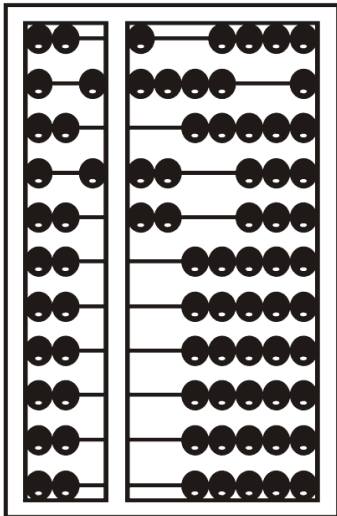
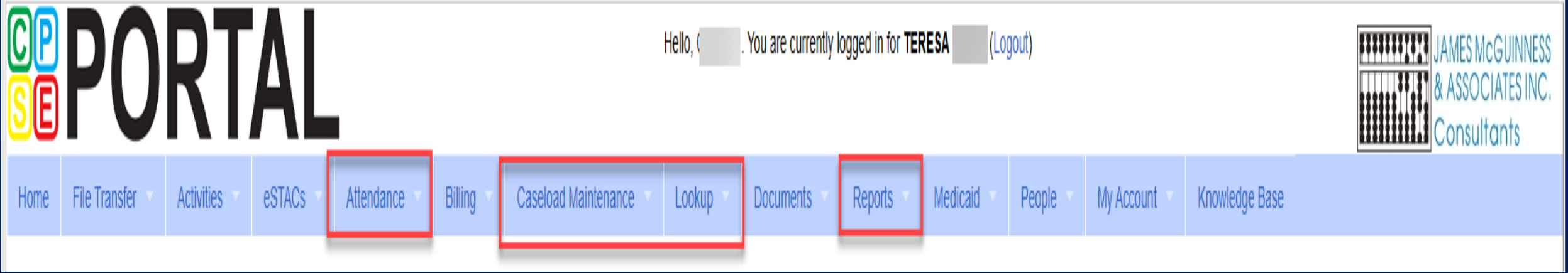


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



CPSE Portal Center Based (CB) Agency Case Management

Tabs Covered In Webinar



The screenshot shows the top navigation bar of the CPSE Portal. The header includes the 'CPSE PORTAL' logo on the left, a user login status 'Hello, [redacted]. You are currently logged in for TERESA [redacted] (Logout)' in the center, and the 'JAMES McGUINNESS & ASSOCIATES INC. Consultants' logo on the right. Below the header is a horizontal menu bar with various tabs. Three tabs are highlighted with red rectangular boxes: 'Attendance', 'Caseload Maintenance', and 'Reports'. Each tab has a small downward arrow indicating a dropdown menu.

CPSE PORTAL

Hello, [redacted]. You are currently logged in for **TERESA** [redacted] (Logout)

JAMES McGUINNESS & ASSOCIATES INC. Consultants

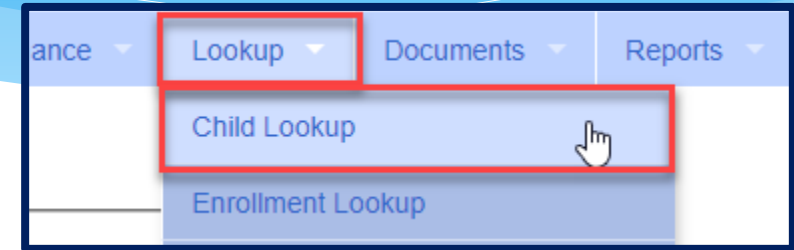
Home | File Transfer ▾ | Activities ▾ | eSTACs ▾ | **Attendance ▾** | Billing ▾ | **Caseload Maintenance ▾** | **Lookup ▾** | Documents ▾ | **Reports ▾** | Medicaid ▾ | People ▾ | My Account ▾ | Knowledge Base



How To Look Up Children In The Portal

Child Lookup

- * Go to **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 [\[Show Advanced Search options \]](#)

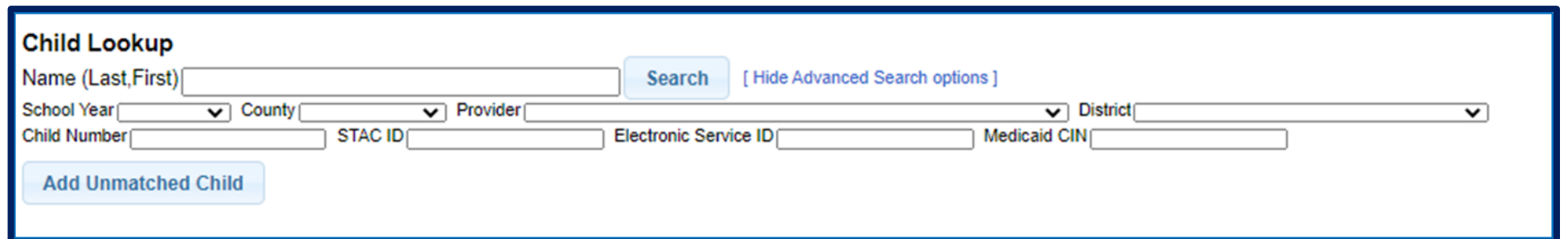
Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	
SCHAFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	Details
SCHAFFER	LATRICIA	5/12/2011	F35053	Iroquois	ERIE	County Record	Details
SCHMITT	FREDDIE	3/1/2012	G04529	Orchard Park	ERIE	County Record	Details
SCHULZ	FREDERIC	3/3/2011		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

- * You can also lookup children by other information.
- * Click “**Show Advanced Search options**” to see additional search criteria:
 - * School Year
 - * County
 - * Provider
 - * District
 - * STAC ID #
 - * Electronic Service ID #



This screenshot shows the basic 'Child Lookup' form. It includes a title 'Child Lookup', a text input field for 'Name (Last,First)', a 'Search' button, and a link '[Hide Advanced Search options]' which is highlighted with a red rectangle.



This screenshot shows the advanced 'Child Lookup' form. It includes the same title and name field as the basic form, but also features a 'Search' button, a '[Hide Advanced Search options]' link, and several additional search criteria: 'School Year' (dropdown), 'County' (dropdown), 'Provider' (text input), 'District' (dropdown), 'Child Number' (text input), 'STAC ID' (text input), 'Electronic Service ID' (text input), and 'Medicaid CIN' (text input). At the bottom, there is an 'Add Unmatched Child' button.



Unmatched Children and Unmatched Enrollments

Unmatched Children & Enrollments

- * Typically, all information about a child and the services they are receiving are entered into eSTACs by the school district. The County then uploads from their Preschool system into the CPSE Portal.
 - * However, an agency can create a temporary child and temporary enrollment records.
 - * These are created when the school district is delayed in entering data.
 - * The 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, the agency 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 # (Electronic Service ID Number)

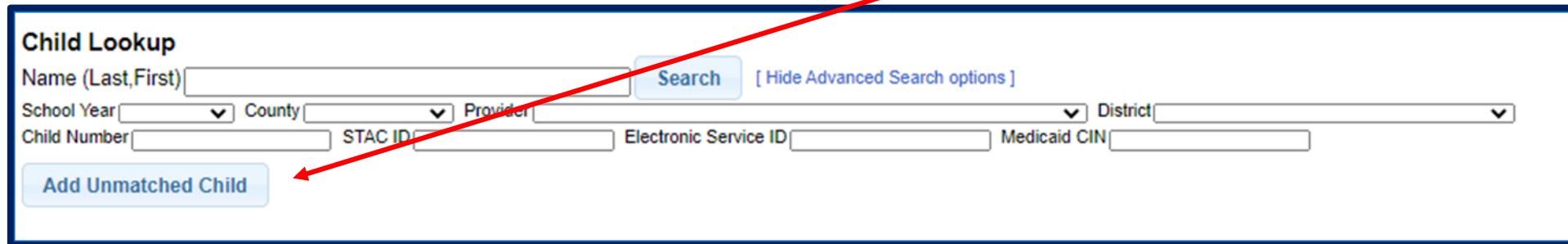
- * The enrollment should correspond to a unique approved service on the IEP.
- * There will be enrollments for:
 - * Different Service Types (OT vs PT vs ST)
 - * Different frequencies (1x30 vs 1x45 vs 2x30)
 - * Individual vs Group (if the CPSE determines a child should receive some individual and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



Creating Unmatched Children

Creating an Unmatched Child Under the Lookup Tab

- * You can add an Unmatched Child two different ways.
- * Go to **Lookup -> Child Lookup** and search for the child.
- * If the child is not in the Portal, you can then click on “Add Unmatched Child”.



The screenshot shows the 'Child Lookup' interface. It includes a search bar for 'Name (Last,First)' with a 'Search' button and a link to '[Hide Advanced Search options]'. Below the search bar are several dropdown menus for 'School Year', 'County', 'Provider', and 'District'. At the bottom, there are input fields for 'Child Number', 'STAC ID', 'Electronic Service ID', and 'Medicaid CIN'. A blue button labeled 'Add Unmatched Child' is located at the bottom left. A red arrow points from the text 'Add Unmatched Child’' in the list above to this button.

Creating an Unmatched Child Under the Caseload Maintenance Tab

- * Go to **Caseload Maintenance** -> **Unmatched Children** and click “Add Child”
- * Fill in the “Add Child” screen and click “Add” (address & phone # are optional)
- * The child will then be given a child #.

Add Child

Provider

County District

Last Name First Name MI

DOB Gender

Address 1 Address 2

City State Zip

Home Phone

SEDSTACID

Add

Editing an Unmatched Child

Unmatched Children															
Add Child															
Child Number	Last Name	First Name	MI	DOB	Gender	County	District	Address1	City	State	Zip	HomePhone			
C14000241462	LACY	IVORY		10/1/2019	m	ERIE	Cheektowaga-Sloan						Enrollments	Attempt Match	Edit
C40000198044	PEARCE	BERYL		11/15/2018	F	NIAGARA	NIAGARA FALLS CITY SD						Enrollments	Attempt Match	Delete
C40000190740	RANGEL	LONDON		2/23/2017	M	NIAGARA	NORTH TONAWANDA CITY SD						Enrollments	Attempt Match	Delete

- * Go to **Caseload Maintenance** -> **Unmatched Children**
- * You can Edit:
 - * Child's Name
 - * Date of Birth
 - * District
- * Click **"Update"** to save your changes.

Unmatched Children															
Add Child															
Child Number	Last Name	First Name	MI	DOB	Gender	County	District	Address1	City	State	Zip	HomePhone			
C14000241462	LACY	IVORY		10/1/2019	m	ERIE	Cheektowaga-Sloan						Enrollments	Attempt Match	Update
C40000198044	PEARCE	BERYL		11/15/2018	F	NIAGARA	NIAGARA FALLS CITY SD						Enrollments	Attempt Match	Delete
C40000190740	RANGEL	LONDON		2/23/2017	M	NIAGARA	NORTH TONAWANDA CITY SD						Enrollments	Attempt Match	Delete



Creating Unmatched Enrollments

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 the **Unmatched Children** page or
 - * You can go to the **Add/Edit Unmatched Enrollments** page.
- * For a County-created child, you can only use the **Add/Edit Unmatched Enrollments** page.



Adding Unmatched Enrollments from the Unmatched Children Screen

- * You can add an enrollment by choosing the “Enrollments” button on your unmatched child (CB, SEIT or RS). Go to **Caseload Maintenance -> Unmatched Children**.

Unmatched Children

Add Child

Child Number	Last Name	First Name	MI	DOB	Gender	County	District	Address1	City	State	Zip	HomePhone				
C14000241462	LACY	IVORY		10/1/2019	m	ERIE	Cheektowaga-Sloan						Enrollments	Attempt Match	Edit	Delete

- * Enter all data on the blank row and click “Add”.

Unmatched Enrollments

LACY, IVORY County: ERIE District: Cheektowaga-Sloan DOB: 10/1/2019

Redo Search

Provider	Session	From	To	CB/SEIT/RS	OT/PT/ST	I or G	Frequency/Duration					
				Enrollment Type	RS Type		Units	Minutes	Timespan			
BUFFALO HEARING & SPEECH CENTER, INC	2022 - 2023 Winter	9/5/2022	6/18/2023	CB		I	5.00	300	Weekly	Edit	Attempt Match	Add CBRS
BUFFALO HEARING & SPEECH CENTER, INC									Weekly	Add		

CB
RS
SEIT

Adding Unmatched Enrollments from the Add/Edit Unmatched Enrollments Screen

- * You can also go to **Caseload Maintenance -> Add/Edit Unmatched Enrollments**

- * Search child's name, and click "Select"

- * Fill in all of the pertinent information in the table:

- * Provider, Session, From/To Dates, Enrollment Type, RS Type, I or G, Units, Minutes, Timespan)

- * Click "Add"

- * All of the information entered should match the IEP.

Unmatched Enrollments

Name (Last,First) [Show Advanced Search options]

Unmatched Enrollments

LACY, IVORY County: **ERIE** District: **Cheektowaga-Sloan** DOB: **10/1/2019**

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan				
BUFFALO HEARING & SPEECH CENTER, INC	2022 - 2023 Winter	9/5/2022	6/18/2023	CB		I	5.00	300	Weekly	<input type="button" value="Edit"/>	<input type="button" value="Attempt Match"/>	<input type="button" value="Add CBRS"/>	<input type="button" value="Delete"/>
<input type="text" value="BUFFALO HEARING & SPEECH CENTER, INC"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Weekly"/>	<input type="button" value="Add"/>			

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Adding Unmatched Center Based Related Services

- * If you have a child that is in a Center Based (CB) program, not only will you need to create the Unmatched CB Enrollment, but you will also need to create all of the Center Based Related Services (CBRS) that are listed on the IEP.
- * There are two different screens that can be used to create the CBRS Unmatched Related Services.

Adding an Unmatched Enrollment(s) For Center Based Related Services (**ONLY**)

- * After you create the CB unmatched enrollment, now click on “Add CBRS” to add all of the CBRS unmatched enrollments.
- * **REMEMBER** – all of your unmatched CBRS enrollments will need to be under the unmatched CB enrollment.

Unmatched Enrollments

LACY, IVORY County: **ERIE** District: **Cheektowaga-Sloan** DOB: **10/1/2019**

[Redo Search](#)

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan				
BUFFALO HEARING & SPEECH CENTER, INC	2022 - 2023 Winter	9/5/2022	6/18/2023	CB		I	5.00	300	Weekly	Edit	Attempt Match	Add CBRS	Delete
<div>BUFFALO HEARING & SPEECH CENTER, INC ▼</div>	<div>▼</div>	<div></div>	<div></div>	<div>▼</div>	<div>▼</div>	<div>▼</div>	<div></div>	<div></div>	<div>Weekly ▼</div>	<div>Add</div>			

Adding an Unmatched Enrollment(s) (Center Based Related Service)

- * This will show the unmatched CB enrollment at the top, and all of the CBRS unmatched enrollments will be added at the bottom.

CB Enrollments Unmatched CB Enrollment for Ivory Lacy

Session Provider County Last Name First Name DOB Search Clear

County	District	Last Name	First Name	ElectronicServiceID	Provider	Program	Start Date	End Date	
ERIE	Cheektowaga-Sloan	LACY	IVORY		BUFFALO HEARING & SPEECH CENTER, INC	-I	09/05/2022	06/18/2023	Select

Showing top 25 results...

Included Services for LACY, IVORY Enter all of the CBRS Unmatched Enrollment(s) for the child

ElectronicServiceID	From	To	RS Type	I or G	Units	Minutes	Timespan	
CPSECBRS0000124611	9/5/2022	6/18/2023	PT	I	2.00	30	WEEKLY	Edit Delete
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add

OT1, PT1 & ST1 are group services

Adding an Unmatched Enrollment(s) For Center Based Related Services (**ONLY**)

- * After you create the unmatched CB Enrollment, you can also create the CBRS by going to **Caseload Maintenance -> CBRS Enrollments**.
- * Complete all of the information needed to search:
 - * Session, County, Last Name, First Name & DOB and search.



CB Enrollments

Session Provider County Last Name First Name DOB

Four red arrows point upwards to the Session, County, Last Name, and First Name fields.

Adding an Unmatched Enrollment (For Center Based Related Services)

CB Enrollments Unmatched CB Enrollment for Ivory Lacy

Session Provider County Last Name First Name DOB Search Clear

County	District	Last Name	First Name	ElectronicServiceID	Provider	Program	Start Date	End Date	
ERIE	Cheektowaga-Sloan	LACY	IVORY		BUFFALO HEARING & SPEECH CENTER, INC	-I	09/05/2022	06/18/2023	Select

Showing top 25 results...

Included Services for LACY, IVORY Enter all of the CBRS Unmatched Enrollment(s) for the child

ElectronicServiceID	From	To	RS Type	I or G	Units	Minutes	Timespan	
CPSECBRS0000124611	9/5/2022	6/18/2023	PT	I	2.00	30	WEEKLY	Edit Delete
	<input type="text" value="9/5/2022"/>	<input type="text" value="6/18/2023"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WEEKLY <input type="text"/>	Add

OT1, PT1 or ST1 are group services

Completed Unmatched Enrollment for Center Based and Center Based Related Services

CB Enrollments

Session Provider County Last Name First Name DOB

County	District	Last Name	First Name	ElectronicServiceID	Provider	Program	Start Date	End Date	
ERIE	Cheektowaga-Sloan	LACY	IVORY		BUFFALO HEARING & SPEECH CENTER, INC	-I	09/05/2022	06/18/2023	Select

Showing top 25 results...

Included Services for LACY, IVORY

ElectronicServiceID	From	To	RS Type	I or G	Units	Minutes	Timespan		
CPSECBRS0000124611	9/5/2022	6/18/2023	PT	I	2.00	30	WEEKLY	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CPSECBRS0000124612	9/5/2022	6/18/2023	OT1	G	1.00	30	WEEKLY	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CPSECBRS0000124613	9/5/2022	6/18/2023	ST	I	4.00	30	WEEKLY	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CPSECBRS0000124614	9/5/2022	6/18/2023	ST1	G	1.00	30	WEEKLY	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
	<input type="text" value="9/5/2022"/>	<input type="text" value="6/18/2023"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	WEEKLY <input type="text"/>	<input type="button" value="Add"/>	

Completed Unmatched CBRS Enrollments for Ivory Lacy

OT1, PT1 or ST1 are group services



Assigning Therapist to Children

Assigning Enrollments to Therapist or Assign Therapist to Child

- * This function can be done two different ways.
 - * 1. The agency can select the therapist, and assign children to the therapist's caseload by choosing specific students.
 - * This is very helpful at the beginning of the school year when there are many children that need to be assigned to the therapist.
 - * 2. The agency can select one child, and assign each therapist to the specific service.
 - * This is more common when there is a new student entering during the year.
- * Therapist's must be assigned to the child/enrollment in order for the therapist to create session notes.

Assigning Enrollments to Therapist (Assign multiple children to one therapist)

- * Go to **Caseload Maintenance -> Caseload**
 - * Select therapist under “Person” dropdown and click “Retrieve”. This will bring up the therapist’s caseload.
 - * Click “Add New Assignment”.
 - * Filter by Enrollment Type, Service Type, or Last Name and click “Retrieve” to bring up any enrollments that fit the filter description.

Filter By

Provider: BUFFALO HEARING & SPEECH CENTER, INC School Year Session: 2019 - 2020 Winter Person: [Dropdown]

Retrieve

Associates

- BOYKIN, DORTHY
- BRANCH, FRANCESCA
- BRANDON, UNA
- BRAUN, REYNA
- BRAVO, MAYA
- BRIGHT, LETA
- BROUSSARD, HAYDEE
- BROWNING, MINERVA
- BURKS, KERRIE

Status	Last Name	First Name	ESID	From	To	Enrollment Type	RS Type	Freq	I/G	Provider	County	District	Source	Defaults
<input type="checkbox"/>	DA		CBRS2425WC	10/21/24	06/26/25	CBRS	PT	2x30	I		ERIE	Buffalo	ASSIGNED	Attendance Defaults
<input type="checkbox"/>	RD		CBRS2425WC	11/25/24	06/26/25	CBRS	PT	2x30	I		ERIE	Buffalo	ASSIGNED	Attendance Defaults
<input type="checkbox"/>			CBRS2425WC	11/25/24	06/26/25	CBRS	PT	2x30	I		ERIE	Buffalo	ASSIGNED	Attendance Defaults
<input type="checkbox"/>	LIN		CBRS2425WC	09/11/24	06/26/25	CBRS	PT	2x30	I		ERIE	Buffalo	ASSIGNED	Attendance Defaults

Add New Assignment Excel Generate Blank Signature Logs for Selected Enrollments Remove Checked From Caseload

Assign Cases To Dana [Redacted] for the 202425 WIN session

Filter By...

Enrollment Type: (Any Enrollment Type) Service Type: (All Service Types) Last Name: [Redacted]

Items Per Page 50

Retrieve

Assign Selected to Dana [Redacted]

Return to Caseload

Assigning Enrollments to Therapist

- * Select the enrollments that you want to assign to this therapist, and click “Assign Selected To [Therapist’s Name]”.
- * Click “Return to Caseload” to return to the previous therapist search page.

Filter By... Enrollment Type: (Any Enrollment Type) Service Type: PT Last Name: Items Per Page 50

Assign Selected to Dana Return to Caseload

	Status	Last Name	First Name	ESID	From	To	Enrollment Type	RS Type	Freq	I/G	Provider	County	District	
<input type="checkbox"/>			AH	CBRS2425W00	9/5/2024	11/24/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			AH	CBRS2425W00	11/25/2024	6/26/2025	CBRS	PT	1.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			AH	CBRS2425W00	11/25/2024	6/26/2025	CBRS	PT	1.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			NDA	CBRS2425W00	9/17/2024	10/20/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			HAM	CBRS2425W00	9/9/2024	11/24/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			HAM	CBRS2425W00	11/25/2024	6/26/2025	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			RI	CBRS2425W00	9/5/2024	12/31/2024	CBRS	PT	3.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			RI	CBRS2425W00	1/2/2025	6/26/2025	CBRS	PT	3.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			IARD	CBRS2425W00	9/5/2024	11/24/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			ON	CBRS2425W00	9/6/2024	11/24/2024	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance
<input type="checkbox"/>			ON	CBRS2425W00	11/25/2024	6/26/2025	CBRS	PT	2.00x 30 WEEKLY	I		ERIE	Buffalo	Attendance

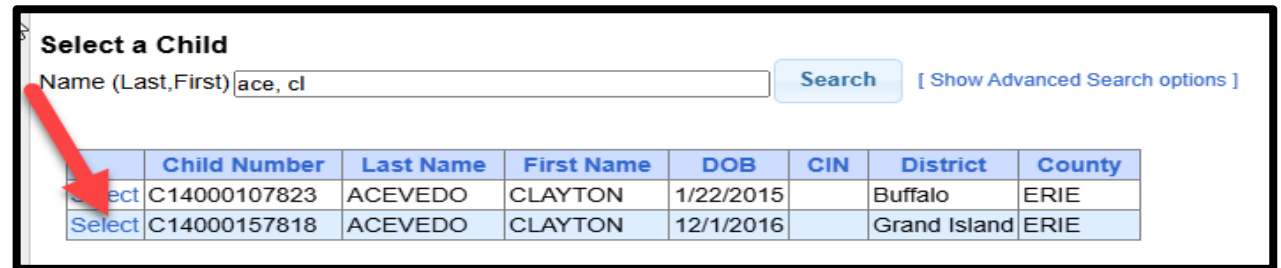
Assigning Children to Therapist (Assign one child to multiple services)

- * Go to **Caseload Maintenance** -> **Assign Child's Therapist(s) and Service Provider(s)**.



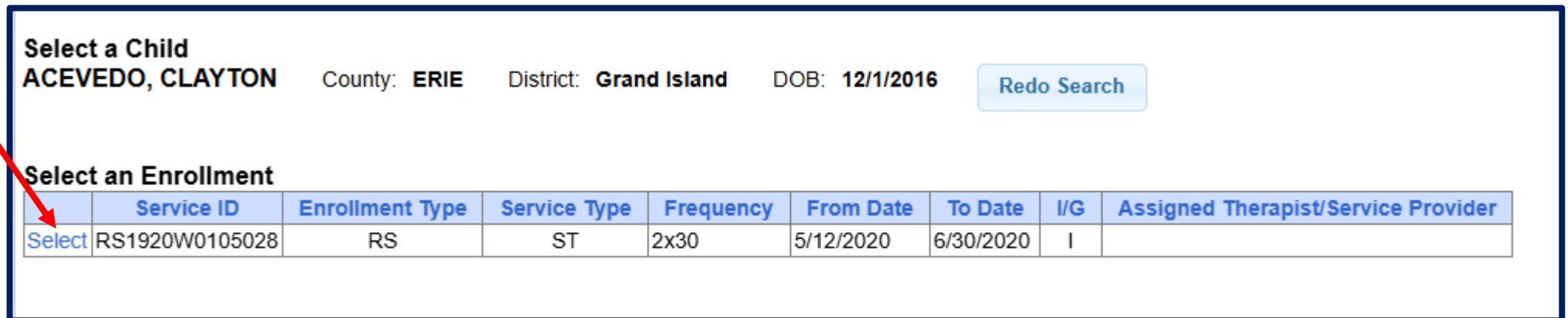
A screenshot of a software menu. The 'Caseload Maintenance' dropdown is open, showing three options: 'Caseload Maintenance', 'CBRS Enrollments', and 'Assign Child's Therapist(s) and Service Provider(s)'. The third option is highlighted with a red box and a mouse cursor icon.

- * Search for child, and then click “Select”.
- * This will bring up all of the enrollments for the child.
- * Now “Select” the enrollment.



A screenshot of the 'Select a Child' search results page. It features a search bar with the text 'Name (Last,First) ace, cl' and a 'Search' button. Below the search bar is a table with two rows of child data. A red arrow points to the 'Select' button in the first row.

	Child Number	Last Name	First Name	DOB	CIN	District	County
Select	C14000107823	ACEVEDO	CLAYTON	1/22/2015		Buffalo	ERIE
Select	C14000157818	ACEVEDO	CLAYTON	12/1/2016		Grand Island	ERIE



A screenshot of the 'Select an Enrollment' page. It shows the child's name 'ACEVEDO, CLAYTON' and search criteria: 'County: ERIE', 'District: Grand Island', and 'DOB: 12/1/2016'. Below this is a table with one row of enrollment data. A red arrow points to the 'Select' button in the first row.

Select a Child
ACEVEDO, CLAYTON County: ERIE District: Grand Island DOB: 12/1/2016 Redo Search

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1920W0105028	RS	ST	2x30	5/12/2020	6/30/2020	I	

Assigning Children to Therapist

- * Select a therapist from the Available Therapists section, and click “Add Therapist(s)/Service Provider(s)”. You can have more than one therapist assigned.
- * To remove assigned therapists, select the therapist from the Assigned Therapists section, and click “Remove Therapist”.

Select a Child
LACY, IVORY County: **ERIE** District: **Cheektowaga-Sloan** DOB: **10/1/2019** [Redo Search](#)

Select an Enrollment

Select	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select		CB		0 hrs/day 0 days/week	9/5/2022	6/18/2023	I	
Select	CPSECBRS0000124611	CBRS	PT	2x30	9/5/2022	6/18/2023	I	ALBRIGHT, TONJA
Select	CPSECBRS0000124612	CBRS	OT1	1x30	9/5/2022	6/18/2023	G	
Select	CPSECBRS0000124613	CBRS	ST	4x30	9/5/2022	6/18/2023	I	
Select	CPSECBRS0000124614	CBRS	ST1	1x30	9/5/2022	6/18/2023	G	

Assigned Therapists

	Last Name	First Name	NPI
<input type="checkbox"/>	ASHBY	ZENAIDA	1407018625

[Remove Therapist](#)

Available Therapists

	Last Name	First Name	NPI
<input type="checkbox"/>	ABRAHAM	ALETHA	1316193725
<input type="checkbox"/>	ABRAMS	JACQUELIN	1003208976
<input type="checkbox"/>	ACKERMAN	GENE	1316438575
<input type="checkbox"/>	ADKINS	ABEL	
<input type="checkbox"/>	AHMED	RETA	1639581416
<input type="checkbox"/>	ALBRIGHT	TONJA	1093139891
<input type="checkbox"/>	ALLISON	ADRIAN	1275958043
<input type="checkbox"/>	ANDRADE	ALAN	1720243496
<input type="checkbox"/>	ARIAS	ALEC	1326465626
<input type="checkbox"/>	ARROYO	KACIE	1215201017
<input type="checkbox"/>	AVALOS	KRISTAL	1124200761
<input type="checkbox"/>	AVILA	ALI	1194088799
<input type="checkbox"/>	AVILES	ZULMA	1073060901
<input type="checkbox"/>	BALLARD	ISELA	1538473822
<input type="checkbox"/>	BARON	ERA	

[Add Therapist\(s\)/Service Provider\(s\)](#)



Matching Children

Matching Children

- * Billing **cannot** be submitted to the County on “Unmatched” children/enrollments.
- * Billing can only be submitted for County created enrollments.
- * You will need to match the Unmatched Children and Unmatched Enrollments.
- * You can go to **Caseload Maintenance -> Unmatched Children** and “Attempt Match”.

Unmatched Children

Add Child

Child Number	Last Name	First Name	MI	DOB	Gender	County	District	Address1	City	State	Zip	HomePhone				
C14000241462	LACY	IVORY		10/1/2019	m	ERIE	Cheektowaga-Sloan						Enrollments	Attempt Match	Edit	Delete
C40000198044	PEARCE	BERYL		11/15/2018	F	NIAGARA	NIAGARA FALLS CITY SD						Enrollments	Attempt Match	Edit	Delete
C40000190740	RANGEL	LANDON		2/23/2017	M	NIAGARA	NORTH TONAWANDA CITY SD						Enrollments	Attempt Match	Edit	Delete

- * Or you can “Attempt Child Match” from the **Caseload Maintenance -> View Unmatched Enrollments** screen.

Unmatched Enrollments

School Year All School Years

Retrieve

County	Child Number	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description				
NIAGARA	C40000139209	CROSS	PATSY	10/13/16	202021	07/06/20	08/14/20	CBRS	PNT	1x10 MONTHLY	Attendances			Delete
ERIE	C14000241462	LACY	IVORY	10/01/19	202324	09/01/23	06/30/24	RS	ST	2x30	Attendances	Attempt Child Match		Delete
NIAGARA	C40000161478	LUDWIG	LAUREEN	12/14/16	202021	07/06/20	08/14/20	CBRS	ST1	5x120	Attendances			Delete
NIAGARA	C40000103114	LUTZ	MICA	05/24/15	202021	07/06/20	08/14/20	CBRS	PNT	1x10 MONTHLY	Attendances			Delete

Matching Children

- * The top of the screen will show the unmatched information you entered for the child.
- * The bottom of the screen shows the potential County matches.
- * **Make sure the child you are selecting to match is the correct one** and click “Select”.

Match Child Against County-Imported Child

Current Unmatched Child:

AYSON

Agency information

County: Albany District: ALBANY CITY SD DOB: 11/13/2020

Potential Matches:

County information

Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select		JAYSON		11/13/2020	Albany	ALBANY CITY SD		ALBANY	NY		

Matching Children

- * 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!”

Match Child Against County-Imported Child

Current Unmatched Child:
AYSON County: Albany District: ALBANY CITY SD DOB: 11/13/2020

Potential Matches:
Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select		AYSON		11/13/2020	Albany	ALBANY CITY SD		ALBANY	NY		

Agency information **County information**

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.

AYSON (11/13/2020)

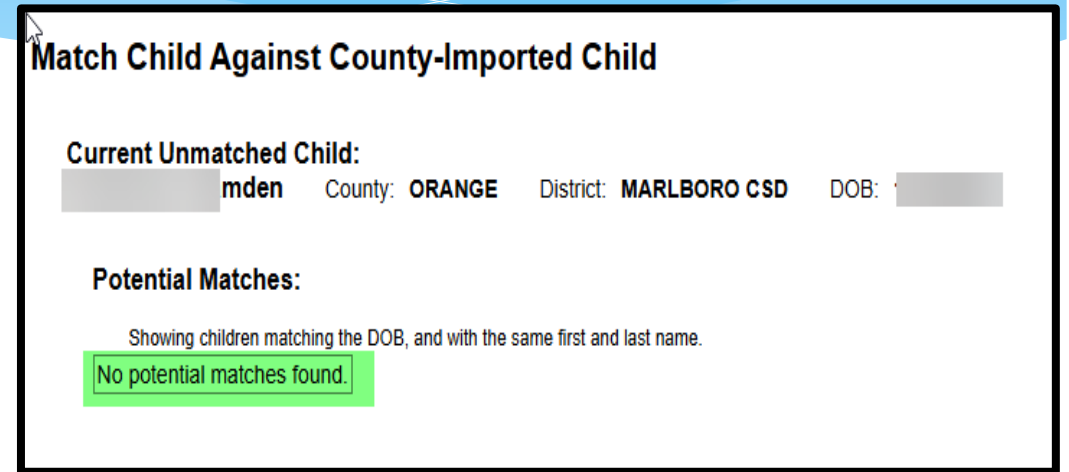
→

AYSON (11/13/2020)

Match!

Matching Children

- * If you click on “Attempt Match”, and receive “No Potential Matches Found”:
 - * Either the County has not sent the child to Portal, or
 - * You have entered wrong information about the child.
 - * For example:
 - * The wrong Date of Birth
 - * The child has a hyphenated name, but the County doesn’t.
 - * The wrong school district.
- * You can go to **Reports -> Enrollments Uploaded County**, filter for County, School Year and Service Type (CB,CBRS,SEIT,RS).
 - * Look for the child in the list. Does the County name match what you entered? Is there a space or a hyphen?
 - * If you still cannot match the child, then contact the Help Desk at Support@CPSEPortal.com, and we can assist you.



Match Child Against County-Imported Child

Current Unmatched Child:
[Redacted]mden County: **ORANGE** District: **MARLBORO CSD** DOB: [Redacted]

Potential Matches:
Showing children matching the DOB, and with the same first and last name.
No potential matches found.



Matching Enrollments

View Unmatched Enrollments

- * Go to **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 enrollment has potential matches (same child and service type), the “Attempt Enrollment Match” link will appear.

Matching Unmatched Enrollments to County Created Enrollments

- * The top of the screen shows the agency created unmatched enrollment.
- * The bottom of the screen shows a list of potential matches based on service type only (doesn't check dates).
- * If you find a County created match, click “Select”.

Match Enrollment Against County-Imported Enrollment

Child:

[Redacted]

County: **SCHENECTADY**

District: **Scotia**

DOB: **4/5/2019**

Current Unmatched Enrollment:

Session: **2022 - 2023 Winter** From Date: **12/13/2022** To Date: **6/22/2023**

Enrollment Type: **CBRS** Service Type: **OT** Individual or Group: **I** Frequency: **2x30**

Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	CBRS	OT	2022 - 2023 Winter	12/13/2022	6/22/2023	I	2x30	[Redacted]

Matching Unmatched Enrollments to County Created Enrollments

- * When you “Select” the enrollment to match, you will be prompted to confirm the information.
- * **Double check** to make sure the information is correct.
- * If it is correct, click “Match!”

Match Enrollment Against County-Imported Enrollment

Child: County: **SCHENECTADY** District: **BURNT HILLS-BALLSTON LAKE CSD** DOB: 11/3/2018

Current Unmatched Enrollment:

Session: **2022 - 2023 Winter** From Date: **1/5/2023** To Date: **6/22/2023**
Enrollment Type: **CBRS** Service Type: **OT** Individual or Group: **I** Frequency: **2x30**

Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	CBRS	OT	2022 - 2023 Winter	1/5/2023	6/22/2023	I	2x30	<input type="text"/>

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
(1/5/2023 - 6/22/2023)
2x30

→ CBRS2223W0025240
(1/5/2023 - 6/22/2023)
2x30

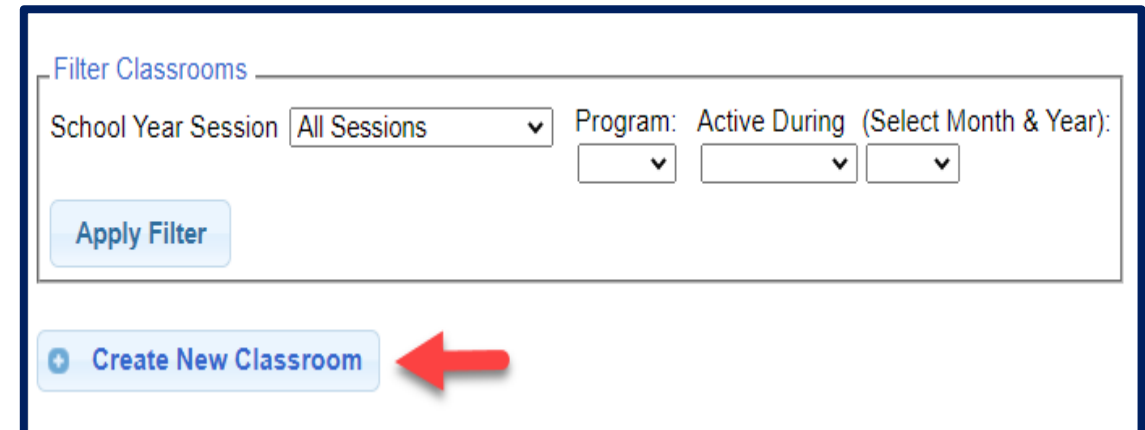
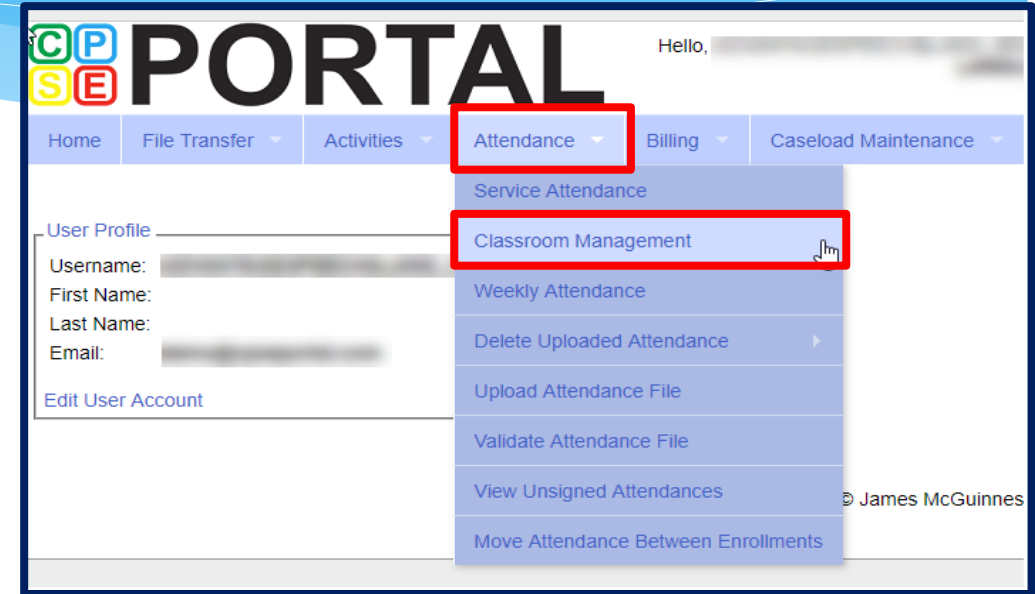
Match!



Classroom Management

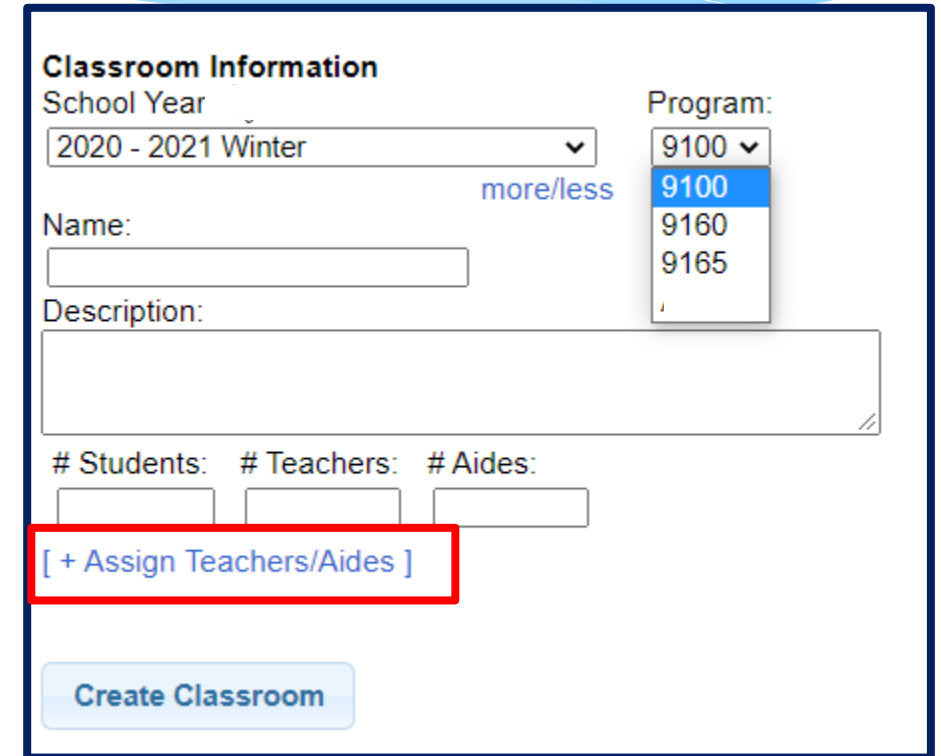
Classroom Management

- * Classrooms are created under "*Classroom Management*".
- * This will allow you to assign teachers/aides to classrooms as well as assign students.
- * Changes may also be made as well as classroom deletions.
- * Go to **Attendance -> Classroom Management**
- * Click on Create New Classroom



Create Classrooms

- * Enter classroom information fields
 - * Select School Year
 - * Select Program
 - * Name your classroom & include hours
 - * I.E.: Room 310 - 2.5 HR PM etc..
 - * Type in description of classroom & include hours
 - * I.E.: Integrated 2.5 HR PM etc..
 - * Enter number of students, number of teachers, and number of aides for this classroom
 - * **Before** you Create the Classroom, you will Assign Teachers/Aides



Classroom Information

School Year: more/less

Program:
 9100
 9160
 9165

Name:

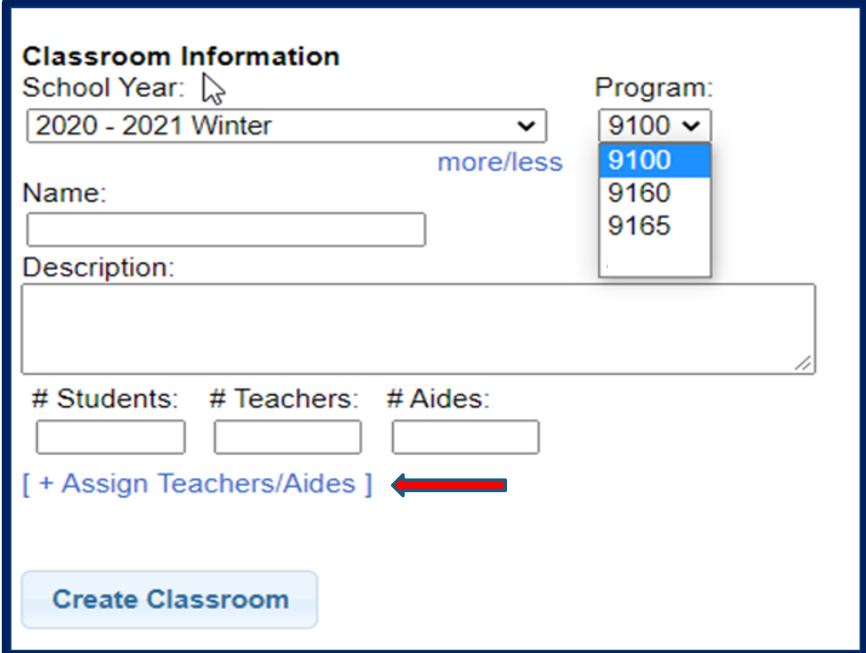
Description:

Students: # Teachers: # Aides:

[\[+ Assign Teachers/Aides \]](#)

Assigning Teacher/Aide To Classrooms

- * Click on (+Assign Teachers/Aides) link
- * If a Billing Admin will be entering classroom attendance, then the Billing Admin must also be assigned to the classroom to sign the classroom attendance.



Classroom Information


School Year: [more/less](#)

Program:

Name:

Description:

Students: # Teachers: # Aides:

[+ Assign Teachers/Aides] 

[Create Classroom](#)

Assigning Teacher/Aide To Classrooms

- * Refer to "Not Assigned" list on right and select name of applicable teacher or aide or "Select All" box;
- * Make sure correct role is selected
- * Click *Assign*
- * Once teacher/aides are assigned to classroom, click on "*Create Classroom*"
- * Should a teacher or aide leave the classroom this is also where you will un-assign them

☐ Only Include in Unassigned List if Discipline Code is TEACH or AIDE? (will reload lists)

Assigned to Classroom

No people currently assigned to classroom.

☐ Select All **Unassign →**

Not Assigned

Select	LastName	FirstName	Role
<input type="checkbox"/>	Teacher ▼
<input checked="" type="checkbox"/>	Teacher ▼
<input checked="" type="checkbox"/>	Aide ▼
<input type="checkbox"/>	Teacher ▼
<input checked="" type="checkbox"/>	Aide ▼
<input type="checkbox"/>	Teacher ▼
<input type="checkbox"/>	Teacher ▼
<input type="checkbox"/>	Teacher ▼

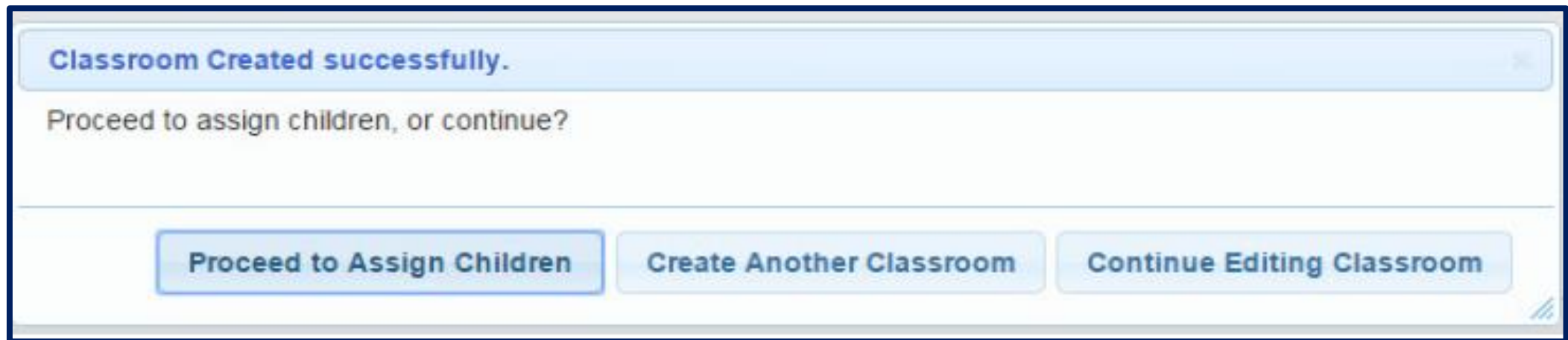
<-- Assign ☐ Select All

Create Classroom

Red arrows indicate: 1. The checkbox for discipline code filtering. 2. The 'Assign' button. 3. The 'Create Classroom' button. 4. The 'Unassign' button.

Assigning Teacher/Aide To Classrooms

- * Now you can select "Proceed to Assign Children", "Create Another Classroom", or "Continue Editing Classroom"



Assigning Children To Classrooms

- * Select box of child to be assigned (in "not assigned" column) or "Select All" if all are to be assigned
- * Click "Assign"
- * To remove a child from the classroom, select box next to child and click "Unassign" or click "Select All" box and click "Unassign"
- * Click "Save Changes"

Classroom: Vicki Kolano

Assigned to Classroom

Select	Last Name	First Name	District	County	DOB	
<input type="checkbox"/>	AMBROSE	FREDRIC	HIGHLAND CSD	ULSTER	4/16/2017	Details
<input type="checkbox"/>	ARNOLD	VIOLA	HIGHLAND CSD	ULSTER	4/11/2017	Details
<input type="checkbox"/>	CASILLAS	BURT	MARLBORO CSD	ULSTER	8/24/2017	Details
<input type="checkbox"/>	DIETZ	LONI	SAUGERTIES CSD	ULSTER	2/1/2018	Details
<input type="checkbox"/>	JOSEPH	HAROLD	KINGSTON CITY SD	ULSTER	2/14/2018	Details
<input type="checkbox"/>	LAY	ABDUL	HIGHLAND CSD	ULSTER	9/29/2017	Details
<input type="checkbox"/>	MEDEIROS	FOREST	HIGHLAND CSD	ULSTER	3/14/2017	Details
<input type="checkbox"/>	SELSTER	MELORE	ONTEORA	ULSTER	4/22/2017	Details

Not Assigned [+ Filter Unassigned Children]

Select	Last Name	First Name	District	County	DOB	
<input checked="" type="checkbox"/>	CRUZ	DAMION	SAUGERTIES CSD	ULSTER	12/26/2015	Details
<input checked="" type="checkbox"/>	DARNELL	KAREEM	SAUGERTIES CSD	ULSTER	1/19/2018	Details
<input type="checkbox"/>	EASON	AUGUSTUS	KINGSTON CITY SD	ULSTER	5/26/2017	Details
<input type="checkbox"/>	FLORES	ED	PINE BUSH CSD	ULSTER	4/16/2016	Details
<input type="checkbox"/>	FLOWERS	MEAGAN	PINE BUSH CSD	ULSTER	4/16/2016	Details
<input type="checkbox"/>	HARDY	GARRY	KINGSTON CITY SD	ULSTER	12/17/2015	Details
<input type="checkbox"/>	LOOMIS	ROMEO	PINE BUSH CSD	SULLIVAN	9/7/2017	Details

☐ Select All

Unassign -->

<-- Assign

☐ Select All

Save Changes

Assigning Children To Classrooms


- * Once you select "Proceed to Assign Children"
- * Select "Details" link to review service details of the child
 - * You can review child info on under the "Child Demographic Info" tab
 - * You can review service info under the "Service Info" tab
- * You can also click on "Sessions for Enrollment Report" link to run an enrollment report.
 - * Enter report criteria with from/to dates and click "Run"
- * When ready to assign child to classroom, click back button to return to Classroom screen



Child Demographic Info Service Info

First Name [REDACTED]
Last Name [REDACTED]
DOB [REDACTED]
Gender F
Address [REDACTED]
County Albany
District COHOES CITY SD

Sessions For Enrollment Report



Select Report Criteria

CB ☐ CBRS ☒ RS ☐ SEIT ☐

From Date: 9/1/2014 To Date: 6/30/2015



Child Demographic Info Service Info

Service ID [REDACTED]
Enrollment Type CB
Provider Name [REDACTED]
Program Code 9165
STAC Code I
From Date 9/3/2014
To Date 10/30/2014
Frequency 2.5 hrs/day

Sessions For Enrollment Report

Assigning Children To Classrooms

- * After saving your changes, you can either go to *Back to Classroom List* or *Continue Assigning Children*.



Classroom List

- * Go to **Attendance -> Classroom Management**, filter the school session, and “Apply Filter”.
- * All additions or updates may be accessed by selecting the following links:
 - * Attendance may be viewed by clicking on "Attendance"
 - * Classroom info, including assigning of teachers/aides, may be updated by clicking "Edit Classroom"
 - * Children may be assigned or unassigned by clicking "Assign Children"
 - * Classrooms may also be deleted by clicking "Delete Classroom"

Filter Classrooms

School Year Session

2021 - 2022 Winter

Program:

Active During

(Select Month & Year):

Apply Filter

Attendance	Class	Description	School Year	Program	# Students	# Teachers	# Aides			
Attendance	(5:1:0)		2021 - 2022 Winter	9160	7	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	8:1:2)		2021 - 2022 Winter	9100	2	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	:2)		2021 - 2022 Winter	9100	7	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	S (2:1:0)		2021 - 2022 Winter	9160	6	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	S (6:1:1)		2021 - 2022 Winter	9160	4	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(8:1:2)		2021 - 2022 Winter	9100	9	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(8:1:2)		2021 - 2022 Winter	9160	0	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	CIS (4:1:0)		2021 - 2022 Winter	9160	3	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(4:1:1)		2021 - 2022 Winter	9160	6	1	0	Edit Classroom	Assign Children	Delete Classroom

Create New Classroom



Creating a School Schedule

<http://support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx?KBSearchID=35487>

Creating a School Schedule

- * Go to **Attendance -> Classroom Schedule Maintenance -> By Schedule**
- * Click drop down on the top Labeled “School Year Session”, and be sure to select the correct school year.
- * The Schedule name must be filled out as well as the start and end dates. Once this is done click the “Add” button.
- * If there are alternative locations with a different schedule those can also be entered on this screen.



A screenshot of the 'By Schedule' interface. At the top, there are two dropdown menus: 'Provider' and 'School Year Session', both highlighted with red boxes. The 'School Year Session' dropdown is currently set to '2021 - 2022 Winter'. Below these are two tabs: 'By Schedule' (active) and 'By Classroom'. The main area contains a table with columns for 'School Year Session', 'Schedule Name', 'Start Date', 'End Date', and several action buttons. The table has three rows: one for 'Winter Break', one for '2021-2022 School Year', and one for a new entry with empty fields and an 'Add' button.

School Year Session	Schedule Name	Start Date	End Date					
2021 - 2022 Winter	Winter Break	12/24/2021	12/31/2021	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	2021-2022 School Year	9/8/2021	6/24/2022	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter				Add				

Adding School Closures

- * School closures can be added ahead of time to designate holidays or planned school closures/snow days.

Provider School Year Session

By Schedule **By Classroom**

School Year Session	Schedule Name	Start Date	End Date					
2021 - 2022 Winter	Winter Break	12/24/2021	12/31/2021	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	2021-2022 School Year	9/8/2021	6/24/2022	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add				

- * Click on “Add Closure”
- * Add the Date of Closure as well as a description and click the “Ok” button.

Add Closure

Schedule: 9/4/19-6/26/20 alt

Date Of Closure:

Description

Editing a Closure Date

- * Click on “Edit Closure Date” to edit the closure already entered or add more closures.

Provider School Year Session

By Schedule **By Classroom**

School Year Session	Schedule Name	Start Date	End Date					
2021 - 2022 Winter	Winter Break	12/24/2021	12/31/2021	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	2021-2022 School Year	9/8/2021	6/24/2022	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add				

Session Name: 9/4/19-6/26/20 alt

School Year Session: 201920 WIN

First Day of Class: 09/04/2019

Last Day of Class: 06/25/2020

Start Date	End Date	Closure Description		
1/13/2020	1/13/2020	MLK Day	Edit	Delete
5/25/2020	5/25/2020	Memorial Day	Edit	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	Add	

Applying Schedule to Classroom's Attendance

- * Once closures are entered they can be applied to the schedule to the classroom's attendance.
- * Click on “*Apply Schedule to Classroom's Attendance*”
- * On the next screen you can chose the closure you want to apply to the schedule. The Schedule Month will allow for the month to be chosen.
- * The closure that is entered for that month will appear press “OK” button.
- * You will then get a successful message.
- * This can be done for every closure that has been entered for the school year.

Provider School Year Session

By Schedule **By Classroom**

School Year Session	Schedule Name	Start Date	End Date					
2021 - 2022 Winter	Winter Break	12/24/2021	12/31/2021	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	2021-2022 School Year	9/8/2021	6/24/2022	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2021 - 2022 Winter	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add				

Apply Closures for Month to Child Attendance Records

Schedule Month:

Start Date	End Date	Description
01/13/20	01/13/20	MLK Day

January Schedule Dates applied successfully.

Provider School Year Session

Adding Closures to Classrooms

- * The process is the same but is done under the *By Classroom Tab*

Provider School Year Session

Classroom Name	Description	School Year Session	Program	Schedule				
Maplewood 9-2 Priscilla	Maplewood 9-2 Priscilla	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 830-130 Marlene	Maplewood 830-130 Marlene/Jessica	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 8-1 Heather	Maplewood 8-1 Heather	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 830-130 Jenna	Maplewood 830-130 Jenna	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 8-1 Katrina	Maplewood 8-1 Katrina	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 9-2 Ruth	Maplewood 9-2 Ruth	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign

Add Closure

Schedule: Classroom: AQ - 1 AM

Date Of Closure:

Adding Closures to Classrooms

- * Click on *Apply Schedule to Classroom Attendance* once closures are added.
- * Once you Apply the Schedule to Classroom's Attendance this creates closure attendances based upon the schedule you just created.
- * These attendances need to be digitally signed, the same way you would previously sign a Provided or Present session.

Provider ACHIEVEMENTS School Year Session 2021 - 2022 Winter

By Schedule

By Classroom

Classroom Name	Description	School Year Session	Program	Schedule				
Maplewood 9-2 Priscilla	Maplewood 9-2 Priscilla	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 830-130 Marlene	Maplewood 830-130 Marlene/Jessica	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 8-1 Heather	Maplewood 8-1 Heather	2021 - 2022 Winter	9100	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 830-130 Jenna	Maplewood 830-130 Jenna	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 8-1 Katrina	Maplewood 8-1 Katrina	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
Maplewood 9-2 Ruth	Maplewood 9-2 Ruth	2021 - 2022 Winter	9160	Not Assigned	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign



Entering Classroom Attendance

Entering Classroom Attendance

- * Go to **Attendance -> Classroom Management** or **Attendance -> Classroom Attendance**
- * Click on attendance to the right of the classroom

Filter Classrooms

School Year Session: 2021 - 2022 Winter Program: Active During (Select Month & Year):

Apply Filter

Attendance	Class	Description	School Year	Program	# Students	# Teachers	# Aides			
Attendance	(5:1:0)		2021 - 2022 Winter	9160	7	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	8:1:2)		2021 - 2022 Winter	9100	2	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	:2)		2021 - 2022 Winter	9100	7	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	S (2:1:0)		2021 - 2022 Winter	9160	6	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	S (6:1:1)		2021 - 2022 Winter	9160	4	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(8:1:2)		2021 - 2022 Winter	9100	9	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(8:1:2)		2021 - 2022 Winter	9160	0	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	CIS (4:1:0)		2021 - 2022 Winter	9160	3	1	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	(4:1:1)		2021 - 2022 Winter	9160	6	1	0	Edit Classroom	Assign Children	Delete Classroom

Create New Classroom

Filter Classrooms

Session: 2023 - 2024 Winter Apply Filter

	Class	Description	School Year	Program	# Students	# Teachers	# Aides
Attendance			2023 - 2024 Winter	9100	2	2	0
Attendance			2023 - 2024 Winter	9160	2	2	0
Attendance			2023 - 2024 Winter	9100	11	2	0
Attendance			2023 - 2024 Winter	9100	1	2	0
Attendance			2023 - 2024 Winter	9160	1	2	0
Attendance			2023 - 2024 Winter	9160	7	2	0
Attendance			2023 - 2024 Winter	9160	1	2	0
Attendance			2023 - 2024 Winter	9160	9	3	0
Attendance			2023 - 2024 Winter	9160	7	2	0
Attendance			2023 - 2024 Winter	9160	2	3	0
Attendance			2023 - 2024 Winter	9160	2	2	0
Attendance			2023 - 2024 Winter	9160	1	2	0

Entering Classroom Attendance

- * If a child is present single click on the day and it will be highlighted in green. Green indicates child was present for that day.
- * If the child was absent double click on the day and it will change to the color Red. Red indicates the child was absent for that day.

Classroom: Leanna DunneUnsaved attendance changes exist.

Current Week
← 06/18/23 - 06/24/23 →

[Print Attendance Sheet](#)

Child	Enrollment	Mon <input checked="" type="checkbox"/>	Tue <input checked="" type="checkbox"/>	Wed <input checked="" type="checkbox"/>	Thu <input checked="" type="checkbox"/>	Fri <input checked="" type="checkbox"/>
		06/19/23	06/20/23	06/21/23	06/22/23	06/23/23
COTTRELL, MELISSA	9/06/22-6/23/23 (CB2223W0009980)					
HATCHER, BRENT	9/06/22-6/23/23 (CB2223W0009975)					
HICKS, TOM	9/06/22-6/23/23 (CB2223W0010140)					
MARSH, DOMINGO	9/06/22-6/23/23 (CB2223W0009949)					
PRICE, ANGLEA	9/06/22-6/23/23 (CB2223W0013619)					
RANGEL, DERRICK	10/29/22-6/23/23 (CB2223W0010186)					
RUBIO, LEOPOLDO	12/12/22-6/23/23 (CB2223W0010210)					
ZAMORA, DENNY	9/06/22-6/23/23 (CB2223W0010150)					
						Total Sessions: 40

[Return to Classrooms](#)→ [Save Attendances](#)

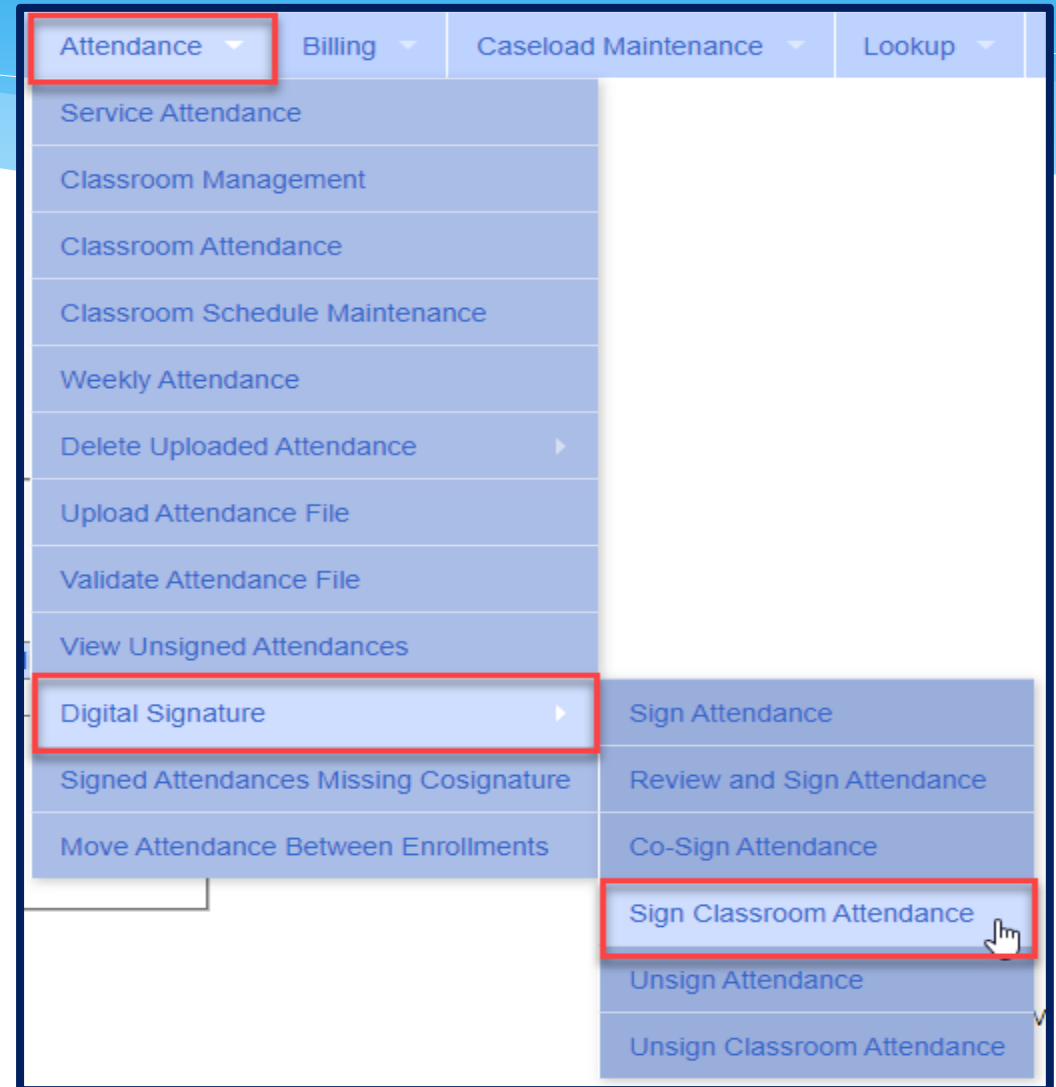
Entering Classroom Attendance

- * The date of 5/25/20 is greyed out since we had previously added it as a Holiday and applied it to the schedule.
- * This will be applied to all the children in the classroom.

Enrollment		Mon <input checked="" type="checkbox"/>
		05/25/20
9/04/19-6/26/20	(CB1920W0107131)	
9/04/19-6/26/20	(CB1920W0105819)	
9/04/19-6/26/20	(CB1920W0104753)	
9/04/19-6/26/20	(CB1920W0105598)	
9/04/19-6/26/20	(CB1920W0105099)	
9/04/19-6/26/20	(CB1920W0105096)	
11/13/19-6/26/20	(CB1920W0107338)	
9/04/19-6/26/20	(CB1920W0106004)	

Signing Classroom Attendance

- * Classroom attendance can be signed by the teacher or an agency administrator.
- * Go to **Attendance -> Digital Signature -> Sign Classroom Attendance**



Signing Classroom Attendance

- * This screen shows the attendance you need to review/edit/sign for.
- * You can filter by a classroom, month, the county and provider.
- * Once you have selected your filter, hit “Retrieve”.

Classroom: Month: County: Provider:

<input type="checkbox"/>	Child Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
<input type="checkbox"/>	EASON, ULYSSES	█	█	█			█	█	█	█	█			█	█	█	█	█			█	█	█	█	█		█	█				
<input type="checkbox"/>	HAGAN, MARCO	█	█	█			█	█	█	█	█			█	█	█	█	█			█	█	█	█	█		█	█				
<input type="checkbox"/>	HEWITT, RONNIE	█	█	█			█	█	█	█	█			█	█	█	█	█									█	█				
<input type="checkbox"/>	JOSEPH, HAROLD	█	█	█			█	█	█	█	█			█	█	█	█	█			█	█	█	█	█		█	█				
<input type="checkbox"/>	RUSHING, ORVILLE	█	█	█			█	█	█	█	█			█	█	█	█	█			█	█	█	█	█		█	█				

Signing Classroom Attendance

- * Teachers can delete attendances but you cannot add them on this screen before your sign your attendances.
- * First, select the attendances you wish to sign for by clicking the box next to each name.
- * Once you have reviewed/edited your attendance, click on “Sign Attendance”
- * Read the agreement, enter your pin and click “I agree.”

Classroom: Month: County: Provider:

<input type="checkbox"/>	Child Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
<input type="checkbox"/>	EASON, ULYSSES	Green	Green	Green			Green	Green	Green	Green	Green			Green	Red	Green	Green	Red			Grey	Grey	Grey	Grey	Grey			Green	Red			
<input type="checkbox"/>	HAGAN, MARCO	Green	Green	Green			Red	Red	Red	Green	Green			Green	Red	Green	Green	Green			Grey	Grey	Grey	Grey	Grey			Green	Green			
<input type="checkbox"/>	HEWITT, RONNIE	Green	Red	Green			Green	Green	Green	Green	Green			Green	Green	Green	Green	Red									Green	Green				
<input type="checkbox"/>	JOSEPH, HAROLD	Green	Green	Green			Green	Green	Green	Green	Green			Green	Green	Green	Green	Green			Grey	Grey	Grey	Grey	Grey			Green	Green			
<input type="checkbox"/>	RUSHING, ORVILLE	Green	Green	Red			Red	Green	Green	Red	Green			Green	Green	Green	Green	Green			Grey	Grey	Grey	Grey	Grey			Red	Green			



Reports

Enrollment and ESID # (Electronic Service ID Number)

- * 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 #..

How to Find an ESID

* Go to **Lookup -> Child Lookup**, search child's name or child # or STAC ID #, and then click “*Details*”.

* You can also give us the child #.

Child Lookup

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

School Year County Provider District

Child Number STAC ID Electronic Service ID

Child Number	Last Name	First Name	DOB	CIN	District	County	MatchStatus	
C14000107823	ACEVEDO	CLAYTON	1/22/2015		Buffalo	ERIE	County Record	Details
C14000157818	ACEVEDO	CLAYTON	12/1/2016		Grand Island	ERIE	County Record	Details

Child Details (ACEVEDO, CLAYTON)

Child Number: C14000157818 CIN: STAC ID: I84516

DOB: 12/1/2016 Gender: M

Address: County: ERIE
District: Grand Island
Matched?: Y

, NY

[Enrollments](#) [Written Orders](#) [Documents](#)

View Information for School Year:

Status	School Year	From	To	ESID	Provider	Enrollment	CB Program	CB Type	Aide Frequency	Service	Frequency	Individual Or Group	Service Setting	
	2019 - 2020 Winter	5/12/2020	6/30/2020	RS1920W0105028	BUFFALO HEARING & SPEECH CENTER, INC	RS				ST	2x30	I		Attendances Details

Strikethrough = The county deleted this enrollment.

Enrollment Lookup Report

- * A report of all enrollments.
- * Go to **Lookup -> Enrollment Lookup**
- * You can also find the ESID # for each child on this report.

School Year Session

2019 - 2020 Winter

County

ERIE

Provider

BUFFALO HEARING & SPEECH CENTER, INC

☒CBRS

☒RS

☒SEIT

☒CB

Search

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	CB Rate Type	RS Type	Start	End	Frequency	Indiv / Grp	Service Setting	Program	CB Classroom	Aide/Nurse	Aide Frequency	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	CB1920W0045034	ACEVEDO	CLAYTON	1/22/2015	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Buffalo	CB			9/3/2019	6/24/2020	5 hrs/day			9100-I		N		35152.00	556.10	40	43		Attendances
	RS1920W0105028	ACEVEDO	CLAYTON	12/1/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Grand Island	RS		ST	5/12/2020	6/30/2020	2x30	I		9200-2				55.00	12.00	7	8	16	Attendances
	RS1920W0103951	ADAIR	QUINN	9/29/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Tonawanda City	RS		ST	1/2/2020	6/30/2020	2x30	I		9200-2				55.00	14.00	24	27	52	Attendances
	RS1920W0103952	ADAIR	QUINN	9/29/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Tonawanda City	RS		COR	1/2/2020	6/30/2020	1x30 MONTHLY	I		9200-2				55.00		24	27	6	Attendances
	CB1920W0046905	ADKINS	IRVING	12/31/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Frontier	CB			4/8/2020	6/24/2020	5 hrs/day			9100-I		N		10545.60	56.00	12	12		Attendances
	CBRS1920W0015129	ADKINS	IRVING	12/31/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Frontier	CBRS		ST	4/8/2020	6/24/2020	3x30	I		9100-I				0.00	6.00	12	12		Attendances

Excel

- * Use this report 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 (missing rates)
 - * Report can be exported to Excel

Enrollments

School Year Session 2019 - 2020 Winter County ERIE Provider BUFFALO HEARING & SPEECH CENTER, INC

☒ CBRS
☒ RS
☒ SEIT
☒ CB

[Search](#)

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	CB Rate Type	RS Type	Start	End	Frequency	Indiv / Grp	Service Setting	Program	CB Classroom	Aide/Nurse	Aide Frequency	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	CB1920W0045034	ACEVEDO	CLAYTON	1/22/2015	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Buffalo	CB			9/3/2019	6/24/2020	5 hrs/day			9100-I		N		35152.00	556.10	40	43		Attendances
	RS1920W0105028	ACEVEDO	CLAYTON	12/1/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Grand Island	RS		ST	5/12/2020	6/30/2020	2x30	I		9200-2				55.00	12.00	7	8	16	Attendances
	RS1920W0103951	ADAIR	QUINN	9/29/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Tonawanda City	RS		ST	1/2/2020	6/30/2020	2x30	I		9200-2				55.00	14.00	24	27	52	Attendances
	RS1920W0103952	ADAIR	QUINN	9/29/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Tonawanda City	RS		COR	1/2/2020	6/30/2020	1x30 MONTHLY	I		9200-2				55.00		24	27	6	Attendances
	CB1920W0046905	ADKINS	IRVING	12/31/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Frontier	CB			4/8/2020	6/24/2020	5 hrs/day			9100-I		N		10545.60	56.00	12	12		Attendances
	CBRS1920W0015129	ADKINS	IRVING	12/31/2016	ERIE	BUFFALO HEARING & SPEECH CENTER, INC	Frontier	CBRS		ST	4/8/2020	6/24/2020	3x30	I		9100-I				0.00	6.00	12	12		Attendances

[Excel](#)

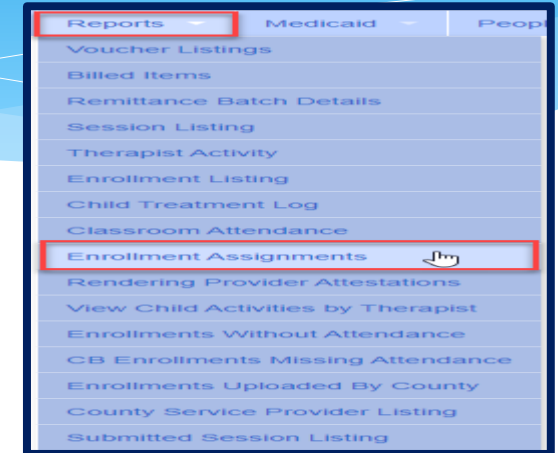
Enrollments Added by County Report

- * Go to **Reports -> Enrollments Uploaded By County**
- * Report will give you a listing of enrollments that the county has added to the Portal.
- * You can filter by dates added after/before, by school year session or type of enrollment.

County:	ERIE	Provider:	BUFFALO HEARING & SPEECH CENTER, INC	School Year Session:	2019 - 2020 Winter	<input checked="" type="checkbox"/> CB	<input checked="" type="checkbox"/> CBRS	<input checked="" type="checkbox"/> SEIT	<input checked="" type="checkbox"/> RS			
Added After:		Added Before:		Retrieve								
County	Provider	Child	School Year	From Date	To Date	Enrollment Type	Service Type	ESID	Frequency	Date Added	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ACEVEDO, CLAYTON	201920 WIN	9/3/2019	6/24/2020	CB		CB1920W0045034	5 hrs/day	8/22/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ACEVEDO, CLAYTON	201920 WIN	5/12/2020	6/30/2020	RS	ST	RS1920W0105028	2x30	6/3/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ADAIR, QUINN	201920 WIN	1/2/2020	6/30/2020	RS	ST	RS1920W0103951	2x30	1/24/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ADAIR, QUINN	201920 WIN	1/2/2020	6/30/2020	RS	COR	RS1920W0103952	1x30 MONTHLY	1/24/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ADKINS, IRVING	201920 WIN	4/8/2020	6/24/2020	CB		CB1920W0046905	5 hrs/day	9/15/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ADKINS, IRVING	201920 WIN	4/8/2020	6/24/2020	CBRS	ST	CBRS1920W0015129	3x30	9/15/2020	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	AGUIRRE, ADAM	201920 WIN	9/1/2019	5/13/2020	RS	ST	RS1920W0101769	2x30	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	AGUIRRE, ADAM	201920 WIN	9/1/2019	6/30/2020	RS	PT	RS1920W0101770	1x30	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	AGUIRRE, ADAM	201920 WIN	9/1/2019	5/13/2020	RS	COR	RS1920W0101771	1x30 MONTHLY	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	AHMAD, NORMAN	201920 WIN	9/3/2019	6/24/2020	CB		CB1920W0045049	5 hrs/day	8/23/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ALEXANDER, ADAN	201920 WIN	9/1/2019	6/30/2020	RS	OT	RS1920W0101776	2x30	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ALEXANDER, ADAN	201920 WIN	9/1/2019	6/30/2020	RS	PT	RS1920W0101777	1x30	9/5/2019	Attendance	View
ERIE	BUFFALO HEARING & SPEECH CENTER, INC	ALEXANDER, ADAN	201920 WIN	9/1/2019	6/30/2020	SEIT		SE1920W0012808	1x30	9/5/2019	Attendance	View
Export to Excel												

Enrollment Assignments Report

- * Go to **Reports -> Enrollment Assignments**.
- * You can search by school year or Provider.
- * Easy way to access child enrollment information.
- * You can also assign or remove therapists from assignments by clicking “**Edit Assignment**”. This will bring you to the *Assign Child’s Therapist(s) and Service Provider(s)* screen.



Enrollment Assignments													
Filters													
School Year: 2019 - 2020 Winter		Provider: BUFFALO HEARING & SPEECH CENTER, INC		<input checked="" type="checkbox"/> Missing Assignments Only		Retrieve							
Last Name	First Name	Electronic Service ID	Related Service Code	Provider	County	District	From Date	To Date	Frequency	Individual Or Group	Therapist Last Name	Therapist First Name	
ADAIR	QUINN	RS1920W0103952	COR	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Tonawanda City	01/02/2020	06/30/2020	1x30 MONTHLY	I			Edit Assignment
ADKINS	IRVING	CBRS1920W0015129	ST	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Frontier	04/08/2020	06/24/2020	3x30	I			Edit Assignment
ALVARADO	AGUSTIN	RS1920W0108855	COR	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Ken/Ton	04/29/2020	06/30/2020	1x30 MONTHLY	I			Edit Assignment
ALVARADO	AGUSTIN	RS1920W0108854	ST	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Ken/Ton	04/29/2020	06/30/2020	2x30	I			Edit Assignment
AQUINO	REED	CBRS1920W0011994	PT	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Ken/Ton	04/08/2020	06/24/2020	2x30	I			Edit Assignment
AVALOS	LANCE	SE1920W0014359		BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Lancaster	06/09/2020	06/30/2020	4x30	I			Edit Assignment
BENEDICT	JULISSA	RS1920W0104810	ST	BUFFALO HEARING & SPEECH CENTER, INC	ERIE	Gowanda	04/22/2020	06/30/2020	1x30	I			Edit Assignment
BERMUDEZ	LEOLA	CBRS1920W0014830	ST	BUFFALO HEARING & SPEECH CENTER, INC	NIAGARA	LOCKPORT CITY SD	03/16/2020	06/24/2020	2x30	I			Edit Assignment
BERMUDEZ	LEOLA	CBRS1920W0014831	OT	BUFFALO HEARING & SPEECH CENTER, INC	NIAGARA	LOCKPORT CITY SD	03/16/2020	06/24/2020	2x30	I			Edit Assignment



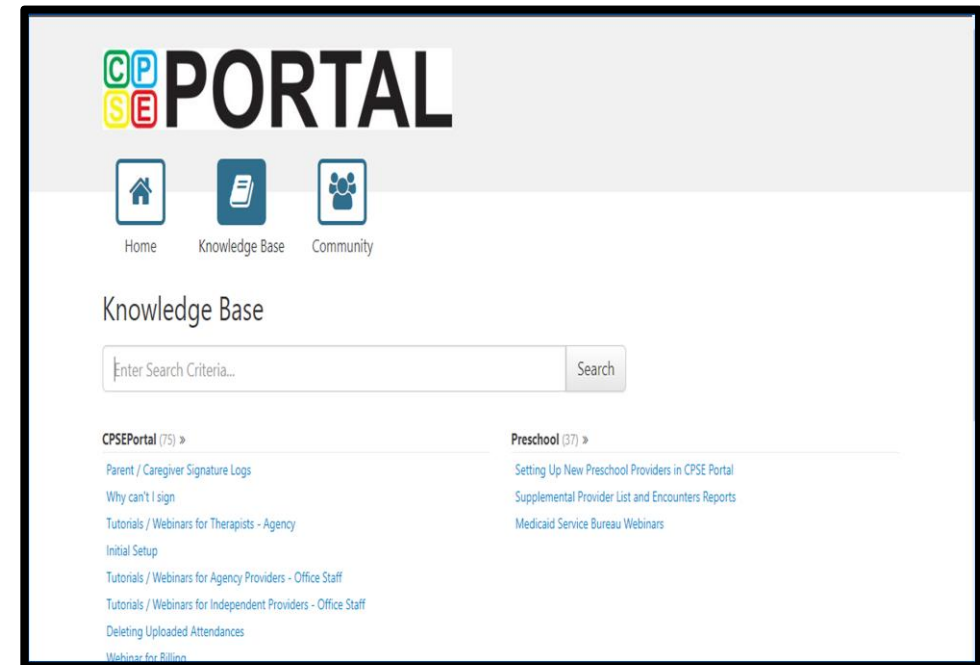
Closing

Important Reminder

- * You **cannot** bill on Unmatched Enrollments.
- * Therefore, you should be matching your children, and unmatched enrollments throughout the week.

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

- * All articles on Unmatched Children and Unmatched Enrollments:
 - * <http://support.cpseportal.com/kb/c11/enrollments.aspx>
- * Entering Unmatched CBRS Enrollments:
 - * <http://support.cpseportal.com/kb/a254/entering-unmatched-cbrs-enrollments.aspx?KBSearchID=16570>
- * Assigning Children to Therapist:
 - * <http://support.cpseportal.com/kb/a34/assign-children-to-therapist.aspx?KBSearchID=19809>
- * Classroom Management
 - * <http://http://support.cpseportal.com/kb/a42/classroom-management.aspx>

Knowledge Base Links

- * Creating a School Schedule

- * <http://support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx?KBSearchID=16564>

- * Entering Classroom Attendance

- * <http://support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=16571>

- * How to Look Up a Child by ESID #:

- * <http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid-.aspx?KBSearchID=19810>

- * Enrollments Added by County Report:

- * <http://support.cpseportal.com/kb/a182/enrollments-added-by-county-report.aspx?KBSearchID=19788>

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 ESID #, Child # or STAC ID #
 - * Include your county, and info needed