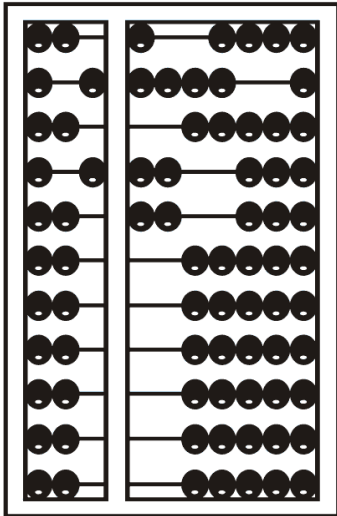


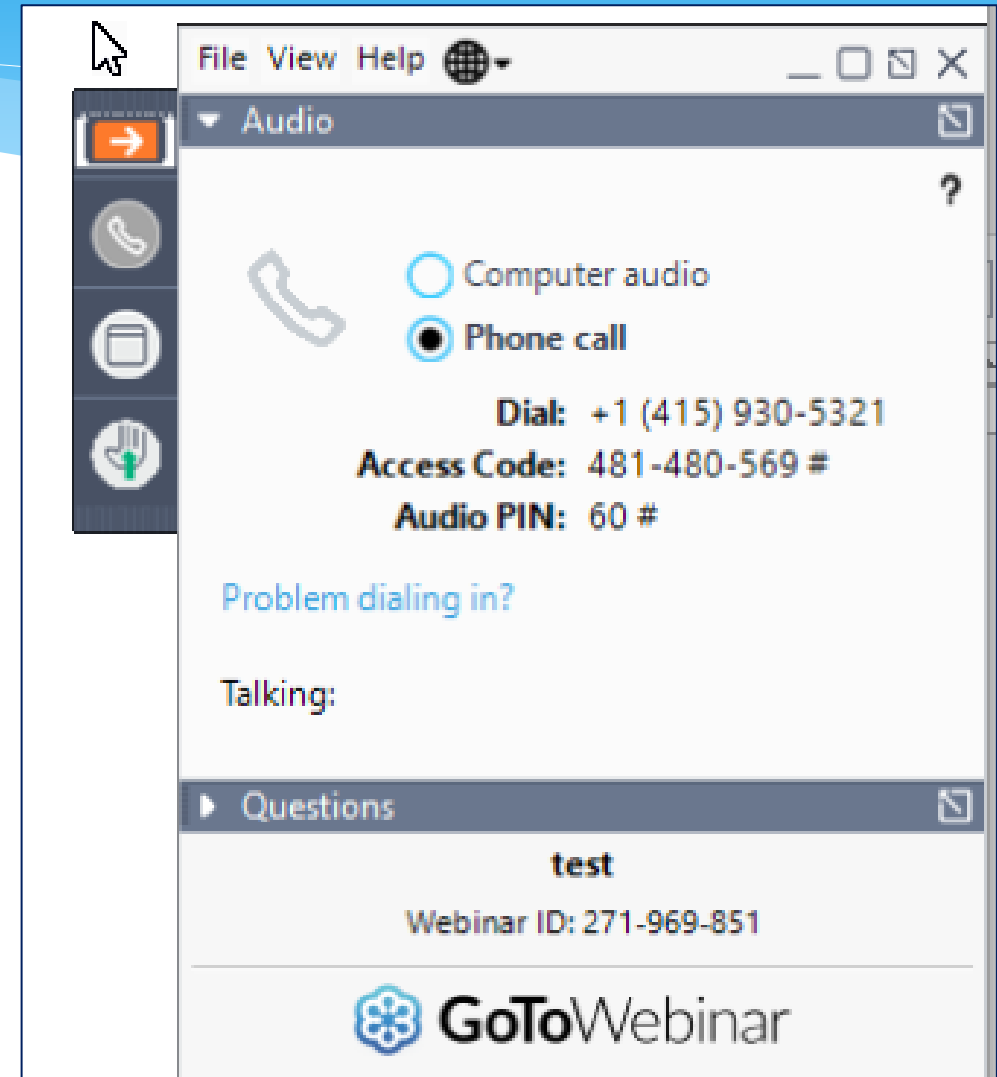
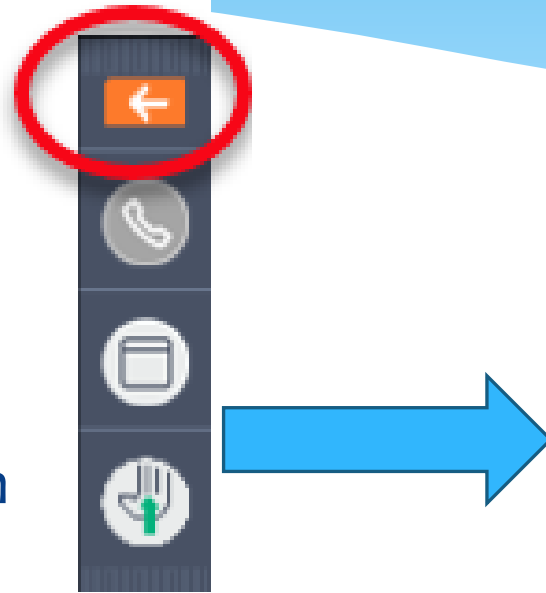
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# Using Go To Webinar

# Go To Webinar Control Panel

- \* Control panel is on far right of screen
- \* Orange button with white arrow expands and shrinks control panel

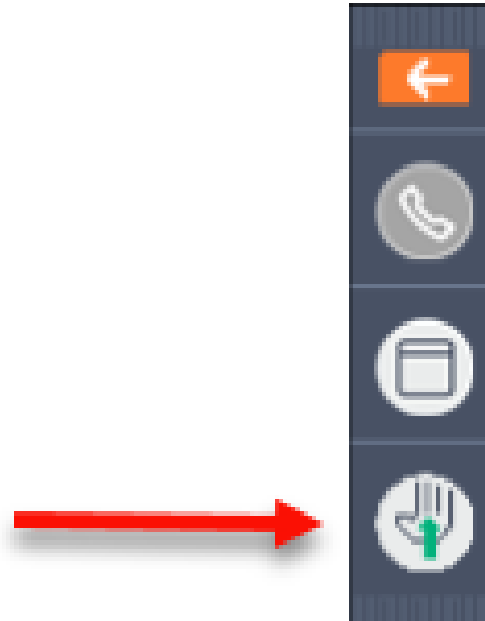


# Communicating with Presenter

- \* All participants are on mute.
- \* Two ways to communicate with us:
  - \* 1-Raise your hand
  - \* 2-Type in a question
- \* You can raise your hand in response to a question we ask. Do not raise your hand to ask a question.
- \* You can type in question in the question box.

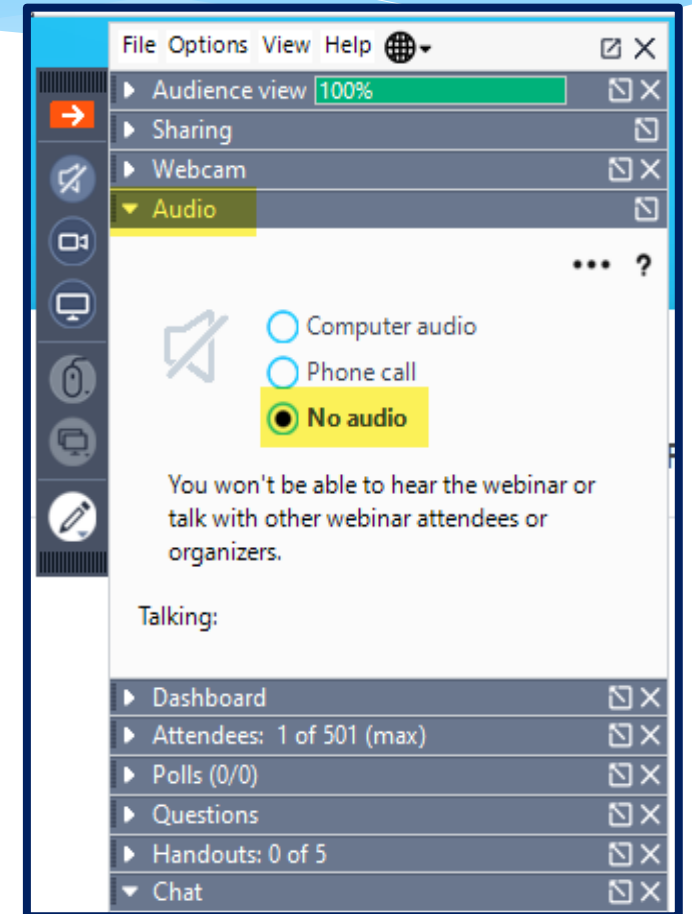
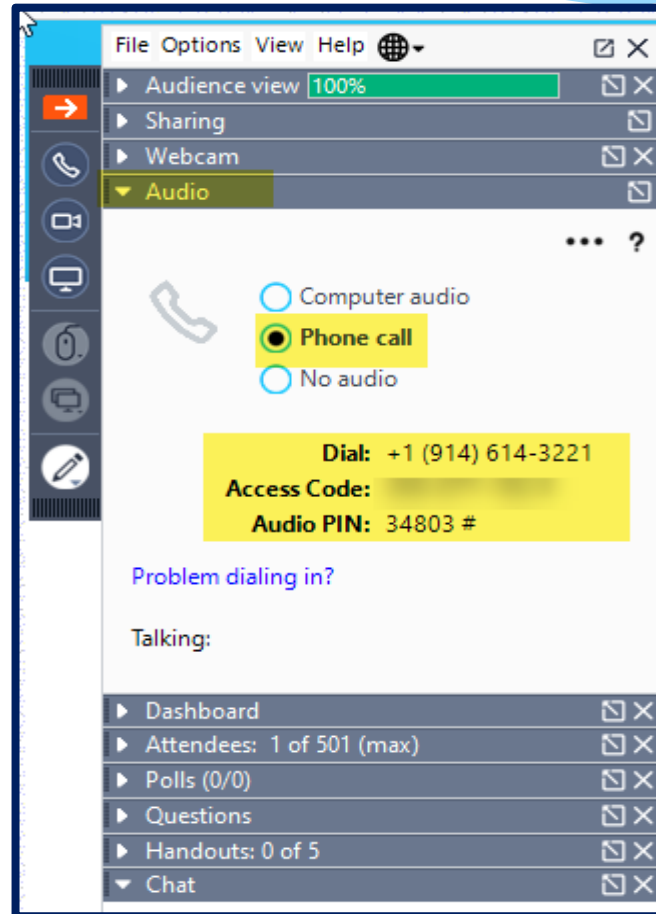
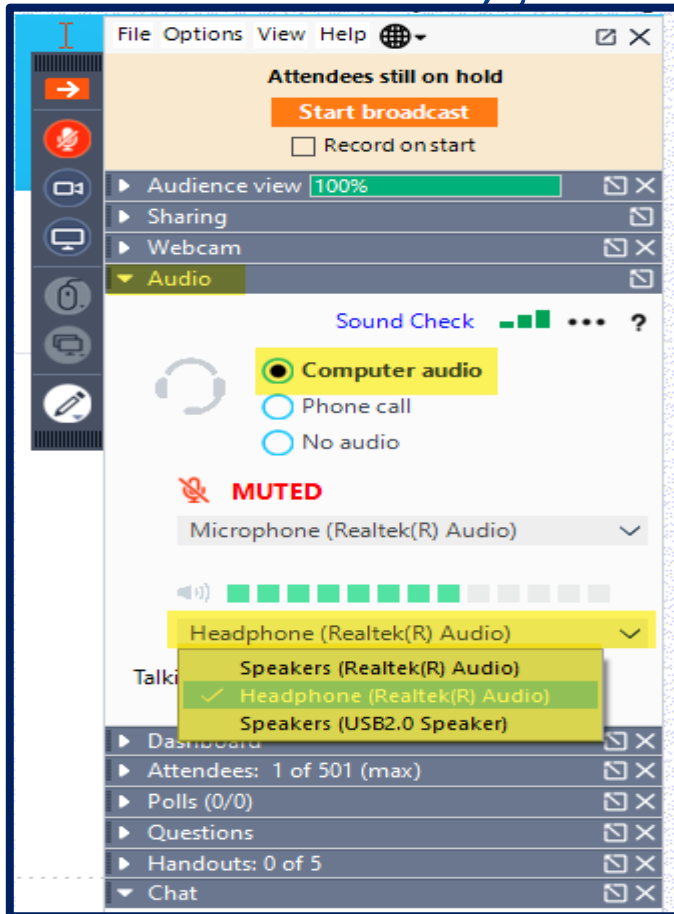
# Raising your hand

- \* On bottom left of control panel is a button with a hand icon
- \* Click that button to raise your hand



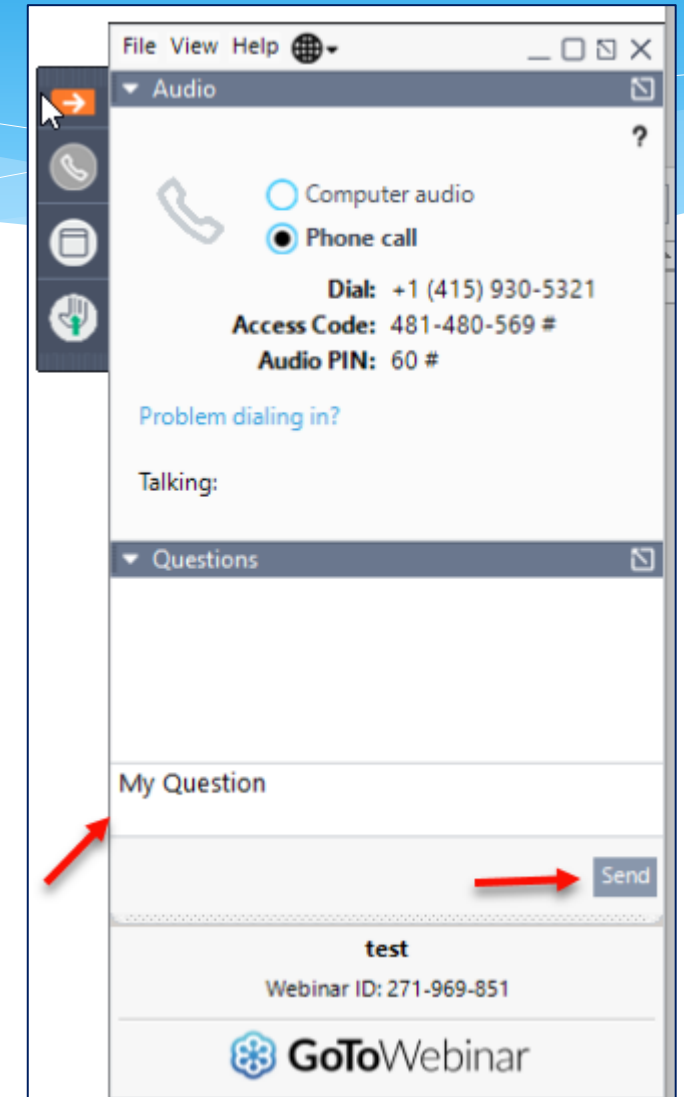
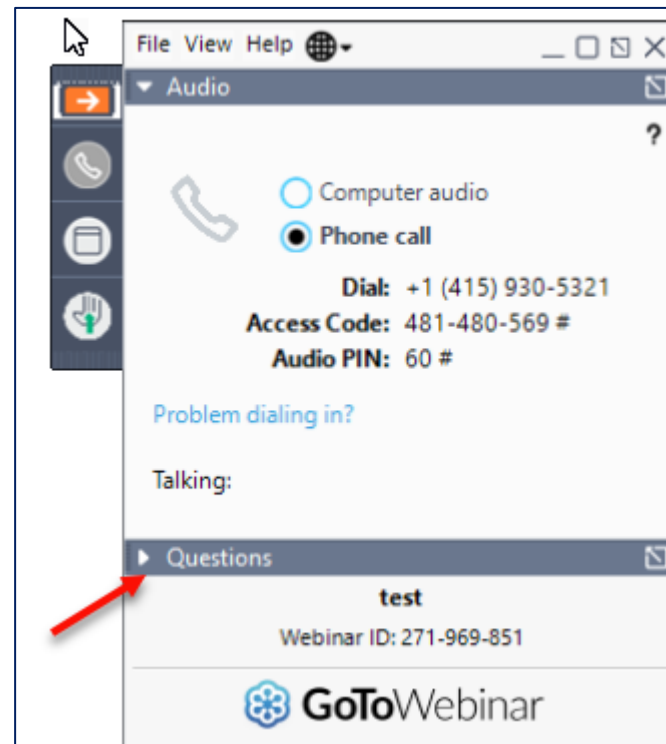
# Can't Hear the Webinar?

\* Under the Audio tab, you can choose Computer Audio, Phone Call or No Audio. If you choose No Audio, you will not be able to hear the webinar!



# Typing in a Question

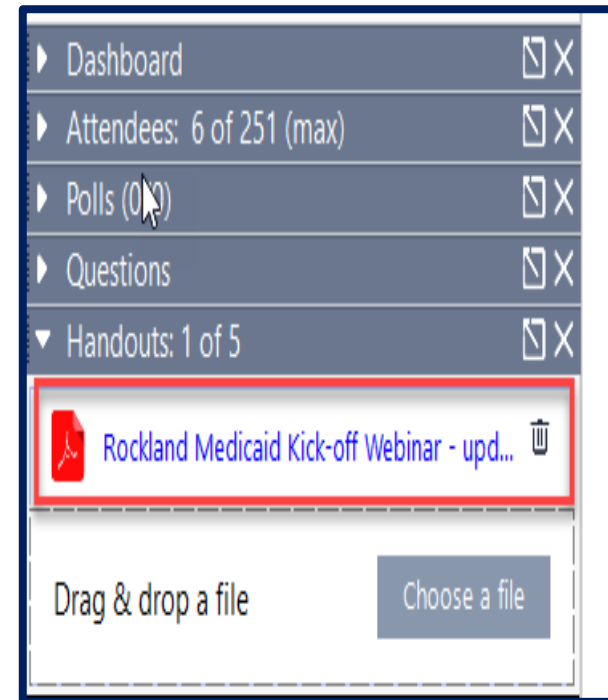
- \* Click the question bar to expand questions section
- \* Type in your question and click send



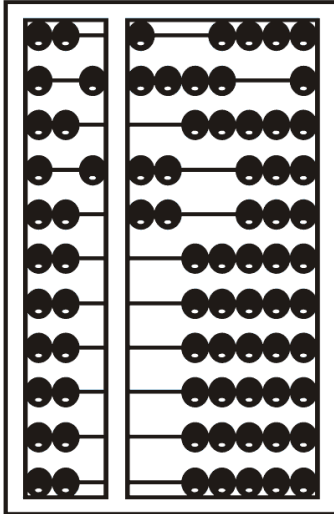
# Handouts

## If you would like to download the handout:

- \* Click the “Handouts” icon on the control panel.
- \* Click the link for the handout that you would like to download.



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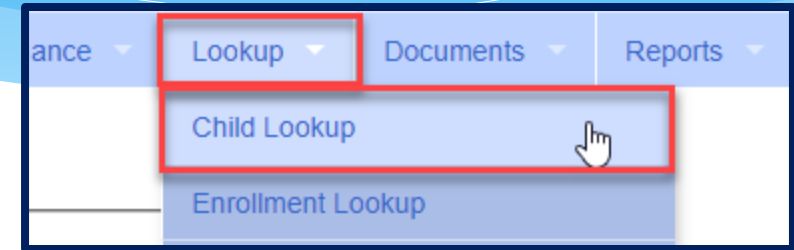
# CPSE Portal CB Agency Case Management



# 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**

Last Name   [Show Advanced Search options]

Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	Details
SCHAFFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	<a href="#">Details</a>
SCHAFFER	LATRICIA	5/12/2011	F35053	Iroquois	ERIE	County Record	<a href="#">Details</a>
SCHMITT	FREDDIE	3/1/2012	G04529	Orchard Park	ERIE	County Record	<a href="#">Details</a>
SCHULZ	FREDERIC	3/3/2011		Buffalo	ERIE	County Record	<a href="#">Details</a>
SCHULZ	JONNIE	12/5/2009	E34929	Orchard Park	ERIE	County Record	<a href="#">Details</a>
SCHUSTER	JACQUELINE	1/28/2011	F67096	Buffalo	ERIE	County Record	<a href="#">Details</a>
SCHUSTER	MARGARITE	3/30/2012	F67281	Buffalo	ERIE	County Record	<a href="#">Details</a>

# Child Lookup Advanced Search

- \* Click “Show Advanced Search options” to see additional search criteria:

**Child Lookup**

Name (Last,First)

- \* School Year
- \* County
- \* Provider
- \* District
- \* STAC ID #
- \* Electronic Service ID #

**Child Lookup**

Name (Last,First)

School Year  County  Provider  District

Child Number  STAC ID  Electronic Service ID  Medicaid CIN



# 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, an agency can create a temporary child and temporary enrollment records.
  - \* These are created when the County 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 #.

# 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)

**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

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	<a href="#">Edit</a>	<a href="#">Delete</a>

- \* 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	<input type="text"/>	<input type="text" value="Nolan"/>		<input type="text" value="12/7/2018"/>		<input type="text" value="KINGSTON CITY SD"/>					<input type="text"/>	Enrollments	Attempt Match	<a href="#">Update</a>	<a href="#">Cancel</a>

# 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 an Unmatched Enrollment (Center Based, Related Service & SEIT)

\* Go to **Caseload Maintenance -> Add/Edit Unmatched Enrollments**

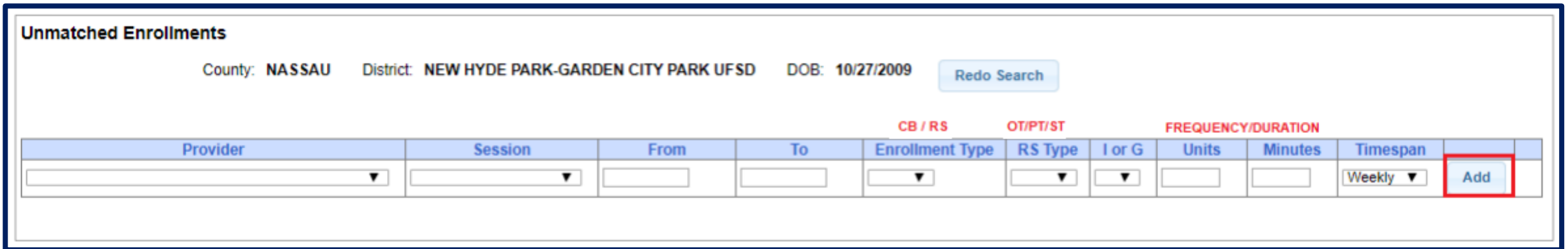
\* Search child's name, and click "Select"



\* 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"



Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan	
<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"/>	Weekly	<input type="button" value="Add"/>

# Adding an Unmatched Enrollment (Center Based Related Service)

- \* After you create the CB unmatched enrollment, now click on “Add CBRS” to add all of the CBRS unmatched enrollments.
- \* **REMEMBER** – all of your unmatched CBRS enrollments will need to be under the unmatched CB enrollment.

AMBROSE, FREDRIC County: ULSTER District: HIGHLAND CSD DOB: 4/16/2017 [Redo Search](#)

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan			
LEARNING TOGETHER, INC.	2023 - 2024 Winter	9/5/2023	6/21/2024	CB		G	5.00	300	Weekly	<a href="#">Edit</a>	<a href="#">Attempt Match</a>	<a href="#">Add CBRS</a> <a href="#">Delete</a>
<input type="text" value="LEARNING TOGETHER, INC. v"/>	<input type="text" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Weekly v"/>	<a href="#">Add</a>		

# Adding an Unmatched Enrollment (Center Based Related Service)

- \* This will show the unmatched CB enrollment at the top, and all of the CBRS unmatched enrollments will be added at the bottom.

**CB Enrollments** **Unmatched CB Enrollment for Fredric Ambrose**

Session  Provider  County  Last Name  First Name  DOB

County	District	Last Name	First Name	ElectronicServiceID	Provider	Program	Start Date	End Date	
ULSTER	HIGHLAND CSD	AMBROSE	FREDRIC		LEARNING TOGETHER, INC.	-G	09/05/2023	06/21/2024	Select

Showing top 25 results...

**Included Services for AMBROSE, FREDRIC** **Enter the CBRS Unmatched Enrollments(s) for Fredric Ambrose**

ElectronicServiceID	From	To	RS Type	I or G	Units	Minutes	Timespan	
CPSECBRS0000124607	9/5/2023	6/21/2024	PT	I	2.00	30	WEEKLY	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
	<input type="text" value="9/5/2023"/>	<input type="text" value="6/21/2024"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WEEKLY <input type="text"/>	<input type="button" value="Add"/>

# Adding an Unmatched Enrollment (For Center Based Related Services **ONLY**)

- \* After the Unmatched CB Enrollment has been created, you can also create the CBRS by going to **Caseload Maintenance -> CBRS Enrollments**.
- \* Complete all of the information needed to search:
  - \* Session, County, Last Name, First Name & DOB and search.



**CB Enrollments**

Session  Provider  County  Last Name  First Name  DOB

A screenshot of a search form titled 'CB Enrollments'. The form contains several input fields: 'Session' (a dropdown menu), 'Provider' (a dropdown menu), 'County' (a dropdown menu), 'Last Name' (a text box), 'First Name' (a text box), and 'DOB' (a text box). To the right of these fields are two buttons: 'Search' (highlighted with a red box) and 'Clear'. Red arrows point upwards to each of the six input fields.

# Adding an Unmatched Enrollment (For Center Based Related Services)

## CB Enrollments

### Unmatched CB Enrollment for Fredric Ambrose

Session  Provider  County  Last Name  First Name  DOB

Search

Clear

County	District	Last Name	First Name	ElectronicServiceID	Provider	Program	Start Date	End Date	
ULSTER	HIGHLAND CSD	AMBROSE	FREDRIC		LEARNING TOGETHER, INC.	-G	09/05/2023	06/21/2024	Select

Showing top 25 results...

## Included Services for AMBROSE, FREDRIC

### Enter the CBRS Unmatched Enrollments(s) for Fredric Ambrose

ElectronicServiceID	From	To	RS Type	I or G	Units	Minutes	Timespan	
CPSECBRS0000124607	9/5/2023	6/21/2024	PT	I	2.00	30	WEEKLY	Edit Delete
	<input type="text" value="9/5/2023"/>	<input type="text" value="6/21/2024"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WEEKLY <input type="text"/>	Add

# Completed Unmatched Enrollment for Center Based and Center Based Related Services

## CB Enrollments

### Unmatched CB Enrollment for Fredric Ambrose

Session  Provider  County  Last Name  First Name  DOB

County	District	Last Name	First Name	ElectronicServiceID	Provider	Program	Start Date	End Date	
ULSTER	HIGHLAND CSD	AMBROSE	FREDRIC		LEARNING TOGETHER, INC.	-G	09/05/2023	06/21/2024	Select

Showing top 25 results...

## Included Services for AMBROSE, FREDRIC

### Completed Unmatched CBRS Enrollment(s) for Fredric Ambrose

ElectronicServiceID	From	To	RS Type	I or G	Units	Minutes	Timespan		
CPSECBRS0000124607	9/5/2023	6/21/2024	PT	I	2.00	30	WEEKLY	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CPSECBRS0000124608	9/5/2023	6/21/2024	OT1	G	1.00	30	WEEKLY	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CPSECBRS0000124609	9/5/2023	6/21/2024	ST	I	4.00	45	WEEKLY	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CPSECBRS0000124610	9/5/2023	6/21/2024	PNT	I	1.00	30	MONTHLY	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
	<input type="text" value="9/5/2023"/>	<input type="text" value="6/21/2024"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WEEKLY <input type="text"/>	<input type="button" value="Add"/>	



# Assigning Therapist to Children

# Assigning Enrollments to Therapist (Assign multiple children to one therapist)

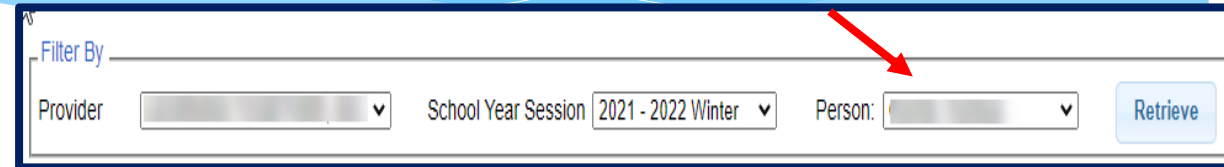
\* Go to **Caseload Maintenance -> Caseload**

\* Select therapist under “Person” dropdown and click “Retrieve”. This will bring up the therapist’s caseload.

\* Click “Add New Assignment”.

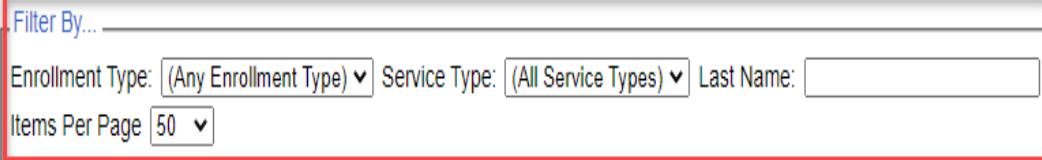
Add New Assignment

\* Filter by Enrollment Type, Service Type, or Last Name and click “Retrieve” to bring up any enrollments that fit the filter description.



Filter By  
Provider  School Year Session 2021 - 2022 Winter Person:  Retrieve

Assign Cases To Carissa  for the 202122 WIN session



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

Retrieve

Assign Selected to Carissa

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: ST Last Name:

Items Per Page 50

Assign Selected to BRANDON KELLY Return to Caseload

	Status	Last Name	First Name	ESID	From	To	Enrollment Type	RS Type	Freq	I/G	Provider	County	District	
<input type="checkbox"/>	UNMATCHED	ALDRICH	PORFIRIO		9/9/2019	6/26/2020	RS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALI	ADOLFO	CBRS1920W0000468	9/9/2019	10/14/2019	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALI	ADOLFO	CBRS1920W0000473	10/15/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input type="checkbox"/>		ALLEN	ADOLPH	CBRS1920W0000355	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALLISON	ADRIAN	CBRS1920W0000382	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Beacon	Attendance
<input type="checkbox"/>		ALLRED	KORY	CBRS1920W0000447	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALVARADO	AGUSTIN	CBRS1920W0000257	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Beacon	Attendance
<input checked="" type="checkbox"/>		AMBROSE	FREDRIC	CBRS1920W0000200	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Poughkeepsie	Attendance
<input type="checkbox"/>		ANAYA	DINO	CBRS1920W0000176	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Beacon	Attendance
<input type="checkbox"/>		ANDERSON	AL	CBRS1920W0000161	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Arlington	Attendance
<input checked="" type="checkbox"/>		ANDRADE	ALAN	CBRS1920W0000571	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Poughkeepsie	Attendance
<input type="checkbox"/>		ANDREWS	WANDA	CBRS1920W0000561	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input type="checkbox"/>		ANTHONY	ALBERTO	CBRS1920W0000391	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Arlington	Attendance
<input checked="" type="checkbox"/>		ARCHER	ALDEN	CBRS1920W0000128	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Arlington	Attendance
<input type="checkbox"/>		ARIAS	EARNESTINE	RS1920W0023296	10/7/2019	6/26/2020	RS	ST	2.00x 30 WEEKLY	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Poughkeepsie	Attendance

# Assigning Children to Therapist (Assign one child to one therapist)

- \* Go to **Caseload Maintenance -> Assign Child's Therapist(s) and Service Provider(s)**.
- \* Search for child, and then click "Select".

	Child Number	Last Name	First Name	DOB	CIN	District	County
Select	62000182949			2/14/2018		KINGSTON CITY SD	ULSTER

- \* This will bring up all of the enrollments for the child.
- \* Now "Select" the enrollment.

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	CB2122W0009636	CB		5 hrs/day	1/3/2022	6/24/2022		
Select	CB2122W0009637	CB		5 hrs/day	1/3/2022	6/24/2022		
Select	CB2122W0009637	CB		5 hrs/day	1/3/2022	6/24/2022		
Select	CBRS2122W0036065	CBRS	PSY	1x30	1/3/2022	6/24/2022	I	
Select	CBRS2122W0036073	CBRS	OT1	1x30	1/31/2022	6/24/2022	G	
Select	CBRS2122W0036101	CBRS	OT	1x30	1/31/2022	6/24/2022	I	

# Assigning Children to Therapist

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

Select	CBRS2122S0035244	CBRS	OT	2x30	7/5/2021	8/13/2021	I	
Select	CBRS2122S0035245	CBRS	PSY	1x30	7/5/2021	8/13/2021	I	
Select	CBRS2122S0035245	CBRS	PSY	1x30	7/5/2021	8/13/2021	I	

Assigned Therapists			
	Last Name	First Name	NPI
<input type="checkbox"/>		Jessica	

Available Therapists			
	Last Name	First Name	NPI
<input type="checkbox"/>		Davis	
<input type="checkbox"/>		Christine	
<input type="checkbox"/>		Christina	
<input type="checkbox"/>		Destiny	
<input type="checkbox"/>		Madison	
<input type="checkbox"/>		Carissa	
<input type="checkbox"/>		Susana	
<input type="checkbox"/>		Celeste	
<input type="checkbox"/>		Kristen	
<input type="checkbox"/>		Heather	
<input type="checkbox"/>		Caleigh	
<input type="checkbox"/>		Jessica	
<input type="checkbox"/>		Mara	
<input type="checkbox"/>		Sarah	
<input type="checkbox"/>		Sarah	



# 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”.

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	Enrollments	Attempt Match	Edit	Delete
C62000210698		Nolan		12/7/2018		KINGSTON CITY SD									



- \* 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	Attempt Child Match	Delete
	C62000212737			12/12/18	202122	04/01/22	06/23/22	CB		0 hrs/day 0 days/week		

# 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”.

**Match Child Against County-Imported Child**

**Current Unmatched Child:**  
[Redacted], **Dannielle** County: [Redacted] District: **NEW PALTZ CSD** DOB: **12/12/2018**

**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	[Redacted]	ANNELIESE		12/12/2018	[Redacted]	NEW PALTZ CSD	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Select	[Redacted]	DANNIELLE		12/12/2018	[Redacted]	NEW PALTZ CSD	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

# 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:**  
Dannielle County: District: NEW PALTZ CSD DOB: 12/12/2018

**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		ANNELIESE		12/12/2018		NEW PALTZ CSD					
Select		DANNIELLE		12/12/2018		NEW PALTZ CSD					

**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.

Dannielle (12/12/2018) → DANNIELLE (12/12/2018)

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.

**Unmatched Enrollments**

Provider  School Year

County	Child Number	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description			
	C52000284063		NICHOLAS	09/10/20	202324	02/09/24	06/25/24	RS	OT	2x30	Attendances	<a href="#">Attempt Child Match</a>	<a href="#">Delete</a>
	C01000247729		JAMES	07/09/20	202324	09/06/23	06/21/24	RS	OT1	2x30	Attendances		<a href="#">Delete</a>
	C01000245547		KENNYEL	09/22/20	202324	04/08/24	06/21/24	RS	OT	2x30	Attendances		<a href="#">Delete</a>
	C01000245547		KENNYEL	09/22/20	202324	04/08/24	06/21/24	RS	OT1	2x30	Attendances		<a href="#">Delete</a>
	C01000206963		LIAM	04/14/19	202324	09/06/23	06/21/24	RS	OT1	2x30	Attendances		<a href="#">Delete</a>
	C01000218820		MESSIAH	07/15/19	202324	09/06/23	06/21/24	RS	OT1	2x30	Attendances		<a href="#">Delete</a>
	C01000283082		KEVON	03/29/19	202324	10/11/23	06/21/24	CB		0 hrs/day 0 days/week	Attendances	<a href="#">Attempt Child Match</a>	<a href="#">Delete</a>
	C01000283082		KEVON	03/29/19	202324	10/11/23	06/21/24	RS	ST	3x30	Attendances	<a href="#">Attempt Child Match</a>	<a href="#">Delete</a>
	C01000215127		ISHAAQ	09/18/19	202324	09/06/23	06/21/24	RS	OT1	2x30	Attendances		<a href="#">Delete</a>
	C01000217027		JOSHUA	05/17/19	202324	09/06/23	06/21/24	RS	OT1	2x30	Attendances		<a href="#">Delete</a>
	C52000276823		KODIE	09/11/19	202324	01/29/24	06/21/24	RS	ST1	2x30	Attendances	<a href="#">Attempt Enrollment Match</a>	<a href="#">Delete</a>

# 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:  County:  District:  DOB: 4/20/2017

**Current Unmatched Enrollment:**  
Session: 2021 - 2022 Winter From Date: 1/18/2022 To Date: 6/24/2022  
Enrollment Type: CB Service Type: Individual or Group: I Frequency: 0 hrs/day 0 days/week

**Potential Matches:**

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	CB		2021 - 2022 Winter	1/18/2022	6/24/2022		5 hrs/day	CB2122W0022875
Select	CB		2021 - 2022 Winter	1/18/2022	6/24/2022		5 hrs/day	CB2122W0023034

# 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!”

## Match Enrollment Against County-Imported Enrollment

Child:  County:  District:  DOB: 4/20/2017

### Current Unmatched Enrollment:

Session: 2021 - 2022 Winter From Date: 1/18/2022 To Date: 6/24/2022  
Enrollment Type: CB Service Type: Individual or Group: I Frequency: 0 hrs/day 0 days/week

### Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	CB		2021 - 2022 Winter	1/18/2022	6/24/2022		5 hrs/day	CB2122W0022875
Select	CB		2021 - 2022 Winter	1/18/2022	6/24/2022		5 hrs/day	CB2122W0023034

**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 (1/18/2022 - 6/24/2022) 0 hrs/day 0 days/week → CB2122W0022875 (1/18/2022 - 6/24/2022) 5 hrs/day

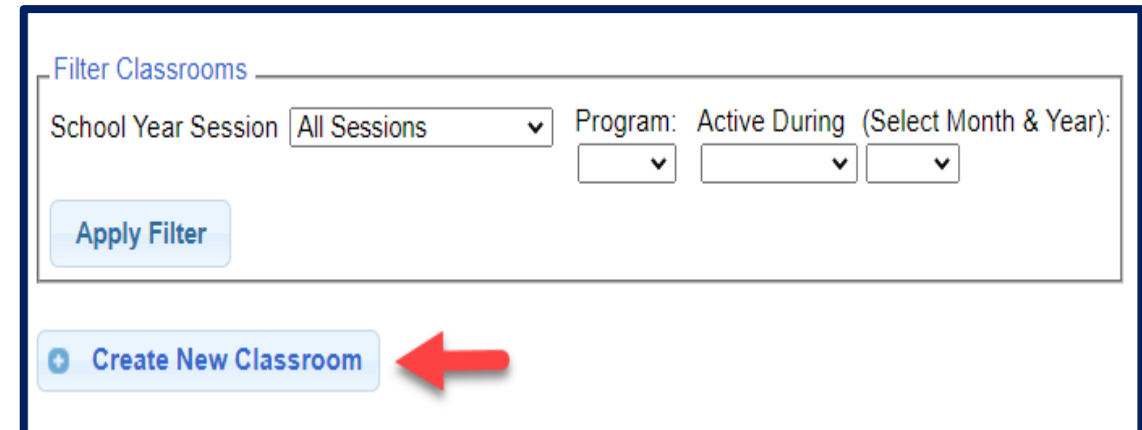
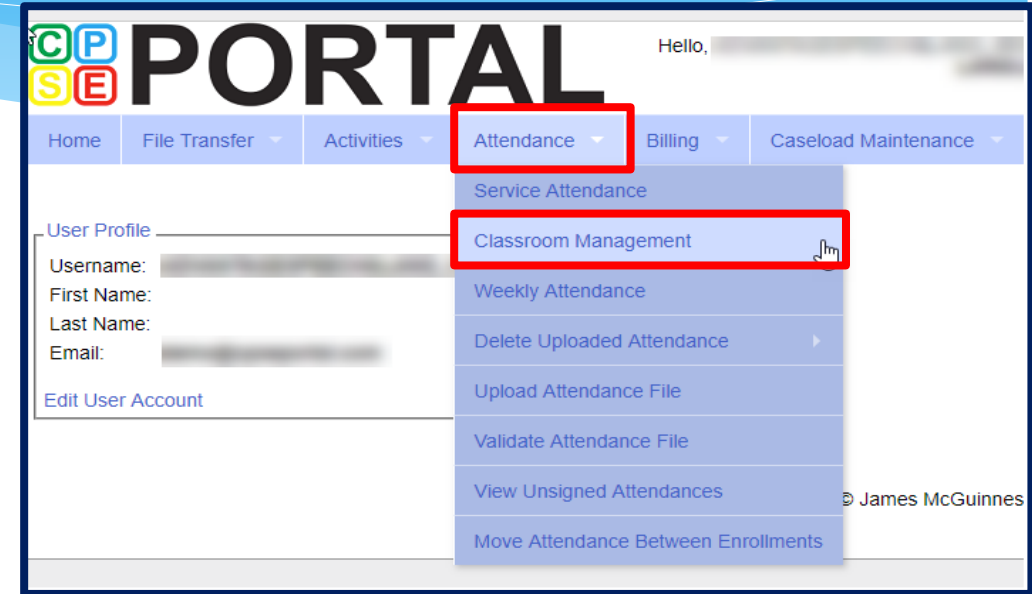
Match!



# Classroom Management

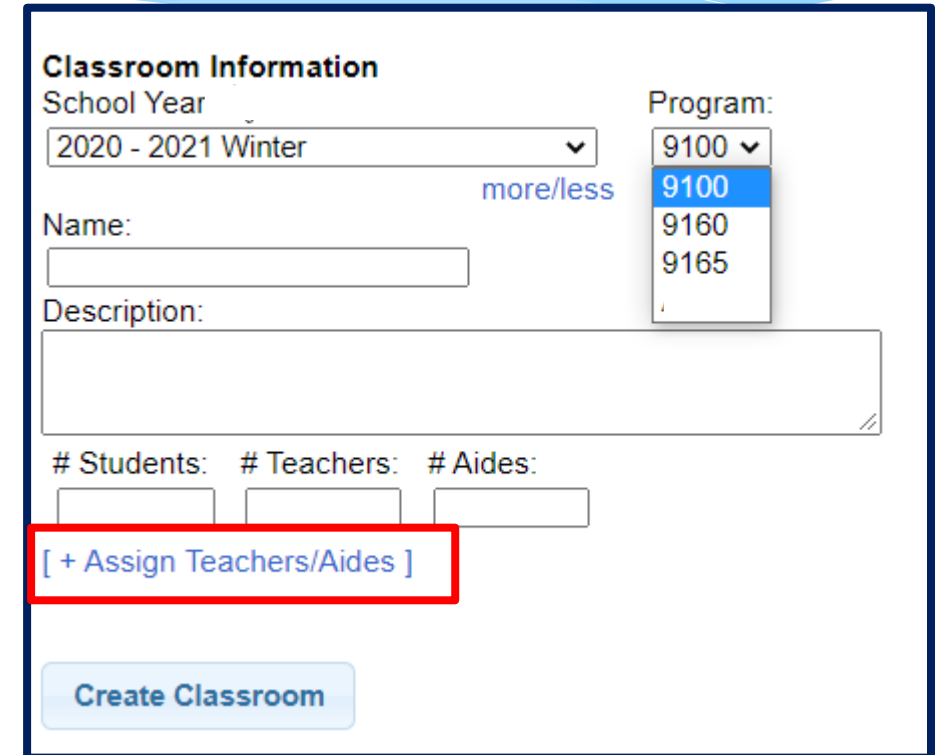
# Classroom Management

- \* Classrooms are created under "*Classroom Management*".
- \* This will allow you to assign teachers/aides to classrooms as well as assign students.
- \* Changes may also be made as well as classroom deletions.
- \* Go to **Attendance -> Classroom Management**
- \* Click on Create New Classroom



# Create Classrooms

- \* Enter classroom information fields
  - \* Select School Year
  - \* Select Program
  - \* Name your classroom & include hours
    - \* I.E.: Room 310 - 2.5 HR PM etc..
  - \* Type in description of classroom & include hours
    - \* I.E.: Integrated 2.5 HR PM etc..
  - \* Enter number of students, number of teachers, and number of aides for this classroom
  - \* **Before** you Create the Classroom, you will Assign Teachers/Aides



**Classroom Information**

School Year: 2020 - 2021 Winter Program: 9100

Name:  9100  
9160  
9165

Description:

# Students:  # Teachers:  # Aides:

[ + Assign Teachers/Aides ]

Create Classroom

# Assigning Teacher/Aide To Classrooms

\* Click on (+Assign Teachers/Aides) link


**Classroom Information**

School Year:  [more/less](#) Program:

Name:

Description:

# Students:  # Teachers:  # Aides:

[ + Assign Teachers/Aides ] 

# Assigning Teacher/Aide To Classrooms

- \* Refer to "Not Assigned" list on right and select name of applicable teacher or aide or "Select All" box;
- \* Make sure correct role is selected
- \* Click *Assign*
- \* Once teacher/aides are assigned to classroom, click on "*Create Classroom*"
- \* Should a teacher or aide leave the classroom this is also where you will un-assign them

Only Include in Unassigned List if Discipline Code is TEACH or AIDE? (will reload lists)

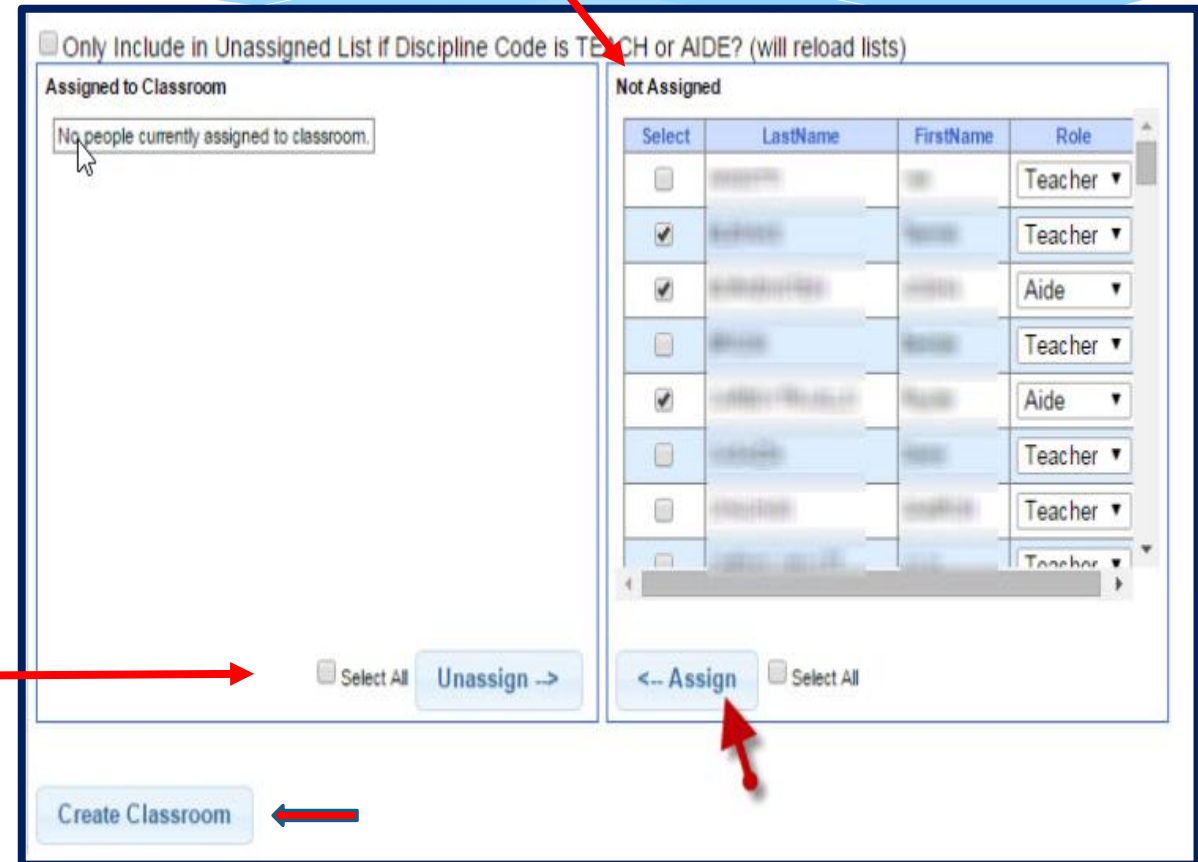
**Assigned to Classroom**

No people currently assigned to classroom.

**Not Assigned**

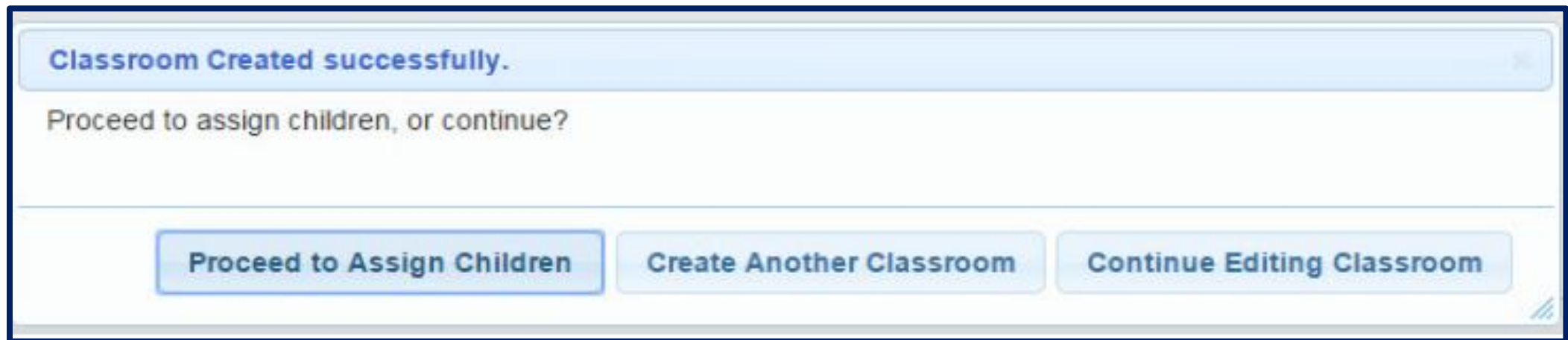
Select	LastName	FirstName	Role
<input type="checkbox"/>			Teacher
<input checked="" type="checkbox"/>			Teacher
<input checked="" type="checkbox"/>			Aide
<input type="checkbox"/>			Teacher
<input checked="" type="checkbox"/>			Aide
<input type="checkbox"/>			Teacher
<input type="checkbox"/>			Teacher
<input type="checkbox"/>			Teacher

Select All          Select All



# Assigning Teacher/Aide To Classrooms

- \* Now you can select "Proceed to Assign Children", "Create Another Classroom", or "Continue Editing Classroom"



# Assigning Children To Classrooms

- \* Select box of child to be assigned (in "not assigned" column) or "Select All" if all are to be assigned
- \* Click "Assign"
- \* To remove a child from the classroom, select box next to child and click "Unassign" or click "Select All" box and click "Unassign"
- \* Click "Save Changes"

Classroom: Vicki Kolano

Assigned to Classroom

Select	Last Name	First Name	District	County	DOB	
<input type="checkbox"/>	AMBROSE	FREDRIC	HIGHLAND CSD	ULSTER	4/16/2017	Details
<input type="checkbox"/>	ARNOLD	VIOLA	HIGHLAND CSD	ULSTER	4/11/2017	Details
<input type="checkbox"/>	CASILLAS	BURT	MARLBORO CSD	ULSTER	8/24/2017	Details
<input type="checkbox"/>	DIETZ	LONI	SAUGERTIES CSD	ULSTER	2/1/2018	Details
<input type="checkbox"/>	JOSEPH	HAROLD	KINGSTON CITY SD	ULSTER	2/14/2018	Details
<input type="checkbox"/>	LAY	ABDUL	HIGHLAND CSD	ULSTER	9/29/2017	Details
<input type="checkbox"/>	MEDEIROS	FOREST	HIGHLAND CSD	ULSTER	3/14/2017	Details
<input type="checkbox"/>	REUTER	MELODY	ONTEORA	ULSTER	4/22/2017	Details

Not Assigned [ + Filter Unassigned Children ]

Select	Last Name	First Name	District	County	DOB	
<input checked="" type="checkbox"/>	CRUZ	DAMION	SAUGERTIES CSD	ULSTER	12/26/2015	Details
<input checked="" type="checkbox"/>	DARNELL	KAREEM	SAUGERTIES CSD	ULSTER	1/19/2018	Details
<input type="checkbox"/>	EASON	AUGUSTUS	KINGSTON CITY SD	ULSTER	5/26/2017	Details
<input type="checkbox"/>	FLORES	ED	PINE BUSH CSD	ULSTER	4/16/2016	Details
<input type="checkbox"/>	FLOWERS	MEAGAN	PINE BUSH CSD	ULSTER	4/16/2016	Details
<input type="checkbox"/>	HARDY	GARRY	KINGSTON CITY SD	ULSTER	12/17/2015	Details
<input type="checkbox"/>	LOOMIS	ROMEO	PINE BUSH CSD	SULLIVAN	9/7/2017	Details

Select All

Select All

# Assigning Children To Classrooms

- \* Once you select "Proceed to Assign Children"
- \* Select "Details" link to review service details of the child
  - \* You can review child info on under the "Child Demographic Info" tab
  - \* You can review service info under the "Service Info" tab
- \* You can also click on "Sessions for Enrollment Report" link to run an enrollment report.
  - \* Enter report criteria with from/to dates and click "Run"
- \* When ready to assign child to classroom, click back button to return to Classroom screen




Child Demographic Info Service Info

First Name [REDACTED]  
Last Name [REDACTED]  
DOB [REDACTED]  
Gender F  
Address [REDACTED]  
County Albany  
District COHOES CITY SD

Sessions For Enrollment Report

A red arrow points from the "Proceed to Assign Children" text in the list to the "Child Demographic Info" tab.



Select Report Criteria

CB  CBRS  RS  SEIT

From Date: 9/1/2014 To Date: 6/30/2015

A red arrow points from the "Sessions for Enrollment Report" text in the list to this form.



Child Demographic Info Service Info

Service ID [REDACTED]  
Enrollment Type CB  
Provider Name [REDACTED]  
Program Code 9165  
STAC Code I  
From Date 9/3/2014  
To Date 10/30/2014  
Frequency 2.5 hrs/day

Sessions For Enrollment Report

A red arrow points from the "Service Info" tab to the "Enrollment Type" field.

# Assigning Children To Classrooms

- \* Once you select "Proceed to Assign Children"
- \* Select "Details" link to review service details of the child
  - \* You can review child info on under the "Child Demographic Info" tab
  - \* You can review service info under the "Service Info" tab
- \* You can also click on "Sessions for Enrollment Report" link to run an enrollment report.
  - \* Enter report criteria with from/to dates and click "Run"
- \* When ready to assign child to classroom, click back button to return to Classroom screen




Child Demographic Info Service Info

First Name [REDACTED]  
Last Name [REDACTED]  
DOB [REDACTED]  
Gender F  
Address [REDACTED]  
County Albany  
District COHOES CITY SD

Sessions For Enrollment Report

A red arrow points from the "Proceed to Assign Children" text in the list to the top right corner of this screenshot.



Select Report Criteria

CB  CBRS  RS  SEIT

From Date: 9/1/2014 To Date: 6/30/2015

A red arrow points from the "Sessions for Enrollment Report" text in the list to the top right corner of this screenshot.



Child Demographic Info Service Info

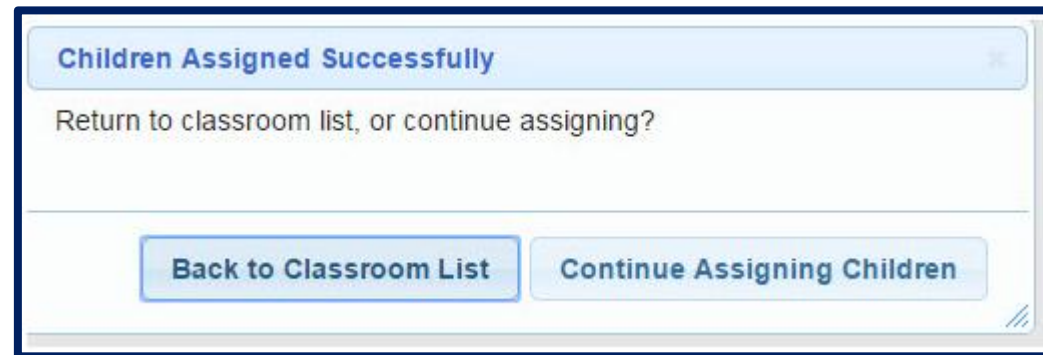
Service ID [REDACTED]  
Enrollment Type CB  
Provider Name [REDACTED]  
Program Code 9165  
STAC Code I  
From Date 9/3/2014  
To Date 10/30/2014  
Frequency 2.5 hrs/day

Sessions For Enrollment Report

A red arrow points from the "Service Info" tab in the list to the top right corner of this screenshot.

# Assigning Children To Classrooms

- \* After saving your changes, you can either go to *Back to Classroom List* or *Continue Assigning Children*.



# Classroom List

- \* Go to **Attendance -> Classroom Management**, filter the school session, and “Apply Filter”.
- \* All additions or updates may be accessed by selecting the following links:
  - \* Attendance may be viewed by clicking on "Attendance"
  - \* Classroom info, including assigning of teachers/aides, may be updated by clicking "Edit Classroom"
  - \* Children may be assigned or unassigned by clicking "Assign Children"
  - \* Classrooms may also be deleted by clicking "Delete Classroom"

Filter Classrooms

School Year Session: **2021 - 2022 Winter** Program: Active During (Select Month & Year):

**Apply Filter**

Attendance	Class	Description	School Year	Program	# Students	# Teachers	# Aides			
Attendance	(5:1:0)		2021 - 2022 Winter	9160	7	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	8:1:2)		2021 - 2022 Winter	9100	2	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	:2)		2021 - 2022 Winter	9100	7	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	S (2:1:0)		2021 - 2022 Winter	9160	6	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	S (6:1:1)		2021 - 2022 Winter	9160	4	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(8:1:2)		2021 - 2022 Winter	9100	9	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(8:1:2)		2021 - 2022 Winter	9160	0	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	CIS (4:1:0)		2021 - 2022 Winter	9160	3	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(4:1:1)		2021 - 2022 Winter	9160	6	1	0	Edit Classroom	Assign Children	Delete Classroom

**Create New Classroom**



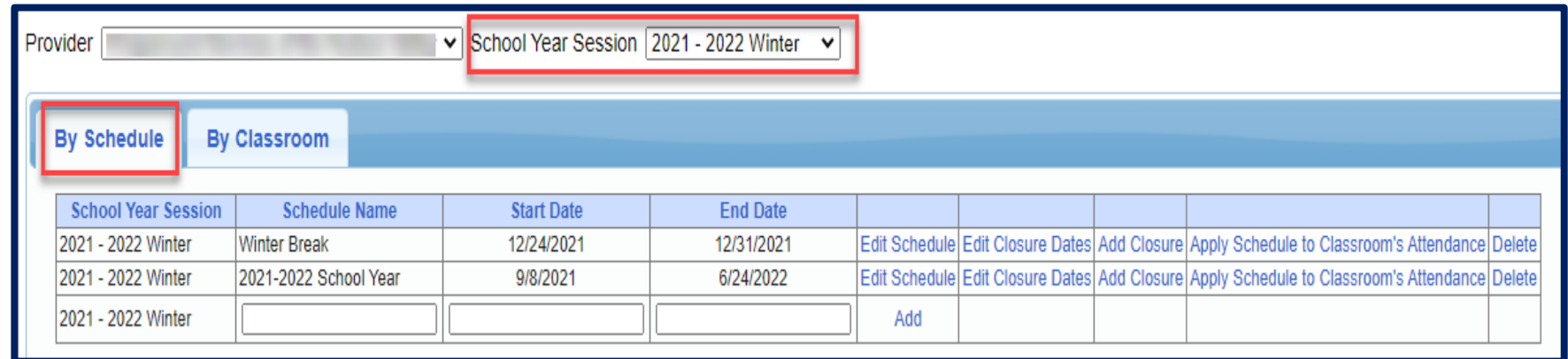
# Creating a School Schedule

# Creating a School Schedule

- \* Go to **Attendance -> Classroom Schedule Maintenance -> By Schedule**
- \* Click drop down on the top Labeled “*School Year Session*”, and be sure to select the correct school year.
- \* The Schedule name must be filled out as well as the start and end dates. Once this is done click the “*Add*” button.
- \* If there are alternative locations with a different schedule those can also be entered on this screen.



A screenshot of a navigation menu. The 'Attendance' dropdown is highlighted with a red box. Below it, 'Classroom Schedule Maintenance' is also highlighted with a red box. A red arrow points from this menu to the right.



A screenshot of the 'By Schedule' form. The 'School Year Session' dropdown is highlighted with a red box. Below it, the 'By Schedule' tab is highlighted with a red box. A table with columns for 'School Year Session', 'Schedule Name', 'Start Date', 'End Date', and action buttons is visible.

School Year Session	Schedule Name	Start Date	End Date					
2021 - 2022 Winter	Winter Break	12/24/2021	12/31/2021	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	2021-2022 School Year	9/8/2021	6/24/2022	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add				

# Adding School Closures

\* School closures can be added ahead of time to designate holidays or planned school closures/snow days.

\* Click on “Add Closure”

\* Add the Date of Closure as well as a description and click the “Ok” button.

Provider  School Year Session

School Year Session	Schedule Name	Start Date	End Date					
2021 - 2022 Winter	Winter Break	12/24/2021	12/31/2021	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	2021-2022 School Year	9/8/2021	6/24/2022	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add				

**Add Closure**

Schedule: 9/4/19-6/26/20 alt

Date Of Closure:

Description:

# Editing a Closure Date

- \* Click on “Edit Closure Date” to edit the closure already entered or add more closures.

Provider  School Year Session

**By Schedule** **By Classroom**

School Year Session	Schedule Name	Start Date	End Date					
2021 - 2022 Winter	Winter Break	12/24/2021	12/31/2021	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	2021-2022 School Year	9/8/2021	6/24/2022	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add				

**Session Name:** 9/4/19-6/26/20 alt  
**School Year Session:** 201920 WIN  
**First Day of Class:** 09/04/2019      **Last Day of Class:** 06/25/2020

Start Date	End Date	Closure Description		
1/13/2020	1/13/2020	MLK Day	Edit	Delete
5/25/2020	5/25/2020	Memorial Day	Edit	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	Add	

# Applying Schedule to Classroom's Attendance

- \* Once closures are entered they can be applied to the schedule to the classroom's attendance.
- \* Click on "Apply Schedule to Classroom's Attendance"
- \* On the next screen you can chose the closure you want to apply to the schedule. The Schedule Month will allow for the month to be chosen.
- \* The closure that is entered for that month will appear press "OK" button.
- \* You will then get a successful message.
- \* This can be done for every closure that has been entered for the school year.

Provider  School Year Session 2021 - 2022 Winter

By Schedule By Classroom

School Year Session	Schedule Name	Start Date	End Date					
2021 - 2022 Winter	Winter Break	12/24/2021	12/31/2021	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	2021-2022 School Year	9/8/2021	6/24/2022	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add				

Apply Closures for Month to Child Attendance Records

Schedule Month:

Start Date	End Date	Description
01/13/20	01/13/20	MLK Day

OK

January Schedule Dates applied successfully

Provider EARLY SUCCESS INC School Year Session 2019 - 2020 Winter

# Adding Closures to Classrooms

Provider  School Year Session

Classroom Name	Description	School Year Session	Program	Schedule				
Maplewood 9-2 Priscilla	Maplewood 9-2 Priscilla	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 830-130 Marlene	Maplewood 830-130 Marlene/Jessica	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 8-1 Heather	Maplewood 8-1 Heather	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 830-130 Jenna	Maplewood 830-130 Jenna	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 8-1 Katrina	Maplewood 8-1 Katrina	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 9-2 Ruth	Maplewood 9-2 Ruth	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign

\* The process is the same but is done under the *By Classroom Tab*

**Add Closure**

Schedule: Classroom: AQ - 1 AM

Date Of Closure:

# Adding Closures to Classrooms

- \* Click on *Apply Schedule to Classroom Attendance* once closures are added.
- \* Once you Apply the Schedule to Classroom's Attendance this creates closure attendances based upon the schedule you just created.
- \* These attendances need to be digitally signed, the same way you would previously sign a Provided or Present session.

Provider:  School Year Session:

Classroom Name	Description	School Year Session	Program	Schedule					
Maplewood 9-2 Priscilla	Maplewood 9-2 Priscilla	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	<b>Apply Schedule to Classroom's Attendance</b>	Unassign	
Maplewood 830-130 Marlene	Maplewood 830-130 Marlene/Jessica	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign	
Maplewood 8-1 Heather	Maplewood 8-1 Heather	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign	
Maplewood 830-130 Jenna	Maplewood 830-130 Jenna	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign	
Maplewood 8-1 Katrina	Maplewood 8-1 Katrina	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign	
Maplewood 9-2 Ruth	Maplewood 9-2 Ruth	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign	



# Entering Classroom Attendance

# Entering Classroom Attendance

- \* Go to **Attendance -> Classroom Management**
- \* Click on attendance to the right of the classroom

Filter Classrooms

School Year Session:  Program: Active During (Select Month & Year):

Attendance	Class	Description	School Year	Program	# Students	# Teachers	# Aides			
Attendance	(5:1:0)		2021 - 2022 Winter	9160	7	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	8:1:2)		2021 - 2022 Winter	9100	2	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	:2)		2021 - 2022 Winter	9100	7	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	S (2:1:0)		2021 - 2022 Winter	9160	6	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	S (6:1:1)		2021 - 2022 Winter	9160	4	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(8:1:2)		2021 - 2022 Winter	9100	9	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(8:1:2)		2021 - 2022 Winter	9160	0	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	DIS (4:1:0)		2021 - 2022 Winter	9160	3	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(4:1:1)		2021 - 2022 Winter	9160	6	1	0	Edit Classroom	Assign Children	Delete Classroom

# Entering Classroom Attendance


- \* The date of 5/25/20 is greyed out since we had previously added it as a Holiday and applied it to the schedule.
- \* This will be applied to all the children in the classroom.

Enrollment	Mon <input checked="" type="checkbox"/>
	05/25/20
9/04/19-6/26/20 (CB1920W0107131)	
9/04/19-6/26/20 (CB1920W0105819)	
9/04/19-6/26/20 (CB1920W0104753)	
9/04/19-6/26/20 (CB1920W0105598)	
9/04/19-6/26/20 (CB1920W0105099)	
9/04/19-6/26/20 (CB1920W0105096)	
11/13/19-6/26/20 (CB1920W0107338)	
9/04/19-6/26/20 (CB1920W0106004)	

# Entering Classroom Attendance

- \* If a child is present single click on the day and it will be highlighted in green. Green indicates child was present for that day.
- \* If the child was absent double click on the day and it will change to the color Red. Red indicates the child was absent for that day.


Classroom: Leanna Dunne Unsaved attendance changes exist.

Current Week   
 < 06/18/23 - 06/24/23 >

Print Attendance Sheet

Child	Enrollment	Mon <input checked="" type="checkbox"/>	Tue <input checked="" type="checkbox"/>	Wed <input checked="" type="checkbox"/>	Thu <input checked="" type="checkbox"/>	Fri <input checked="" type="checkbox"/>
		06/19/23	06/20/23	06/21/23	06/22/23	06/23/23
COTTRELL, MELISSA	9/06/22-6/23/23 (CB2223W0009980)					
HATCHER, BRENT	9/06/22-6/23/23 (CB2223W0009975)					
HICKS, TOM	9/06/22-6/23/23 (CB2223W0010140)					
MARSH, DOMINGO	9/06/22-6/23/23 (CB2223W0009949)					
PRICE, ANGLEA	9/06/22-6/23/23 (CB2223W0013619)					
RANGEL, DERRICK	10/29/22-6/23/23 (CB2223W0010186)					
RUBIO, LEOPOLDO	12/12/22-6/23/23 (CB2223W0010210)					
ZAMORA, DENNY	9/06/22-6/23/23 (CB2223W0010150)					

Total Sessions: 40

Return to Classrooms  Save Attendances

# Signing Classroom Attendance

- \* Classroom attendance can be signed by the teacher or an agency administrator.
- \* Go to **Attendance -> Digital Signature -> Sign Classroom Attendance**



# Signing Classroom Attendance

- \* This screen shows the attendance you need to review/edit/sign for.
- \* You can filter by a classroom, month, the county and provider.
- \* Once you have selected your filter, hit “Retrieve”.

Classroom:  Month:  County:  Provider:

<input type="checkbox"/>	Child Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
<input type="checkbox"/>	EASON, ULYSSES	Green	Green	Green			Green	Green	Green	Green	Green			Green	Red	Green	Green	Red			Grey	Grey	Grey	Grey	Grey			Green	Red			
<input type="checkbox"/>	HAGAN, MARCO	Green	Green	Green			Red	Red	Red	Green	Green			Green	Red	Green	Green	Green			Grey	Grey	Grey	Grey	Grey			Green	Green			
<input type="checkbox"/>	HEWITT, RONNIE	Green	Red	Green			Green	Green	Green	Green	Green			Green	Green	Green	Green	Red			Grey	Grey	Grey	Grey	Grey			Green	Green			
<input type="checkbox"/>	JOSEPH, HAROLD	Green	Green	Green			Green	Green	Green	Green	Green			Green	Green	Green	Green	Green			Grey	Grey	Grey	Grey	Grey			Green	Green			
<input type="checkbox"/>	RUSHING, ORVILLE	Green	Green	Red			Red	Green	Green	Red	Green			Green	Green	Green	Green	Green			Grey	Grey	Grey	Grey	Grey			Red	Green			

# Signing Classroom Attendance

- \* Teachers can delete attendances but you cannot add them on this screen before you sign your attendances.
- \* First, select the attendances you wish to sign for by clicking the box next to each name.
- \* Once you have reviewed/edited your attendance, click on “Sign Attendance”
- \* Read the agreement, enter your pin and click “I agree.”

Classroom:  Month:  County:  Provider:

<input type="checkbox"/>	Child Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
<input type="checkbox"/>	EASON, ULYSSES	Green	Green	Green			Green	Green	Green	Green	Green			Green	Red	Green	Green	Red			Grey	Grey	Grey	Grey	Grey			Green	Red			
<input type="checkbox"/>	HAGAN, MARCO	Green	Green	Green			Red	Red	Red	Green	Green			Green	Red	Green	Green	Green			Grey	Grey	Grey	Grey	Grey			Green	Green			
<input type="checkbox"/>	HEWITT, RONNIE	Green	Red	Green			Green	Green	Green	Green	Green			Green	Green	Green	Green	Red			Grey	Grey	Grey	Grey	Grey			Green	Green			
<input type="checkbox"/>	JOSEPH, HAROLD	Green	Green	Green			Green	Green	Green	Green	Green			Green	Green	Green	Green	Green			Grey	Grey	Grey	Grey	Grey			Green	Green			
<input type="checkbox"/>	RUSHING, ORVILLE	Green	Green	Red			Red	Green	Green	Green	Red	Green			Green	Green	Green	Green	Green		Grey	Grey	Grey	Grey	Grey			Red	Green			



# Reports

# Enrollment & ESID

- ❖ The enrollment should correspond to a unique approved service on the IEP. Separate enrollments for
  - ❖ Different service types (OT vs PT vs ST)
  - ❖ Different frequencies (1x30 vs 1x45 vs 2x30) (if the CPSE alters the IEP and changes the frequency during the year, a new enrollment should be created)
  - ❖ Individual vs Group (if the CPSE determine 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, 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	MatchStatus	
C62000182949	ALV		2/14/2018		KINGSTON CITY SD		County Record	<input type="button" value="Details"/>



Enrollments | Written Orders | Documents

View Information for School Year:

Strikethrough = The county deleted this enrollment

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

# Enrollment Lookup Report

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

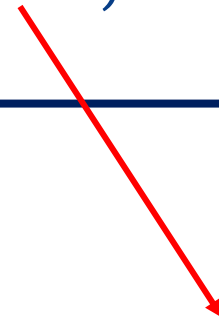
**Enrollments**

School Year Session  County   CBRS   
 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			4/11/2017				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  County   CBRS   
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	ALI		4/11/2017				CBRS	HLT	7/12/2021	8/20/2021	5x15	I	9100-A		0.00	0.00	6	6		Attendances

# 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:  Provider:  School Year Session: 
 CB  CBRS  SEIT  RS  
 Added After:  Added Before:

County	Provider	Child	School Year	From Date	To Date	Enrollment Type	Service Type	ESID	Frequency	Date Added	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	FONG, MASAKO	202223 WIN	9/6/2022	6/23/2023	CB		CB2223W0003573	5 hrs/day	8/11/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	FONG, MASAKO	202223 WIN	9/6/2022	6/23/2023	CBRS	ST	CBRS2223W0008791	2x30	8/11/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	FONG, MASAKO	202223 WIN	9/6/2022	6/23/2023	CBRS	OT	CBRS2223W0008792	2x30	8/11/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	FONG, MASAKO	202223 WIN	9/6/2022	6/23/2023	CBRS	ST1	CBRS2223W0008911	1x30	9/13/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	HENSLEY, ALVIN	202223 WIN	10/11/2022	6/23/2023	CB		CB2223W0003652	5 hrs/day	10/6/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	HENSLEY, ALVIN	202223 WIN	10/11/2022	6/23/2023	CBRS	ST	CBRS2223W0008934	3x30	10/6/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	KENNY, DONALD	202223 WIN	9/6/2022	6/23/2023	CB		CB2223W0003648	5 hrs/day	10/4/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	KENNY, DONALD	202223 WIN	9/6/2022	6/23/2023	CBRS	ST	CBRS2223W0008925	2x30	10/4/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	KENNY, DONALD	202223 WIN	9/6/2022	6/23/2023	CBRS	OT	CBRS2223W0008926	2x30	10/4/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	MILLIGAN, SCARLETT	202223 WIN	9/6/2022	6/23/2023	CB		CB2223W0003647	5 hrs/day	10/4/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	MILLIGAN, SCARLETT	202223 WIN	9/6/2022	6/23/2023	CBRS	ST	CBRS2223W0008923	2x30	10/4/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	MILLIGAN, SCARLETT	202223 WIN	9/6/2022	6/23/2023	CBRS	OT	CBRS2223W0008924	2x30	10/4/2022	Attendance	View
SULLIVAN	LEARNING TOGETHER, INC.	MILLIGAN, SCARLETT	202223 WIN	11/7/2022	6/23/2023	CBRS	PT	CBRS2223W0008951	2x30	10/25/2022	Attendance	View

# 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: 2021 - 2022 Summer Provider:   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	
		CBRS2122S0035720	OT			SAUGERTIES CSD	07/05/2021	08/13/2021	1x30	I			Edit Assignment
		CBRS2122S0036189	ST			SAUGERTIES CSD	07/05/2021	08/13/2021	2x30	I			Edit Assignment
		CBRS2122S0036190	ST1			SAUGERTIES CSD	07/05/2021	08/13/2021	1x30	G			Edit Assignment
		CBRS2122S0036191	OT			SAUGERTIES CSD	07/05/2021	08/13/2021	1x30	I			Edit Assignment





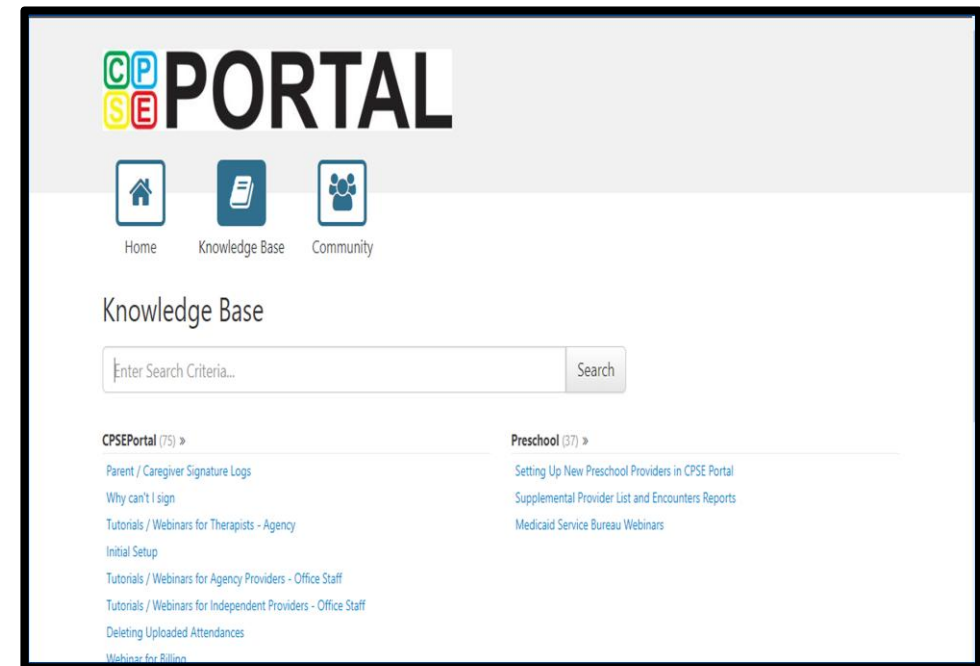
# Closing

# 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>
- \* Entering Unmatched CBRS Enrollments:
  - \* <http://support.cpseportal.com/kb/a254/entering-unmatched-cbrs-enrollments.aspx?KBSearchID=16570>
- \* Assigning Children to Therapist:
  - \* <http://support.cpseportal.com/kb/a34/assign-children-to-therapist.aspx?KBSearchID=19809>
- \* Classroom Management
  - \* <http://http://support.cpseportal.com/kb/a42/classroom-management.aspx>

# Knowledge Base Links

- \* Creating a School Schedule

- \* <http://support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx?KBSearchID=16564>

- \* Entering Classroom Attendance

- \* <http://support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=16571>

- \* 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>

# Upcoming Webinars

## CPSE Portal Case Management for Agency Service Providers: **Agency Service Providers**

\* **Monday, June 1<sup>st</sup>, 2026 @ 10:00AM**

\* <https://attendee.gotowebinar.com/register/8688438095073276763>

\* **Monday, June 1<sup>st</sup>, 2026 @ 3:30PM**

\* <https://attendee.gotowebinar.com/register/5201199528628228699>

### \* **Topics:**

\* *What are Unmatched Children & Enrollments*

\* *My Caseload*

\* *Digital Orders*

\* *Reports*

# 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](mailto: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