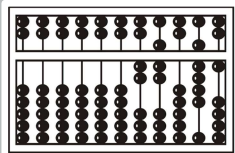


SED Overview for the Preschool Program



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Various SED units / departments

- SED has multiple units that play a role in the Preschool process:
 - **STAC Unit** (<https://www.oms.nysed.gov/stac/>)
The primary unit that Counties will interact with for Preschool.
 - **Rate Setting** (<https://www.oms.nysed.gov/rsu/>)
The Rate Setting Unit approves and issues all rates for Preschool Services
 - **Medicaid in Education** (<https://www.oms.nysed.gov/medicaid/>)
The Medicaid in Education handles all Medicaid Policy for Preschool
Aka. MedinED

STAC Unit: STAC ID's

- SED's STAC Unit issues and maintains children's STAC IDs.
 - A 6-digit number that identifies a child receiving CPSE/CSE services.
 - Processes STAC-ID requests batches.
 - Issues STAC-ID return files.
 - Processes STAC-ID problem spreadsheets.
 - Processes children's name changes & other info changes.

STAC-703 The University of the State of New York THE STATE EDUCATION DEPARTMENT Rev. 08/2023

Child Information Change Form

This form is used by representatives of School Districts and Municipalities to request changes in how a child's name or other identifying information is recorded on the STAC Online (EFRT) System. The STAC Unit will apply the change on EFRT.
District forms must be signed by the district superintendent, director of pupil personnel services, or registrar. County forms must be signed by the municipality representative.

Scan and upload completed forms to SED File Transfer Manager (FTM) "Inbasket".
Email OMSSTAC@nysed.gov with the SED FTM location and filename.
Do NOT attach completed forms to emails.

CHILD INFORMATION AS CURRENTLY DISPLAYED ON THE STAC ONLINE (EFRT) SYSTEM			
Child's Last Name as listed on EFRT	MI	Child's First Name as listed on EFRT	Gender Identity as listed on EFRT <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Non-Binary
Child's STAC ID	Date of Birth as listed on EFRT	Race-Ethnicity as listed on EFRT	

☐ Change Child's First Name to:

☐ Change Child's Middle Initial to:

☐ Change Child's Last Name to:

☐ Change Child's Date of Birth to: / /

STAC Unit: STAC's

- SED's STAC Unit reviews and approves children's evaluations and STAC-1's from counties.
- Approves evaluations (STAC-5).
- Approves services (STAC-1).
- Reviews and approves special programs/services:
 - RNs and LPNs (STAC-812).
 - Assistive Tech Device.
 - "OTHER" type of evaluation components.

[illegible]

STAC Unit: AVL's

- SED's STAC Unit issues and processes Automated Voucher Listings (AVL).
 - Issues AVLs for specific school years over three years.
 - Issues AVL adjustments based on STAC changes.
 - Processes AVL return files.
 - Grants extensions to AVL due dates.
 - Returns AVLs if there are errors.

THE STATE EDUCATION DEPARTMENT / THE UNIVERSITY OF THE STATE OF NEW YORK												
System to Track and Account for Children (STAC) and Medicaid Unit												
AVL Schedule – Section 4410 – Preschool												
April 2024 – March 2025												
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Evaluations												
2020-21		#12 Final										
2021-22				#09				#10			#11	
2022-23		#05				#06			#07			#08
2023-24	#01			#02			#03				#04	
Services												
2020-21		#12 Final			*				*			
2021-22			#09				#10			#11		
2022-23	#05			#06				#07			#08	

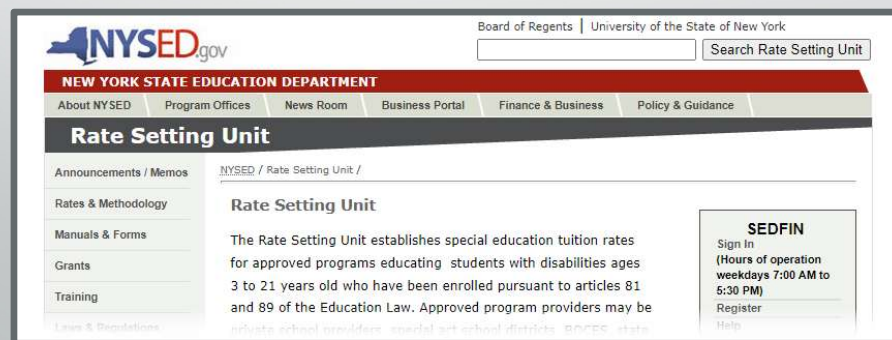
STAC Unit: Programs & Rates

- SED's STAC Unit posts approved programs and rates.
(The STAC Unit does not set the rates.)
 - Posts rates and rate changes to EFRT and Agency Files.
 - The CPSE Portal uses Agency Files to collect program and rate changes daily.
 - Preschool imports the latest program listing from the CPSE Portal.
- (When SED's Rate Setting Unit releases new rates, there may be a delay between the release and the STAC Unit posting the new rates.)

Download PROVIDER Information Files	
File	File Type/Size
Provider	ASC
Provider	TXT
Provider	data dictionary
Download PROGRAM Information Files	
Program (all years)	ASC
Program (all years)	TXT
Program (2010-11)	TXT
Program (2011-12)	TXT
Program (2012-13)	TXT
Program (2013-14)	TXT
Program (2014-15)	TXT
Program (2015-16)	TXT
Program (2016-17)	TXT
Program (2017-18)	TXT
Program (2018-19)	TXT
Program (2019-20)	TXT
Program (2020-21)	TXT
Program (2021-22)	TXT
Program (2022-23)	TXT
Program (2023-24)	TXT
Program (2024-25)	TXT
Program	data dictionary
List of Public School Districts	

Rate Setting Unit

- SED's Rate Setting Unit approves and issues all rates for Preschool Services.
 - Approves CB & SEIT providers' new rates for their programs.
 - Adjusts CB & SEIT providers' existing rates for their programs.
 - Approves Evaluation Rates for SED-approved evaluators.
 - Approves Related Services (RS) rates for each county.
 - Although each county sets its own RS rates, there is a maximum rate for different service types, and whenever that needs to be changed, the Rate Setting Unit needs to approve them.



Medicaid in Education

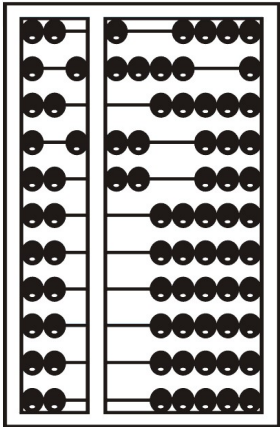
- SED's Medicaid in Education handles all Medicaid Policies for Preschool.
 - Provides training and guidance for Medicaid processes:
 - Claiming and reimbursement for CPSE and CSE services.
 - Creates and updates all Medicaid Policies for CSE and CPSE Services.



Interactions with SED

- The Preschool program interacts mainly with the STAC Unit:
 - | STAC ID's | STAC-1's | STAC-5's | AVL's |
 - Submitting files to and receiving files from the STAC Unit.
 - Imports programs and rates from the STAC Unit for providers to bill under.
- The County Representatives interact with all three SED Units relating to Preschool.
 - Sending STACs with special programs to the STAC Unit on paper.
 - Asking the STAC Unit on what and how to enter services into an STAC.
 - Submits new RS rates for the Rate Setting Unit to approve.
 - Asking Medicaid in Education for questions regarding Medicaid claiming and policies.

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Getting Started with Preschool



Getting Support

- If you need assistance with Preschool, you can always contact us for Support.
- Our office is opened Monday-Friday from 8am to 5pm, we close for lunch from 12pm to 1pm.
- You can reach us through email at preschoolsupport@cpseportal.com
 - You can also email your Preschool CRM directly
- If you'd prefer to call our phone number is (518) 393-3635

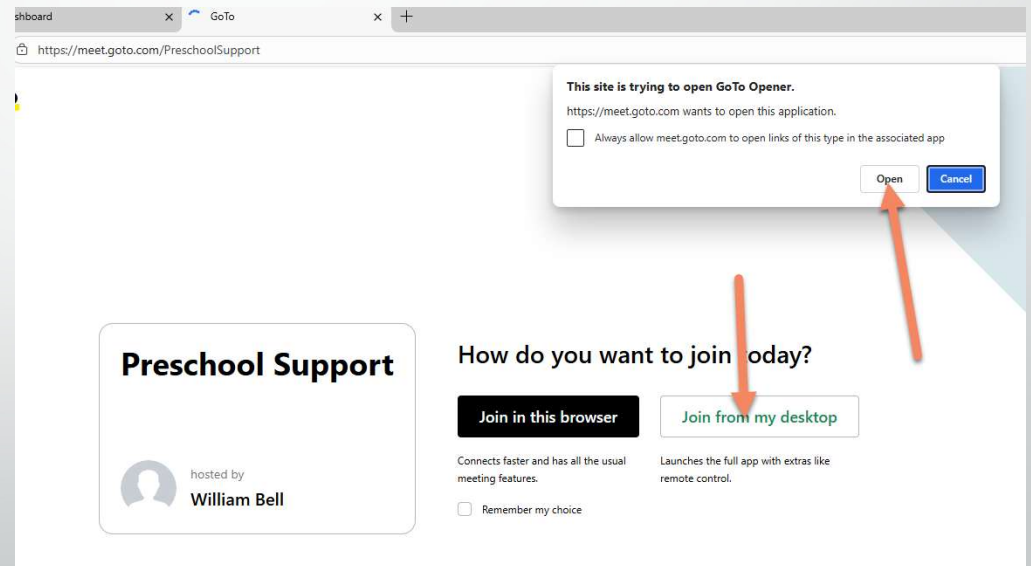


Go To Meeting

- We use Go To Meeting for our support meetings.
- In order to best assist you, we ask you to share your screen and may sometime ask for keyboard and mouse control.

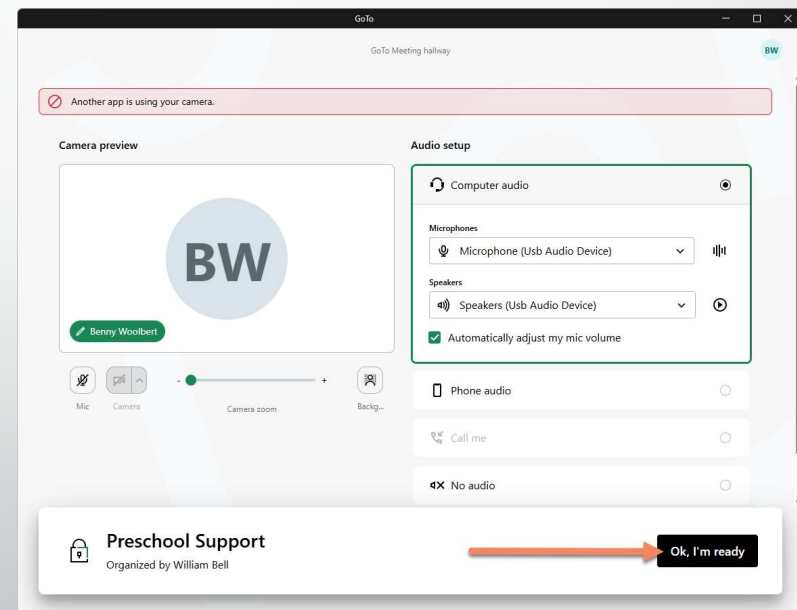
Joining a Go To Meeting

- When you Join a go to Meeting you have two options:
- Browser or Desktop
- We recommend joining from the desktop as the desktop app has much more functionality.
- Once you select the Join from desktop your browser will display a pop up window, select the “Open Go To Opener” button.

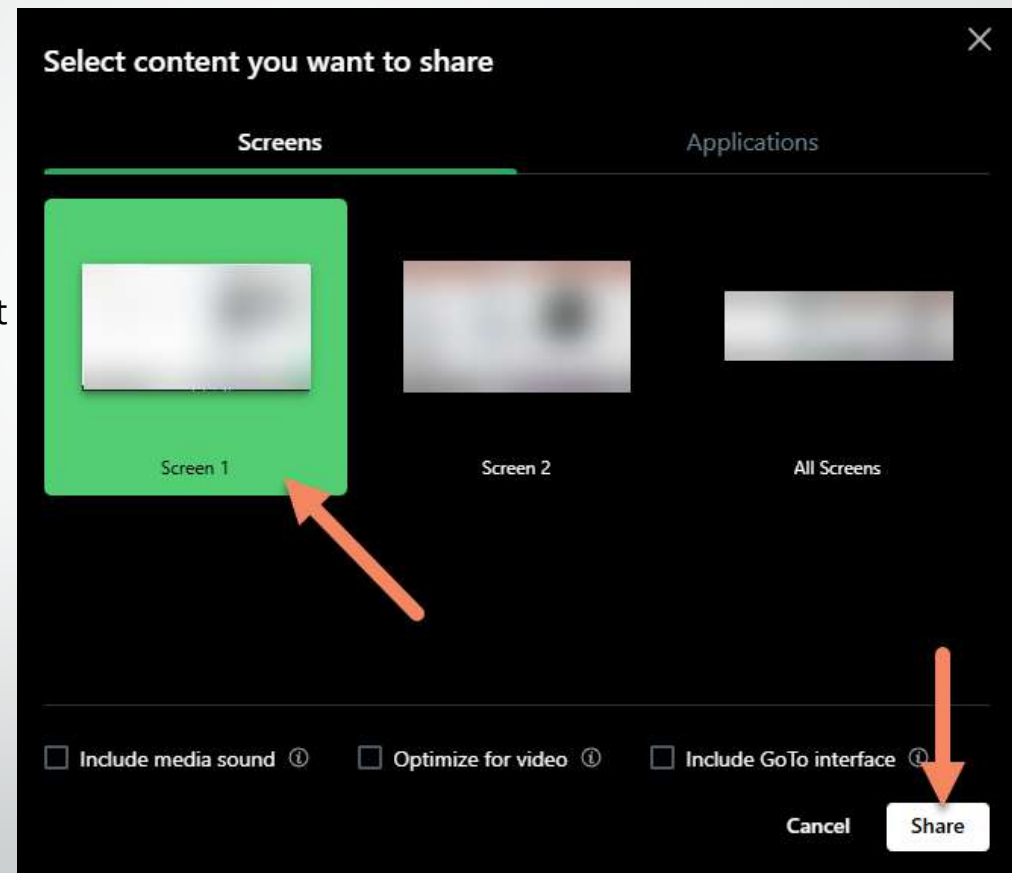


Choosing your audio settings in Go To Meeting

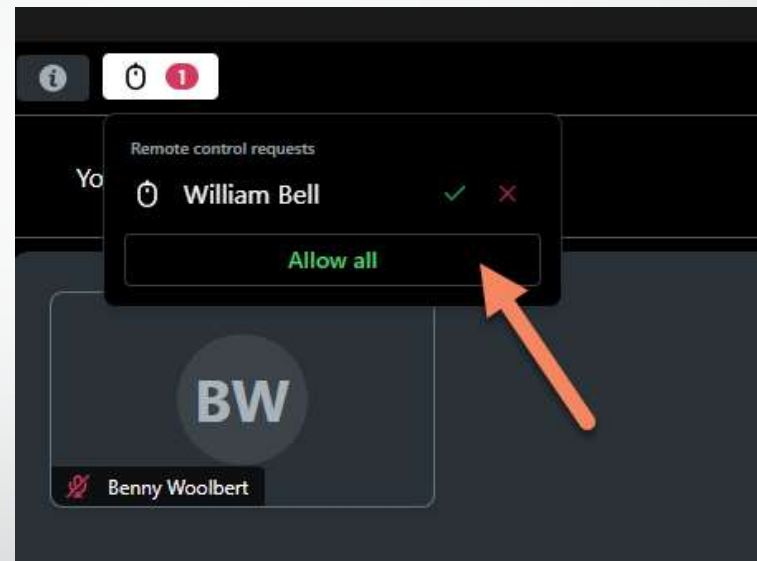
- Next you will see the audio screen
- There are two choices, computer audio or phone audio
- If you have a headset and microphone, you can choose computer audio.
- If you do not have a headset or microphone you can always call in using the provided number.



- To share your screen, click the Share button at the bottom of the screen.
- Then click on the Screens tab, choose the screen that you want to share and then click the Share button.



- If we need to take control of the screen, we will send out a remote control request, which will appear as a small pop-up window in the top-left corner of your GoTo interface. Clicking “Allow all” will grant us the permission to remote control the screen that you’



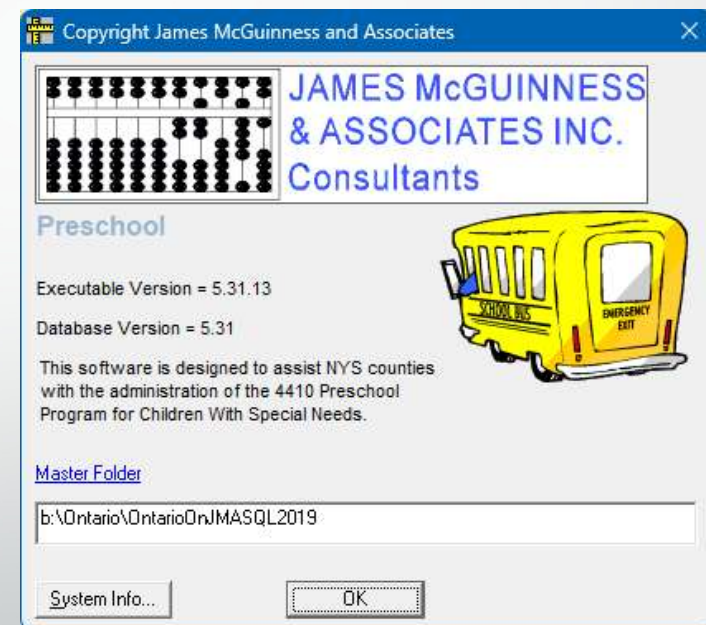
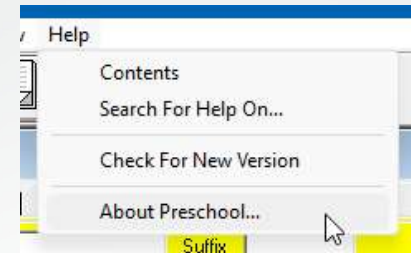


Navigating Preschool

Opening Preschool

- Your Preschool Icon should always point to c:\program files(x86)\Preschool\Launcher.exe
- The icon If your launcher is not pointed at the correct place, you may get an error when attempting to open Preschool. If this happens, please contact us.

- In Preschool, the Help Tab has the About Preschool selection.
- This will tell you what version of Preschool you are running as well as the database version.
- The executable version will always have additional numbers ex (5.31.13) while the database version will only have two sets of numbers (5.31)
- It will also display a link to the Network Path to the Production folder on your County Network.
- The Master Folder link will open the Production folder



- Look Up child, there are two ways to look up children.
- The first way is the child list, it will display a list of all children in your Preschool system for all school years.
- You are able to filter the list based on the last name, DOB, or District.
- To open the child list click the Look Up Child button at the top left.

Preschool (24-25 2 Month)

File Child / Services Payments Claims Providers CPSE Portal Reports Medicaid Maintenance S

Lookup Child 

Child / Services

Child / STAC Info 

Current Child DOB Eligibility STAC ID Current Se

24-25 2 Mo

Child & STAC Maintenance

Child

Last Name*

ChildNew

Search Name

☒ Name ☐ AKA
☐ DOB ☐ SS#

District Filter All Districts

LastName	FirstName	AKA	DOB	Sex	SSNumber	District	SED Stac ID	CIN
			06/30/21	M		CANANDAIGUA	L28611	
			08/24/15	M		CANANDAIGUA	H77128	
			11/09/17	M		GENEVA CITY SD	K02829	
			01/18/12	F		EAST	F64936	
			09/09/17	F		WATSON SD	104999	

- If you press Ctrl+F on your keyboard you will open the new child search function.
- This search has additional fields that you can use including the STACID, ESID, eSTAC's Student Number, and CIN.
- This search can be made the default search for Preschool if you choose.



The screenshot shows a web application window titled "ChildNew". The form is set against a yellow background and contains several input fields and buttons. The fields are: "Name (Last,First)" with a text input; "Born on or After" with a date input showing "12/01/15" and a dropdown arrow; "SED STAC ID" with a text input; "CIN" with a text input; "Date of Birth" with a date input showing "MM/DD/YY" and a dropdown arrow; "Electronic Service ID" with a text input; and "eSTACs Student #" with a text input. There are "Search" and "Clear" buttons on the right side of the form. Below the input fields is a large, empty gray rectangular area. At the bottom right of the window are "Select" and "Cancel" buttons.

- Once you have looked up a child, the child screen will show some basic info about the child.
- You will see the name, eligibility, STACID, Services in the current session as well as other demographic information
- If you click on the Blue STACID at the top of the screen, the SED summary information will display

Child Information Form

Last Name* JACOBIE Suffix

First Name* JOHN M.I.

AKA Alternate Names

DOB* 01/21/2020 Elig: 01/01/23 - 08/31/25

Sex* M Race/Ethnic* White

District* ALBANY CITY SD

Foster County

STAC ID Current Sess.

5 M05690 24-25 10 Month

RS ST,ST1

SED Child Summary

DOB Eligibility STAC ID Current Sess.

1/21/2020 01/01/23 - 08/31/25 M05690 24-25 10 Month

RS ST,ST1

SED Child Summary

Last Name First Name MI STACID M05690

DOB Gender Race/Ethnicity

STACs Evals

School Year

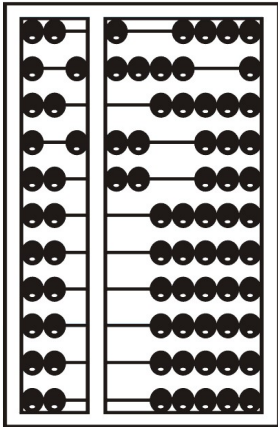
Show All Details Only show details for selected STAC

Year	Session	Rec#	Begin	End	Type	And	DistrictName	Educ Provider	Multi	Prov is Eval	Issued	Summary	CPSE Code	Provider

Details

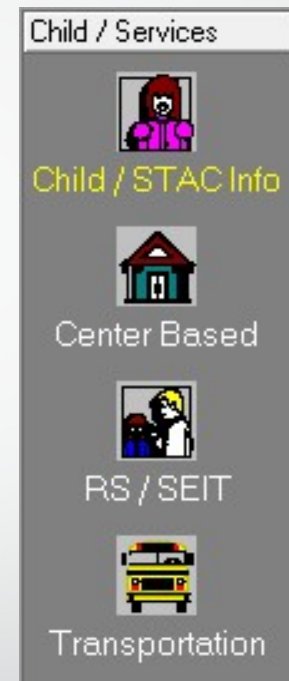
Service	Program	Begin	EndDate	Hrs/Day	Days/Week	Aide%	Aide Rate	Ind/Gip	30-min sess	FTE	Rate	Approved	Prior Claimed	Available

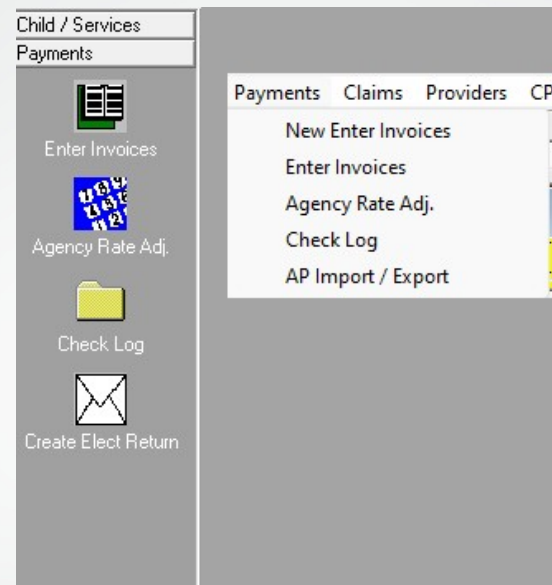
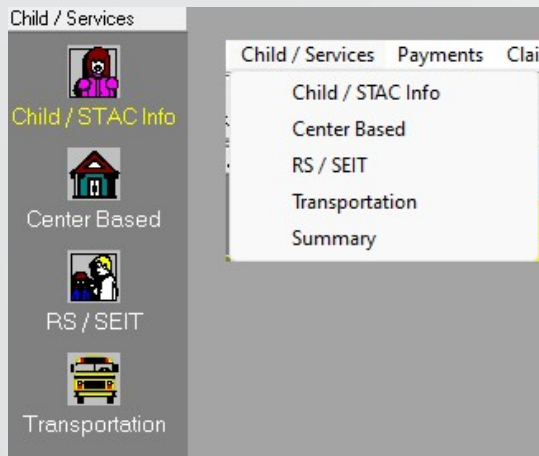
Close



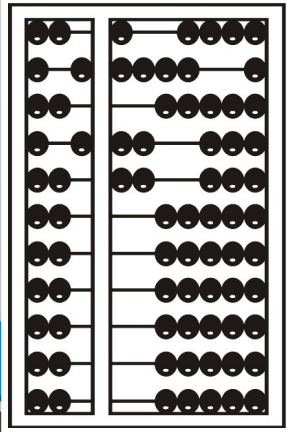
Side Navigation Options

- The Left hand side of Preschool has navigation options.
- The Child/STAC Info button allows you to see the child demographic info, STAC's, and Eval's screens.
- The Center Based button takes you to the Center Based Enrollment screen which will display any CB or CBRs enrollments.
- The RS/SEIT button takes you to the RS/SEIT Enrollment screen, which will display any SEIT or RS enrollments.





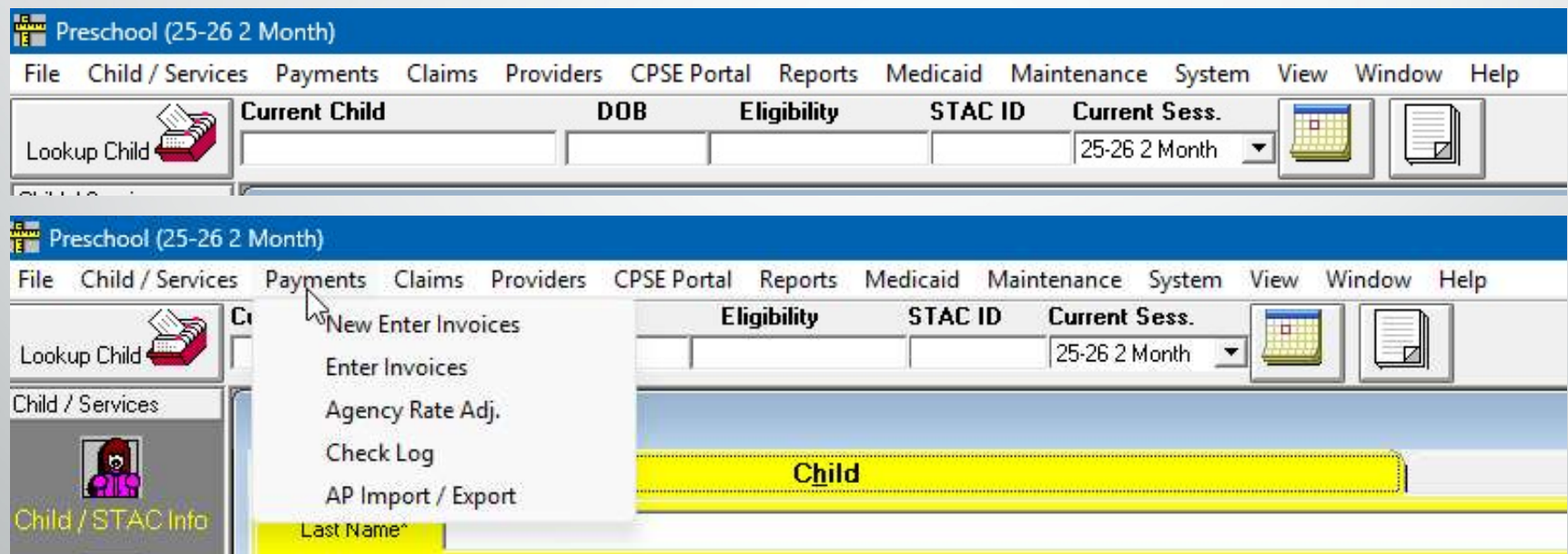
- There are additional Side Navigation options should you choose to use them.
- These side navigation options generally display the same options as the Tabs do once you choose a category.
- If you “got lost” in the side menu, you can always click the top “Child/Services” folder to get back to the “Familiar Four”.



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Navigation Tabs

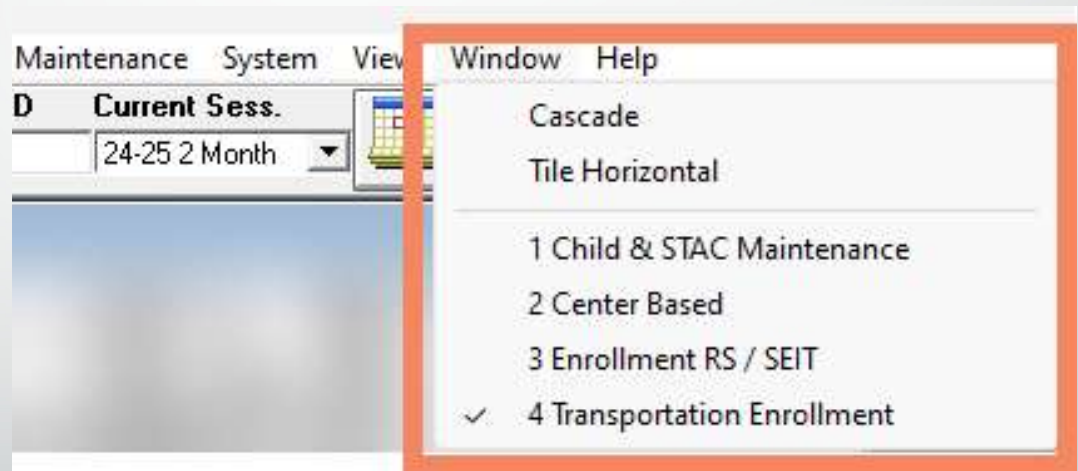
- Along the top of the screen are Tabs
- Each tab has options to select once you mouse over the tab

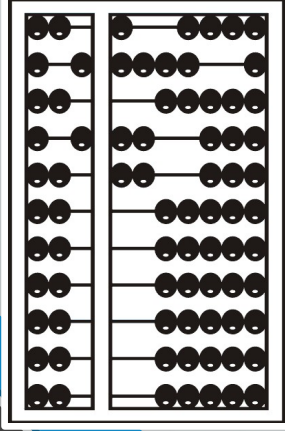


The “Window” menu.

When you are working with multiple different windows in Preschool, and you need to get to a previous screen that you were working on.

Instead of closing all the other screens. You can use the “Window” menu to bring the screen you want back to the top.





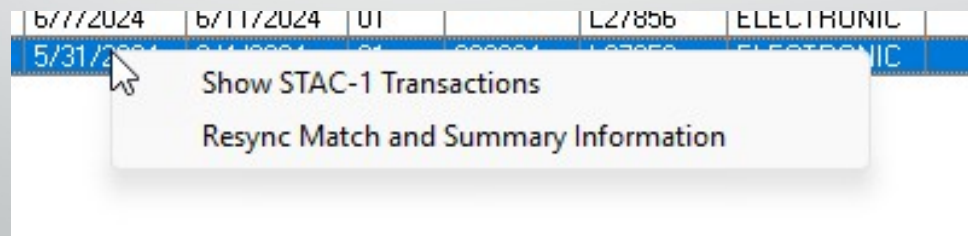
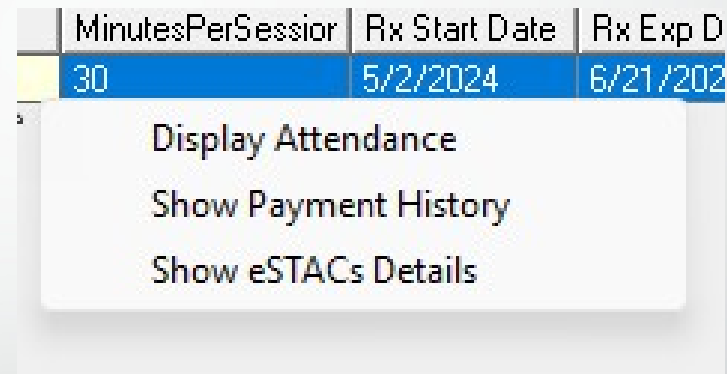
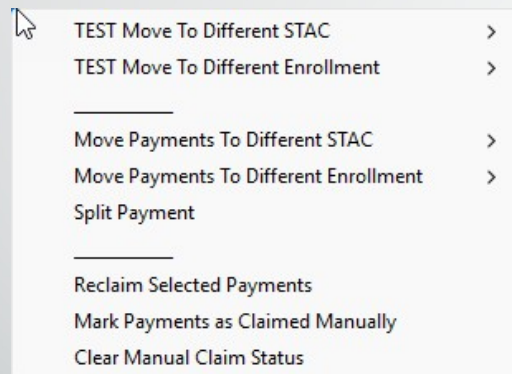
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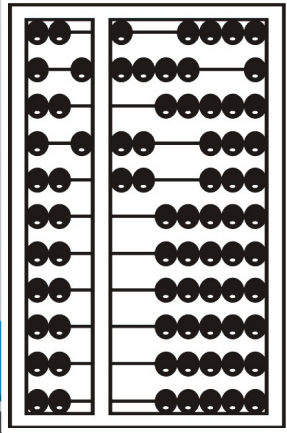
Grids

- Selecting items on grids can be done in three primary ways
- Single Select (Left Click)
- Multi-Select (Hold the Ctrl Key on the Keyboard and Left Click)
- Multi Select Range (Left click on one row, then Hold the Shift key and click on another row above or below to select all rows)
- This is usually done on the Payment or Attendance screens.

	Label	Month	Adj	Amount	Status	PaymentBatch	BatchDate	Check#	CheckDate	ClaimBatch	ClaimDate	Rec#	ClaimServiceType	Payee
▶	A	09/2023	R	\$4,207.88	PAID	24-2059	05/23/25					X1	EDUC	6535
	A	10/2023	R	\$4,207.88	PAID	24-2059	05/23/25					X1	EDUC	6535
	A	11/2023	R	\$4,207.88	PAID	24-2059	05/23/25					X1	EDUC	6535
	A	12/2023	R	\$4,207.88	PAID	24-2059	05/23/25					X1	EDUC	6535
	A	01/2024	R	\$4,207.88	PAID	24-2059	05/23/25					X1	EDUC	6535
	A	02/2024	R	\$4,207.88	PAID	24-2059	05/23/25					X1	EDUC	6535
	A	03/2024	R	\$4,207.88	PAID	24-2059	05/23/25					X1	EDUC	6535
	A	04/2024	R	\$4,207.88	PAID	24-2059	05/23/25					X1	EDUC	6535
	A	05/2024	R	\$4,207.88	PAID	24-2059	05/23/25					X1	EDUC	6535
	A	06/2024	R	\$3,156.08	PAID	24-2059	05/23/25					X1	EDUC	6535

- Once you have something selected in a Grid, you may be able to right click it depending on what it is.
- Attendance and Payments can be moved
- Right clicking on enrollments can display attendance
- Right clicking on a STAC can display the Transmission History.





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Core Screens

Child Screen, Child Tab

- The Child Screen has three tabs
- Child, STAC, and Eval
- The child tab displays demographic info as well as the STACID, Medicaid info, and Claiming info

The screenshot displays the 'Child & STAC Maintenance' application window with the 'Child' tab selected. The form is divided into three main sections: Child, STACs, and Evals.

Child Section:

- Last Name*: JACOBIE
- First Name*: JOHN
- AKA: [Empty]
- DOB*: 01/21/2020 (Elig: 01/01/23 - 06/31/25)
- Sex*: M
- Race/Ethnic*: White
- District*: ALBANY CITY SD
- Foster County: [Empty]
- Address: [Empty]
- Suffix: [Empty]
- M.I.: [Empty]
- Alternate Names: [Empty]

STACs Section:

- STAC ID: M05690
- SSN: [Empty]
- eSTACs Student #: [Empty]
- CIN #: [Empty]

Evals Section:

- Buttons: New, Apply, Lookup Child, Delete, Summary
- Buttons: Add Child to CIN Lookup, Medicaid Consent and Eligibility, Upload to CPSE Portal
- Checkboxes: Has Assistive Tech Device, Has ABA

Child Activity Log:

[View Full Log](#) [Add]

Category	Date	Time	Activity	AddedBy	Added
----------	------	------	----------	---------	-------

Child Screen STAC's Tab

- The STAC's tab will display all of the STAC's (both STAC-1's and STAC-5's) that have been entered into Preschool
- From here you can make changes to your STAC-1 and see transmission history for them

The screenshot shows a software window titled "Child & STAC Maintenance". It has three tabs: "Child", "Stacs" (which is selected and highlighted in yellow), and "Evals". The "Stacs" tab contains a table with the following columns: Type, Session, District, Rejected, Last Sent, Last App'd, Rec#, Year, SEDStac#, X-Mit, DualSTAC, Force, OKToSend, and Status. There are three rows of data in the table, all from "ALBANY CITY SD" with SEDStac# "M09690". To the right of the table is a cyan-colored panel with four buttons: "New", "Apply", "Delete", and "Details".

Type	Session	District	Rejected	Last Sent	Last App'd	Rec#	Year	SEDStac#	X-Mit	DualSTAC	Force	OKToSend	Status
CB	25-26 2 Month	ALBANY CITY SD						M09690	ELECTRONIC	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
SEIT	24-25 10 Month	ALBANY CITY SD						M09690	ELECTRONIC	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CB	23-24 10 Month	ALBANY CITY SD						M09690	ELECTRONIC	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Child Screen Eval's Tab

- The Evals Tab will display all of the Evals that have been entered for the child.
- From here you can make changes to the Evals

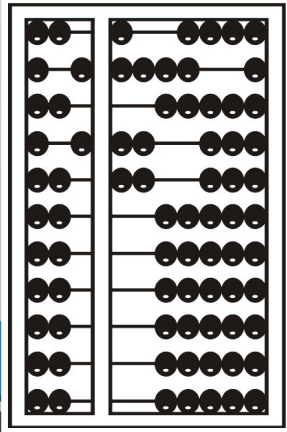
Child & STAC Maintenance

Child Stacs **Evals**

HasEval	Eval Date	Eval Type	Bi-Lingual	Rate
<input type="checkbox"/>		Physical/Medical	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	1/3/2023	Social	<input type="checkbox"/>	\$138.00
<input checked="" type="checkbox"/>	1/3/2023	Psychological	<input type="checkbox"/>	\$240.00
<input type="checkbox"/>		Speech/Language	<input type="checkbox"/>	
<input type="checkbox"/>		Physical Therapy	<input type="checkbox"/>	
<input type="checkbox"/>		Occupational Therapy	<input type="checkbox"/>	
<input type="checkbox"/>		Education	<input type="checkbox"/>	
<input type="checkbox"/>		Audiological	<input type="checkbox"/>	
<input type="checkbox"/>		Other (Physician)	<input type="checkbox"/>	
<input type="checkbox"/>		Other (Non-Physician)	<input type="checkbox"/>	
<input type="checkbox"/>		Psychiatric	<input type="checkbox"/>	
<input type="checkbox"/>		Music	<input type="checkbox"/>	
<input type="checkbox"/>		Teacher of the	<input type="checkbox"/>	
<input type="checkbox"/>			<input type="checkbox"/>	

Evaluator: ACHIEVEMENTS
District: North Colonie 0809
Foster County:
CPSE Date: 02/27/2023 Translation Cost: 0
☒ Child is a preschooler with a disability
STAC ID: K50210 EVAL #: 01
Comments:

District	Evaluator	CPSE Date	Disabled	Comments	STACID	Eval#	TranslationCost
North Colonie 0809	ACHIEVEMENTS	2/27/2023	<input checked="" type="checkbox"/>		K50210	01	\$0.00
North Colonie 0809	ACHIEVEMENTS	8/5/2024	<input checked="" type="checkbox"/>		K50210	01	\$0.00

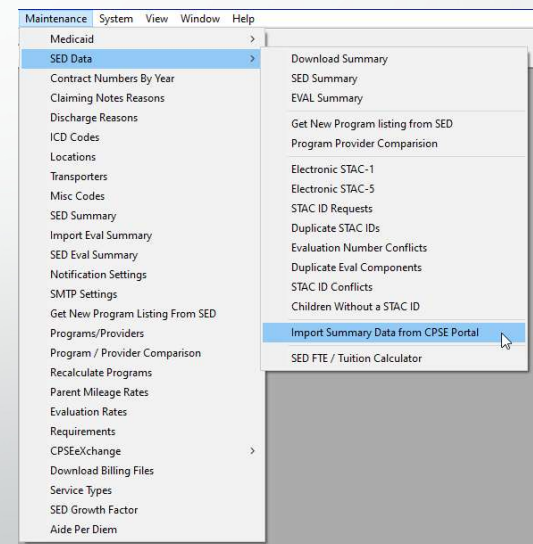


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SED Summary

Importing Summary Files

- To Import Summary Files go to the Maintenance tab > SED Data and click on 'Import Summary Data from CPSE Portal'
- You can use this whether you use CPSE Portal or not.
- This process should be completed on a weekly basis.



- This is the Import Summary from CPSE Portal screen.
- Start by selecting the school year you want to import data for
- Then click Import Summary
- Finally click the Update/Auto Match button

Import SED Summary from CPSE Portal

School Year: 202425

Evaluations	Services
Import Evaluation Summary	Import Service Summary
Update Evaluations From SED Summary	Auto Match Services (STAC-1)



Closing

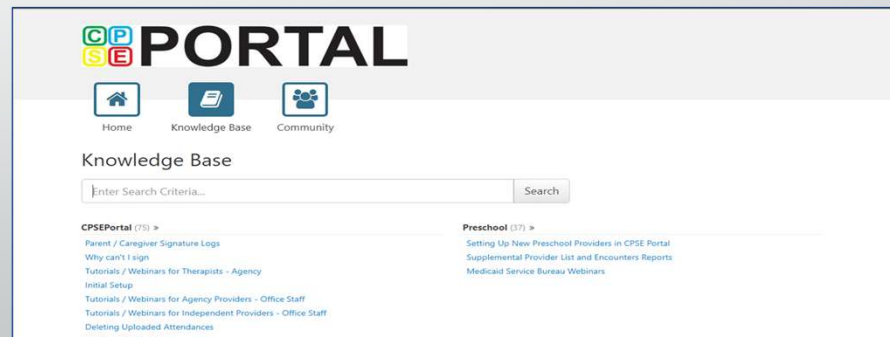
Support@CPSEPortal.com

Preschool 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 Preschool support.
- You can simply click the Knowledge Base tab in the Portal or you can go to:

- <http://support.cpseportal.com/kb>

Support@CPSEPortal.com



Handy Links

- SED STAC Unit Website <https://www.oms.nysed.gov/stac/>
- SED Rate Setting Unit Website <https://www.oms.nysed.gov/rsu/>
- SED Medicaid in Education Website <https://www.oms.nysed.gov/medicaid/>
- SED STAC Forms https://www.oms.nysed.gov/stac/contact_us/form_requests/
- SED Medicaid Q&As https://www.oms.nysed.gov/medicaid/q_and_a/
- SED Medicaid Training Materials https://www.oms.nysed.gov/medicaid/training_materials/
- SED Medicaid Alerts https://www.oms.nysed.gov/medicaid/medicaid_alerts/

Knowledge Base Articles

- Send STACID Batch to SED <http://support.cpseportal.com/kb/a168/stac-id-process.aspx>
- Send STAC-1 Batch to SED <http://support.cpseportal.com/kb/a113/submitting-stac-1s-to-nysed.aspx>
- Send STAC-5 Batch to SED <http://support.cpseportal.com/kb/a619/submitting-stac-5s-to-nysed.aspx>
- Import Summary Data <http://support.cpseportal.com/kb/a115/download-sed-summary-file-stac-eval.aspx>

Closing remarks

- In addition to the Knowledge base, our Helpdesk is available through email at PreschoolSupport@CPSEPortal.com
 - When sending an email:
 - Do not use child's name
 - Use STAC ID # or ESID #
 - Include your county, and info needed
 - Or you can reach out to your designated Preschool CRM directly via email or phone