

## CPSE Portal Agency Case Management

7/15/2022 & 7/18/2022

### Questions & Answers

Topic/Category	
<b>Q</b>	You must match unmatched children and their unmatched enrollments separately? Two steps, not 1?
<b>A</b>	YES. You will match the Unmatched Child first, and then match all of the Unmatched Enrollments.
<b>Q</b>	Will it match if the dates to and from you entered does not match what the County inputted
<b>A</b>	You will go to <i>Caseload Maintenance -&gt; Add/Edit Unmatched Enrollments</i> , and Edit the child and change the dates to match the County. You can also contact the County to verify that their dates are correct if you were given different dates.
<b>Q</b>	Do you have to wait for the therapist to add all notes and bill before you remove the therapist if we assigning a new therapist?
<b>A</b>	Before removing a therapist, you want to make sure that all notes are entered, and signed. If there are any issues after you remove the therapist, then you will need to add the therapist back to the child so the therapist can correct notes.
<b>Q</b>	What if you have two therapist servicing same student?
<b>A</b>	You can assign as many therapists as needed to one child. Remember to also assign the supervisor if there is one, as they will need to co-sign notes.
<b>Q</b>	Can you still bill the county with an unmatched enrollment?
<b>A</b>	NO. You cannot bill the county on an unmatched child or enrollment.
<b>Q</b>	What does CBRS stand for?
<b>A</b>	CBRS are the Center Based Related Services that are included in the child's tuition for a Center Based program.
<b>Q</b>	Do we need to enter a CB enrollment for teacher's classrooms and assign a teacher?
<b>A</b>	YES. This is all covered in the CPSE Portal Center Based Case Management webinar.
<b>Q</b>	I was told you had to create a new child if the child changes school districts.

<b>A</b>	Yes. If your child is changing school districts, you will need to create an unmatched child, and new unmatched records for the new school district.
<b>Q</b>	Just wanted to clarify that if the child is already in the Portal, you don't add them as a new child. You do if they have a new school district?
<b>A</b>	Yes, that is correct.
<b>Q</b>	As billing for agent, to be able to sign attendance for the classroom, I would need to add myself as one of the teachers correct?
<b>A</b>	You will need make yourself an "unknown" service provider, and verify your credentials. You will then be able to take attendance as a billing admin.
<b>Q</b>	Is there a way to call on the phone with a problem?
<b>A</b>	You can request a phone call on your email to <a href="mailto:support@CPSEPortal.com">support@CPSEPortal.com</a> . Please include your phone #, and a good date and time to call you.