

## SUPERVISION QUICK REFERENCE GUIDE

The options for entering a Supervision Plan are noted below:

- 1) **Select the Service Provider and Supervisor** (Supervision Plan)
  - a. Go to Medicaid or Caseload Maintenance>**Supervision**>**Supervision Plans**>Filter>Retrieve
  - b. Copy Plans from a Prior Session or Create Plans from Pre-License Plans (if there are any Plans to copy)
  - c. If there are no Plans from a Prior Session or Pre-License Plans to copy, select the Supervisor & Service Provider from the respective drop-downs (and click **Add**) to create the Supervision Plan.
  - d. Click the **Details** Link at the end of the row on the **Supervision Plan Listing Screen** to assign the enrollment to the Supervision Plan.
- 2) **Assign the Enrollment Plan (child & enrollment) to the Supervision Plan** (Service Provider & Supervisor)

**Create Plans Manually:** (Use this option if the **supervisee** has **multiple supervisors** that supervise different children on their caseload.)

  - a. Click the **Details** Link at the end of the row on the **Supervision Plan Listing Screen** to assign the child/enrollment to the Supervision Plan
  - b. Click the **"Add a Supervision Plan for an Enrollment"** button (to create Plans manually)
  - c. Select the specific Supervision Plan (Service Provider/Supervisor) in the **Supervision Plan drop-down**
  - d. Select all the children and enrollments that apply to the specific (selected) Supervision Plan
  - e. Click **"Create Enrollment Supervision Plans"** button

**Create Plans with Auto Create:** (Use this option if the supervisor is the **supervisor for ALL of the children** on the supervisee's caseload.)

  - a. Click the **Details** Link at the end of the row on the **Supervision Plan Listing Screen**.
  - b. Click the **"Auto Create Enrollment Plans"** button (to create Plans Automatically)
  - c. Click on the **Add/View Face to Face Meeting Dates** Link to add the observation dates.
- 3) **Create Multiple Plans (with one click) / Enter the Face-to-Face Meeting Date**  
(Medicaid or Caseload Maintenance >Supervision>**Enrollment Needing First Visit**)  
**(This Option Is Highly Recommended for creating Supervision Plans.)**
  - a. Filter for County, Provider, School Year Session, Click the **Missing** Radio Button, Click **Retrieve**
    - i. Click all of the **ADD** Links in the grid, which will create multiple Supervision/Enrollment Plans. After all of the **ADD** links have been clicked, all of the **ADD** links will change to **Plan Details** and an **Add Meeting Date** link will appear in the last column.
    - ii. After all of the Supervision/Enrollment Plans are created (there will be a **Plan Details** link in each row)
  - b. Click the **Add Meeting Date** Link at the end of the row to enter the Face-to-Face date for each enrollment
  - c. Enter the meeting date in the data entry box and click the **Update** link at the end of the row.
- 4) **Upload the Required Audit Documentation (Supervision>Supervision Plans)**
  - a. Click the **Details** Link at the end of the row on the **Supervision Plan Listing Screen**
  - b. Click the Supervision Documents Tab
  - c. Click Choose File
  - d. Select Document Type
  - e. Click Upload Document  
(If you need to upload documentation for a specific child, you will need to select a **child-specific** document type and then select the specific child from the drop-down list.)