

# 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

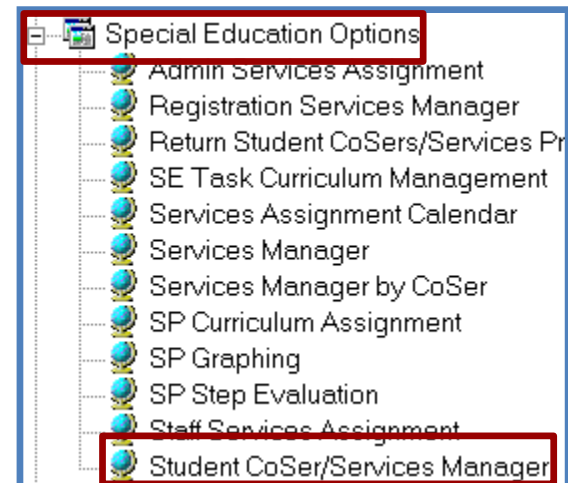
### Module Overview

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**



# Special Education Services Management

## 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	
39	0200	02 Psychology Services	1
38	0300	03 Counseling & Case Management	1
37	0200	02 Psychology Services	C
36	0200	02 Psychology Services	C
35	0200	02 Psychology Services	C
34	1000	10 Recreation	C
33	0300	03 Counseling & Case Management	C
32	0700	07 Life Adjustment Services	C
31	0200	02 Psychology Services	C
30	0200	02 Psychology Services	C
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
5	ORI Hear Screening-Admit	Single Occurance	50



# Special Education Services Management

## Student CoSer/Services Manager – Create New Tab

The following instructions are for using the [non-defaulted method](#)

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 [non-defaulted method \(continued\)](#)

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

## Student CoSer/Services Manager – Create New Tab

## Non-Default Method

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

**Select New Coser:** 02 Psychology Services **1**

Start Date: 02/08/2018 **2** End Date: 06/29/2018

– Select A Billing Location –

– Select A Responsible District –

**New Coser Information**

FTP %: 100 **3** Session: AM

Include in Billing  No  Include Default Services  No

**View Student CoSers**

#	CoSer	CoSerName	StartDate	EndE
39	0200	02 Psychology Services	10/17/2017	06/29/2018
38	0300	03 Counseling & Case M...	10/05/2017	06/29/2018
37	0200	02 Psychology Services	09/25/2017	06/29/2018
36	0200	02 Psychology Services	09/21/2017	06/29/2018
35	0200	02 Psychology Services	08/31/2017	06/29/2018
34	1000	10 Recreation	08/30/2017	06/29/2018
33	0300	03 Counseling & Case M...	08/30/2017	06/29/2018

**Select A New Service**

CoSer	ServiceName <b>4</b>	OptionName
000002	Psy Anxiety / Stress Mgmt	Psychology Services
01	Psy Music Therapy	Psychology Services
01	Psy Neuropsychological E...	Psychology Assessments
01	Psychiatric Initial Evalation	Psychiatric Clinic
02	Psy AAPD Group	Psychology Services
02	Psvchiatric Follow-up	Psvchiatric Clinic

**New Service Information**

Start Date: 02/08/2018 **5** End Date: 06/29/2018

Duration: **6** Ratio: **7**

Frequency: **8** Aide %: 0 **9**

Service Type: – Select A New Services Type **10**

Staff Type: – Select A New Staff Type **11**

Staff: – Select A Staff Member **12**

Site/Building: – Select A Site/Building **13**

Prescription on File Prescription Date: 01/01/1900  
 Prescription Needed **14**  Include on State Reporting

Under Direction Of: **15**

Provider: **16** – Select A New Service Provider

Memo: **17**

**Enroll Now** **18**

**View Student Services**

#	Service	StartDate	EndDate
1	ORI Hear Screening-Admit	07/17/2017	06/29/2018
2	ORI CTR Discover Recreati...	07/17/2017	06/29/2018
3	ORI Goal Settings	07/17/2017	06/29/2018
4	Psy TABE	07/17/2017	06/29/2018
5	Psy Attention Please	07/17/2017	06/29/2018
6	Psv Adjustment Group	07/17/2017	06/29/2018



# Special Education Services Management

## Student CoSer/Services Manager – Create New Tab

The following instructions are for using the [Default method](#)

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

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

**Select New Coser:** 02 Psychology Services **1**

Start Date: 02/08/2018 **2** End Date: 06/29/2018

– Select A Billing Location –

– Select A Responsible District

**New Coser Information**

FTP %: 100 **3** Session: AM

Include in Billing:  Yes  No

Include Default Services:  Yes  No

**View Student CoSers**

#	CoSer	CoSerName	StartDate	End
39	0200	02 Psychology Services	10/17/2017	06/29
38	0300	03 Counseling & Case M...	10/05/2017	06/29
37	0200	02 Psychology Services	09/25/2017	06/29
36	0200	02 Psychology Services	09/21/2017	06/29
35	0200	02 Psychology Services	08/31/2017	06/29
34	1000	10 Recreation	08/30/2017	06/29
33	0300	03 Counseling & Case M...	08/30/2017	06/29

**Select A New Service**

CoSer	ServiceName <b>4</b>	OptionName
000002	Psy Anxiety / Stress Mgmt	Psychology Services
01	Psy Music Therapy	Psychology Services
01	Psy Neuropsychological E...	Psychology Assessments
01	Psychiatric Initial Evalation	Psychiatric Clinic
02	Psy AAPD Group	Psychology Services
02	Psychiatric Follow-up	Psychiatric Clinic

Enroll Now

**View Student Services**

#	Service	StartDate	EndDate
1	ORI Hear Screening-Admit	07/17/2017	06/29/2018
2	ORI CTR Discover Recreati...	07/17/2017	06/29/2018
3	ORI Goal Settings	07/17/2017	06/29/2018
4	Psy TAFE	07/17/2017	06/29/2018
5	Psy Attention Please	07/17/2017	06/29/2018
6	Psv Adjustment Group	07/17/2017	06/29/2018

**New Service Information**

Start Date: 02/08/2018 **5** End Date: 06/29/2018

Duration: Ratio:

Frequency: **6** Aide %: 0

Service Type: – Select A New Services Type

Staff Type: – Select A New Staff Type

Staff: – Select A Staff Member **7**

Site/Building: – Select A Site/Building

Prescription on File Prescription Date: 01/01/1900

Prescription Needed **8**  Include on State Reporting

Under Direction Of: **9**

Provider: – Select A New Service Provider **10**

Memo: **11**



# 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



# Special Education Services Management

## Student CoSer/Services Manager – Change Existing Tab

## Updating a CoSer

**201.100 12:1:1 Non Component**

#	CoSer	CoSerName	StartDate	End Date
1	201.100	201.100 12:1:1 Non Component	09/03/2014	06/25/2015

**Update Student CoSer Information**

FTP %:  Session:

**Include in Billing**

Yes  No

Start Date:  End Date:

ClassLink Career and Technical Center Loc ID: 000001

Update all Services

**Select a Student Service to update**

#	CoSer	Service	StartDate
1	702.200	Speech-Grp 12:1:1 Non Compon...	09/03/2014

**Update Student Services Information**

Start Date:  End Date:

Duration:  Ratio:

**Date is 09/03/2014** ↑

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

**201.100 12:1:1 Non Component**

#	CoSer	CoSerName	StartDate	End Date
1	201.100	201.100 12:1:1 Non Component	09/15/2014	06/25/2015

**Update Student CoSer Information**

FTP %:  Session:

**Include in Billing**

Yes  No

Start Date:  End Date:

ClassLink Career and Technical Center Loc ID: 000001

Update all Services

**Select a Student Service to update**

#	CoSer	Service	StartDate
1	702.200	Speech-Grp 12:1:1 Non Compon...	09/15/2014

**Update Student Services Information**

Start Date:  End Date:

Duration:  Ratio:

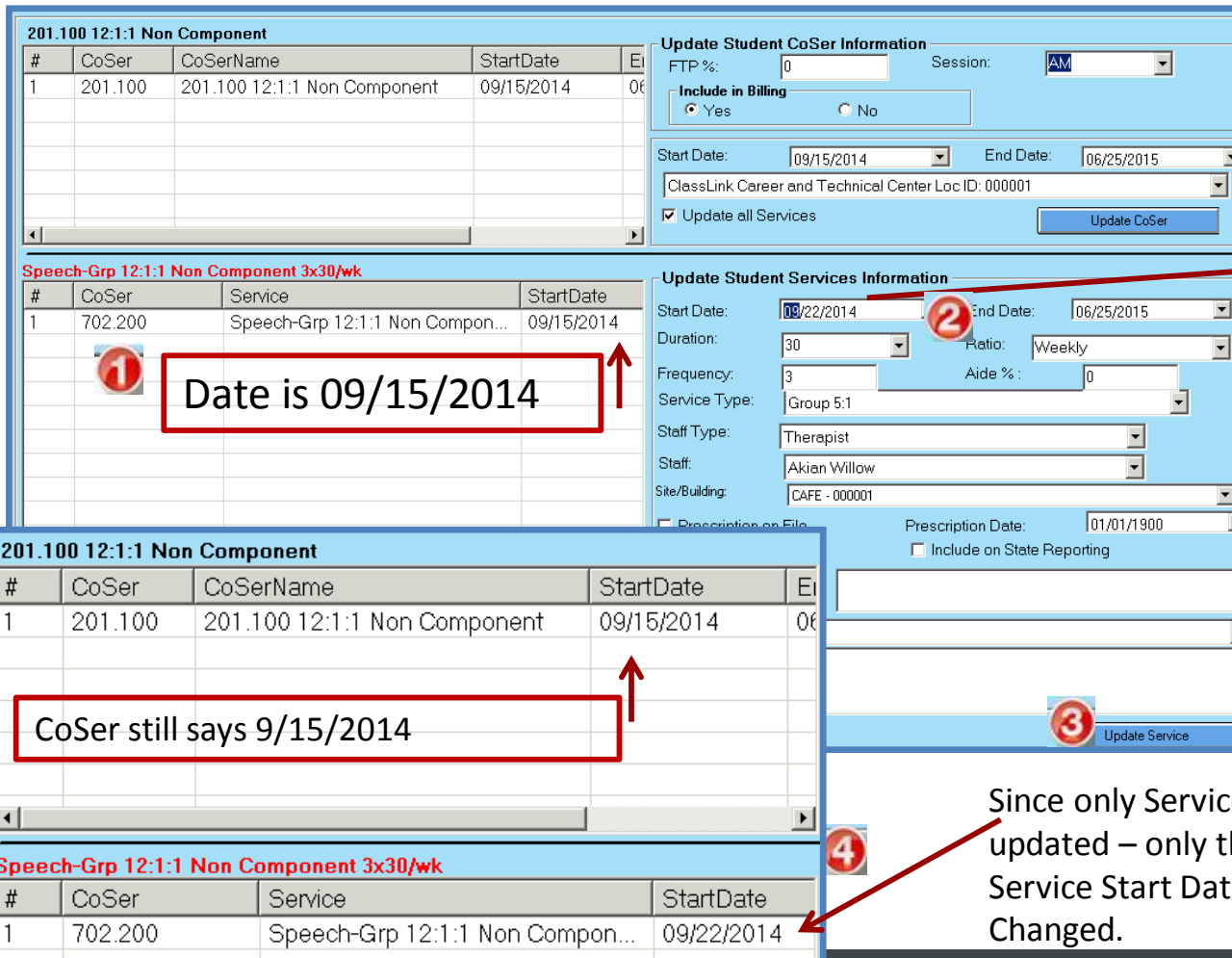
Changd Start date to 09/15/2014

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

# Special Education Services Management

## Student CoSer/Services Manager – Change Existing Tab

## Updating a Service



**201.100 12:1:1 Non Component**

#	CoSer	CoSerName	StartDate	El
1	201.100	201.100 12:1:1 Non Component	09/15/2014	06/25/2015

**Update Student CoSer Information**

FTP %:  Session:

Include in Billing:  Yes  No

Start Date:  End Date:

ClassLink Career and Technical Center Loc ID: 000001

Update all Services

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**Speech-Grp 12:1:1 Non Component 3x30/wk**

#	CoSer	Service	StartDate
1	702.200	Speech-Grp 12:1:1 Non Compon...	09/15/2014

**Update Student Services Information**

Start Date:  End Date:

Duration:  Ratio:

Frequency:  Aide %:

Service Type:

Staff Type:

Staff:

Site/Building:

Prescription on File:  Prescription Date:

Include on State Reporting

Changed Start date to 09/22/2014

Date is 09/15/2014

CoSer still says 9/15/2014

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



# 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)

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

CoSer/Services History   Create New   Change Existing   <b>District Updates</b>   Deletion						
Select A Student CoSer						
#	CoSer	CoSerName	Funding	StartDate	EndDate	
1	206.100	206.100 8:1:1 Non Component <b>1</b>	Ellenville Central School	01/08/2014	06/26/2014	

**CoSer: 206.100 8:1:1 Non Component** Start Date: 01/08/2014  
**District: Ellenville Central School** End Date: 04/07/2014 **2**

**District Change: Enter an End date, New District, New Start, New End, then click District Change**

**New District:** Liberty Central School District **3**  
**New Start Date:** 01/08/2014 **4** **New End Date:** 06/26/2014 **5** **District Change**

CoSer/Services History   Create New   Change Existing   <b>District Updates</b>   Deletion						
Select A Student CoSer						
#	CoSer	CoSerName	Funding	StartDate	EndDate	
2	206.100	206.100 8:1:1 Non Component	Liberty Central School ...	04/08/2014	06/26/2014	
1	206.100	206.100 8:1:1 Non Component <b>6</b>	Ellenville Central School	01/08/2014	04/07/2014	





# 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)

### Update District

CoSer/Services History   Create New   Change Existing   District Updates   Deletion						
Select A Student CoSer						
#	CoSer	CoSerName	Funding	StartDate	EndDate	
2	206.000	206.000 8:1:1 Component	Sullivan West Central ...	09/09/2013	06/26/2014	
1	206.000	206.000 8:1:1 Component	Sullivan West Central ...	09/04/2012	06/21/2013	

**District Correction:** Select a New District, click to update services, and then click District Update

**New District:**  District Update

CoSer/Services History   Create New   Change Existing   District Updates   Deletion						
Select A Student CoSer						
#	CoSer	CoSerName	Funding	StartDate	EndDate	
2	206.000	206.000 8:1:1 Component	Middletown City Scho...	09/09/2013	06/26/2014	
1	206.000	206.000 8:1:1 Component	Sullivan west Central ...	09/04/2012	06/21/2013	



# Special Education Services Management

## 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

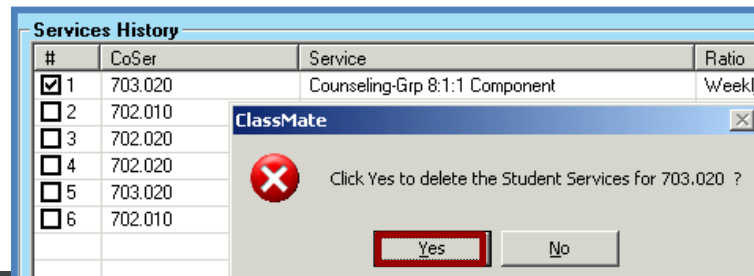
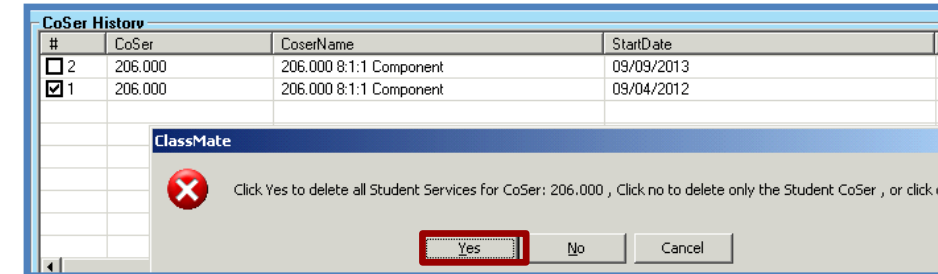
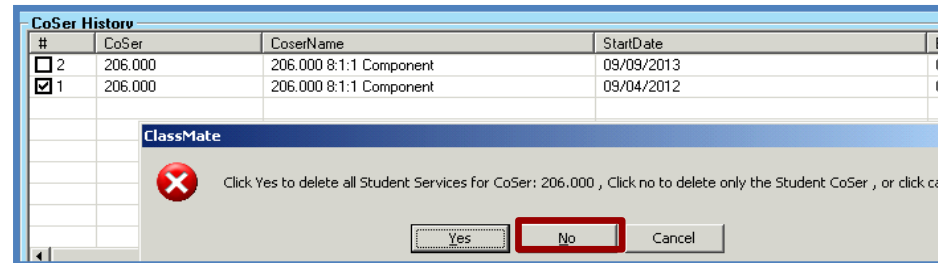
1. Click on the checkbox next to the CoSer
2. With the message that pops up and click NO

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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