SUPERVISION QUICK REFERENCE GUIDE

The process for entering a Supervision Plan is noted below:

1) **Select the Service Provider and Supervisor** (Supervision Plan)
    a. Go to Medicaid or Caseload Maintenance>Supervision>Supervision Plans>Filter>Retrieve
    b. Copy Plans from a Prior Session or Create Plans from Pre-License Plans *(if there are any Plans to copy)*
    c. If there are no Plans from a Prior Session or Pre-License Plans to copy, Select the Service Provider & Supervisor from the respective drop-downs to create the Supervision Plan
    d. Click the ***Details*** Link to assign the child/enrollment to the Supervision Plan

2) **Assign the Enrollment Plan (child & enrollment) to the Supervision Plan** (Service Provider & Supervisor)
    a. Click the ***Details*** Link at the end of the row to assign the child/enrollment to the Supervision Plan
    b. Click the ***"Add a Supervision Plan for an Enrollment"*** button
    c. Select the specific Supervision Plan in the Supervision Plans grid
    d. Select all the children and enrollments that apply to the specific Supervision Plan
    e. Click ***Create Enrollment Supervision Plans*** *button*

3) **Upload the Required Audit Documentation**
    a. Click the *Supervision Documents Tab*
    b. Click *Choose File*
    c. Select *Document Type*
    d. Click *Upload Document* (If you need to upload documentation for a child, you will need to select the specific child from the *"Enrollment Supervision Plan"* Drop-Down.)

4) **Enter the Face-to-Face Meeting Date**
    (Medicaid or Caseload Maintenance>Supervision>Enrollment Needing First Visit)
    a. Filter for County, Provider, School Year Session, Click the *Missing* Radio Button, Click *Retrieve*
    b. Click the *Add Meeting Date* Link at the end of the row
    c. Enter the meeting date and click the *Update* link at the end of the row.