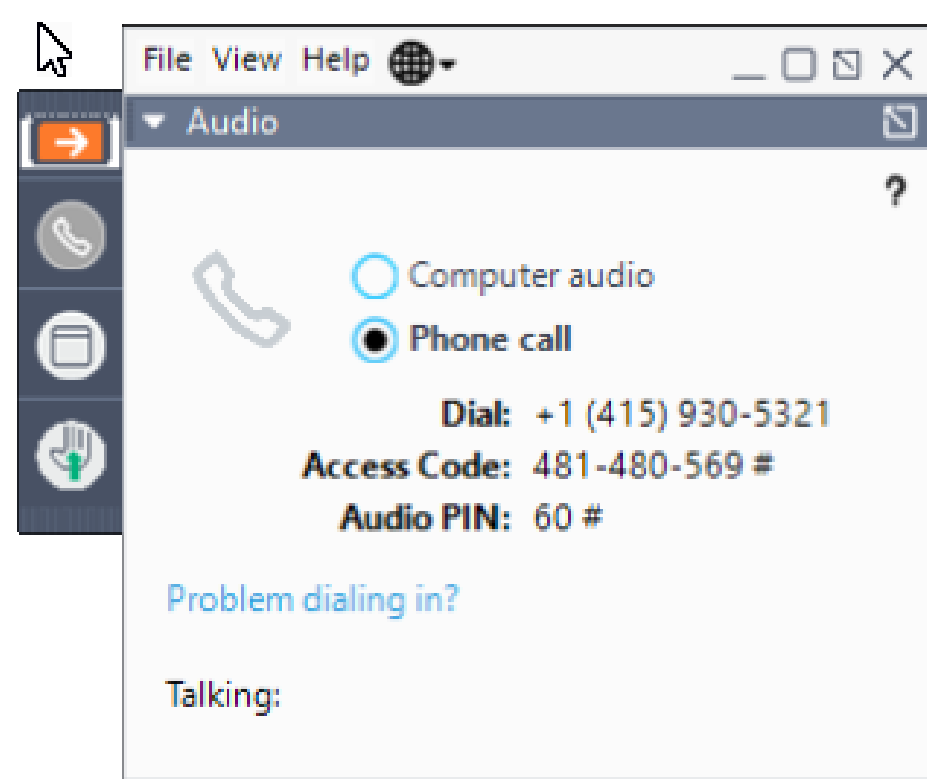


Using Go To Webinar

Go To Webinar Control Panel

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

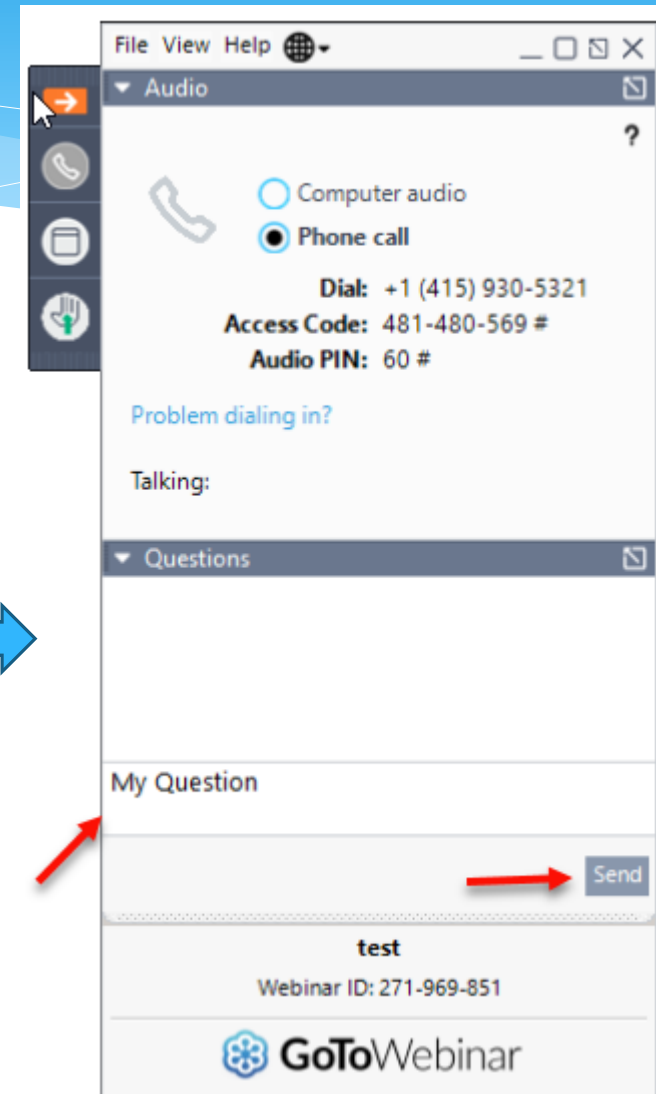
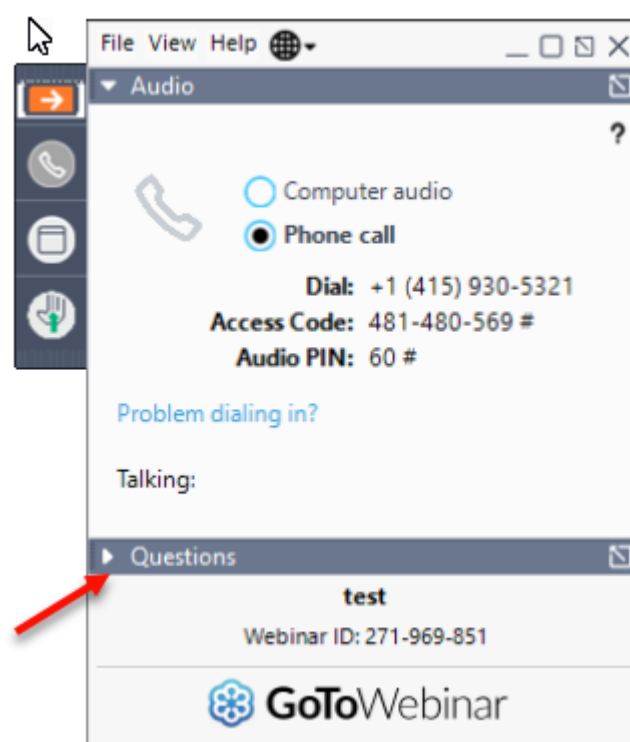


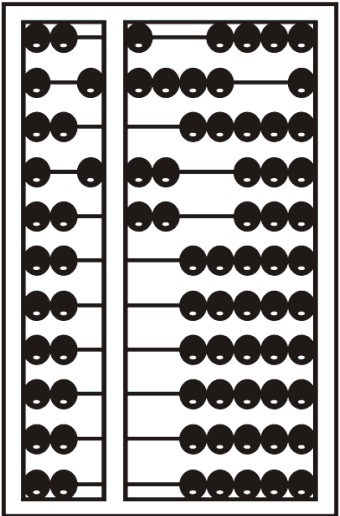
Communicating with Presenter

- * 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





Session Notes

Topics Covered

- * Recap Classroom Attendance/Sign Classroom Attendance – *Slide 8*
- * Attendance Entry/Record – *Slide 14*
 - * Recording Attendance/Treatment Logs
 - * Weekly Attendance Calendar
 - * Attendance Entry Screen
 - * Editing an Existing Attendance
 - * Group Attendance
- * Signing Attendance/Review & Sign – *Slide 34*
- * Un-signing Attendance/Making Corrections After Signed – *Slide 48*
- * View Unsigned Attendances – *Slide 50*

Topics Covered

- * Activity Management – *Slide 51*
 - * Activity Entry
- * View Caseload (for Service Providers) – *Slide 54*
- * Enrollment Lookup (for Agencies & Independent Providers) – *Slide 57*
- * Move Attendances Between Enrollments – *Slide 60*
- * Print Child Treatment Log – *Slide 63*
- * Print Parent Signature Log – *Slide 65*
- * View Child Activities by Therapist Report – *Slide 67*

Recap of Classroom Attendance

- * For children in a center based classroom program their presence is recorded as present or not.
 - * There is no distinction between why they were not present.
 - * No additional information is entered (times, activities, progress, etc.).
- * However, their services Center Based Related Services (OT, PT, etc.) are recorded with detailed entries.

Entering Classroom Attendance

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

Filter Classrooms

Session: 2019 - 2020 Winter

Program:

Active During (Select Month & Year):

Apply Filter

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

- * 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.

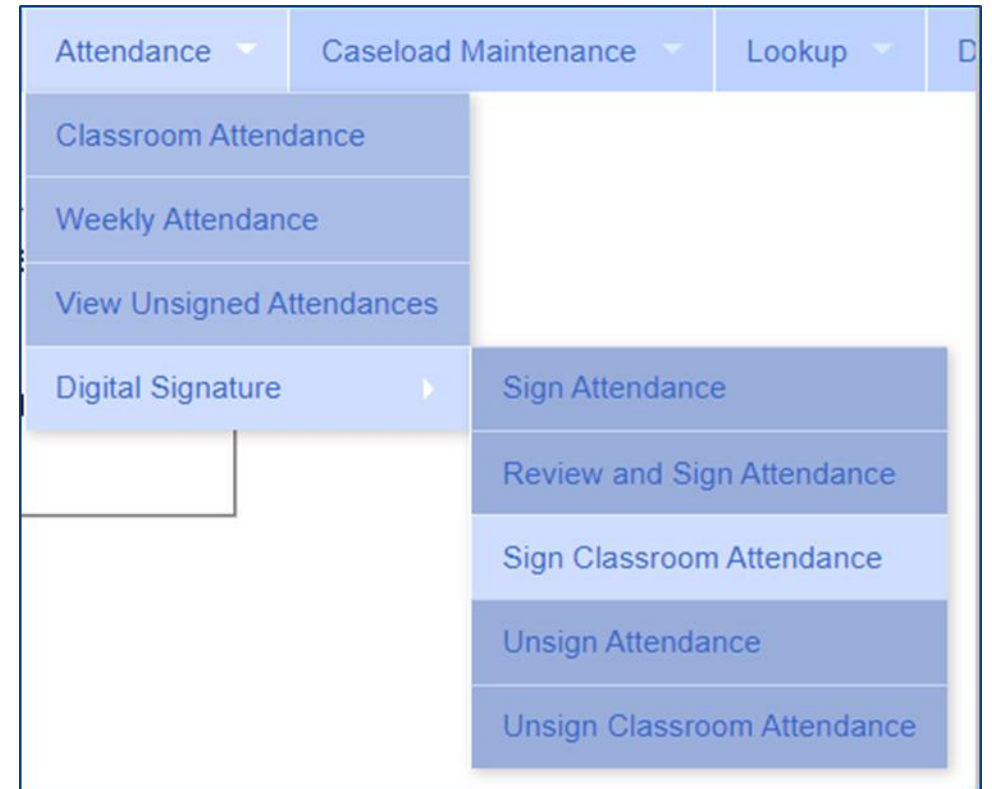
Tue ☑	Wed ☑	Thu ☑	Fri ☑
05/26/20	05/27/20	05/28/20	05/29/20

Total Sessions:

40

Signing Classroom Attendance

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



Signing Classroom Attendance

- * This screen shows the attendance you need to review/edit/sign for.
- * You can filter by a classroom, month, the county and provider.
- * Once you have selected your filter, hit “Retrieve”.

[illegible]

Signing Classroom Attendance

- * Teachers can delete attendances but you cannot add them on this screen before you sign your attendances.
- * First, select the attendances you wish to sign for by clicking the box next to each name.
- * Once you have reviewed/edited your attendance, click on “Sign Attendance”
- * Read the agreement, enter your pin and click “I agree.”

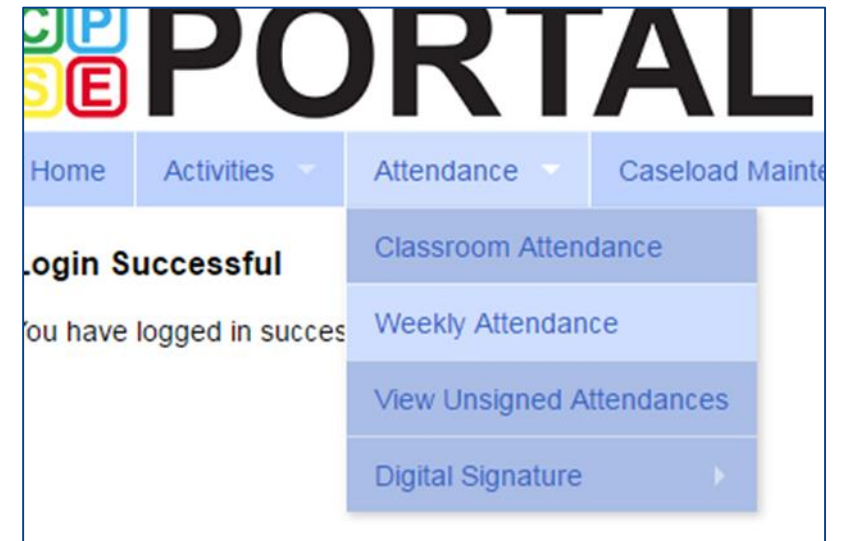
[illegible]

Attendance Entry/Record

- * For SEIT, fee for related services or related services as part of a center based classroom tuition program, the Attendance Entry or Attendance Record contains:
 - * Child
 - * Service Type
 - * Individual vs. Group
 - * Date of Service
 - * Time In/Time Out
 - * Setting
 - * Location
 - * ICD 10 Codes
 - * CPT Codes
 - * Notes
 - * Notes are also referred to as session notes, treatment notes or treatment logs.

Recording Attendance/Treatment Logs

- * Used for all services including:
 - * SEIT / SEIS
 - * Fee for service related services (OT, PT, etc)
 - * Related Services that are included on the IEP for a child in a center based classroom program (OT, PT, etc.)
- * Go to Attendance > Weekly Attendance



Weekly Attendance Calendar

- * The drop down in the upper left (yellow highlight) shows the current therapist.
- * You can change weeks by changing the “Jump to:” date or using the navigation buttons (red arrows).
- * The calendar displays the attendance entries for the current therapist.
- * To add a new entry, click the time slot corresponding to when the session was provided, and this will bring up the Attendance Entry Screen.

Weekly Attendance

CUELLAR, CECILA - SLP Jump To: 05/08/16 Save

<< today >>

May 08, 2016 - May 14, 2016

	Sunday May 08, 2016	Monday May 09, 2016	Tuesday May 10, 2016	Wednesday May 11, 2016	Thursday May 12, 2016	Friday May 13, 2016
8AM						
9AM				09:15 am to 09:45 am JOSEFA LEVINE	09:00 am to 09:30 am MAGDALENA DELONG	
10AM				10:15 am to 10:45 am MAGDALENA DELONG	10:10 am to 10:40 am TRACEY FELICIANO	
11AM			11:00 am to 11:30 am BRAIN LEVY		10:45 am to 11:15 am TRACY CRAIN	
12PM			12:00 pm to 12:30 pm TRENT MCCORMACK		11:45 am to 12:15 pm BRAIN LEVY	
1PM			01:00 pm to 01:30 pm MAGDALENA DELONG		12:50 pm to 01:20 pm RENE ORTEGA	

Attendance Entry Screen

- * This screen has fields for:
 - * Time In / Time Out
 - * Setting / Location
 - * # of sessions to bill (should be 1 for most related services) SEIT may be in increments of 30 or 60 minute sessions (per IEP) (I.E. – 2x30 or 1x60)
 - * Child (enrollment)
 - * Entry Type
 - * ICD Codes
 - * CPT Codes
 - * Progress indicator
 - * Notes

New Session for May 18, 2021

Time In: 09:00 AM Time Out: 09:30 AM Setting: Not Selected

Bill this session as: 1 x minute session(s)

☐ Co-Visit with Supervisor Location:

[Child 1]

Child: Not Selected

Entry Type:

♥ Diagnosis Code(s): Search by code or description...

CPT Codes: [Lookup]	Units:
♥	
♥	
♥	
♥	
♥	

☐ Does Not Meet Medicaid Requirements

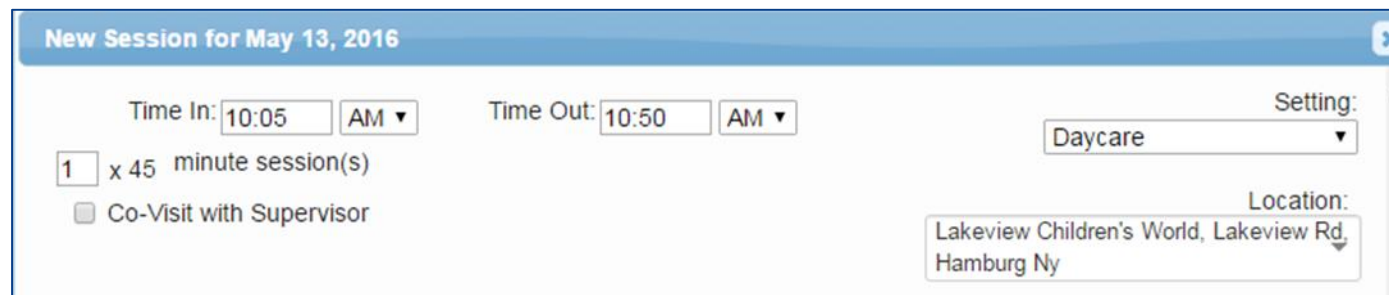
Progress: ☐ No Progress ☐ Limited Progress ☐ Progress

Session Notes:

save cancel

Attendance Entry – Time & Location

- * You can modify the Time In / Time Out to match exact times.
- * Choose the setting that most closely matches the setting where the service was provided.
- * Provide a description of the location.



The screenshot shows a web form titled "New Session for May 13, 2016". It contains the following fields and options:

- Time In:** 10:05 AM (dropdown)
- Time Out:** 10:50 AM (dropdown)
- Setting:** Daycare (dropdown)
- Location:** Lakeview Children's World, Lakeview Rd, Hamburg Ny (text input)
- Session Count:** 1 x 45 minute session(s) (text input)
- Co-Visit with Supervisor:** ☐ (checkbox)

Attendance Entry - # of Sessions

- * Enter the # of sessions/units to submit to the County.
- * In top example, this entry would be for 1-45 minute session.
- * In bottom example, this would represent a 1 hour SEIT session that would be submitted as 2-30 minute sessions (this will always match the IEP)

New Session for May 13, 2016

Time In: 10:05 AM Time Out: 10:50 AM

1 x 45 minute session(s)

☐ Co-visit with Supervisor

New Session for May 11, 2016

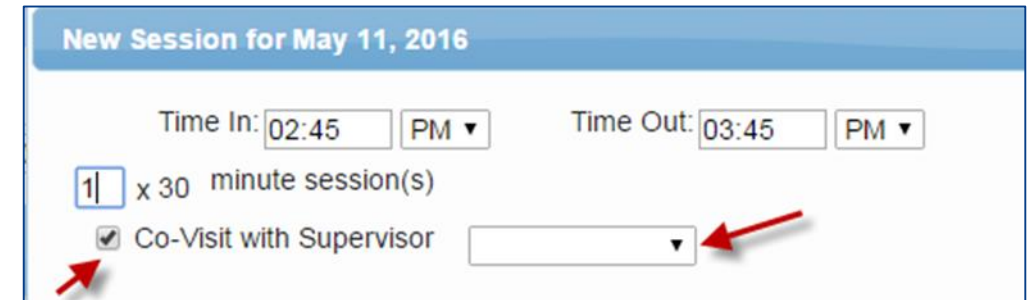
Time In: 02:45 PM Time Out: 03:45 PM

2 x 30 minute session(s)

☐ Co-visit with Supervisor

Attendance Entry - CoVisit

- * This is for UDO/USO entries where the Supervisor is doing a co-visit with the COTA, PTA, CFY, etc.
- * This is **not** for indicating a co-visit with a different discipline.
- * When the check box is marked, a drop down of supervisors will appear to allow the user to specify who the co-visit was with.



The screenshot shows a web form titled "New Session for May 11, 2016". It includes fields for "Time In" (02:45 PM) and "Time Out" (03:45 PM). Below these is a field for "1 x 30 minute session(s)". A checkbox labeled "Co-Visit with Supervisor" is checked. To the right of the checkbox is a dropdown menu. Two red arrows point to the checkbox and the dropdown menu.

New Session for May 11, 2016	
Time In:	02:45 PM
Time Out:	03:45 PM
1 x 30 minute session(s)	
<input checked="" type="checkbox"/> Co-Visit with Supervisor	<div></div>

Attendance Entry – Selecting the Child/Enrollment

- * The “Child” list is all enrollments assigned to you.
- * Each enrollment entry lists:
 - * Child’s Name
 - * Frequency
 - * Service Type
 - * Individual vs. Group
 - * Date range
- * Select the appropriate one
- * **Warning!** Be careful when selecting if there are multiple lines for a child when:
 - * You provide both therapy and service coordination.
 - * They have both individual and group enrollments.

New Session for May 11, 2016

Time In: 02:45 PM Time Out: 03:45 PM

1 x 30 minute session(s)

☒ Co-Visit with Supervisor

[FELICIANO, TRACEY]

Child:

FELICIANO, TRACEY 3x30 - ST - I 12/01/15 - 06/30/16

Not Selected

ASH, SON 2x45 - OT - I 12/01/15 - 06/24/16

CRAIN, TRACY 3x30 - ST - I 09/01/15 - 06/30/16

DELONG, MAGDALENA 3x30 - ST - I 09/01/15 - 06/30/16

FELICIANO, TRACEY 3x30 - ST - I 12/01/15 - 06/30/16

LEVINE, JOSEFA 2x30 - ST - I 01/04/16 - 06/30/16

LEVY, BRAIN 3x30 - ST - I 12/01/15 - 06/30/16

MCCORMACK, TRENT 2x30 - ST - I 09/01/15 - 06/30/16

ORTEGA, RENE 3x30 - ST - I 02/02/16 - 06/30/16

Attendance Entry – Entry Type

- * This field contains 3 entry types:
 - * Provided Treatment Session
 - * Missed Treatment Session
 - * Make Up Session

[E] Child: 2x30 - ST - 01/19/21 - 06/25/21
Entry Type: **Provided Treatment Session**

[E] Child: 2x30 - ST - 01/19/21 - 06/25/21
Entry Type: **Missed Treatment Session**

[E] Child: 2x30 - ST - 01/19/21 - 06/25/21
Entry Type: **Make Up Session** Make Up for:

Attendance Entry – Missed Treatment Session

- * The Missed Treatment Session is used when the child or the service provider is absent.
- * The Missed Treatment Session will appear in red on the Weekly Attendance screen.

[E] Child: E 2x30 - ST - I 01/19/21 - 06/25/21
Entry Type: Missed Treatment Session

Weekly Attendance

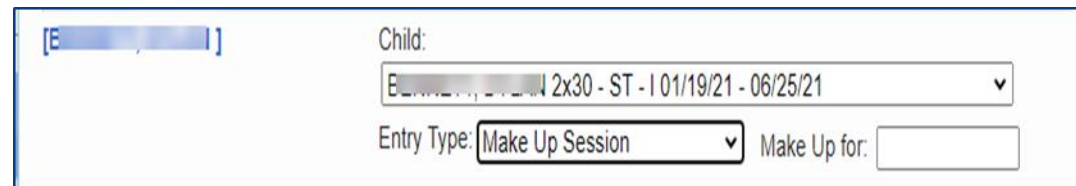
Jump To: 05/16/21 Save

May 16, 2021 - May 22, 2021

	Sunday May 16, 2021	Monday May 17, 2021	Tuesday May 18, 2021	Wednesday May 19, 2021	Thursday May 20, 2021	Friday May 21, 2021	Saturday May 22, 2021
7AM							
8AM							
9AM					09:30 am to 10:00 am		
10AM							
11AM							

Attendance Entry – Make Up

- * If session is a makeup:
 - * Choose the Entry Type - Make Up Session.
 - * In the corresponding date box that appears, indicate the date of the missed session that is being made-up.



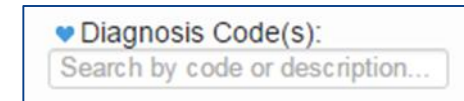
[E...]

Child: B... 2x30 - ST - I 01/19/21 - 06/25/21 ▼

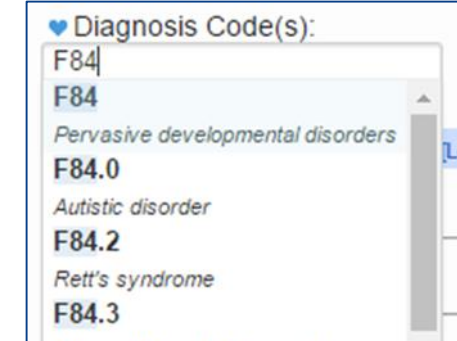
Entry Type: Make Up Session ▼ Make Up for:

Attendance Entry – Diagnosis Code

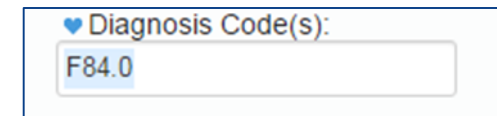
- * Type the start of the diagnosis code (or entire code)... pause for a second for list to fill... choose code.
- * Once chosen, the code will show in the text box highlighted in light blue.
- * To add a second code, repeat the process.



♥ Diagnosis Code(s):
Search by code or description...



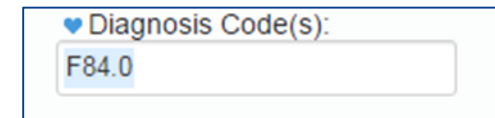
♥ Diagnosis Code(s):
F84|
F84
Pervasive developmental disorders
F84.0
Autistic disorder
F84.2
Rett's syndrome
F84.3



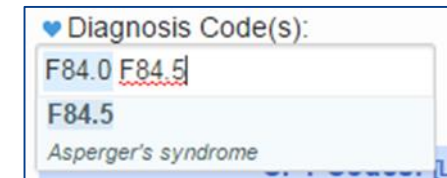
♥ Diagnosis Code(s):
F84.0

Attendance Entry – Additional Diagnosis Codes

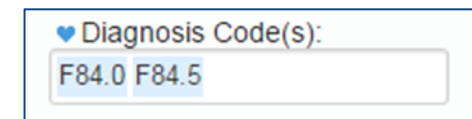
- * To add additional ICD codes:
 - * Click the blank space to the right of the last diagnosis code displayed.
 - * Type the new code... when the list appears... select the correct one.
 - * The additional codes will be displayed in the text box.



♥ Diagnosis Code(s):
F84.0



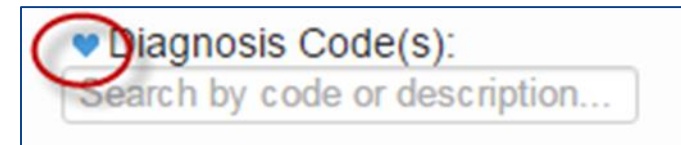
♥ Diagnosis Code(s):
F84.0 F84.5
F84.5
Asperger's syndrome



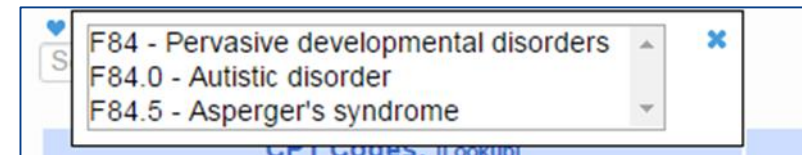
♥ Diagnosis Code(s):
F84.0 F84.5

Attendance Entry – Diagnosis Favorites

- * Click the blue heart next to the Diagnosis Code(s) label.
- * A list of the diagnosis that you pre-configured as “favorites” (My Profile screen) will appear.
- * Choose the appropriate diagnosis.






Diagnosis Code(s):
Search by code or description...





F84 - Pervasive developmental disorders
F84.0 - Autistic disorder
F84.5 - Asperger's syndrome

Attendance Entry – CPT Code

- * Type the CPT Code into the box.
- * The description will appear and the units will default to “1”.
- * If the CPT Code is an untimed code, leave the units as “1” (top example).
- * If the CPT Code is a timed code (typically based in 15 minute units), then change the number of units (bottom example).
- * Click the blue heart next to the CPT Code(s) to create favorites.

CPT Codes: [Lookup]		Units:
 <input type="text" value="92507"/>	TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/ OR AUDITORY PROCESSING DISORDER; INDIVIDUAL	<input type="text" value="1"/>
 <input type="text"/>		<input type="text"/>
 <input type="text"/>		<input type="text"/>

CPT Codes: [Lookup]		Units:
 <input type="text" value="97112"/>	THERAPEUTIC PROCEDURE, ONE OR MORE AREAS, EACH 15 MINUTES; NEUROMUSCULAR REEDUCATION OF MOVEMENT, BALANCE, COORDINATION, KINESTHETIC SENSE, POSTURE, AND/OR PROPRIOCEPTION FOR SITTING AND/OR STANDING ACTIVITIES	<input type="text" value="2"/>
 <input type="text" value="97110"/>	THERAPEUTIC PROCEDURE, ONE OR MORE AREAS, EACH 15 MINUTES; THERAPEUTIC EXERCISES TO DEVELOP STRENGTH AND ENDURANCE, RANGE OF MOTION AND FLEXIBILITY	<input type="text" value="1"/>

CPT Codes – Timed vs. Untimed

- * From CPT Code list on Resources page of SED Medicaid in Education site (<http://www.oms.nysed.gov/medicaid/resources/>)

CPT codes are either timed or untimed. Timed codes require the entry of units. When the practitioner chooses a code, the number of units must also be indicated. For example, if the physical therapist provided a service (CPT code 97140), and the session lasted 30 minutes, two units would be billed. Untimed codes are used on a one-per-session/per day basis. With one exception, providers should not report more than one physical medicine and rehabilitation therapy service for the same 15 minute time period. The only exception involves a “supervised modality” defined by CPT codes 97010-97028 which may be reported for the same 15 minute time period as other therapy services. For more information on the use of CPT codes and the claiming parameters, please contact your individual professional organizations.

Attendance Entry – Does Not Meet Medicaid Requirements

- * This is **NOT** about whether the child is Medicaid eligible or not.
- * This is to indicate that this particular session does not meet all the requirements that Medicaid requires. Examples could include...
 - * The session was not provided per the IEP because:
 - * The duration was less than the IEP (20 minutes instead of 30)
 - * The setting/location was different than specified in the IEP
 - * The IEP was for group, but there was only one child in session
 - * The IEP is for 2x30 per week, but this was the third session this week (makeup?)
- * Any other possible reason that it would not meet Medicaid standards.

☐ Does Not Meet Medicaid Requirements

Attendance Entry – Session Note

- * You can indicate progress using the progress indicators.
- * In the notes, you can record your notes per policies and regulations.
- * According to SED site, a session note is a “Brief description of the student’s progress made by receiving the service during the session”.

Progress: ☐ No Progress ☐ Limited Progress ☒ Progress

Session Notes:

Goal #1. Much more verbal. First day spontaneous speech was observed. Initial sd. rep. 1x. Additional speech fluent. Modeled slow easy speech.

Goal #2. Th sd. error. Modeled correct production.]

Editing an Existing Attendance

- * Click any session on the calendar to edit or view the details of the session.
- * If the fields are greyed out and there is no save button, that means the session is signed and **cannot** be modified without un-signing first.

Monday May 02, 2016	Tuesday May 03, 2016	Wednesday May 04, 2016	Thursday May 05, 2016	Friday May 06, 2016
			09:00 am to 09:30 am MAGDALENA DELONG	
	09:45 am to 10:15 am TRACY CRAIN	09:20 am to 09:50 am JOSEFA LEVINE		
		10:10 am to 10:40 am MAGDALENA DELONG	10:00 am to 10:30 am TRACY CRAIN	
	11:00 am to 11:30 am BRAIN LEVY	11:00 am to 11:30 am BRAIN LEVY	10:35 am to 11:05 am TRACEY FELICIANO	
			11:30 am to 12:00 pm BRAIN LEVY	
	12:00 pm to 12:30 pm TRENT MCCORMACK	12:00 pm to 12:30 pm TRENT MCCORMACK		
	01:00 pm to 01:30 pm MAGDALENA DELONG	01:00 pm to 01:30 pm TRACEY FELICIANO	12:45 pm to 01:15 pm JOSEFA LEVINE	
		01:35 pm to 02:05 pm TRACY CRAIN		
	02:30 pm to 03:00 pm RENE ORTEGA	02:30 pm to 03:00 pm RENE ORTEGA		

Group Attendance

- * Group attendance is entered using same screen.
- * If the chosen enrollment is for “group” the screen adds:
 - * A field to enter # of children in the Group.
 - * Links to select the other children in the group. The selected child is in bold.
 - * The child name appears as the generic “Child X” until you select an enrollment for Child X.
- * The screen provides for the ability to enter separate ICD, CPT and notes for each child.
- * On the calendar, they display as “GRP” and then the last names.

New Session for Jun 20, 2016

Time In: 09:15 AM Time Out: 09:45 AM Setting: Preschool

1 x 30 minute session(s) Co-Visit with Supervisor

Number of Children in Group: 3

[BERTRAND, GORDON]
[BIRCH, BRENT]
[Child 3]
[Child 4]
[Child 5]

Child 2: BIRCH, BRENT 2x30 - ST - G 12/21/15 - 06/24/16

Diagnosis Code(s): Search by code or description...

CPT Codes: [Lookup] Units:

[BERTRAND, GORDON]
[BIRCH, BRENT]
[Child 3]
[Child 4]
[Child 5]

Child 3: Not Selected

Diagnosis Code(s): Search by code or description...

09:15 am to 09:45 am
GRP BERTRAND, BIRCH

Signing Attendance

- * After attendance is entered, it needs to be signed.
- * Once it is signed, it **cannot** be modified without going through the “un-signing” process.
- * A digital signature is equivalent to signing your name on paper with ink.
- * A digital signature requires that you intentionally take action to indicate your signature.
- * The action in CPSE Portal is to enter a PIN that you have chosen.
- * Your PIN works in conjunction with your username/password.
- * You should never share your password or your PIN with anyone.

Choosing / Changing Your Pin

- * Your PIN can be numbers, letters or both.
- * Choose a PIN and click Save PIN.
- * The screen will prompt you to enter your login password.
- * This is NOT your PIN, this is the password you use to login to CPSE Portal.
- * Click Proceed

PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign attendance until you do so. Please create one now.

PIN Number:

Password Verification

For additional security, please re-enter your login password.

Password

PIN Problems

- * The # 1 issue with PINs is letting the browser save your PIN.
- * Ensure when setting/changing your PIN, that your browser doesn't try to overwrite your PIN.

PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign

PIN Number:

PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign attendance un

PIN Number:

Password Verification

For additional security, please re-enter your login password.

Password:

Signing Your Attendance

- * Items needed for Signing:
 - * You must have set your PIN.
 - * You must have your Title, Signature and Credentials entered.
 - * You must have a valid (not expired) license / profession entered.

Review and Sign

- * Go to Attendance > Digital Signature > Review and Sign Attendance
- * This will bring you to a screen which will verify your profile information as well as show unsigned attendances.

The screenshot shows the CPS Portal interface. At the top, the logo 'CPS PORTAL' is displayed, followed by a greeting: 'Hello, ALEAS.LOPEZ8884 . You are currently logged in for ALEAS L'. Below this is a navigation bar with tabs: Home, Activities, Attendance, Caseload Maintenance, Lookup, Reports, My Account, and Knowledge Base. The 'Attendance' tab is selected, and a dropdown menu is open, showing options: Classroom Attendance, Weekly Attendance, View Unsigned Attendances, Digital Signature, Sign Attendance, Review and Sign Attendance (highlighted with a mouse cursor), Sign Classroom Attendance, and Unsign Attendance. The 'Digital Signature' option is also expanded, showing 'Sign Attendance', 'Review and Sign Attendance' (highlighted), 'Sign Classroom Attendance', 'Unsign Attendance', and 'Unsign Classroom Attendance'. On the left side, the 'User Profile' section shows: Username: ALEAS.LOF, First Name: Kathleen, Last Name: Wilhelm, Email: demo@cps, and an 'Edit User Account' link. Below this is the 'My Professional Profile' section, showing Name: ALEASE LOPEZ, NPI: 1234567890 (Invalid NPI), and a 'Hide' button. The 'My License(s)' section contains a table with columns: Profession, License, Original Date Of Licensure, Registered Through Date, License Lookup, Attestation Status, and Attest. The table has one row: Licensed Occupational Therapist, 012345, (blank), (blank), Lookup, DOES NOT REQUIRE ATTESTATION, (blank). At the bottom, the 'My signature' section shows a digital signature of Alease Lopez, OTR/L, with the text 'Alease Lopez, OTR/L' and an 'Edit My Profile' link.

CPS PORTAL Hello, ALEAS.LOPEZ8884 . You are currently logged in for ALEAS L

Home Activities Attendance Caseload Maintenance Lookup Reports My Account Knowledge Base

Classroom Attendance
Weekly Attendance
View Unsigned Attendances
Digital Signature
Sign Attendance
Review and Sign Attendance
Sign Classroom Attendance
Unsign Attendance
Unsign Classroom Attendance

User Profile
Username: ALEAS.LOF
First Name: Kathleen
Last Name: Wilhelm
Email: demo@cps
Edit User Account

My Professional Profile
Name: ALEASE LOPEZ
NPI: 1234567890 Invalid NPI
Hide

My License(s)

Profession	License	Original Date Of Licensure	Registered Through Date	License Lookup	Attestation Status	Attest
Licensed Occupational Therapist	012345			Lookup	DOES NOT REQUIRE ATTESTATION	

My signature
Alease Lopez, OTR/L
Alease Lopez, OTR/L
Edit My Profile

Review and Sign

- * Within the unsigned attendances, there will also be icons listed under the “Status”

- ✓ A green check means there are no errors
- ⚠ A yellow exclamation point is a warning and will not prevent signing.
- ✗ A red “X” means there is an error that will prevent signing.

The screenshot displays the NYS Office of Professions Search interface. At the top, there is a navigation bar with links: Home, My Profile, My Account, My Credentials, My Attendances, My Reports, My Settings, and My Dashboard. The main content area is titled "Profile" and shows the following information:

- First Name:** ALEASE **Last Name:** LOPEZ **NPI:** 1234567890
- Signing As:** Alease Lopez, OTR/L
- Credentials:** A table showing the user's credentials.
- Missing Attestations:** No Missing Attestations!
- PIN Created:** Yes

Below the profile information, there is a section titled "Unsigned Attendances". It includes a dropdown menu for "School Year Session" (set to "(School Year Session)"), an "Apply Filter" button, and a table of attendances. The table has columns: Status, Child, Date of Service, Time In, Time Out, and Edit. The attendances are listed as follows:

Status	Child	Date of Service	Time In	Time Out	Edit
⚠	BLOCK, JOAQUIN	3/5/2018	12:00	12:30	Edit
⚠	BLOCK, JOAQUIN	3/6/2018	12:00	12:30	Edit
✗	BLOCK, JOAQUIN	3/8/2018	08:00	08:30	Edit
⚠	BLOCK, JOAQUIN	3/9/2018	11:15	11:45	Edit
⚠	SEXTON, DONALD	3/5/2018	08:00	08:30	Edit
✗	SEXTON, DONALD	3/6/2018	08:15	08:45	Edit
⚠	SEXTON, DONALD	3/6/2018	12:50	01:20	Edit
✗	SEXTON, DONALD	3/7/2018	08:15	08:45	Edit

Review and Sign

- * By clicking on the icon, you can see what the reason is.

The screenshot displays a software interface with a navigation bar at the top containing links: Home, Activities, Attendance, Caseload Maintenance, Lookup, Reports, My Account, and Knowledge Base. The main content area is divided into two sections. The top section, titled 'Profile', shows user information for ALEASE LOPEZ (NPI: 1234567890) and includes options to edit signing information, credentials, missing attestations, and PIN creation. The bottom section, titled 'Unsigned Attendances', shows a table of attendance records for a selected school year session. A yellow arrow points from a warning icon in the attendance table to a pop-up window titled 'Issues Found With Attendance'.

Profile Information:

- First Name: ALEASE, Last Name: LOPEZ, NPI: 1234567890
- Signing As: Alease Lopez, OTR/L
- Credentials: OT, Licensed Occupational Therapist, License # 012345, State NY
- Missing Attestations: No Missing Attestations!
- PIN Created: [Status]

Unsigned Attendances:

School Year Session: (School Year Session)

Issues Found With Attendance:

Issue Type	Description	Data Causing Issue
WARNING	Exceeds Weekly Frequency for Enrollment	Enrollment Frequency: 3x30

The attendance table below shows records for JOAQUIN BLOCK and DONALD SEXTON, with dates ranging from 3/5/2018 to 3/7/2018. Each record includes a status icon (warning or error), the child's name, date of service, and time slots.

Status	Child	Date of Service	Time	Action
Warning	BLOCK, JOAQUIN	3/5/2018		
Warning	BLOCK, JOAQUIN	3/6/2018	12:00 - 12:30	Edit
Error	BLOCK, JOAQUIN	3/8/2018	08:00 - 08:30	Edit
Warning	BLOCK, JOAQUIN	3/9/2018	11:15 - 11:45	Edit
Warning	SEXTON, DONALD	3/5/2018	08:00 - 08:30	Edit
Error	SEXTON, DONALD	3/6/2018	08:15 - 08:45	Edit
Warning	SEXTON, DONALD	3/6/2018	12:50 - 01:20	Edit
Error	SEXTON, DONALD	3/7/2018	08:15 - 08:45	Edit

Review and Sign

Home Activities Attendance Caseload Maintenance Lookup Reports My Account Knowledge Base

Profile
First Name: ALEASE Last Name: LOPEZ NPI: 1234567890

Editing: ☒ Signing As: Alease Lopez, OTR/L

Editing: ☒ Credentials:

Status	Profession Code	Description	Credential Type	#	State	From	To
<input checked="" type="checkbox"/>	OT	Licensed Occupational Therapist	License	012345	NY		

Editing: ☒ Missing Attestations: No Missing Attestations

Editing: ☒ PIN Created

Unsigned Attendances

School Year Session: (School Year Session)

Audit By Week By Enrollment

Status	Child	Date of Service	Start Time	End Time	Edit
	BLOCK, JOAQUIN	3/5/2018			
	BLOCK, JOAQUIN	3/6/2018			
	BLOCK, JOAQUIN	3/8/2018			
	BLOCK, JOAQUIN	3/9/2018	11:15	11:45	Edit
	SEXTON, DONALD	3/5/2018	08:00	08:30	Edit
	SEXTON, DONALD	3/6/2018	08:15	08:45	Edit
	SEXTON, DONALD	3/6/2018	12:50	01:20	Edit
	SEXTON, DONALD	3/7/2018	08:15	08:45	Edit

Issues Found With Attendance:

Issue Type	Description	Data Causing Issue
ERROR	Attendance is missing required field	Session Notes: Missing ICD Codes: Missing
WARNING	Attendance duration differs from the expected time of the CPT codes on attendance	Expected Service Time: 45 Actual Service Time: 30 CPT Code: 97530 CPT Duration: 15
WARNING	Attendance duration differs from the expected time of the CPT codes on attendance	Expected Service Time: 45 Actual Service Time: 30 CPT Code: 97533 CPT Duration: 30
WARNING	Exceeds Weekly Frequency for Enrollment	Enrollment Frequency: 3x30
ERROR	Medicaid eligible attendance does not contain a billable ICD code	

Ok

Review and Sign

- * By Week:

- * Under the “By Week” tab, the attendances are listed by date.
- * You may view more information, as well as sign the attendances, by clicking the “Review & Sign” link under the navigation column.

The screenshot displays the CPSE PORTAL interface. At the top, the user is logged in as ALEASE LOPEZ. The navigation bar includes links for Home, Activities, Attendance, Caseload Maintenance, Lookup, Reports, My Account, and Knowledge Base. The main content area shows the user's profile, including their first and last name, NPI, and a table of credentials. Below the profile, there is a section for 'Unsigned Attendances' with a dropdown for 'School Year Session' and an 'Apply Filter' button. The 'By Week' tab is selected, showing a table with columns for Start Date, End Date, Number Of Unsigned Attendances, and Navigation. The table lists two periods: 03/04/2018 to 03/10/2018 with 15 attendances, and 03/11/2018 to 03/17/2018 with 3 attendances. Both rows have a 'Review And Sign' link in the navigation column, which is circled in red.

CPSE PORTAL Hello, ALEAS.LOPEZ8884 . You are currently logged in for **ALEASE LOPEZ** (Logout)

Home Activities Attendance Caseload Maintenance Lookup Reports My Account Knowledge Base

Profile

First Name: ALEASE **Last Name:** LOPEZ **NPI:** 1234567890

Signing As: Alease Lopez, OTR/L

Status	Profession Code	Description	Credential Type	#	State	From	To
✓	OT	Licensed Occupational Therapist	License	012345	NY		

[NYS Office of Professions Search](#)

Missing Attestations: No Missing Attestations!

PIN Created

Unsigned Attendances

School Year Session: (School Year Session) [Apply Filter](#)

Audit By Week By Enrollment

Start Date	End Date	Number Of Unsigned Attendances	Navigation
03/04/2018	03/10/2018	15	Review And Sign
03/11/2018	03/17/2018	3	Review And Sign

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Review and Sign

- * You will then be able to toggle between days of the week.

- * To sign:
 - * Check the desired boxes & click “sign”
 - * If there is a problem with the attendance that you’d like to correct, use the edit button.

Home Activities Attendance Case Load Maintenance Lookup Reports My Account Knowledge Base

Unsigned Attendances

Showing Attendances for the week of: 5/4/2018 - 3/10/2018 Sign

Sunday (0) Monday (5) Tuesday (5) Wednesday (1) Thursday (1) Friday (5) Saturday (0)

Status	Child Name	ESID	Service Type	Service Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes	
	SEXTON, DONALD	RS1718W0054248	OT	03/05/18	08:00 AM	08:30 AM	30	1.00	30	30	97530 (x1), 97533 (x1)	R62.50		Edit
	BURROWS, TYREE	RS1718W0054966	OT	03/05/18	10:00 AM	10:30 AM	30	1.00	30	30	97530 (x1), 97533	R62.50		Edit

Review and Sign

- * By Enrollment:
 - * Under the “By Enrollment” tab, the attendances are listed by enrollment.
 - * You may view more information, as well as sign the attendances, by clicking the “Review & Sign” link under the navigation column.

The screenshot displays the CPSE PORTAL interface. At the top, the user is logged in as ALEASE LOPEZ. The navigation menu includes Home, Activities, Attendance, Caseload Maintenance, Lookup, Reports, My Account, and Knowledge Base. The Profile section shows the user's details: First Name: ALEASE, Last Name: LOPEZ, NPI: 1234567890. It also shows the user is signed as Alease Lopez, OTR/L. A table lists the user's credentials, showing a License for Occupational Therapist with ID 012345 in NY. Below this, it indicates no missing attestations and that a PIN has been created. The Unsigned Attendances section is active, showing a dropdown for the School Year Session and an Apply Filter button. A table lists six children with their ESID, Service Month, Service, and Number of Unsigned Attendances. Each row has a 'Review And Sign' link in the Navigation column.

Child	ESID	Service Month	Service	Number Of Unsigned Attendances	Navigation
BLOCK, JOAQUIN	RS1718W0057165	March 2018	OT	5	Review And Sign
BRAY, OLIN	RS1718W0054342	March 2018	OT	2	Review And Sign
BURROWS, TYREE	RS1718W0054986	March 2018	OT	3	Review And Sign
ENGEL, IGNACIO	RS1718W0054642	March 2018	OT	2	Review And Sign
SEXTON, DONALD	RS1718W0054249	March 2018	OT	5	Review And Sign
SLOAN, LEONEL	RS1718W0054245	March 2018	OT	1	Review And Sign

Review and Sign

- * To sign:

- * Check the desired boxes & click “sign”
- * If there is a problem with the attendance that you’d like to correct, use the edit button.

The screenshot shows a software interface for managing attendance. At the top, there is a navigation bar with tabs: Home, Activities, Attendance, Caseload Maintenance, Lookup, Reports, My Account, and Knowledge Base. Below the navigation bar, there is an "Enrollment Info" box containing the following details:

- Child Name: BLOCK, JOAQUIN
- ESID: RS1718/W0057165
- Service Type: Occupational Therapy IND
- Frequency: 3x30
- Dates: 10/20/17 - 06/21/18
- Status: OK

To the right of the enrollment info is a calendar for March 2018. The calendar shows days of the week (Sun to Sat) and dates. Some dates are highlighted in yellow (4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31). The 8th is highlighted in red.

Below the calendar is a "Sign Attendance" button. Below that is a table of attendance records. The table has the following columns: Status, Service Date, Time In, Time Out, Duration, Sessions To Bill, Minutes Per Session, Minutes To Bill, CPT Codes, ICD Codes, Notes, and an action column with buttons.

Status	Service Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes	Action
	03/05/18	12:00 PM	12:30 PM	30	1.00	30	30	97530 (x1) 97533 (x1)	Q86.0		Edit
	03/06/18	12:00 PM	12:30 PM	30	1.00	30	30	97530 (x1) 97533 (x1)	Q86.0		Edit
	03/06/18	08:00 AM	08:30 AM	30	1.00	30	30	97530 (x1) 97533 (x2)			Edit
	03/06/18	11:15 AM	11:45 AM	30	1.00	30	30	97530 (x1)	Q86.0		Edit

Sign By Entering PIN

- * With rows selected, click the “Sign Attendance Button”.

From Date: 3/20/2016 To Date: 6/20/2016 Enrollment: Not Selected County: ERIE Provider: HIGHER LEARNING Retrieve Sign Attendance

<input type="checkbox"/>	Last Name	First Name	Service Date	# of Sessions	Minutes Per Sessions	Service Setting	CoVisit Therapist	Make Up For	Start Time	End Time	CPT Codes	ICD Code	
<input checked="" type="checkbox"/>	FELICIANO	TRACEY	5/05/2016	1	30	Universal Pre-K			10:35 AM	11:05 AM	92507	F80.1, F80.2	Notes for tra amet, conse interdum nu congue mai pretium mol

- * In the box that appears:
 - * Confirm your information
 - * Enter your PIN
 - * Click I Agree to certify that you have reviewed the information and you are signing attesting that everything is correct

By entering my pin number, I/We certify that on the dates selected, the selected children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

NOTE: Credentials are REQUIRED to sign. Please verify credentials below. If they are not correct, update them on your [profile page](#).

Name & Credentials: CECILA CUELLAR, CCC-SLP

NPI: 1205011178

Date: 6/20/2016

Pin:

I agree.

Sign Frequently

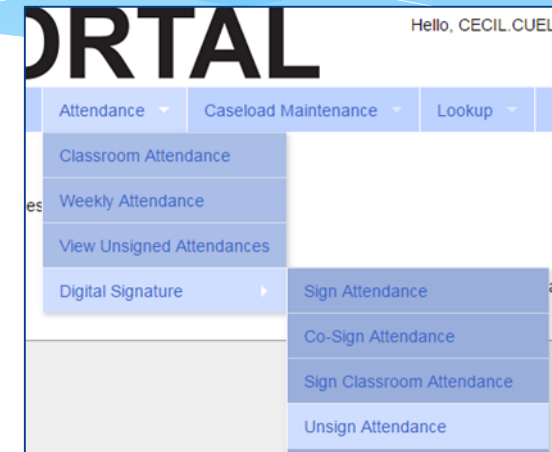
- * As a best practice, you should sign frequently.
 - * At the end of the day after you record your notes for the day, or at the end of the week.
- * Waiting until the end of the month causes problems.
 - * There are too many entries to do a proper review.
 - * It is too long past the activity to remember anything.

Un-signing Attendance – Making Corrections After Attendance is Signed

- * If after you reviewed and signed attesting that everything was accurate, a mistake is noticed, the process to correct is as follows:
 - * If the entry is on a voucher to be billed (but hasn't been paid), it needs to be removed from the voucher.
 - * Use the Unsign screen to unsign the Attendance.
 - * Edit the attendance to make the correction.
 - * You can then review and sign the attendance again.

Un-signing Attendance

- * Search for attendances.
- * Click check box on rows to unsign.
- * Click Unsign Attendance.
- * Enter the reason (ex. entered wrong time).
- * Enter your PIN.
- * Click I Agree attesting that you previously verified signed but are inaccurate.



By entering my pin number, I/We certify that on the dates selected, the selected services, which I previously verified and signed, were not accurate, and must be changed in order to accurately reflect the services that took place for the specified children on the specified dates.

Reason for unsigning

Pin

View Unsigned Attendance

- * Go to Attendance > View Unsigned Attendance
- * This will give you a list of attendances that have been started but not completed. Incomplete attendances can be deleted from here.

Attendance ▾ Billing ▾ Caseload ▾

Service Attendance

Classroom Management

Classroom Attendance

Weekly Attendance

Delete Uploaded Attendance ▸

Upload Attendance File

Validate Attendance File

View Unsigned Attendances ▸

Digital Signature ▸

Signed Attendances Missing Cosignature

Move Attendance Between Enrollments

Unsigned Attendances

Enrollment Type (All) Provider HOFFMAN, KRISTEN From Date 03/01/2020 To Date 03/31/2020 Search

Last Name	First Name	Service Date	Start Time	End Time	Attendance Type	Enrollment Type	RS Type	Service Provider	ESID	
AYERS	ISABELL	3/18/2020	11:00 AM	11:15 AM						Delete

Activity Management

- * The activities screen is used to record any activities related to a child/enrollment that are not directly billable. At this time, none of these entries are submitted to the County. Some examples are:
 - * Absences
 - * Meetings
 - * Coordination activities
- * Go to Activities > Activity Management.



Activity Management

- * Choose a date, and click Add Activity.

April 2016

May 2016

June 2016

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Showing Activities & Attendances for 05/03/2016

Add Activity

Activities

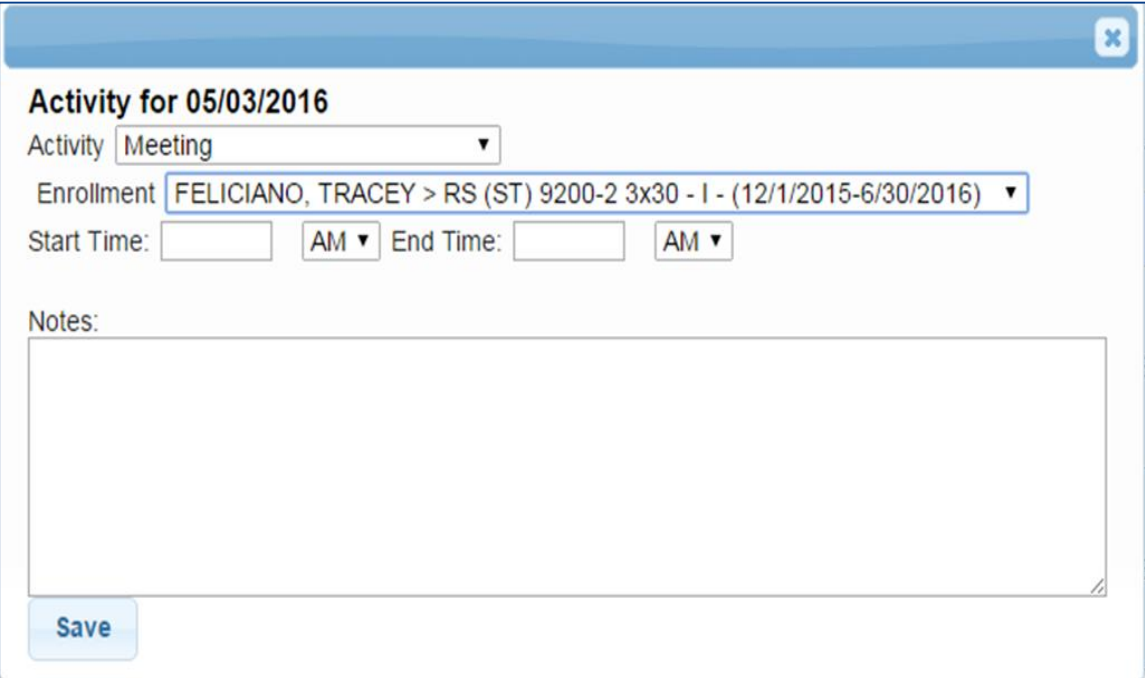
Start	End	Last Name	First Name	ESID	Type	Notes	
9:30 AM	10:00 AM	FELICIANO	TRACEY	RS1516W0081917	Child Absent	Sick	<div>EditDelete</div>

Attendances

Start	End	Last Name	First Name	ESID	Type	Units	Notes
9:45 AM	10:15 AM	CRAIN	TRACY	RS1516W0079839	ST - I	1.00 x 30	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus ...
11:00 AM	11:30 AM	LEVY	BRAIN	RS1516W0081914	ST - I	1.00 x 30	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus ...
12:00 PM	12:30 PM	MCCORMACK	TRENT	RS1516W0081895	ST - I	1.00 x 30	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus ...
1:00 PM	1:30 PM	DELONG	MAGDALENA	RS1516W0079750	ST - I	1.00 x 30	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus ...
2:30 PM	3:00 PM	ORTEGA	RENE	RS1516W0082830	ST - I	1.00 x 30	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus ...

Activity Entry

- * Choose the Activity Type
- * Choose Enrollment
- * Enter Start Time / End Time
- * Enter a note
- * Click Save



The screenshot shows a web-based form titled "Activity for 05/03/2016". The form contains the following fields:

- Activity:** A dropdown menu with "Meeting" selected.
- Enrollment:** A dropdown menu with "FELICIANO, TRACEY > RS (ST) 9200-2 3x30 - I - (12/1/2015-6/30/2016)" selected.
- Start Time:** A text input field followed by an "AM" dropdown menu.
- End Time:** A text input field followed by an "AM" dropdown menu.
- Notes:** A large, empty text area for entering notes.
- Save:** A blue button at the bottom left of the form.

View Caseload – For Service Providers

- * Are you a Service Provider working for an agency, and can't find one of your students?
- * Go to Caseload Maintenance > My Caseload
- * If the child is not listed, contact the administrator of your agency and ask them to assign the child to you.



View Caseload

- * You can also see all of the attendances that you entered for the child by clicking on Attendances.

My Caseload													
<div> Filter By <div> Provider: GEBAUER,BETTY Session: 2019 - 2020 Winter Search </div> </div>													
	Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned	
<input type="checkbox"/>		RS1920W0023159	AYERS	ISABELL	Albany	GEBAUER,BETTY	GUILDERLAND CSD	RS	12/09/19	06/26/20	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0022957	BENTON	JERROD	Albany	GEBAUER,BETTY	GUILDERLAND CSD	RS	09/23/19	06/26/20	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0014784	CHERRY	YONG	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	09/03/19	11/19/19	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0015042	CHERRY	YONG	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	11/20/19	06/26/20	ST1 1x30 Group		Attendances
<input type="checkbox"/>		RS1920W0015043	CHERRY	YONG	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	11/20/19	06/26/20	ST 1x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0014850	COPE	ROGELIO	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	10/07/19	06/26/20	ST1 2x30 Group		Attendances
<input type="checkbox"/>		RS1920W0015008	COPE	ROGELIO	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	11/25/19	06/26/20	COR 1x30 MONTHLY Individual		Attendances
<input type="checkbox"/>		RS1920W0014799	DAVILA	FOSTER	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	09/03/19	03/06/20	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0014800	DAVILA	FOSTER	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	09/03/19	03/06/20	COR 1x30 MONTHLY Individual		Attendances
<input type="checkbox"/>		RS1920W0015027	DOCKERY	EDWARD	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	12/09/19	06/26/20	ST1 2x30 Group		Attendances
<input type="checkbox"/>		RS1920W0015168	DOCKERY	EDWARD	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	01/27/20	06/26/20	COR 1x30 MONTHLY Individual		Attendances
<input type="checkbox"/>		RS1920W0015204	ELDRIDGE	ELWOOD	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	01/27/20	06/26/20	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0014945	FOSTER	ERNEST	SCHENECTADY	GEBAUER,BETTY	Schalmont	RS	10/29/19	01/28/20	ST 1x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0014937	FULTON	ALBERT	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	11/12/19	06/26/20	ST1 3x30 Group		Attendances
<input type="checkbox"/>		RS1920W0014737	HARDEN	DUDLEY	SCHENECTADY	GEBAUER,BETTY	Schalmont	RS	09/03/19	09/23/19	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0014845	HARDEN	DUDLEY	SCHENECTADY	GEBAUER,BETTY	Schalmont	RS	09/24/19	06/26/20	ST 3x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0023219	HERBERT	DUNCAN	Albany	GEBAUER,BETTY	GUILDERLAND CSD	RS	01/20/20	06/26/20	ST 3x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0023268	HERBERT	DUNCAN	Albany	GEBAUER,BETTY	GUILDERLAND CSD	RS	01/20/20	06/26/20	COR 1x30 MONTHLY Individual		Attendances
<input type="checkbox"/>		RS1920W0022745	HONG	IRA	Albany	GEBAUER,BETTY	GUILDERLAND CSD	RS	09/04/19	06/26/20	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0015057	HUGHES	RUSSELL	SCHENECTADY	GEBAUER,BETTY	Schalmont	RS	10/29/19	11/25/19	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0015058	HUGHES	RUSSELL	SCHENECTADY	GEBAUER,BETTY	Schalmont	RS	11/26/19	06/26/20	ST1 1x30 Group		Attendances
<input type="checkbox"/>		RS1920W0015059	HUGHES	RUSSELL	SCHENECTADY	GEBAUER,BETTY	Schalmont	RS	11/26/19	06/26/20	ST 1x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0014812	JONES	MICHAEL	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	09/03/19	10/04/19	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0014857	JONES	MICHAEL	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	10/07/19	06/26/20	ST1 2x30 Group		Attendances
<input type="checkbox"/>		RS1920W0014555	KRAUSE	EVON	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	09/03/19	06/26/20	ST1 2x30 Group		Attendances
<input type="checkbox"/>		RS1920W0022743	LEARY	STEVIE	Albany	GEBAUER,BETTY	GUILDERLAND CSD	RS	09/04/19	11/21/19	ST 2x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0023123	LEARY	STEVIE	Albany	GEBAUER,BETTY	GUILDERLAND CSD	RS	11/22/19	06/26/20	ST 1x30 Individual		Attendances
<input type="checkbox"/>		RS1920W0023124	LEARY	STEVIE	Albany	GEBAUER,BETTY	GUILDERLAND CSD	RS	11/22/19	06/26/20	ST1 1x30 Group		Attendances
<input type="checkbox"/>		RS1920W0014897	LONG	MARTIN	SCHENECTADY	GEBAUER,BETTY	Schalmont	RS	10/29/19	06/26/20	ST 2x30 Individual		Attendances

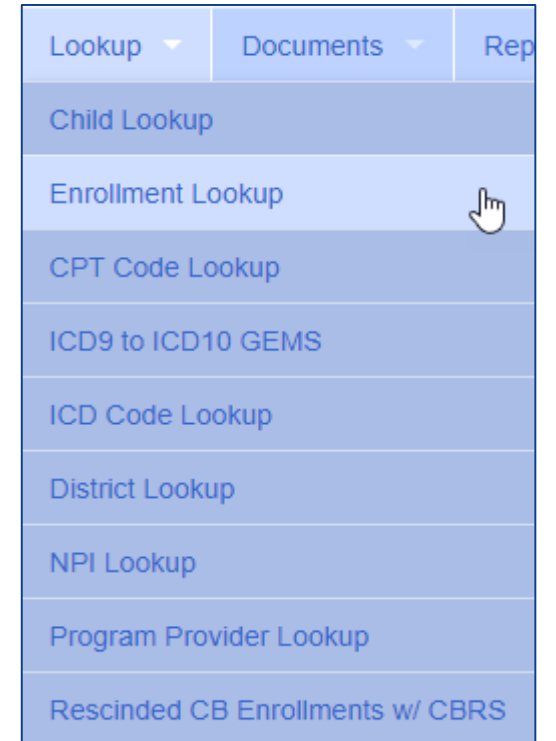
View Caseload

- * In the screen shot below you can see that the last 4 attendances have not been signed by the service provider.

Attendance List														
Child Name: AYERS, ISABELL			County: Albany			Provider: GEBAUER, BETTY			District: GUILDERLAND CSD					
ESID: RS1920W0023159			From/To: 12/9/2019-6/26/2020			Service: RS-ST (IND)			Frequency: 2x30					
Service Date	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	
12/10/19			12:50 PM	1:20 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	01/04/20	01/04/20	RS200102193725	Treatment Log
12/12/19			12:55 PM	1:25 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	01/04/20	01/04/20	RS200102193725	Treatment Log
12/17/19			12:15 PM	12:45 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	01/04/20	01/04/20	RS200102193725	Treatment Log
12/19/19			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	01/04/20	01/04/20	RS200102193725	Treatment Log
01/02/20			1:30 PM	2:05 PM	35	1.00	30	KRISTEN HOFFMAN	Home	I	02/02/20	02/02/20	RS200213143706	Treatment Log
01/07/20			12:50 PM	1:20 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	02/02/20	02/02/20	RS200213143706	Treatment Log
01/09/20			1:00 PM	1:35 PM	35	1.00	30	KRISTEN HOFFMAN	Home	I	02/02/20	02/02/20	RS200213143706	Treatment Log
01/14/20			1:20 PM	1:50 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	02/02/20	02/02/20	RS200213143706	Treatment Log
01/16/20			12:55 PM	1:30 PM	35	1.00	30	KRISTEN HOFFMAN	Home	I	02/02/20	02/02/20	RS200213143706	Treatment Log
01/21/20			3:50 PM	4:20 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	02/02/20	02/02/20	RS200213143706	Treatment Log
01/23/20			12:55 PM	1:25 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	02/02/20	02/02/20	RS200213143706	Treatment Log
01/30/20			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	02/02/20	02/02/20	RS200213143706	Treatment Log
02/04/20			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	03/08/20	03/08/20	RS200308133622	Treatment Log
02/06/20			1:05 PM	1:35 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	03/08/20	03/08/20	RS200308133622	Treatment Log
02/11/20			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	03/08/20	03/08/20	RS200308133622	Treatment Log
02/13/20			3:00 PM	3:30 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	03/08/20	03/08/20	RS200308133622	Treatment Log
02/25/20			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	03/08/20	03/08/20	RS200308133622	Treatment Log
02/27/20			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I	03/08/20	03/08/20	RS200308133622	Treatment Log
03/03/20			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I				Treatment Log Details
03/05/20			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Home	I				Treatment Log Details
03/12/20			12:55 PM	1:30 PM	35	1.00	30	KRISTEN HOFFMAN	Home	I				Treatment Log Details
03/18/20		Not OK	11:00 AM	11:15 AM	15	1.00	30	KRISTEN HOFFMAN		I				Treatment Log Details

Enrollment Lookup – For Agency Staff or Independent Providers

- * You can search for enrollments to find all students that have been assigned to your agency. You can also see all attendances that you have entered on the enrollment.
- * If a child is not listed, then contact the County.
- * Go to Lookup > Enrollment Lookup



Enrollment Lookup

- * Filter the School Year Session, County, and what enrollment type you are looking for.
- * Click on Attendances to see all attendances entered on the enrollment.

Enrollments

School Year Session 2019 - 2020 Winter County SCHENECTADY
☐ CBRS
☒ RS
☐ SEIT
☐ CB

Provider GEBAUER,BETTY
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	
	RS1920W0014784	CHERRY	YONG	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	ST	9/3/2019	11/19/2019	2x30	I	9200-2		51.50	16.00	10	11	Attendances
	RS1920W0015042	CHERRY	YONG	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	ST1	11/20/2019	6/26/2020	1x30	G	9200-2		51.50	8.00	30	31	Attendances
	RS1920W0015043	CHERRY	YONG	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	ST	11/20/2019	6/26/2020	1x30	I	9200-2		51.50	11.00	30	31	Attendances
	RS1920W0014850	COPE	ROGELIO	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST1	10/7/2019	6/26/2020	2x30	G	9200-2		51.50	28.00	36	37	Attendances
	RS1920W0015008	COPE	ROGELIO	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	COR	11/25/2019	6/26/2020	1x30 MONTHLY	I	9200-2		51.50	3.00	29	30	Attendances
	RS1920W0014799	DAVILA	FOSTER	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	ST	9/3/2019	3/6/2020	2x30	I	9200-2		51.50	37.00	25	26	Attendances
	RS1920W0014800	DAVILA	FOSTER	SCHENECTADY	GEBAUER,BETTY	Mohonasen	RS	COR	9/3/2019	3/6/2020	1x30 MONTHLY	I	9200-2		51.50	4.00	25	26	Attendances
	RS1920W0015027	DOCKERY	EDWARD	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST1	12/9/2019	6/26/2020	2x30	G	9200-2		51.50	16.00	27	28	Attendances
	RS1920W0015168	DOCKERY	EDWARD	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	COR	1/27/2020	6/26/2020	1x30 MONTHLY	I	9200-2		51.50	1.00	21	21	Attendances
	RS1920W0015204	ELDRIDGE	ELWOOD	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST	1/27/2020	6/26/2020	2x30	I	9200-2		51.50	7.00	21	21	Attendances
	RS1920W0014945	FOSTER	ERNEST	SCHENECTADY	GEBAUER,BETTY	Schalmont	RS	ST	10/29/2019	1/28/2020	1x30	I	9200-2		51.50	9.00	13	13	Attendances
	RS1920W0014937	FULTON	ALBERT	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST1	11/12/2019	6/26/2020	3x30	G	9200-2		51.50	30.00	31	32	Attendances

Enrollment Lookup – Attendance List

- * This will also show if the attendances have been billed, and what Voucher # they have been billed on.
- * Click on Treatment Log to see the actual session note.

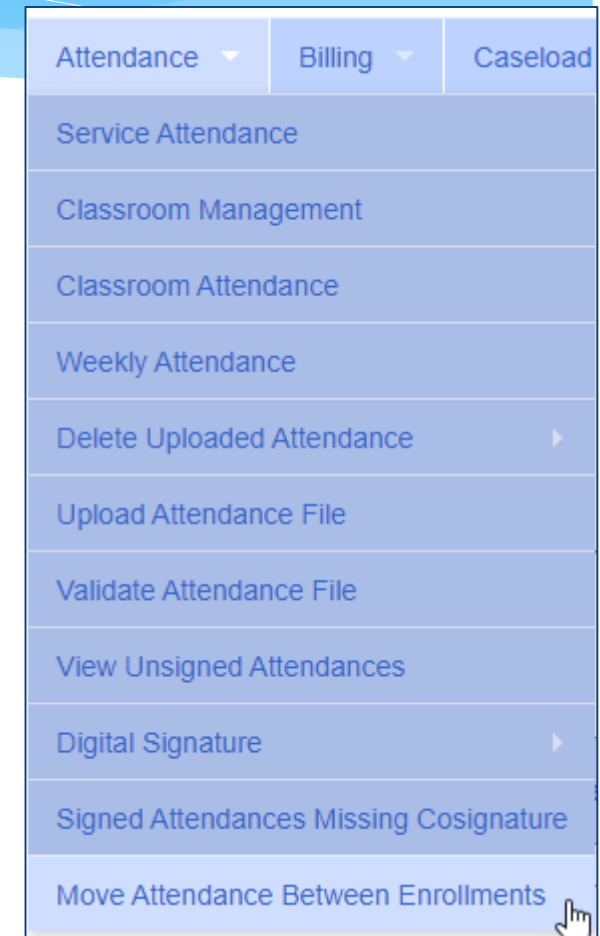
Attendance List

Child Name: CHERRY, YONG County: SCHENECTADY Provider: GEBAUER, BETTY District: Mohonasen
 ESID: RS1920W0014784 From/To: 9/3/2019-11/19/2019 Service: RS-ST (IND) Frequency: 2x30

Service Date	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	
09/11/19			9:10 AM	9:40 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/16/19			9:35 AM	10:05 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/18/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/23/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/25/19			8:55 AM	9:25 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/30/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
10/02/19			9:15 AM	9:45 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/07/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/09/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/21/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/23/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/28/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
11/01/19			11:15 AM	11:45 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log
11/13/19			9:10 AM	9:40 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log
11/15/19			10:50 AM	11:20 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log
11/18/19			9:15 AM	9:45 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log

Move Attendance Between Enrollments

- * If attendances have been entered on the wrong enrollment, then they can be moved from one enrollment to another without the service provider having to recreate the attendances.
- * In order to move the attendances, they **cannot** be on a voucher.
- * Go to Attendance > Move Attendances Between Enrollments



Move Attendance Between Enrollments

- * Filter the School Year, Provider & Last Name of the child.
- * This will pull up all enrollments for the child for the school year chosen.

Move Attendance Between Enrollments

School Year Session Provider Last Name

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
2019 - 2020 Winter	SCHENECTADY	Schalmont	GEBAUER,BETTY	RS1920W0014737	HARDEN	DUDLEY	RS	9/3/2019	9/23/2019	ST	2x30	I	Select
2019 - 2020 Winter	SCHENECTADY	Schalmont	GEBAUER,BETTY	RS1920W0014845	HARDEN	DUDLEY	RS	9/24/2019	6/26/2020	ST	3x30	I	Select

Move Attendance Between Enrollments

- * Select Enrollment by clicking “Select” to the Right.
- * Check correct attendances boxes on left
- * Click on “Select” on right for applicable enrollment
- * Click on “Move” to move attendance to the other enrollment
- * You will the confirmation: Attendances moved successfully

Move Attendance Between Enrollments

School Year Session 2019 - 2020 Winter Provider GEBAUER,BETTY Last Name harden Search

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
2019 - 2020 Winter	SCHENECTADY	Schalmont	GEBAUER,BETTY	RS1920W0014737	HARDEN	DUDLEY	RS	9/3/2019	9/23/2019	ST	2x30	I	Select
2019 - 2020 Winter	SCHENECTADY	Schalmont	GEBAUER,BETTY	RS1920W0014845	HARDEN	DUDLEY	RS	9/24/2019	6/26/2020	ST	3x30	I	Select

Selected Enrollment Info

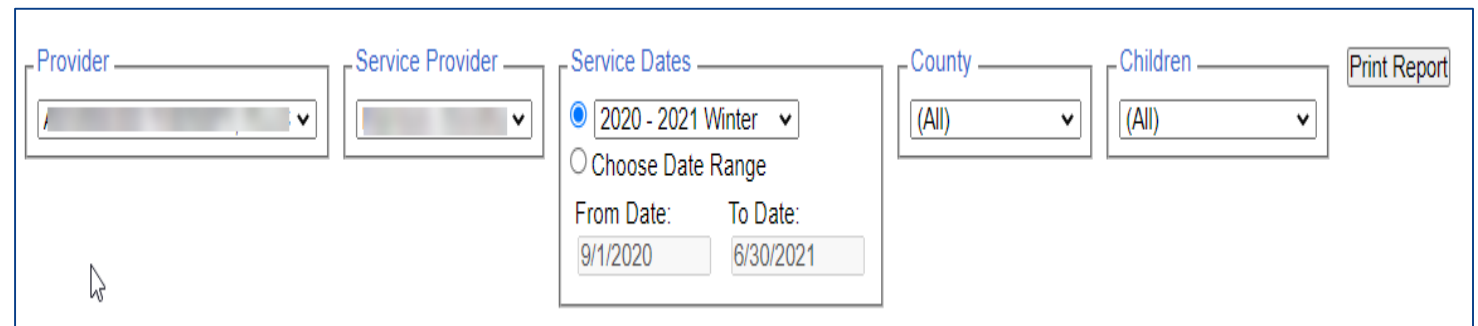
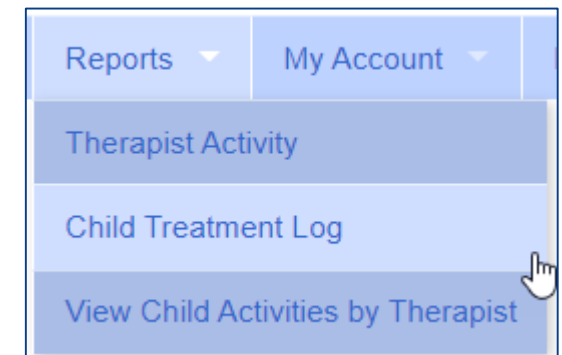
Service Date	Service Provider	Individual Or Group
<input type="checkbox"/> 3/3/2020	KRISTEN HOFFMAN	I
<input type="checkbox"/> 3/5/2020	KRISTEN HOFFMAN	I
<input type="checkbox"/> 3/6/2020	KRISTEN HOFFMAN	I
<input type="checkbox"/> 3/10/2020	KRISTEN HOFFMAN	I
<input type="checkbox"/> 3/11/2020	KRISTEN HOFFMAN	I
<input type="checkbox"/> 3/12/2020	KRISTEN HOFFMAN	I

	County	District	ESID	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group
Select	SCHENECTADY	Schalmont	RS1920W0014737	RS	9/3/2019	9/23/2019	ST	2x30	I

Move

Print Child Treatment Log

- * Go to Reports > Child Treatment Log
- * The filters will allow you to specify criteria for the report.
 - * Select Service Provider
 - * Select Service Dates
 - * Select County
 - * Select Child(ren)

A screenshot of the filter form for the Child Treatment Log report. The form includes several dropdown menus and a date range selector. The 'Provider' and 'Service Provider' dropdowns are currently blank. The 'Service Dates' section has the '2020 - 2021 Winter' radio button selected. The 'County' dropdown is set to '(All)' and the 'Children' dropdown is also set to '(All)'. A 'Print Report' button is located to the right of the form. A mouse cursor is visible near the bottom left of the form.

Print Child Treatment Log



Child Treatment Log

Printed: 5/28/2021 8:25:51 AM

Page 1 of 2

09/01/2020 - 06/30/2021

ESID: CBR2021W Occupational Therapy- Individual

Child: C

Date of Birth: 8

Therapist: Do

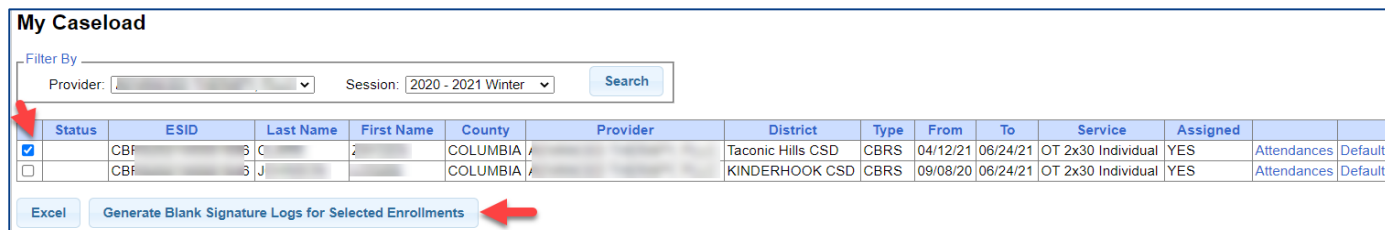
Date / Time	Setting	ICD/CPT Codes	Notes	
04/16/21 In: 10:05AM Out: 10:35AM	Universal Pre-K Classroom	F82 97530x2	Student engaged in fine motor tabletop task tracing three various shapes, triangle, circle and square with modified tripod grasp and 1 vc to stay on boundary line while tracing to increase coordination followed by coloring each shape according to color chart with minimal whole space when coloring and 1 vc to color within boundary lines.	Notes Entered: 5/4/2021 9:12:26 AM Notes Last Modified: 5/4/2021 9:12:26 AM Signed: 5/4/2021 D. TA Cosi gned: 5/5/2021 K. MSOTR/L Meets Medicaid Requirements: Yes
05/04/21 In: 12:00PM Out: 12:30PM	Universal Pre-K Classroom	F82 97530x2	Student engaged in fine motor task tracing various shapes with right modified tripod grasp with 1 vc to stay on boundary lines when tracing followed by coloring each shape with 1 vc to slow down to increase motor coordination in right dominant hand. Composed first three letters in first name independently with visual model of rest of letters in first name due to difficulty with formation of letter y with directionality.	Notes Entered: 5/7/2021 11:00:51 AM Notes Last Modified: 5/7/2021 11:00:51 AM Signed: 5/7/2021 D. A Cosi gned: NOT COSIGNED Meets Medicaid Requirements: Yes

Print Parent Signature Log

- * Go to Caseload Maintenance > My Caseload
- * Choose the Enrollment needed, and click Generate Blank Signature Logs for Selected Enrollment
- * On Generate Parent/Guardian Signature Logs, choose month, and click Generate

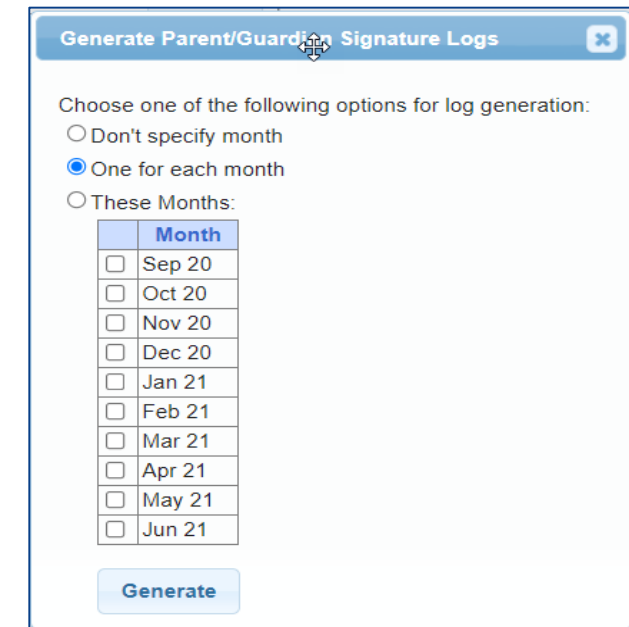


A vertical menu with four items: 'Caseload Maintenance' (with a dropdown arrow), 'My Caseload', 'Prescriptions for Caseload', and 'Create New Order'. A mouse cursor is pointing at 'My Caseload'.



The 'My Caseload' page includes a 'Filter By' section with 'Provider' and 'Session' dropdowns, and a 'Search' button. Below is a table with columns: Status, ESID, Last Name, First Name, County, Provider, District, Type, From, To, Service, Assigned, Attendances, and Defaults. Two rows are visible, both for 'COLUMBIA' county. A red arrow points to the 'Generate Blank Signature Logs for Selected Enrollments' button at the bottom.

Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned	Attendances	Defaults
<input checked="" type="checkbox"/>	CBF	3 C	2	COLUMBIA		Taconic Hills CSD	CBRS	04/12/21	06/24/21	OT 2x30 Individual	YES	Attendances	Defaults
<input type="checkbox"/>	CBF	3 J		COLUMBIA		KINDERHOOK CSD	CBRS	09/08/20	06/24/21	OT 2x30 Individual	YES	Attendances	Defaults



The dialog box 'Generate Parent/Guardian Signature Logs' contains radio buttons for log generation options: 'Don't specify month', 'One for each month' (selected), and 'These Months:'. Below is a table of months from Sep 20 to Jun 21, each with a checkbox. A 'Generate' button is at the bottom.

Month
<input type="checkbox"/> Sep 20
<input type="checkbox"/> Oct 20
<input type="checkbox"/> Nov 20
<input type="checkbox"/> Dec 20
<input type="checkbox"/> Jan 21
<input type="checkbox"/> Feb 21
<input type="checkbox"/> Mar 21
<input type="checkbox"/> Apr 21
<input type="checkbox"/> May 21
<input type="checkbox"/> Jun 21

Therapist Signature _____ **Date:** _____

View Child Activities by Therapist Report

- * Go to Reports > View Child Activities by Therapist
- * The filters allow you to specify criteria for the report.
 - * Select Service Provider
 - * Select Therapist
 - * Select School Year
 - * Select Enrollment
 - * Select 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 Report

Child	ServiceProvider	County	ESID	EnrollmentDescription	Activity	AttendanceType	Date	Start Time	End Time	Duration	SessionsToBill
H 2	H	COLUMBIA	CBF	CBRS (OT) 9160-A 1x30 - I - (07/06/2020-08/14/2020)	Attendance		7/06/2020	12:30 PM	1:00 PM	30	1.00
H 2	H	COLUMBIA	CBF	CBRS (OT) 9160-A 1x30 - I - (07/06/2020-08/14/2020)	Child Absent		7/08/2020	1:00 PM	1:30 PM	30	
H 2	H	COLUMBIA	CBF	CBRS (OT) 9160-A 1x30 - I - (07/06/2020-08/14/2020)	Attendance	Provided Treatment Session	7/13/2020	12:55 PM	1:25 PM	30	1.00
H 2	H	COLUMBIA	CBF	CBRS (OT) 9160-A 1x30 - I - (07/06/2020-08/14/2020)	Attendance	Provided Treatment Session	7/15/2020	1:00 PM	1:30 PM	30	1.00
H 2	H	COLUMBIA	CBF	CBRS (OT) 9160-A 1x30 - I - (07/06/2020-08/14/2020)	Attendance	Provided Treatment Session	7/20/2020	1:00 PM	1:30 PM	30	1.00
H 2	H	COLUMBIA	CBF	CBRS (OT) 9160-A 1x30 - I - (07/06/2020-08/14/2020)	Attendance	Provided Treatment Session	7/27/2020	1:00 PM	1:30 PM	30	1.00

Upcoming Webinars

- * **Billing (Agencies & Independents Using an Outside System) –**
- * **Aug 9 @2:30 PM**
- * <https://attendee.gotowebinar.com/register/3955043794564004368>

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:**
 - * **Entering Weekly Attendance**
* <http://support.cpseportal.com/kb/a38/entering-weekly-attendance.aspx>
 - * **Review and Sign Attendance**
* <http://support.cpseportal.com/kb/a148/review-and-sign-attendance.aspx?KBSearchID=16970>
 - * **Move Attendance Between Enrollments**
* <http://support.cpseportal.com/kb/a53/move-attendance-between-enrollments.aspx?KBSearchID=16924>
 - * **Child Treatment Log**
* <http://support.cpseportal.com/kb/a28/child-treatment-log.aspx?KBSearchID=16959>
 - * **Parent/Caregiver Signature Logs (blank logs for counties)**
* <http://support.cpseportal.com/kb/a69/parent-caregiver-signature-logs.aspx?KBSearchID=16964>
 - * **Therapist Activity Report**
* <http://support.cpseportal.com/kb/a27/therapist-activity.aspx?KBSearchID=16966>
- * Search for help in our **Knowledge Base:** <http://support.cpseportal.com/main/default.aspx>
- * Email the **CPSE Portal Support Team:** support@CPSEPortal.com