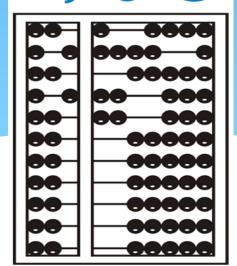
Cayuga County eSTACs Getting Started -Entering Children and STAC-5



#### Cayuga County Timeline

#### \* March 28, 2024:

\* McGuinness will migrate all of the children that are in the Cayuga County Preschool system over into eSTACs.

#### \* April 1, 2024:

- \* Cayuga County school districts can begin entering 24/25 children and STACs into eSTACs.
- \* All prior year STAC's (23/24, 22/23, 21/22 etc.), send paper STAC to the county to enter or amend in their Preschool system. Prior years will not be turned on in eSTACs and you will not be able to enter any STACs.

#### What is eSTACs

- \* eSTACs is part of our CPSE Portal website (<a href="https://www.cpseportal.com">https://www.cpseportal.com</a>).
- \* It is a series of screens to facilitate the communication of STAC related information from the school district to the County.
- \* The goal is to eliminate sending paper between from the district to the County (or at least get very close).

#### Types of Information

- \* The following information can be sent to the County via eSTACs
  - Evaluation information (eliminating need for STAC-5)
  - Service information (eliminating need for STAC-1)
  - Supporting documentation including
    - \* Medicaid Parental Consents
    - \* Transportation forms
    - \* IEP
    - \* Aide / Nurse forms
    - \* Birth certificate, passport, adoption papers, legal name change document
    - \* More....

# District Designation of Digital Signatories for eSTACs Form

- \* Each school district completes a District Designation of Digital Signatories for eSTACs form.
  - \* This form will designate the CPSE Chair and all staff who will have access to eSTACs, and will be marked as to **who can** sign & submit STAC-1 & STAC-5's for the school district.
  - \* McGuinness will enter all staff listed on the form and invite them to the Portal.
  - \* Once the school district staff accepts the invitation, and sets up their Portal account, then McGuinness will give the staff the necessary permissions to each staff to sign according to what is marked on the form.
  - \* If you want staff to do entry work, but **NOT** sign & submit STAC's, then do not check off any of the boxes.
- \* If the school district has a change in staff or needs to add staff signing privileges, a new form should be completed, and sent to McGuinness.

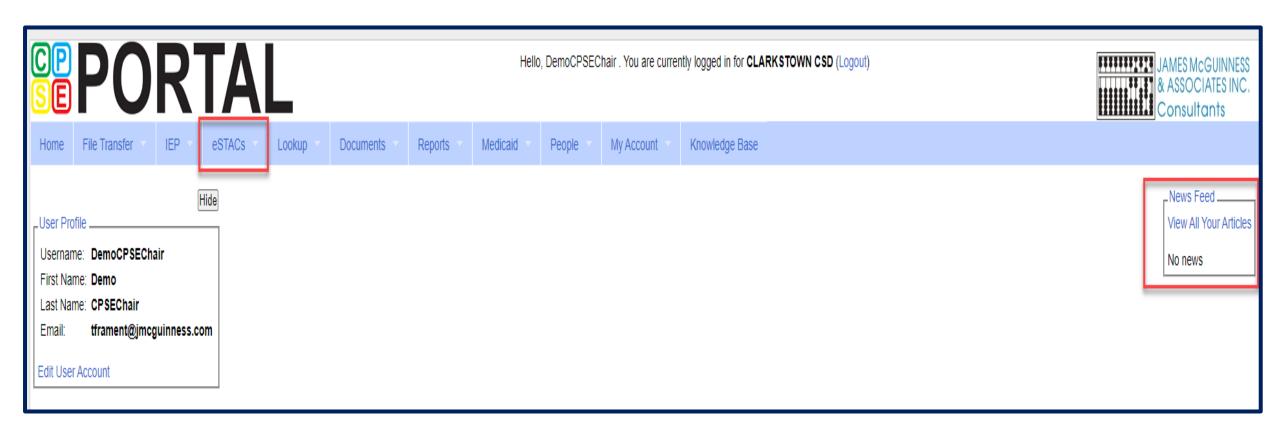
# District Designation of Digital Signatories for eSTACs

District Designation of Digital Signatories for eSTACs					
District					
CPSE Chairperson					
I authorize of the following individuals to use a digital signature to submit electronic STAC records the eSTACs system on behalf of our district.					
Name	eMail	Position / Title	STAC-5	STAC-1	
		CPSE Chairperson			
received the submitted multidiscip Commissioner of Education and we We certify that for any STAC-1 the student with a disability is being p Committee on Preschool Education	at the above individuals electronically signal plinary evaluation in accordance with Sective maintain proper documentation to support the above individuals electronically signal the educational services submitted on and that the child is eligible for such placements.	tion 4410 of the Education I port this. In and submit through the est ed and that such services ha acement in accordance with	Law and the Reg STACs system, t ave been recom h Section 4410 o	julations of the the preschool mended by the	
Name	Title	Date		ne completed form to 138 attention eSTACs.	



# Home Page of Portal

- \* You will be using the eSTACs tab on your home page.
- \* You will also see News Feed articles on the right side of your home page.



### Getting Started

- \* Each district has a login to the CPSE Portal.
- \* That single login can "invite" additional users from their district.
- \* Every individual that logs in for a district should have their own username & password.
- \* When a person receives an invite, they can then click a link to accept the invitation and create a username and password.

# Inviting New Users

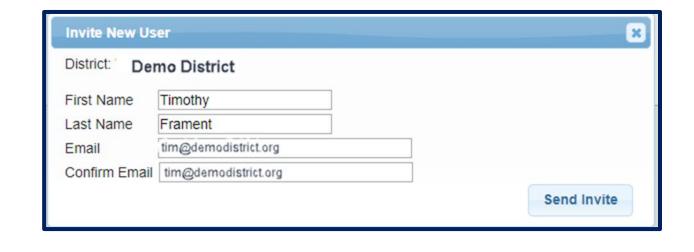


- \* Go to People -> District Users
- \* Click "Invite New User".



### Inviting New Users

- \* Enter First Name, Last Name & Email address of new user, and click "Send Invite".
- \* CPSE Portal will send an email inviting the new user to join the Portal.



#### Accepting the Invitation

- \* The new user will receive the below email containing a link to join the Portal.
  - \* The link will come from **noreply@CPSEPortal.com**.

From: noreply@CPSEPortal.com

Sent: Thursday, January 31, 2019 9:56 PM

Subject: User Invitation

Timothy Frament,

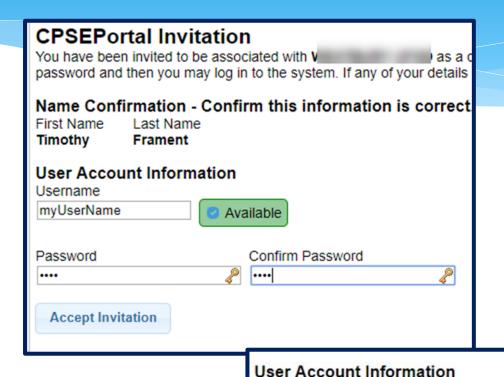
You have been invited to be associated with the district DEMO DISTRICT in the <u>CPSEPortal</u> system. Please follow the link below to confirm this invitation, and associate yourself with this district.

http://localhost/CPSEPortal/People/Invites/DistrictInvitationResponse.ashx?code=db7d8f7ab79a4ddebd037d9c855e36fc

NOTE: This is an automated email and should not be replied to.

# Choosing Username and Password

- \* The confirmation page allows the user to choose a username and password, and "Accept Invitation".
- \* When the individual enters their choice for a username the screen will display whether that name is available or not.



Username

Password

**Accept Invitation** 

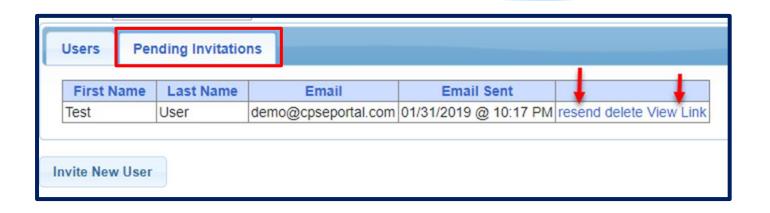
demodistrict

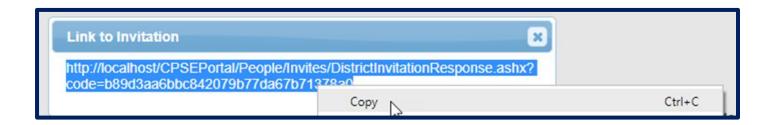
A Taken

Confirm Password

#### Invitation Issues – User did not receive an email

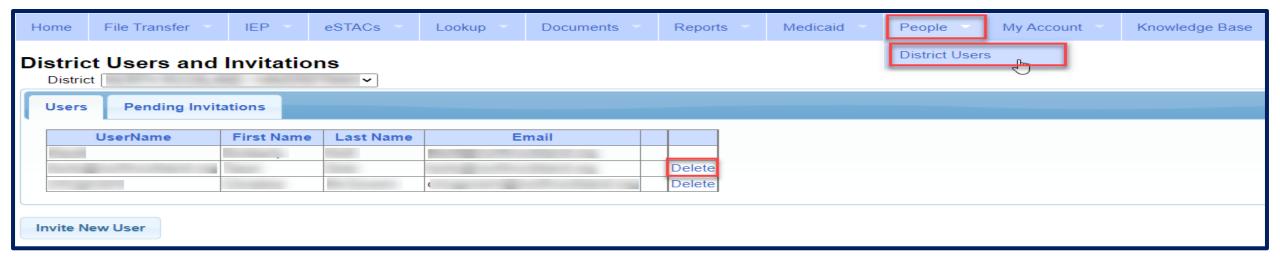
- \* Have user check their junk / spam folder.
- \* Use the Pending Invitations tab under **People** -> **District Users** to either:
  - \* Resend link
  - Copy the link and send with your email





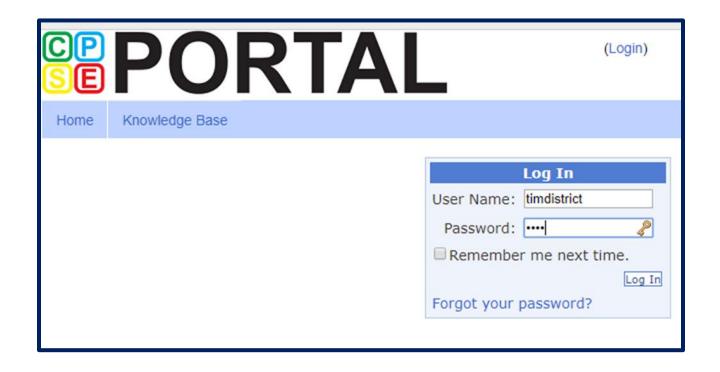
# Deleting District Users

- \* If a staff member leaves their position the CPSE Chair listed in the Portal can delete them from the Portal.
- \* Go to People -> District Users
- \* Select the "Delete" option next to the staff members name.



# Logging In

- \* Use your browser to navigate to <a href="https://www.cpseportal.com">https://www.cpseportal.com</a>
- \* Enter your User Name and password.



#### Digital Signature – User Profile

- \* The user's account should have that individuals first and last name associated with the account.
- \* You can easily see whether your account has the first and last name entered by looking user profile panel on the dashboard when you first log in.
- \* To add or edit First & Last name, click **My Account** -> **User Account Details**.





# Digital Signature

- \* Go to My Account -> User Account Details
- \* Use the User Account Details page to enter / edit your Last name and First name for your account.
- \* Click "Update" to save the changes





# Digital Signature – Signature & Title

- \* Go to My Account -> My Profile
- On the Personal and Professional tab, ensure that your first and last name are correct.
- \* Enter your Signature & Title by typing out your "signature" exactly as it would be if you signed your name with a pen. Include any punctuation, titles, etc. that you include when you sign your name for CPSE related documents.
- \* Click "Update" to save your changes.





# Digital Signature – Creating Your Pin

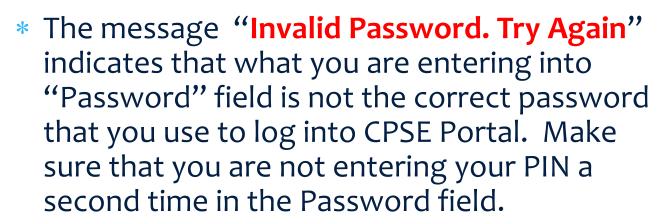
- \* Go to My Account -> My PIN
- \* To create your PIN:
  - \* 1 Choose a PIN and type it in the PIN Number field.
  - \* 2 Enter your username that you log in with (should be prefilled).
  - 3 Enter your password that you use to login to CPSE Portal.
  - \* 4 Click "Save PIN".

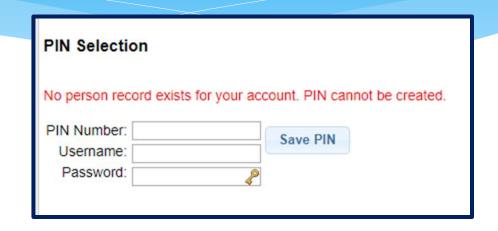




# Digital Signature – Creating PIN Problems

\* The message "No person record exists for your account. PIN cannot be created." indicates that you did not perform Step #1 – Entering your first and last name for the user account.





PIN Selection	
You have already chosen a PIN. Invalid Password. Try again.	
PIN Number: Username: RyDellUser Password:	Change PIN

### Forgotten Passwords

- \* User can click "Forgot your password?" on login screen.
- \* Enter your username and click "Submit".
- \* An email with a new password will be sent to your email address.





#### Forgotten Usernames

\* Any district user (or County user) can use the district users screen to view all the users and see what their username is.

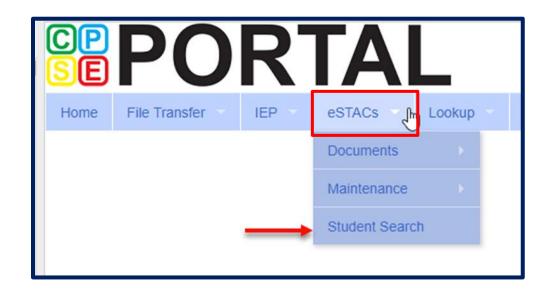
\* Go to People -> District Users



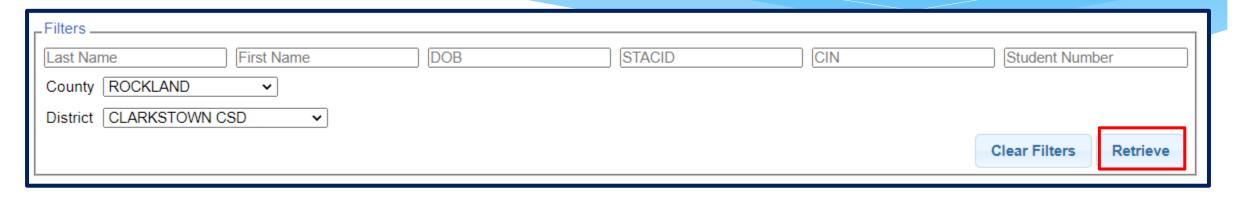
# eSTACs Entering Children

#### eSTACs Student Search

\* Go to eSTACs -> Student Search

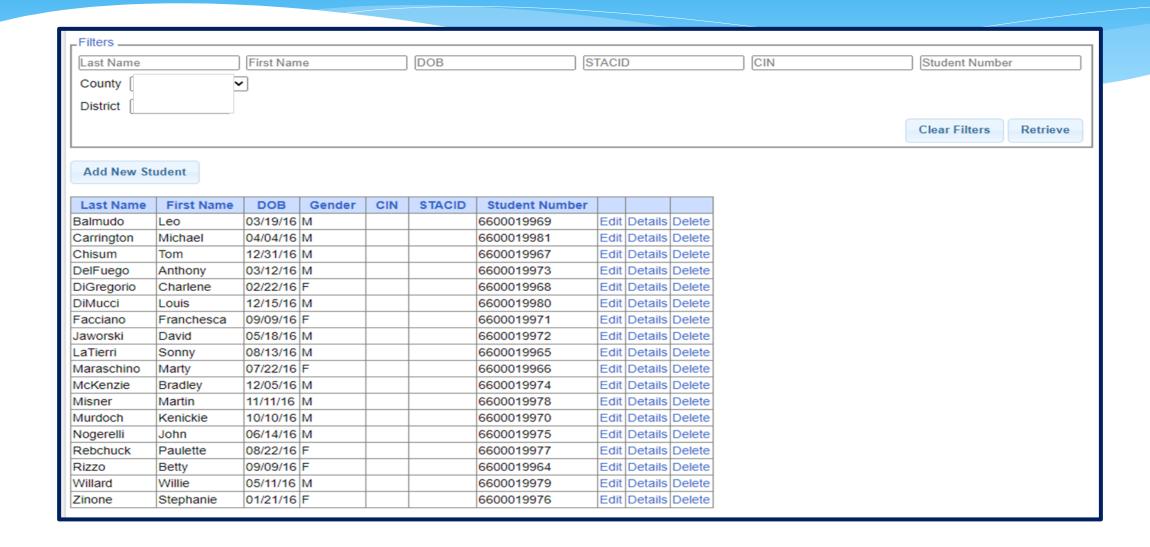


#### Student Search



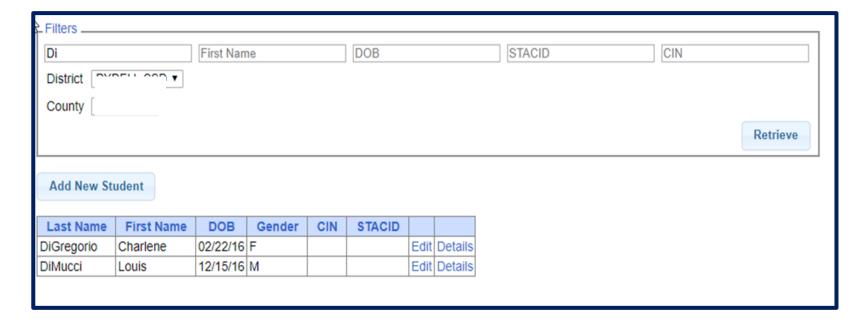
- \* ALWAYS search to make sure the child isn't already in the system.
- \* The fields above are used as filters to find a specific child. You can search based on any combination of fields.
- \* Searching with no filters specified will return all children. Click "Retrieve".

#### Student Search – no Filters



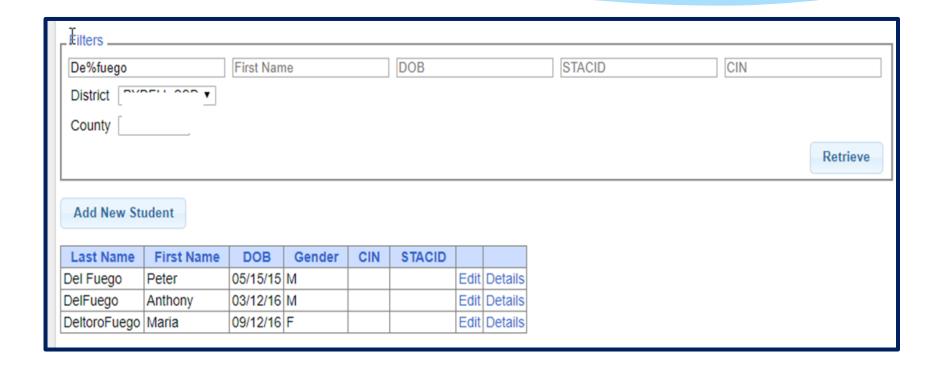
#### Student Search – Partial Name

\* For the first and last name you can enter the first few letters and search to find all students that name start with those letters.



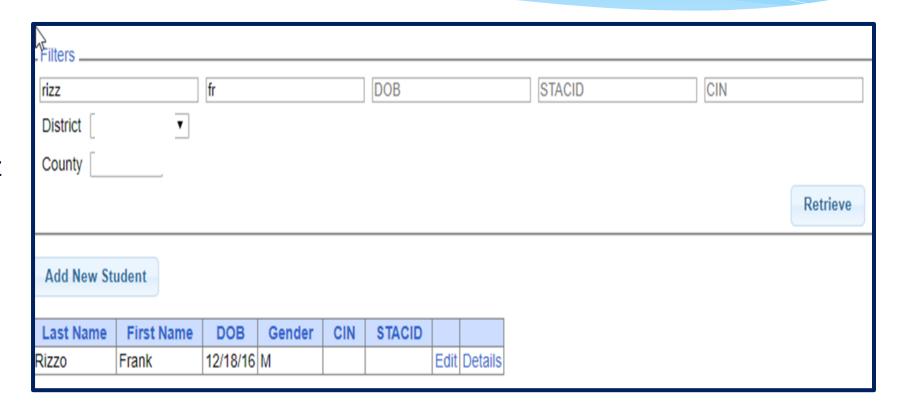
#### Student Search - Wildcard

\* Use the percent sign (%) as a wildcard.



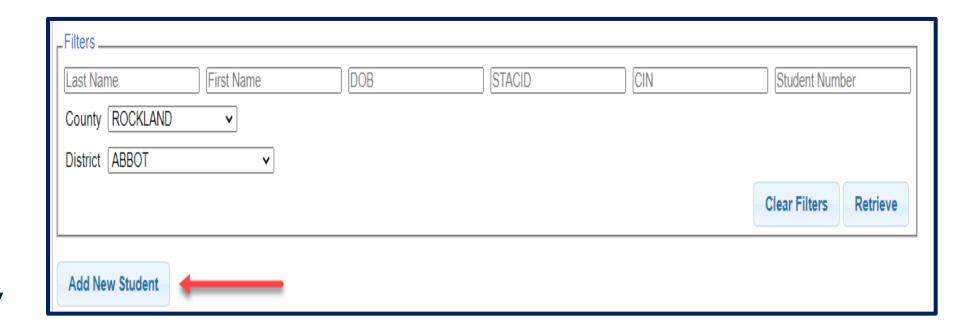
# Student Search – Multiple Fields

\* You can search for both first and last name as well as partial first and last names.



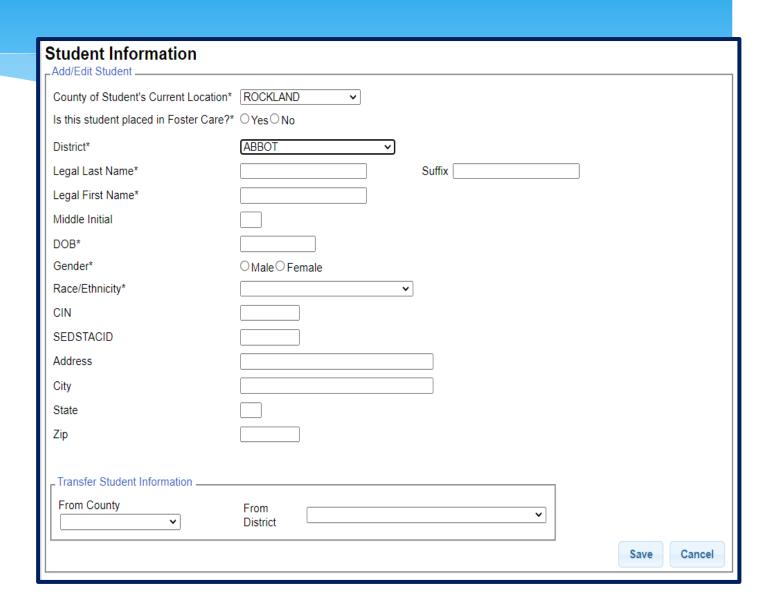
# Adding a Student

- \* Go to the Student Search screen.
- \* Verify student is not already in system.
- \* Click on "Add New Student" button.



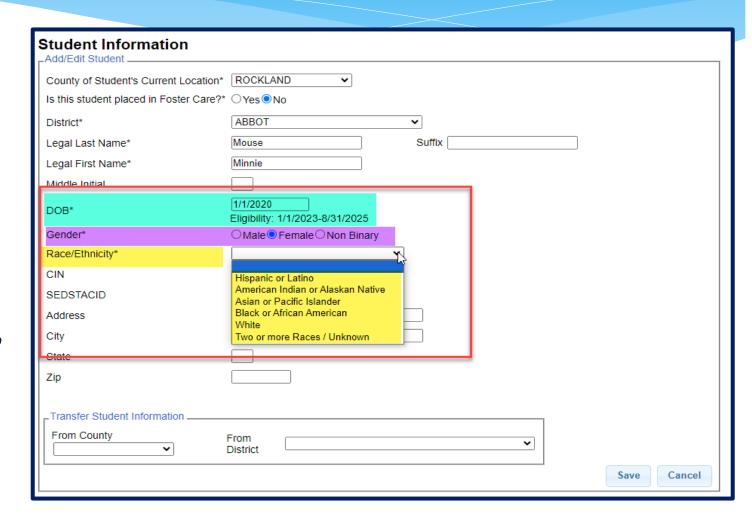
#### Student Information

- Field with an asterisk (\*) next to their label are required in order to save.
- \* When creating a child:
  - \* If the child is a Jr/II/III, please enter this information in the Suffix box. Do not include this with the child's last name.
- \* Cayuga County requires the address of the child.
- Other fields should be entered if the information is known.



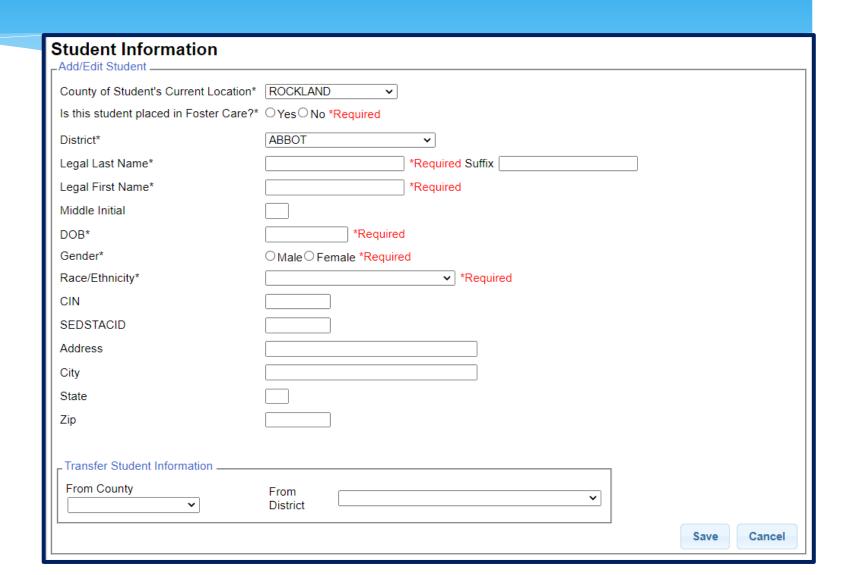
#### Student Information

- \* When you enter the DOB, the dates of eligibility will populate.
- \* Gender now contains "Non Binary" if needed.
- \* Race/Ethnicity field contains "Two or more Races / Unknown" if you do not know the race.



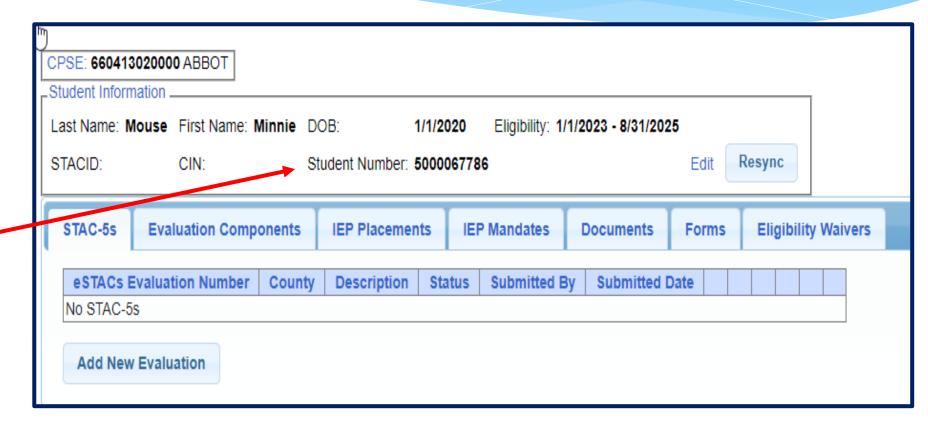
# Saving Incomplete Entry

- \* Clicking "Save" without all mandatory fields entered will result in labels indicating the missing data.
- \* If you do not enter the child's address, you will not be able to submit the STAC-5 or STAC-1.



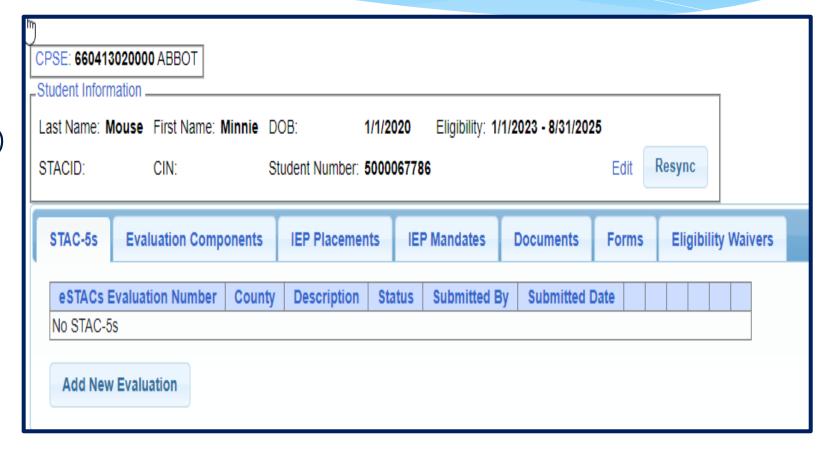
#### Student Details

- \* Upon saving a new student, the system will take you to the student details page.
- \* Once student is \_\_\_\_ created, each child is given a Student Number.



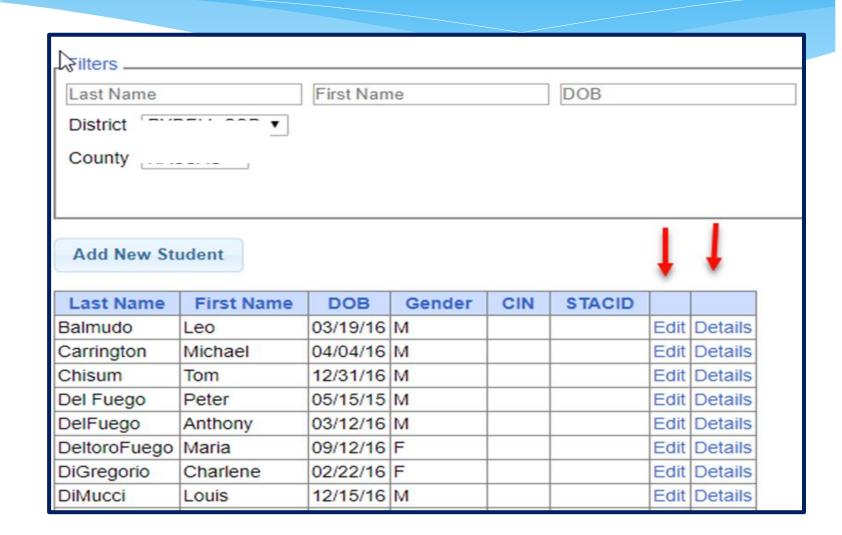
#### Student Details

- Top section shows child demographic information.
- \* Lower section has tabs for:
  - STAC-5s (one row per STAC-5)
  - Evaluation Components (one row per evaluation component)
  - \* IEP Placements (one row per STAC-1)
  - IEP Mandates (one row per mandated service on IEP)
  - Documents (uploaded documents for student)
  - \* Forms
  - Eligibility Waivers



# Editing Existing Student

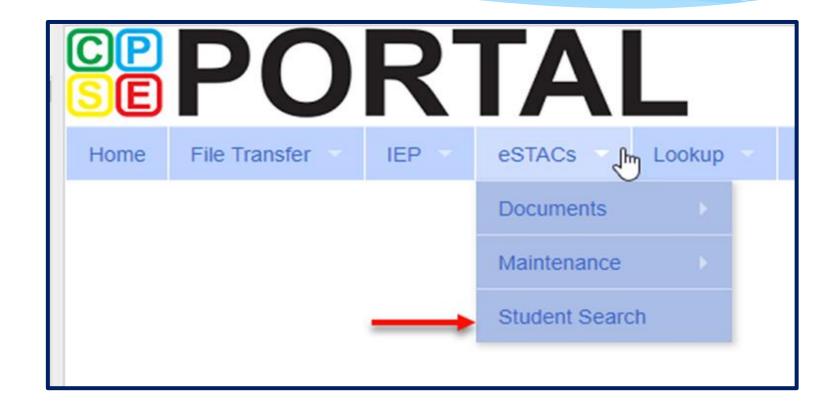
- \* Search for student
- \* Click "Edit" to edit student demographics (name, address, etc.)
- \* Click "Details" to get to student details page with evaluations, services, documents, etc.



# **eSTACs Entering STAC-5**

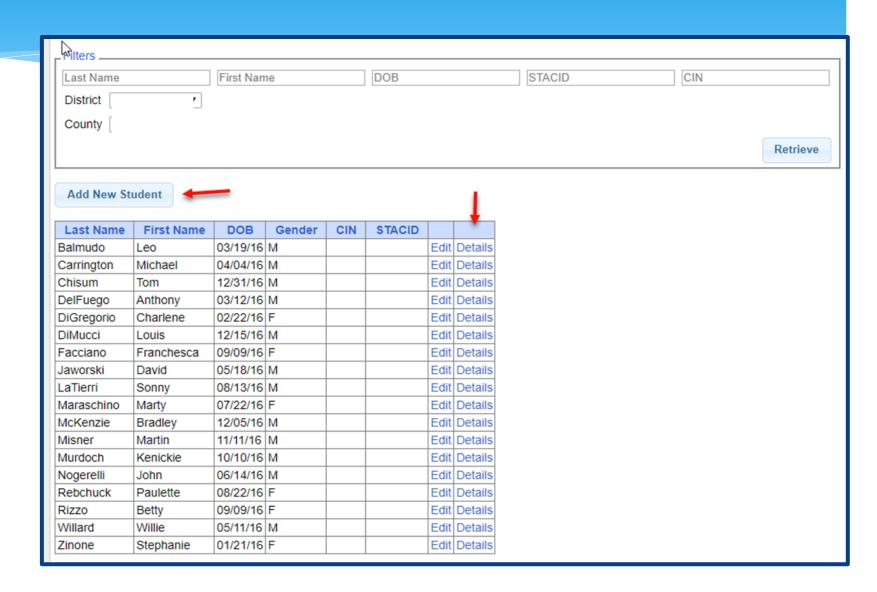
#### eSTACs Student Search

\* Go to eSTACs -> Student Search



#### Student Search for Student Details

- \* Always search for the student first.
- \* If student is already in system, click the "Details" link for that student.
- \* If student does not exist, click "Add New Student".



#### Adding a New Evaluation

- \* Select the "STAC-5s" tab.
- \* Click the "Add New Evaluation" button.



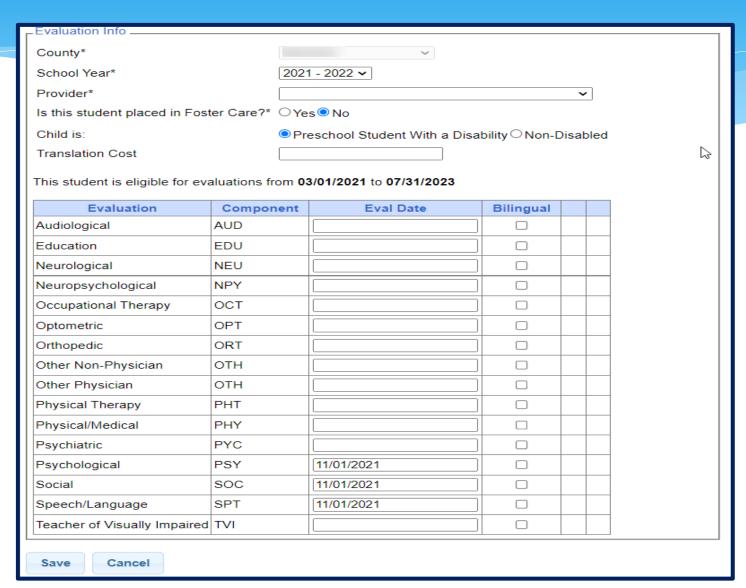
## eSTACs vs Paper STAC-5

.Evaluation Info														
School Year*  Provider*  Is this student placed in Foster Care?*  County at time of placement*		WES	STCHESTER V 2											
		2020 - 2021 ▼ 1												
								OPreschool Student With a Disability ONon-Disabled						
													This student is eligible for eva	
								Evaluation Social	Compon	ent	Eval Date	Bilingual		
		Psychological	PSY											
		Speech/Language	SPT											
Physical Therapy														
	РНТ ОСТ													
Occupational Therapy														
Physical/Medical	PHY					6-								
Education	EDU					Ě								
Audiological	AUD													
Other Physician	ОТН													
Other Non-Physician	ОТН													
Psychiatric	PYC													
Neurological	NEU													
Optometric	OPT													
Orthopedic	ORT													
Counseling	CSL													
Functional Vision	FUV													
Teacher of Visually Impaired	TVI													
Neuropsychological	NPY													

ý	STAC-5	THE STATE I	sity of the State of New York EDUCATION DEPARTMENT C and Medicaid Unit			Rev. 8/2017	
	Request for Com	missioner's Approva	I of Reimbursement fo	r the	Cost of Ev	aluations	
	STAC-ID		List the date each evaluation component was For bilingual evaluations indicate on line provi		(use four digits to indic	cate month and year).	
	STUDENT IN	FORMATION	EVALUATION COMPONENT		MONTH / YEAR	CHECK IF BILINGUAL	
	Last Name First	Name Middle Initial	Audiological	AUD			
			Counseling	CSL			
		fication Number Gender	Education	EDU			
		☐ Female ☐ Male	Functional Vision	FUV		6	
	DISABILITY	RACIAL ETHNIC CATEGORY OF	Music	MUS		•	
		STUDENT	Neurological  Neuropsychological	NEU			
	The child named above is:	☐ Hispanic or Latino	Occupational Therapy	OCT			
	PD - Preschool Student With a Disability	Not of Hispanic Origin:	Optometric (visual)	OPT			
	□ ND - Non-Disabled	<ul> <li>American Indian or Alaskan Native</li> </ul>	Orthopedic	ORT			
	NO - Non-Disabled	<ul> <li>□ Asian or Pacific Islander</li> <li>□ Black or African American</li> </ul>	Physical/Medical	PHY			
	1	<ul> <li>□ Native Hawaiian or other Pacific Islander</li> </ul>	Physical Therapy	PHT			
	•	☐ White ☐ Two or more Races	Psychiatric	PYC			
		(see explanation on second page)	Psychological	PSY			
	Colonia District vitt. CDCE Domestik litter	0005 00404 050 (0500) 0-4-	Social	SOC			
	School District with CPSE Responsibility	CPSE District SED (BEDS) Code	Speech / Language	SPT			
			Teacher of Visually Impaired	TVI			
County of Child's Current Location (where child resides)		Other:			/ <u>F</u>		
County at time of Placement in Foster Care			Cost of translation/transmittal of evaluation documentation or summary report for monolingual evaluations only.				
			PERSON COMPLETING THIS FORM				
3		Name	Ti	tle			
	Approved Evaluator		Phone	Er	mail		
m	ERTIFICATION OF EVALUATION: I certify ultidisciplinary evaluation as indicated above ducation Law and the Regulations of the Comp	and in accordance with Section 4410 of the		quest for C		has received on oval of Reimbursement for the 4410 of the Education Law.	
Si	gnature CPSE Chairperson			Date//	_		

#### Complete Fields Related to Evaluation

- Enter information regarding evaluation.
- Enter the exact evaluation dates.
- \* All fields labeled with an asterisk (\*) must be filled in to save.



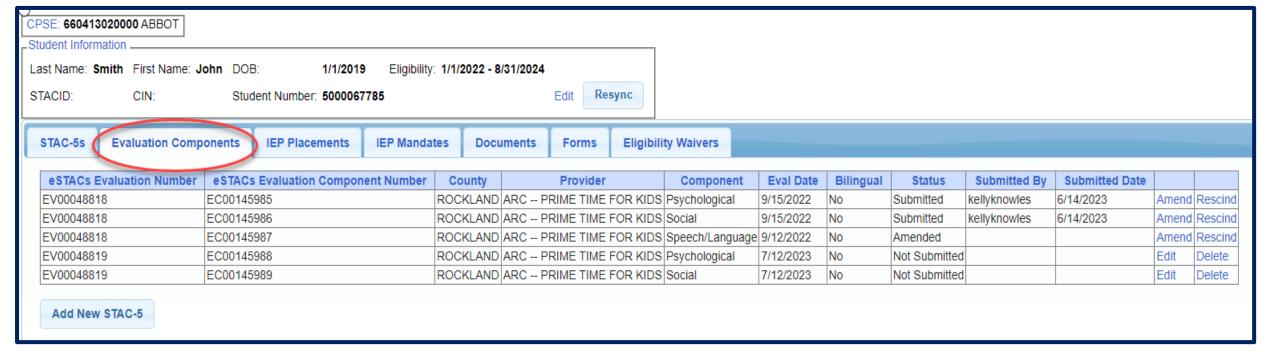
#### Evaluations – STAC-5 Tab

- \* There are two tabs for Evaluations:
- \* STAC-5s Tab shows one line per STAC-5 group of components.



#### **Evaluation Components Tab**

- \* The second tab for Evaluations is the Evaluation Components.
- \* Evaluation Components Tab shows one line per component.



# Evaluations Crossing Over 23/24 & 24/25 SY

- \* If you have evaluations and:
  - \* One evaluation was completed in the 23/24 SY then complete paper STAC-5 for that evaluation.
  - \* If the other evaluations are July 1, 2024 dates and forward then enter those evaluations into eSTACs.
- \* If you try to enter an evaluation with a date prior to July 1, 2024, you will receive an error when trying to sign/submit the STAC-5.

# eSTACs Uploading Documents

# Documents Required for Evaluations – Cayuga County

 Cayuga County requires the following documents to be uploaded, before you can sign and submit your STAC-5:

#### \* A Medicaid Parental Consent:

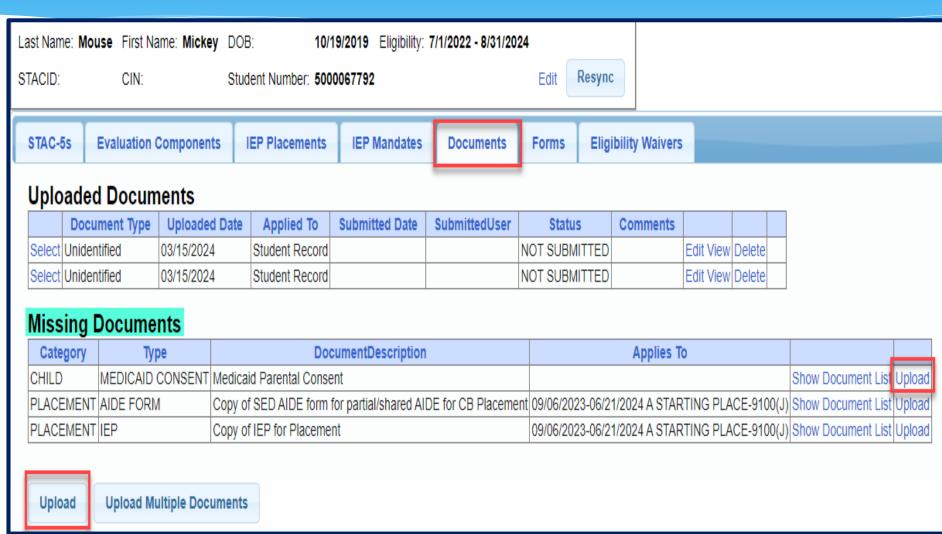
- \* A signed Medicaid Parental Consent or,
- \* An Unable to Obtain Medicaid Consent.

#### \* An Evaluation Justification Letter:

\* Only needed if 2 evaluations need to be completed within the same school year for the same type of evaluation when completing the STAC-5.

# Uploading a Document

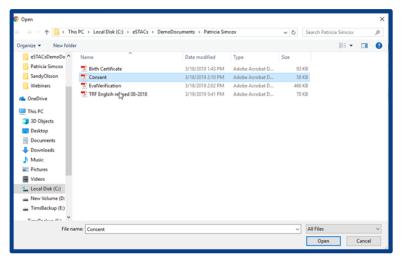
- Select Documents tab on Student Details screen.
- \* This will also show any Missing Documents that need to be uploaded.
- \* Click "Upload" button at bottom of screen or "Upload" at the end of the missing document line.



#### Uploading a Document

- Click "Choose File" button.
- \* Browse to the file location and select the file.
- \* Click the "Open" button on the file dialog
- \* The filename will appear next to "Choose File" button.
- \* Click "Upload".

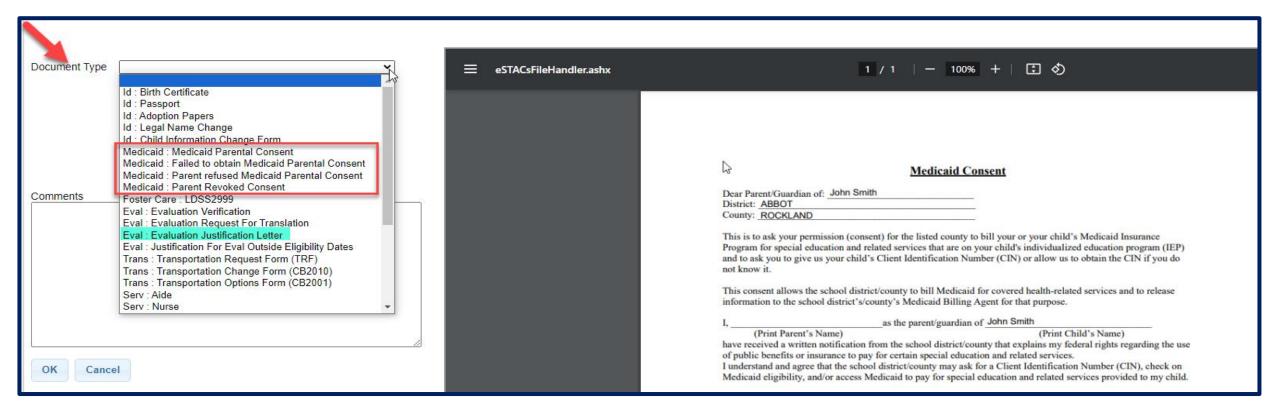






# Indicate Document Type

- \* Right hand side shows the document.
- \* Left hand side shows fields to specify what type of document it is, as well as other related fields specific to the type of document.



# eSTACs Sign and Submit

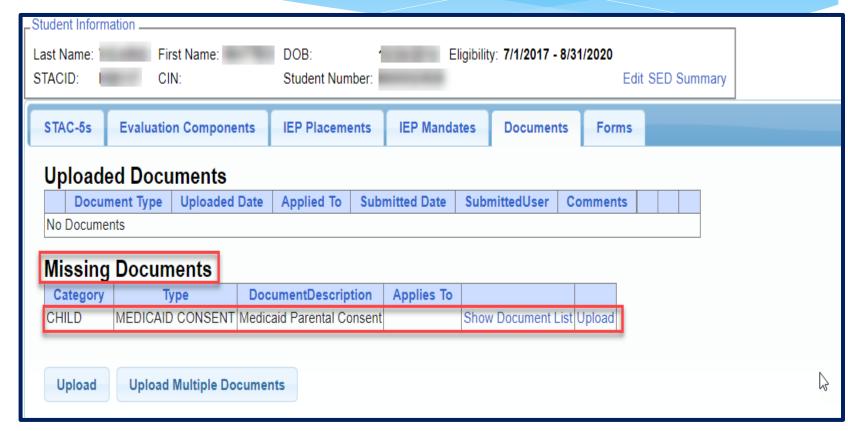
# Sign and Submit Evaluation – Signing Per Student

- \* Once all documents have been uploaded for the evaluation (if any), you can now "Sign and Submit" the STAC-5.
- \* The Status, Submitted By & Submitted Date columns will now show a status of submitted, who submitted the STAC-5, and the date submitted.
- \* This will now be sent to the county for review.



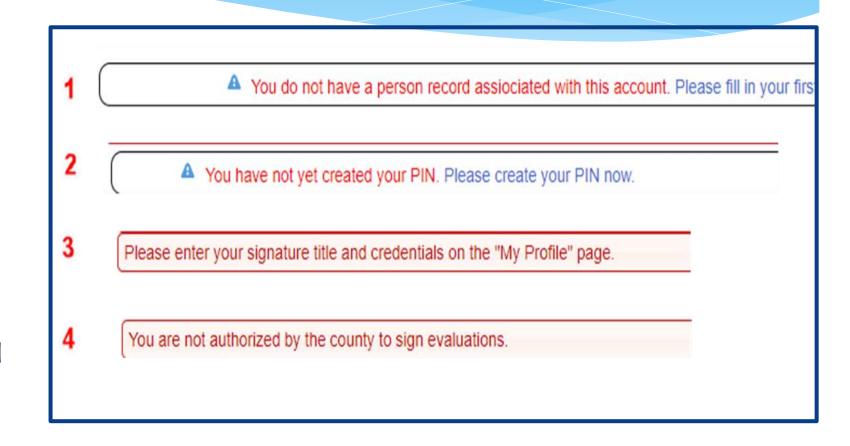
# Submitting Evaluations Error Messages – Missing Document(s)

- \* If all of your documents are not uploaded, you will not be able to sign and submit.
- \* Your error will tell you what documents need to be uploaded.
- \* You can also see the missing documents on the documents tab, under Missing Documents.



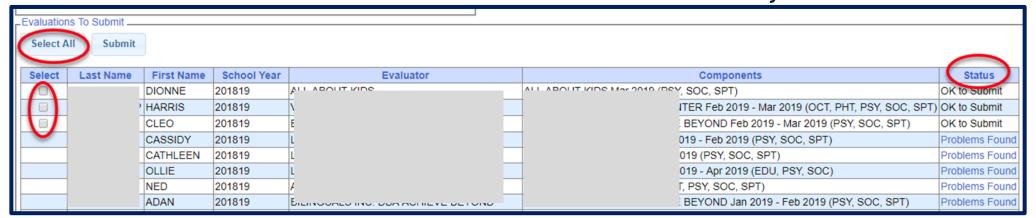
# Submitting Evaluations Error Messages

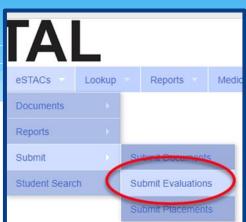
- 1. You did not create your first and last name.
- 2. You did not create a PIN for your Portal account.
- 3. You did not create your signature and title.
- 4. Your district's authorization paperwork was not sent to McGuinness or you are not listed on the paperwork to sign and submit evaluations.

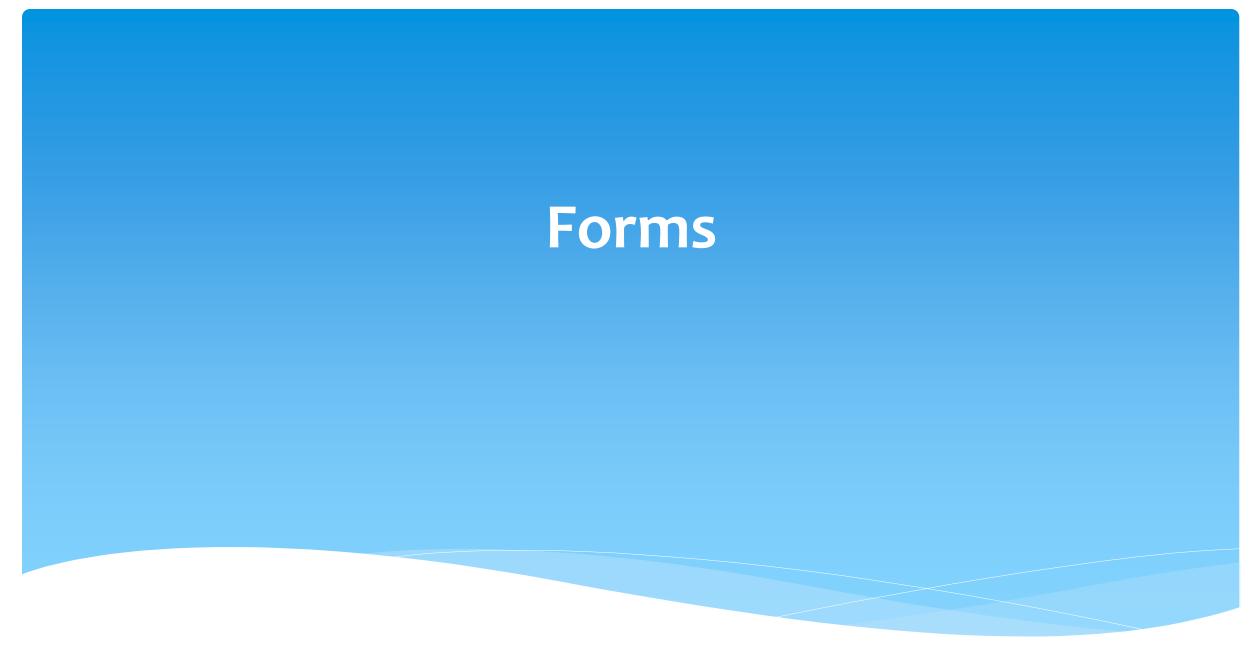


# Sign and Submit Evaluations – Signing All Unsubmitted Evaluations at One Time

- \* Go to eSTACs -> Submit -> Submit Evaluations
- \* This grid displays unsubmitted evaluations based on selected filters.
- \* Rows where Status = "OK To Submit" will have a checkbox.
- \* Rows where Status = "Problems Found" will not have a checkbox.
- \* Mark the checkbox on the rows that you wish to submit to the County or click "Select All".
- \* Click "Submit" to submit the marked evaluations to the County.

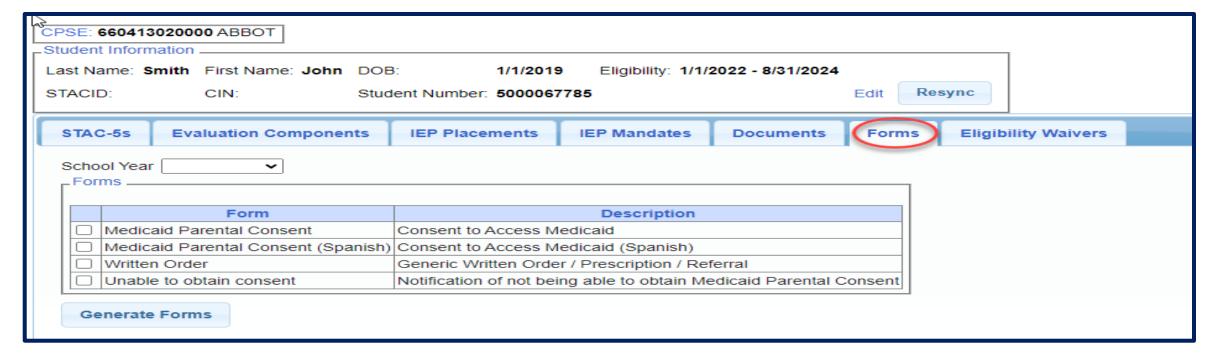






#### Forms Tab

\* The Forms tab has a list of generic forms that when chosen, will populate with the child's information on them.



#### Forms Tab

If your County gave us a Medicaid Consent that they want you to use, your County consent will also populate here. If not, then your school district's name will populate on the top of the consent.

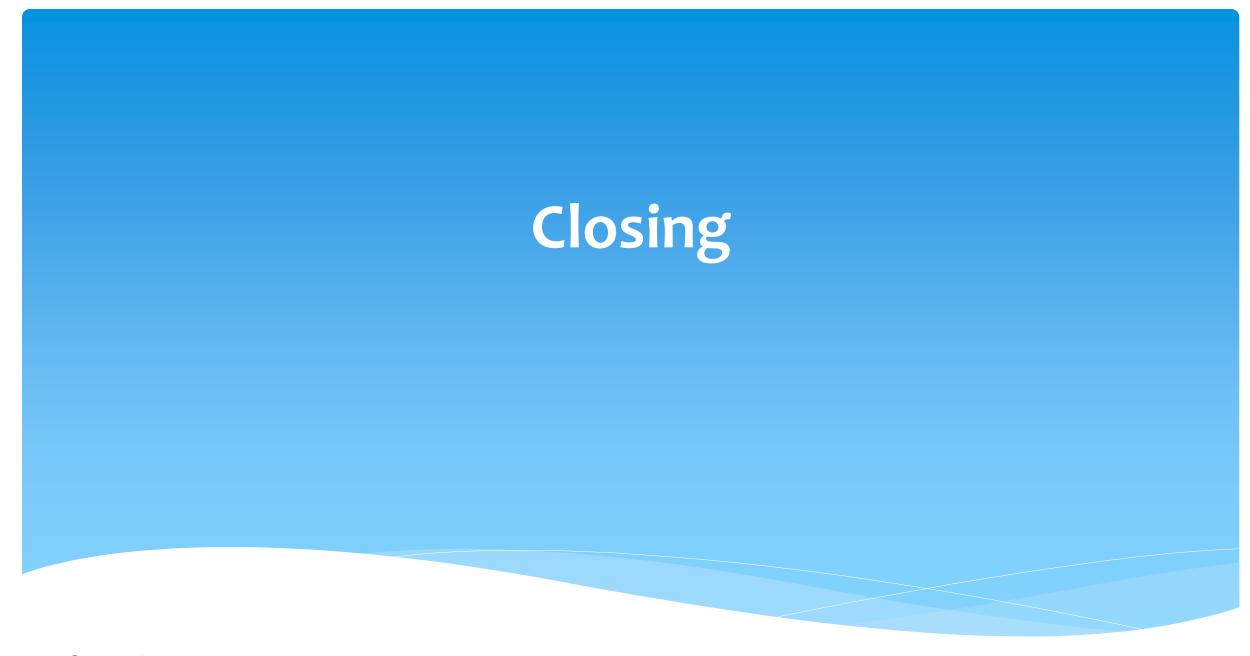
Medicaid Consent							
Dear Parent/Guardian of: John Smith							
District: ABBOT							
County: ROCKLAND							
This is to ask your permission (consent) for the listed cou Program for special education and related services that at and to ask you to give us your child's Client Identification to know it.	re on your child's individualized education program (IEP)						
This consent allows the school district/county to bill Medinformation to the school district's/county's Medicaid Bi							
I,as the parent/guar	dian of John Smith						
(Print Parent's Name) have received a written notification from the school district/county that explains my federal rights regarding the use of public benefits or insurance to pay for certain special education and related services.  I understand and agree that the school district/county may ask for a Client Identification Number (CIN), check on Medicaid eligibility, and/or access Medicaid to pay for special education and related services provided to my child.							
I understand that:  Providing consent will not impact my child's/my Medicaid coverage;  Upon request, I may review copies of records disclosed pursuant to this authorization;  Services listed in my child's IEP must be provided at no cost to me whether or not I give consent to bill Medicaid and/or provide my child's CIN;  I have the right to withdraw consent at any time; and  The school district/county must give me annual written notification of my rights regarding this consent.  I also give my consent for the school district/county to release the following records/ information about my child to the State's Medicaid Agency for the purpose of checking Medicaid eligibility and/or billing for special education							
and related services that are in my child's IEP. The follow	ving records will be shared: nformation about services your child receives)						
Prescription	Service Provider Attendance						
Referral	"Under the Direction of" Certification						
Treatment Logs	"Under the Supervision of" Certification						
Individualized Education Program - IEP	"Under the Direction of" Logs						
Attendance Records	"Under the Supervision of" Logs						
Bus Logs	Calendar						
Other unnamed documents needed to support a claim to Medicaid	Evaluations						
Student's CIN, if known:  I give my consent voluntarily and understand that I may withdraw my consent at any time. I also understand that my child's right to receive special education and related services is in no way dependent on my granting consent and that, regardless of my decision to provide this consent, all the required services in my child's IEP will be provided to my child at no cost to me.							
Parent/Guardian Signature: Date:							
Print Name: Must fill-in full date							

# Eligibility Waivers

## Eligibility Waivers Tab

- \* If you have an evaluation or services that are outside of the eligibility dates, you can choose the Date Type, enter date and click "Add". You can then upload any supporting documentation.
- \* You may need to use this when a child is transitioning from EI into Preschool.





#### Cayuga County Timeline

#### \* March 28, 2024:

\* McGuinness will migrate all of the children that are in the Cayuga County Preschool system over into eSTACs.

#### \* April 1, 2024:

- \* Cayuga County school districts can begin entering 24/25 children and STACs into eSTACs.
- \* All prior year STAC's (23/24, 22/23, 21/22 etc.), send paper STAC to the county to enter or amend in their Preschool system. Prior years will not be turned on in eSTACs and you will not be able to enter any STACs.

## Getting Support

- \* CPSE Portal Address (you may want to bookmark): https://www.cpseportal.com
- \* If you need help you can contact Kelly Knowles at <a href="Kknowles@jmcguinness.com">Kknowles@jmcguinness.com</a>
- \* After you are familiar with the Portal, and you need help, send an email to <a href="mailto:eSTACs@CPSEPortal.com">eSTACs@CPSEPortal.com</a>.
  - \* Please include your district name, which County you work with and a description of your issue.
  - \* Do **not** use child's name
  - \* Use Student # or STAC ID #
- \* If you would like to speak on the phone, please state so in your email along with your phone number and best times to reach you.