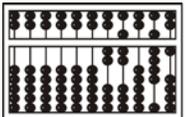


CPSE Portal

Caseload Maintenance



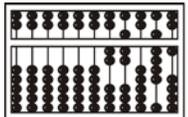
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Webinar Getting Started

CPSE Portal is located at

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

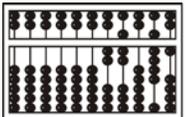


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Webinar Outline

- ▶ Support Resources
- ▶ Creating Classrooms
- ▶ Assigning Teachers to classrooms
- ▶ Assigning Children to classrooms
- ▶ Adding therapy services for tuition based children

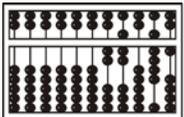


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Resources

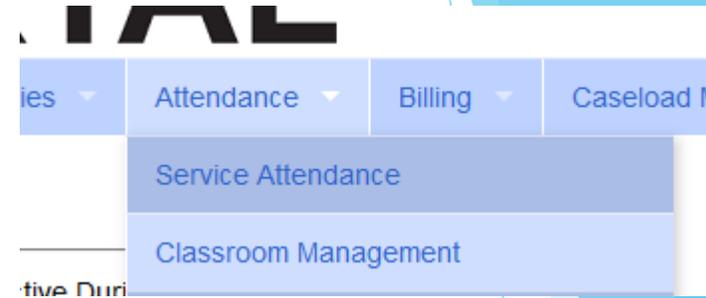
- ▶ Email support@CPSEPortal.com
- ▶ CPSE Portal support site <http://support.cpseportal.com>
 - ▶ Knowledge Base Articles
- ▶ Knowledge Base Menu from www.CPSEPortal.com
- ▶ PDF versions of webinars and recorded webinars available on Knowledge Base (search "Webinar")



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Classroom Management



- ▶ Navigate top menu to Attendance->Classroom Management

[+ Expand Filter] 

	Class	Description	School Year	Program	# Students	# Teachers	# Aides			
Attendance	Room 107 (12:1:2)	Klingenberg	2015 - 2016 Winter	9115	0	1	0	Edit Classroom	Assign Children	
Attendance	Room 109 (10:1:1)	Silverstein	2015 - 2016 Winter	9165	0	1	0	Edit Classroom	Assign Children	
Attendance	Room 112 (12:1:1)	Austin	2015 - 2016 Winter	9160	0	1	0	Edit Classroom	Assign Children	
Attendance	Room 201 (15:1:1)	Caruso	2015 - 2016 Winter	9103	0	1	0	Edit Classroom	Assign Children	

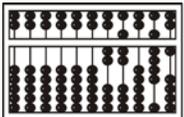
 [Create New Classroom](#)

- ▶ Click the Expand Filter to limit list
- ▶ Click Collapse Filter to hide filters

[- Collapse Filter] 

Filter Classrooms

Session: Program: Active During (Select Month & Year):



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Adding a Classroom

- ▶ From Classroom Management page, click Create New Classroom
- ▶ Fields
 - ▶ School Year / Session
 - ▶ Program - SED Program Code
 - ▶ Name - any name to identify classroom
 - ▶ Description (optional)
 - ▶ Ratio (optional)

Classroom Information

School Year:

2015 - 2016 Winter

Program:

9165

[more/less](#)

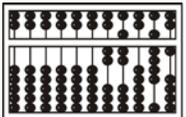
Name:

Description:

Students: # Teachers: # Aides:

[\[+ Assign Teachers/Aides \]](#)

Create Classroom



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Assigning Teachers to the Classroom

- ▶ Click Assign Teachers/Aides link on Classroom information page
- ▶ Select people from the left list, choose role and click Assign

Students: # Teachers: # Aides:

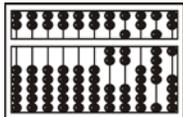
[+ Assign Teachers/Aides] ←

[- Hide Assignments]

Only Include in Unassigned List if Discipline Code is TEACH or AIDE? (will reload lists)

Assigned to Classroom		Not Assigned			
No people currently assigned to classroom.		<input type="checkbox"/>	ABERNATHY	EHTEL	Teacher
		<input type="checkbox"/>	ADAMSON	ELEANORA	Teacher
		<input type="checkbox"/>	ADDISON	DUNG	Teacher
		<input type="checkbox"/>	ADLER	EDEN	Teacher
		<input type="checkbox"/>	ALARCON	JADE	Teacher
		<input type="checkbox"/>	ALEMAN	EARLINE	Teacher
		<input type="checkbox"/>	ALONZO	EDDA	Teacher
		<input type="checkbox"/>	AMBROSE	DORI	Teacher

Select All **Unassign -->** **<-- Assign** Select All



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Assigning Children to the Classroom

[+ Expand Filter]

	Class	Description	School Year	Program	# Students	# Teachers	# Aides		
Attendance	Room 107 (12:1:2)	Klingenberg	2015 - 2016 Winter	9115	0	1	0	Edit Classroom	Assign Children
Attendance	Room 109 (10:1:1)	Silverstein	2015 - 2016 Winter	9165	0	1	0	Edit Classroom	Assign Children
Attendance	Room 112 (12:1:1)	Austin	2015 - 2016 Winter	9160	0	1	0	Edit Classroom	Assign Children
Attendance	Room 201 (15:1:1)	Caruso	2015 - 2016 Winter	9103	0	1	0	Edit Classroom	Assign Children

[+ Create New Classroom](#)

- ▶ From Classroom Management page, click Assign Children
- ▶ Select students from the left list, choose role and click Assign

Classroom: **Room 107**

Assigned to Classroom

No children currently assigned to classroom.

Select All

[Unassign -->](#)

Not Assigned

[+ Filter Unassigned Children]

Select	Last Name	First Name	District	County	DOB	
<input type="checkbox"/>	CODY	COLLIN	LEVITTOWN UFSD	NASSAU	1/30/2013	Details
<input type="checkbox"/>	HOLMES	LEE	SEAFORD UFSD	NASSAU	9/7/2011	Details
<input type="checkbox"/>	MORAN	MARCELINO	MASSAPEQUA UFSD	NASSAU	5/10/2012	Details
<input type="checkbox"/>	VU	JUNG	LEVITTOWN UFSD	NASSAU	10/26/2012	Details

[<-- Assign](#)

Select All

Not Assigned

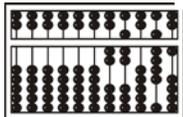
[- Collapse Filter]

_Filter Unassigned Children

Last Name Begins With:

First Name Begins With:

[Filter](#)



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Entering Attendance

- ▶ Click Attendance link from Classroom management page
- ▶ Select individual cells to indicate present that day
- ▶ Click the check mark in the day of week heading to mark all children present that day

[+ Expand Filter]

	Class
Attendance	Room 107 (12:10:00-12:30:00)
Attendance	Room 109 (10:10:00-10:30:00)

Classroom: Room 109

Unsaved attendance changes exist.

Current Week 

-

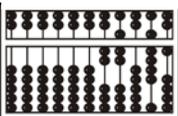
[Print Attendance Sheet](#)

Child	Enrollment	Mon <input checked="" type="checkbox"/>	Tue <input checked="" type="checkbox"/>	Wed <input checked="" type="checkbox"/>	Thu <input checked="" type="checkbox"/>	Fri <input checked="" type="checkbox"/>
		06/06/16	06/07/16	06/08/16	06/09/16	06/10/16
ASH, ALBINA	4/11/16-4/17/16 (CB1516W0055079)					
COPELAND, MURRAY	9/02/15-6/24/16 (CB1516W0054429)					
FINCH, LOUIS	2/01/16-6/24/16 (CB1516W0054987)					
MCLAIN, CHAROLETTE	9/02/15-6/24/16 (CB1516W0054270)					
MELTON, SHANA	9/02/15-6/24/16 (CB1516W0053546)					

Total Sessions:

[Return to Classrooms](#)

[Save Attendances](#)

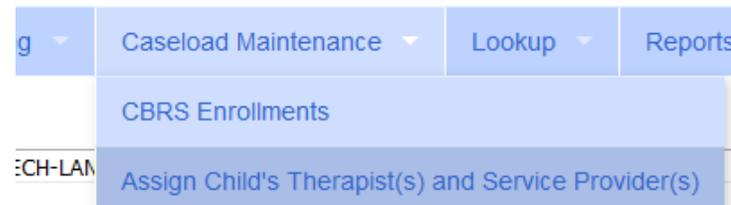


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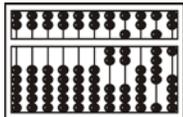
Adding enrollments for services included in the tuition (CBRS)

- ▶ CPSE Portal refers to related services that are included in the tuition (not fee for service) as Center based Related Services (CBRS)
- ▶ Unlike other enrollments, the County does not upload these
- ▶ To create them, use the CBRS Enrollments page



CB Enrollments

Session Provider MISERICORDIA UNIVERSITY SPEECH-LANGUAGE AND HEARING CENTER County Last Name First Name DOB



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Adding CBRS enrollments

- ▶ First search for the center based enrollment

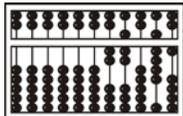
CB Enrollments

Session Provider County

Last Name First Name DOB

- ▶ Click the select link on the target center based enrollment

County	District	Last Name	First Name	ElectronicServiceID	Provider	Program	Start Date	End Date	
NASSAU	FRANKLIN SQUARE UFSD	SCOTT	ANDREW	CB1516W0053700	MISERICORDIA UNIVERSITY SPEECH-LANGUAGE AND HEARING CENTER	9160-	09/02/2015	01/14/2016	Select
NASSAU	FRANKLIN SQUARE UFSD	SCOTT	ANDREW	CB1516W0054977	MISERICORDIA UNIVERSITY SPEECH-LANGUAGE AND HEARING CENTER	9160-	01/19/2016	06/24/2016	Select

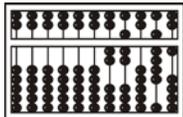


Adding CBRS enrollments

- ▶ Upon selecting an enrollment, the bottom of the page will display a grid with the services
- ▶ The last row is blank to add new rows
- ▶ You can also edit existing rows

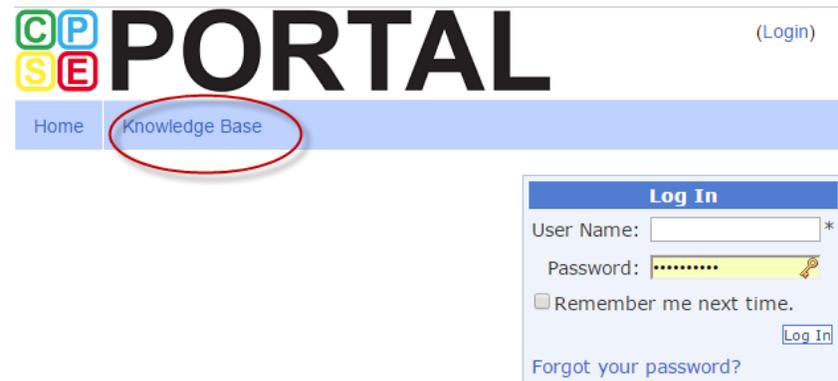
Included Services for SCOTT, ANDREW

ElectronicServiceID	From	To	RS Type	I or G	Units	Minutes	Timespan	
CPSECBRS0000004359	9/2/2015	6/24/2016	OT	I	2.00	30	WEEKLY	Edit
CPSECBRS0000004360	9/2/2015	6/24/2016	ST	I	2.00	30	WEEKLY	Edit
CPSECBRS0000004361	9/2/2015	6/24/2016	PT	I	2.00	30	WEEKLY	Edit
	<input type="text" value="1/19/2016"/>	<input type="text" value="6/24/2016"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="Weekly"/>	Add

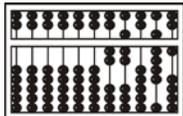


Additional Information

- ▶ 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 interface. At the top left is the logo consisting of the letters 'C', 'P', 'S', and 'E' in colored boxes (green, blue, yellow, red) followed by the word 'PORTAL' in large black letters. To the right of the logo is a '(Login)' link. Below the logo is a navigation bar with two items: 'Home' and 'Knowledge Base'. The 'Knowledge Base' item 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 a 'User Name:' field with an asterisk, a 'Password:' field with a key icon, a checkbox for 'Remember me next time.', and a 'Log In' button. Below the form is a link for 'Forgot your password?'.



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