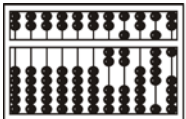


# CPSE Portal

Introduction for Providers

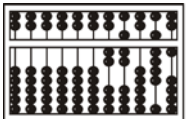


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# Webinar Basics

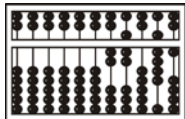
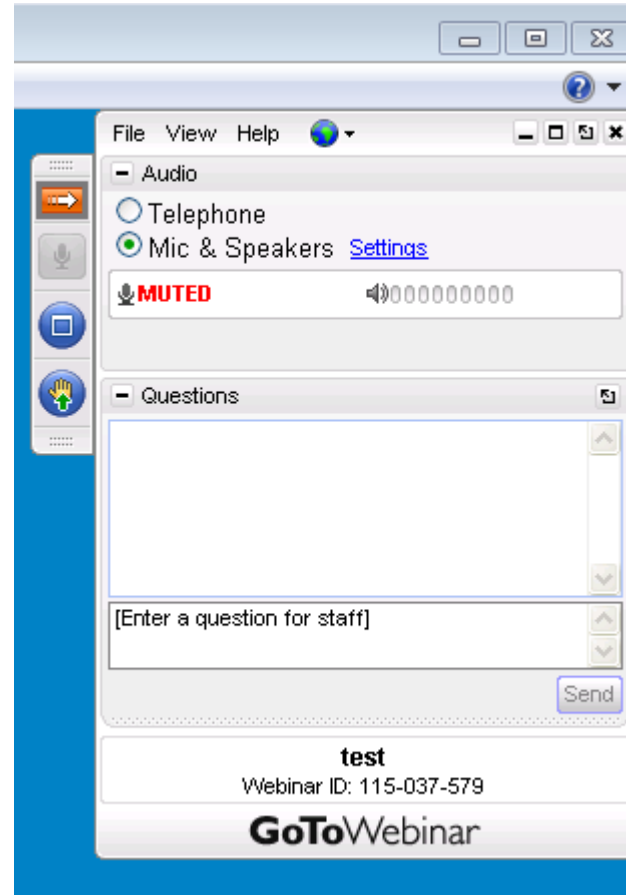
- ▶ The control panel
- ▶ Hiding / Showing the control panel
- ▶ Raising your hand
- ▶ Typing a question



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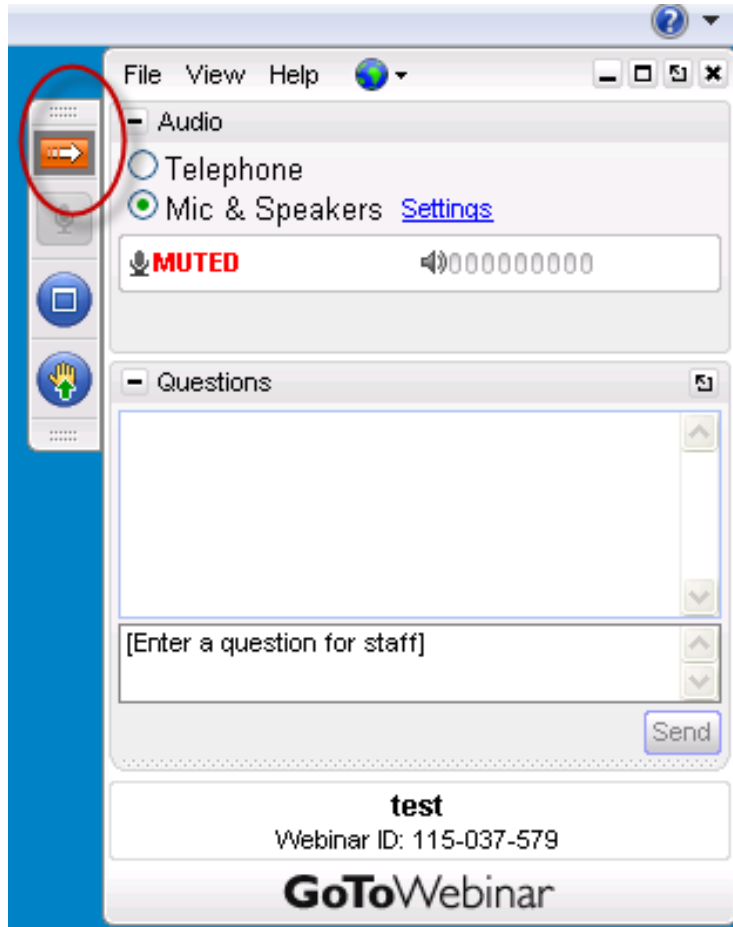
# Control Panel



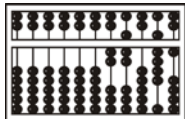
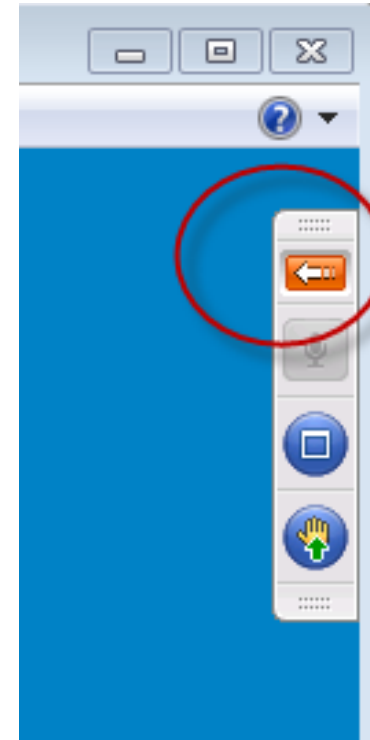
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# Hiding and showing the control panel



Click the orange button with the white arrow to toggle the control panel between hidden and displayed

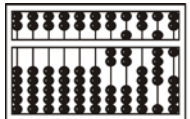
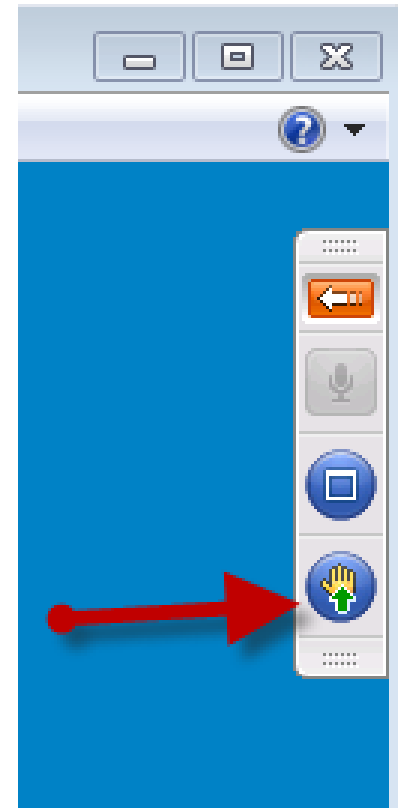


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# Raising your hand

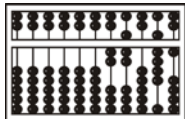
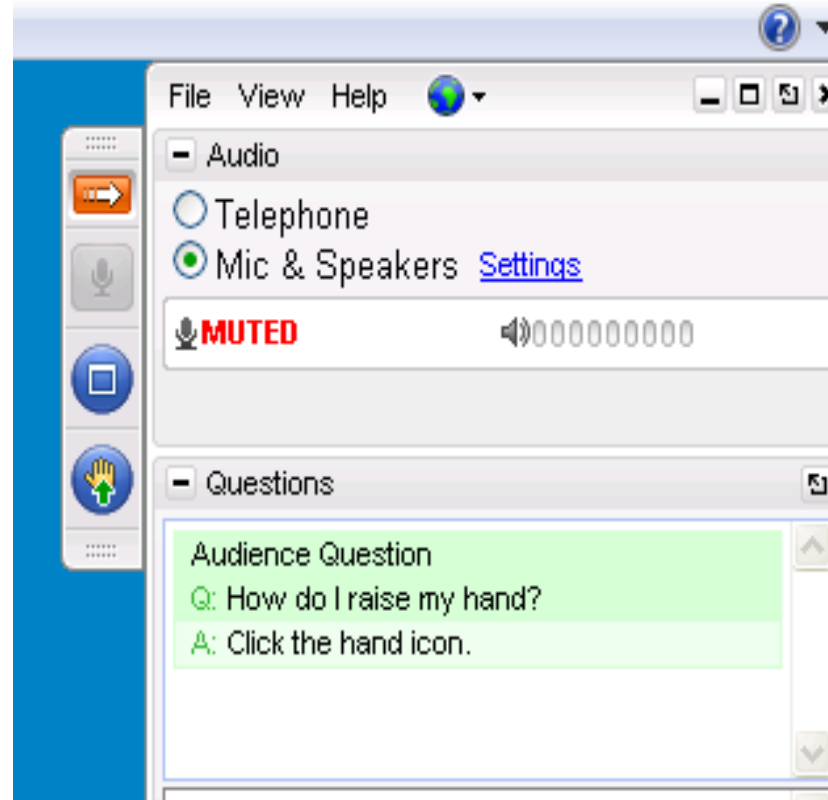
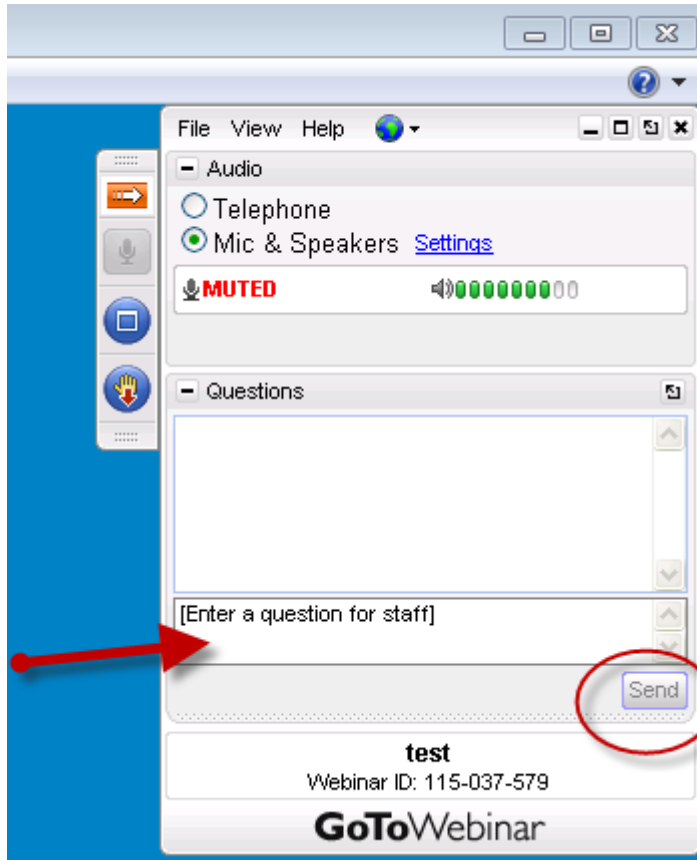
- ▶ Click the little hand icon on the control panel tab



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# Asking a question electronically

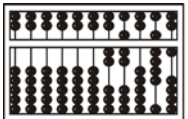


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# Webinar Outline

- ▶ Background
- ▶ Who we are
- ▶ What is CPSE Portal
- ▶ How does data get into CPSE Portal
- ▶ Overview of how it works
- ▶ Timing
- ▶ Next steps
- ▶ Q & A



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# Background

- ▶ We currently provide software to your County to manage the various processes related to the CPSE process. Many of these are centered around fiscal concerns including paying providers and billing Medicaid
- ▶ SED and DOH are continually adding more rules and regulations making this process more difficult.
- ▶ In order to address changes and streamline their operations, the County is deciding to utilize a module of ours named CPSE Portal.
- ▶ Providers will use CPSE Portal to submit attendance and billing to the County electronically
- ▶ There is no charge to the providers to use CPSE Portal

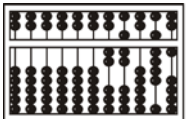


# Who we are

- ▶ James McGuinness and Associates
- ▶ Established in 1979
- ▶ Software development
- ▶ Preschool software for Counties that is used by over 30 NYS Counties (over 15 years)
- ▶ CLAIMS - Agency management software used by many NYS providers
- ▶ Experience with Early Intervention
- ▶ Experience with Electronic Billing
- ▶ Experience with Medicaid claiming

# What is CPSE Portal

- ▶ A web based portal that provides a mechanism for exchanging data between the County and providers (<https://www.CPSEPortal.com>)
- ▶ Provides for collecting attendance and billing information
- ▶ Captures digital signatures
- ▶ Provides electronic billing services
- ▶ Also supports Medicaid related information
- ▶ Linked to County Preschool data management system

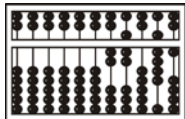


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# CPSE Portal is not CLAIMS/Enter Claims

- ▶ We market a product to agencies named CLAIMS
- ▶ There is a module for CLAIMS called Enter CLAIMS that captures attendance from therapists via a web browser
- ▶ CPSE Portal is an entirely different system
- ▶ CPSE Portal is a web based interface to link to the County's Preschool software system
- ▶ There is no charge to providers to use CPSE Portal

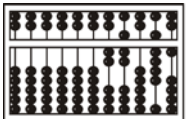


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# How does data get into CPSE Portal

- ▶ Users can data enter into website.
- ▶ Agencies that use CLAIMS / EnterCLAIMS can upload data in a file to CPSEPortal
- ▶ Agencies that use any other software package can also upload attendance data from their systems. File specifications are available in the knowledge base.

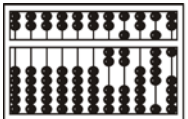


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# Process overview

- ▶ Providers either
  - ▶ Enter attendance information for enrollments
  - ▶ And provide a digital signature to the attendanceor
  - ▶ Upload digitally signed attendances from their own electronic attendance/notes system
- ▶ Billing Provider creates an electronic voucher from these attendance entries
- ▶ Billing Provider then
  - ▶ digitally signs and submits electronic voucher to County
  - ▶ prints voucher summary sheets from CPSE Portal
  - ▶ submits paper voucher sheets to County (US mail, drop off, etc.)
- ▶ County user reviews, audits, processes and posts voucher to Preschool system



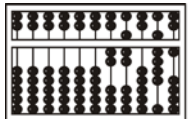
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# Demo

This is not a training webinar

- ▶ Entering Attendance
- ▶ Printing Voucher

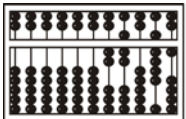


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# Billing Provider vs. Service Provider

- ▶ A Billing Provider (think Agency or School)
  - ▶ Can be an individual or corporation
  - ▶ Has a vendor contract with the County
  - ▶ Submits bills to County
  - ▶ Receives payment from County
- ▶ A Service Provider (think therapist)
  - ▶ Is an individual
  - ▶ Provides the services to the child
- ▶ An Independent Provider can be both a Billing Provider and Service Provider
- ▶ An Independent Provider can be incorporated and the Billing Provider is the corporate entity and the Service Provider is the individual person

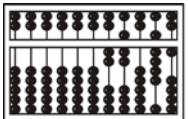


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# When will we start using CPSE Portal

- ▶ Attendance and Billing
  - ▶ For Center Based (tuition), SEIT/SEIS and Related services,
    - ▶ Service dates beginning 7/1/16
  - ▶ Evals
    - ▶ Service dates beginning 9/1/16



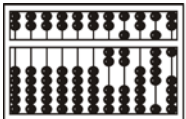
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# Timing

- ▶ April
  - ▶ Establish Agency admin user logon
  - ▶ Plan additional office staff users
  - ▶ Gather therapist/teacher information (Name, email, etc)
  - ▶ Training for Setup processes
  - ▶ For agencies looking to upload attendance from their own system, begin the process to create the upload file
- ▶ May
  - ▶ Setup users for Agency
  - ▶ Initial training webinars
- ▶ June
  - ▶ Training
  - ▶ Caseload maintenance / setup
- ▶ July
  - ▶ Enter Attendance
  - ▶ Billing Training
- ▶ August
  - ▶ Create and submit electronic bills



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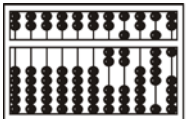
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# Billing Provider Account

- ▶ Initially, each contracted provider will be set up with Billing Provider admin Account to login to CPSE Portal
- ▶ This admin account is used to register other users that can access CPSE Portal under their provider. The system sends an electronic invitation to enroll.
- ▶ Types of provider users
  - ▶ Billing Provider
    - ▶ Basic
    - ▶ Admin
  - ▶ Service Provider (therapist, teacher, etc.)
    - ▶ Supervisor
- ▶ Independent providers will have their account marked as both a Billing Provider Administrator as well as a Service Provider

# Next steps

- ▶ Provider Setup Forms
  - ▶ NPI
  - ▶ Initial Admin User
- ▶ Prepare List of Administrative office users
  - ▶ Name, email
- ▶ Prepare List of Service Providers (teachers, therapists, etc.)
  - ▶ First name, last name, email, profession, NPI, NY License, Is Supervisor
  - ▶ <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-users.aspx>
- ▶ Decide if you will be uploading data or data entering
- ▶ If uploading data, contact your IT Vendor about uploading data



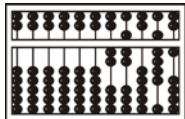
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# Creating Service Provider Accounts

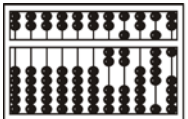
- ▶ In addition to creating individual invites, you can upload a spreadsheet with the following format, which can be downloaded from the knowledgebase.

	A	B	C	D	E	F	G
1	First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	NY License
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							



# Schema for Attendance File Upload

- ▶ <http://support.cpseportal.com/kb/a67/schema-for-attendance-file-upload.aspx>

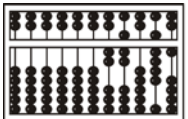


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# Future Webinars

- ▶ CPSE Portal Review of File Upload Specifications
  - ▶ Who:
    - ▶ Technical staff of agencies looking to upload data from their own system
  - ▶ When:
    - ▶ Tue April 19 @ 2:30 PM
- ▶ CPSE Portal - Inviting Users / Initial User Setup
  - ▶ Who:
    - ▶ Office staff of agencies
  - ▶ When:
    - ▶ Thu April 28 @ 2:30 PM
    - ▶ Wed May 4 @ 10:30 AM

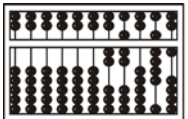


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# Additional Information

- ▶ CPSE Portal support site <http://support.cpseportal.com>
  - ▶ Knowledge Base Articles
- ▶ Email [support@CPSEPortal.com](mailto:support@CPSEPortal.com)



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