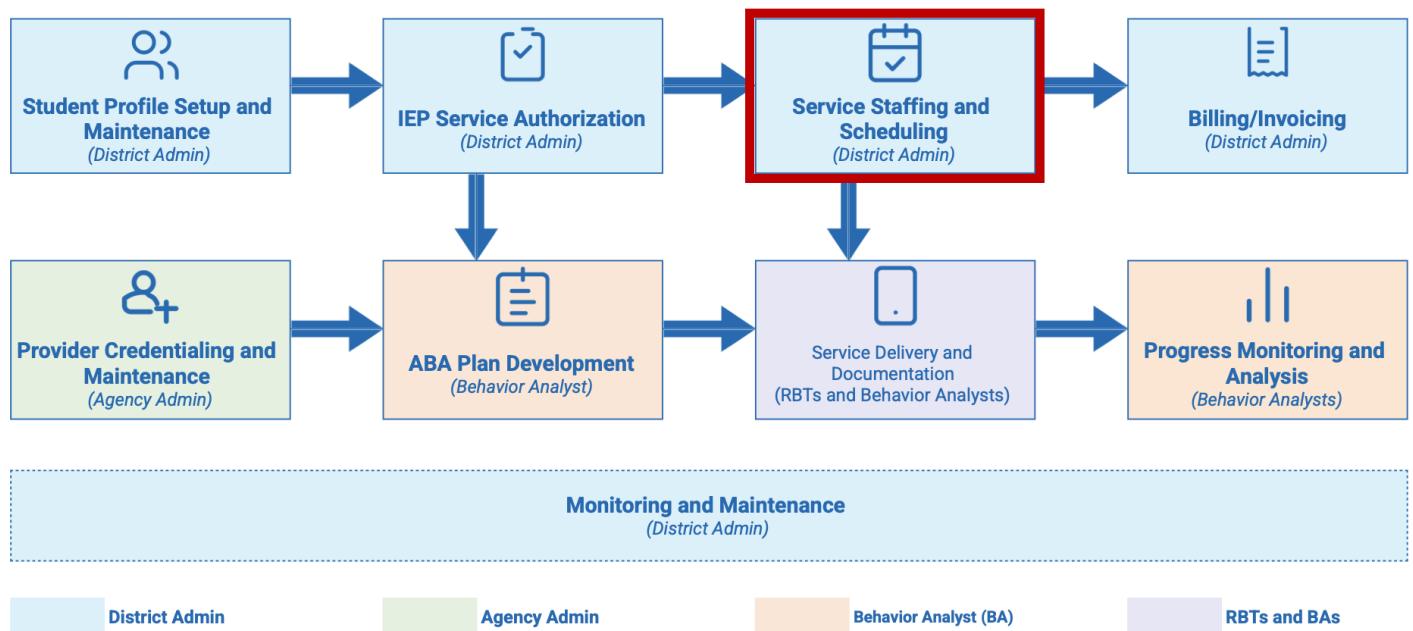




# Student Profile Setup and Maintenance



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# Case Assignment

## What

The process of linking a student to a specific employee in CentralReach and simultaneously updating all associated profiles to enable all subsequent clinical and administrative workflows.

## Purpose

To clearly define which team members are responsible for a student's services, enabling efficient management of caseloads, facilitating access to necessary student documentation for assigned staff, and streamlining the delivery and tracking of services.

## Who

Typically performed by District Educational Specialists (DES) and designated District Staff responsible for caseload management and student intake.

## When

Case assignment must be completed before any clinical or administrative workflows can begin.

## Terminology

- [Inputting New Students](#): Inputting Students into CentralReach
- [Inputting New/Managing District Employees](#): Inputting District Employees into CentralReach
- Agency New Applicant
- [Connections](#): The relationships between profiles that enable information sharing and workflow management.
- [Interval Updates](#): Scheduled, bulk changes made to CentralReach to keep the system up-to-date
- [Contact Labels](#): Labels attached to client and employee profile
- [Profile Information](#): Complete collection of data that defines an individual within the system, encompassing all their details and settings
- [Authorizations](#): A student's IEP Services
- [Cancel/Delete Appointments](#): Removing a previously scheduled session
- [Scheduling](#): A student's schedule of services

 District Glossary (SOP)

## Resources

- Instructional Slides:  Case Assignment (SOP)
- CR Support Checklist:
  -  Case Assignment: CR Support Checklist (MASTER-SOP)
  -  Case UnAssignment: CR Support Checklist (MASTER-SOP)
  -  Case ReAssignment: CR Support Checklist (MASTER-SOP)
- Training Video: Coming Soon

## Step-by-Step Instructions

### Case Assignment

[Case Assignment \(SOP\)](#)

#### Prerequisites

[Case Assignment \(SOP\)](#)

- Student has been inputted into CentralReach
- Provider(s) has been inputted into CentralReach

#### Connections

[Case Assignment \(SOP\)](#)

- Behavior Analyst to Student (Share Settings: Share All [Can Edit])
- RBT to Student (Documents, Notes, & Clinical Sessions)
- Behavior Analyst to RBT (*All boxes unchecked*)

#### Updating Profile

[Case Assignment \(SOP\)](#)

- Update Provider's Profile (Labels & Information)
- Update Student Profile (Labels & Information)
- Review Authorization

#### Scheduling

[Case Assignment \(SOP\)](#)

- Date & Time
- Recurring Schedule (if applicable)
- Primary Provider
- Appointment with
- Appointment Type OR Appointment Name
- Place of Service
- Authorized Code

# Scheduling

## What

The process of setting up student appointments within CentralReach, where each appointment is pre-configured with relevant service codes, rates, and service note requirements.

## Purpose

To streamline student appointments and optimize administrative workflows by ensuring appointments are linked to student authorizations, contain all necessary billing information, and simplify timesheet conversion, enabling CentralReach to efficiently generate and manage billing entries.

## Who

Behavior Analysts will schedule their own appointments. District/State Staff will be responsible for scheduling appointments for RBTs.

## When

Scheduling takes place after a student's profile has been created, their services have been officially authorized, and they have been assigned to a qualified provider. Scheduling also occurs prior to the delivery of any services.

## Terminology

- [Service Codes](#): A line of service on the IEP
- [Authorizations](#): A student's IEP Services
- [Connections](#): The relationships between profiles that enable information sharing and workflow management.
- [Calendar Permissions](#): Access to view, create, edit, or delete events on various calendars
- [Interval Updates](#): Scheduled, bulk changes made to CentralReach to keep the system up-to-date
- [Cancel/Delete Appointments](#): Removing a previously scheduled session
- [Substitute RBT Process](#): Updating a Substitute RBTs student connections and schedule for the cases they are covering
- [Extended School Year: Authorizations and Scheduling](#): A student's IEP Services and Appointments during Extended School Year

 District Glossary (SOP)

## Resources

- Instructional Slides: [📄 Scheduling \(SOP\)](#)
- CR Support Checklist: [📋 Scheduling: CR Support Checklist \(MASTER-SOP\)](#)
- Training Video: Coming Soon

## Step-by-Step Instructions

### Scheduling

[Scheduling \(SOP\)](#)

#### Prerequisites

[Scheduling \(SOP\)](#)

- Authorization is entered
- Provider is connected to the Student

#### Scheduling an Appointment

[Scheduling \(SOP\)](#)

- Date & Time
- Recurring Schedule (if applicable)
- Primary Provider
- Appointment with
- Appointment Type OR Appointment Name
- Place of Service
- Authorized Code

#### Special Circumstances

[Scheduling \(SOP\)](#)

- Multiple RBTs with one student at the same time (if applicable)
- BA supervising Multiple RBTs with Multiple students at the same time (if applicable)
- Transportation ABA Services (if applicable)
- Behavior Analyst providing Direct Services (if applicable)

# Substitute RBT Process

## What

The process of updating a substitute Registered Behavior Technician (RBT)'s connections to specific students and modifying their schedule within CentralReach. This involves linking the RBT to new students they will be subbing for, as employees are initially only connected to their assigned students.

## Purpose

To ensure that services can be delivered seamlessly by substitute RBTs within the system by providing them with the necessary student connections and an accurate schedule for the cases they are covering. This enables them to access relevant student profiles, document services, and accurately track their time for billing.

## Who

Typically managed by District Educational Specialists (DES) or designated District Staff responsible for RBT scheduling and caseload management.

## When

The substitute RBT process is initiated when a scheduled RBT is unavailable and a sub RBT is assigned

- The connections must be completed to allow the sub RBT to begin data collection.
- The scheduling changes must be completed before the end of the session to allow the sub RBT to submit their timesheet/convert their appointment.

## Terminology

- [Authorizations](#): A student's IEP Services
- [Calendar Permissions](#): Access to view, create, edit, or delete events on various calendars
- [Connections](#): The relationships between profiles that enable information sharing and workflow management.
- [Interval Updates](#): Scheduled, bulk changes made to CentralReach to keep the system up-to-date

 District Glossary (SOP)

## Resources

- Instructional Slides: [☐ Substitute RBT Process \(SOP\)](#)
- CR Support Checklist: [☒ Sub RBT Process: CR Support Checklist \(MASTER-SOP\)](#)
- Training Video: Coming Soon

## Step-by-Step Instructions

### Sub RBT Process

[Substitute RBT Process \(SOP\)](#)

#### Prerequisites

[Substitute RBT Process \(SOP\)](#)

- Authorization is entered

#### Connections

[Substitute RBT Process \(SOP\)](#)  
[Connections \(SOP\)](#)

- Sub RBT to Student (Documents, Notes, & Clinical Sessions)
- Sub RBT to Behavior Analyst (All boxes unchecked)

#### Scheduling

[Substitute RBT Process \(SOP\)](#)

- Change Primary Provider on Appointment
- Change Service Code (if applicable)