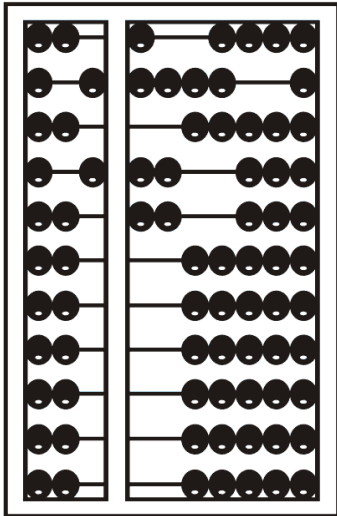


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Using GoToWebinar

Go to Webinar Control Panel

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



The screenshot shows the GoTo Webinar interface. On the far right, a vertical control panel is expanded, displaying four icons: an orange button with a white right-pointing arrow, a telephone handset icon, a document icon, and a hand icon with a green arrow pointing up. The main content area shows the 'Audio' control panel with the following information:

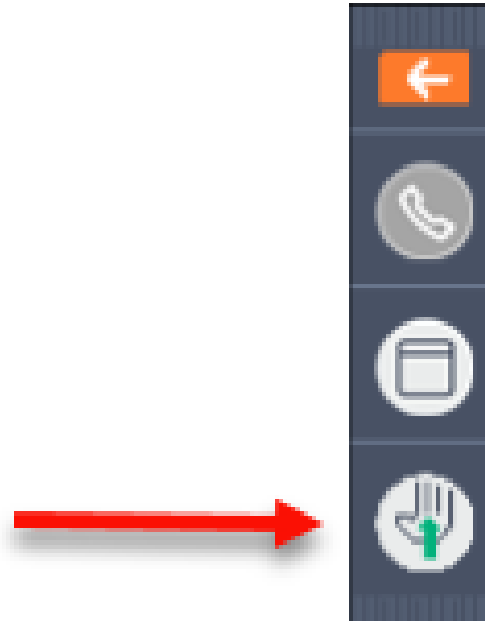
- File View Help
- Audio
- Computer audio (unselected)
- Phone call (selected)
- Dial: +1 (415) 930-5321
- Access Code: 481-480-569 #
- Audio PIN: 60 #
- Problem dialing in?
- Talking:
- Questions
- test
- Webinar ID: 271-969-851
- GoToWebinar logo

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
- * You can raise your hand if you would like us to take you off mute so you can speak
- * You can type in question in the question box

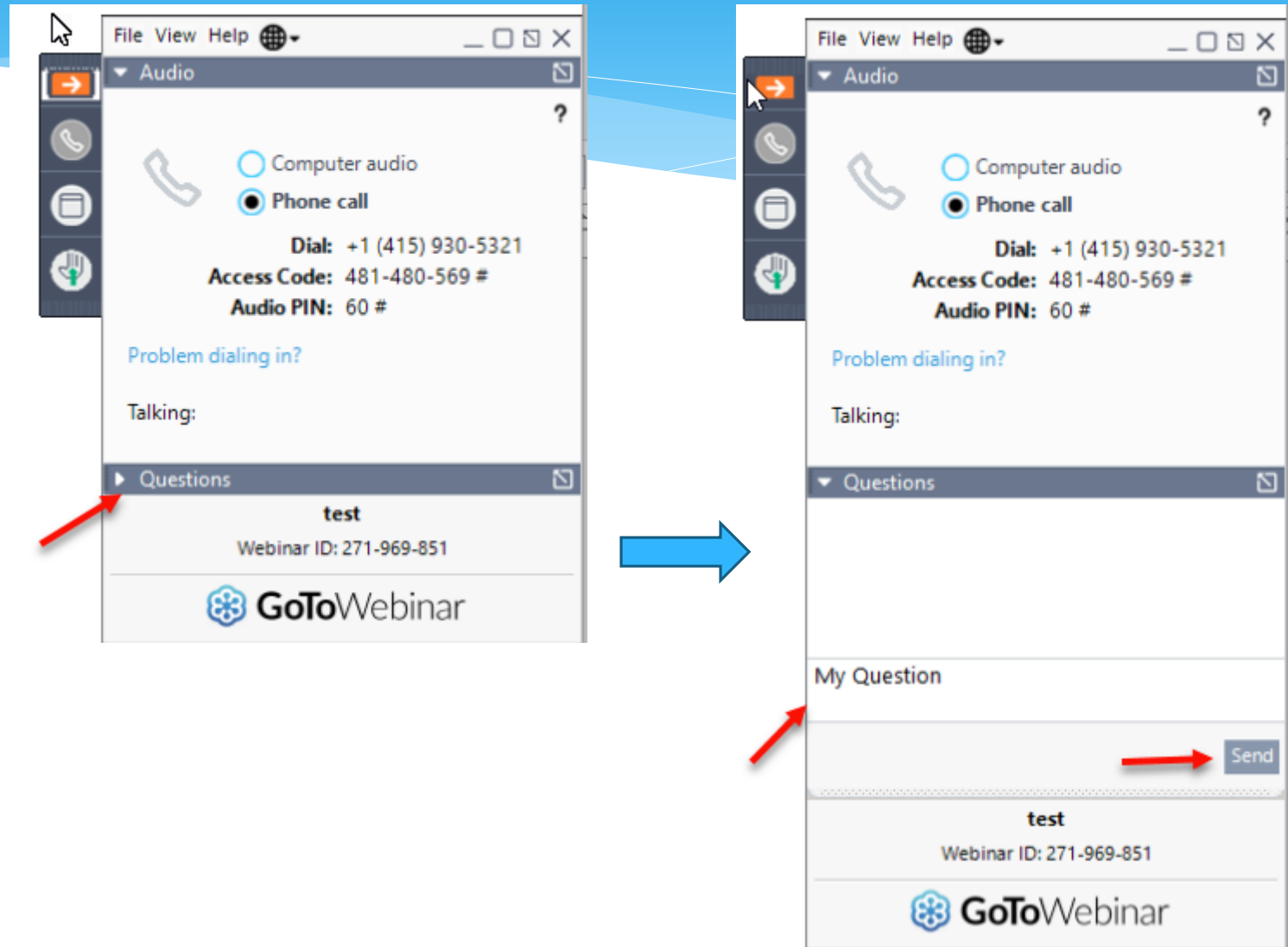
Raising your hand

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

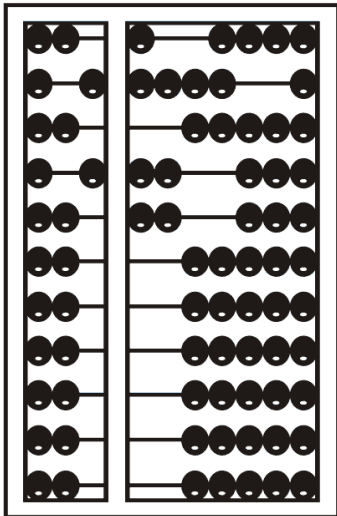


Typing in a Question

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



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



CPSE Portal Initial Setup Agency Administrators

TOPICS COVERED

- ❖ **Accepting Invitation** – [slide 9](#)
 - ❖ Therapists that work for multiple agencies have one login
- ❖ **NPI/NPI Lookup** – [slide 10](#)
- ❖ **Inviting Therapists To Use Portal** – [slide 11](#)
 - ❖ Licensed professionals vs other service providers
 - ❖ License #
 - ❖ Inviting multiple users – [slide 15](#)
 - ❖ Uploading spreadsheet
 - ❖ Portal profession codes – [slide 16](#)
- ❖ **Inviting Agency Staff To Use Portal** – [slide 21](#)
 - ❖ Office user vs Billing admin
- ❖ **Agency Billing Provider Profile** – [slide 24](#)
- ❖ **Portal Admin User Access** – [slide 26](#)
 - ❖ Billing Staff/Office Provider Role
 - ❖ Supervisor Role
- ❖ **Resetting Forgotten Password** – [slide 28](#)
- ❖ **Changing Your Password** – [slide 29](#)
- ❖ **Choosing Your PIN** – [slide 30](#)
 - ❖ My Profile
- ❖ **Edit My User Information** – [slide 31](#)
- ❖ **My Articles/News Feed** – [slide 32](#)
- ❖ **Knowledge Base** – [slide 33](#)
- ❖ **Upcoming Webinars** – [slide 34](#)
- ❖ **Closing Remarks and CPSE Portal Support Information** – [slide 35](#)

CPSE Portal



Hello, kkr [redacted]. You are currently logged in for **ADMIN** (Logout)



- Home
- Activities ▾
- IEP ▾
- eSTACs ▾
- Attendance ▾
- Billing ▾
- Lookup ▾
- Documents ▾
- Reports ▾
- Maintenance ▾
- Medicaid Service Bureau ▾
- Medicaid ▾
- People ▾
- My Account ▾
- Knowledge Base

Hide

User Profile

Username: **kknowles**
First Name:
Last Name:
Email: **kknowles@jmcguinness.com**

[Edit User Account](#)

News Feed

[View All Your Articles](#)

[New CPSE Portal features for 2020-2021](#)

7/7/2020 [more](#)

A new version of CPSE Portal arrives on 7/8

[dismiss](#)

Portal Invitation Process for Agency

- * The agency is the primary link between the CPSE Portal & service providers.
- * The agency will be sent an email invitation to join the Portal.
- * You will click the link in the email and setup your password and PIN.
- * Ensure NPI/BEDS code are correct.
- * Billing providers will need to create a PIN for submitting vouchers to the county.
- * An agency will get **one** invitation, and then they can invite staff as appropriate.
- * If you already use the Portal, the county will link your current logon to their county.
- * When inviting service providers, **make sure** that their **NPI, license number, and email address** are correct. This is especially important when a service provider works for multiple agencies.

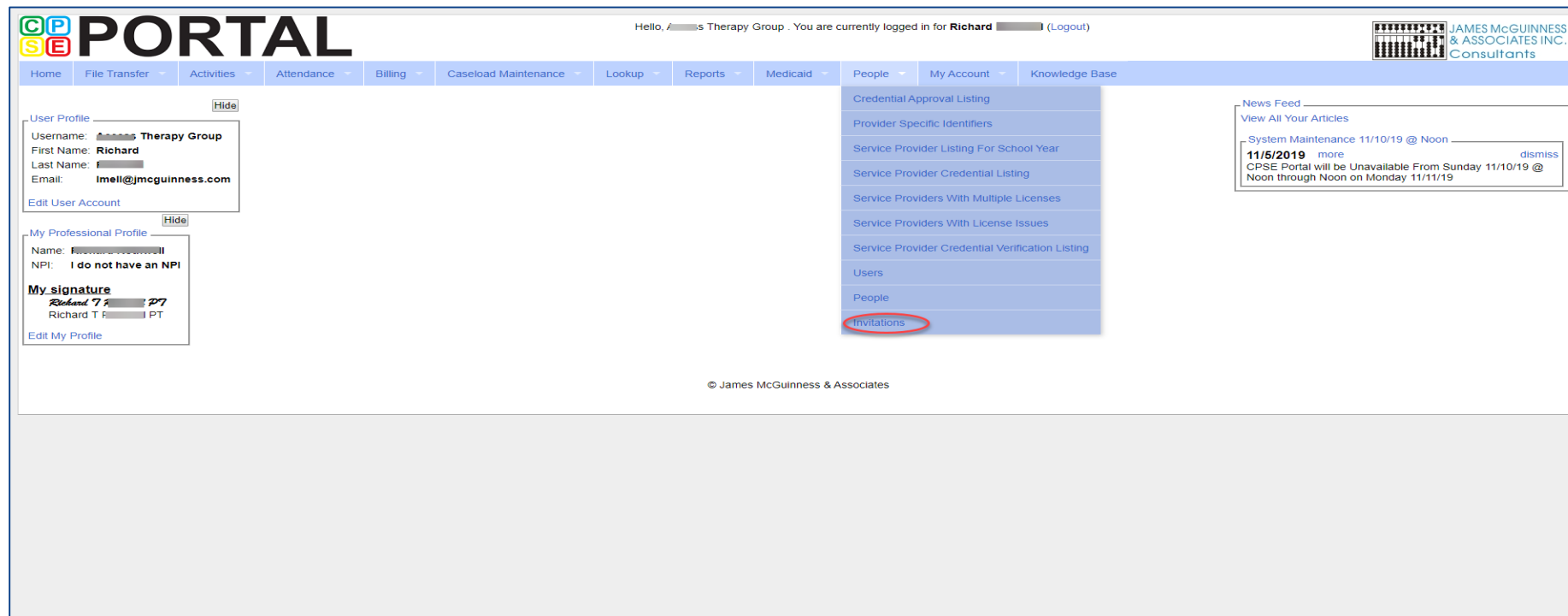
NPI Lookup

If you need to invite a service provider and do not know their NPI #, you can search for them using the NPI Lookup feature on the Lookup Menu.

The image shows two screenshots from the CPSE PORTAL. The left screenshot displays a 'Lookup' dropdown menu with the following options: Child Lookup, Enrollment Lookup, ICD9 to ICD10 GEMS, ICD Code Lookup, NPI Lookup (highlighted with a red arrow), NPI Search, SED Lookup, Provider Lookup, Rescinded CB Enrollments w/ CBRS, View Unmatched Enrollments, Person Lookup, and User Lookup. The right screenshot shows the 'NPI Lookup' form with the following fields: NPI, EIN, Organization Name, Other Organization Name, Last Name, First Name, Other Last Name, Other First Name, and License Number. A 'Search' button is located at the bottom right of the form. The portal header includes 'CPSE PORTAL' and a user greeting 'Hello, [Name]. You are'. The navigation bar includes links for Home, Activities, IEP, eSTACs, Attendance, Billing, and Lookup. The footer includes the copyright notice '© James McGuinness'.

Portal Invitations – Single Service Provider Invite

Agencies will send an invitation to a Service Provider. A service provider is a person who is an individual who provides services to the child. To send an invitation, go to People > Invitations.



The screenshot displays the CPSE Portal interface. At the top left is the CPSE PORTAL logo. The top right shows the user is logged in as Richard. A navigation bar contains links for Home, File Transfer, Activities, Attendance, Billing, Caseload Maintenance, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The 'People' dropdown menu is open, with 'Invitations' highlighted by a red circle. On the left, the 'User Profile' section shows details for Richard, including his email imell@jmcguinness.com and an 'Edit User Account' link. Below it, the 'My Professional Profile' section shows 'I do not have an NPI' and a signature for Richard T. On the right, a 'News Feed' section contains a system maintenance announcement for 11/5/2019.

Portal Invitations – Single Service Provider Invite

After you click Invitations, the following screen appears. Fill in all of the service providers information. Note that the service providers name & credentials will appear next to their NPI #. Make sure this information is correct before clicking “Send Invite.”

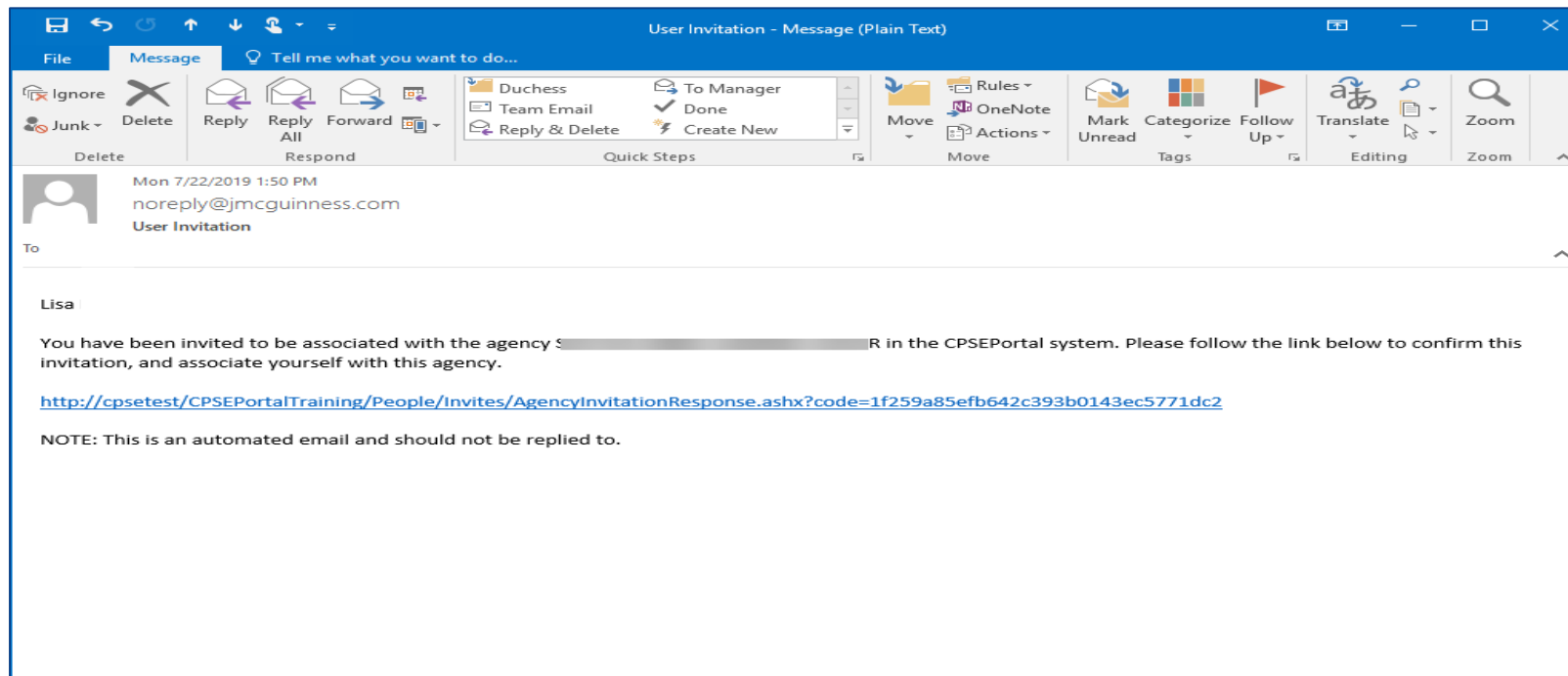
The screenshot shows a web form titled "Invite Someone" with the following fields and values:

- First Name: Lisa
- Last Name: Smith
- Email: Lsmith@gmail.com
- Confirm Email: Lsmith@gamil.com
- Provider: INC
- User Type: Service Provider
- Profession: OT - Licensed Occupational Therapist
- NPI: 1083193270
- NYS License Number: 013595

A green tooltip is visible next to the NPI field, displaying "LISA SMITH, DOT, OTR". A red circle highlights the "Send Invite" button at the bottom right of the form.

Portal Invitations – Single Service Provider Invite Sample Email

After the agency sends out the invitation, the service provider will receive the following email. The service provider will click the link to set up their account in the Portal.



Portal Invitations – Single Provider Invite

Accepting Invitation

This screen comes up after the service provider clicks the link. The service provider will confirm everything that is shown with the red arrow, and will fill in all the yellow arrow information and then click the “**Accept Invitation**” button. At this point, the invitation process is complete.

The screenshot shows the CPSE Portal Invitation acceptance screen. The page header includes the CPSE PORTAL logo, a (Login) link, and the logo for JAMES MCGUINNESS & ASSOCIATES INC. Consultants. The main content area is titled "CPSEPortal Invitation" and contains the following sections:

- Name Confirmation - Confirm this information is correct.** This section includes fields for "First Name" and "Last Name", both of which are pointed to by red arrows.
- Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.** This section includes fields for "NPI", "Profession" (with "OT - Licensed Occupational Therapist (062)" selected), "NYS License Number", and "Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP)". Red arrows point to the "Profession" and "NYS License Number" fields, while a yellow arrow points to the "Signature, Title, and Credentials" field.
- Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.** This section includes an "Email" field pointed to by a yellow arrow.
- User Account Information** This section includes fields for "Username", "Password", and "Confirm Password". Yellow arrows point to the "Username", "Password", and "Confirm Password" fields.

At the bottom of the form is a blue "Accept Invitation" button. The footer of the page contains the copyright notice "© James McGuinness & Associates".

Portal Invitations – Invite Multiple Users

- * As an alternative the agency can also invite “multiple” service providers at once by completing the template shown below. When complete, this template is imported and all service providers listed in the template will receive the email invitation. Service provider information needed is: *First Name, Last Name, Email, NPI & Profession Code.*

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Email	Provider Specific ID	NPI	Profession Code	NY License	License From Date	License To Date
2									
3									
4									
5									
6									

- * Additional information can be found in the Knowledge Base:
- * <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175> or (search for “template” or invitations”).

Portal Profession Codes

- * The Portal Profession Codes must be entered on the template and can be found in the Knowledge Base article below.
- * <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175> or (search for “template” or invitations”).

The list of profession codes that can be used:

Profession Code	Description
AIDE	Classroom or 1:1 AIDE
AUD	Audiologist
CFY	Clinical First Year
COTA	Certified Occupational Therapist Assistant
CSP	Certified School Psychologist
CSW	Clinical Social Worker
INT	Bilingual Interpreter
LCSW	Licensed Clinical Social Worker
LMSW	Licensed Master Social Worker
LPN	Licensed Practical Nurse
MUS	Music Therapist
OT	Occupational Therapist (Registered)
OTA	Occupational Therapist Assistant
PSY	Licensed Psychologist
PT	Physical Therapist
PTA	Physical Therapist Assistant
RN	Registered Nurse
SLP	Speech & Language Pathologist
SPED	Special Education Teacher
TD	Teacher of the Deaf
TEACH	Teacher
TSHH	Teacher of Speech & Hearing Handicapped
TSLD	Teacher of Speech & Language Disabilities
TVI	Teacher of the Visually Impaired

Invitations – Multiple User Template

To send an invitation using the template, go to People > Invitations.

People ▾	My Account ▾	Knowledge Ba
Credential Approval Listing		
Provider Specific Identifiers		
Service Provider Listing For School Year		
Service Provider Credential Listing		
Service Providers With Multiple Licenses		
Service Providers With License Issues		
Service Provider Credential Verification Listing		
Users		
People		
Invitations		


Invitations – Multiple User Template

You will then choose Import Invitation Batch File.

Manage Invitations

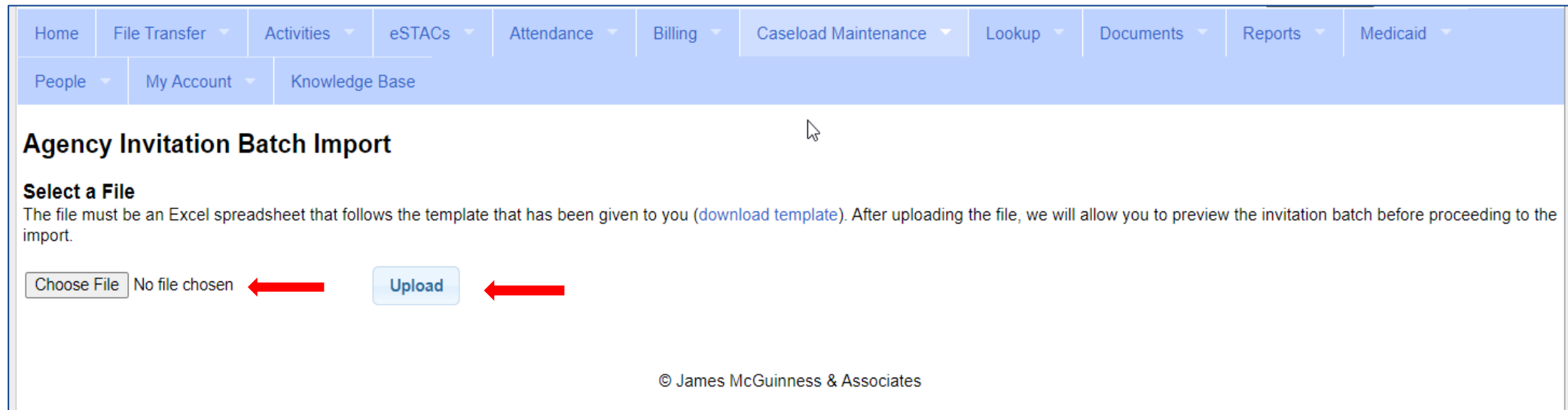
User Type Show Only Pending

No invitations found.



Invitations – Multiple User Template Upload Template

You will then click Choose File, find your template, and click Upload.





The screenshot shows a web application interface with a navigation menu at the top. The menu includes items like Home, File Transfer, Activities, eSTACs, Attendance, Billing, Caseload Maintenance, Lookup, Documents, Reports, and Medicaid. Below the menu, there are sections for People, My Account, and Knowledge Base. The main content area is titled 'Agency Invitation Batch Import' and contains a 'Select a File' section. This section includes a text prompt: 'The file must be an Excel spreadsheet that follows the template that has been given to you (download template). After uploading the file, we will allow you to preview the invitation batch before proceeding to the import.' Below the text, there is a 'Choose File' button, the text 'No file chosen', and an 'Upload' button. Two red arrows point to the 'Choose File' and 'Upload' buttons respectively. At the bottom of the page, there is a copyright notice: '© James McGuinness & Associates'.

Home File Transfer ▾ Activities ▾ eSTACs ▾ Attendance ▾ Billing ▾ Caseload Maintenance ▾ Lookup ▾ Documents ▾ Reports ▾ Medicaid ▾

People ▾ My Account ▾ Knowledge Base

Agency Invitation Batch Import

Select a File
The file must be an Excel spreadsheet that follows the template that has been given to you ([download template](#)). After uploading the file, we will allow you to preview the invitation batch before proceeding to the import.

Choose File No file chosen  Upload 

© James McGuinness & Associates

Invitations – Multiple User Template

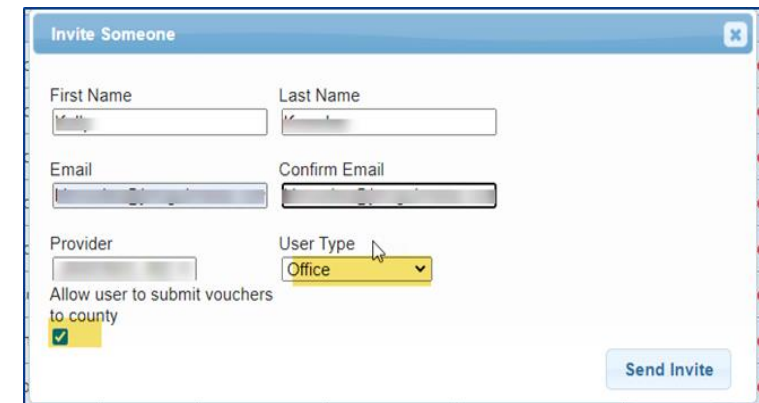
Preview Invitations

- * This screen will show problems as well as successful imported entries.
- * Click either “Accept & Send Invites” or “Decline & Cancel”.

Agency Invitation Batch Import								
Invites Preview - Accept or Decline?								
Invalid Invites - Will NOT be imported								
First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	Name in NPI Registry	NY License Number	Invalid Reason
Barb	Jones	bj@cpseportal.com	N	SPED				"NPI" must be valid
Valid Invites - Will be imported & sent								
First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	Name in NPI Registry	NY License Number	
BROOKE	DEMNER	bd@cpseportal.com	N	OT	1003003567	MS. BROOKE DEMNER, OTR	123456	
Christina	LOEWENSTEIN	cl@cpseportal.com	N	OT	1003004102	LAURIE CHRISTINA LOEWENSTEIN, OTR	556677	
Jen	Owen-Jones	jo@cpseportal.com	N	OT	1003011255	JENNIFER JEAN OWEN, OTR	888222	
NEREIDA	Wright	nw@CPSEportal.com	N	SLP	1003001595	DR. NEREIDA IRENE HILLYER-WRIGHT, PH.D.	554433	
<input type="button" value="Accept & Send Invites"/> <input type="button" value="Decline & Cancel"/>								

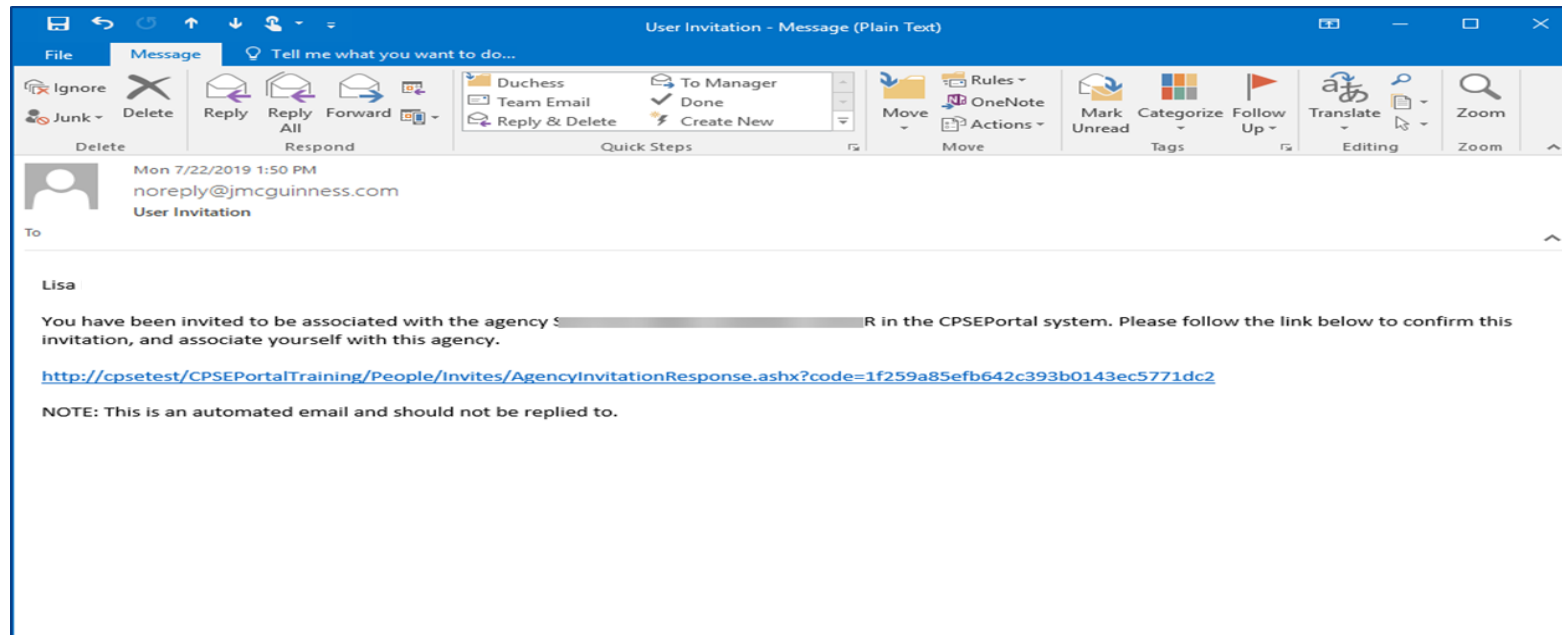
Portal Invitation – Office User

- * To send an invitation to office staff who will be using the Portal, go to People > Invitations.
- * The next screen will then be to Invite Someone.
- * Enter all information on this screen, and your User Type will be “Office”.
- * If your Office user will be submitting vouchers to the county, then you will need to check the box “Allow user to submit vouchers to county”.

A screenshot of the 'Invite Someone' form in the portal. The form contains several input fields: 'First Name', 'Last Name', 'Email', and 'Confirm Email'. Below these is a 'Provider' field and a 'User Type' dropdown menu with 'Office' selected. At the bottom left, there is a checkbox labeled 'Allow user to submit vouchers to county' which is checked. A 'Send Invite' button is located at the bottom right of the form.

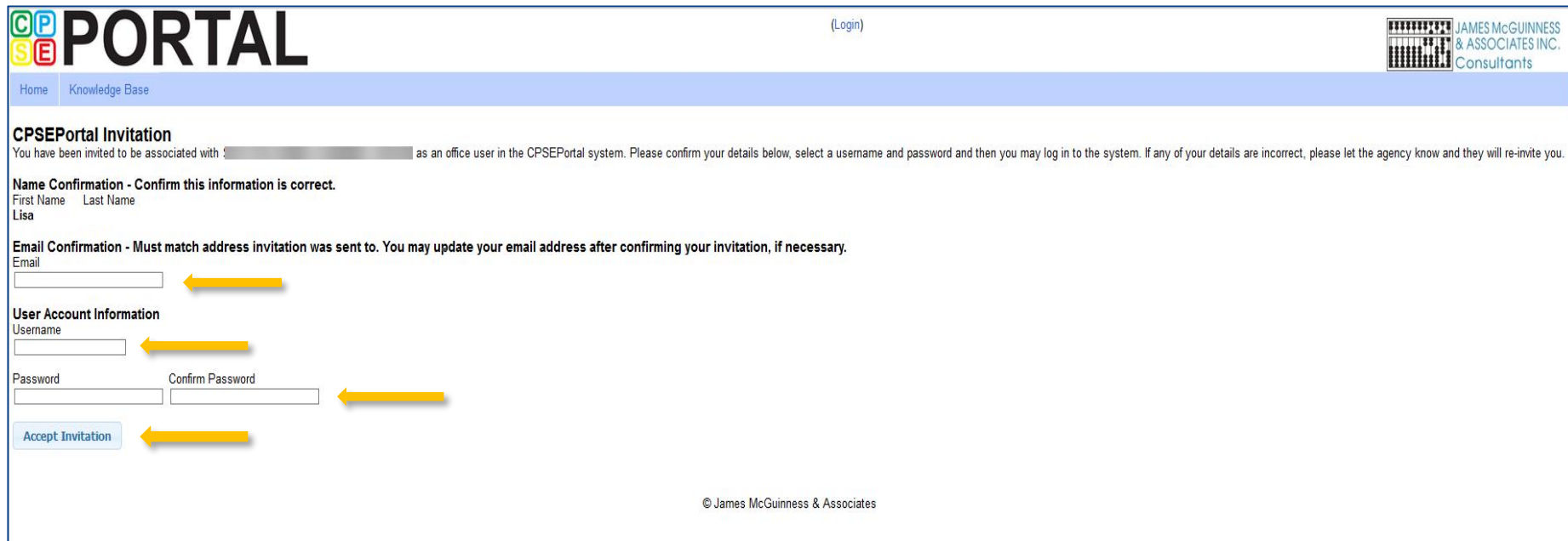
Portal Invitation – Office User

After the agency sends out the invitation, the office user will receive the following email. The office user will click the link, to set up their account in the Portal.



Portal Invitation – Office User

This screen comes up after the office user clicks the link. The office user will fill in the information below and then click the “Accept Invitation” button. At this point, the invitation process is complete.



CPSE PORTAL (Login) JAMES McGUINNESS & ASSOCIATES INC. Consultants

Home Knowledge Base

CPSEPortal Invitation

You have been invited to be associated with [redacted] as an office user in the CPSEPortal system. Please confirm your details below, select a username and password and then you may log in to the system. If any of your details are incorrect, please let the agency know and they will re-invite you.

Name Confirmation - Confirm this information is correct.
First Name Last Name
Lisa

Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.
Email

User Account Information
Username

Password Confirm Password

© James McGuinness & Associates

Agency Billing Provider Profile

- * Agencies will need to create a Billing Provider Profile.
- * Go to My Account > Billing Provider Profile



Agency Billing Provider Profile

All information entered on this screen will be the agencies information only.

Billing Provider Profile

Provider Info | **User Information**

Billing Provider
Name:

Billing Address
Address 1:
Address 2:
City: State: NY Zip:
Phone Number:

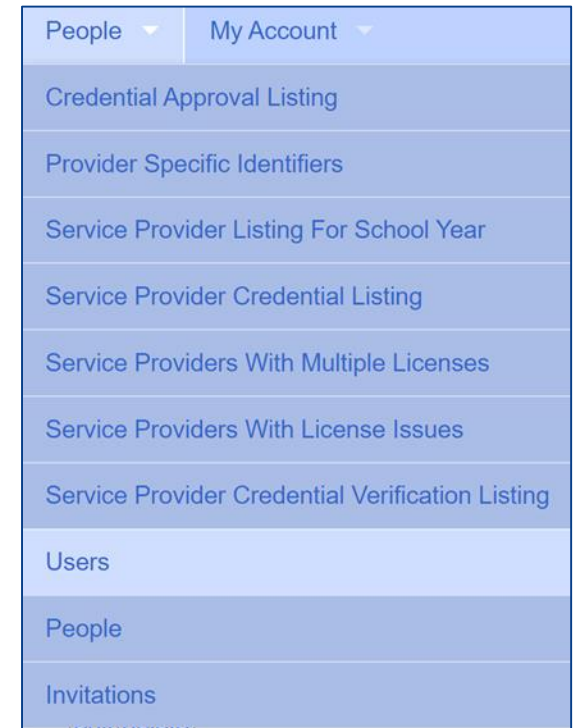
Information from NPPES NPI Registry
[Click here for NPPES website](#)

NPI: This NPI is for an
Organization Name:
Mailing Address 1:
Mailing Address 2:
City: State: NY Zip:

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	252Y00000X	Agencies	Early Intervention Provider Agency			

Portal Admin- User Access

- * Go to People > Users
- * Within User Access:
 - * See all users assigned to your agency
 - * Assign role of Billing Staff
 - * Assign role of Service Provider
 - * Remove access to Portal or delete provider or roles



Portal Admin- User Access

Viewing/changing Existing Users

You will check off if a staff member is a Service Provider, Supervisor, a Basic User or a Billing Admin. Some staff may have more than 1 box checked.


Users
 Provider

Username	First Name	Last Name	Email	Associated Person	Service Provider	Supervisor	QA Supervisor	Basic	Billing Admin		
ALEXA.FLANAGAN12			demo@cpseportal.com	FLANAGAN, ALEXA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	update cancel	delete
RIKKI.PUCKETT10516	Josephine	Acheta	demo@cpseportal.com	PUCKETT, RIKKI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
RINA.DOWNING10517	Cathy	Campbell	lmell@jmcguinness.com	DOWNING, RINA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
PENEL.BUCKLEY12095	Wendy	Hill	demo@cpseportal.com	BUCKLEY, PENELOPE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MITCH.WHEELER14250	Katherine	Agard	demo@cpseportal.com	WHEELER, MITCHELL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
BARBR.MCKEE798	RUTH	AGNE	demo@cpseportal.com	MCKEE, BARBRA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
ABIGA.COTTON10257	Aimee	Alvarez	demo@cpseportal.com	COTTON, ABIGAIL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MINA.GILLESPIE3614	Abigail	Andrews	demo@cpseportal.com	GILLESPIE, MINA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete

- Admin-(management/administrators) can submit vouchers on behalf of the agency
- Basic- (clerical/billing staff)
- Supervisor (UDO/USO)
- QA Supervisor (quality assurance supervisor)

Resetting Forgotten Passwords

- * If you have forgotten your password you do not need to contact CPSE Portal support. You can reset your own password by using the Forgot Your Password? link on the Log In screen.
- * On the Password Recovery page, enter your user name and click Submit. You will be emailed a new password.
- * <http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316>



CPSE PORTAL (Login)

Home Knowledge Base

Log In

User Name: *

Password: *

Remember me next time.

[Forgot your password?](#)



Password Recovery

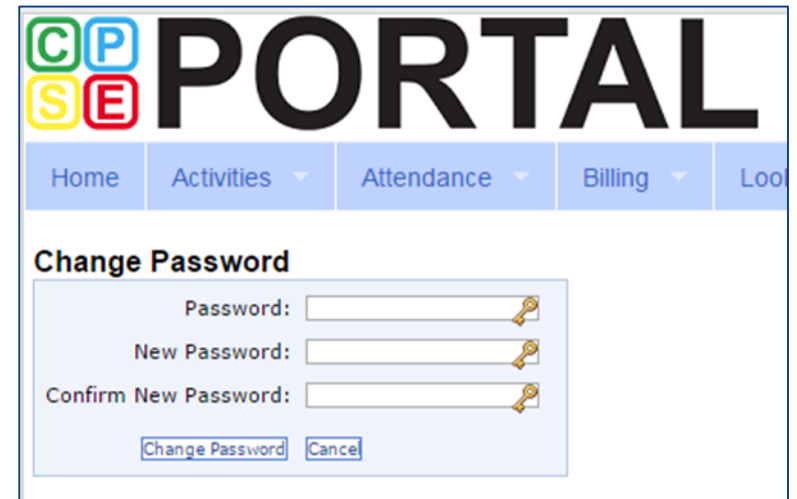
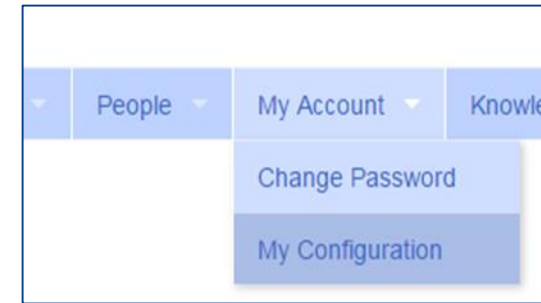
Forgot Your Password?

Enter your User Name to receive your password.

User Name:

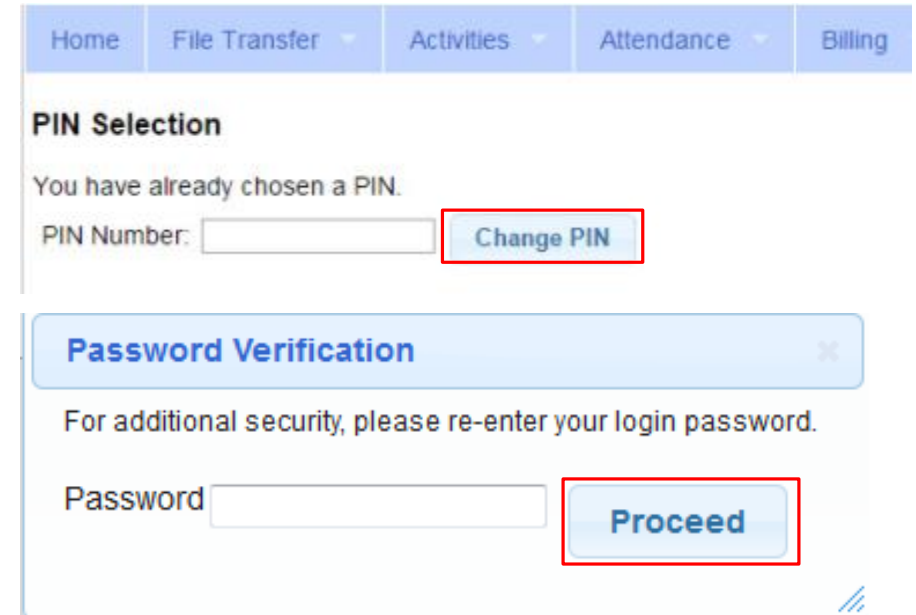
Changing Your Password

- * Go to My Account > Change Password.
- * Enter your current password in the password field.
- * Enter your New Password.
- * Re-enter your New Password to confirm it was entered correctly.
- * <http://support.cpseportal.com/kb/a14/change-password.aspx?KBSearchID=16315>

A screenshot of the CPSE Portal 'Change Password' form. The portal logo 'CPSE PORTAL' is at the top left. A navigation bar contains 'Home', 'Activities', 'Attendance', 'Billing', and 'Look'. The form title is 'Change Password'. It contains three password input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a key icon on the right. At the bottom, there are two buttons: 'Change Password' and 'Cancel'.

Choosing Your PIN

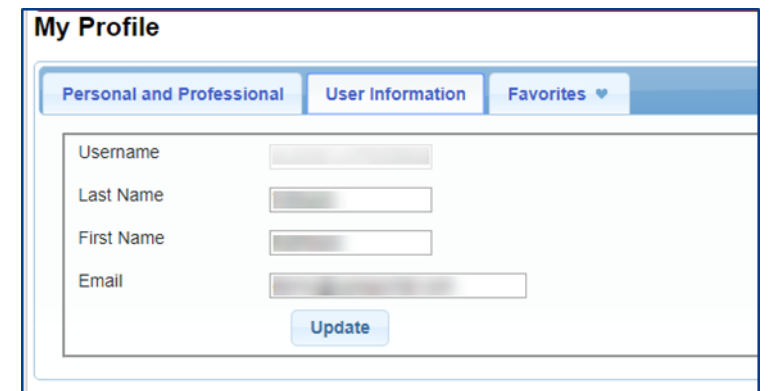
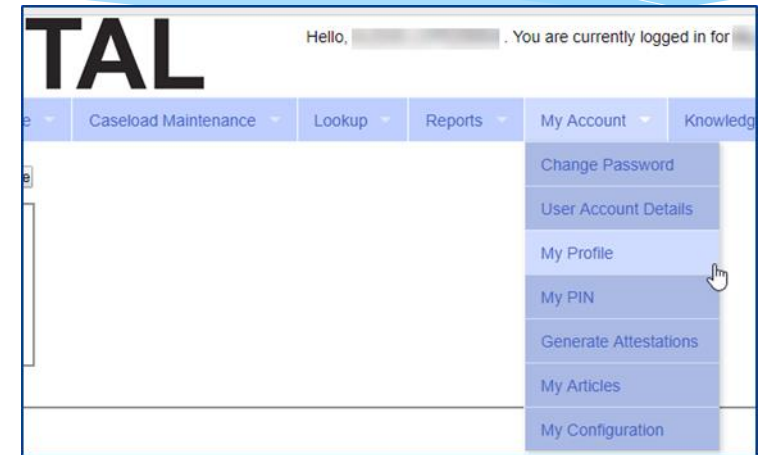
- * Choosing PIN: My Account > My Pin
- * Enter your PIN number and click the button (“Choose PIN” for first time PIN setup, “Change PIN” for changing current PIN)
- * Enter your **login password** (**NOT** your pin) to confirm your PIN change and click “Proceed”
 - * <http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>



The screenshot shows a web interface with a navigation bar at the top containing links for Home, File Transfer, Activities, Attendance, and Billing. Below the navigation bar is a section titled "PIN Selection" with the text "You have already chosen a PIN." and a "PIN Number:" label next to an input field. A red box highlights the "Change PIN" button. Below this is a "Password Verification" section with a close button (X) and the text "For additional security, please re-enter your login password." and a "Password" label next to an input field. A red box highlights the "Proceed" button.

Edit My User Information

- * My Profile: My Account>My Profile & click on “User Information” tab.
- * This screen may be used to update user name and/or email address.
- * Click “Update” and you will receive the following message: User Information Updated Successfully
- * My Profile:
 - * <http://support.cpseportal.com/kb/a59/edit-my-user-information.aspx?KBSearchID=16250>

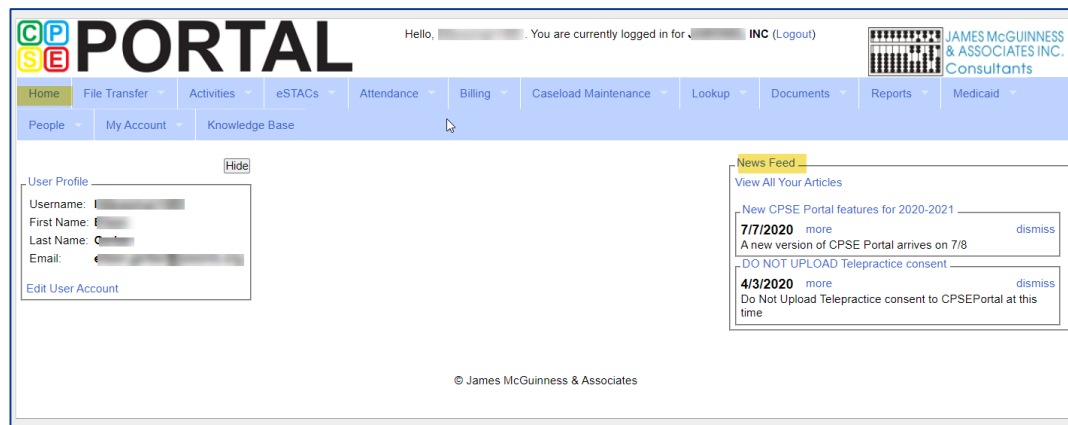
A screenshot of the 'My Profile' page in the TAL application. The page has three tabs: 'Personal and Professional', 'User Information' (which is active), and 'Favorites'. Below the tabs is a form with four input fields: 'Username', 'Last Name', 'First Name', and 'Email'. An 'Update' button is located at the bottom of the form.

News Feed / My Articles

News Feed contains current articles and updates to the Portal. News Feed can be found in 2 ways.

Your current News Feed will be located on your Home Page

For all News Feed articles:
My Account\My Articles\View



The screenshot shows the CPSE Portal Home Page. The top navigation bar includes links for Home, File Transfer, Activities, eSTACs, Attendance, Billing, Caseload Maintenance, Lookup, Documents, Reports, and Medicaid. A secondary navigation bar includes People, My Account, and Knowledge Base. On the left, there is a User Profile section with fields for Username, First Name, Last Name, and Email, along with an Edit User Account link. On the right, the News Feed section is highlighted, showing a list of articles with dates and links to view more or dismiss them.

CPSE PORTAL

Hello, [User Name]. You are currently logged in for [User Name] INC (Logout)

JAMES MCGUINNESS & ASSOCIATES INC. Consultants

Home | File Transfer | Activities | eSTACs | Attendance | Billing | Caseload Maintenance | Lookup | Documents | Reports | Medicaid

People | My Account | Knowledge Base

User Profile [Hide]

Username: [Redacted]
First Name: [Redacted]
Last Name: [Redacted]
Email: [Redacted]

Edit User Account

News Feed

View All Your Articles

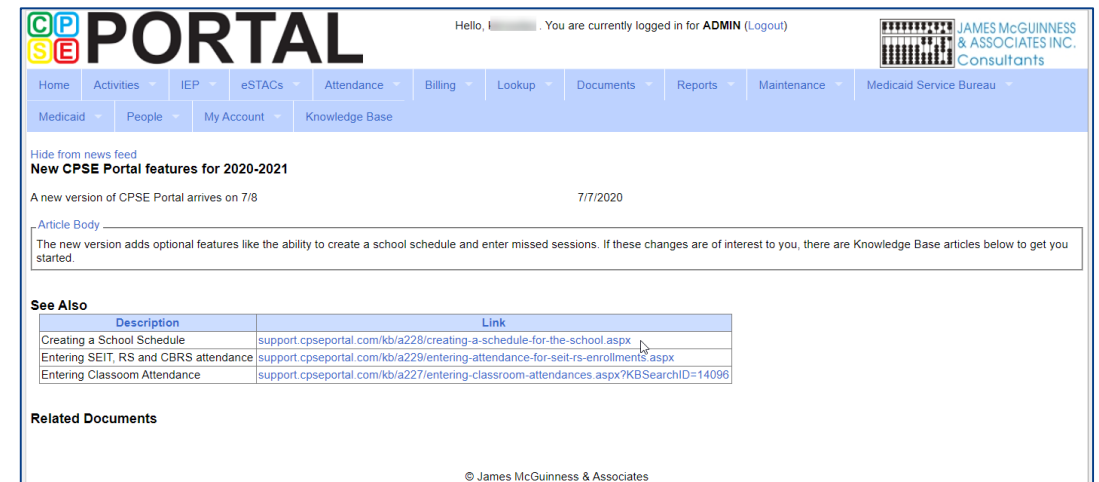
New CPSE Portal features for 2020-2021

7/7/2020 more dismiss
A new version of CPSE Portal arrives on 7/8

DO NOT UPLOAD Telepractice consent

4/3/2020 more dismiss
Do Not Upload Telepractice consent to CPSEPortal at this time

© James McGuinness & Associates



The screenshot shows the CPSE Portal My Account\My Articles\View page. The top navigation bar includes links for Home, Activities, IEP, eSTACs, Attendance, Billing, Lookup, Documents, Reports, Maintenance, and Medicaid Service Bureau. A secondary navigation bar includes Medicaid, People, My Account, and Knowledge Base. The main content area shows a list of articles with a table of 'See Also' links and a 'Related Documents' section.

CPSE PORTAL

Hello, [User Name]. You are currently logged in for ADMIN (Logout)

JAMES MCGUINNESS & ASSOCIATES INC. Consultants

Home | Activities | IEP | eSTACs | Attendance | Billing | Lookup | Documents | Reports | Maintenance | Medicaid Service Bureau

Medicaid | People | My Account | Knowledge Base

Hide from news feed

New CPSE Portal features for 2020-2021

A new version of CPSE Portal arrives on 7/8 7/7/2020

Article Body

The new version adds optional features like the ability to create a school schedule and enter missed sessions. If these changes are of interest to you, there are Knowledge Base articles below to get you started.

See Also

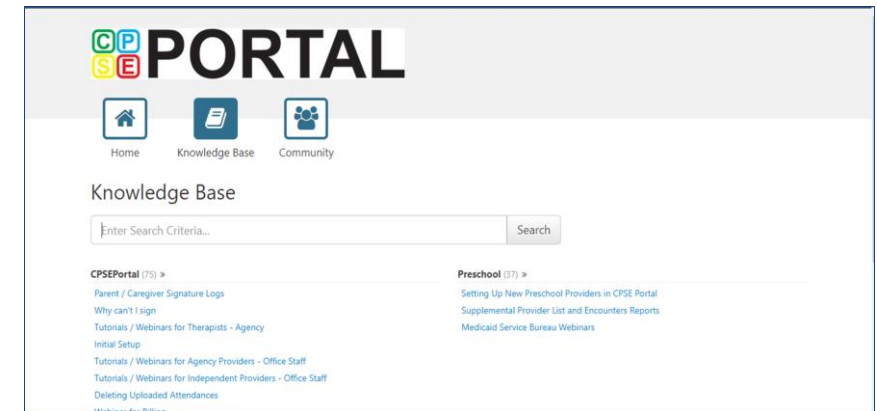
Description	Link
Creating a School Schedule	support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx
Entering SEIT, RS and CBRS attendance	support.cpseportal.com/kb/a229/entering-attendance-for-seit-rs-enrollments.aspx
Entering Classroom Attendance	support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=14096

Related Documents

© James McGuinness & Associates

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>



Upcoming Webinars

- Initial Set-Up (Independent Provider & Agency Service Providers)
5/26/21 @ 3:00 pm

<https://attendee.gotowebinar.com/register/1008342737561589518>

- Initial Set-Up (Independent Provider & Agency Providers) 6/01/21 @
11AM

<https://attendee.gotowebinar.com/register/1459254655135806478>

- Credential Verification (All Users) 6/2/21 @ 3:00 pm

<https://attendee.gotowebinar.com/register/6041925661217855758>

- Credential Verification (All Users) 6/3/21 @ 11:00 am

<https://attendee.gotowebinar.com/register/5926279028208388622>

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 Helpdesk is available through email at support@CPSEPortal.com