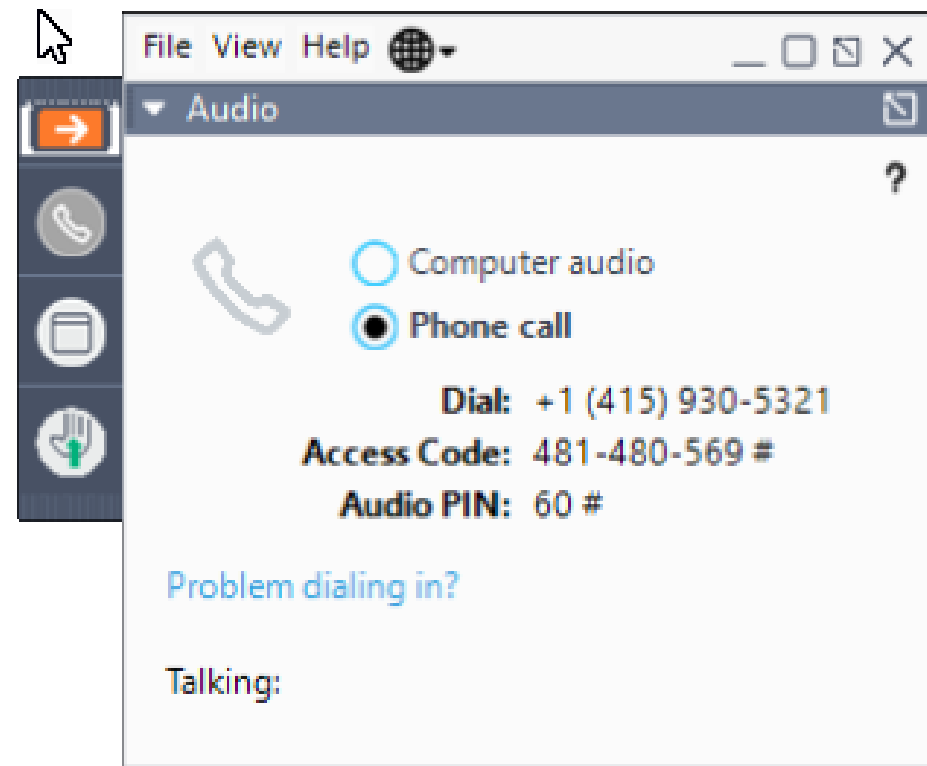


JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants

# 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

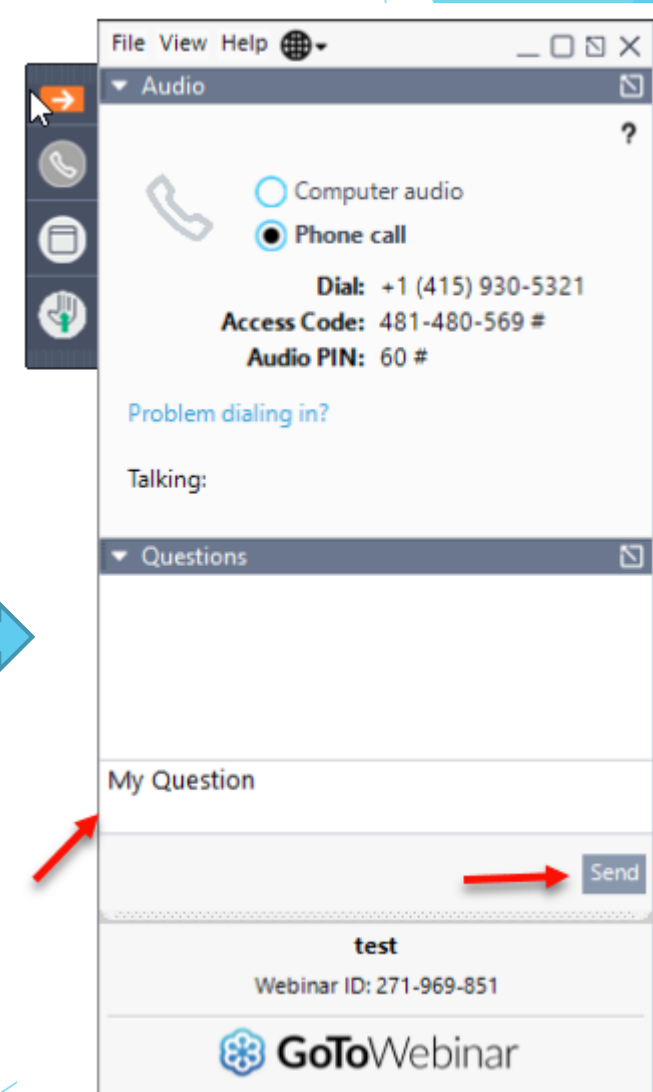
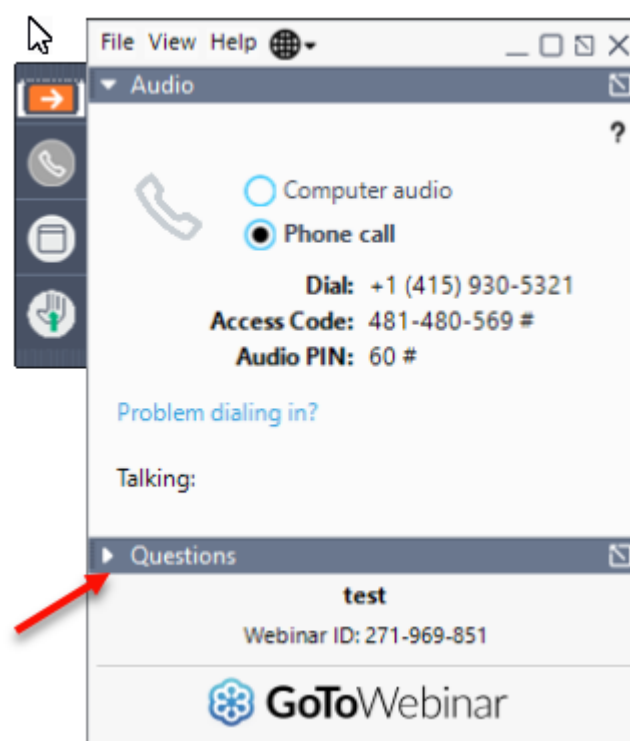


# Communicating with Presenter

- ▶ All participants are on mute
- ▶ You can type in question in the question box
- ▶ We will answer your question, and also stop at some point to review the questions and answers for everyone.

# Typing in a Question

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



# Case Management

For Agencies

# Topics Covered

- ❖ Child Lookup - [slide 3](#)
  - ❖ Advanced Search - [slide 4](#)
- ❖ Unmatched Children and Enrollments - [slide 5](#)
  - ❖ Adding an Unmatched Child - [slide 7](#)
  - ❖ Editing an Unmatched Child - [slide 8](#)
  - ❖ Adding an Unmatched Enrollment - [slide 9](#)
- ❖ Assigning Children to Therapist for CBRS/RS - [slide 13](#)
- ❖ Assigning Children to Teacher for SEIT - [slide 15](#)
- ❖ View Unmatched Enrollments - [slide 17](#)
- ❖ Matching Children - [slide 18](#)
- ❖ Matching Enrollments - [slide 21](#)
- ❖ Enrollment Lookup Report - [slide 24](#)
  - ❖ How to find an ESID - [slide 27](#)
- ❖ Enrollment Assignments Report - [slide 28](#)

# Child Lookup

- ❖ 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  Search [\[ Show Advanced Search options \]](#)

Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	Details
SCHAFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	<a href="#">Details</a>
SCHAFER	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

Last Name   [\[ Show Advanced Search options \]](#)



- ❖ School Year
- ❖ County
- ❖ Provider
- ❖ District
- ❖ STAC ID
- ❖ Electronic Service ID (ESID)

## Child Lookup

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

School Year  County  Provider  District

Child Number  STAC ID  Electronic Service ID  Medicaid CIN



# Enrollment & ESID

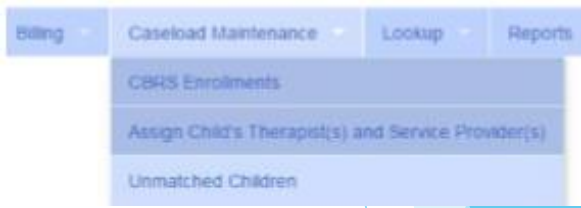
- ❖ The enrollment should correspond to a unique approved service on the IEP. Separate enrollments for
  - ❖ Different service types (OT vs PT vs ST)
  - ❖ Different frequencies (1x30 vs 1x45 vs 2x30) (if the CPSE alters the IEP and changes the frequency during the year, a new enrollment should be created)
  - ❖ 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

# Unmatched Children and 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 temporary child and 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 they do that, any data entered for the temporary record is moved to the County created one 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

# Unmatched Children

- ❖ Navigate top menu to Caseload Maintenance > Unmatched Children
- ❖ Click “Add Child” to add an Unmatched Child



## Unmatched Children

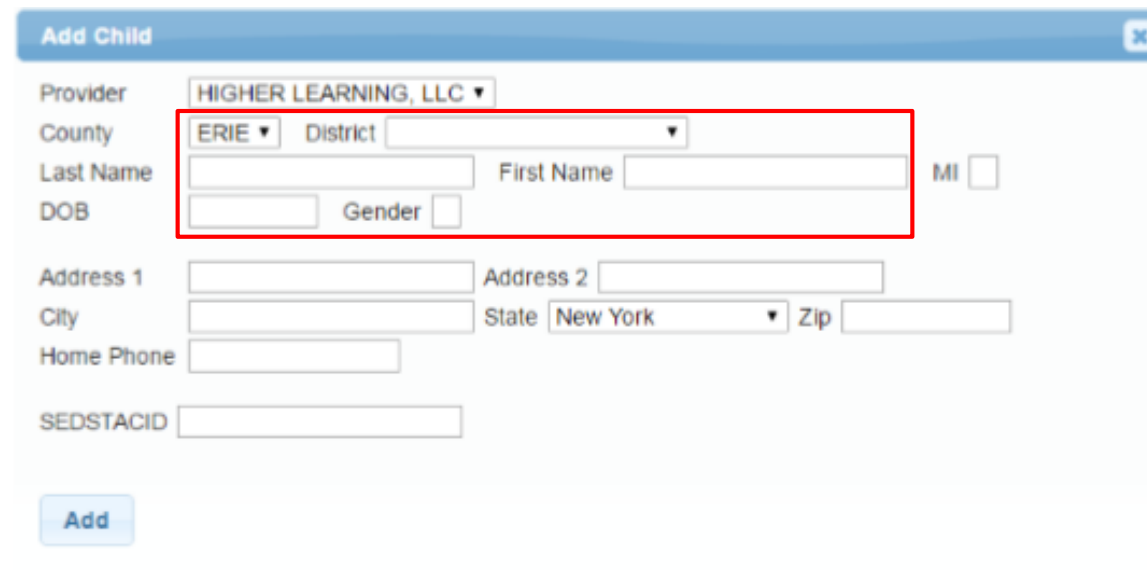
Add Child



Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone				
AYERS	EARLENE		8/14/2011	ERIE	Buffalo			NY			Enrollments	Attempt Match	Edit	Delete
CUMMINS	VENA		5/29/2011	ERIE	North Collins			NY			Enrollments	Attempt Match	Edit	Delete
CUNNINGHAM	THERESIA		8/2/2011	ERIE	Frontier			NY			Enrollments	Attempt Match	Edit	Delete

# Adding an Unmatched Child

- ❖ Click Add Child button on Unmatched Children Screen
- ❖ Enter in the information
- ❖ Required fields
  - ❖ County
  - ❖ District
  - ❖ Last Name
  - ❖ First Name
  - ❖ DOB
  - ❖ Gender
- ❖ All other fields optional



The screenshot shows a web form titled "Add Child" with a close button in the top right corner. The form contains the following fields:

- Provider: A dropdown menu showing "HIGHER LEARNING, LLC".
- County: A dropdown menu showing "ERIE".
- District: A dropdown menu.
- Last Name: A text input field.
- First Name: A text input field.
- MI: A checkbox.
- DOB: A text input field.
- Gender: A dropdown menu.
- Address 1: A text input field.
- Address 2: A text input field.
- City: A text input field.
- State: A dropdown menu showing "New York".
- Zip: A text input field.
- Home Phone: A text input field.
- SEDSTACID: A text input field.

A red rectangular box highlights the "County", "District", "Last Name", "First Name", "DOB", and "Gender" fields, indicating they are required. An "Add" button is located at the bottom left of the form.

# Editing an Unmatched Child

- ❖ Click on “Edit” next to the child you would like to edit

Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone				
AYERS	EARLENE		8/14/2011	ERIE	Buffalo			NY			Enrollments	Attempt Match	Edit	Delete
CUMMINS	VENA		5/29/2011	ERIE	North Collins			NY			Enrollments	Attempt Match	Edit	Delete

- ❖ You can edit
  - ❖ Name
  - ❖ Date of Birth
  - ❖ District
- ❖ Click “Update” to save your changes

Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone				
AYERS	EARLENE		8/14/2011	ERIE	Buffalo			NY			Enrollments	Attempt Match	Update	Cancel
CUMMINS	VENA		5/29/2011	ERIE	North Collins			NY			Enrollments	Attempt Match	Edit	Delete

# Adding an Unmatched Enrollment

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan	
HIGHER LEARNING, LLC ▼	2015 - 2016 Winter ▼	09/13/15	06/24/16	RS ▼	OT ▼	I ▼	2	45	Weekly ▼	Add

## ❖ Fields

- ❖ Session (School year and either summer session or 10-month Sep-Jun called winter)
- ❖ From and To Dates
- ❖ Enrollment Type
  - ❖ CB - tuition based classroom
  - ❖ SEIT/SEIS = Special Education Itinerant Teacher/Service
  - ❖ RS = Fee for Service Related Service (OT, PT, ST, etc.)
- ❖ RS Type - OT, PT,
- ❖ I or G is Individual vs. Group
- ❖ Units/Minutes & Timespan refer to frequency (For ex. 2x45 Weekly)
- ❖ 2 = units
- ❖ 45 = minutes
- ❖ Weekly = Timespan

# Adding Enrollments from Unmatched Children

- ❖ Click the Enrollments link on the child

Unmatched Children [Add Child](#)

Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone				
AYERS	EARLENE		8/14/2011	ERIE	Buffalo			NY			Enrollments	Attempt Match	Edit	Delete
CUMMINS	IVENA		5/29/2011	ERIE	North Collins			NY			Enrollments	Attempt Match	Edit	Delete

- ❖ Enter your data on the blank row and click Add

Unmatched Enrollments

AYERS, EARLENE County: ERIE District: Buffalo DOB: 8/14/2011 [Redo Search](#)

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan		
HIGHER LEARNING, LLC	2015 - 2016 Winter	2/2/2016	6/30/2016	RS	ST	I	2.00	30	Weekly	Attempt Match	Delete
HIGHER LEARNING, LLC ▼	▼			▼	▼	▼			Weekly ▼	Add	

# 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 either Unmatched Children page or Add/Edit Unmatched Enrollments page
- ❖ For a County-created Child, you need to use Add/Edit Unmatched Enrollments





# Adding Enrollments from Add/Edit Unmatched Enrollments

- ❖ Search for the child
- ❖ Click “Select” next to the child’s name

## Unmatched Enrollments

Last Name   [ Show All ]



	Last Name	First Name	DOB	SED STAC ID	District
<a href="#">Select</a>	SMITH	SANFORD	9/16/2012	G04764	Cleveland Hill

- ❖ Enter your data on a blank row and click “Add”

## Unmatched Enrollments

SMITH, SANFORD County: **ERIE** District: **Cleveland Hill** DOB: **9/16/2012**

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan	
HIGHER LEARNING, LLC ▼	<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"/>

# Questions?

# Assigning Enrollments to Therapist

- ❖ Caseload Maintenance > Caseload
- ❖ Select therapist under “Person” dropdown and click Retrieve
- ❖ Click “Add New Assignment”

Filter By

Provider	LG INTERVENTION SPECIALISTS, INC. ▼	School Year Session	2019 - 2020 Winter ▼	Person:	<input type="text"/>	Retrieve
----------	-------------------------------------	---------------------	----------------------	---------	----------------------	----------

Add New Assignment

- ❖ Filter by Enrollment type, Service type, or Last Name and click “Retrieve” to bring up any enrollments that fit the description

Assign Cases To BRANDON KELLY for the 201920 WIN session

Filter By...

Enrollment Type:	(Any Enrollment Type) ▼	Service Type:	(All Service Types) ▼	Last Name:	<input type="text"/>	
Items Per Page	50 ▼					Retrieve

Assign Selected to BRANDON KELLY

Return to Caseload

# Assigning Enrollments to Therapist

- ❖ Select the enrollments you want to assign to this therapist and click “Assign Selected To [Therapist’s Name]”

Filter By...

Enrollment Type: (Any Enrollment Type) Service Type: ST Last Name:

Items Per Page 50

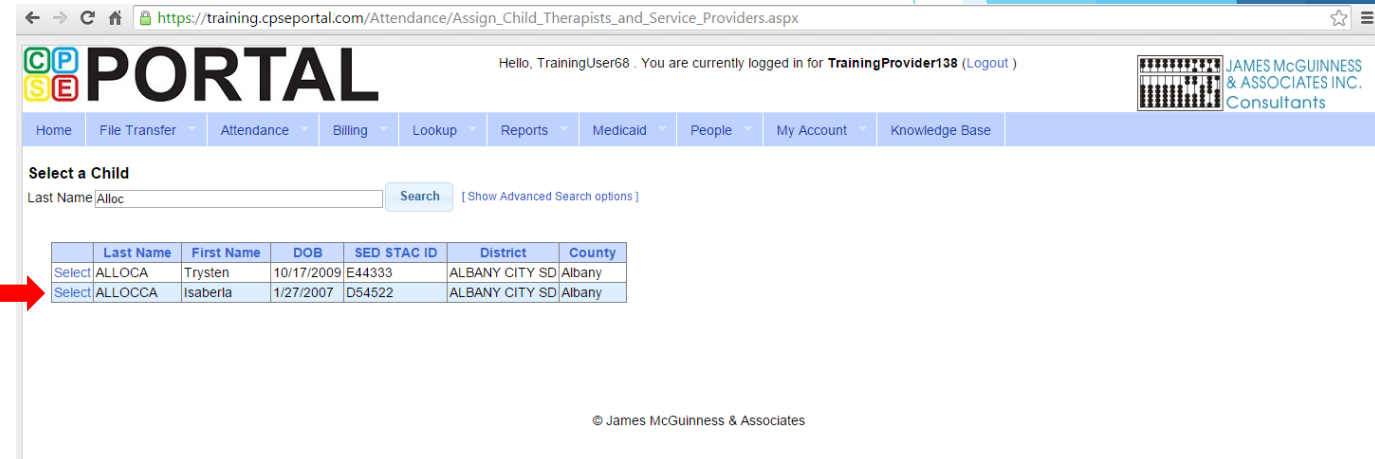
Assign Selected to BRANDON KELLY Return to Caseload

	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

- ❖ Click “Return to Caseload” to return to the previous therapist search page

# Assigning Therapists to Children

- ❖ Caseload Maintenance > Assign Child's Therapist(s) and Service Provider(s)
- ❖ Search for a child and select the child you are working on
- ❖ Select the enrollment



CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for **TrainingProvider138** (Logout)

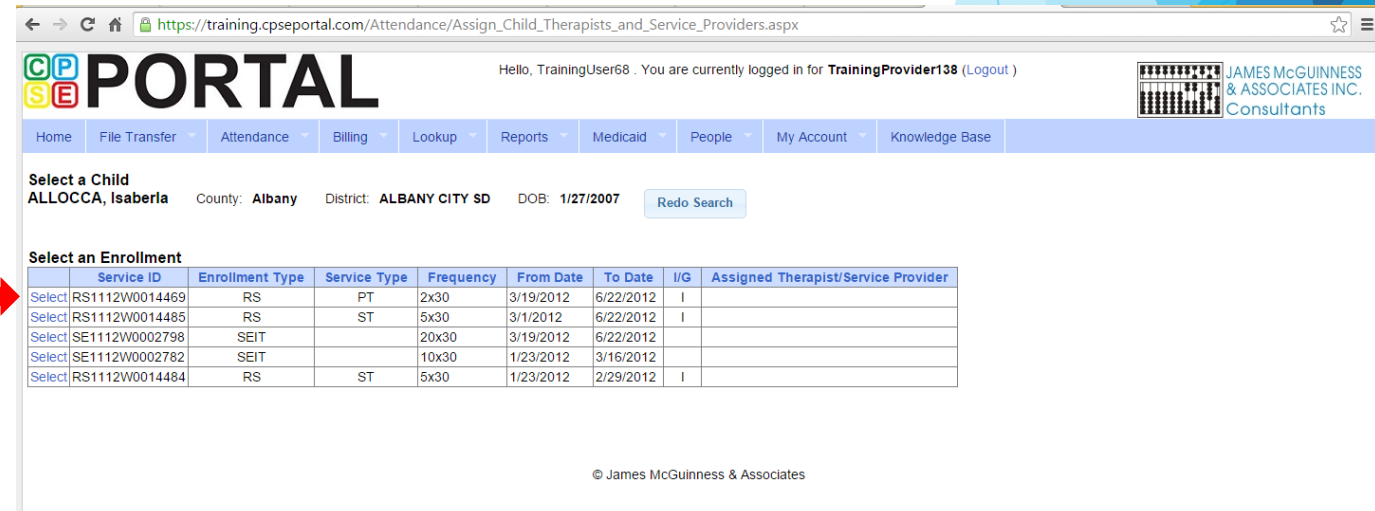
Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Select a Child

Last Name:  Search [Show Advanced Search options]

	Last Name	First Name	DOB	SED STAC ID	District	County
Select	ALLOCA	Trysten	10/17/2009	E44333	ALBANY CITY SD	Albany
Select	ALLOCCA	Isaberla	1/27/2007	D54522	ALBANY CITY SD	Albany

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CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for **TrainingProvider138** (Logout)

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Select a Child

**ALLOCCA, Isaberla** County: **Albany** District: **ALBANY CITY SD** DOB: **1/27/2007** Redo Search

Select an Enrollment

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

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# Assigning Therapists to Children

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

**Select a Child**  
ALLOCCA, Isabella County: Albany District: ALBANY CITY SD DOB: 1/27/2007 [Redo Search](#)

**Select an Enrollment**

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

**Assigned Therapists**

	Last Name	First Name	NPI
<input type="checkbox"/>	ADONRI	Cordelle	1326290289
<input type="checkbox"/>	ALFARO	Oluwafolakemi Adebosipo	1497907604

**Available Therapists**

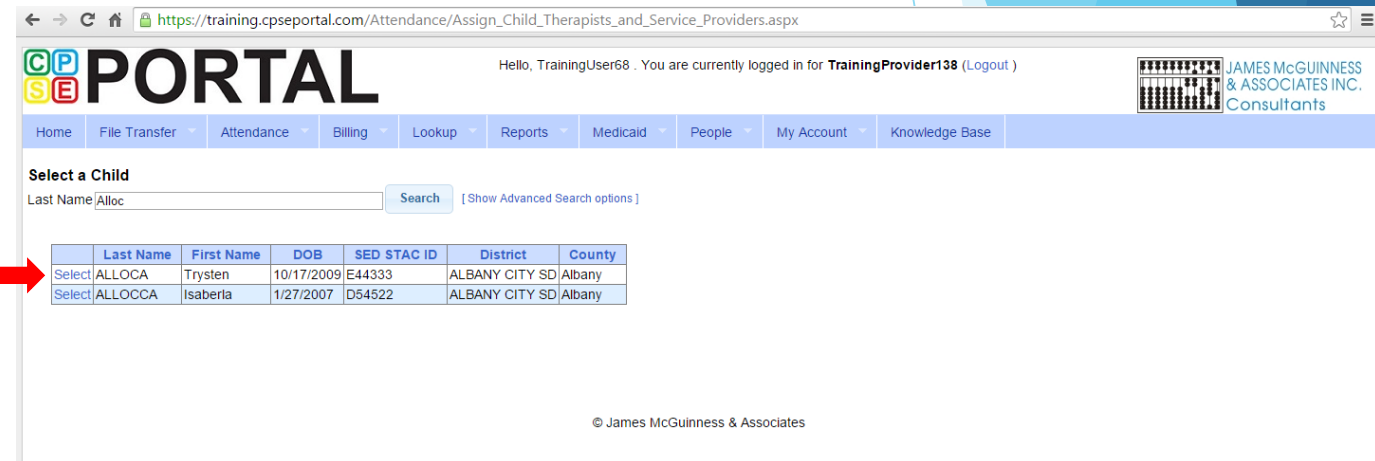
	Last Name	First Name	NPI
<input checked="" type="checkbox"/>	AFONSO	Yaurdin	176074476
<input type="checkbox"/>	AMALFITANO	Mechel	128588857
<input type="checkbox"/>	ARISTILDE	Mayana	
<input type="checkbox"/>	AUER	Lydia Nicole	
<input type="checkbox"/>	BARKET	Leisha	157881310
<input type="checkbox"/>	BARKOFF	Ean	179003880
<input type="checkbox"/>	BENCAL	Cheikhouna	
<input type="checkbox"/>	BHASIN	Daniel David	197285941
<input type="checkbox"/>	BODNER	Wakuv	147779985
<input type="checkbox"/>	BOTTJER	Eudasia	160901297
<input type="checkbox"/>	BOWEN	Rachel Hope	
<input type="checkbox"/>	BUCKLEY	William	

[Remove Therapist](#) [Add Therapist\(s\)/Service Provider\(s\)](#)

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# Assigning SEIT Teacher to Children

- ❖ Caseload Maintenance > Assign Child's Therapist(s) and Service Provider(s)
- ❖ Search for a child and select the child you are working on
- ❖ Select the SEIT enrollment



CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for **TrainingProvider138** (Logout)

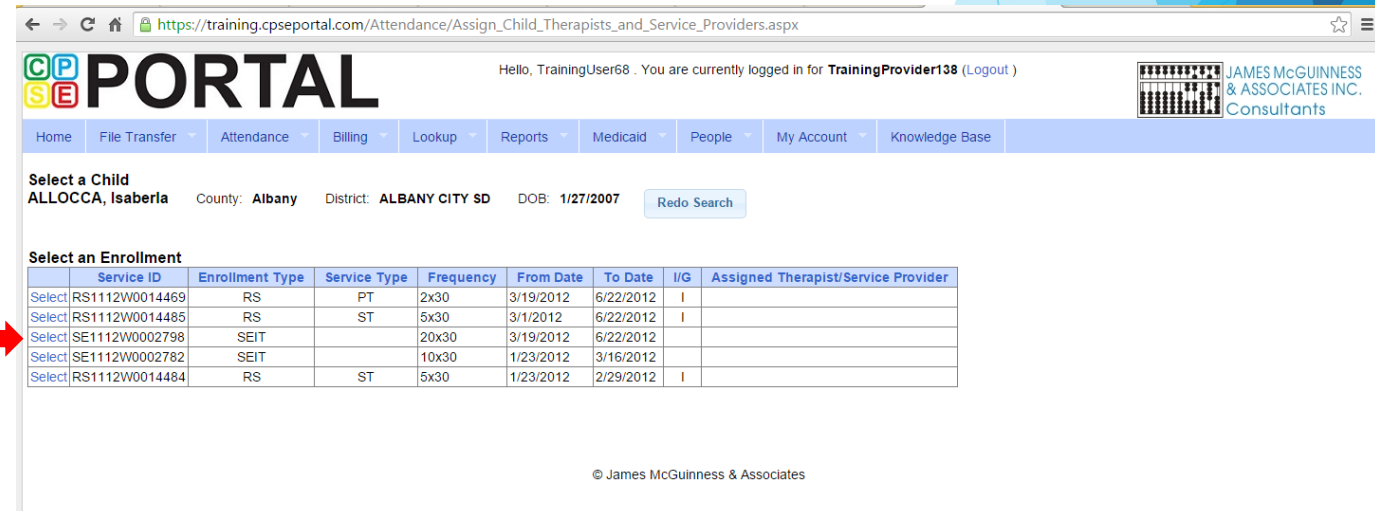
Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Select a Child

Last Name:  Alloc Search [Show Advanced Search options]

	Last Name	First Name	DOB	SED STAC ID	District	County
Select	ALLOCA	Trysten	10/17/2009	E44333	ALBANY CITY SD	Albany
Select	ALLOCCA	Isaberla	1/27/2007	D54522	ALBANY CITY SD	Albany

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CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for **TrainingProvider138** (Logout)

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Select a Child

**ALLOCCA, Isaberla** County: **Albany** District: **ALBANY CITY SD** DOB: **1/27/2007** Redo Search

Select an Enrollment

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

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# Assigning SEIT Teacher To Children

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

The screenshot shows the CPSE Portal interface for assigning therapists. The browser address bar displays [https://training.cpseportal.com/Attendance/Assign\\_Child\\_Therapists\\_and\\_Service\\_Providers.aspx](https://training.cpseportal.com/Attendance/Assign_Child_Therapists_and_Service_Providers.aspx). The page title is "Assign Child's 1". The "Select a Child" section shows "ALLOCCA, Isaberta" with County: Albany, District: ALBANY CITY SD, and DOB: 1/27/2007. A "Redo Search" button is present. The "Select an Enrollment" table lists several enrollments with columns: Select, Service ID, Enrollment Type, Service Type, Frequency, From Date, To Date, I/G, and Assigned Therapist/Service Provider. The "Assigned Therapists" table lists two therapists: ADONRI, Cordelle (NPI: 1326290289) and ALFARO, Oluwafolakemi Adebosipo (NPI: 1497907604). The "Available Therapists" table lists ten therapists, with AFONSO, Yaurdin (NPI: 176074476) selected. A red arrow points to the "Remove Therapist" button, and a green arrow points to the "Add Therapist(s)/Service Provider(s)" button. The footer text is "© James McGuinness & Associates".

**Select a Child**  
ALLOCCA, Isaberta County: Albany District: ALBANY CITY SD DOB: 1/27/2007 Redo Search

**Select an Enrollment**

Select	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

**Assigned Therapists**

Last Name	First Name	NPI
ADONRI	Cordelle	1326290289
ALFARO	Oluwafolakemi Adebosipo	1497907604

**Available Therapists**

Last Name	First Name	NPI	
<input checked="" type="checkbox"/>	AFONSO	Yaurdin	176074476
<input type="checkbox"/>	AMALFITANO	Mechel	128588857
<input type="checkbox"/>	ARISTILDE	Mayana	
<input type="checkbox"/>	AUER	Lydia Nicole	
<input type="checkbox"/>	BARKET	Leisha	157881310
<input type="checkbox"/>	BARKOFF	Ean	179003880
<input type="checkbox"/>	BENCAL	Cheikhouna	
<input type="checkbox"/>	BHASIN	Daniel David	197285941
<input type="checkbox"/>	BODNER	Wakuv	147779985
<input type="checkbox"/>	BOTTJER	Eudasia	160901297
<input type="checkbox"/>	BOWEN	Rachel Hope	
<input type="checkbox"/>	BUCKLEY	William	

**Remove Therapist**

**Add Therapist(s)/Service Provider(s)**

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# View Unmatched Enrollments

- ❖ Go to Caseload Maintenance > View Unmatched Enrollments
- ❖ Use this report to match children and enrollments or to delete an unmatched enrollment.

Home	File Transfer	Activities	eSTACs	Attendance	Billing	Caseload Maintenance	Lookup	Reports	Medicaid	People	My Account	Knowledge Base
<b>Unmatched Enrollments</b>												
Retrieve												
County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description			
WESTCHESTER	TRAMONTOZZI	LUKE	12/23/13	201718	02/26/18	06/22/18	RS	ST	1x45	Attendances		Attempt Enrollment Match <a href="#">Delete</a>
WESTCHESTER	Weintraub	Shoshana	02/26/16	201920	09/03/19	06/26/20	RS	ST	2x45	Attendances	Attempt Child Match	<a href="#">Delete</a>

# Matching Children

- ❖ Billing cannot be submitted to the County on “Unmatched” children/enrollments. They can only be submitted for County created enrollments
- ❖ In order to address this, you need to “Match” the temporary/placeholder entry to a County created one and then the data will be merged into the County created entry
- ❖ You can “Attempt Match” from Unmatched Children screen

## Unmatched Children

Add Child

Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone				
BLUM	MERIL		3/24/2012	ERIE	Frontier			NY			Enrollments	Attempt Match	Edit	Delete

- ❖ Or Attempt Child Match from 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

# Matching Children

## Match Child Against County-Imported Child

### Current Unmatched Child:

BLUM, MERIL County: ERIE District: Frontier DOB: 3/24/2012

### Potential Matches:

DOB To Match 3/24/2012

Search

Showing children matching the DOB, and with the same first 3 letters ("BLU") in their last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	BLUM	MERYL		3/24/2012	ERIE	Frontier	2250 STATE RTE 32		NY		

- ❖ The top of the screen will show the information you entered for the child
- ❖ The bottom shows the potential matches
- ❖ You can alter potential match search criteria for DOB and First ? letters of their last name
- ❖ **Make sure the child you are selecting to match is the correct one** and click select

# Confirming your Child Match

- ❖ Click Select to choose the Count created child that matches your agency entered child.
- ❖ 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

Showing children matching the DOB, and with the same first 3 letters ("BLU") in their last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	BLUM	MERYL		3/24/2012	ERIE	Frontier	2250 STATE RTE 32		NY		

**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.**

BLUM, MERIL (3/24/2012)



BLUM, MERYL (3/24/2012)

Match!

# Matching Enrollments

- ❖ 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 child is an Unmatched child (agency created) you can Attempt Child Match
- ❖ If the enrollment has potential matches (same child and service type), the “Attempt Enrollment Match” link appears

# Matching Enrollments to County Created Entries

- ❖ The top of the screen shows the agency created enrollment information
- ❖ The bottom shows a list of potential matches based on service type only (doesn't check dates)
- ❖ If you can find a County created match, click Select

## Match Enrollment Against County-Imported Enrollment

Child:  
**SHELDON, NEAL** County: **ERIE** District: **Orchard Park** DOB: **7/22/2011**

Current Unmatched Enrollment:  
Session: **2015 - 2016 Winter** From Date: **3/30/2016** To Date: **6/24/2016**  
Enrollment Type: **RS** Service Type: **ST** Individual or Group: **I** Frequency: **1x30**

### Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2015 - 2016 Winter	9/1/2015	6/30/2016	I	2x30	RS1516W0081795

# Confirm Enrollment Match

- ❖ When you select an enrollment to Match, you will be prompted to confirm the information.
- ❖ Double check the information is correct.
- ❖ If it is correct, click Match

## Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2015 - 2016 Winter	9/1/2015	6/30/2016	I	2x30	RS1516W0081795

**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  
(3/30/2016 - 6/24/2016)  
1x30



RS1516W0081795  
(9/1/2015 - 6/30/2016)  
2x30

Match!

# Questions?



# Enrollment Lookup Report

- ❖ A report of all enrollments
- ❖ Lookup > Enrollment Lookup



- ❖ Choose filters, and click Search

**Enrollments**

2015 - 2016 Winter ▾ ERIE ▾ ☐ CBRS ☒ RS ☐ SEIT ☐ CB

HIGHER LEARNING, LLC ▾

Status	ESID	Last Name	First Name	County	Provider	District	Enrollment Type	RS Type	Start	End	Frequency	Individual Or Group	Rate	
	RS1516W0060337	ABBOTT	NEDRA	ERIE	HIGHER LEARNING, LLC	Depew	RS	ST	9/1/2015	6/30/2016	2x30	I	50.0000	Attendances
	RS1516W0079785	ADAIR	LURLINE	ERIE	HIGHER LEARNING, LLC	Buffalo	RS	ST	9/1/2015	6/30/2016	2x30	I	50.0000	Attendances
	RS1516W0079784	ADDISON	ROBT	ERIE	HIGHER LEARNING, LLC	Buffalo	RS	ST	9/1/2015	4/15/2016	2x30	I	50.0000	Attendances
UnMatched		AYERS	EARLENE	ERIE	HIGHER LEARNING, LLC	Buffalo	RS	ST	2/2/2016	6/30/2016	2x30	I	0.0000	Attendances
	RS1516W0079754	BARNHART	LEATRICE	ERIE	HIGHER LEARNING, LLC	Ken/Ton	RS	ST	9/1/2015	9/8/2015	3x30	I	50.0000	Attendances
	RS1516W0079653	BATEMAN	RIGOBERTO	ERIE	HIGHER LEARNING, LLC	Eden	RS	ST	9/1/2015	6/30/2016	2x30	I	50.0000	Attendances

# Enrollment Lookup Report

- ❖ Can use 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

## Enrollments

School Year Session 2019 - 2020 Winter County DUTCHESS

☐ CBRs

Provider LG INTERVENTION SPECIALISTS, INC.

☒ RS

☐ SEIT

☐ CB

Status	ESID	Last Name	First Name	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	
UnMatched		ALDRICH	PORFIRIO	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Wappingers	RS	ST	9/9/2019	6/26/2020	2x30	I			0.00	0.00	39	41	Attendances
	RS1920W0023200	ALDRICH	PORFIRIO	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Wappingers	RS	ST1	9/9/2019	6/26/2020	3x60	G	9200-2		70.00	0.00	39	41	Attendances
	RS1920W0023296	ARIAS	EARNESTINE	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Poughkeepsie	RS	ST	10/7/2019	6/26/2020	2x30	I	9200-2		60.00	0.00	36	37	Attendances
	RS1920W0023221	AVILES	THERON	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Hyde Park	RS	OT	9/9/2019	6/26/2020	1x30	I	9200-2		60.00	0.00	39	41	Attendances
	RS1920W0023222	AVILES	THERON	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Hyde Park	RS	PT	9/9/2019	6/26/2020	1x30	I	9200-2		60.00	0.00	39	41	Attendances
	RS1920W0023280	AVILES	THERON	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Hyde Park	RS	ST	9/9/2019	10/16/2019	2x30	I	9200-2		60.00	0.00	6	5	Attendances
	RS1920W0023238	BERGMAN	JOSEF	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Rhinebeck	RS	PT	9/9/2019	6/26/2020	2x30	I	9200-2		60.00	0.00	39	41	Attendances
	RS1920W0023224	BIGGS	BORIS	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Wappingers	RS	ST1	9/9/2019	6/26/2020	3x60	G	9200-2		70.00	0.00	39	41	Attendances
	RS1920W0023208	BOYER	BILLY	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Wappingers	RS	ST1	9/9/2019	6/26/2020	3x60	G	9200-2		70.00	0.00	39	41	Attendances

# How to find an ESID

- ❖ Use Child Lookup to view enrollments for a child

View Information for School Year: 2015 - 2016 ▾

Enrollments


Status	School Year	From	To	ESID	Provider	Enrollment	Service	Frequency
	2015 - 2016 Winter	12/1/2015	6/30/2016	RS1516W0082349	HIGHER LEARNING, LLC	RS	ST	4x30
	2015 - 2016 Winter	10/21/2015	11/30/2015	RS1516W0081747	HIGHER LEARNING, LLC	RS	ST	3x30

- ❖ Use Enrollment Lookup to view List

**Enrollments**

2015 - 2016 Winter    ERIE    ☐ CBRS    Search

HIGHER LEARNING, LLC    ☒ RS    ☐ SEIT    ☐ CB



Status	ESID	Last Name	First Name	County	Provider	District	Enrollment Type	RS Type	Start	End	Frequency	Individual Or Group	Rate	
	RS1516W0080337	ABBOTT	NEDRA	ERIE	HIGHER LEARNING, LLC	Depew	RS	ST	9/1/2015	6/30/2016	2x30	I	50.0000	<a href="#">Attendances</a>
	RS1516W0079786	ADAIR	LURLINE	ERIE	HIGHER LEARNING, LLC	Buffalo	RS	ST	9/1/2015	6/30/2016	2x30	I	50.0000	<a href="#">Attendances</a>
	RS1516W0079784	ADDISON	ROBT	ERIE	HIGHER LEARNING, LLC	Buffalo	RS	ST	9/1/2015	4/15/2016	2x30	I	50.0000	<a href="#">Attendances</a>
UnMatched		AYERS	EARLENE	ERIE	HIGHER LEARNING, LLC	Buffalo	RS	ST	2/2/2016	6/30/2016	2x30	I	0.0000	<a href="#">Attendances</a>
	RS1516W0079754	BARNHART	LEATRICE	ERIE	HIGHER LEARNING, LLC	Ken/Ton	RS	ST	9/1/2015	9/8/2015	3x30	I	50.0000	<a href="#">Attendances</a>
	RS1516W0079653	BATEMAN	RIGOBERTO	ERIE	HIGHER LEARNING, LLC	Eden	RS	ST	9/1/2015	6/30/2016	2x30	I	50.0000	<a href="#">Attendances</a>

Excel

# Enrollment Assignments Report

- ❖ Easy way to access child enrollment information
- ❖ Can also assign or remove therapists from assignment
- ❖ Reports > Enrollment Assignments
- ❖ Search by School Year or Provider and click Retrieve

## Enrollment Assignments

Filters

School Year: 2014 - 2015 Winter Provider:  ☒ Missing Assignments Only Retrieve

ce Lookup Reports Medicaid People

- Voucher Listings
- Billed Items
- Remittance Batch Details
- Session Listing
- Therapist Activity
- Enrollment Listing
- Child Treatment Log
- Classroom Attendance
- Enrollment Assignments
- Rendering Provider Attestations
- View Child Activities by Therapist
- Enrollments Without Attendance
- Enrollments Uploaded By County

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# Enrollment Assignments Report

- ❖ Find the child you need and click “Edit Assignment”
- ❖ Select the enrollment
- ❖ Add or Remove therapists as needed

## Enrollment Assignments

Filters

School Year: 2014 - 2015 Winter Provider:  ☒ Missing Assignments Only Retrieve

Last Name	First Name	Electronic Service ID	Related Service Code	Provider	County	District	Therapist Last Name	Therapist First Name	Frequency	Individual Or Group	
			ST		SCHENECTADY	Burnt Hills- Ballston Lake			6x30		<a href="#">Edit Assignment</a>
			PLA		Albany	ALBANY CITY SD			1x30	I	<a href="#">Edit Assignment</a>
			ST		Albany	ALBANY CITY SD			1x30	I	<a href="#">Edit Assignment</a>
			PSY		Albany	ALBANY CITY SD			2x30	G	<a href="#">Edit Assignment</a>
			ST		Albany	ALBANY CITY SD			1x30	G	<a href="#">Edit Assignment</a>
			ST		Albany	North Colonie 0809			1x30	G	<a href="#">Edit Assignment</a>

Maintaining Us: x Service Provider: x www.oms.nyse: x Product Backlog: x Portal - CPSEP: x Migrating To A: x Login Success: x Assign Child's: x Sia - Elastic: x David

https://training.cpseportal.com/Attendance/Assign\_Child\_Therapists\_and\_Service\_Providers.aspx

Select a Child  
ALLOCCA, Isabella County: Albany District: ALBANY CITY SD DOB: 1/27/2007 Redo Search

Select an Enrollment

Select	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

Assigned Therapists

Last Name	First Name	NPI
<input type="checkbox"/> ADONRI	Cordelle	1326290289
<input type="checkbox"/> ALFARO	Oluwafolake Adebosipo	1497907604

Remove Therapist

Available Therapists

Last Name	First Name	NPI
<input checked="" type="checkbox"/> AFONSO	Yaurdin	176074476
<input type="checkbox"/> AMALFITANO	Mechel	128588857
<input type="checkbox"/> ARISTILDE	Mayana	
<input type="checkbox"/> AUER	Lydia Nicole	
<input type="checkbox"/> BARKET	Leisha	157881310
<input type="checkbox"/> BARKOFF	Ean	179003880
<input type="checkbox"/> BENCAL	Cheikhouna	
<input type="checkbox"/> BHASIN	Daniel David	197285941
<input type="checkbox"/> BODNER	Wakuv	147779985
<input type="checkbox"/> BOTTJER	Eudasia	160901297
<input type="checkbox"/> BOWEN	Rachel Hope	
<input type="checkbox"/> BUCKLEY	William	

Add Therapist(s)/Service Provider(s)

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## Important Note:

- ❖ If you do not match your enrollments, you cannot bill for those services

# Follow-Up

- ❖ This presentation will be recorded and the PowerPoint presentation will be uploaded to the Portal Knowledge Base for future reference.
- ❖ Helpful Knowledge Base Articles:
  - ❖ Articles on Unmatched Children/Enrollments:  
<http://support.cpseportal.com/kb/c11/enrollments.aspx>
  - ❖ Assigning Children to Therapist(s)/Service Provider(s) (including teachers):  
<http://support.cpseportal.com/kb/a34/assign-children-to-therapist.aspx>
  - ❖ How to look up a child by ESID:  
<http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid-.aspx>
- ❖ Email the CPSE Portal Support Team: [support@CPSEPortal.com](mailto:support@CPSEPortal.com)

# Upcoming Webinars

- ▶ Center-Based Set-Up & Attendance (CB Agencies)
  - ▶ 5/11 @ 2:30pm <https://attendee.gotowebinar.com/register/4110703854729869072>
  - ▶ 5/12 @ 11:00 am <https://attendee.gotowebinar.com/register/6279629078983146768>
- ▶ Case Management (Independents)
  - ▶ 5/18 @ 2:30 pm <https://attendee.gotowebinar.com/register/20733904658987792>
  - ▶ 5/19 @ 11:00 am <https://attendee.gotowebinar.com/register/3296188939408361744>
- ▶ Case Management (Agency Service Providers)
  - ▶ 5/25 @ 2:30 pm <https://attendee.gotowebinar.com/register/1866210295811328272>
  - ▶ 5/26 @ 11:00 am <https://attendee.gotowebinar.com/register/1710046659318322960>