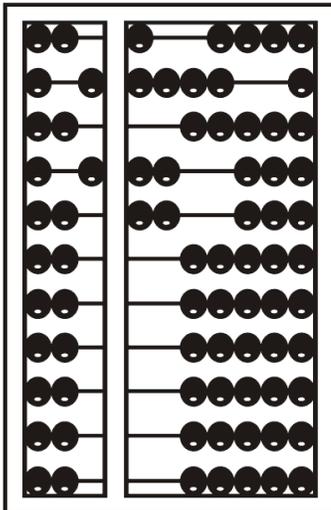


JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants



# Welcome to CPSE Portal Introduction Kick-Off and Initial Setup



# What Is The CPSE Portal

# CPSE Portal

- \* CPSE Portal is a web based system that provides a mechanism for exchanging data between the County and its providers.
- \* One component of this system is capturing session notes / treatment logs for provided services.

# Features

- \* What will functionality County vendors utilize?
  - \* Recording service providers and their credentials (NPI, license, etc.)
  - \* Entering Treatment logs for:
    - \* SEIT services
    - \* Related Services including both fee for service as well as services provided as part an approved center based preschool program
  - \* Entering attendance (Present/Absent) for children attending a Center Based preschool program.
  - \* Generating electronic bills to the county for SEIT, Related Services and Center Based Tuition billing.

# Three Types Of Provider Users

- \* **Agency Administrators:**

- \* These individuals work for an agency.
- \* They perform tasks as a vendor related to billing.
- \* They also perform caseload management tasks such as assigning therapist to children, assigning children to classrooms (for center based children).

- \* **Agency Service Providers:**

- \* These individuals work for an agency as a therapist.
- \* Their role is entering and signing session notes.

- \* **Independent Providers:**

- \* They are a service provider that performs the same tasks as an agency service provider.
- \* They are a vendor that contracts directly the county and thus also has the role of billing administrator.

# How Do Users Get Logins

- \* The process is done by “invitations”.
- \* An invitation is created to invite the individual to create a login for an agency.
- \* The individual uses this invitation to create a username and password to the system.
  - \* This process will be covered at the end of the webinar.
- \* For Agencies: the County will create an initial invitation for an administrator. That administrator will then invite additional users for their agency.
- \* The County will also create an initial invitation for the Independent Provider.
- \* If you are already using CPSE Portal for another County, that same username will be used.

# Process Overview - Independent Providers

- \* County uploads list of children and their services (enrollments).
- \* Provider enters session notes / treatment logs for the enrollments.
- \* The provider digitally signs the session notes / treatment logs.
- \* Billing Provider bundles signed entries into an electronic voucher.
- \* Billing Provider digitally signs and submits electronic voucher to County.

# Process Overview – Agency SEIT / Related Service Providers

- \* County uploads list of children and their services (enrollments).
- \* Agency administrator assigns the children's services to a SEIT / therapist.
- \* The SEIT / therapist enters session notes / treatment logs for the enrollments.
- \* The SEIT / therapist digitally signs the session notes / treatment logs.
- \* Agency administrator bundles signed entries into an electronic voucher.
- \* Agency administrator digitally signs and submits electronic voucher to County.

# Process Overview – Approved 4410 Preschool Center Based Program

- \* County uploads list of Center Based children and their included related services (CB and CBRS enrollments).
- \* Agency administrator assigns children to various classrooms.
- \* Agency administrator assigns the children's included related services to therapist.
- \* An agency administrator or classroom teacher records children's classroom attendance (present / absent / closed).
- \* The therapist enters session notes / treatment logs for the CBRS enrollments.
- \* The therapist digitally signs the session notes / treatment logs.

# Process Overview – Approved 4410 Preschool Center Based Program

- \* An agency administrator or classroom teacher digitally signs a monthly attendance log for the classroom.
- \* Agency administrator creates an electronic voucher for all Center Based children.
- \* Agency administrator creates a zero dollar electronic voucher for all Center Based children's corresponding included services (CBRS).
- \* Agency administrator digitally signs and submits electronic vouchers to County.

# Training Webinars

- \* Over the next few months we will be holding training webinars on various topics.
- \* In order to maximize relevancy, the timing of the webinars will correspond to the stage of the implementation. For example, we won't be training on how to create a billing voucher in May, since that won't be used until August.
- \* Each webinar will have a different target audience such as:
  - \* Independent Provider
  - \* Agency Service Providers
  - \* Agency Service Providers and Independent Providers
  - \* Agency Administrators
  - \* Center Based Agency Administrators
  - \* Agency Administrators and Independent Providers



# **Initial Set-Up For Agency Service Providers And Independent Providers**



# Portal Invitations

# CPSE Portal

**CPSE PORTAL** Hello, kkr [redacted]. You are currently logged in for **ADMIN** (Logout)

**JAMES MCGUINNESS & ASSOCIATES INC. Consultants**

Home Activities IEP eSTACs Attendance Billing Lookup Documents Reports Maintenance Medicaid Service Bureau Medicaid **People My Account Knowledge Base**

User Profile

Username: **kk**  
First Name:  
Last Name:  
Email: **kk** .com

[Edit User Account](#)

News Feed

[View All Your Articles](#)

New CPSE Portal features for 2020-2021  
**7/7/2020** [more](#) [dismiss](#)  
A new version of CPSE Portal arrives on 7/8

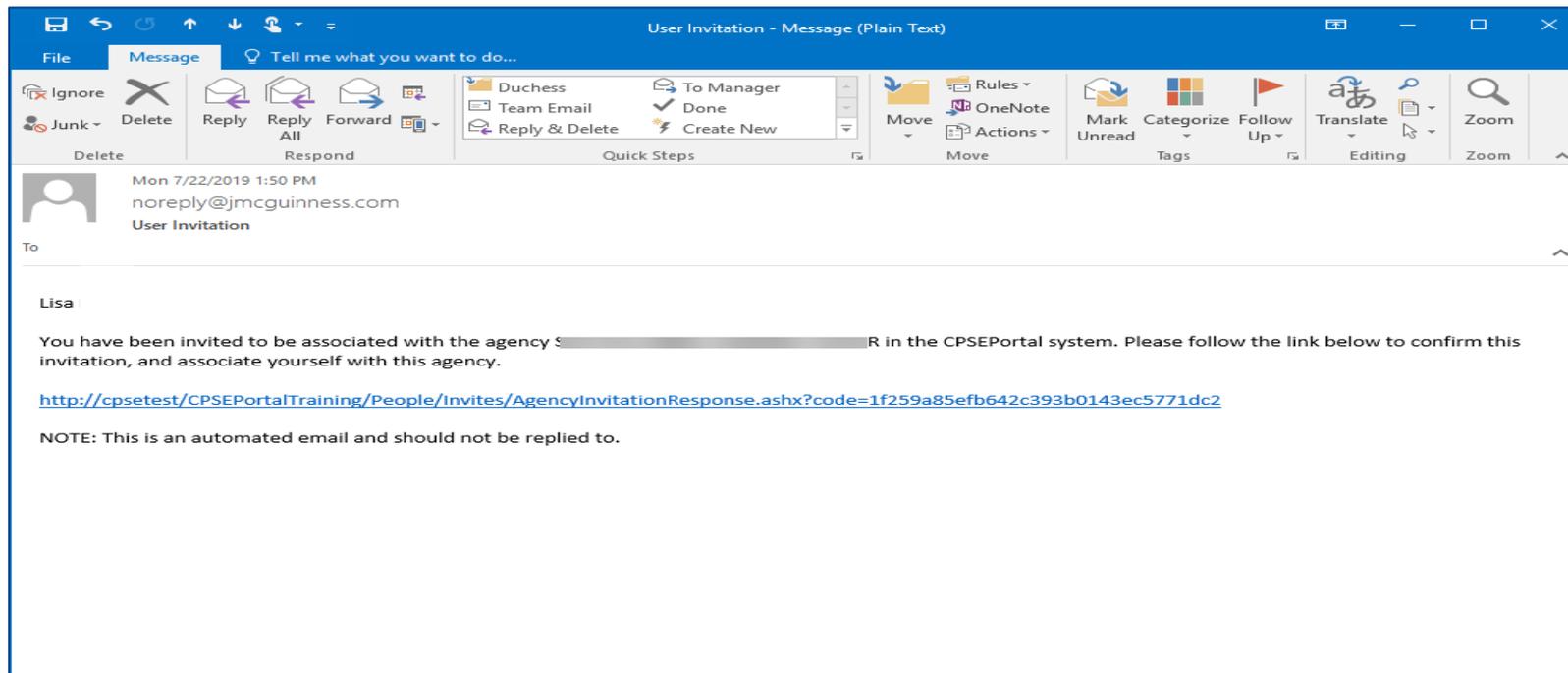
© James McGuinness & Associates

# Portal Invitations

- \* The agency is the primary link between the CPSE Portal & service providers.
- \* Agencies will send an email invitation to a Service Provider to join the Portal.
- \* The service provider will click the link in the email and set up your username, password, and PIN.
- \* The county will send Independent Providers an email invitation to join the Portal.
- \* Independent providers will need to click the link in the email and set up your username, and password, and create a PIN for submitting vouchers to the county.
- \* When creating your log on information, make sure that your **NPI, license number, and email address** are correct. This is especially important for service providers who work for multiple agencies.

# Portal Invitations - Sample Email Invite

After the agency or county sends out the invitation, the service provider or independent provider will receive the following email. The provider will click the link to set up their account in the Portal. The email will come from ***noreply@CPSEPortal.com***.



# Portal Invitations – Accepting Invitation

This screen comes up after the provider clicks the link. The service provider/independent provider will confirm everything that is shown with the red arrow, and will fill in all the yellow arrow information and then click the “**Accept Invitation**” button. At this point, the invitation process is complete.

The screenshot shows the CPSEPortal Invitation form. At the top left is the CPSE PORTAL logo and a (Login) link. At the top right is the logo for JAMES MCGUINNESS & ASSOCIATES INC. Consultants. Below the header is a navigation bar with 'Home' and 'Knowledge Base' links. The main content area is titled 'CPSEPortal Invitation' and contains the following sections:

- Name Confirmation - Confirm this information is correct.** Fields for First Name and Last Name. Red arrows point to the Last Name field.
- Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.** Fields for NPI (12), Profession (OT - Licensed Occupational Therapist (062)), NYS License Number (00), and Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP). Red arrows point to the Profession, NYS License Number, and Signature fields. A yellow arrow points to the Signature field.
- Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.** Email field. A yellow arrow points to the Email field.
- User Account Information** Username, Password, and Confirm Password fields. Yellow arrows point to the Username, Password, and Confirm Password fields.

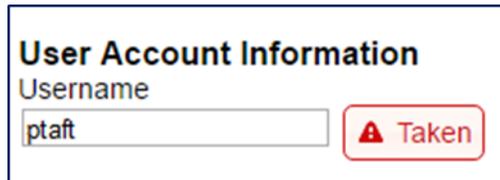
At the bottom of the form is an 'Accept Invitation' button and a copyright notice for © James McGuinness & Associates.



# Choosing Username, Password and PIN

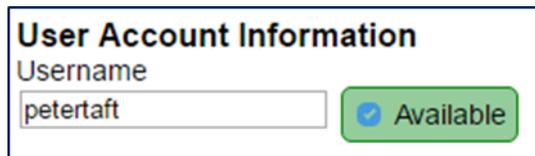
# Choosing Username and Password

- \* Choose a good username that can be remembered (name, email address, first initial & last name, etc.)
- \* If your desired username is in use by somebody else, the screen will show you:



**User Account Information**  
Username  
 ⚠ Taken

- \* If your preferred username is unavailable, try again until you find an available one:

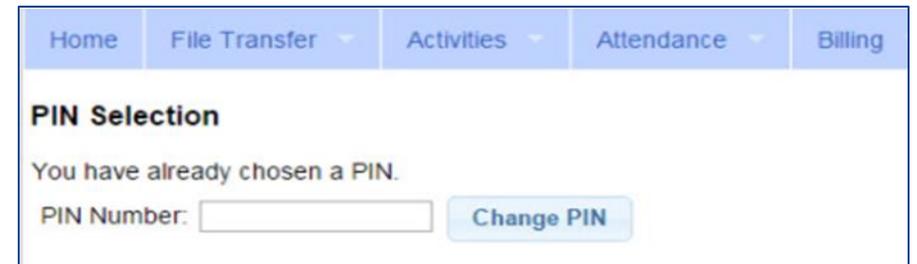


**User Account Information**  
Username  
 ✔ Available

- \* Choose a password that is strong but that you can remember and reenter to confirm it.

# Choosing Your PIN

- \* Go to **My Account -> My Pin**
- \* Enter your PIN number and click the button (“Choose PIN” for first time PIN setup, “Change PIN” for changing current PIN)
- \* Enter your login password (NOT your pin) to confirm your PIN change and click “Proceed”
  - \* <http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>



The screenshot shows a navigation bar with links for Home, File Transfer, Activities, Attendance, and Billing. Below the navigation bar is a section titled "PIN Selection". The text reads "You have already chosen a PIN." Below this text is a text input field labeled "PIN Number:" and a blue button labeled "Change PIN".



The screenshot shows a "Password Verification" dialog box. The text reads "For additional security, please re-enter your login password." Below this text is a text input field labeled "Password" and a blue button labeled "Proceed".

# Resetting Forgotten Passwords

- \* If you have forgotten your password you do not need to contact CPSE Portal support. You can reset your own password by using the Forgot Your Password? link on the Log In screen.
- \* On the Password Recovery page, enter your user name and click Submit. You will be emailed a new password.
- \* <http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316>

CPSE PORTAL (Login)

Home Knowledge Base

**Log In**

User Name:  \*

Password:  \*

Remember me next time.

[Forgot your password?](#)

**Password Recovery**

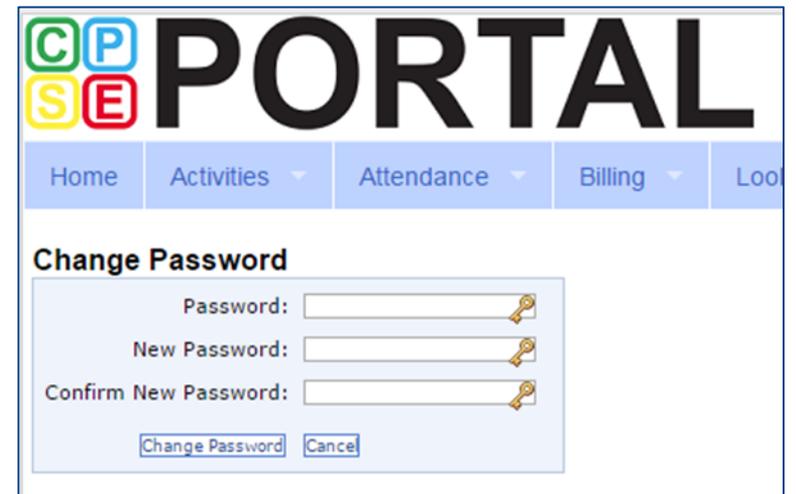
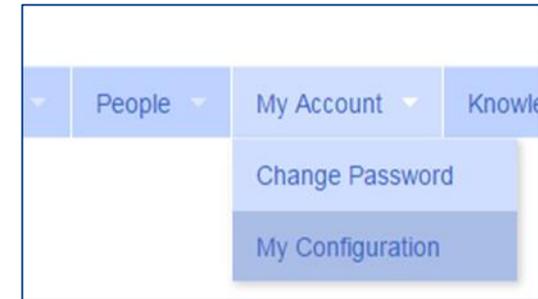
**Forgot Your Password?**

Enter your User Name to receive your password.

User Name:

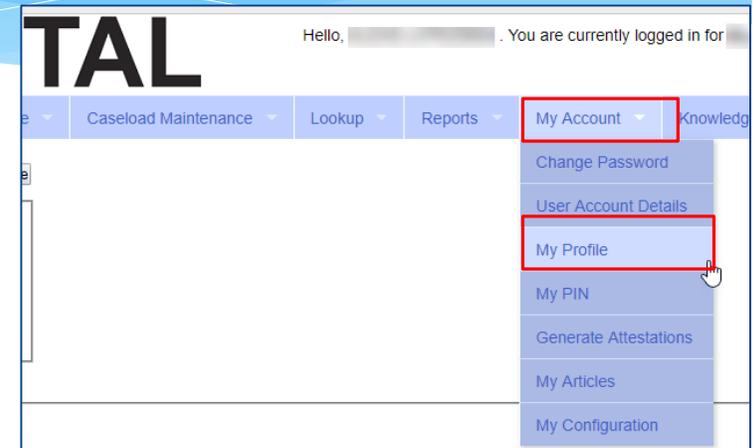
# Changing Your Password

- \* Go to **My Account -> Change Password**.
- \* Enter your current password in the password field.
- \* Enter your New Password.
- \* Re-enter your New Password to confirm it was entered correctly.
- \* <http://support.cpseportal.com/kb/a14/change-password.aspx?KBSearchID=16315>

A screenshot of the CPSE Portal's 'Change Password' form. The form is titled 'Change Password' and contains three password input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a key icon to its right. At the bottom of the form, there are two buttons: 'Change Password' and 'Cancel'. The portal's logo 'CPSE PORTAL' and a navigation bar with 'Home', 'Activities', 'Attendance', 'Billing', and 'Log' are visible at the top.

# Edit My User Information

- \* Go to **My Account** -> **My Profile** & click on “User Information” tab.
- \* This screen may be used to update user name and/or email address.
- \* Click “Update” and you will receive the following message: User Information Updated Successfully
- \* My Profile:
  - \* <http://support.cpseportal.com/kb/a59/edit-my-user-information.aspx?KBSearchID=16250>

A screenshot of the 'My Profile' page. It features three tabs: 'Personal and Professional', 'User Information', and 'Favorites'. The 'User Information' tab is active. The form contains four input fields: 'Username', 'Last Name', 'First Name', and 'Email'. Below the fields is an 'Update' button.



**Independent Providers ONLY**

# Billing Provider Profile – Independent Providers **ONLY**

- \* Independent Providers **ONLY** will need to create a Billing Provider Profile in order to bill the county.
- \* Go to **My Account -> Billing Provider Profile**



# Billing Provider Profile – Independent Providers ONLY

All information entered on this screen will **ONLY** be the Independent Providers information.

**Billing Provider Profile**

Provider Info | User Information

**Billing Provider**  
Name

**Billing Address**  
Address 1   
Address 2   
City  State NY Zip   
Phone Number

Information from NPPES NPI Registry  
[Click here for NPPES website](#)

NPI  This NPI is for an

Organization Name

Mailing Address 1   
Mailing Address 2   
City  State NY Zip

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	252Y00000X	Agencies	Early Intervention Provider Agency			



# NEWS FEED

# News Feed / My Articles

News Feed contains current articles and updates to the Portal. News Feed can be found in 2 ways.

Your current News Feed will be located on your Home Page

For all News Feed articles:  
**My Account -> My Articles -> View**

The screenshot shows the CPSE Portal Home Page. The top navigation bar includes links for Home, File Transfer, Activities, eSTACs, Attendance, Billing, Caseload Maintenance, Lookup, Documents, Reports, and Medicaid. Below this, there are sub-links for People, My Account, and Knowledge Base. On the left, there is a User Profile section with fields for Username, First Name, Last Name, and Email, along with an Edit User Account link. On the right, the News Feed section is highlighted, showing a list of articles with dates and 'more' links. The footer contains the copyright notice for James McGuinness & Associates.

The screenshot shows the CPSE Portal My Account -> My Articles -> View page. The top navigation bar includes links for Home, Activities, IEP, eSTACs, Attendance, Billing, Lookup, Documents, Reports, Maintenance, and Medicaid Service Bureau. Below this, there are sub-links for Medicaid, People, My Account, and Knowledge Base. The main content area displays a news feed article titled "New CPSE Portal features for 2020-2021" dated 7/7/2020. The article body describes a new version of the CPSE Portal and lists Knowledge Base articles for more information. A "See Also" section contains a table with links to various Knowledge Base articles. The footer contains the copyright notice for James McGuinness & Associates.

Description	Link
Creating a School Schedule	support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx
Entering SEIT, RS and CBRS attendance	support.cpseportal.com/kb/a229/entering-attendance-for-seit-rs-enrollments.aspx
Entering Classroom Attendance	support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=14096



# Initial Set-Up For Agencies



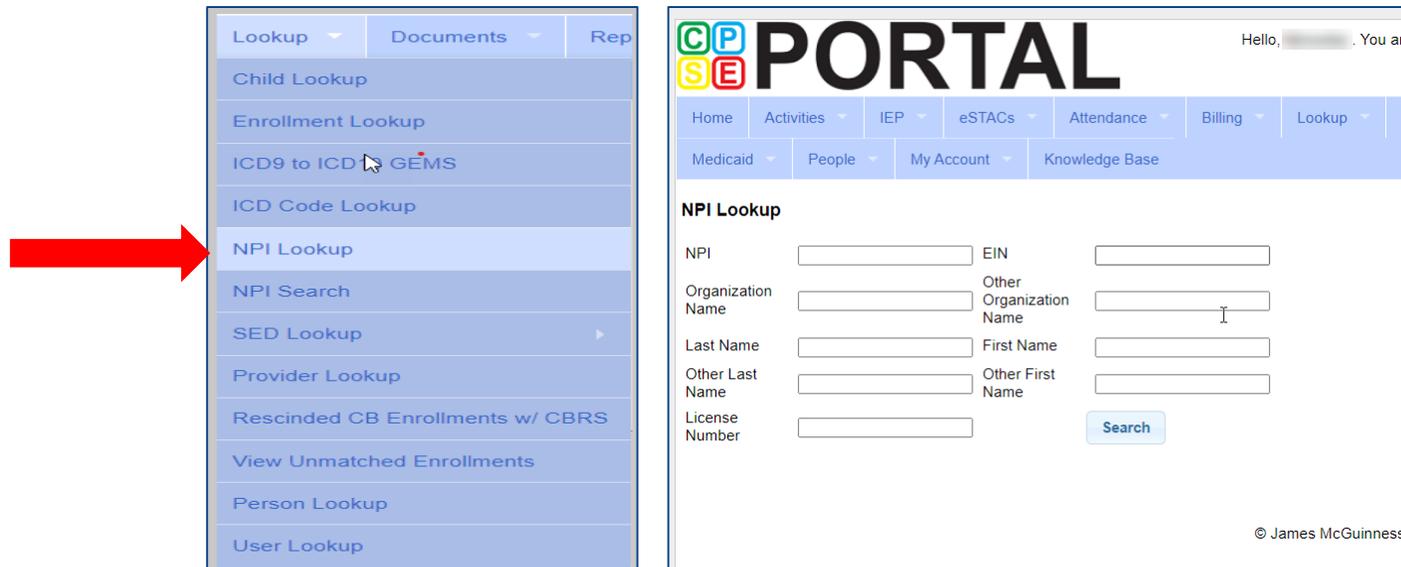
# Portal Invitations

# Portal Invitation Process for Agency

- \* The agency is the primary link between the CPSE Portal & service providers.
- \* The agency will be sent an email invitation to join the Portal.
- \* You will click the link in the email and setup your password and PIN.
- \* Ensure NPI/BEDS code are correct.
- \* Billing providers will need to create a PIN for submitting vouchers to the county.
- \* An agency will get **one** invitation, and then they can invite staff as appropriate.
- \* If you already use the Portal, the county will link your current logon to their county.
- \* When inviting service providers, **make sure** that their **NPI, license number, and email address** are correct. This is especially important when a service provider works for multiple agencies.

# NPI Lookup

If you need to invite a service provider and do not know their NPI #, you can search for them using the NPI Lookup feature on the Lookup Menu. Go to **Lookup -> NPI Lookup**.



The image displays two screenshots from the CPSE Portal. The left screenshot shows a navigation menu with the 'Lookup' dropdown expanded, highlighting the 'NPI Lookup' option with a red arrow. The right screenshot shows the 'NPI Lookup' search form, which includes input fields for NPI, EIN, Organization Name, Last Name, Other Last Name, License Number, Other Organization Name, First Name, and Other First Name, along with a 'Search' button. The portal header includes the CPSE logo and the word 'PORTAL'.

**CPSE PORTAL**

Hello, [User Name]. You are

Home | Activities | IEP | eSTACs | Attendance | Billing | Lookup | [User Name]

Medicaid | People | My Account | Knowledge Base

**NPI Lookup**

NPI  EIN

Organization Name  Other Organization Name

Last Name  First Name

Other Last Name  Other First Name

License Number

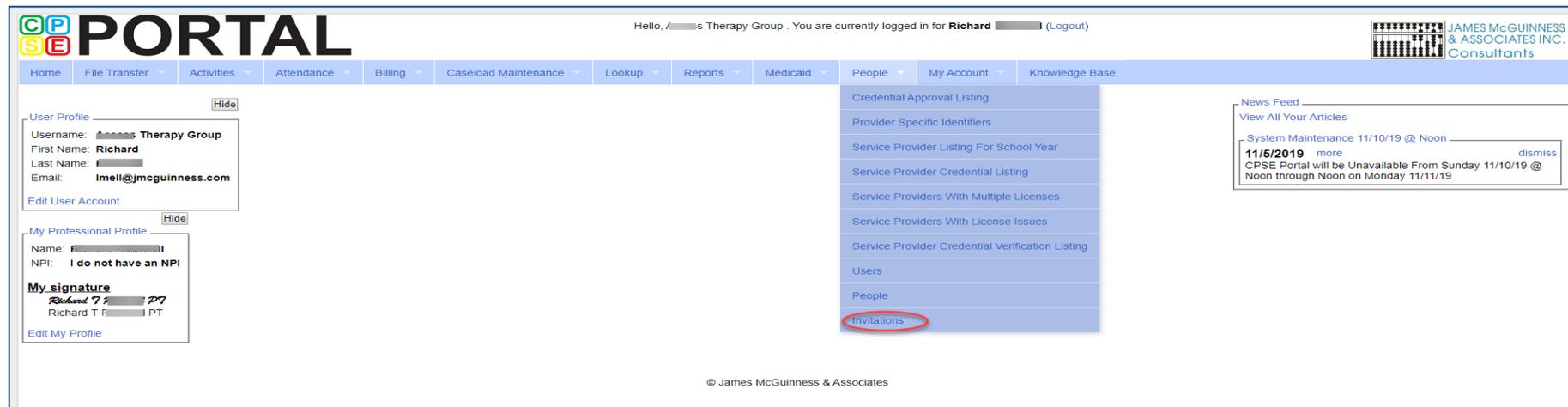
© James McGuinness



# **Portal Invitations – Single Service Provider Invite**

# Portal Invitations – Single Service Provider Invite

Agencies will send an invitation to a Service Provider. A service provider is a person who is an individual who provides services to the child. To send an invitation, go to **People -> Invitations**.



The screenshot displays the CPSE Portal interface. At the top left is the logo with 'CPSE' in colored boxes and 'PORTAL' in large black letters. The top right shows the user's name 'Richard' and a 'Logout' link. A navigation bar contains several menu items: Home, File Transfer, Activities, Attendance, Billing, Caseload Maintenance, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The 'People' menu is expanded, showing a list of options: Credential Approval Listing, Provider Specific Identifiers, Service Provider Listing For School Year, Service Provider Credential Listing, Service Providers With Multiple Licenses, Service Providers With License Issues, Service Provider Credential Verification Listing, Users, People, and Invitations. The 'Invitations' option is circled in red. On the left side, there are two profile sections: 'User Profile' with fields for Username (Therapy Group), First Name (Richard), Last Name, and Email (imell@jmcguinness.com); and 'My Professional Profile' with fields for Name, NPI (I do not have an NPI), and a signature block for Richard T. PT. A 'News Feed' on the right contains a system maintenance notice for 11/5/2019. The footer at the bottom center reads '© James McGuinness & Associates'.

# Portal Invitations – Single Service Provider Invite

After you click Invitations, the following screen appears. Fill in all of the service providers information. Note that the service providers name & credentials will appear next to their NPI #. Make sure this information is correct before clicking **“Send Invite.”**

**Invite Someone**

First Name: Lisa  
Last Name: Smith

Email: Lsmith@gmail.com  
Confirm Email: Lsmith@gamil.com

Provider: INC  
User Type: Service Provider

Profession: OT - Licensed Occupational Therapist

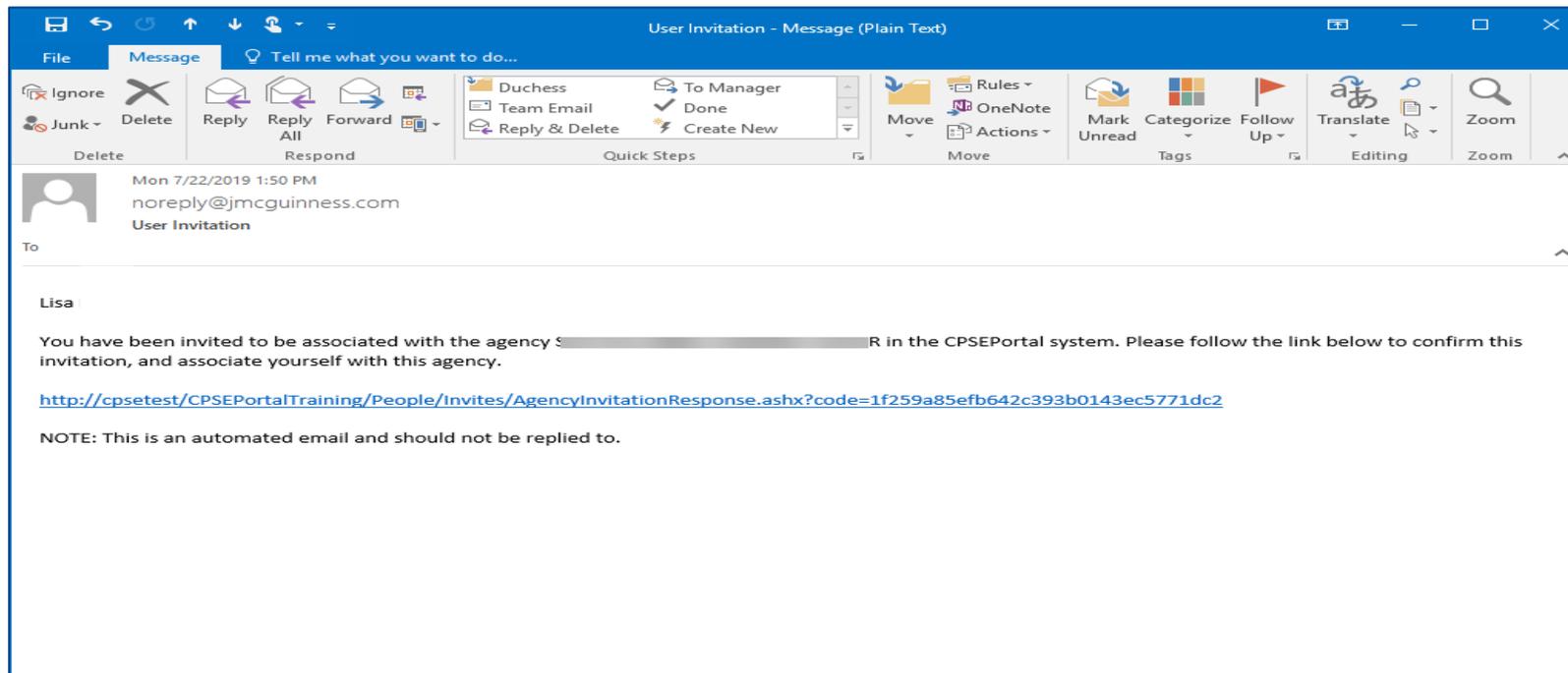
NPI: 1083193270  
LISA SMITH, DOT, OTR

NYS License Number: 013595

**Send Invite**

# Portal Invitations – Single Service Provider Invite Sample Email

After the agency sends out the invitation, the service provider will receive the following email. The service provider will click the link to set up their account in the Portal. The email will come from ***noreply@CPSEPortal.com***.



# Portal Invitations – Single Provider Invite

## Accepting Invitation

This screen comes up after the service provider clicks the link. The service provider will confirm everything that is shown with the red arrow, and will fill in all the yellow arrow information and then click the “**Accept Invitation**” button. At this point, the invitation process is complete.

The screenshot shows the CPSEPortal Invitation acceptance page. The page header includes the CPSEPortal logo, a (Login) link, and the logo for James McGuinness & Associates Inc. Consultants. The main content area is titled "CPSEPortal Invitation" and contains the following sections:

- Name Confirmation - Confirm this information is correct.** Fields for First Name and Last Name are shown with red arrows pointing to them.
- Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.** Fields for NPI, Profession (OT - Licensed Occupational Therapist (062)), NYS License Number (00), and Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP) are shown with red arrows pointing to them. A yellow arrow points to the Signature field.
- Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.** The Email field is shown with a yellow arrow pointing to it.
- User Account Information** Fields for Username, Password, and Confirm Password are shown with yellow arrows pointing to them.

At the bottom of the form is an "Accept Invitation" button. The footer of the page contains the copyright notice "© James McGuinness & Associates".



# **Portal Invitations – Invite Multiple Service Providers**

# Portal Invitations – Invite Multiple Users

- \* As an alternative the agency can also invite “multiple” service providers at once by completing the template shown below. When complete, this template is imported and all service providers listed in the template will receive the email invitation. Service provider information needed is: *First Name, Last Name, Email, NPI & Profession Code.*

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Email	Provider Specific ID	NPI	Profession Code	NY License	License From Date	License To Date
2									
3									
4									
5									
6									

- \* Additional information can be found in the Knowledge Base:
- \* <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175> or (search for “template” or invitations”).

# Portal Profession Codes

- \* The Portal Profession Codes must be entered on the template and can be found in the Knowledge Base article below.
- \* <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175> or (search for “template” or invitations”).

The list of profession codes that can be used:

Profession Code	Description
AIDE	Classroom or 1:1 AIDE
AUD	Audiologist
CFY	Clinical First Year
COTA	Certified Occupational Therapist Assistant
CSP	Certified School Psychologist
CSW	Clinical Social Worker
INT	Bilingual Interpreter
LCSW	Licensed Clinical Social Worker
LMSW	Licensed Master Social Worker
LPN	Licensed Practical Nurse
MUS	Music Therapist
OT	Occupational Therapist (Registered)
OTA	Occupational Therapist Assistant
PSY	Licensed Psychologist
PT	Physical Therapist
PTA	Physical Therapist Assistant
RN	Registered Nurse
SLP	Speech & Language Pathologist
SPED	Special Education Teacher
TD	Teacher of the Deaf
TEACH	Teacher
TSHH	Teacher of Speech & Hearing Handicapped
TSLD	Teacher of Speech & Language Disabilities
TVI	Teacher of the Visually Impaired

# Invitations – Multiple User Template

To send an invitation using the template, go to **People -> Invitations**.



# Invitations – Multiple User Template

You will then choose ***Import Invitation Batch File.***

### Manage Invitations

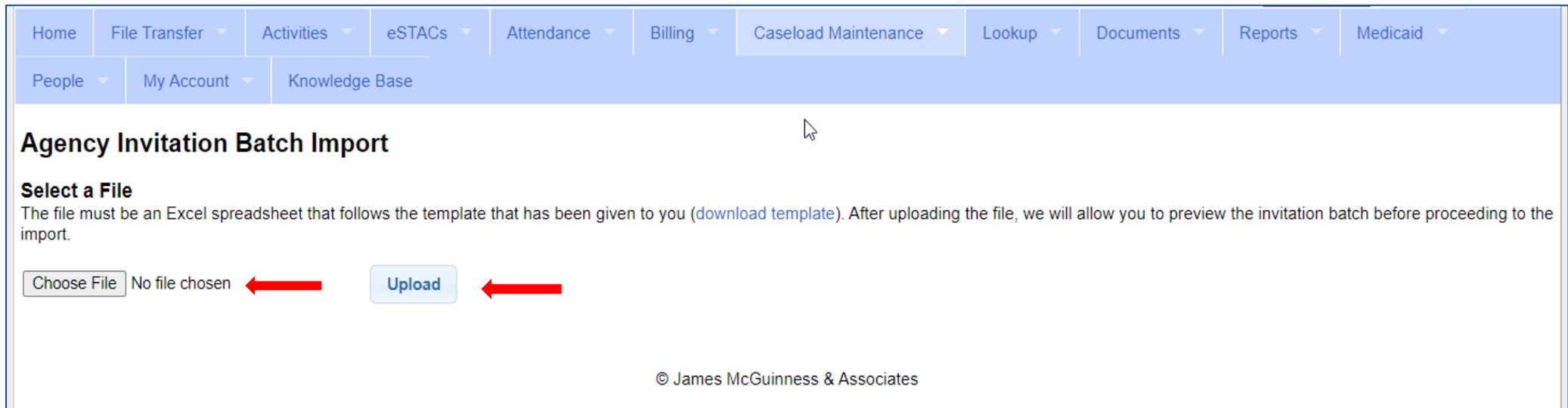
User Type  Show Only Pending

No invitations found.



# Invitations – Multiple User Template Upload Template

You will then click Choose File, find your template, and click Upload.



The screenshot displays a web application interface for "Agency Invitation Batch Import". At the top, there is a navigation menu with the following items: Home, File Transfer, Activities, eSTACs, Attendance, Billing, Caseload Maintenance, Lookup, Documents, Reports, and Medicaid. Below this, there are three more menu items: People, My Account, and Knowledge Base. The main content area is titled "Agency Invitation Batch Import" and includes a section "Select a File" with the instruction: "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 the text, there is a file selection interface consisting of a "Choose File" button, the text "No file chosen", and an "Upload" button. Two red arrows point to the "Choose File" and "Upload" buttons respectively. At the bottom of the page, the copyright notice "© James McGuinness & Associates" is visible.

# Invitations – Multiple User Template

## Preview Invitations

- \* This screen will show problems as well as successful imported entries.
- \* Click either “Accept & Send Invites” or “Decline & Cancel”.

**Agency Invitation Batch Import**

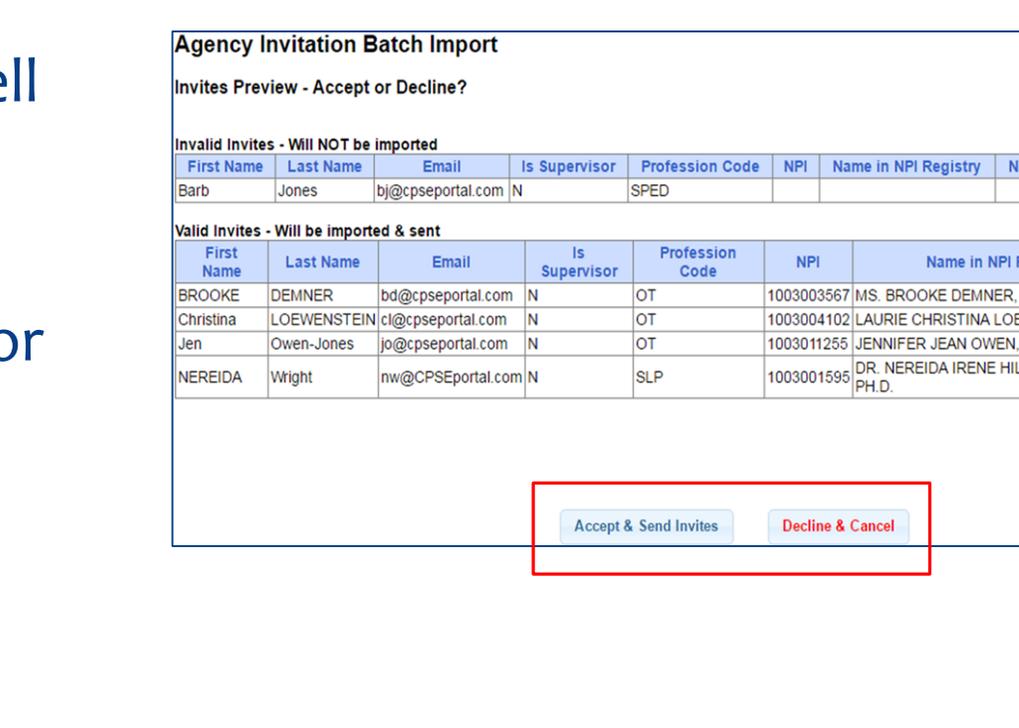
Invites Preview - Accept or Decline?

Invalid Invites - Will NOT be imported

First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	Name in NPI Registry	NY License Number	Invalid Reason
Barb	Jones	bj@cpseportal.com	N	SPED				"NPI" must be valid

Valid Invites - Will be imported & sent

First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	Name in NPI Registry	NY License Number
BROOKE	DEMNER	bd@cpseportal.com	N	OT	1003003567	MS. BROOKE DEMNER, OTR	123456
Christina	LOEWENSTEIN	cl@cpseportal.com	N	OT	1003004102	LAURIE CHRISTINA LOEWENSTEIN, OTR	556677
Jen	Owen-Jones	jo@cpseportal.com	N	OT	1003011255	JENNIFER JEAN OWEN, OTR	888222
NEREIDA	Wright	nw@CPSEportal.com	N	SLP	1003001595	DR. NEREIDA IRENE HILLYER-WRIGHT, PH.D.	554433

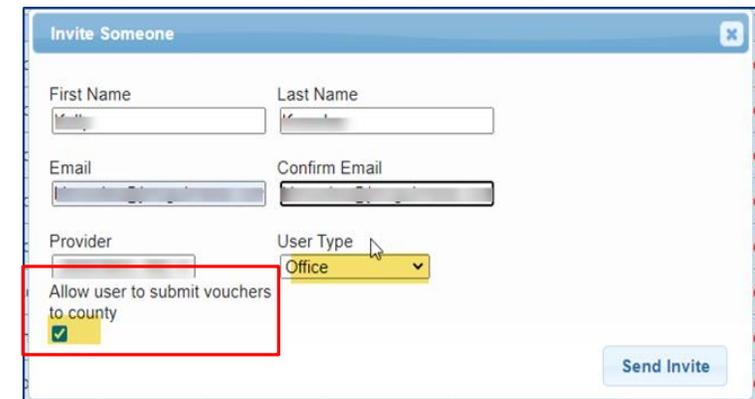




# Portal Invitations – Office Users

# Portal Invitation – Office User

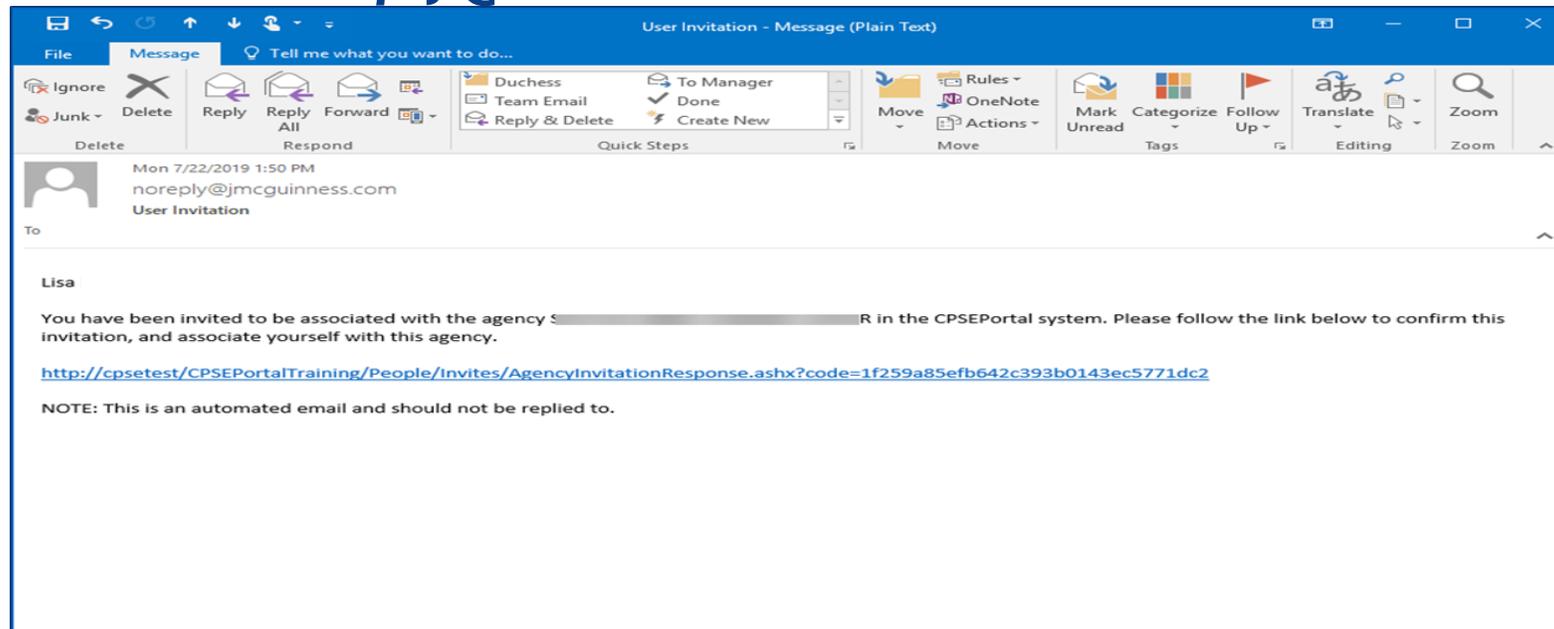
- \* To send an invitation to office staff who will be using the Portal, go to **People -> Invitations**.
- \* The next screen will then be to Invite Someone.
- \* Enter all information on this screen, and your User Type will be “Office”.
- \* If your Office user will be submitting vouchers to the county, then you will need to check the box “**Allow user to submit vouchers to county**”.



A screenshot of the 'Invite Someone' form. The form contains several input fields: 'First Name', 'Last Name', 'Email', 'Confirm Email', and 'Provider'. The 'User Type' dropdown menu is set to 'Office'. A red box highlights the checkbox labeled 'Allow user to submit vouchers to county', which is checked. A 'Send Invite' button is located at the bottom right of the form.

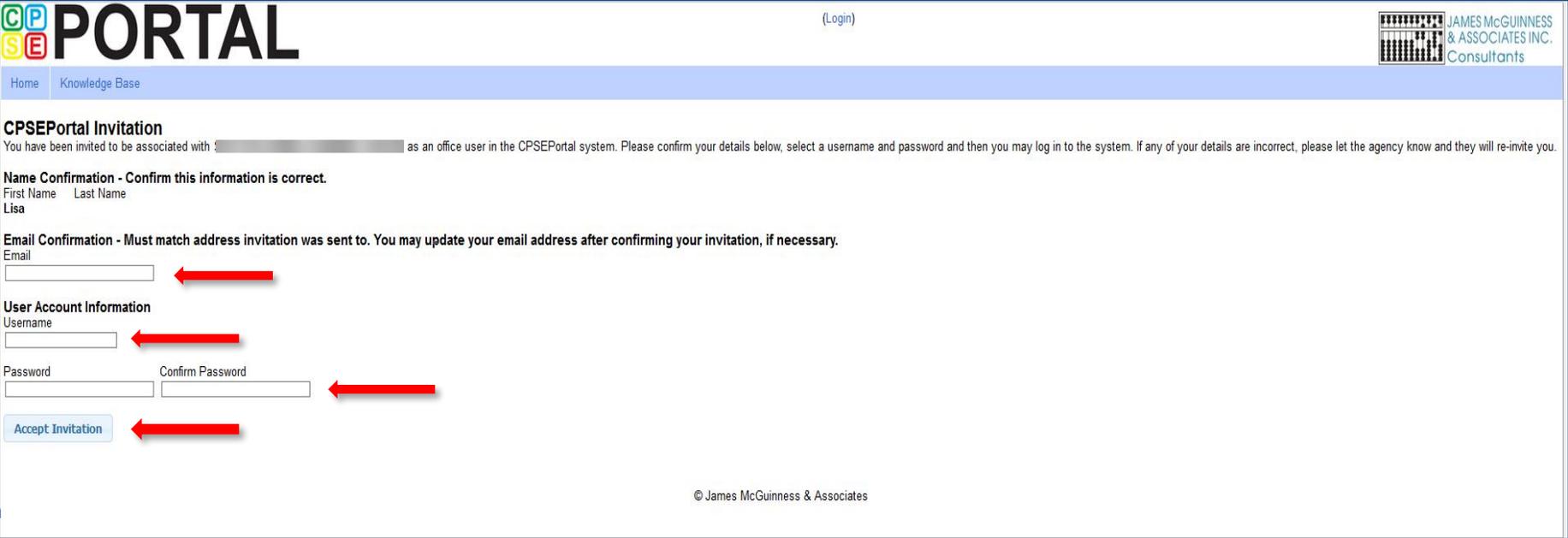
# Portal Invitation – Office User

After the agency sends out the invitation, the office user will receive the following email. The office user will click the link, to set up their account in the Portal. The email will come from ***noreply@CPSEPortal.com***.



# Portal Invitation – Office User

This screen comes up after the office user clicks the link. The office user will fill in the information below and then click the “**Accept Invitation**” button. At this point, the invitation process is complete.



The screenshot shows the CPSEPortal Invitation page. At the top left is the CPSE PORTAL logo. At the top right is the text "(Login)" and the logo for JAMES McGUINNESS & ASSOCIATES INC. Consultants. Below the logo is a navigation bar with "Home" and "Knowledge Base" links. The main heading is "CPSEPortal Invitation". Below this is a paragraph: "You have been invited to be associated with [redacted] as an office 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." There are four sections of form fields: "Name Confirmation - Confirm this information is correct." with "First Name" (Last Name) and "Lisa"; "Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary." with "Email"; "User Account Information" with "Username", "Password", and "Confirm Password"; and an "Accept Invitation" button. Red arrows point to the input fields for Email, Username, Password, Confirm Password, and the Accept Invitation button. At the bottom left is "Support@CPSEPortal.com" and at the bottom center is "© James McGuinness & Associates".

CPSE PORTAL (Login) JAMES McGUINNESS & ASSOCIATES INC. Consultants

Home Knowledge Base

### CPSEPortal Invitation

You have been invited to be associated with [redacted] as an office 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  
Lisa

**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

Accept Invitation

Support@CPSEPortal.com © James McGuinness & Associates



# Choosing Username, Password and PIN

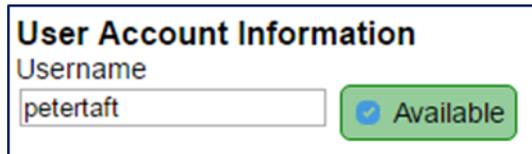
# Choosing Username and Password

- \* Choose a good username that can be remembered (name, email address, first initial & last name, etc.)
- \* If your desired username is in use by somebody else, the screen will show you:



**User Account Information**  
Username  
ptaft ⚠ Taken

- \* If your preferred username is unavailable, try again until you find an available one:

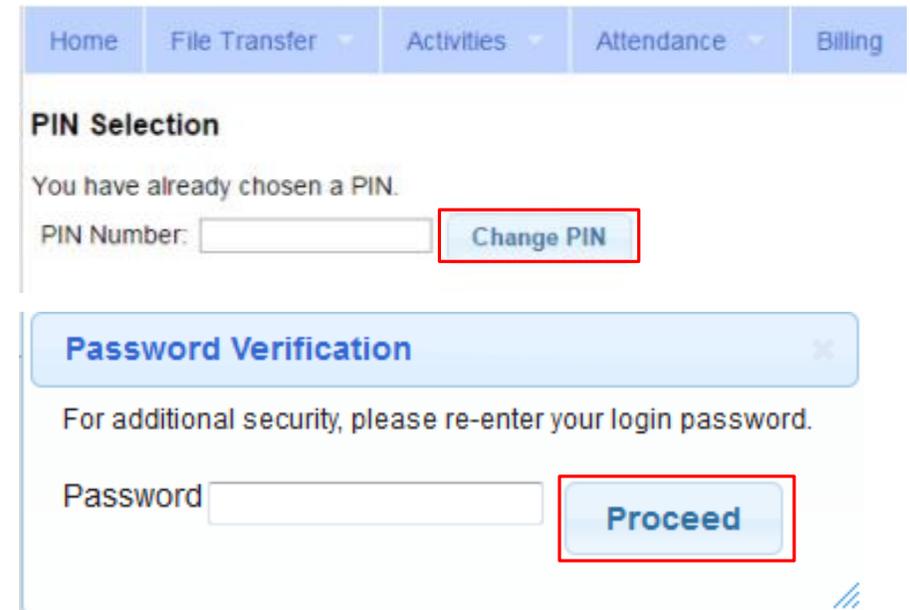


**User Account Information**  
Username  
petertaft ✔ Available

- \* Choose a password that is strong but that you can remember and reenter to confirm it.

# Choosing Your PIN

- \* Choosing PIN: **My Account -> My Pin**
- \* Enter your PIN number and click the button (“Choose PIN” for first time PIN setup, “Change PIN” for changing current PIN)
- \* Enter your **login password (NOT your pin)** to confirm your PIN change and click “Proceed”
  - \* <http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>



The screenshot shows a web interface with a navigation bar at the top containing links for Home, File Transfer, Activities, Attendance, and Billing. Below the navigation bar is a section titled "PIN Selection" with the text "You have already chosen a PIN." and a "PIN Number:" label next to an input field. A red box highlights the "Change PIN" button. Below this is a "Password Verification" section with the text "For additional security, please re-enter your login password." and a "Password" label next to an input field. A red box highlights the "Proceed" button. A close button (X) is visible in the top right corner of the Password Verification section.

# Resetting Forgotten Passwords

- \* If you have forgotten your password you do not need to contact CPSE Portal support. You can reset your own password by using the Forgot Your Password? link on the Log In screen.
- \* On the Password Recovery page, enter your user name and click Submit. You will be emailed a new password.
- \* <http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316>

CPSE PORTAL (Login)

Home Knowledge Base

**Log In**

User Name:  \*

Password:  \*

Remember me next time.

Log In

Forgot your password?

' field and a 'Submit' button."/>

**Password Recovery**

**Forgot Your Password?**

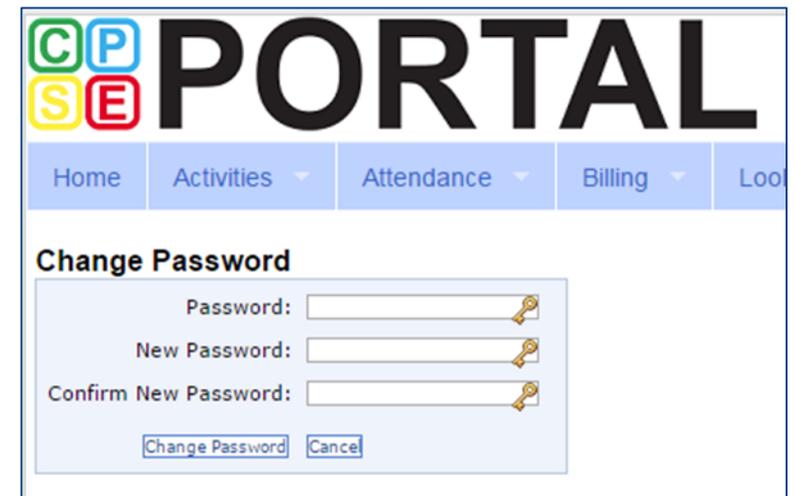
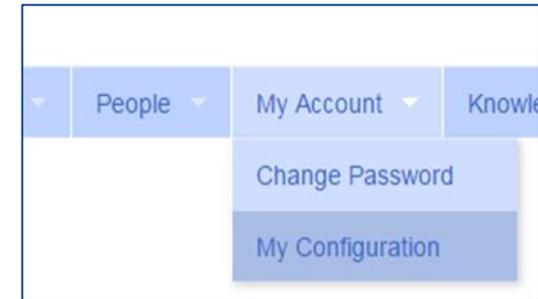
Enter your User Name to receive your password.

User Name:

Submit

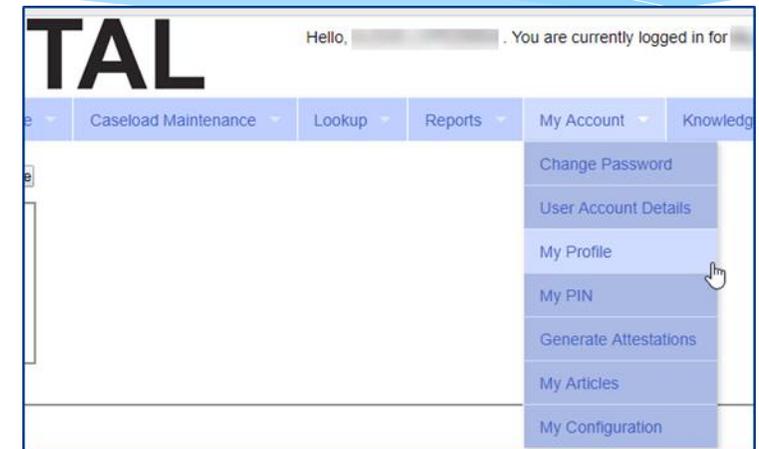
# Changing Your Password

- \* Go to **My Account -> Change Password**.
- \* Enter your current password in the password field.
- \* Enter your New Password.
- \* Re-enter your New Password to confirm it was entered correctly.
- \* <http://support.cpseportal.com/kb/a14/change-password.aspx?KBSearchID=16315>

A screenshot of the CPSE Portal's 'Change Password' page. The page features the CPSE Portal logo at the top left, followed by a navigation bar with links for Home, Activities, Attendance, Billing, and Login. Below the navigation bar, the 'Change Password' form is displayed. The form contains three input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a small key icon to its right, indicating that the text is hidden. At the bottom of the form, there are two buttons: 'Change Password' and 'Cancel'.

# Edit My User Information

- \* My Profile: **My Account** -> **My Profile** & click on “User Information” tab.
- \* This screen may be used to update user name and/or email address.
- \* Click “Update” and you will receive the following message: User Information Updated Successfully
- \* My Profile:
  - \* <http://support.cpseportal.com/kb/a59/edit-my-user-information.aspx?KBSearchID=16250>

A screenshot of the 'My Profile' user information form. The form has three tabs: 'Personal and Professional', 'User Information', and 'Favorites'. The 'User Information' tab is selected. The form contains four input fields: 'Username', 'Last Name', 'First Name', and 'Email'. Below the input fields is an 'Update' button.



# Agency Billing Provider Profile

# Agency Billing Provider Profile

- \* Agencies will need to create a Billing Provider Profile.
- \* Go to **My Account -> Billing Provider Profile**



# Agency Billing Provider Profile

All information entered on this screen will be the **agencies information only**. The NPI information should be for an organization.

**Billing Provider Profile**

Provider Info | User Information

**Billing Provider**  
Name:

**Billing Address**  
Address 1:   
Address 2:   
City:  State: NY Zip:   
Phone Number:

Information from NPPES NPI Registry  
[Click here for NPPES website](#)

NPI:  This NPI is for an   
Organization Name:   
Mailing Address 1:   
Mailing Address 2:   
City:  State: NY Zip:

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	252Y00000X	Agencies	Early Intervention Provider Agency			



# Portal User Access

# Portal Admin- User Access

- \* Go to **People -> Users**
- \* Within User Access:
  - \* See all users assigned to your agency
  - \* Assign role of Billing Staff
  - \* Assign role of Service Provider
  - \* Remove access to Portal or delete provider or roles



People ▾	My Account ▾
Credential Approval Listing	
Provider Specific Identifiers	
Service Provider Listing For School Year	
Service Provider Credential Listing	
Service Providers With Multiple Licenses	
Service Providers With License Issues	
Service Provider Credential Verification Listing	
Users	
People	
Invitations	



# Portal Admin- User Access

## Viewing/changing Existing Users

You will check off if a staff member is a Service Provider, Supervisor, a Basic User or a Billing Admin. Some staff may have more than 1 box checked.

**Users**

Provider

Username	First Name	Last Name	Email	Associated Person	Service Provider	Supervisor	QA Supervisor	Basic	Billing Admin		
ALEXA.FLANAGAN12			demo@cpseportal.com	FLANAGAN, ALEXA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	update cancel	delete
RIKKI.PUCKETT10516	Josephine	Acheta	demo@cpseportal.com	PUCKETT, RIKKI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
RINA.DOWNING10517	Cathy	Campbell	lmell@jmcguinness.com	DOWNING, RINA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
PENEL.BUCKLEY12095	Wendy	Hill	demo@cpseportal.com	BUCKLEY, PENELOPE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MITCH.WHEELER14250	Katherine	Agard	demo@cpseportal.com	WHEELER, MITCHELL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
BARBR.MCKEE798	RUTH	AGNE	demo@cpseportal.com	MCKEE, BARBRA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
ABIGA.COTTON10257	Aimee	Alvarez	demo@cpseportal.com	COTTON, ABIGAIL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MINA.GILLESPIE3614	Abigail	Andrews	demo@cpseportal.com	GILLESPIE, MINA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete

- Admin-(management/administrators) can submit vouchers on behalf of the agency
- Basic- (clerical/billing staff)
- Supervisor (UDO/USO)
- QA Supervisor (quality assurance supervisor)



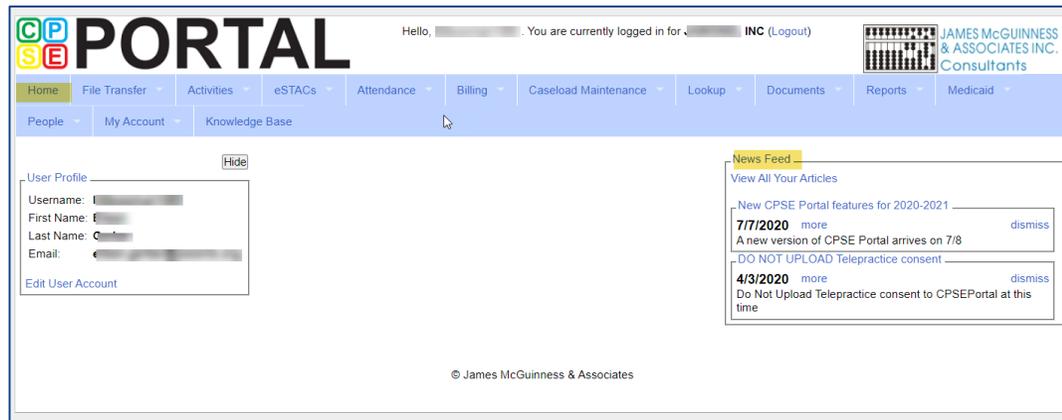
# News Feed

# News Feed / My Articles

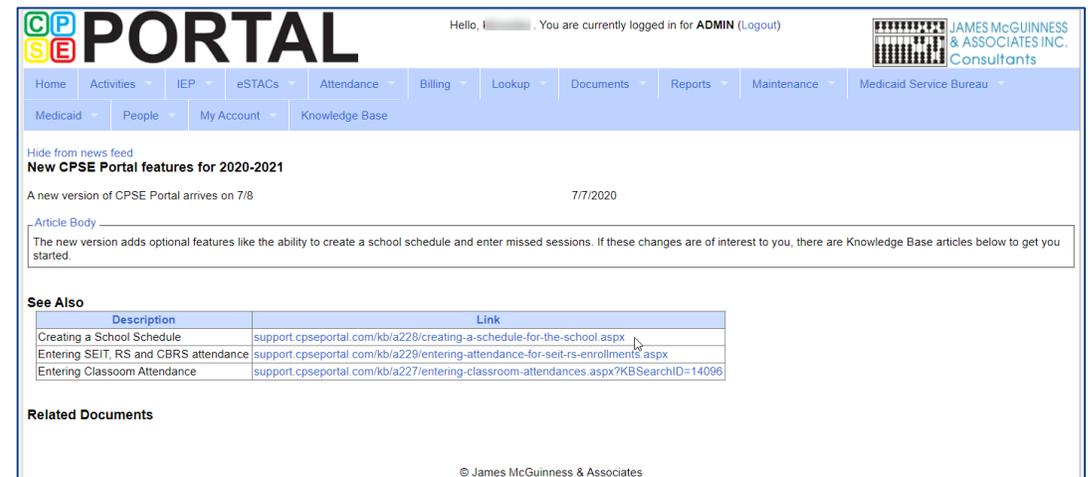
News Feed contains current articles and updates to the Portal. News Feed can be found in 2 ways.

Your current News Feed will be located on your Home Page

For all News Feed articles:  
**My Account -> My Articles -> View**



The screenshot shows the CPSE Portal Home Page. The top navigation bar includes links for Home, File Transfer, Activities, eSTACs, Attendance, Billing, Caseload Maintenance, Lookup, Documents, Reports, and Medicaid. Below this, there are sub-navigation links for People, My Account, and Knowledge Base. On the left, there is a User Profile section with fields for Username, First Name, Last Name, and Email, along with an Edit User Account link. On the right, the News Feed section is highlighted, showing a list of articles with dates and links to view more.



The screenshot shows the CPSE Portal My Account -> My Articles -> View page. The top navigation bar includes links for Home, Activities, IEP, eSTACs, Attendance, Billing, Lookup, Documents, Reports, Maintenance, and Medicaid Service Bureau. Below this, there are sub-navigation links for Medicaid, People, My Account, and Knowledge Base. The main content area displays a list of articles with dates and links to view more. A table titled 'See Also' provides additional links to related documents.

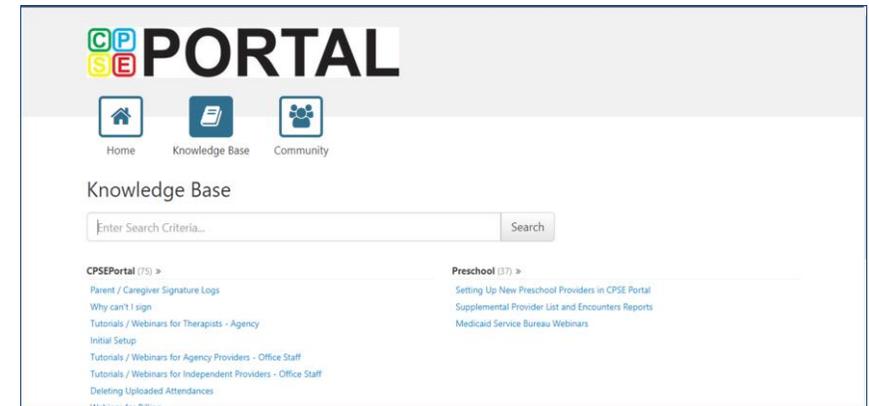
Description	Link
Creating a School Schedule	<a href="support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx">support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx</a>
Entering SEIT, RS and CBRS attendance	<a href="support.cpseportal.com/kb/a229/entering-attendance-for-seit-rs-enrollments.aspx">support.cpseportal.com/kb/a229/entering-attendance-for-seit-rs-enrollments.aspx</a>
Entering Classroom Attendance	<a href="support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=14096">support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=14096</a>



# Closing

# Portal Training – Knowledge Base

- \* The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Portal support.
- \* You can simply click the Knowledge Base tab in the Portal or you can go to:
- \* <http://support.cpseportal.com/kb>



# Upcoming Webinars

## CPSE Portal Credential Verification (**ALL Agency Staff, Agency Service Providers & Independent Providers**):

- \* Tuesday, May 9, 2023 @ 10:00AM - <https://attendee.gotowebinar.com/register/6606552384690071902>
- \* Thursday, May 11, 2023 @ 3:00PM - <https://attendee.gotowebinar.com/register/5003755801974078047>

### Topics Covered During This Webinar:

- What is credential verification?
- Why do we need credential verification?
- Whose credentials need to be verified?
- Who should complete the verification process?
- Verifying your License.
- Name changes for the NYS Office of Professions.
- Verifying your NPI #.
- Name Changes for NPPES.

# Upcoming Webinars

## CPSE Portal Agency Case Management (**Agency Staff**):

- \* Tuesday, May 16, 2023 @ 10:00AM - <https://attendee.gotowebinar.com/register/4232679292531497304>
- \* Thursday, May 18, 2023 @ 2:00PM - <https://attendee.gotowebinar.com/register/6517112611329166426>

## Topics Covered During This Webinar:

- Child Lookup
- Unmatched Children and Enrollments
- Assigning Children to Therapist/SEIT
- View Unmatched Enrollments
- Matching Children
- Matching Enrollments
- Moving Attendances Between Enrollments
- Enrollment Lookup Report
- Enrollment Assignments Report

# Upcoming Webinars

## CPSE Portal Center Based (CB) Agency Case Management (**Agency Staff**):

- \* Wednesday, May 17, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/936257670592953948>
- \* Friday, May 19, 2023 @ 2:00PM -  
<https://attendee.gotowebinar.com/register/112194596295817823>

## Topics Covered During This Webinar:

- Classroom Management
- Creating a Schedule for the School
- Unmatched Children and Enrollments
- Entering and Signing Classroom Attendance
- CB Enrollments Missing Attendance

# Upcoming Webinars

## CPSE Portal Case Management for **Independent Providers**:

- \* Wednesday, May 24, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/2211758229022601046>
- \* Thursday, June 1, 2023 @ 4:00PM -  
<https://attendee.gotowebinar.com/register/5421969343291392093>

## Topics Covered During This Webinar:

- Child Lookup
- Unmatched Children and Enrollments
- Enrollment Lookup Report
- My Caseload
- Digital Orders
- Moving Attendances Between Enrollments

# Upcoming Webinars

## CPSE Portal Case Management for **Agency Service Providers**:

\* Friday, May 26, 2023 @ 3:00PM -

<https://attendee.gotowebinar.com/register/4803077337760550746>

\* Wednesday, May 31, 2023 @ 10:00AM -

<https://attendee.gotowebinar.com/register/2931509535681214299>

## Topics Covered During This Webinar:

- What are Unmatched Enrollments
- My Caseload
- Digital Orders
- Reports

# Upcoming Webinars

## CPSE Portal Session Notes (**ALL Agency, Agency Service Providers & Independent Providers**):

\* Wednesday, June 7, 2023 @ 4:00PM -

<https://attendee.gotowebinar.com/register/2558356179935036505>

\* Friday, June 9, 2023 @ 10:00AM – <https://attendee.gotowebinar.com/register/1511566134710937431>

## Topics Covered During This Webinar:

- Recap Entering/Signing Classroom Attendance
- Attendance Entry Record
- Creating Defaults for Session Notes
- Signing Attendance/Review & Sign
- Co-Signing Session Notes/Attendance
- Un-signing Attendance/Making Corrections After Signing
- Printing Logs
- Reports

# Upcoming Webinars

## CPSE Digital Speech Recommendations (**Agencies and SLP's only**):

\* Tuesday, June 6, 2023 @ 3:00PM -

<https://attendee.gotowebinar.com/register/1959650108113136987>

\* Thursday, June 8, 2023 @ 10:00AM -

<https://attendee.gotowebinar.com/register/8298551246032462681>

## Topics Covered During This Webinar:

- How to Create the Digital Recommendation / Order
- When to Create the Digital Recommendation / Order
- One-time Set-up for the SLP and Billing Agency
- Creating Unmatched Records

# Upcoming Webinars

## CPSE Portal Agency Billing Using the CPSE Portal (**Agency Billing Admins only**):

- \* Tuesday, July 25, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/9055301119231125080>
- \* Thursday, July 27, 2023 @ 2:00PM -  
<https://attendee.gotowebinar.com/register/5770436463971289695>
- \* Wednesday, September 27, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/4933499208024528219>

# Upcoming Webinars

## **CPSE Portal Agency Billing Using the CPSE Portal (con't):**

### **Topics Covered During This Webinar:**

- Review Portal Invitations
- Review Portal Admin – User Access
- Review Credential Verification
- Creating & Submitting Vouchers
- How to Correct Attendance & Rebill
- Items Not Ready To Bill Report
- Voucher Listing Report

# Upcoming Webinars

## CPSE Portal Billing for **Independent Providers**:

- \* Tuesday, August 1, 2023 @ 4:00PM -  
<https://attendee.gotowebinar.com/register/2592921526977985629>
- \* Thursday, August 3, 2023 @ 10:00AM -  
<https://attendee.gotowebinar.com/register/4132709496352725084>
- \* Thursday, September 28, 2023 @ 4:00PM -  
<https://attendee.gotowebinar.com/register/8295469315205738336>

## Topics Covered During This Webinar:

- Creating & Submitting Vouchers
- How to Correct Attendance & Rebill
- Items Not Ready To Bill Report
- Voucher Listing Report

# Upcoming Webinars

## CPSE Portal Billing Using an Outside System (**Agency Billing Admin's only not using the Portal**):

- \* Wednesday, July 26, 2023 @ 10:00AM - <https://attendee.gotowebinar.com/register/2511961187289860190>
- \* Friday, July 28, 2023 @ 2:00PM - <https://attendee.gotowebinar.com/register/6770055261340792925>
- \* Tuesday, September 26, 2023 @ 10:00AM - <https://attendee.gotowebinar.com/register/2044012337043337049>

## Topics Covered During This Webinar:

- Review of Import Person with License Template
- Review Credential Verification
- Schema Attendance File
- Validate Attendance File
- Upload Attendance File
- Creating Vouchers
- Submitting Vouchers
- Attendance Denied – How to Rebill
- Voucher Listing Report

# Knowledge Base Links

- \* Template to Import Multiple Therapists & Portal Profession Codes:  
<http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175>
- \* Forgot Your Password:  
<http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316>
- \* Choosing A PIN:  
<http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>
- \* Edit My User Information:  
<http://support.cpseportal.com/kb/a59/edit-my-user-information.aspx?KBSearchID=16250>

# Closing remarks

- \* The Portal is a helpful tool for both the County and their preschool providers
- \* CPSE Portal Address (you may want to bookmark):  
<https://www.cpseportal.com>
- \* In addition to the Portal Knowledge base, our Help Desk is available through email at [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
  - \* *When emailing the Help Desk, **do not** use the child's name as this is a HIPPA violation!!*
  - \* *Use the child's ESID # or their child #.*