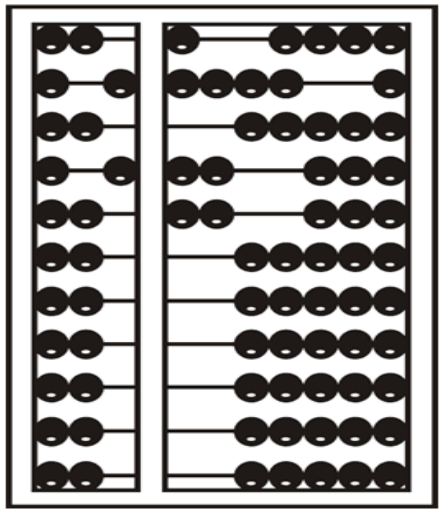
JAMES McGUINNESS & ASSOCIATES INC.
Consultants



eSTACs Training

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	☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐

We certify that for any STAC-5 that the above individuals electronically sign and submit through the eSTACs system, the child has received the submitted multidisciplinary evaluation in accordance with Section 4410 of the Education Law and the Regulations of the Commissioner of Education and we maintain proper documentation to support this.

We certify that for any STAC-1 that the above individuals electronically sign and submit through the eSTACs system, the preschool student with a disability is being provided the educational services submitted and that such services have been recommended by the Committee on Preschool Education and that the child is eligible for such placement in accordance with Section 4410 of the Education Law and the Regulations of the Commissioner of Education and we maintain proper documentation to support this.

_____ Name

_____ Title

Please fax the completed form to (518) 393-9938 attention eSTACs.

_____ Signature

_____ Date

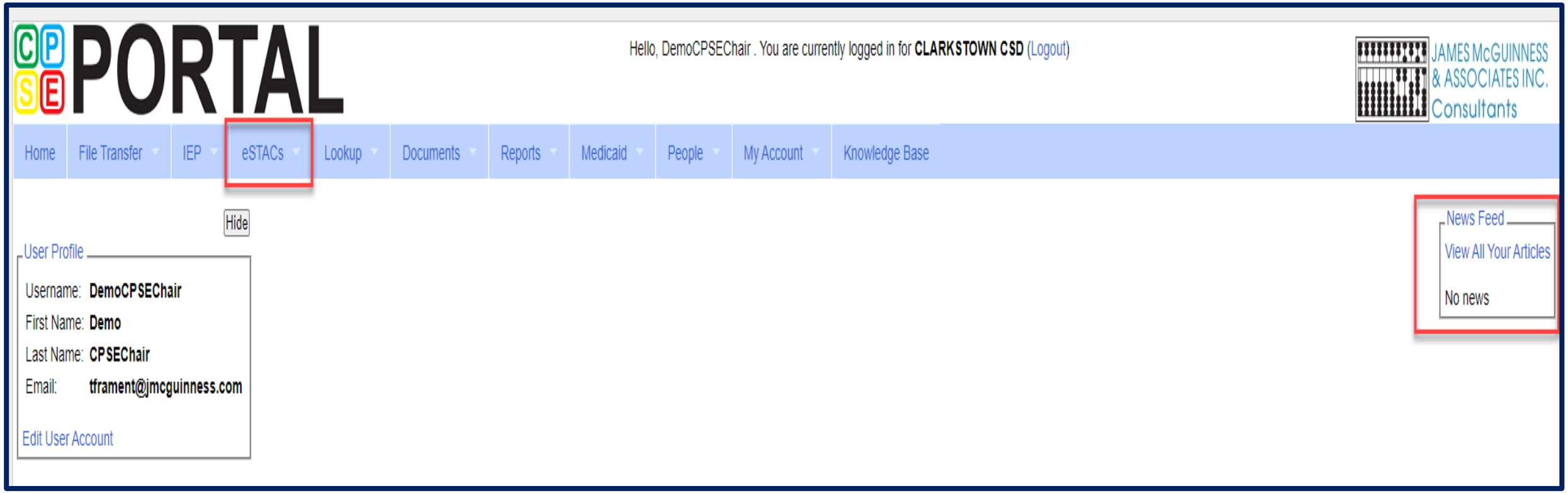
School Districts Who Are Also Providing Preschool Services

* If you are a district who also provides services to Preschool students, you will have two logins for the Portal.
  * One login will be your district login. Under your district username you will have access to eSTACs.
  * The second login will be your provider login. Under your provider username login you will have access to all students assigned to your district, billing etc.

Getting Started

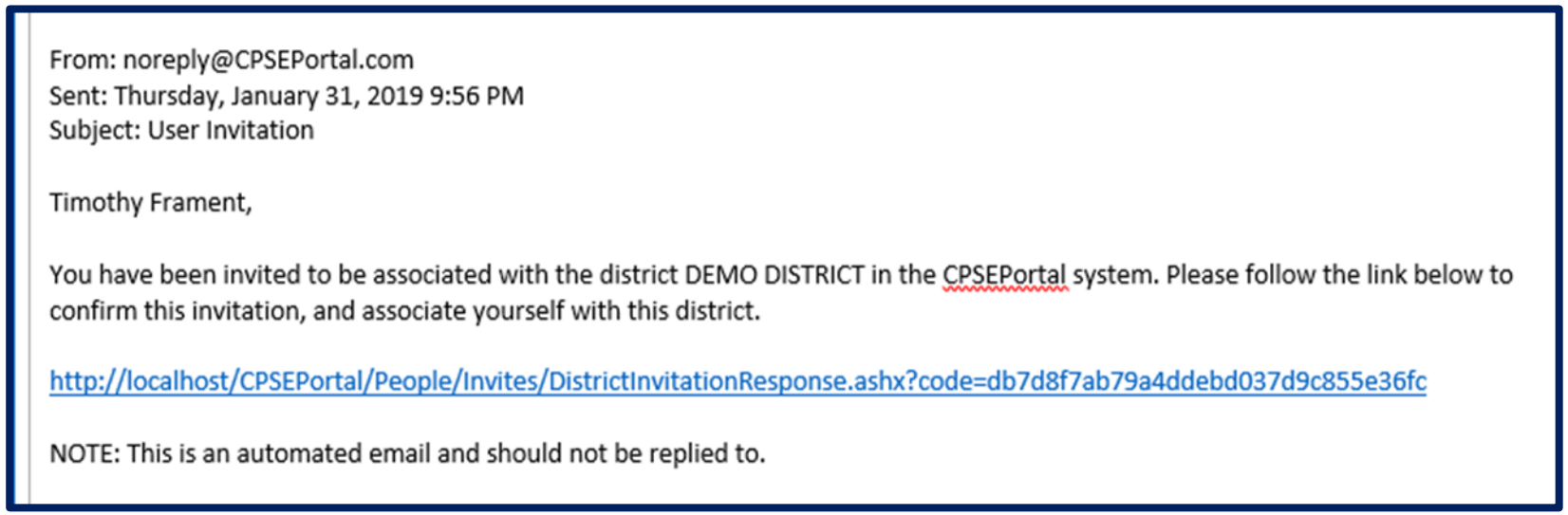
Home Page of Portal

* You will be using the eSTACs tab on your home page.
  * You will also use the My Account & People tabs.
* You will also see News Feed articles on the right side of your home page.



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**.
  * Check your spam or junk mail if you do not receive the email.



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 CPSEPortal system. Please follow the link below to confirm this invitation, and associate yourself with this district.

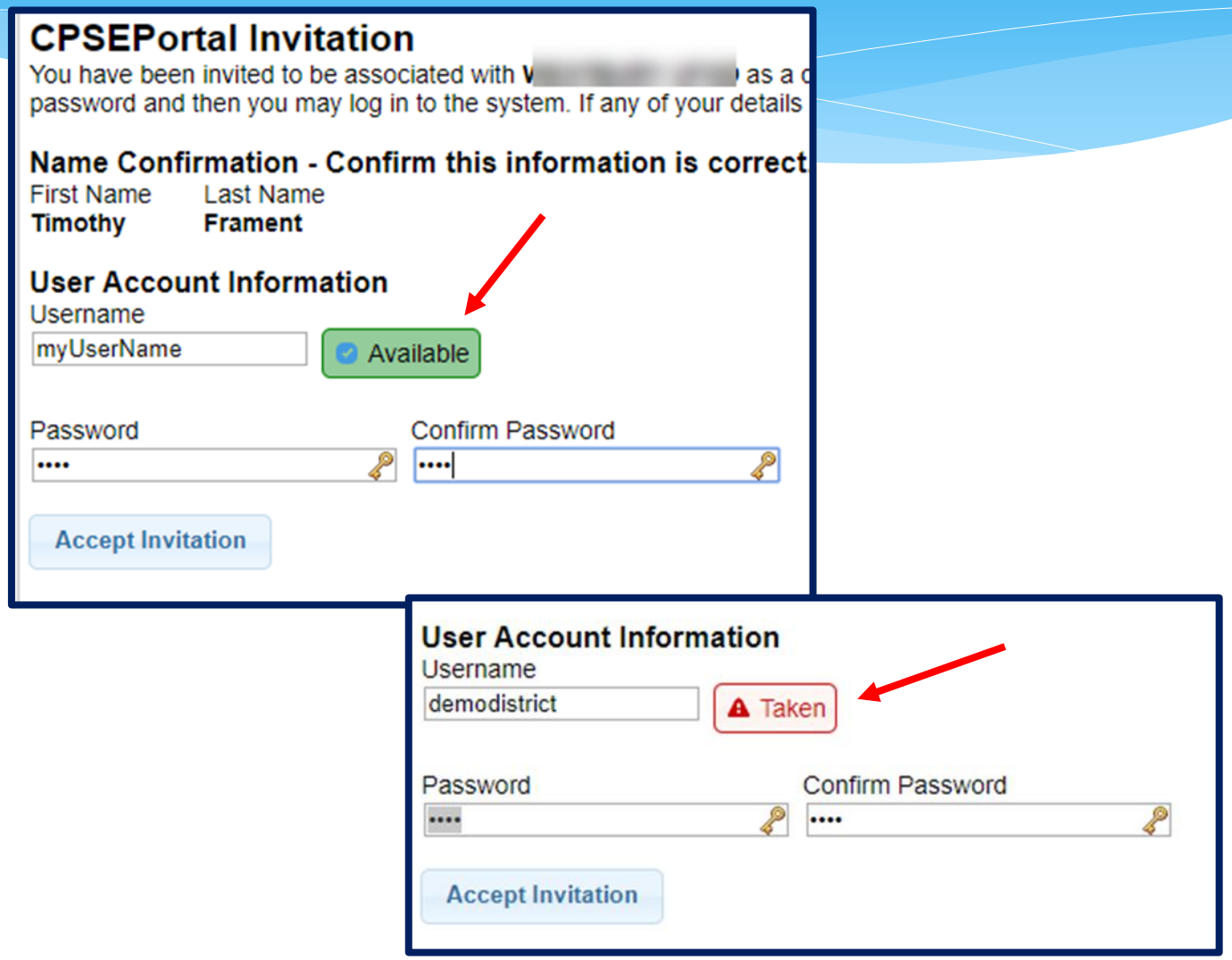
http://localhost/CPSEPortal/People/Invites/DistrictInvitationResponse.ashx?code=db7d8f7ab79a4ddebd037d9c855e36fc

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*".

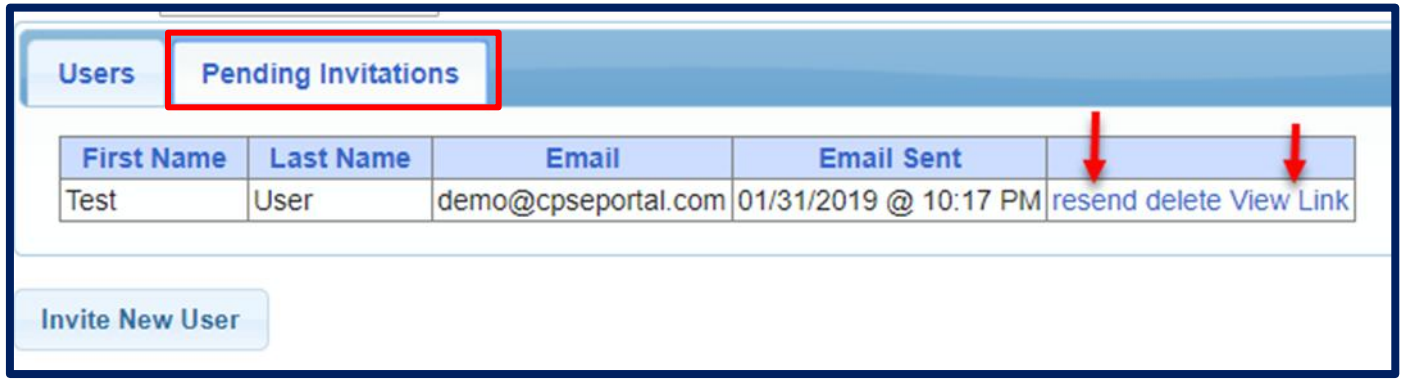
* When the individual enters their choice for a username the screen will display whether that name is available or not.

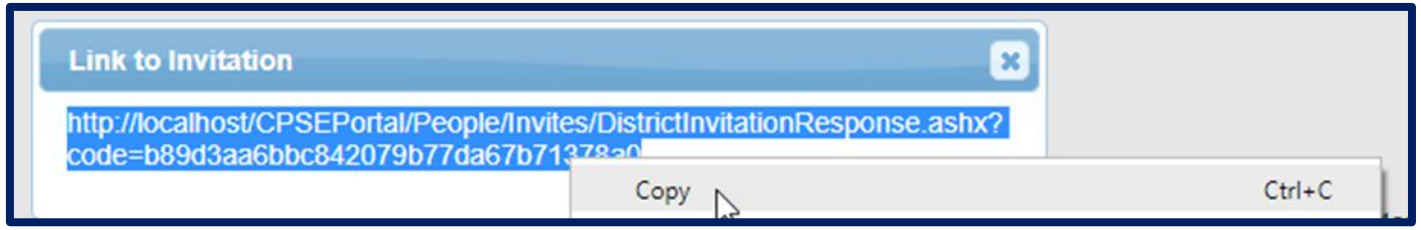


Invitation Issues – User did not receive an email

* 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 under your email address

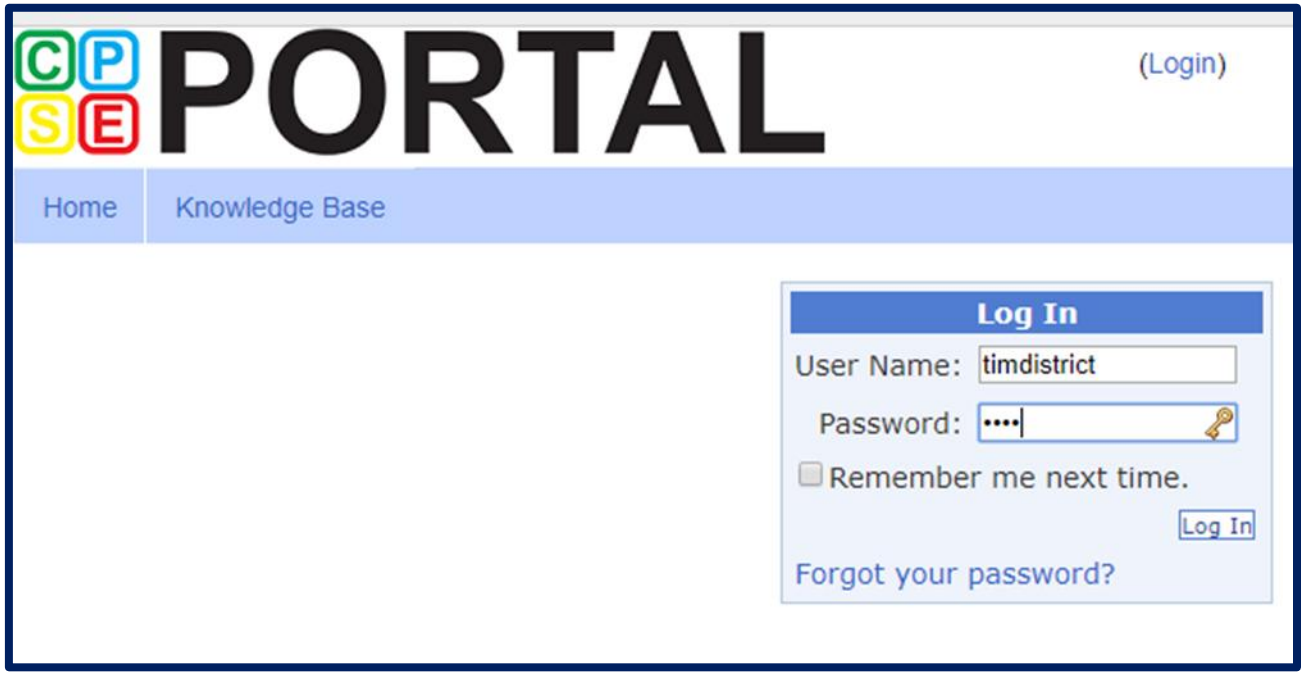




Logging In

* Use your browser to navigate to ***https://www.cpseportal.com***

* Enter your User Name and password.

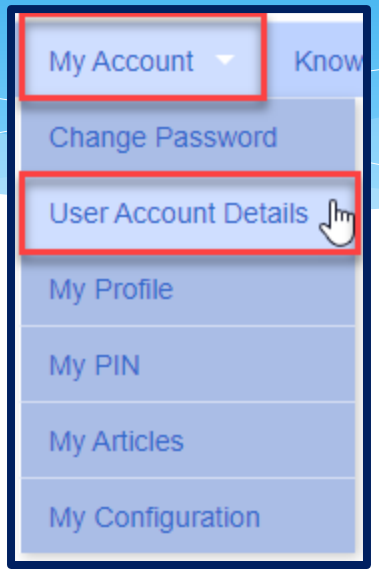


User Profile

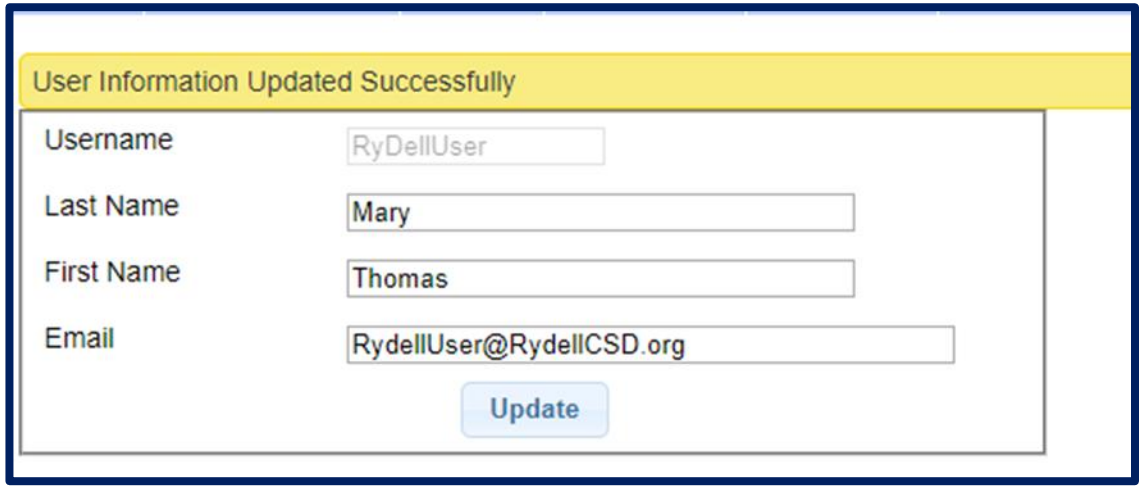
* The user's account should have that individuals first and last name associated with the account.

* 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.

Step 1 – First & Last Name

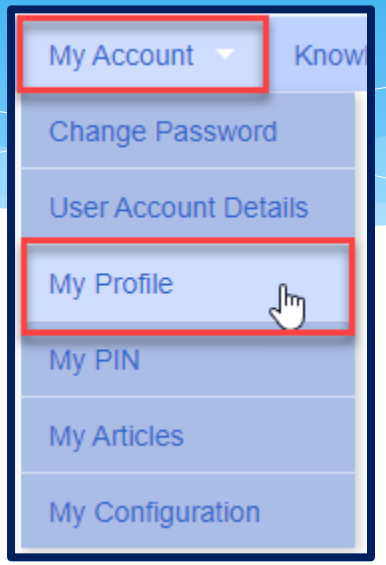


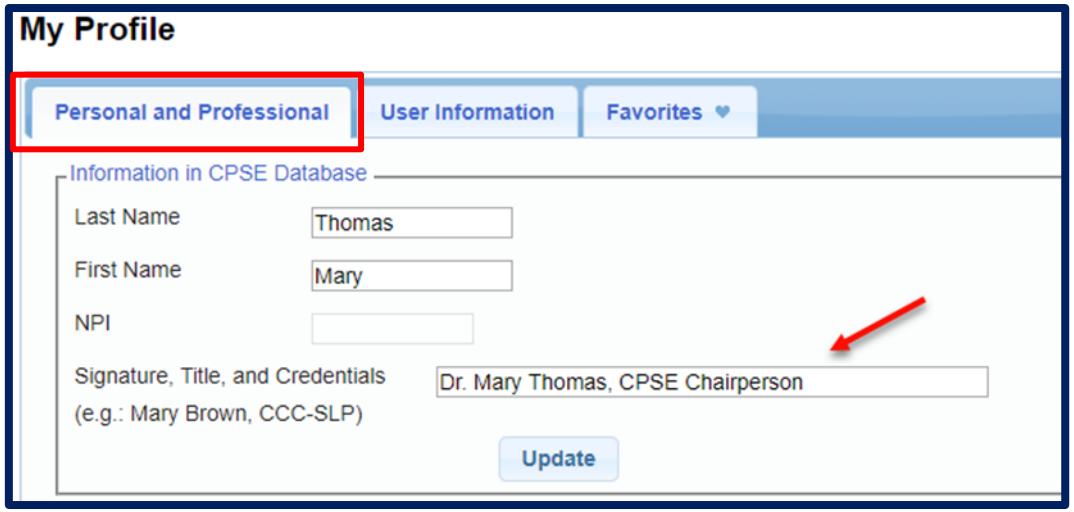
* Go to ***My Account -> User Account Details***
* Use the User Account Details page to enter / edit your Last name and First name for your account.
* Click "*Update*" to save the changes



Step 2 - Digital 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.



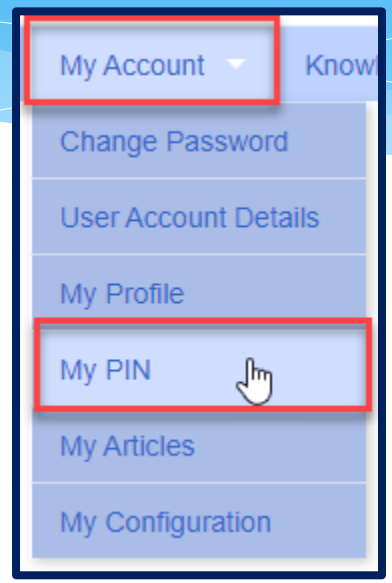


For help, email: eSTACs@CPSEPortal.com

Step 3 – Creating Your Pin for Digital Signatures

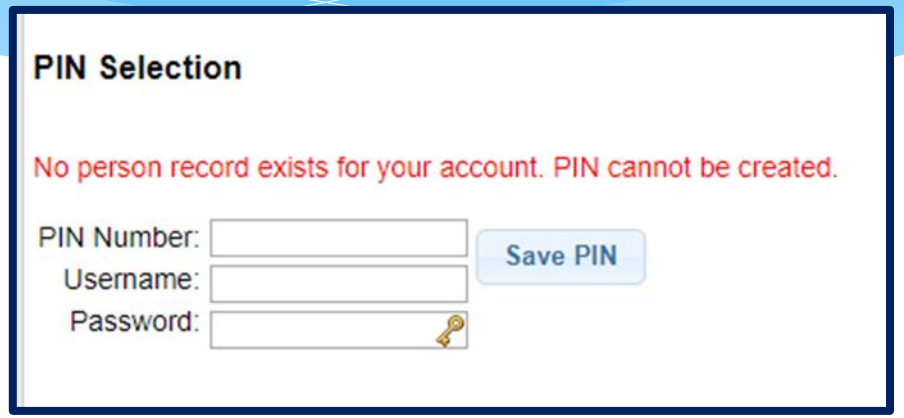
* Go to ***My Account -> My PIN***

* 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*".

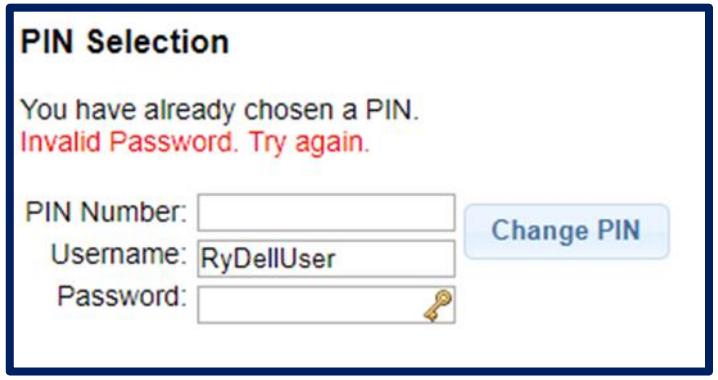


Digital Signature – Creating PIN Problems

* 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.

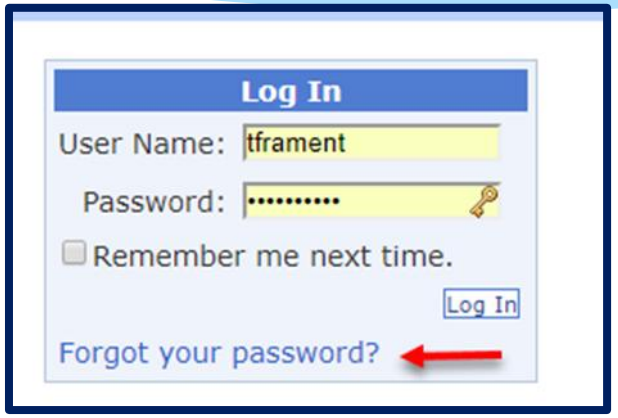


* The message "**Invalid Password. Try Again**" indicates that what you are entering into "Password" field is not the correct password that you use to log into CPSE Portal. Make sure that you are not entering your PIN a second time in the Password field.



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.



For help, email: eSTACs@CPSEPortal.com

Forgotten Usernames

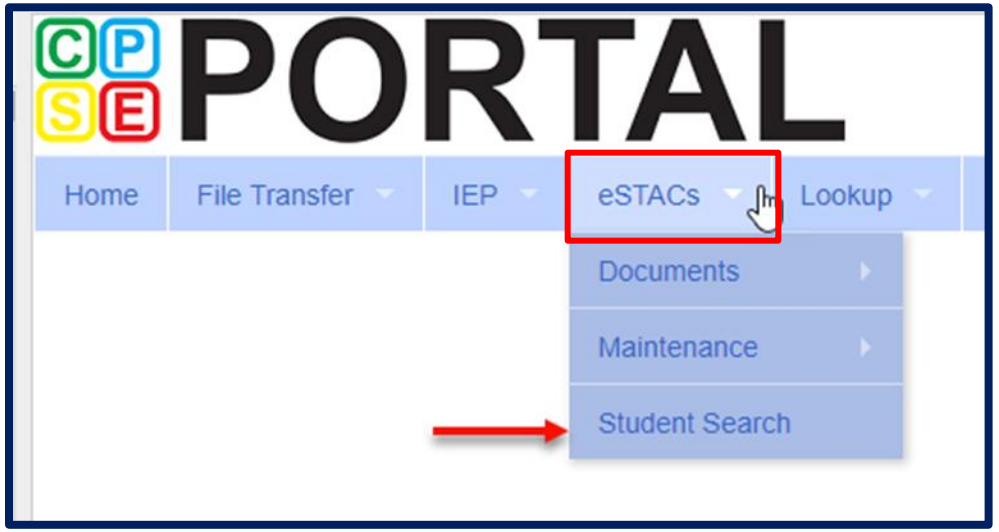
* Any district user (or County user) can use the district users screen to view all the users and see what their username is.

* Go to ***People -> District Users***

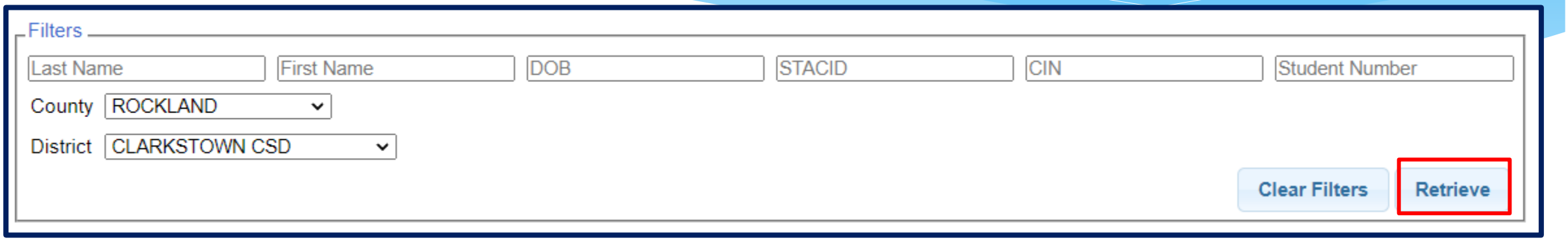
eSTACs Entering Children

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

Filters

Last Name | First Name | DOB | STACID | CIN | Student Number

County WESTCHESTER

District RYDELL CSD

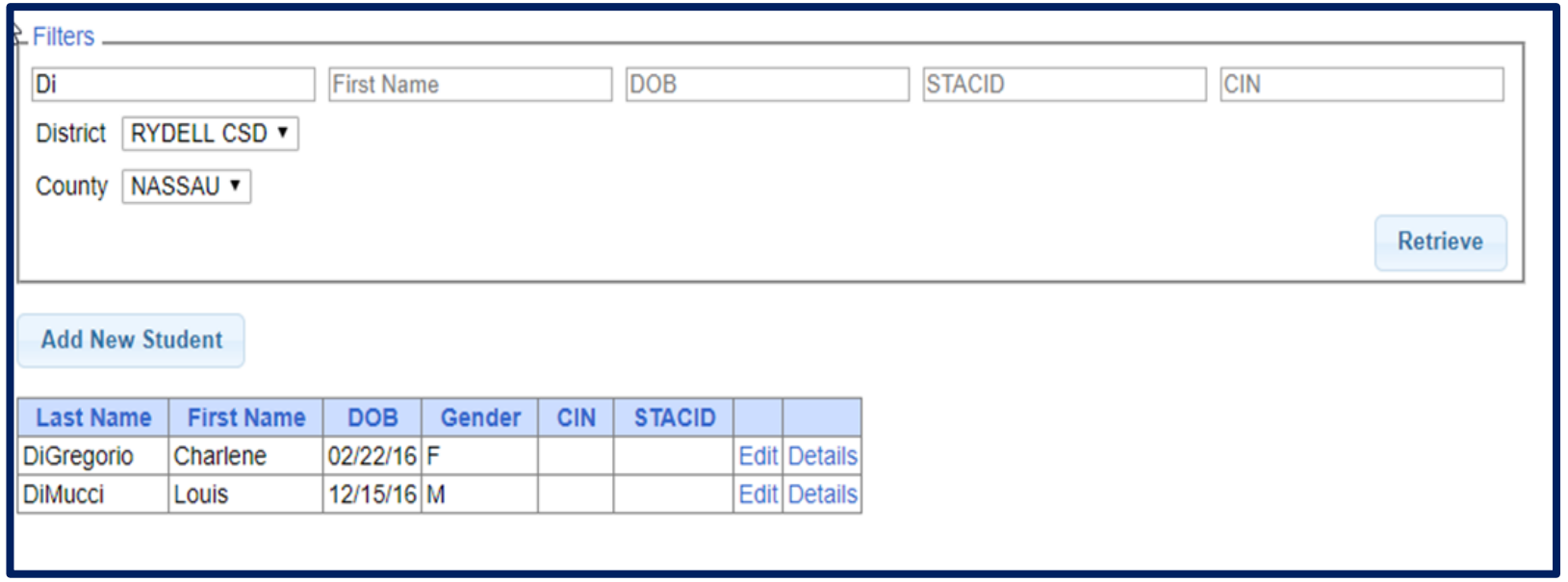
Clear Filters | Retrieve

Add New Student

Last Name	First Name	DOB	Gender	CIN	STACID	Student Number			
Balmudo	Leo	03/19/16	M			6600019969	Edit	Details	Delete
Carrington	Michael	04/04/16	M			6600019981	Edit	Details	Delete
Chisum	Tom	12/31/16	M			6600019967	Edit	Details	Delete
DelFuego	Anthony	03/12/16	M			6600019973	Edit	Details	Delete
DiGregorio	Charlene	02/22/16	F			6600019968	Edit	Details	Delete
DiMucci	Louis	12/15/16	M			6600019980	Edit	Details	Delete
Facciano	Franchesca	09/09/16	F			6600019971	Edit	Details	Delete
Jaworski	David	05/18/16	M			6600019972	Edit	Details	Delete
LaTierri	Sonny	08/13/16	M			6600019965	Edit	Details	Delete
Maraschino	Marty	07/22/16	F			6600019966	Edit	Details	Delete
McKenzie	Bradley	12/05/16	M			6600019974	Edit	Details	Delete
Misner	Martin	11/11/16	M			6600019978	Edit	Details	Delete
Murdoch	Kenickie	10/10/16	M			6600019970	Edit	Details	Delete
Nogerelli	John	06/14/16	M			6600019975	Edit	Details	Delete
Rebchuck	Paulette	08/22/16	F			6600019977	Edit	Details	Delete
Rizzo	Betty	09/09/16	F			6600019964	Edit	Details	Delete
Willard	Willie	05/11/16	M			6600019979	Edit	Details	Delete
Zinone	Stephanie	01/21/16	F			6600019976	Edit	Details	Delete

Student Search – Partial Name

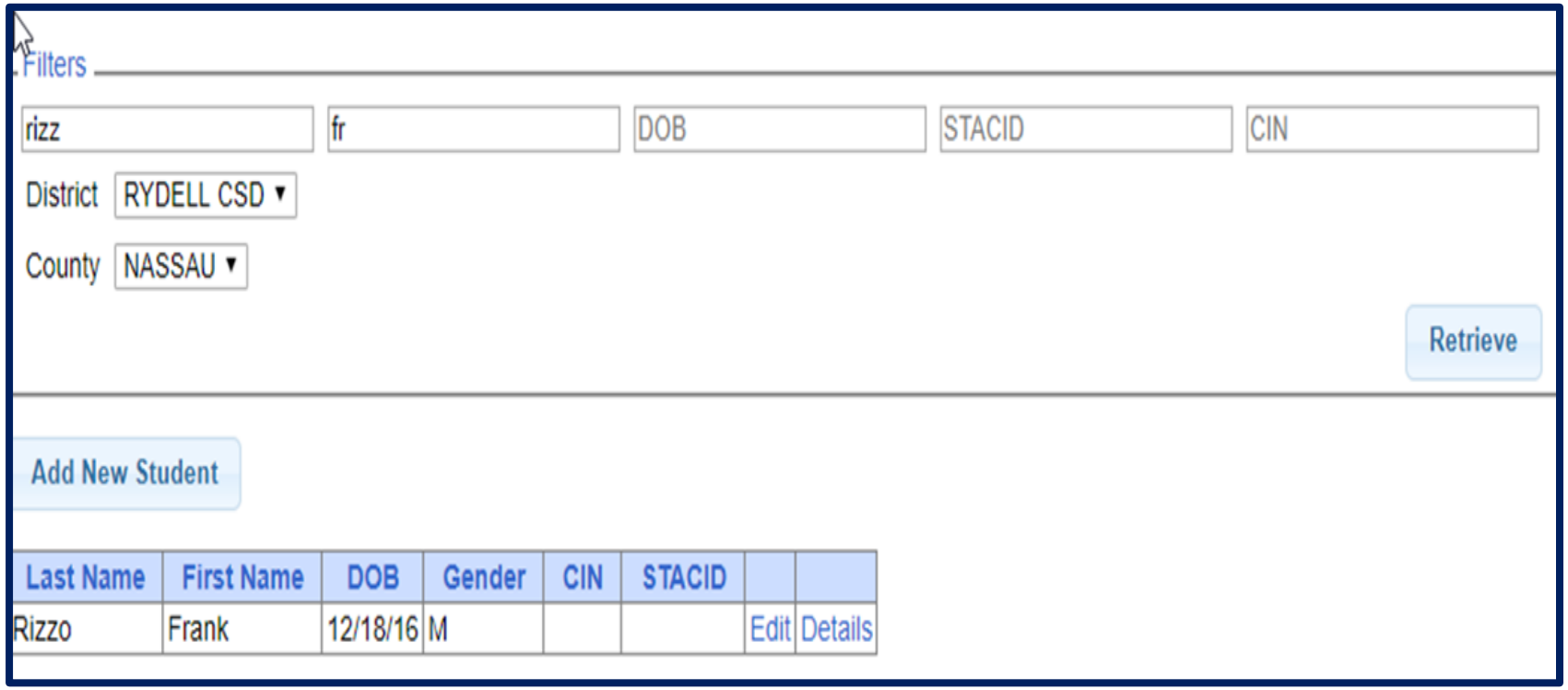
* For the first and last name you can enter the first few letters and search to find all students that name start with those letters.



Last Name	First Name	DOB	Gender	CIN	STACID		
DiGregorio	Charlene	02/22/16	F			Edit	Details
DiMucci	Louis	12/15/16	M			Edit	Details

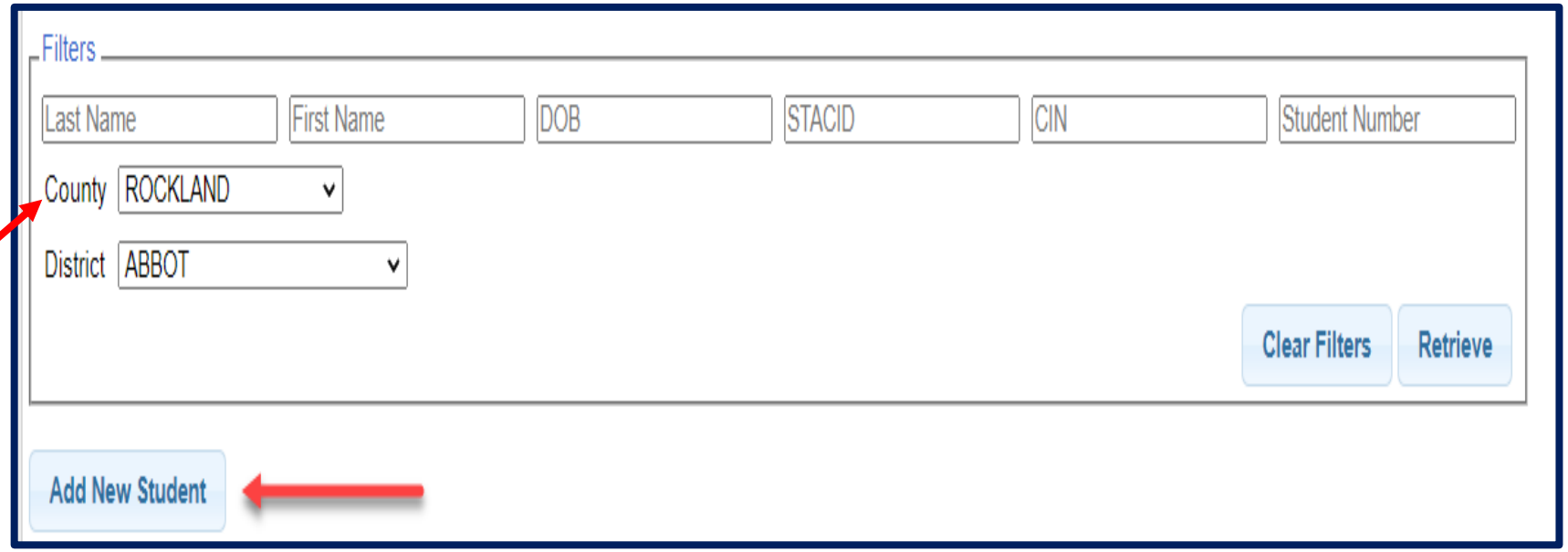
Student Search – Multiple Fields

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



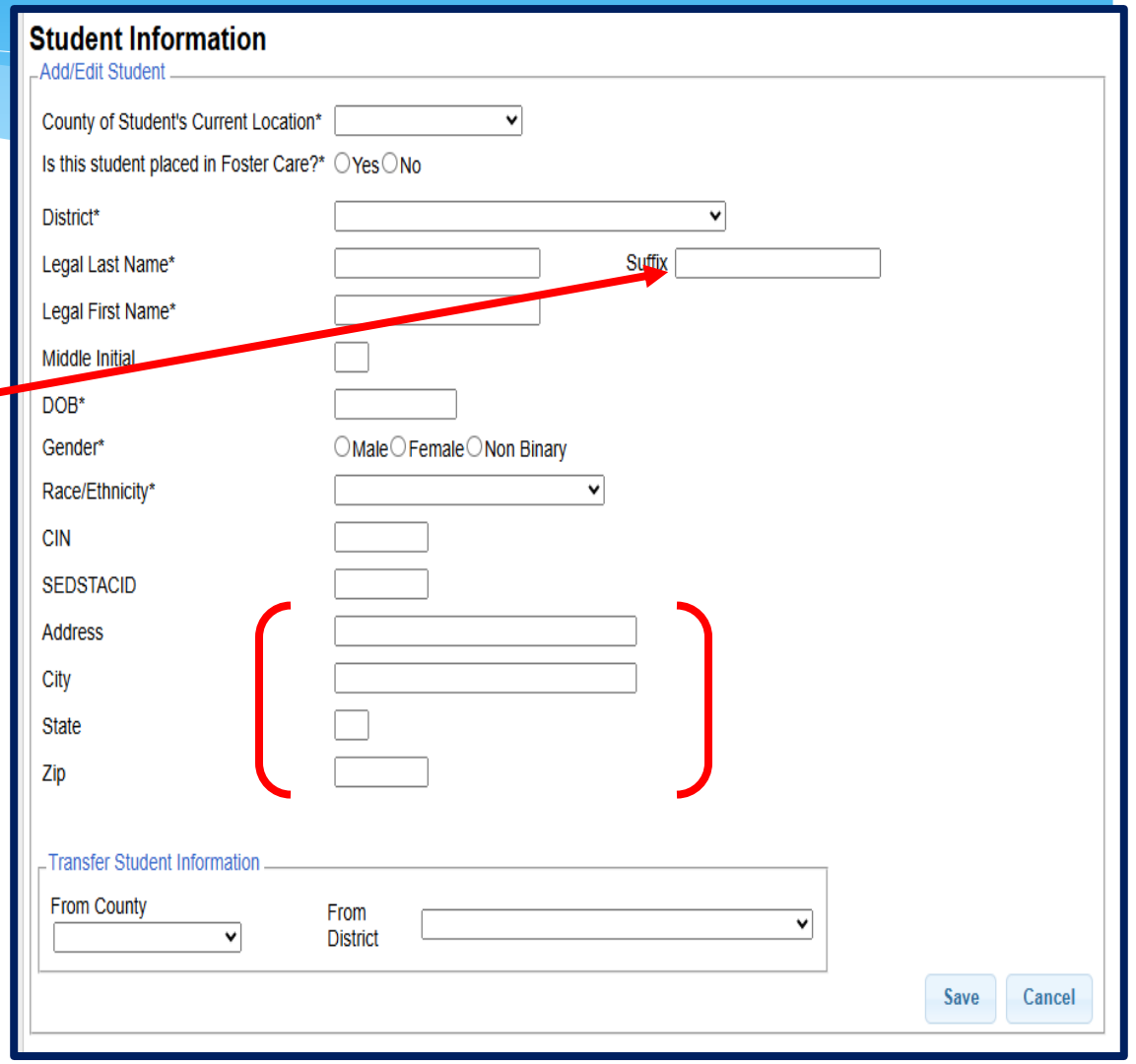
Adding a Student

* Go to the Student Search screen.
* Verify student is not already in system. This is very important so you do not create duplicate children.
* If you are a district in 2 or more counties, make sure you are choosing the correct county.
* Click on "*Add New Student*" button.



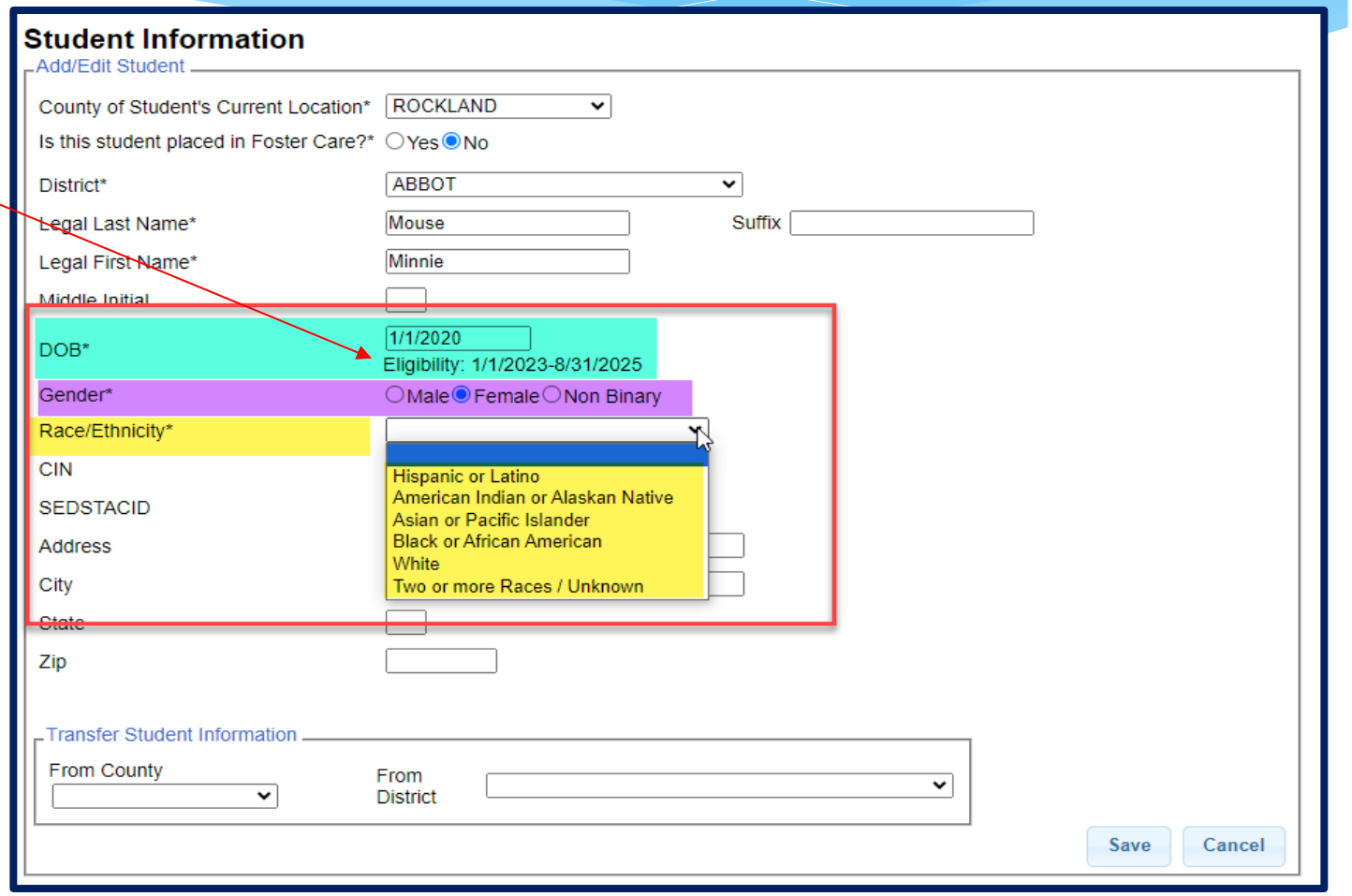
Student Information

* Field with an asterisk (*) next to their label are required in order to save the child.
* 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.
* Most counties **require** the address of the child to be entered.
* Other fields should be entered if the information is known.



Student Information

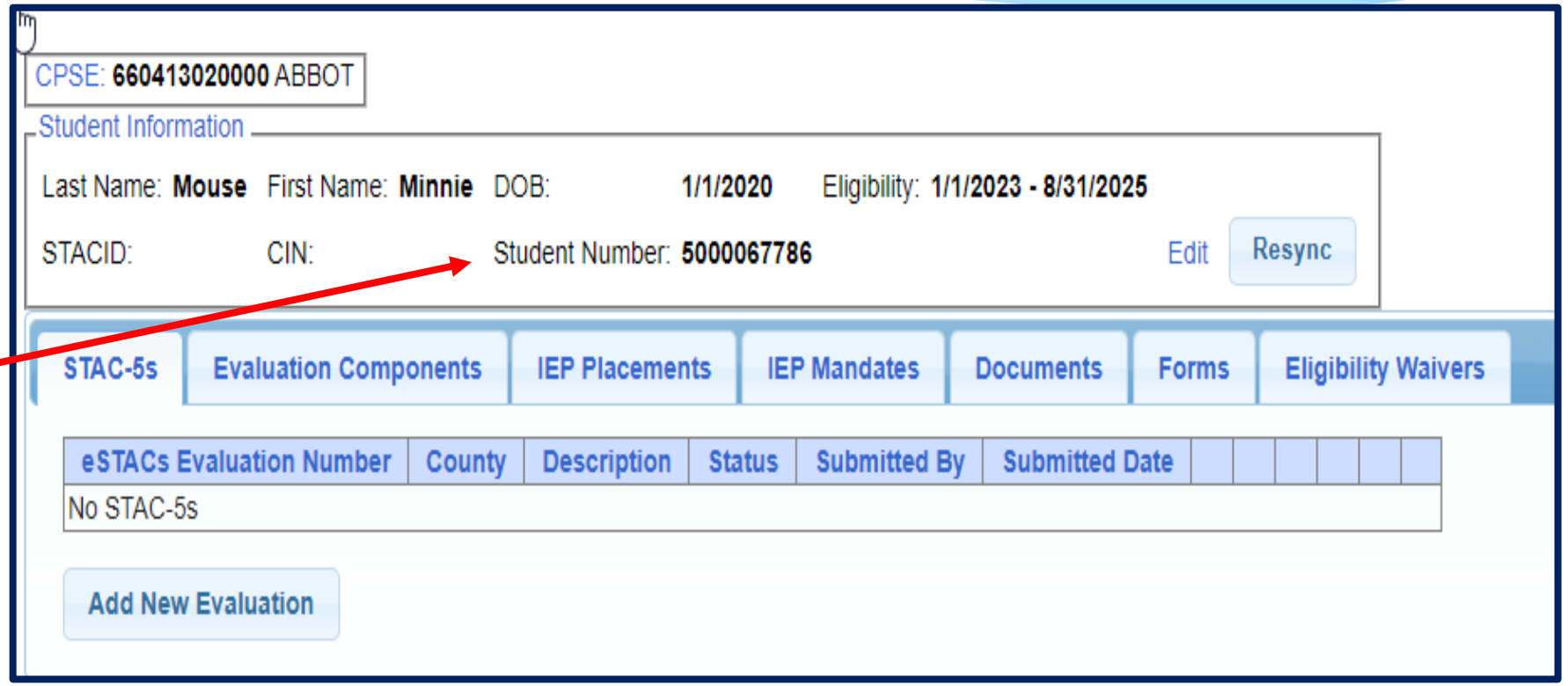
* When you enter the child's DOB, the child's dates of eligibility will populate based on the child's DOB.
* Gender contains "Non Binary" if needed.
* Race/Ethnicity field contains "Two or more Races / Unknown" if you do not know the race.



Student Details

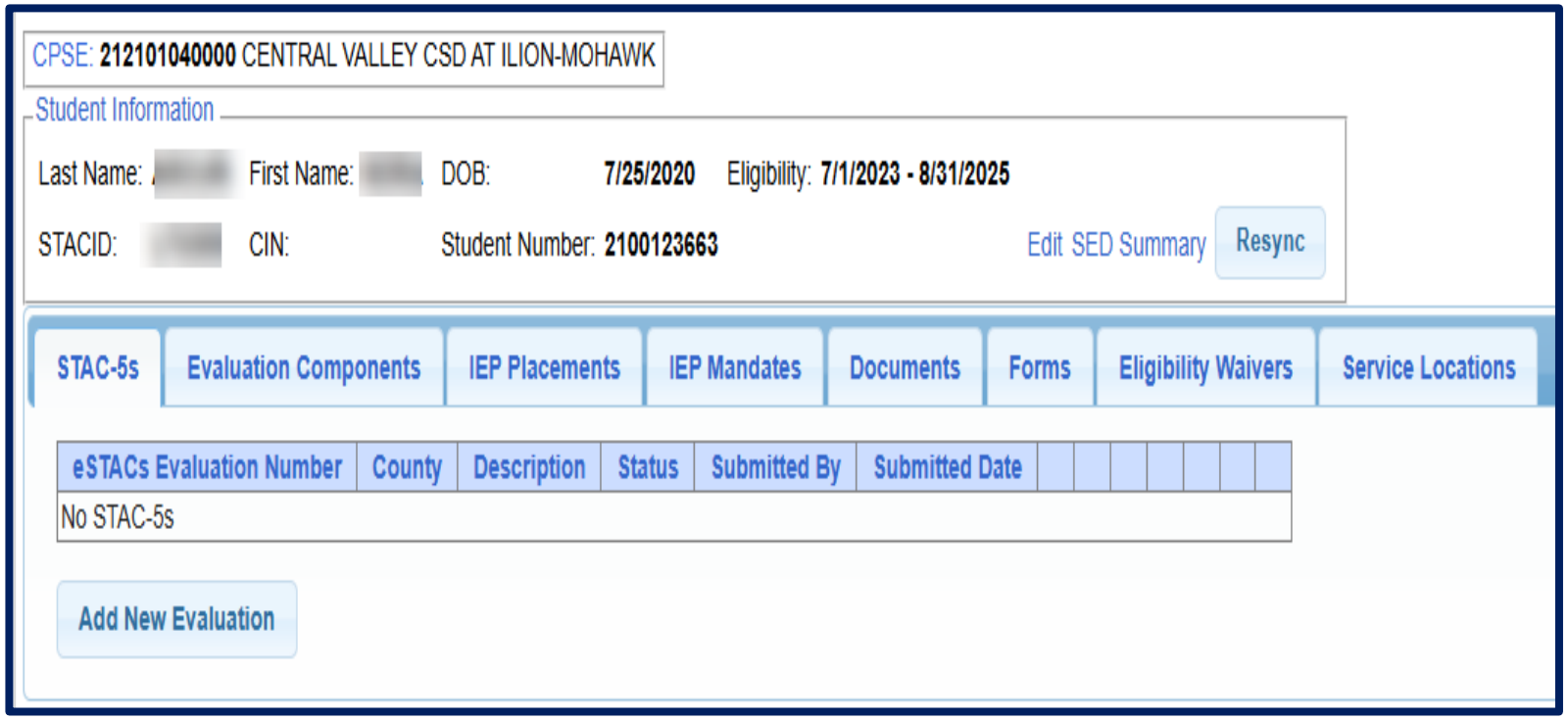
* Upon saving a new student, the system will take you to the student details page.

* Once student is created, each child is given a Student Number.



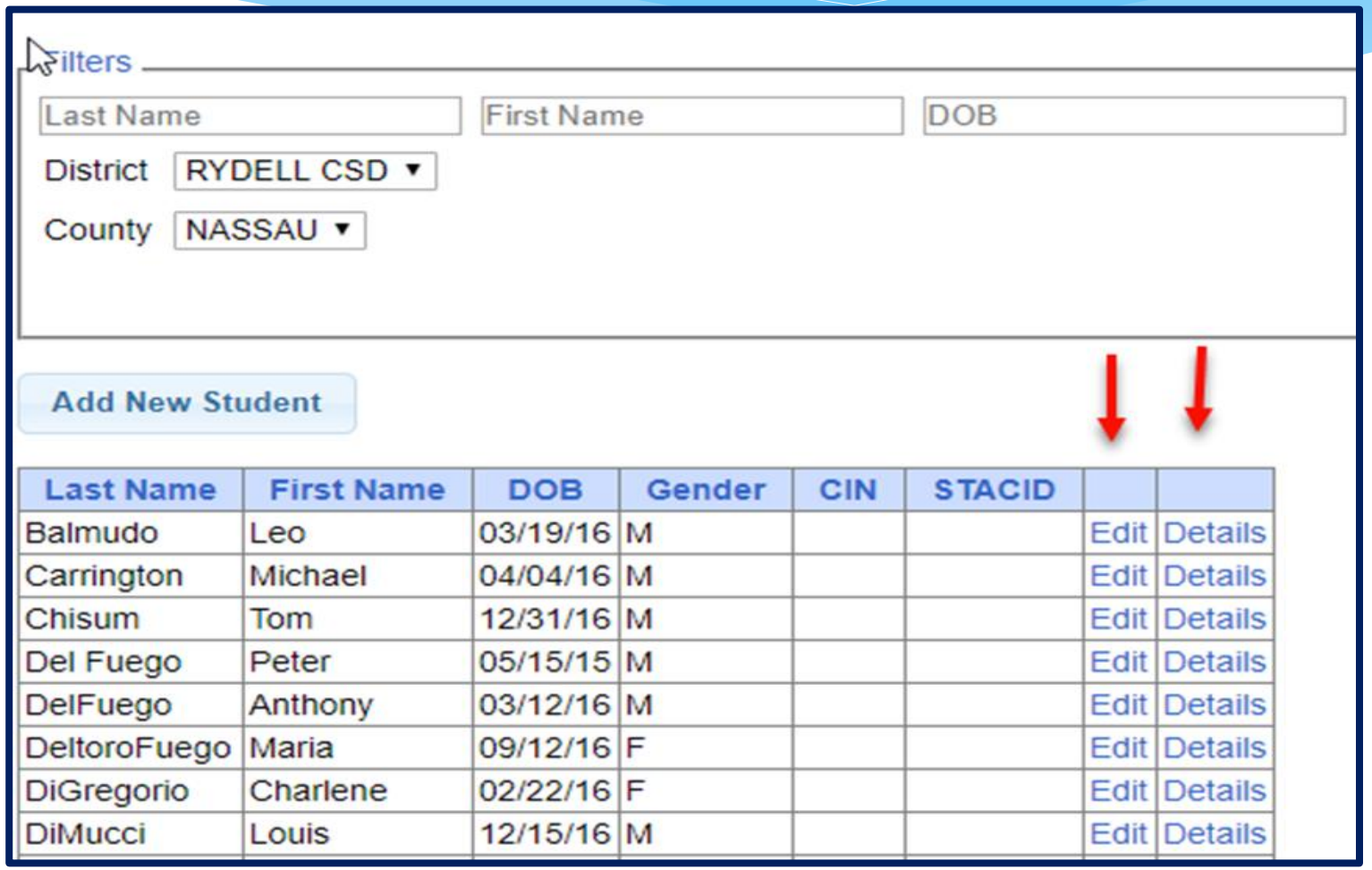
Student Details

* 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
  * Service Locations



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.



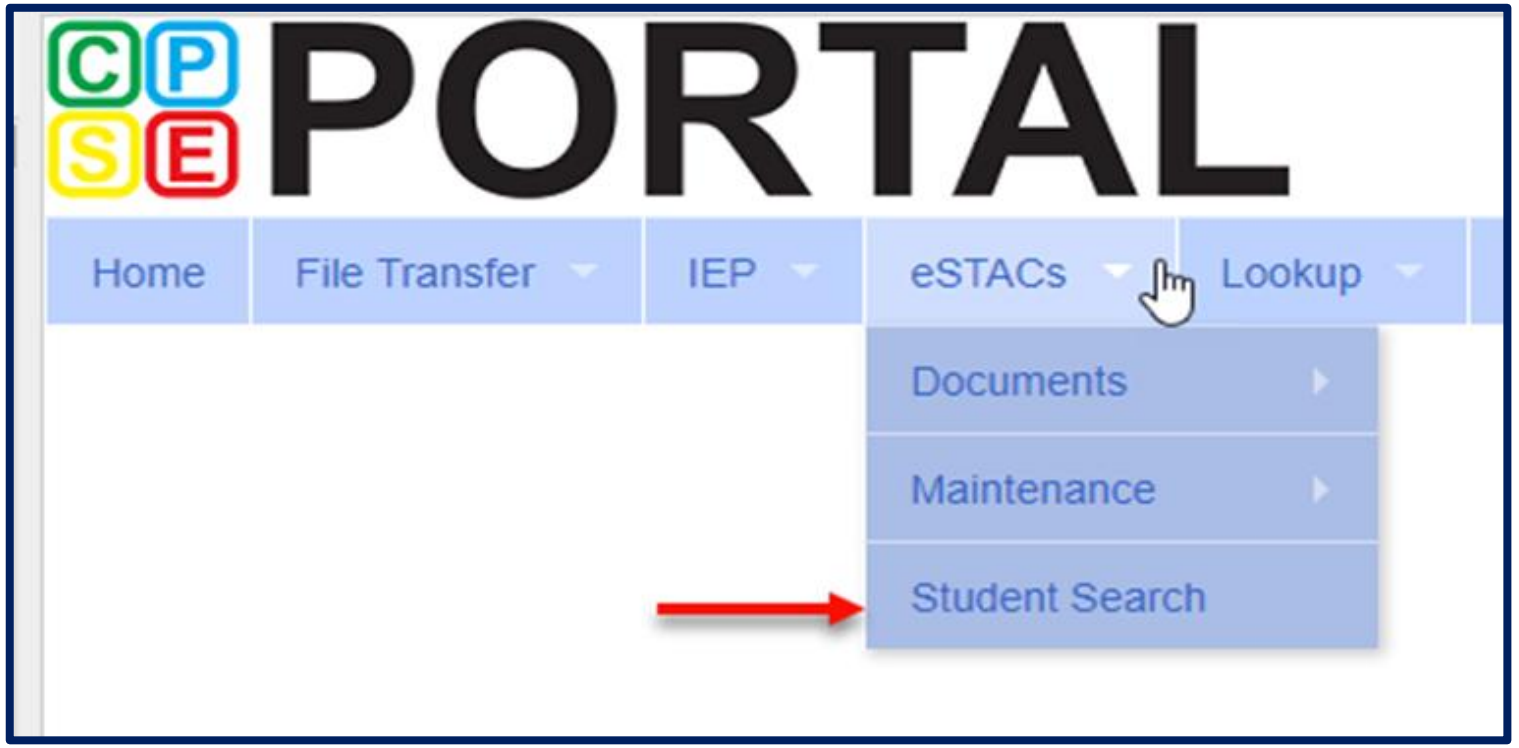
Last Name	First Name	DOB	Gender	CIN	STACID		
Balmudo	Leo	03/19/16	M			Edit	Details
Carrington	Michael	04/04/16	M			Edit	Details
Chisum	Tom	12/31/16	M			Edit	Details
Del Fuego	Peter	05/15/15	M			Edit	Details
DelFuego	Anthony	03/12/16	M			Edit	Details
DeltoroFuego	Maria	09/12/16	F			Edit	Details
DiGregorio	Charlene	02/22/16	F			Edit	Details
DiMucci	Louis	12/15/16	M			Edit	Details

For help, email: eSTACs@CPSEPortal.com

eSTACs Entering STAC-5

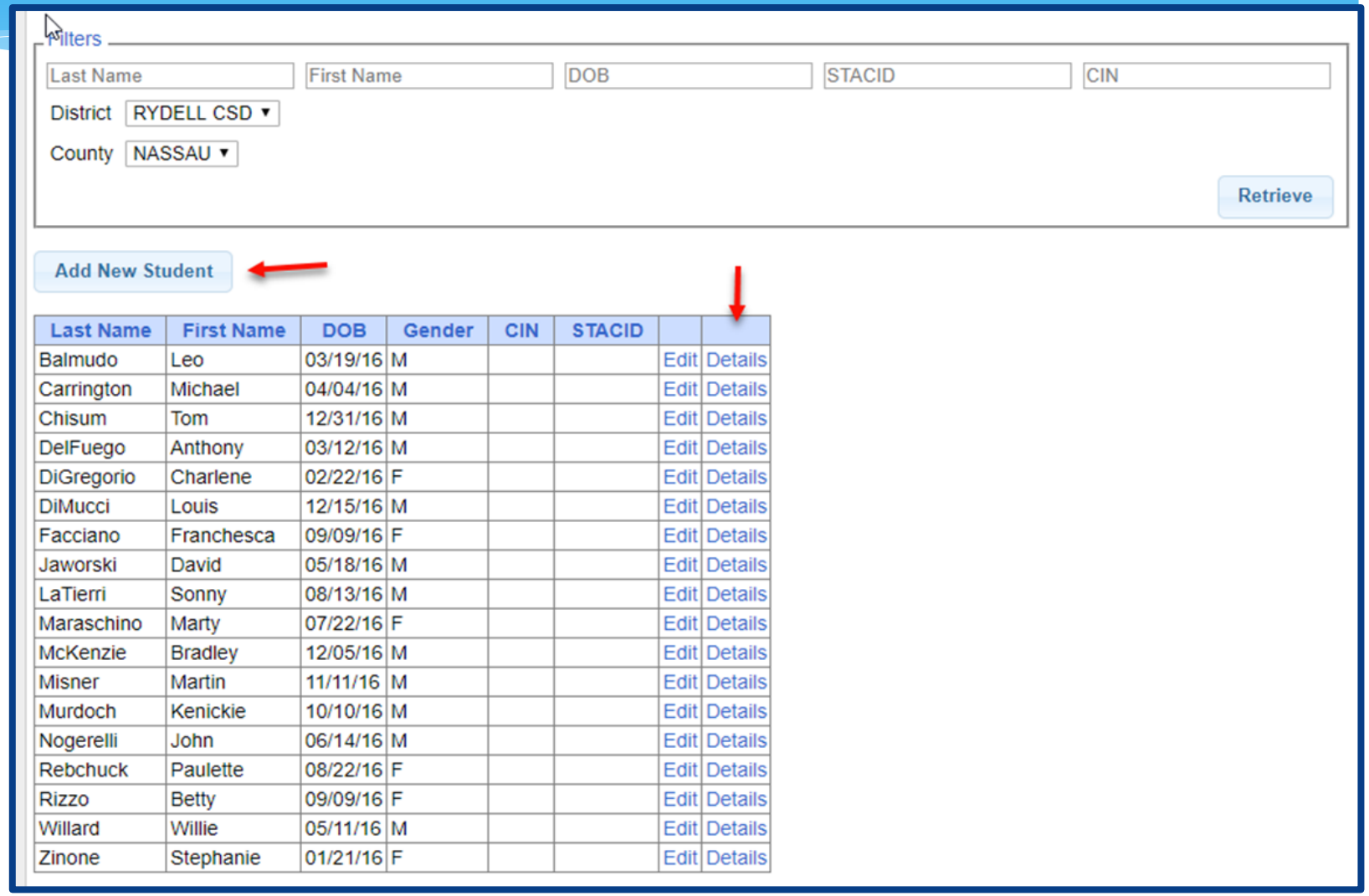
eSTACs Student Search

* Go to ***eSTACs -> Student Search***



Student Search for Student Details

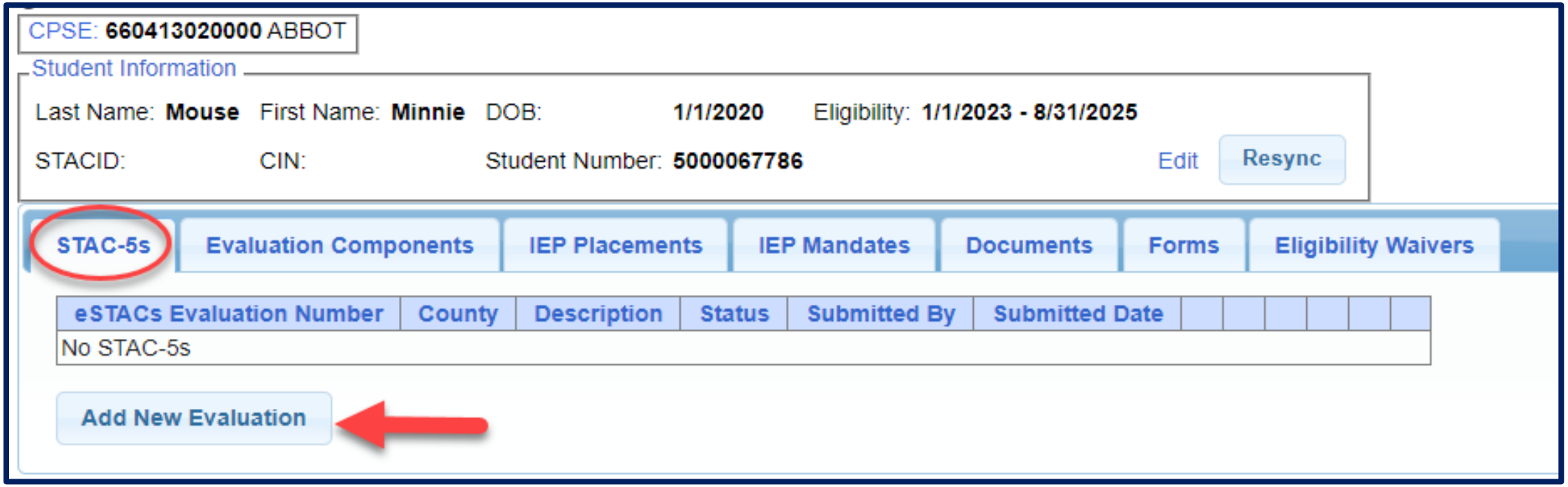
- Always search for the student first.
- If student is already in system, click the "***Details***" link for that student.
- If student does not exist, click "***Add New Student***".



Last Name	First Name	DOB	Gender	CIN	STACID		
Balmudo	Leo	03/19/16	M			Edit	Details
Carrington	Michael	04/04/16	M			Edit	Details
Chisum	Tom	12/31/16	M			Edit	Details
DelFuego	Anthony	03/12/16	M			Edit	Details
DiGregorio	Charlene	02/22/16	F			Edit	Details
DiMucci	Louis	12/15/16	M			Edit	Details
Facciano	Franchesca	09/09/16	F			Edit	Details
Jaworski	David	05/18/16	M			Edit	Details
LaTierri	Sonny	08/13/16	M			Edit	Details
Maraschino	Marty	07/22/16	F			Edit	Details
McKenzie	Bradley	12/05/16	M			Edit	Details
Misner	Martin	11/11/16	M			Edit	Details
Murdoch	Kenickie	10/10/16	M			Edit	Details
Nogerelli	John	06/14/16	M			Edit	Details
Rebchuck	Paulette	08/22/16	F			Edit	Details
Rizzo	Betty	09/09/16	F			Edit	Details
Willard	Willie	05/11/16	M			Edit	Details
Zinone	Stephanie	01/21/16	F			Edit	Details

Adding a New Evaluation

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



eSTACs vs Paper STAC-5

Evaluation Info

County* WESTCHESTER 2

School Year* 2020 - 2021

Provider* 1

Is this student placed in Foster Care?* Yes No

County at time of placement* 2

Child is: Preschool Student With a Disability Non-Disabled 4

Translation Cost 5

This student is eligible for evaluations from **09/01/2018** to **07/31/2021**

Evaluation	Component	Eval Date	Bilingual		
Social	SOC				
Psychological	PSY				
Speech/Language	SPT				
Physical Therapy	PHT				
Occupational Therapy	OCT				
Physical/Medical	PHY				
Education	EDU				6
Audiological	AUD				
Other Physician	OTH				
Other Non-Physician	OTH				
Psychiatric	PYC				
Neurological	NEU				
Optometric	OPT				
Orthopedic	ORT				
Counseling	CSL				
Functional Vision	FUV				
Teacher of Visually Impaired	TVI				
Neuropsychological	NPY				

STAC-5

The University of the State of New York
THE STATE EDUCATION DEPARTMENT
STAC and Medicaid Unit

Rev. 8/2017

Request for Commissioner's Approval of Reimbursement for the Cost of Evaluations

STAC-ID

List the date each evaluation component was completed (use four digits to indicate month and year). For bilingual evaluations indicate on line provided.

STUDENT INFORMATION

Last Name | First Name | Middle Initial

Date of Birth (mm/dd/yy) | Student Identification Number *(if applicable)* | Gender ☐ Female ☐ Male

DISABILITY

The child named above is:

☐ PD - Preschool Student With a Disability

☐ ND - Non-Disabled

4

RACIAL ETHNIC CATEGORY OF STUDENT

☐ Hispanic or Latino

Not of Hispanic Origin:

☐ American Indian or Alaskan Native
☐ Asian or Pacific Islander
☐ Black or African American
☐ Native Hawaiian or other Pacific Islander
☐ White
☐ Two or more Races

(see explanation on second page)

School District with CPSE Responsibility | CPSE District SED (BEDS) Code

County of Child's Current Location (where child resides) 2

County at time of Placement in Foster Care 3

Approved Evaluator 1

EVALUATION COMPONENT		MONTH / YEAR	CHECK IF BILINGUAL
Audiological	AUD	____/____	6
Counseling	CSL	____/____	
Education	EDU	____/____	
Functional Vision	FUV	____/____	
Music	MUS	____/____	
Neurological	NEU	____/____	
Neuropsychological	NPY	____/____	
Occupational Therapy	OCT	____/____	
Optometric (visual)	OPT	____/____	
Orthopedic	ORT	____/____	
Physical/Medical	PHY	____/____	
Physical Therapy	PHT	____/____	
Psychiatric	PYC	____/____	
Psychological	PSY	____/____	
Social	SOC	____/____	
Speech / Language	SPT	____/____	
Teacher of Visually Impaired	TVI	____/____	
Other: _____		____/____	

Cost of translation/transmittal of evaluation documentation or summary report for monolingual evaluations only. $ 5

PERSON COMPLETING THIS FORM

Name | Title

Phone | Email

CERTIFICATION OF EVALUATION: I certify that the preschool child herein named received a multidisciplinary evaluation as indicated above and in accordance with Section 4410 of the Education Law and the Regulations of the Commissioner of Education.

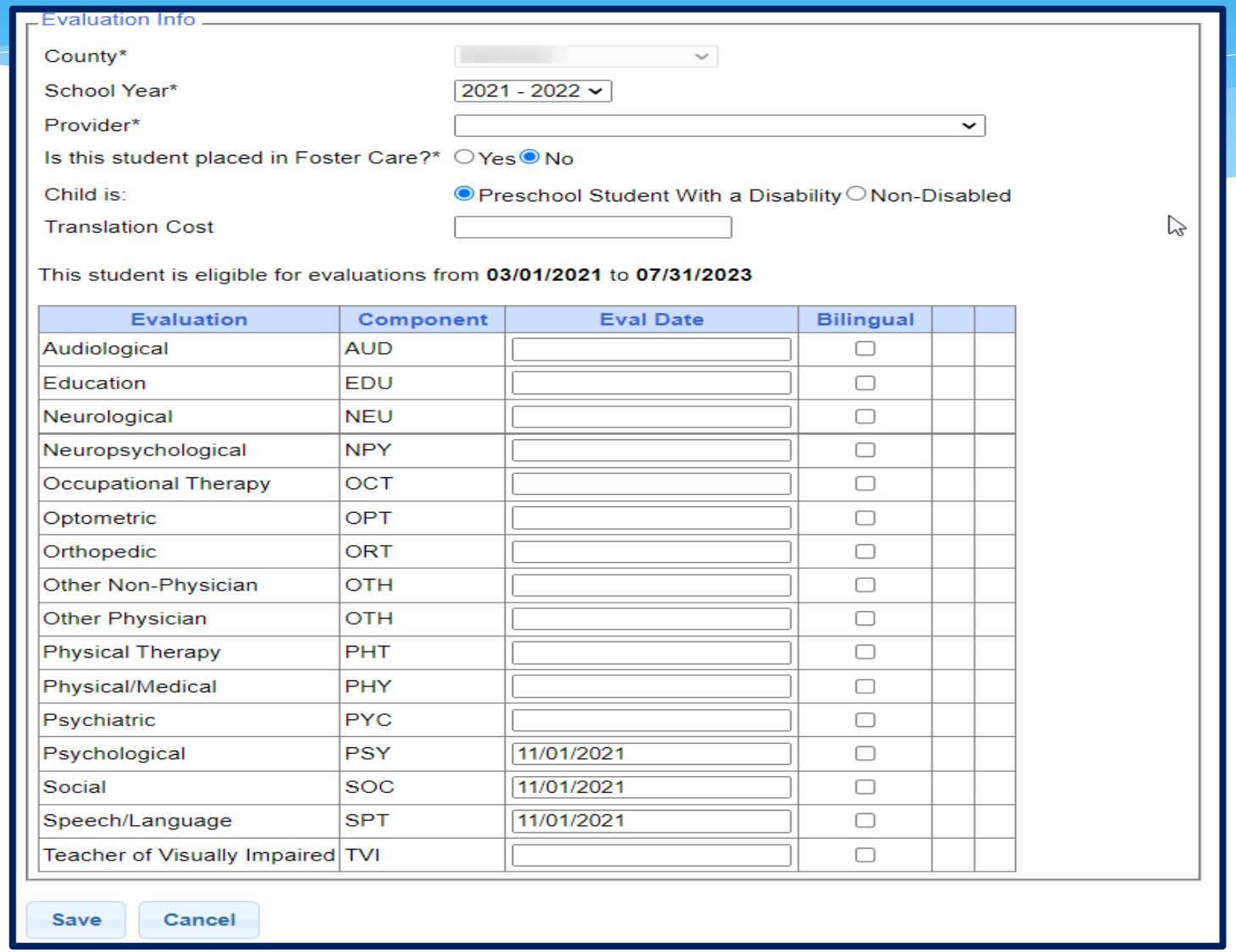
Signature CPSE Chairperson 7 Date ___/___/____

MUNCIPALITY: The municipality of _____ has received on ___/___/____ the STAC-5 Request for Commissioner's Approval of Reimbursement for the Cost of Evaluations for the above named child pursuant to Section 4410 of the Education Law.

Signature of Authorized Representative of the Municipality _____ Date ___/___/____

Complete Fields Related to Evaluation

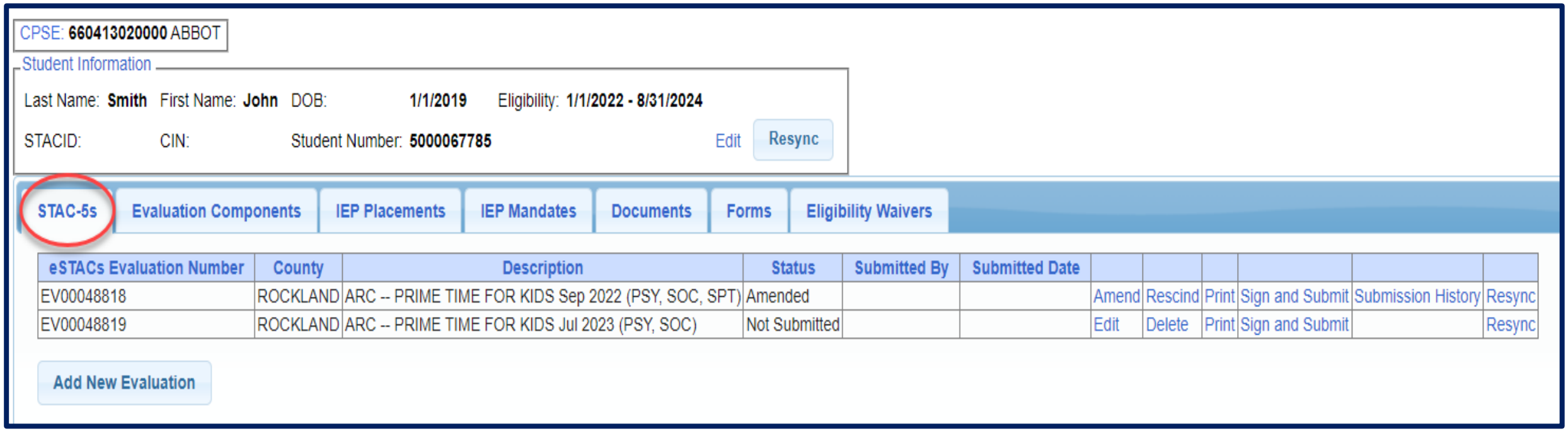
- Enter information regarding evaluation.
- Enter the exact evaluation dates.
- If evaluation is Bilingual then checkoff the Bilingual checkbox.
- All fields labeled with an asterisk (*) must be filled in to save.



For help, email: eSTACs@CPSEPortal.com

Evaluations – STAC-5 Tab

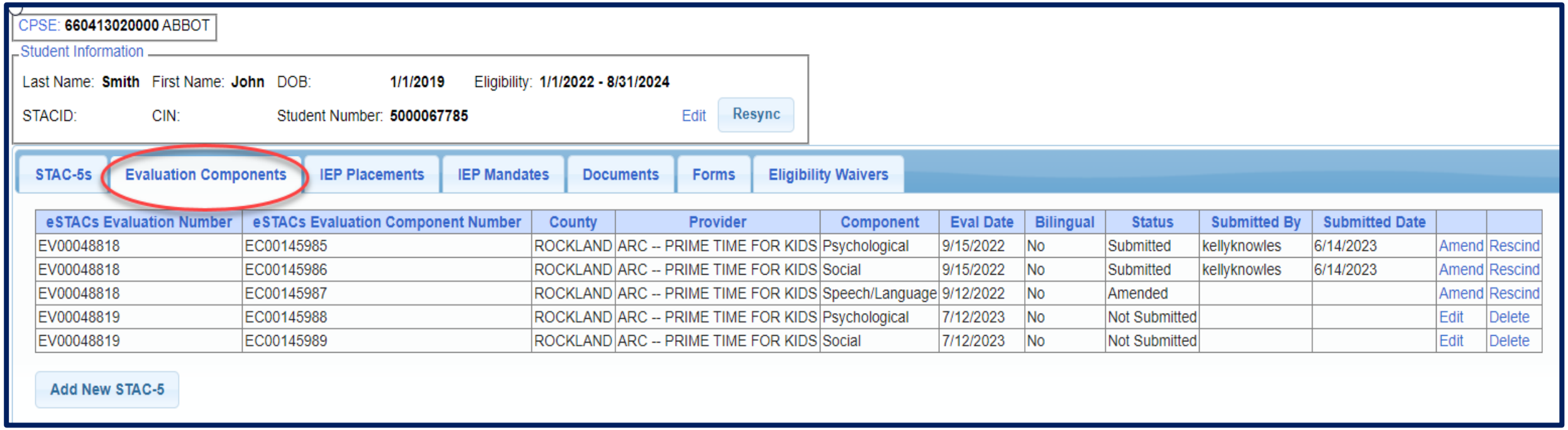
* There are two tabs for Evaluations:
* **STAC-5s Tab** - shows one line per STAC-5 group of components.



For help, email: eSTACs@CPSEPortal.com

Evaluation Components Tab

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



CPSE: **660413020000** ABBOT

Student Information

Last Name: **Smith** First Name: **John** DOB: **1/1/2019** Eligibility: **1/1/2022 - 8/31/2024**

STACID: CIN: Student Number: **5000067785** Edit Resync

STAC-5s | Evaluation Components | IEP Placements | IEP Mandates | Documents | Forms | Eligibility Waivers

eSTACs Evaluation Number	eSTACs Evaluation Component Number	County	Provider	Component	Eval Date	Bilingual	Status	Submitted By	Submitted Date		
EV00048818	EC00145985	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Psychological	9/15/2022	No	Submitted	kellyknowles	6/14/2023	Amend	Rescind
EV00048818	EC00145986	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Social	9/15/2022	No	Submitted	kellyknowles	6/14/2023	Amend	Rescind
EV00048818	EC00145987	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Speech/Language	9/12/2022	No	Amended			Amend	Rescind
EV00048819	EC00145988	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Psychological	7/12/2023	No	Not Submitted			Edit	Delete
EV00048819	EC00145989	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Social	7/12/2023	No	Not Submitted			Edit	Delete

Add New STAC-5

Evaluations Crossing Over School Years

* If you have evaluations and:
  * One evaluation was completed in the **24/25** SY – then that evaluation will need to be entered under the 24/25 SY.
  * If other evaluations are for July 1, 2025 dates and forward – then enter those evaluations are entered the 25/26 SY.
  * If you try to enter evaluations for same student with different years, you will get an error.
* You **cannot** combine evaluations for different school years.

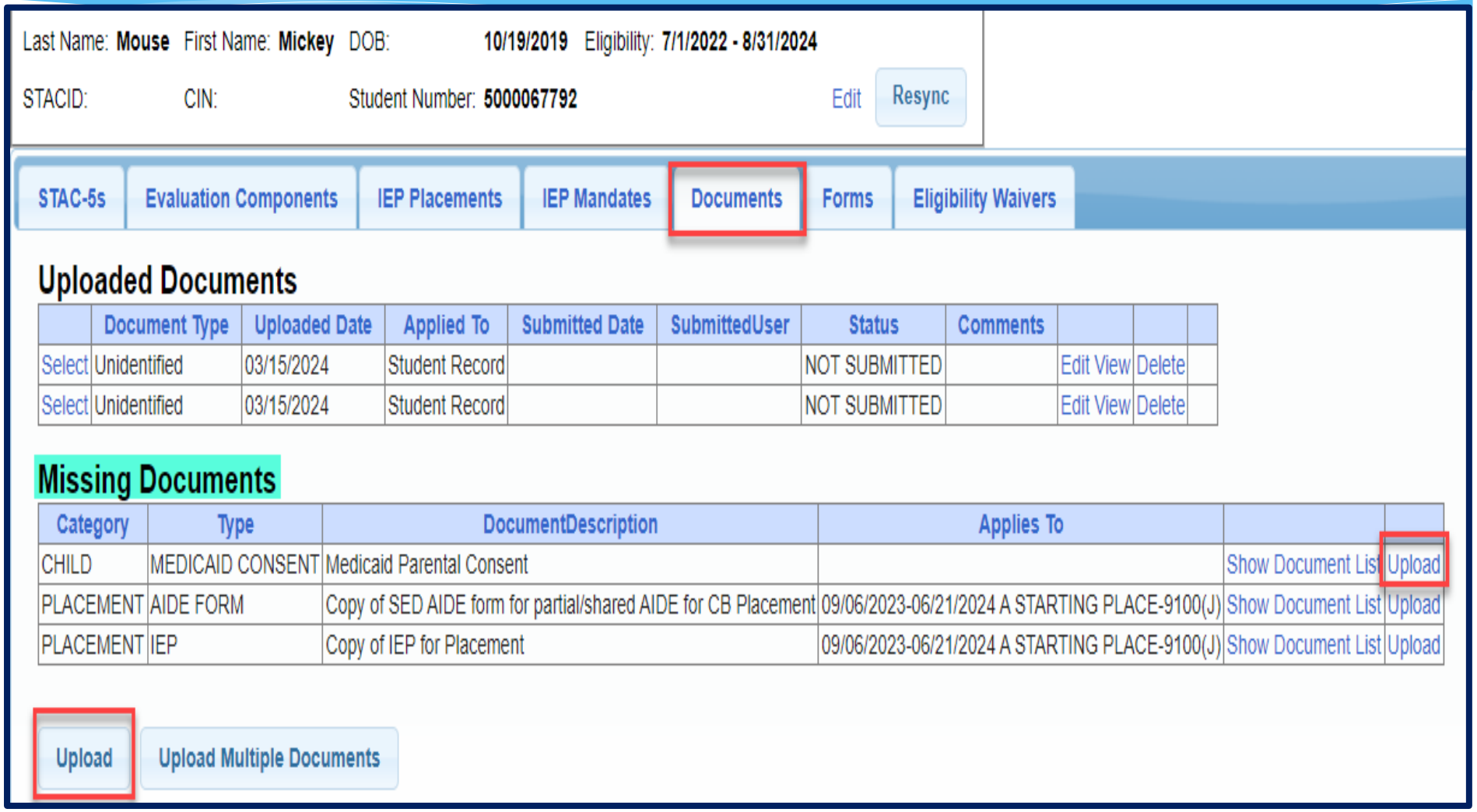
eSTACs Uploading Documents

Documents Required for Evaluations –

* Each county decides what documents need to be uploaded before you can sign and submit your STAC-5. Check with your county to see what their requirements are.
* Below are some documents that may be required.
  * **A Medicaid Parental Consent:**
    * A signed Medicaid Parental Consent or an Unable to Obtain Medicaid Consent.
  * **A Consent to Evaluate.**
  * **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.

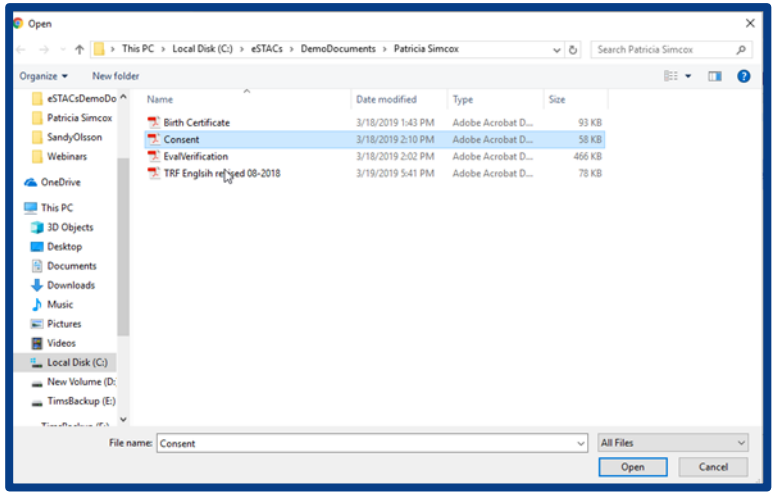
Uploading a Document

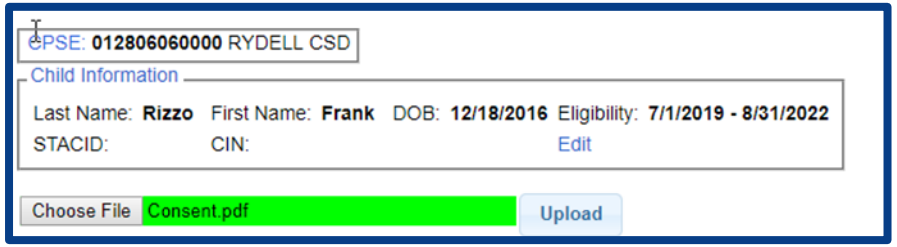
* Select the Documents tab on Student Details screen.
* This will also show any Missing *Documents* that need to be uploaded.
* Click "*Upload*" button at bottom of screen or "*Upload*" at the end of the missing document line.



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*".

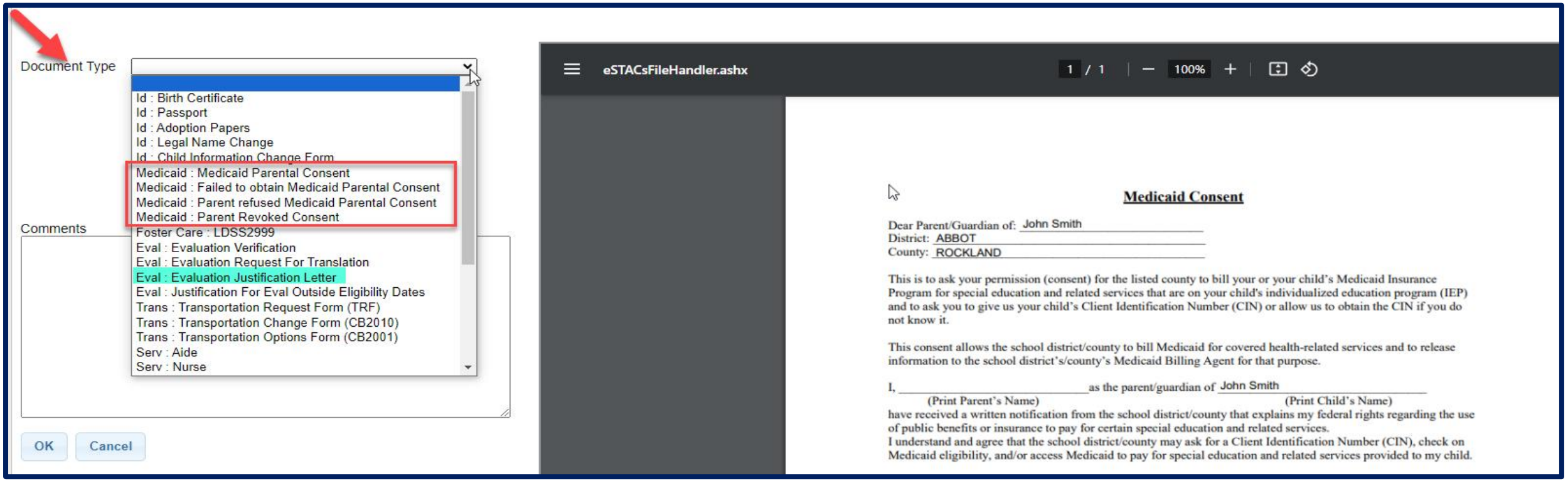




For help, email: eSTACs@CPSEPortal.com

Indicate Document Type

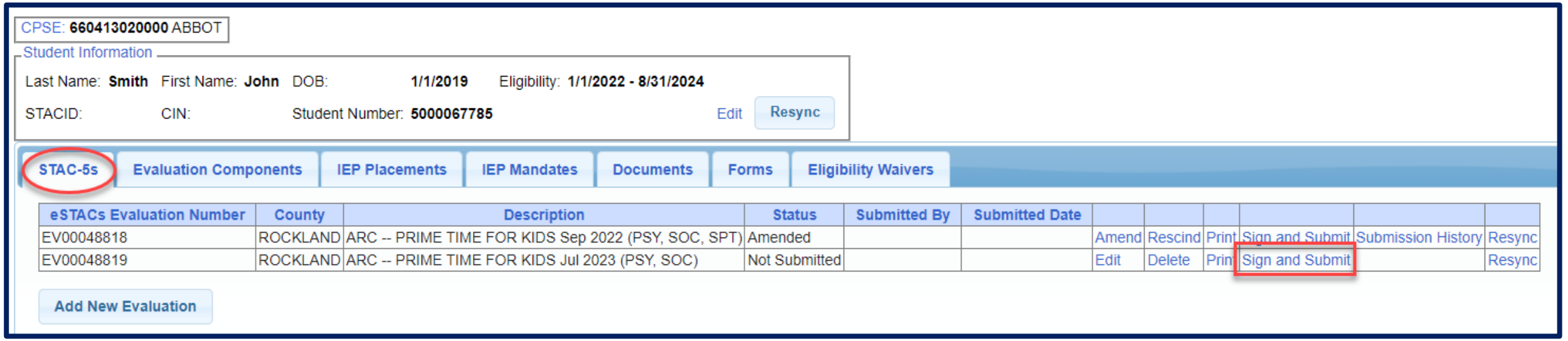
* Right hand side shows the document.
* Left hand side shows fields to specify what type of document it is, as well as other related fields specific to the type of document.



eSTACs Sign and Submit Evaluations

Sign and Submit Evaluation – Signing Per Student

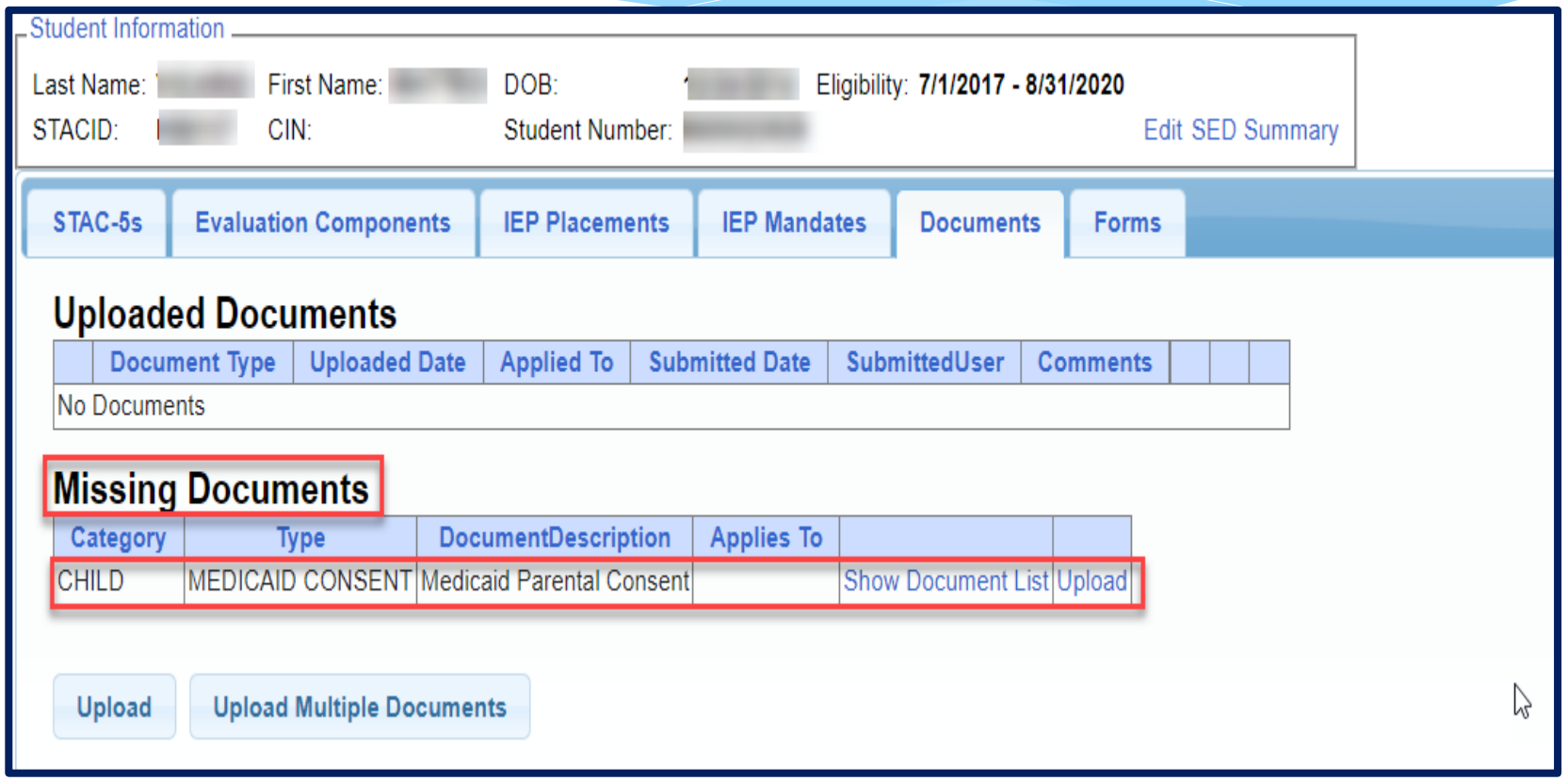
* Once all documents have been uploaded, you can now "*Sign and Submit*" the STAC-5.
* The Status, Submitted By & Submitted Date columns will now show a status of submitted, who submitted the STAC-5, and the date submitted.
* This will now be sent to the county for review.



For help, email: eSTACs@CPSEPortal.com

Submitting Evaluations
Error Messages – Missing Document(s)

* If all 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.



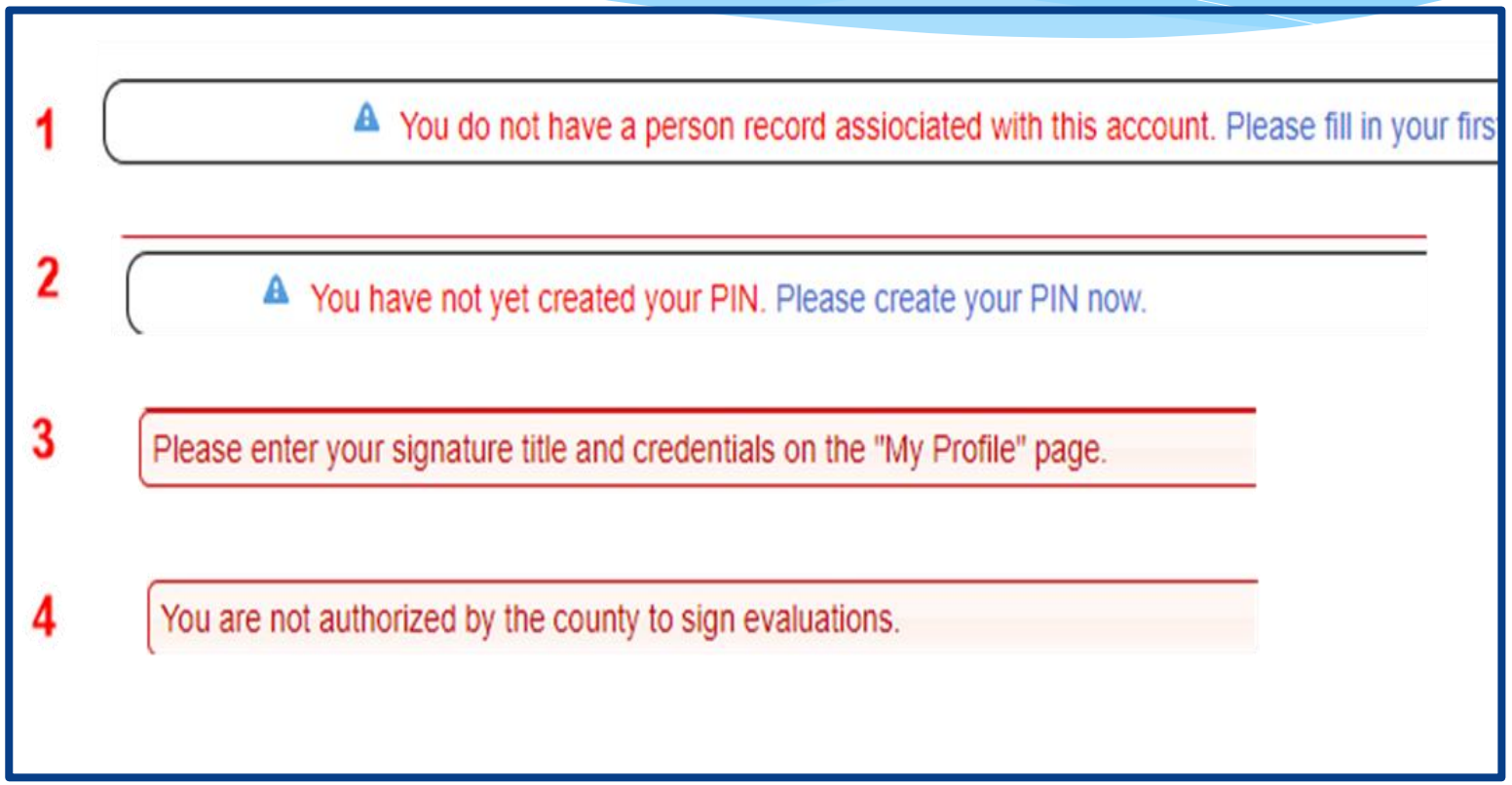
Submitting Evaluations
Error Messages

1. You did not create your first and last name.

2. You did not create a PIN for your Portal account.

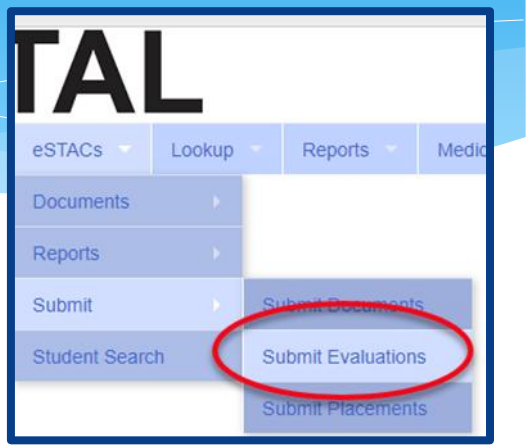
3. You did not create your signature and title.

4. Your district's authorization paperwork was not sent to McGuinness or you are not listed on the paperwork to sign and submit evaluations.

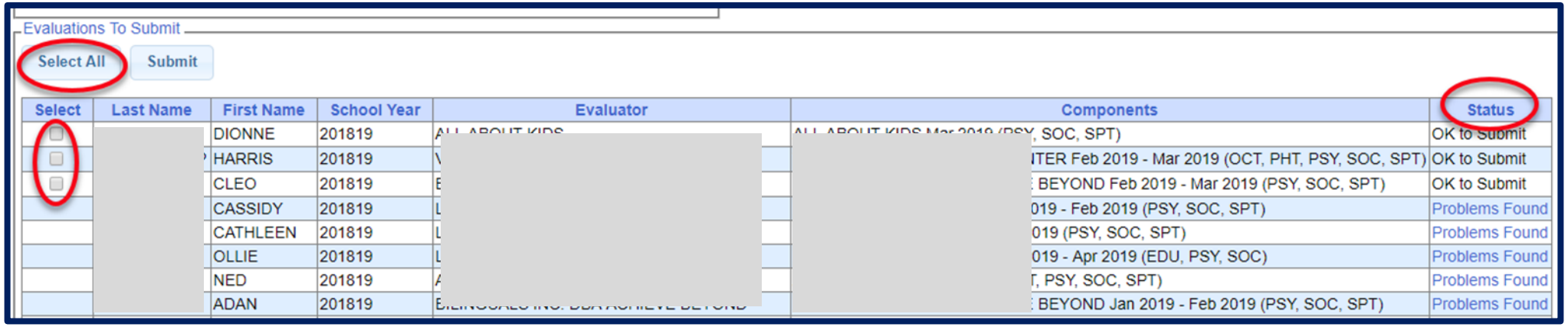


For help, email: eSTACs@CPSEPortal.com

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

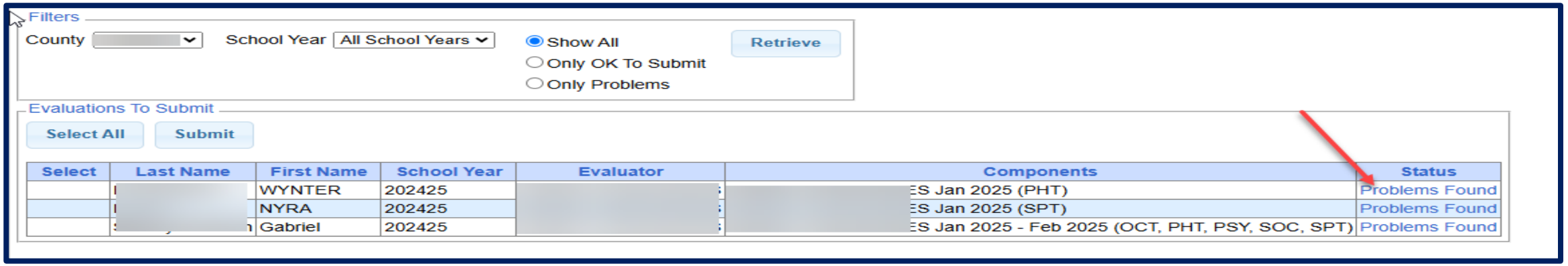


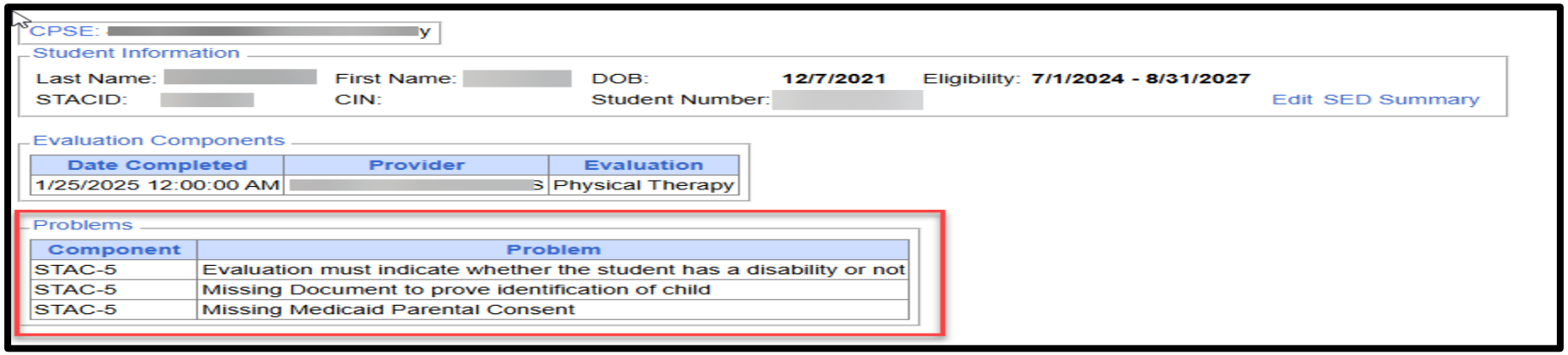
* Go to ***eSTACs -> Submit -> Submit Evaluations***
* This grid displays unsubmitted evaluations based on selected filters.
* Rows where Status = "OK To Submit" will have a checkbox.
* Rows where Status = "Problems Found" will not have a checkbox.
* Mark the checkbox on the rows that you wish to submit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



Cannot Submit – Problems Found

* Click on the Problems Found and the problems will populate as to why you cannot sign & submit. You will need to upload the missing documents or correct errors before you can sign and submit.

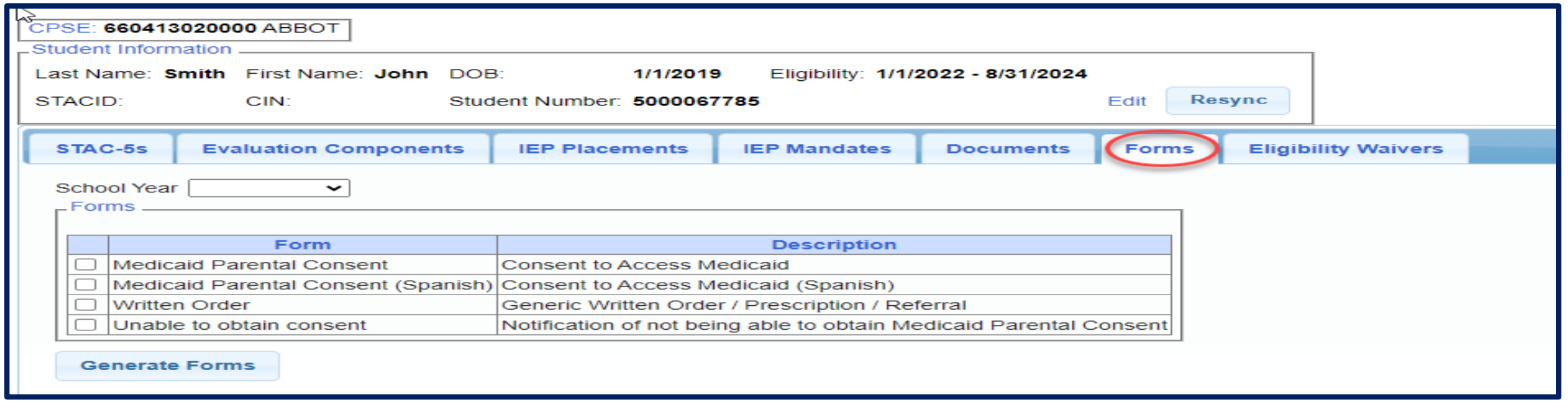




Forms

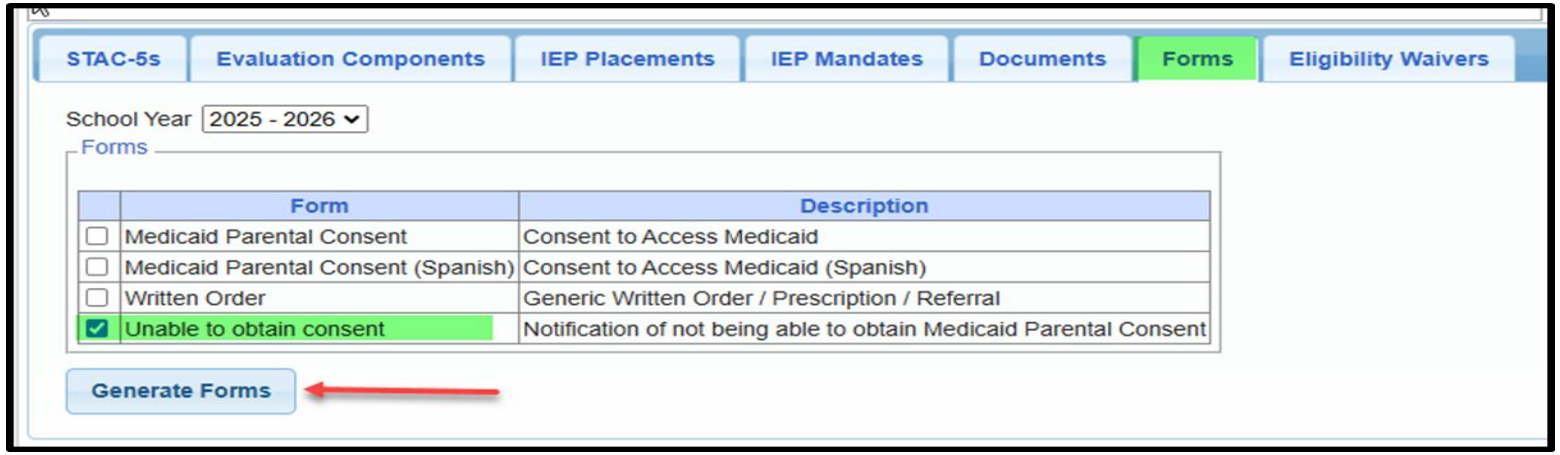
Forms Tab

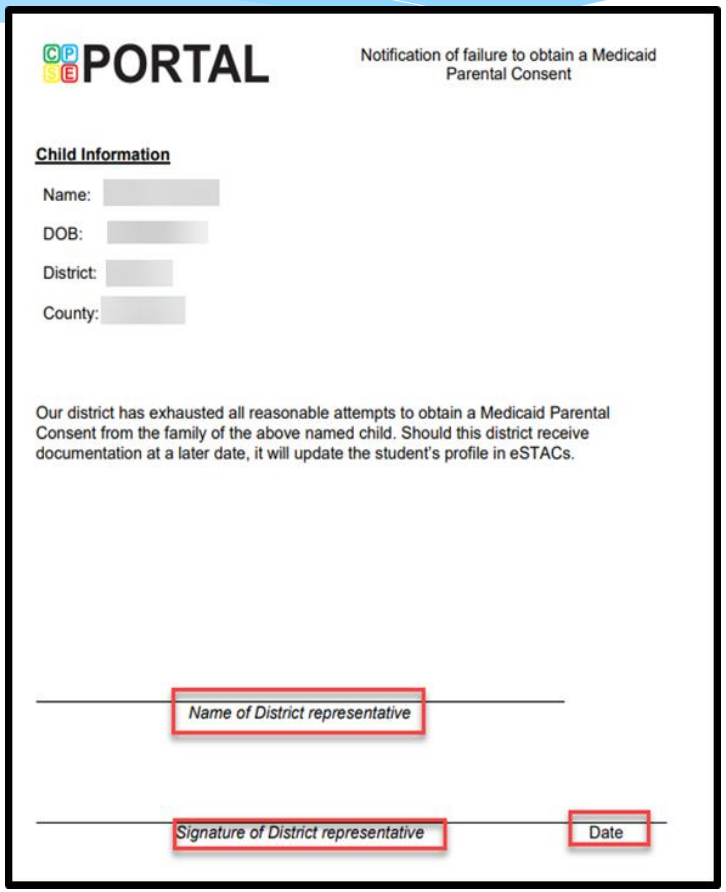
* The Forms tab has a list of generic forms that when chosen, will populate with the child's information on them.
  * For any Full-Service Medicaid counties, the Medicaid Parental Consent form will be on your Counties letterhead and is not generic.



Forms Tab

* If you could not obtain a Medicaid Consent, you can click on the Unable to Obtain Consent form.
* Complete form & upload as Failed to Obtain Medicaid Parental Consent.
* Once you receive the Medicaid Consent back from the parent(s), upload the consent into the child's documents page.





Evaluation Amendments

Amending Evaluations

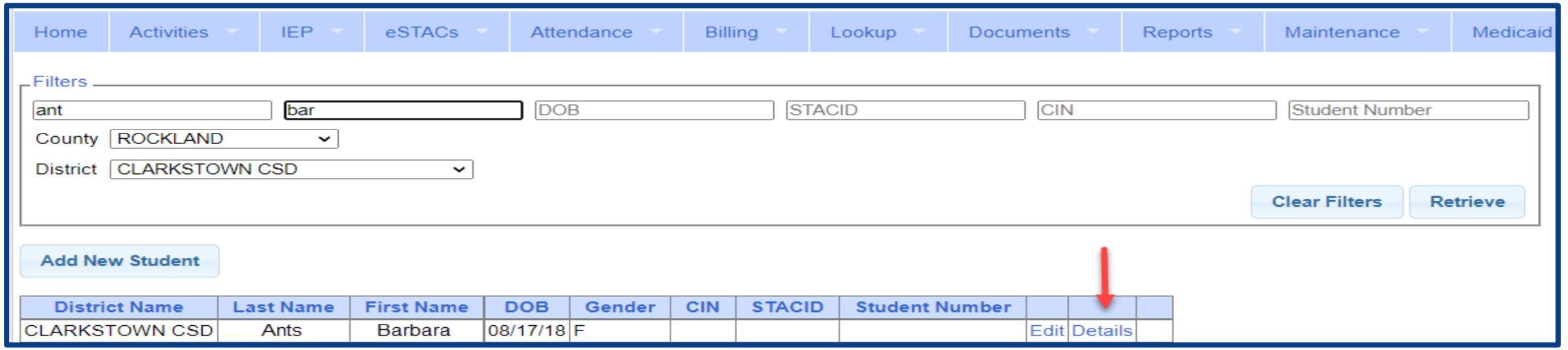
Evaluation Amendments

What needs to be changed	What to do
Entered wrong county	**Rescind** entire STAC-5 and submit a new one.
Entered wrong District	
Entered wrong school year	
Entered the wrong Provider for every component	
Entered the wrong discipline	**Rescind** the specific Evaluation Component, create a new STAC-5 with the correct component and/or provider.
Entered the wrong Provider for one Component	
Need to add a new Discipline(s)	Add a new STAC-5 for just the new Discipline(s).
Entered the wrong Evaluation Date	If the wrong evaluation date is in the same month, then **amend** and change the date. If the wrong evaluation date should be in another month or school year, **rescind** the specific evaluation component under the Evaluation Components tab. Under the STAC-5 tab, add a new STAC-5 for the evaluation component with the correct date.
Entered the wrong Bilingual Indicator	**Amend** the specific evaluation component and correct the Bilingual Indicator.

eSTACs Entering STAC-1 for Center Based and Center Based Related Services

Search and View Student Details

* Enter child's name to search for child and click on Retrieve.
* Click on Details to get to the student details page with evaluations, services, documents and forms.

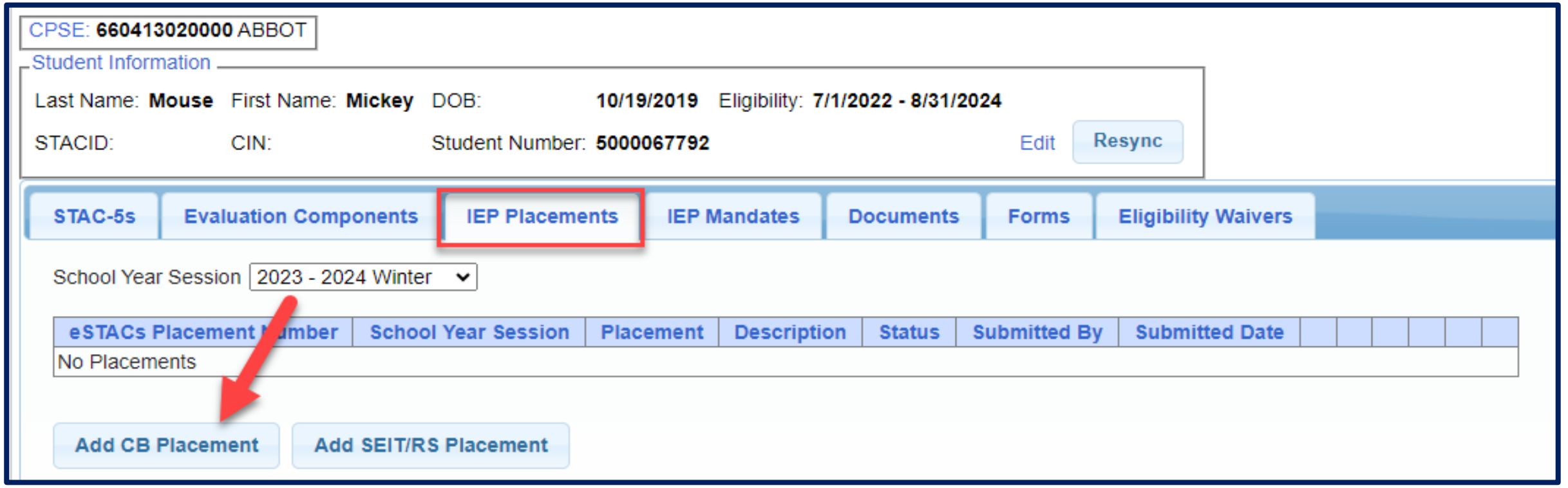


For help, email: eSTACs@CPSEPortal.com

Adding New Center Based Placements

Adding a new CB Placement for STAC-1

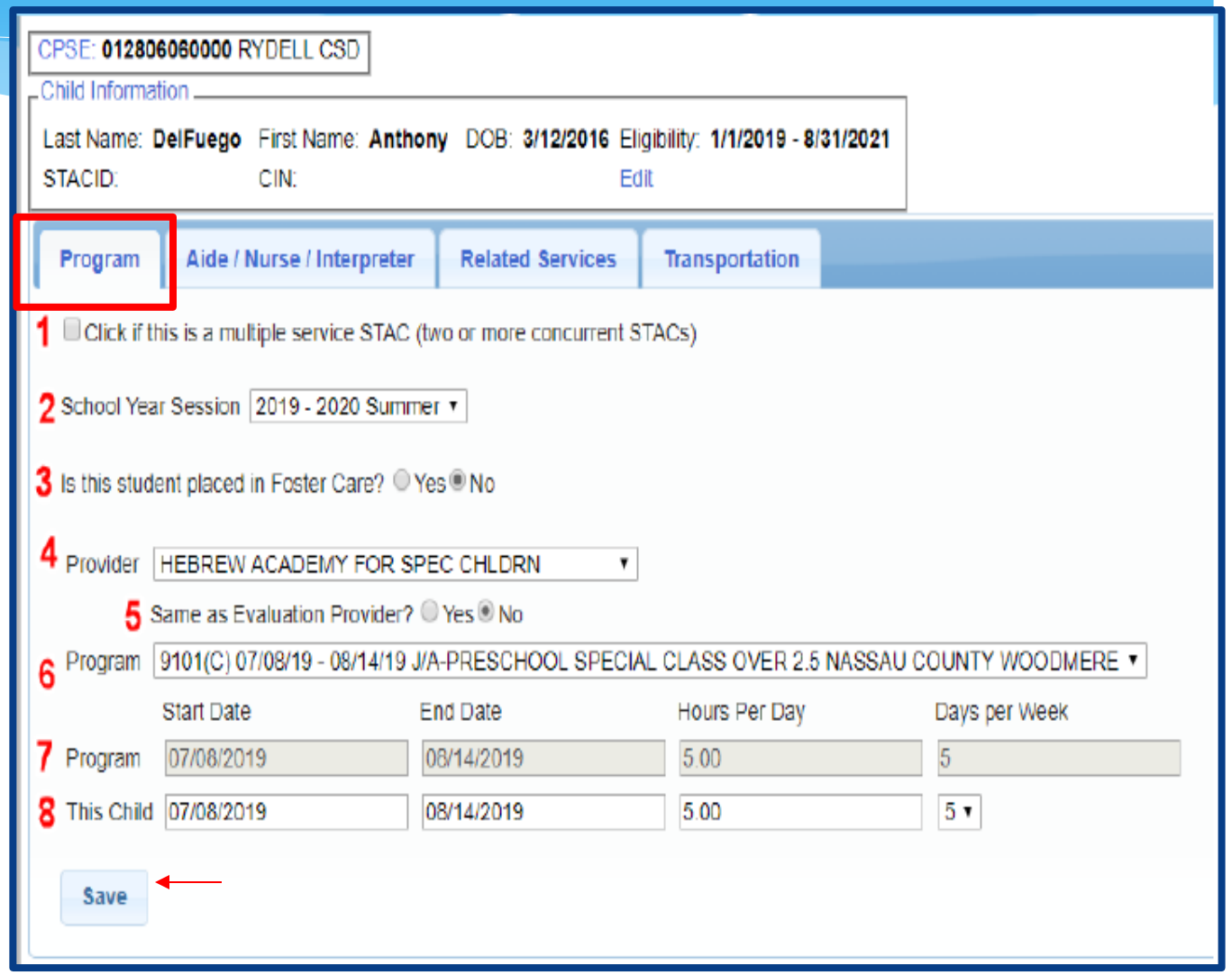
* Go to the IEP Placements tab
* Click *Add CB Placement*



For help, email: eSTACs@CPSEPortal.com

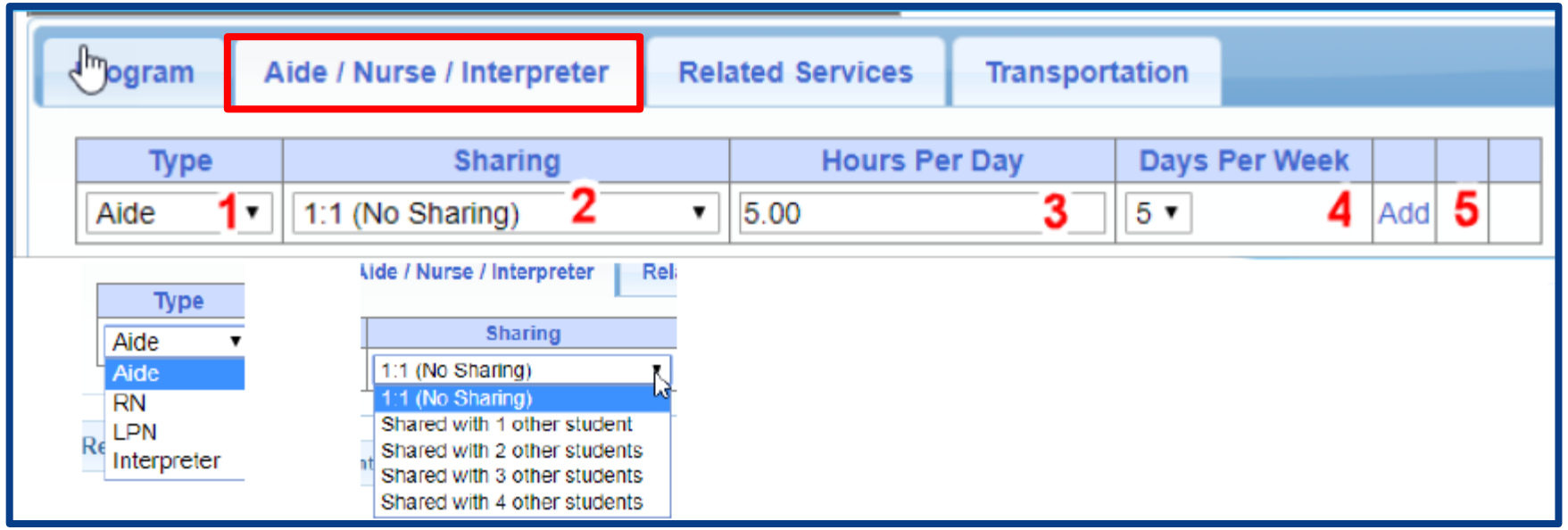
Entering Program Information

1. Check this box if the child has multiple STACs for the same time period (CB + SEIT/RS, CB morning + CB afternoon).
2. Specify school year / session.
3. Indicate if the child is placed in foster care.
4. Choose the Provider.
5. Indicate whether the Provider is the same provider that performed the most recent evaluation.
6. Select the specific program the child will attend.
7. This populates with the dates and hours the selected program runs.
8. Enter the dates and hours that this student will attend this program and click ***Save.***

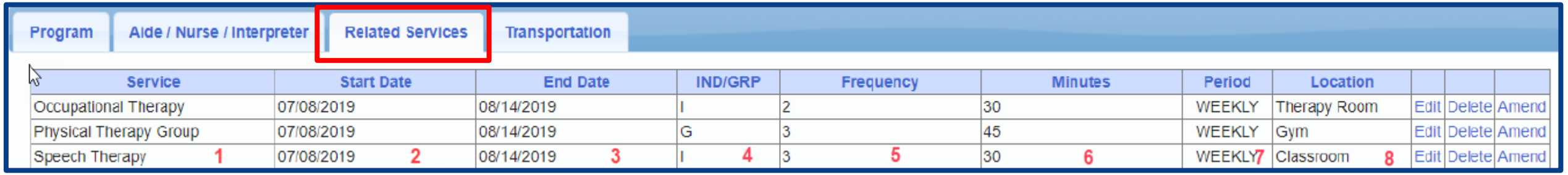


Adding Aides / Nurse / Interpreter

* To add an Aide/Nurse or Interpreter. You can skip this tab if no Aide/Nurse/Interpreter.
  1. Select the type (Aide, LPN, RN, or Interpreter).
  2. Select whether this service is shared with another student.
  3. Indicate the hours per day this service is provided.
  4. Indicate the days per week this service is provided.
  5. Click ***Add***.



Adding Related Services INCLUDED in Tuition



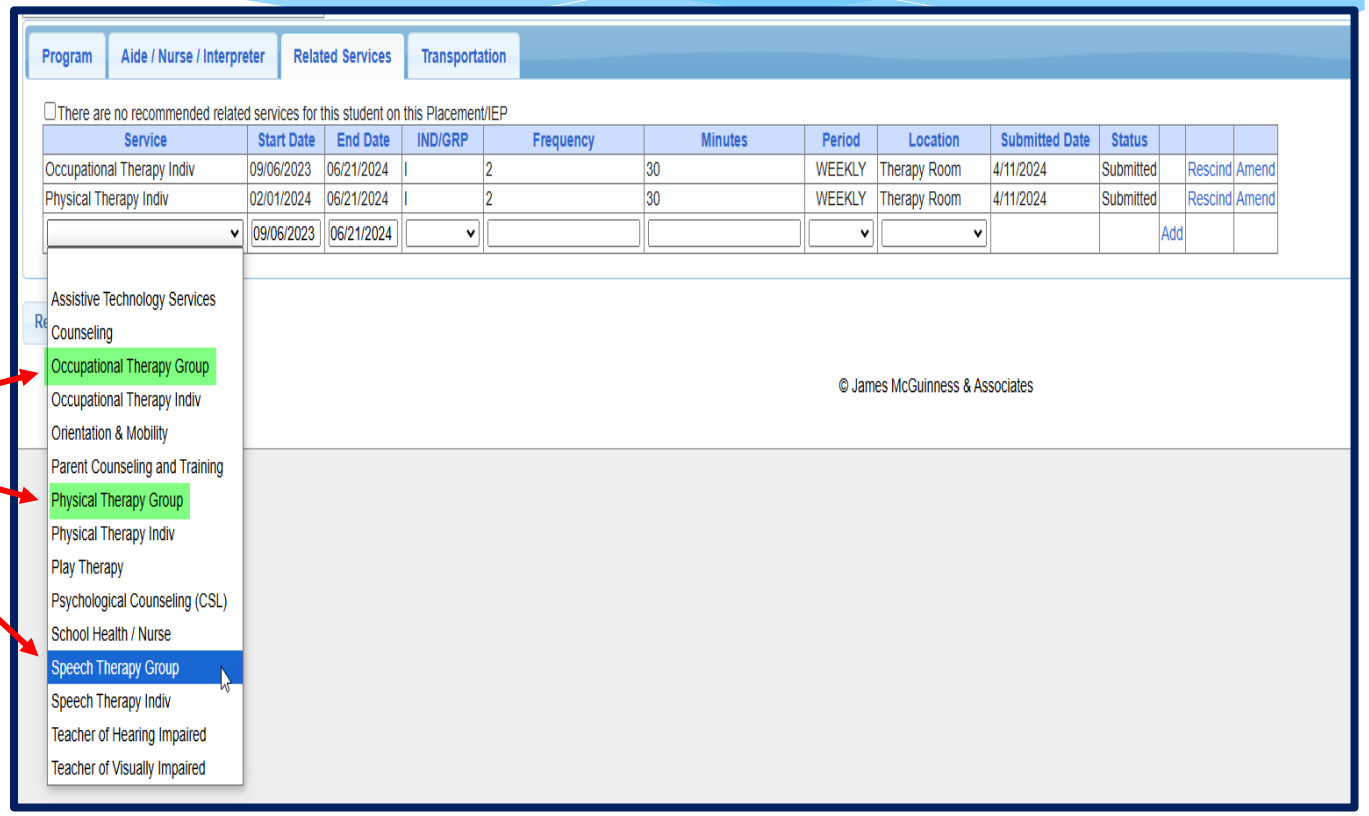
Service	Start Date	End Date	IND/GRP	Frequency	Minutes	Period	Location			
Occupational Therapy	07/08/2019	08/14/2019	I	2	30	WEEKLY	Therapy Room	Edit	Delete	Amend
Physical Therapy Group	07/08/2019	08/14/2019	G	3	45	WEEKLY	Gym	Edit	Delete	Amend
Speech Therapy 1	07/08/2019 2	08/14/2019 3	I 4	3 5	30 6	WEEKLY7	Classroom 8	Edit	Delete	Amend

1. The type of service .
2. The start date of this service.
3. The end date for this service.
4. Whether the service is Individual (I) or Group (G).
5. The number of sessions per period.
6. The number of minutes for each session.
7. The period of time for this service .
8. Location where service will be performed.

Center Based Related Services

* The most common group services are OT, PT & ST.
* For OT, PT & ST group services:
  * Make sure that you select group and not individual. Group services are designated with a 1.

    For example: ST1, OT1 & PT1.

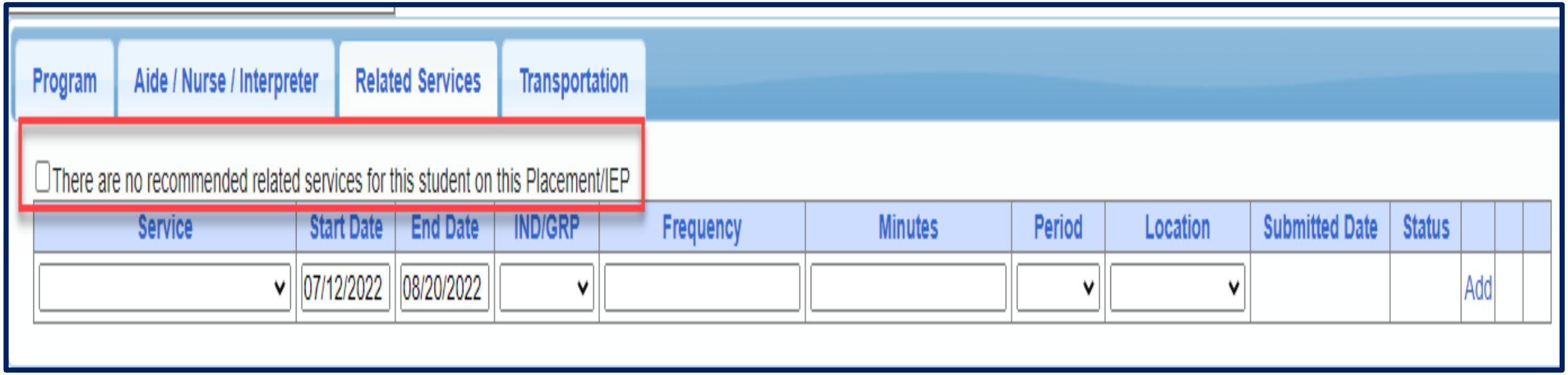


When IEP has no Center Based Related Services

* If the IEP does not specify any related services, check the box at the top of the related services tab that says:

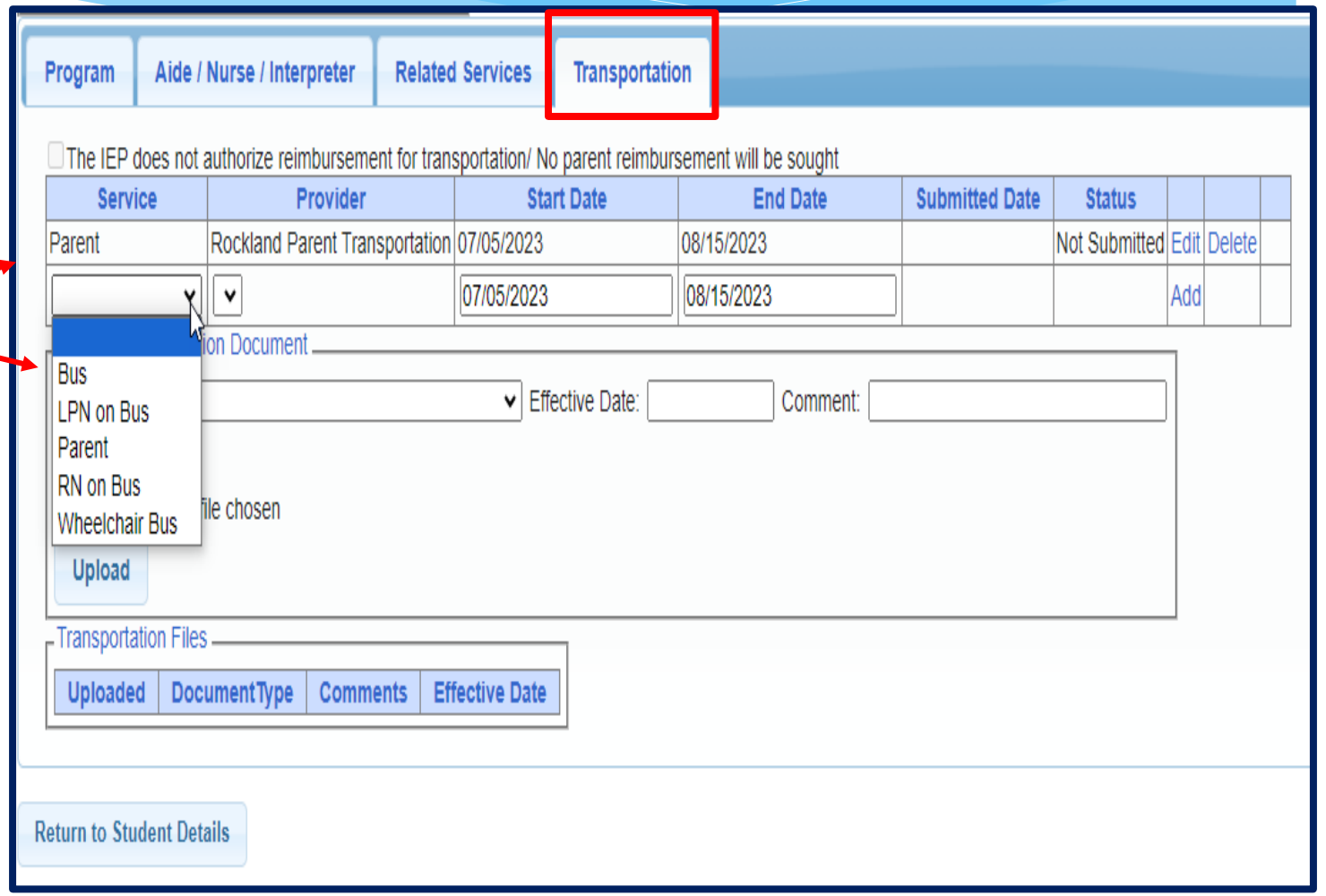
  "There are no recommended related services for this student on this Placement / IEP"

* If you do not enter CBRS services or do not check this box, you will receive an error when signing and submitting.



Adding Transportation

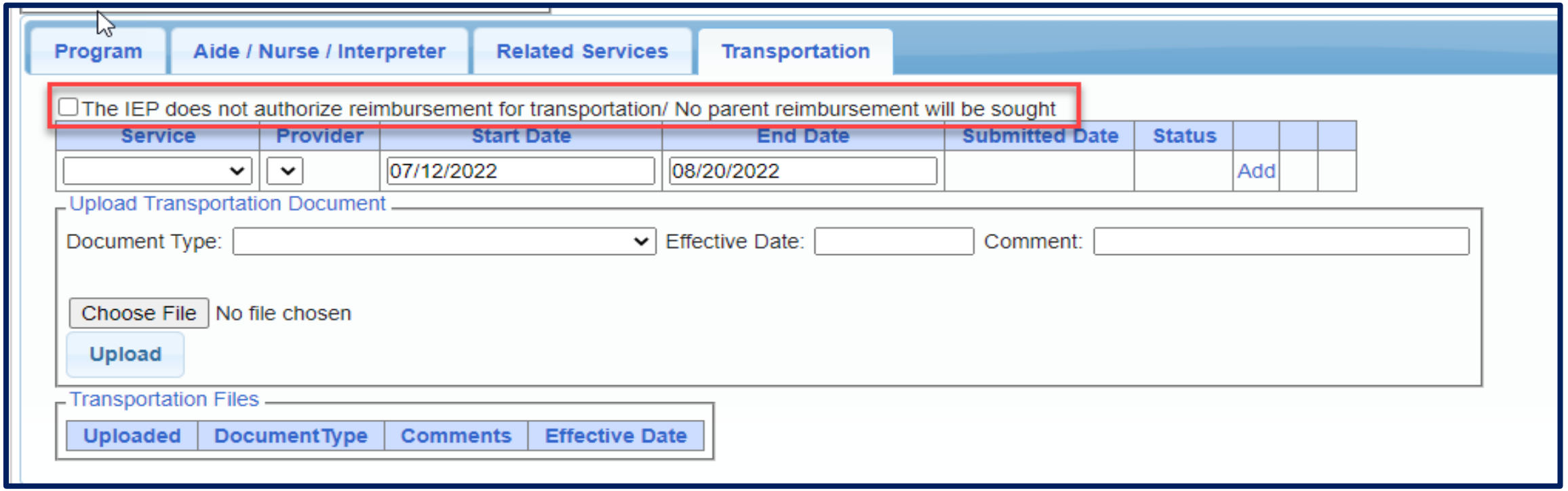
1. A list of types of transportations indicated in IEP (Bus or Parent reimbursement).
2. If transportation is needed, you will choose the bus and the parent.
3. No transportation documents will need to be uploaded.
4. Check the final page of IEP to ensure that **transportation is delineated on Special Transportation section.**



When IEP has no Transportation

* If the student will **not** be bussed **and** the parent will **not** be submitting for mileage reimbursement, check the box at the top of the transportation tab that says

  "The IEP does not authorize reimbursement for transportation"



Adding New SEIT/RS Placements

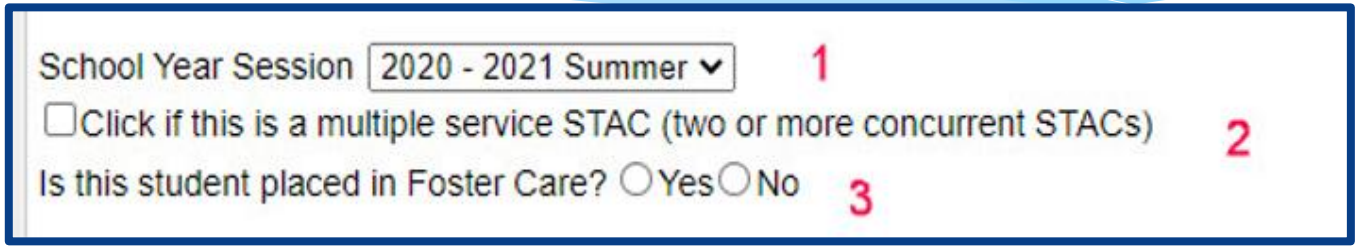
Adding a new STAC-1 for SEIT/Related Services

* Go to the IEP Placements tab
* Click Add SEIT/RS Placement

For help email: eSTACs@CPSEPortal.com

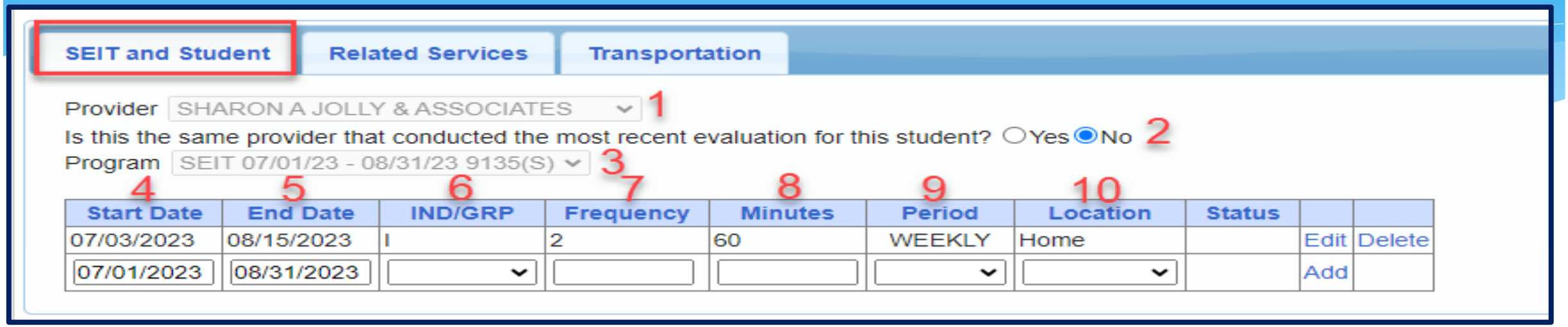
For SEIT or RS

1. Select the School Year and Session.
2. Indicate if this student has two or more concurrent STACs.
3. Indicate if the child is in Foster Care.



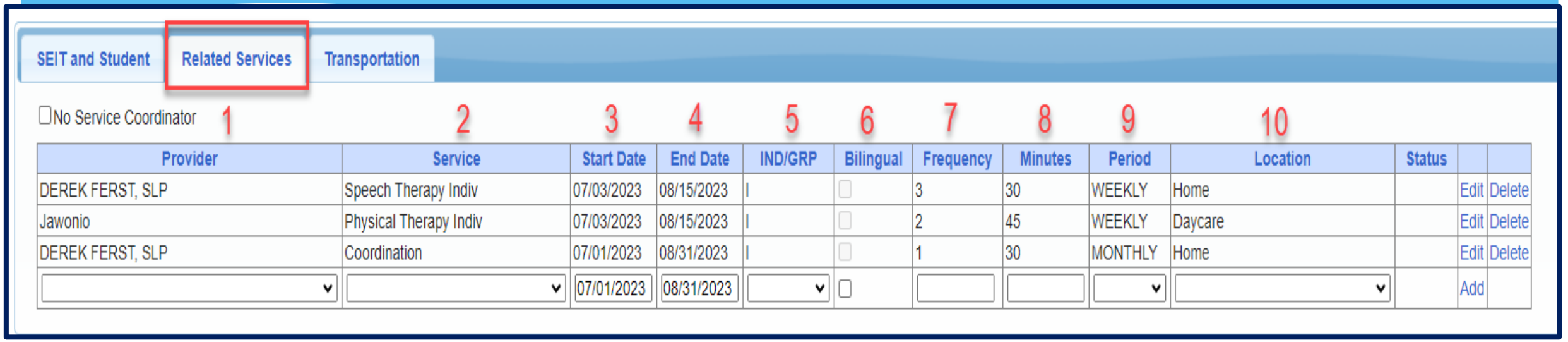
- Multiple Service / Concurrent STACs
  - Student has a Center Based placement at the same time as having SEIT or fee for service related services.
  - Student has two separate Center Based placements.
  - Student has SEIT at the same time from two separate SEIT Providers.
    - Each SEIT provider must have their own STAC-1.

Adding SEIT



1. Select Provider.
2. Indicate if Provider was same provider that did most recent evaluation.
3. Select the program (should be only 1).
4. Edit the Start Date.
5. Edit the End Date.
6. Indicate individual or group.
7. Indicate number of sessions per IEP.
8. Indicate number of minutes per IEP (**do not convert to 30 min**).
9. Enter the period for the frequency.
10. Select the location where the service will be performed.

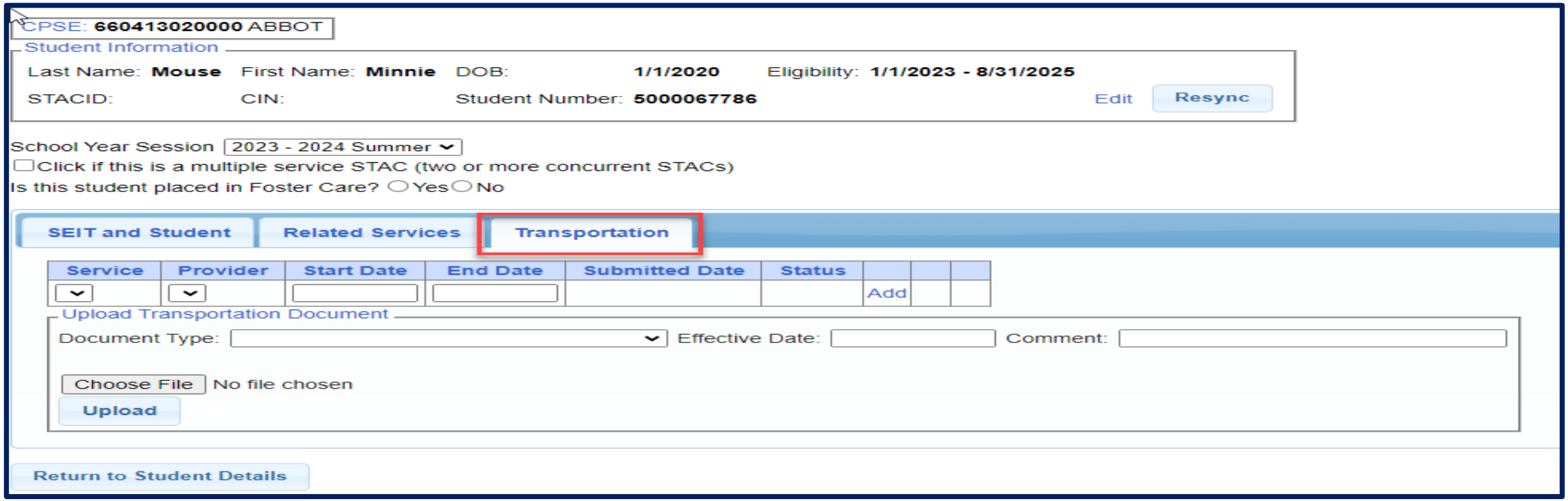
Adding Related Services
(fee for service not CBRS)



1. Choose the provider.
2. Select the service.
3. When does service start.
4. When does service end.
5. Indicate Individual or Group.
6. If Bilingual service – then check box.
7. Indicate number of sessions per IEP.
8. Enter minutes per session per IEP.
9. Choose the time period for the frequency.
10. Indicate where the service will happen.

Transportation for SEIT or Related Services

* Some counties pay transportation for SEIT or RS students.
  * **Check with your county first before adding transportation for SEIT or Related Service.**



Co-Treats

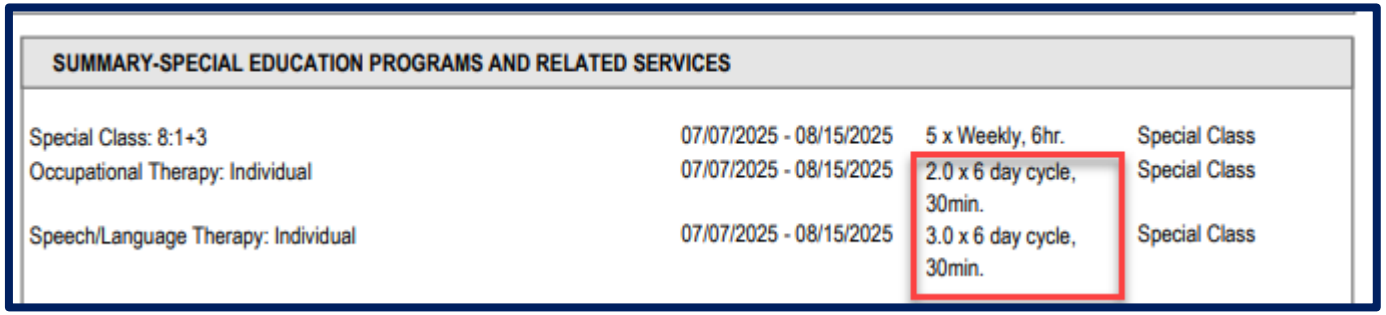
Co-Treats

* There is no special way to denote co-treats in eSTACs.
  * Enter services PER the IEP:
    * If OT is 2x30, and co-treat is 1x30, then enter into eSTACs:
      * OT 2x30
      * OT 1x30
    * If ST is 3x45, and co-treat is 1x30, then enter into eSTACs:
      * ST 3x45
      * ST 1x30
    * The clinician's will know how to enter their session notes for co-treating.

6 Day Cycle

6 Day Cycle

* If any providers follow a 6 day cycle:
  * Enter to match the IEP.
  * If ST is 3 x 6 day cycle, then enter ST 3x30.
    * The providers will figure out the cycle and follow it on their calendar.
* The services on the IEP must state 6 day cycle.

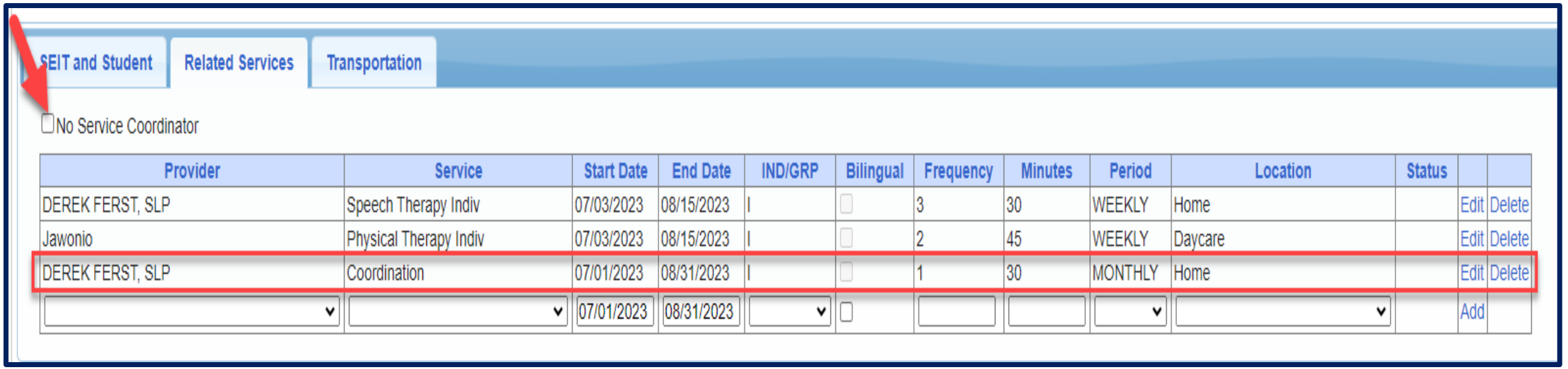


SUMMARY-SPECIAL EDUCATION PROGRAMS AND RELATED SERVICES			
Special Class: 8:1+3	07/07/2025 - 08/15/2025	5 x Weekly, 6hr.	Special Class
Occupational Therapy: Individual	07/07/2025 - 08/15/2025	2.0 x 6 day cycle, 30min.	Special Class
Speech/Language Therapy: Individual	07/07/2025 - 08/15/2025	3.0 x 6 day cycle, 30min.	Special Class

Service Coordination

Service Coordination

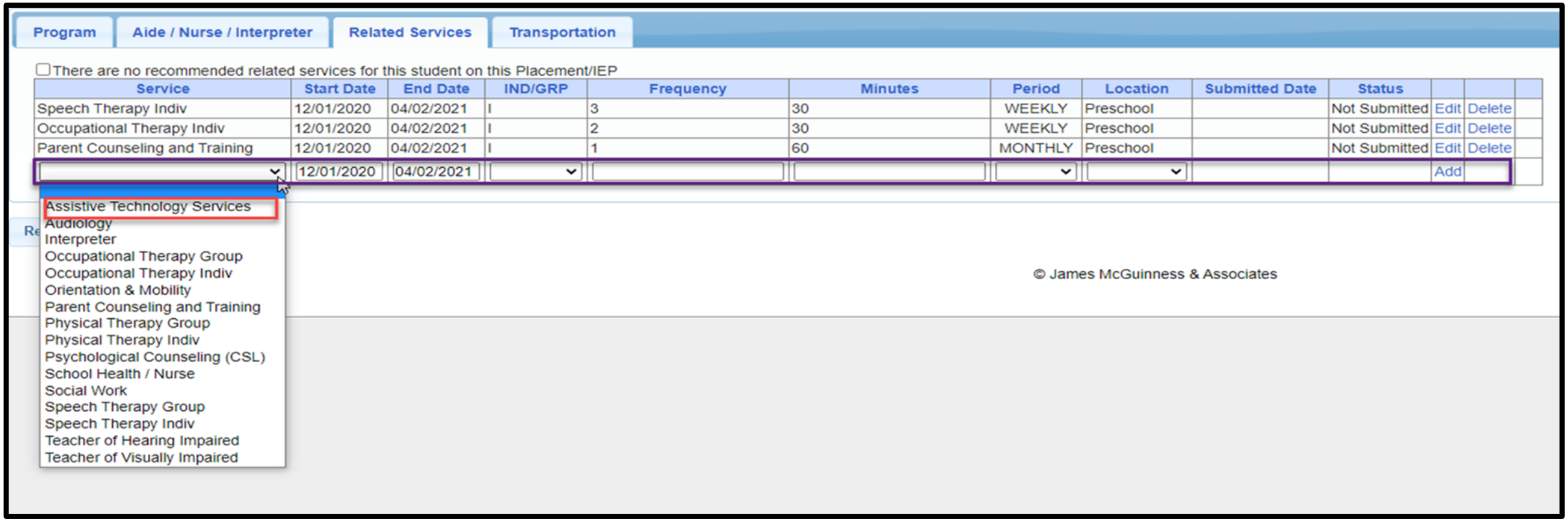
* If there are no SEIT services and there are two or more related services, and service coordination is needed:
  * Choose provider, and Coordination under Service tab, and complete other information.
* If there are no SEIT services and Service Coordination is not needed:
  * Mark the checkbox *"No Service Coordinator"*.



Assisted Tech Service and Assisted Tech Device

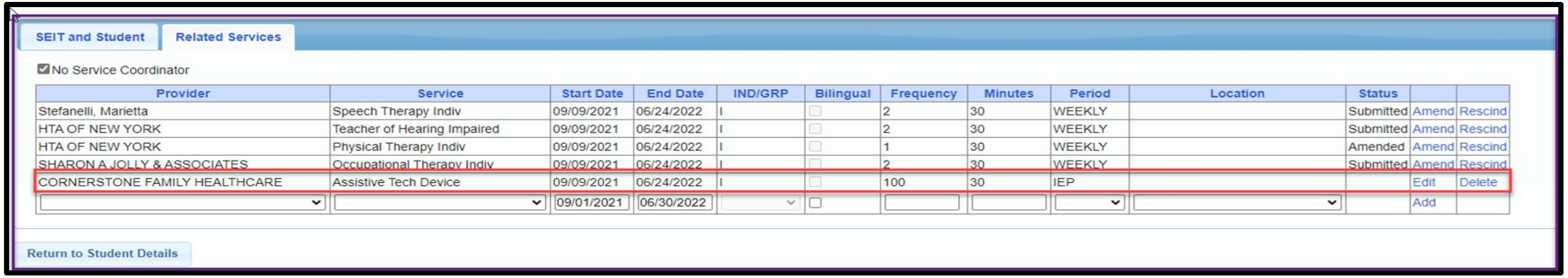
Assistive Technology Services

* Assistive Technology Services will be added to the Related Services tab.
* This can be either under the CB Placement or the SEIT/RS Placement.



Assistive Tech Device

* In most cases, the user of the Assistive Tech Device will obtain the device.
* The device will **never** be part of the CB as it is NOT included with the tuition.
* If the cost of the device is:
  * Less than $1000 – then enter frequency of **10**x30
  * If more than $1,000 – then enter frequency of **100**x30
* Always contact your county first.



SEIT and Student | Related Services

No Service Coordinator

Provider	Service	Start Date	End Date	IND/GRP	Bilingual	Frequency	Minutes	Period	Location	Status		
Stefanelli, Marietta	Speech Therapy Indiv	09/09/2021	06/24/2022	I		2	30	WEEKLY		Submitted	Amend	Rescind
HTA OF NEW YORK	Teacher of Hearing Impaired	09/09/2021	06/24/2022	I		2	30	WEEKLY		Submitted	Amend	Rescind
HTA OF NEW YORK	Physical Therapy Indiv	09/09/2021	06/24/2022	I		1	30	WEEKLY		Amended	Amend	Rescind
SHARON A JOLLY & ASSOCIATES	Occupational Therapy Indiv	09/09/2021	06/24/2022	I		2	30	WEEKLY		Submitted	Amend	Rescind
CORNERSTONE FAMILY HEALTHCARE	Assistive Tech Device	09/09/2021	06/24/2022	I		100	30	IEP			Edit	Delete
		09/01/2021	06/30/2022								Add	

Return to Student Details

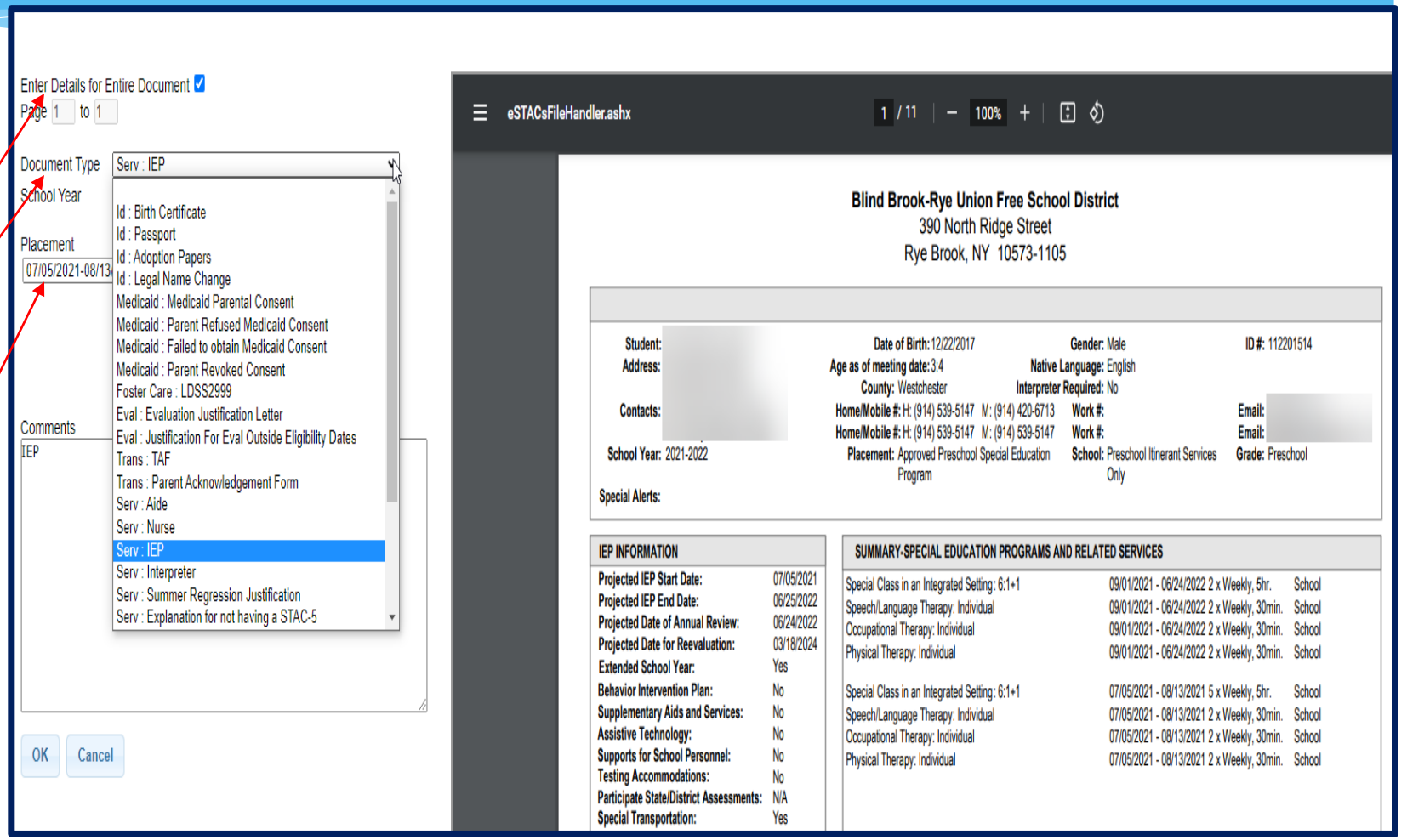
Uploading Documents

Documents Required for Services

* Most counties require documents to be uploaded before you can sign and submit your STAC-1. Please contact your county to see what they require.
* Below are some documents that may be required:
  * **A Medicaid Parental Consent:**
    * A signed Medicaid Parental Consent or an Unable to Obtain Medicaid Consent.
  * **The IEP:**
    * All dates and services on the IEP must match the entries in eSTACs.
  * **Proof of Identification:**
    * A birth certificate, passport or other identifying documents.
  * **A Consent to Initiate Services.**

Uploading a Document

* Right had side shows the document being uploaded.
* If uploading the entire IEP, then check box "*Enter Details for Entire Document*".
* Choose document type.
* Choose correct school year and placement.

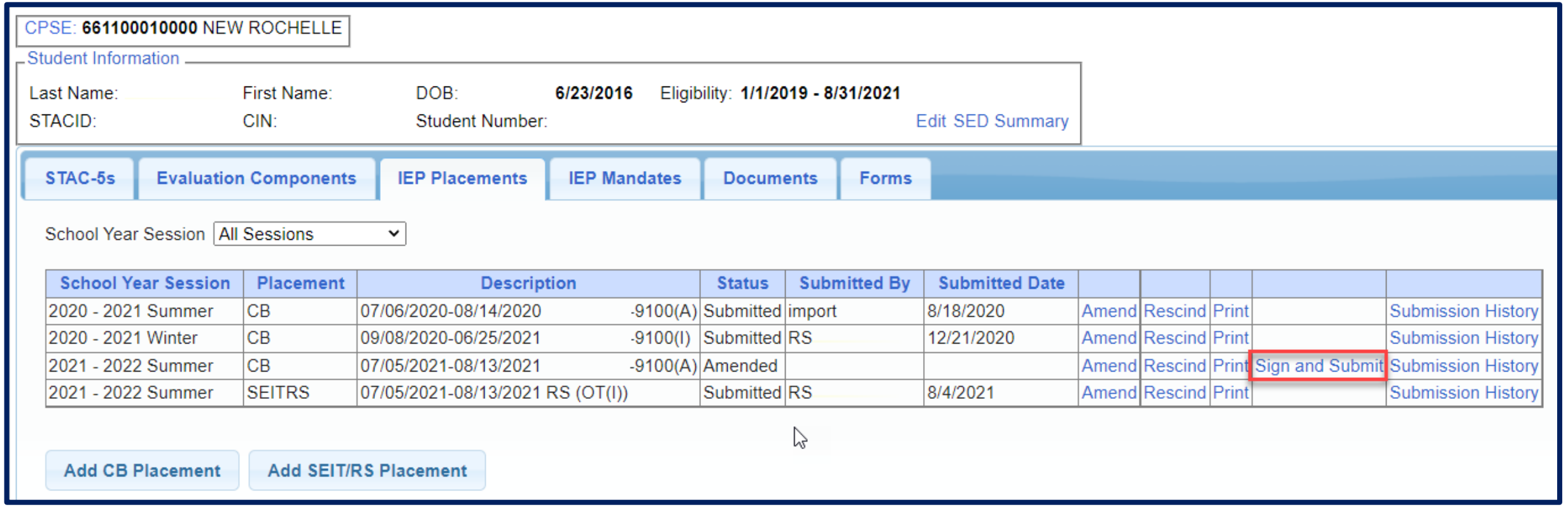


For help, email: eSTACs@CPSEPortal.com

Signing and Submitting STAC-1

Signing and Submitting

* Once all information is entered from the IEP, you will now need to *Sign and Submit* the CB Placement.



Compare CB Placement to IEP

* Compare **ALL** of your entries on left side to IEP on right side. **Do not** sign & submit if not correct.
  * Does the service match (individual or group); Does the frequency and duration match; Do the dates match?

Student Name
DOB 6/23/2016
STAC ID
Student #

CPSE District NEW ROCHELLE
County WESTCHESTER

School Year: 2021 - 2022 Summer **Placement Type:** CB **Provider:**

☐ Show Rescinded

Print STAC-1

Placements To Submit

Provider	From Date	To Date	Service Type		Frequency	Location
[redacted]	7/5/2021	8/13/2021	9100-A J/A-PRESCHOOL SPECIAL CLASS OVER 2.5	1	5 hrs/day	Classroom
[redacted]	7/5/2021	8/13/2021	Occupational Therapy Indiv	2	2x30	Preschool
[redacted]	7/5/2021	8/13/2021	Physical Therapy Indiv	3	1x30	Preschool
[redacted]	7/5/2021	8/13/2021	Speech Therapy Group	4	1x30	Preschool
[redacted]	7/5/2021	8/13/2021	Speech Therapy Indiv	5	2x30	Preschool
[redacted]	7/5/2021	8/13/2021	Transportation : Parent			

Submit

1 / 14

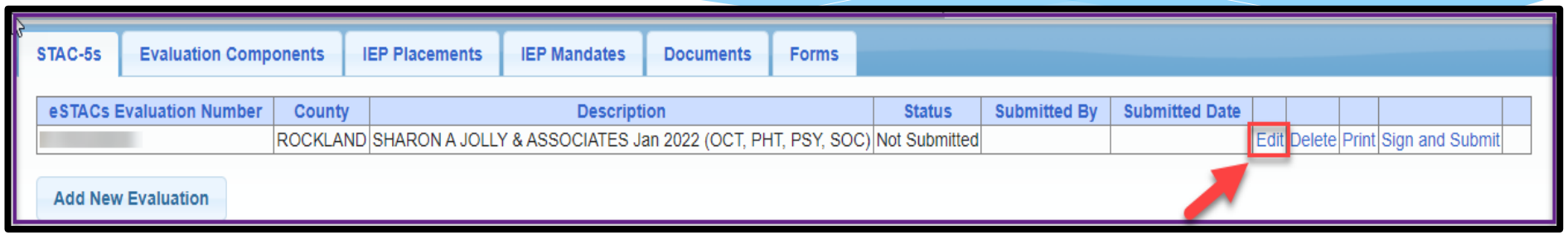
SUMMARY-SPECIAL EDUCATION PROGRAMS AND RELATED SERVICES

1	Special Class: 8:1•2	07/05/2021 - 08/13/2021 5 x Weekly, 5hr. 30min.	Special Class
2	Occupational Therapy: Individual	07/05/2021 - 08/13/2021 2 x Weekly, 30min.	School
3	Physical Therapy: Individual	07/05/2021 - 08/13/2021 1 x Weekly, 30min.	School
5	Speech/Language Therapy: Individual	07/05/2021 - 08/13/2021 2 x Weekly, 30min.	School
4	Speech/Language Therapy: Small Group	07/05/2021 - 08/13/2021 1 x Weekly, 30min.	School

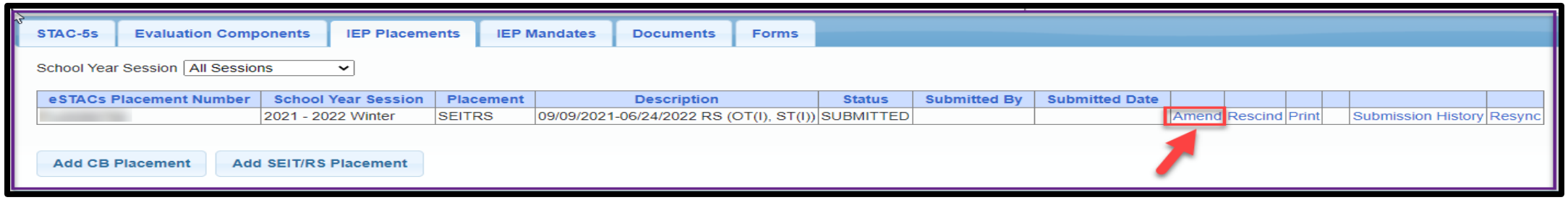
Amendments and/or Corrections

Amendments

* Prior to submitting a STAC to the County, you can ***Edit*** a placement and make any necessary changes.



* After you submit a STAC to the County, you must ***Amend*** the placement to make any changes.

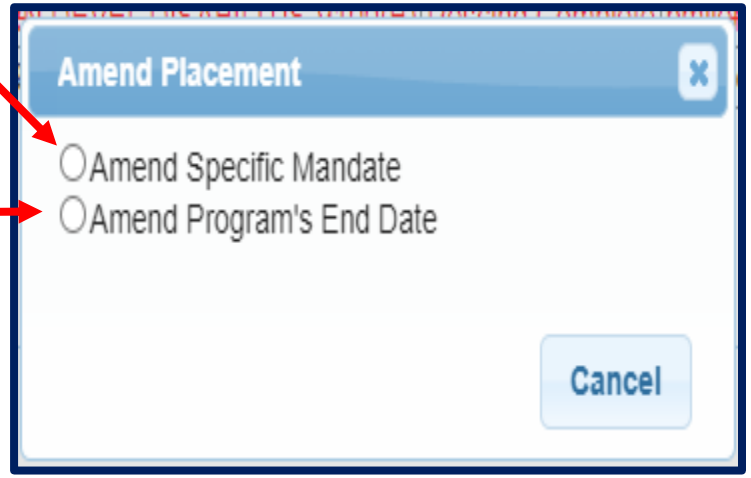


* Once a STAC is submitted, you are limited as to what changes can be made.

Amendments

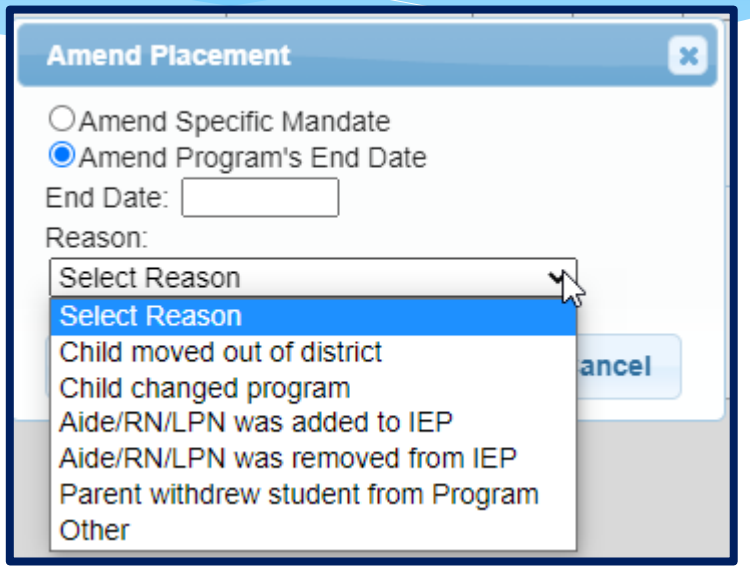
* Now choose to “Amend Specific Mandate” to make changes to the STAC such as:
  * You need to change the start/end dates,
  * You need to add a new service to the STAC,
  * You need to change a location on the STAC,
  * You need to change the CB program listed on the STAC,
  * You need to rescind a service.

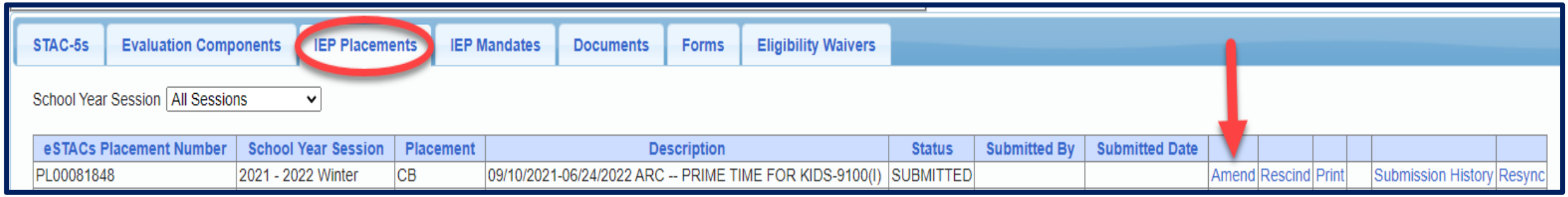
* Amend Program’s End Date
  * To end all services on a specific date.



Amending at IEP Placement Level

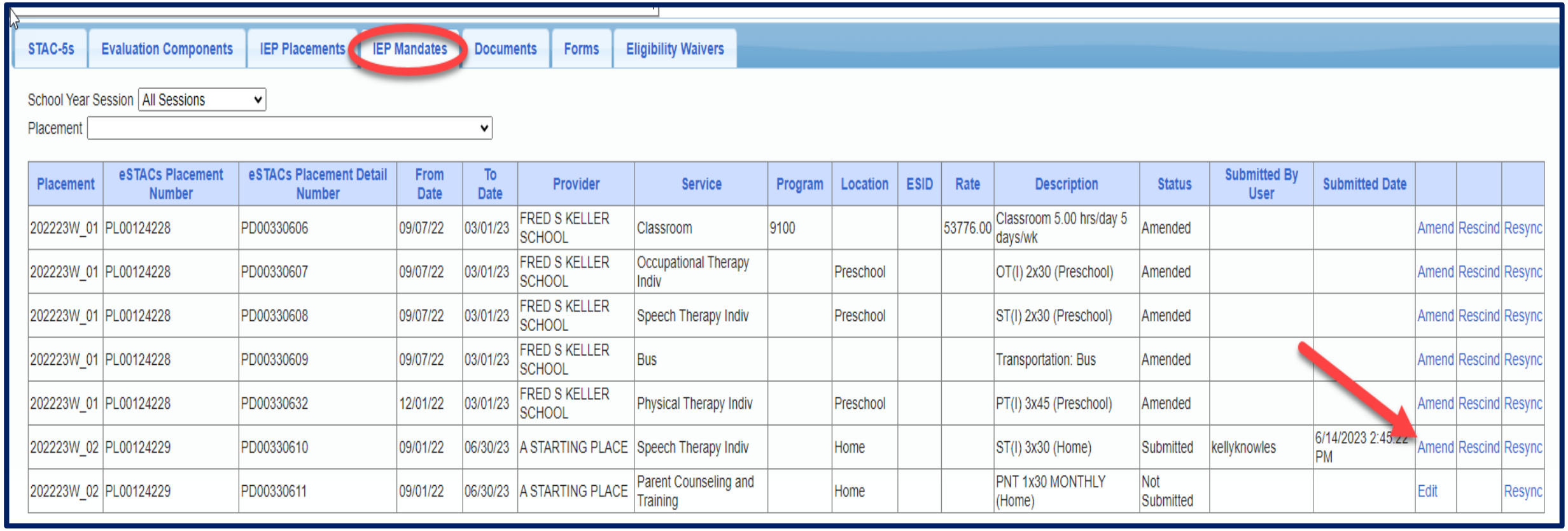
* All instances below will need to have the Placement End Dated:
  * Child moved out of district mid-year
  * Child changed CB programs mid-year
  * Child added an AIDE mid year
  * Child ended an AIDE mid year
  * Parent withdrew their student mid year
  * Child switched from CB to SEIT/RS mid-year (or vice-versa)
  * Other – child declassified





Amending at Details Level

* Under the "IEP Mandates" tab you can Amend or Rescind just one specific service.



STAC-5s | Evaluation Components | IEP Placements | IEP Mandates | Documents | Forms | Eligibility Waivers

School Year Session: All Sessions

Placement:

Placement	eSTACs Placement Number	eSTACs Placement Detail Number	From Date	To Date	Provider	Service	Program	Location	ESID	Rate	Description	Status	Submitted By User	Submitted Date			
202223W_01	PL00124228	PD00330606	09/07/22	03/01/23	FRED S KELLER SCHOOL	Classroom	9100			53776.00	Classroom 5.00 hrs/day 5 days/wk	Amended			Amend	Rescind	Resync
202223W_01	PL00124228	PD00330607	09/07/22	03/01/23	FRED S KELLER SCHOOL	Occupational Therapy Indiv		Preschool			OT(I) 2x30 (Preschool)	Amended			Amend	Rescind	Resync
202223W_01	PL00124228	PD00330608	09/07/22	03/01/23	FRED S KELLER SCHOOL	Speech Therapy Indiv		Preschool			ST(I) 2x30 (Preschool)	Amended			Amend	Rescind	Resync
202223W_01	PL00124228	PD00330609	09/07/22	03/01/23	FRED S KELLER SCHOOL	Bus					Transportation: Bus	Amended			Amend	Rescind	Resync
202223W_01	PL00124228	PD00330632	12/01/22	03/01/23	FRED S KELLER SCHOOL	Physical Therapy Indiv		Preschool			PT(I) 3x45 (Preschool)	Amended			Amend	Rescind	Resync
202223W_02	PL00124229	PD00330610	09/01/22	06/30/23	A STARTING PLACE	Speech Therapy Indiv		Home			ST(I) 3x30 (Home)	Submitted	kellyknowles	6/14/2023 2:45:22 PM	Amend	Rescind	Resync
202223W_02	PL00124229	PD00330611	09/01/22	06/30/23	A STARTING PLACE	Parent Counseling and Training		Home			PNT 1x30 MONTHLY (Home)	Not Submitted			Edit		Resync

Cheat Sheets

CB Amendments

CPSE determines	What to do
An AIDE/RN/LPN should be added to the IEP	End Placement and Create new placement with all necessary details
An AIDE/RN/LPN should be removed from the IEP	
The student should be in a different program (different provider, SC vs SCIS, half day vs full day etc.)	
The student no longer needs a particular related service	End Placement detail by amending end date of detail
The student will no longer receive a type of transportation	
The student needs an additional related service	Add additional placement details as necessary
The student will get a new type of transportation service (No transportation -> bus, bus->Bus + Parent, Bus-> Bus + AIDE)	
There should be a change to a related service (change in frequency, change from individual to group, change location)	End Placement detail by amending end date of detail, then add new placement detail
The child will change transportation (Bus->Parent, Parent->Bus)	

Corrections

Actions Needed to Correct Data in eSTACs by Field

Placement Type	Service Category	Requires Rescinding entire placement	Requires Rescinding single detail	Can correct data via amending
CB	CB	School Year Session Foster County Provider		Program (SC vs SCIS, half day vs full day) Start Date / End Date Hours Per Day / Days Per Week
	AIDE		Type (AIDE/LPN/RN) Sharing	Hours Per Day Days Per Week
	Related Service		Service Individual vs Group Frequency, Duration & Period	Start Date End Date
	Transportation		Service (Bus, Parent, LPN, etc.) Provider	Start Date End Date

For help, email: eSTACs@CPSEPortal.com

Corrections

Actions Needed to Correct Data in eSTACs by Field

	Center Based (CB)				SEIT and/or Related Services	
	CB	AIDE/RN/LPN	Related Service	Transportation	SEIT	Related Services
School Year Session	Rescind Entire Placement				Rescind Entire Placement	Rescind Entire Placement
Foster Care County	Rescind Entire Placement				Rescind Entire Placement	Rescind Entire Placement
Provider	Rescind Entire Placement				Rescind Entire Placement	Rescind single detail
Program	Amend				Rescind Entire Placement	
Sharing (AIDE)		Rescind single detail				
Service		Rescind single detail	Rescind single detail	Rescind single detail		Rescind single detail
Start Date	Amend		Amend	Amend	Amend	Amend
End Date	Amend		Amend	Amend	Amend	Amend
Hours Per Day	Amend	Amend				
Days Per Week	Amend	Amend				
Ind. Vs Group			Rescind single detail		Rescind single detail	Rescind single detail
Frequency			Rescind single detail		Rescind single detail	Rescind single detail
Duration			Rescind single detail		Rescind single detail	Rescind single detail
Period			Rescind single detail		Rescind single detail	Rescind single detail
Location			Amend		Amend	Amend

SEIT / RS Amendments

CPSE determines	What to do
The SEIT Provider should change	End Placement and Create new placement with all necessary details
The student no longer needs a particular related service	End Placement detail by amending end date of detail
The student no longer needs SEIT	
The student needs an additional related service	Add additional placement details as necessary
The student needs to have SEIT in addition to just RS	
There should be a change to a related service (change in frequency, change from individual to group, change location)	End Placement detail by amending end date of detail, then add new placement detail
There should be a change to the SEIT frequency or between individual and group.	

Corrections

Actions Needed to Correct Data in eSTACs by Placement Type

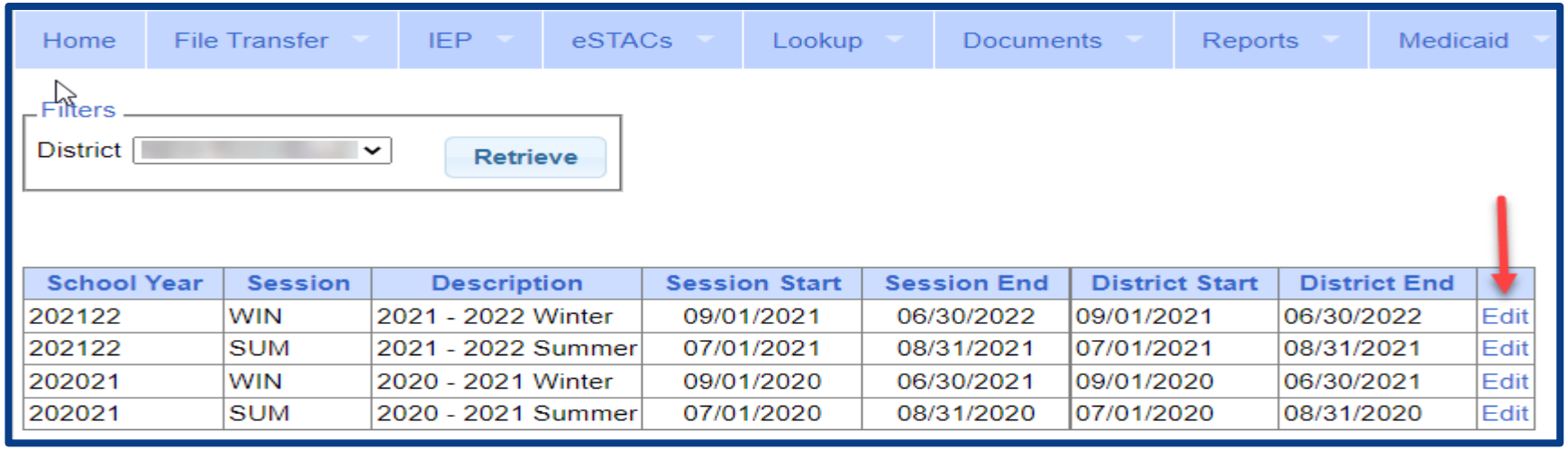
Placement Type	Service Category	Requires Rescinding entire placement	Requires Rescinding single detail	Can correct data via amending
SEIT/RS	SEIT	School Year Session Foster County Provider	Individual vs Group Frequency, Duration & Period	Start Date End Date Location
	Related Service	School Year Session Foster County	Provider Service Individual vs Group Frequency, Duration & Period	Start Date End Date Location

Reports

Changing District School Dates

* School district yearly dates are defaulted to:
  * Summer dates: July 1 – August 31
  * Winter dates: September 1 – June 30

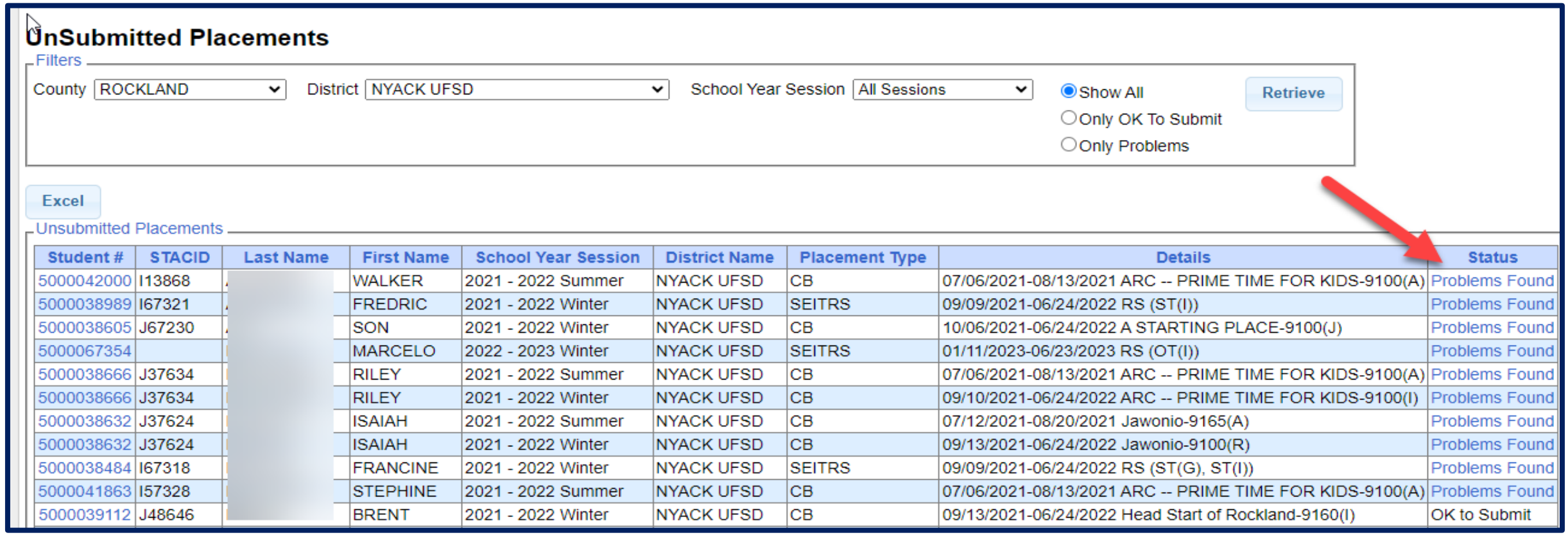
* Go to ***eSTACs -> Maintenance -> Default Session Dates for District***



School Year	Session	Description	Session Start	Session End	District Start	District End	
202122	WIN	2021 - 2022 Winter	09/01/2021	06/30/2022	09/01/2021	06/30/2022	Edit
202122	SUM	2021 - 2022 Summer	07/01/2021	08/31/2021	07/01/2021	08/31/2021	Edit
202021	WIN	2020 - 2021 Winter	09/01/2020	06/30/2021	09/01/2020	06/30/2021	Edit
202021	SUM	2020 - 2021 Summer	07/01/2020	08/31/2020	07/01/2020	08/31/2020	Edit

UnSubmitted Placements Report

* ***eSTACs -> Reports -> UnSubmitted Placements***
  * The Status column will show any "Problems Found".



UnSubmitted Placements

Filters

County ROCKLAND District NYACK UFSD School Year Session All Sessions

(•) Show All ( ) Only OK To Submit ( ) Only Problems Retrieve

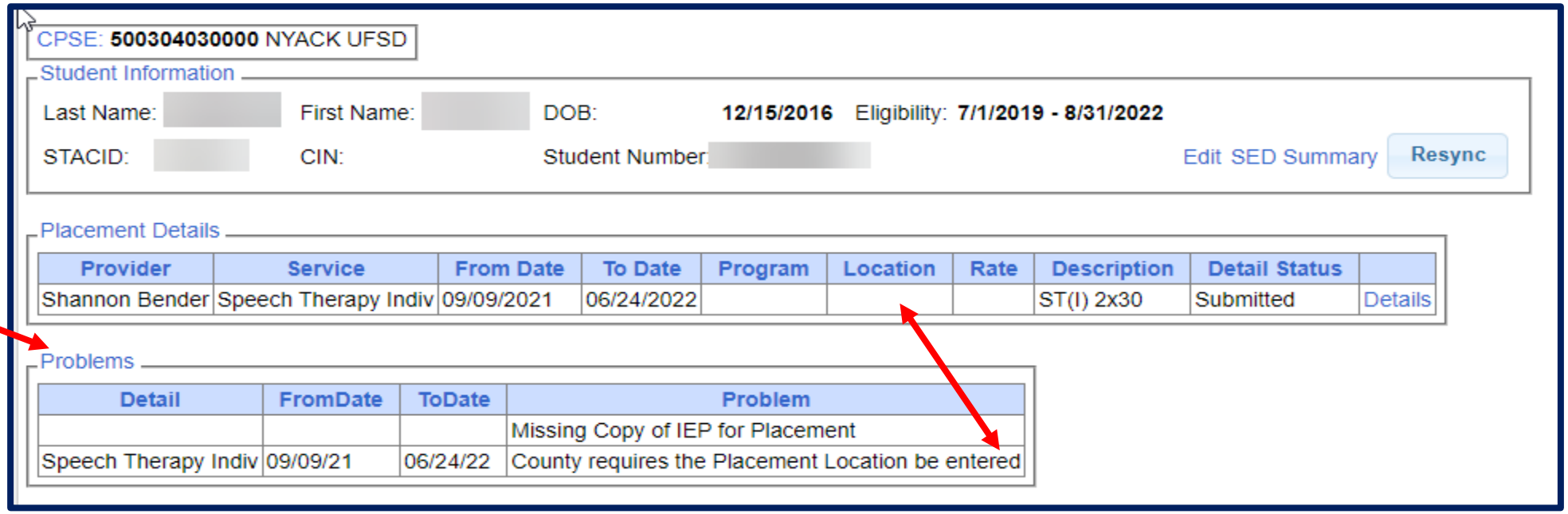
Excel

Unsubmitted Placements

Student #	STACID	Last Name	First Name	School Year Session	District Name	Placement Type	Details	Status
5000042000	I13868	[redacted]	WALKER	2021 - 2022 Summer	NYACK UFSD	CB	07/06/2021-08/13/2021 ARC -- PRIME TIME FOR KIDS-9100(A)	Problems Found
5000038989	I67321	[redacted]	FREDRIC	2021 - 2022 Winter	NYACK UFSD	SEITRS	09/09/2021-06/24/2022 RS (ST(I))	Problems Found
5000038605	J67230	[redacted]	SON	2021 - 2022 Winter	NYACK UFSD	CB	10/06/2021-06/24/2022 A STARTING PLACE-9100(J)	Problems Found
5000067354		[redacted]	MARCELO	2022 - 2023 Winter	NYACK UFSD	SEITRS	01/11/2023-06/23/2023 RS (OT(I))	Problems Found
5000038666	J37634	[redacted]	RILEY	2021 - 2022 Summer	NYACK UFSD	CB	07/06/2021-08/13/2021 ARC -- PRIME TIME FOR KIDS-9100(A)	Problems Found
5000038666	J37634	[redacted]	RILEY	2021 - 2022 Winter	NYACK UFSD	CB	09/10/2021-06/24/2022 ARC -- PRIME TIME FOR KIDS-9100(I)	Problems Found
5000038632	J37624	[redacted]	ISAIAH	2021 - 2022 Summer	NYACK UFSD	CB	07/12/2021-08/20/2021 Jawonio-9165(A)	Problems Found
5000038632	J37624	[redacted]	ISAIAH	2021 - 2022 Winter	NYACK UFSD	CB	09/13/2021-06/24/2022 Jawonio-9100(R)	Problems Found
5000038484	I67318	[redacted]	FRANCINE	2021 - 2022 Winter	NYACK UFSD	SEITRS	09/09/2021-06/24/2022 RS (ST(G), ST(I))	Problems Found
5000041863	I57328	[redacted]	STEPHINE	2021 - 2022 Summer	NYACK UFSD	CB	07/06/2021-08/13/2021 ARC -- PRIME TIME FOR KIDS-9100(A)	Problems Found
5000039112	J48646	[redacted]	BRENT	2021 - 2022 Winter	NYACK UFSD	CB	09/13/2021-06/24/2022 Head Start of Rockland-9160(I)	OK to Submit

UnSubmitted Placements – Problems Found

* In the example below:
  * The IEP needs to be uploaded,
  * And the ST services is missing a location.



CPSE: **500304030000** NYACK UFSD

Student Information

Last Name: [redacted] First Name: [redacted] DOB: **12/15/2016** Eligibility: **7/1/2019 - 8/31/2022**

STACID: [redacted] CIN: Student Number: [redacted] Edit SED Summary Resync

Placement Details

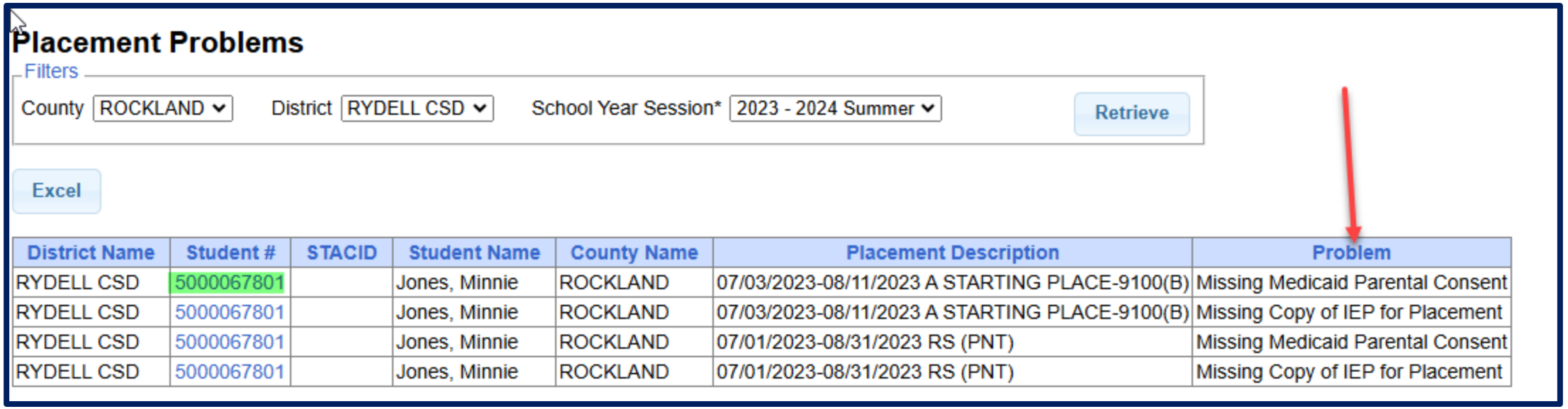
Provider	Service	From Date	To Date	Program	Location	Rate	Description	Detail Status	
Shannon Bender	Speech Therapy Indiv	09/09/2021	06/24/2022				ST(I) 2x30	Submitted	Details

Problems

Detail	FromDate	ToDate	Problem
			Missing Copy of IEP for Placement
Speech Therapy Indiv	09/09/21	06/24/22	County requires the Placement Location be entered

Placement Problems Report

* You can also review issues with why you cannot sign & submit.
* Go to ***eSTACs -> Reports -> Placement Problems.***



Placement Problems

Filters

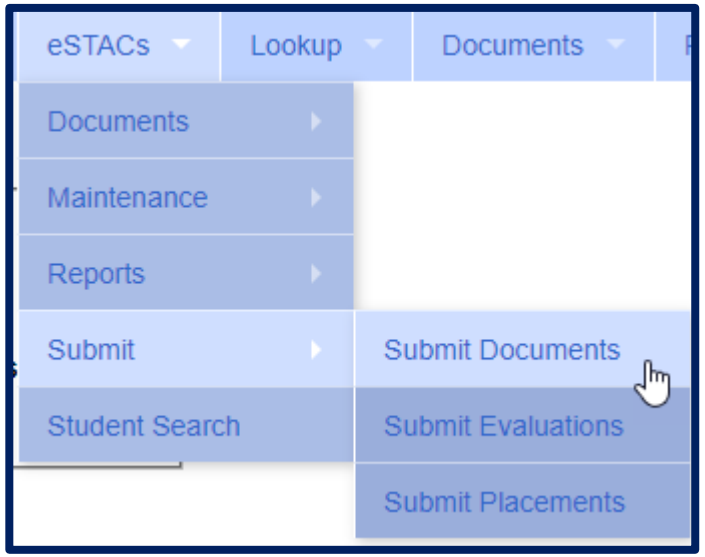
County ROCKLAND | District RYDELL CSD | School Year Session* 2023 - 2024 Summer | Retrieve

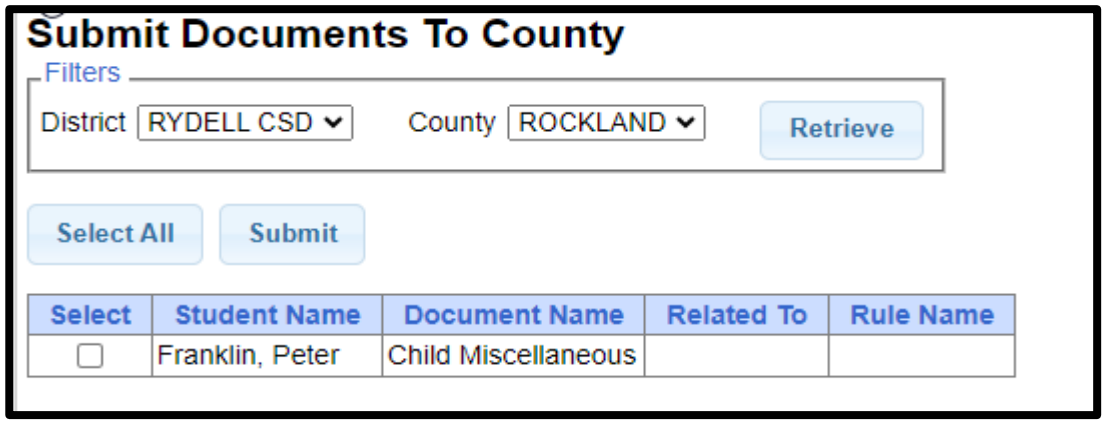
Excel

District Name	Student #	STACID	Student Name	County Name	Placement Description	Problem
RYDELL CSD	5000067801		Jones, Minnie	ROCKLAND	07/03/2023-08/11/2023 A STARTING PLACE-9100(B)	Missing Medicaid Parental Consent
RYDELL CSD	5000067801		Jones, Minnie	ROCKLAND	07/03/2023-08/11/2023 A STARTING PLACE-9100(B)	Missing Copy of IEP for Placement
RYDELL CSD	5000067801		Jones, Minnie	ROCKLAND	07/01/2023-08/31/2023 RS (PNT)	Missing Medicaid Parental Consent
RYDELL CSD	5000067801		Jones, Minnie	ROCKLAND	07/01/2023-08/31/2023 RS (PNT)	Missing Copy of IEP for Placement

Submitting Documents - After Placements Have Been Submitted

* Any documents that have been uploaded after you have signed & submitted the placement, must now be submitted to the County.
* Go to ***eSTACs -> Submit -> Submit Documents.***
* This will bring up a list of documents that you have uploaded into eSTACs after you signed/submitted the placement.
* Now select the documents and click the *Submit* button.





Should you have any questions or run into any problems, please send an email to the eSTACs Help Desk at:

eSTACs@CPSEPortal.com

Please include your school district and remember to use either the child's STAC ID or Student # in the email. Please do not include the child's name.

Thank you