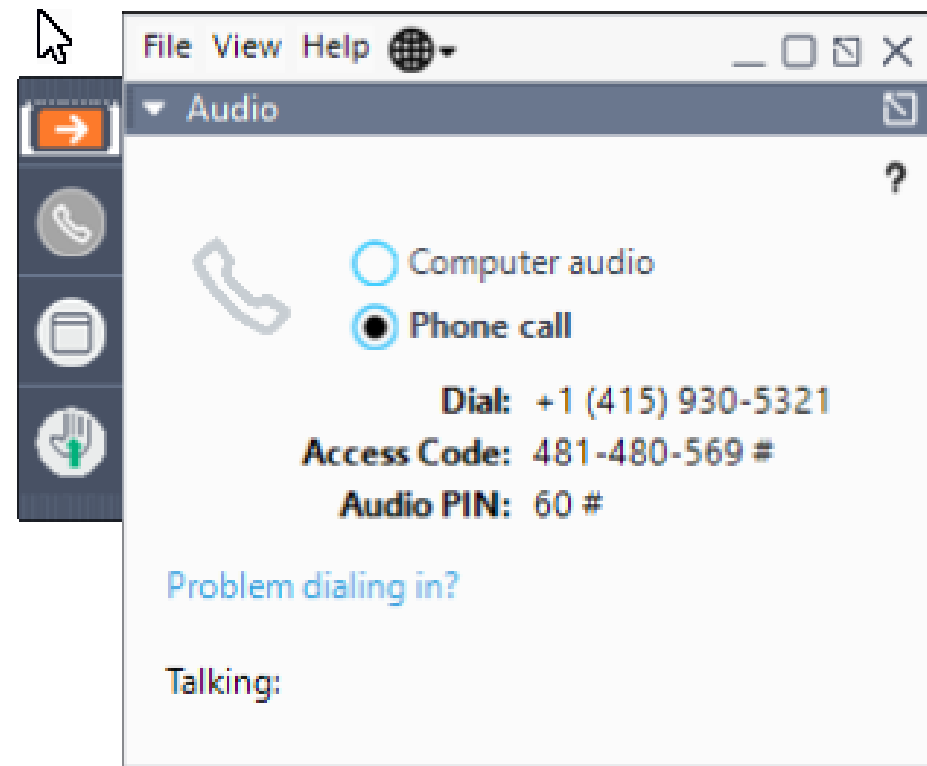
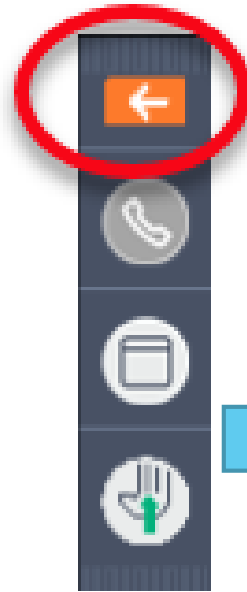


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

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

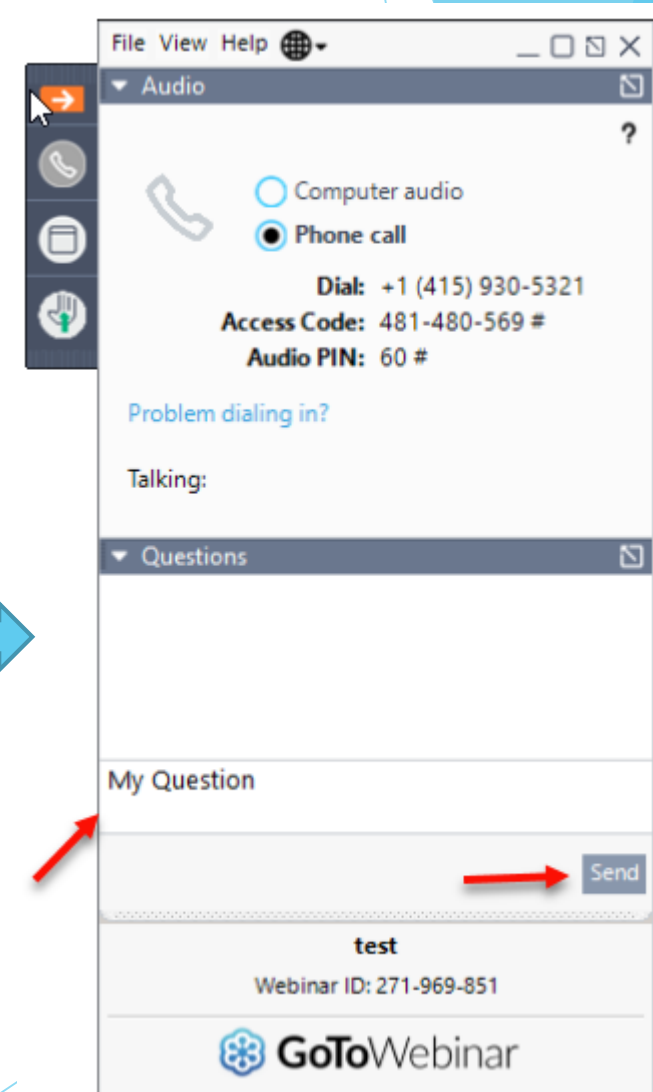
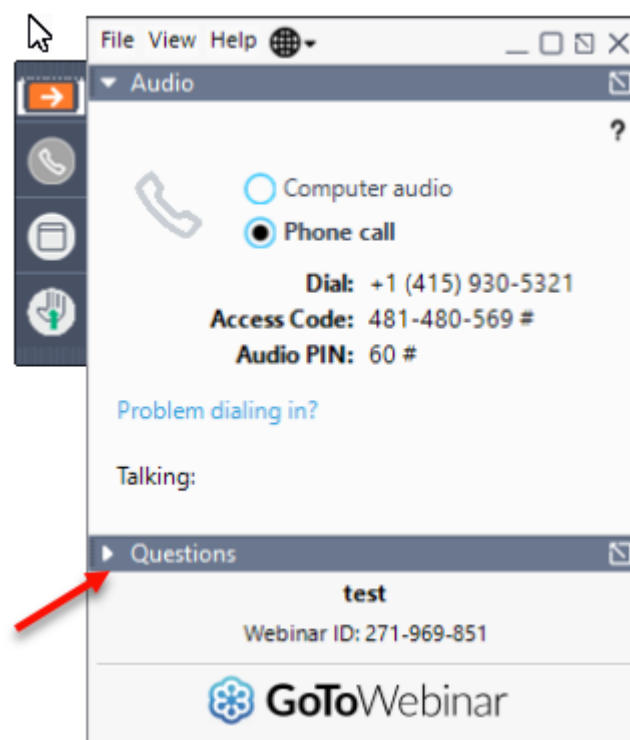


Communicating with Presenter

- ▶ 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



Case Management

Agency Service Providers

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

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

How to find an ESID

- ❖ Use Child Lookup to view enrollments for a child

View Information for School Year: 2015 - 2016 ▾

Enrollments

| Status | School Year | From | To | ESID | Provider | Enrollment | Service | Frequency | Strike |
|--------|--------------------|------------|------------|----------------|----------------------|------------|---------|-----------|--------|
| | 2015 - 2016 Winter | 12/1/2015 | 6/30/2016 | RS1516W0082349 | HIGHER LEARNING, LLC | RS | ST | 4x30 | |
| | 2015 - 2016 Winter | 10/21/2015 | 11/30/2015 | RS1516W0081747 | HIGHER LEARNING, LLC | RS | ST | 3x30 | |

- ❖ Use Enrollment Lookup to view List

Enrollments

2015 - 2016 Winter ▾ ERIE ▾ CBRS RS SEIT CB Search

HIGHER LEARNING, LLC ▾

| Status | ESID | Last Name | First Name | County | Provider | District | Enrollment Type | RS Type | Start | End | Frequency | Individual Or Group | Rate | |
|-----------|----------------|-----------|------------|--------|----------------------|----------|-----------------|---------|----------|-----------|-----------|---------------------|---------|-------------|
| | RS1516W0080337 | ABBOTT | NEDRA | ERIE | HIGHER LEARNING, LLC | Depew | RS | ST | 9/1/2015 | 6/30/2016 | 2x30 | I | 50.0000 | Attendances |
| | RS1516W0079786 | ADAIR | LURLINE | ERIE | HIGHER LEARNING, LLC | Buffalo | RS | ST | 9/1/2015 | 6/30/2016 | 2x30 | I | 50.0000 | Attendances |
| | RS1516W0079784 | ADDISON | ROBT | ERIE | HIGHER LEARNING, LLC | Buffalo | RS | ST | 9/1/2015 | 4/15/2016 | 2x30 | I | 50.0000 | Attendances |
| UnMatched | | AYERS | EARLENE | ERIE | HIGHER LEARNING, LLC | Buffalo | RS | ST | 2/2/2016 | 6/30/2016 | 2x30 | I | 0.0000 | Attendances |
| | RS1516W0079754 | BARNHART | LEATRICE | ERIE | HIGHER LEARNING, LLC | Ken/Ton | RS | ST | 9/1/2015 | 9/8/2015 | 3x30 | I | 50.0000 | Attendances |
| | RS1516W0079653 | BATEMAN | RIGOBERTO | ERIE | HIGHER LEARNING, LLC | Eden | RS | ST | 9/1/2015 | 6/30/2016 | 2x30 | I | 50.0000 | Attendances |

Excel

My Caseload

❖ Attendance > My Caseload

The screenshot shows a navigation menu with the following items: Home, File Transfer, Attendance, Billing, Lookup, Reports, and Medicaid. The 'Attendance' menu is open, showing 'My Caseload' and 'Service Attendance' as options. Below the menu, a message reads 'Login Successful' and 'You have logged in successfully'.

My Caseload

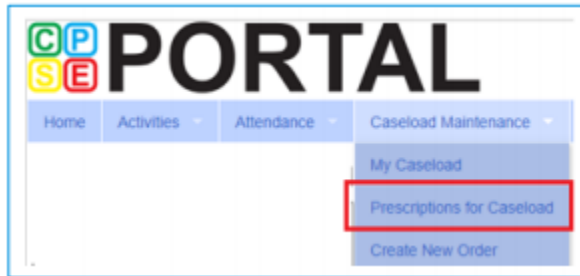
2014 - 2015 Winter ▼

Search

| ESID | Last Name | First Name | County | Provider | District | Enrollment Type | RS Type | From Date | To Date | Frequency | Individual Or Group | |
|----------------|-----------|------------|-------------|---------------------|-------------------------|-----------------|---------|-----------|-----------|--------------|---------------------|-------------|
| RS1415W0010987 | ATKINS | Sakina | SCHENECTADY | TrainingProvider100 | ROTTERDAM-MOHONASEN CSD | RS | ST | 2/2/2015 | 6/25/2015 | 1x30 | I | Attendances |
| RS1415W0011238 | BANK | Shays | SCHENECTADY | TrainingProvider100 | SCHALMONT CSD | RS | ST | 6/15/2015 | 6/25/2015 | 2x30 | I | Attendances |
| RS1415W0010516 | BIANCHINI | Nirob | SCHENECTADY | TrainingProvider100 | ROTTERDAM-MOHONASEN CSD | RS | ST | 9/3/2014 | 6/25/2015 | 2x30 | I | Attendances |
| RS1415W0017483 | MANNIX | Klay | Albany | TrainingProvider100 | GUILDERLAND CSD | RS | ST | 9/2/2014 | 6/19/2015 | 2x30 | I | Attendances |
| RS1415W0017279 | NYAHAY | Mikiala | Albany | TrainingProvider100 | GUILDERLAND CSD | RS | ST | 9/2/2014 | 6/19/2015 | 2x30 | I | Attendances |
| RS1415W0017284 | NYAHAY | Mikiala | Albany | TrainingProvider100 | GUILDERLAND CSD | RS | COR | 9/2/2014 | 6/19/2015 | 1x30 MONTHLY | I | Attendances |
| RS1415W0010461 | SACCONE | Mahlania | SCHENECTADY | TrainingProvider100 | ROTTERDAM-MOHONASEN CSD | RS | ST | 9/3/2014 | 6/25/2015 | 2x30 | I | Attendances |

Prescriptions for Caseload (SLPs ONLY)

- ❖ Caseload Maintenance > Prescriptions for Caseload



Use this option for initial prescriptions.

- ❖ Caseload Maintenance > Create New Order



Use this option for subsequent prescriptions – e.g., when there is a change in service and a previous Rx already exists.

Prescriptions for Caseload (SLPs ONLY)

- ❖ Caseload Maintenance > Prescriptions for Caseload
- ❖ Here you can find:
 - ❖ A list of children on your caseload
 - ❖ Status of your prescription (Entered, Verified, Invalidated, Missing)
 - ❖ Existing Speech Recommendations and enrollments that need one
- ❖ If you click on “VIEW” for the Rx Image, you will be able to view or print the digital speech recommendation

| ESID | Last Name | First Name | From Date | To Date | Description | Rx Status | Rx Entry | Rx Image | |
|-----------|-----------|------------|-----------|-----------|--------------------|-----------|---------------|-----------------|------------------------------|
| | | | 9/8/2020 | 6/25/2021 | ST 1x30 Individual | VERIFIED | View | View | |
| RS2021W01 | | | 9/8/2020 | 6/25/2021 | ST 1x60 Individual | MISSING | Enter Rx Info | Upload Rx Image | Create Speech Recommendation |
| RS2021W01 | | | 9/8/2020 | 6/25/2021 | ST 1x30 Individual | MISSING | Enter Rx Info | Upload Rx Image | Create Speech Recommendation |

Link is removed when Rx is completed.

View Child Activities by Therapist

❖ Reports > Therapist Activity

❖ Filter by

- ❖ Provider
- ❖ Therapist
- ❖ School Year
- ❖ Enrollment
- ❖ To and From Dates



View Child Activities by Therapist

Filters

Provider Therapist School Year Enrollment

From Date To Date

Show Notes Include Attendance / Treatment Logs

View Child Activities by Therapist

View Child Activities by Therapist

Filters

Provider: MID-HUDSON VALLEY EEC Therapist: Goldman, Emily School Year: 2020 - 2021 Enrollment: []

From Date: 09/06/2020 To Date: 10/28/2020

Show Notes Include Attendance / Treatment Logs [Search](#)

[Excel](#)

| Child | Service Provider | County | ESID | Enrollment Description | Activity | Attendance Type | Date | Start Time | End Time | Duration | Sessions To Bill | Notes |
|------------|------------------|----------|----------------------|--|------------|----------------------------|-----------|------------|----------|----------|------------------|---|
| [REDACTED] | [REDACTED] Emily | DUTCHESS | CBRS2021W [REDACTED] | CBRS (ST1) 9101-I 1x30 - G - (09/09/2020-06/24/2021) | Attendance | Provided Treatment Session | 9/14/2020 | 8:30 AM | 9:00 AM | 30 | 1.00 | Attendance Log Note: Various constructive toys presented (e.g. potato head, blocks, etc). Targeted turn- taking and requesting objects during functional play. Given indirect verbal cues and modeling, [REDACTED] was able to engage with a peer and verbally object and comment in 6/10 trials. |
| [REDACTED] | [REDACTED] Emily | DUTCHESS | CBRS2021W [REDACTED] | CBRS (ST1) 9101-I 1x30 - G - (09/09/2020-06/24/2021) | Attendance | Provided Treatment Session | 9/14/2020 | 8:30 AM | 9:00 AM | 30 | 1.00 | Attendance Log Note: Various constructive toys presented (e.g. potato head, blocks, etc). Targeted turn- taking and requesting objects during functional play. Given direct verbal cues and modeling, [REDACTED] was able to engage cooperatively in 3/5 trials. Direct verbal cues were required to decrease self-directed behavior and balance interaction with her peers. |
| [REDACTED] | [REDACTED] Emily | DUTCHESS | CBRS2021W [REDACTED] | CBRS (ST1) 9101-I 1x30 - G - (09/09/2020-06/24/2021) | Attendance | Provided Treatment Session | 9/14/2020 | 8:30 AM | 9:00 AM | 30 | 1.00 | Attendance Log Note: Various constructive toys presented (e.g. potato head, blocks, etc). Targeted greeting and requesting objects during functional play. Given discrete trial instruction, [REDACTED] was able to greet peers 3X, but did not establish eye contact. She required consistent verbal prompting as well as tactile and positional cues to request necessary materials and eliminate self directed behaviors in 5/10 trials. |
| [REDACTED] | [REDACTED] Emily | DUTCHESS | CBRS2021W [REDACTED] | CBRS (ST1) 9100-I 1x30 - G - (09/09/2020-06/24/2021) | Attendance | Provided Treatment Session | 9/14/2020 | 8:30 AM | 9:00 AM | 30 | 1.00 | Attendance Log Note: Various constructive toys presented (e.g. potato head, blocks, etc). Targeted turn- taking and requesting objects during functional play. Given discrete trial training, [REDACTED] requested toys from peers in 6/10 trials, but did not initiate interaction. Level of prompting was faded to indirect verbal cues following multiple examples of target behavior. |
| | | | | | | | | | | | | Attendance Log Note: [REDACTED] was presented with preferred toy to establish baseline language skills during symbolic play task. He was able to engage |

Upcoming Webinars

❖ Session Notes (All)

❖ 6/8 @ 2:30 pm

<https://attendee.gotowebinar.com/register/3632153513368448528>

❖ 6/9 @11:00 am

<https://attendee.gotowebinar.com/register/2853219893833351440>

❖ Ulster County Review/Q&A

❖ 7/13 @ 2:30 pm

<https://attendee.gotowebinar.com/register/5266566553159641871>

❖ 7/14 @ 10:30 am

<https://attendee.gotowebinar.com/register/667213756661032975>

❖ Please send your questions about any webinar topic covered so far to bborter@jmcguinness.com and we will review and answer your question in the Q&A webinar.

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:
 - ❖ Articles on Unmatched Children/Enrollments:
<http://support.cpseportal.com/kb/c11/enrollments.aspx>
 - ❖ How to look up a child by ESID:
<http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid-.aspx>
- ❖ Email the CPSE Portal Support Team: support@CPSEPortal.com