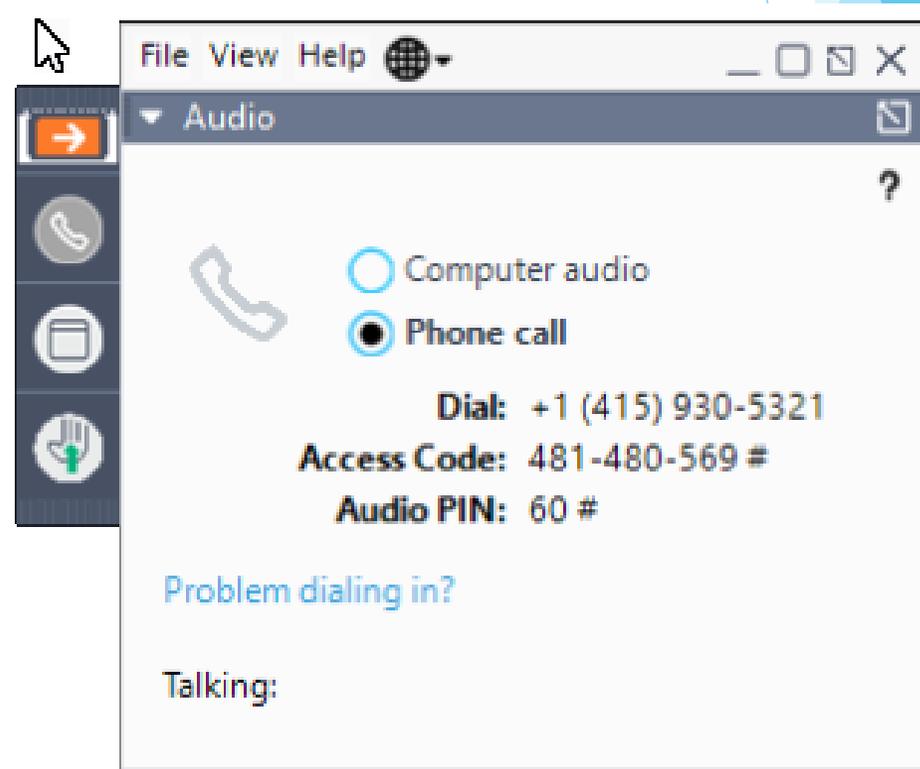


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

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

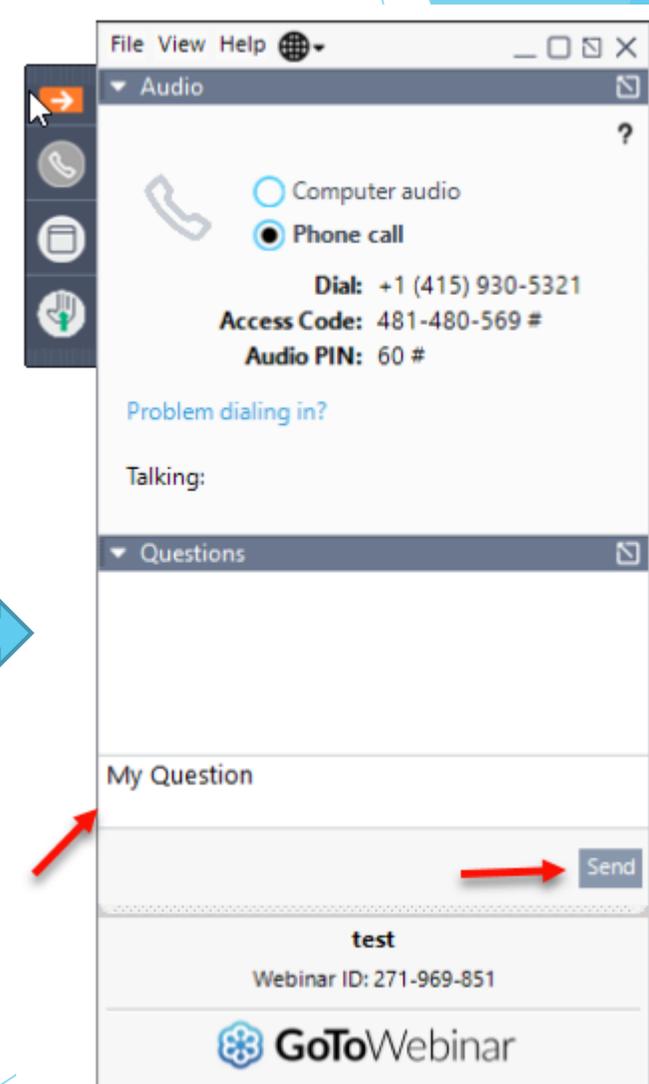
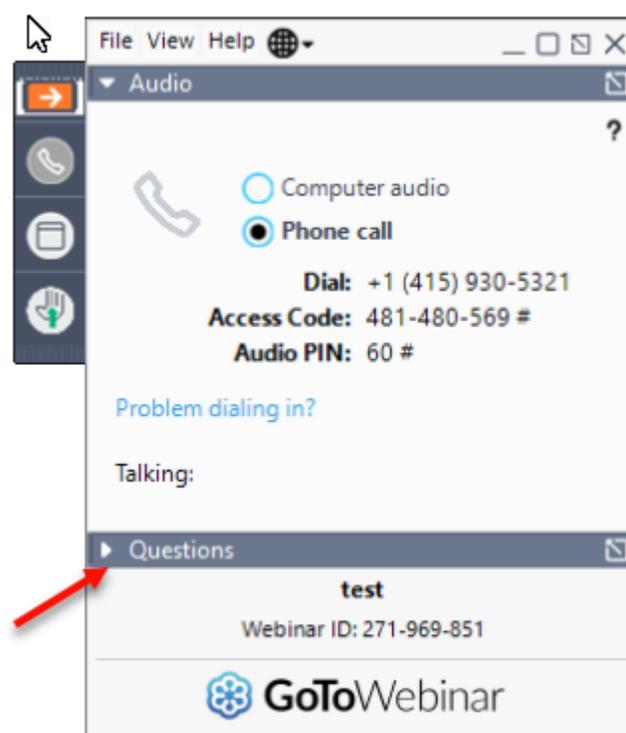


Communicating with Presenter

- ▶ 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

For Agencies

Topics Covered

- ❖ Child Lookup - *slide 7*
- ❖ Unmatched Children and Enrollments - *slide 9*
 - ❖ Adding/Editing an Unmatched Child
 - ❖ Adding/Editing an Unmatched Enrollments
- ❖ Assigning Enrollments to Therapist - *slide 17*
- ❖ Assigning Therapist to Children for CBRS/RS - *slide 19*
- ❖ Assigning SEIT Teacher to Children - *slide 21*
- ❖ View Unmatched Enrollments - *slide 23*
- ❖ Matching Children - *slide 24*
- ❖ Matching Enrollments - *slide 27*
- ❖ Enrollment Lookup Report - *slide 30*
 - ❖ How to find an ESID #
- ❖ Enrollment Assignments Report - *slide 34*

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

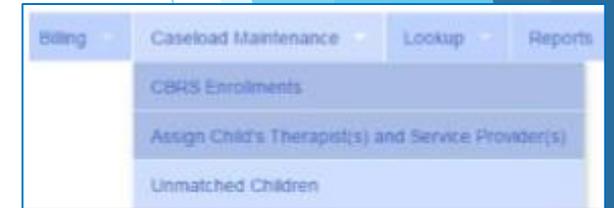
Child Number STAC ID Electronic Service ID Medicaid CIN

Unmatched Children & Enrollments

- ❖ Typically, all information about a child and the services they are receiving are entered by the County and uploaded into CPSE Portal
- ❖ However, an agency can create temporary child and enrollment records
- ❖ These are created when the County 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 they do that, any data entered for the temporary record is moved to the County created one 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 #

Adding an Unmatched Child

- ❖ Navigate top menu to Caseload Maintenance > Unmatched Children
- ❖ Click “Add Child” to add an Unmatched Child

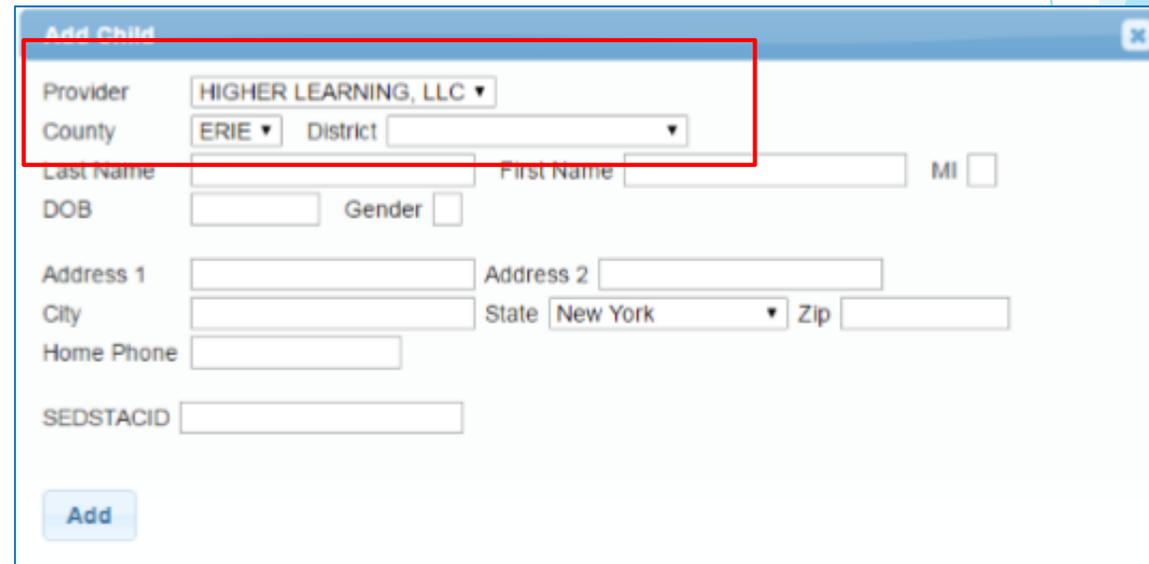


Unmatched Children [Add Child](#) 

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 several input fields. A red rectangular box highlights the "Provider" dropdown menu (set to "HIGHER LEARNING, LLC"), the "County" dropdown menu (set to "ERIE"), and the "District" dropdown menu. Below these are fields for "Last Name", "First Name", "MI" (checkbox), "DOB", and "Gender" (checkbox). Further down are "Address 1", "Address 2", "City", "State" (set to "New York"), "Zip", "Home Phone", and "SEDSTACID" fields. An "Add" button is located at the bottom left of the form.

Editing an Unmatched Child

- ❖ Click on “Edit” next to the child you would like to edit

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

Adding an Unmatched Enrollment

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan	
HIGHER LEARNING, LLC ▼	2015 - 2016 Winter ▼	09/13/15	06/24/16	RS ▼	OT ▼	I ▼	2	45	Weekly ▼	Add

- ❖ **Fields**
 - ❖ Session (School year and either summer session or 10-month Sep-Jun called winter)
 - ❖ From and To Dates
 - ❖ Enrollment Type
 - ❖ CB - tuition based classroom
 - ❖ SEIT/SEIS = Special Education Itinerant Teacher/Service
 - ❖ RS = Fee for Service Related Service (OT, PT, ST, etc.)
 - ❖ RS Type - OT, PT,
 - ❖ I or G is Individual vs. Group
 - ❖ Units/Minutes & Timespan refer to frequency (For ex. 2x45 Weekly)
- ❖ 2 = units
- ❖ 45 = minutes
- ❖ Weekly = Timespan

Adding Enrollments from Unmatched Children

- ❖ Click the Enrollments link on the child

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

- ❖ Enter your data on the blank row and click Add

Unmatched Enrollments
AYERS, EARLENE County: ERIE District: Buffalo DOB: 8/14/2011 [Redo Search](#)

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan		
HIGHER LEARNING, LLC	2015 - 2016 Winter	2/2/2016	6/30/2016	RS	ST	I	2.00	30	Weekly	Attempt Match	Delete
HIGHER LEARNING, LLC ▼	▼			▼	▼	▼			Weekly ▼	Add	

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 either Unmatched Children page or Add/Edit Unmatched Enrollments page
- ❖ For a County-created Child, you need to use Add/Edit Unmatched Enrollments



Adding Enrollments from Add/Edit Unmatched Enrollments

- ❖ Search for the child
- ❖ Click “Select” next to the child’s name

Unmatched Enrollments

Last Name [Show All]

	Last Name	First Name	DOB	SED STAC ID	District
 <input type="button" value="Select"/>	SMITH	SANFORD	9/16/2012	G04764	Cleveland H

- ❖ Enter your data on a blank row and click “Add”

Unmatched Enrollments

SMITH, SANFORD County: **ERIE** District: **Cleveland Hill** DOB: **9/16/2012**

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan	
HIGHER LEARNING, LLC ▾	<input type="text"/>	Weekly ▾	<input type="button" value="Add"/>							

Assigning Enrollments to Therapist

- ❖ Caseload Maintenance > Caseload
- ❖ Select therapist under “Person” dropdown and click Retrieve
- ❖ Click “Add New Assignment”

Add New Assignment

- ❖ Filter by Enrollment type, Service type, or Last Name and click “Retrieve” to bring up any enrollments that fit the description

Filter By

Provider LG INTERVENTION SPECIALISTS, INC. School Year Session 2019 - 2020 Winter Person: Retrieve

Assign Cases To BRANDON KELLY for the 201920 WIN session

Filter By...

Enrollment Type: (Any Enrollment Type) Service Type: (All Service Types) Last Name:

Items Per Page 50

Retrieve

Assign Selected to BRANDON KELLY

Return to Caseload

Assigning Enrollments to Therapist

- ❖ Select the enrollments you want to assign to this therapist and click “Assign Selected To [Therapist’s Name]”

Filter By...

Enrollment Type: (Any Enrollment Type) Service Type: ST Last Name:

Items Per Page 50

Assign Selected to BRANDON KELLY Return to Caseload

	Status	Last Name	First Name	ESID	From	To	Enrollment Type	RS Type	Freq	I/G	Provider	County	District	
<input type="checkbox"/>	UNMATCHED	ALDRICH	PORFIRIO		9/9/2019	6/26/2020	RS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALI	ADOLFO	CBRS1920W0000468	9/9/2019	10/14/2019	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALI	ADOLFO	CBRS1920W0000473	10/15/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input type="checkbox"/>		ALLEN	ADOLPH	CBRS1920W0000355	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALLISON	ADRIAN	CBRS1920W0000382	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Beacon	Attendance
<input type="checkbox"/>		ALLRED	KORY	CBRS1920W0000447	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input checked="" type="checkbox"/>		ALVARADO	AGUSTIN	CBRS1920W0000257	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Beacon	Attendance
<input checked="" type="checkbox"/>		AMBROSE	FREDRIC	CBRS1920W0000200	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Poughkeepsie	Attendance
<input type="checkbox"/>		ANAYA	DINO	CBRS1920W0000176	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Beacon	Attendance
<input type="checkbox"/>		ANDERSON	AL	CBRS1920W0000161	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Arlington	Attendance
<input checked="" type="checkbox"/>		ANDRADE	ALAN	CBRS1920W0000571	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Poughkeepsie	Attendance
<input type="checkbox"/>		ANDREWS	WANDA	CBRS1920W0000561	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Wappingers	Attendance
<input type="checkbox"/>		ANTHONY	ALBERTO	CBRS1920W0000391	9/9/2019	6/26/2020	CBRS	ST	2.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Arlington	Attendance
<input checked="" type="checkbox"/>		ARCHER	ALDEN	CBRS1920W0000128	9/9/2019	6/26/2020	CBRS	ST	4.00x 30 Weekly	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Arlington	Attendance
<input type="checkbox"/>		ARIAS	EARNESTINE	RS1920W0023296	10/7/2019	6/26/2020	RS	ST	2.00x 30 WEEKLY	I	LG INTERVENTION SPECIALISTS, INC.	DUTCHESS	Poughkeepsie	Attendance

- ❖ Click “Return to Caseload” to return to the previous therapist search page

Assigning Therapists to Children For CBRS/RS

- ❖ Caseload Maintenance > Assign Child's Therapist(s) and Service Provider(s)
- ❖ Search for a child and select the child you are working on
- ❖ Select the enrollment

The screenshot shows the CPSE Portal interface. The top navigation bar includes Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The user is logged in as TrainingProvider138.

Select a Child

Last Name: Search [Show Advanced Search options]

	Last Name	First Name	DOB	SED STAC ID	District	County
Select	ALLOCA	Trysten	10/17/2009	E44333	ALBANY CITY SD	Albany
Select	ALLOCCA	Isaberla	1/27/2007	D54522	ALBANY CITY SD	Albany

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Select a Child

ALLOCCA, Isaberla County: **Albany** District: **ALBANY CITY SD** DOB: **1/27/2007** Redo Search

Select an Enrollment

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

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Assigning Therapists to Children For CBRS/RS

- ❖ Select a therapist from the Available Therapists section
- ❖ Click “Add Therapist(s)/Service Provider(s)”
- ❖ To remove assigned therapists, select the therapist from the Assigned Therapists section and click “Remove Therapist”

https://training.cpseportal.com/Attendance/Assign_Child_Therapists_and_Service_Providers.aspx

Select a Child
ALLOCCA, Isabella County: Albany District: ALBANY CITY SD DOB: 1/27/2007 Redo Search

Select an Enrollment

Select	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
<input type="checkbox"/>	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
<input type="checkbox"/>	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
<input type="checkbox"/>	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
<input type="checkbox"/>	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
<input type="checkbox"/>	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

Assigned Therapists

	Last Name	First Name	NPI
<input type="checkbox"/>	ADONRI	Cordelle	1326290289
<input type="checkbox"/>	ALFARO	Oluwafolakemi Adebosipo	1497907604

Available Therapists

	Last Name	First Name	NPI
<input checked="" type="checkbox"/>	AFONSO	Yaurdin	176074476
<input type="checkbox"/>	AMALFITANO	Mechel	128588857
<input type="checkbox"/>	ARISTILDE	Mayana	
<input type="checkbox"/>	AUER	Lydia Nicole	
<input type="checkbox"/>	BARKET	Leisha	157881310
<input type="checkbox"/>	BARKOFF	Ean	179003880
<input type="checkbox"/>	BENCAL	Cheikhouna	
<input type="checkbox"/>	BHASIN	Daniel David	197285941
<input type="checkbox"/>	BODNER	Wakuv	147779985
<input type="checkbox"/>	BOTTJER	Eudasia	160901297
<input type="checkbox"/>	BOWEN	Rachel Hope	
<input type="checkbox"/>	BUCKLEY	William	

Remove Therapist

Add Therapist(s)/Service Provider(s)

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Assigning SEIT Teacher to Children

- ❖ Caseload Maintenance > Assign Child's Therapist(s) and Service Provider(s)
- ❖ Search for a child and select the child you are working on
- ❖ Select the SEIT enrollment

CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for **TrainingProvider138** (Logout)

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Select a Child

Last Name: Alloc Search [Show Advanced Search options]

	Last Name	First Name	DOB	SED STAC ID	District	County
Select	ALLOCA	Trysten	10/17/2009	E44333	ALBANY CITY SD	Albany
Select	ALLOCCA	Isaberla	1/27/2007	D54522	ALBANY CITY SD	Albany

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CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for **TrainingProvider138** (Logout)

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Select a Child

ALLOCCA, Isaberla County: **Albany** District: **ALBANY CITY SD** DOB: **1/27/2007** Redo Search

Select an Enrollment

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

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Assigning SEIT Teacher To Children

- ❖ Select a SEIT teacher from the Available Therapists section
- ❖ Click “Add Therapist(s)/Service Provider(s)”
- ❖ To remove assigned therapists, select the therapist from the Assigned Therapists section and click “Remove Therapist”

https://training.cpseportal.com/Attendance/Assign_Child_Therapists_and_Service_Providers.aspx

Select a Child
ALLOCCA, Isabella County: Albany District: ALBANY CITY SD DOB: 1/27/2007 Redo Search

Select an Enrollment

Select	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

Assigned Therapists

Last Name	First Name	NPI
<input type="checkbox"/> ADONRI	Cordelle	1326290289
<input type="checkbox"/> ALFARO	Oluwafolakemi Adebosipo	1497907604

Available Therapists

Last Name	First Name	NPI
<input checked="" type="checkbox"/> AFONSO	Yaurdin	176074476
<input type="checkbox"/> AMALFITANO	Mechel	128588857
<input type="checkbox"/> ARISTILDE	Mayana	
<input type="checkbox"/> AUER	Lydia Nicole	
<input type="checkbox"/> BARKET	Leisha	157881310
<input type="checkbox"/> BARKOFF	Ean	179003880
<input type="checkbox"/> BENCAL	Cheikhouna	
<input type="checkbox"/> BHASIN	Daniel David	197285941
<input type="checkbox"/> BODNER	Wakuv	147779985
<input type="checkbox"/> BOTTJER	Eudasia	160901297
<input type="checkbox"/> BOWEN	Rachel Hope	
<input type="checkbox"/> BUCKLEY	William	

Remove Therapist

Add Therapist(s)/Service Provider(s)

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View Unmatched Enrollments

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



The screenshot shows a web application interface with a navigation menu at the top. The menu items are: Home, File Transfer, Activities, eSTACs, Attendance, Billing, Caseload Maintenance, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. Below the menu, the page title is 'Unmatched Enrollments'. There is a 'Retrieve' button. Below the button is a table with the following data:

County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description				
WESTCHESTER	TRAMONTOZZI	LUKE	12/23/13	201718	02/20/18	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



Unmatched Children [Add Child](#)

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

- ❖
- ❖ Or Attempt Child Match from 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

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

Confirm Child Match

- ❖ Click Select to choose the County 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

Enrollment Lookup Report

- ❖ A report of all enrollments
- ❖ Lookup > Enrollment Lookup



- ❖ Choose filters, and click Search

Enrollments

2015 - 2016 Winter ▾ ERIE ▾

HIGHER LEARNING, LLC ▾

CBRS RS SEIT CB

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

Enrollment Lookup Report

- ❖ Can use 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

Enrollments

School Year Session County CBRS

Provider RS SEIT CB

Status	ESID	Last Name	First Name	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	
UnMatched		ALDRICH	PORFIRIO	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Wappingers	RS	ST	9/9/2019	6/26/2020	2x30	I			0.00	0.00	39	41	Attendances
	RS1920W0023200	ALDRICH	PORFIRIO	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Wappingers	RS	ST1	9/9/2019	6/26/2020	3x60	G	9200-2		70.00	0.00	39	41	Attendances
	RS1920W0023296	ARIAS	EARNESTINE	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Poughkeepsie	RS	ST	10/7/2019	6/26/2020	2x30	I	9200-2		60.00	0.00	36	37	Attendances
	RS1920W0023221	AVILES	THERON	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Hyde Park	RS	OT	9/9/2019	6/26/2020	1x30	I	9200-2		60.00	0.00	39	41	Attendances
	RS1920W0023222	AVILES	THERON	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Hyde Park	RS	PT	9/9/2019	6/26/2020	1x30	I	9200-2		60.00	0.00	39	41	Attendances
	RS1920W0023280	AVILES	THERON	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Hyde Park	RS	ST	9/9/2019	10/16/2019	2x30	I	9200-2		60.00	0.00	6	5	Attendances
	RS1920W0023238	BERGMAN	JOSEF	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Rhinebeck	RS	PT	9/9/2019	6/26/2020	2x30	I	9200-2		60.00	0.00	39	41	Attendances
	RS1920W0023224	BIGGS	BORIS	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Wappingers	RS	ST1	9/9/2019	6/26/2020	3x60	G	9200-2		70.00	0.00	39	41	Attendances
	RS1920W0023208	BOYER	BILLY	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Wappingers	RS	ST1	9/9/2019	6/26/2020	3x60	G	9200-2		70.00	0.00	39	41	Attendances

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 | Search

HIGHER LEARNING, LLC | RS | SEIT | CB

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

Enrollment Assignments Report

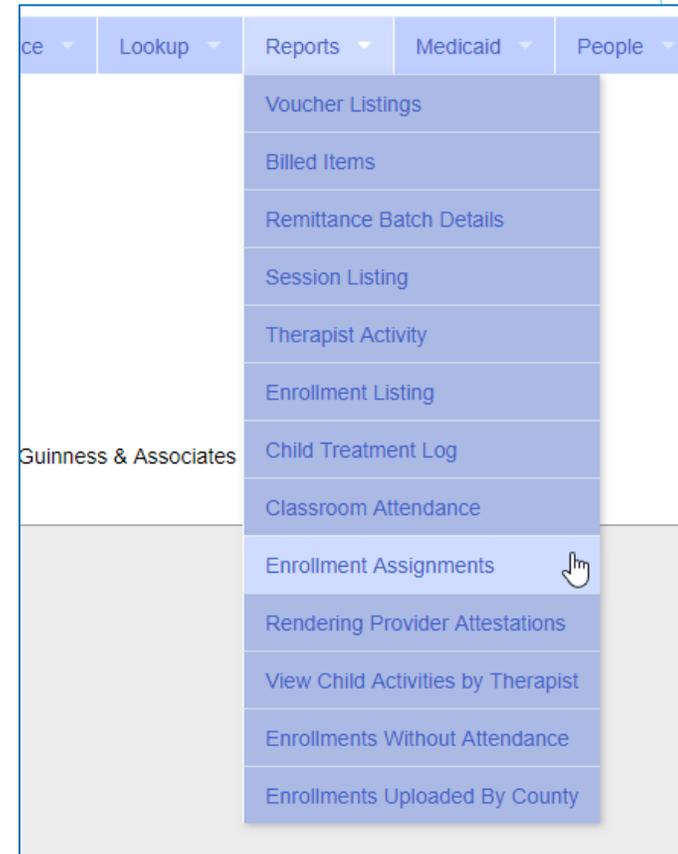
- ❖ Easy way to access child enrollment information
- ❖ Can also assign or remove therapists from assignment
- ❖ Reports > Enrollment Assignments
- ❖ Search by School Year or Provider and click Retrieve

Enrollment Assignments

Filters

School Year: Provider:

Missing Assignments Only



Enrollment Assignments Report

❖ Find the child you need and click “Edit Assignment”

❖ Select the enrollment

❖ Add or Remove therapists as needed

Enrollment Assignments

Filters

School Year: Provider: Missing Assignments Only

Last Name	First Name	Electronic Service ID	Related Service Code	Provider	County	District	Therapist Last Name	Therapist First Name	Frequency	Individual Or Group	Edit Assignment
			ST		SCHENECTADY	Burnt Hills- Ballston Lake			6x30		Edit Assignment
			PLA		Albany	ALBANY CITY SD			1x30	I	Edit Assignment
			ST		Albany	ALBANY CITY SD			1x30	I	Edit Assignment
			PSY		Albany	ALBANY CITY SD			2x30	G	Edit Assignment
			ST		Albany	ALBANY CITY SD			1x30	G	Edit Assignment
			ST		Albany	North Colonie 0809			1x30	G	Edit Assignment

https://training.cpseportal.com/Attendance/Assign_Child_Therapists_and_Service_Providers.aspx

Select a Child
ALLOCCA, Isabella County: Albany District: ALBANY CITY SD DOB: 1/27/2007

Select an Enrollment

Select	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

Assigned Therapists

Last Name	First Name	NPI
<input type="checkbox"/>	ADONRI Cordelle	1326290289
<input type="checkbox"/>	ALFARO Oluwafolakeemi Adebosipo	1497907504

Remove Therapist

Available Therapists

Last Name	First Name	NPI
<input checked="" type="checkbox"/>	AFONSO Yaurdin	176074476
<input type="checkbox"/>	AMALFITANO Mechel	128588857
<input type="checkbox"/>	ARISTILDE Mayana	
<input type="checkbox"/>	AUER Lydia Nicole	
<input type="checkbox"/>	BARKET Leisha	157881310
<input type="checkbox"/>	BARKOFF Ean	179003880
<input type="checkbox"/>	BENCAL Cheikhouna	
<input type="checkbox"/>	BHASIN Daniel David	197285941
<input type="checkbox"/>	BODNER Wakuv	147779985
<input type="checkbox"/>	BOTTJER Eudasia	160901297
<input type="checkbox"/>	BOWEN Rachel Hope	
<input type="checkbox"/>	BUCKLEY William	

Add Therapist(s)/Service Provider(s)

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Important Note:

- ❖ If you do not match your enrollments, you cannot bill for those services

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>
 - ❖ **Assigning Children to Therapist(s)/Service Provider(s) (including teachers):**
 - ❖ <http://support.cpseportal.com/kb/a34/assign-children-to-therapist.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

Upcoming Webinars

- ▶ Case Management (Independent Providers)

- ▶ 6/14 @ 11:00 am

- ▶ Registration Link:

- <https://attendee.gotowebinar.com/register/3094714430039910924>

- ▶ 6/16 @ 3:00 pm

- ▶ Registration Link:

- <https://attendee.gotowebinar.com/register/8012755174292203278>

- ▶ Case Management (Agency Service Providers)

- ▶ 6/21 @ 11:00 am

- ▶ Registration Link:

- <https://attendee.gotowebinar.com/register/7116953364329283086>