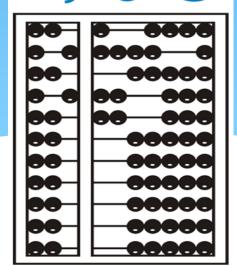
Dutchess County eSTACs Getting Started -Entering Children and STAC-5



Dutchess County Timeline

* February 29, 2024:

* McGuinness will migrate all of the children that are in the Dutchess County Preschool system over into eSTACs.

* March 1, 2024:

- * Dutchess County school districts can begin entering 24/25 children and STACs into eSTACs.
- * All prior year STAC's (23/24, 22/23, 21/22 etc.), send paper STAC to the county to enter or amend in their Preschool system. Prior years will not be turned on in eSTACs and you will not be able to enter any STACs.

What is eSTACs

- * eSTACs is part of our CPSE Portal website (https://www.cpseportal.com).
- * It is a series of screens to facilitate the communication of STAC related information from the school district to the County.
- * The goal is to eliminate sending paper between from the district to the County (or at least get very close).

Types of Information

- * The following information can be sent to the County via eSTACs
 - Evaluation information (eliminating need for STAC-5)
 - Service information (eliminating need for STAC-1)
 - Supporting documentation including
 - Medicaid Parental Consents
 - * Transportation forms
 - * IEP
 - * Aide / Nurse forms
 - * Birth certificate, passport, adoption papers, legal name change document
 - * More....

District Designation of Digital Signatories for eSTACs Form

- * Each school district completes a District Designation of Digital Signatories for eSTACs form.
 - * This form will designate the CPSE Chair and all staff who will have access to eSTACs, and will be marked as to **who can** sign & submit STAC-1 & STAC-5's for the school district.
 - * McGuinness will enter all staff listed on the form and invite them to the Portal.
 - * Once the school district staff accepts the invitation, and sets up their Portal account, then McGuinness will give the staff the necessary permissions to each staff to sign according to what is marked on the form.
 - * If you want staff to do entry work, but **NOT** sign & submit STAC's, then do not check off any of the boxes.
- * If the school district has a change in staff or needs to add staff signing privileges, a new form should be completed, and sent to McGuinness.

District Designation of Digital Signatories for eSTACs

District Designation of Digital Signatories for eSTACs					
District	strict Designation of Digital S	gnatones for esta	<u></u>		
CPSE Chairperson					
I authorize of the following individudistrict.	uals to use a digital signature to submit el	ectronic STAC records the	eSTACs system	on behalf of our	
Name	eMail	Position / Title	STAC-5	STAC-1	
		CPSE Chairperson			
We certify that for any STAC-5 that the above individuals electronically sign and submit through the eSTACs system, the child has received the submitted multidisciplinary evaluation in accordance with Section 4410 of the Education Law and the Regulations of the Commissioner of Education and we maintain proper documentation to support this. We certify that for any STAC-1 that the above individuals electronically sign and submit through the eSTACs system, the preschool student with a disability is being provided the educational services submitted and that such services have been recommended by the Committee on Preschool Education and that the child is eligible for such placement in accordance with Section 4410 of the Education Law and the Regulations of the Commissioner of Education and we maintain proper documentation to support this.					
Name	Title	Date		e completed form to 38 attention eSTACs.	



Getting Started

- * Each district has a login to the CPSE Portal.
- * That single login can "invite" additional users from their district.
- * Every individual that logs in for a district should have their own username & password.
- * When a person receives an invite, they can then click a link to accept the invitation and create a username and password.

Inviting New Users

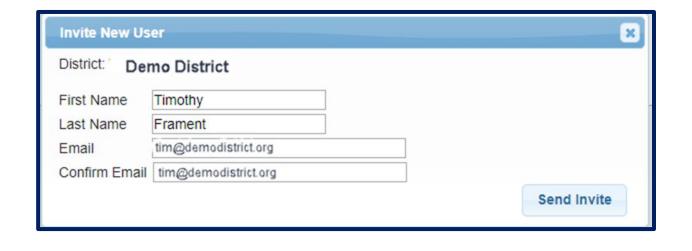


- * Go to People -> District Users
- * Click "Invite New User".



Inviting New Users

- * Enter First Name, Last Name & Email address of new user, and click "Send Invite".
- * CPSE Portal will send an email inviting the new user to join the Portal.



Accepting the Invitation

- * The new user will receive the below email containing a link to join the Portal.
 - * The link will come from **noreply@CPSEPortal.com**.

From: noreply@CPSEPortal.com

Sent: Thursday, January 31, 2019 9:56 PM

Subject: User Invitation

Timothy Frament,

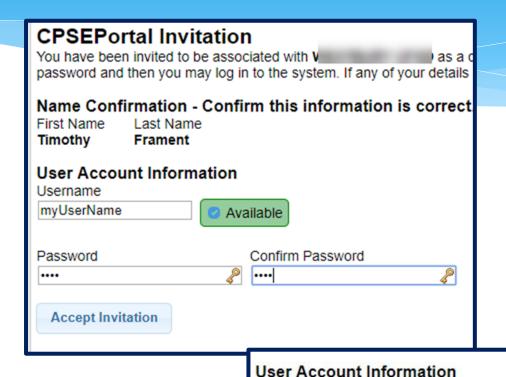
You have been invited to be associated with the district DEMO DISTRICT in the <u>CPSEPortal</u> system. Please follow the link below to confirm this invitation, and associate yourself with this district.

http://localhost/CPSEPortal/People/Invites/DistrictInvitationResponse.ashx?code=db7d8f7ab79a4ddebd037d9c855e36fc

NOTE: This is an automated email and should not be replied to.

Choosing Username and Password

- * The confirmation page allows the user to choose a username and password, and "Accept Invitation".
- * When the individual enters their choice for a username the screen will display whether that name is available or not.



Username

Password

Accept Invitation

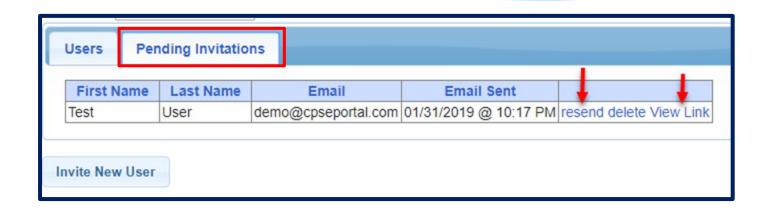
demodistrict

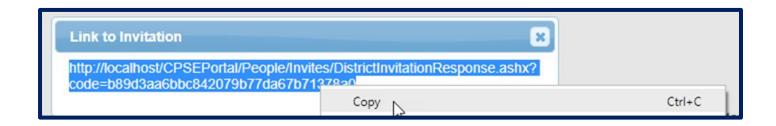
A Taken

Confirm Password

Invitation Issues – User did not receive an email

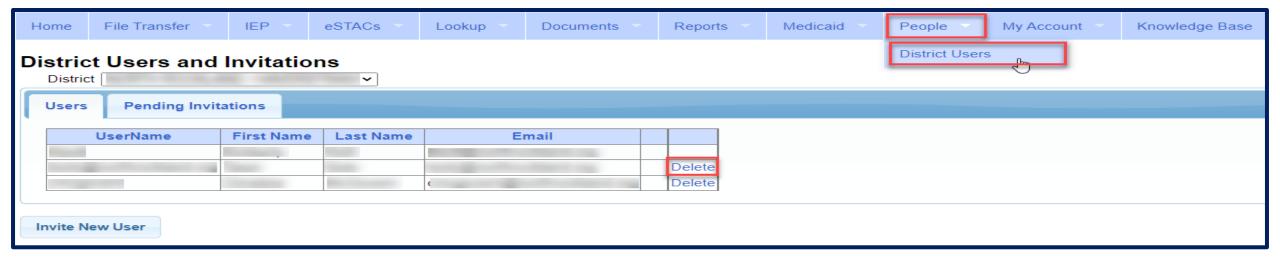
- * Have user check their junk / spam folder.
- * Use the Pending Invitations tab under **People** -> **District Users** to either:
 - * Resend link
 - Copy the link and send with your email





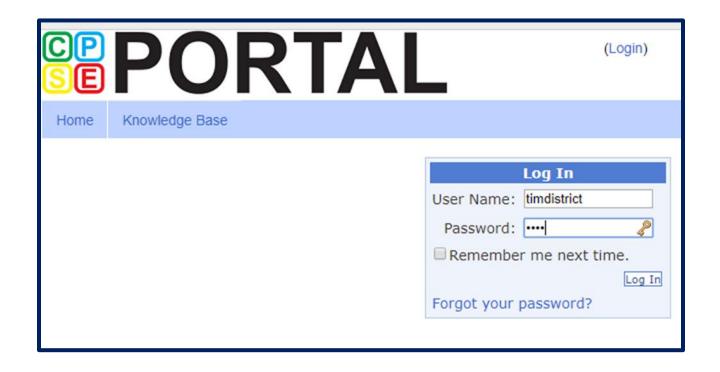
Deleting District Users

- * If a staff member leaves their position the CPSE Chair listed in the Portal can delete them from the Portal.
- * Go to People -> District Users
- * Select the "Delete" option next to the staff members name.



Logging In

- * Use your browser to navigate to https://www.cpseportal.com
- * Enter your User Name and password.



Digital Signature – User Profile

- * The user's account should have that individuals first and last name associated with the account.
- * You can easily see whether your account has the first and last name entered by looking user profile panel on the dashboard when you first log in.
- * To add or edit First & Last name, click **My Account** -> **User Account Details**.





Digital Signature

- * Go to My Account -> User Account Details
- * Use the User Account Details page to enter / edit your Last name and First name for your account.
- * Click "Update" to save the changes

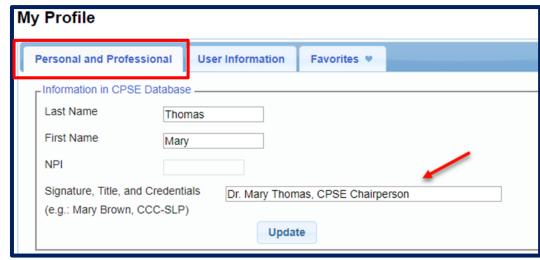




Digital Signature – Signature & Title

- * Go to My Account -> My Profile
- * On the Personal and Professional tab, ensure that your first and last name are correct.
- * Enter your Signature & Title by typing out your "signature" exactly as it would be if you signed your name with a pen. Include any punctuation, titles, etc. that you include when you sign your name for CPSE related documents.
- * Click "Update" to save your changes.





Digital Signature – Creating Your Pin

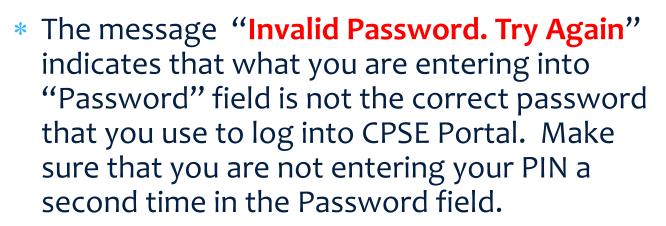
- * Go to My Account -> My PIN
- * To create your PIN:
 - * 1 Choose a PIN and type it in the PIN Number field.
 - * 2 Enter your username that you log in with (should be prefilled).
 - * 3 Enter your password that you use to login to CPSE Portal.
 - * 4 Click "Save PIN".

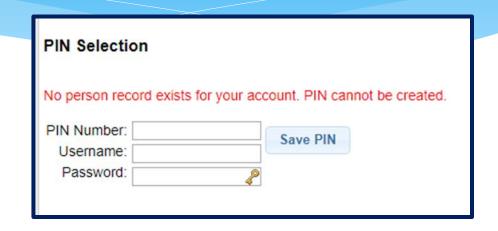




Digital Signature – Creating PIN Problems

* The message "No person record exists for your account. PIN cannot be created." indicates that you did not perform Step #1 – Entering your first and last name for the user account.





PIN Selection	
You have already chosen a PIN. Invalid Password. Try again.	
PIN Number: Username: RyDellUser Password:	Change PIN

Forgotten Passwords

- * User can click "Forgot your password?" on login screen.
- * Enter your username and click "Submit".
- * An email with a new password will be sent to your email address.

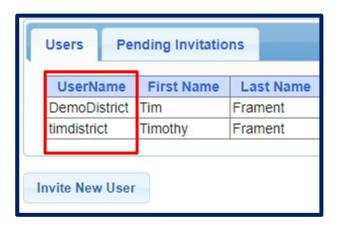




Forgotten Usernames

* Any district user (or County user) can use the district users screen to view all the users and see what their username is.

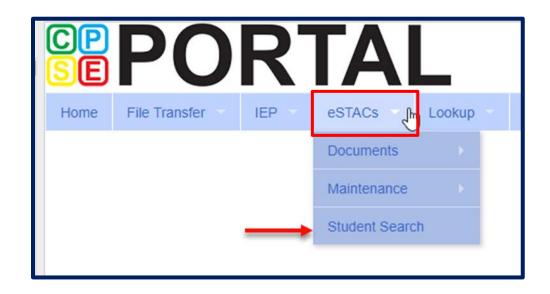
* Go to People -> District Users



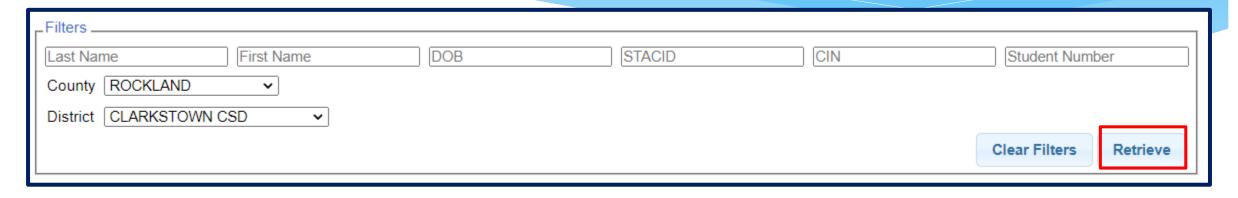
eSTACs Entering Children

eSTACs Student Search

* Go to eSTACs -> Student Search

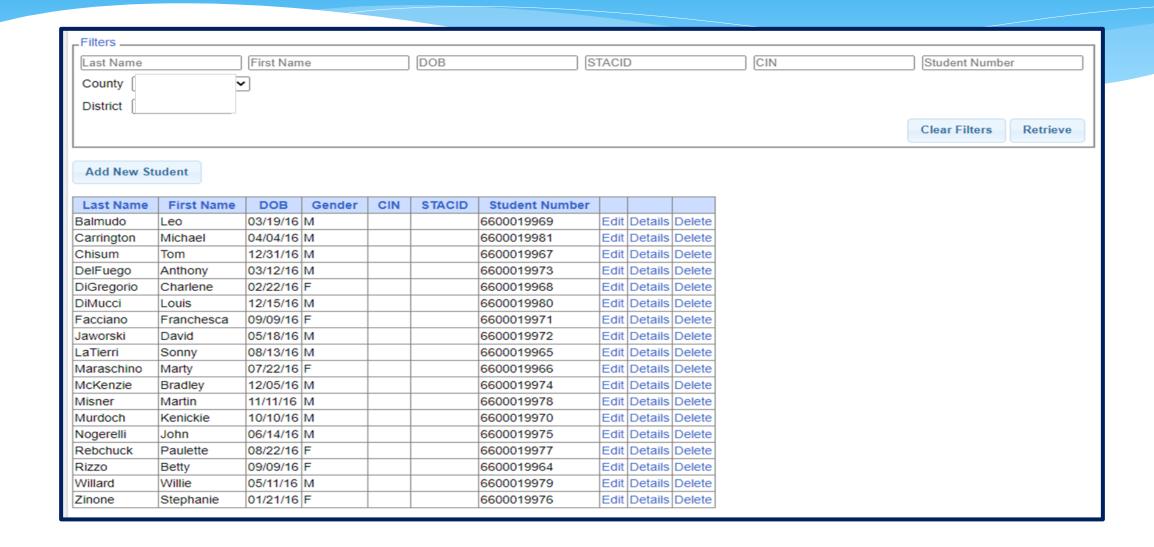


Student Search



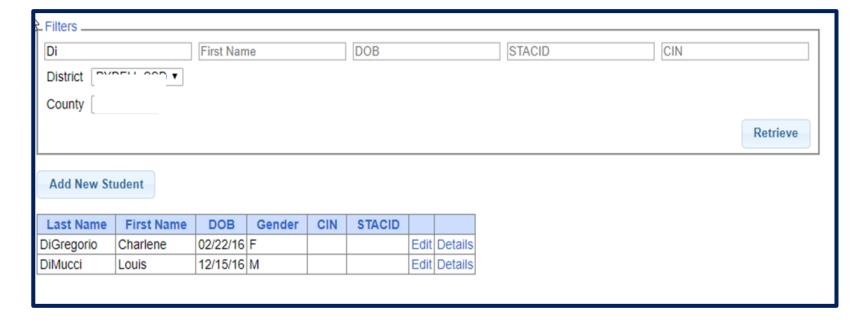
- * ALWAYS search to make sure the child isn't already in the system.
- * The fields above are used as filters to find a specific child. You can search based on any combination of fields.
- * Searching with no filters specified will return all children. Click "Retrieve".

Student Search – no Filters



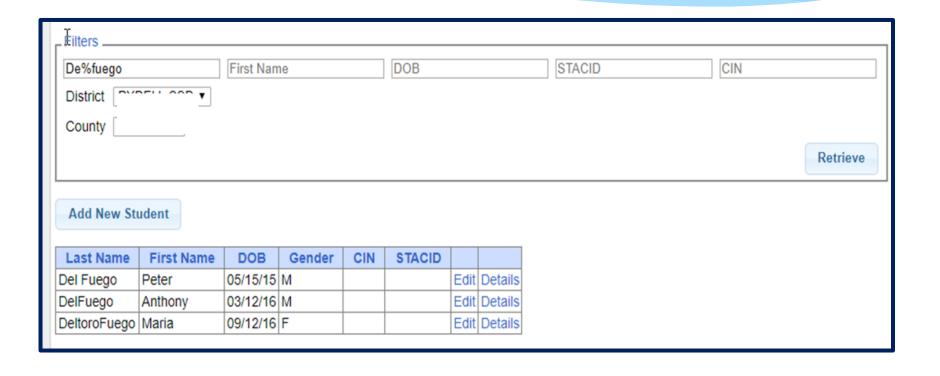
Student Search – Partial Name

* For the first and last name you can enter the first few letters and search to find all students that name start with those letters.



Student Search - Wildcard

* Use the percent sign (%) as a wildcard.



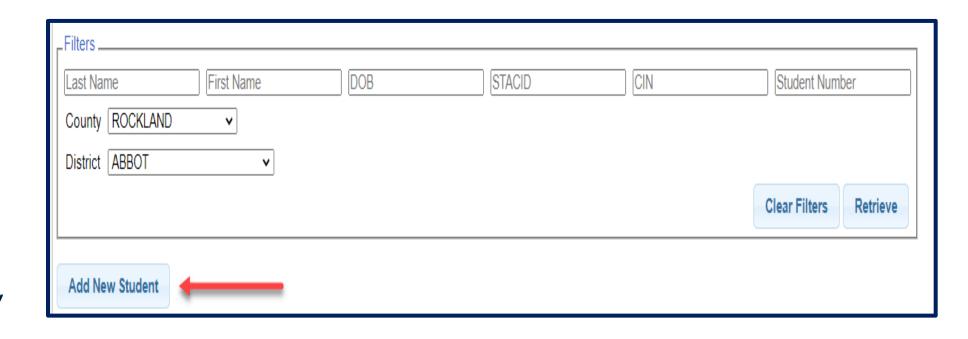
Student Search – Multiple Fields

* You can search for both first and last name as well as partial first and last names.



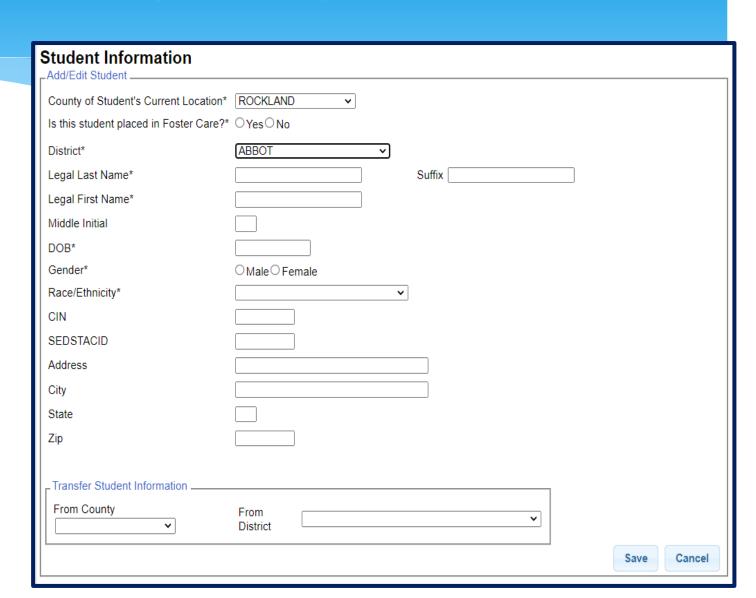
Adding a Student

- * Go to the Student Search screen.
- * Verify student is not already in system.
- * Click on "Add New Student" button.



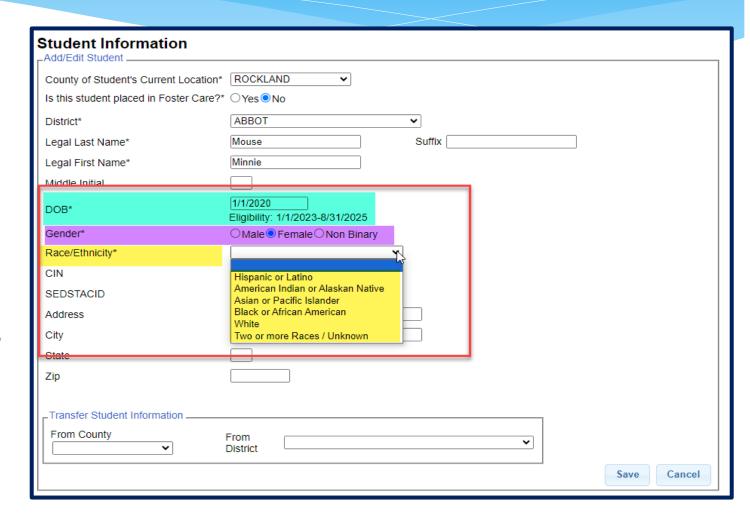
Student Information

- Field with an asterisk (*) next to their label are required in order to save.
- * When creating a child:
 - * If the child is a Jr/II/III, please enter this information in the Suffix box. Do not include this with the child's last name.
- * Dutchess County requires the address of the child.
- * Other fields should be entered if the information is known.



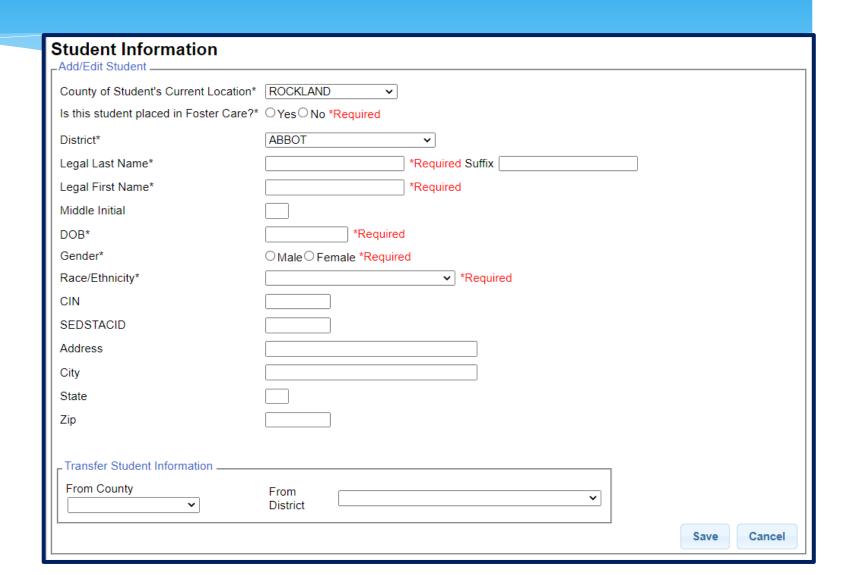
Student Information

- * When you enter the DOB, the dates of eligibility will populate.
- * Gender now contains "Non Binary" if needed.
- * Race/Ethnicity field contains "Two or more Races / Unknown" if you do not know the race.



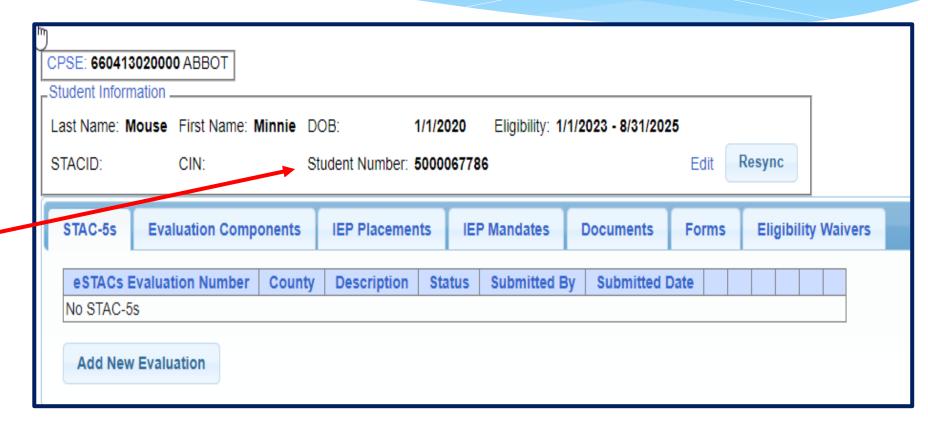
Saving Incomplete Entry

- * Clicking "Save" without all mandatory fields entered will result in labels indicating the missing data.
- * If you do not enter the child's address, you will not be able to submit the STAC-5 or STAC-1.



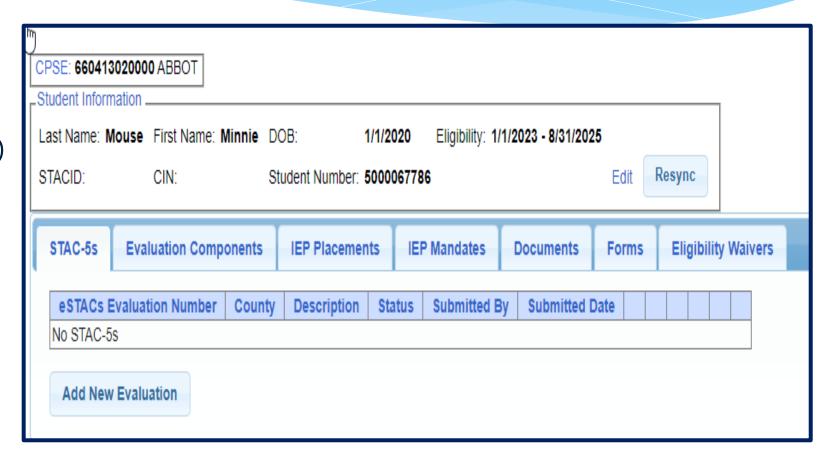
Student Details

- * Upon saving a new student, the system will take you to the student details page.
- Once student is ____ created, each child is given a Student Number.



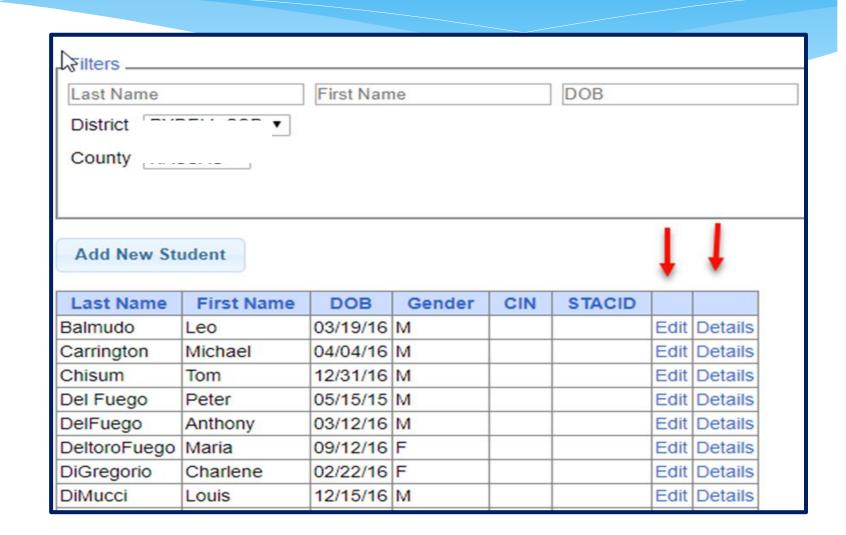
Student Details

- Top section shows child demographic information.
- * Lower section has tabs for:
 - * STAC-5s (one row per STAC-5)
 - Evaluation Components (one row per evaluation component)
 - * IEP Placements (one row per STAC-1)
 - IEP Mandates (one row per mandated service on IEP)
 - Documents (uploaded documents for student)
 - * Forms
 - Eligibility Waivers



Editing Existing Student

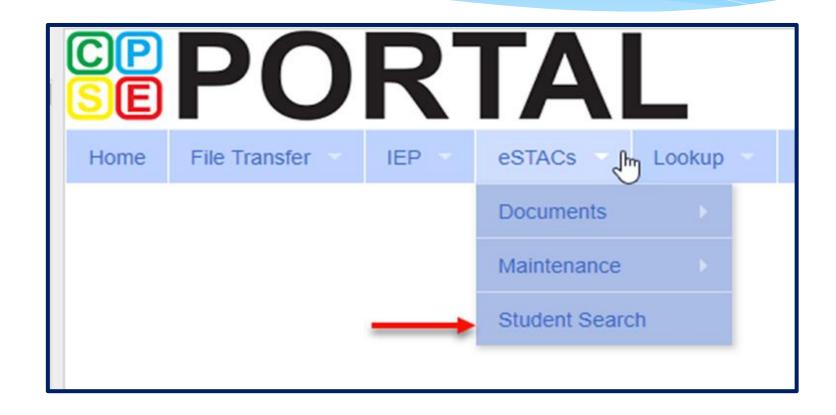
- * Search for student
- * Click "Edit" to edit student demographics (name, address, etc.)
- * Click "Details" to get to student details page with evaluations, services, documents, etc.



eSTACs Entering STAC-5

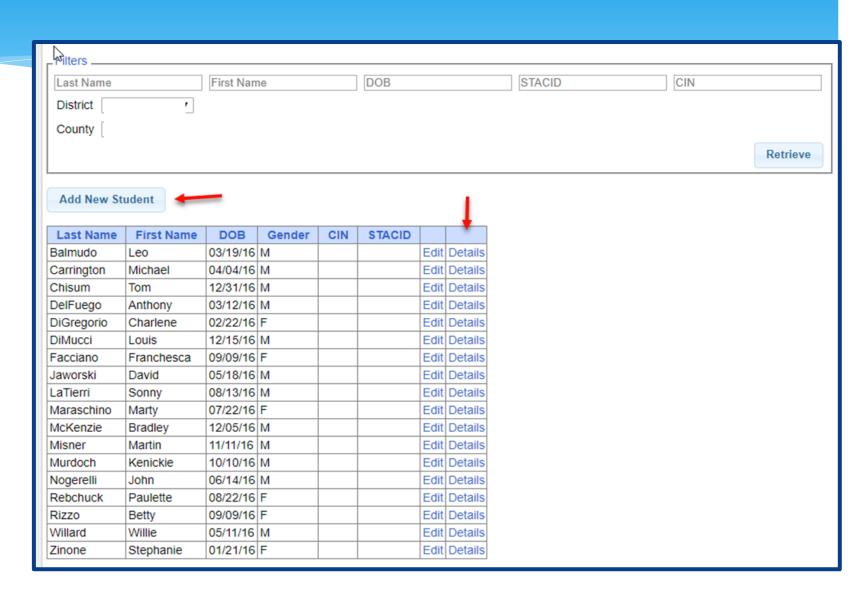
eSTACs Student Search

* Go to eSTACs -> Student Search



Student Search for Student Details

- * Always search for the student first.
- * If student is already in system, click the "Details" link for that student.
- * If student does not exist, click "Add New Student".



Adding a New Evaluation

- * Select the "STAC-5s" tab.
- * Click the "Add New Evaluation" button.



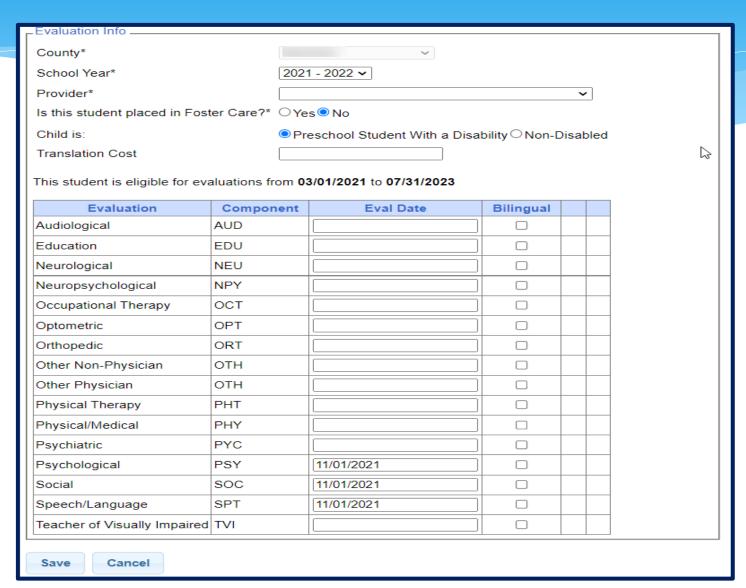
eSTACs vs Paper STAC-5

Evaluation Into							
County*		WES	STCHESTER V 2				
School Year*		2020 - 2021 🕶					
Provider*		v 1					
Is this student placed in Fo	ster Care?*	Ye	s O No				
County at time of placemer	it*		2				
Child is:		OPreschool Student With a Disability ONon-Disabled					
Translation Cost		5					
This student is eligible for e							
Evaluation Social	SOC	nent	Eval Date	Bilingual			
Psychological	PSY						
	SPT						
Speech/Language	+						
Physical Therapy	PHT						
Occupational Therapy	OCT						
Physical/Medical	PHY			U	6		
Education	EDU				Ť.		
Audiological	AUD						
Other Physician	ОТН						
Other Non-Physician	ОТН						
Psychiatric	PYC						
Neurological	NEU						
Optometric	OPT						
Orthopedic	ORT						
Counseling	CSL						
Functional Vision	FUV						
Teacher of Visually Impaire	d TVI						
Neuropsychological	NPY						

STAC-5	ity of the State of New York EDUCATION DEPARTMENT C and Medicaid Unit			Rev. 8/2017			
Request for Com	Request for Commissioner's Approval of Reimbursement for the Cost of Evaluations						
STAC-ID List the date each evaluation component was completed (use four digits to indicate month and year). For bilingual evaluations indicate on line provided.							
STUDENT II	NFORMATION	EVALUATION COMPONENT	MON	TH / YEAR CHECK	K IF BILINGUAL		
Last Name First	t Name Middle Initial	Audiological	AUD				
		Counseling	CSL				
	ification Number Gender	Education	EDU				
	Female Male	Functional Vision	FUV		0		
		Music	MUS		6		
DISABILITY	RACIAL ETHNIC CATEGORY OF STUDENT	Neurological	NEU				
The child named above is:	☐ Hispanic or Latino	Neuropsychological	NPY				
☐ PD - Preschool Student	Not of Hispanic Origin:	Occupational Therapy	00.				
With a Disability American Indian or	☐ American Indian or	Optometric (visual)	OF 1	_/			
□ ND - Non-Disabled	Alaskan Native Asian or Pacific Islander	Orthopedic					
	 □ Black or African American □ Native Hawaiian or other 	Physical/Medical	PHY				
Pacific Islander		Physical Therapy	PHT				
•	☐ Two or more Races	Psychiatric	PYC				
(see explanation of	(see explanation on second page)	Psychological	PSY				
School District with CPSE Responsibility	CPSE District SED (BEDS) Code	Speech / Language	soc				
School District with CPSE Responsibility	School District with CPSE Responsibility CPSE District SED (BEDS) Code		SPT				
		Teacher of Visually Impaired	TVI				
County of Shild's Current Location (where child resides)		Other:					
<u>~</u>		Cost of translation/transmittal of evaluation documentation or summary s					
County at time of Placement in Foster Care		PERSON COMPLETING THIS FORM					
3		Name Title					
Approved Evaluator		Name	Tide				
		Phone	Email				
CERTIFICATION OF EVALUATION: I certif multidisciplinary evaluation as indicated above Education Law and the Regulations of the Com	a MUNCIPALITY: The municipality of has received on / the STAC-5 Request for Commissioner's Approval of Reimbursement for the Cost of Evaluations for the above named child pursuant to Section 4410 of the Education Law.						
7	Signature of Authorized	-					
Signature CPSE ChairpersonDate// Representative of the MunicipalityDate//							

Complete Fields Related to Evaluation

- Enter information regarding evaluation.
- Enter the exact evaluation dates.
- * All fields labeled with an asterisk (*) must be filled in to save.



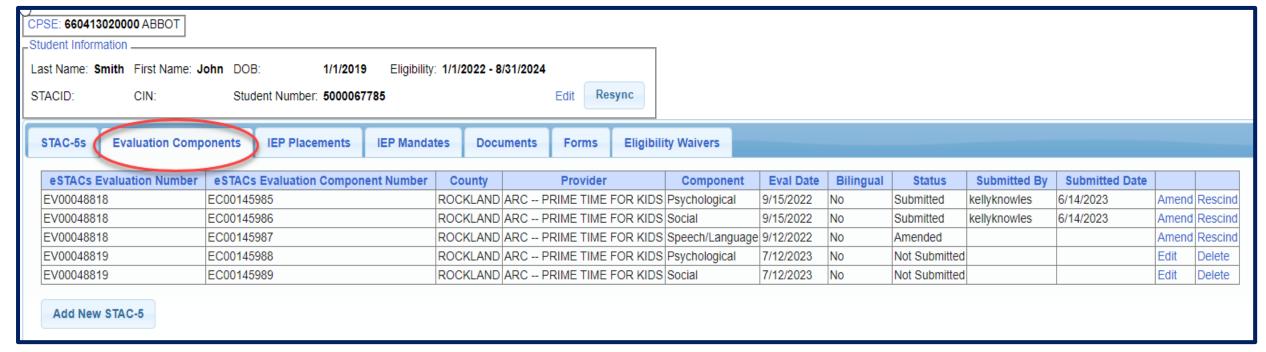
Evaluations – STAC-5 Tab

- * There are two tabs for Evaluations:
- * STAC-5s Tab shows one line per STAC-5 group of components.



Evaluation Components Tab

- * The second tab for Evaluations is the Evaluation Components.
- * Evaluation Components Tab shows one line per component.



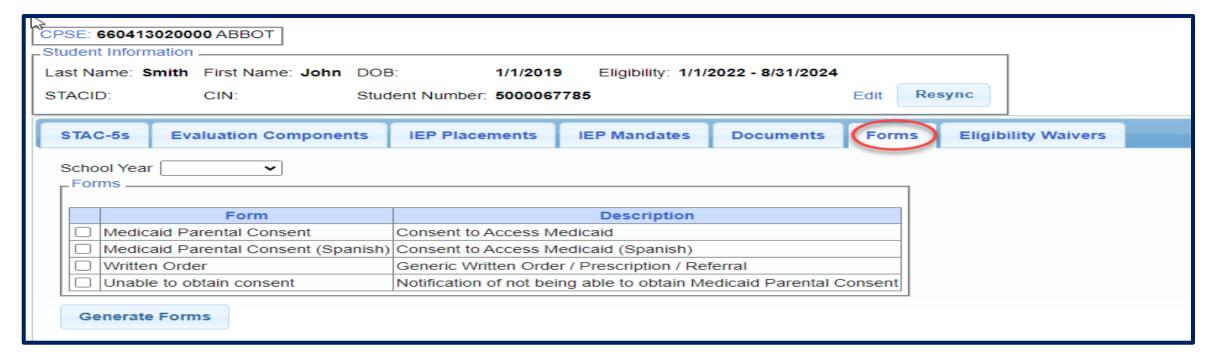
eSTACs Uploading Documents

Documents Required for Evaluations – Dutchess County

- * Dutchess County requires the following documents to be uploaded, before you can sign and submit your STAC-5:
 - * An Evaluation Justification Letter only needed if 2 evaluations need to be completed within the same school year for the same type of evaluation when completing the STAC-5.

Forms Tab

* The Forms tab has a list of generic forms that when chosen, will populate with the child's information on them.



Forms Tab

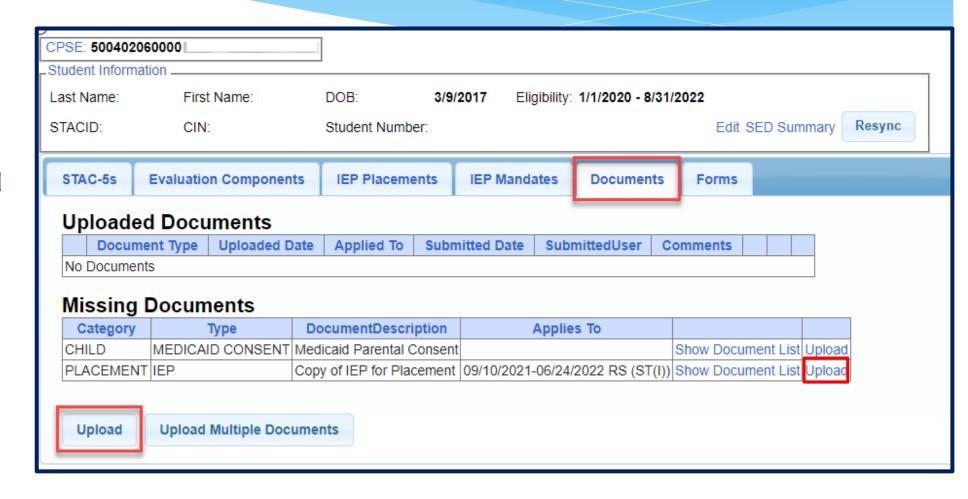
If your County gave us a Medicaid Consent that they want you to use, your County consent will also populate here.

Dear Parent/Guardian of: John Smith District: ABBOT County: ROCKLAND This is to ask your permission (consent) for the listed cor Program for special education and related services that at and to ask you to give us your child's Client Identification to know it.	re on your child's individualized education program (IEP)				
This consent allows the school district/county to bill Med information to the school district's/county's Medicaid Bi					
as the parent/guardian of John Smith					
(Print Parent's Name) (Print Child's Name) (Print Child's Name) have received a written notification from the school district/county that explains my federal rights regarding the use of public benefits or insurance to pay for certain special education and related services. I understand and agree that the school district/county may ask for a Client Identification Number (CIN), check on Medicaid eligibility, and/or access Medicaid to pay for special education and related services provided to my child.					
I understand that: • Providing consent will not impact my child's/my Medicaid coverage; • Upon request, I may review copies of records disclosed pursuant to this authorization; • Services listed in my child's IEP must be provided at no cost to me whether or not I give consent to bill Medicaid and/or provide my child's CIN; • I have the right to withdraw consent at any time; and • The school district/county must give me annual written notification of my rights regarding this consent.					
I also give my consent for the school district/county to release the following records/ information about my child to the State's Medicaid Agency for the purpose of checking Medicaid eligibility and/or billing for special education and related services that are in my child's IEP. The following records will be shared:					
	nformation about services your child receives)				
Prescription	Service Provider Attendance				
Referral	"Under the Direction of" Certification				
Treatment Logs	"Under the Supervision of" Certification				
Individualized Education Program - IEP	"Under the Direction of" Logs				
Attendance Records	"Under the Supervision of" Logs				
Bus Logs	Calendar				
Other unnamed documents needed to support a claim to Medicaid	Evaluations				
Student's CIN, if known: I give my consent voluntarily and understand that I may withdraw my consent at any time. I also understand that my child's right to receive special education and related services is in no way dependent on my granting consent and that, regardless of my decision to provide this consent, all the required services in my child's IEP will be provided to my child at no cost to me.					
Parent/Guardian Signature:	Date:				
Print Name: Must fill-in full date					

Medicaid Consent

Uploading a Document

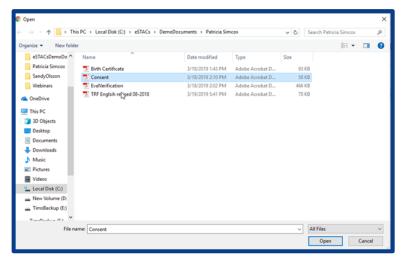
- Select Documents tab on Student Details screen.
- * This will also show any Missing Documents that need to be uploaded.
- * Click "Upload" button at bottom of screen or "Upload" at the end of the missing document line.



Uploading a Document

- Click "Choose File" button.
- * Browse to the file location and select the file.
- * Click the "Open" button on the file dialog
- * The filename will appear next to "Choose File" button.
- * Click "Upload".

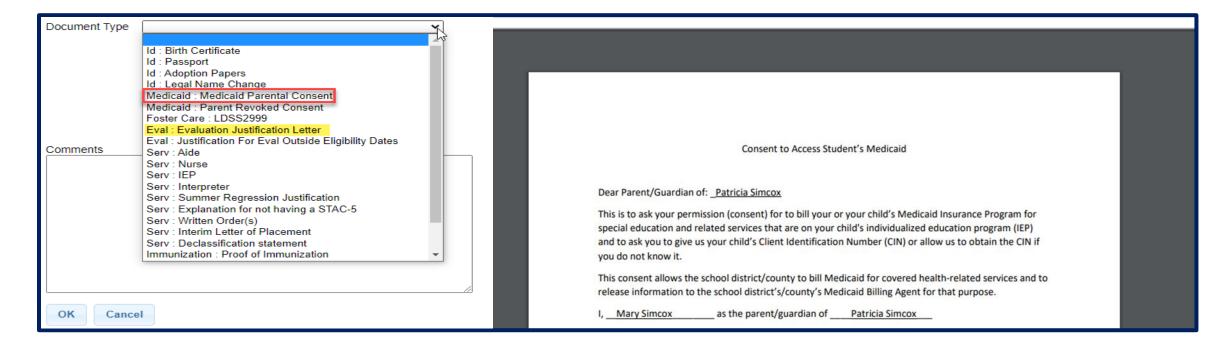






Indicate Document Type

- Right hand side shows the document.
- Left hand side shows fields to specify what type of document it is, as well as other related fields specific to the type of document.



eSTACs Sign and Submit

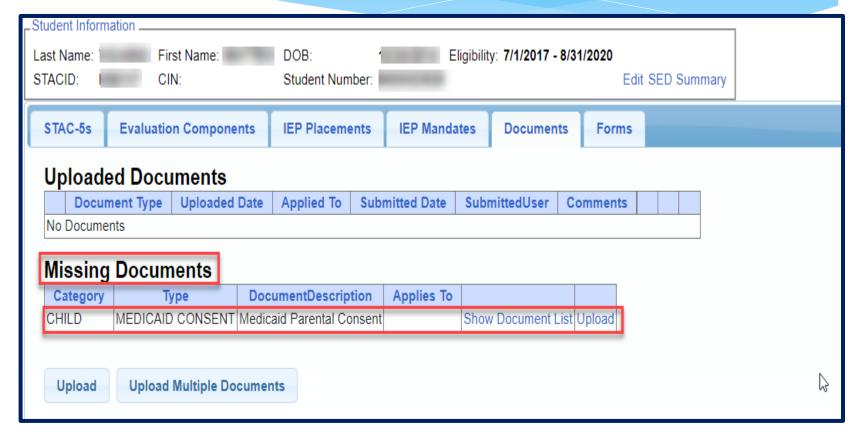
Sign and Submit Evaluation

- * Once all documents have been uploaded for the evaluation (if any), you can now "Sign and Submit" the STAC-5.
- * The Status, Submitted By & Submitted Date columns will now show a status of submitted, who submitted the STAC-5, and the date submitted.
- * This will now be sent to the county for review.



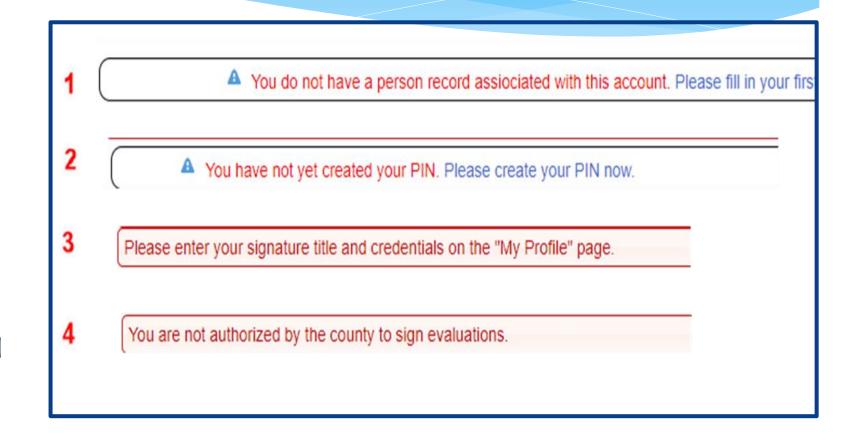
Submitting Evaluations Error Messages – Missing Document(s)

- * If all of your documents are not uploaded, you will not be able to sign and submit.
- * Your error will tell you what documents need to be uploaded.
- * You can also see the missing documents on the documents tab, under Missing Documents.



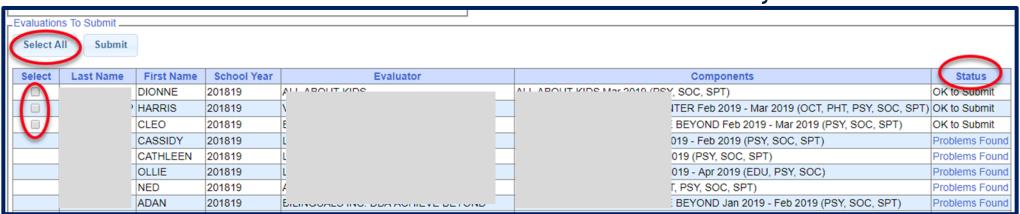
Submitting Evaluations Error Messages

- 1. You did not create your first and last name.
- 2. You did not create a PIN for your Portal account.
- 3. You did not create your signature and title.
- 4. Your district's authorization paperwork was not sent to McGuinness or you are not listed on the paperwork to sign and submit evaluations.



Submitting Evaluations – Unsubmitted Evaluation List

- * Go to eSTACs -> Submit -> Submit Evaluations
- * This grid displays unsubmitted evaluations based on selected filters.
- * Rows where Status = "OK To Submit" will have a checkbox.
- * Rows where Status = "Problems Found" will not have a checkbox.
- * Mark the checkbox on the rows that you wish to submit to the County or click "Select All".
- * Click "Submit" to submit the marked evaluations to the County.



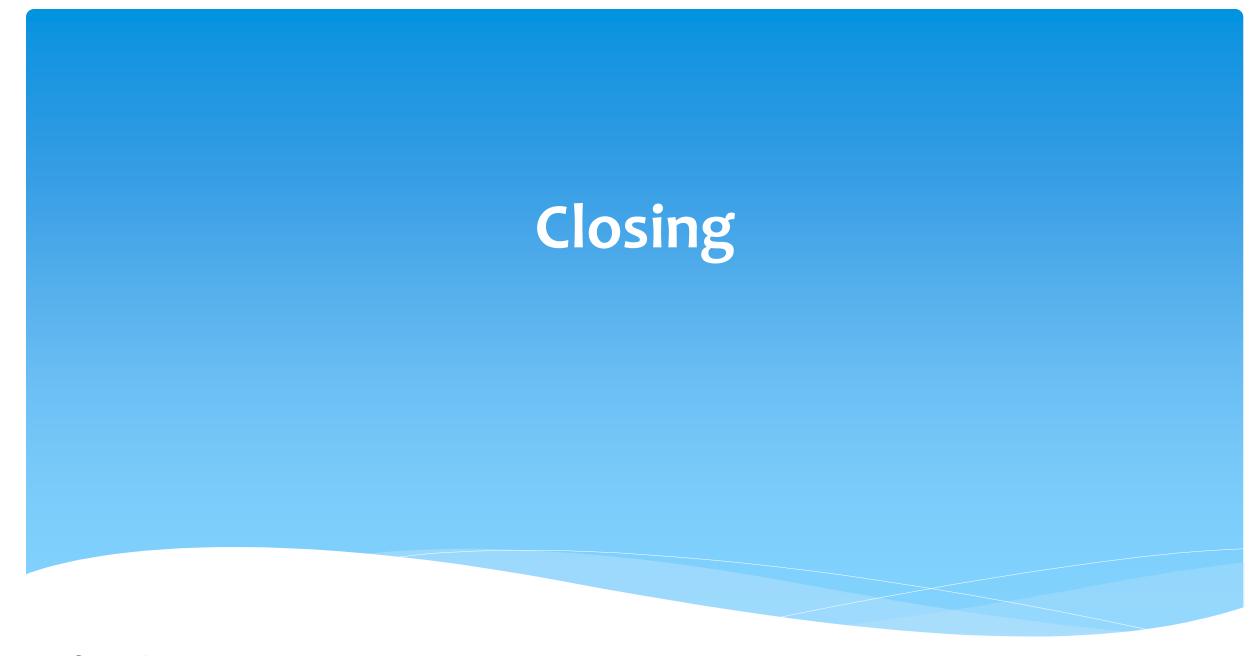


Eligibility Waivers

Eligibility Waivers Tab

- * If you have an evaluation or services that are outside of the eligibility dates, you can choose the Date Type, enter date and click "Add". You can then upload any supporting documentation.
- * You may need to use this when a child is transitioning from EI into Preschool.





Dutchess County Timeline

* February 29, 2024:

* McGuinness will migrate all of the children that are in the Dutchess County Preschool system over into eSTACs.

* March 1, 2024:

- * Dutchess County school districts can begin entering 24/25 children and STACs into eSTACs.
- * All prior year STAC's (23/24, 22/23, 21/22 etc.), send paper STAC to the county to enter or amend in their Preschool system. Prior years will not be turned on in eSTACs and you will not be able to enter any STACs.

Getting Support

- * CPSE Portal Address (you may want to bookmark): https://www.cpseportal.com
- * If you need help you can contact Kelly Knowles at Kknowles@jmcguinness.com
- * After you are familiar with the Portal, and you need help, send an email to eSTACs@CPSEPortal.com.
 - * Please include your district name, which County you work with and a description of your issue.
 - * Do **not** use child's name
 - * Use Student # or STAC ID #
- * If you would like to speak on the phone, please state so in your email along with your phone number and best times to reach you.