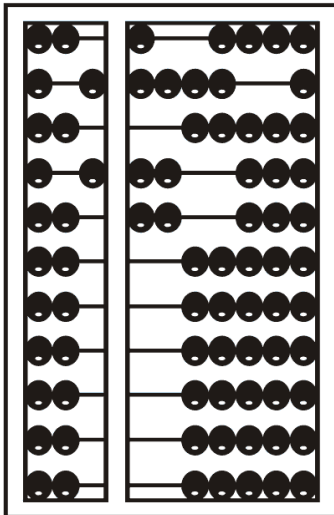


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



CPSE Portal Case Management for Agency Service Providers



What are Unmatched Children and Unmatched Enrollments?

Unmatched Children & Enrollments

- * Typically, all information about a child and the services they are receiving are entered by the County and uploaded into CPSE Portal.
 - * However, your agency can create a temporary child and temporary enrollment records.
 - * These are created when the County is delayed in entering data.
 - * Your agency can create these records so that attendance and other information can be recorded even though the County has not entered the official information.
- * Once the County uploads the official information, then you can “match” the temporary records to the County created record. When matching the records, any data entered for the temporary record is moved over to the County created record and then the temporary one is deleted.
- * In CPSE Portal, these temporary / placeholder entries are referred to as “UnMatched”.
- * Unmatched children do not have an ESID #.

Enrollment and ESID

- * The enrollment should correspond to a unique approved service on the IEP.
- * There will be enrollments for:
 - * Different Service Types (OT vs PT vs ST)
 - * Different frequencies (1x30 vs 1x45 vs 2x30)
 - * Individual vs Group (if the CPSE determines 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, or the STAC ID #..



Prescriptions

For SLP's ONLY

Creating Digital Orders (SLP's)

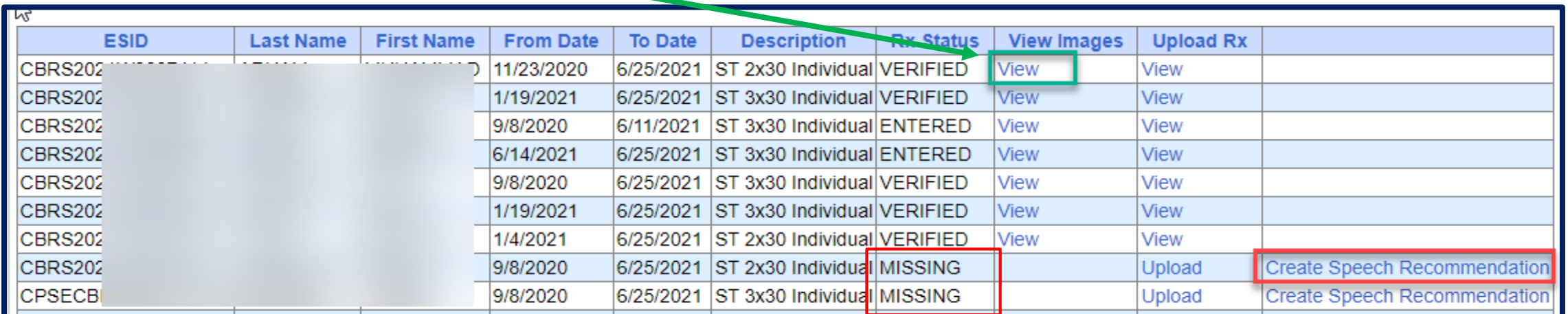
- * Go to **Caseload Maintenance** -> **Prescriptions for Caseload**
 - * Use this option for initial prescriptions.
- * Go to **Caseload Maintenance** -> **Create New Order**
 - * Use this option for subsequent prescriptions:
 - * Example: when there is a change in service and a previous prescription already exists.

<http://support.cpseportal.com/kb/a160/creating-digital-speech-recommendations-slps.aspx?KBSearchID=19946>



Prescriptions for Caseload (SLPs)

- * Go to **Caseload Maintenance -> Prescriptions for Caseload**
- * Here you will find:
 - * A list of children on your caseload,
 - * Status of your prescription,
 - * Existing Speech Recommendations and enrollments that need an RX.
- * If you click on “View”, you will be able to view or print the digital speech recommendation.



ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	View Images	Upload Rx	
CBRS202			11/23/2020	6/25/2021	ST 2x30 Individual	VERIFIED	View	View	
CBRS202			1/19/2021	6/25/2021	ST 3x30 Individual	VERIFIED	View	View	
CBRS202			9/8/2020	6/11/2021	ST 3x30 Individual	ENTERED	View	View	
CBRS202			6/14/2021	6/25/2021	ST 3x30 Individual	ENTERED	View	View	
CBRS202			9/8/2020	6/25/2021	ST 3x30 Individual	VERIFIED	View	View	
CBRS202			1/19/2021	6/25/2021	ST 3x30 Individual	VERIFIED	View	View	
CBRS202			1/4/2021	6/25/2021	ST 2x30 Individual	VERIFIED	View	View	
CBRS202			9/8/2020	6/25/2021	ST 2x30 Individual	MISSING		Upload	Create Speech Recommendation
CPSECB			9/8/2020	6/25/2021	ST 3x30 Individual	MISSING		Upload	Create Speech Recommendation

Create New Order

- * Go to **Caseload Maintenance -> Create New Order**
- * Search for child, and choose “Select”.

Create Digital Order

Child Lookup

Name (Last,First)a

Search

Hide Advanced Search options]

School Year County Provider District

Child Number STAC ID Electronic Service ID

Add Unmatched Child

	Child Number	Last Name	First Name	DOB	CIN	District	County	Match Status	
Select	C28000251			9/3/2019		EAST MEADOW UFSD	NASSAU	County Record	Details
Select	C28000240			7/16/2019		UNIONDALE UFSD	NASSAU	County Record	Details

Create Digital Order

- * Enter your Date Range, ICD Code, and click “*Preview and Sign*”.
- * This will then ask for your PIN #.

The screenshot shows a web form titled "Create Digital Order". At the top, there is a "Child Lookup" section with a blurred name field, "County: SCHENECTADY", "District: Schenectady", "DOB: 5/6/2015", and a "Redo Search" button. Below this is a section for "Create recommendation for Speech Services" with a dropdown menu. The "Prescription effective date range" section is highlighted with a red box and contains three radio button options: "Applies to entire school year" (selected) with a "2021 - 2022" dropdown, "Applies to specific school year / session" with a "2021 - 2022 Winter" dropdown, and "Applies to specific date range" with two empty date input fields. The "Reason for Services" section is also highlighted with a red box and includes an "ICD" search field with the placeholder "Search by code or description...", a "Reason" text input field, and a "Preview and Sign" button at the bottom, which is also highlighted with a red box.

Digital Speech Recommendation Webinar

- * **Digital Speech Recommendations: (ALL SLP's)**
- * (*Digital Recommendations are required for all Speech Services. A prescription/digital order is required in order to submit billing in the Portal.)
- * **Wednesday, June 12, 2024 @ 2:00 PM**
 - * <https://attendee.gotowebinar.com/register/7972863814377293915>
- * **Friday, June 14, 2024 @ 3:30 PM**
 - * <https://attendee.gotowebinar.com/register/4765822592131430230>
- * **Wednesday, August 7, 2024 @ 2:00 PM**
 - * <https://attendee.gotowebinar.com/register/972493182653085273>
- * **Friday, August 9, 2024 @ 3:30 PM**
 - * <https://attendee.gotowebinar.com/register/881641636361597019>
 - * **Topics:**
 - * Benefits to Using the Digital Speech Recommendation
 - * Required Elements of a Written Order
 - * One-Time Set-up
 - * How to Create the Digital Speech Recommendation
 - * Reports
 - * Unmatched Children & Enrollments
 - * OPRA



Reports

My Caseload

- * Go to **Caseload Maintenance** -> **My Caseload**
- * You can also see all of the attendances that you have entered for each child.
- * You will also see the ESID # of your students.



My Caseload

Filter By

Provider: Session: 2021 - 2022 Winter

	Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned		
<input type="checkbox"/>		RS2122W0001572			COLUMBIA		NEW LEBANON CSD	RS	12/06/21	06/24/22	OT 1x30 Individual	YES	Attendances	Defaults
<input type="checkbox"/>		CPSECBRS0000118175			Albany		RAVENA-COEYMANS-SELKIRK CSD	CBRS	03/21/22	06/24/22	OT 1x30 Individual	YES	Attendances	Defaults
<input type="checkbox"/>		RS2122W0001529			COLUMBIA		NEW LEBANON CSD	RS	09/08/21	06/24/22	OT 2x30 Individual	YES	Attendances	Defaults
<input type="checkbox"/>		CBRS2122W0001937			COLUMBIA		GERMANTOWN CSD	CBRS	12/06/21	06/24/22	OT 2x30 Individual	YES	Attendances	Defaults

Excel

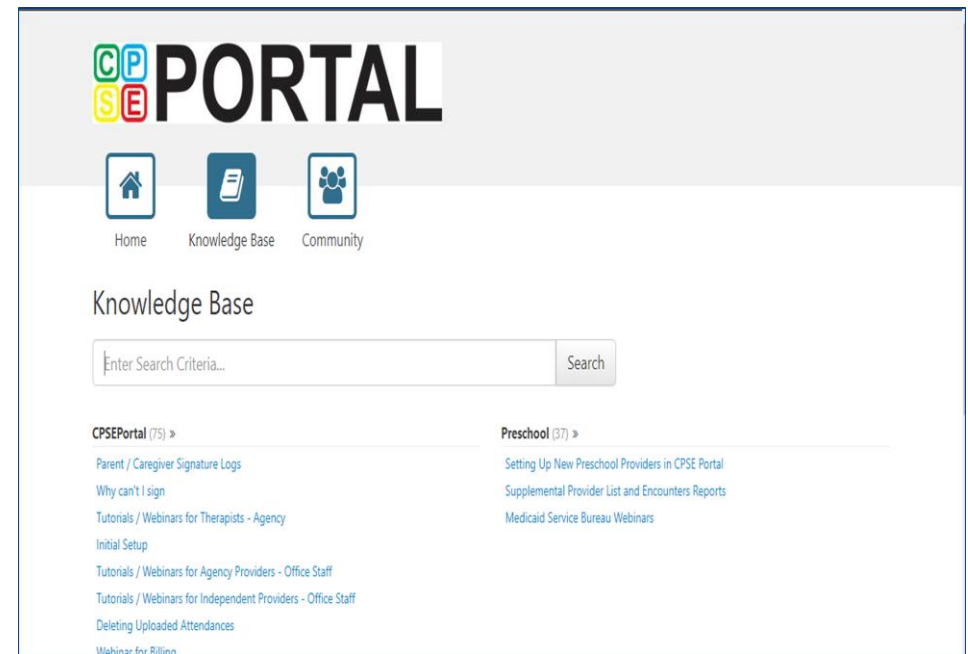
Generate Blank Signature Logs for Selected Enrollments



Closing

Portal Training – Knowledge Base

- * The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Portal support.
- * You can simply click the Knowledge Base tab in the Portal or you can go to:
- * <http://support.cpseportal.com/kb>



Knowledge Base Links

- * Creating Digital Speech Recommendations (SLPs):
 - * <http://support.cpseportal.com/kb/a160/creating-digital-speech-recommendations-slps.aspx?KBSearchID=19946>

Upcoming Webinars

CPSE Portal Session Notes: **Everyone**

- * **Monday, June 3, 2024 @ 10:00AM**
 - * <https://attendee.gotowebinar.com/register/3805382693043269977>
- * **Wednesday, June 5, 2024 @ 4:00PM**
 - * <https://attendee.gotowebinar.com/register/3585126324743933789>
- * **Topics:**
 - * *Recap Entering/Signing Classroom Attendance*
 - * *Attendance Entry Record*
 - * *Signing Attendance/Review & Sign*
 - * *Co-Signing Session Notes/Attendance*
 - * *Un-signing Attendance/Making Corrections After Signing*
 - * *Move Attendances Between Enrollments*
 - * *Print Child Treatment Log*
 - * *Print Parent Signature Log*

Closing remarks

- * CPSE Portal Address (you may want to bookmark):
<https://www.cpseportal.com>
- * In addition to the Portal Knowledge base, our Helpdesk is available through email at support@CPSEPortal.com
 - * When sending an email:
 - * Do not use child's name
 - * Use STAC ID # or ESID #
 - * Include your county, and info needed