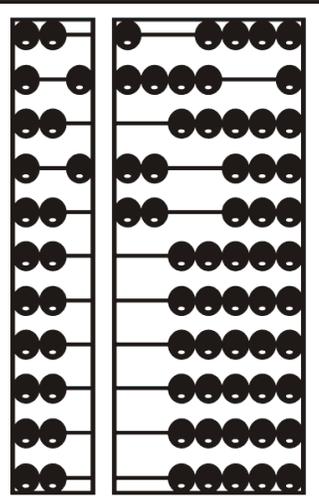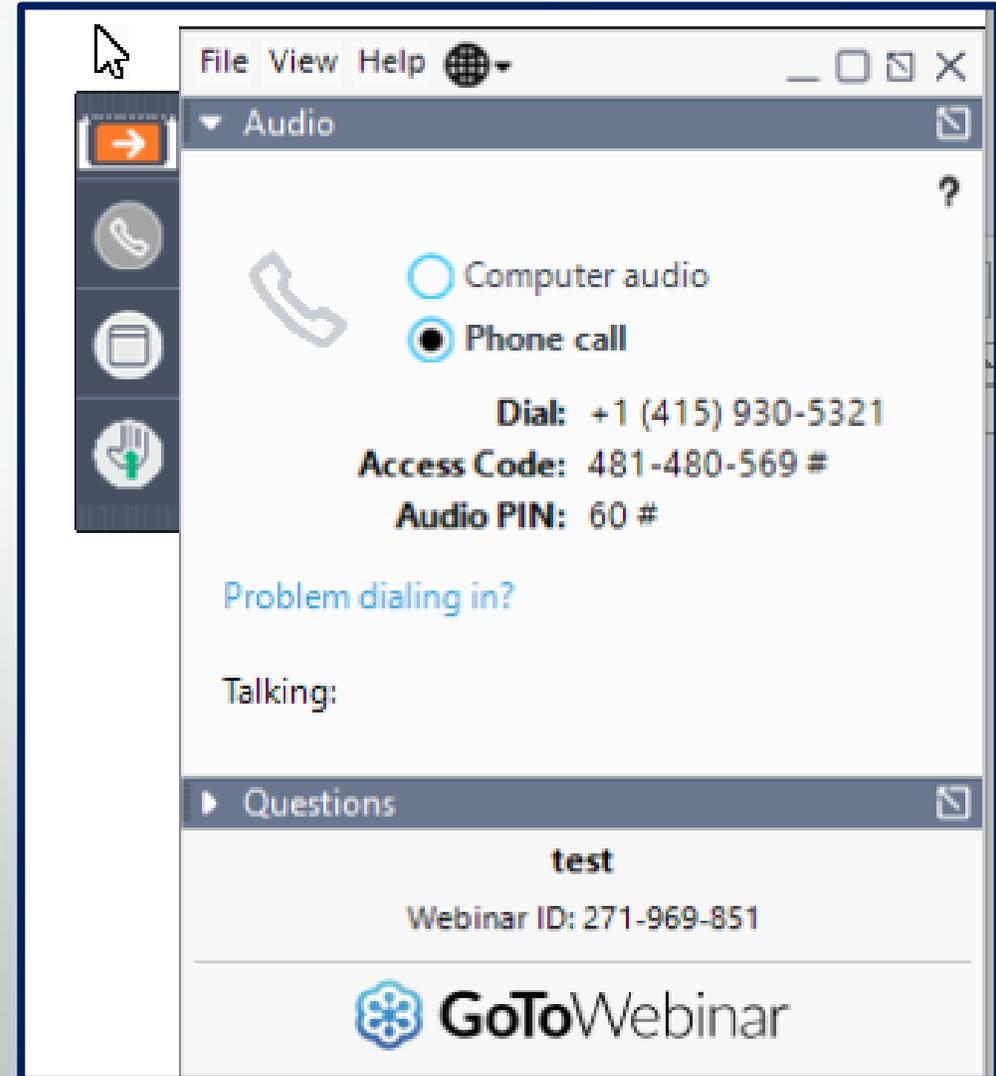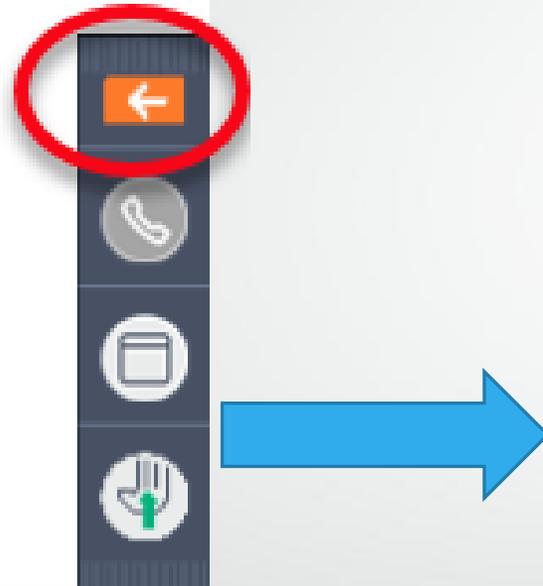JAMES McGUINNESS & ASSOCIATES INC. Consultants

Using Go To Webinar

Go To Webinar Control Panel

- Control panel is on far right of screen

- Orange button with white arrow expands and shrinks control panel
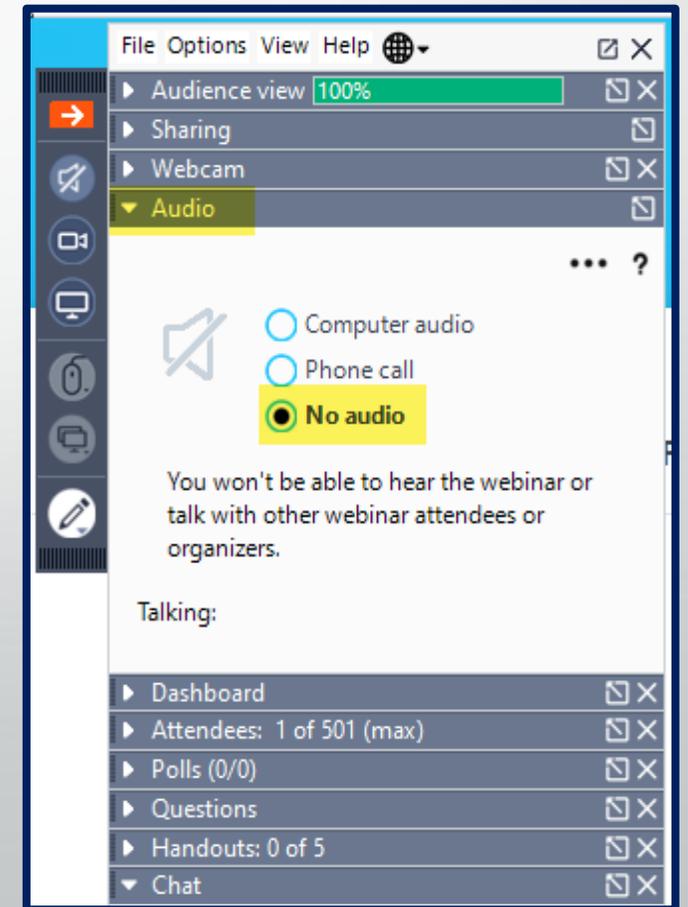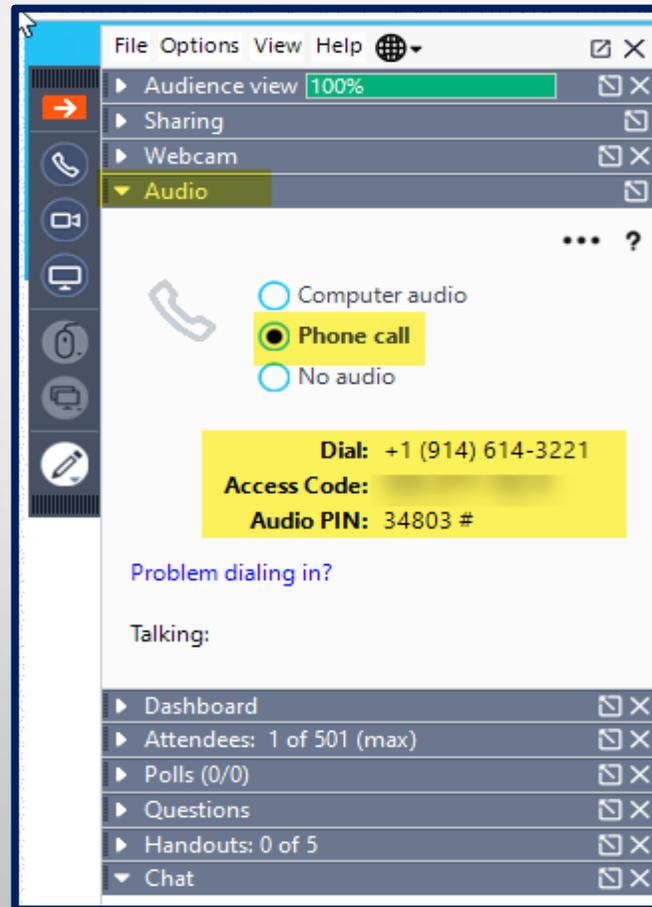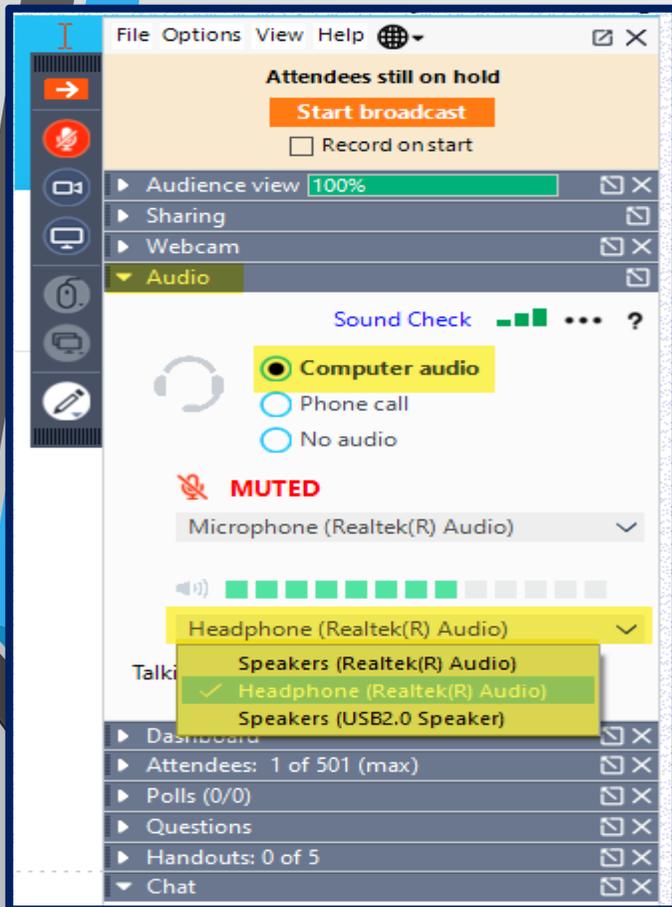
Communicating with Presenter

- All participants are on mute.

- You can raise your hand in response to a question we ask. Do not raise your hand to ask a question.

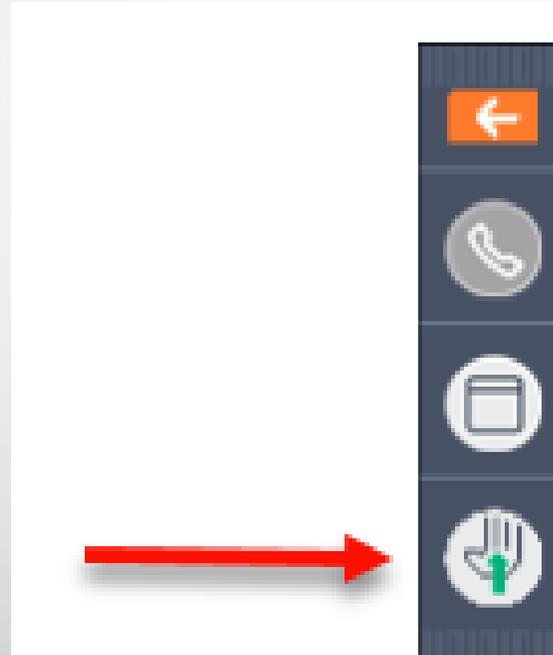- You can type in question in the question box.

Can't Hear the Webinar?

- Under the Audio tab, you can choose Computer Audio, Phone Call or No Audio. If you choose **No Audio**, you will not be able to hear the webinar!
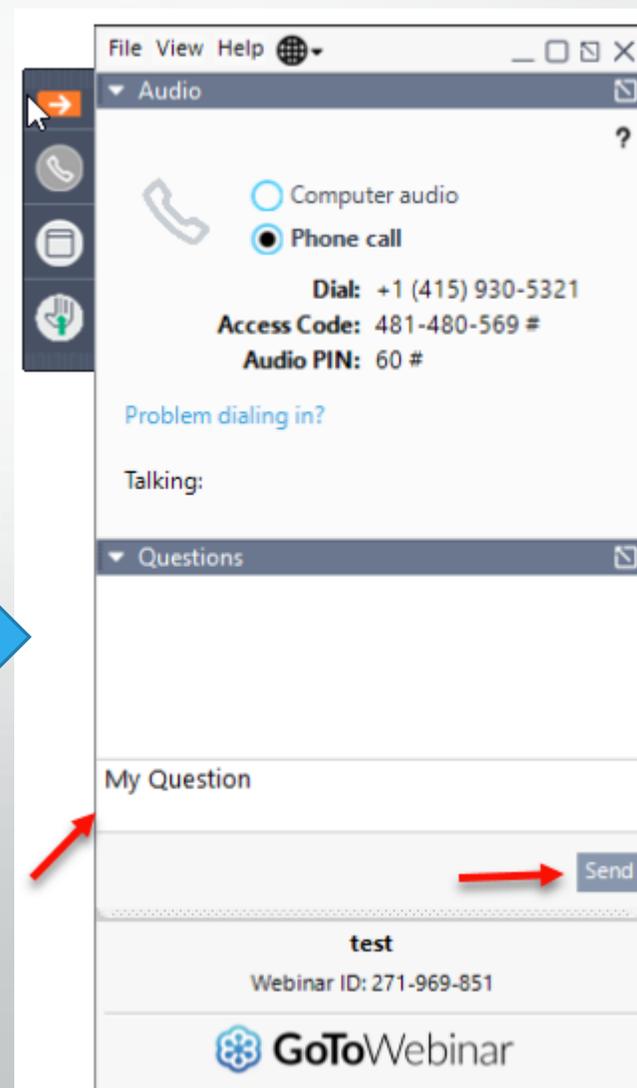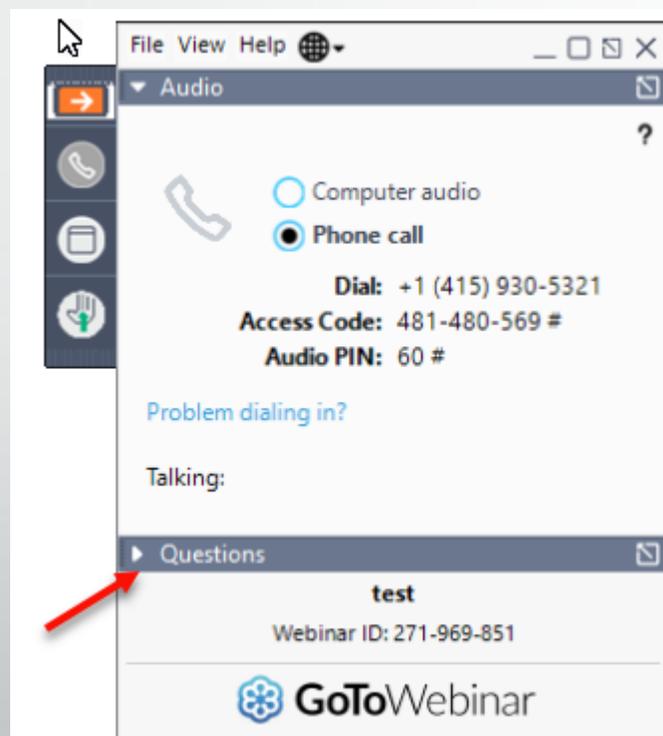
Raising your hand

- On bottom left of control panel is a button with a hand icon.

- Click that button to raise your hand.

Typing in a Question

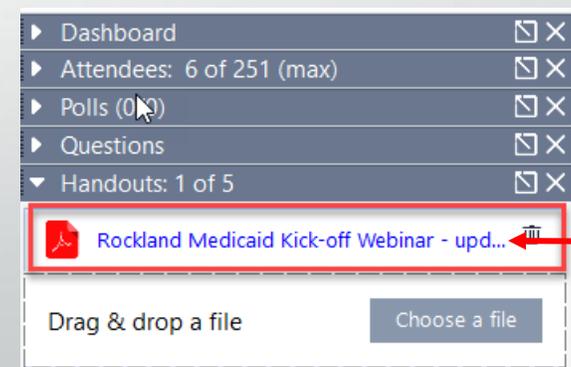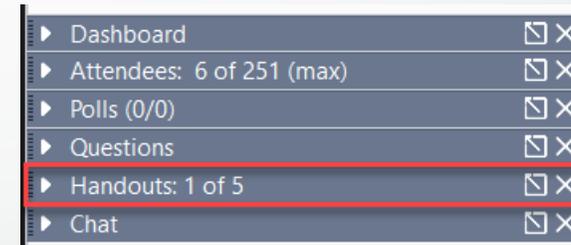- Click the question bar to expand questions section.
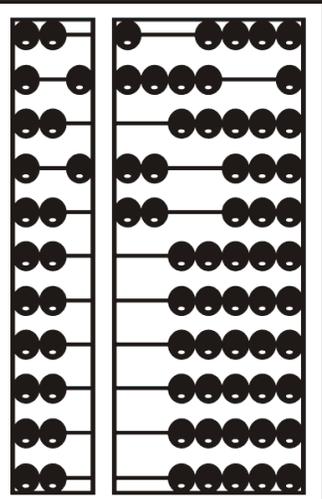
- Type in your question and click send.

Handouts

If you would like to download the handout:

- Click the "Handouts" icon on the control panel.

- Click the link for the handout that you would like to download.

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Preschool Maintenance Items
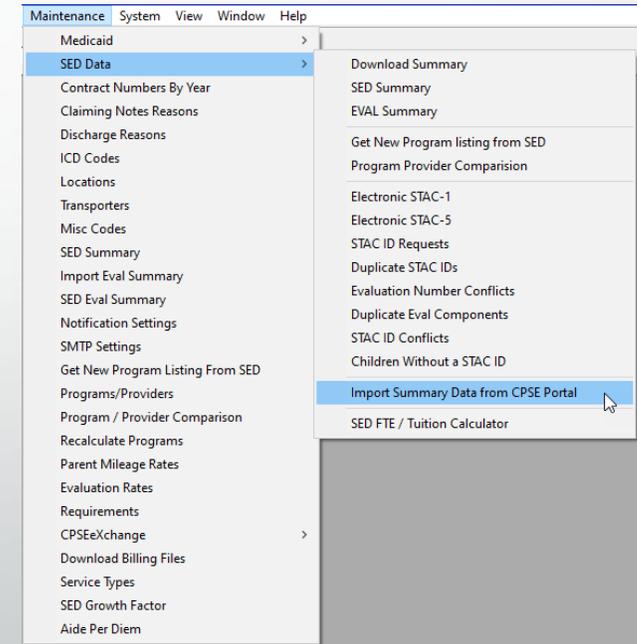
Importing Summary Files

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Summary Files – STAC 1 and STAC 5

- Summary files contain the approved STAC 1's and STAC 5's for your county.
- Importing them on a regular basis is an important step to ensuring your records in Preschool match SED's records.

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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.

Importing Summary Files

- 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

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# Importing Program Listing from SED (Agency Files)

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Importing Program Listing from SED

- The Program Listing contains the Programs and Providers approved by SED.

- When SED changes the program rate, dates, hours per day, days per week, etc. Those changes need to be brought into Preschool
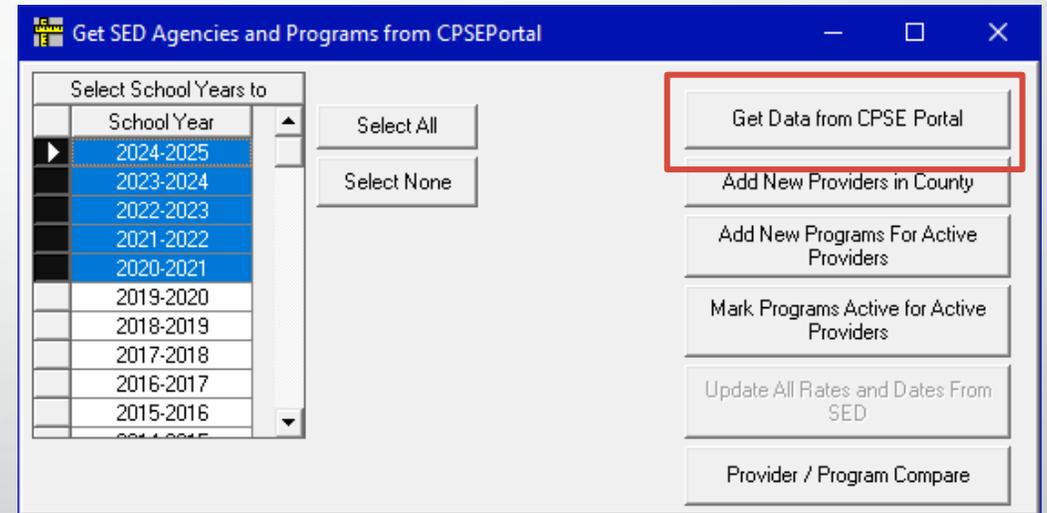
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Importing Program Listing

- Maintenance > SED Data > 'Get New Program Listing from SED.'

- This process should be completed every week.
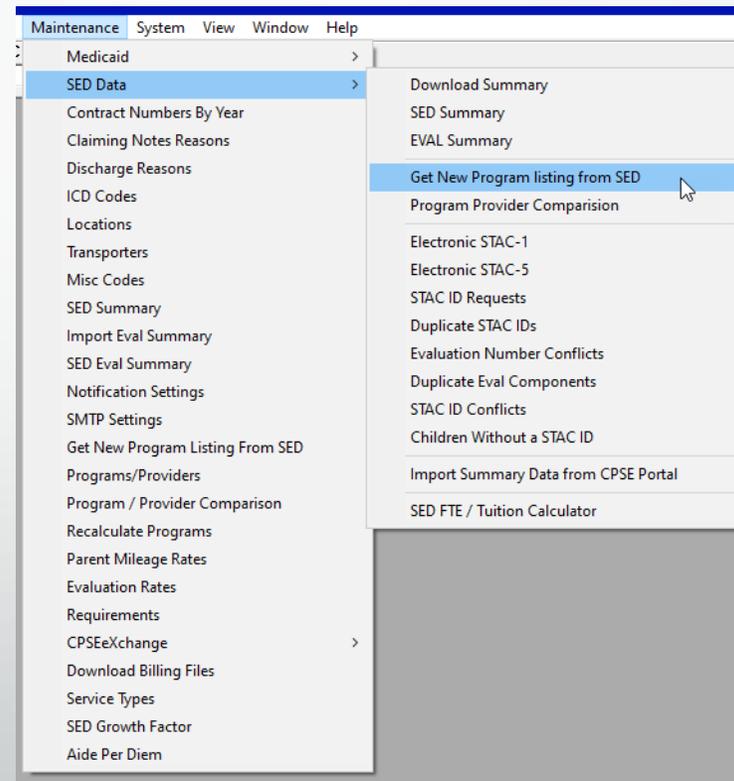
Importing Program Listing

- Start by selecting the school year(s) you want to import. You can select multiple years or just one.

- Default selects last 5 years

- 'Get Data from CPSE Portal'

Importing Program Listing

- 'Add new Programs for Active Providers'
- 'Mark Programs Active for Active Providers'
- 'Add New Providers in County'
- 'Provider/ Program Compare'

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Compare Program & Provider Listings

- Provider Additions/Deletions
- Provider Changes
- Program Additions/Deletions
- Program Changes

Compare Program & Provider Listings

Provider Additions / Deletions	Provider Changes	Program Additions / Deletions	Program Changes

Provider Additions/ Deletions

- Contains any new providers from SED as well as any providers that are no longer valid according to SED.

- If you clicked 'Add New Providers in County', there will be no providers to add

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Provider Changes

- Flags differences between SED and the County

- 'Update Selected Providers' for any changes.

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Program Additions/ Deletions

- Displays New SED programs as well as Invalid SED programs.

- If you clicked the 'Add New Programs for Active Providers', there will be no new programs to add.

- Any new programs can be manually selected and added.

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Program Additions/ Deletions cont.

- The Invalid SED Programs section will display programs that are no longer valid.
- These can be deleted with 'Delete Selected County Programs'.
- We do not recommend deleting programs.

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Program Changes

- Displays any changes that SED has made to programs that exist in your Preschool Program

- Changes are highlighted in yellow and can include changes to rate, dates, and hours.

- Manually select and confirm with 'Update Select Program Changes.'

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Additional Notes

- Unused providers can be marked as inactive to avoid displaying in these screens.

- 'Print Program Changes' will create a report of all available program changes.

- Once you import program changes, you may receive a prompt that states 'Some Programs need to be Recalculated'

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Recalculating Programs

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Recalculate Programs

- This only needs to be done if you receive the prompt 'Some Programs need to be recalculated.'

- Maintenance> Recalculate Programs
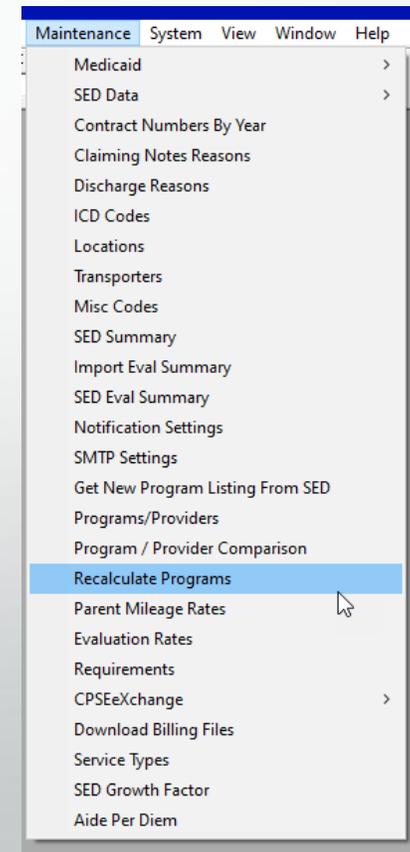
Recalculate Programs

- Any programs that need to be recalculated will appear on the 'Recalculation List' tab.

- To recalculate programs, select them and then click the 'Recalc' button.

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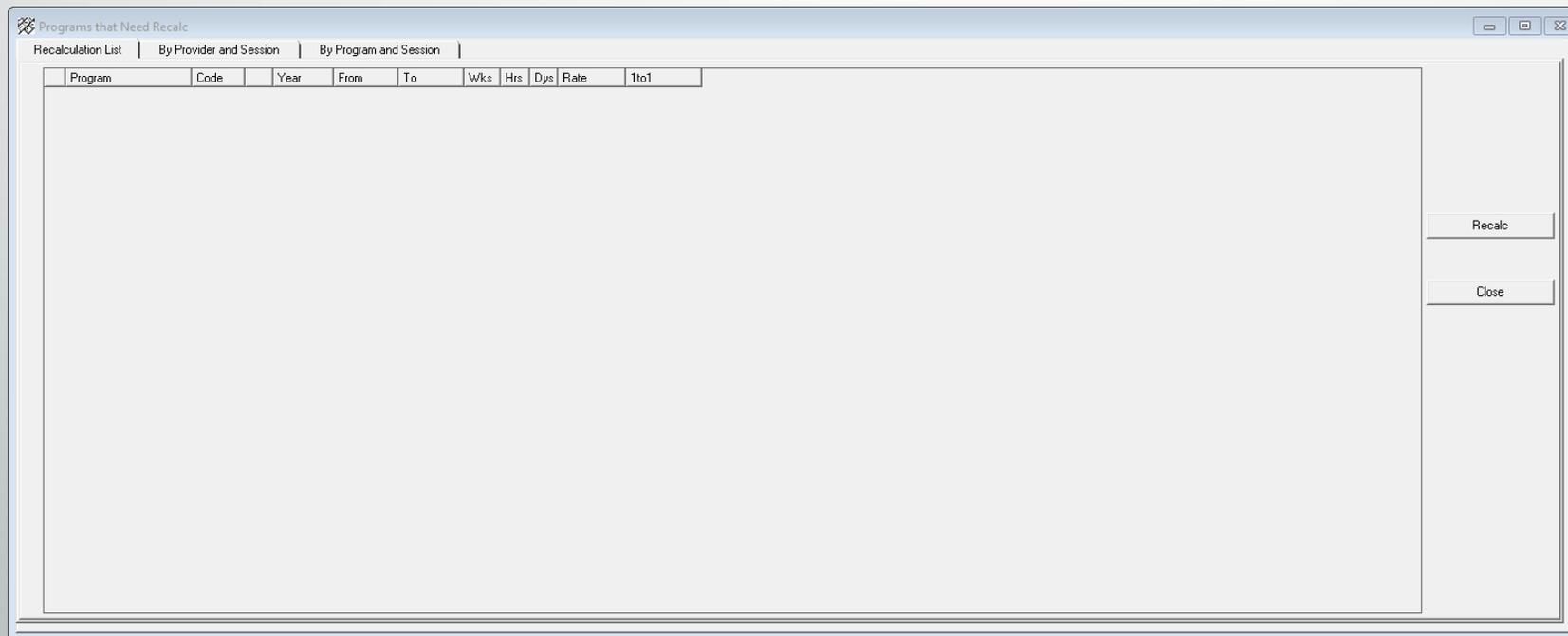
Agency Rate Adjustment

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Agency Rate Adjustments

- If the programs you imported have any rate changes the final step is to process the agency rate adjustment.

- To do this go to the Payments tab and click on Agency Rate Adj.
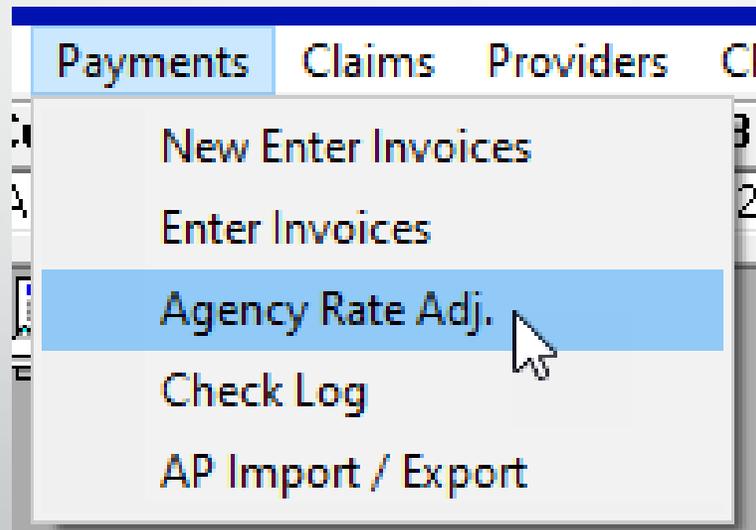
Agency Rate Adjustments

- All programs with rate changes (regardless of the Current Session) will display here.

- You can select them individually or click Select all

- You can then click 'Update Rates'

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Update Code Tables

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Update Code Tables

- Code Tables in Preschool include, ICD Codes, CPT Codes, STAC Rejection Codes, etc.

- To get to the Update Code tables screen go to the CPSE Portal tab and click on Update Code Tables

- Even if you do not use CPSE Portal you can use this function to update your code tables.
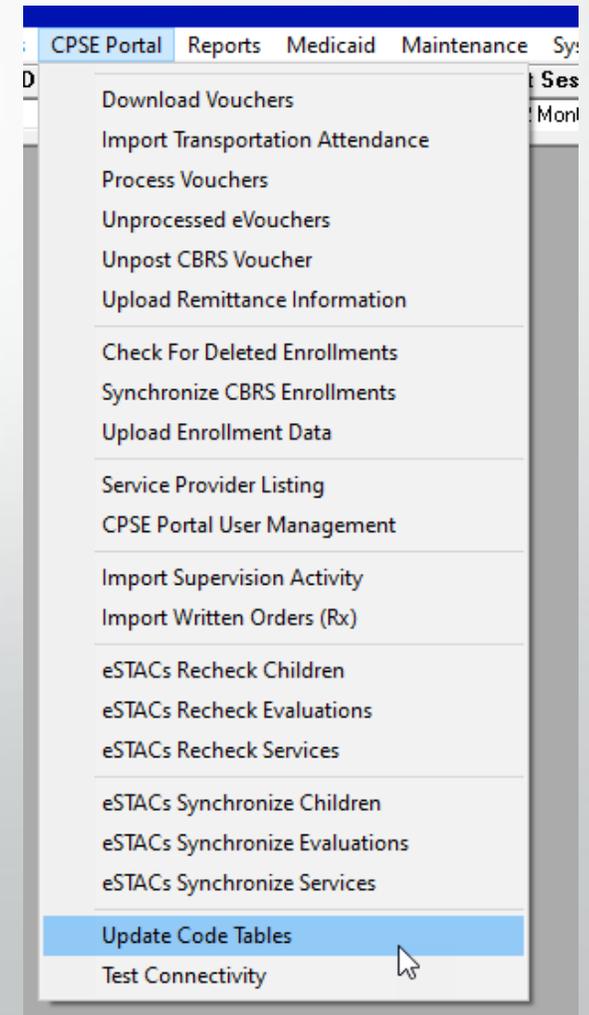
Update Code Tables

- The top group are Medicaid Codes, including Rejection and Denial Reasons, CPT and ICD codes, as well as the Medicaid Cycle Calendar

- The next group is the Service Settings Codes

- eSTAC's Service types (Only eSTAC's counties)

- The next category is Profession Codes

- The last group is SED Data, STAC 1 and STAC 5 Error Codes

- To update your code tables simply click the button that corresponds to what you want to update.

Update Code Tables

Medicaid
- Rejection Reasons
- CPT, Rate Codes and Rates
- Medicaid Cycle Calendar
- Denial Reasons
- Popular ICD 10 Codes

Settings / Location
- Service Settings

eSTACs
- Service Types

Profession Codes
- Profession Codes

SED Data
- Related Service Types
- STAC 1 Error Codes
- Eval Service Types
- STAC-5 Error Codes

Close
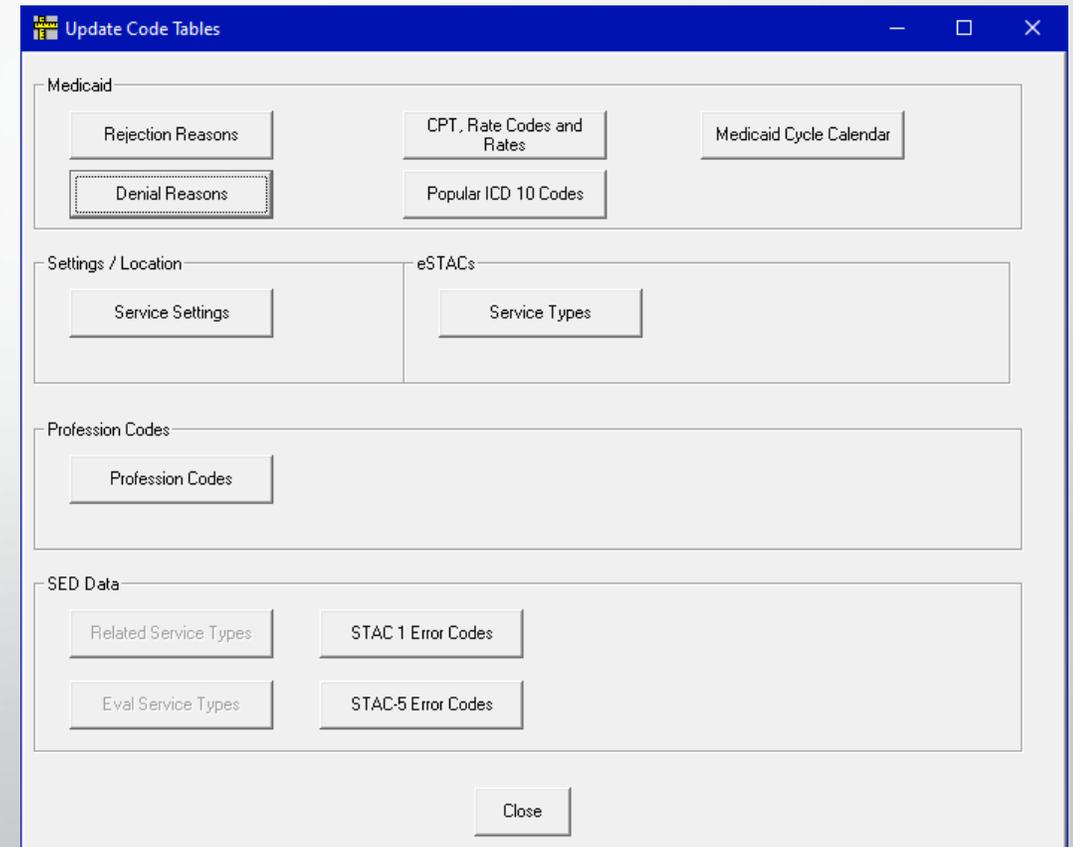
Uploading Enrollment Data to CPSE Portal

- To upload enrollment data to CPSE Portal, in Preschool go to the CPSE Portal tab and select Upload Enrollment data
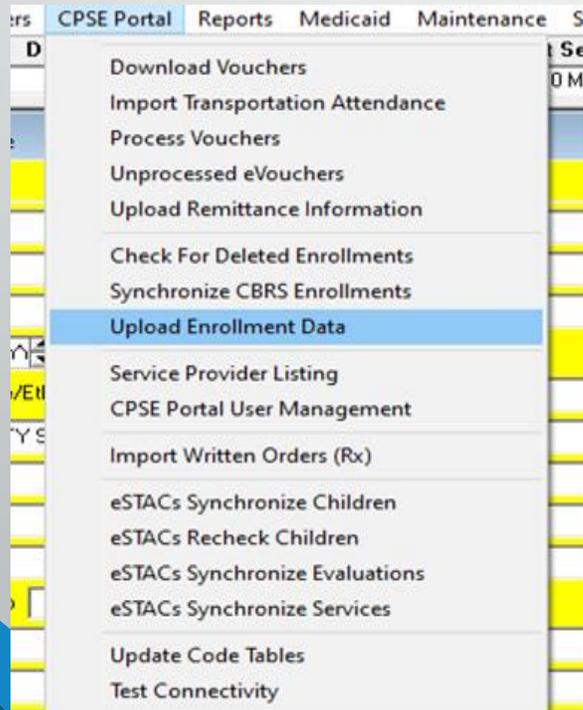
- Ensure the dates are correct in the Data filters screen and then click Upload.
- A pop up will display letting you know that the upload was completed and will notify you of any errors.
- If you need to upload for multiple school years you can switch between school years after each upload.

Closing

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Preschool 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 CPSE Portal or you can go to:

- *http://support.cpseportal.com/kb*

Preschoolsupport@CPSEPortal.com
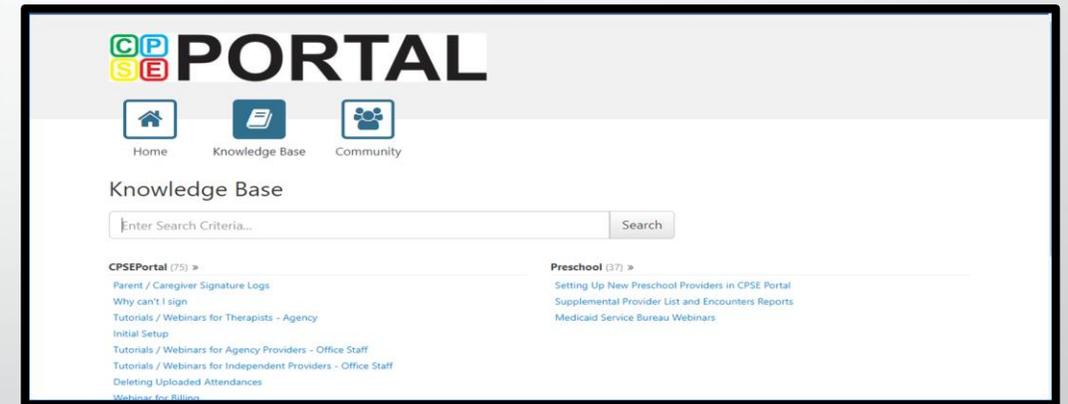
Knowledge Base Articles

- Importing Summary Files
  - https://support.cpseportal.com/kb/a115/importing-sed-summary-file-stac-eval-into-preschool.aspx

- Update SED Program Listing
  - https://support.cpseportal.com/kb/a116/update-sed-program-listing-includes-rate-changes.aspx

- Update Code Tables
  - http://support.cpseportal.com/kb/a137/updating-code-tables.aspx#

- Upload Enrollment data to CPSE Portal
  - https://support.cpseportal.com/kb/a117/uploading-data-to-cpse-portal.aspx

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Closing Remarks

- If you need assistance with Preschool the Preschool Helpdesk is available through email at preschoolsupport@cpseportal.com

  - When you send us an email:

    - Do **not** use child's name

    - Use ESID #, Child # or STAC ID #

  - Include any error or warning messages you received

Preschoolsupport@CPSEPortal.com