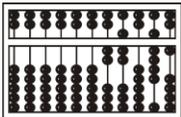


CPSE Portal and Medicaid Processing

Overview for Providers



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

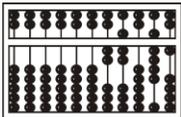
CPSE PORTAL

Who we are

- ▶ James McGuinness and Associates
- ▶ Established in 1979
- ▶ Software development
- ▶ Preschool software for Counties that is used by 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

Overview

- ▶ Medicaid processing
- ▶ Procedures for Medicaid processing
- ▶ CPSE Portal overview
- ▶ This is an introduction, we will be holding several webinars over the next few weeks
- ▶ Questions are great, but this is not a good forum for questions
- ▶ Instead,
 - ▶ take in this overview,
 - ▶ download this Powerpoint and review
 - ▶ Formulate your questions
 - ▶ Either submit them to the support system or wait for the webinars

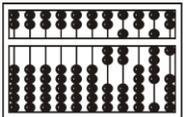


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

CPSE Portal

- ▶ A web based portal that provides a mechanism for exchanging data between the County and providers
- ▶ Typically used for billing data
- ▶ Also supports Medicaid related information

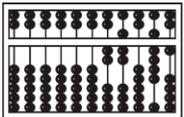


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Medicaid Processing - PSHSP Background

- ▶ NYS Counties pay providers for services provided to children in the Preschool (CPSE) program
- ▶ When all goes right (STACs in place, etc.) , the County gets reimbursed from SED for a portion of the cost
- ▶ Additionally, the County can claim for Medicaid reimbursement for certain direct medical services that are provided to children with Medicaid
- ▶ Any Medicaid reimbursement helps offset the financial burden to the County

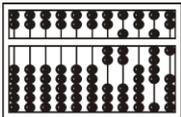


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE
PORTAL

Medicaid Processing Contract for Nassau

- ▶ Nassau contracts with an outside vendor to perform the Medicaid claiming processes
- ▶ The prior vendor's contract was for services through 12/31/2014.
- ▶ James McGuinness and Associates was awarded the contract for services beginning 1/1/2015.

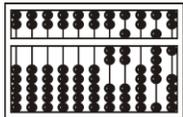


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE **PORTAL**

Medicaid Claiming - Goals

- ▶ Maximize Medicaid revenue
 - ▶ Timely filing
 - ▶ Error checking
 - ▶ Reduce rejections / denials
 - ▶ Collect documents sooner
- ▶ Increase accuracy
 - ▶ Ensure requirements are met
- ▶ Collapse cash flow window
 - ▶ Submit claims sooner

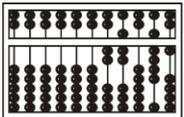


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE PORTAL

Medicaid Processing - Documentation

- ▶ Required documentation
 - ▶ IEP
 - ▶ Parental Consent
 - ▶ Prescriptions / Written Orders / Referrals / Speech Recommendations
 - ▶ Attendance / session record
 - ▶ Time in/out
 - ▶ Location / Setting
 - ▶ Diagnosis Codes / Procedure Codes
 - ▶ Notes
 - ▶ Etc.



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

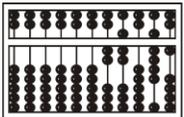
CP
SE **PORTAL**

Prior Vendor Process

- ▶ Every few months check child eligibility
- ▶ Determine which children have potential claimable services
- ▶ Submit requests to providers for documentation months after
- ▶ Providers submit documentation
- ▶ Vendor submits claim to Medicaid

New process

- ▶ Requests for documentation will be made through CPSE Portal
- ▶ Regularly, an email will be sent notifying you to check CPSE Portal for outstanding documentation requests
- ▶ User will run a report that lists what documentation is needed.
 - ▶ Child
 - ▶ District
 - ▶ School Year
 - ▶ Document type (IEP, Prescription, parental Consent, etc.)
- ▶ Only documentation of Medicaid children will be requested....for now.

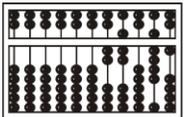


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

How to get documentation to McGuinness

- ▶ Upload through CPSE Portal
- ▶ Fax
- ▶ Send it US Mail

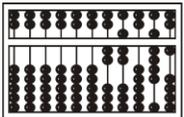


JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Upload documentation through CPSE Portal

- ▶ Get documentation to electronic format (image / PDF)
 - ▶ Scan it
 - ▶ Download IEP from IEP Direct
 - ▶ Etc.
- ▶ Specific screens for Consent, IEP, and Scripts

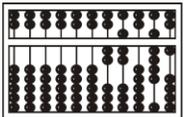


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Documentation Prep

- ▶ Requests for Documentation has option to generate PDF of coversheets
- ▶ Each coversheet is for a single piece of documentation
 - ▶ One child's IEP
 - ▶ One child's Parental consent
- ▶ Cover sheet has
 - ▶ Child information
 - ▶ Documentation type



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

**CP
SE** PORTAL

Coversheet



Documentation Coversheet

2014-2015

IEP

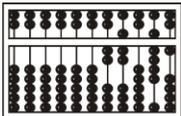
Child First Name	Jon
Child Last Name	Doe
Child DOB	2/2/12
County	Nassau
District	Westbury
Provider	My Demo School for Child Therapy Services
School Year	2014-2015
Document Type	IEP
Comments	
	

Note the barcode

To submit this documentation, print this form and use it as a coversheet for the specified documentation. Multiple documents can be sent together, as long as they are separated by the appropriate coversheet.

- a) Upload directly to CPSE Portal.
Scan documentation and upload the scanned document to CPSE Portal. Refer to CPSE Portal Knowledge Base (<http://support.cpseportal.com>) for additional instructions.
- b) Fax (518) 348-3984
- c) Mail it to

James McGuinness & Associates
Attn: CPSE Portal Medicaid Processing
PO Box
Schenectady, NY 12305

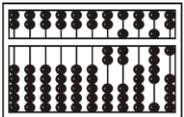


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Documentation Packet

- ▶ Create a packet by placing coversheet on top of corresponding documentation
- ▶ You can bundle packets as long as there are appropriate coversheets separating them
- ▶ You can bundle multiple children's information together, as long as there are appropriate coversheets separating them
- ▶ You can bundle multiple documentation types (IEP, Script, Consent) as long as there are appropriate coversheets separating them
- ▶ The barcoded coversheet is used to route the document to the appropriate child / school year / documentation type/ etc.

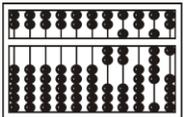


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE **PORTAL**

Submit documentation

- ▶ Option 1 - Scan and upload
 - ▶ Scan documents to file (PDF preferred, but image is OK)
 - ▶ Upload file to CPSE Portal through CPSE Portal Web page
- ▶ Option 2 - Fax
 - ▶ Fax the bundle(s) to the number printed on the barcoded coversheet
- ▶ Option 3 - US Mail
 - ▶ Copy the documentation
 - ▶ Assemble packets of the coversheets with documentation copies
 - ▶ Mail the bundled packets to the address on the barcoded coversheet

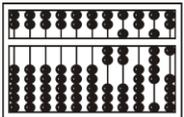


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Upload documents without coversheet

- ▶ You can upload electronic documentation without coversheets
- ▶ Without coversheets, they can't be routed properly, therefore additional information is needed.
- ▶ Script
 - ▶ Lookup child
- ▶ IEP
- ▶ Parental Consent



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

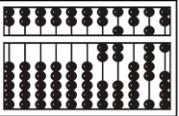
CP
SE **PORTAL**

Upload Parental Consent

The screenshot shows the CPSEExchange web portal. At the top left is the logo with the text "CPSEExchange" and a mouse cursor over it. At the top right, it says "Hello, TrainingUser554". Below the logo is a navigation menu with items: Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, and People. Below the menu, user information is displayed: "RAY, Lean", "County: SCHENECTADY", "District: NISKAYUNA CSD", and "DOB: 4/6/2007", with a "Redo Search" button. The main section is titled "Parental Consents" and contains an "Upload New Parental Consent" button. Below this is a text box containing "No parental consents found." A modal window is open in the foreground, showing a file selection process. It has a "File" field with a "Browse..." button and the text "CB.PDF". Below that, it says "Allowed file types: PDF (.pdf), or images (.tif, .png, .jpg, .gif)". There is a "Date Signed" field with the value "06/01/2015" and a "Save" button at the bottom.

Upload Written Order / Script

The screenshot shows the CPSEExchange web application interface. At the top, the logo 'CPSEExchange' is on the left, and a user greeting 'Hello, TrainingUser554 . You are currently logged in for N:' is on the right. A navigation menu includes 'Home', 'File Transfer', 'Attendance', 'Billing', 'Lookup', 'Reports', 'Medicaid', 'People', 'My Account', and 'Knowled'. The main content area is titled 'Create Order for Child' and displays information for 'RAY, Lean' in 'SCHENECTADY' county, 'NISKAYUNA CSD' district, with a 'DOB: 4/6/2007'. A 'Redo Search' button is present. Below this, a section 'Images of Written Orders' has an 'Upload New Image of Written Order' button. A message box states 'No written orders found for this child.' An open modal window titled 'Upload New Image of Written Order' contains the following fields: 'File' with a 'Browse...' button and 'RS.PDF' text; 'Allowed file types: PDF (.pdf) or images (.tif, .png, .jpg, .gif)'; 'Description' with 'Scripts Dr. Phil' and a 'Full Description' of ': OTPT - Scripts Dr. Phil'; 'NPI of Ordering Provider' with '1205122512' and a dropdown for 'MRS. LEELAMMA SAMUEL, M.D.'; 'Date Signed' with '07/14/14'; 'Covers Services During' with '2014 - 2015'; and 'Covers Services' with checkboxes for 'Occupational Therapy' (checked), 'Physical Therapy' (checked), 'Speech Therapy', and 'Other Services'. An 'Upload' button is at the bottom of the modal.



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE PORTAL

Upload IEP

- ▶ IEP Direct can generate a PDF of the IEP
- ▶ Just need to lookup the child's name and indicate school year
- ▶ Then browse and upload the file
- ▶ That saves lots of effort and paper from scanning, printing, copying, faxing, etc.

IEP Upload

IEP Information

School Year

Session Type

School Year

Effective Date

Lookup Child (Last Name)

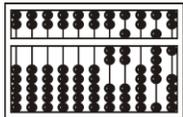
	Child	DOB	County
Select	doe, jon	3/9/2006	NASSAU

Child Selected

File Type

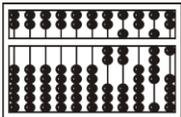
File RXC28ID47943.pdf

Description



Documentation Summary

- ▶ Needed documentation will be reported via CPSE Portal
- ▶ Multiple ways to submit documentation (Scan/upload, Upload, fax, US Mail)
- ▶ In the future, it may be easier for providers to submit documentation for ALL children (not just Medicaid) as it comes in, rather than retrieving later for submission. That is OK

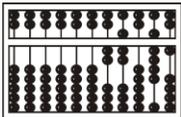


JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Treatment Logs?

- ▶ Two processes
 - ▶ Process #1 - For Service dates 1/1/15 thru either 6/30/15 or 8/31/15
 - ▶ Just like IEP, Consent, RX, etc.
 - ▶ There will be a request
 - ▶ Print coversheet and fax/upload/mail
 - ▶ Process #2 - For Service dates beginning either 7/1/15 or 9/1/15
 - ▶ Data will be put directly into CPSE Portal

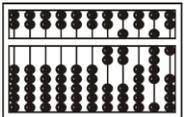


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE PORTAL

What is CPSE Portal

- ▶ A website <https://www.CPSEPortal.com>
- ▶ Linked to County Preschool data management system
- ▶ Provides for collecting attendance and billing information
- ▶ Provides electronic billing services

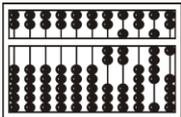


JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

How does data get into CPSE Portal

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



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

**CP
SE** PORTAL

When will we start using CPSE Portal

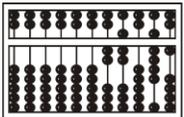
- ▶ Independent providers
 - ▶ Data enter for service dates beginning 7/1/15
- ▶ Agencies that use EnterCLAIMS
 - ▶ Continue as normal. In August, upload July service dates into CPSE Portal
- ▶ Agencies that use CLAIMS (and not EnterCLAIMS)
 - ▶ Continue as normal. Decide whether to start with July service dates or September.
- ▶ Agencies that use other software systems
 - ▶ Upload data for service dates starting 9/1/15
- ▶ Agencies that don't use any current software system
 - ▶ Decide to start data entry process on 7/1/15 (recommended) or 9/1/15

Process overview

- ▶ County uploads list of enrollments for provider
- ▶ Provider enters attendance information against the uploaded enrollments
- ▶ Service provider provides a digital signature to the attendance
- ▶ Billing Provider bundles signed attendance entries into an electronic voucher
- ▶ Billing Provider digitally signs and submits electronic voucher to County
- ▶ Billing Provider prints voucher summary sheets from CPSE Portal
- ▶ Paper Voucher summary sheets are signed in pen and delivered to County (US mail, drop off, etc.)
- ▶ County staff pulls up electronic voucher corresponding to paper summary
- ▶ Preschool software audits electronic voucher against enrollments (frequency, # of sessions remaining, etc.)
- ▶ County user processes and posts voucher to Preschool system

County Preschool is master data source

- ▶ The demographic and enrollment data comes from what is entered in the Preschool software system
- ▶ Counties upload data regularly
- ▶ Data includes
 - ▶ Providers/Programs/Rates
 - ▶ Child information
 - ▶ Enrollments
 - ▶ Provider
 - ▶ Service
 - ▶ Frequency



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

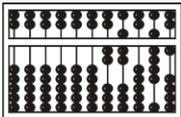
**CP
SE** PORTAL

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

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

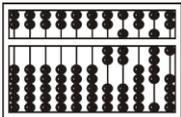


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Billing Provider attestation

- ▶ Each Billing Provider will choose a PIN. This PIN is used in conjunction with their login to create a digital signature that is primarily used for submitting a bill to the County.
- ▶ Each Billing Provider will have an authorized representative complete an attestation indicating that
 - ▶ They understand that entering their PIN equates to creating a digital signature
 - ▶ The digital signature carries the same authority as signing in pen on paper
 - ▶ They will keep their login credentials (username and password) as well as their PIN secret and will not share it with anybody
- ▶ The attestation is completed on paper and signed in ink
- ▶ Billing Providers will not be able to digitally sign and submit electronic vouchers until the attestation has been received and recorded

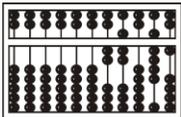


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE **PORTAL**

Service/Rendering Provider attestation

- ▶ Each Service Provider will choose a PIN. This PIN is used in conjunction with their login to create a digital signature that is used for sign attendance
- ▶ Each Service Provider will complete an attestation for each Billing Provider they provide services for, indicating that
 - ▶ They understand that entering their PIN equates to creating a digital signature
 - ▶ They will review all data they have entered PRIOR to signing. They are responsible for signing inaccurately entered information.
 - ▶ The digital signature carries the same authority as signing in pen on paper
 - ▶ They will keep their login credentials (username and password) as well as their PIN secret and will not share it with anybody
- ▶ The attestation is completed on paper and signed in ink
- ▶ Service Providers will not be able to digitally sign attendance until the attestation has been received and recorded



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE **PORTAL**

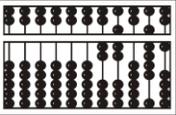
Rendering Provider Attestations

[Home](#) | [File Transfer](#) | [Attendance](#) | [Billing](#) | [Lookup](#) | [Reports](#) | [Medicaid](#) | [People](#) | [My Account](#) | [Knowledge Base](#)

Rendering Provider Attestations
 County: **SCHENECTADY** | Rendering Provider Name: | School Year: **2014 - 2015** | [Retrieve](#)

Last Name	First Name	County	School Year	Attestation Received	Recorded By	Recorded Date/Time
ADONRI	Cordelle	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
AFONSO	Yaurdin	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
ALFARO	Oluwafolakemi Adebosipo	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
AMALFITANO	Mechel	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
ARISTILDE	Mayana	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
AUER	Lydia Nicole	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
BARKET	Leisha	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
BARKOFF	Ean	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
BENCAL	Cheikhouna	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
BHASIN	Daniel David	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
BODNER	Wakuv	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
BOTTJER	Eudasia	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
BOWEN	Rachel Hope	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
BUCKLEY	William James	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
CARLAW	Miarie	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
CARPENTER	Aimee	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
CEVALLOS	Jaiveon	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
CHOATE	Senguun	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		
CICALESE	Lynnae	SCHENECTADY	2014 - 2015	<input checked="" type="checkbox"/>	admin	05/06/2015 11:09 AM
CLAROS	Hickson	SCHENECTADY	2014 - 2015	<input type="checkbox"/>		

[Excel](#)



Creating Service Provider Accounts

The screenshot displays the CPSExchange web application interface. At the top, the logo 'CPSExchange' is on the left, and the user is logged in as 'ACHIEVEMENTS'. A navigation menu includes Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The main content area is titled 'Manage Invitations' and shows 'No invitations found.' An 'Invite Someone' modal form is open, containing the following fields:

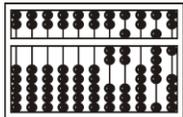
- Provider: ACHIEVEMENTS
- First Name: Shari
- Last Name: Trudell
- Email: sharitrudell@gmail.com
- Confirm Email: sharitrudell@gmail.com
- User Type: Service Provider
- NPI: 1164677720
- Profession: SLP - Speech & Language Pathologist (058)
- NYS License Number: 123456
- Supervisor

A 'Send Invite' button is located at the bottom right of the modal. The footer of the page reads '© James McGuinness & Associates'.

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							

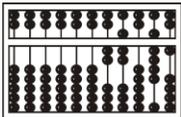


Creating Service Provider Accounts



The screenshot shows a web portal with a navigation menu at the top containing: Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The 'People' menu is expanded, showing sub-options: Provider Specific Identifiers, Service Providers, Users, and Invitations. The main content area is titled 'Manage Invitations' and includes a 'User Type' dropdown set to '(All)', a 'Show Only Pending' checkbox, and a 'Search' button. Below this, a message states 'No invitations found.' At the bottom of the main area, there are two buttons: 'Invite Someone' and 'Import Invitation Batch File'. A red arrow points from the text 'Use this link to go to the upload file screen' to the 'Import Invitation Batch File' button. A copyright notice '© James McGuinness & Associates' is located at the bottom center of the page.

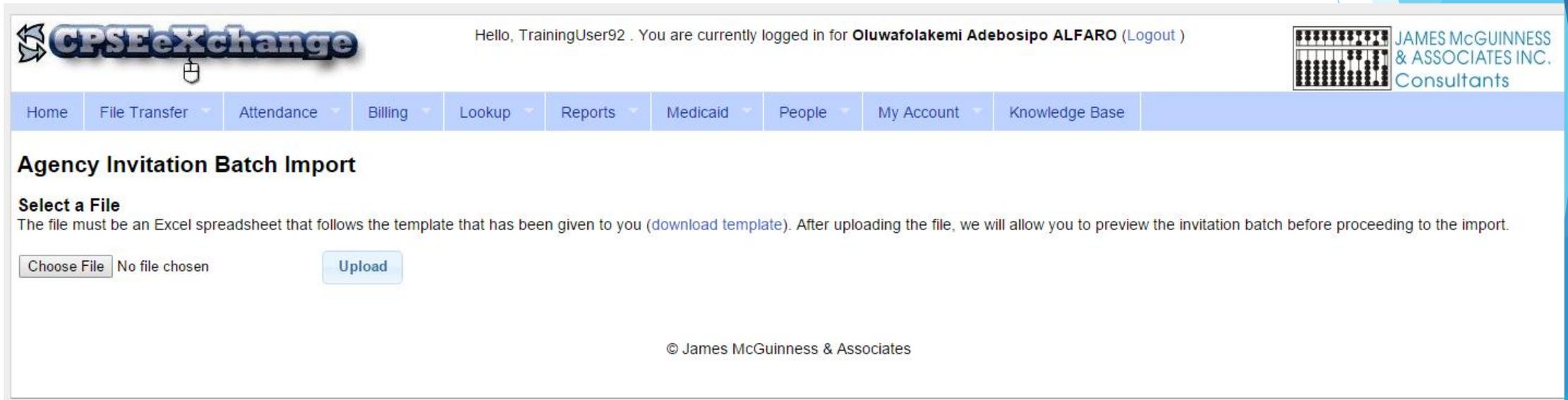
Use this link to go to the upload file screen



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

C P
S E PORTAL

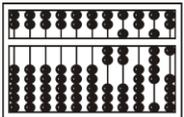
Creating Service Provider Accounts



The screenshot shows the CPSEExchange web portal. At the top left is the CPSEExchange logo. To its right, a user greeting reads: "Hello, TrainingUser92 . You are currently logged in for **Oluwafolakemi Adebosipo ALFARO** (Logout)". On the top right is the logo for JAMES McGUINNESS & ASSOCIATES INC. Consultants. Below the header is a navigation menu with the following items: Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, 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 the instruction: "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 this text is a file selection interface with a "Choose File" button, the text "No file chosen", and an "Upload" button. At the bottom center of the page, there is a copyright notice: "© James McGuinness & Associates".

Service Provider accounts for agency

- ▶ Service Provider (teachers, therapists, etc.) will receive an email inviting them to associate with the agency
- ▶ Users that already have an account (from a prior agency/ as an independent, etc.) can associate their existing account to the agency
- ▶ New users will be able to choose username and password
- ▶ They will be asked to enter some basic information including
 - ▶ License information
 - ▶ Credentials to be used with digital signature



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

 **PORTAL**

The logo for CPSE features the letters C, P, S, and E in a 2x2 grid. C is green, P is blue, S is yellow, and E is red.

Creating Service Provider Accounts

Shari Trudell,

You have been invited to be associated with the agency ACHIEVEMENTS in the CPSEPortal system. Please follow the link below to confirm this invitation, and associate yourself with this agency.

<http://localhost/CPSEPortal/People/Invites/AgencyInvitationResponse.ashx?code=b72b420682ac4ad89c62f90d42f7820b>

(Login)

[Home](#) | [Knowledge Base](#)

CPSEPortal Invitation

You have been invited to be associated with **ACHIEVEMENTS** as a service provider 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.

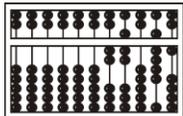
Name Confirmation - Confirm this information is correct.
First Name Last Name
Shari Trudell

Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.
NPI **1164677720**
Profession **SLP - Speech & Language Pathologist (058)**
NYS License Number **123456**

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

You appear to already be registered with CPSEPortal
 By accepting this invitation, you are agreeing to associate yourself with this additional billing provider agency.

© James McGuinness & Associates



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE
PORTAL

Creating Service Provider Accounts

 (Login) 

Home Knowledge Base

CPSEPortal Invitation

You have been invited to be associated with **ACHIEVEMENTS** as a service provider 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
Shari Trudell

Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.

NPI 1164677720
Profession SLP - Speech & Language Pathologist (058)
NYS License Number 123456
Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP)

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

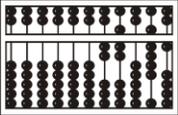
Password Confirm Password

© James McGuinness & Associates

Provider Specific Identifiers

The screenshot shows a web browser window with the URL <https://training.cpseportal.com/Maintenance/ProviderSpecificIdentifier.aspx>. The page header includes the CPSE PORTAL logo, a user greeting for TrainingUser68, and the company name JAMES McGUINNESS & ASSOCIATES INC. Consultants. A navigation menu is visible with options like Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The 'People' menu is expanded, showing 'Provider Specific Identifiers', 'Service Providers', 'Users', and 'Invitations'. The main content area displays a table of Provider Specific Identifiers with columns for Name, NPI, and Provider Specific Identifier, along with an 'Edit' link for each row.

Name	NPI	Provider Specific Identifier	
ADONRI, Cordelle	1326290289	9714	Edit
AFONSO, Yaurdin	1760744767	9676	Edit
ALFARO, Oluwafolakemi Adebosipo	1497907604		Edit
AMALFITANO, Mechet	1285888578	9702	Edit
ARISTILDE, Mayana		9980	Edit
AUER, Lydia Nicole		9908	Edit
BARKET, Leisha	1578813101	9749	Edit
BARKOFF, Ean	1790038800	9942	Edit
BENCAL, Cheikhouna		9949	Edit
BHASIN, Daniel David	1972859411	9743	Edit
BODNER, Wakuv	1477799856	9725	Edit
BOTTJER, Eudasia	1609012970	9855	Edit
BOWEN, Rachel Hope		9785	Edit
BUCKLEY, William James		9984	Edit
CARLAW, Marie	1598918476	9713	Edit
CARPENTER, Aimee	1528317377	9918	Edit
CEVALLOS, Jaiveon		9952	Edit
CHOATE, Senguun	1265795314	9783	Edit
CICALESE, Lynnae	1730432782	9761	Edit
CLAROS, Hickson	1033469762	9739	Edit
CLAY, Coryannah	1992054381	9950	Edit
COSTA, Matthew	1699021253	9794	Edit
CRESPINERAZO, Aishnee	1912159096	9684	Edit
DACHS, Jadzia	1689960379		Edit
DAYSCHOTT, AVAN	1851605729	9706	Edit
DELAO, DEMETRA	1689925661	9834	Edit
DELLAMORTE, Kalob	1538410899	9696	Edit
DEMICOLI, Juanhael	1346591641		Edit



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants



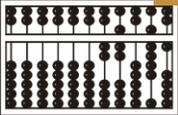
Enrollment Listing

The screenshot shows the CPSE PORTAL interface. At the top left is the CPSE PORTAL logo. To its right, a user greeting reads: "Hello, TrainingUser68 . You are currently logged in for TrainingProvider138 (Logout)". On the top right is the logo for JAMES McGUINNESS & ASSOCIATES INC. Consultants. Below the header is a navigation menu with items: Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The main content area is titled "Select Report Criteria" and contains several form fields: checkboxes for "CB", "CBRS", "RS", and "SEIT"; "From Date" (9/1/2014) and "To Date" (6/30/2015) input fields; a "Sort Report" section with a "Sort By:" dropdown menu (set to "ElectronicServiceID") and a "Descending?" checkbox; and an "Add Another Sort" link. At the bottom of the form are two buttons: "Run Excel Report" and "Create CSV". A copyright notice "© James McGuinness & Associates" is centered at the bottom of the page.

Enrollment Listing

Enrollment_Listing - Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
	LastName	FirstName	DOB	Gender	FromDate	ToDate	ServiceType	District	Provider	ProgramCode	StacCode	Frequency	IndividualOrGroup	1:1 Aide	ESID					
1	MENDOZACOSTA	Jellynn	10/9/2010	F	9/3/2014	12/12/2014	CBSR - OT	GUILDERLAND CSD	TrainingProvider138	9160	K	2x30	Individual		CBSR1415W0001096					
2	MENDOZACOSTA	Jellynn	10/9/2010	F	9/3/2014	12/12/2014	CBSR - PT	GUILDERLAND CSD	TrainingProvider138	9160	K	3x30	Individual		CBSR1415W0001097					
3	MENDOZACOSTA	Jellynn	10/9/2010	F	9/3/2014	12/12/2014	CBSR - ST	GUILDERLAND CSD	TrainingProvider138	9160	K	2x30	Individual		CBSR1415W0001098					
4	MENDOZACOSTA	Jellynn	10/9/2010	F	9/3/2014	12/12/2014	CBSR - ST	GUILDERLAND CSD	TrainingProvider138	9160	K	2x30	Group		CBSR1415W0001099					
5	MENDOZACOSTA	Jellynn	10/9/2010	F	9/3/2014	12/12/2014	CBSR - ST	GUILDERLAND CSD	TrainingProvider138	9160	K	2x30	Individual		CBSR1415W0001100					
6	AMONORTEGA	Joleigh	12/23/2010	M	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9100	K	4x30	Individual		CBSR1415W0001101					
7	AMONORTEGA	Joleigh	12/23/2010	M	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9100	K	1x30	Group		CBSR1415W0001102					
8	AMONORTEGA	Joleigh	12/23/2010	M	9/3/2014	6/19/2015	CBSR - MUS	ALBANY CITY SD	TrainingProvider138	9100	K	1x30	Individual		CBSR1415W0001103					
9	AMONORTEGA	Joleigh	12/23/2010	M	9/3/2014	6/19/2015	CBSR - MUS	ALBANY CITY SD	TrainingProvider138	9100	K	1x30	Group		CBSR1415W0001104					
10	ALMAN	Adley	3/8/2010	M	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	3x30	Individual		CBSR1415W0001105					
11	ALMAN	Adley	3/8/2010	M	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	1x30	Group		CBSR1415W0001106					
12	ALMAN	Adley	3/8/2010	M	9/3/2014	6/19/2015	CBSR - MUS	ALBANY CITY SD	TrainingProvider138	9160	K	1x30	Individual		CBSR1415W0001107					
13	ALMAN	Adley	3/8/2010	M	9/3/2014	6/19/2015	CBSR - MUS	ALBANY CITY SD	TrainingProvider138	9160	K	1x30	Group		CBSR1415W0001108					
14	ALMAN	Adley	1/4/2010	M	9/3/2014	12/1/2014	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	2x30	Individual		CBSR1415W0001109					
15	ALMAN	Adley	1/4/2010	M	9/3/2014	12/1/2014	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	1x30	Group		CBSR1415W0001110					
16	MEDINAESPINOZA	Gregary	3/3/2011	M	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9100	K	4x30	Individual		CBSR1415W0001111					
17	MEDINAESPINOZA	Gregary	3/3/2011	M	9/3/2014	6/19/2015	CBSR - OT	ALBANY CITY SD	TrainingProvider138	9100	K	2x30	Individual		CBSR1415W0001112					
18	LANGER	Amy Jesus	6/4/2010	M	9/3/2014	6/19/2015	CBSR - ST	SOUTH COLONIE CSD	TrainingProvider138	9160	K	2x30	Individual		CBSR1415W0001120					
19	LANGER	Amy Jesus	6/4/2010	M	9/3/2014	6/19/2015	CBSR - OT	SOUTH COLONIE CSD	TrainingProvider138	9160	K	1x30	Group		CBSR1415W0001121					
20	LANGER	Amy Jesus	6/4/2010	M	9/3/2014	6/19/2015	CBSR - OT	SOUTH COLONIE CSD	TrainingProvider138	9160	K	1x30	Individual		CBSR1415W0001122					
21	LANGER	Amy Jesus	6/4/2010	M	9/3/2014	6/19/2015	CBSR - ST	SOUTH COLONIE CSD	TrainingProvider138	9160	K	1x30	Group		CBSR1415W0001124					
22	HUNTER	Maritzel	12/27/2010	M	9/3/2014	2/13/2015	CBSR - OT	ALBANY CITY SD	TrainingProvider138	9160	K	1x30	Group		CBSR1415W0001165					
23	HUNTER	Maritzel	12/27/2010	M	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	2x30	Group		CBSR1415W0001166					
24	HUNTER	Maritzel	12/27/2010	M	9/3/2014	2/13/2015	CBSR - PLA	ALBANY CITY SD	TrainingProvider138	9160	K	3x30	Individual		CBSR1415W0001167					
25	DRAYTON	Yaslene	4/19/2011	F	9/3/2014	6/19/2015	CBSR - PT	ALBANY CITY SD	TrainingProvider138	9160	K	2x30	Individual		CBSR1415W0001168					
26	DRAYTON	Yaslene	4/19/2011	F	9/3/2014	6/19/2015	CBSR - OT	ALBANY CITY SD	TrainingProvider138	9160	K	2x30	Individual		CBSR1415W0001169					
27	DRAYTON	Yaslene	4/19/2011	F	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	2x30	Individual		CBSR1415W0001170					
28	URRUTIA	Azriella	2/13/2010	F	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	3x30	Individual		CBSR1415W0001171					
29	PERDOMO	Ankit	2/20/2010	F	9/3/2014	6/19/2015	CBSR - ST	WATERVLIET CITY SD	TrainingProvider138	9160	K	3x30	Individual		CBSR1415W0001172					
30	KOGAN	Ashantewa	5/7/2010	F	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	1x30	Individual		CBSR1415W0001222					
31	KOGAN	Ashantewa	5/7/2010	F	9/3/2014	6/19/2015	CBSR - PT	ALBANY CITY SD	TrainingProvider138	9160	K	2x30	Individual		CBSR1415W0001223					
32	KOGAN	Ashantewa	5/7/2010	F	9/3/2014	6/19/2015	CBSR - OT	ALBANY CITY SD	TrainingProvider138	9160	K	1x30 Monthly	Group		CBSR1415W0001224					
33	NYAHAY	Mikiala	4/21/2010	F	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	3x30	Individual		CBSR1415W0001293					
34	NYAHAY	Mikiala	4/21/2010	F	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	1x30	Group		CBSR1415W0001294					
35	THOMASON	Hulston	11/19/2010	F	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	3x30	Individual		CBSR1415W0001295					
36	THOMASON	Hulston	11/19/2010	F	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9160	K	1x30	Group		CBSR1415W0001296					
37	DANTONA	Vincent Micheal	9/30/2011	F	9/3/2014	6/19/2015	CBSR - ST	ALBANY CITY SD	TrainingProvider138	9100	K	4x30	Individual		CBSR1415W0001301					
38	DANTONA	Vincent Micheal	9/30/2011	F	9/3/2014	6/19/2015	CBSR - OT	ALBANY CITY SD	TrainingProvider138	9100	K	2x30	Individual		CBSR1415W0001302					
39	DANTONA	Vincent Micheal	9/30/2011	F	9/3/2014	6/19/2015	CBSR - MUS	ALBANY CITY SD	TrainingProvider138	9100	K	1x30	Individual		CBSR1415W0001303					

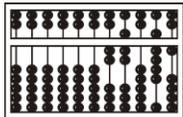


**JAMES MCGUINNESS
& ASSOCIATES INC.**
Consultants

**CP
SE** PORTAL

Assigning caseload (agencies only)

- ▶ Agency users will assign which service providers can enter attendance against which enrollments / children



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE **PORTAL**

Assign Children To Therapists

CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for TrainingProvider138 (Logout)

JAMES McGUINNESS & ASSOCIATES INC. Consultants

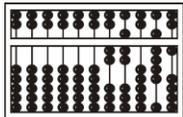
Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Select a Child

Last Name Search [Show Advanced Search options]

	Last Name	First Name	DOB	SED STAC ID	District	County
Select	ALLOCA	Trysten	10/17/2009	E44333	ALBANY CITY SD	Albany
Select	ALLOCCA	Isaberta	1/27/2007	D54522	ALBANY CITY SD	Albany

© James McGuinness & Associates



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

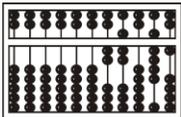


Assign Children To Therapists

The screenshot shows a web browser window with the URL https://training.cpseportal.com/Attendance/Assign_Child_Therapists_and_Service_Providers.aspx. The page header includes the CPSE PORTAL logo, a user greeting for TrainingUser68, and the company name JAMES McGUINNESS & ASSOCIATES INC. Consultants. A navigation menu contains links for Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The main content area is titled 'Select a Child' and displays the child's name ALLOCCA, Isabela, along with County: Albany, District: ALBANY CITY SD, and DOB: 1/27/2007. Below this is a 'Redo Search' button. The 'Select an Enrollment' section contains a table with the following data:

	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

© James McGuinness & Associates



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants



Assign Children To Therapists

Select a Child
ALLOCCA, Isabela County: Albany District: ALBANY CITY SD DOB: 1/27/2007 [Redo Search](#)

Select an Enrollment

Select	Service ID	Enrollment Type	Service Type	Frequency	From Date	To Date	I/G	Assigned Therapist/Service Provider
Select	RS1112W0014469	RS	PT	2x30	3/19/2012	6/22/2012	I	
Select	RS1112W0014485	RS	ST	5x30	3/1/2012	6/22/2012	I	
Select	SE1112W0002798	SEIT		20x30	3/19/2012	6/22/2012		
Select	SE1112W0002782	SEIT		10x30	1/23/2012	3/16/2012		
Select	RS1112W0014484	RS	ST	5x30	1/23/2012	2/29/2012	I	

Assigned Therapists

Last Name	First Name	NPI
<input type="checkbox"/>	ADONRI Cordelle	1326290289
<input type="checkbox"/>	ALFARO Oluwafolakemi Adebosipo	1497907604

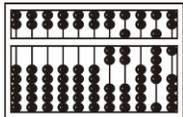
[Remove Therapist](#)

Available Therapists

Last Name	First Name	NPI
<input checked="" type="checkbox"/>	AFONSO Yaurdin	176074476
<input type="checkbox"/>	AMALFITANO Mechel	128588857
<input type="checkbox"/>	ARISTILDE Mayana	
<input type="checkbox"/>	AUER Lydia Nicole	
<input type="checkbox"/>	BARKET Leisha	157881310
<input type="checkbox"/>	BARKOFF Ean	179003880
<input type="checkbox"/>	BENCAL Cheikhouna	
<input type="checkbox"/>	BHASIN Daniel David	197285941
<input type="checkbox"/>	BODNER Wakuv	147779985
<input type="checkbox"/>	BOTTJER Eudasia	160901297
<input type="checkbox"/>	BOWEN Rachel Hope	
<input type="checkbox"/>	BUCKLEY William	

[Add Therapist\(s\)/Service Provider\(s\)](#)

© James McGuinness & Associates



Classroom Management

CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for TrainingProvider138 (Logout)

JAMES McGUINNESS & ASSOCIATES INC. Consultants

Home | File Transfer | Attendance | Billing | Lookup | Reports | Medicaid | People | My Account | Knowledge Base

[- Collapse Filter]

Filter Classrooms

Session: 2014 - 2015 Winter Program: Active During (Select Month & Year):

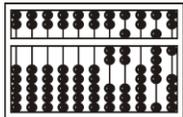
Apply Filter

	Class	Description	School Year	Program	# Students	# Teachers	# Aides		
Attendance	Arbor Hill (SY14-15) (0:0:0)	5Hr Program - Robin	2014 - 2015 Winter	9160	7	1	0	Edit Classroom	Assign Children
Attendance	Child's Place (SY14-15) (0:0:0)	5Hr Program - Jaime	2014 - 2015 Winter	9160	2	1	0	Edit Classroom	Assign Children
Attendance	Child's Place(CB)(SY14-15 (0:0:0)	Centerbased 5Hr Program	2014 - 2015 Winter	9100	11	1	0	Edit Classroom	Assign Children
Attendance	Ohav-A (SY14-15) (0:0:0)	5Hr Program - Heather	2014 - 2015 Winter	9160	6	1	0	Edit Classroom	Assign Children
Attendance	Ohav-B (SY14-15) (0:0:0)	5Hr Program - Stella	2014 - 2015 Winter	9160	5	1	0	Edit Classroom	Assign Children
Attendance	Schenectady Day(SY 14-15) (0:0:0)	5.0Hr Program-Lisa	2014 - 2015 Winter	9160	6	1	0	Edit Classroom	Assign Children
Attendance	St.Anthony's(SY 14-15) (0:0:0)	5.0Hr Program-Melissa	2014 - 2015 Winter	9160	7	1	0	Edit Classroom	Assign Children
Attendance	St.Anthony's2.5(SY14-15) (0:0:0)	2.5Hr Program-Katy	2014 - 2015 Winter	9165	11	1	0	Edit Classroom	Assign Children
Attendance	UKids (SY14-15) (0:0:0)	5Hr Program - Carrie	2014 - 2015 Winter	9160	6	1	0	Edit Classroom	Assign Children
Attendance	Van Rensselaer DHH (14-15 (0:0:0)	5Hr Program - Rachel	2014 - 2015 Winter	9160	5	1	0	Edit Classroom	Assign Children

Create New Classroom

© James McGuinness & Associates

AttendanceImport.xlsd Show all downloads...



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Classroom Management (Create Classroom)

CPSE PORTAL

Hello, TrainingUser68 . You are currently logged in for TrainingProvider138 (Logout)

JAMES McGUINNESS & ASSOCIATES INC. Consultants

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Classroom Information

School Year: 2015 - 2016 Winter Program: -- select --

Name:

Description:

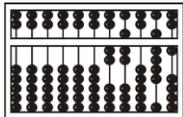
Students: # Teachers: # Aides:

[- Hide Assignments]

Only Include in Unassigned List if Discipline Code is TEACH or AIDE? (will reload lists)

Select	LastName	FirstName	Role
<input type="checkbox"/>	ADONRI	Cordelle	Teacher
<input type="checkbox"/>	AFONSO	Yaurdin	Teacher
<input type="checkbox"/>	ALFARO	Oluwafolakemi Adebosipo	Teacher
<input type="checkbox"/>	AMALFITANO	Mechel	Teacher
<input type="checkbox"/>	ARISTILDE	Mayana	Teacher
<input type="checkbox"/>	AUER	Lydia Nicole	Teacher
<input type="checkbox"/>	BARKET	Leisha	Teacher
<input type="checkbox"/>	BARKNEE	E...	Teacher

Select All Select All



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Classroom Management (Assign Children)

Attendance - CPSE x www.oms.nysed.gov x Product Backlog x Portal - CPSEPorta x Migrating To Auto x Login Successful x Assign Children to x Tove Lo - Habil x David

https://training.cpseportal.com/Attendance/Assign_Children_Classroom.aspx?ClassroomID=490

CPSE PORTAL Hello, TrainingUser68 . You are currently logged in for **TrainingProvider138** (Logout)

JAMES McGUINNESS & ASSOCIATES INC. Consultants

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Classroom: Test

Assigned to Classroom
No children currently assigned to classroom.

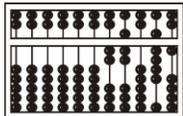
Not Assigned [+ Filter Unassigned Children]

Select	Last Name	First Name	District	County	DOB	
<input type="checkbox"/>	ABBOTT	John aka Jack	ALBANY CITY SD	Albany	3/18/2011	De
<input type="checkbox"/>	AMONORTEGA	Joleigh	ALBANY CITY SD	Albany	12/23/2010	De
<input type="checkbox"/>	HERNANDEZFUENTES	Tamiera	ALBANY CITY SD	Albany	11/13/2012	De
<input type="checkbox"/>	ROZENBLAT	Leury	ALBANY CITY SD	Albany	4/12/2012	De
<input type="checkbox"/>	SEPELAK	Yeisan	MENANDS UFSD	Albany	4/6/2011	De

Select All Unassign -> <- Assign Select All

Save Changes

© James McGuinness & Associates



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants



Credentials/Signature


CPSE PORTAL
Hello, TrainingUser92 . You are currently logged in for Oluwafolakemi Adebosipo ALFARO (Logout)


[Home](#)
[File Transfer](#)
[Attendance](#)
[Billing](#)
[Lookup](#)
[Reports](#)
[Medicaid](#)
[People](#)
[My Account](#)
[Knowledge Base](#)

My Profile

[Personal and Professional](#)
[User Information](#)
[Favorites](#)
[PIN](#)

Information in CPSE Database

Last Name:
 First Name:
 NPI:
 Signature, Title, and Credentials:
 (e.g.: Mary Brown, CCC-SLP)

[Update](#)
[Add](#)

Licenses / Certifications / Professions

	Description	Credential Type	#	State	NY Profession Code	From	To	Ac
PT	Physical Therapist	License	006260		062			

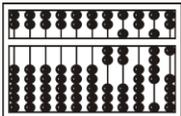
Information from NPPES NPI Registry

Click here for NPPES website: This NPI is for an

First Name: Organization Name:
 Last Name: Mailing Address 1:
 Credentials: Mailing Address 2:
 City: State: Zip:

Primary	Taxonomy	Type	Classification	Specialization	State	L
Y	172M00000X	Other Service Providers	Mechanotherapy		NY	006260-1

© James McGuinness & Associates



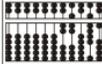
JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Favorites

← → ↻ 🏠 https://training.cpseportal.com/My_Account/TherapistProfile.aspx 🔍 ☆ ☰

 Hello, TrainingUser92 . You are currently logged in for **Oluwafolakemi Adebosipo ALFARO** (Logout)

 **JAMES MCGUINNESS & ASSOCIATES INC.**
Consultants

Home | File Transfer | Attendance | Billing | Lookup | Reports | Medicaid | People | My Account | Knowledge Base

My Profile

Personal and Professional | User Information | **Favorites** | PIN

Favorite ICD Codes
No favorite ICD codes found.

Favorite CPT Codes
No favorite CPT codes found.

Devel. Delay, Unspecified

© James McGuinness & Associates

Create PIN

The screenshot shows a web browser window with the URL https://training.cpseportal.com/My_Account/TherapistProfile.aspx. The page header includes the CPSE PORTAL logo, a user greeting for "TrainingUser92" logged in as "Oluwafolakemi Adebosipo ALFARO", and the logo for "JAMES McGUINNESS & ASSOCIATES INC. Consultants". A navigation menu contains links for Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base.

The main content area is titled "My Profile" and features a tabbed interface with "Personal and Professional", "User Information", "Favorites", and "PIN". The "PIN" tab is active, displaying a message: "You have not yet created a PIN. You will be unable to digitally sign attendance until you do so. Please create one now." Below this message is a "PIN Number" field with a masked input (dots) and a "Create PIN" button.

A "Password Verification" dialog box is overlaid on the page, containing the text: "For additional security, please re-enter your login password." It includes a "Password" input field and a "Proceed" button.

Licenses and Certifications


Hello, TrainingUser92 . You are currently logged in for **Oluwafolakemi Adebosipo ALFARO** (Logout)


[Home](#) | [File Transfer](#) | [Attendance](#) | [Billing](#) | [Lookup](#) | [Reports](#) | [Medicaid](#) | [People](#) | [My Account](#) | [Knowledge Base](#)

My Profile

[Personal and Professional](#) | [User Information](#) | [Favorites](#) | [PIN](#)

Information in CPSE Database

Last Name:
 First Name:
 NPI:
 Signature, Title, and Credentials:
 (e.g.: Mary Brown, CCC-SLP)

Licenses / Certifications / Professions

	Description	Credential Type	#	State	NY Profession Code	From	To	Active	
PT	Physical Therapist	License	006260		062			<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>

Information from NPPES NPI Registry

Click here for NPPES website: This NPI is for an

First Name:
 Last Name:
 Credentials:

Organization Name:
 Mailing Address 1:
 Mailing Address 2:
 City: State: Zip:

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	172M00000X	Other Service Providers	Mechanotherapist		NY	006260-1

© James McGuinness & Associates

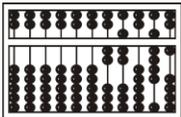
My Caseload

My Caseload

2014 - 2015 Winter ▼

Search

ESID	Last Name	First Name	County	Provider	District	Enrollment Type	RS Type	From Date	To Date	Frequency	Individual Or Group	
RS1415W0010987	ATKINS	Sakina	SCHENECTADY	TrainingProvider100	ROTTERDAM-MOHONASEN CSD	RS	ST	2/2/2015	6/25/2015	1x30	I	Attendances
RS1415W0011238	BANK	Shays	SCHENECTADY	TrainingProvider100	SCHALMONT CSD	RS	ST	6/15/2015	6/25/2015	2x30	I	Attendances
RS1415W0010516	BIANCHINI	Nirob	SCHENECTADY	TrainingProvider100	ROTTERDAM-MOHONASEN CSD	RS	ST	9/3/2014	6/25/2015	2x30	I	Attendances
RS1415W0017483	MANNIX	Klay	Albany	TrainingProvider100	GUILDERLAND CSD	RS	ST	9/2/2014	6/19/2015	2x30	I	Attendances
RS1415W0017279	NYAHAY	Mikiala	Albany	TrainingProvider100	GUILDERLAND CSD	RS	ST	9/2/2014	6/19/2015	2x30	I	Attendances
RS1415W0017284	NYAHAY	Mikiala	Albany	TrainingProvider100	GUILDERLAND CSD	RS	COR	9/2/2014	6/19/2015	1x30 MONTHLY	I	Attendances
RS1415W0010461	SACCONI	Mahlania	SCHENECTADY	TrainingProvider100	ROTTERDAM-MOHONASEN CSD	RS	ST	9/3/2014	6/25/2015	2x30	I	Attendances



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE PORTAL

Attendance Entry

- ▶ Time In / Time Out
- ▶ Setting (Daycare, home, Preschool)
- ▶ Co-visit with Supervisor
- ▶ Diagnosis
- ▶ CPT Codes
- ▶ Make Up (and date being Made Up)
- ▶ Session Notes

New Session for Apr 7, 2015

Time In: 11:30 AM Time Out: 12:00 PM

1 x minute session(s) Setting: Not Selected

Co-Visit with Supervisor

[Child 1]

Child: Not Selected

Primary Diagnosis Code: Not Selected

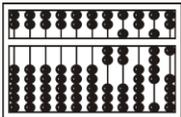
[Set ICD Code as Default For This Enrollment]

CPT Codes: Lookup	Units:
<input type="text"/>	<input type="text"/>

Make Up Does Not Meet Medicaid Requirements

Session Notes:

save cancel



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPE PORTAL

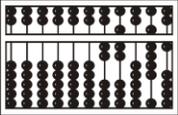
Entering Attendance on Calendar

Weekly Attendance

Doe, Jane - SLP Jump To: 04/05/15 **Save**

<< today >> **Apr 05, 2015 - Apr 11, 2015**

	Sunday Apr 05, 2015	Monday Apr 06, 2015	Tuesday Apr 07, 2015	Wednesday Apr 08, 2015	Thursday Apr 09, 2015	Friday Apr 10, 2015
8AM						
9AM						
10AM			10:15 am to 10:45 am Smith, Mark			
11AM						
12PM						
1PM						
2PM						
3PM						
4PM						



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

**CP
SE** PORTAL

Therapist Activity Report

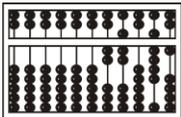
Attendance x www.oms.nj x Product Back x Portal - CPS x Migrating T x Login Succ x Therapist Ac x https://traini x Tove Lo - H x 5 Most U x David x

← → ↻ 🏠 https://training.cpseportal.com/Reports/Therapist_Activity_Output.aspx?pr=&pi=459&cn=&fd=&td=&ci=6069&ccn=53&cdi=39 ☆ ☰

 **Therapist Activity** Printed: 6/24/2015 4:39:15 PM

BOTTJER, Eudasia Page 2 of 69

Date / Time	Setting	Child	ICD/CPT Codes	Notes	
09/06/13 In: 12:15PM Out: 12:45PM	Daycare	AQUILA, JOHN GARRETT CBRS1314W0011775(ST-g)	315.32 92508x1	THESE NOTES ARE FOR DEMONSTRATION PURPOSES ONLY.	Notes Entered: 10/9/2013 11:56:44 AM Notes Last Modified: 6/23/2015 6:10:10 PM Signed: 10/10/2013 DEMO CREDENTIALS Cosigned: 10/10/2013 NOT COSIGNED Meets Medicaid Requirements: N/A
09/09/13 In: 12:30PM Out: 01:00PM	Daycare	AQUILA, JOHN GARRETT CBRS1314W0011774(ST-i)	315.32 92507x1	THESE NOTES ARE FOR DEMONSTRATION PURPOSES ONLY.	Notes Entered: 10/9/2013 11:56:44 AM Notes Last Modified: 6/23/2015 6:10:10 PM Signed: 10/10/2013 DEMO CREDENTIALS Cosigned: 10/10/2013 NOT COSIGNED Meets Medicaid Requirements: N/A



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

 **PORTAL**

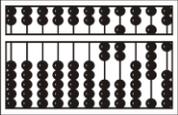
Classroom Attendance Report

CPSEExchange Classroom Attendance Printed: 6/24/2015 4:51:06 PM

Classroom: Child's Place(CB)(SY14-15) Page 1 of 1

Month: 4/2015 **Attendance Legend**
U - Unsigned S - Signed

Child Name	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T
ABBOTT, John aka Jack	S	S											S	S	S	S				S	S	S	S
ABIKZER, Tremaine	S																			S	S		S
AMONORTEGA, Joleigh	S	S											S	S	S	S				S	S		S
BLUMBERG, Sayad	S	S											S	S	S	S				S	S		S
DANTONA, Vincent Micheal	S	S											S	S	S	S				S	S		S
IANNOTTI, Korveh	S												S	S	S	S				S	S		S
MEDINAESPINOZA, Gregory	S	S											S	S	S	S				S	S		S
RAMGOOLAN, Jaely	S	S											S	S	S	S				S	S		S
SEPELAK, Yeisan																							
SEPELAK, Yeisan	S	S																		S	S		S
VAITKUS, Zymea													S	S	S	S				S	S		S



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Digitally Sign Attendance

From Date: To Date: Enrollment: County: Provider:

<input type="checkbox"/>	Last Name	First Name	Service Date	Service Setting	CoVisit	Make Up	Start	End	CPT	ICD	Notes	<input type="button" value="Edit"/>
<input type="checkbox"/>	MANNIX	Klay	5/05/2015	Daycare							NOTES ARE FOR DEMONSTRATION USES ONLY.	<input type="button" value="Edit"/>
<input type="checkbox"/>	MANNIX	Klay	5/07/2015	Daycare							NOTES ARE FOR DEMONSTRATION USES ONLY.	<input type="button" value="Edit"/>
<input type="checkbox"/>	NYAHAY	Mikiala	5/11/2015	Daycare							NOTES ARE FOR DEMONSTRATION USES ONLY.	<input type="button" value="Edit"/>
<input type="checkbox"/>	NYAHAY	Mikiala	5/13/2015	Daycare							NOTES ARE FOR DEMONSTRATION USES ONLY.	<input type="button" value="Edit"/>
<input type="checkbox"/>	NYAHAY	Mikiala	5/18/2015	Daycare							NOTES ARE FOR DEMONSTRATION USES ONLY.	<input type="button" value="Edit"/>
<input type="checkbox"/>	NYAHAY	Mikiala	5/19/2015	Daycare							NOTES ARE FOR DEMONSTRATION USES ONLY.	<input type="button" value="Edit"/>
<input type="checkbox"/>	NYAHAY	Mikiala	5/26/2015	Daycare							NOTES ARE FOR DEMONSTRATION USES ONLY.	<input type="button" value="Edit"/>
<input type="checkbox"/>	NYAHAY	Mikiala	5/29/2015	Daycare							NOTES ARE FOR DEMONSTRATION USES ONLY.	<input type="button" value="Edit"/>

By entering my pin number, I/We certify that on the dates selected, the selected children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

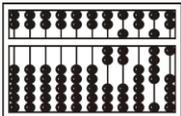
NOTE: Credentials are REQUIRED to sign. Please verify credentials on your [profile page](#).

Name & Credentials:

NPI:

Date:

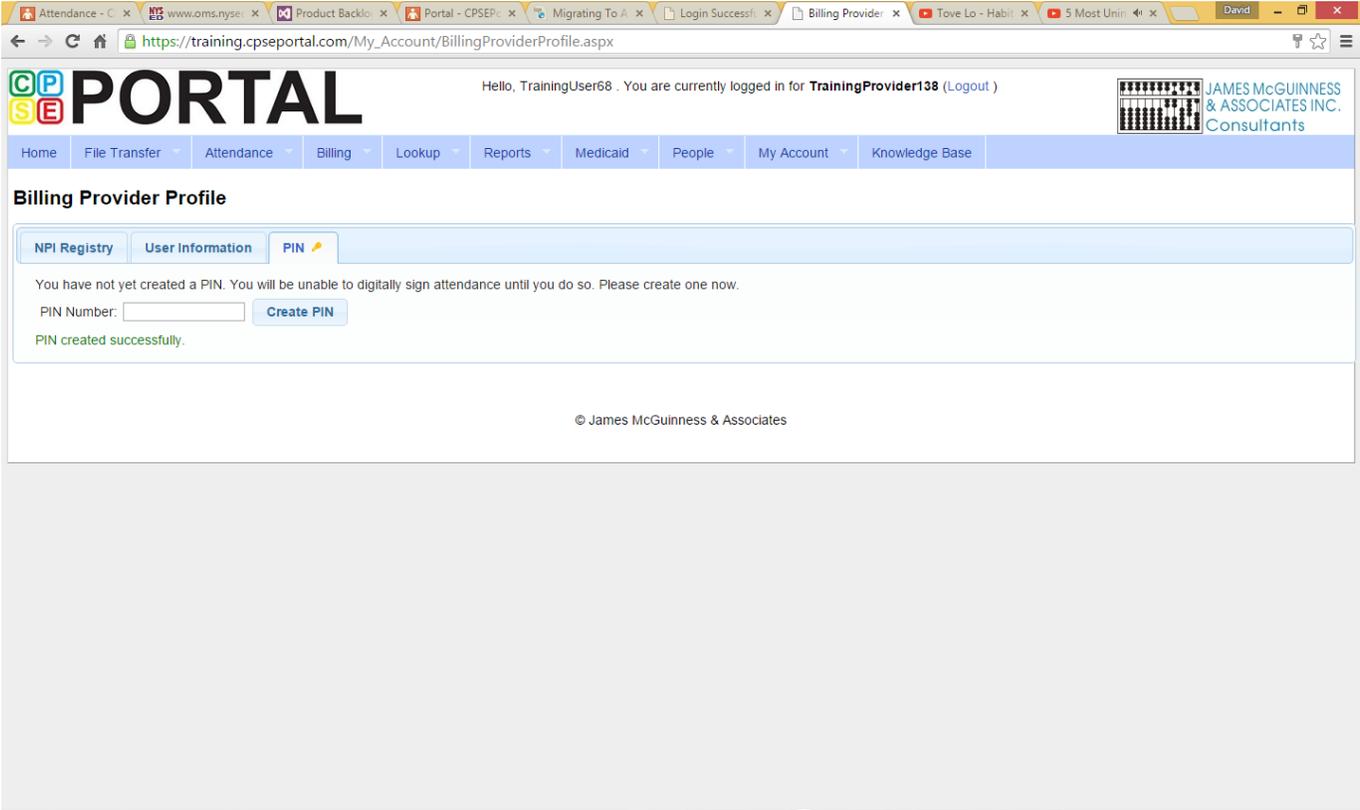
Pin:



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE PORTAL

Billing Provider PIN



The screenshot shows a web browser window with the URL https://training.cpseportal.com/My_Account/BillingProviderProfile.aspx. The page header includes the CPSE PORTAL logo, a user greeting for TrainingUser68, and the company name JAMES McGUINNESS & ASSOCIATES INC. Consultants. A navigation menu contains links for Home, File Transfer, Attendance, Billing, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The main content area is titled "Billing Provider Profile" and features three tabs: "NPI Registry", "User Information", and "PIN". The "PIN" tab is active, displaying a message: "You have not yet created a PIN. You will be unable to digitally sign attendance until you do so. Please create one now." Below this message is a text input field for the "PIN Number" and a "Create PIN" button. A confirmation message "PIN created successfully." is visible at the bottom of the form area. The footer of the page contains the copyright notice "© James McGuinness & Associates".

Voucher Management

Attendance - C x www.oms.nyse x Product Backlo x Portal - CPSEP x Migrating To A x Login Success x Create Vouche x Tove Lo - Habil x 5 Most Unin x David

← → ↻ 🏠 🔒 https://training.cpseportal.com/Attendance/Create_Update_Voucher.aspx ☆ ☰

CPSE PORTAL Hello, TrainingUser68 . You are currently logged in for **TrainingProvider138** (Logout)  **JAMES McGUINNESS & ASSOCIATES INC. Consultants**

Home File Transfer Attendance Billing Lookup Reports Medicaid People My Account Knowledge Base

Create/Edit Voucher

Parameters

SCHENECTADY CBRS 2014 - 2015 Winter

Info

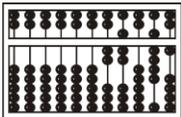
Voucher # Description

Billing Date Claimant Title

Authorized Claimant

Cancel Save

© James McGuinness & Associates



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Voucher Summary

1 2



Voucher Summary

Printed: 6/3/2015 4:33:09 PM

Page 1 of 1

Provider: TrainingProvider138
Vendor#: 00780
Tax ID:
SED Provider Code: 491700880269
Bill To County: SCHENECTADY

Bill Date: 4/30/2015
Voucher#: CB150513114018
Service Month: April 2015
Voucher Description: April Int5.0 Tuition

Child Name	ESID	Program Code	Frequency	Rate	Billing Method	Paymt Type	Month	Amount
AQUILA, JOHN GARRETT	CB1415W0007142	9160	5 hrs/day - I	\$658.15	WEEKLY DYNAMIC	R	Apr-15	\$2,632.60
CARAMIHAL, GIOVANNI JR	CB1415W0007251	9160	5 hrs/day - I	\$658.15	WEEKLY DYNAMIC	R	Apr-15	\$2,632.60
CONGERO, Jevok	CB1415W0007438	9160	5 hrs/day - I	\$657.32	WEEKLY DYNAMIC	R	Apr-15	\$2,629.28
HAGERTY, Faeten	CB1415W0007289	9160	5 hrs/day - I	\$658.15	WEEKLY DYNAMIC	R	Apr-15	\$2,632.60
MARINUCCI, Nameer	CB1415W0007219	9160	5 hrs/day - I	\$658.15	WEEKLY DYNAMIC	R	Apr-15	\$2,632.60
PINZON, Satavia	CB1415W0007244	9160	5 hrs/day - I	\$658.15	WEEKLY DYNAMIC	R	Apr-15	\$2,632.60
RAGHAVENDRA, Aidann	CB1415W0007246	9160	5 hrs/day - I	\$658.15	WEEKLY DYNAMIC	R	Apr-15	\$2,632.60
RAPP, ANAE	CB1415W0007422	9160	5 hrs/day - I	\$657.86	WEEKLY DYNAMIC	R	Apr-15	\$2,631.44
REZNIKOV, Arain	CB1415W0007454	9160	5 hrs/day - I	\$657.59	WEEKLY DYNAMIC	R	Apr-15	\$2,630.36
RISKOVIKH, Kevante	CB1415W0007087	9160	5 hrs/day - I	\$658.15	WEEKLY DYNAMIC	R	Apr-15	\$2,632.60
SAHU, Jalyianna	CB1415W0007479	9160	5 hrs/day - I	\$656.37	WEEKLY DYNAMIC	R	Apr-15	\$2,625.48
SCHWARTZBERG, Atlanta	CB1415W0007249	9160	5 hrs/day - I	\$658.15	WEEKLY DYNAMIC	R	Apr-15	\$2,632.60
VASILIOU, Aaralyn	CB1415W0007475	9160	5 hrs/day - I	\$657.74	WEEKLY DYNAMIC	R	Apr-15	\$2,630.96
Grand Total:								\$34,208.32

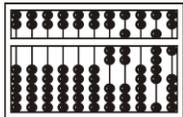
I certify that on the dates above, the above named child received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Authorized Signature: _____ Certification: _____



Classroom Attendance

Printed: 6/3/2015 4:33:10 PM



JAMES MCGUINNESS & ASSOCIATES INC.
 Consultants



Voucher Summary

2 2



Classroom Attendance

Printed: 6/3/2015 4:33:10 PM

Page 1 of 1

Provider: TrainingProvider138
County: SCHENECTADY

Classroom: Schenectady Day(SY 14-15) **Month:** April 2015

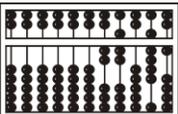
	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T							
Child Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
CARAMIHAI, GIOVANNI JR	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
HAGERTY, Faelen	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
MARINUCCI, Nameer	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
PINZON, Satavia	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
SCHWARTZBERG, Atlanta	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
VASILIOU, Aaralyn	X	X											X			X	X			X	X	X	X	X			X	X	X	

Classroom: St. Anthony's(SY 14-15) **Month:** April 2015

	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T							
Child Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
AQUILA, JOHN GARRETT	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
CONGERO, Jevak	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
RAGHAVENDRA, Aidann	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
RAPP, ANAE	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
REZNIKOV, Arain	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
RISKOVICH, Kevante	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	
SAHU, Jalyianna	X	X											X	X	X	X	X			X	X	X	X	X			X	X	X	

I certify that on the dates above, the above named children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Signature: _____



JAMES McGUINNESS & ASSOCIATES INC.
 Consultants



RS Voucher Summary



Voucher Summary

Printed: 6/3/2015 4:33:31 PM

Page 1 of 1

Provider: TrainingProvider138 **Bill Date:** 4/30/2015

Vendor#: 00780 **Voucher#:** RS150513115044

Tax ID: **Service Month:** April 2015

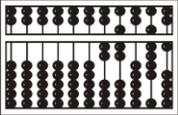
SED Provider Code: 491700880269 **Voucher Description:** April Related Service

Bill To County: SCHENECTADY

Child Name	ESID	Frequency	Service	Dates Of Service	Rate	Units	Minutes Per Unit	Amount
BLYMAN, Ethan Rickswell	RS1415W0011143	2x30 -I	RS - PT	Apr 2015 - 22, 24, 29	\$45.00	3.00	30	\$135.00
COLLURA, Reeve	RS1415W0010620	2x30 -I	RS - ST	Apr 2015 - 1, 15, 17, 22, 23, 29	\$45.00	6.00	30	\$270.00
ECKHARD, Oshyn	RS1415W0010597	2x30 -I	RS - PT	Apr 2015 - 1, 14, 15, 21, 23, 28, 30	\$45.00	7.00	30	\$315.00
ECKHARD, Oshyn	RS1415W0010595	2x30 -I	RS - ST	Apr 2015 - 16, 17, 20, 21, 28	\$45.00	5.00	30	\$225.00
ECKHARD, Oshyn	RS1415W0010596	1x30 MONTHLY -	RS - COR	Apr 2015 - 28	\$45.00	1.00	30	\$45.00
FORTUNOFF, Zain	RS1415W0010893	2x30 -I	RS - ST	Apr 2015 - 2, 16, 23, 24, 30	\$45.00	5.00	30	\$225.00
MEYER, Stratton	RS1415W0010600	1x30 -I	RS - PT	Apr 2015 - 14, 16, 23, 30	\$45.00	4.00	30	\$180.00
MEYER, Stratton	RS1415W0010599	2x30 -I	RS - ST	Apr 2015 - 15, 17, 20, 21, 27, 28	\$45.00	6.00	30	\$270.00
MEYER, Stratton	RS1415W0010601	1x30 MONTHLY -	RS - COR	Apr 2015 - 28	\$45.00	1.00	30	\$45.00
YACONIS, Farris	RS1415W0010780	3x30 -I	RS - ST	Apr 2015 - 1, 2, 15, 16, 17, 22, 23, 24, 29	\$45.00	9.00	30	\$405.00
Grand Total:								\$2,115.00

I certify that on the dates above, the above named child received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Authorized Signature: _____ Certification: _____



Parent Signature Log

Preschool Parent / Caregiver Signature Log

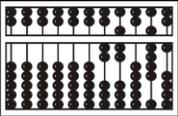
Child Name _____ DOB _____ Therapist _____
 District _____ Discipline _____
 County _____ NPI _____ License# _____
 Agency _____ NPI _____ Service _____
 Frequency _____ Duration _____

Month _____ Year _____

	Start Time	End Time	Caregiver / Verifying Witness Signature		Start Time	End Time	Caregiver / Verifying Witness Signature
1				17			
2				18			
3				19			
4				20			
5				21			
6				22			
7				23			
8				24			
9				25			
10				26			
11				27			
12				28			
13				29			
14				30			
15				31			
16							

I certify that on the dates above, the above named child received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Therapist Signature _____

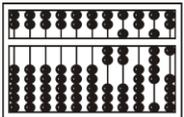


**JAMES MCGUINNESS
& ASSOCIATES INC.**
Consultants



Schema for Attendance File Upload

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



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

**CP
SE** PORTAL

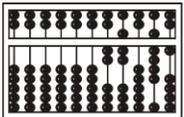
Webinars

- ▶ Independent Therapists
 - ▶ My Profile
 - ▶ Entering Attendance

Tuesday June 30th - 4 PM

Thursday July 2nd - 10 AM

Monday June 6th- 3 PM



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

C**P****S****E** **PORTAL**

Webinars

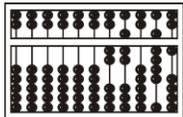
- ▶ Agencies office staff
 - ▶ User setup / inviting users
 - ▶ Assigning caseload
 - ▶ Enrollments

Monday June 29th- 3 PM

Tuesday July 7th - 4 PM

Wednesday July 8th - 10 AM

Thursday July 9th - 3 PM



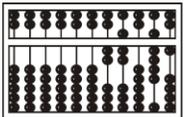
JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

 **PORTAL**

The logo features the letters 'C', 'P', 'S', and 'E' each enclosed in a small, colored square (green, blue, yellow, and red respectively), arranged in a 2x2 grid to the left of the word 'PORTAL' in a large, bold, black sans-serif font.

Claims Clients

- ▶ Additional Webinar from CLAIMS team showing how to upload from CLAIMS



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

**CP
SE** PORTAL