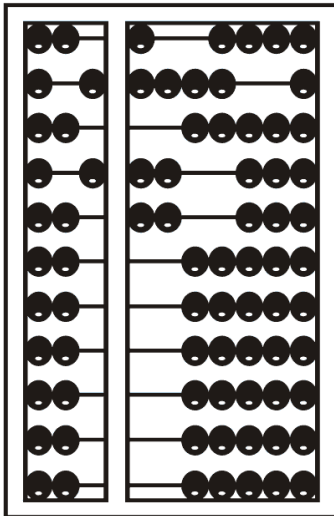


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# CPSE Portal Case Management for Agency Service Providers

# TOPICS COVERED

- \* What are Unmatched Children and Enrollments
  - \* Enrollments and ESID #'s.
- \* Prescriptions
  - \* Creating Digital Orders (SLPs)
  - \* Uploading Prescriptions (OT, PT & PSY)
- \* Reports
  - \* Enrollment Lookup Report
  - \* How to Find an ESID #
  - \* My Caseload
- \* Closing
  - \* Knowledge Base Links
  - \* Upcoming Webinars
  - \* Closing Remarks



# What are Unmatched Children and Unmatched Enrollments

# 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, your agency can create a temporary child and temporary enrollment records.
  - \* These are created when the County is delayed in entering data.
  - \* Your 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, then you can “match” the temporary records to the County created record. When matching the records, any data entered for the temporary record is moved over to the County created record 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 #.

# Enrollment and ESID #

- \* The enrollment should correspond to a unique approved service on the IEP.
- \* There will be enrollments for:
  - \* Different Service Types (OT vs PT vs ST)
  - \* Different frequencies (1x30 vs 1x45 vs 2x30)
  - \* Individual vs Group (if the CPSE determines 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, or the STAC ID #..



# Prescriptions

# Creating Digital Orders (SLP's)

- \* Go to **Caseload Maintenance** -> **Prescriptions for Caseload**
  - \* Use this option for initial prescriptions.
- \* Go to **Caseload Maintenance** -> **Create New Order**
  - \* Use this option for subsequent prescriptions:
    - \* Example: when there is a change in service and a previous prescription already exists.

<http://support.cpseportal.com/kb/a160/creating-digital-speech-recommendations-slps.aspx?KBSearchID=19946>



# Prescriptions for Caseload (SLPs)

- \* Go to **Caseload Maintenance** -> **Prescriptions for Caseload**
- \* Here you will find:
  - \* A list of children on your caseload,
  - \* Status of your prescription,
  - \* Existing Speech Recommendations and enrollments that need an RX.
- \* If you click on “View”, you will be able to view or print the digital speech recommendation.

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



# Create Digital Order

- \* Go to **Caseload Maintenance -> Create New Order**
- \* Search for child, and choose “Select”.

### Create Digital Order

Child Lookup

[\[ Hide Advanced Search options \]](#)

School Year

County

Provider

District

Child Number

STAC ID

Electronic Service ID

	Child Number	Last Name	First Name	DOB	CIN	District	County	Match Status	
<input type="button" value="Select"/>	C53000131269			5/6/2015		Schenectady	SCHENECTADY	County Record	<a href="#">Details</a>

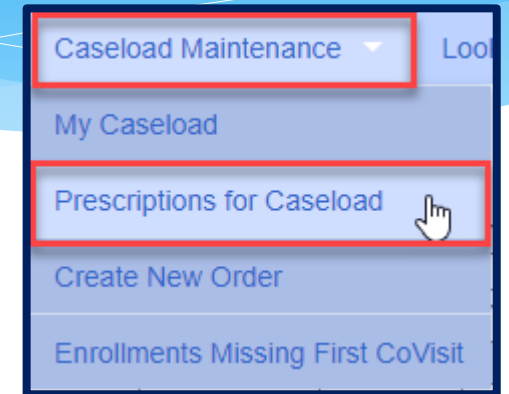
# Create Digital Order

- \* Enter your Date Range, ICD Code, and click “*Preview and Sign*”.
- \* This will then ask for your PIN #.

The screenshot shows a web form titled "Create Digital Order". At the top, there is a "Child Lookup" section with a blurred name field, "County: SCHENECTADY", "District: Schenectady", "DOB: 5/6/2015", and a "Redo Search" button. Below this is a section for "Create recommendation for Speech Services" with a dropdown menu. The "Prescription effective date range" section is highlighted with a red box and contains three radio button options: "Applies to entire school year" (selected) with a "2021 - 2022" dropdown, "Applies to specific school year / session" with a "2021 - 2022 Winter" dropdown, and "Applies to specific date range" with two empty date input fields. The "Reason for Services" section is also highlighted with a red box and contains an "ICD" search field with the placeholder "Search by code or description...", a "Reason" text input field, and a "Preview and Sign" button at the bottom, which is also highlighted with a red box.

# Uploading Prescriptions – OT, PT and PSY

- \* Go to **Caseload Maintenance** -> **Prescriptions for Caseload**
- \* This will bring up your caseload.
- \* This is a 2 step process:
  - \* First, enter prescription information,
  - \* Second, upload the prescription image.



## Prescriptions / Written Orders for Caseload

Filter By

Provider: A

Session: 2021 - 2022 Winter

Search

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image
RS2122W0001572			12/6/2021	6/24/2022	OT 1x30 Individual	MISSING	Enter Rx Info	Upload Rx Image
CPSECBRS0000118175			3/21/2022	6/24/2022	OT 1x30 Individual	MISSING	Enter Rx Info	Upload Rx Image
RS2122W0001529			9/8/2021	6/24/2022	OT 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image
CBRS2122W0001937			12/6/2021	6/24/2022	OT 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image

Step 1

Step 2

# Prescription Entry & Uploading Image

Step 1 – Enter Prescription Entry information

Click “Preview”, “Save & Done”

<http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=19947>

Step 2 – Upload Prescription Image

Click “Save”

The screenshot shows the 'Manage Prescription Entry' form. Red boxes highlight the following fields: 'Order Type' dropdown, 'Provider' dropdown, 'Ordering Provider NPI' text box, 'Prescription effective date range' section (including radio buttons for 'Applies to entire school year', 'Applies to specific school year / session', and 'Applies to specific date range'), 'Reason for Services' section (including 'ICD' dropdown and 'Reason' text area), 'Frequency' section (including 'Per IEP' radio button and 'Specific' radio button), and the 'No eligible enrollments found' message at the bottom. The 'Preview' button is also visible.

The screenshot shows the 'Manage Prescription File' form. Red boxes highlight the following fields: 'Choose File' button, 'Provider' dropdown, 'School Year' dropdown (set to '2021 - 2022'), 'Description' text area, 'Ordering Provider Information (optional)' section (including 'Ordering Provider NPI' text box and 'Date Signed' text box), and the 'No eligible orders found' message at the bottom. The 'Save' button is also visible.



# Reports

# Enrollment Lookup Report

- \* A report of all enrollments.
- \* Go to **Lookup -> Enrollment Lookup:**
  - \* View attendances on an enrollment,
  - \* A report can be exported to Excel.

Enrollments

School Year Session2021 - 2022 SummerCountyProvider

☒ CBRS☒ RS☒ SEIT☒ CB

Search

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	CB2122S0022336			2/16/2016				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		Attendances
	CBRS2122S0020430			2/16/2016				CBRS	ST	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		Attendances
UnMatched				4/11/2017				RS	PT	7/12/2021	8/20/2021	2x30	I			0.00	0.00	6	6		Attendances
UnMatched				4/11/2017				RS	ST	7/12/2021	8/20/2021	1x30	I			0.00	0.00	6	6		Attendances
	CB2122S0021911			4/11/2017				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		Attendances
	CBRS2122S0020788			4/11/2017				CBRS	ST	7/12/2021	8/20/2021	1x30	I	9100-A		0.00	3.00	6	6		Attendances
	CBRS2122S0020789			4/11/2017				CBRS	PT	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		Attendances
	CBRS2122S0020790			4/11/2017				CBRS	HLT	7/12/2021	8/20/2021	5x15	I	9100-A		0.00	0.00	6	6		Attendances

# How to Find an ESID #

\* You can also go to **Lookup -> Enrollment Lookup**

## Enrollments

School Year Session 2021 - 2022 Summer County 
☒ CBRS
☒ RS
☒ SEIT
☒ CB

Provider

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	CB2122S0022336			2/16/2016				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		Attendances
	CBRS2122S0020430			2/16/2016				CBRS	ST	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		Attendances
UnMatched				4/11/2017				RS	PT	7/12/2021	8/20/2021	2x30	I			0.00	0.00	6	6		Attendances
UnMatched				4/11/2017				RS	ST	7/12/2021	8/20/2021	1x30	I			0.00	0.00	6	6		Attendances
	CB2122S0021911			4/11/2017				CB		7/12/2021	8/20/2021	5 hrs/day		9100-A	N	5537.00	30.00	6	6		Attendances
	CBRS2122S0020788			4/11/2017				CBRS	ST	7/12/2021	8/20/2021	1x30	I	9100-A		0.00	3.00	6	6		Attendances
	CBRS2122S0020789			4/11/2017				CBRS	PT	7/12/2021	8/20/2021	2x30	I	9100-A		0.00	4.00	6	6		Attendances
	CBRS2122S0020790	ALI		4/11/2017				CBRS	HLT	7/12/2021	8/20/2021	5x15	I	9100-A		0.00	0.00	6	6		Attendances

# My Caseload

- \* Go to **Caseload Maintenance** -> **My Caseload**
- \* You can also see all of the attendances that you have entered for each child.



## My Caseload

Filter By

Provider:  Session: 2021 - 2022 Winter

	Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned		
<input type="checkbox"/>		RS2122W0001572			COLUMBIA		NEW LEBANON CSD	RS	12/06/21	06/24/22	OT 1x30 Individual	YES	Attendances	Defaults
<input type="checkbox"/>		CPSECBRS0000118175			Albany		RAVENA-COEYMANS-SELKIRK CSD	CBRS	03/21/22	06/24/22	OT 1x30 Individual	YES	Attendances	Defaults
<input type="checkbox"/>		RS2122W0001529			COLUMBIA		NEW LEBANON CSD	RS	09/08/21	06/24/22	OT 2x30 Individual	YES	Attendances	Defaults
<input type="checkbox"/>		CBRS2122W0001937			COLUMBIA		GERMANTOWN CSD	CBRS	12/06/21	06/24/22	OT 2x30 Individual	YES	Attendances	Defaults

Excel

Generate Blank Signature Logs for Selected Enrollments

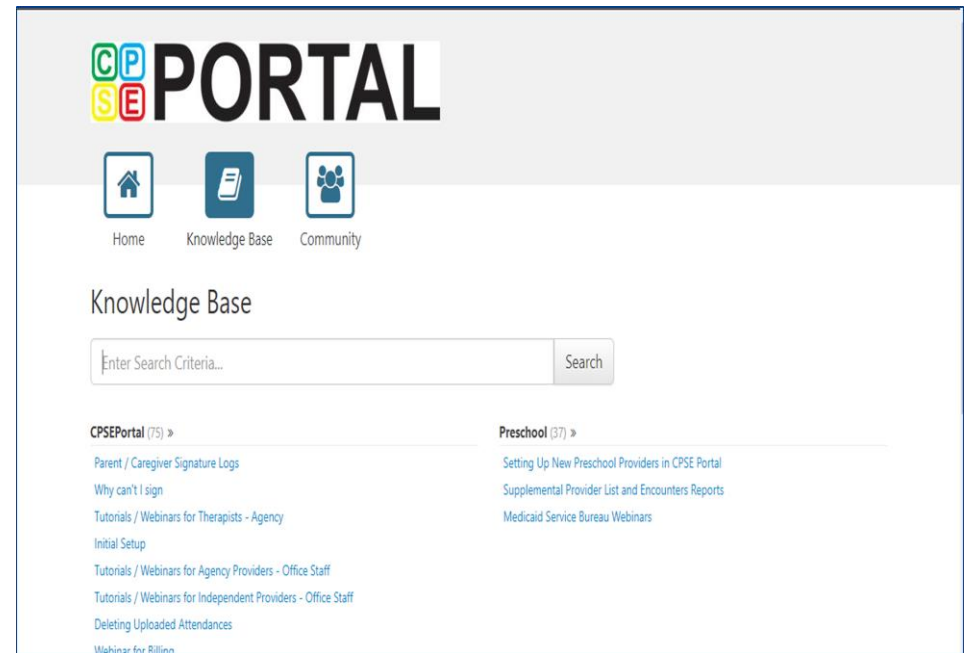




# Closing

# Portal Training – Knowledge Base

- \* The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Portal support.
- \* You can simply click the Knowledge Base tab in the Portal or you can go to:
- \* <http://support.cpseportal.com/kb>



# Knowledge Base Links

- \* Creating Digital Speech Recommendations (SLPs):
  - \* <http://support.cpseportal.com/kb/a160/creating-digital-speech-recommendations-slps.aspx?KBSearchID=19946>
- \* Uploading & Troubleshooting Prescription Documentation:
  - \* <http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=19947>

# Upcoming Webinars

## CPSE Portal Session Notes:

- Tuesday, June 14, 2022 @ 10:00AM  
<https://attendee.gotowebinar.com/register/6770111329202654990>
- Friday, June 17, 2022 @ 10:00AM  
<https://attendee.gotowebinar.com/register/7434706734565390091>
- Friday, June 17, 2022 @ 4:00PM  
<https://attendee.gotowebinar.com/register/9067654125138351115>
- Tuesday, June 21, 2022 @ 10:00AM  
<https://attendee.gotowebinar.com/register/3675643604966749452>

# Upcoming Webinars

## **CPSE Portal Session Notes:**

- Tuesday, June 21, 2022 @ 2:00PM

<https://attendee.gotowebinar.com/register/1750392147661269772>

## **Topics Covered During This Webinar:**

- Recap Entering/Signing Classroom Attendance
- Attendance Entry Record
- Signing Attendance/Review & Sign
- Co-Signing Session Notes/Attendance
- Un-signing Attendance/Making Corrections After Signing
- Print Child Treatment Log
- Print Parent Signature Log

# Closing remarks

- \* CPSE Portal Address (you may want to bookmark):  
<https://www.cpseportal.com>
- \* In addition to the Portal Knowledge base, our Helpdesk is available through email at [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
  - \* When sending an email:
    - \* Do not use child's name
    - \* Use STAC ID # or ESID #
    - \* Include your county, and info needed