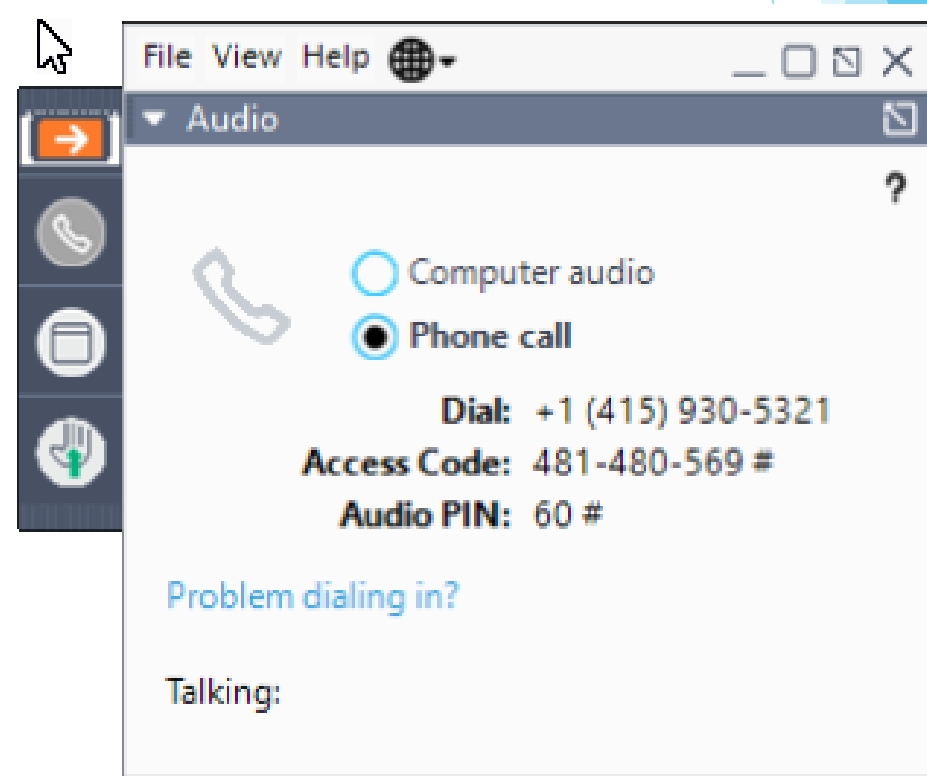
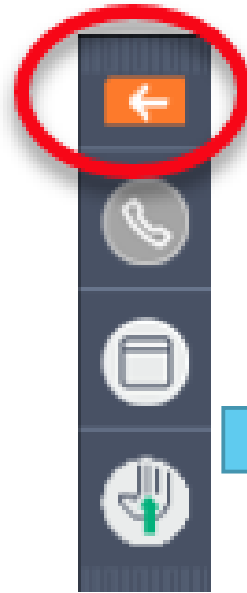


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

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

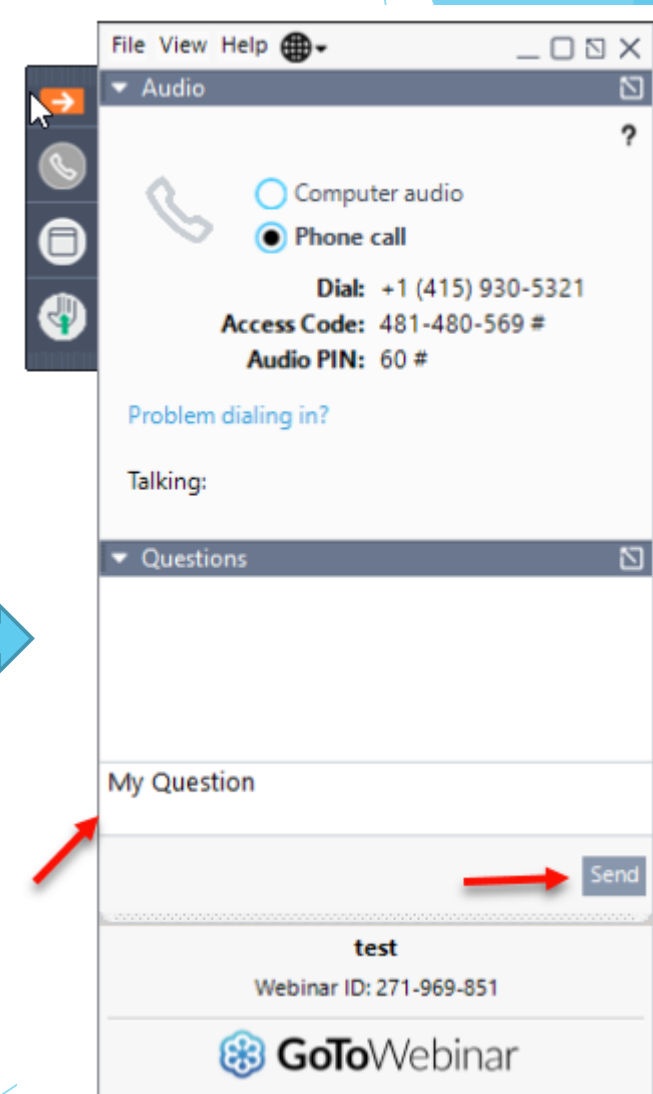
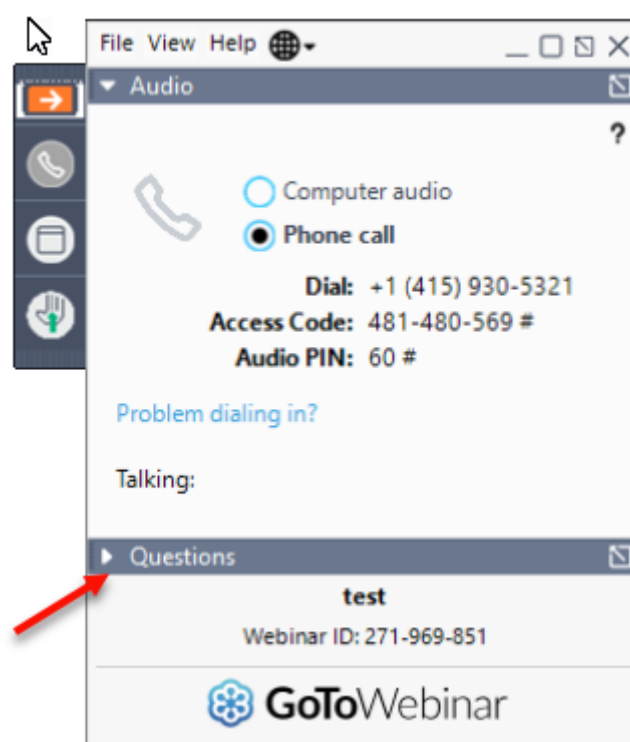


Communicating with Presenter

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

| Last Name | First Name | DOB | SED STAC ID | District | County | Match Status | Details |
|-----------|------------|-----------|-------------|--------------|--------|---------------|-------------------------|
| SCHAFER | FRANCIS | 2/11/2010 | E23693 | East Aurora | ERIE | County Record | 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

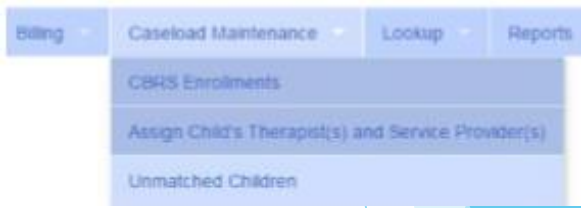
Child Number STAC ID Electronic Service ID Medicaid CIN

Unmatched Children 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

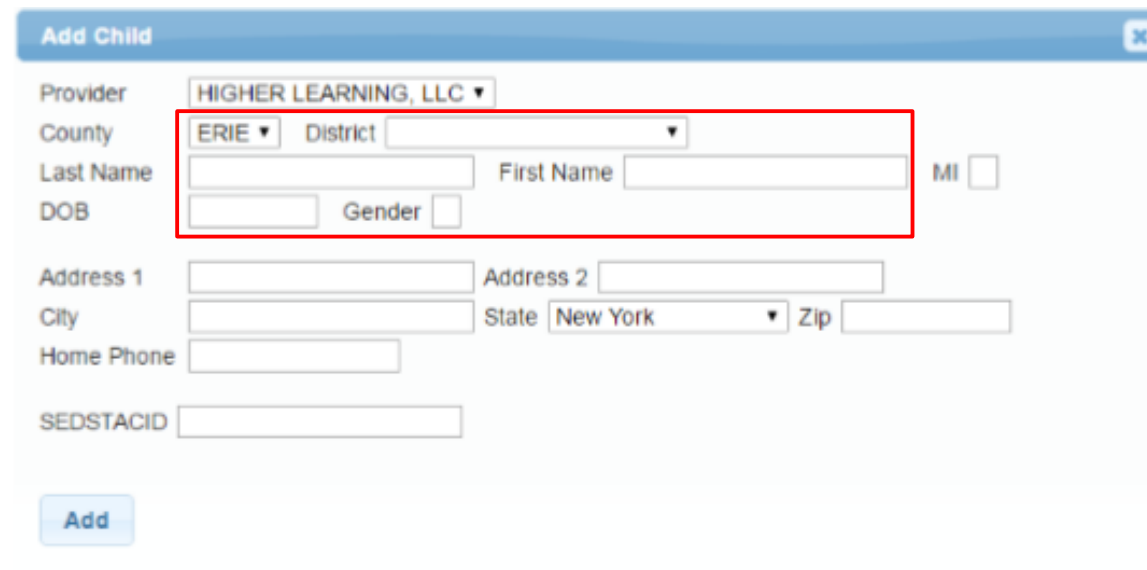
Add Child



| 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: 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 checkbox.
- Address 1: A text input field.
- Address 2: A text input field.
- City: A text input field.
- State: A dropdown menu showing "New York".
- Zip: A text input field.
- Home Phone: A text input field.
- SEDSTACID: A text input field.

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

Editing an Unmatched Child

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

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

- ❖ You can edit

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

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

Adding an Unmatched Enrollment

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

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

Adding 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 | IVENA | | 5/29/2011 | ERIE | North Collins | | | NY | | | Enrollments | Attempt Match | Edit | Delete |

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

Unmatched Enrollments

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

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

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 | 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"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | Weekly ▼ | <input type="button" value="Add"/> |

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

Unmatched 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 | Frontier | | | NY | | | | | | |

- ❖ Or Attempt Child Match from View Unmatched Enrollments

Unmatched 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 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 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!

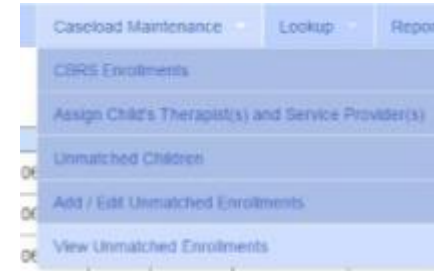
Matching Enrollments

- ❖ 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

☒ 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 | |
|-----------|----------------|-----------|------------|--------|----------------------|----------|-----------------|---------|----------|-----------|-----------|---------------------|---------|-------------|
| | RS1516W0060337 | 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 2019 - 2020 Winter County DUTCHESS

Provider LG INTERVENTION SPECIALISTS, INC.

☐ CBRs

☒ 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



| 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

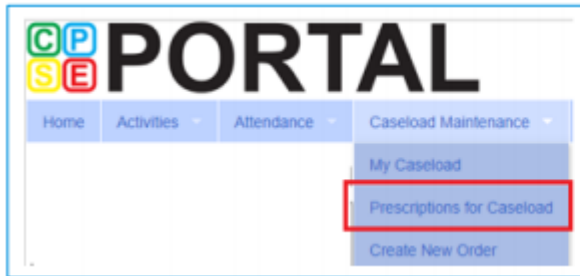
2014 - 2015 Winter

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 |

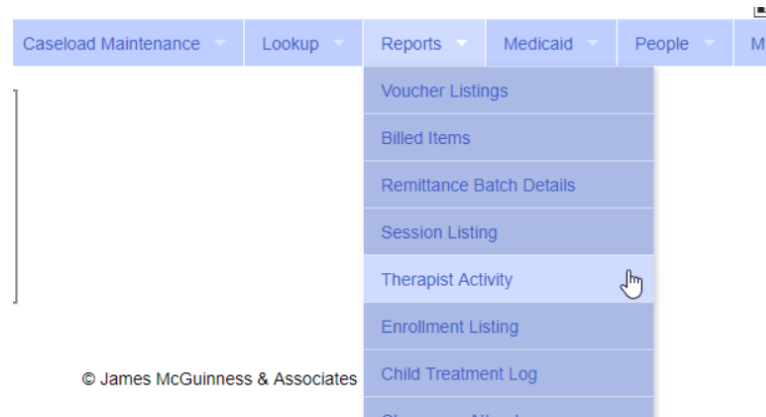
Link is removed when
Rx is completed.

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

[Home](#) [Activities](#) [IEP](#) [eSTACs](#) [Attendance](#) [Billing](#) [Lookup](#) [Documents](#) [Reports](#) [Maintenance](#) [Medicaid Service Bureau](#) [Medicaid](#) [People](#) [My Account](#) [Knowledge Base](#)

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 | ServiceProvider | County | ESID | EnrollmentDescription | Activity | AttendanceType | Date | Start Time | End Time | Duration | SessionsToBill | Notes |
|-------|-----------------|----------|-----------|--|------------|----------------------------|-----------|------------|----------|----------|----------------|--|
| | Emily | DUTCHESS | CBRS2021W | 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, was able to engage with a peer and verbally object and comment in 6/10 trials. |
| | Emily | DUTCHESS | CBRS2021W | 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, 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. |
| | Emily | DUTCHESS | CBRS2021W | 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, 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. |
| | Emily | DUTCHESS | CBRS2021W | 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, 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. |
| | | | | | | | | | | | | Attendance Log Note: 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 includes a dropdown menu for '2014 - 2015 Winter', a dropdown menu for 'TrainingProvider135', a text input field for 'Last Name', and two radio buttons: 'Problems Only' and 'Show All'. A red arrow points to the 'Show All' radio button. A 'Search' button is located to the right of the radio buttons.

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 | |
|--------------------|--------|----------------|---------------------|------------------|-----------|------------|-----------------|-----------|-----------|---------|-------------|---------------------|--------|
| 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 type="checkbox"/> 5/5/2015 | Mary Patricia NICHOLS | G | Select Albany | ALBANY CITY SD | CBRS1415W0001820 | CBRS | 5/3/2014 | 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