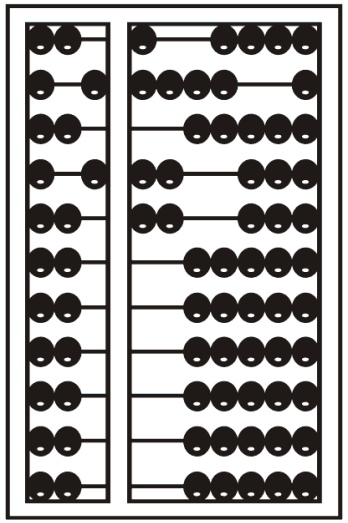
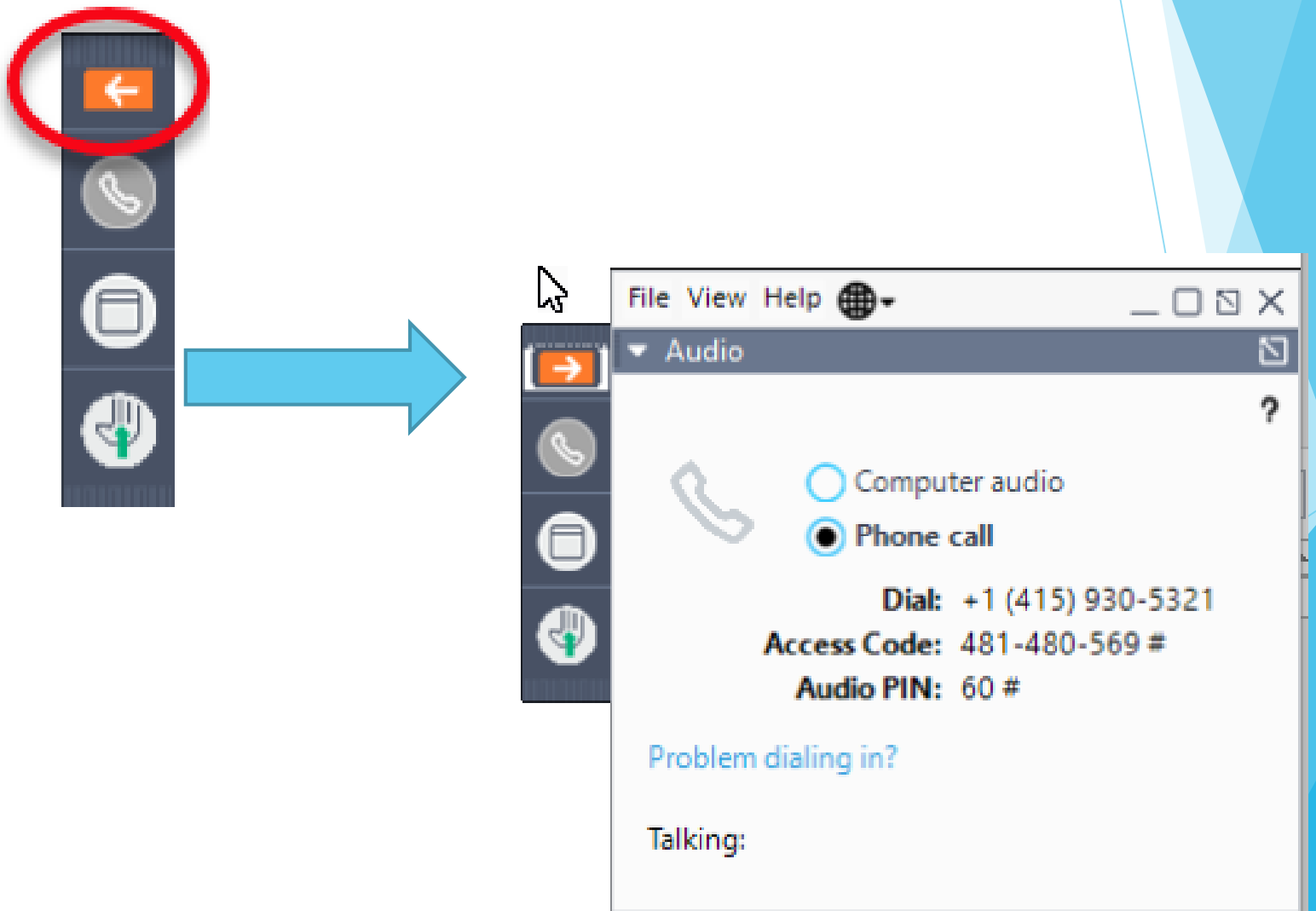
JAMES McGUINNESS & ASSOCIATES INC.
Consultants



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

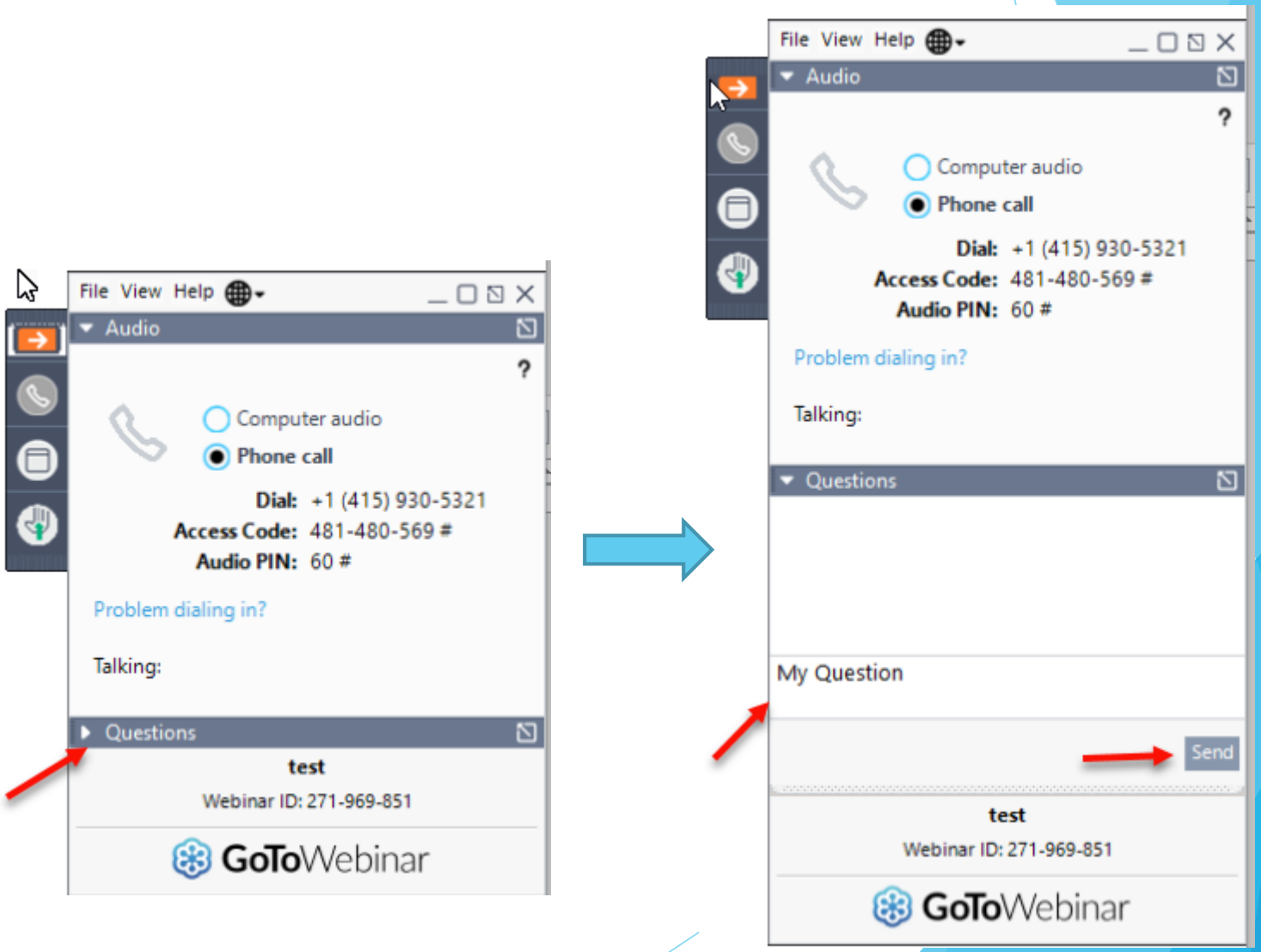


Communicating with Presenter

- 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

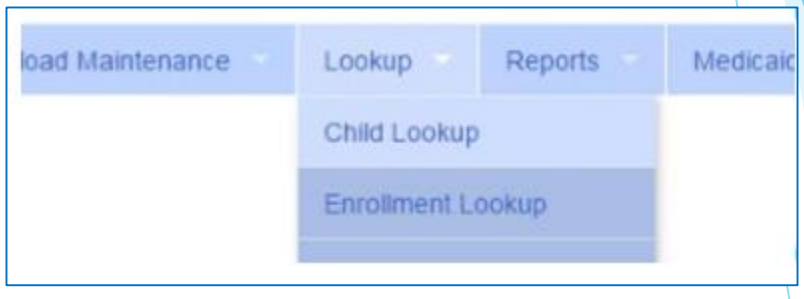
For Agencies

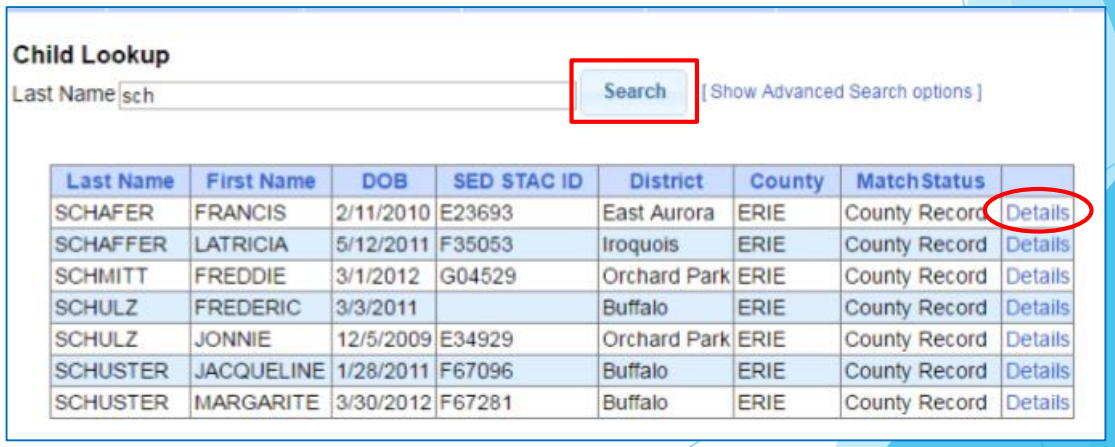
Topics Covered

- 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.



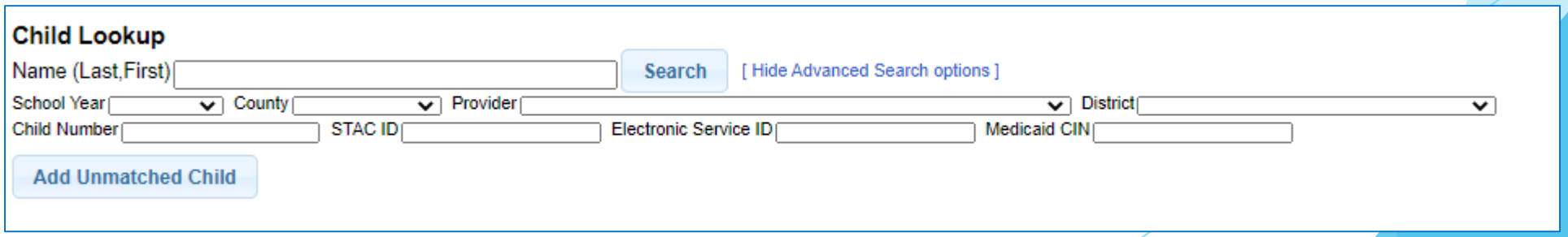


Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	
SCHAFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	Details
SCHAFFER	LATRICIA	5/12/2011	F35053	Iroquois	ERIE	County Record	Details
SCHMITT	FREDDIE	3/1/2012	G04529	Orchard Park	ERIE	County Record	Details
SCHULZ	FREDERIC	3/3/2011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

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

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

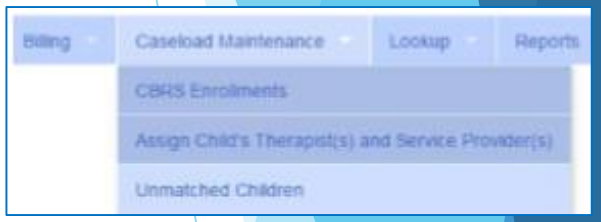


Unmatched Children & Enrollments

- 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



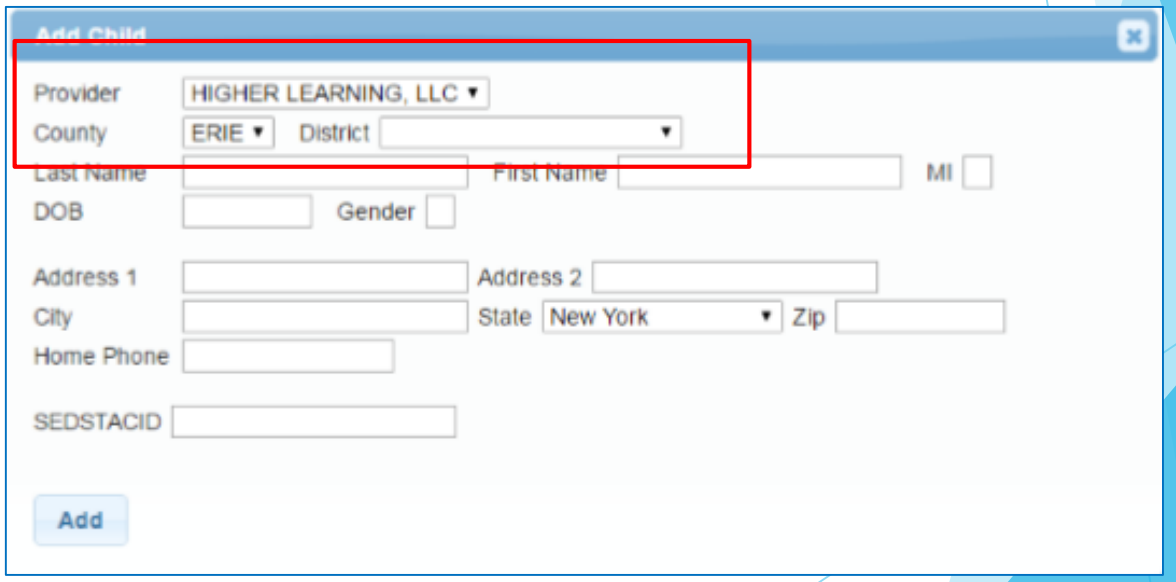
- Click “Add Child” to add an Unmatched Child

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



Editing an Unmatched Child

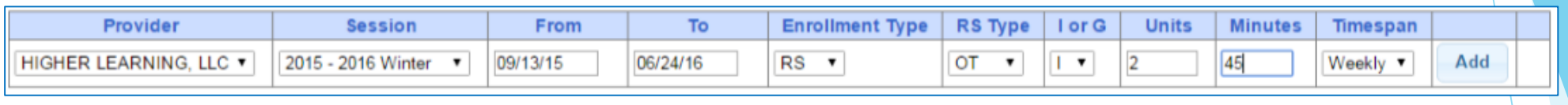
- Click on “Edit” next to the child you would like to edit

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

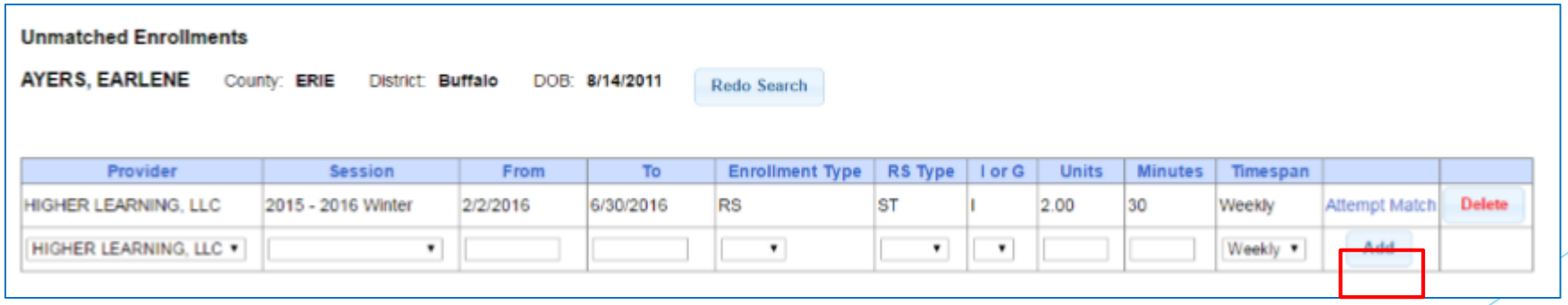
Adding Enrollments from Unmatched Children

- 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

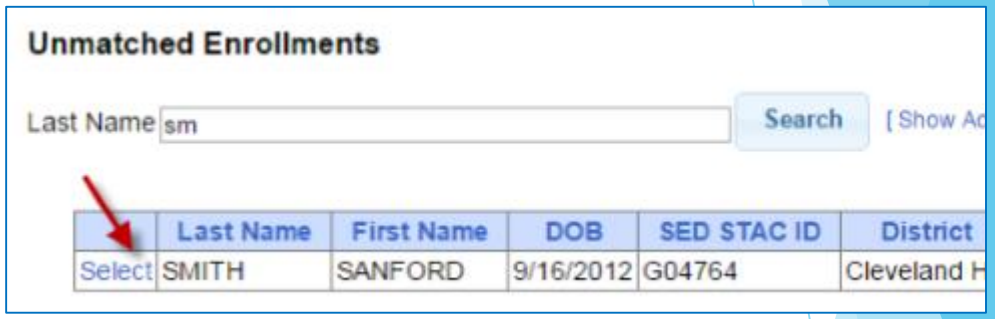
Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan		
HIGHER LEARNING, LLC	2015 - 2016 Winter	2/2/2016	6/30/2016	RS	ST	I	2.00	30	Weekly	Attempt Match	Delete
HIGHER LEARNING, LLC									Weekly	Add	

Adding an Unmatched Enrollment

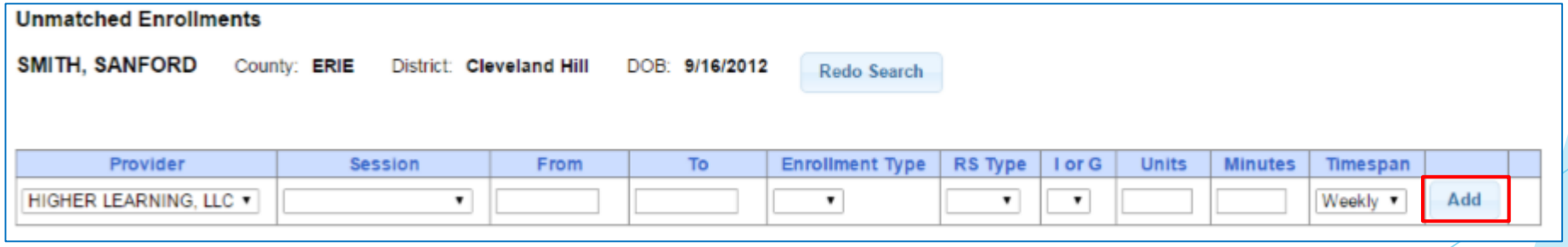
- You can add an Unmatched Enrollment to either a County created child or an unmatched child (created by the provider)
- For an Unmatched Child you can use either Unmatched Children page or Add/Edit Unmatched Enrollments page
- For a County-created Child, you need to use Add/Edit Unmatched Enrollments

Adding Enrollments from Add/Edit Unmatched Enrollments

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

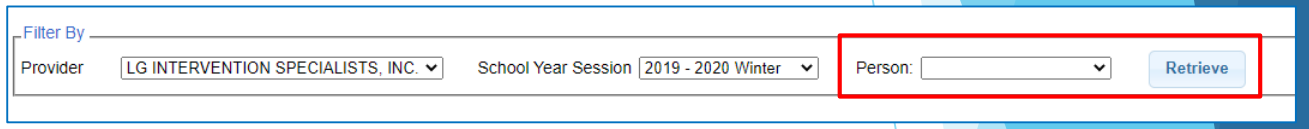


- Enter your data on a blank row and click “Add”

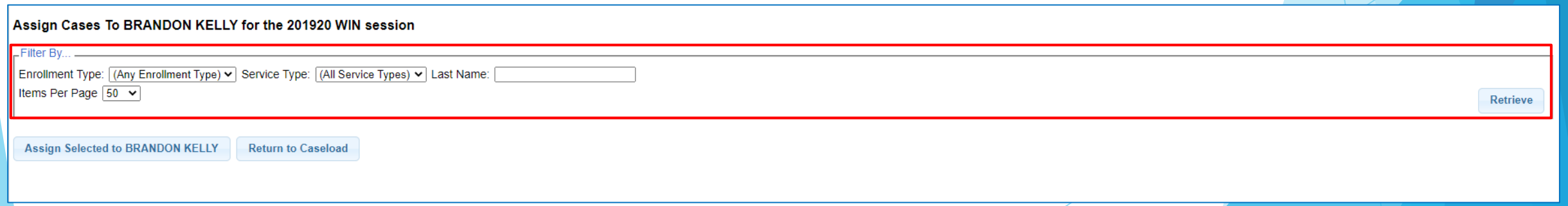


Assigning Enrollments to Therapist

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

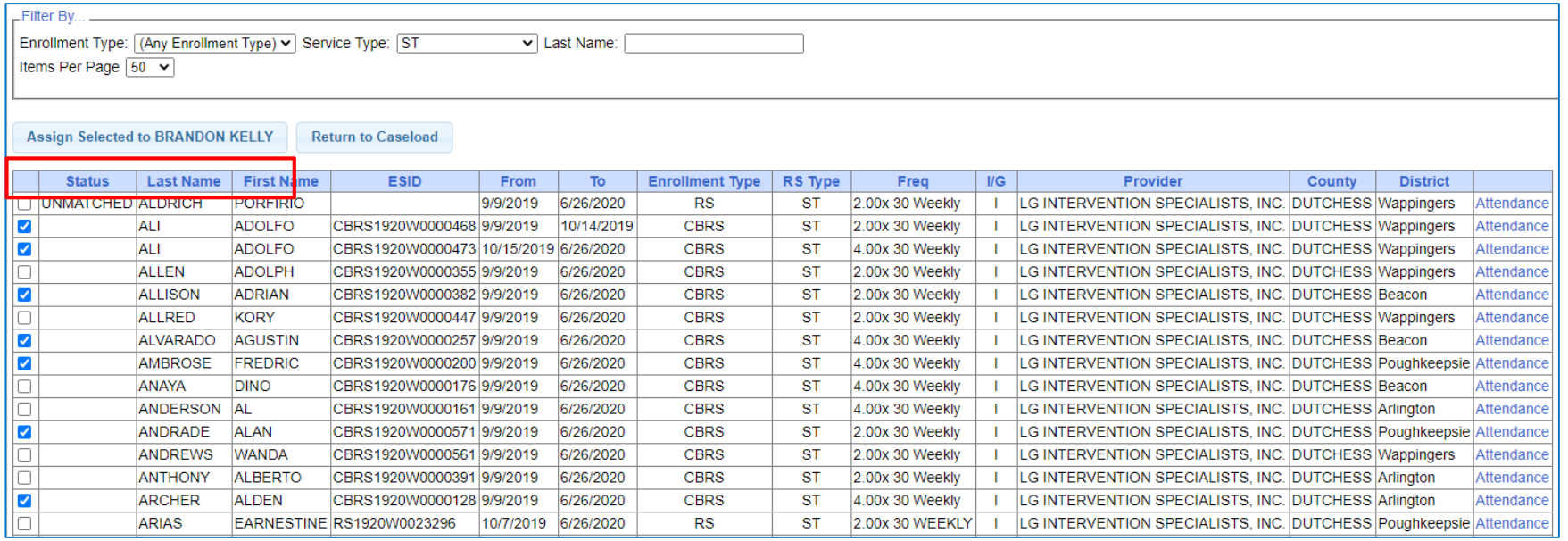


- Filter by Enrollment type, Service type, or Last Name and click “Retrieve” to bring up any enrollments that fit the description



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

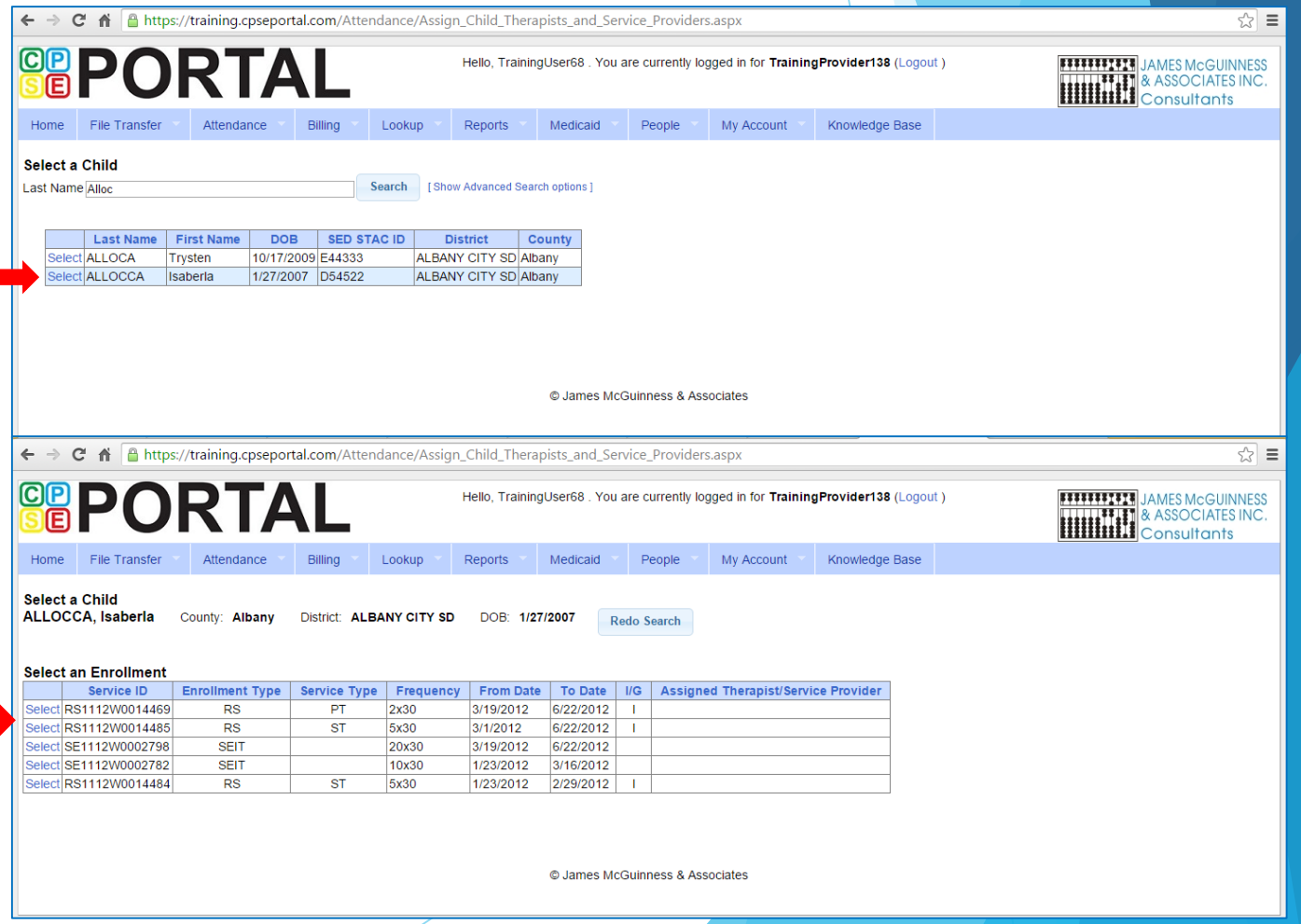
Assign Selected to BRANDON KELLY | Return to Caseload

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

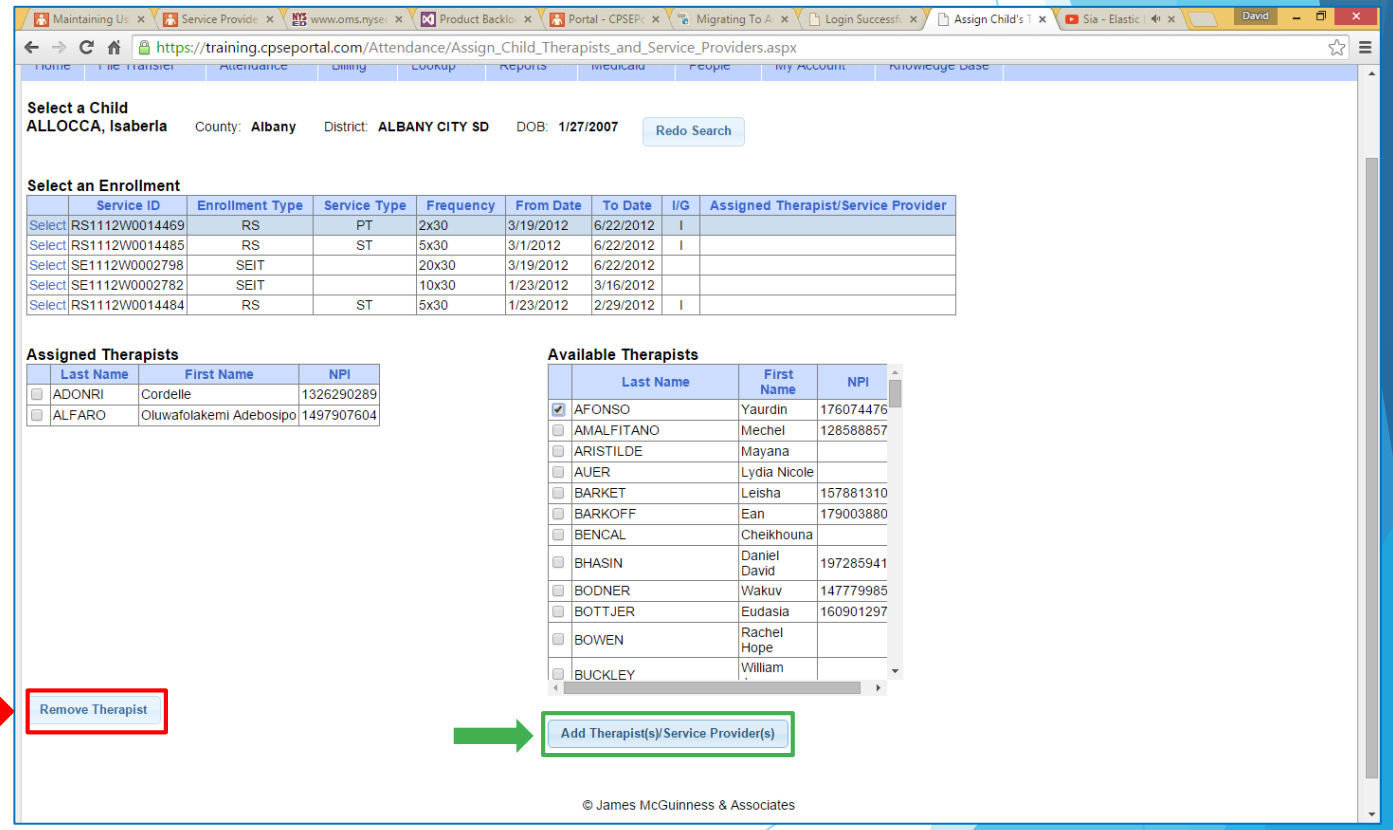
Assigning Therapists to Children For CBRS/RS

- 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



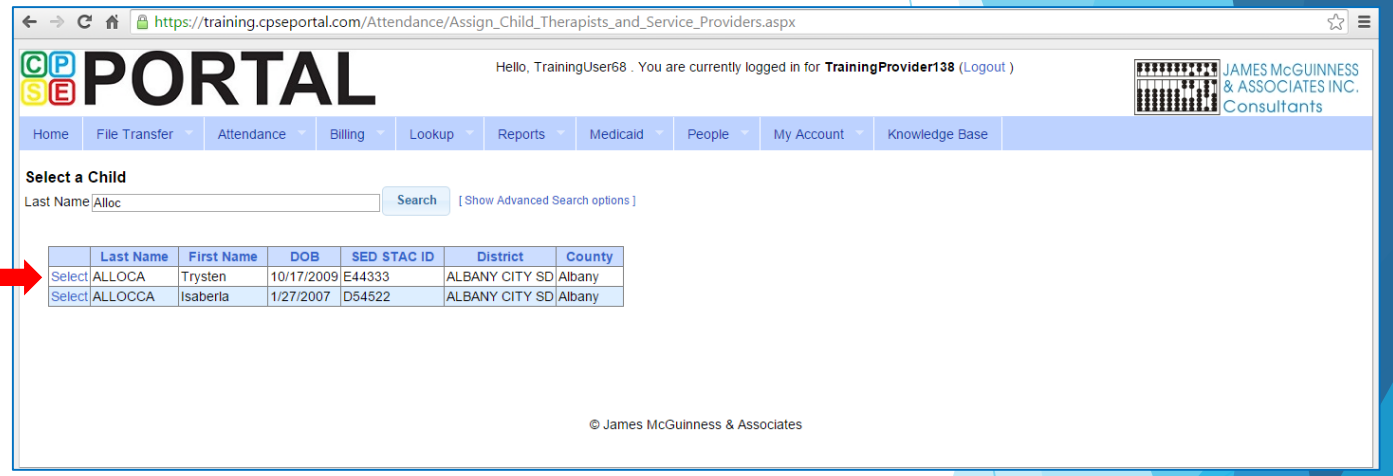
Assigning Therapists to Children For CBRS/RS

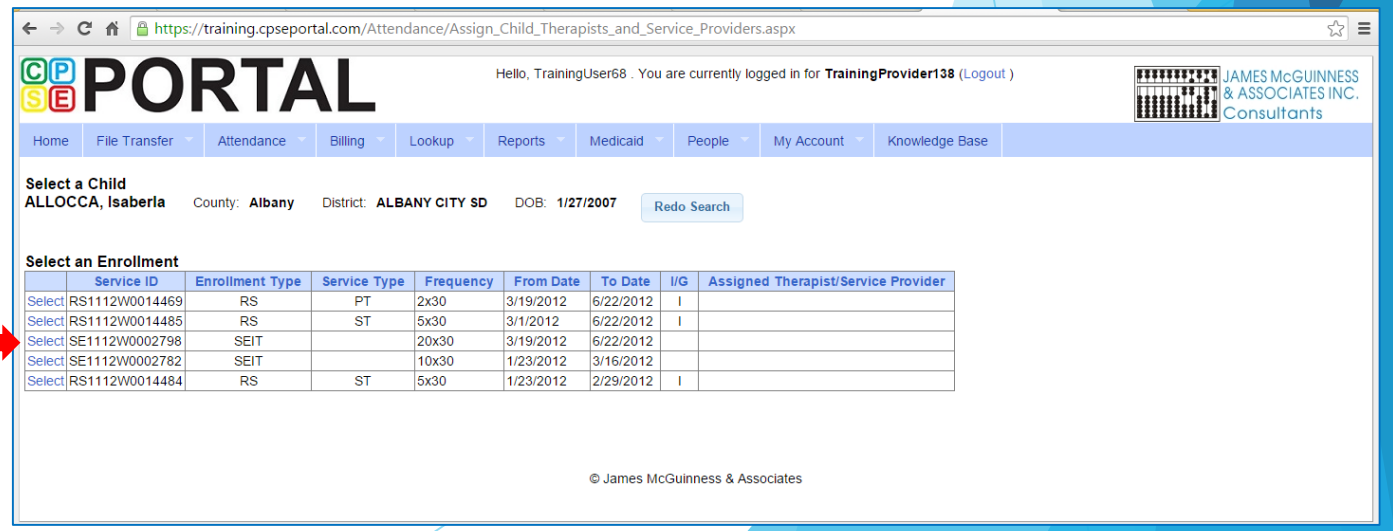
- Select a therapist from the **Available Therapists** section
- Click “Add Therapist(s)/Service Provider(s)”
- To remove assigned therapists, select the therapist from the **Assigned Therapists** section and click “Remove Therapist”



Assigning SEIT Teacher to Children

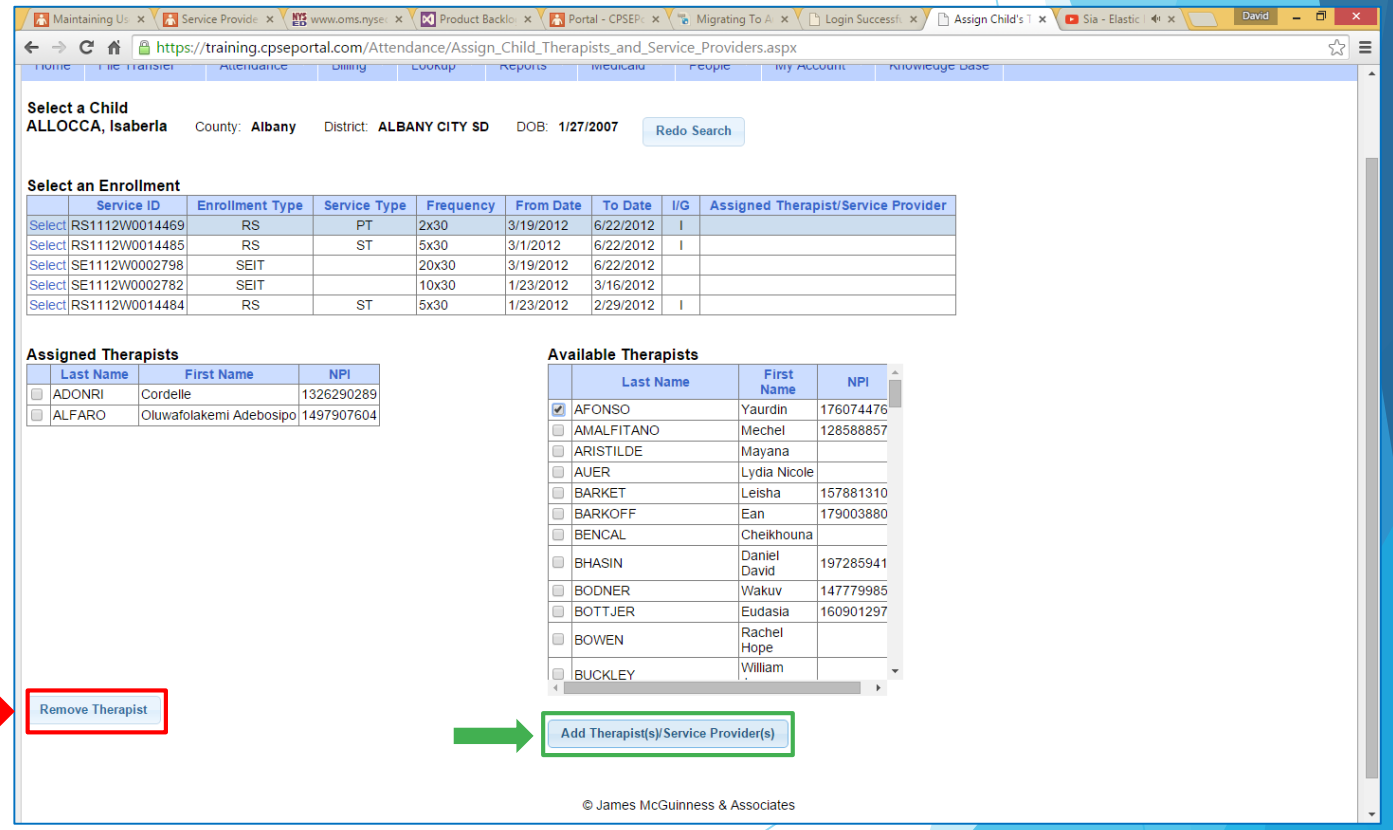
- Caseload Maintenance > Assign Child's Therapist(s) and Service Provider(s)
- Search for a child and select the child you are working on
- Select the SEIT enrollment





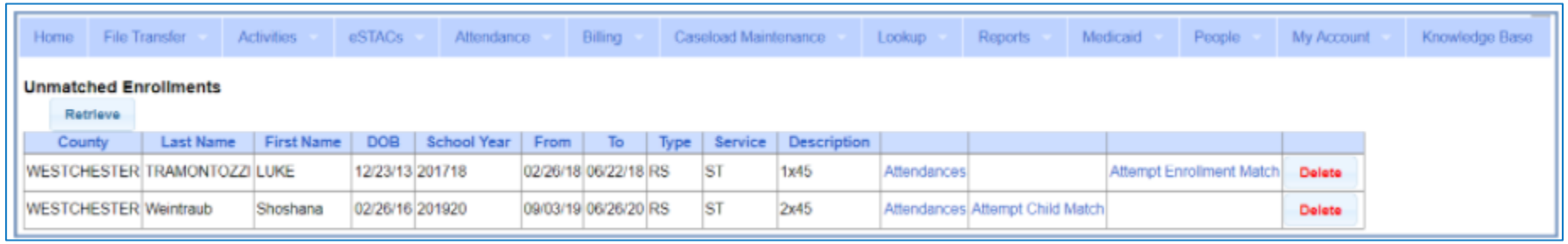
Assigning SEIT Teacher To Children

- 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”



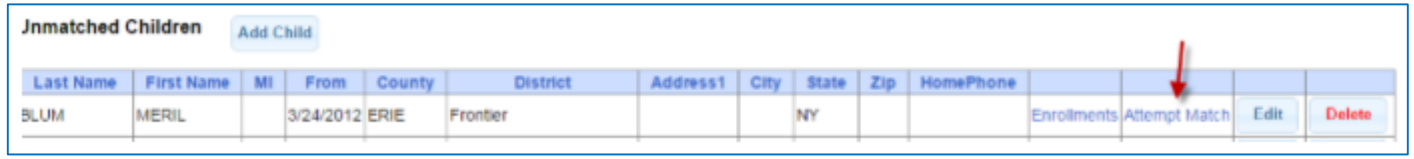
View Unmatched Enrollments

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



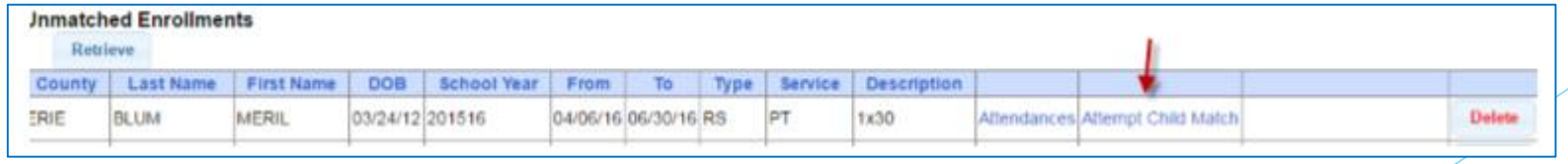
Matching Children

- **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

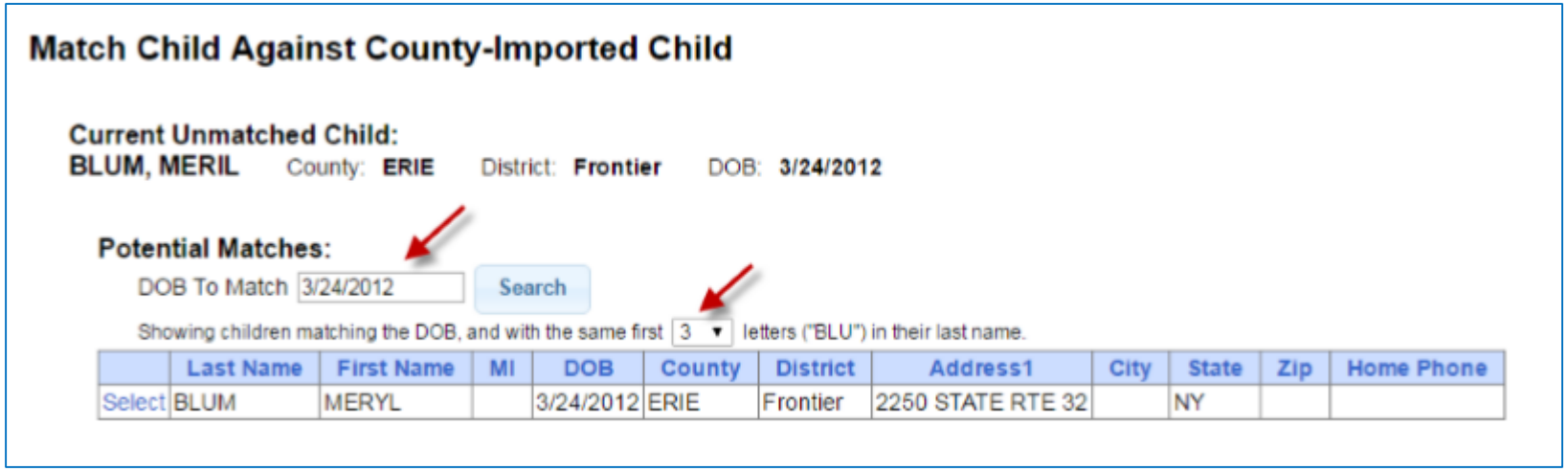


-

- Or Attempt Child Match from View Unmatched Enrollments



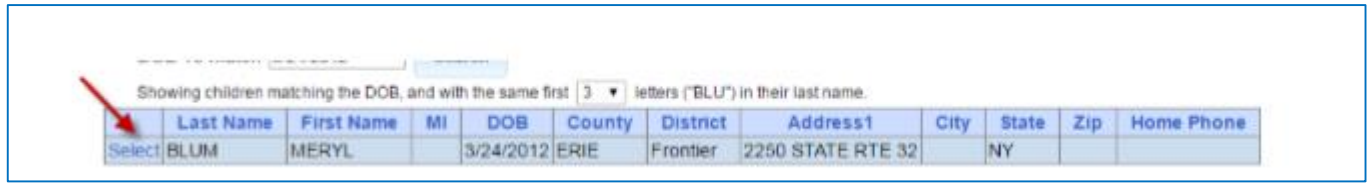
Matching Children

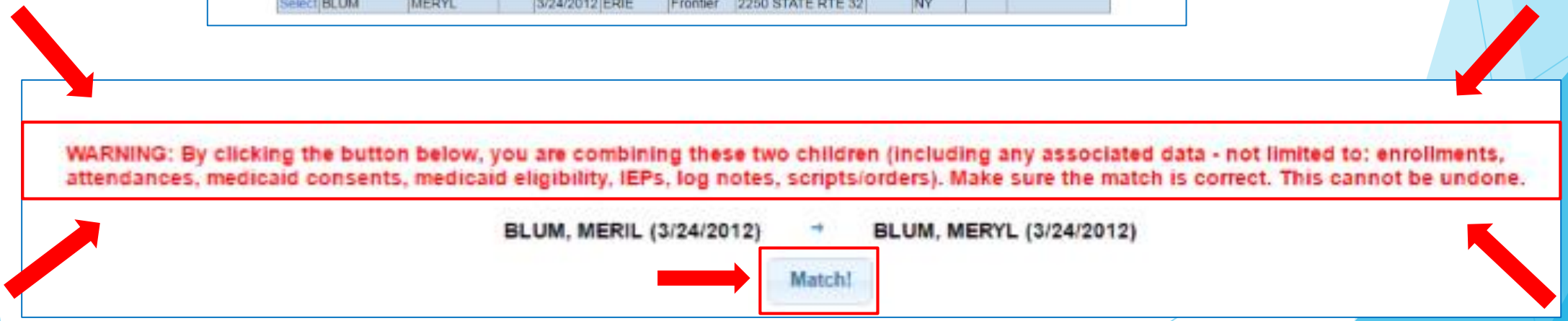


- The top of the screen will show the information you entered for the child
- The bottom shows the potential matches
- You can alter potential match search criteria for DOB and First ? letters of their last name
- **Make sure the child you are selecting to match is the correct one** and click select

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





Matching Enrollments

- Caseload Maintenance > View Unmatched Enrollments

Unmatched Enrollments

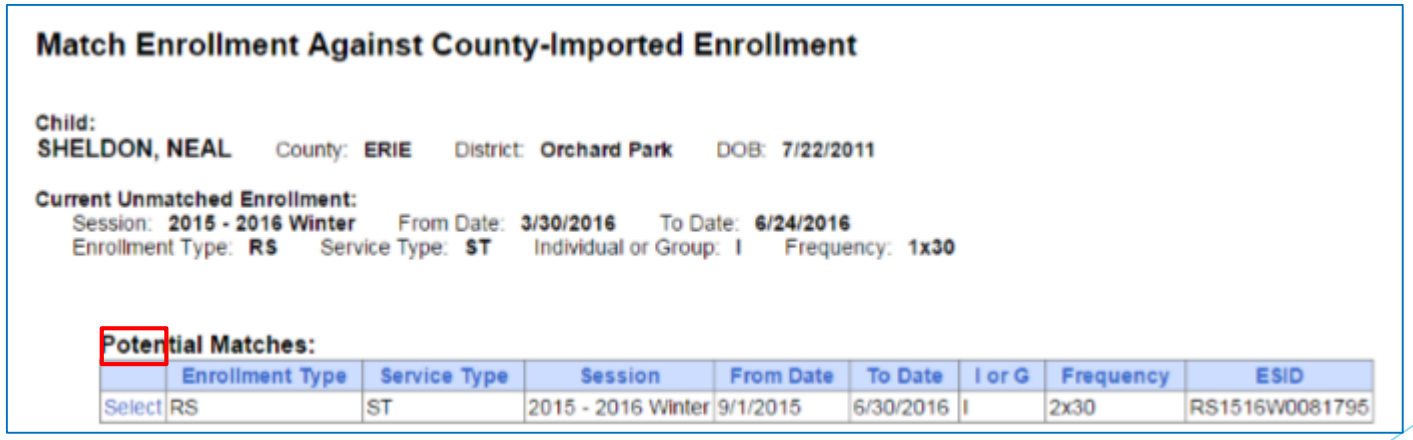
Retrieve

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**

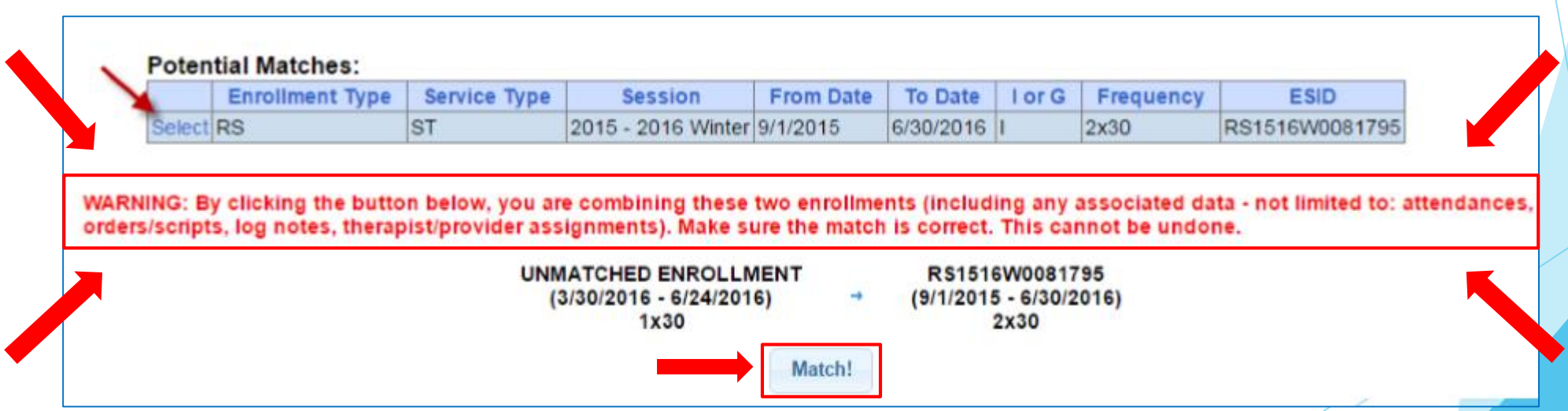
Current Unmatched Enrollment:
Session: **2015 - 2016 Winter** From Date: **3/30/2016** To Date: **6/24/2016**
Enrollment Type: **RS** Service Type: **ST** Individual or Group: **I** Frequency: **1x30**

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

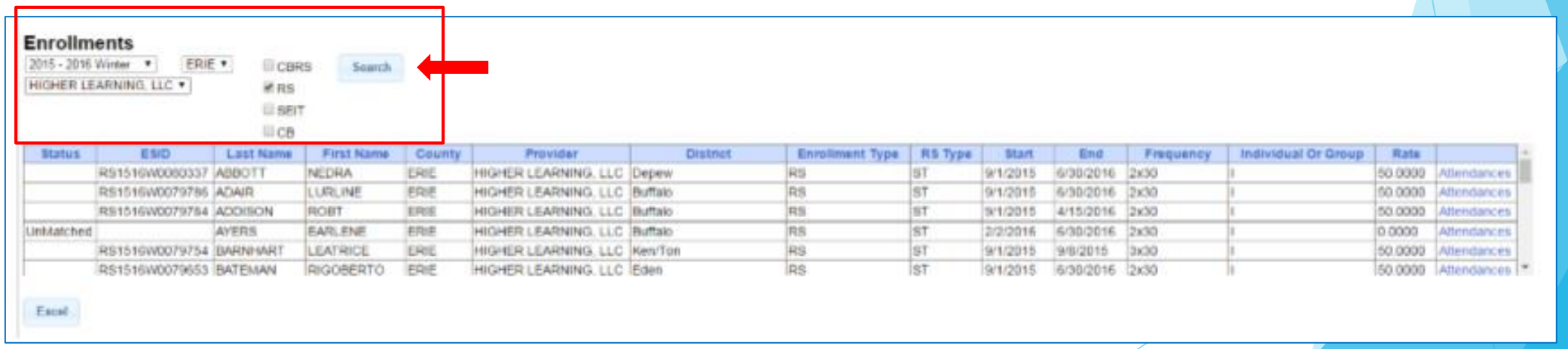
- When you select and enrollment to Match, you will be prompted to confirm the information.
- Double check the information is correct.
- If it is correct, click Match



Enrollment Lookup Report

- A report of all enrollments
- Lookup > Enrollment Lookup

- Choose filters, and click Search



Status	ESID	Last Name	First Name	County	Provider	District	Enrollment Type	RS Type	Start	End	Frequency	Individual Or Group	Rate	
	RS1516W0060337	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: 2019 - 2020 Winter | County: DUTCHESS | Provider: LG INTERVENTION SPECIALISTS, INC.

☐ CBRS ☑ RS ☐ SEIT ☐ CB

Search

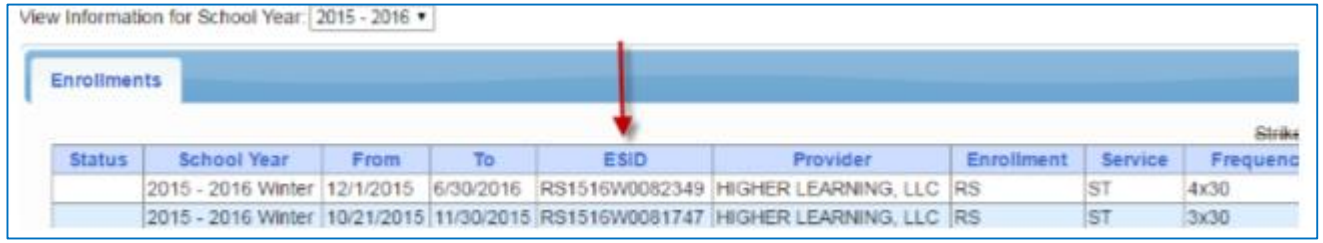
Status	ESID	Last Name	First Name	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	
UnMatched		ALDRICH	PORFIRIO	DUTCHESS	LG INTERVENTION SPECIALISTS, INC.	Wappingers	RS	ST	9/9/2019	6/26/2020	2x30	I			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

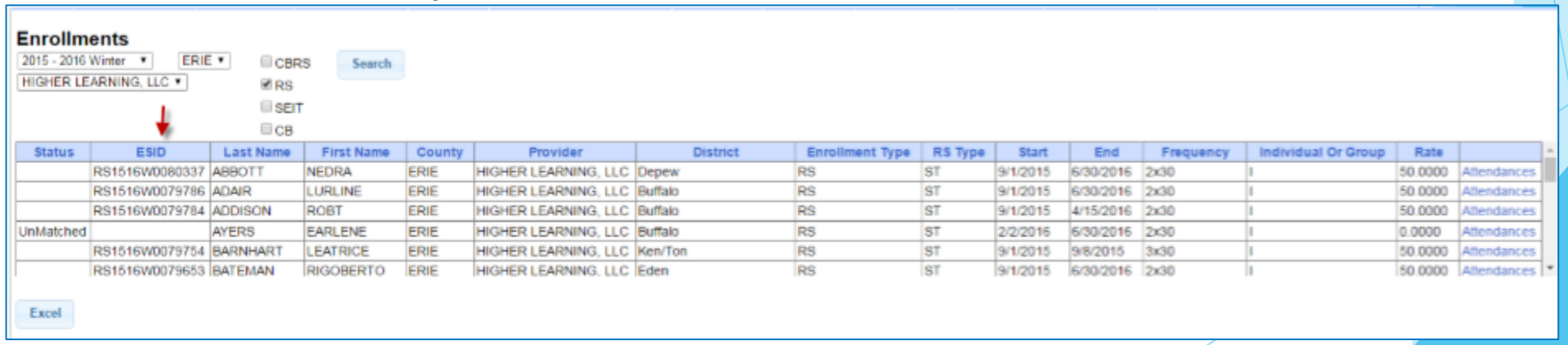
- Use Child Lookup to view enrollments for a child


View Information for School Year: 2015 - 2016

Enrollments

Status	School Year	From	To	ESID	Provider	Enrollment	Service	Frequenc
	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 | HIGHER LEARNING, LLC | CBRS | RS | SEIT | CB | Search

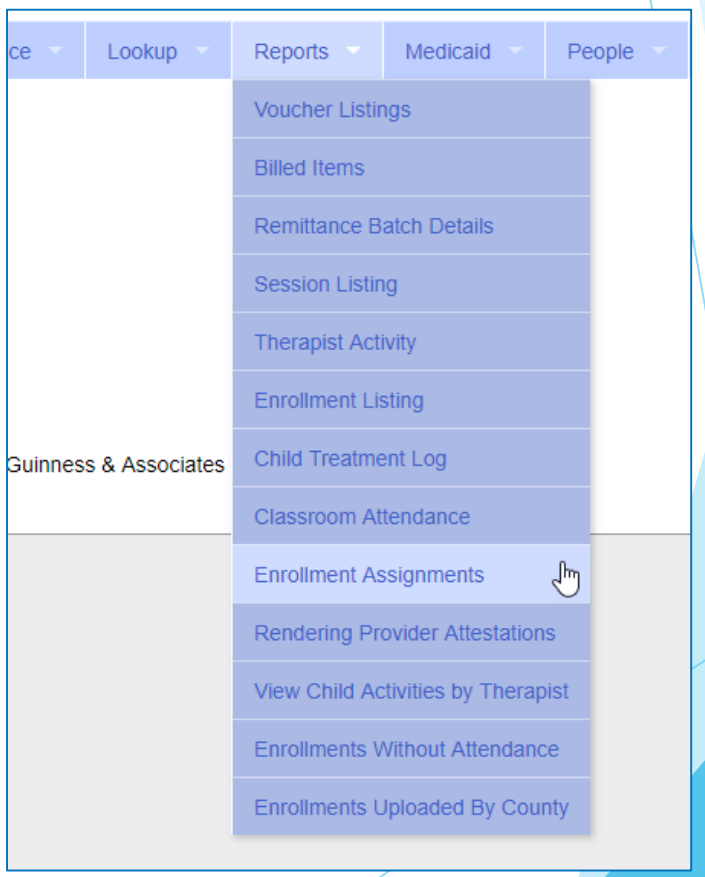
Status	ESID	Last Name	First Name	County	Provider	District	Enrollment Type	RS Type	Start	End	Frequency	Individual Or Group	Rate	
	RS1516W0080337	ABBOTT	NEDRA	ERIE	HIGHER LEARNING, LLC	Depew	RS	ST	9/1/2015	6/30/2016	2x30	I	50.0000	Attendances
	RS1516W0079786	ADAIR	LURLINE	ERIE	HIGHER LEARNING, LLC	Buffalo	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

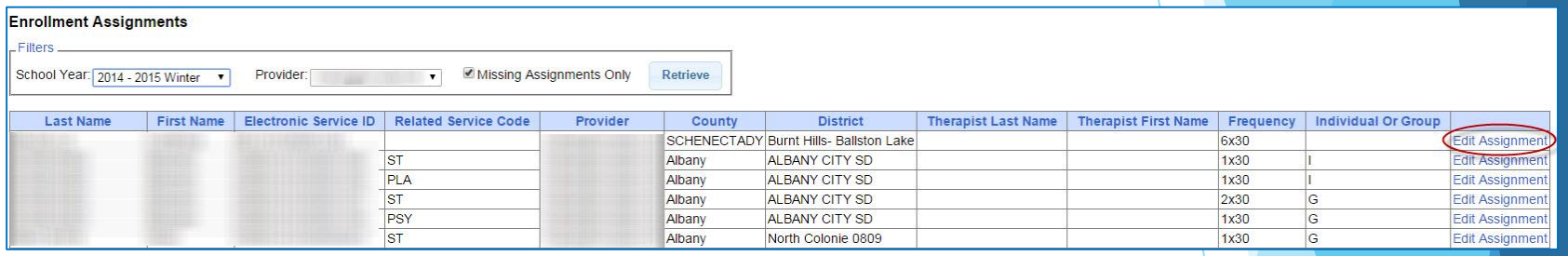
- Easy way to access child enrollment information
- Can also assign or remove therapists from assignment
- Reports > Enrollment Assignments

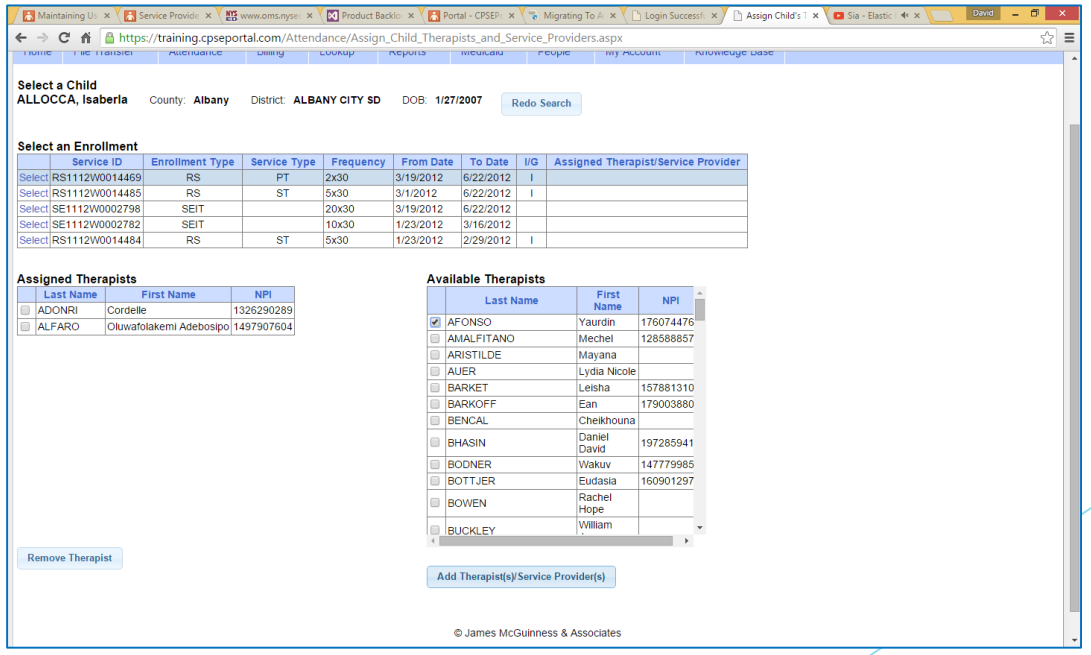
- Search by School Year or Provider and click Retrieve



Enrollment Assignments Report

- Find the child you need and click “Edit Assignment”
- Select the enrollment
- Add or Remove therapists as needed





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