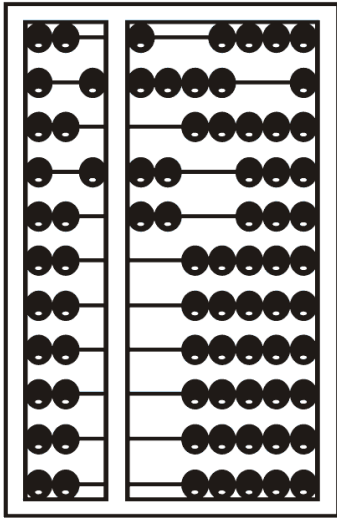


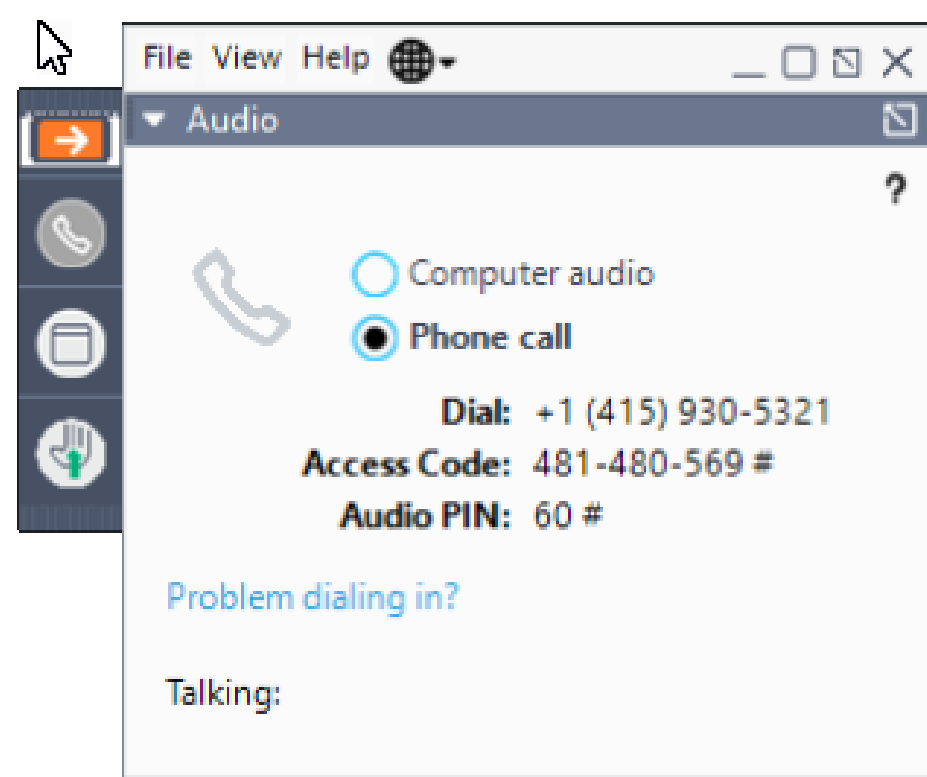
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Using Go To Webinar

Go To Webinar Control Panel

- * Control panel is on far right of screen
- * Orange button with white arrow expands and shrinks control panel

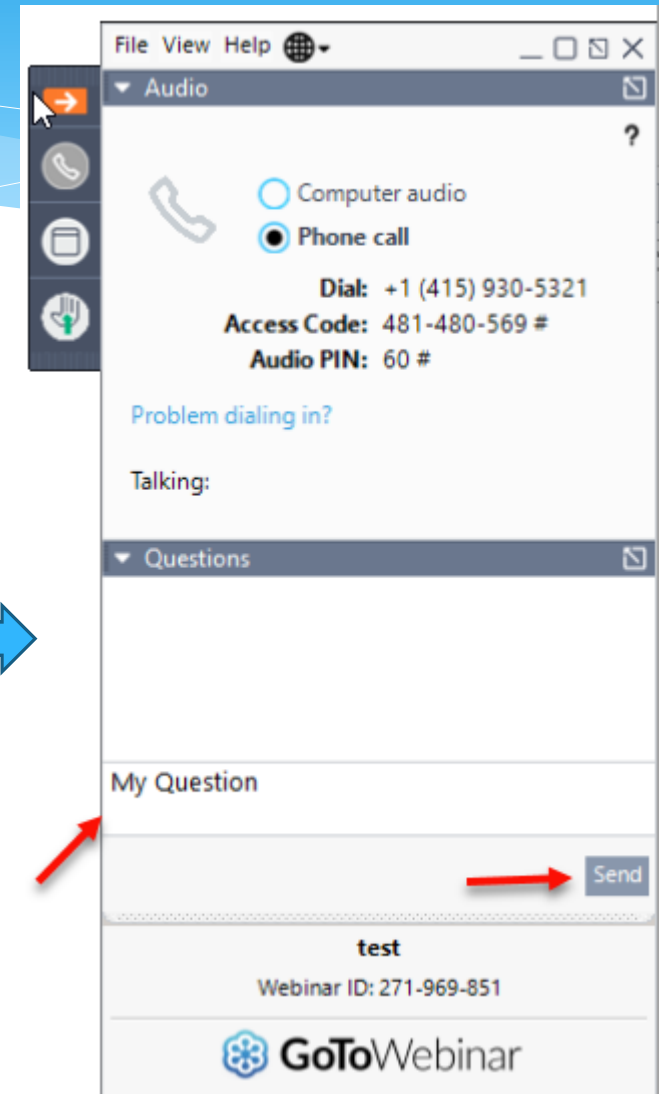
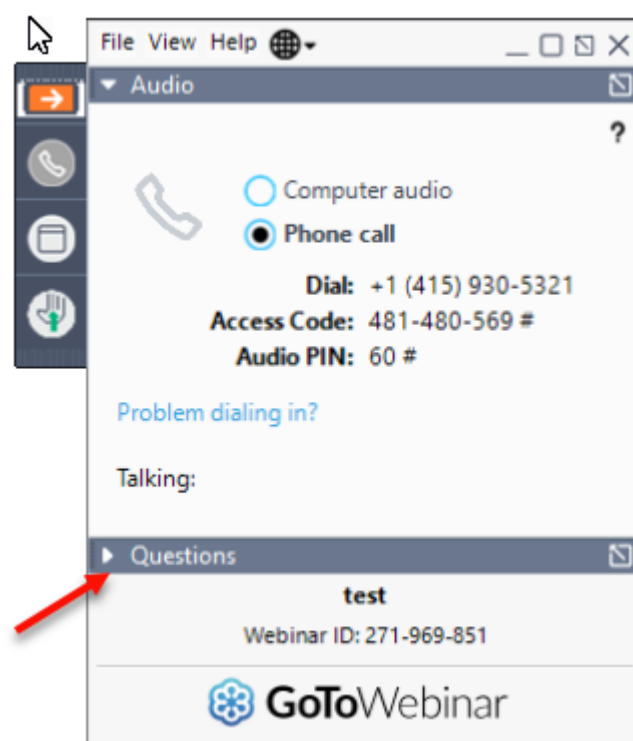


Communicating with Presenter

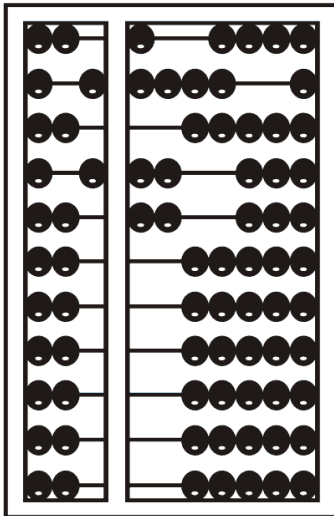
- * All participants are on mute
- * You can type in question in the question box
- * We will answer your question, and also stop at some point to review the questions and answers for everyone.

Typing in a Question

- * Click the question bar to expand questions section
- * Type in your question and click send



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Center Based Set Up & Attendance for CB Agencies

Topics Covered

* **Classroom Management**

- * Create Classrooms (including 1:1 Aide Classrooms)
- * Assigning Teacher/Aide to Classrooms
- * Assigning Children to Classrooms
- * Classroom List

* **Creating a Schedule for the School**

- * Adding and Editing School Closures
- * Applying Schedule to Classrooms Attendance

* **Unmatched Children and Enrollments**

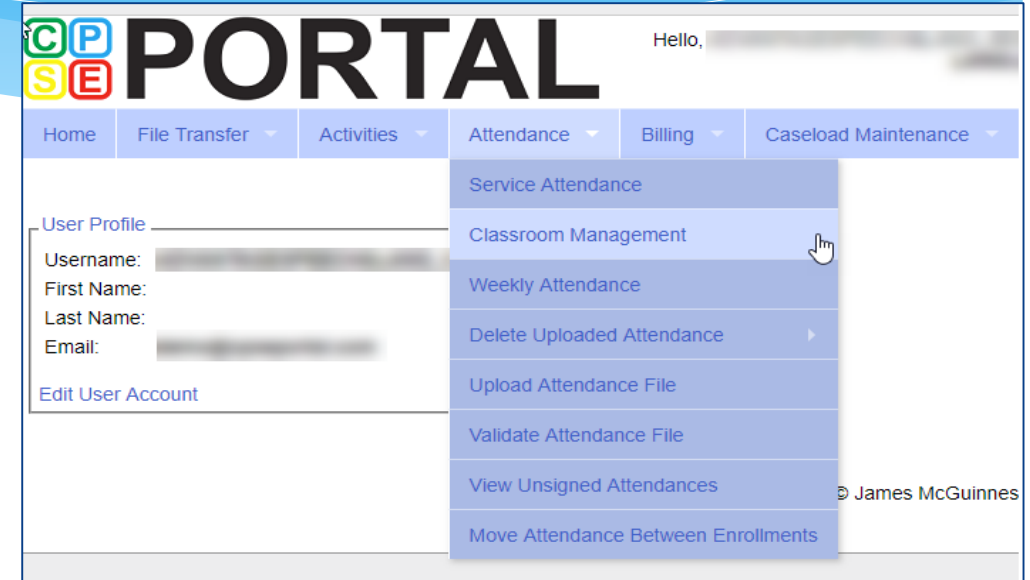
- * Child Lookup
- * Adding and Editing Unmatched Children/Enrollments
- * Entering Unmatched CBRS Enrollments
- * Matching Children and Enrollments

* **Entering and Signing Classroom Attendance**

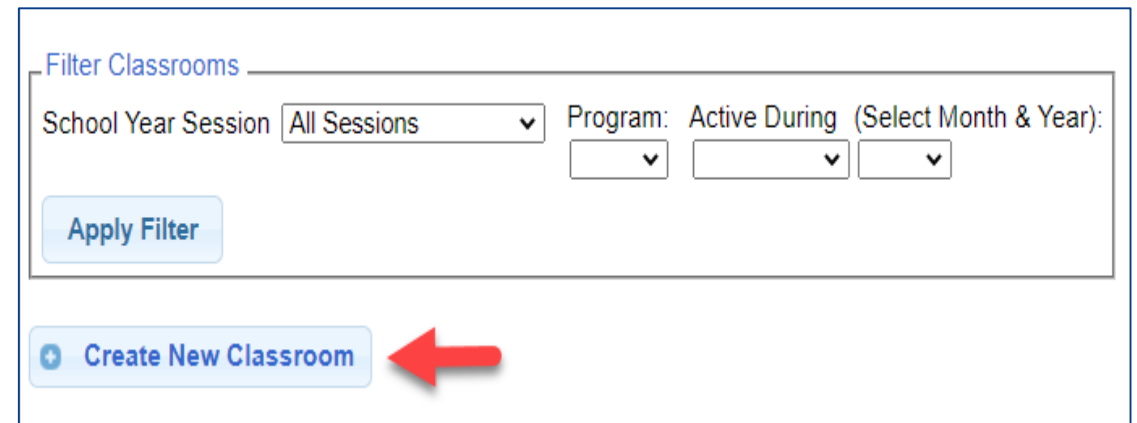
* **CB Enrollments Missing Attendance**

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



The screenshot shows the CPSE PORTAL interface. At the top, the logo 'CPSE PORTAL' is displayed. Below the logo is a navigation bar with tabs: Home, File Transfer, Activities, Attendance, Billing, and Caseload Maintenance. The 'Attendance' tab is selected, and a dropdown menu is open, showing options: Service Attendance, Classroom Management (highlighted with a mouse cursor), Weekly Attendance, Delete Uploaded Attendance, Upload Attendance File, Validate Attendance File, View Unsigned Attendances, and Move Attendance Between Enrollments. On the left side of the page, there is a 'User Profile' section with fields for Username, First Name, Last Name, and Email, and an 'Edit User Account' link. The name 'James McGuinness' is visible in the bottom right corner of the page.



The screenshot shows the 'Filter Classrooms' section of the portal. It includes a search bar labeled 'Filter Classrooms'. Below the search bar are two dropdown menus: 'School Year Session' (set to 'All Sessions') and 'Program: Active During (Select Month & Year)'. There are three empty dropdown boxes for selecting the month and year. An 'Apply Filter' button is located below the filters. At the bottom of the section, there is a 'Create New Classroom' button with a plus sign icon, which is highlighted by a red arrow.

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:

Name:

Description:

Students: # Teachers: # Aides:

[+ Assign Teachers/Aides]

Assigning Teacher/Aide To Classrooms

* Click on (+Assign Teachers/Aides) link

Classroom Information


School Year: more/less

Program:

Name:

Description:

Students: # Teachers: # Aides:

[+ Assign Teachers/Aides] 

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

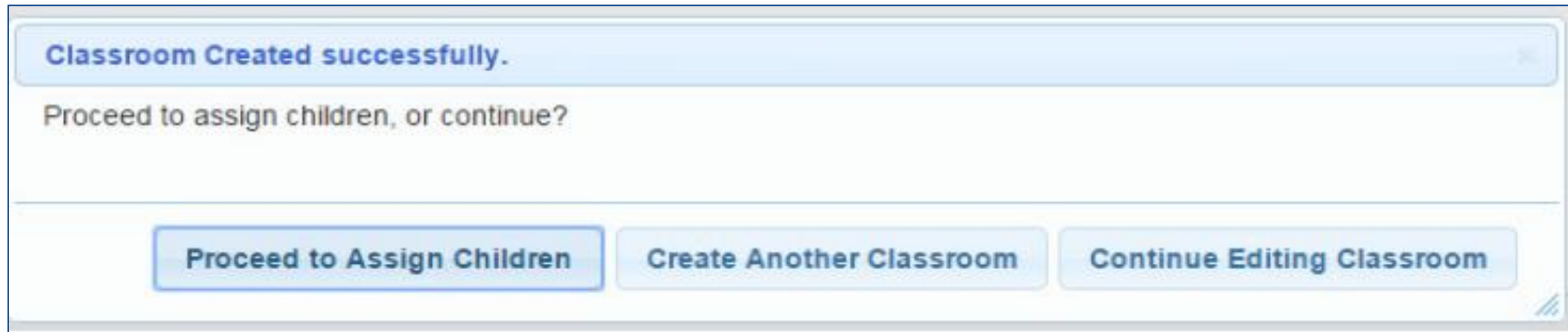
Select	LastName	FirstName	Role
<input type="checkbox"/>			Teacher ▼
<input checked="" type="checkbox"/>			Teacher ▼
<input checked="" type="checkbox"/>			Aide ▼
<input type="checkbox"/>			Teacher ▼
<input checked="" type="checkbox"/>			Aide ▼
<input type="checkbox"/>			Teacher ▼
<input type="checkbox"/>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

← Assign Select All

Create Classroom ←

Assigning Teacher/Aide To Classrooms

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



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
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

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

Classroom: 2.5 HR AM

Assigned to Classroom

No children currently assigned to classroom.

Select All Unassign →

Not Assigned [+ Filter Unassigned Children]

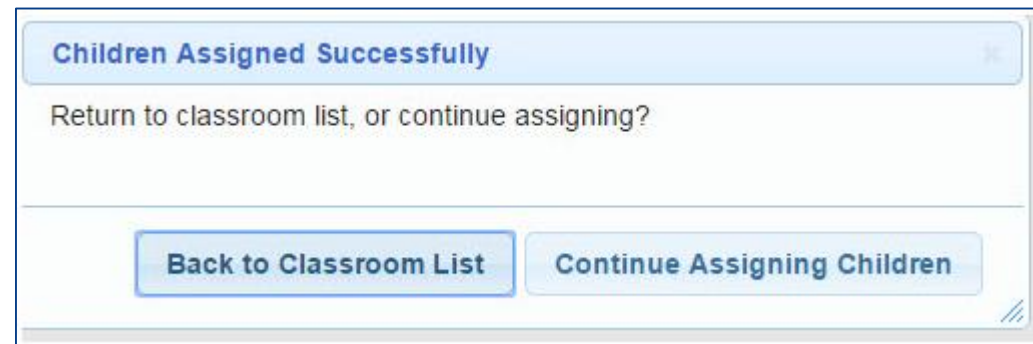
Select	Last Name	First Name	District	County	DOB	Details
<input checked="" type="checkbox"/>			COHOES CITY SD	Albany	4/28/2010	Details

← Assign Select All

Save Changes

Assigning Children To Classrooms

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



Classroom List

- * 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"

Classroom List:

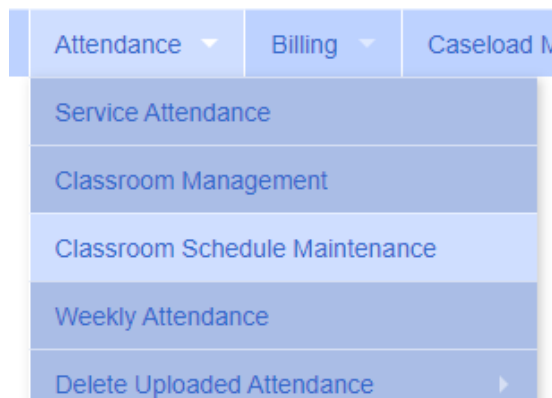
Home File Transfer Attendance and Billing Lookup Reports My Account People FAQ

[+ Filter Classrooms]

	Class	Description	School Year	Program	# Students	# Teachers	# Aides			
Attendance	(0:0:0)		2013 - 2014 Winter	9100	0	0	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	2.5 HR AM (0:1:1)	2.5 HR AM	2013 - 2014 Winter	9165	6	1	0	Edit Classroom	Assign Children	
Attendance	2.5 HR AM (12:1:2)	2.5 HR AM INTEGRATED	2014 - 2015 Winter	9165	0	1	2	Edit Classroom	Assign Children	Delete Classroom
Attendance	2.5 HR AM (12:1:3)	2.5 HR AM INTEGRATED	2014 - 2015 Winter	9165	0	1	2	Edit Classroom	Assign Children	Delete Classroom
Attendance	2.5 HR AM (12:1:2)	2.5	2013 - 2014 Winter	9100	0	0	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	2.5 HR AM (12:1:2)	2.5	2013 - 2014 Winter	9100	6	0	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	2.5 HR AM (12:1:2)	2.5	2013 - 2014 Winter	9100	0	0	0	Edit Classroom	Assign Children	Delete Classroom
Attendance	2.5 Hr AM SUMMER (0:0:0)		2014 - 2015 Summer	9165	4	1	0	Edit Classroom	Assign Children	
Attendance	2.5 Hr AM Winter (0:0:0)	2.5 HR AM	2014 - 2015 Winter	9165	6	1	0	Edit Classroom	Assign Children	
Attendance	2.5 HR PM (0:0:0)	2.5 HR PM	2013 - 2014 Winter	9165	5	1	0	Edit Classroom	Assign Children	
Attendance	2.5 HR PM (0:0:0)	2.5 HR PM	2010 - 2011 Winter	9160	0	1	0	Edit Classroom	Assign Children	Delete Classroom

Creating a Schedule for the School

- * 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.



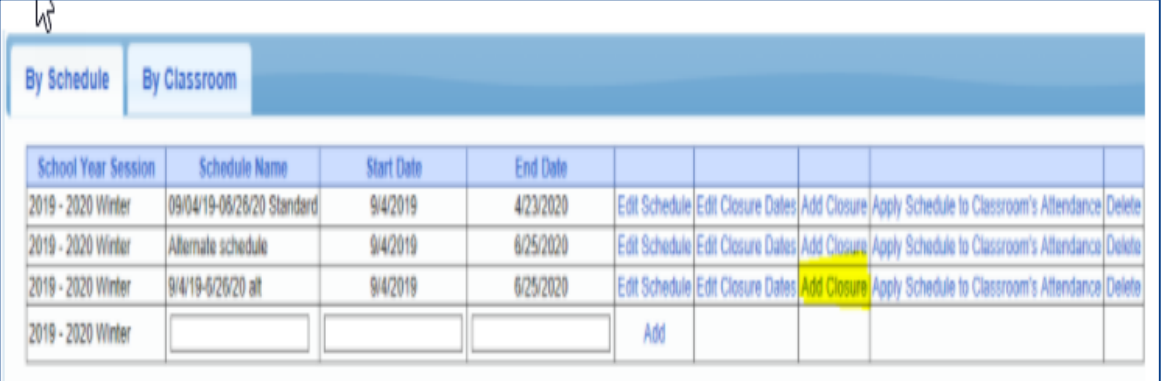
The screenshot shows the 'By Schedule' interface. At the top, there are dropdown menus for 'Provider' (EARLY SUCCESS INC) and 'School Year Session' (2019 - 2020 Winter). Below this are two tabs: 'By Schedule' (selected) and 'By Classroom'. The main area contains a table with columns for 'School Year Session', 'Schedule Name', 'Start Date', 'End Date', and several action buttons. The table has three rows, with the last row having an 'Add' button.

School Year Session	Schedule Name	Start Date	End Date					
2019 - 2020 Winter	09/04/19-06/26/20 Standard	9/4/2019	4/23/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter	Alternate schedule	9/4/2019	6/25/2020	Update Cancel	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter	9/4/19-6/26/20 alt	09/04/2019	06/25/2020	Add				

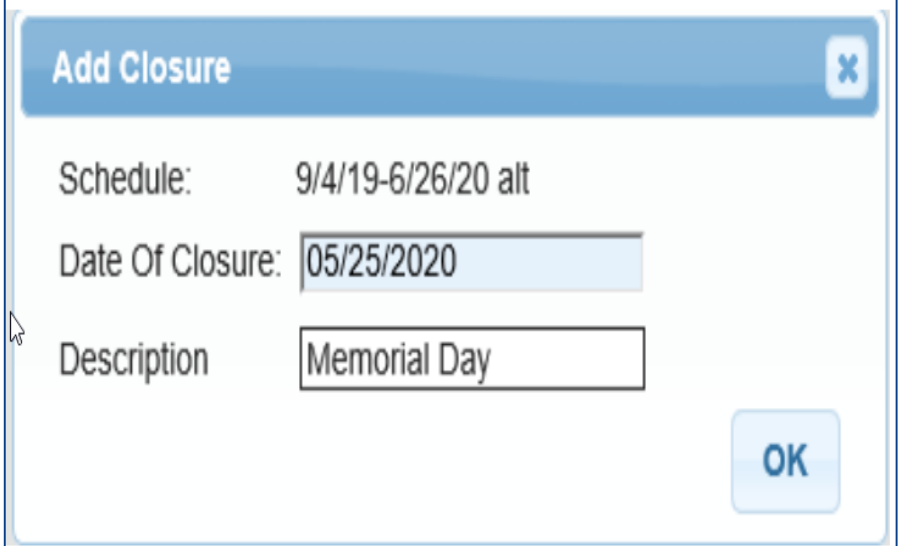
At the bottom of the table, there is a partial row with the following data: 2019 - 2020 Winter, 9/4/19-6/26/20 alt, 09/04/2019, 06/25/2020, Add, and three empty cells.

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.



School Year Session	Schedule Name	Start Date	End Date					
2019 - 2020 Winter	09/04/19-06/26/20 Standard	9/4/2019	4/23/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter	Alternate schedule	9/4/2019	6/25/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter	9/4/19-6/26/20 alt	9/4/2019	6/25/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter				Add				



Add Closure [X]

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

Date Of Closure: 05/25/2020

Description: Memorial Day

OK

Editing a Closure Date

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

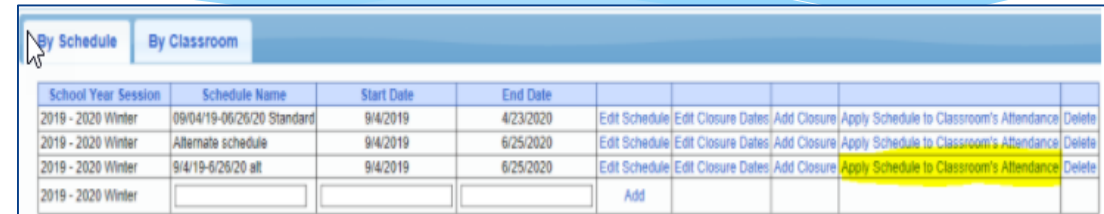
By Schedule		By Classroom						
School Year Session	Schedule Name	Start Date	End Date					
2019 - 2020 Winter	09/04/19-06/26/20 Standard	9/4/2019	4/23/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter	Alternate schedule	9/4/2019	6/25/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter	9/4/19-6/26/20 alt	9/4/2019	6/25/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 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

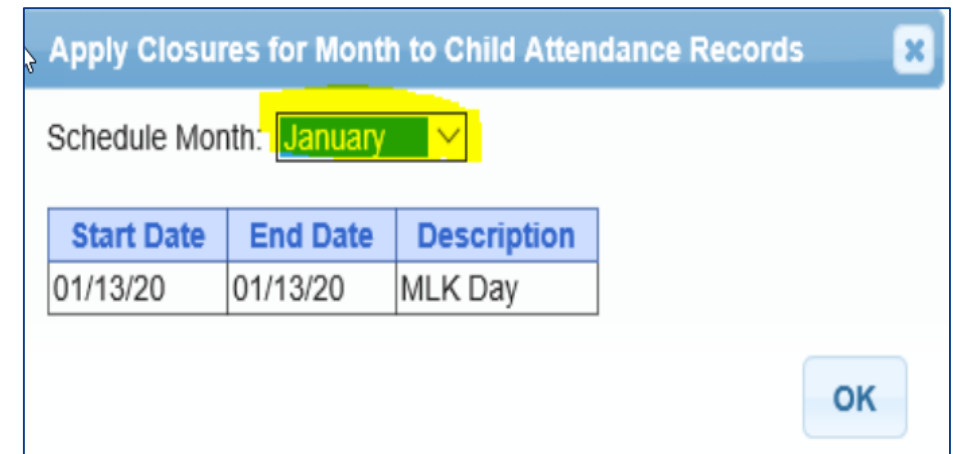
Start Date	End Date	Closure Description		
1/13/2020	1/13/2020	MLK Day	Edit	Delete
5/25/2020	5/25/2020	Memorial Day	Edit	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	Add	

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.



School Year Session	Schedule Name	Start Date	End Date	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter	09/04/19-06/26/20 Standard	9/4/2019	4/23/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter	Alternate schedule	9/4/2019	6/25/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter	9/4/19-6/26/20 all	9/4/2019	6/25/2020	Edit Schedule	Edit Closure Dates	Add Closure	Apply Schedule to Classroom's Attendance	Delete
2019 - 2020 Winter				Add				

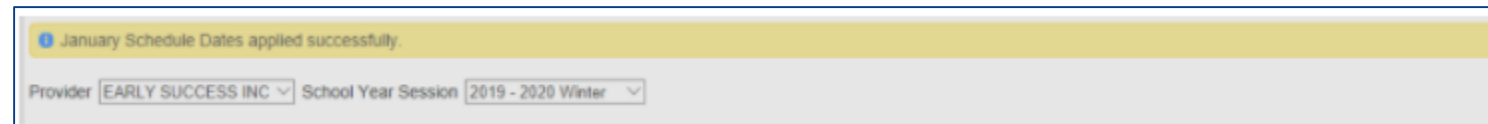


Apply Closures for Month to Child Attendance Records

Schedule Month: **January**

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

OK



January Schedule Dates applied successfully

Provider: EARLY SUCCESS INC School Year Session: 2019 - 2020 Winter

Adding Closures to Classrooms

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

Provider: EARLY SUCCESS INC School Year Session: 2019 - 2020 Winter

By Schedule **By Classroom**

Classroom Name	Description	School Year Session	Program	Schedule				
AQ - 1 AM	AQ - 1 AM	2019 - 2020 Winter	9100	09/04/19-06/26/20 Standard	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
AQ - 2	AQ - 2	2019 - 2020 Winter	9160	09/04/19-06/26/20 Standard	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
AQ - 3 AM	AQ - 3 AM	2019 - 2020 Winter	9165	09/04/19-06/26/20 Standard	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
AQ - 5	AQ - 5	2019 - 2020 Winter	9100	09/04/19-06/26/20 Standard	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
AQ - 6	AQ - 6	2019 - 2020 Winter	9160	09/04/19-06/26/20 Standard	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign

Add Closure [X]

Schedule: Classroom: AQ - 1 AM

Date Of Closure: 05/25/2020

OK

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.

Classroom Name	Description	School Year Session	Program	Schedule				
AQ - 1 AM	AQ - 1 AM	2019 - 2020 Winter	9100	09/04/19-06/26/20 Standard	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign
AQ	AQ - 2	2019 - 2020 Winter	9160	09/04/19-06/26/20 Standard	Assign	Add Closure	Apply Schedule to Classroom's Attendance	Unassign

Enrollment & ESID

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

Unmatched Children and Enrollments

- ❖ Typically, all information about a child and the services they are receiving are entered by the County and uploaded into CPSE Portal
- ❖ “Unmatched [child or enrollment]”: temporary [child or enrollment] records
- ❖ Once the County uploads the official information, the agency can “match” the temporary records to the County created record. When they do that, any data entered for the temporary record is moved to the County created one and then the temporary one is deleted.
- ❖ Unmatched children do not have an ESID

Child Lookup

❖ Lookup > Child Lookup



❖ Enter the start of the child's last name and click Search

❖ Find the child and click Details

❖ Wildcard searches can be done by using “%” ex. Search “%son” returns Wilson, Sampson, Thompson, etc.

Child Lookup

Last Name [Show Advanced Search options]

Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	Details
SCHAFFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	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

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

Child Lookup

Last Name [Show Advanced Search options]



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

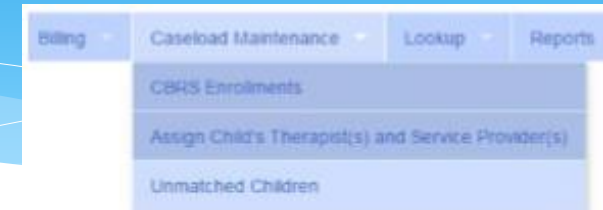
Child Lookup

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

School Year County Provider District

Child Number STAC ID Electronic Service ID Medicaid CIN

Unmatched Children



❖ Navigate top menu to Caseload Maintenance > Unmatched Children

Unmatched Children

Add Child



Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone				
AYERS	EARLENE		8/14/2011	ERIE	Buffalo			NY			Enrollments	Attempt Match	Edit	Delete
CUMMINS	VENA		5/29/2011	ERIE	North Collins			NY			Enrollments	Attempt Match	Edit	Delete
CUNNINGHAM	THERESIA		8/2/2011	ERIE	Frontier			NY			Enrollments	Attempt Match	Edit	Delete

Adding an Unmatched Child

- ❖ Click Add Child button on Unmatched Children Screen
- ❖ Enter in the information
- ❖ Required fields
 - ❖ County
 - ❖ District
 - ❖ Last Name
 - ❖ First Name
 - ❖ DOB
 - ❖ Gender
- ❖ All other fields optional

The screenshot shows a web form titled "Add Child" with a close button in the top right corner. The form contains the following fields:

- Provider: HIGHER LEARNING, LLC (dropdown)
- County: ERIE (dropdown) | District: (dropdown)
- Last Name: (text input) | First Name: (text input) | MI:
- DOB: (text input) | Gender:
- Address 1: (text input) | Address 2: (text input)
- City: (text input) | State: New York (dropdown) | Zip: (text input)
- Home Phone: (text input)
- SEDSTACID: (text input)

A red rectangular box highlights the County, District, Last Name, First Name, DOB, and Gender fields, indicating they are required.

At the bottom left of the form is a blue "Add" button.

Editing an Unmatched Child

Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone				
AYERS	EARLENE		8/14/2011	ERIE	Buffalo			NY			Enrollments	Attempt Match	Edit	Delete
CUMMINS	VENA		5/29/2011	ERIE	North Collins			NY			Enrollments	Attempt Match	Edit	Delete

❖ You can edit

❖ Name

❖ Date of Birth

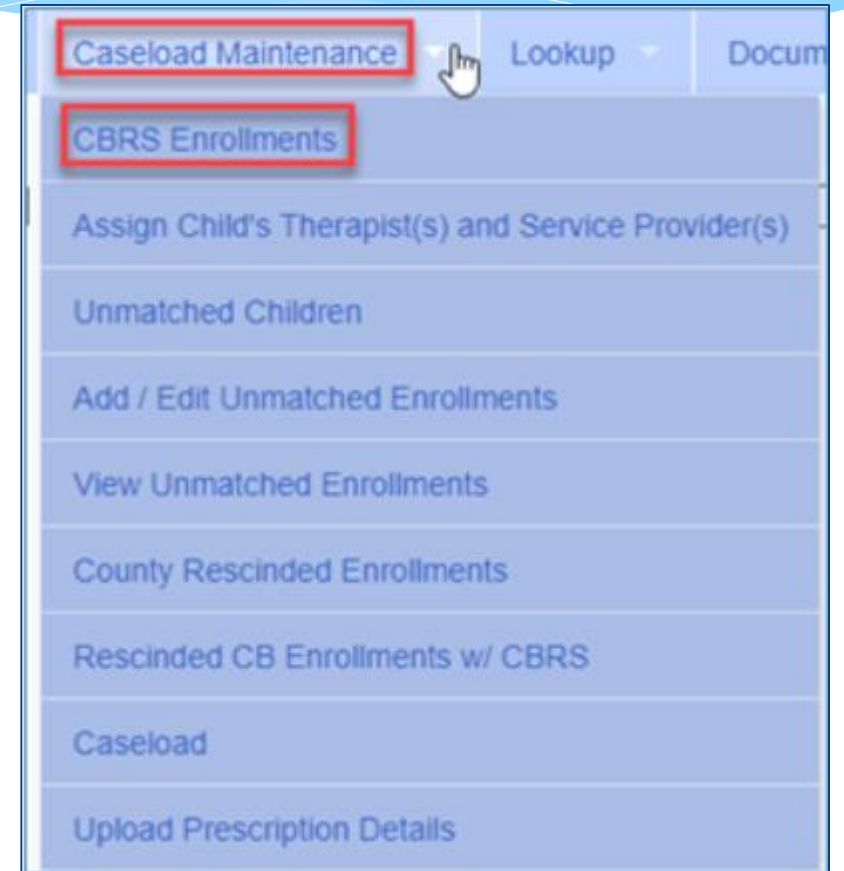
❖ District

❖ Click “Update” to save your changes

Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone				
AYERS	EARLENE		8/14/2011	ERIE	Buffalo			NY			Enrollments	Attempt Match	Update	Cancel
CUMMINS	VENA		5/29/2011	ERIE	North Collins			NY			Enrollments	Attempt Match	Edit	Delete

Entering Unmatched CBRS Enrollments

- * Once the child is in the CPSE Portal (either in the system from prior services or has been entered as an unmatched child) and the Center-Based (CB) unmatched enrollment has been created, you can now add the Center-Based Related Service (CBRS) Enrollments.
- * Go to Caseload Maintenance>CBRS Enrollments



Entering Unmatched CBRS Enrollments

- * First search for the Center Based enrollment
- * Select the correct session, enter the child's information (Last Name, First Name, DOB)
- * Click SEARCH.

CB Enrollments

Session Provider County

Last Name First Name DOB

Entering Unmatched CBRS Enrollments

- * Click "SELECT" at the end of the row for the correct child.

County	District	Last Name	First Name	ElectronicServiceID	Provider	Program	Start Date	End Date	
NASSAU	FRANKLIN SQUARE UFSD	SCOTT	ANDREW	CB1516W0053700	MISERICORDIA UNIVERSITY SPEECH-LANGUAGE AND HEARING CENTER	9160-	09/02/2015	01/14/2016	Select 
NASSAU	FRANKLIN SQUARE UFSD	SCOTT	ANDREW	CB1516W0054977	MISERICORDIA UNIVERSITY SPEECH-LANGUAGE AND HEARING CENTER	9160-	01/19/2016	06/24/2016	Select

Entering Unmatched CBRS Enrollments

- * Upon selecting an enrollment, the bottom of the page will display a grid with the “Included Services For” and fill in the following data:
 - * From and To dates
 - * RS type (OT/PT/ST)
 - * Individual or Group
 - * Units (Frequency/Duration)
 - * Timespan (Weekly, Monthly, etc.)
 - * Click ADD
- * You will need to do this for each IEP ordered service included in the child's center-based program as listed on the IEP.
- * The last row is blank to add new rows
- * You can also edit existing rows

ElectronicServiceID	From	To	RS Type	I or G	Units	Minutes	Timespan	
CPSECBRS0000004359	9/2/2015	6/24/2016	OT	I	2.00	30	WEEKLY	Edit
CPSECBRS0000004360	9/2/2015	6/24/2016	ST	I	2.00	30	WEEKLY	Edit
CPSECBRS0000004361	9/2/2015	6/24/2016	PT	I	2.00	30	WEEKLY	Edit
	<input type="text" value="1/19/2016"/>	<input type="text" value="6/24/2016"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="Weekly"/>	Add

View Unmatched Enrollments

- ❖ Go to Caseload Maintenance > View Unmatched Enrollments
- ❖ Use this report to match children and enrollments or to delete an unmatched enrollment.

County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description				
WESTCHESTER	TRAMONTOZZI	LUKE	12/23/13	201718	02/26/18	06/22/18	RS	ST	1x45	Attendances		Attempt Enrollment Match	Delete
WESTCHESTER	Weintraub	Shoshana	02/26/16	201920	09/03/19	06/26/20	RS	ST	2x45	Attendances	Attempt Child Match		Delete

Matching Children

- ❖ **Billing cannot be submitted to the County on “Unmatched” children/enrollments.** They can only be submitted for County created enrollments
- ❖ In order to address this, you need to “Match” the temporary/placeholder entry to a County created one and then the data will be merged into the County created entry
- ❖ You can “Attempt Match” from Unmatched Children screen

Inmatched Children [Add Child](#)

Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone				
BLUM	MERIL		3/24/2012	ERIE	Fronter			NY			Enrollments	Attempt Match	Edit	Delete

- ❖ Or Attempt Child Match from View Unmatched Enrollments

Inmatched 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

Matching Children

Match Child Against County-Imported Child

Current Unmatched Child:

BLUM, MERIL County: ERIE District: Frontier DOB: 3/24/2012

Potential Matches:

DOB To Match

Showing children matching the DOB, and with the same first letters ("BLU") in their last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	BLUM	MERYL		3/24/2012	ERIE	Frontier	2250 STATE RTE 32		NY		

- ❖ The top of the screen will show the information you entered for the child
- ❖ The bottom shows the potential matches
- ❖ You can alter potential match search criteria for DOB and First ? letters of their last name
- ❖ **Make sure the child you are selecting to match is the correct one and click select**

Confirming your Child Match

- ❖ Click Select to choose the Count created child that matches your agency entered child.
- ❖ 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

Showing children matching the DOB, and with the same first 3 letters ("BLU") in their last name.

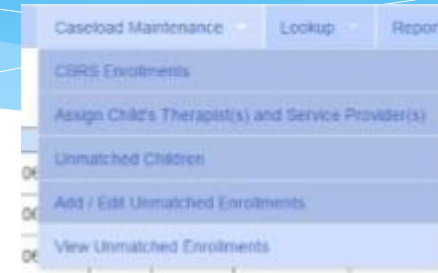
	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	BLUM	MERYL		3/24/2012	ERIE	Frontier	2250 STATE RTE 32		NY		

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.

BLUM, MERIL (3/24/2012) → BLUM, MERYL (3/24/2012)

Match!

Matching Enrollments



❖ 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 child is an Unmatched child (agency created) you can Attempt Child Match
- ❖ If the enrollment has potential matches (same child and service type), the “Attempt Enrollment Match” link appears

Matching Enrollments to County Created Entries

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

Match Enrollment Against County-Imported Enrollment

Child:
SHELDON, NEAL County: ERIE District: Orchard Park DOB: 7/22/2011

Current Unmatched Enrollment:
Session: 2015 - 2016 Winter From Date: 3/30/2016 To Date: 6/24/2016
Enrollment Type: RS Service Type: ST Individual or Group: I Frequency: 1x30

Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2015 - 2016 Winter	9/1/2015	6/30/2016	I	2x30	RS1516W0081795

Confirm Enrollment Match

- ❖ When you select an enrollment to Match, you will be prompted to confirm the information.
- ❖ Double check the information is correct.
- ❖ If it is correct, click Match

Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2015 - 2016 Winter	9/1/2015	6/30/2016	I	2x30	RS1516W0081795

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
(3/30/2016 - 6/24/2016)
1x30

→

RS1516W0081795
(9/1/2015 - 6/30/2016)
2x30

Match!

Entering Classroom Attendance

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

Filter Classrooms

Session: Program: Active During (Select Month & Year):

Attendance	Class	Description	School Year	Program	# Students	# Teachers	# Aides		
Attendance	AQ - 1 AM (29:0:0)	AQ - 1 AM	2019 - 2020 Winter	9100	8	1	0	Edit Classroom	Assign Children
Attendance	AQ - 2 (97:0:0)	AQ - 2	2019 - 2020 Winter	9160	7	1	0	Edit Classroom	Assign Children
Attendance	AQ - 3 AM (82:0:0)	AQ - 3 AM	2019 - 2020 Winter	9165	8	2	0	Edit Classroom	Assign Children

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)	

Entering Classroom Attendance

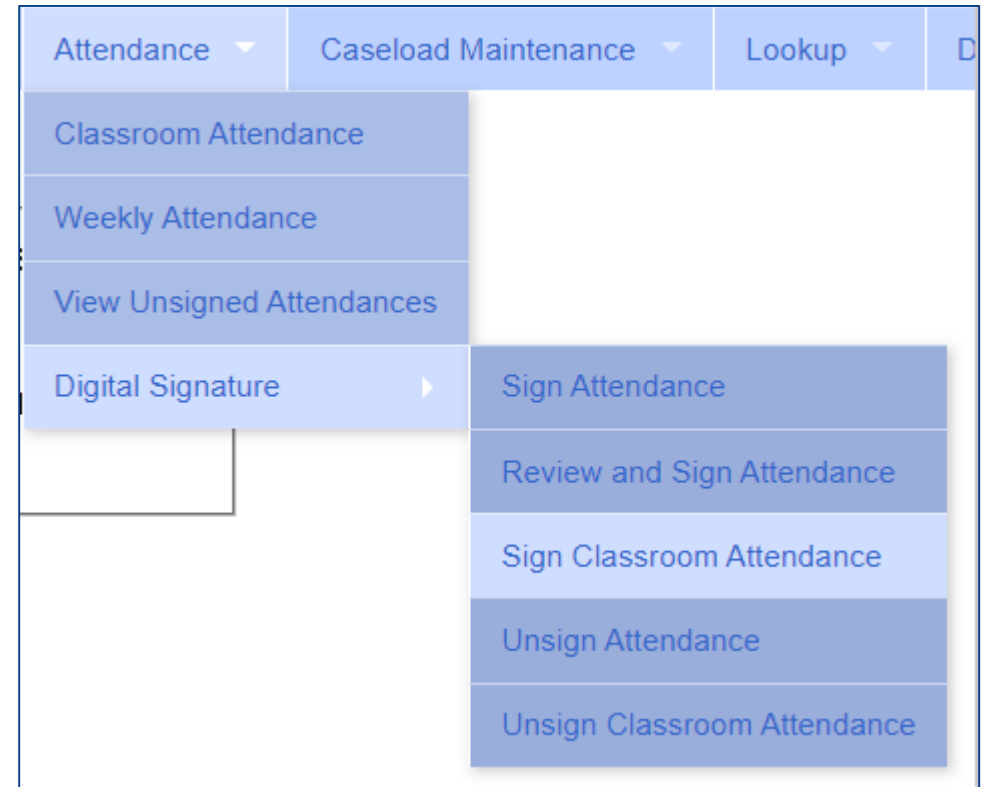
- * If a child is present single click on the day and it will be highlighted in green. Green indicates child was present for that day. If all the children were present for a day click on the checkbox next to the day all the attendances will be highlighted in yellow.
- * If the child was absent double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

Tue <input checked="" type="checkbox"/>	Wed <input checked="" type="checkbox"/>	Thu <input checked="" type="checkbox"/>	Fri <input checked="" type="checkbox"/>
05/26/20	05/27/20	05/28/20	05/29/20
Green	Green	Green	Green
Red	Green	Green	Red
Red	Green	Green	Green
Green	Red	Red	Green
Green	Red	Green	Green
Green	Green	Green	Green
Green	Green	Green	Green
Green	Green	Red	Green

Total Sessions: 40

Signing Classroom Attendance

- * Go to Attendance > Digital Signature > Sign Classroom Attendance



CB Enrollments Missing Attendance

- * There are several reasons why CB Enrollments may be missing attendances.
- * Here are the primary reasons:
 - * The attendance has been added or modified (matched, signed/co-signed)
 - * The attendance is on an unmatched enrollment (no ESID)
 - * Match to County Created enrollment
 - * The attendance is missing a Signed Date or Cosigned Date
 - * Have the therapist/supervisor sign or co-sign the attendance
 - * The rates have not yet been uploaded
 - * This can be checked by going to Lookup -> Enrollment Lookup -> Select the School Year Session, County, Provider, and Enrollment Type
 - * The column on the right that reads "Rates" will show if there is anything there other than \$0

CB Enrollments Missing Attendance

- * Use Child Lookup screen to find the child and click on the details to see the child details
- * On the Enrollment list for that child, find the enrollment corresponding to the attendances you want to bill
- * Make sure the row has an ESID (is a County created enrollment). If there is no ESID, it cannot be billed. You need to match this enrollment to a County created enrollment
- * Click the Attendance link to view the attendance list

Child Details (ORTEGA, RENE) [<< Back to Search Result](#)

DOB: 2/19/2012 Gender: M County: ERIE
Address: 3094 62nd Street District: Orchard Park
. NY Matched?: Y

View information for School Year: 2015 - 2016

Enrollments

Strikethrough = The county deleted this enrollment

Status	School Year	From	To	ESID	Provider	Enrollment	Service	Frequency	Individual Or Group	
	2015 - 2016 Winter	2/2/2016	6/30/2016	RS1516W0082830	HIGHER LEARNING, LLC	RS	ST	3x30	I	Attendances
	2015 - 2016 Winter	9/1/2015	2/1/2016	RS1516W0079642	HIGHER LEARNING, LLC	RS	ST	2x30	I	Attendances

CB Enrollments Missing Attendance

- * Make sure the attendance exists in the list.
 - * If it does not appear, then it is not in the system, or it is entered under a different child or different enrollment
- * Make sure there is a date in the Signed Date column
 - * If it is empty, have the therapist sign it
- * Make sure there is a date in the Co-Signed Date column (even if no co-signature is required for that therapist)
 - * If the therapist requires a co-signature, have the supervisor co-sign
 - * If the therapist does not require a co-signature, have the therapist make sure that their profile only lists their licensed credential (SLP and not TSHH). Have the therapist un-sign and resign.
- * Make sure the Voucher # is empty.
 - * If it is on another voucher that has not been submitted to the County you can edit that other vouchers details and remove it. If the voucher has been submitted to the County and the County denied it and you would like to rebill it, follow the rebilling process.

Attendance List												
Child Name: ORTEGA, RENE		County: ERIE		Provider: HIGHER LEARNING, LLC		District: Orchard Park						
ESID: RS161750083850		From/To: 7/1/2016-8/31/2016		Service: RS-ST (IND)		Frequency: 2x30						
Service Date	Make Up	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #
07/12/16		11:00 AM	11:30 AM	:30	1.00	30	CECILA CUELLAR	Home	I	07/12/16	07/12/16	RS160731064200
07/14/16		11:00 AM	11:30 AM	:30	1.00	30	CECILA CUELLAR	Home	I			
07/26/16		11:15 AM	11:45 AM	:30	1.00	30	CECILA CUELLAR	Home	I			

Upcoming Webinars

- * Case Management (Independents)

- * 5/18 @ 2:30 pm <https://attendee.gotowebinar.com/register/20733904658987792>

- * 5/19 @ 11:00 am <https://attendee.gotowebinar.com/register/3296188939408361744>

- * Case Management (Agency Service Providers)

- * 5/25 @ 2:30 pm <https://attendee.gotowebinar.com/register/1866210295811328272>

- * 5/26 @ 11:00 am <https://attendee.gotowebinar.com/register/1710046659318322960>

Follow-Up

- * This presentation will be recorded and the PowerPoint presentation will be uploaded to the Portal Knowledge Base for future reference.
- * **Helpful Knowledge Base Articles:**
 - * Classroom Management
 - * <http://http://support.cpseportal.com/kb/a42/classroom-management.aspx>
 - * Creating a Schedule for the School
 - * <http://support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx?KBSearchID=16564>
 - * Entering Unmatched CBRS Enrollments
 - * <http://support.cpseportal.com/kb/a254/entering-unmatched-cbrs-enrollments.aspx?KBSearchID=16570>
 - * Entering Classroom Attendances
 - * <http://support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=16571>
 - * Articles on Unmatched Children/Enrollments:
 - * <http://support.cpseportal.com/kb/c11/enrollments.aspx>
- * Search for help in our **Knowledge Base:** <http://support.cpseportal.com/main/default.aspx>
- * Email the **CPSE Portal Support Team:** support@CPSEPortal.com