JAMES McGUINNESS & ASSOCIATES INC. Consultants

CPSE Portal
Center Based (CB)
Agency Case Management

Tabs Covered In Webinar

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

CPSE PORTAL

JAMES McGUINNESS & ASSOCIATES INC. Consultants

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

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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.
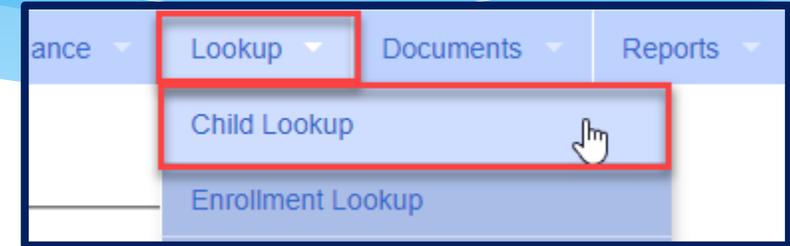
Child Lookup
Last Name: sch   [Search]   [Show Advanced Search options]

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 #

Child Lookup

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

Child Lookup

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

School Year [____▾] County [____▾] Provider [____▾] District [____▾]

Child Number [_____] STAC ID [_____] Electronic Service ID [_____] Medicaid CIN [_____]

[Add Unmatched Child]

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*".
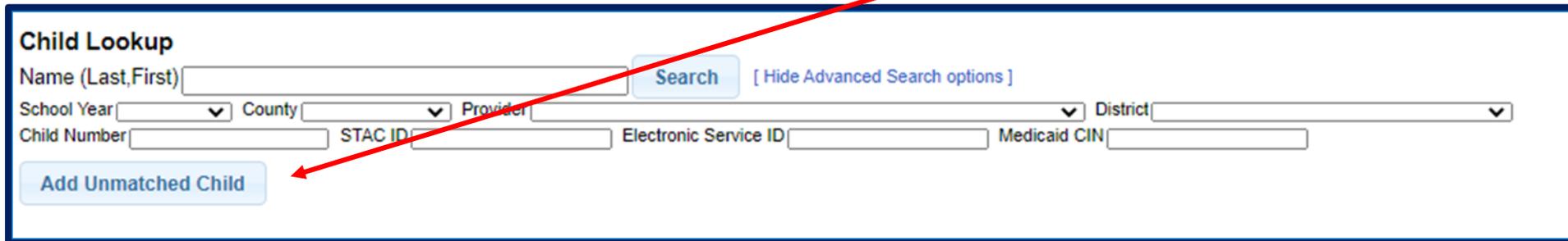
Child Lookup

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

School Year [▼] County [▼] Provider [▼] District [▼]

Child Number [   ] STAC ID [   ] Electronic Service ID [   ] Medicaid CIN [   ]

[Add Unmatched Child]

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 New York ⌄ 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	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

* 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	Cancel
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

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.

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| Caseload Maintenance ▾ | Lookup ▾ | Docum |

CBRS Enrollments

Assign Child's Therapist(s) and Service Provider(s)

Unmatched Children ⬅

Add / Edit Unmatched Enrollments ⬅

View Unmatched Enrollments

County Rescinded Enrollments

Rescinded CB Enrollments w/ CBRS

Caseload

Upload Prescription Details

Enrollments Missing First CoVisit

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 Enrollment Type	OT/PT/ST RS Type	I or G	Frequency/Duration 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
BUFFALO HEARING & SPEECH CENTER, INC ✓	✓			✓	✓	✓			Weekly ✓	Add			

CB
RS
SEIT

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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) **Type Name>SEARCH** [Search] [Show Advanced Search options]

Unmatched Enrollments

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

				CB/SEIT/RS	OT/PT/ST		Frequency/Duration						
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
BUFFALO HEARING & SPEECH CENTER, INC ⌄	⌄			⌄	⌄	⌄			Weekly ⌄	Add			
				CB RS SEIT									

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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.

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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.

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.

Caseload Maintenance	▼	Lookup	▼
CBRS Enrollments			

CB Enrollments

| Session | 2022 - 2023 Winter ▼ | Provider | BUFFALO HEARING & SPEECH CENTER, INC ▼ | County | ERIE ▼ | Last Name | Lacy | First Name | Ivory | DOB | | Search | Clear |

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
	9/5/2022	6/18/2023	[▼]	[▼]	[ ]	[ ]	WEEKLY ▼	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 [ ] [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

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
CPSECBRS0000124612	9/5/2022	6/18/2023	OT1	G	1.00	30	WEEKLY	Edit	Delete
CPSECBRS0000124613	9/5/2022	6/18/2023	ST	I	4.00	30	WEEKLY	Edit	Delete
CPSECBRS0000124614	9/5/2022	6/18/2023	ST1	G	1.00	30	WEEKLY	Edit	Delete
	9/5/2022	6/18/2023	[▼]	[▼]			WEEKLY ▼	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.

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.

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

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

* Search for child, and then click "*Select*".
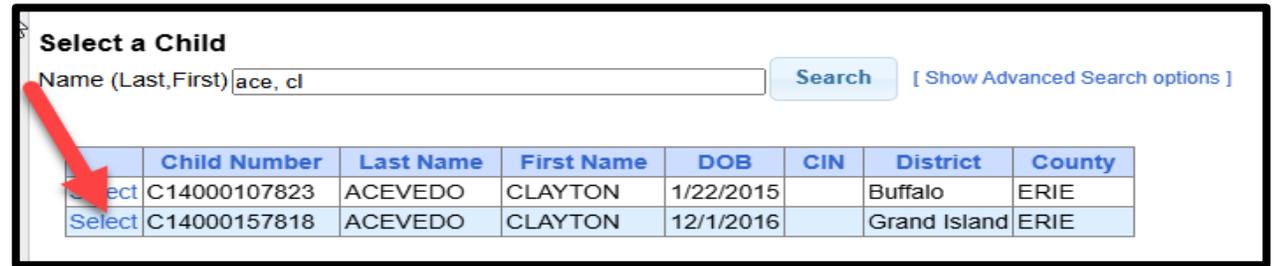
* This will bring up all of the enrollments for the child.

* Now "*Select*" the enrollment.

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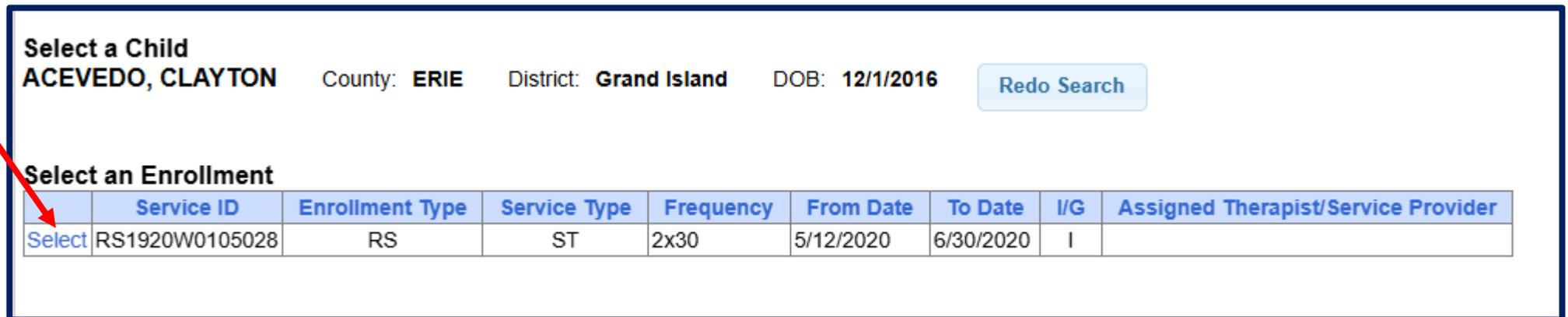
Assigning Children to Therapist

* 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*".

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*".

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.
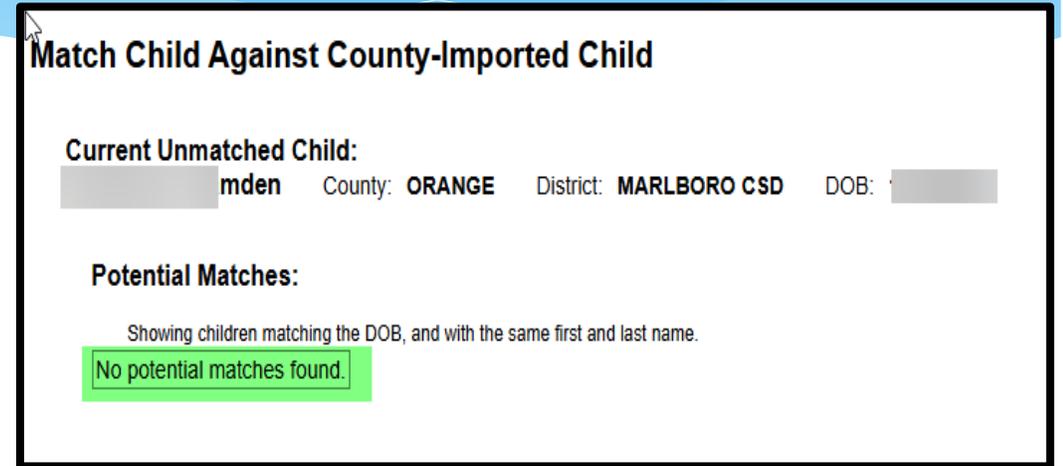
Match Child Against County-Imported Child

Current Unmatched Child:

    mden   County: **ORANGE**   District: **MARLBORO CSD**   DOB:

Potential Matches:

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

No potential matches found.

* 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.

Matching Enrollments

View Unmatched Enrollments

* Go to *Caseload Maintenance –> View Unmatched Enrollments.*

* 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:
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	

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!*"

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

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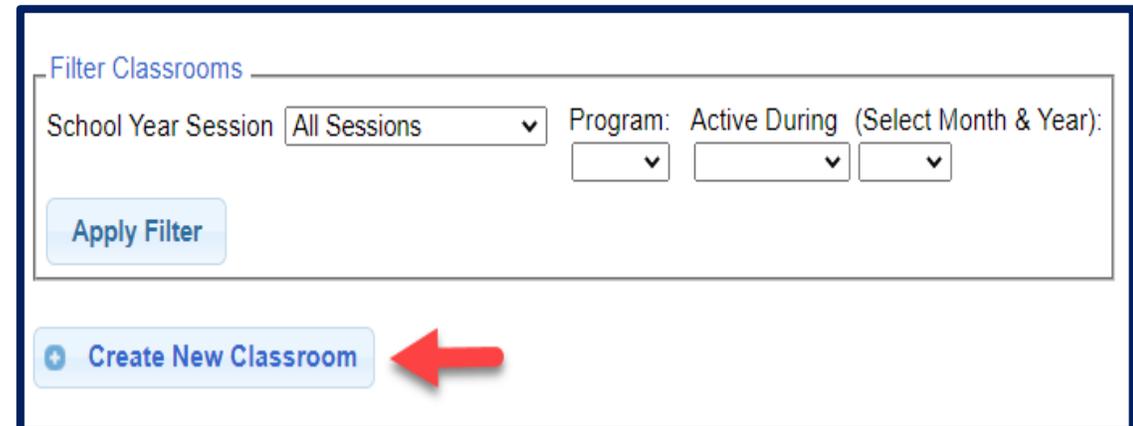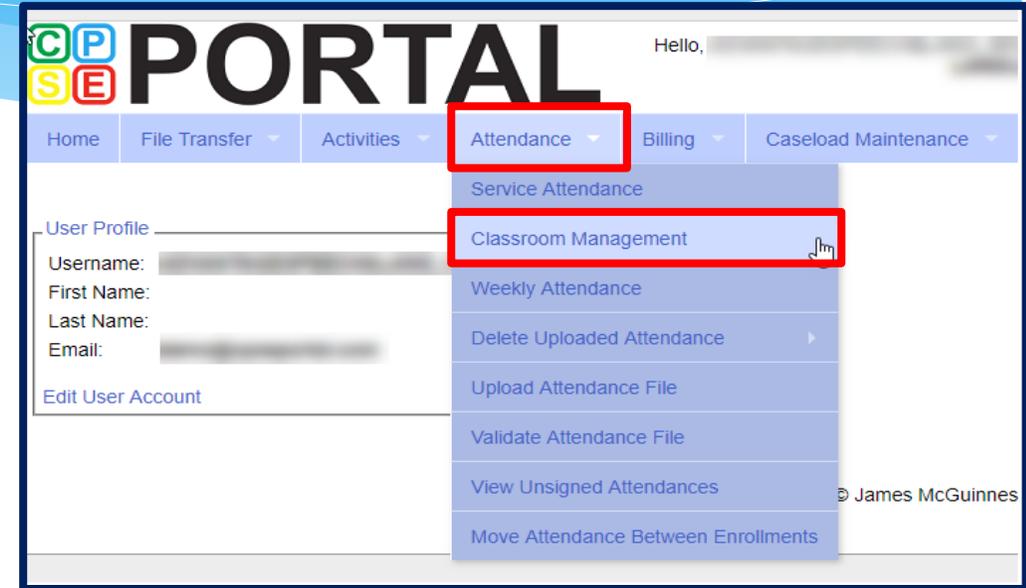
Create Classrooms

* 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   Program:

2020 - 2021 Winter   9100

more/less   9100
                                                        9160
Name: 9165

Description:

Students: # Teachers: # Aides:

[+ Assign Teachers/Aides]

Create Classroom

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:
[2020 - 2021 Winter ▼]
more/less

Program:
[9100 ▼]
9100
9160
9165

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

Assigning Teacher/Aide To Classrooms

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

Classroom Created successfully.

Proceed to assign children, or continue?

| Proceed to Assign Children | Create Another Classroom | Continue Editing Classroom |
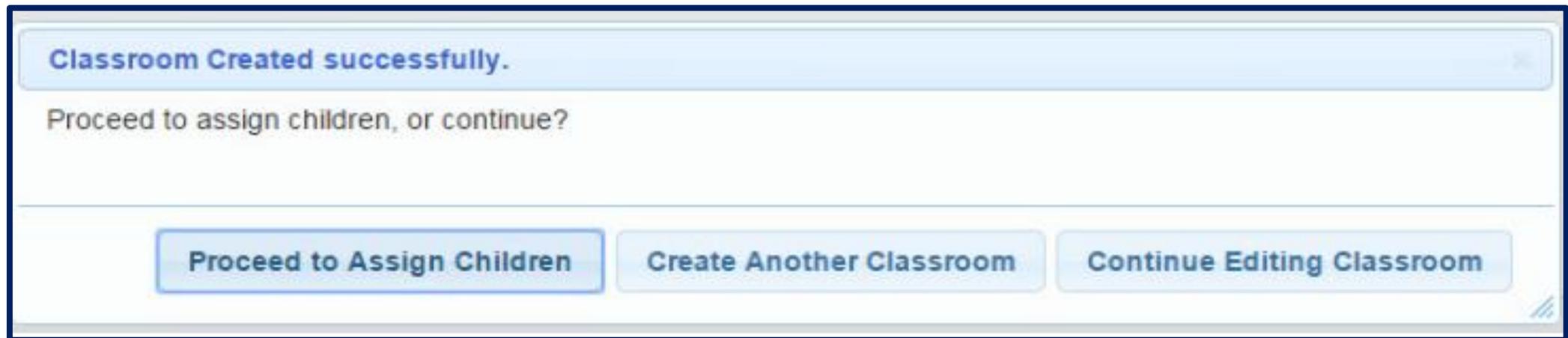
Assigning Children To Classrooms

* 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*"

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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

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Child Demographic Info	Service Info

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

Sessions For Enrollment Report

Child Demographic Info	Service Info

Service ID	
Enrollment Type	CB
Provider Name	
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
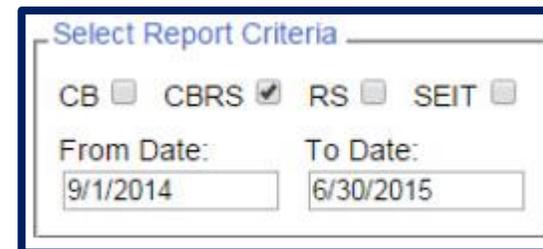
Select Report Criteria

CB ☐ CBRS ☑ RS ☐ SEIT ☐

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

Assigning Children To Classrooms

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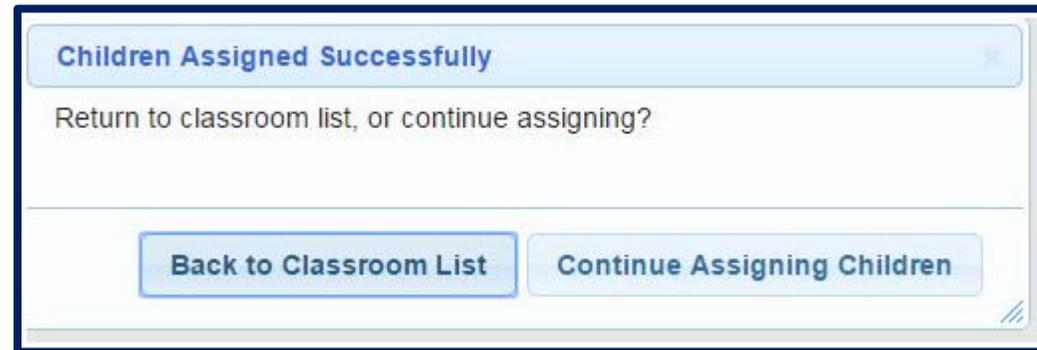
Classroom List

* 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	IS (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.

Attendance ▾	Billing ▾	Caseload M
Service Attendance		
Classroom Management		
Classroom Schedule Maintenance		
Weekly Attendance		
Delete Uploaded Attendance	▸	

Provider [_____]   School Year Session [2021 - 2022 Winter ▾]

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	[____]	[____]	[____]	Add				

Adding School Closures

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

* Click on "*Add Closure*"

* Add the Date of Closure as well as a description and click the "Ok" button.

Editing a Closure Date

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

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.

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Adding Closures to Classrooms

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

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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.

Entering Classroom Attendance

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Entering Classroom Attendance

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

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 Dunne   Unsaved attendance changes exist.

Current Week 📅

| | <-- | 06/18/23 | - | 06/24/23 | --> | |

Print Attendance Sheet

Child	Enrollment	Mon ☑	Tue ☑	Wed ☑	Thu ☑	Fri ☑
		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 ☑
		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*

Attendance ▾	Billing ▾	Caseload Maintenance ▾	Lookup ▾

Service Attendance

Classroom Management

Classroom Attendance

Classroom Schedule Maintenance

Weekly Attendance

Delete Uploaded Attendance ▸

Upload Attendance File

Validate Attendance File

View Unsigned Attendances

Digital Signature ▸   Sign Attendance

Signed Attendances Missing Cosignature   Review and Sign Attendance

Move Attendance Between Enrollments   Co-Sign Attendance

Sign Classroom Attendance

Unsign Attendance

Unsign 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*".

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.*"

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 #..

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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 #.

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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.

Enrollment Lookup Report

* 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 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.

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.

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*
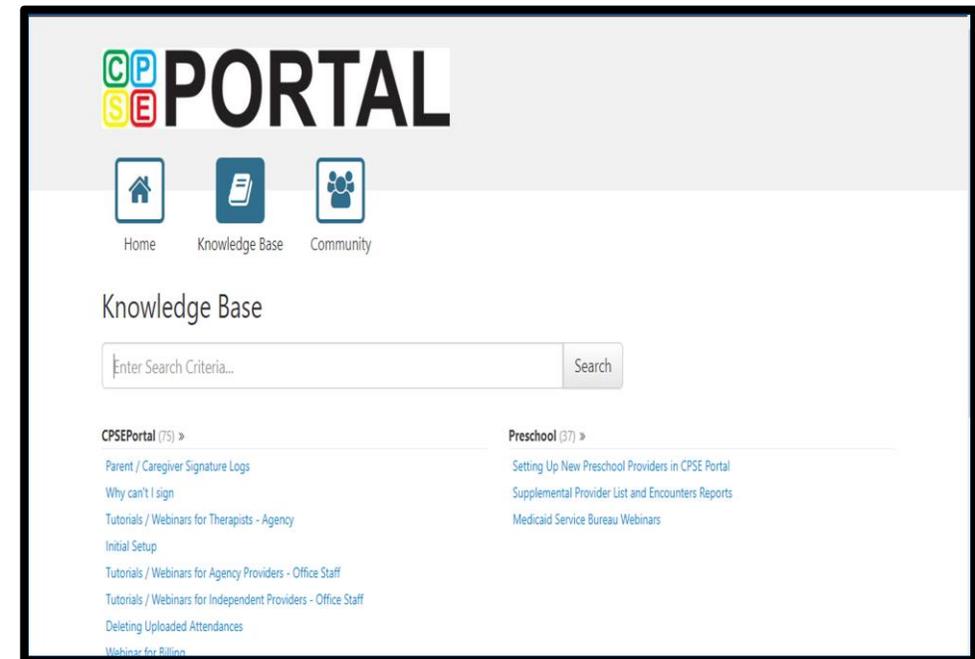
Knowledge Base Links

* 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

Support@CPSEPortal.com