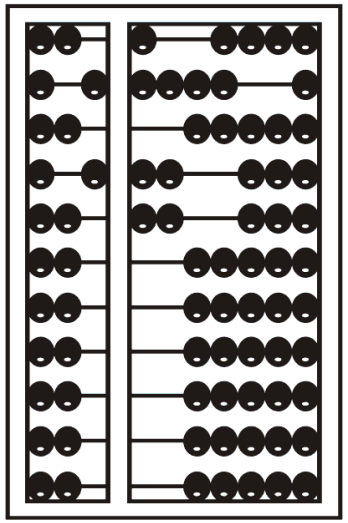
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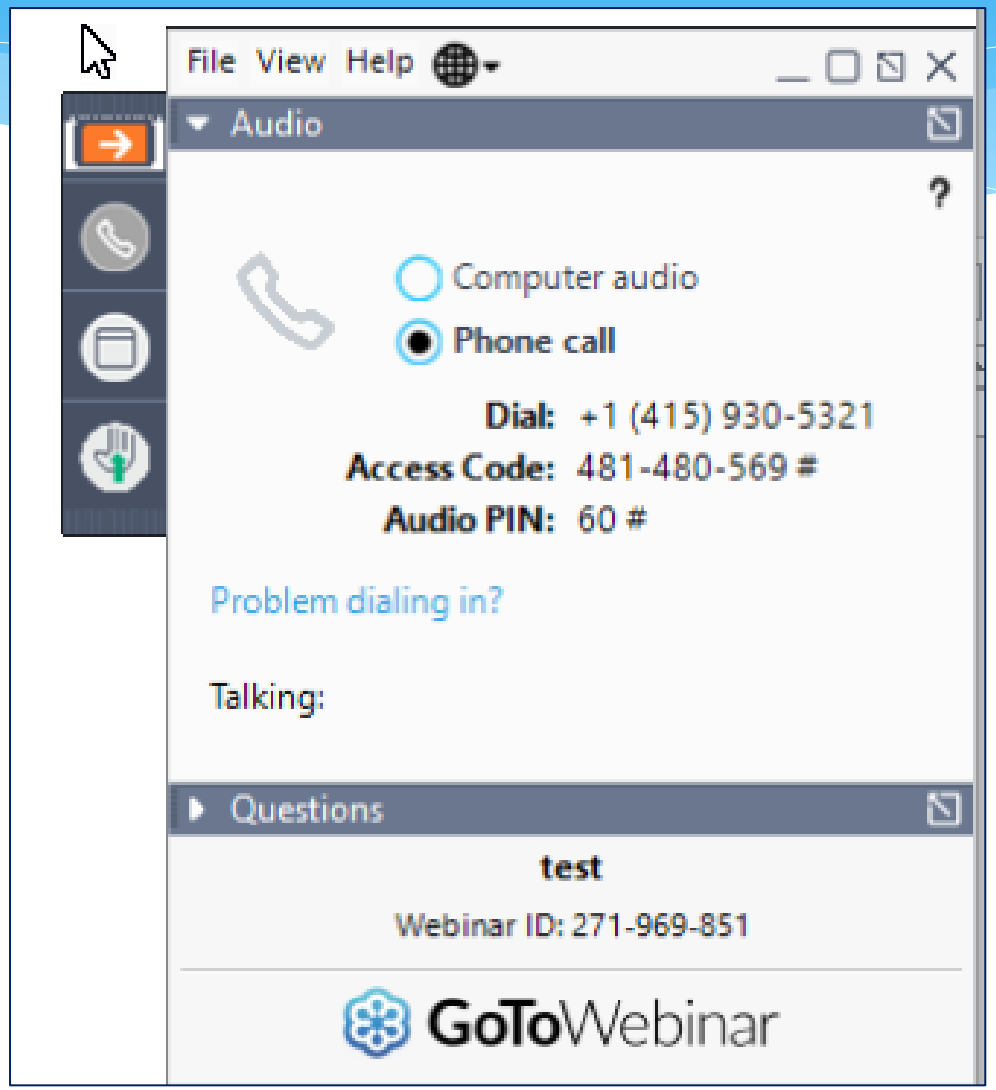


Using Go To Webinar

Goto Webinar Control Panel

- Control panel is on far right of screen
- Orange button with white arrow expands and shrinks control panel



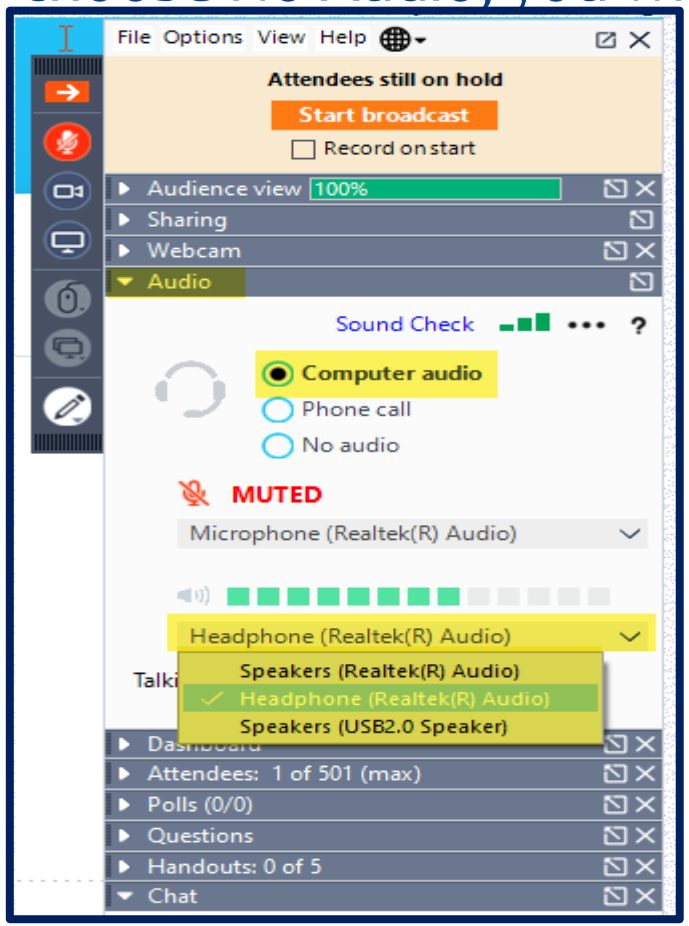


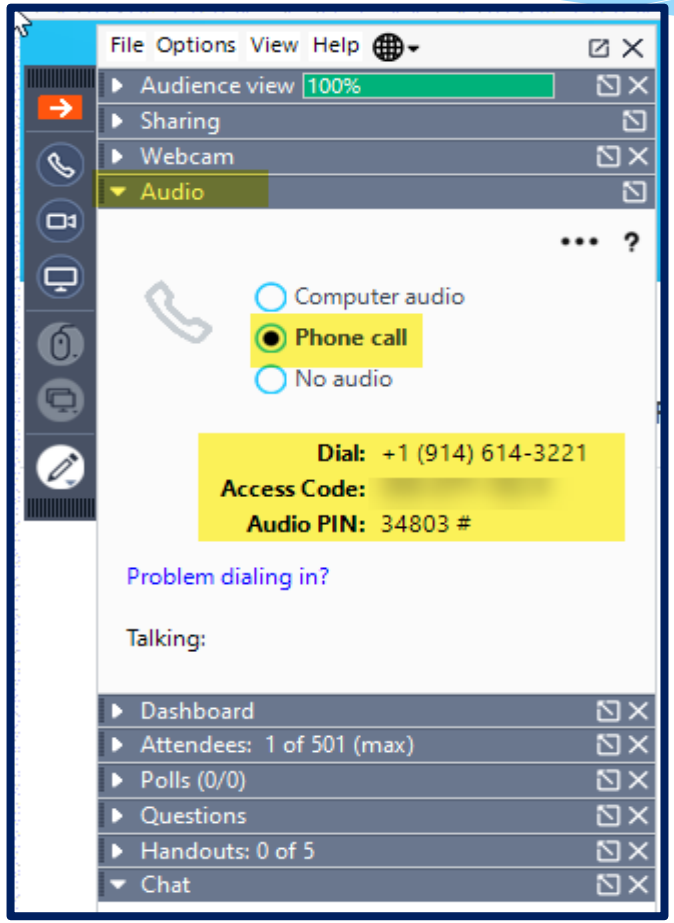
Communicating with Presenter

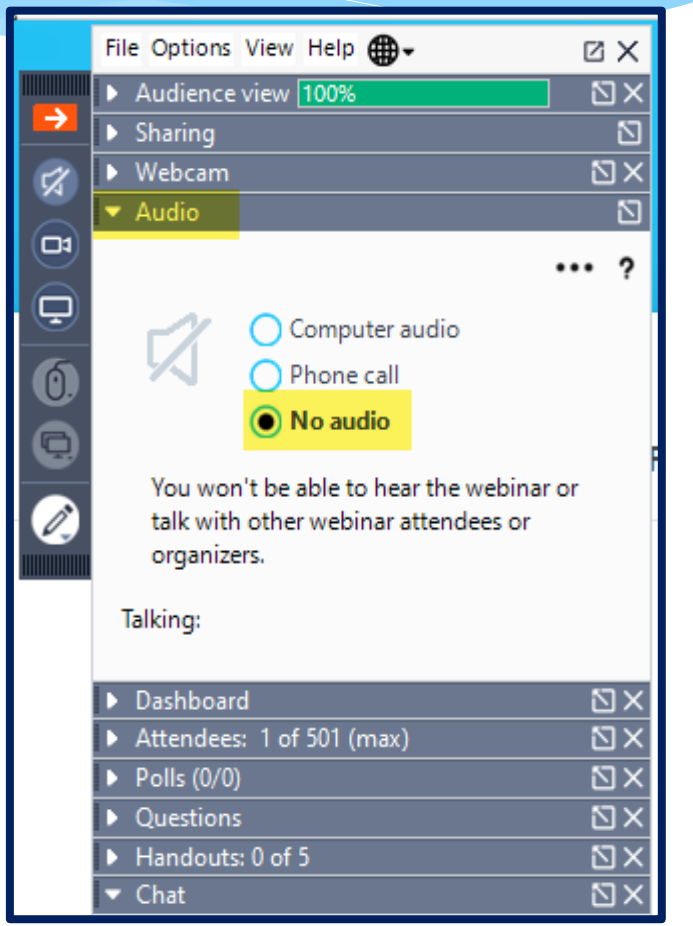
* All participants are on mute.
* Two ways to communicate with us:
  * 1-Raise your hand
  * 2-Type in a question
* You can raise your hand in response to a question we ask. Do not raise your hand to ask a question.
* You can type in question in the question box.

Hearing 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!

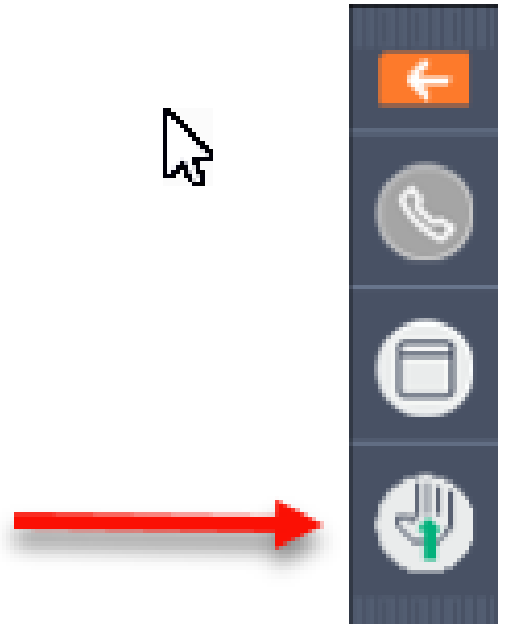






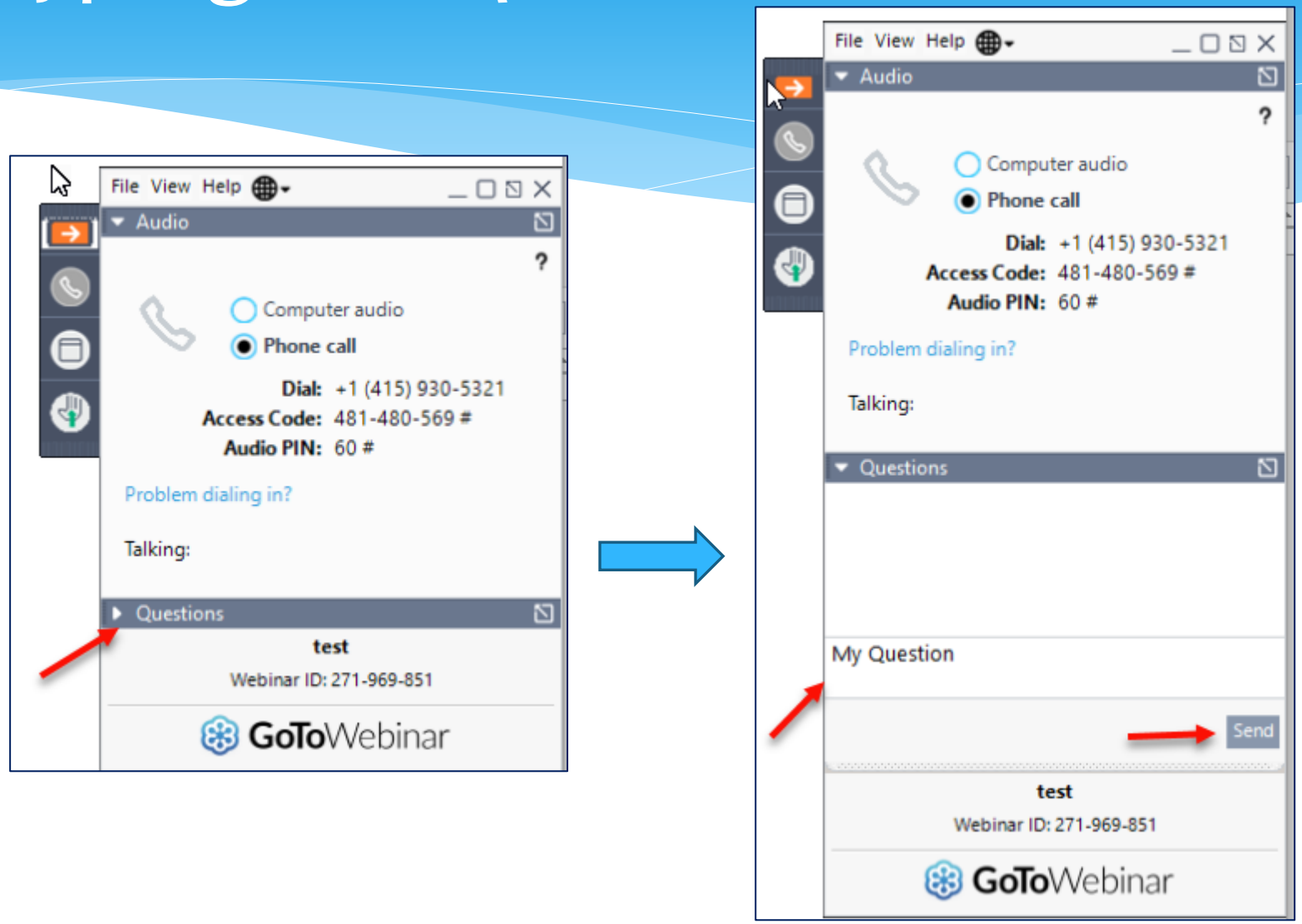
Raising your hand

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



Typing in a Question

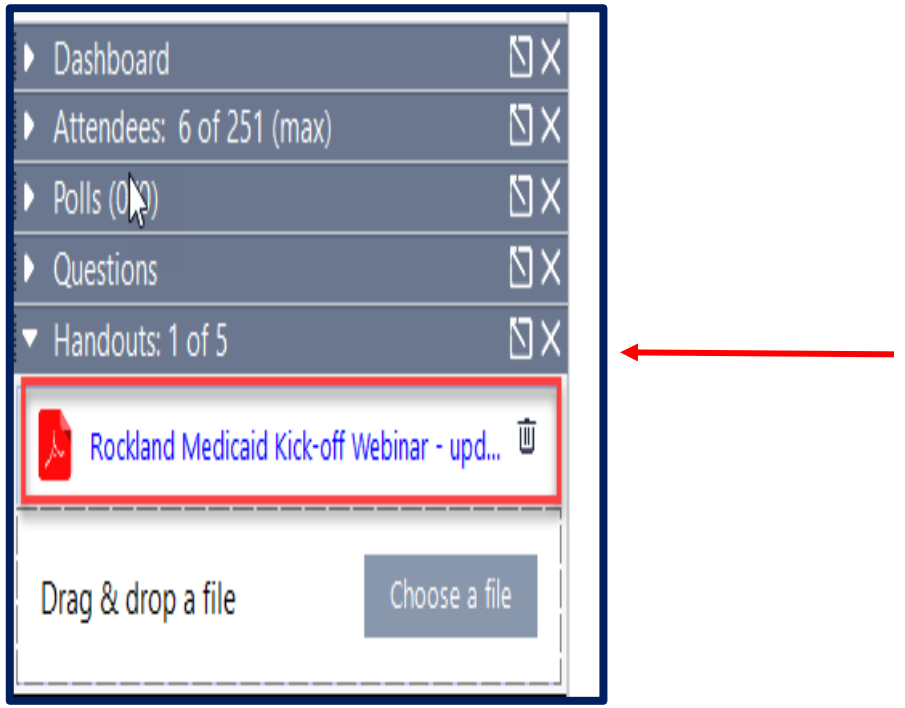
* Click the question bar to expand questions section
* Type in your question and click send



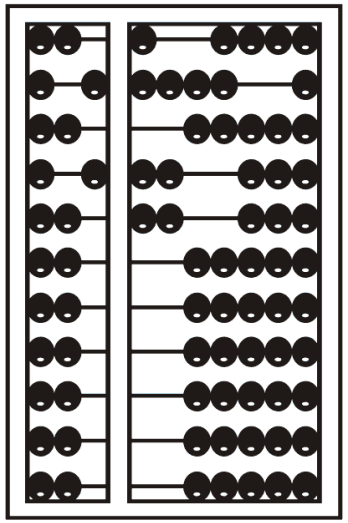
Handouts

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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CPSE Portal
Credential Verification

What is Credential Verification?

* A simple process to verify that the information about a Licensed Professional *(OT, PT, SLP, OTA, PTA, LMSW, LCSW, etc.)* is correctly entered in CPSE Portal.

* The individual's information that needs to be verified:
  * First Name, Last Name & Signature
  * Profession *(OT, PT, SLP, ….)*,
  * License #,
  * Date of Licensure,
  * Date Registered Through
  * NPI #

Credential Verification

* All providers licensed through the New York State Office of the Professions *(Occupational Therapists, Physical Therapists, Licensed Clinical Social Workers, etc.)* as well as non-licensed professionals that work under the direction of an SLP for speech therapy services (TSHH, TSSLD, etc.) provider will need to have their credentials verified.

* Verification means that someone ***(the therapist and/or agency staff)*** will need to review what is on file with the Office of Professions and the NPI Registry to ensure that the information in the Portal is correct and attest that the information is correct.

* Someone at the County will review and approve the verified information.

Why Do We Need Credential Verification

* Counties have found too many instances of incorrect information in the CPSE Portal. This incorrect information then gets propagated to Medicaid, treatment logs, prescriptions, etc.
* Examples:
  * Therapist has Supervisor's license # listed instead of their own.
  * Therapist has Agency NPI listed instead of their own.
  * Therapist has typo in license number.
  * Therapist's name was changed, but CPSE Portal was not updated.
  * Therapist is listed as a Licensed Speech and Language Pathologist when they were not licensed (CFY / TSHH / TSSLD).
  * Therapist's license needs to be re-registered.

Whose Credentials Need to be Verified

* For most Counties, only a licensed professional's credentials need to be verified.
  This includes SLP, OT, OTA, PT, PTA, LMSW, LCSW, etc. They can be found on http://www.op.nysed.gov/.

* Some Counties are now requiring non-licensed professionals *(teachers, school psychologists, etc.)* to verify their credentials. Many non-licensed professionals do not have NPI numbers so it becomes only a name verification.

* Individuals that are not licensed, but can work under the direction / supervision of a licensed professional. These include CFY, Limited Permit OT, Limited Permit PT, TSHH, TSSLD.

Who Can Complete the Verification Process

* Any service provider that has a login to the CPSE Portal can verify their own credentials.

* A licensed professional that does not have a login to CPSE Portal *(because their agency uploads data from another system)*, can also verify their own credentials using their NPI and license number.

* An agency can verify the credentials of any service provider that works for them.

Who "Should" Complete the Verification Process

* Ideally, the individual should verify their own credentials.

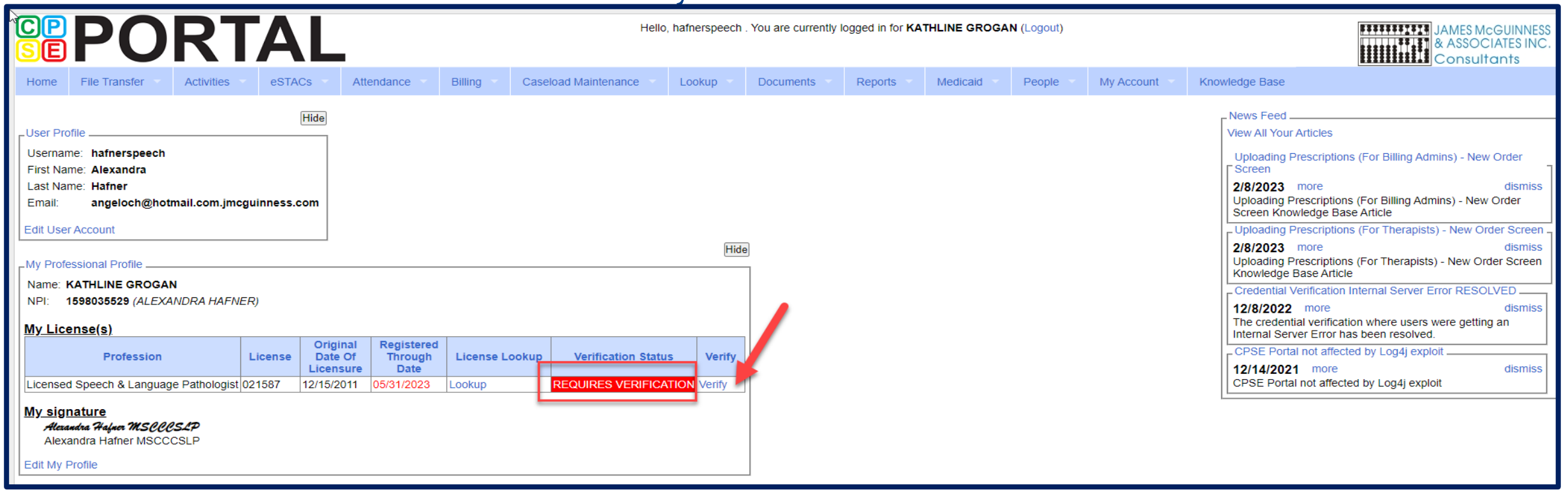
* However, it is really an agency preference. If the agency feels it is easier for their staff to do it for their therapists, that works. If they want to do it for some therapists but not others, that works too.

Credential Verification by Therapist with a Login

Support@CPSEPortal.com

Credential Verification by Therapist with a Login

* If therapists credentials need to be verified:
  * When therapist logs into their Portal account, their home page will show in red "***REQUIRES VERIFICATION***". Now click the "Verify" button.



Verifying Name

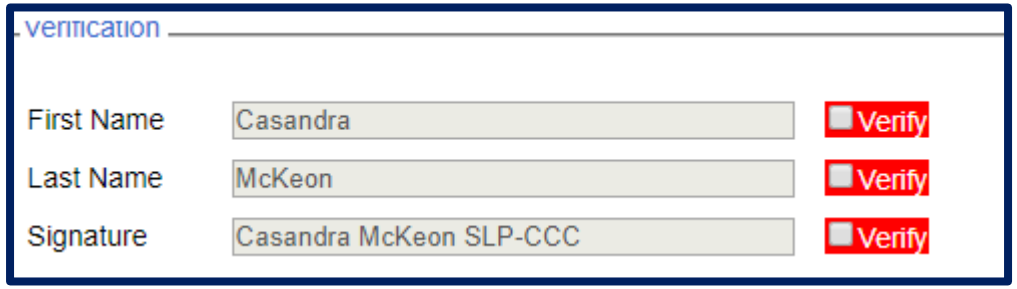
* The screen will show the therapists first name, last name and how their signature should appear.

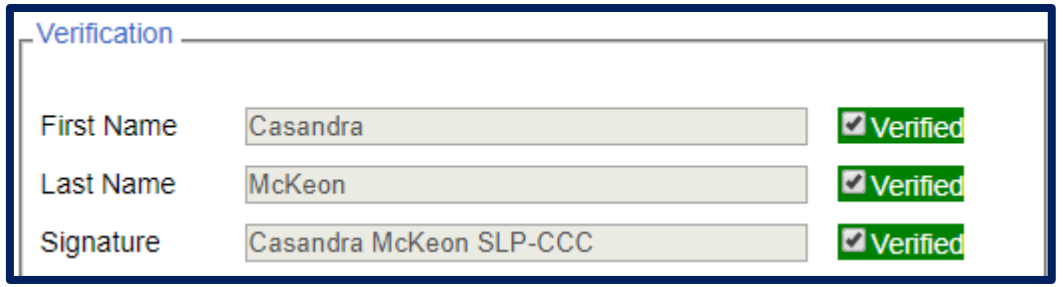
* Verify
  * The first name is their full first name and it is spelled properly.
  * The last name is their full *(hyphenated, etc.)* current *(any name changes)* last name
  * The signature is spelled out exactly as it would appear if the individual signed their professional name, with punctuation, titles, credentials, etc.

Verifying Name

* Review First Name, if correct click “Verify”
* Review Last Name, if correct click “Verify”
* Review Signature, if correct click “Verify”

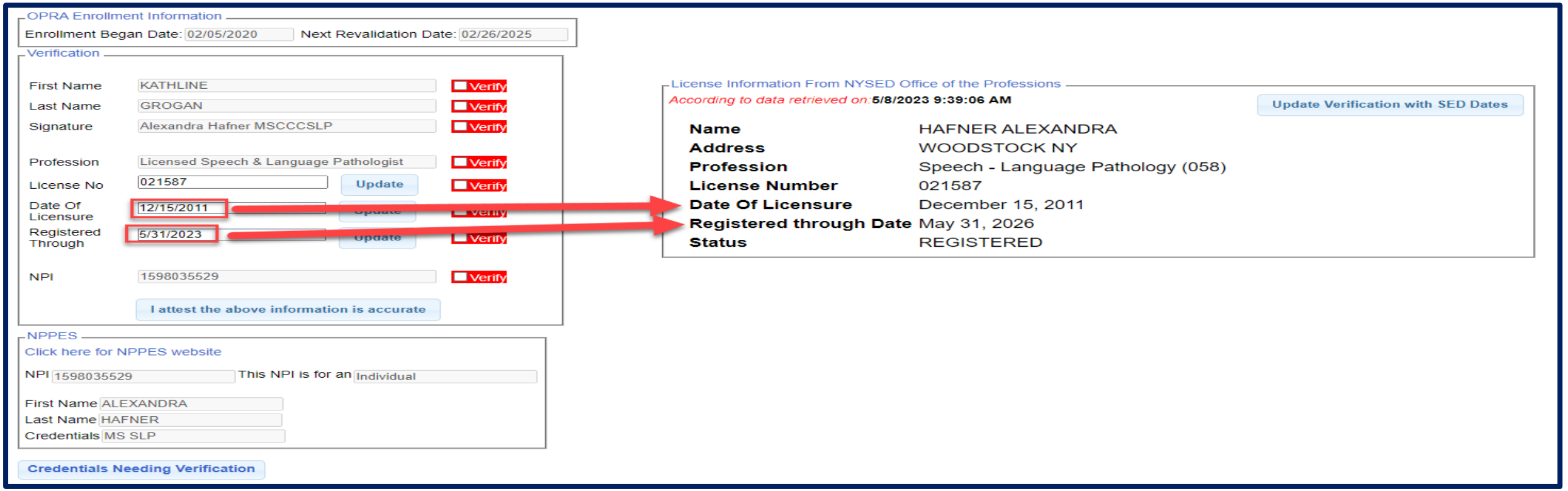
After you click the red “verify” button, the status changes to green and says, “verified.”





Verifying License

* Compare the CPSE Portal information on left to NYS Office of the Professions on the right to verify it is the same person.
* You can edit/update the License #, date of licensure and registered through date.



Verifying License

* The verification screen will display the NYS Office Of the Professions online verification page for the license number and profession entered into CPSE Portal. You will verify the following information:
  * Verify that the individual's profession and license # are correct in CPSE Portal by seeing that the NYS verification page shows the information for the same individual.
  * Verify that the Date of Licensure in CPSE Portal is correct by comparing to what NYS has on file.
  * Verify that the "Registered Through" date in CPSE Portal is correct by comparing to what NYS has on file.

If the license information is wrong in CPSE Portal, how do I change it?

* The service provider can correct this information under ***My Account -> My Profile***.

* You can edit the license #, date of issue and registered through date on the verification screen.

What if CPSE Portal name does not match NYS?

* The goal of verifications is to verify that the data in the CPSE Portal is correct.
* The NYS Office of the Professions displays a person's full name, which may include the middle name.
  * The goal is not to match the first and last name in CPSE Portal to the first last and middle name on the NYS website.
  * The goal is to make sure the first and last name in CPSE Portal are correct and that the license number is correct.
  * The question for verification is not whether they match, but whether the CPSE Portal has the correct information.

If the name does not exactly match NYS because…

* NYS has a middle name, and the CPSE Portal does not, then there is **no issue**.
* Name is spelled incorrectly in CPSE Portal, then **correct it in CPSE Portal** before verifying it is correct.
* Name is spelled incorrectly on the NYS website, the therapist should **contact NYS** to correct it.
* Therapist changed their name and it has not been updated in the CPSE Portal, **correct it in the CPSE Portal** before verifying it is correct.
* Therapist changed their name and it has not been updated on the NYS website, then the therapist should **contact NYS** to have it corrected.

Name Change on NYS Office of the Professions

* According to the New York State Office of Professions, *http://www.op.nysed.gov/prof/geninfo.htm*

  *"*Once you are licensed, Education Law requires that you notify the Department of any change in your name or mailing address **within 30 days** of the change. Failure to do so may be considered professional misconduct. It may also delay renewal and result in late fees to renew the registration of a professional license."*

* To change your name with NYSED

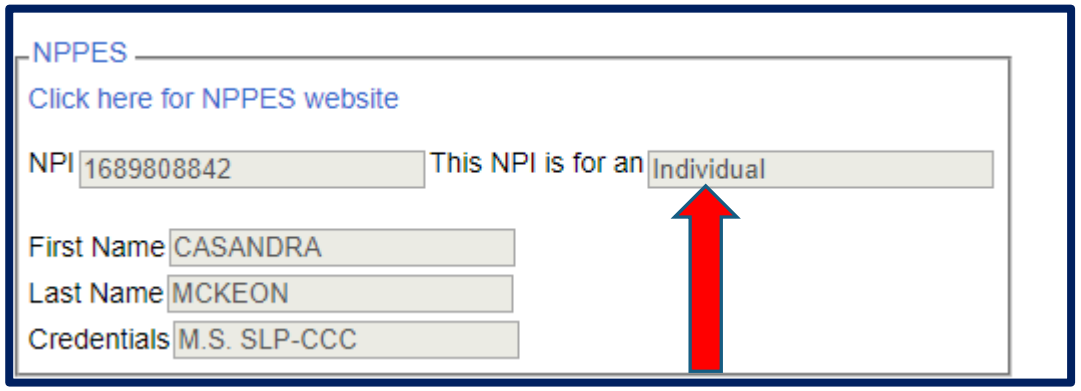
  http://www.op.nysed.gov/documents/anchange.pdf

Verifying Your NPI

* The screen will display the individual's information from the NPPES NPI registry.

* You should verify that:
  * The NPPES information is for an individual and **NOT** a corporation.

  * The NPPES information is for the same therapist that you are verifying, thus meaning their NPI is correct.



What if the information on NPPES Doesn't Match

* We assume that at this point, you are sure that the name in the CPSE Portal is correct, so…
  * Is the name from NPPES a corporation and not a person? If so, **do not verify** and contact the CPSE Portal Support team with the correct NPI.
  * Is the name from NPPES an entirely different person? If so, **do not verify** and contact the CPSE Portal Support Team with the correct NPI.
  * Is the name from NPPES the same person, but spelled incorrectly or not updated after a name change? If so, **you can verify** that the NPI is the correct NPI for the person, and the therapist should contact NPPES to update their information.
  * ***https://npiregistry.cms.hhs.gov/***

If the NPI # is wrong in CPSE Portal, how do I correct it?

* You cannot change your NPI # in the Portal if it is wrong.

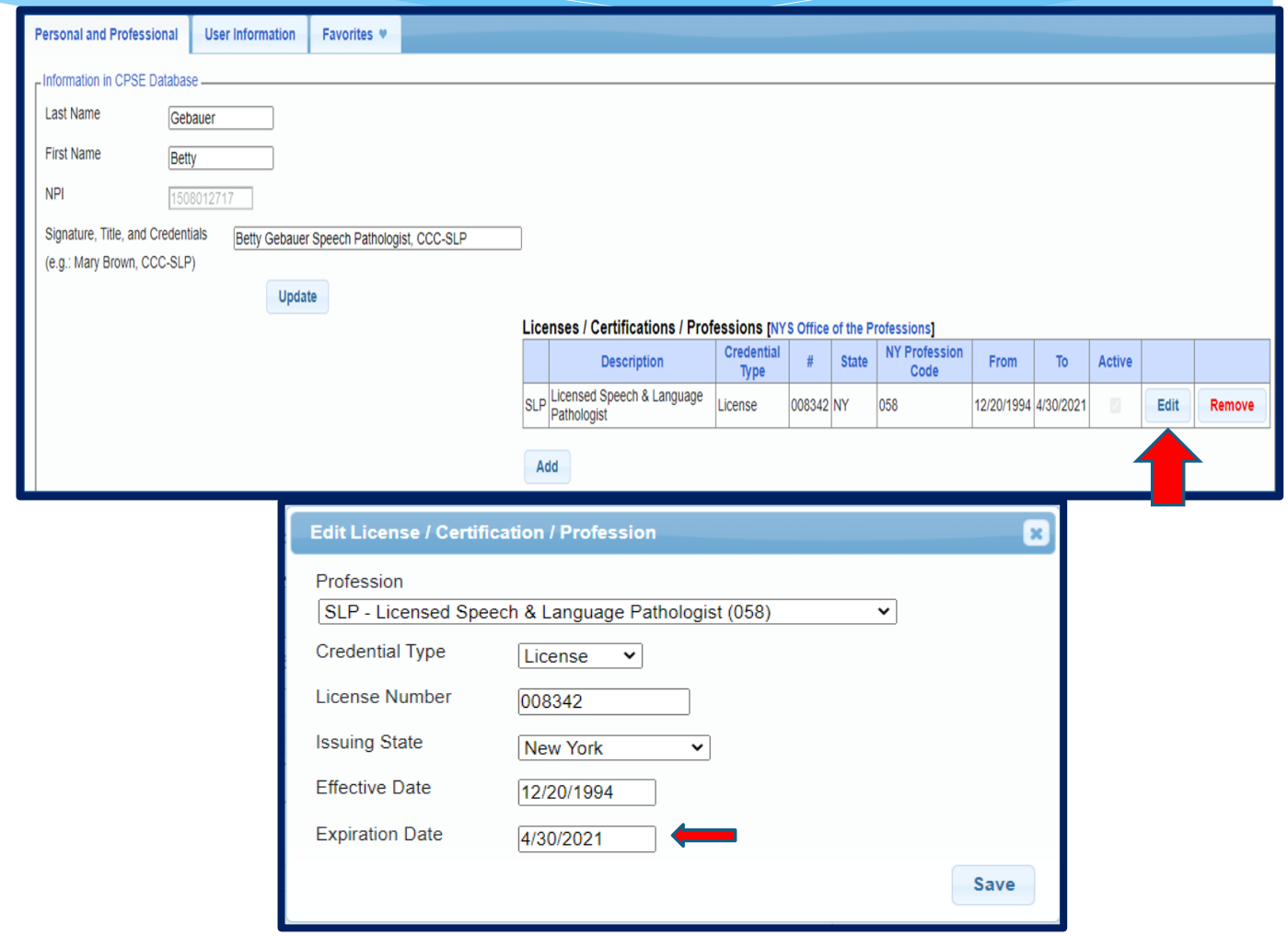
* You must contact CPSE Portal support at ***support@CPSEPortal.com*** with the correct NPI.

If a therapist's name is wrong in CPSE Portal, how do I correct it?

* If the therapist has a login to CPSE Portal…
  * If they only work for one agency, that agency can change it.
  * If they work for multiple agencies, the therapist must log in and change it under ***My Account -> User Account Details***
* If the therapist does not have a login to the CPSE Portal, the agency can change it by going to ***People -> Service Provider Credential Listing***.

When License Expires

* Go to ***My Account > My Profile***.
* Under the Personal and Professional tab you will choose the Edit button.
* You will then receive the Edit License / Certification / Profession pop up box.
* You will enter your new license expiration date.
* You will **NOT** change the license Effective Date, as this date will remain your original license start date.



Credential Verification
by Therapist without a Login

Support@CPSEPortal.com

Credential Verification by Therapist without a Login

* Use the link below and complete the information on the login screen.
* Verify Credentials.
* ***https://www.cpseportal.com/NonCPSEUserCredentialVerification/EnterCredentials.aspx***



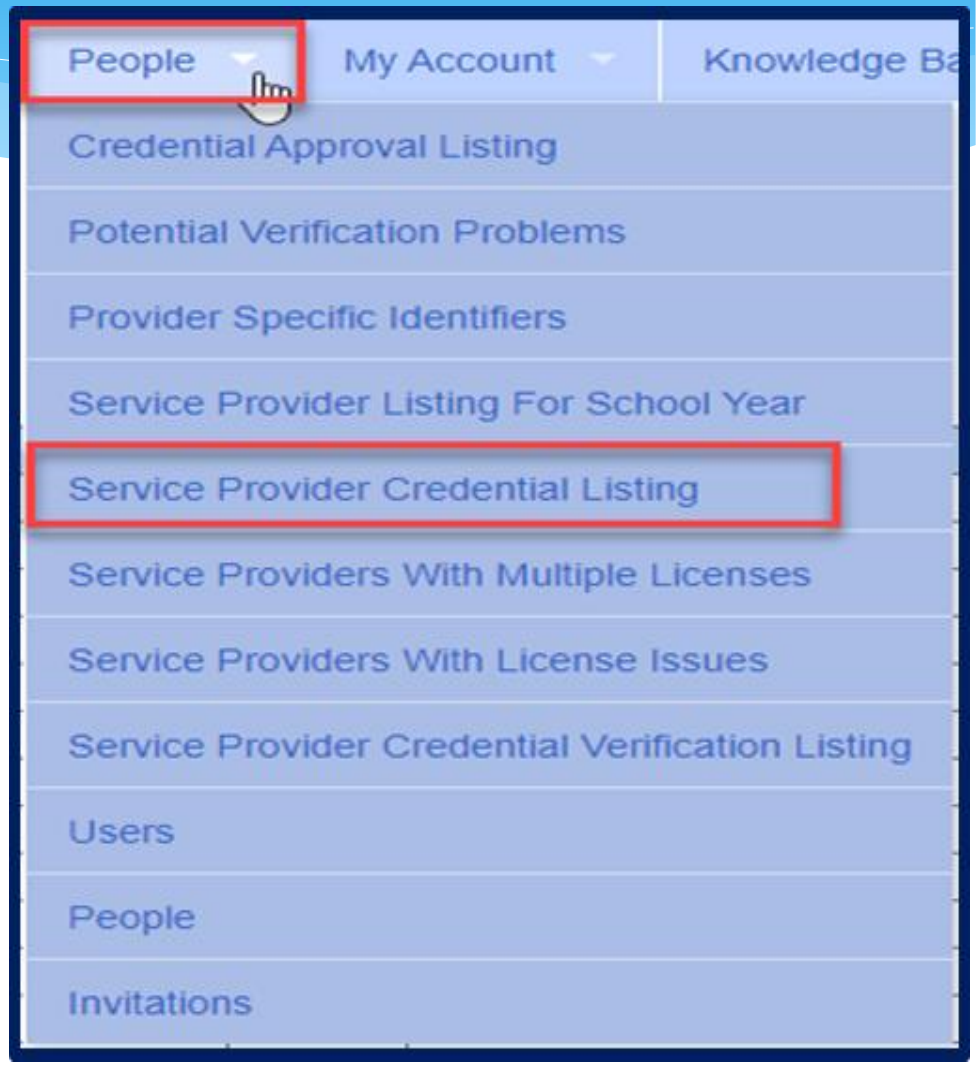
Credential Verification by Agency

Support@CPSEPortal.com

Service Provider Credential Listing for Agencies

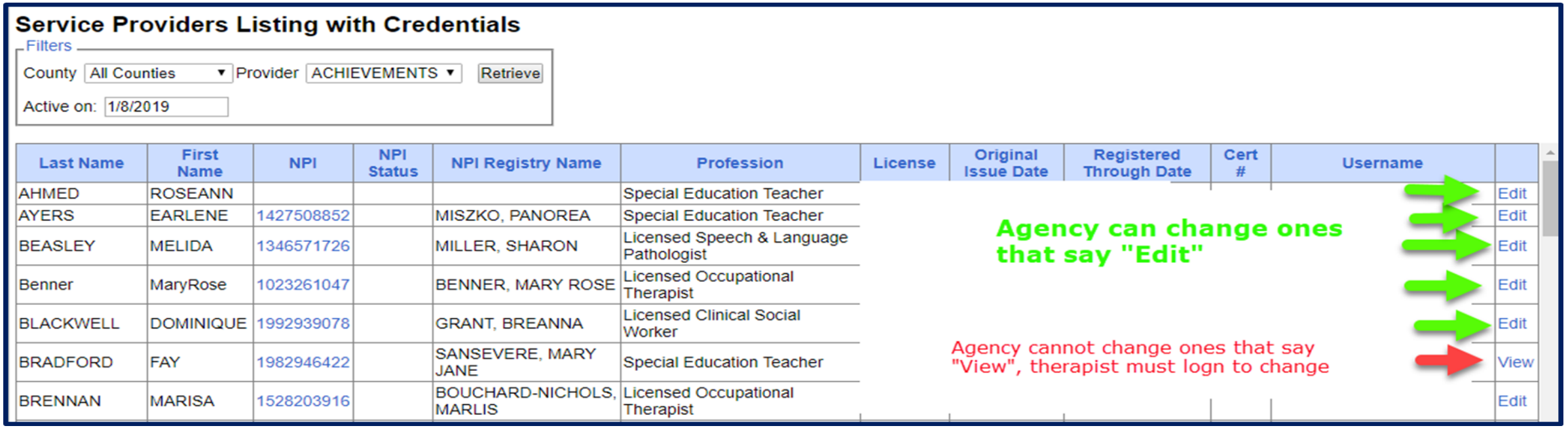
* Agencies can edit their service providers name, license information or profession *(e.g., OT vs OTA)* providing the service provider doesn't work for two or more agencies.

* The agency can go to ***People -> Service Provider Credential Listing*** to edit the credentials.



Service Provider Credential Listing for Agencies

* If there is an "***Edit***" next to the therapist's name, then the agency can edit the providers information.
* If there is a "***View***" next to the therapist's name, then the agency can only view the providers information. Only the provider can make the changes or you can email the help desk at ***Support @CPSEPortal.com***, and McGuinness can update the changes.



Service Providers Listing with Credentials

Filters

County: All Counties | Provider: ACHIEVEMENTS | Retrieve

Active on: 1/8/2019

Last Name	First Name	NPI	NPI Status	NPI Registry Name	Profession	License	Original Issue Date	Registered Through Date	Cert #	Username	
AHMED	ROSEANN				Special Education Teacher						Edit
AYERS	EARLENE	1427508852		MISZKO, PANOREA	Special Education Teacher						Edit
BEASLEY	MELIDA	1346571726		MILLER, SHARON	Licensed Speech & Language Pathologist						Edit
Benner	MaryRose	1023261047		BENNER, MARY ROSE	Licensed Occupational Therapist						Edit
BLACKWELL	DOMINIQUE	1992939078		GRANT, BREANNA	Licensed Clinical Social Worker						Edit
BRADFORD	FAY	1982946422		SANSEVERE, MARY JANE	Special Education Teacher						View
BRENNAN	MARISA	1528203916		BOUCHARD-NICHOLS, MARLIS	Licensed Occupational Therapist						Edit

Agency can change ones that say "Edit"

Agency cannot change ones that say "View", therapist must logn to change

Credential Verification by Agency Office Staff

Go to ***People -> Service Provider Credential Verification Listing***
Click on "***Verify***" next to providers name.



Filters

County: All Counties ▾ Provider: ACHIEVEMENTS ▾ Retrieve

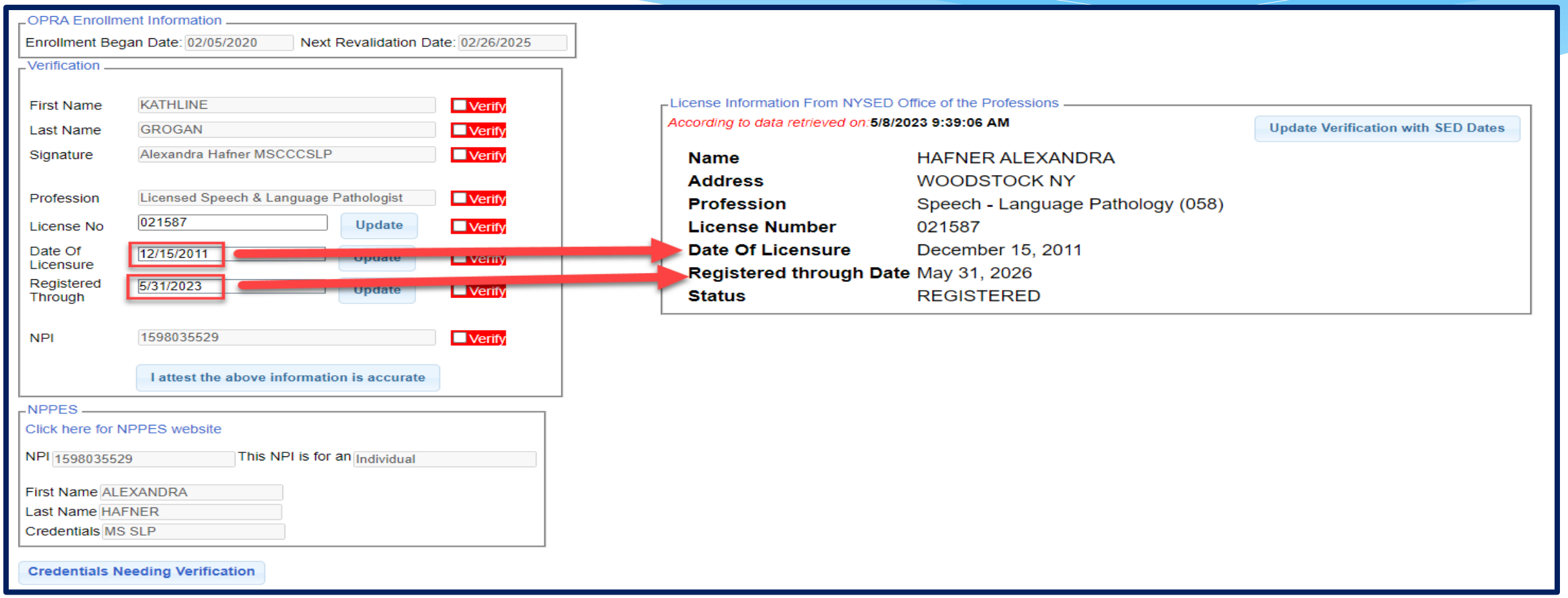
Profession: All Professions ▾ Include Prevously Verified

Person Name	NPI	Profession	Credential Type	Credential Number	From Date	To Date	Status	Verify	History
BEASLEY, MELIDA	1346571726	SLP	License	010753	11/12/1998	12/31/2020	REQUIRES VERIFICATION	Verify	History
Benner, MaryRose	1023261047	OT	License	009248	12/13/1999	12/31/2019	REQUIRES VERIFICATION	Verify	History
BLACKWELL, DOMINIQUE	1992939078	LCSW	License	080709	05/02/2013	02/28/2019	REQUIRES VERIFICATION	Verify	History
BRENNAN, MARISA	1528203916	OT	License	007750	10/22/1996	02/29/2020	REQUIRES VERIFICATION	Verify	History
Brezina, Elena	1003051277	SLP	License	009939	01/01/2017	02/01/2020	REQUIRES VERIFICATION	Verify	History
CARLSON, CARMEN	1811445802	OT	License	020866	08/25/2016	07/31/2019	REQUIRES VERIFICATION	Verify	History

Credential Verification by Agency Office Staff

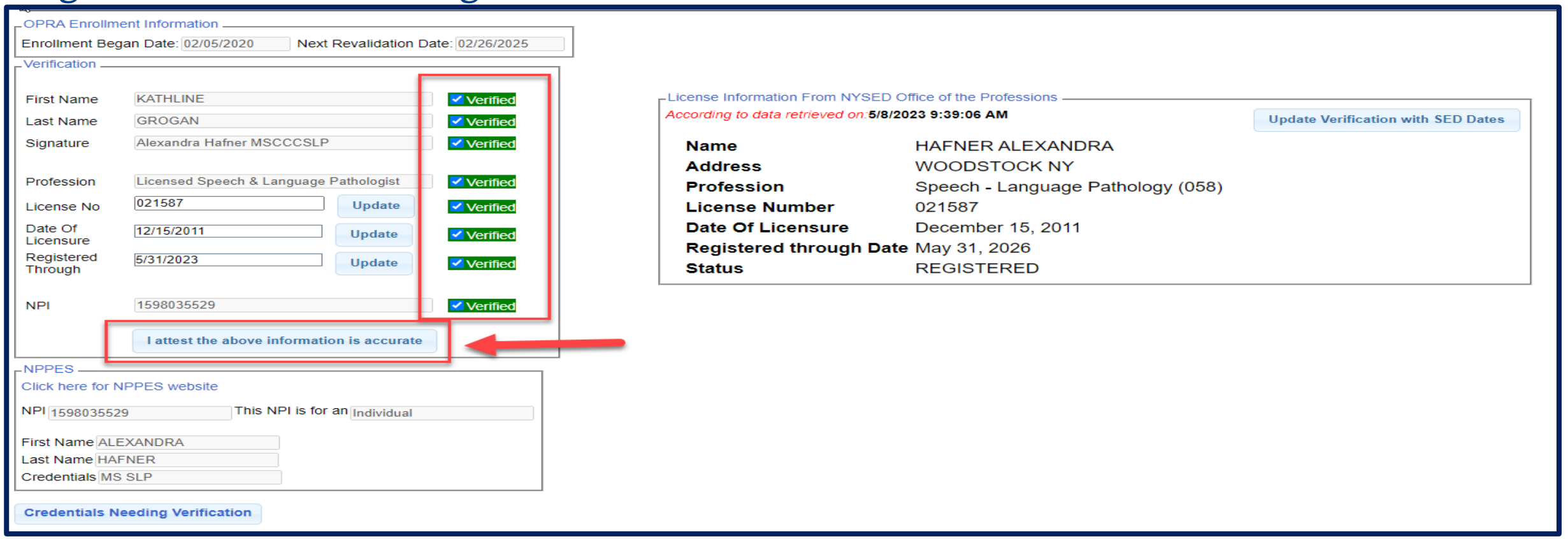
* The verification screen has three main sections:
  * The list of information from the service providers profile (name, NPI, license, etc.) that needs to be verified and attested that it is correct (upper left)
  * The information for their license as it appears on the NYS Office of the Professions website (right hand side)
  * The information from the National NPI Registry for their NPI (bottom left)
* Be sure to compare the **two exactly**, as you will be attesting that the information in the Portal is accurate.

Credential Verification by Agency Office Staff



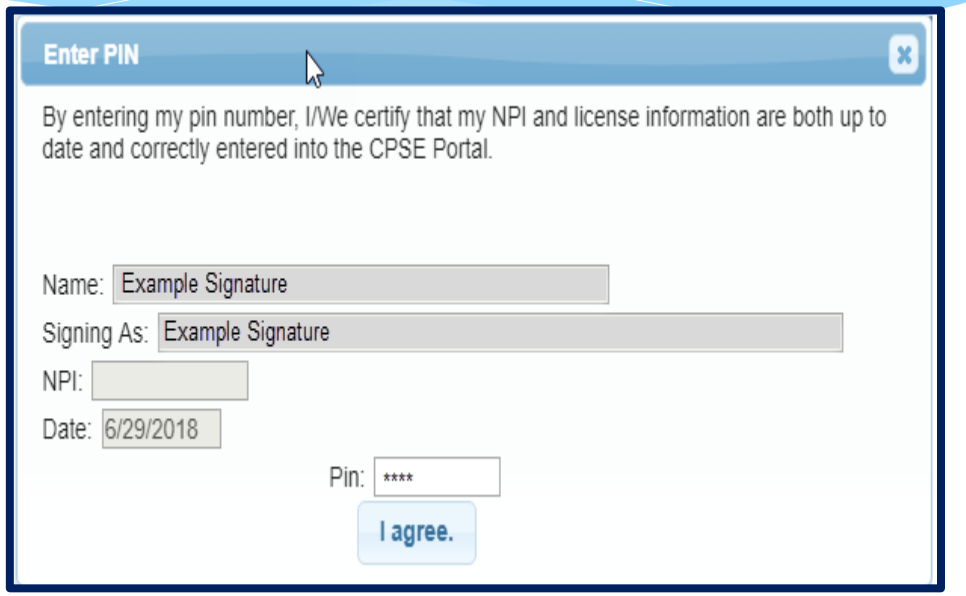
Credential Verification by Agency Office Staff

* Once you verify that the information is correct, check the "***Verified***" box and it will turn green. You are attesting that all of the information is accurate and correct.



Credential Verification by Agency Office Staff

* Once you have confirmed that all of the data is accurate and all of the "verify" boxes are checked, click "I attest."
* The prompt to enter your pin will then pop up. Your name and signature will auto-populate based upon your profile on CPSE Portal.
  * Enter pin and select "***I agree***."
* You will then see the confirmation underneath the verification.



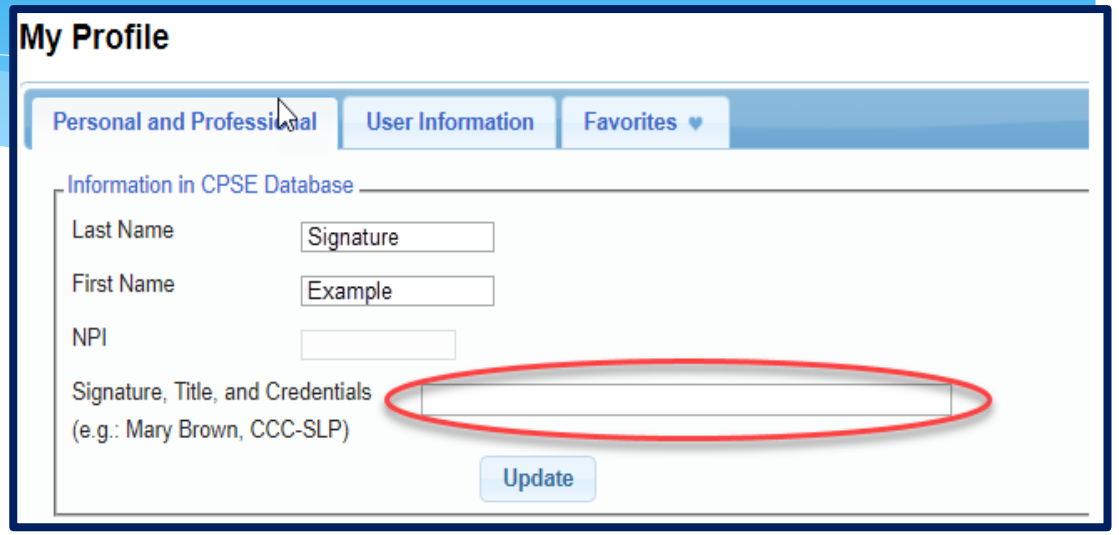


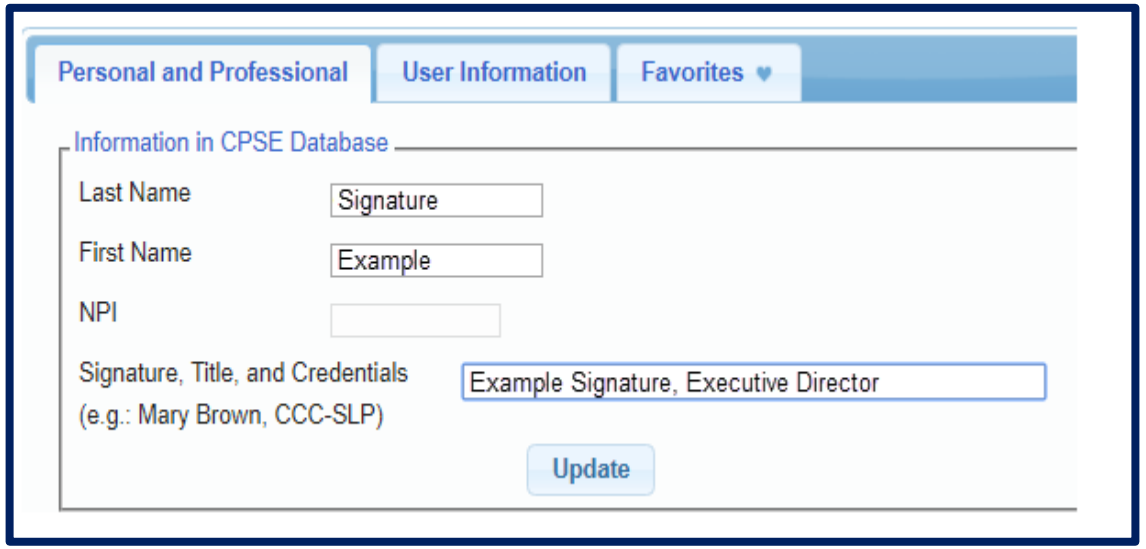
Credential Verification by Agency Office Staff

* If you get this message:

> ⚠ Your profile does not have a signature. Please edit your profile and enter your signature.

* This means, that you do not have your Signature Title and Credentials filled out. This does NOT have to do with the service provider you are verifying, but rather, the agency admin.
* You will need to go to your profile (***My Account -> My Profile***) and add this in.

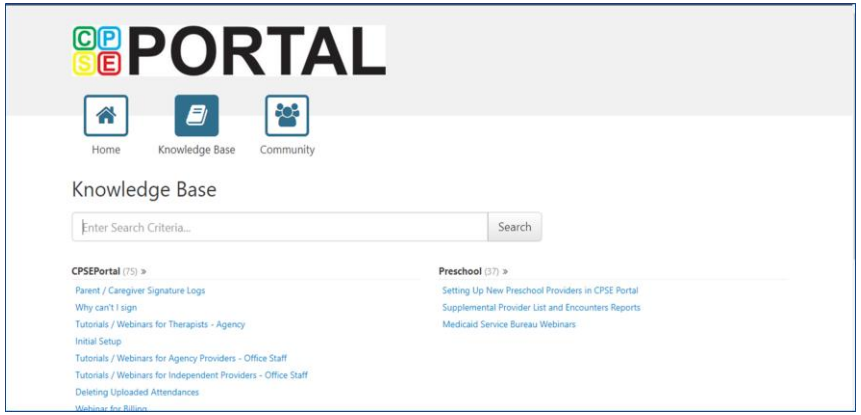




Closing

Portal Training – Knowledge Base

* The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Portal support.
* You can simply click the Knowledge Base tab in the Portal or you can go to:
* ***http://support.cpseportal.com/kb***



Knowledge Base Articles

* **Credential Verification by Individual with Login:**
  * *http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx?KBSearchID=16524*
* **Credential Verification by Individual without Login:**
  * *http://support.cpseportal.com/kb/a151/credential-verification-no-cpse-portal-login.aspx?KBSearchID=16524*
* **Credential Verification by Agency Office Staff:**
  * *http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx?KBSearchID=16524*
* **OPRA Information:**
  * *http://support.cpseportal.com/kb/a255/opra-enrollment-information-website.aspx*

Upcoming Webinars

CPSE Portal Agency Case Management: (Agency Admins)

- **Thursday, November 12th, 2026 @ 10:00AM**
  - **https://attendee.gotowebinar.com/register/8712957207182657886**
- **Thursday, November 12th, 2026 @ 3:30 PM**
  - **https://attendee.gotowebinar.com/register/5260305978012564822**

Topics Covered During This Webinar:

- *Child Lookup*
- *Unmatched Children and Enrollments*
- *Assigning Children to Therapist/SEIT*
- *View Unmatched Enrollments*
- *Matching Children*
- *Matching Enrollments*
- *Moving Attendances Between Enrollments*
- *Enrollment Lookup Report*
- *Enrollment Assignments Report*

Upcoming Webinars

CPSE Portal Center Based (CB)Agency Case Management: (Agency Admins)

* **Tuesday, November 17th, 2026 @ 10:00AM**
  * https://attendee.gotowebinar.com/register/4627704161994945120
* **Tuesday, November 17th, 2026 @ 3:30 PM**
  * https://attendee.gotowebinar.com/register/8402875136940559193

Topics Covered During This Webinar:

* *Classroom Management*
* *Creating a Schedule for the School*
* *Unmatched Children and Enrollments*
* *Entering and Signing Classroom Attendance*
* *CB Enrollments Missing Attendance*

Closing remarks

* The Portal is a helpful tool for both the County and their preschool providers

* CPSE Portal Address (you may want to bookmark):

  https://www.cpseportal.com

* In addition to the Portal Knowledge base, our Help Desk is available through email at ***support@CPSEPortal.com***
  * ***When emailing the Help Desk, do not use the child's name as this is a HIPPA violation!!***
    * ***Use the child's ESID # or their child #.***