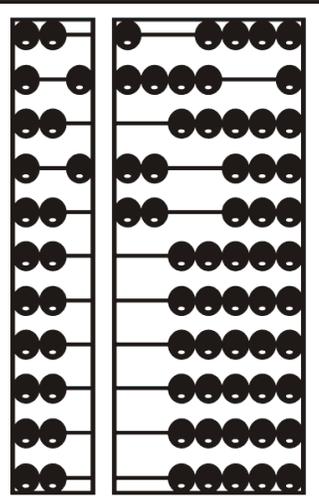


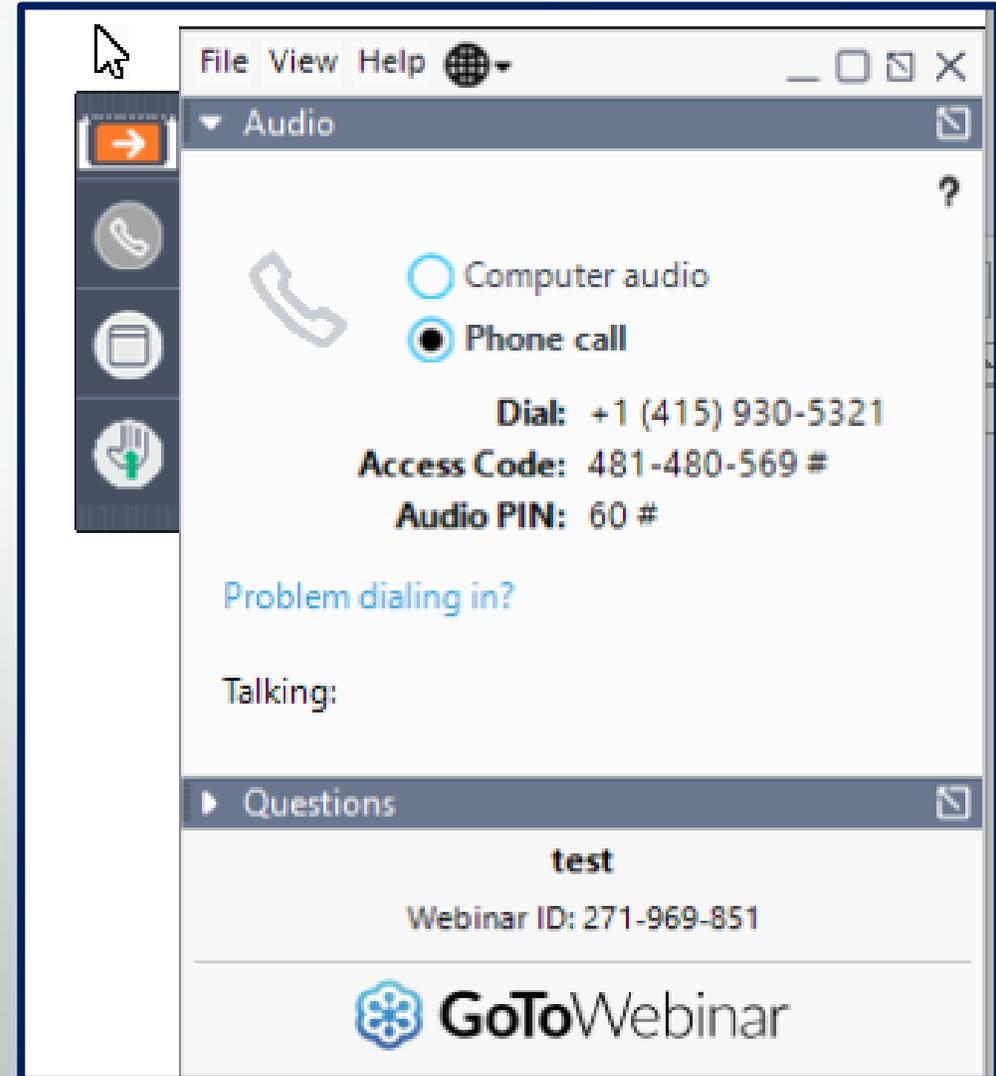
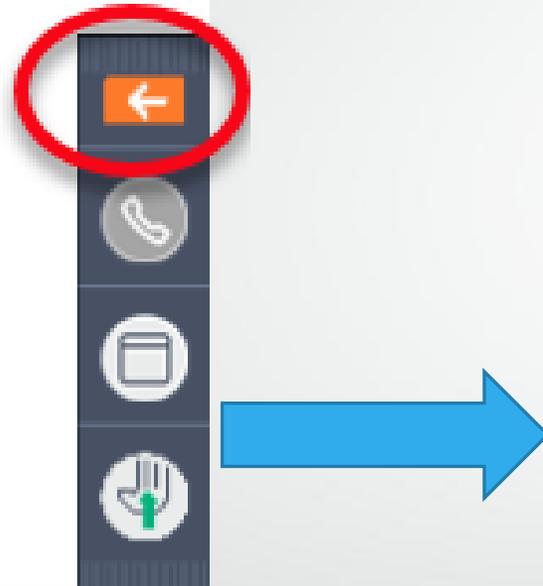
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& ASSOCIATES INC.  
Consultants



# 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

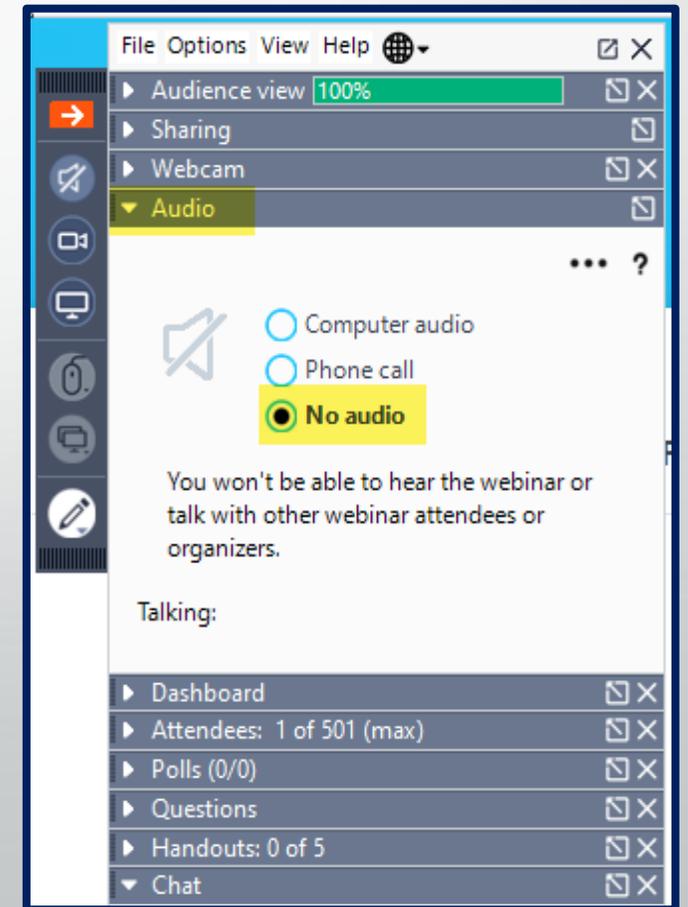
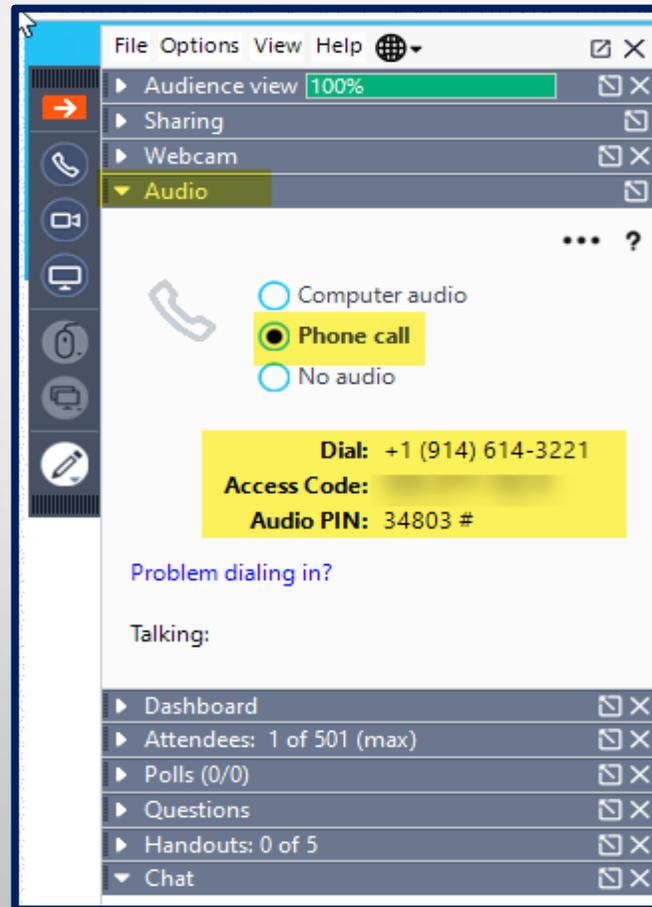
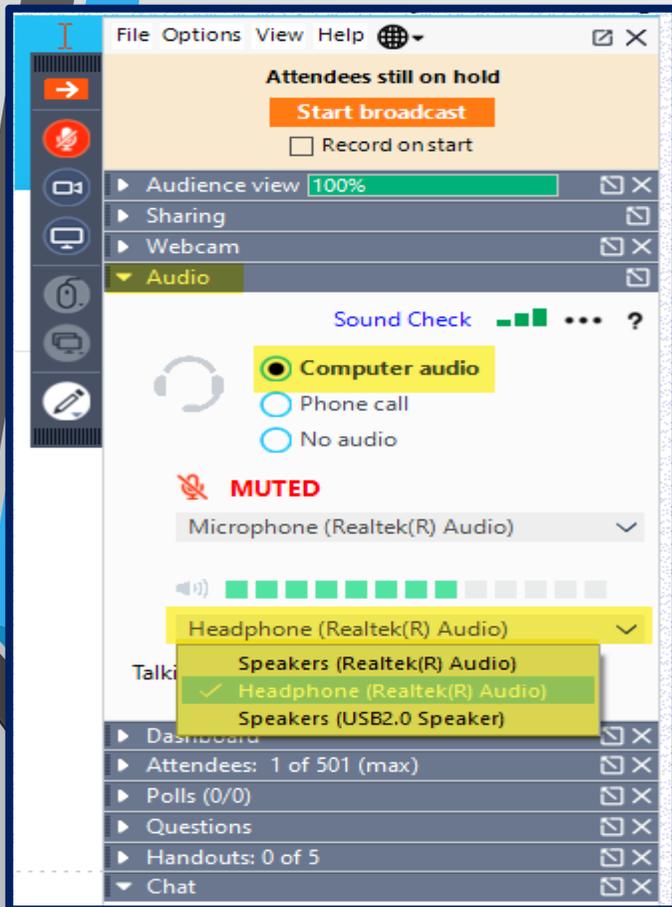


# Communicating with Presenter

- 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.

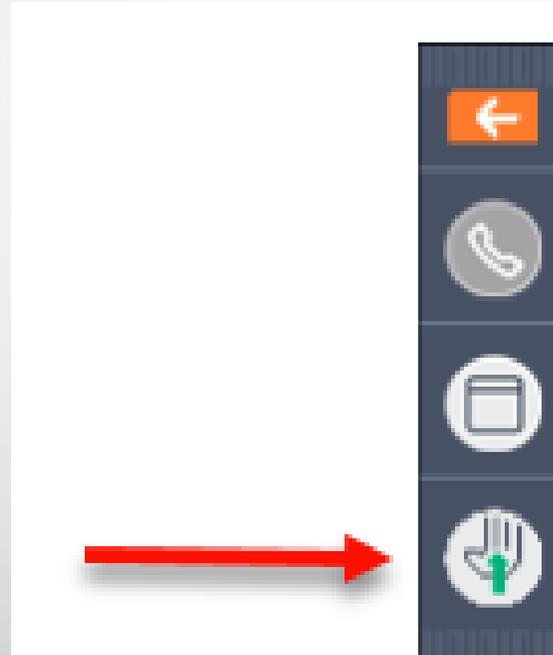
# Can't Hear the Webinar?

- 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

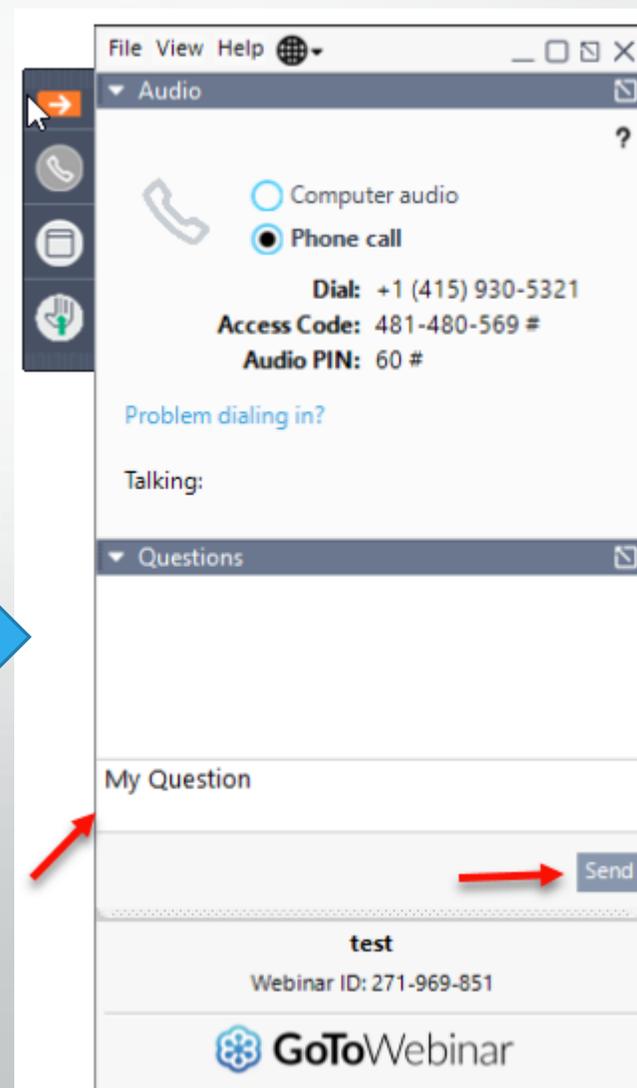
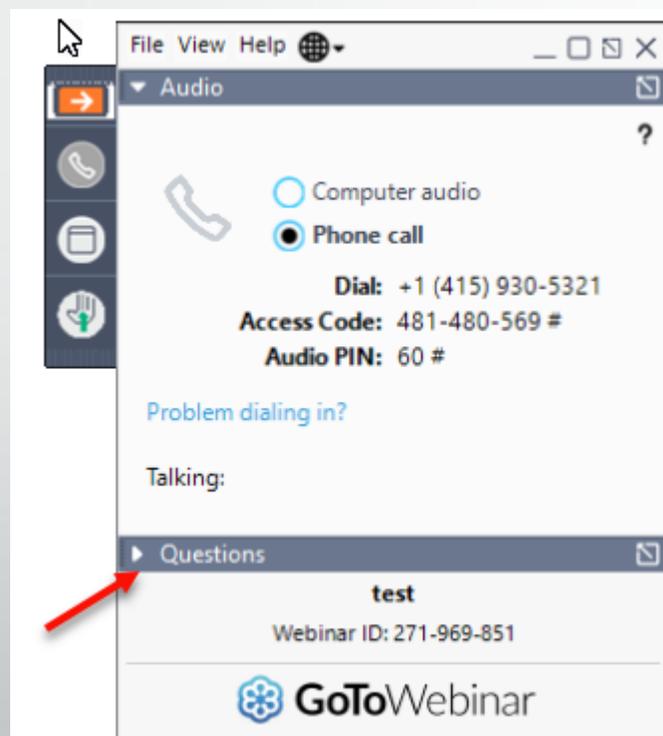
- On bottom left of control panel is a button with a hand icon.
- Click that button to raise your hand.



# Typing in a Question

- Click the question bar to expand questions section.

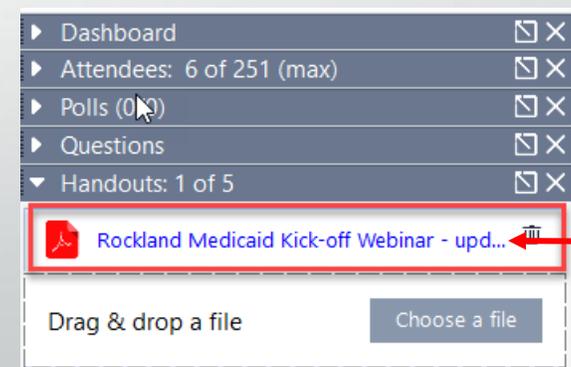
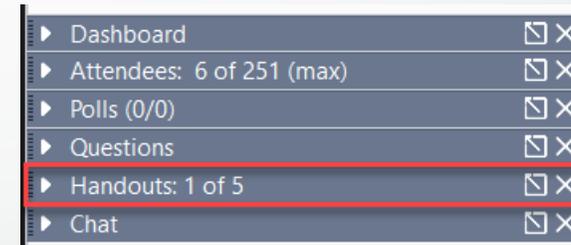
- Type in your question and click send.



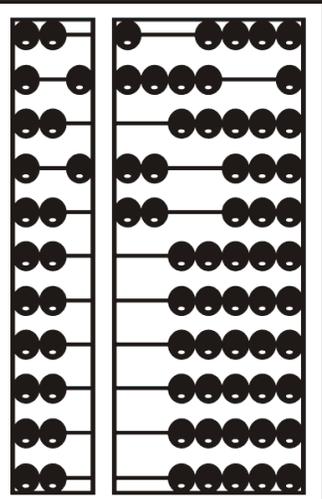
# Handouts

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

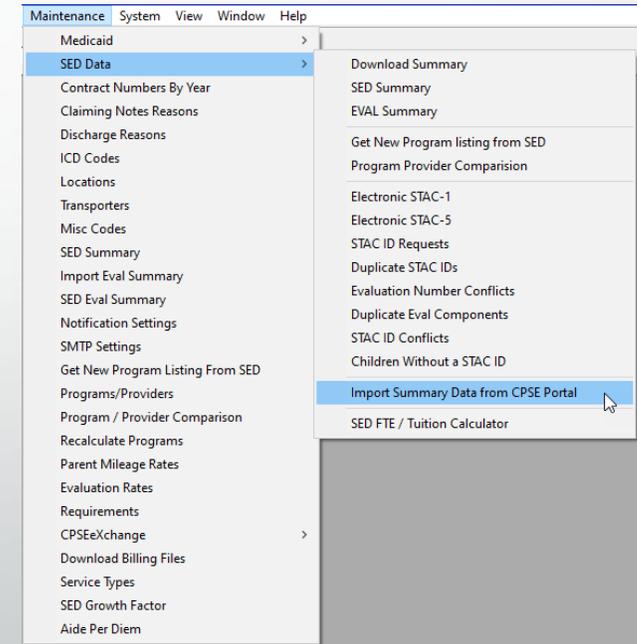
[Preschoolsupport@CPSEPortal.com](mailto:Preschoolsupport@CPSEPortal.com)

# 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.

# 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

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)



# **Importing Program Listing from SED (Agency Files)**

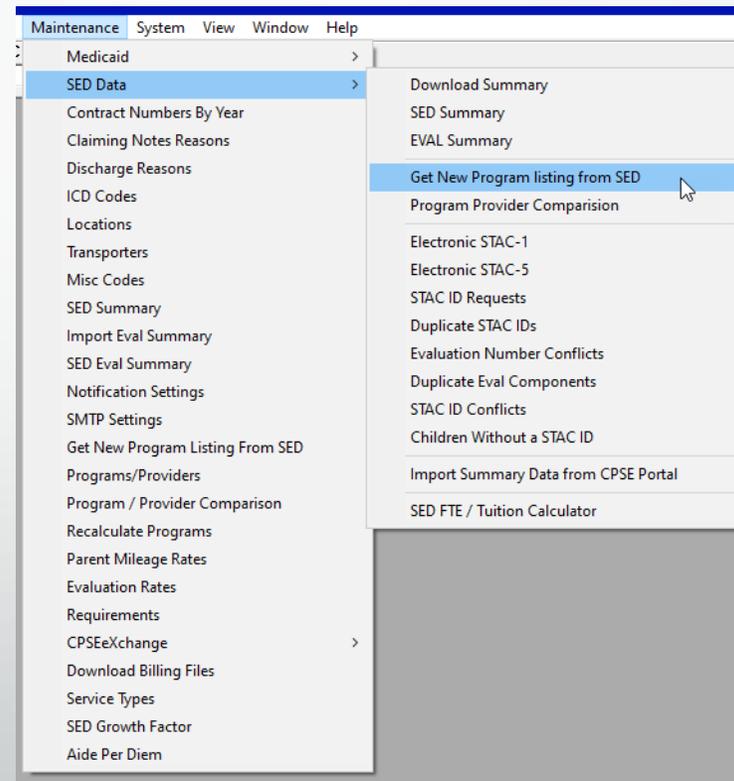
Preschoolsupport@CPSEPortal.com

# 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

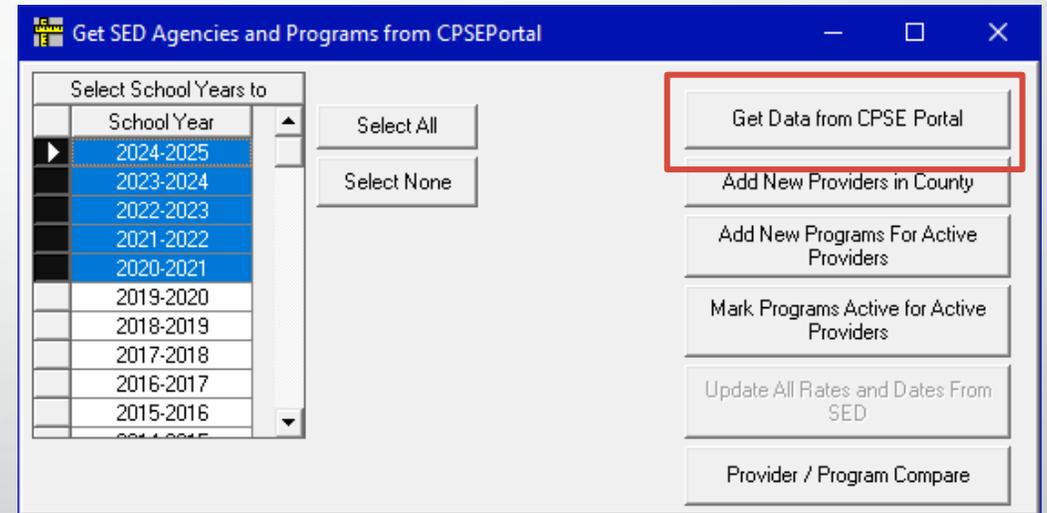
# Importing Program Listing

- 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’

Get SED Agencies and Programs from CPSEPortal

Select School Years to	
	School Year
<input checked="" type="checkbox"/>	2024-2025
<input checked="" type="checkbox"/>	2023-2024
<input checked="" type="checkbox"/>	2022-2023
<input checked="" type="checkbox"/>	2021-2022
<input checked="" type="checkbox"/>	2020-2021
<input type="checkbox"/>	2019-2020
<input type="checkbox"/>	2018-2019
<input type="checkbox"/>	2017-2018
<input type="checkbox"/>	2016-2017
<input type="checkbox"/>	2015-2016
<input type="checkbox"/>	2014-2015

Select All  
Select None

1 Get Data from CPSE Portal  
2 Add New Providers in County  
3 Add New Programs For Active Providers  
4 Mark Programs Active for Active Providers  
Update All Rates and Dates From SED  
Provider / Program Compare

# 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

The screenshot shows a software window titled "Compare Program & Provider Listings" with a menu bar containing "Provider Additions / Deletions", "Provider Changes", "Program Additions / Deletions", and "Program Changes". The window displays two tables:

**New SED Providers**

SEDProviderCode	ProviderName	Evaluator
020101040000	ALFRED-ALMOND CSD	Y
020801040000	ANDOVER CSD	Y
020702640003	ALLEGANY CO DEPT SOCIAL SERVICES	Y
020702640007	ALLEGANY CO HEALTH DEPT	Y
020702950001	ALLEGANY CO SHERIFF C/O TREASURER	Y
020801040000	BELFAST CSD	Y
021102040000	CANASERAGA CSD	Y
022801630003	APC ALLEGANY	Y
022902040000	BOLIVAR-RICHBURG CSD	Y
040302060000	ALLEGANY-LIMESTONE CSD	Y
042302040000	CATTARAUGUS-LITTLE VALLEY CSD	Y
042302950001	CATTARAUGUS COUNTY JAIL	Y
042400640007	CATTARAUGUS CO DEPT SOCIAL SERVICES	Y
042400997707	CATTARAUGUS REHAB CENTER	Y
043001040000	RANDOLPH CSD	Y
140201060000	AMHERST CSD	Y
140201996529	AUTISM SERVICES INC - AMHERST	N
140201996063	EMC LEARNING CENTER	Y
140202000000	AUTISM SERVICES INC	N

**Invalid SED Providers**

ProviderCode	ProviderName	Evaluator
140709997805	UCP OF WESTERN NY	Y

Buttons on the right side of the window include "Add Provider To County List" and "Delete From County List".

# Provider Changes

- Flags differences between SED and the County
- 'Update Selected Providers' for any changes.

The screenshot shows a software window titled "Compare Program & Provider Listings" with a menu bar containing "Provider Additions / Deletions", "Provider Changes", "Program Additions / Deletions", and "Program Changes". The main area displays a table titled "Differences Between SED Provider and County Provider" with the following columns: "ProviderCode", "ProviderName", "SEDEval", and "CountyEval". The table is currently empty. At the bottom of the window, there is a button labeled "Update Selected Providers".



# 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.

The screenshot shows a software window titled 'Compare Program & Provider Listings'. The 'Invalid SED Programs' section is active, displaying a table with the following columns: ProviderName, ProviderCode, SchoolYear, Code, St, FromDate, ToDate, Rate, 1to1 Rate, Hours Per Day, and Days Per Week. A 'Delete Selected County Programs' button is visible on the right side of the table.

ProviderName	ProviderCode	SchoolYear	Code	St	FromDate	ToDate	Rate	1to1 Rate	Hours Per Day	Days Per Week
BUILDING BLOCKS	671002040000	201415	9200	1	7/1/2014	8/31/2014	50	0		
BUILDING BLOCKS	671002040000	201415	9200	2	9/1/2014	6/30/2015	50	0		
LEAg - HANDI CTR-	141101998103	202526	9101	G	7/7/2025	8/15/2025	5956	11463.2998	5	5
BUILDING BLOCKS	671002040000	201516	9200	2	9/1/2015	6/30/2016	50	0		
LIBERTY POST-DONT		202425	9135	T	7/1/2024	8/31/2025	0	0	0	0
BUILDING BLOCKS	671002040000	201617	9200	1	7/1/2016	8/31/2016	50	0		
AURORA AUDIOLOGY	671501640107	200102	9200	1	7/1/2001	8/31/2001	62	0	0	0
AURORA AUDIOLOGY	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0
FINLEY, ADAM	671501640107	200102	9200	1	7/1/2001	8/31/2001	62	0	0	0
FINLEY, ADAM	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0
GENESEE VALLEY	671501640107	200102	9200	1	7/1/2001	8/31/2001	51.12	0	0	0
HUMBERSTONE,	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0
LEAg - HANDI CTR-	671501640107	200102	9200	1	7/1/2001	8/31/2001	62	0	0	0
LEAg - HANDI CTR-	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0
LETCHEWORTH CSD	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0
ARC INC (GLOW)	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0
WYO CO COMM	671501640107	200102	9200	1	7/1/2001	8/31/2001	62	0	0	0
WYO CO COMM	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0
INTGRD THER SERV	671501640107	200102	9200	1	7/1/2001	8/31/2001	62	0	0	0
INTGRD THER SERV	671501640107	200102	9200	1	9/1/2001	6/30/2002	45	0	0	0
WASCAK, ELIZABETH	671501640107	200102	9200	1	7/1/2001	8/31/2001	62	0	0	0
CATON, DR JULIE	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0
GENESEE VALLEY	671501640107	200102	9200	1	7/1/2001	8/31/2001	49.94	0	0	0
GENESEE VALLEY	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0
GENESEE VALLEY	671501640107	200102	9200	1	9/1/2001	6/30/2002	62	0	0	0

# 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.'

Compare Program & Provider Listings

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

All Sessions  
 Only this Session

25-26 2 Month

All Providers  
 Only this Provider

ARC INC (GLOW)

Program Differences between SED and County

ProgramDescription				ProgramInfo								
ProviderName	SchoolYear	ProviderCode	Code	StacCode	SED CTY	SEDFront CTY	SEDToDa CTY	SEDRate CTY	SEDRate1tc CTY	SEDEHoursPer CTY	SEDDaysPer CTY	SEDWks CTY
LEITCHWORTH CSD	202122	167040104000	9135	T	SED	08/01/21	06/30/22	37	0	0	0	40
DANSVILLE CSD	202223	24100106000	9135	S	SED	07/01/22	08/31/22	41	0	0	0	9
DANSVILLE CSD	202223	24100106000	9135	T	SED	09/01/22	06/30/23	41	0	0	0	40
MARY CARIOLA CHILDRENS CTR	202223	26160099704	9100	A	SED	07/11/22	08/19/22	9663	3259	5	5	6
MARY CARIOLA CHILDRENS CTR	202223	26160099704	9100	B	SED	07/11/22	08/19/22	9589	3259	5	5	6
MARY CARIOLA CHILDRENS CTR	202223	26160099704	9100	J	SED	09/07/22	06/23/23	60490	0	5	5	39
MARY CARIOLA CHILDRENS CTR	202223	26160099704	9115	A	SED	07/11/22	08/19/22	4330	1630	2.5	5	6
MARY CARIOLA CHILDRENS CTR	202223	26160099704	9115	I	SED	09/07/22	06/23/23	25981	9778	2.5	5	39
BATAVIA CITY SD	202324	1803001000	9115	A	SED	07/03/23	08/11/23	3102	1731	2.5	5	6
BATAVIA CITY SD	202324	1803001000	9115	A	SED	07/03/23	08/11/23	2325	1731	2.5	5	6
BATAVIA CITY SD	202324	1803001000	9165	A	SED	07/03/23	08/11/23	3371	1731	2.5	5	6
MARY CARIOLA CHILDRENS CTR	202324	26160099704	9100	A	SED	07/10/23	08/18/23	9749	3463	5	5	6
MARY CARIOLA CHILDRENS CTR	202324	26160099704	9100	B	SED	07/10/23	08/18/23	10039	3463	5	5	6
MARY CARIOLA CHILDRENS CTR	202324	26160099704	9100	B	SED	07/10/23	08/18/23	9749	0	5	5	6
MARY CARIOLA CHILDRENS CTR	202324	26160099704	9115	A	SED	07/10/23	08/18/23	10039	0	5	5	6
MARY CARIOLA CHILDRENS CTR	202324	26160099704	9115	A	SED	07/10/23	08/18/23	5050	1731	2.5	5	6
MARY CARIOLA CHILDRENS CTR	202324	26160099704	9115	A	SED	07/10/23	08/18/23	4670	1731	2.5	5	6
SALAMANCA CITY SD	202324	04320005000	9135	S	SED	07/01/23	08/31/23	40	0	0	0	9
ERIE COUNTY MEDICAL CENTER	202425	14050089001	9135	S	SED	07/01/24	08/31/24	42	0	0	5	9
ERIE COUNTY MEDICAL CENTER	202425	14050089001	9135	T	SED	09/01/24	06/30/25	42	0	0	5	40
LACKAWANNA CITY SD	202425	1418001000	9160	I	SED	09/03/24	06/27/25	33388	21040	5	5	40
LEITCHWORTH CSD	202425	67040104000	9135	S	SED	07/01/24	08/31/24	0	0	0	5	9
LEITCHWORTH CSD	202425	67040104000	9135	S	SED	07/01/24	08/31/24	43	0	0	0	9
LEITCHWORTH CSD	202425	67040104000	9135	T	SED	09/01/24	06/30/25	0	0	0	5	40
LEITCHWORTH CSD	202425	67040104000	9135	T	SED	09/01/24	06/30/25	43	0	0	0	40
LEITCHWORTH CSD	202425	67040104000	9135	T	SED	09/04/24	08/20/25	44372	21040	5	5	39

Update Select Program Changes

Print Program Changes

# 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'

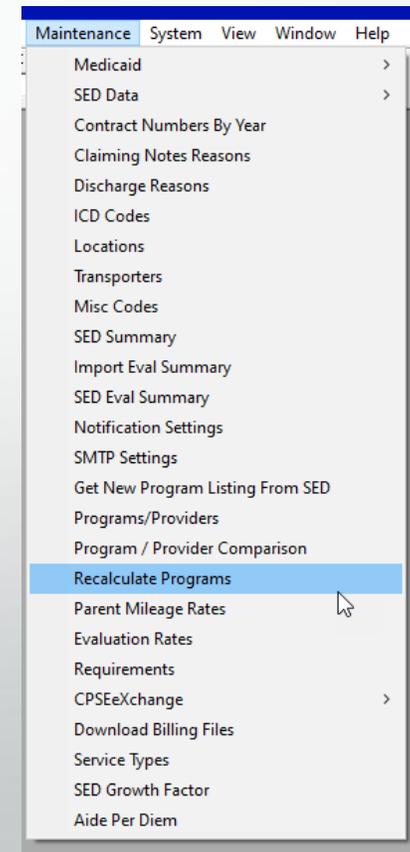


# Recalculating Programs

[Preschoolsupport@CPSEPortal.com](mailto:Preschoolsupport@CPSEPortal.com)

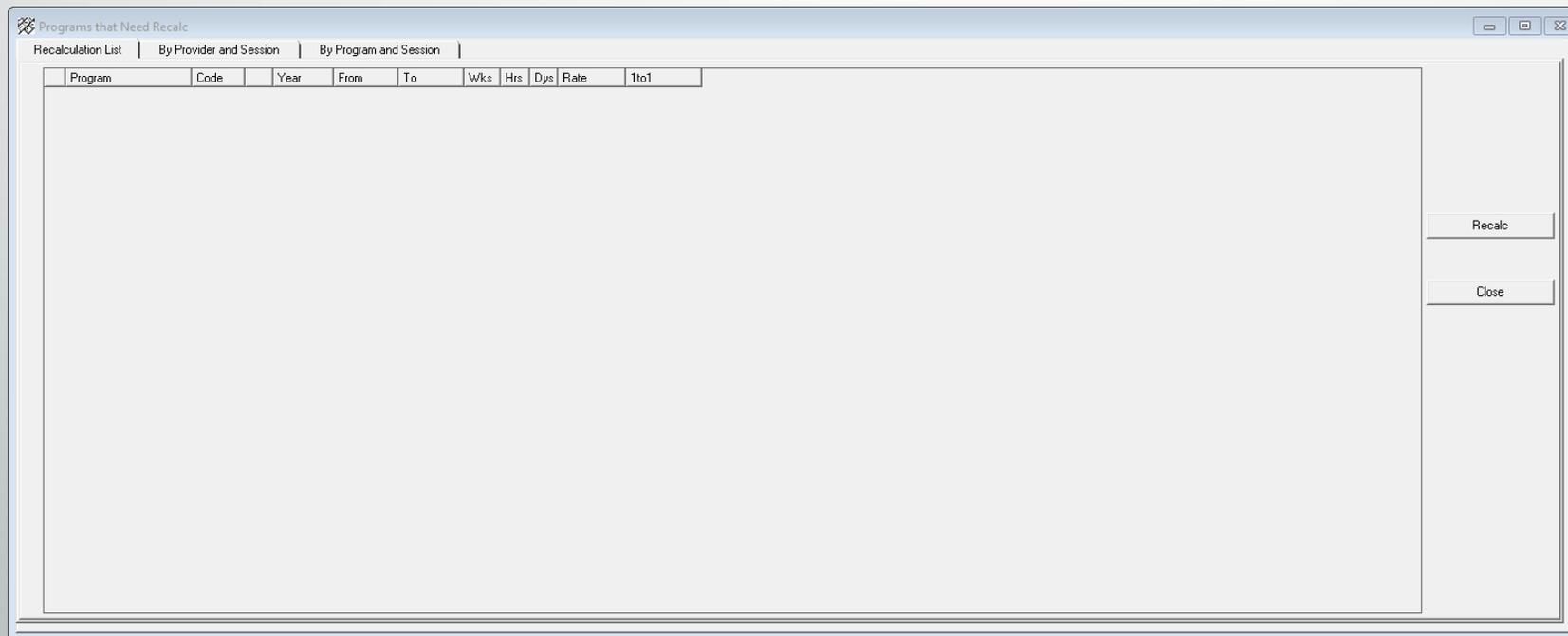
# Recalculate Programs

- 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.



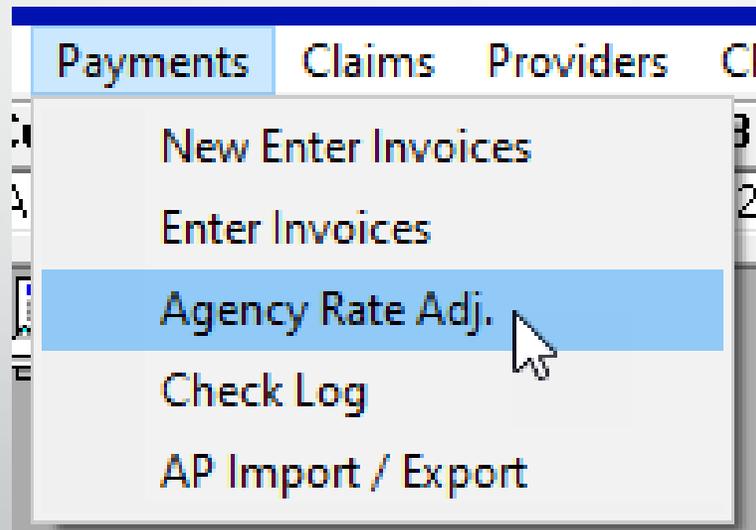


# Agency Rate Adjustment

[Preschoolsupport@CPSEPortal.com](mailto:Preschoolsupport@CPSEPortal.com)

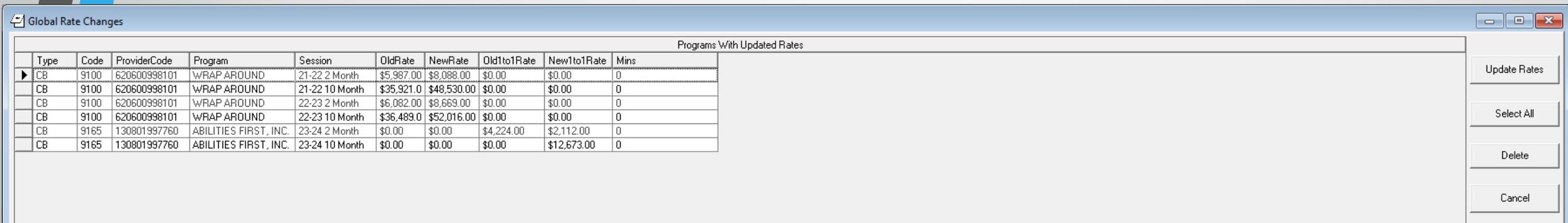
# Agency Rate Adjustments

- 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'



The screenshot shows a software window titled "Global Rate Changes" with a table of programs and their rates. The table has columns for Type, Code, ProviderCode, Program, Session, OldRate, NewRate, Old1to1Rate, New1to1Rate, and Mins. The table is titled "Programs With Updated Rates". To the right of the table are four buttons: "Update Rates", "Select All", "Delete", and "Cancel".

Type	Code	ProviderCode	Program	Session	OldRate	NewRate	Old1to1Rate	New1to1Rate	Mins
CB	9100	620600998101	WRAP AROUND	21-22 2 Month	\$5,987.00	\$8,088.00	\$0.00	\$0.00	0
CB	9100	620600998101	WRAP AROUND	21-22 10 Month	\$35,921.0	\$48,530.00	\$0.00	\$0.00	0
CB	9100	620600998101	WRAP AROUND	22-23 2 Month	\$6,082.00	\$8,669.00	\$0.00	\$0.00	0
CB	9100	620600998101	WRAP AROUND	22-23 10 Month	\$36,489.0	\$52,016.00	\$0.00	\$0.00	0
CB	9165	130801997760	ABILITIES FIRST, INC.	23-24 2 Month	\$0.00	\$0.00	\$4,224.00	\$2,112.00	0
CB	9165	130801997760	ABILITIES FIRST, INC.	23-24 10 Month	\$0.00	\$0.00	\$0.00	\$12,673.00	0

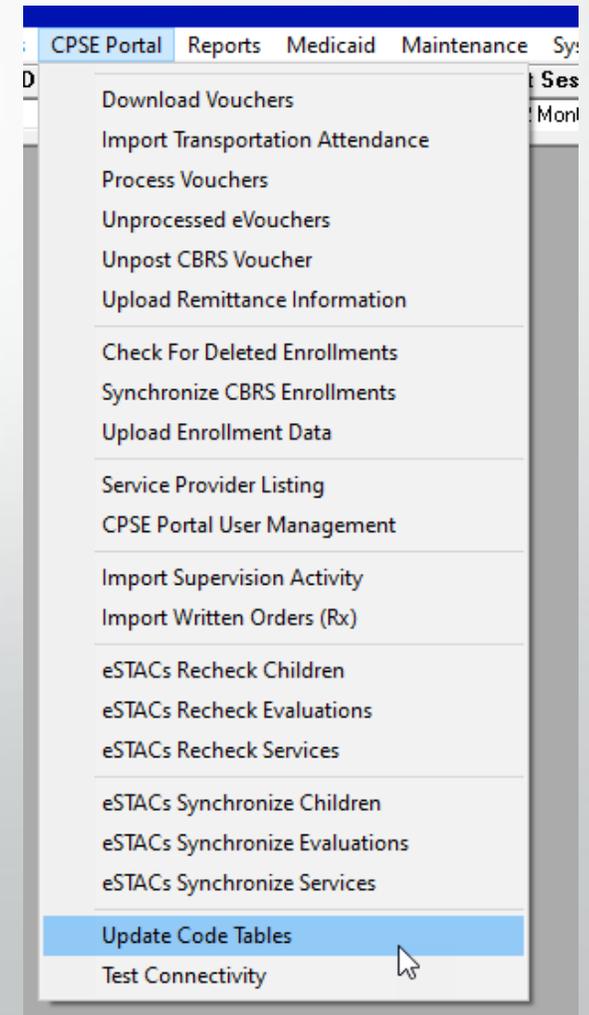


# Update Code Tables

[Preschoolsupport@CPSEPortal.com](mailto:Preschoolsupport@CPSEPortal.com)

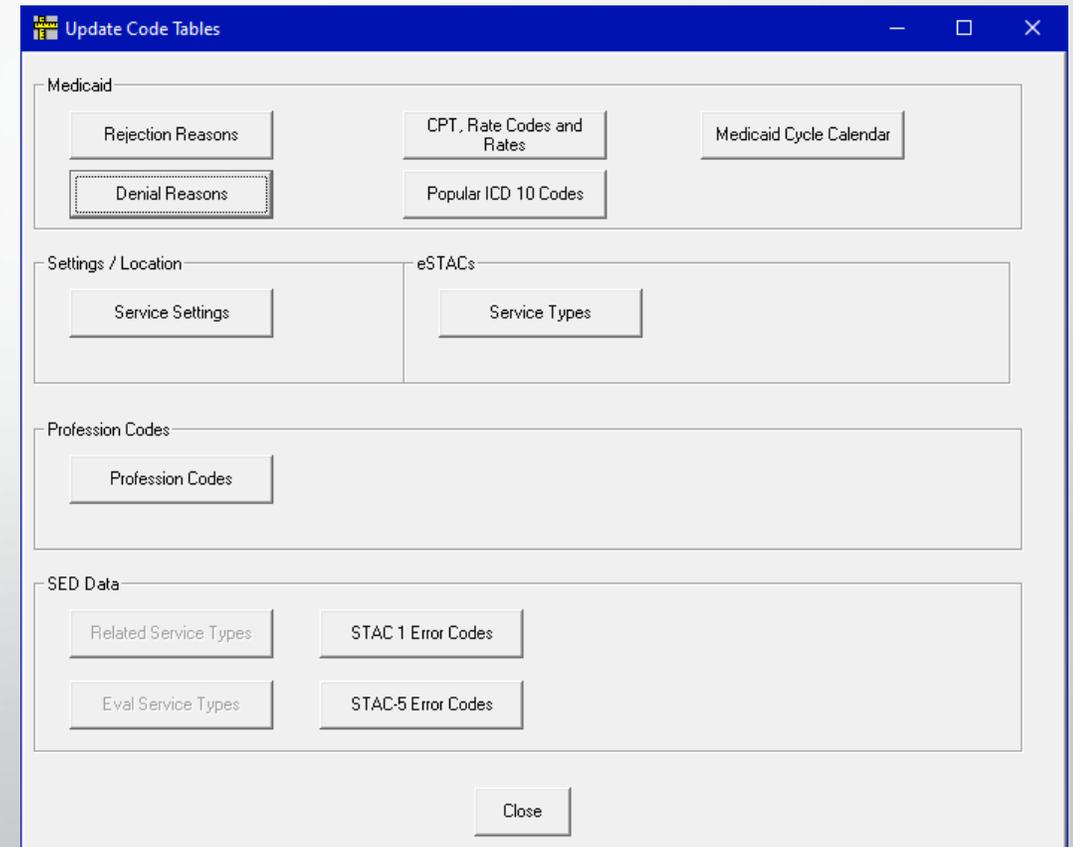
# Update Code Tables

- 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

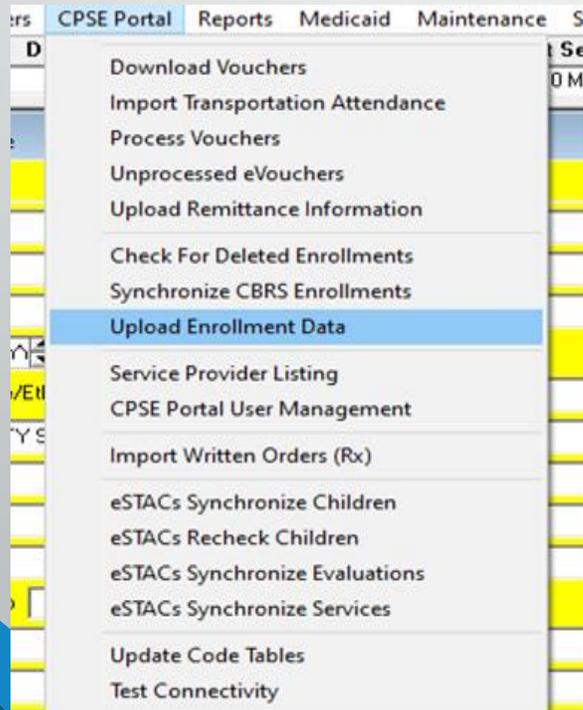
- The top group are Medicaid Codes, including Rejection and Denial Reasons, CPT and ICD codes, as well as the Medicaid Cycle Calendar
- The next group is the Service Settings Codes
- eSTAC's Service types (Only eSTAC's counties)
- The next category is Profession Codes
- The last group is SED Data, STAC 1 and STAC 5 Error Codes
- To update your code tables simply click the button that corresponds to what you want to update.





# 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.

Upload Data to CPSE Portal

Data Source

District: All Districts

Provider: All Providers

Data Filters

Related Services     Related Service Included in Center Based

SEIT

Center Based

From Date: 07/01/2025

To Date: 08/31/2025

Upload

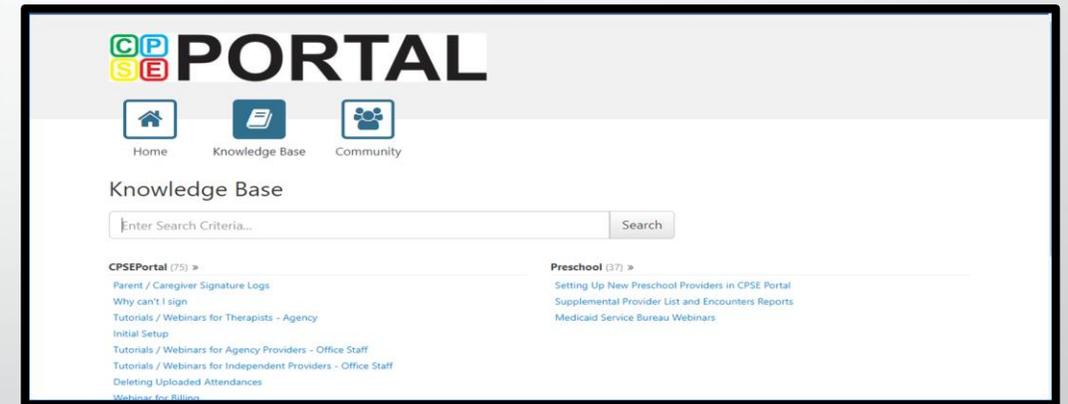


# Closing

[Preschoolsupport@CPSEPortal.com](mailto:Preschoolsupport@CPSEPortal.com)

# 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>



# 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>

# Closing Remarks

- If you need assistance with Preschool the Preschool Helpdesk is available through email at [preschoolsupport@cpseportal.com](mailto: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