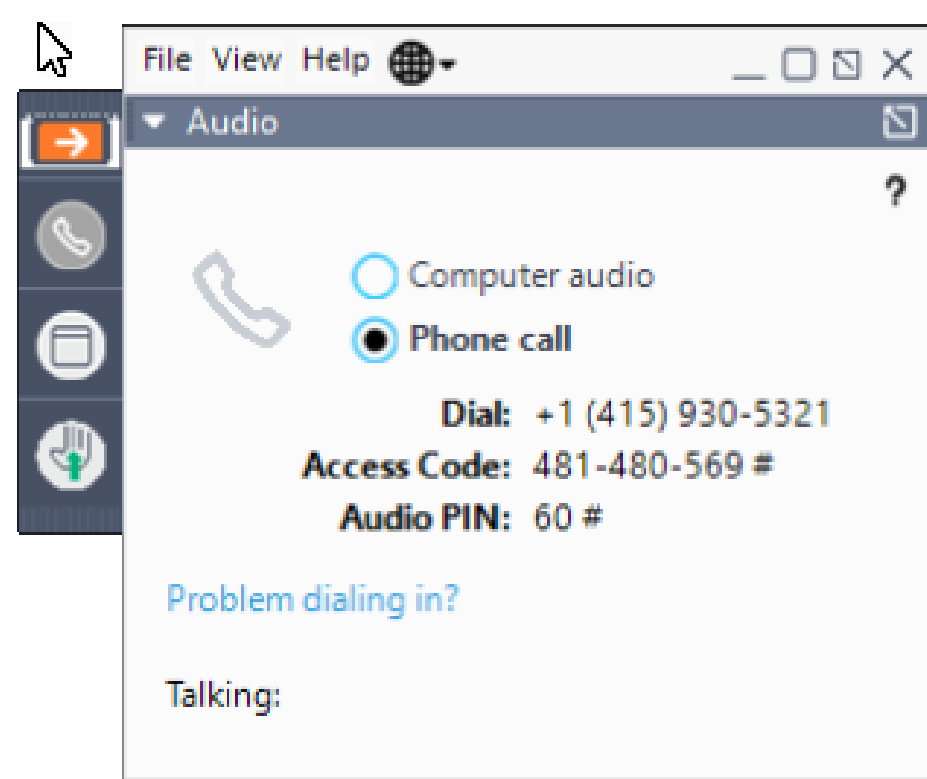


Using Go To Webinar

Go To Webinar Control Panel

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

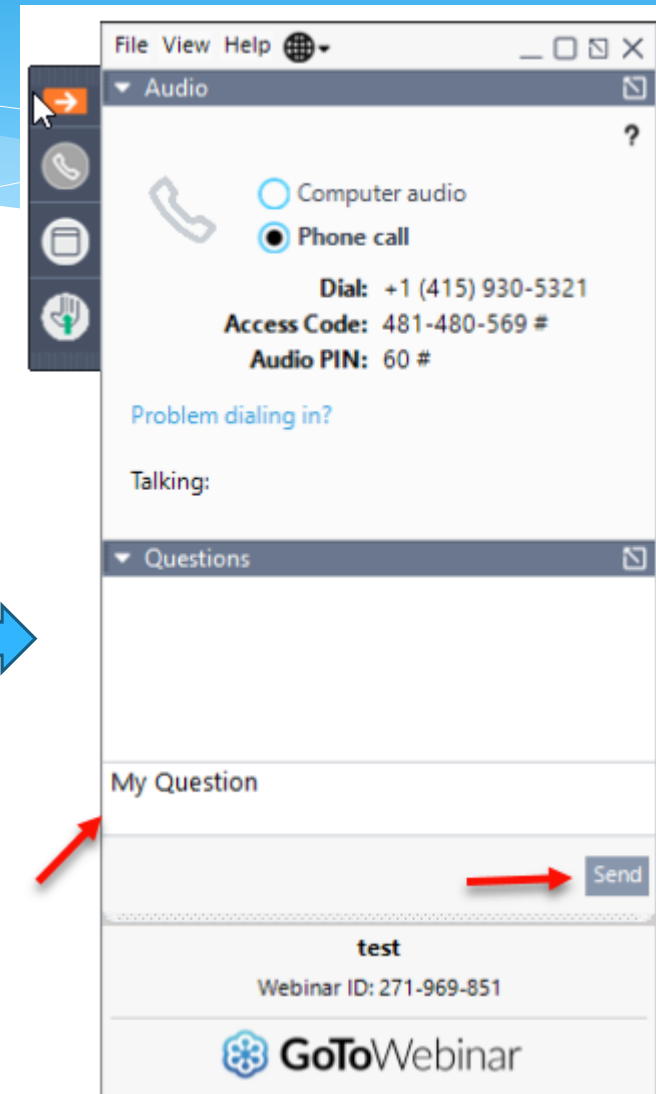
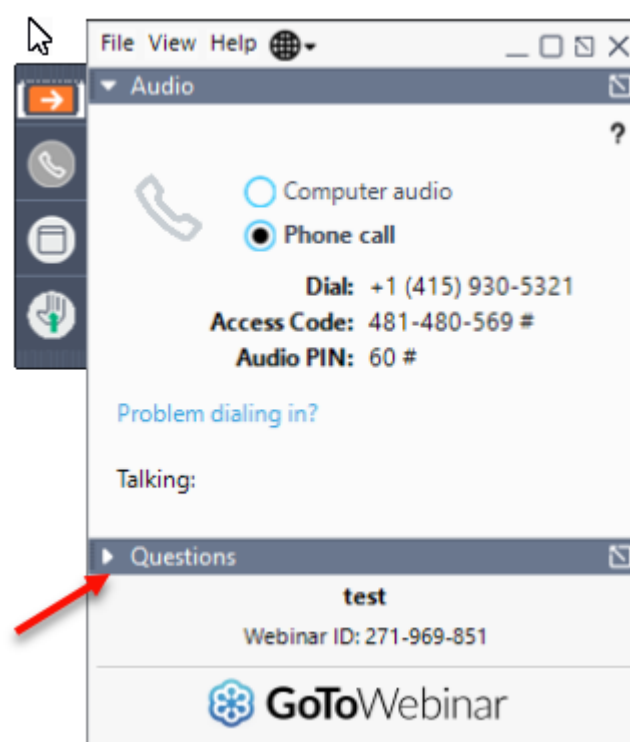


Communicating with Presenter

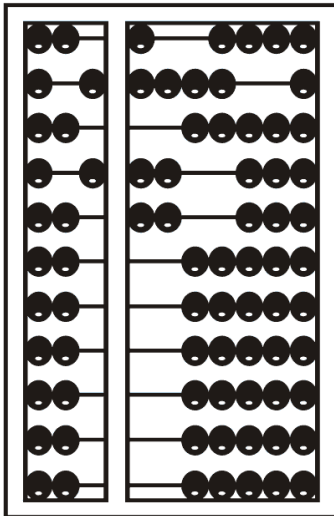
- * All participants are on mute
- * You can type in question in the question box
- * We will answer your question, and also stop at some point to review the questions and answers for everyone.

Typing in a Question

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



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Center Based Set Up & Attendance for CB Agencies

Topics Covered

- * **Classroom Management**

- * Create Classrooms (including 1:1 Aide Classrooms)
- * Assigning Teacher/Aide to Classrooms
- * Assigning Children to Classrooms
- * Classroom List

- * **Creating a Schedule for the School**

- * Adding and Editing School Closures
- * Applying Schedule to Classrooms Attendance

- * **Unmatched Children and Enrollments**

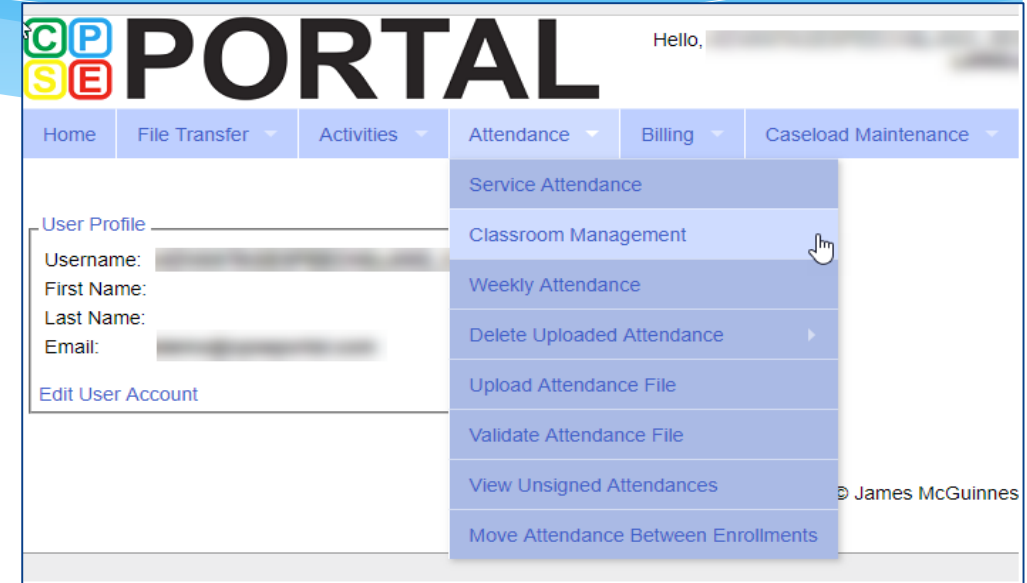
- * Child Lookup
- * Adding and Editing Unmatched Children/Enrollments
- * Entering Unmatched CBRS Enrollments
- * Matching Children and Enrollments

- * **Entering and Signing Classroom Attendance**

- * **CB Enrollments Missing Attendance**

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

A screenshot of the 'Filter Classrooms' section of the application. It includes a 'Filter Classrooms' header, a 'School Year Session' dropdown menu set to 'All Sessions', and a 'Program: Active During' section with three dropdown menus for selecting month and year. Below these is an 'Apply Filter' button. At the bottom, there is a 'Create New Classroom' button with a plus icon, which is highlighted by a red arrow.

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

more/less

Program:

9100

9100

9160

9165

AIDE

Name:

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
Name:
Description:
Students: # Teachers: # Aides:
[\[+ Assign Teachers/Aides \]](#) 

Program:

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.

☐ Select All Unassign →

Not Assigned

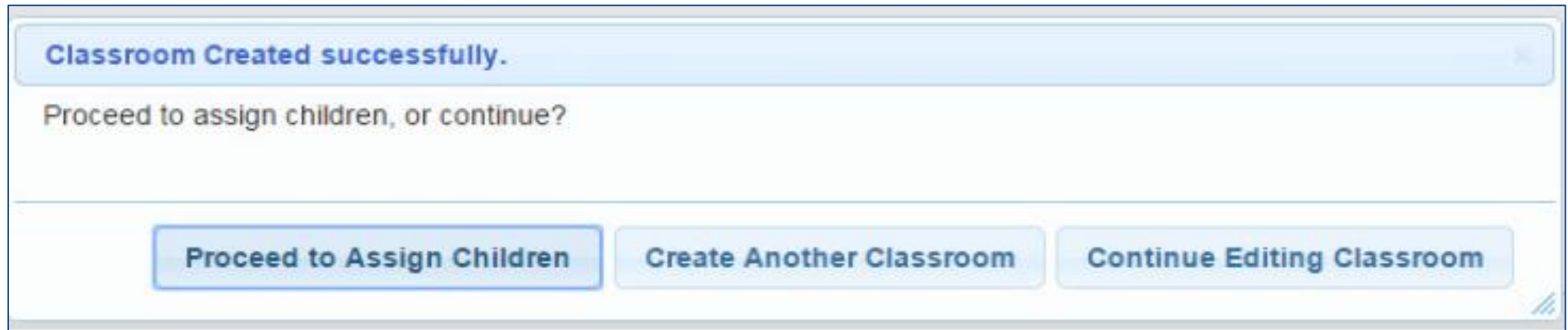
| Select | LastName | FirstName | Role |
|-------------------------------------|----------|-----------|-----------|
| <input type="checkbox"/> | ... | ... | Teacher ▼ |
| <input checked="" type="checkbox"/> | ... | ... | Teacher ▼ |
| <input checked="" type="checkbox"/> | ... | ... | Aide ▼ |
| <input type="checkbox"/> | ... | ... | Teacher ▼ |
| <input checked="" type="checkbox"/> | ... | ... | Aide ▼ |
| <input type="checkbox"/> | ... | ... | Teacher ▼ |
| <input type="checkbox"/> | ... | ... | Teacher ▼ |
| <input type="checkbox"/> | ... | ... | Teacher ▼ |

← Assign ☐ Select All

Create Classroom ←

Assigning Teacher/Aide To Classrooms

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



The screenshot shows a light blue dialog box with a title bar. Inside, a message box at the top says "Classroom Created successfully." with a close button. Below it, the text "Proceed to assign children, or continue?" is displayed. At the bottom, there are three buttons: "Proceed to Assign Children", "Create Another Classroom", and "Continue Editing Classroom". A small icon is visible in the bottom right corner of the dialog box.

Classroom Created successfully.

Proceed to assign children, or continue?

Proceed to Assign Children Create Another Classroom Continue Editing Classroom

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 | | |
| Last Name | | |
| DOB | | |
| Gender | F | |
| Address | | |
| County | Albany | |
| District | COHOES CITY SD | |

[Sessions For Enrollment Report](#)



| Child Demographic Info | Service Info |
|------------------------|--------------|
| Service ID | |
| Enrollment Type | CB |
| Provider Name | |
| 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](#)

Select Report Criteria

CB ☐ CBRS ☒ RS ☐ SEIT ☐

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

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 unassign a child select box next to child and click "Unassign" or click "Select All" box and click "Unassign"
- * Click "Save Changes"


Classroom: 2.5 HR AM

Assigned to Classroom

No children currently assigned to classroom.

☐ Select All Unassign →

Not Assigned [+ Filter Unassigned Children]

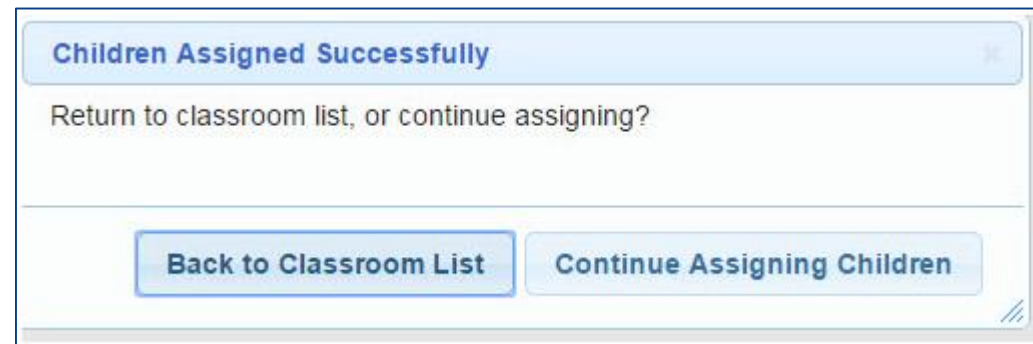
| Select | Last Name | First Name | District | County | DOB | |
|-------------------------------------|------------|------------|----------------|--------|-----------|---|
| <input checked="" type="checkbox"/> | [REDACTED] | [REDACTED] | COHOES CITY SD | Albany | 4/28/2010 | Details  |

← Assign ☐ Select All

Save Changes

Assigning Children To Classrooms

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



Classroom List

- * 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"

Classroom List:

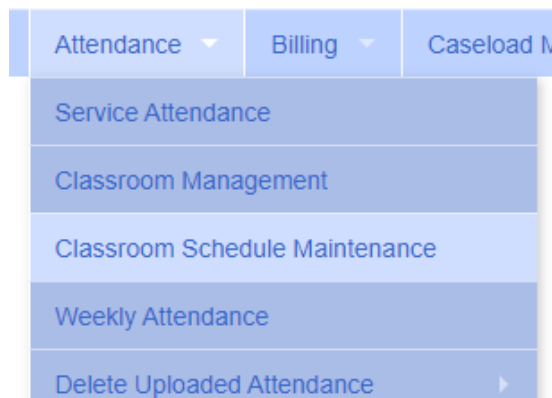
HomeFile TransferAttendance and BillingLookupReportsMy AccountPeopleFAQ

+ Filter Classrooms

| | Class | Description | School Year | Program | # Students | # Teachers | # Aides | | | |
|------------|--------------------------|----------------------|--------------------|---------|------------|------------|---------|----------------|-----------------|------------------|
| Attendance | (0:0:0) | | 2013 - 2014 Winter | 9100 | 0 | 0 | 0 | Edit Classroom | Assign Children | Delete Classroom |
| Attendance | 2.5 HR AM (0:1:1) | 2.5 HR AM | 2013 - 2014 Winter | 9165 | 6 | 1 | 0 | Edit Classroom | Assign Children | |
| Attendance | 2.5 HR AM (12:1:2) | 2.5 HR AM INTEGRATED | 2014 - 2015 Winter | 9165 | 0 | 1 | 2 | Edit Classroom | Assign Children | Delete Classroom |
| Attendance | 2.5 HR AM (12:1:3) | 2.5 HR AM INTEGRATED | 2014 - 2015 Winter | 9165 | 0 | 1 | 2 | Edit Classroom | Assign Children | Delete Classroom |
| Attendance | 2.5 HR AM (12:1:2) | 2.5 | 2013 - 2014 Winter | 9100 | 0 | 0 | 0 | Edit Classroom | Assign Children | Delete Classroom |
| Attendance | 2.5 HR AM (12:1:2) | 2.5 | 2013 - 2014 Winter | 9100 | 6 | 0 | 0 | Edit Classroom | Assign Children | Delete Classroom |
| Attendance | 2.5 HR AM (12:1:2) | 2.5 | 2013 - 2014 Winter | 9100 | 0 | 0 | 0 | Edit Classroom | Assign Children | Delete Classroom |
| Attendance | 2.5 Hr AM SUMMER (0:0:0) | | 2014 - 2015 Summer | 9165 | 4 | 1 | 0 | Edit Classroom | Assign Children | |
| Attendance | 2.5 Hr AM Winter (0:0:0) | 2.5 HR Fall 2014-15 | 2014 - 2015 Winter | 9165 | 6 | 1 | 0 | Edit Classroom | Assign Children | |
| Attendance | 2.5 HR PM (0:0:0) | 2.5 HR PM | 2013 - 2014 Winter | 9165 | 5 | 1 | 0 | Edit Classroom | Assign Children | |
| Attendance | 2.5 HR PM (0:0:0) | 2.5 HR PM | 2010 - 2011 Winter | 9160 | 0 | 1 | 0 | Edit Classroom | Assign Children | Delete Classroom |

Creating a Schedule for the School

- * 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.

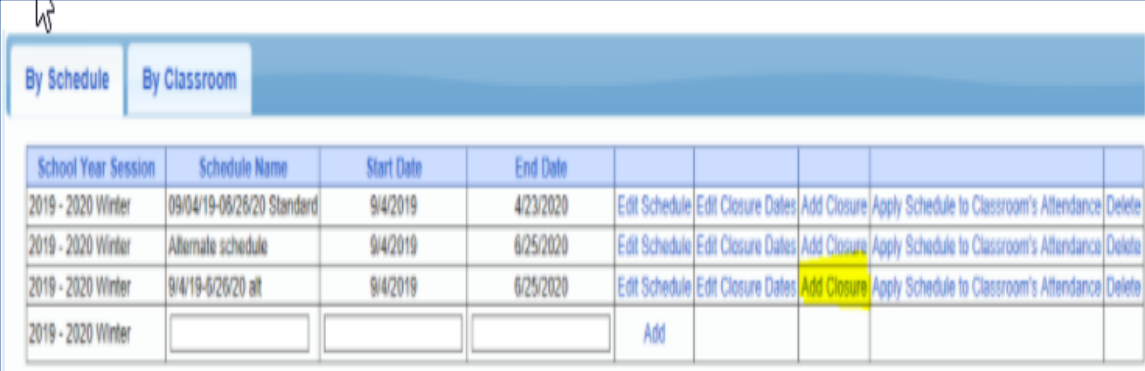


A screenshot of the 'Classroom Schedule Maintenance' interface. At the top, there are two dropdown menus: 'Provider' set to 'EARLY SUCCESS INC' and 'School Year Session' set to '2019 - 2020 Winter' (highlighted in yellow). Below these are two tabs: 'By Schedule' (active) and 'By Classroom'. The main area contains a table with columns: 'School Year Session', 'Schedule Name', 'Start Date', 'End Date', and several action buttons. The table has three rows of data, with the last row having an 'Add' button. At the bottom, there is another row with an 'Add' button.

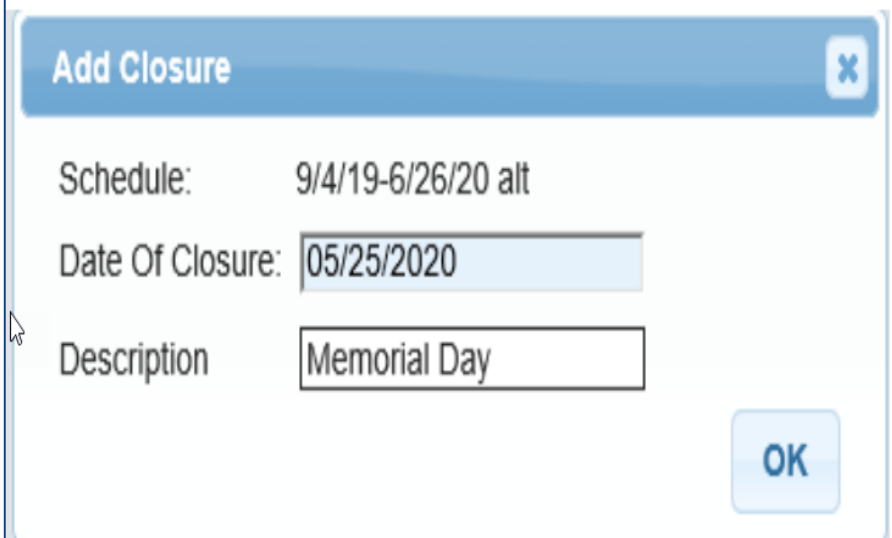
| School Year Session | Schedule Name | Start Date | End Date | | | | | |
|---------------------|----------------------------|------------|------------|---------------|--------------------|-------------|--|--------|
| 2019 - 2020 Winter | 09/04/19-06/26/20 Standard | 9/4/2019 | 4/23/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | Alternate schedule | 9/4/2019 | 6/25/2020 | Update Cancel | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | 9/4/19-6/26/20 alt | 09/04/2019 | 06/25/2020 | Add | | | | |
| 2019 - 2020 Winter | 9/4/19-6/26/20 alt | 09/04/2019 | 06/25/2020 | 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.



| School Year Session | Schedule Name | Start Date | End Date | | | | | |
|---------------------|----------------------------|------------|-----------|---------------|--------------------|-------------|--|--------|
| 2019 - 2020 Winter | 09/04/19-06/26/20 Standard | 9/4/2019 | 4/23/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | Alternate schedule | 9/4/2019 | 6/25/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | 9/4/19-6/26/20 alt | 9/4/2019 | 6/25/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | | | | Add | | | | |



Add Closure ✕

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

Date Of Closure: 05/25/2020

Description: Memorial Day

OK

Editing a Closure Date

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

| By Schedule By Classroom | | | | | | | | |
|----------------------------|----------------------------|------------|-----------|---------------|--------------------|-------------|--|--------|
| School Year Session | Schedule Name | Start Date | End Date | | | | | |
| 2019 - 2020 Winter | 09/04/19-06/26/20 Standard | 9/4/2019 | 4/23/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | Alternate schedule | 9/4/2019 | 6/25/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | 9/4/19-6/26/20 alt | 9/4/2019 | 6/25/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | | | | 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 |
| | | | 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.

By Schedule

By Classroom

| School Year Session | Schedule Name | Start Date | End Date | | | | | |
|---------------------|----------------------------|------------|-----------|---------------|--------------------|-------------|--|--------|
| 2019 - 2020 Winter | 09/04/19-06/26/20 Standard | 9/4/2019 | 4/23/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | Alternate schedule | 9/4/2019 | 6/25/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | 9/4/19-6/26/20 alt | 9/4/2019 | 6/25/2020 | Edit Schedule | Edit Closure Dates | Add Closure | Apply Schedule to Classroom's Attendance | Delete |
| 2019 - 2020 Winter | | | | Add | | | | |

Apply Closures for Month to Child Attendance Records ✕

Schedule Month: January ▼

| 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

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

Provider: **EARLY SUCCESS INC** School Year Session: **2019 - 2020 Winter**

By Schedule **By Classroom**

| Classroom Name | Description | School Year Session | Program | Schedule | | | | |
|----------------|-------------|---------------------|---------|----------------------------|--------|-------------|--|----------|
| AQ - 1 AM | AQ - 1 AM | 2019 - 2020 Winter | 9100 | 09/04/19-06/26/20 Standard | Assign | Add Closure | Apply Schedule to Classroom's Attendance | Unassign |
| AQ - 2 | AQ - 2 | 2019 - 2020 Winter | 9160 | 09/04/19-06/26/20 Standard | Assign | Add Closure | Apply Schedule to Classroom's Attendance | Unassign |
| AQ - 3 AM | AQ - 3 AM | 2019 - 2020 Winter | 9165 | 09/04/19-06/26/20 Standard | Assign | Add Closure | Apply Schedule to Classroom's Attendance | Unassign |
| AQ - 5 | AQ - 5 | 2019 - 2020 Winter | 9100 | 09/04/19-06/26/20 Standard | Assign | Add Closure | Apply Schedule to Classroom's Attendance | Unassign |
| AQ - 6 | AQ - 6 | 2019 - 2020 Winter | 9160 | 09/04/19-06/26/20 Standard | Assign | Add Closure | Apply Schedule to Classroom's Attendance | Unassign |

Add Closure [X]

Schedule: Classroom: AQ - 1 AM

Date Of Closure: 05/25/2020

OK

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.

| Classroom Name | Description | School Year Session | Program | Schedule | | | | |
|----------------|-------------|---------------------|---------|----------------------------|--------|-------------|--|----------|
| AQ - 1 AM | AQ - 1 AM | 2019 - 2020 Winter | 9100 | 09/04/19-06/26/20 Standard | Assign | Add Closure | Apply Schedule to Classroom's Attendance | Unassign |
| AQ | AQ - 2 | 2019 - 2020 Winter | 9160 | 09/04/19-06/26/20 Standard | Assign | Add Closure | Apply Schedule to Classroom's Attendance | Unassign |

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
- ❖ “Unmatched [child or enrollment]”: temporary [child or enrollment] records
- ❖ 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.
- ❖ Unmatched children do not have an ESID

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 [Show Advanced Search options]

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

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)

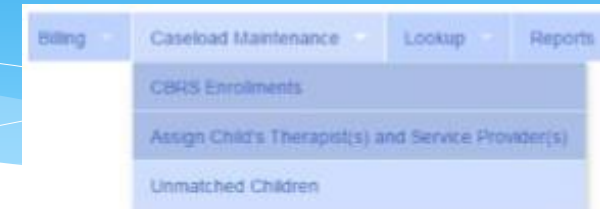
Child Lookup

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

School Year County Provider District

Child Number STAC ID Electronic Service ID Medicaid CIN

Unmatched Children



❖ Navigate top menu to Caseload Maintenance > Unmatched Children

Unmatched Children

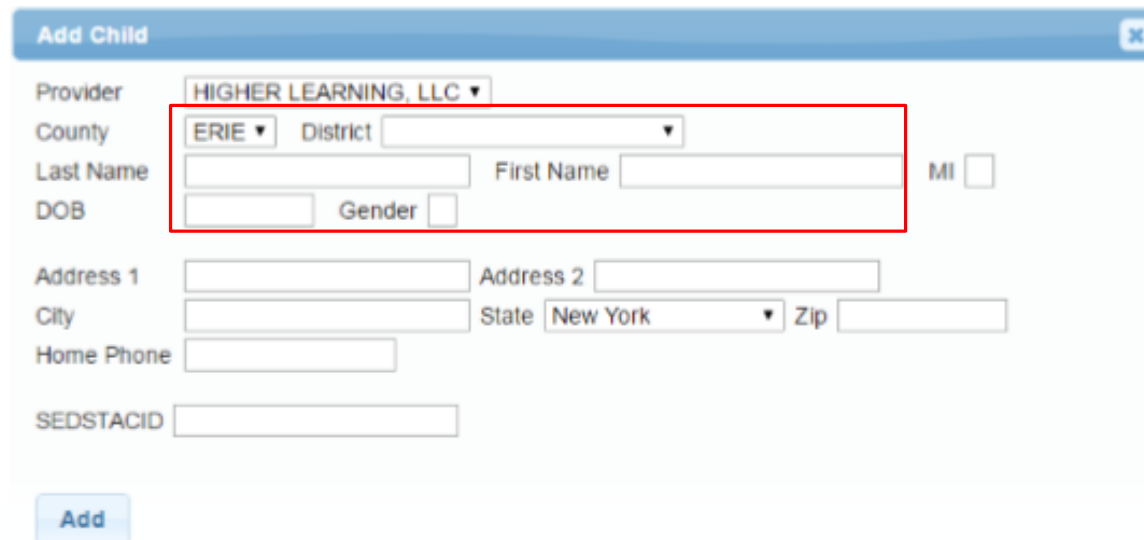
Add Child



| 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

| 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

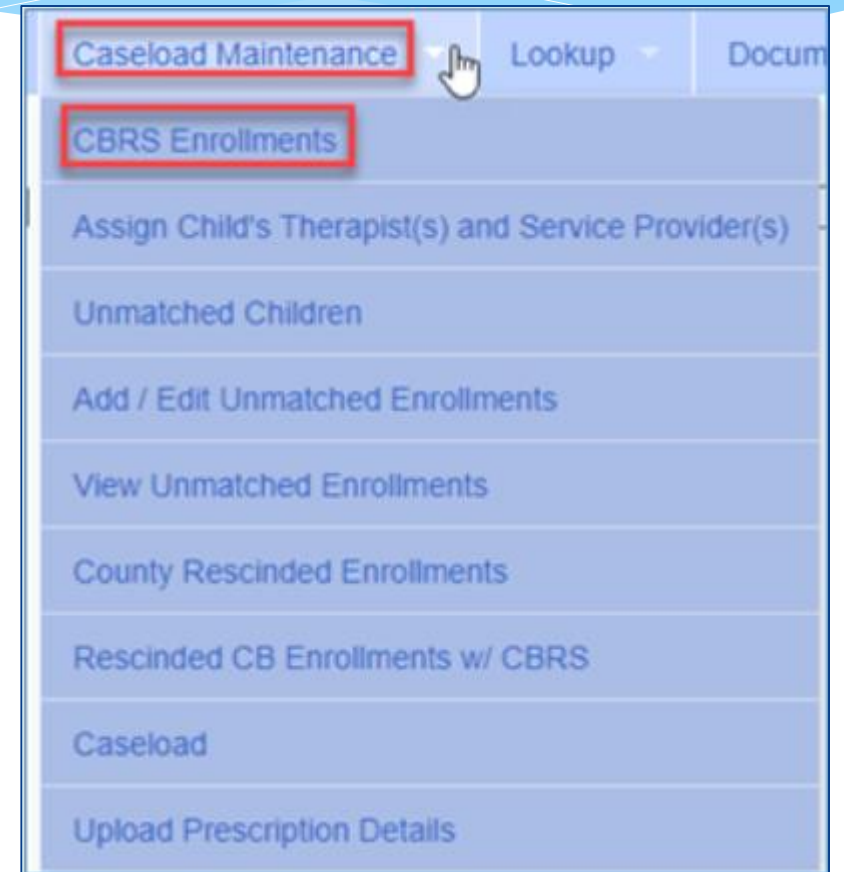
❖ District

❖ 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 |

Entering Unmatched CBRS Enrollments

- * Once the child is in the CPSE Portal (either in the system from prior services or has been entered as an unmatched child) and the Center-Based (CB) unmatched enrollment has been created, you can now add the Center-Based Related Service (CBRS) Enrollments.
- * Go to Caseload Maintenance>CBRS Enrollments



Entering Unmatched CBRS Enrollments

- * First search for the Center Based enrollment
- * Select the correct session, enter the child's information (Last Name, First Name, DOB)
- * Click SEARCH.

CB Enrollments
Session Provider County
Last Name First Name DOB

Entering Unmatched CBRS Enrollments

- * Click "SELECT" at the end of the row for the correct child.

| County | District | Last Name | First Name | ElectronicServiceID | Provider | Program | Start Date | End Date |  |
|--------|----------------------|-----------|------------|---------------------|--|---------|------------|------------|---|
| NASSAU | FRANKLIN SQUARE UFSD | SCOTT | ANDREW | CB1516W0053700 | MISERICORDIA UNIVERSITY SPEECH-LANGUAGE AND HEARING CENTER | 9160- | 09/02/2015 | 01/14/2016 | Select |
| NASSAU | FRANKLIN SQUARE UFSD | SCOTT | ANDREW | CB1516W0054977 | MISERICORDIA UNIVERSITY SPEECH-LANGUAGE AND HEARING CENTER | 9160- | 01/19/2016 | 06/24/2016 | Select |

Entering Unmatched CBRS Enrollments

- * Upon selecting an enrollment, the bottom of the page will display a grid with the “Included Services For” and fill in the following data:
 - * From and To dates
 - * RS type (OT/PT/ST)
 - * Individual or Group
 - * Units (Frequency/Duration)
 - * Timespan (Weekly, Monthly, etc.)
 - * Click ADD
- * You will need to do this for each IEP ordered service included in the child's center-based program as listed on the IEP.
- * The last row is blank to add new rows
- * You can also edit existing rows

| Included Services for SCOTT, ANDREW | | | | | | | | |
|-------------------------------------|-----------|-----------|---------|--------|-------|---------|----------|------|
| ElectronicServiceID | From | To | RS Type | I or G | Units | Minutes | Timespan | |
| CPSECBRS0000004359 | 9/2/2015 | 6/24/2016 | OT | I | 2.00 | 30 | WEEKLY | Edit |
| CPSECBRS0000004360 | 9/2/2015 | 6/24/2016 | ST | I | 2.00 | 30 | WEEKLY | Edit |
| CPSECBRS0000004361 | 9/2/2015 | 6/24/2016 | PT | I | 2.00 | 30 | WEEKLY | Edit |
| | 1/19/2016 | 6/24/2016 | | | | | Weekly | Add |

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 |
|------------------------------|---------------|------------|----------|-------------|----------|----------------------|--------|---------|-------------|-------------|---------------------|---|
| Unmatched Enrollments | | | | | | | | | | | | |
| Retrieve | | | | | | | | | | | | |
| County | Last Name | First Name | DOB | School Year | From | To | Type | Service | Description | | | |
| WESTCHESTER | TRAMONTOZZI | LUKE | 12/23/13 | 2017/18 | 02/26/18 | 06/22/18 | RS | ST | 1x45 | Attendances | | Attempt Enrollment Match Delete |
| WESTCHESTER | Weintraub | Shoshana | 02/26/16 | 2019/20 | 09/03/19 | 06/26/20 | RS | ST | 2x45 | Attendances | Attempt Child Match | Delete |

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!

Entering Classroom Attendance

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

Filter Classrooms

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

| Attendance | Class | Description | School Year | Program | # Students | # Teachers | # Aides | | |
|------------|--------------------|-------------|--------------------|---------|------------|------------|---------|----------------|-----------------|
| Attendance | AQ - 1 AM (29:0:0) | AQ - 1 AM | 2019 - 2020 Winter | 9100 | 8 | 1 | 0 | Edit Classroom | Assign Children |
| Attendance | AQ - 2 (97:0:0) | AQ - 2 | 2019 - 2020 Winter | 9160 | 7 | 1 | 0 | Edit Classroom | Assign Children |
| Attendance | AQ - 3 AM (82:0:0) | AQ - 3 AM | 2019 - 2020 Winter | 9165 | 8 | 2 | 0 | Edit Classroom | Assign Children |

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) | |

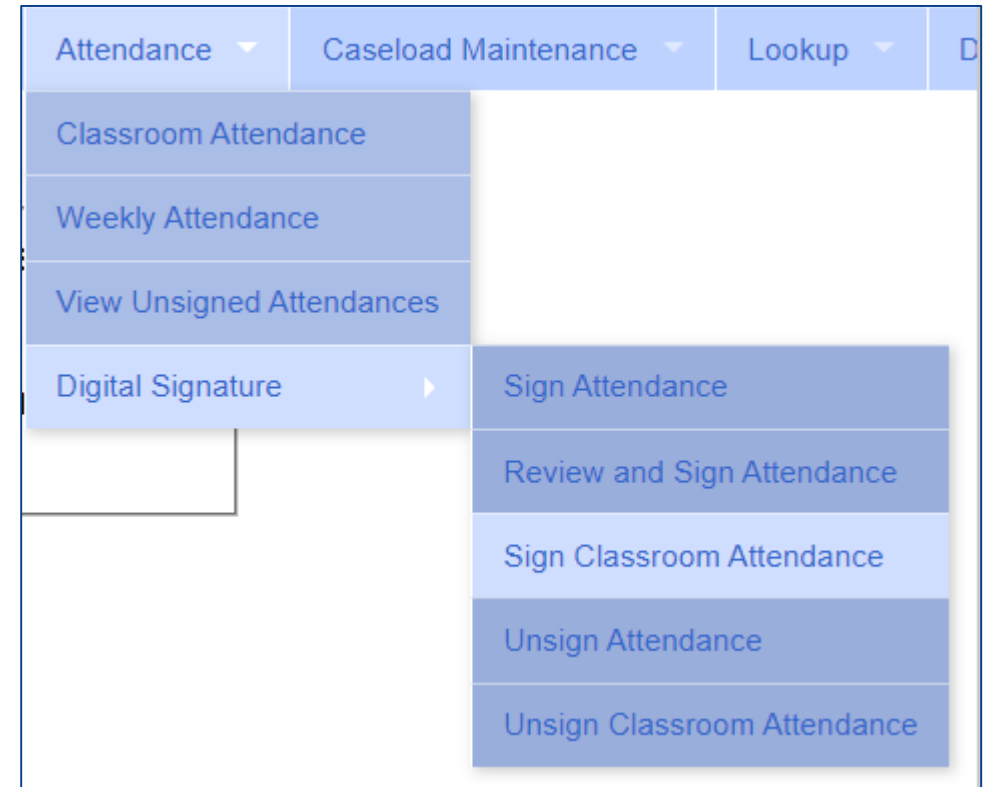
Entering Classroom Attendance

- * 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 all the children were present for a day click on the checkbox next to the day all the attendances will be highlighted in yellow.
- * 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.

| Tue <input checked="" type="checkbox"/> | Wed <input checked="" type="checkbox"/> | Thu <input checked="" type="checkbox"/> | Fri <input checked="" type="checkbox"/> |
|---|---|---|---|
| 05/26/20 | 05/27/20 | 05/28/20 | 05/29/20 |
| Green | Green | Green | Green |
| Red | Green | Green | Red |
| Red | Green | Green | Green |
| Green | Red | Red | Green |
| Green | Red | Green | Green |
| Green | Green | Green | Green |
| Green | Green | Green | Green |
| Green | Green | Red | Green |
| Total Sessions: 40 | | | |

Signing Classroom Attendance

- * 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”.

[illegible]

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.”

[illegible]

CB Enrollments Missing Attendance

- * There are several reasons why CB Enrollments may be missing attendances.
- * Here are the primary reasons:
 - * The attendance has been added or modified (matched, signed/co-signed)
 - * The attendance is on an unmatched enrollment (no ESID)
 - * Match to County Created enrollment
 - * The attendance is missing a Signed Date or Cosigned Date
 - * Have the therapist/supervisor sign or co-sign the attendance
 - * The rates have not yet been uploaded
 - * This can be checked by going to Lookup -> Enrollment Lookup -> Select the School Year Session, County, Provider, and Enrollment Type
 - * The column on the right that reads "Rates" will show if there is anything there other than \$0

CB Enrollments Missing Attendance

- * Use Child Lookup screen to find the child and click on the details to see the child details
- * On the Enrollment list for that child, find the enrollment corresponding to the attendances you want to bill
- * Make sure the row has an ESID (is a County created enrollment). If there is no ESID, it cannot be billed. You need to match this enrollment to a County created enrollment
- * Click the Attendance link to view the attendance list

Child Details (ORTEGA, RENE) [<< Back to Search Result](#)

DOB: 2/8/2012 Gender: M County: ERIE
Address: 3094 62nd Street District: Orchard Park
NY Matched?: Y

View information for School Year: 2015 - 2016 ▼

Enrollments

Strikethrough = The county deleted this enrollment

| Status | School Year | From | To | ESID | Provider | Enrollment | Service | Frequency | Individual Or Group | |
|--------|--------------------|----------|-----------|----------------|----------------------|------------|---------|-----------|---------------------|-------------|
| | 2015 - 2016 Winter | 2/2/2016 | 6/30/2016 | RS1516W0082830 | HIGHER LEARNING, LLC | RS | ST | 3x30 | I | Attendances |
| | 2015 - 2016 Winter | 9/1/2015 | 2/1/2016 | RS1516W0079642 | HIGHER LEARNING, LLC | RS | ST | 2x30 | I | Attendances |

CB Enrollments Missing Attendance

- * Make sure the attendance exists in the list.
 - * If it does not appear, then it is not in the system, or it is entered under a different child or different enrollment
- * Make sure there is a date in the Signed Date column
 - * If it is empty, have the therapist sign it
- * Make sure there is a date in the Co-Signed Date column (even if no co-signature is required for that therapist)
 - * If the therapist requires a co-signature, have the supervisor co-sign
 - * If the therapist does not require a co-signature, have the therapist make sure that their profile only lists their licensed credential (SLP and not TSHH). Have the therapist un-sign and resign.
- * Make sure the Voucher # is empty.
 - * If it is on another voucher that has not been submitted to the County you can edit that other vouchers details and remove it. If the voucher has been submitted to the County and the County denied it and you would like to rebill it, follow the rebilling process.

| Attendance List | | | | | | | | | | | | |
|--------------------------|---------|----------|-----------------------------|----------|--------------------------------|--------------|------------------|------------------------|---------|-------------|----------------|----------------|
| Child Name: ORTEGA, RENE | | | County: ERIE | | Provider: HIGHER LEARNING, LLC | | | District: Orchard Park | | | | |
| ESID: RS161750083890 | | | From/To: 7/1/2016-8/31/2016 | | Service: RS-ST (IND) | | | Frequency: 2x30 | | | | |
| Service Date | Make Up | Time In | Time Out | Duration | # Sess | Mins/Session | Service Provider | Setting | Ind/Grp | Signed Date | Co-Signed Date | Voucher # |
| 07/12/16 | | 11:00 AM | 11:30 AM | 30 | 1.00 | 30 | CECILA CUELLAR | Home | I | 07/12/16 | 07/12/16 | RS160731064200 |
| 07/14/16 | | 11:00 AM | 11:30 AM | 30 | 1.00 | 30 | CECILA CUELLAR | Home | I | | | |
| 07/26/16 | | 11:15 AM | 11:45 AM | 30 | 1.00 | 30 | CECILA CUELLAR | Home | I | | | |

Upcoming Webinars

- * Case Management (Independents)

- * 6/14 @ 11:00 am <https://attendee.gotowebinar.com/register/3094714430039910924>
- * 6/16 @ 3:00 pm <https://attendee.gotowebinar.com/register/8012755174292203278>

- * Case Management (Agency Service Providers)

- * 6/21 @ 11:00 am <https://attendee.gotowebinar.com/register/7116953364329283086>
- * 6/23 @ 3:00 pm <https://attendee.gotowebinar.com/register/4723130733198084624>

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:**
 - * Classroom Management
 - * <http://http://support.cpseportal.com/kb/a42/classroom-management.aspx>
 - * Creating a Schedule for the School
 - * <http://support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx?KBSearchID=16564>
 - * Entering Unmatched CBRS Enrollments
 - * <http://support.cpseportal.com/kb/a254/entering-unmatched-cbrs-enrollments.aspx?KBSearchID=16570>
 - * Entering Classroom Attendances
 - * <http://support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=16571>
 - * Articles on Unmatched Children/Enrollments:
 - * <http://support.cpseportal.com/kb/c11/enrollments.aspx>
- * Search for help in our **Knowledge Base:** <http://support.cpseportal.com/main/default.aspx>
- * Email the **CPSE Portal Support Team:** support@CPSEPortal.com