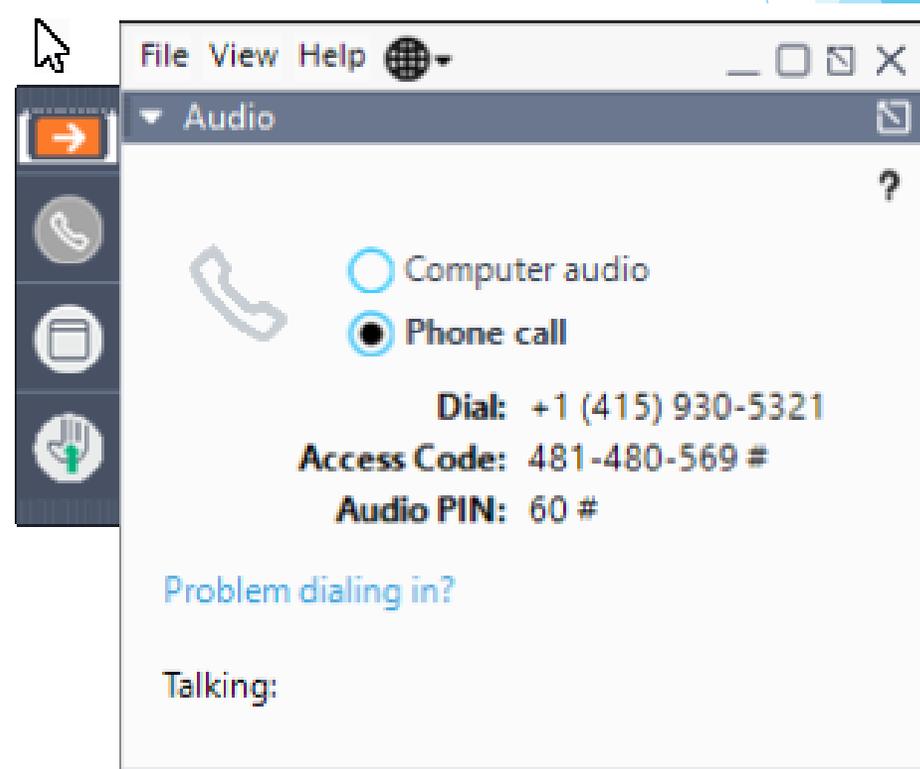


JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants

# 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

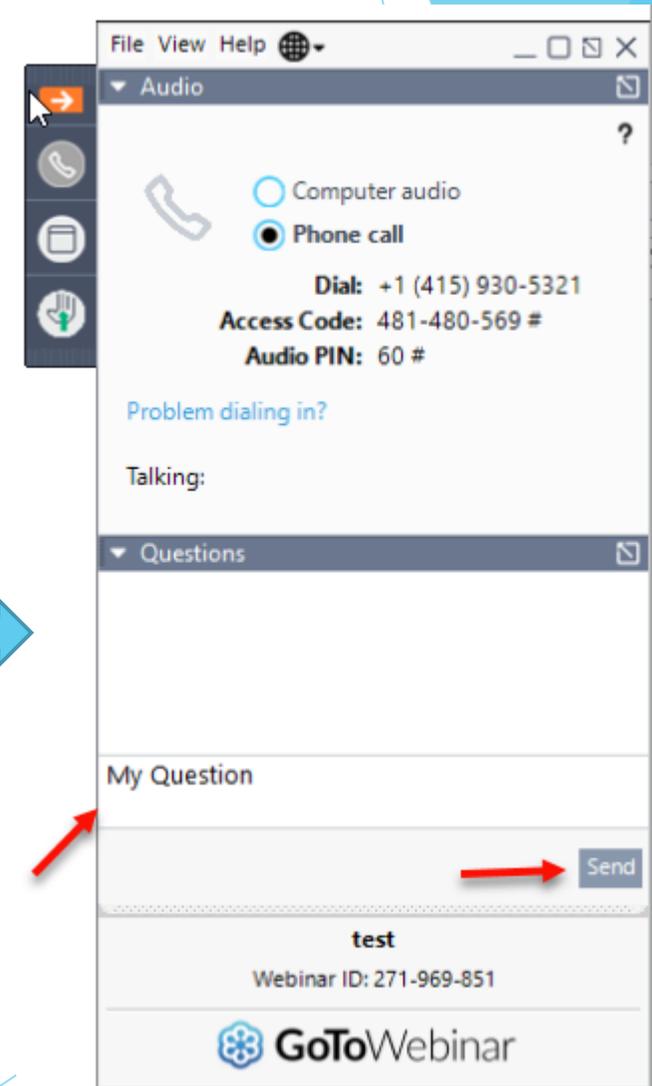
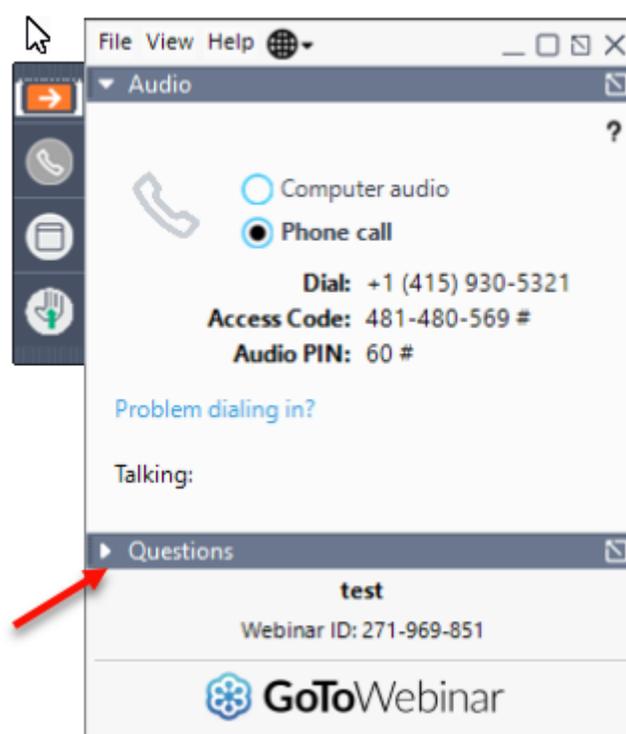


# Communicating with Presenter

- ▶ 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 Independents

# Topics

- ❖ Child Lookup
  - ❖ Advanced Search
- ❖ Unmatched Children and Enrollments
  - ❖ Adding an Unmatched Child
  - ❖ Editing an Unmatched Child
  - ❖ Adding an Unmatched Enrollment
  - ❖ View Unmatched Enrollments
  - ❖ Matching Children
  - ❖ Matching Enrollments
- ❖ Enrollment Lookup Report
  - ❖ How to find an ESID
- ❖ My Caseload
- ❖ Prescriptions for Caseload
- ❖ View Child Activities by Therapist
- ❖ Moving Attendances Between Enrollments

# 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	Details
SCHAFFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	<a href="#">Details</a>
SCHAFFER	LATRICIA	5/12/2011	F35053	Iroquois	ERIE	County Record	<a href="#">Details</a>
SCHMITT	FREDDIE	3/1/2012	G04529	Orchard Park	ERIE	County Record	<a href="#">Details</a>
SCHULZ	FREDDIE	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

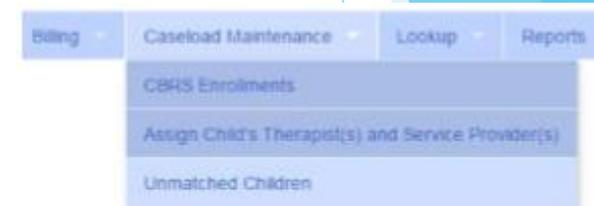
Name (Last,First)   [\[ Hide Advanced Search options \]](#)  
School Year  County  Provider  District   
Child Number  STAC ID  Electronic Service ID  Medicaid CIN

# 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

# Unmatched Children

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



Unmatched Children

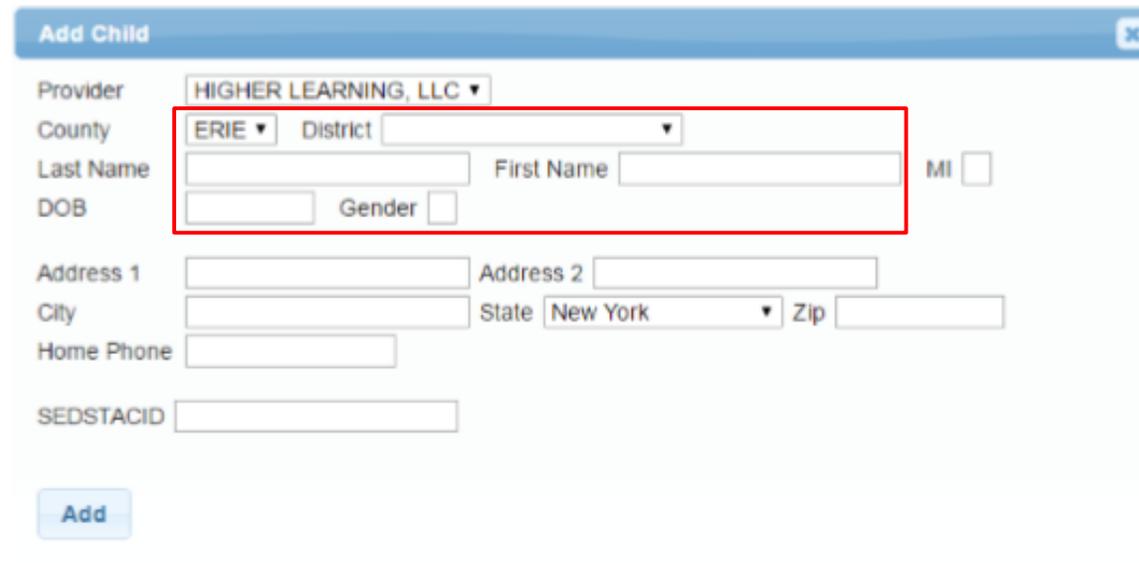
Add Child



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: HIGHER LEARNING, LLC (dropdown)
- County: ERIE (dropdown) and District: (dropdown) - These two fields are enclosed in a red rectangular box.
- Last Name: (text input) First Name: (text input) MI:
- DOB: (text input) Gender:
- Address 1: (text input) Address 2: (text input)
- City: (text input) State: New York (dropdown) Zip: (text input)
- Home Phone: (text input)
- SEDSTACID: (text input)

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 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 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	VENA		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	

# View Unmatched Enrollments

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

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	Delete
WESTCHESTER	Weintraub	Shoshana	02/26/16	201920	09/03/19	06/26/20	RS	ST	2x45	Attendances	Attempt Child Match		Delete

# 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
Select	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"/>	Weekly ▾	<input type="button" value="Add"/>							

# Matching Children

- ❖ Items 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

## Jnmatched Children

[Add Child](#)

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

- ❖ Or Attempt Child Match from View Unmatched Enrollments

## Jnmatched Enrollments

[Retrieve](#)

County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description	Attendances	Attempt Child Match	Delete
ERIE	BLUM	MERIL	03/24/12	201516	04/06/16	06/30/16	RS	PT	1x30			

# 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

Showing children matching the DOB, and with the same first  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 County 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.

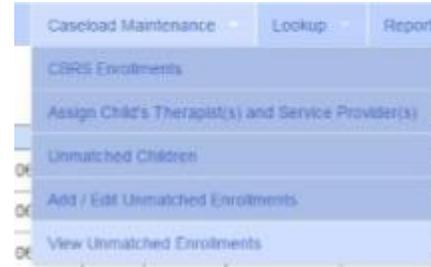
	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	BLUM	MERYL		3/24/2012	ERIE	Frontier	2250 STATE RTE 32		NY		

**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!

# Enrollment Lookup

❖ Lookup > Enrollment Lookup



❖ Choose filters, and click Search

**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	Attendances
	RS1516W0079786	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

Excel

# 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  County   CBRS

Provider   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

# 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
- ❖ **Do not email child names**, use the ESID

# 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	Strike
	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 the list of all enrollment

Enrollments

2015 - 2016 Winter ▾ ERIE ▾  CBRS  RS  SEIT  CB Search

HIGHER LEARNING, LLC ▾

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	Attendances
	RS1516W0079786	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

Excel

# My Caseload

❖ Attendance > My Caseload

Home File Transfer Attendance Billing Lookup Reports Medicaid

**Login Successful**  
You have logged in successfully

- My Caseload
- Service Attendance

## My Caseload

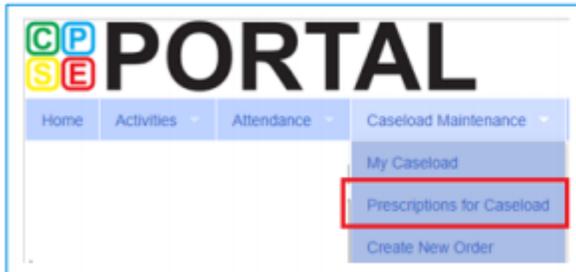
2014 - 2015 Winter

Search

ESID	Last Name	First Name	County	Provider	District	Enrollment Type	RS Type	From Date	To Date	Frequency	Individual Or Group	
RS1415W0010987	ATKINS	Sakina	SCHENECTADY	TrainingProvider100	ROTTERDAM-MOHONASEN CSD	RS	ST	2/2/2015	6/25/2015	1x30	I	Attendances
RS1415W0011238	BANK	Shays	SCHENECTADY	TrainingProvider100	SCHALMONT CSD	RS	ST	6/15/2015	6/25/2015	2x30	I	Attendances
RS1415W0010516	BIANCHINI	Nirob	SCHENECTADY	TrainingProvider100	ROTTERDAM-MOHONASEN CSD	RS	ST	9/3/2014	6/25/2015	2x30	I	Attendances
RS1415W0017483	MANNIX	Klay	Albany	TrainingProvider100	GUILDERLAND CSD	RS	ST	9/2/2014	6/19/2015	2x30	I	Attendances
RS1415W0017279	NYAHAY	Mikiala	Albany	TrainingProvider100	GUILDERLAND CSD	RS	ST	9/2/2014	6/19/2015	2x30	I	Attendances
RS1415W0017284	NYAHAY	Mikiala	Albany	TrainingProvider100	GUILDERLAND CSD	RS	COR	9/2/2014	6/19/2015	1x30 MONTHLY	I	Attendances
RS1415W0010461	SACCONE	Mahlania	SCHENECTADY	TrainingProvider100	ROTTERDAM-MOHONASEN CSD	RS	ST	9/3/2014	6/25/2015	2x30	I	Attendances

# Prescriptions for Caseload (SLPs ONLY)

- ❖ Caseload Maintenance > Prescriptions for Caseload



**Use this option for initial prescriptions.**

- ❖ Caseload Maintenance > Create New Order



**Use this option for subsequent prescriptions – e.g., when there is a change in service and a previous Rx already exists.**

# Prescriptions for Caseload (SLPs ONLY)

- ❖ Caseload Maintenance > Prescriptions for Caseload
- ❖ Here you can find:
  - ❖ A list of children on your caseload
  - ❖ Status of your prescription (Entered, Verified, Invalidated, Missing)
  - ❖ Existing Speech Recommendations and enrollments that need one
- ❖ If you click on “VIEW” for the Rx Image, you will be able to view or print the digital speech recommendation

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
			9/8/2020	6/25/2021	ST 1x30 Individual	VERIFIED	View	View	
RS2021W01			9/8/2020	6/25/2021	ST 1x60 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
RS2021W01			9/8/2020	6/25/2021	ST 1x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

Link is removed when Rx is completed.

# View Child Activities by Therapist

❖ Reports > Therapist Activity

❖ Filter by

- ❖ Provider
- ❖ Therapist
- ❖ School Year
- ❖ Enrollment
- ❖ To and From Dates



## View Child Activities by Therapist

Filters

Provider  Therapist  School Year  Enrollment   
From Date  To Date

Show Notes  Include Attendance / Treatment Logs

# View Child Activities by Therapist

## View Child Activities by Therapist

Filters

Provider: MID-HUDSON VALLEY EEC Therapist: Goldman, Emily School Year: 2020 - 2021 Enrollment: [ ]

From Date: 09/06/2020 To Date: 10/28/2020

Show Notes  Include Attendance / Treatment Logs  [Search](#)

[Excel](#)

Child	Service Provider	County	ESID	Enrollment Description	Activity	Attendance Type	Date	Start Time	End Time	Duration	Sessions To Bill	Notes
[REDACTED]	[REDACTED] Emily	DUTCHESS	CBRS2021W [REDACTED]	CBRS (ST1) 9101-I 1x30 - G - (09/09/2020-06/24/2021)	Attendance	Provided Treatment Session	9/14/2020	8:30 AM	9:00 AM	30	1.00	Attendance Log Note: Various constructive toys presented (e.g. potato head, blocks, etc). Targeted turn- taking and requesting objects during functional play. Given indirect verbal cues and modeling, [REDACTED] was able to engage with a peer and verbally object and comment in 6/10 trials.
[REDACTED]	[REDACTED] Emily	DUTCHESS	CBRS2021W [REDACTED]	CBRS (ST1) 9101-I 1x30 - G - (09/09/2020-06/24/2021)	Attendance	Provided Treatment Session	9/14/2020	8:30 AM	9:00 AM	30	1.00	Attendance Log Note: Various constructive toys presented (e.g. potato head, blocks, etc). Targeted turn- taking and requesting objects during functional play. Given direct verbal cues and modeling, [REDACTED] was able to engage cooperatively in 3/5 trials. Direct verbal cues were required to decrease self-directed behavior and balance interaction with her peers.
[REDACTED]	[REDACTED] Emily	DUTCHESS	CBRS2021W [REDACTED]	CBRS (ST1) 9101-I 1x30 - G - (09/09/2020-06/24/2021)	Attendance	Provided Treatment Session	9/14/2020	8:30 AM	9:00 AM	30	1.00	Attendance Log Note: Various constructive toys presented (e.g. potato head, blocks, etc). Targeted greeting and requesting objects during functional play. Given discrete trial instruction, [REDACTED] was able to greet peers 3X, but did not establish eye contact. She required consistent verbal prompting as well as tactile and positional cues to request necessary materials and eliminate self directed behaviors in 5/10 trials.
[REDACTED]	[REDACTED] Emily	DUTCHESS	CBRS2021W [REDACTED]	CBRS (ST1) 9100-I 1x30 - G - (09/09/2020-06/24/2021)	Attendance	Provided Treatment Session	9/14/2020	8:30 AM	9:00 AM	30	1.00	Attendance Log Note: Various constructive toys presented (e.g. potato head, blocks, etc). Targeted turn- taking and requesting objects during functional play. Given discrete trial training, [REDACTED] requested toys from peers in 6/10 trials, but did not initiate interaction. Level of prompting was faded to indirect verbal cues following multiple examples of target behavior.
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Attendance Log Note: [REDACTED] was presented with preferred toy to establish baseline language skills during symbolic play task. He was able to engage

# Moving Attendances Between Enrollments

- ❖ Attendance > Move Attendance Between Enrollments
- ❖ You can search by:
  - ❖ School Year
  - ❖ Provider
  - ❖ Last Name
- ❖ Click “Show All”

A screenshot of a search filter interface. It contains three dropdown menus: '2014 - 2015 Winter', 'TrainingProvider135', and 'Last Name'. To the right of these is a radio button for 'Problems Only' and a radio button for 'Show All', which is selected. A red arrow points to the 'Show All' radio button. A 'Search' button is located to the right of the radio buttons. The entire search area is enclosed in a red rectangular border.

# Moving Attendances Between Enrollments

- ❖ Click “Select” next to Enrollment

2014 - 2015 Winter TrainingProvider135 Last Name:   Problems Only  Show All

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	Select
2014 - 2015 Winter	Albany	ALBANY CITY SD	TrainingProvider135	CB1415W0009941	AGULNICK	Yekutiel	CB	2/2/2015	6/24/2015		2.5 hrs/day		Select
2014 - 2015 Winter	Albany	ALBANY CITY SD	TrainingProvider135	CBRS1415W0001814	AGULNICK	Yekutiel	CBRS	2/2/2015	6/24/2015	ST	2x30		Select

- ❖ Check the box next to the attendance
- ❖ Click on “Select” next to the applicable enrollment
- ❖ Click “Move” to move the attendances to the enrollment

Selected Enrollment Info

Service Date	Service Provider	Individual Or Group	County	District	ESID	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group
<input checked="" type="checkbox"/> 5/5/2015	Mary Patricia NICHOLS	G	Select Albany	ALBANY CITY SD	CBRS1415W0001820	CBRS	9/3/2014	6/24/2015	ST	4x30	

Attendance  Enrollment

- ❖ Confirmation of move: Attendances moved successfully.

# Upcoming Webinars

- ❖ **Case Management for Agency Service Providers -**

- ❖ **6/21/21@11:00 am**

- <https://attendee.gotowebinar.com/register/7116953364329283086>

- ❖ **6/23/21 @3:00 PM**

- <https://attendee.gotowebinar.com/register/4723130733198084624>

- ❖ **Session Notes -**

- ❖ **6/24/21 @11:00 AM**

- <https://attendee.gotowebinar.com/register/9182413444899452688>

- ❖ **7/6/2021 @3:00 PM**

- <https://attendee.gotowebinar.com/register/3895287537924674064>

# 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>
  - ❖ How to look up a child by ESID:  
<http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid-.aspx>
  - ❖ Moving Attendances Between Enrollments:  
<http://support.cpseportal.com/kb/a53/move-attendance-between-enrollments.aspx?KBSearchID=16851>
- ❖ Email the CPSE Portal Support Team: [support@CPSEPortal.com](mailto:support@CPSEPortal.com)