Introduction to:
Student CoSer/Services Manager
A User's Guide

Special Education Services Management
Agenda

- Special Education Options
  - Student CoSer/Services Manager Module
    - Assigning CoSers & Services Simultaneously

Special Education Services Management
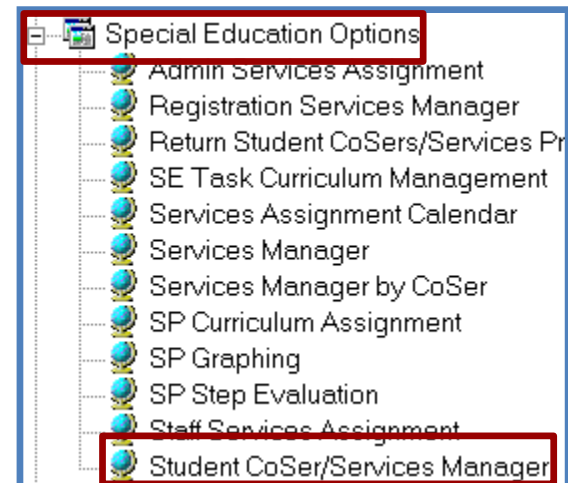
Student CoSer/Services Manager

Module Overview

The purpose of this module is to create and maintain student CoSer(s) & Services at the same time within the same module. Use pre-defined, defaulted and automatically filled in fields to accomplish assigning/scheduling student's CoSers and Services with more ease and efficiency. You can also Delete CoSer & Services & perform District Updates from this module as well.

Don't want to use defaulted fields? No problem – you can skip the defaulted set up and choose to pick your own selections each time.

Getting Started

Double Click on **My Modules >** Double Click **Special Education Options >** Click **Student CoSer/Services Manager**

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Student CoSer/Services Manager –CoSer/Services History Tab

Select the CoSer/Services History tab to preview all assigned CoSer(s) & Service(s) for a student.

Data included for CoSer History:
1. CoSer Number
2. CoSer Name
3. Start Date
4. End Date
5. Funding District

Data included for Services History
1. Service Name
2. Ratio
3. Duration
4. Start Date
5. End Date

CoSer/Services History | Create New | Change Existing | District Updates | Deletion

CoSer History

#	CoSer	CoserName	S
39	0200	02 Psychology Services	1
38	0300	03 Counseling & Case Management	1
37	0200	02 Psychology Services	0
36	0200	02 Psychology Services	0
35	0200	02 Psychology Services	0
34	1000	10 Recreation	0
33	0300	03 Counseling & Case Management	0
32	0700	07 Life Adjustment Services	0
31	0200	02 Psychology Services	0
30	0200	02 Psychology Services	

Services History

#	Service	Ratio	Duration
1	ORI Hear Screening-Admit	Single Occurance	50
2	ORI CTR Discover Recreation	Single Occurance	50
3	ORI Goal Settings	Single Occurance	110
4	Psy TABE		110

Special Education Services Management

Student CoSer/Services Manager – Create New Tab

The following instructions are for using the <u>non-defaulted method</u>

Select Student from student list – you have the option to toggle between Selected location or All SE Locations

1. ***Select New CoSer** from dropdown
2. *Enter **Start Date & End Date**
3. Verify the following – update if needed
   a. Location, District, FTP %, Session, Include in Billing Y/N, Include Default Services (new feature which allows you to default services automatically for CoSers)
4. ***Select a New Service** using the choices available (available options are dependent of what is set up in CoSer Billing Information module)
5. Verify the **Start Date & End Date** have been updated based on CoSer Start/End Dates
6. *Select a Duration
7. *Select a Ratio
8. *Select a Frequency
9. Select an Aide % (if applicable)
10. *Select a Service Type from the dropdown
11. *Select a Staff Type from the dropdown
12. *Select the Staff member
13. Verify the Site/Building is accurate – update if needed

Note: An * (asterisk) denotes a mandatory field

Special Education Services Management

Student CoSer/Services Manager – Create New Tab

The following instructions are for using the <u>non-defaulted method (continued)</u>

14. Check and/or enter any of the following that apply:
    a. Prescription on File, Prescription Date, Prescription Needed, Include on State Reporting
15. Enter in the Under Direction Of (UDO) if applicable
16. *Select a Provider from the dropdown
17. Enter a Memo if applicable
18. Click the **Blue Enroll Now button** to Save entry

Note: An * (asterisk) denotes a mandatory field

Special Education Services Management

Harris School Solutions

Student CoSer/Services Manager – Create New Tab

Non-Default Method

Special Education Services Management

Student CoSer/Services Manager – Create New Tab

The following instructions are for using the <u>Default method</u>

Select Student from student list – you have the option to toggle between Selected location or All SE Locations

1. ***Select New CoSer** from dropdown
2. *Enter **Start Date & End Date**
3. Verify the following – update if needed
    a. Location, District, FTP %, Session, Include in Billing Y/N, Include Default Services (new feature which allows you to default services automatically for CoSers)
4. ***Select a New Service** using the choices available (available options are dependent of what is set up in CoSer Billing Information module)
5. Verify the **Start Date & End Date** have been updated based on CoSer Start/End Dates
6. Verify and/or change the following:
    a. Duration, Ratio, Frequency, Aide %, Service Type, Staff Type, Site/Building
7. *Select the Staff member
8. Check and/or enter any of the following that apply:
    a. Prescription on File, Prescription Date, Prescription Needed, Include on State Reporting
9. Enter in the Under Direction Of (UDO) if applicable
10. *Select a Provider from the dropdown
11. Enter a Memo if applicable
12. Click the Blue Enroll Now button

Note: An * (asterisk) denotes a mandatory field

Special Education Services Management

Student CoSer/Services Manager – Create New Tab

Default Method

Special Education Services Management

Student CoSer/Services Manager – Change Existing Tab

The following instructions are used to perform Changes to Existing CoSer(s) & Service(s)

Select Student from student list – you have the option to toggle between Selected location or All SE Locations

Updating CoSer Information
1. Select A Student CoSer to Update by clicking on the entry in the display box
2. Update the appropriate Student Coser Information
3. To Update BOTH Services & CoSer information select the Update All Services Checkbox, otherwise, click the **Blue Update CoSer button** to update only the CoSer.
    1. If you choose to update BOTH you will need to confirm you want to update Services, by clicking yes
4. Verify the change has occurred

Updating Services Information
1. Select a Student Service to update by clicking on the entry in the display box
2. Update the appropriate Student Services Information
3. Click the **Blue Update Service button** to update the Service
4. Verify the change has occurred

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Student CoSer/Services Manager – Change Existing Tab
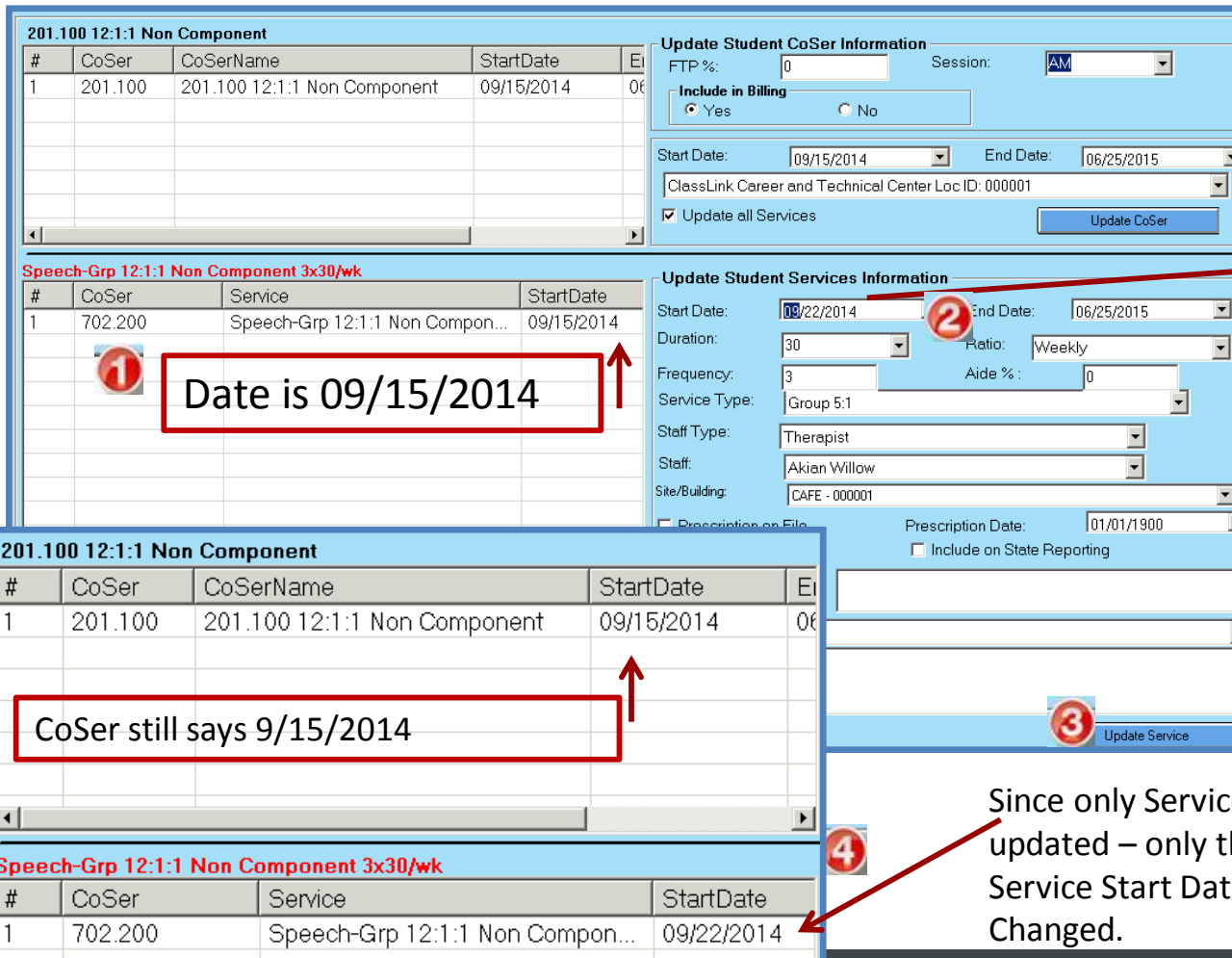
Updating a CoSer

Date is 09/03/2014

Changed Start date to 09/15/2014

Since both the Update Services & CoSer was selected, both start dates changed. If only Update CoSer button is selected, only the CoSer would update.

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Student CoSer/Services Manager – Change Existing Tab

Updating a Service

Date is 09/15/2014

CoSer still says 9/15/2014

Changed Start date to 09/22/2014

Since only Services were updated – only the Service Start Date Changed.

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Student CoSer/Services Manager – District Updates Tab

The following instructions are used to perform Changes to District for Existing CoSer(s) & Service(s)

Select Student from student list – you have the option to toggle between Selected location or All SE Locations

To Change a District due to District change
1. Select the district that needs to be updated from the display box
2. Enter an End Date for that district
3. Select a new district from the dropdown
4. Enter a Start and End date for the new district
5. Click the **Blue District Change button**
6. Notice the history of Districts now in the display box, the "old" district with an end date, the "new" district with a different start date.

To Update a District due to error
1. Select the district that needs to be changed from the display box
2. Select a new district from the dropdown below
3. Click the **Blue Update District button**
4. Notice the District selected has now updated to be the correct district

Special Education Services Management

Student CoSer/Services Manager – District Updates Tab

The following instructions are used to perform Changes to District for Existing CoSer(s) & Service(s)

District Change

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Student CoSer/Services Manager – District Updates Tab

The following instructions are used to perform Changes to District for Existing CoSer(s) & Service(s)

Update District

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Student CoSer/Services Manager – Deletion Tab

The following instructions are used to Delete Existing CoSer(s) & Service(s)

Select Student from student list – you have the option to toggle between Selected location or All SE Locations
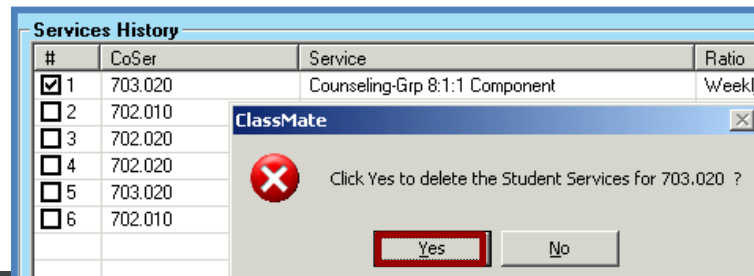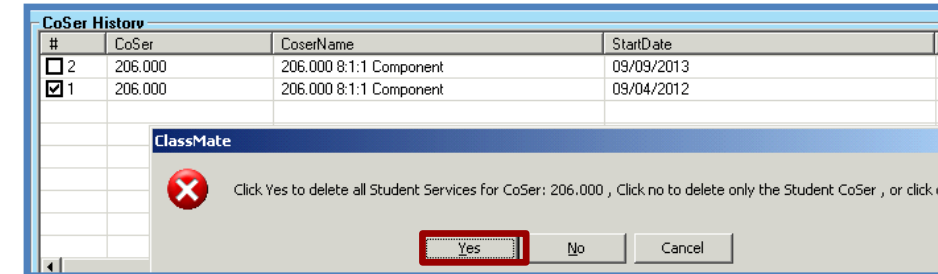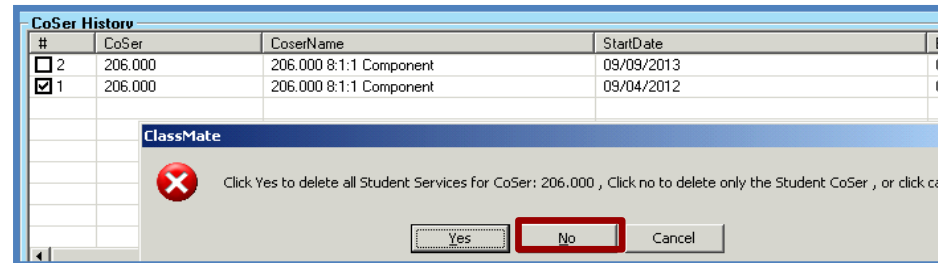
To delete a CoSer only
1. Click on the checkbox next to the CoSer
2. With the message that pops up and click NO

To delete a CoSer with corresponding Services
1. Click on the checkbox next to the CoSer
2. With the message that pops up and click YES

To delete a Service only
1. Click on the checkbox next to the Service
2. With the message that pops up and click YES

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Questions? Contact us!

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