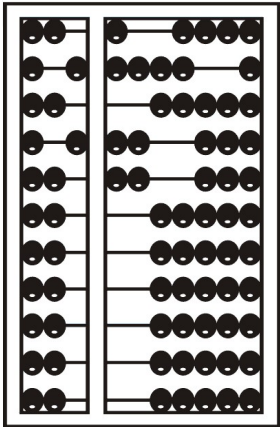


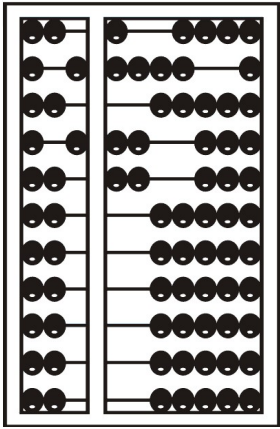
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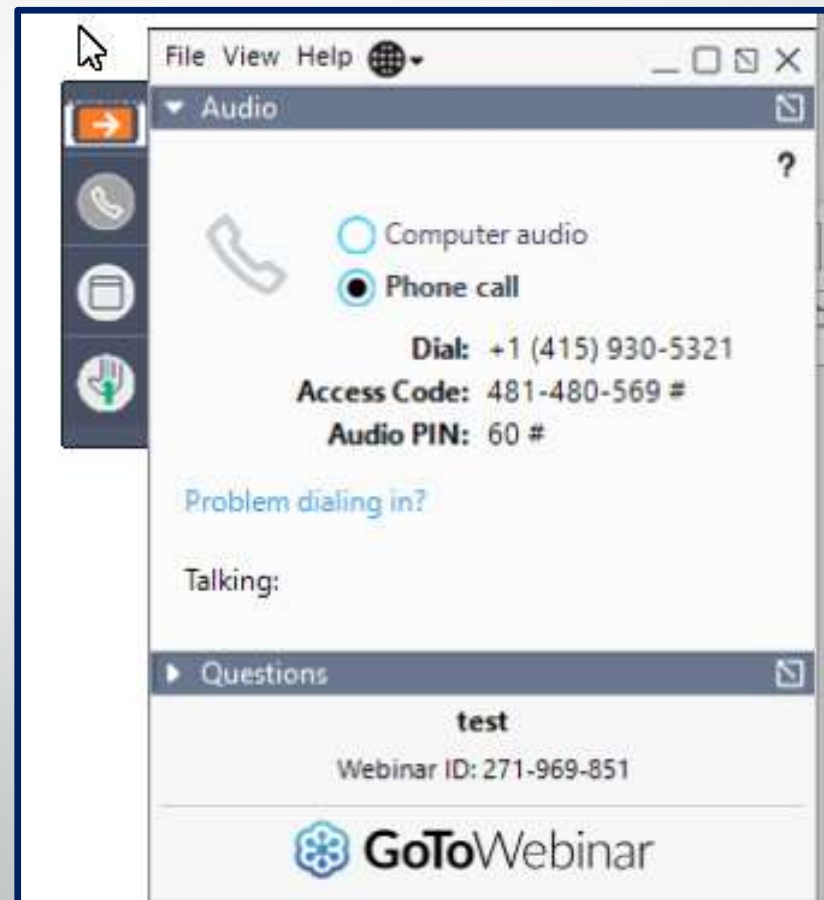
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Go To Webinar Control Panel

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

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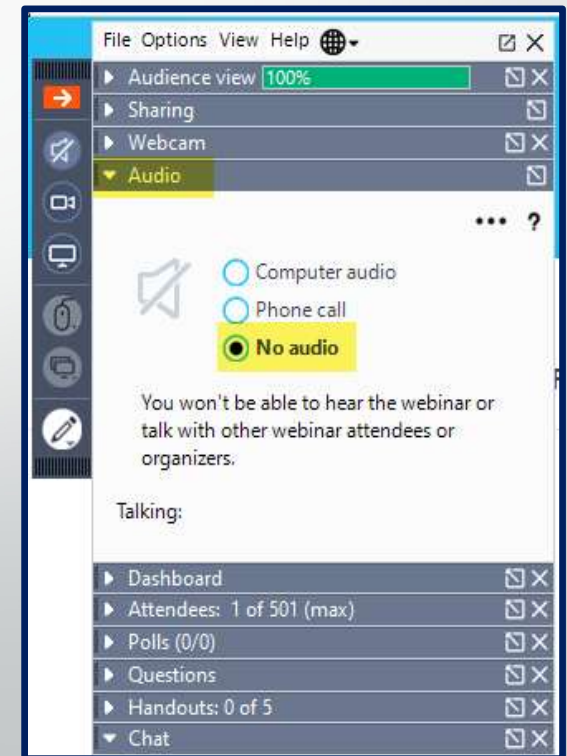
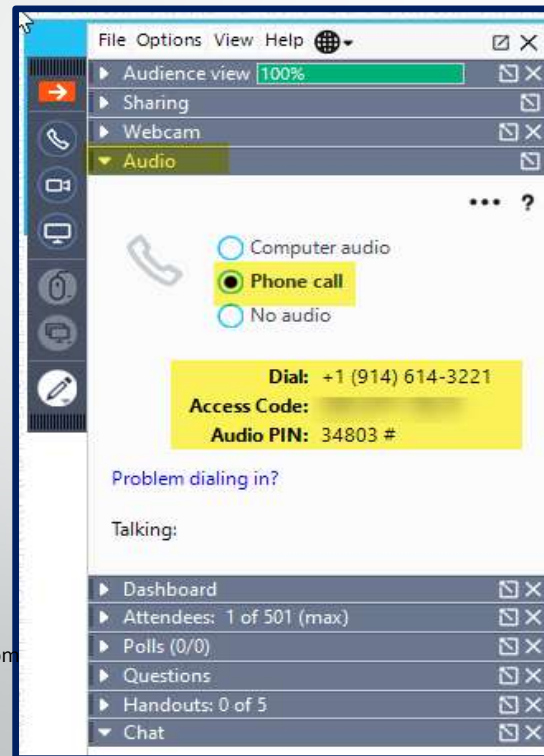
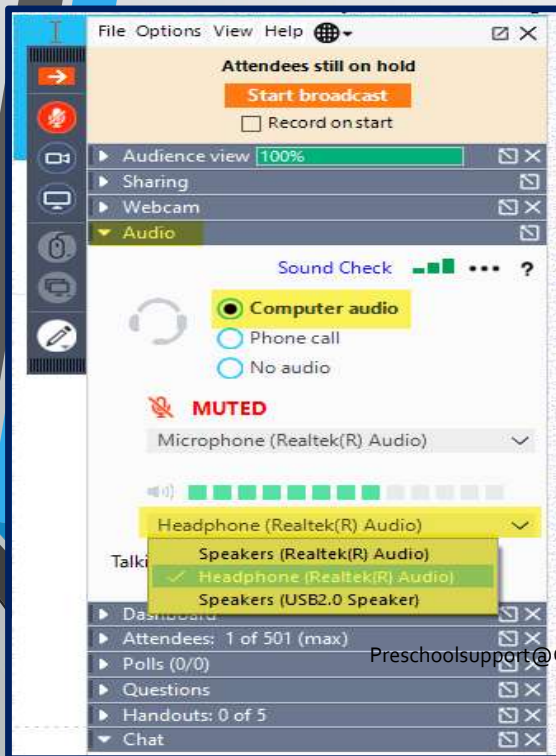


Communicating with Presenter

- All participants are on mute.
- 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.

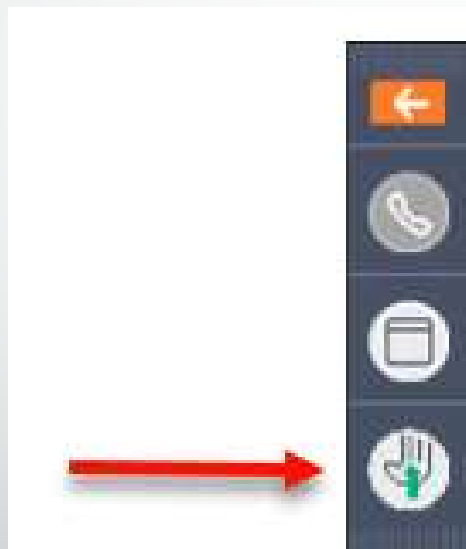
Can't Hear the Webinar?

- 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!



Raising your hand

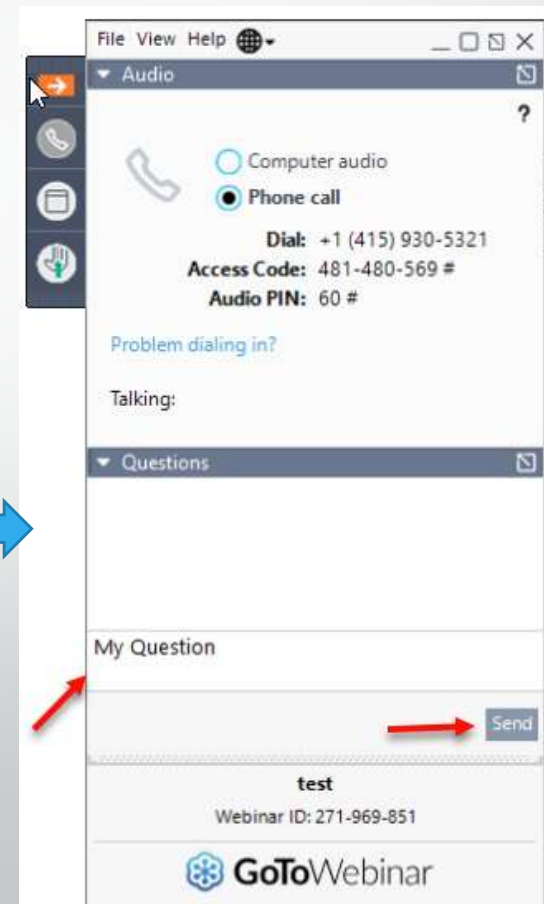
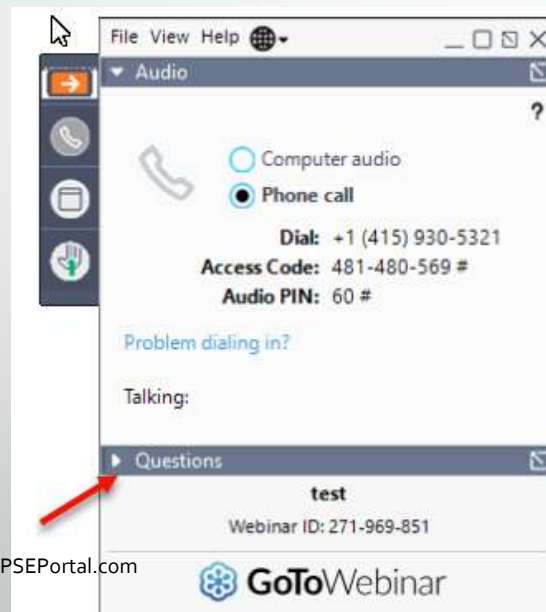
- On bottom left of control panel is a button with a hand icon.
- Click that button to raise your hand.



Typing in a Question

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

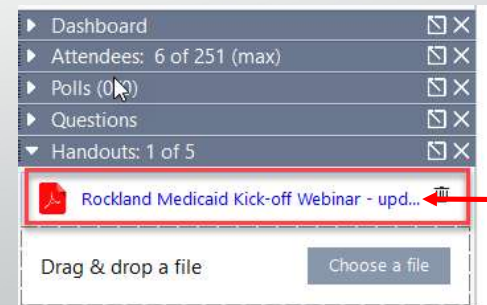
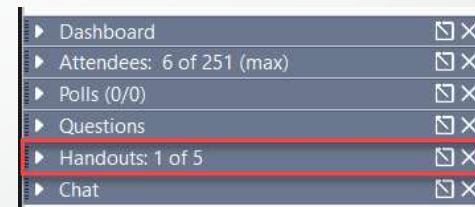
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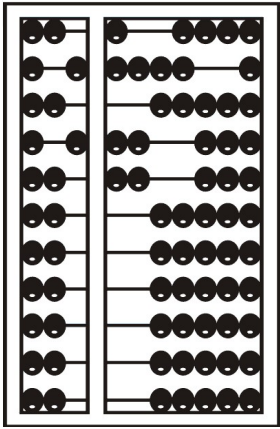
Handouts

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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Preschool Webinar – Unclaimed Payments

Preschoolsupport@CPSEPortal.com



PHI Disclaimer:

All Child information displayed in this webinar are from
scrambled Preschool Databases.

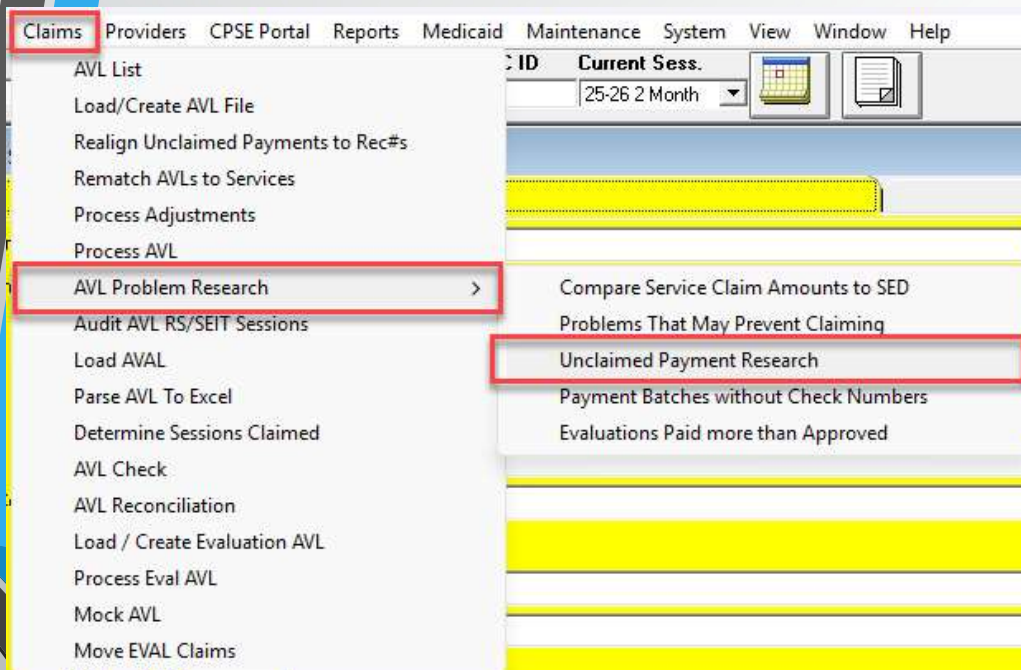
No real child information will be displayed.

Unclaimed Payments

- Reviewing and resolving unclaimed payments is an important and necessary step for all counties to review items not yet claimed on an AVL.
- These are funds that the county has paid to providers but not yet claimed reimbursement for due to problems preventing claiming.

Payables Amount by Batch	\$19,834,173.65
Payables Amount by Claim Date	\$19,834,173.65
Unclaimed Payments	\$3,523,035.08
Total Paid	\$64,503,090.89
Total Claimed	\$60,980,055.81

Unclaimed Payments cont.



- Unclaimed payments can be reviewed anytime. You do not need to be processing an AVL to view.
- Claims>>AVL Problem Research>> Unclaimed Payment Research

Unclaimed Payments cont.

AVL Problem Research

School Year:

☒ All Payments
☐ Only Payments Through

Problem Type Filter
☒ All Rows
☐ Only rows where Potential Problem is not blank
☐ Only rows where Potential Problem is

Enrollment Type Filter
☒ All Enrollment Types
☐ Single Enrollment Type

Provider Filter
☒ All Providers
☐ Single Provider

Last Name	First Name	DOB	Type	ESID	Provider	Prog	From	To	SED Type	Rec#	Potential Problem
ACOSTA	TOBY	12/30/21	RS	RS2425W0136143	BAKER VICTORY	9200-2	11/02/24	05/05/25	ST	01	Payment exists for month outside S
BAUER	IRA	06/13/19	CB	CB2425S0055093	GATEWAY	9100-A	07/11/24	08/21/24	EDUC	01	
BELL	YVETTE	06/26/20	CB	CB2425W0054484	ASPIRE OF WESTERN	9160-I	09/04/24	04/03/25	EDUC	01	
BURTON	SERGIO	03/01/20	CB	CB2425S0055101	GATEWAY	9100-A	07/11/24	08/21/24	EDUC	01	
BURTON	SERGIO	03/01/20	CB	CB2425W0055901	GATEWAY	9100-I	09/04/24	11/24/24	EDUC	02	
BURTON	SERGIO	03/01/20	CB	CB2425W0056113	GATEWAY	9100-I	11/25/24	06/25/25	EDUC	03	
CARLSON	BECKY	03/05/21	RS	RS2425W0134005	BAKER VICTORY	9200-2	09/01/24	12/20/24	CDR	01	Payment exist for months outside e
CARLSON	BECKY	03/05/21	RS	RS2425W0134006	THERAPEUTIC LINK	9200-2	09/01/24	12/20/24	OT	01	Payment exist for months outside e
CHANDLER	ANN	03/03/19	CB	CB2425S0055212	GATEWAY	9100-A	07/11/24	08/21/24	EDUC	01	
CHEN	PEDRO	09/16/19	CB	CB2425S0055196	KENMORE-TONAWANDA	9160-A	07/31/24	08/16/24	EDUC	01	
COLE	JUDY	03/09/20	CB	CB2425S0054779	GATEWAY	9100-A	07/11/24	08/21/24	EDUC	02	
COLE	JUDY	03/09/20	CB	CB2425W0055227	GATEWAY	9100-I	09/04/24	06/03/25	EDUC	01	
COLE	JUDY	03/09/20	CB	CB2425W0057055	GATEWAY	9100-I	06/04/25	06/25/25	EDUC	03	
CORTEZ	RICHARD	10/28/19	CB	CB2425S0054991	GATEWAY	9100-A	07/11/24	08/21/24	EDUC	02	
CRAIG	KEITH	01/08/19	CB	CB2425S0054778	GATEWAY	9100-A	07/11/24	08/21/24	EDUC	01	
DAVIS	JEREMY	03/28/20	SEIT	SE2425W0019547	ECMC	9135-T	10/28/24	01/28/25	EDUC	01	
ERICKSON	EDMUND	01/15/20	CB	CB2425W0056223	GATEWAY	9100-I	05/12/25	06/25/25	EDUC	02	
FITZGERALD	GAIL	05/01/21	CB	CB2425W0055823	ASPIRE OF WESTERN	9161-I	09/04/24	01/22/25	EDUC	01	
FITZGERALD	GAIL	05/01/21	CB	CB2425W0056220	ASPIRE OF WESTERN	9161-I	01/23/25	06/20/25	EDUC	02	
FLEMING	CONSTANCE	08/23/20	SEIT	SE2425W0018811	HEARING AND SPEECH	9135-T	04/22/25	06/28/25			
GIBBS	CASSANDRA	06/29/21	PTRANS	TR2425W0070982	DONNELLA BARNES	-	01/01/25	06/26/25	TRAN	01	

- From this screen, select the school year session, and click "Retrieve".
- This will populate a list of all unclaimed payments for that school year.
- Some of these items will of nothing listed under "Potential Problem". This just means they are not yet claimed, and do not have a problem preventing them from being claimed.
- This list can also be sorted, filtered by potential problem, and exported to excel.



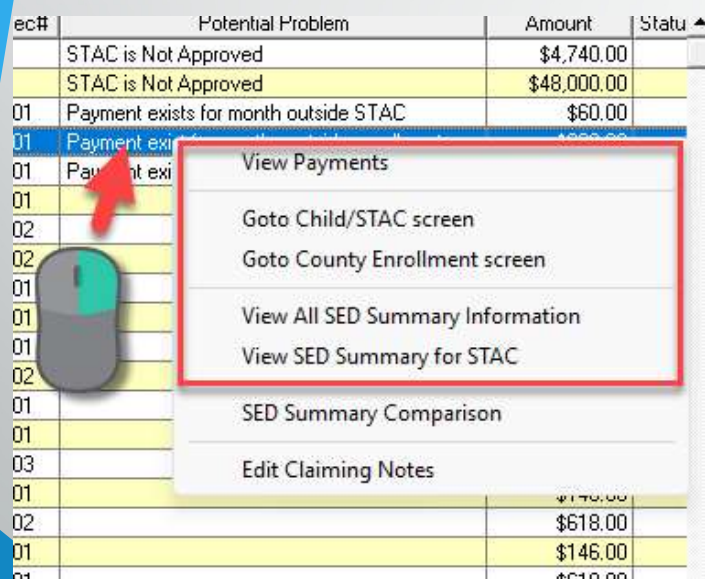
STAC Not Marked OK to Transmit

STAC Not Marked OK to Transmit

- This originates from a STAC that has not been marked to send to SED for approval.
- This can also be from a STAC marked as “Paper” as the transmission method **AND** it is not approved; once approved this will drop off.

	Last Name	First Name	DOB	Type	ESID	Provider	Prog	From	To	SED Type	Rec	Potential Problem
▶	ACOSTA	CEDRIC	08/08/19	CB	CB2324W0059279	ARC ERIE COUNTY NY -	9100-J	09/06/23	06/21/24			STAC not marked OK to Transmit
	PIERCE	ERNESTO	03/28/19	RS	RS2324W0128772	HEARING AND SPEECH	9200-2	12/21/23	04/25/24	CONF	02	Payment exist for months outside of

Pulling up the Child/STAC screen from the Unclaimed Payments Window



ec#	Potential Problem	Amount	Statu
	STAC is Not Approved	\$4,740.00	
	STAC is Not Approved	\$48,000.00	
01	Payment exists for month outside STAC	\$60.00	
01	Payment exists for month outside STAC	\$60.00	
01	Payment exists for month outside STAC	\$60.00	
02			
02			
01			
01			
01			
02			
01			
01			
03			
01		\$175.00	
02		\$618.00	
01		\$146.00	
01		\$618.00	

- By right clicking on the enrollment – you can quickly jump to several screens within Preschool to review the information and find the source of the problem
- This includes the Payment List, Child/STAC Screen, Enrollment Screen, the SED Summary, and the STAC screen.
- For all our examples we are going to review everything from the Child/STAC Info Screen.

Resolution

Child & STAC Maintenance

Child

STACs

Type	Session	District	Rejected	Last Sent	Last Appl'd	Rec'd	Year	SED/Stack	X/M	Dual/STAC	Force	OK to Send	Status
SEIT	24-25 2 Month	Iroquois		11/7/2024	11/4/2024	01	202425	K84988	ELECTRONIC			☒	
CB	23-24 10 Month	Iroquois					202324	K84988	ELECTRONIC			☒	
EVAL		Iroquois		9/26/2023	10/3/2023	01		K84988					
SEIT	23-24 10 Month	Iroquois		2/13/2024	2/15/2024	01	202324	K84988	ELECTRONIC			☒	

STAC Details

District: Iroquois

Multiple Service STAC: ☐

Provider for Special Class, SCIS or SEIT: ARC ERIE COUNTY NY - GREEN ACRES

Is this the same provider that conducted the most recent evaluation for this student? ☐ Yes ☒ No ☐ N/A

Transmission Method: ☒ Electronic ☐ Paper

☒ OK To Transmit ☐ Force Resend

SED Identifying Information: SED STAC ID: K84988, School Year: 202324, Record Number:

Rejection Information: Last Reject Date: MM/DD/YY, ☒ Problem Has Been Fixed

Notes:

Buttons: Withdraw, OK, Cancel, Apply

Main Window Buttons: New, Apply, Delete, Details

- To correct this, first navigate to the Child/STAC Info Screen for the child
- Find the STAC not marked "OK to Send", Click "Details", and then the "OK to Transmit" box

Also be sure to check the transmission method.
Paper STACs may also display this error if they have
not yet been marked as approved.

	Type	Session	District	Rejected	Last Sent	Last Appr'd	Rec#	Year	SEDStac#	X-Mit	DualSTAC	Force	OKToSend	Status
▶	SEIT	24-25 2 Month	Iroquois		11/1/2024	11/4/2024	01	202425	K84988	ELECTRONIC	☐	☐	☒	
	CB	23-24 10 Month	Iroquois					202324	K84988	PAPER	☐	☐	☐	
	EVAL		Iroquois		9/26/2023	10/3/2023	01		K84988		☐	☐	☐	
	SEIT	23-24 10 Month	Iroquois		2/13/2024	2/15/2024	01	202324	K84988	ELECTRONIC	☐	☐	☒	



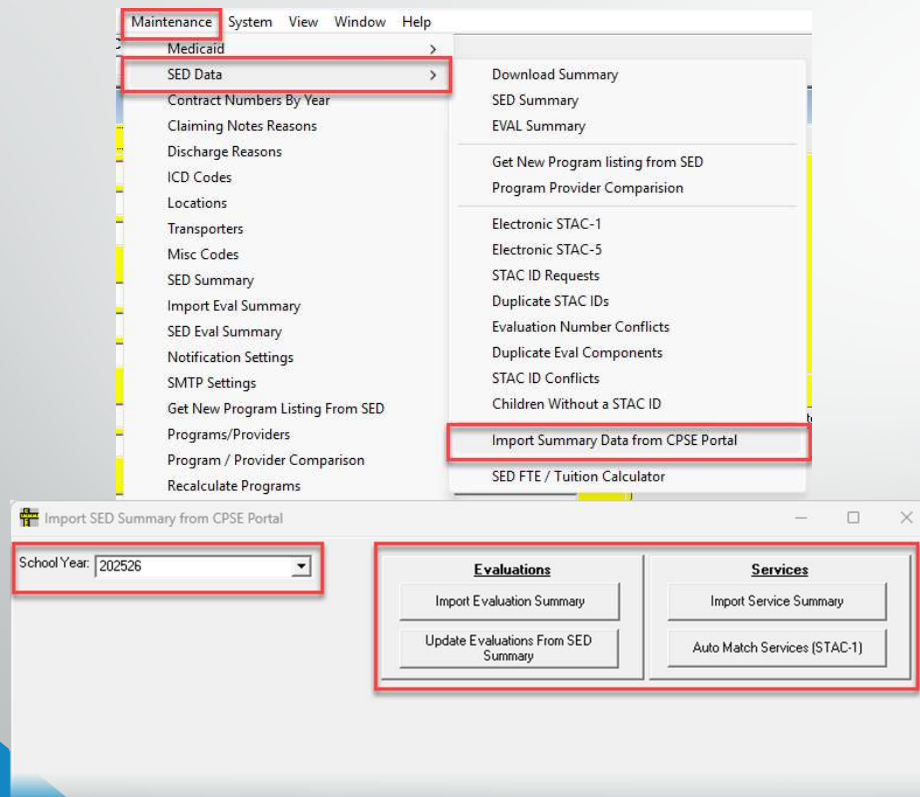
STAC Not Approved

STAC Not Approved

- SED has not yet approved the STAC likely due to a rejection, or not yet being sent to SED.

Last Name	First Name	DOB	Type	ESID	Provider	Prog	From	To	SED Type	Rec#	Potential Problem
HARKONNEN	FEYD	03/25/21	RS	RS2425w0145024	ASPIRE OF WESTERN	9200-2	09/01/24	06/30/25			STAC is Not Approved
HARKONNEN	FEYD	03/25/21	CB	CB2425w0059277	ARC ERIE COUNTY NY -	9100-J	09/04/24	06/25/25			STAC is Not Approved
CARLSON	BECKY	03/25/21	RS	RS2425w0134005	ASPIRE OF WESTERN	9200-2	09/01/24	12/30/24	CB	01	STAC is Not Approved

Resolutions



- First, make sure you have downloaded the most recent Summary File – then rerun the unclaimed payment report.
- If the problem persists, continue to troubleshoot the problem

Resolutions cont.

STAC not sent

SEIT	24-25 2 Month	Iroquois		11/17/2024	11/19/2024	001	202425	K84988
CB	23-24 10 Month	Iroquois					202324	K84988
SWA		Iroquois						V04000

STAC sent, but not retrieved

Type	Session	District	Rejected	Last Sent	Last App'd	Rec#	Year	SEDStac#
SEIT	25-26 10 Month	Cheektowaga		11/10/2025		01	202526	M07130

STAC sent, but rejected

SEIT	10-11 10 Month	Ken/Ton		2/18/2011	3/4/2011		201011	C37115
SEIT	10-11 2 Month	Ken/Ton					201011	C37115

- Review the child's STAC screen. Check for any rejections, or that that STAC has been sent.
- If the STAC has not yet been sent – send a STAC batch for the given school year.
- If the STAC has been sent, check to see if the batch was retrieved. It may not yet have been downloaded.
- If the STAC has been rejected, will need to take additional steps to resolve the rejection



**Payment Exists for Month Outside of
STAC Approval Dates**

Payment Exists for Month Outside of STAC Approval Dates

- There are payment(s) outside of the approval dates for the STAC.
- This could be due to changed or incorrect dates on the STAC when approved, or changes made after the approval, but not resent to SED.

HARKONNEN	FEYD	03/25/21	CB	CB2425W0059277	ARC ERIE COUNTY NY -	9100-J	09/04/24	06/25/25			STAC is Not Approved	\$48,000.00	
ACOSTA	TOBY	12/30/21	RS	RS2425W0136143	BAKER VICTORY	9200-2	11/02/24	05/05/25	ST	01	Payment exists for month outside STAC	\$60.00	
CARLSON	BECKY	02/05/21	RS	RS2425W0134006	BAKER VICTORY	9200-2	09/01/24	12/30/24	COB	01	Payment exists for month outside STAC	\$0.00	

Review the STAC

SED Child & STAC Maintenance

Current Child: ACOSTA, TOBY

DOB: 12/30/2021

Eligibility: 07/01/24 - 08/31/24

STAC ID: 163723

Current Sess.: 24-25 10 Month

STAC Enrollment - RS

Provider: BAKER VICTORY SERVICES

Program: BAKER VICTORY SERVICES

Service: Speech Therapy

FromDate: 01/02/2025 ToDate: 05/05/2025 #Weeks: 18

Individual Group Group Size: 1

Enrollment	STAC Approval	County Enrollment Totals
Rate per Session: 60	Max 30 minute Rate: \$60.00	
Minutes per Session: 30	Avg 30 minute Rate: \$60.00	
#Sessions Per Week: 2		
Extra Sessions: 0		
Total Sessions: 36	Total 30-min session: 54	
Extra Session Cost: 0	Enrollment Totals: \$3,240.00	
Total Cost: 2160	Total for Max Rate: \$3,240.00	

ModifiedBy: Caspia ModifiedDateTime: 7/10/2026 4:35:00 PM

Update From County Enrollments

Status	ProviderCode	PrgCode	StacCd	Program	From	To	GSize	Type	Sess	Rate	Cost
APPROVED	140600640003	9200	2	1/2/2025	5/5/2025	60	2160	ST	01	\$36.00	
SENT	140600640003	9200	2	1/2/2025	5/5/2025	60	2160	ST	1	\$36.00	
APPROVED	140600640003	9200	2	1/2/2025	6/26/2025	60	2160	ST	01	\$36.00	

- First, review the current STAC approval to find out what the correct dates should be
- This can be reviewed by clicking the blue STAC ID at the top of the Child/STAC Info Screen
- Make sure the dates on the component match the current approval

Review the Enrollments

Enrollment RS / SEIT

RS SEIT

STAC 01/02/25-05/05/25 ST 9200-BAKER VICTORY SERVICES (250171)

Program BAKER VICTORY SERVICES - 9200 (60662)

Svc Type Speech Therapy Setting Community Setting

Individual Group Group Size 1 Location

Start Date 11/02/2024 End Date 05/05/2025 Term Date MM/DD/YYYY

Rx Start Date MM/DD/YYYY Rx End Date MM/DD/YYYY Rx Signature Date MM/DD/YYYY

Confirmation Letter Termination Letter Authorization Letter Service Confirmation letter

Type	Program	Service	From	To	X/Wk	Sessions	Rate	Total	Term	ClassRatio	MinutesPerSec
RS	BAKER VICTORY	Speech	11/2/2024	5/5/2025	2	54	\$60.00	\$3,240.00	1	1	30
RS	BAKER VICTORY	Speech	0/8/2020	6/24/2020	2	16	\$60.00	\$960.00	1	1	30

- Review the enrollments to see if the dates on the enrollment match the dates on the STAC and the STAC component.
- In this example – note how the enrollment dates are incorrect
 - STAC Dates: 01/02/2025 – 05/05/2025
 - Enrollment Dates: 11/02/2024 – 05/05/2026

Review the Payments

Payment List

Payments | Stac Summary

Label	ESID	From	To	Program	Frequency	Aide	Provider	Total	Paid	UnPaid	Claimed	UnClaimed	Svc	STACID	Rec#
A	RS2429W0136143	11/02/24	05/05/25	ST	2 x 30		BAKER VICTORY SERVICES	\$3,240.00	\$1,740.00	\$1,500.00	\$1,680.00	\$60.00	ST	L63729	01
B	RS2429W0140690	05/06/25	06/24/25	ST	2 x 30		BAKER VICTORY SERVICES	\$960.00	\$900.00	\$60.00	\$900.00	\$0.00	ST	L63729	02

☐ Show Payments for Selected Enrollment
☒ Show Payments for All Enrollments

☐ Include Pending Payments
☒ Show only Processed

Total of Selected Enrollments

Enrolled	Paid	UnPaid	Claimed	UnClaimed
0.00	0.00	0.00	0.00	0.00

Label	Month	Adj	Sess	Rate	Amount	Status	PaymentBatch	BatchDate	Check#	CheckDate	ClaimBatch	ClaimDate	Rec#	ClaimServiceType	Payee
A	11/2024	R	1	\$60.00	\$60.00	PAID	24-5181	07/10/25					01	ST	BAKER
A	01/2025	R	6	\$60.00	\$360.00	CLAIMED	25-0093	02/19/25			2401	04/07/25	01	ST	BAKER
A	02/2025	R	5	\$60.00	\$300.00	CLAIMED	25-0448	03/18/25			2401	04/07/25	01	ST	BAKER
A	03/2025	R	9	\$60.00	\$540.00	CLAIMED	25-0925	04/28/25			2402	07/01/25	01	ST	BAKER
A	04/2025	R	8	\$60.00	\$480.00	CLAIMED	25-1293	05/13/25			2402	07/01/25	01	ST	BAKER
B	05/2025	R	8	\$60.00	\$480.00	CLAIMED	25-2683	08/19/25			2403	11/18/25	02	ST	BAKER VICTORY
B	06/2025	R	7	\$60.00	\$420.00	CLAIMED	25-2683	08/19/25			2403	11/18/25	02	ST	BAKER VICTORY

Total of Selected Payments

Payment	Paid	Claimed
0.00	0.00	0.00

- Double click the enrollment to view the Payment List
- Because the dates were incorrect on this enrollment – it allowed for an incorrect payment for November to be created.
- This payment would either need to be adjusted or deleted in some cases.
- Please note – do not delete a payment batch without first confirming with a Preschool CRM



**Payment Exists for Months Outside
Enrollment Dates**

Payment Exists for Months Outside Enrollment Dates

- There are payment(s) that exist outside of the enrollment dates.
- This could be due to changed or incorrect dates on the enrollment.

ACOSTA	TODD	12/30/21	HS	HS2425W0130193	BAKER VICTORY	9200-2	11/02/24	03/03/25	DT	01	Payment exist for months outside enrollment	\$00.00
CARLSON	BECKY	03/05/21	RS	RS2425W0134006	THERAPEUTIC LINK	9200-2	09/01/24	12/20/24	DT	01	Payment exist for months outside enrollment	\$300.00
CARLSON	BECKY	03/05/21	RS	RS2425W0134006	BAKER VICTORY	9200-2	09/01/24	12/20/24	DT	01	Payment exist for months outside enrollment	\$0.00

Review the STAC

Current Child: CARLSON, BECKY | DOB: 03/05/21 | Eligibility: 14-25 10 Month | STAC ID: 100039 | Current Sess.: COR,OT,ST | RS: COR,OT,ST

Child & STAC Maintenance

SED Child Summary

Last Name: CARLSON | First Name: BECKY | DOB: 03/05/21 | Gender: F | Race/Eth:

School Year: 202425 | Show All Details | Only show details for selected STAC

Year	Session	Rec'd	Begin	End	Type	Amd	DistrictName	STAC
202425	WIN	01	09/01/24	06/26/25	SEIT/RS	03	BUFFALO CITY SD	

STACs | Evals

Service	Program	Begin	EndDate	Ind/Sip	30-min sess	Rate	Approved	Cost
COR	9200-2	09/01/24	12/20/24	IND	4	\$50.00	\$240.00	
OT	9200-2	09/01/24	12/20/24	IND	32	\$60.00	\$1,920.00	
ST	9200-2	09/01/24	06/26/25	IND	88	\$60.00	\$5,280.00	

STAC Enrollment - RS

☒ OK to Submit to SED | ☐ Force this STAC to be sent in next batch | ☐ Multiple Service STAC

Provider: THERAPEUTIC LINK FOR CHILDREN PLLC

Program: THERAPEUTIC LINK

Service: Occupational Therapy

FromDate: 09/01/2024 | ToDate: 12/20/2024 | # Weeks: 16

☒ Individual | ☐ Group | Group Size: 1

Enrollment		STAC Approval		County Enrollment Totals	
Rate per Session:	60	60	Max 30 minute Rate	\$60.00	
Minutes per Session:	30	30	Avg 30 minute Rate	\$60.00	
#Sessions Per Week:	2	2			
Extra Sessions:	0	0			
Total Sessions:	32	32	Total 30-min session	32	
Extra Session Cost:	0		Enrollment Totals	\$1,920.00	
Total Cost:	1920	1920	Total for Max Rate	\$1,920.00	

Update From County Enrollments

OK | Apply | RSEnrollment Setup | Details | Cancel

Status	ProviderCode	PrgCode	StacCd	Program	From	To	GSize	Type	Sess	Rate	Cost
APPROVED	140600540003	9200	2	9/1/2024							
	12/20/2024	60	1920	OT	01					\$32.00	
SENT	140600540003	9200	2	9/1/2024							
	12/20/2024	60	1920	OT	1					\$32.00	
SENT	140600540003	9200	2	9/1/2024							
	12/20/2024	60	1920	OT	1					\$32.00	

- First, review the current STAC approval to find out what the correct dates should be
- This can be reviewed by clicking the blue STAC ID at the top of the Child/STAC Info Screen
- Make sure the dates on the component match the current approval

Review the Enrollments

Enrollment RS / SEIT

RS SEIT

STAC 09/01/24-12/20/24 OT 9200-THERAPEUTIC LINK (247471)

Program THERAPEUTIC LINK - 9200 (60628)

Svc Type Occupational Therapy Setting Home

Individual Group Group Size 1 Location

Start Date 09/01/2024 End Date 12/20/2024 Term Date MM/DD/YYYY

Hx Start Date 09/01/2024 Hx End Date 06/30/2025 Hx Signature Date 09/04/2024 ICD 9 Diagnosis F82 ICD 10 Diagnosis Ordering Provider Mahony, Meghan (2687)

Confirmation Letter Termination Letter Authorization Letter Service Confirmation letter

Type	Program	Service	From	To	X/Wk	Sessions	Rate	Total	Term	ClassRatio	MinutesPer
RS	BAKER VICTORY	Coordination	9/1/2024	12/20/2024	1	4	\$60.00	\$240.00		1	30
RS	THERAPEUTIC	Occupational	9/1/2024	12/20/2024	2	32	\$60.00	\$1,920.00		1	30
RS	BAKER VICTORY	Speech	1/2/2025	6/26/2025	2	52	\$60.00	\$3,120.00		1	30
RS	BAKER VICTORY	Speech	9/1/2024	1/1/2025	2	36	\$60.00	\$2,160.00		1	30

- Review the enrollments to see if the dates on the enrollment match the dates on the STAC and the STAC component.
- In this example – note how the enrollment dates are correct, so our problem is elsewhere.
 - STAC Dates: 09/01/2024 – 12/20/2024
 - Enrollment Dates: 09/01/2024 – 12/20/2024

Review the Payments

Payment List

Payments | Stac Summary

Label	ESID	From	To	Program	Frequency	Aide	Provider	Total	Paid	UnPaid	Claimed	UnClaimed	Svc	STACID	Rec#
A	RS2425W0134006	09/01/24	12/20/24	OT	2 x 30		THERAPEUTIC LINK FOR	\$1,920.00	\$1,260.00	\$660.00	\$960.00	\$300.00	OT	L08099	01

☐ Show Payments for Selected Enrollment
☒ Show Payments for All Enrollments

☐ Include Pending Payments
☒ Show only Processed

Total of Selected Enrollments

Enrolled	Paid	UnPaid	Claimed	UnClaimed
0.00	0.00	0.00	0.00	0.00

Label	Month	Adj	Sess.	Rate	Amount	Status	PaymentBatch	BatchDate	Check#	CheckDate	ClaimBatch	ClaimDate	Rec#	ClaimServiceType	Payee
A	09/2024	R	4	\$60.00	\$240.00	CLAIMED	24-3483	10/29/24			2401	04/07/25	01	OT	THERAPEUTIC
A	10/2024	R	7	\$60.00	\$420.00	CLAIMED	24-4304	12/30/24			2401	04/07/25	01	OT	THERAPEUTIC
A	11/2024	R	2	\$60.00	\$120.00	CLAIMED	24-4611	01/13/25			2401	04/07/25	01	OT	THERAPEUTIC
A	12/2024	R	3	\$60.00	\$180.00	CLAIMED	24-4664	01/15/25			2401	04/07/25	01	OT	THERAPEUTIC
A	01/2025	R	5	\$60.00	\$300.00	PAID	25-4905	07/13/26					01	OT	THERAPEUTIC

Total of Selected Payments

Payment	Paid	Claimed
0.00	0.00	0.00

- Double click view the Payment List.
- Review to determine where the payment causing the error is. We can see there is a payment that exists for January.
- Erroneous payments would either need to be adjusted or deleted in some cases
- Please note – do not delete a payment batch without first confirming with a Preschool CRM



Questions, Comments, Concerns?



Overpaid County Enrollment

Preschoolsupport@CPSEPortal.com



What Does This Mean

There is a negative unpaid amount (overpayment) on the payment listing page

Why Did This Happen

Can occur in error-due to being double billed by a provider. Can occur due to an unprocessed rate change.

Resolution

Processing the Rate Change
Recouping Payment

Example of Overpaid County Enrollment

	Label	ESID	From	To	Program	Frequency	Aide	Provider	Total	Paid	UnPaid	Claimed	UnClaimed	Svc	STACID	Rec#
▶	A		09/09/24	04/10/25	OT	2 x 30		THERAPY PARTNERS /	\$3,828.00	\$4,290.00	(\$462.00)	\$3,828.00	\$462.00	OT	L24162	01
	B		04/11/25	06/27/25	OT	2 x 30		THERAPY PARTNERS /	\$1,452.00	\$990.00	\$462.00	\$990.00	\$0.00	OT	L24162	02



County Paid Higher than the Approved 30-minute Rate on the STAC

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County Paid Higher than the Approved 30-minute Rate on the STAC

- This means the County paid a rate for an enrollment that is higher than the 30-minute rate SED approved on the STAC.
- Rate needs to be updated by the County and approved by SED.

Details										
Service	Program	Begin	EndDate	Ind/Grp	30-min sess	Rate	Approved	Prior Claimed	Available	Status
ST	9200-2	09/08/15	06/24/16	IND	80	\$47.50	\$3,800.00	\$3,325.00	\$475.00	APPROVED



**The County Paid more 30-Minute Sessions
then were approved**

The County Paid more 30-Minute Sessions than were approved

- The County paid more sessions than SED approved on the STAC
- Check the number of sessions paid for against the total approved sessions on the child's SED summary.

Details											
	Service	Program	Begin	EndDate	Ind/Grp	30-min sess	Rate	Approved	Prior Claimed	Available	Status
▶	ST	9200-2	03/23/15	06/25/15	IND	26	\$45.00	\$1,170.00	\$990.00	\$180.00	APPROVED

More Sessions Continued

AVL Problem Research

School Year:

☒ All Payments
☐ Only Payments Through

Problem Type Filter
☒ All Rows
☐ Only rows where Potential Problem is not blank
☐ Only rows where Potential Problem is

Enrollment Type Filter
☒ All Enrollment Types
☐ Single Enrollment Type

Provider Filter
☒ All Providers
☐ Single Provider

Last Name	First Name	DOB	Type	ESID	Provider	Prog	From	To	SED Type	Rec#	Potential Problem	Amount	StatusDat	R
KING	CHRIS	07/13/17	RS	RS2122W0082065	THERAPY PARTNERS /	9200-2	09/14/21	06/23/22	ST1	02	County paid more 30 minute sessions than	(\$55.00)		
YOUNG	NOEL	07/02/17	CP	CP2122C0020050	SPECIAL PROGRAMS	0105-A	07/12/21	06/23/21	EDUC	02		(\$50.00)		

	Label	Month		Sess.	Rate	Amount
	A	09/2021	R	6	\$55.00	\$261.25
	A	09/2021	R	2	\$55.00	\$82.50
▶	A	09/2021	A		\$55.00	(\$55.00)
	A	10/2021	R	10	\$55.00	\$440.00
	A	11/2021	R	8	\$55.00	\$343.75
	A	12/2021	R	7	\$55.00	\$288.75
	A	01/2022	R	7	\$55.00	\$316.25
	A	01/2022	R	2	\$55.00	\$82.50
	A	02/2022	R	5	\$55.00	\$206.25
	A	03/2022	R	1	\$55.00	\$41.25
	A	03/2022	R	8	\$55.00	\$343.75
	A	04/2022	R	7	\$55.00	\$302.50
	A	05/2022	R	8	\$55.00	\$330.00
	A	06/2022	R	8	\$55.00	\$385.00

Our child had been approved for 8 sessions a month, a ninth was paid for. To correct we will need to increase the sessions on the STAC .

More Sessions Continued

STAC Enrollment - RS

☒ OK to Submit to SED ☒ Force this STAC to be sent in next batch ☐ Multiple Service STAC

Provider: [Dropdown]

Program: [Dropdown]

Service: [Dropdown]

FromDate: 09/07/2021 ToDate: 09/13/2021 #Weeks: 1

☒ Individual ☐ Group Group Size: 1

Enrollment		STAC Approval		County Enrollment Totals	
Rate per Session:	55	55	Max 30 minute Rate	\$55.00	
Minutes per Session:	30	30	Avg 30 minute Rate	\$55.00	
#Sessions Per Week:	2	2			
Extra Sessions:	1	1			
Total Sessions:	3	3	Total 30-min session	2	
Extra Session Cost:	55.00		Enrollment Totals	\$110.00	
Total Cost:	165	165.00	Total for Max Rate	\$110.00	

Sessions: ☒ Per Week ☐ Per Month ☐ Total

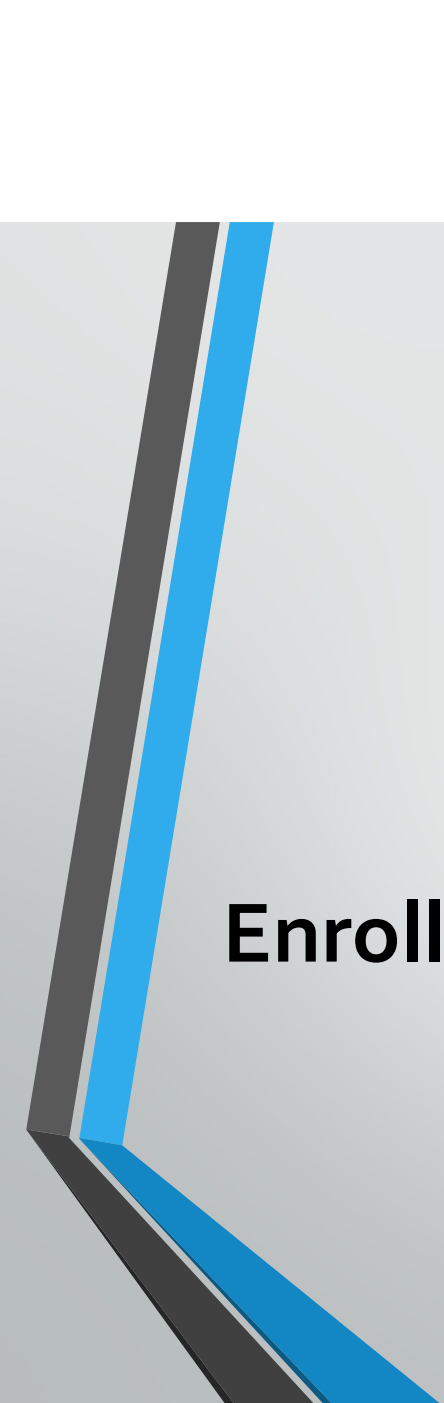
ModifiedBy: mcguinness

ModifiedDateTime: 2/23/2022 10:10:00 AM

Update From County Enrollments

OK Apply RSEnrollment Setup Details Cancel

- We will increase our number of sessions in the extra session box.
- Select Force this STAC to Be sent in the next batch



Enrollment is attached to a Withdrawn STAC Detail

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Enrollment is attached to a withdrawn STAC Detail

- The STAC Detail this enrollment is attached to has been marked as withdrawn by SED
- The Enrollment needs to be attached to a different STAC Detail, this may be on a different STAC entirely.

Enrollment is attached to a withdrawn STAC Detail

- To look into this right-click the child's problem message and select the Goto Child/STAC Screen option.
- On the Child/STAC Screen, find the STAC and select it.



Enrollment is attached to a withdrawn STAC Detail

- If it should be withdrawn, you will probably want to recoup the payments. If it should not be withdrawn, you will need to get it approved again or move the payments to a different STAC (preschoolsupport@cpseportal.com can assist with this)

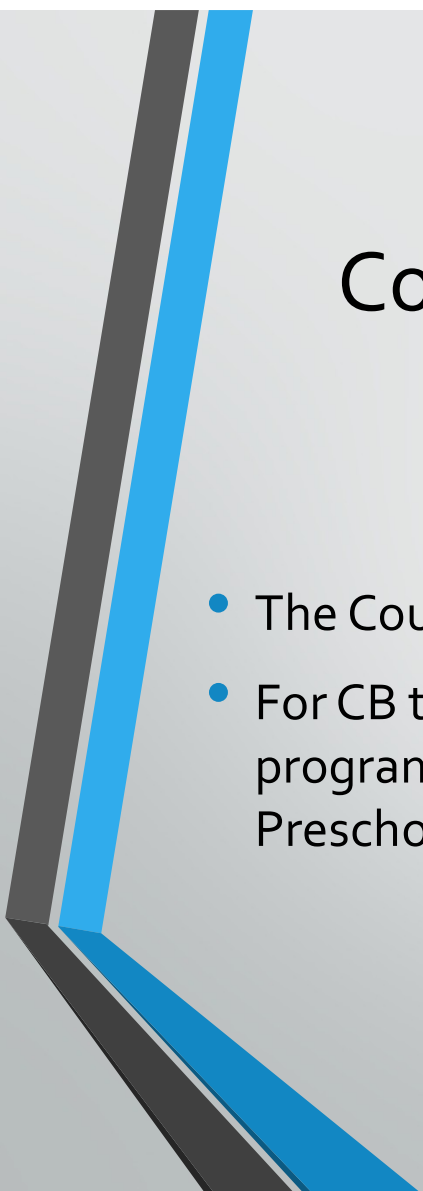
The screenshot displays a software interface for managing enrollment. At the top, there is a table with two rows of data. Below this, a form section includes tabs for 'STAC-1' and 'STAC Letters', and a dropdown menu for 'District' set to 'SODUS CSD'. At the bottom, there is a table with columns for 'Type', 'Program', 'RS', 'From Date', 'To Date', 'Per/Week', 'Weeks', 'Sessions', 'Rate', 'Total Cost', and 'Withdrawn Status'. The table contains two rows of data, both marked as 'WITHDRAWN'.

Type	Program	RS	From Date	To Date	Per/Week	Weeks	Sessions	Rate	Total Cost	Withdrawn Status
SEIT	BRIGHT START		9/4/2024	6/26/2025	4	40	160	\$45.00	\$7,200.00	WITHDRAWN
RS	RICE, MISSY IND	OT	9/4/2024	6/26/2025	2	40	80	\$80.00	\$6,400.00	WITHDRAWN



County Paid more than Approved on STAC

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County Paid more than Approved on STAC

- The County paid more than approved on the STAC
- For CB this could be because the rate changed, the dates changed, or the program changed and these changes have not been updated with SED or in Preschool.

County Paid more than Approved on STAC

- To look into this, take note of the REC #, Service Type, Program Code, and dates from the Problem Research Report.
- Then Right-Click on the child's problem line and click on the Goto Child/STAC Screen option.



County Paid more than Approved on STAC

- Then Select the appropriate STAC, ensure the dates, and Program code are correct

CB	Center Based	Lackawanna	3/19/2024	3/21/2024	01	202324	ELECTRONIC			
CB	23-24 10 Month	Lackawanna	12/1/2023	12/5/2023	02	202324	ELECTRONIC			
CB	23-24 2 Month	Lackawanna	11/1/2022	11/3/2022	01	202223	ELECTRONIC			
EVAL		Lackawanna	3/25/2022	3/29/2022	01					

☒ Center Based
☐ SEIT - Hybrid Services
☐ Evaluation

STAC-1 STAC Letters Foster Care County

District
Lackawanna

Type	Program	RS	From Date	To Date	PerWeek	Weeks	Sessions	Rate	TotalCost	WithdrawStatus
CB	SUMMIT (9100)		9/6/2023	12/14/2023		14		\$59,751.00	\$21,390.85	
TRANS					0		0	\$28,000.00	\$28,000.00	

County Paid more than Approved on STAC

- Then Click on the child's Blue STACID to open the STAC Summary. Compare what is entered on the STAC Screen to what is approved by SED.
- In this case the Blue STAC Screen and the SED Summary match.

Type	Program	RS	From Date	To Date	Per Week	Weeks	Sessions	Rate	Total Cost	Withdraw Status
CB	SUMMIT (\$100)		9/6/2023	12/14/2023		14		\$59,751.00	\$21,390.85	
TRANS					0		0	\$28,000.00	\$28,000.00	

SED Child Summary

Last Name: First Name: MI: STACID:

DOB: Gender: Race/Ethnicity:

STACs: Eval:

School Year:

202324

☐ Show All Details ☒ Only show details for selected STAC

STACs														
Year	Session	Rec#	Begin	End	Type	Amd	District Name	Educ Provider	Multi	Prov is Eval	Issued	Summary	CPSE Code	Provider C
202324	WIN	01	09/06/23	12/14/23	CB	03	LACKAWANNA CITY SD	SUMMIT	N	N	03/19/24	01/18/26	141800010000	14020395
202324	SUM	02	07/10/23	08/18/23	CB	02	LACKAWANNA CITY SD	BAKER VICTORY	N	N	06/07/24	01/18/26	141800010000	14180013
202324	WIN	03	12/15/23	05/20/24	CB	01	LACKAWANNA CITY SD	SUMMIT	N	N	03/19/24	01/18/26	141800010000	14020395

Details

Service	Program	Begin	EndDate	Hrs/Day	Days/Week	Aide%	Aide Rate	FTE	Rate	Approved	Prior Claimed	Available	Status
EDUC	\$100+	09/06/23	12/14/23	5	5	00%	\$0.00	0.358	\$59,751.00	\$21,390.85	\$19,007.64	\$2,383.21	APPROVED
TRAN		09/06/23	12/14/23							\$28,000.00	\$8,851.29	\$19,148.71	APPROVED

County Paid more than Approved on STAC

- Next, go to the Grey County enrollment screen and look at the enrollment. Find the enrollment and double click to see the payment list.
- In this case, the payments that are attached to the STAC REC 01 total a higher amount [\$21,407.49] than what was approved by SED [\$21,390.85].
- The overpayment would need to be recouped or moved. Contact us if you need assistance with this.

Payment List														
Payments Stac Summary														
Label	ESID	From	To	Program	Frequency	Aide	Provider	Total	Paid	UnPaid	Claimed	UnClaimed	STACID	Rec'd
A	CB2324w0053404	05/06/23	12/14/23	31001	5 hrs /5 days	N	SUMMIT	\$21,390.85	\$15,279.17	\$6,111.68	\$12,879.32	\$2,399.95	J89576	01
B	CB2324w0054153	12/15/23	06/20/24	31604	5 hrs /5 days	N	SUMMIT	\$30,832.74	\$25,899.50	\$4,933.24	\$25,899.50	\$0.00	J89576	03

☐ Show Payments for Selected Enrollment	☐ Include Pending Payments	Total of Selected Enrollments	Enrolled	Paid	UnPaid	Claimed	UnClaimed
☒ Show Payments for All Enrollments	☒ Show only Processed		\$21,390.85	\$15,279.17	\$6,111.68	\$12,879.32	\$2,399.95

Label	Month	Adj	Amount	Status	PaymentBatch	BatchDate	Check#	CheckDate	ClaimBatch	ClaimDate	Rec'd	ClaimServiceType	Page#
A	10/2023	R	\$5,505.64	PAID	23-3821	11/20/23						EDUC	SUMMIT
A	10/2023	A	\$622.68	CLAIMED	24-0060	02/29/24			2301	04/03/24	01	EDUC	SUMMIT
A	10/2023	A	(\$16.64)	PAID	24-3073	09/23/24						EDUC	SUMMIT
A	11/2023	R	\$5,505.64	CLAIMED	23-4371	12/26/23			2301	04/03/24	01	EDUC	SUMMIT
A	11/2023	A	(\$16.64)	PAID	24-3073	09/23/24						EDUC	SUMMIT
A	11/2023	A	\$622.68	CLAIMED	24-0060	02/29/24			2301	04/03/24	01	EDUC	SUMMIT
A	12/2023	R	\$5,505.64	CLAIMED	23-4812	01/22/24			2301	04/03/24	01	EDUC	SUMMIT
A	12/2023	A	\$3,872.51	PAID	24-3073	09/23/24						EDUC	SUMMIT
A	12/2023	A	\$622.68	CLAIMED	24-0060	02/29/24			2301	04/03/24	01	EDUC	SUMMIT
B	12/2023	R	\$2,466.62	CLAIMED	23-5329	07/07/25			2306	07/14/25	03	EDUC	SUMMIT
B	01/2024	R	\$5,505.64	CLAIMED	24-0062	02/29/24			2301	04/03/24	01	EDUC	SUMMIT
B	01/2024	A	(\$1,195.08)	CLAIMED	24-3073	09/23/24			2306	07/14/25	03	EDUC	SUMMIT
B	01/2024	A	\$622.68	CLAIMED	24-0060	02/29/24			2301	04/03/24	01	EDUC	SUMMIT
B	03/2024	R	\$4,933.24	CLAIMED	24-0945	04/29/24			2302	05/27/24	03	EDUC	SUMMIT
B	04/2024	R	\$4,933.24	CLAIMED	24-1343	05/20/24			2302	05/27/24	03	EDUC	SUMMIT
B	05/2024	R	\$4,933.24	CLAIMED	24-1776	06/17/24			2302	05/27/24	03	EDUC	SUMMIT
B	06/2024	R	\$3,699.92	CLAIMED	24-2230	07/23/24			2303	05/16/24	03	EDUC	SUMMIT

Refresh	Re-Align	Total of Selected Payments	Payment	Paid	Claimed
			\$21,407.49	\$21,407.49	\$19,007.64



STAC Detail Not approved

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STAC Detail Not Approved

- A Detail on the STAC has been entered in Preschool, but it has not been approved by SED.
- This could be because it has not been sent, it has been rejected, the Summary Files have not been imported.

STAC Detail Not Approved

- To look into this start by importing the SED Summary Files and then re run the problem research screen.
- If the problem is still the same begin by right clicking the child and going to the Child/STAC Info screen.



STAC Detail Not Approved

- On the Blue STAC Screen you can see if a batch was sent or not.
- If it was sent but not approved it may have been rejected or the batch may not have been imported.
- If it was rejected, click view details to see why it was rejected and resolve the rejection.

	Type	Session	District	Rejected	Last Sent	Last App'd	Rec#	Year	SEDSec#	X-MI	DueSTAC	Force	OKToSend	Status
	SEIT	23-24 2 Month	NEWARK CSD		8/1/2023	8/2/2023	01	202324		ELECTRONIC	☐	☐	☒	
▶	SEIT	22-23 10 Month	NEWARK CSD	3/17/2026	2/13/2026			202223		ELECTRONIC	☐	☐	☒	

	Type	Session	District	Rejected	Last Sent	Last App'd	Rec#	Year	SEDSec#	X-MI	DueSTAC	Force	OKToSend	Status
	SEIT	23-24 2 Month	NEWARK CSD		8/1/2023	8/2/2023	01	202324		ELECTRONIC	☐	☐	☒	
▶	SEIT	22-23 10 Month	NEWARK CSD	3/17/2026	2/13/2026			202223		ELECTRONIC	☐	☐	☒	



**County Requires check date to claim and no
check date has been entered**

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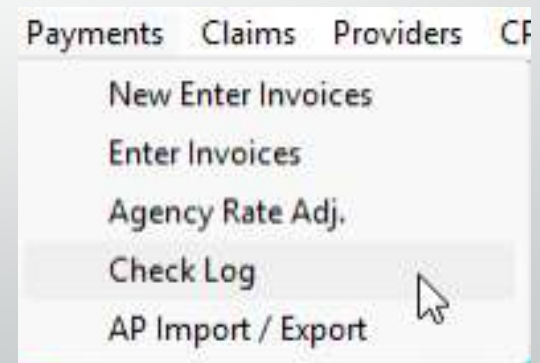


County Requires check date to Claim and no Check date has been entered

- This only applies to some counties.
- If you see this problem, it means that your county requires a check number to be entered on the Check Log before the payment can be claimed.
- To resolve this just go to the check log and enter the check number.

County Requires check date to Claim and no Check date has been entered

- To add the Check number Go To the Check Log.
- Payments > Check Log



County Requires check date to Claim and no Check date has been entered

- Then find the Batch and enter the Check Number, Check Amount, and Check Date.

1	Check #	Check Amt	Vendor Invoice #	Vendor Inv Date	County Voucher #	Check Date
0			RS26011214			

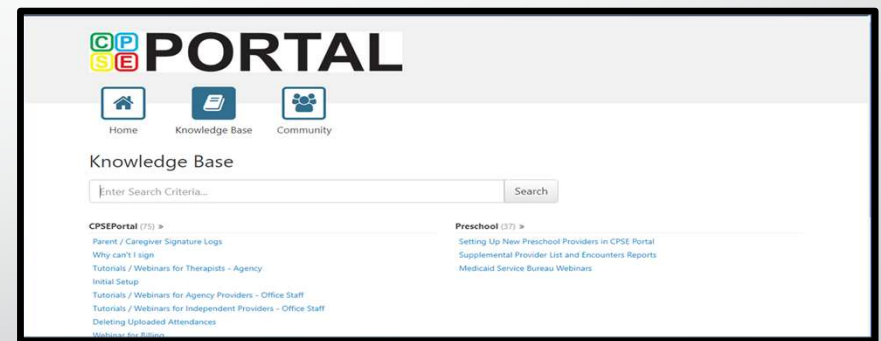


Closing

Preschoolsupport@CPSEPortal.com

Preschool Knowledge Base

- The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Preschool support.
- You can simply click the Knowledge Base tab in the CPSE Portal or you can go to:
- <http://support.cpseportal.com/kb>



Knowledge Base Articles

- AVL Problem Research General Guide
 - <http://support.cpseportal.com/kb/a758/avl-problem-research-general-guide.aspx>
- AVL Problem Research Guide
 - <http://support.cpseportal.com/kb/a803/avl-problem-research-problems-guide.aspx>
- Import Summary Files
 - <http://support.cpseportal.com/kb/a115/importing-sed-summary-file-stac-eval-into-preschool.aspx>
- Send STAC-1's to SED
 - <http://support.cpseportal.com/kb/a113/submitting-stac-1s-to-nysed.aspx>
- Send STAC-5's to SED
 - <http://support.cpseportal.com/kb/a619/submitting-stac-5s-to-nysed.aspx>

Survey

- At the end of this webinar there will be a 5 questions survey
- If you have time, please complete the survey as it will help us to improve our future webinars

Closing Remarks

- If you need assistance with Preschool the Preschool Helpdesk is available through email at preschoolsupport@cpseportal.com
 - When you send us an email:
 - Do **not** use child's name
 - Use ESID #, Child # or STAC ID #
 - Include any error or warning messages you received