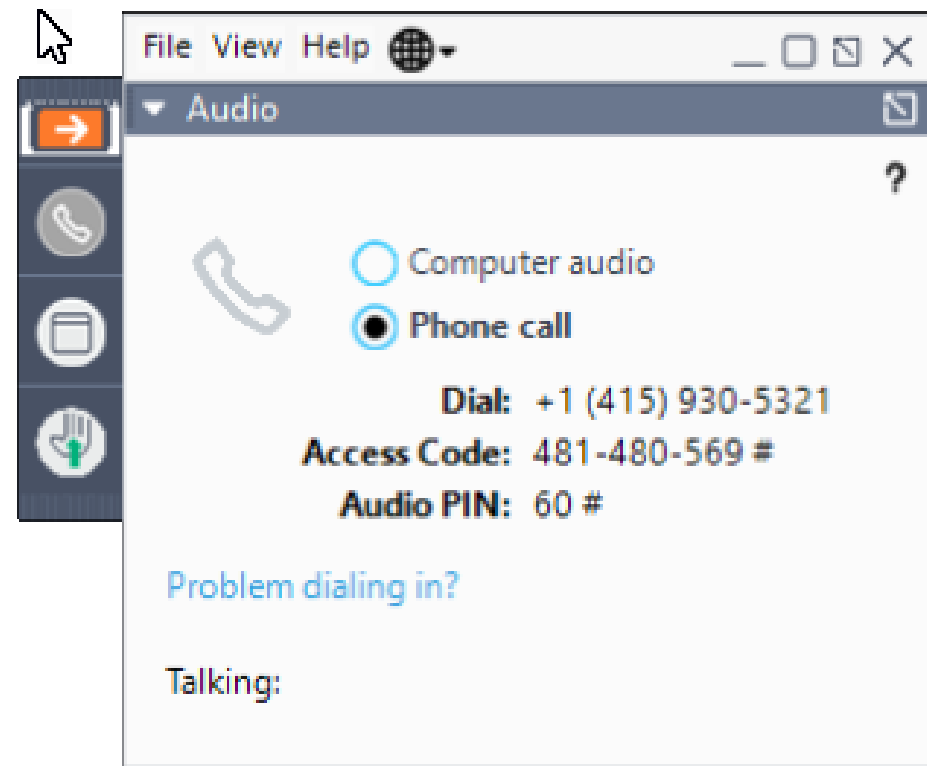


JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants

# 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

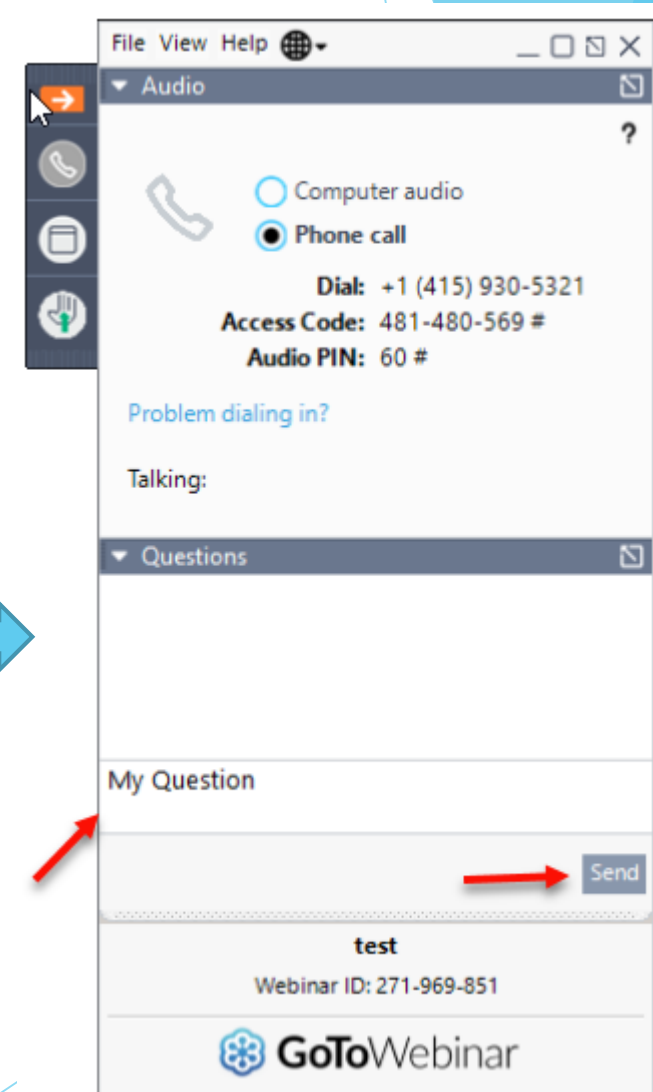
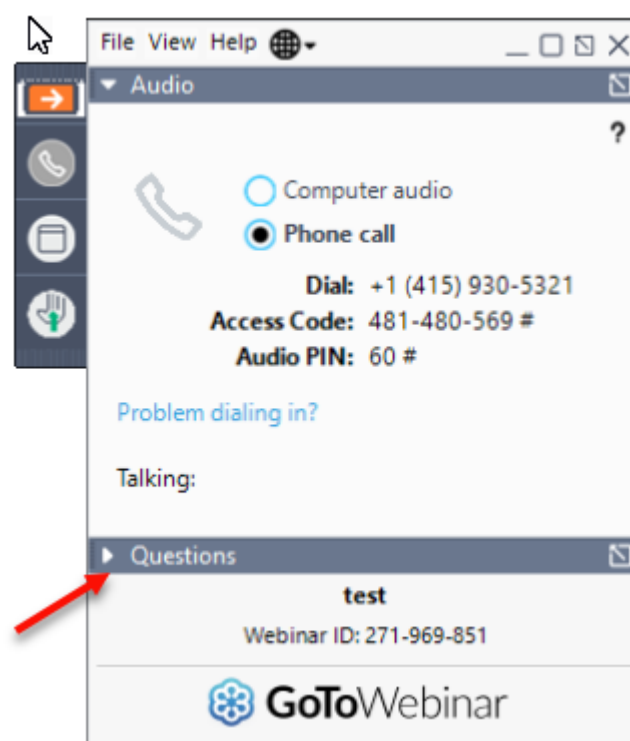


# Communicating with Presenter

- ▶ 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

Agency Service Providers

# 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	FREDERIC	3/3/2011		Buffalo	ERIE	County Record	<a href="#">Details</a>
SCHULZ	JONNIE	12/5/2009	E34929	Orchard Park	ERIE	County Record	<a href="#">Details</a>
SCHUSTER	JACQUELINE	1/28/2011	F67096	Buffalo	ERIE	County Record	<a href="#">Details</a>
SCHUSTER	MARGARITE	3/30/2012	F67281	Buffalo	ERIE	County Record	<a href="#">Details</a>

# Child Lookup Advanced Search

- ❖ Click “Show Advanced Search options” to see additional search criteria:

## Child Lookup

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



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

## Child Lookup

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

School Year  County  Provider  District

Child Number  STAC ID  Electronic Service ID  Medicaid CIN

# Enrollment & ESID

- ❖ The enrollment should correspond to a unique approved service on the IEP. Separate enrollments for
  - ❖ Different service types (OT vs PT vs ST)
  - ❖ Different frequencies (1x30 vs 1x45 vs 2x30) (if the CPSE alters the IEP and changes the frequency during the year, a new enrollment should be created)
  - ❖ Individual vs Group (if the CPSE determine a child should receive some individual and some group of the same service type, they should be separate enrollments)
- ❖ Each County created enrollment has a unique identifier called an Electronic Service Identifier or ESID for short. This is how we reference enrollments
- ❖ For HIPPA reasons, **do not email child names**, use the ESID, the Child Number, the STAC ID



# 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 List

**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

The screenshot shows a navigation bar with the following items: Home, File Transfer, Attendance, Billing, Lookup, Reports, and Medicaid. The 'Attendance' dropdown menu is open, showing 'My Caseload' and 'Service Attendance' as options. Below the navigation bar, a message reads: 'Login Successful' followed by 'You have logged in successfully'.

## My Caseload

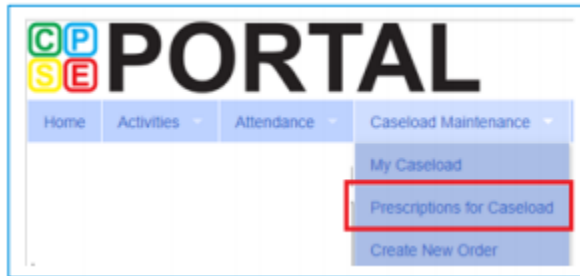
2014 - 2015 Winter

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	Service Provider	County	ESID	Enrollment Description	Activity	Attendance Type	Date	Start Time	End Time	Duration	Sessions To Bill	Notes
[REDACTED]	[REDACTED] Emily	DUTCHESS	[REDACTED] 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, [REDACTED] was able to engage with a peer and verbally object and comment in 6/10 trials.
[REDACTED]	[REDACTED] Emily	DUTCHESS	[REDACTED] 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, [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	[REDACTED] 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, [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	[REDACTED] 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, [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.
												Attendance Log Note: [REDACTED] was presented with preferred toy to establish baseline language skills during symbolic play task. He was able to engage

# Upcoming Webinars

- ❖ Session Notes

- ❖ 6/24 @ 11:00 am

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

- ❖ 7/6 @ 3:00 pm

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

- ❖ Billing (Agencies and Independents Using an Outside system)

- ❖ 8/9 @ 2:30 pm

- <https://attendee.gotowebinar.com/register/3999682867140069136>

# 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>
- ❖ Email the CPSE Portal Support Team: [support@CPSEPortal.com](mailto:support@CPSEPortal.com)