

CPSE Portal


Billing Providers Overview

Topics

- ▶ Logging in
- ▶ Changing your password/Forgot My Password
- ▶ Your profile
- ▶ Adding Service Providers/Users
- ▶ Assigning Service Providers/Teachers
- ▶ Classrooms
- ▶ Entering Attendance
- ▶ Reports
- ▶ FAQs

Logging In/Forgot your password

← → ↻ <https://training.cpseportal.com> 🔑 ☆ ☰

CPSEExchange (Login)  JAMES MCGUINNESS & ASSOCIATES INC. Consultants

Home FAQ

Log In

User Name:

Password:

Remember me next time. [Log In](#)

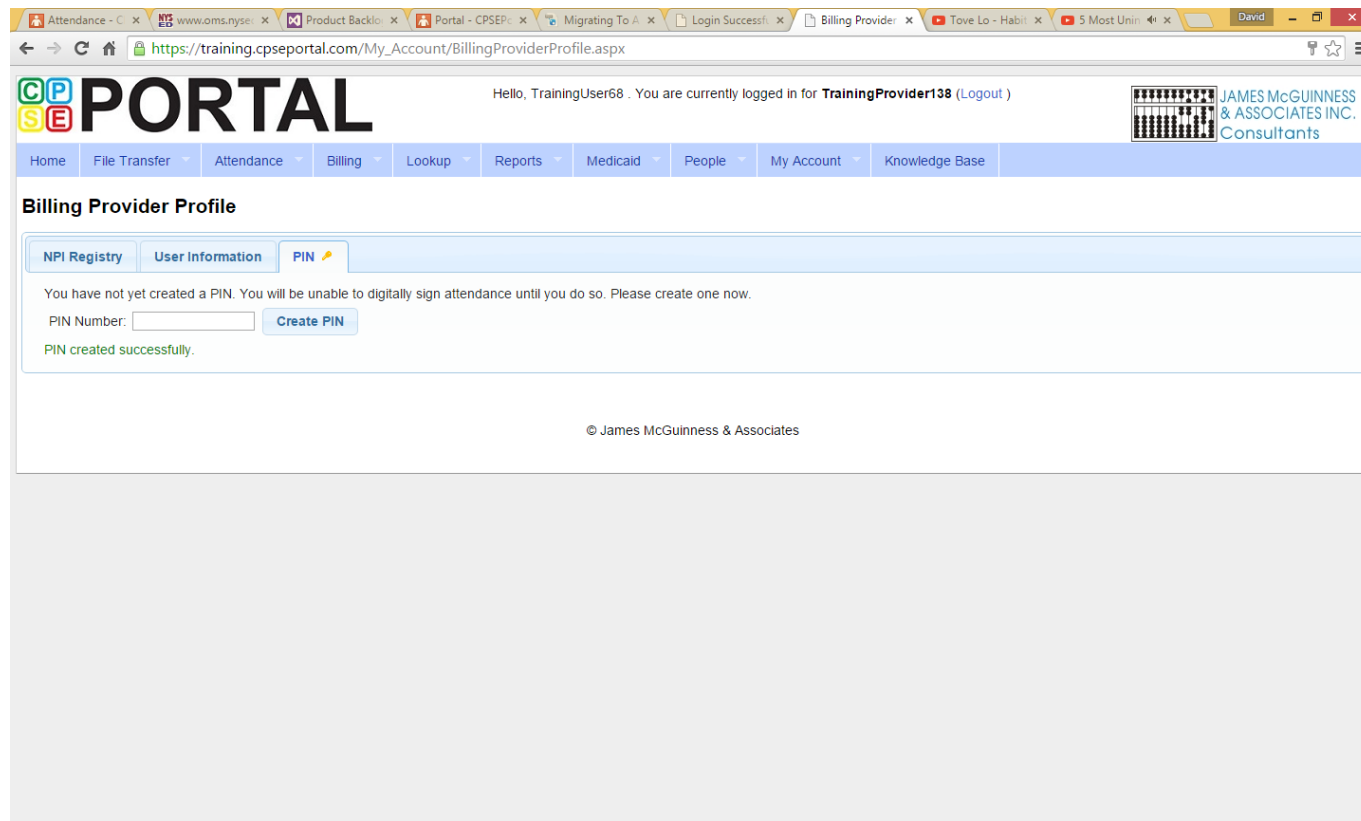
[Forgot your password?](#)

© James McGuinness & Associates

Changing your password

- ▶ <http://www.bu.edu/infosec/howtos/how-to-choose-a-password/>

Billing Provider PIN



The screenshot shows a web browser window with the URL https://training.cpseportal.com/My_Account/BillingProviderProfile.aspx. The page header includes the CPSE PORTAL logo, a user greeting for TrainingUser68 logged in as TrainingProvider138, and the logo for James McGuinness & Associates Inc. Consultants. A navigation menu contains links for Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base.

Billing Provider Profile

NPI Registry | **User Information** | **PIN**

You have not yet created a PIN. You will be unable to digitally sign attendance until you do so. Please create one now.

PIN Number:

PIN created successfully.

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Creating Service Provider Accounts

The screenshot displays the CPSEExchange web application interface. At the top, the logo 'CPSEExchange' is on the left, and the user is logged in as 'ACHIEVEMENTS' with a 'Logout' link. The company name 'JAMES McGUINNESS & ASSOCIATES INC. Consultants' is on the right. A navigation menu includes Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The main content area is titled 'Manage Invitations' and shows 'User Type (All)' and 'Show Only Pending' checked, with a 'Search' button. Below this, a message states 'No invitations found.' A modal window titled 'Invite Someone' is open, containing the following fields: Provider (ACHIEVEMENTS), First Name (Shari), Last Name (Trudell), Email (sharitrudell@gmail.com), Confirm Email (sharitrudell@gmail.com), User Type (Service Provider), NPI (1164677720), Profession (SLP - Speech & Language Pathologist (058)), and NYS License Number (123456). There is a 'Supervisor' checkbox and a 'Send Invite' button. The footer of the modal reads '© James McGuinness & Associates'.

Creating Service Provider Accounts

- ▶ In addition to creating individual invites, you can upload a spreadsheet with the following format, which can be downloaded from the knowledgebase.

	A	B	C	D	E	F	G
1	First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	NY License
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

Creating Service Provider Accounts

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Manage Invitations

User Type (All) Show Only Pending Search

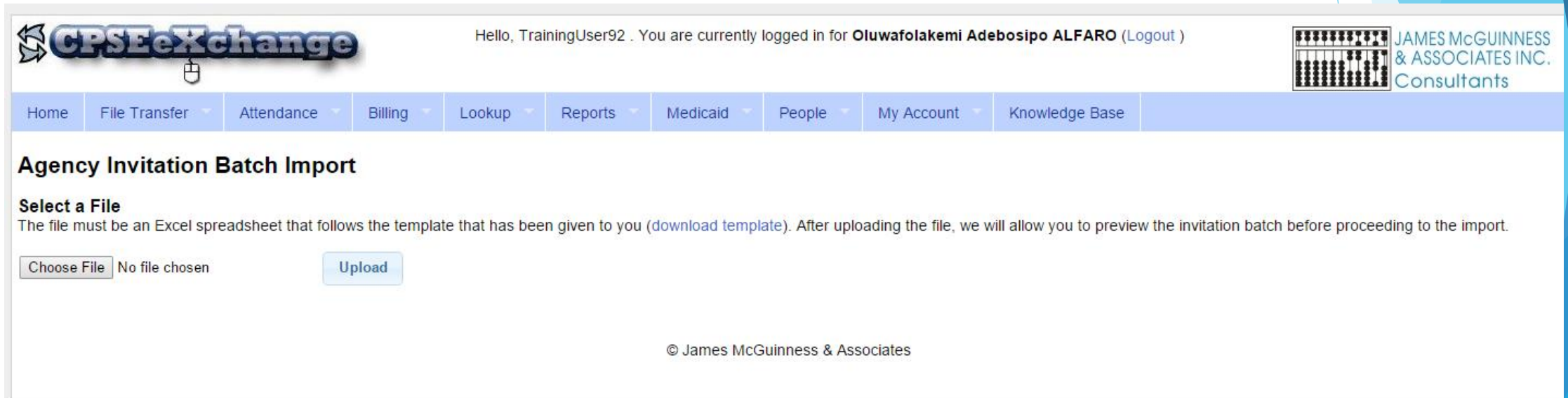
No invitations found.

Invite Someone Import Invitation Batch File

Use this link to go to the upload file screen

© James McGuinness & Associates

Creating Service Provider Accounts



The screenshot displays the CPSEExchange web application interface. At the top left is the logo for CPSEExchange. To its right, a user greeting reads: "Hello, TrainingUser92 . You are currently logged in for **Oluwafolakemi Adebosipo ALFARO** (Logout)". On the top right is the logo for JAMES McGUINNESS & ASSOCIATES INC. Consultants. Below the header is a navigation menu with the following items: Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The main content area is titled "Agency Invitation Batch Import" and includes a "Select a File" section. This section contains the text: "The file must be an Excel spreadsheet that follows the template that has been given to you ([download template](#)). After uploading the file, we will allow you to preview the invitation batch before proceeding to the import." Below this text are two buttons: "Choose File" (which is disabled and shows "No file chosen") and "Upload". At the bottom center of the page is the copyright notice: "© James McGuinness & Associates".

Service Provider accounts for agency



- ▶ Service Provider (teachers, therapists, etc.) will receive an email inviting them to associate with the agency
- ▶ Users that already have an account (from a prior agency/ as an independent, etc.) can associate their existing account to the agency
- ▶ New users will be able to choose username and password
- ▶ They will be asked to enter some basic information including
 - ▶ License information
 - ▶ Credentials to be used with digital signature

Creating Service Provider Accounts

Shari Trudell,

You have been invited to be associated with the agency ACHIEVEMENTS in the CPSEPortal system. Please follow the link below to confirm this invitation, and associate yourself with this agency.

<http://localhost/CPSEPortal/People/Invites/AgencyInvitationResponse.ashx?code=b72b420682ac4ad89c62f90d42f7820b>

(Login)

[Home](#) | [Knowledge Base](#)

CPSEPortal Invitation

You have been invited to be associated with **ACHIEVEMENTS** as a service provider user in the CPSEPortal system. Please confirm your details below, select a username and password and then you may log in to the system. If any of your details are incorrect, please let the agency know and they will re-invite you.

Name Confirmation - Confirm this information is correct.
First Name Last Name
Shari Trudell



Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.
NPI **1164677720**
Profession **SLP - Speech & Language Pathologist (058)**
NYS License Number **123456**

Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.
Email

You appear to already be registered with CPSEPortal
 By accepting this invitation, you are agreeing to associate yourself with this additional billing provider agency.

© James McGuinness & Associates

Creating Service Provider Accounts

(Login)

[Home](#) [Knowledge Base](#)

CPSEPortal Invitation

You have been invited to be associated with **ACHIEVEMENTS** as a service provider user in the CPSEPortal system. Please confirm your details below, select a username and password and then you may log in to the system. If any of your details are incorrect, please let the agency know and they will re-invite you.

Name Confirmation - Confirm this information is correct.
First Name Last Name
Shari Trudell

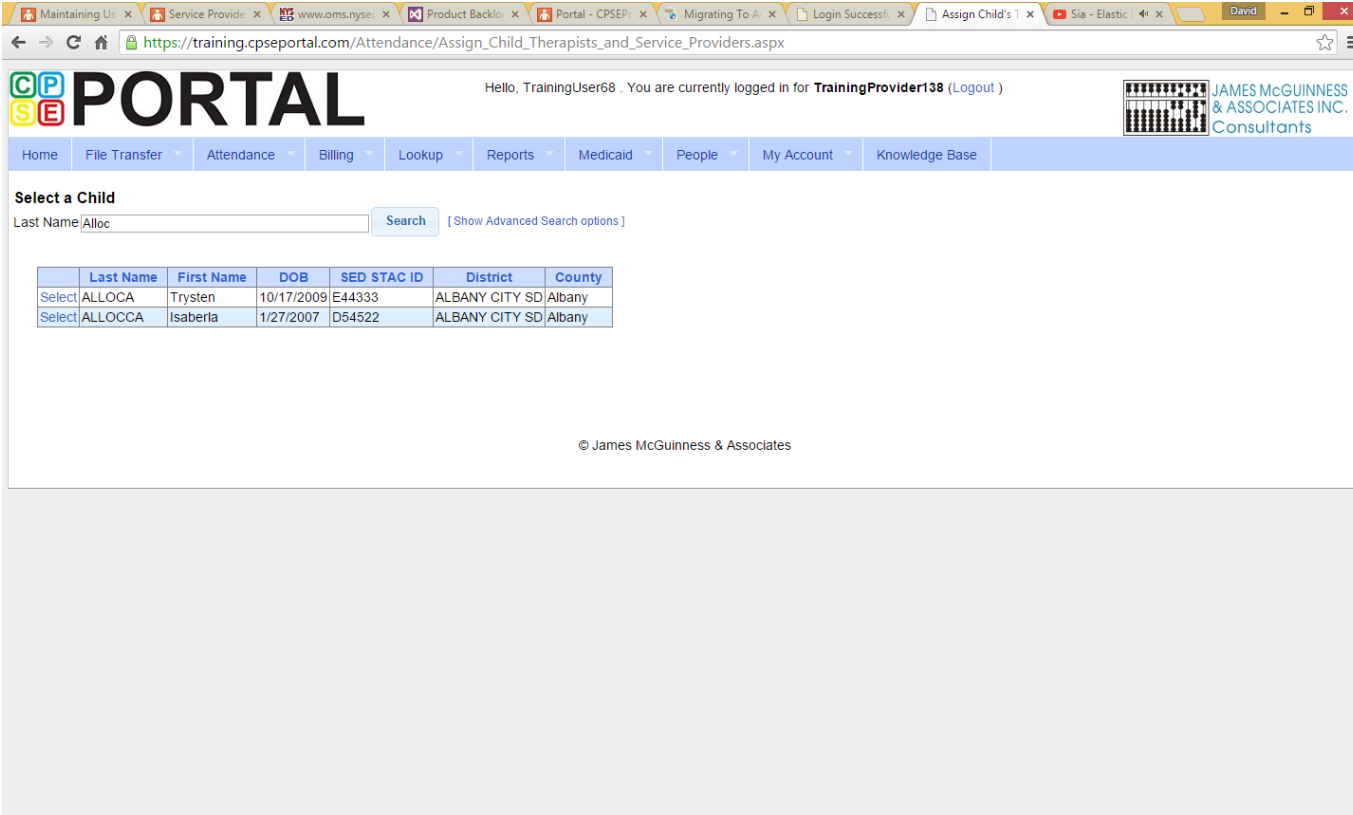
Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.
NPI 1164677720
Profession **SLP - Speech & Language Pathologist (058)**
NYS License Number **123456**
Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP)

Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.
Email

User Account Information
Username
Password Confirm Password

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Assign Children To Therapists

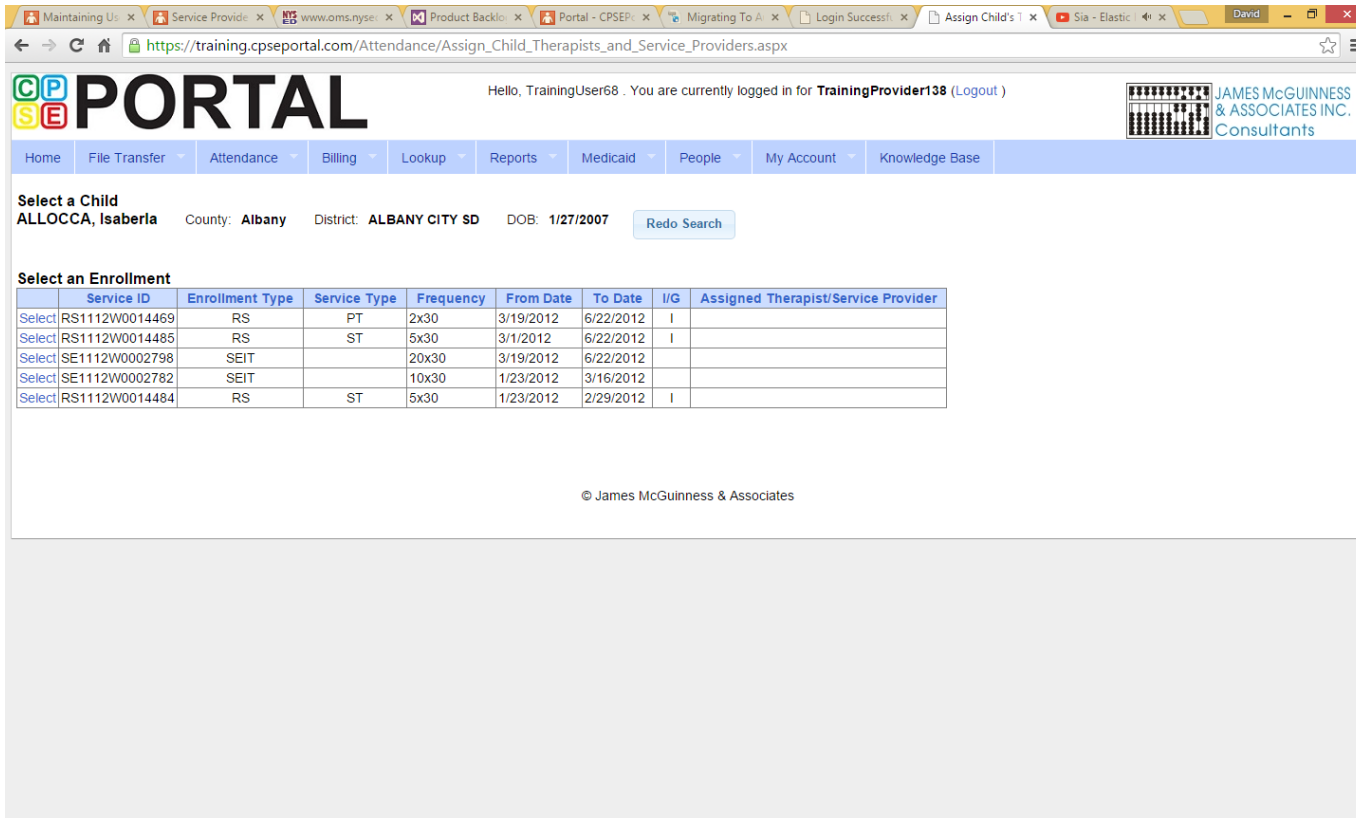


The screenshot shows a web browser window with multiple tabs. The active tab is titled "Assign Child's T" and the address bar shows the URL: https://training.cpseportal.com/Attendance/Assign_Child_Therapists_and_Service_Providers.aspx. The page header includes the "CPSE PORTAL" logo, a user greeting "Hello, TrainingUser68. You are currently logged in for TrainingProvider138 (Logout)", and the logo for "JAMES McGUINNESS & ASSOCIATES INC. Consultants". A navigation menu contains links for Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The main content area is titled "Select a Child" and features a search input field with "Alloc" entered, a "Search" button, and a link for "[Show Advanced Search options]". Below the search field is a table with the following data:

	Last Name	First Name	DOB	SED STAC ID	District	County
Select	ALLOCA	Trysten	10/17/2009	E44333	ALBANY CITY SD	Albany
Select	ALLOCCA	Isaberta	1/27/2007	D54522	ALBANY CITY SD	Albany

At the bottom of the page, there is a copyright notice: "© James McGuinness & Associates".

Assign Children To Therapists



The screenshot shows a web browser window with the URL https://training.cpseportal.com/Attendance/Assign_Child_Therapists_and_Service_Providers.aspx. The page header includes the "CPSE PORTAL" logo, a user greeting "Hello, TrainingUser68 . You are currently logged in for TrainingProvider138 (Logout)", and the "JAMES McGUINNESS & ASSOCIATES INC. Consultants" logo. A navigation menu contains links for Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base.

Select a Child
ALLOCCA, Isabela County: Albany District: ALBANY CITY SD DOB: 1/27/2007

Select an Enrollment

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

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Assign Children To Therapists

Select a Child
ALLOCCA, Isabela County: Albany District: ALBANY CITY SD DOB: 1/27/2007 [Redo Search](#)

Select an Enrollment

Select	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

Assigned Therapists

Last Name	First Name	NPI
<input type="checkbox"/> ADONRI	Cordelle	1326290289
<input type="checkbox"/> ALFARO	Oluwafolakemi Adebosipo	1497907604

[Remove Therapist](#)

Available Therapists

Last Name	First Name	NPI
<input checked="" type="checkbox"/> AFONSO	Yaurdin	176074476
<input type="checkbox"/> AMALFITANO	Mechel	128588857
<input type="checkbox"/> ARISTILDE	Mayana	
<input type="checkbox"/> AUER	Lydia Nicole	
<input type="checkbox"/> BARKET	Leisha	157881310
<input type="checkbox"/> BARKOFF	Ean	179003880
<input type="checkbox"/> BENCAL	Cheikhouna	
<input type="checkbox"/> BHASIN	Daniel David	197285941
<input type="checkbox"/> BODNER	Wakuv	147779985
<input type="checkbox"/> BOTTJER	Eudasia	160901297
<input type="checkbox"/> BOWEN	Rachel Hope	
<input type="checkbox"/> BUCKLEY	William	

[Add Therapist\(s\)/Service Provider\(s\)](#)

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Classroom Management

CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for TrainingProvider138 (Logout)

JAMES MCGUINNESS & ASSOCIATES INC. Consultants

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

[- Collapse Filter]

Filter Classrooms

Session: 2014 - 2015 Winter Program: Active During (Select Month & Year):

Apply Filter

	Class	Description	School Year	Program	# Students	# Teachers	# Aides		
Attendance	Arbor Hill (SY14-15) (0:0:0)	5Hr Program - Robin	2014 - 2015 Winter	9160	7	1	0	Edit Classroom	Assign Children
Attendance	Child's Place (SY14-15) (0:0:0)	5Hr Program - Jaime	2014 - 2015 Winter	9160	2	1	0	Edit Classroom	Assign Children
Attendance	Child's Place(CB)(SY14-15 (0:0:0)	Centerbased 5Hr Program	2014 - 2015 Winter	9100	11	1	0	Edit Classroom	Assign Children
Attendance	Ohav-A (SY14-15) (0:0:0)	5Hr Program - Heather	2014 - 2015 Winter	9160	6	1	0	Edit Classroom	Assign Children
Attendance	Ohav-B (SY14-15) (0:0:0)	5Hr Program - Stella	2014 - 2015 Winter	9160	5	1	0	Edit Classroom	Assign Children
Attendance	Schenectady Day(SY 14-15) (0:0:0)	5.0Hr Program-Lisa	2014 - 2015 Winter	9160	6	1	0	Edit Classroom	Assign Children
Attendance	St.Anthony's(SY 14-15) (0:0:0)	5.0Hr Program-Melissa	2014 - 2015 Winter	9160	7	1	0	Edit Classroom	Assign Children
Attendance	St.Anthony's2.5(SY14-15) (0:0:0)	2.5Hr Program-Katy	2014 - 2015 Winter	9165	11	1	0	Edit Classroom	Assign Children
Attendance	UKids (SY14-15) (0:0:0)	5Hr Program - Carrie	2014 - 2015 Winter	9160	6	1	0	Edit Classroom	Assign Children
Attendance	Van Rensselaer DHH (14-15 (0:0:0)	5Hr Program - Rachel	2014 - 2015 Winter	9160	5	1	0	Edit Classroom	Assign Children

Create New Classroom

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AttendanceImport.xsd Show all downloads...

Classroom Management (Create Classroom)

Attendance - CPSE x www.oms.nysed.g... Product Backlog x Portal - CPSEPort... Migrating To Aut... Login Successful x Create or Edit Clas... Tove Lo - Habil... David

https://training.cpseportal.com/Attendance/Create_Edit_Classroom.aspx

CPSE PORTAL Hello, TrainingUser68 . You are currently logged in for TrainingProvider138 (Logout)

JAMES MCGUINNESS & ASSOCIATES INC. Consultants

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Classroom Information

School Year: 2015 - 2016 Winter Program: -- select --

Name:

Description:

Students: # Teachers: # Aides:

[- Hide Assignments]

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

Assigned to Classroom
No people currently assigned to classroom.

Not Assigned

Select	LastName	FirstName	Role
<input type="checkbox"/>	ADONRI	Cordelle	Teacher
<input type="checkbox"/>	AFONSO	Yaurdin	Teacher
<input type="checkbox"/>	ALFARO	Oluwafolake Adebosipo	Teacher
<input type="checkbox"/>	AMALFITANO	Mechel	Teacher
<input type="checkbox"/>	ARISTILDE	Mayana	Teacher
<input type="checkbox"/>	AUER	Lydia Nicole	Teacher
<input type="checkbox"/>	BARKET	Leisha	Teacher
<input type="checkbox"/>	BARKNEE	E...	Teacher

Select All Unassign -> <- Assign Select All

AttendanceImport.xsd Show all downloads...

Classroom Management (Assign Children)

CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for TrainingProvider138 (Logout)

JAMES McGUINNESS & ASSOCIATES INC. Consultants

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Classroom: Test

Assigned to Classroom

No children currently assigned to classroom.

Select All

Not Assigned [+ Filter Unassigned Children]

Select	Last Name	First Name	District	County	DOB	
<input type="checkbox"/>	ABBOTT	John aka Jack	ALBANY CITY SD	Albany	3/18/2011	De
<input type="checkbox"/>	AMONORTEGA	Joleigh	ALBANY CITY SD	Albany	12/23/2010	De
<input type="checkbox"/>	HERNANDEZFUENTES	Tamiera	ALBANY CITY SD	Albany	11/13/2012	De
<input type="checkbox"/>	ROZENBLAT	Leury	ALBANY CITY SD	Albany	4/12/2012	De
<input type="checkbox"/>	SEPELAK	Yeisan	MENANDS UFSD	Albany	4/6/2011	De

Select All

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Entering Attendance/Session Notes

- ▶ Attendance/Session notes should be entered through the “Weekly Attendance” screen under the Attendance and Billing menu
- ▶ To enter a session, simply click the time on the calendar, select the child, and enter the rest of the required information

Attendance Entry

- ▶ Time In / Time Out
- ▶ Setting (Daycare, home, Preschool)
- ▶ Co-visit with Supervisor
- ▶ Diagnosis
- ▶ CPT Codes
- ▶ Make Up (and date being Made Up)
- ▶ Session Notes

New Session for Apr 7, 2015

Time In: 11:30 AM Time Out: 12:00 PM

1 x minute session(s) Setting: Not Selected

Co-Visit with Supervisor

[Child 1]

Child: Not Selected

Primary Diagnosis Code: Not Selected

[Set ICD Code as Default For This Enrollment]

CPT Codes: Lookup	Units:
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Make Up Does Not Meet Medicaid Requirements

Session Notes:

save cancel

Entering Attendance on Calendar

Weekly Attendance

Doe, Jane - SLP Jump To: 04/05/15 **Save**

<< today >> **Apr 05, 2015 - Apr 11, 2015**

	Sunday Apr 05, 2015	Monday Apr 06, 2015	Tuesday Apr 07, 2015	Wednesday Apr 08, 2015	Thursday Apr 09, 2015	Friday Apr 10, 2015
8AM						
9AM						
10AM			10:15 am to 10:45 am Smith, Mark			
11AM						
12PM						
1PM						
2PM						
3PM						
4PM						

Therapist Activity Report


CPSExchange **Therapist Activity** *Printed: 6/24/2015 4:39:15 PM*
Page 2 of 69
BOTTJER, Eudasia

Date / Time	Setting	Child	ICD/CPT Codes	Notes	
09/06/13 In: 12:15PM Out: 12:45PM	Daycare	AQUILA, JOHN GARRETT CBRS1314W0011775(ST- g)	315.32 92508x1	THESE NOTES ARE FOR DEMONSTRATION PURPOSES ONLY.	Notes Entered: 10/9/2013 11:56:44 AM Notes Last Modified: 6/23/2015 6:10:10 PM Signed: 10/10/2013 DEMO CREDENTIALS Cosigned: 10/10/2013 NOT COSIGNED Meets Medicaid Requirements: N/A
09/09/13 In: 12:30PM Out: 01:00PM	Daycare	AQUILA, JOHN GARRETT CBRS1314W0011774(ST- i)	315.32 92507x1	THESE NOTES ARE FOR DEMONSTRATION PURPOSES ONLY.	Notes Entered: 10/9/2013 11:56:44 AM Notes Last Modified: 6/23/2015 6:10:10 PM Signed: 10/10/2013 DEMO CREDENTIALS Cosigned: 10/10/2013 NOT COSIGNED Meets Medicaid Requirements: N/A

Classroom Attendance Report

Attendance x www.oms.nj x Product Back x Portal - CPSI x Migrating To x Login Succes x Classroom A x https://traini x Tove Lo - Hi x 5 Most U x David

← → ↻ 🏠 https://training.cpseportal.com/Reports/Classroom_Attendance_Output.aspx?cid=438&sd=9%2F01%2F2014&ed=6%2F30%2F2015 ☆ ☰



Classroom Attendance

Printed: 6/24/2015 4:51:06 PM
Page 1 of 1

Classroom: Child's Place(CB)(SY14-15)
Month: 4/2015

Attendance Legend
U - Unsigned S - Signed

	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T
Child Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
ABBOTT, John aka Jack	S	S											S	S	S	S	S			S	S	S	S	S			S	S	S	
ABIKZER, Tremaine	S													S	S					S	S	S							S	S
AMONORTEGA, Joleigh	S	S											S	S	S	S	S			S	S	S	S	S			S	S	S	
BLUMBERG, Sayad	S	S											S	S	S	S	S			S	S	S	S	S			S	S	S	
DANTONA, Vincent Micheal	S	S											S	S	S	S	S			S	S	S	S	S			S	S	S	
IANNOTTI, Korveh	S												S	S	S	S	S			S	S	S	S	S			S	S	S	
MEDINAESPINOZA, Gregory	S	S											S	S	S	S	S			S	S	S	S	S			S	S	S	
RAMGOOLAN, Jaely	S	S											S	S	S	S	S			S	S	S	S	S			S	S	S	
SEPELAK, Yeisan																														
SEPELAK, Yeisan	S	S												S	S	S	S			S	S	S	S	S			S	S	S	
VAITKUS, Zymea													S	S	S	S	S			S	S	S	S	S			S	S	S	

FAQ/Links

- ▶ <https://www.cpseportal.com>
- ▶ <http://support.cpseportal.com>
- ▶ support@cpseportal.com