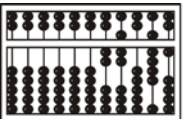


CPSE Portal

Caseload Maintenance



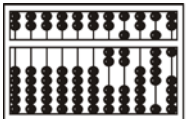
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Webinar Getting Started

CPSE Portal is located at

<https://www.cpseportal.com/>

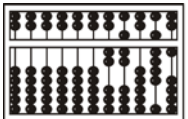


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Webinar Outline

- ▶ Support Resources
- ▶ Child vs. Enrollments
- ▶ Child & Enrollment Lookup & Listing
- ▶ Unmatched Children & Enrollments
- ▶ Rescinded Enrollments
- ▶ Assigning therapists to cases

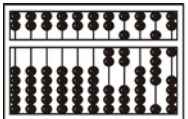


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Resources

- ▶ Email support@CPSEPortal.com
- ▶ CPSE Portal support site <http://support.cpseportal.com>
 - ▶ Knowledge Base Articles
- ▶ Knowledge Base Menu from www.CPSEPortal.com

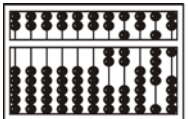


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Child vs Enrollment

- ▶ A child is the person. Name, DOB, etc.
- ▶ The enrollment is the particular service that child is receiving
 - ▶ From Date / To Date
 - ▶ Service Type (OT, PT, ST, etc.) & Individual vs. Group
 - ▶ Frequency (2x30)

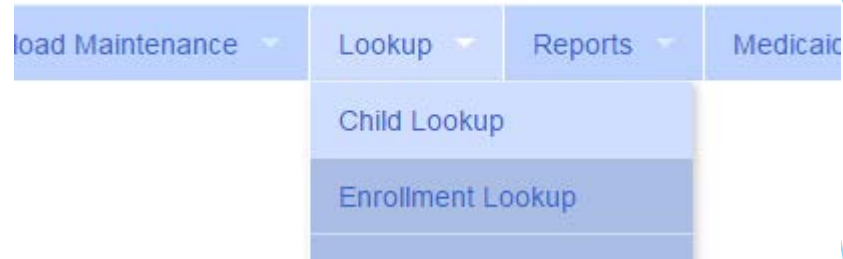


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 **PORTAL**

Child lookup

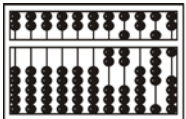
- ▶ Navigate top menu to Lookup->Child Lookup
- ▶ Enter the start of the child's last name and click search
- ▶ Find the child and click details



Child Lookup

Last Name [Search](#) [\[Show Advanced Search options \]](#)

Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	
SCHAFER	FRANCIS	2/11/2010	E23693	East Aurora	ERIE	County Record	Details
SCHAFER	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



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Child Lookup Advanced Search

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

Child Lookup

Last Name [\[Show Advanced Search options \]](#)

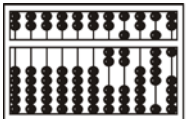


Child Lookup

Last Name [\[Hide Advanced Search options \]](#)
School Year County Provider District STAC ID Electronic Service ID



- ▶ Wildcard searches can be done by using “%” ex. Search “%son” returns Wilson, Sampson, Thompson, etc.



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Enrollment Lookup



- Navigate top menu Lookup->Enrollment Lookup

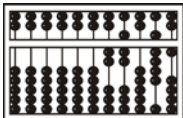
Enrollments

2015 - 2016 Winter ▾ ERIE ▾ ☐ CBRS ☒ RS ☐ SEIT ☐ CB

HIGHER LEARNING, LLC ▾

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

- Select filters and search, can export to Excel



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Using Child Lookup to view enrollments

- ▶ Use child Lookup to find child and click [Details](#) link to see list of enrollments for the child

Child Lookup

Last Name

ash

Search

[Show Advanced Search options]

Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	Details
ASH	SON	12/18/2012	G16760	Frontier	ERIE	County Record	

Child Details (ASH, SON)
DOB: 12/18/2012 Gender: M

Address:

County: ERIE
District: Frontier
Matched?: Y

<< Back to Search Results

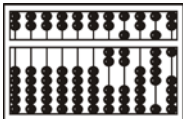
, NY

View Information for School Year: 2015 - 2016 ▼

Enrollments

Strikethrough = The county deleted this enrollment.

Status	School Year	From	To	ESID	Provider	Enrollment	Service	Frequency	Individual Or Group	
	2015 - 2016 Winter	12/1/2015	6/30/2016	RS1516W0082349	HIGHER LEARNING, LLC	RS	ST	4x30	I	Attendances
	2015 - 2016 Winter	10/21/2015	11/30/2015	RS1516W0081747	HIGHER LEARNING, LLC	RS	ST	3x30	I	Attendances
	2015 - 2016 Winter	10/21/2015	6/30/2016	RS1516W0081748	HIGHER LEARNING, LLC	RS	OT	2x30	I	Attendances
	2015 - 2016 Winter	10/21/2015	6/30/2016	RS1516W0081749	HIGHER LEARNING, LLC	RS	PT	1x30	I	Attendances
	2015 - 2016 Winter	10/21/2015	6/30/2016	RS1516W0081750	HIGHER LEARNING, LLC	RS	COR	1x30 MONTHLY	I	Attendances



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View Attendance from Enrollment List

- ▶ Use Child lookup to see Enrollments for a child
- ▶ Click [Attendance](#) Link to view attendance for enrollment

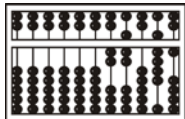
enrollment - The county deleted this enrollment.

Frequency	Individual Or Group	
4x30	I	Attendances
3x30	I	Attendances

Attendance List

Child Last Name ASH **Child First Name** SON **Electronic Service ID** RS1516W0081749 **Enrollment Type** RS **RS Type** PT **County** ERIE
Provider HIGHER LEARNING, LLC **District** Frontier

Service Date	Time In	Time Out	# Sessions	Minutes Per Session	Service Provider	Setting	Individual Or Group	Signed Date	Co-Signed Date	Voucher #
2/5/2016	8:00 AM	8:30 AM	1.00	30	JULE SCHMITZ	Daycare	I	2/5/2016	2/5/2016	RS160321025802
2/26/2016	8:00 AM	8:30 AM	1.00	30	JULE SCHMITZ	Daycare	I	2/26/2016	2/26/2016	RS160321025802
3/4/2016	8:15 AM	8:45 AM	1.00	30	JULE SCHMITZ	Daycare	I	3/4/2016	3/4/2016	RS160425094050
3/11/2016	8:00 AM	8:30 AM	1.00	30	JULE SCHMITZ	Daycare	I	3/11/2016	3/11/2016	RS160425094050
3/18/2016	8:00 AM	8:30 AM	1.00	30	JULE SCHMITZ	Daycare	I	3/21/2016	3/21/2016	RS160425094050
4/1/2016	8:00 AM	8:30 AM	1.00	30	JULE SCHMITZ	Daycare	I	4/1/2016	4/1/2016	
4/8/2016	8:00 AM	8:30 AM	1.00	30	JULE SCHMITZ	Home	I	4/9/2016	4/9/2016	
4/15/2016	8:15 AM	8:45 AM	1.00	30	JULE SCHMITZ	Daycare	I	4/15/2016	4/15/2016	
4/22/2016	8:00 AM	8:30 AM	1.00	30	JULE SCHMITZ	Daycare	I	4/22/2016	4/22/2016	
5/6/2016	8:00 AM	8:30 AM	1.00	30	JULE SCHMITZ	Daycare	I	5/6/2016	5/6/2016	



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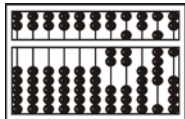
Attendance List

- For any enrollment on the Caseload list, click the [attendance](#) link column to view all the attendances recorded

Attendance List

Child Last Name BURCH **Child First Name** BRANDEN **Electronic Service ID** RS1516W0080738 **Enrollment Type** RS **RS Type** ST
County ERIE **Provider** HIGHER LEARNING, LLC **District** Hamburg

Service Date	Time In	Time Out	# Sessions	Minutes Per Session	Service Provider	Setting	Individual Or Group	Signed Date	Co-Signed Date	Voucher #
9/29/2015	11:00 AM	11:30 AM	1.00	30	CECILA CUELLAR	Home	I	10/2/2015	10/2/2015	RS151028105015
10/1/2015	12:05 PM	12:35 PM	1.00	30	CECILA CUELLAR	Home	I	10/2/2015	10/2/2015	RS151209034428
10/6/2015	11:45 AM	12:15 PM	1.00	30	CECILA CUELLAR	Home	I	10/10/2015	10/10/2015	RS151209034428
10/8/2015	12:15 PM	12:45 PM	1.00	30	CECILA CUELLAR	Home	I	10/10/2015	10/10/2015	RS151209034428
10/13/2015	11:40 AM	12:10 PM	1.00	30	CECILA CUELLAR	Home	I	11/2/2015	11/2/2015	RS151209034428
10/15/2015	12:05 PM	12:35 PM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
10/20/2015	11:15 AM	11:45 AM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
10/22/2015	11:10 AM	11:40 AM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
10/27/2015	11:35 AM	12:05 PM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
10/29/2015	12:05 PM	12:35 PM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
11/3/2015	11:35 AM	12:05 PM	1.00	30	CECILA CUELLAR	Home	I	12/3/2015	12/3/2015	RS151223092631
11/5/2015	12:15 PM	12:45 PM	1.00	30	CECILA CUELLAR	Home	I	12/3/2015	12/3/2015	RS151223092631

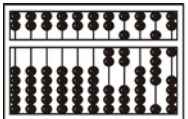


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Enrollment & ESID

- ▶ 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
- ▶ Do not email child names, use the ESID



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CPSE PORTAL

How to find ESID

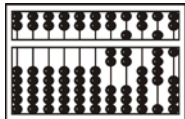
- Use Child Lookup to view enrollments for a child

View Information for School Year: 2015 - 2016 ▼

Enrollments								
Status	School Year	From	To	ESID	Provider	Enrollment	Service	Frequency
	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 ▼		<input type="checkbox"/> CBRS		<input type="button" value="Search"/>								
HIGHER LEARNING, LLC ▼				<input checked="" type="checkbox"/> RS										
				<input type="checkbox"/> SEIT										
				<input type="checkbox"/> CB										
Status	ESID	Last Name	First Name	County	Provider	District	Enrollment Type	RS Type	Start	End	Frequency	Individual Or Group	Rate	Attendances
	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
<input type="button" value="Excel"/>														



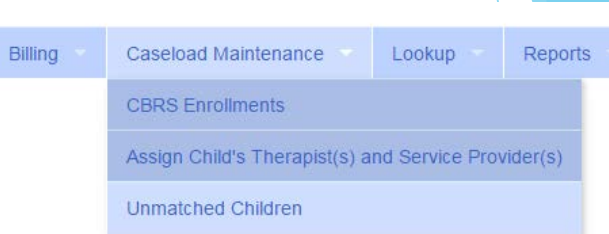
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Unmatched Children and Enrollments

- ▶ 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

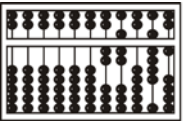
Unmatched Children



- ▶ Navigate top menu to Caseload Maintenance->Unmatched Children

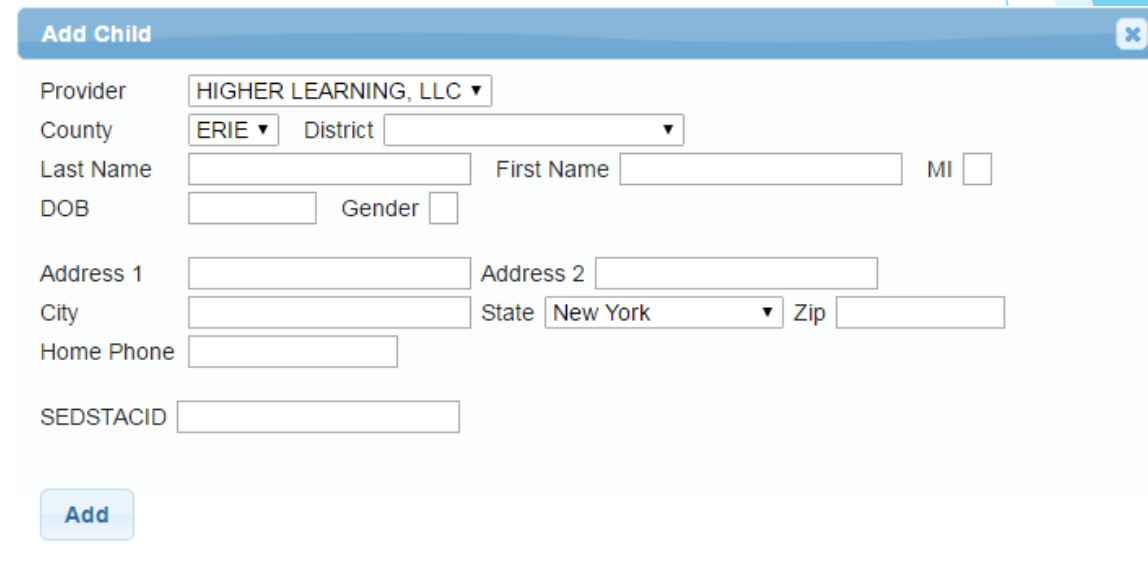
Unmatched Children [Add Child](#)

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

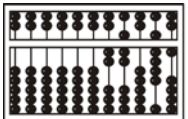
- ▶ Click Add Child button on Unmatched Children Screen
- ▶ Enter in the information
- ▶ Required fields
 - ▶ County
 - ▶ District
 - ▶ Last Name
 - ▶ First Name
 - ▶ DOB
 - ▶ Gender
- ▶ All other fields optional



The screenshot shows a web form titled "Add Child" with a close button (X) in the top right corner. The form contains the following fields:

- Provider: A dropdown menu showing "HIGHER LEARNING, LLC".
- County: A dropdown menu showing "ERIE".
- District: A dropdown menu.
- Last Name: A text input field.
- First Name: A text input field.
- MI: A checkbox.
- DOB: A text input field.
- Gender: A dropdown menu.
- Address 1: A text input field.
- Address 2: A text input field.
- City: A text input field.
- State: A dropdown menu showing "New York".
- Zip: A text input field.
- Home Phone: A text input field.
- SEDSTACID: A text input field.

At the bottom of the form is a blue button labeled "Add".



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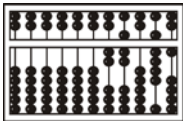
Editing an Unmatched Child

- ▶ Click the Edit Button on the row

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

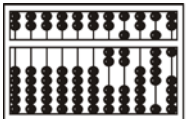
- ▶ You can enter Name, DOB and District
- ▶ Click Update to Save

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

- ▶ 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



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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

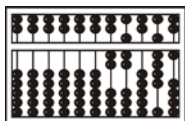
- ▶ Enter your data on the blank row and click Add

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	



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**CP
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Adding Enrollments from Add/Edit Unmatched Enrollments


- ▶ First search for the child
- ▶ Click Select for the child

Unmatched Enrollments

Last Name

[Search](#)

[\[Show Ad](#)



	Last Name	First Name	DOB	SED STAC ID	District
Select	SMITH	SANFORD	9/16/2012	G04764	Cleveland H

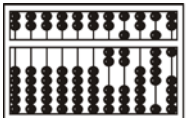
- ▶ Enter your data on the blank row and click Add

Unmatched Enrollments

SMITH, SANFORD County: **ERIE** District: **Cleveland Hill** DOB: **9/16/2012**

[Redo Search](#)

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan	
HIGHER LEARNING, LLC ▼	▼			▼	▼	▼			Weekly ▼	Add



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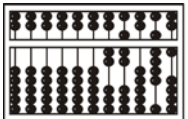
C P S E PORTAL

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



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C P
S E **PORTAL**

Matching Children

- ▶ Items 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

Unmatched Children

Add Child

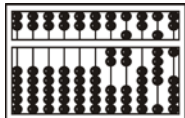
Last Name	First Name	MI	From	County	District	Address1	City	State	Zip	HomePhone	Enrollments	Attempt Match	Edit	Delete
BLUM	MERIL		3/24/2012	ERIE	Frontier			NY						

- ▶ Or Attempt Child Match from View Unmatched Enrollments

Unmatched Enrollments

Retrieve

County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description	Attempt Child Match	Delete
ERIE	BLUM	MERIL	03/24/12	201516	04/06/16	06/30/16	RS	PT	1x30	Attendances	



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CPE PORTAL

Matching Children

Match Child Against County-Imported Child

Current Unmatched Child:

BLUM, MERIL County: **ERIE** District: **Frontier** DOB: **3/24/2012**

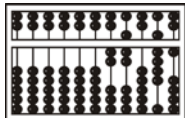
Potential Matches:

DOB To Match

Showing children matching the DOB, and with the same first letters ("BLU") in their last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	BLUM	MERYL		3/24/2012	ERIE	Frontier	2250 STATE RTE 32		NY		

- ▶ 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



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**CP
SE** PORTAL

Confirming your Child Match

- ▶ Click Select to choose the Count 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

DOB to match: [SELECT] Search

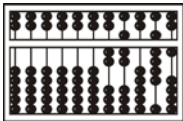
Showing children matching the DOB, and with the same first [3] letters ("BLU") in their last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	BLUM	MERYL		3/24/2012	ERIE	Frontier	2250 STATE RTE 32		NY		

WARNING: By clicking the button below, you are combining these two children (including any associated data - not limited to: enrollments, attendances, medicaid consents, medicaid eligibility, IEPs, log notes, scripts/orders). Make sure the match is correct. This cannot be undone.

BLUM, MERIL (3/24/2012) → BLUM, MERYL (3/24/2012)

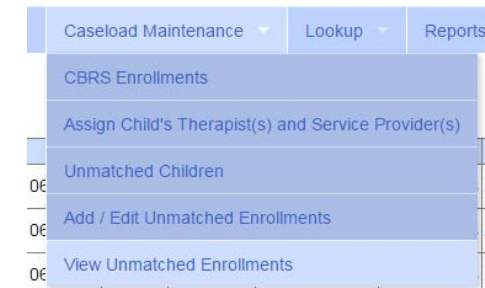
Match!



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Matching Enrollments



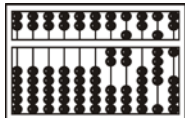
- ▶ Navigate top menu to Caseload Maintenance -> View Unmatched Enrollments

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



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CP
SE PORTAL

Matching Enrollments to County Created entries

Match Enrollment Against County-Imported Enrollment

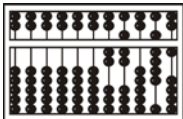
Child:
SHELDON, NEAL County: **ERIE** District: **Orchard Park** DOB: **7/22/2011**

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

- ▶ 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




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Confirm Enrollment Match

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

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

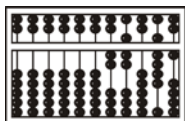
WARNING: By clicking the button below, you are combining these two enrollments (including any associated data - not limited to: attendances, orders/scripts, log notes, therapist/provider assignments). Make sure the match is correct. This cannot be undone.

UNMATCHED ENROLLMENT
(3/30/2016 - 6/24/2016)
1x30



RS1516W0081795
(9/1/2015 - 6/30/2016)
2x30

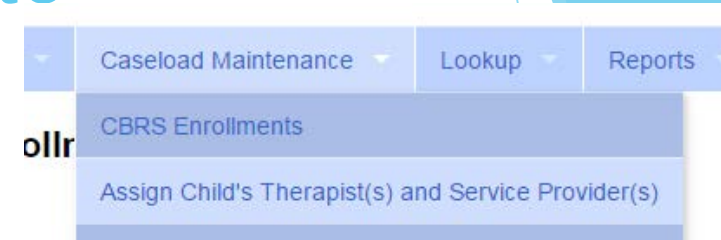
Match!



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 **PORTAL**


Assign Therapists to Enrollments



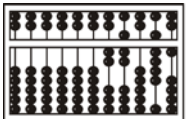
- ▶ Navigate top menu to Caseload Maintenance->Assign Child's Therapist(s) and Service Provider(s)
- ▶ The screen will prompt you to find a child
- ▶ Click Select for the child that you are trying to assign

Select a Child

Last Name [Show Advanced Search options]



	Last Name	First Name	DOB	SED STAC ID	District	County	
Select	JORDAN	JAMEL	8/18/2011	G16715	Hamburg	ERIE	Details



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C P
S E **PORTAL**

Assigning Service Providers to Enrollments

- ▶ The screen will show a list of the selected child's enrollments and assignments.
- ▶ Click Select corresponding to the enrollment that you wish to assign

Select a Child

JORDAN, JAMEL


County: **ERIE**

District: **Hamburg**

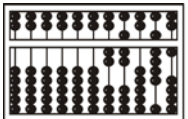
DOB: **8/18/2011**

[Redo Search](#)

Select an Enrollment



	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1516W0082203	RS	ST	2x30	1/13/2016	6/30/2016	I	VALLE, TEMPLE
Select	RS1516W0082204	RS	OT	2x30	1/13/2016	6/30/2016	I	SCHMITT, JULENE



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C P
S E **PORTAL**

Assign Therapist to Enrollment

- ▶ The top grid shows the selected enrollment
- ▶ The bottom left list is currently assigned therapists
- ▶ The bottom right list is available therapists
- ▶ Check the therapist(s) to assign and click "Add Therapists(s)/Service Provider(s)"

Select an Enrollment

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1516W0082203	RS	ST	2x30	1/13/2016	6/30/2016	I	VALLE, TEMPLE
Select	RS1516W0082204	RS	OT	2x30	1/13/2016	6/30/2016	I	SCHMITT, JULENE

Assigned Therapists

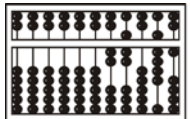
	Last Name	First Name	NPI
<input type="checkbox"/>	SCHMITT	JULENE	1346426004

Remove Therapist

Available Therapists

	Last Name	First Name	NPI
<input type="checkbox"/>	ALBERT	GAYLA	1962689497
<input type="checkbox"/>	BECK	LISABETH	1730256041
<input type="checkbox"/>	BLANKENSHIP	MICHELINE	1770768681
<input checked="" type="checkbox"/>	Blowers	Todd	1003000340
<input type="checkbox"/>	BUCK	MICKIE	1285008326
<input type="checkbox"/>	DELANEY	KATHI	1285874446

Add Therapist(s)/Service Provider(s)

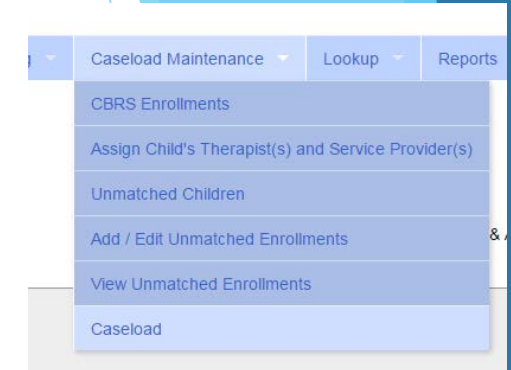


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CP
SE PORTAL

Caseload

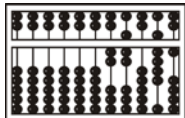
- ▶ Not release yet, but due next week
- ▶ Ability to view all assignments for a therapist



Filter By

Provider: School Year: Person:

Status	Last Name	First Name	ESID	From	To	Enrollment Type	RS Type	Freq	I/G	Provider	County	District	Source	
	Adams	Sara	RS1516W0080334	9/1/2015	6/30/2016	RS	ST	2x30	I	Higher Education Services	ERIE	Evans-Brant(Lake Shore)	ASSIGNED	Attendance
	Brown	Anthony	RS1516W0079702	9/1/2015	6/30/2016	RS	ST	3x30	I	Higher Education Services	ERIE	North Collins	ASSIGNED	Attendance
	Evers	Michael	RS1516W0079817	9/1/2015	6/30/2016	RS	ST	2x30	I	Higher Education Services	ERIE	Evans-Brant(Lake Shore)	ASSIGNED	Attendance
	Murray	Michelle	RS1516W0081743	10/26/2015	6/30/2016	RS	ST	2x30	I	Higher Education Services	ERIE	Hamburg	ASSIGNED	Attendance



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**CP
SE** PORTAL

Assigning cases to a Therapist

- ▶ Clicking the Add New Assignment on Caseload screen takes you to new screen
- ▶ This screen allows you to see all children for a particular service type (or search by name)
- ▶ Click all the check boxes for all the assignments and click Assign Selected button

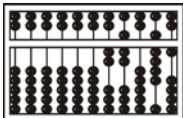
Assign Cases To Person

Filter By...

Enrollment Type: (Any Enrollment Type) Service Type: OT Last Name:

	Status	Last Name	First Name	ESID	From	To	Enrollment Type	RS Type	Freq	I/G	Provider	County	District	
<input type="checkbox"/>				RS1516W0082913	3/9/2016	6/30/2016	RS	OT	3.00x 30 WEEKLY	I		ERIE	Hamburg	Attendance
<input type="checkbox"/>				RS1516W0078401	9/1/2015	10/31/2015	RS	OT	2.00x 30 WEEKLY	I		ERIE	Frontier	Attendance
<input checked="" type="checkbox"/>				RS1516W0079715	9/1/2015	6/30/2016	RS	OT	2.00x 30 WEEKLY	I		ERIE	Orchard Park	Attendance
<input type="checkbox"/>				RS1516W0079840	9/1/2015	6/30/2016	RS	OT	2.00x 30 WEEKLY	I		ERIE	Frontier	Attendance
<input type="checkbox"/>				RS1516W0081258	9/25/2015	6/30/2016	RS	OT	1.00x 30 WEEKLY	I		ERIE	Lancaster	Attendance

Assign Selected

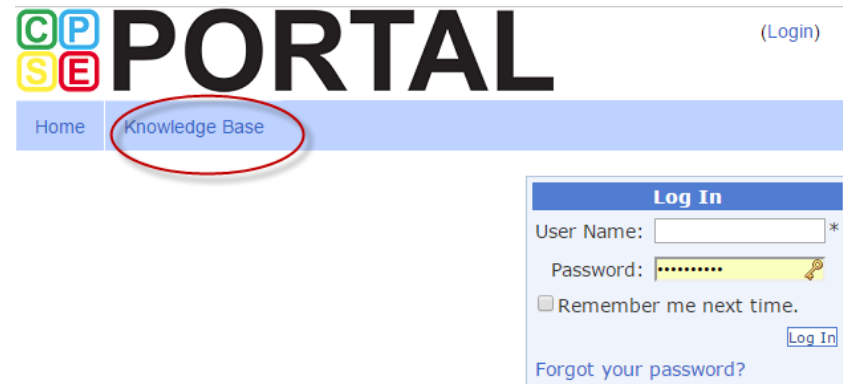


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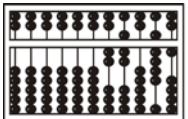
CPE PORTAL

Additional Information

- ▶ Email support@CPSEPortal.com
- ▶ CPSE Portal support site <http://support.cpseportal.com>
 - ▶ Knowledge Base Articles
- ▶ Knowledge Base Menu from www.CPSEPortal.com



The screenshot shows the CPSE Portal website. The logo "CPSE PORTAL" is at the top left, with "CPSE" in colored squares and "PORTAL" in large black letters. To the right of the logo is a "(Login)" link. Below the logo is a navigation bar with two buttons: "Home" and "Knowledge Base". The "Knowledge Base" button is highlighted with a red oval. To the right of the navigation bar is a "Log In" form. The form has a blue header with the text "Log In". It contains two input fields: "User Name:" followed by a text box with an asterisk, and "Password:" followed by a password box with a key icon. Below the password box is a checkbox labeled "Remember me next time." and a "Log In" button. At the bottom of the form is a link that says "Forgot your password?".



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CPSE PORTAL