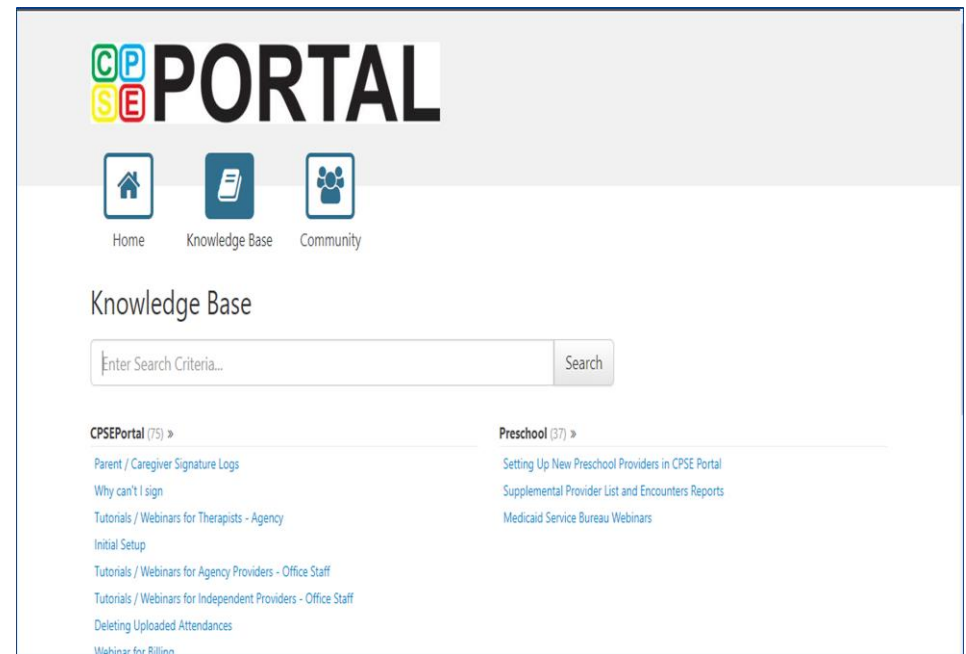
Entire SY 7/1 - 6/30
Summer or winter
Specific date range usually used for children on a calendar year



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