

# Welcome to CPSE Portal Introduction Kick-Off and Initial Setup



# What Is The CPSE Portal

# CPSE Portal

- \* The CPSE Portal is a web based system that provides a mechanism for exchanging data between the County and its providers.
- \* One component of this system is capturing electronic session notes / treatment logs for provided services, and signing them digitally.
- \* Another component of the Portal is billing the county electronically for services.
- \* Eliminating paper session notes & paper vouchers.

# Features

- \* What will functionality County vendors utilize?
  - \* Recording service providers and their credentials (NPI, license, etc.)
  - \* Entering Treatment logs for:
    - \* SEIT services,
    - \* Related Services including both fee for service as well as services provided as part an approved Center Based preschool program.
  - \* Entering attendance (Present/Absent/Closed) for children attending a Center Based preschool program.
  - \* Generating electronic bills to the county for SEIT, Related Services , Center Based Tuition, and Center Based Related Service billing.

# Three Types Of Provider Users

- \* **Agency Administrators:**

- \* These individuals work for an agency.
- \* They perform tasks as a vendor related to billing.
- \* They also perform caseload management tasks such as assigning therapist to children, assigning children to classrooms (for Center Based children).

- \* **Agency Service Providers:**

- \* These individuals work for an agency as a therapist.
- \* Their role is entering and signing session notes.

- \* **Independent Providers:**

- \* They are a service provider that performs the same tasks as an agency service provider.
- \* They are a vendor that contracts directly the county and thus also has the role of billing administrator.

# CPSE Portal Home Screen for Billing Admins.



Hello, KKnowlesBVS . You are currently logged in for **BAKER VICTORY SERVICES** (Logout)



[Home](#) [File Transfer](#) [Activities](#) [eSTACS](#) [Attendance](#) [Billing](#) [Caseload Maintenance](#) [Lookup](#) [Documents](#) [Reports](#) [Medicaid](#) [People](#) [My Account](#) [Knowledge Base](#)

## User Profile

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

[Edit User Account](#)

## News Feed

[View All Your Articles](#)

[Uploading Prescriptions \(For Billing Admins\) - New Order Screen](#)

**2/8/2023** [more](#) [dismiss](#)  
Uploading Prescriptions (For Billing Admins) - New Order Screen Knowledge Base Article

[Credential Verification Internal Server Error RESOLVED](#)

**12/8/2022** [more](#) [dismiss](#)  
The credential verification where users were getting an Internal Server Error has been resolved.


[CPSE Portal not affected by Log4j exploit](#)

**12/14/2021** [more](#) [dismiss](#)  
CPSE Portal not affected by Log4j exploit

[CPSE Portal Problems - 6/15/21](#)

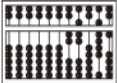
**6/15/2021** [more](#) [dismiss](#)  
CPSE Portal will be unavailable at 2:00PM 6/15/21

# CPSE Portal Home Screen for Service Providers



# PORTAL

Hello, lisaaron24 . You are currently logged in for **VERLA CLEMENT** (Logout)

**JAMES MCGUINNESS  
& ASSOCIATES INC.**  
Consultants

HomeActivitiesAttendanceCaseload MaintenanceLookupDocumentsReportsMy AccountKnowledge Base

Hide

User Profile

Username: **lisaaron24**

First Name: **Lisa**

Last Name: **Aronica**

Email: **laronica1@ecmc.edu.jmcguinness.com**

[Edit User Account](#)

Hide

My Professional Profile

Name: **VERLA CLEMENT**

NPI: **1790904472** (LISA ARONICA)

**My License(s)**

Profession	License	Original Date Of Licensure	Registered Through Date	Lookup	Verification Status	Verify
Licensed Occupational Therapist	011253	03/31/2013	01/31/2025	Lookup	REQUIRES VERIFICATION	Verify

**My signature**  
*Lisa Aronica MS OTR/L*  
Lisa Aronica MS OTR/L

[Edit My Profile](#)

News Feed

[View All Your Articles](#)

Uploading Prescriptions (For Therapists) - New Order Screen

**2/8/2023** [more](#) [dismiss](#)

Uploading Prescriptions (For Therapists) - New Order Screen Knowledge Base Article

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CPSE Portal Problems - 6/15/21

**6/15/2021** [more](#) [dismiss](#)

CPSE Portal will be unavailable at 2:00PM 6/15/21

New CPSE Portal features for 2020-2021

**7/7/2020** [more](#) [dismiss](#)

A new version of CPSE Portal arrives on 7/8

# How Do Users Get Logins

- \* This process is done by “invitations”.
- \* The County will create the initial invitation for the Independent Provider.
- \* For Agencies: the County will create the initial invitation for an administrator of that agency. That administrator will then invite additional users for their agency.
  - \* An invitation is created to invite staff for the agency.
  - \* The staff will use this invitation to create a username and password to the system.
  - \* This process will be covered at the end of the webinar.
- \* If you are already using CPSE Portal for another County, that same username will be used, and you will not receive an invite. You will automatically be linked to the County.



# Process Overview - Independent Providers

- \* County uploads list of children and their services (enrollments).
- \* Provider enters session notes / treatment logs for the enrollments.
- \* The provider digitally signs the session notes / treatment logs.
- \* Billing Provider bundles signed entries into an electronic voucher.
- \* Billing Provider digitally signs and submits electronic voucher to County.

# Process Overview – Agency SEIT / Related Service Providers

- \* County uploads list of children and their services (enrollments).
- \* Agency administrator assigns the children's services to a SEIT / therapist.
- \* The SEIT / therapist enters session notes / treatment logs for the enrollments.
- \* The SEIT / therapist digitally signs the session notes / treatment logs.
- \* Agency administrator bundles signed entries into an electronic voucher.
- \* Agency administrator digitally signs and submits electronic voucher to County.

# Process Overview – Approved 4410 Preschool Center Based Program

- \* County uploads list of Center Based children and their included related services (CB and CBRS enrollments).
- \* Agency administrator assigns children to various classrooms.
- \* Agency administrator assigns the children's included related services to therapist.
- \* An agency administrator or classroom teacher records children's classroom attendance (present / absent / closed).
- \* The therapist enters session notes / treatment logs for the CBRS enrollments.
- \* The therapist digitally signs the session notes / treatment logs.

# Process Overview – Approved 4410 Preschool Center Based Program

- \* An agency administrator or classroom teacher digitally signs a monthly attendance log for the classroom.
- \* Agency administrator creates an electronic voucher for all Center Based (CB) children.
- \* Agency administrator creates a zero dollar electronic voucher for all Center Based children's corresponding included services (CBRS).
- \* Agency administrator digitally signs and submits electronic vouchers to County.

# Training Webinars

- \* Over the next few months we will be holding training webinars on various topics.
- \* In order to maximize relevancy, the timing of the webinars will correspond to the stage of the implementation. For example, we won't be training on how to create a billing voucher in May, since that won't be used until August.
- \* Each webinar will have a different target audience such as:
  - \* Independent Provider
  - \* Agency Service Providers
  - \* Agency Administrators
  - \* Center Based Agency Administrators
  - \* ALL Staff



# **Initial Set-Up For Agency Service Providers & Independent Providers**

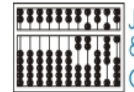


# Portal Invitations

# CPSE Portal



Hello, KKnowlesBVS . You are currently logged in for **BAKER VICTORY SERVICES** (Logout)



JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants

Home File Transfer Activities eSTACs Attendance Billing Caseload Maintenance Lookup Documents Reports Medicaid **People** My Account Knowledge Base

## User Profile

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

[Edit User Account](#)

## News Feed

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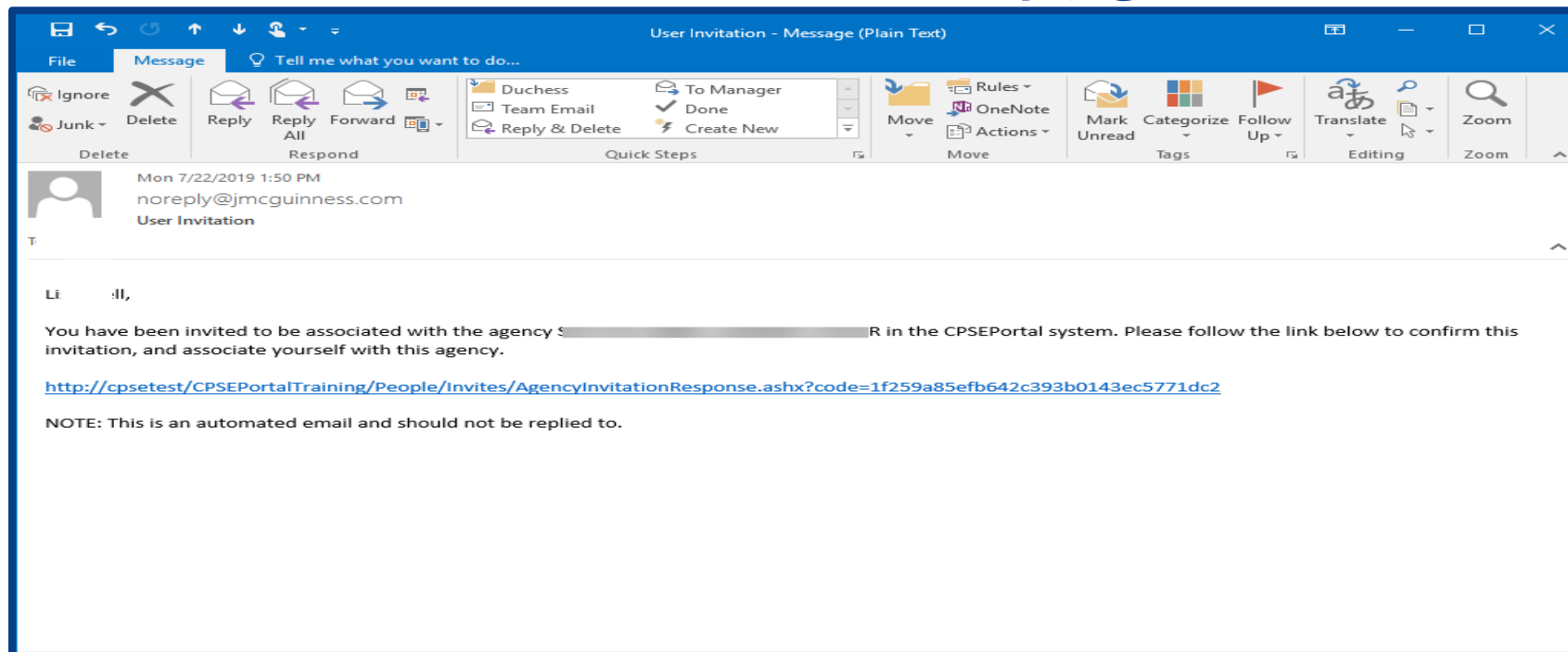


# Portal Invitations

- \* The county will send the agency an email invitation to join the Portal.
  - \* The agency is the primary link between the CPSE Portal & their service providers.
- \* Agencies will send an email invitation to their service providers to join the Portal.
  - \* The service provider will click the link in the email to set up their username & password.
  - \* The service provider will also be creating a PIN. This PIN is used for signing your electronic session notes.
- \* The county will send Independent Providers an email invitation to join the Portal.
  - \* Independent providers will click the link in the email to set up their username & password.
  - \* You will also be creating a PIN for signing your session notes and submitting vouchers to the county.
- \* When creating your log on information, make sure that your **NPI, license number, and email address** are correct. This is especially important for service providers who work for multiple agencies.

# Portal Invitations - Sample Email Invite

After the County or agency sends out the invitation, the service provider or Independent Provider will receive the following email. The provider will click the link to set up their account in the Portal. The email will come from ***noreply@CPSEPortal.com***.



# Portal Invitations – Accepting Invitation

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

The screenshot shows the 'CPSEPortal Invitation' page. At the top, there is a header with the 'CPSE PORTAL' logo, a '(Login)' link, and the 'JAMES MCGUINNESS & ASSOCIATES INC. Consultants' logo. Below the header, the page title is 'CPSEPortal Invitation'. A message states: 'You have been invited to be associated with [redacted], [redacted] 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.'

The form contains several sections with red and yellow arrows pointing to specific fields:

- Name Confirmation - Confirm this information is correct.**
  - First Name: [redacted] (red arrow)
  - Last Name: [redacted] (red arrow)
- Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.**
  - NPI: [redacted] (red arrow)
  - Profession: OT - Licensed Occupational Therapist (063) (red arrow)
  - NYS License Number: 00 [redacted] (red arrow)
  - Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP): [redacted] (yellow arrow)
- Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.**
  - Email: [redacted] (yellow arrow)
- User Account Information**
  - Username: [redacted] (yellow arrow)
  - Password: [redacted] (yellow arrow)
  - Confirm Password: [redacted] (yellow arrow)

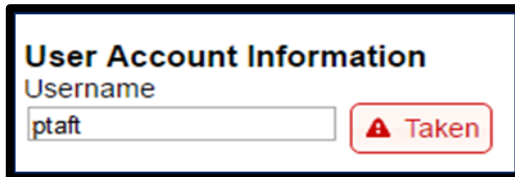
At the bottom of the form is a blue button labeled 'Accept Invitation'. The footer of the page reads '© James McGuinness & Associates'.



# Choosing Username, Password and PIN

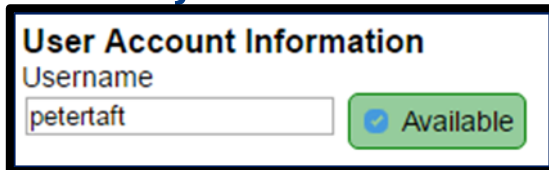
# Choosing Username and Password

- \* Choose a good username that can be remembered (name, email address, first initial & last name, etc.)
- \* If your desired username is in use by somebody else the screen will show you “Taken”:



**User Account Information**  
Username  
 ⚠ Taken

- \* Try again until you find an available one:



**User Account Information**  
Username  
 ✅ Available

- \* Choose a password that is strong but that you can remember and reenter to confirm it.

# Choosing Your PIN

- \* Go to **My Account -> My Pin**
- \* Enter your PIN number and password.
  - \* (Choose “Save PIN” for first time PIN setup or “Change PIN” for changing current PIN)
- \* <http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>



**PIN Selection**

You have not yet chosen a PIN. You will be unable to digitally sign until you do so. Please create one now.

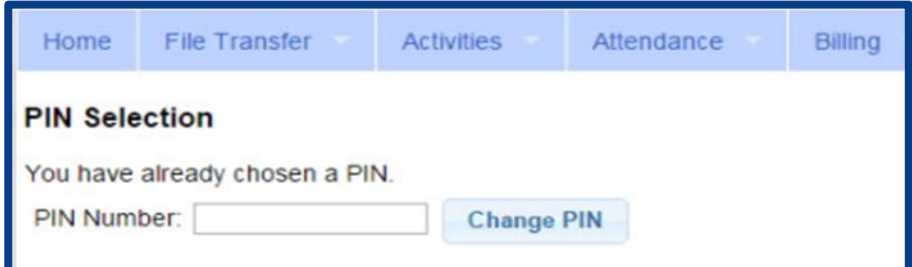
PIN Number:  1

Username:  2

Password:  3

4

This screenshot shows the 'PIN Selection' form for a user who has not yet chosen a PIN. It includes fields for PIN Number, Username, and Password, each with a red number indicating a required character. A 'Save PIN' button is also present.



Home File Transfer Activities Attendance Billing

**PIN Selection**

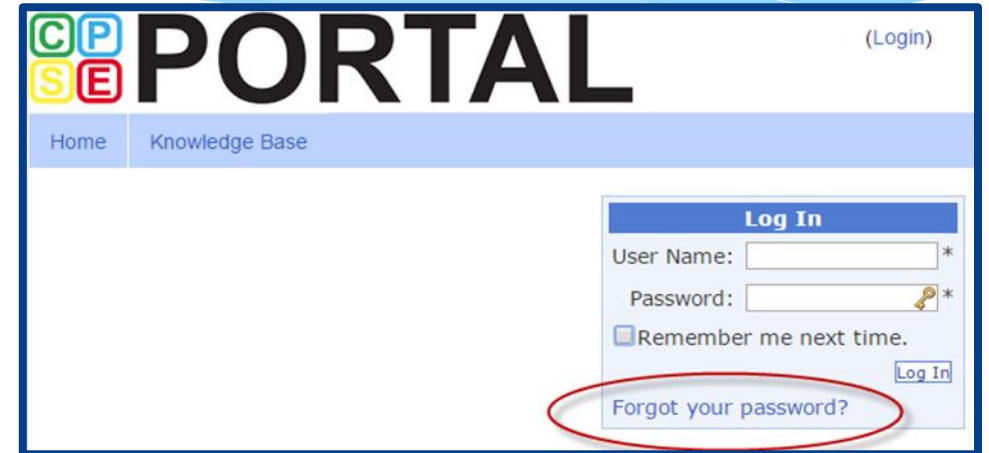
You have already chosen a PIN.

PIN Number:

This screenshot shows the 'PIN Selection' form for a user who has already chosen a PIN. It includes a 'Change PIN' button. The top navigation bar shows links for Home, File Transfer, Activities, Attendance, and Billing.

# Resetting Forgotten Passwords

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



CPSE PORTAL (Login)

Home Knowledge Base

**Log In**

User Name:  \*

Password:  \*

☐ Remember me next time.

[Forgot your password?](#)



**Password Recovery**

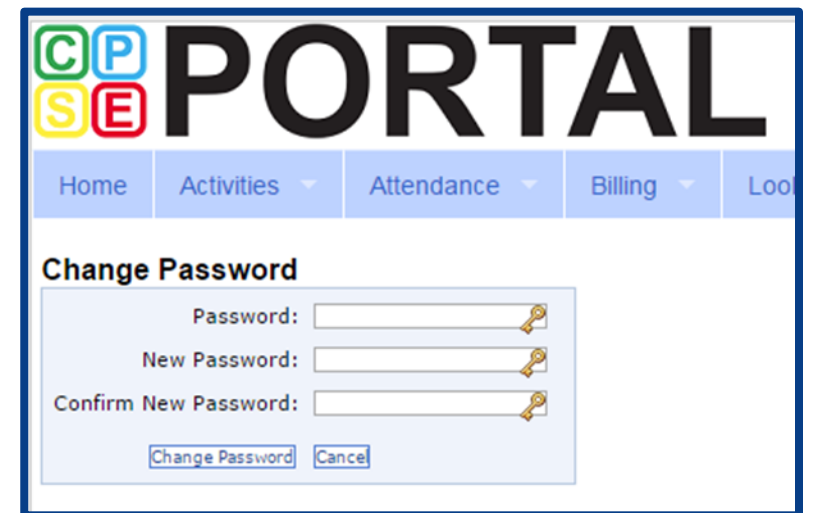
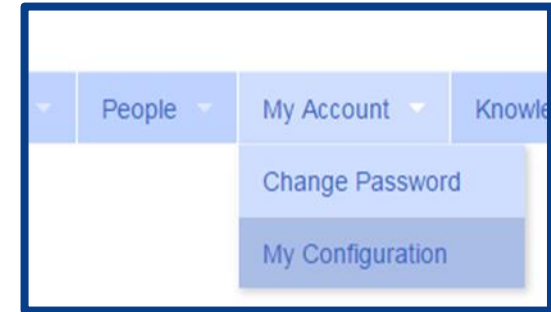
**Forgot Your Password?**

Enter your User Name to receive your password.

User Name:

# Changing Your Password

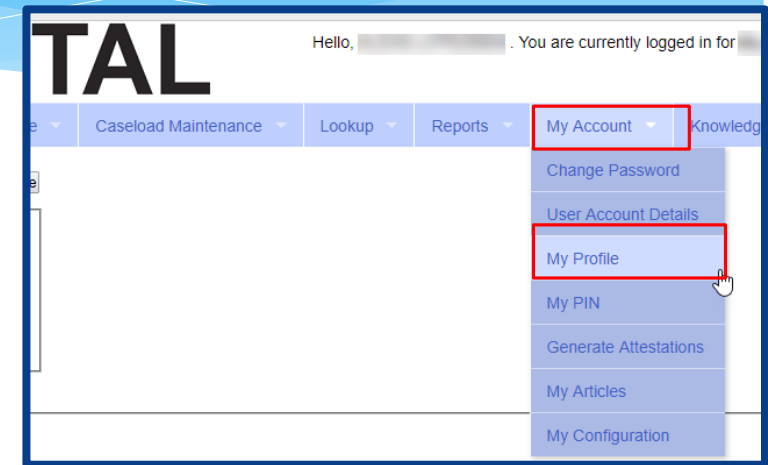
- \* Go to **My Account -> Change Password**.
- \* Enter your current password in the password field.
- \* Enter your New Password.
- \* Re-enter your New Password to confirm it was entered correctly.
- \* <http://support.cpseportal.com/kb/a14/change-password.aspx?KBSearchID=16315>

A screenshot of the 'Change Password' form on the CPSE Portal. The form has a title 'Change Password' and three input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a key icon to its right. At the bottom of the form are two buttons: 'Change Password' and 'Cancel'.



# Edit My User Information

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

A screenshot of the 'My Profile' page. The page has a header 'My Profile' and three tabs: 'Personal and Professional', 'User Information' (selected and highlighted with a red box), and 'Favorites'. Below the tabs, there is a form with the following fields: 'Username' (lisaaron24), 'Last Name' (Aronica), 'First Name' (Lisa), and 'Email' (laronica1@ecmc.edu.jmcguinne). An 'Update' button is located at the bottom of the form.

# Edit My Personal & Professional Information

- \* Go to **My Account -> My Profile** & click on the “Personal and Professional” tab.
- \* Check to ensure that your license information and your NPI # are correct.
- \* You will also make sure that you have entered a Signature & Credentials.

**My Profile**

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

Information in CPSE Database

Last Name

CLEMENT

First Name

VERLA

NPI

1790904472

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

Lisa Aronica MS OTR/L

Update

Licenses / Certifications / Professions [NYS Office of the Professions]

	Description	Credential Type	#	State	NY Profession Code	From	To	Active		
OT	Licensed Occupational Therapist	License	011253	NY	063	3/31/2013	1/31/2025	<input type="checkbox"/>	Edit	Remove

Add

Information from NPPES NPI Registry

[Click here for NPPES website](#)

NPI 1790904472

This NPI is for an Individual

First Name

LISA

Last Name

ARONICA

Credentials

OT

Mailing Address 1

1930 E SOUTHERN AVE

Mailing Address 2

City

TEMPE

State

AZ

Zip

852827518

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	225X00000X	Respiratory, Developmental, Rehabilitative and Restorative Service Providers	Occupational Therapist		AZ	2004



**Independent Providers ONLY**

# Billing Provider Profile – Independent Providers **ONLY**

- \* Independent Providers **ONLY** will need to create a Billing Provider Profile in order to bill the county.
- \* Go to ***My Account -> Billing Provider Profile***



# Billing Provider Profile – Independent Providers ONLY

All information entered on this screen will **ONLY** be the Independent Providers information.

## Billing Provider Profile

Provider Info Vendor Numbers User Information

### Billing Provider

Name SMITH, CAROL

### Billing Address

Address 1 123 Main Street

Address 2

City Schenectady

State NY

Zip 12305

Phone Number 518-111-1111

Tax ID

Update

Information from NPPES NPI Registry

[Click here for NPPES website](#)

NPI 1285775486

This NPI is for an Individual

First Name CAROL

Last Name

Credentials MSCCC SLP

Mailing Address 1

Mailing Address 2

City

State NY

Zip

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	235Z00000X	Speech, Language and Hearing Service Providers	Speech-Language Pathologist		NY	



# Initial Set-Up For Agencies



# Portal Invitations

# Portal Invitation Process for Agency

- \* The County will send the agency an email invitation to join the Portal.
- \* An agency will get **one** invitation, and then they can invite staff as appropriate.
- \* Recipient will click the link in the email to setup their username, password and PIN.
- \* Ensure NPI/BEDS code are correct.
- \* Billing admins will need to create a PIN for submitting vouchers to the county.
- \* If you already use the Portal, the county will link your current logon to their county.





# **Portal Invitations – Single Service Provider Invite**

# Portal Invitations – Single Service Provider Invite

Agencies will send an invitation to a Service Provider. A service provider is a person who is an individual who provides services to the child.

To send an invitation, go to **People -> Invitations**.

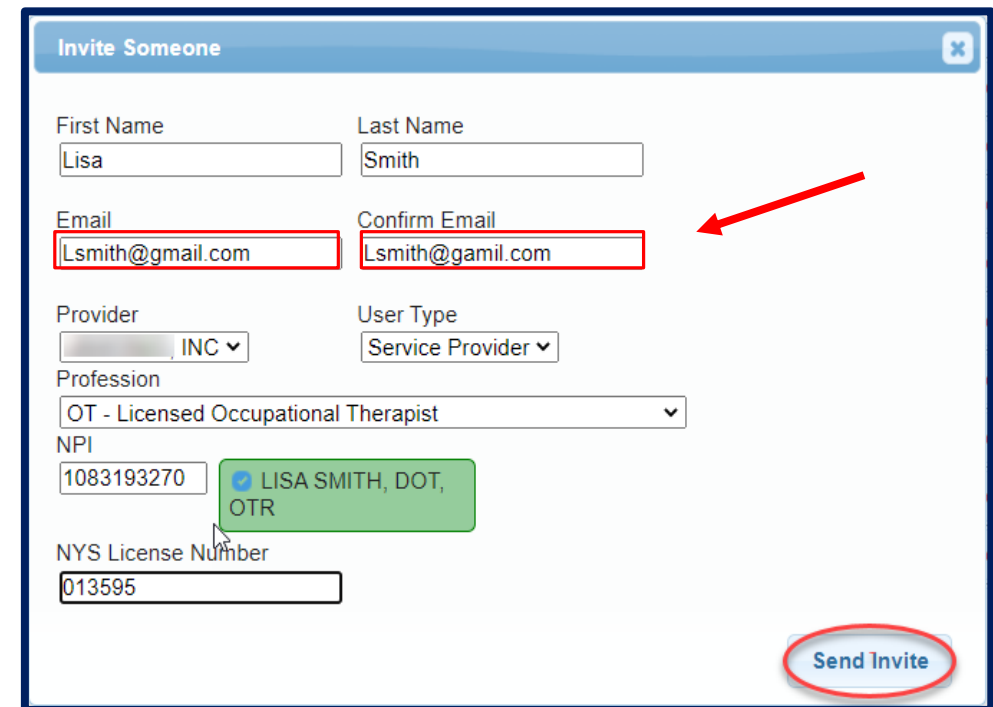
The screenshot displays the CPSE PORTAL interface. At the top, the logo 'CPSE PORTAL' is visible on the left, and the user greeting 'Hello, KKnowlesBVS . You are currently logged in for BAKER VICTORY SERVICES (Logout)' is in the center. On the right, there is a logo for 'JAMES MCGUINNESS & ASSOCIATES INC. Consultants'. Below the header is a navigation bar with various menu items: Home, File Transfer, Activities, eSTACs, Attendance, Billing, Caseload Maintenance, Lookup, Documents, Reports, Medicaid, People, My Account, and Knowledge Base. The 'People' menu item is highlighted with a red box. A dropdown menu is open from 'People', showing a list of options: Credential Approval Listing, Potential Verification Problems, Provider Specific Identifiers, Service Provider Listing For School Year, Service Provider Credential Listing, Service Providers With Multiple Licenses, Service Providers With License Issues, Service Provider Credential Verification Listing, Users, People, and Invitations. The 'Invitations' option at the bottom of the dropdown is also highlighted with a red box and has a mouse cursor pointing at it. On the left side of the page, there is a 'User Profile' section with a 'Hide' button. The profile information includes: Username: KKnowlesBVS, First Name: Kelly, Last Name: Knowles, and Email: kknowles@jmcguinness.com. There is also a link to 'Edit User Account'.

# Portal Invitations – Single Service Provider Invite

After you click Invitations, the following screen appears. Fill in all of the service providers information.

Note that the service providers name & credentials will appear next to their NPI #. Make sure that the service providers email address, NPI & License # is correct before clicking “**Send Invite.**”

This is especially important when a service provider works for multiple agencies.

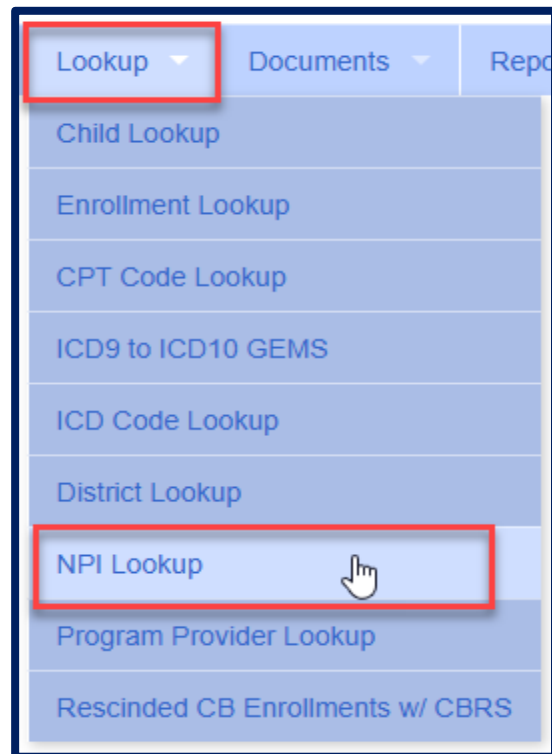


The screenshot shows a web form titled "Invite Someone" with a close button (X) in the top right corner. The form contains the following fields and elements:

- First Name:** Text input with "Lisa".
- Last Name:** Text input with "Smith".
- Email:** Text input with "Lsmith@gmail.com", highlighted with a red rectangle.
- Confirm Email:** Text input with "Lsmith@gamil.com", highlighted with a red rectangle. A red arrow points to this field from the right.
- Provider:** Dropdown menu showing "INC".
- User Type:** Dropdown menu showing "Service Provider".
- Profession:** Dropdown menu showing "OT - Licensed Occupational Therapist".
- NPI:** Text input with "1083193270". To its right is a green button with a blue checkmark and the text "LISA SMITH, DOT, OTR".
- NYS License Number:** Text input with "013595".
- Send Invite:** A blue button in the bottom right corner, circled in red.

# NPI Lookup

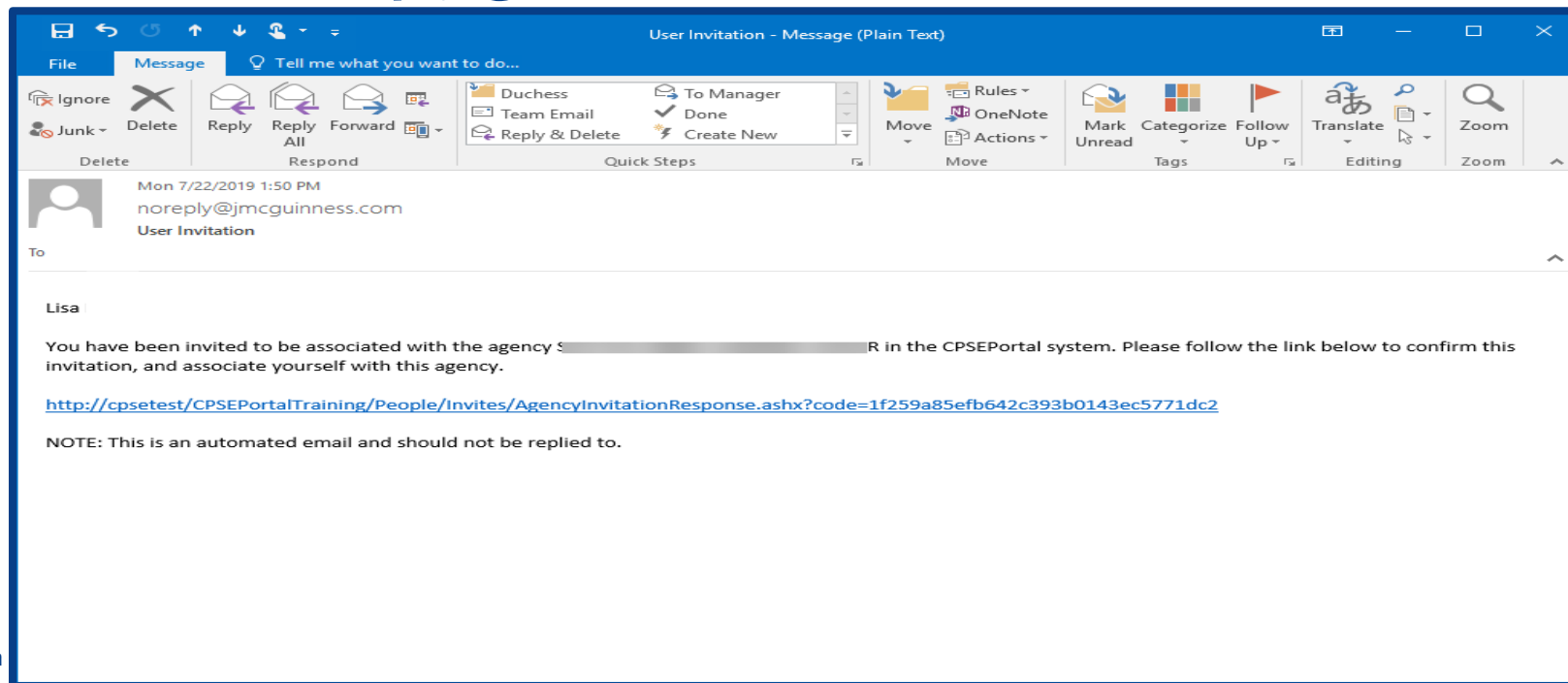
If you need to invite a service provider and do not know their NPI #, you can search for them using the NPI Lookup feature on the Lookup Menu. Go to **Lookup -> NPI Lookup**.



A screenshot of the 'NPI Lookup' form within the CPSE Portal. The form is titled 'NPI Lookup' and contains several input fields for searching: NPI, EIN, Organization Name, Other Organization Name, Last Name, First Name, Other Last Name, Other First Name, and License Number. A 'Search' button is located at the bottom right of the form. The portal's header includes the CPSE logo, the word 'PORTAL', and a user greeting. The footer shows the copyright notice '© James McGuinness'.

# Portal Invitations – Single Service Provider Invite Sample Email

After the agency sends out the invitation, the service provider will receive the following email. The service provider will click the link to set up their account in the Portal. The email will come from ***noreply@CPSEPortal.com***.



# Portal Invitations – Single Provider Invite

## Accepting Invitation

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

The screenshot shows the 'CPSEPortal Invitation' page. At the top, there is a header with the 'CPSE PORTAL' logo, a '(Login)' link, and the 'JAMES MCGUINNESS & ASSOCIATES INC. Consultants' logo. Below the header, the page title is 'CPSEPortal Invitation'. A message states: 'You have been invited to be associated with [redacted], NYS 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.'

The form contains several sections with red and yellow arrows pointing to specific fields:

- Name Confirmation - Confirm this information is correct.**
  - First Name: [redacted] (red arrow)
  - Last Name: [redacted] (red arrow)
- Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.**
  - NPI: 12[redacted] (red arrow)
  - Profession: OT - Licensed Occupational Therapist (063) (red arrow)
  - NYS License Number: 00[redacted] (red arrow)
  - Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP): [redacted] (yellow arrow)
- Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.**
  - Email: [redacted] (yellow arrow)
- User Account Information**
  - Username: [redacted] (yellow arrow)
  - Password: [redacted] (yellow arrow)
  - Confirm Password: [redacted] (yellow arrow)

At the bottom of the form is a blue button labeled 'Accept Invitation'. The footer of the page reads '© James McGuinness & Associates'.



# **Portal Invitations – Invite Multiple Service Providers**

# Portal Invitations – Invite Multiple Users

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

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

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



# Portal Profession Codes

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

The list of profession codes that can be used:

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

# Invitations – Multiple User Template

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



# Invitations – Multiple User Template

You will then choose ***Import Invitation Batch File.***

**Manage Invitations**  
User Type (All) ▾ Show Only Pending ☐ Search  

No invitations found.

Invite Someone Import Invitation Batch File



# Invitations – Multiple User Template Upload Template



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

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

People ▾ My Account ▾ Knowledge Base

## Agency Invitation Batch Import

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

Choose File No file chosen  Upload 

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# Invitations – Multiple User Template

## Preview Invitations

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

**Agency Invitation Batch Import**

Invites Preview - Accept or Decline?

Invalid Invites - Will NOT be imported

First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	Name in NPI Registry	NY License Number	Invalid Reason
Barb	Jones	bj@cpseportal.com	N	SPED				"NPI" must be valid

Valid Invites - Will be imported & sent

First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	Name in NPI Registry	NY License Number
BROOKE	DEMNER	bd@cpseportal.com	N	OT	1003003567	MS. BROOKE DEMNER, OTR	123456
Christina	LOEWENSTEIN	cl@cpseportal.com	N	OT	1003004102	LAURIE CHRISTINA LOEWENSTEIN, OTR	556677
Jen	Owen-Jones	jo@cpseportal.com	N	OT	1003011255	JENNIFER JEAN OWEN, OTR	888222
NEREIDA	Wright	nw@CPSEportal.com	N	SLP	1003001595	DR. NEREIDA IRENE HILLYER-WRIGHT, PH.D.	554433

Accept & Send Invites Decline & Cancel



# **Portal Invitations – Office Users**

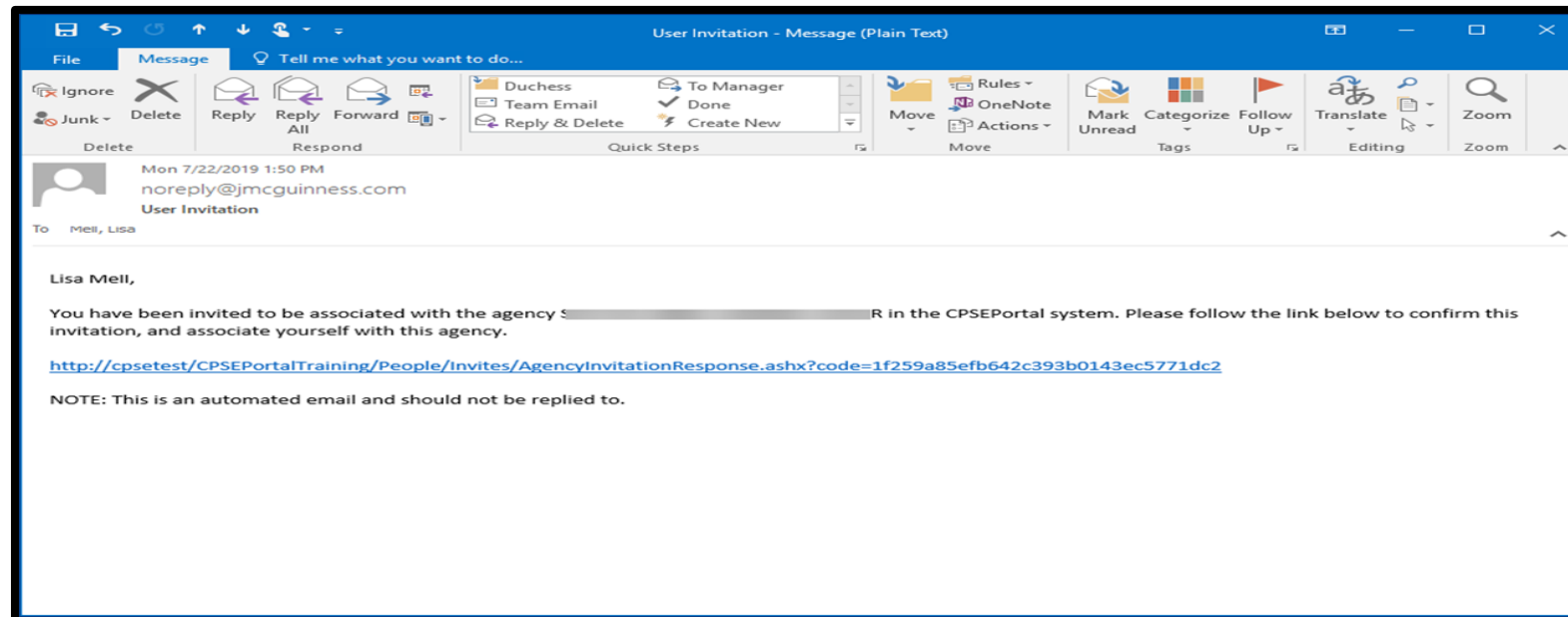
# Portal Invitation – Office User

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

A screenshot of the 'Invite Someone' form. The form has a title bar with 'Invite Someone' and a close button. It contains several input fields: 'First Name' (filled with 'Ellen'), 'Last Name' (filled with 'Famey'), 'Email' (filled with 'efamey@jmcguinness.com'), and 'Confirm Email' (filled with 'efamey@jmcguinness.com'). There is a 'Provider' dropdown menu and a 'User Type' dropdown menu (set to 'Office'). Below these is a checkbox labeled 'Allow user to submit vouchers to county' which is checked. A red arrow points from the checkbox to the 'Send Invite' button. The 'Send Invite' button is located at the bottom right of the form.

# Portal Invitation – Office User

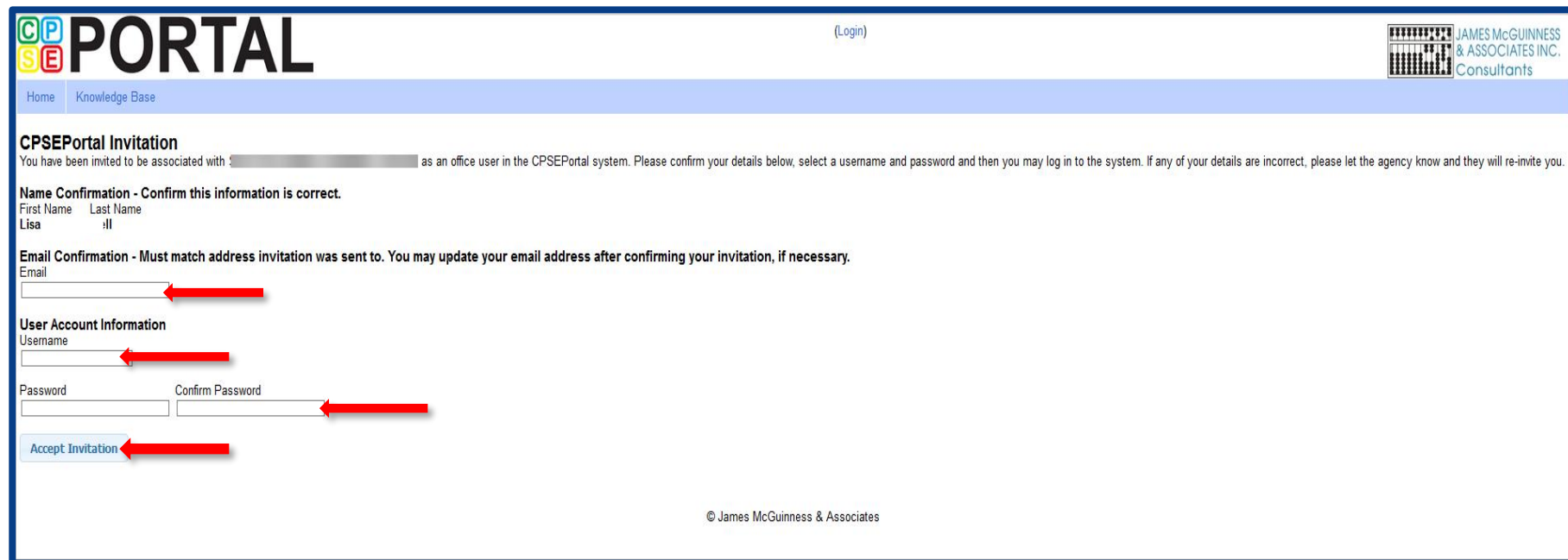
After the agency sends out the invitation, the office user will receive the following email. The office user will click the link, to set up their account in the Portal. The email will come from ***noreply@CPSEPortal.com***.





# Portal Invitation – Office User

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



The screenshot shows the CPSEPortal Invitation page. At the top left is the CPSEPORTAL logo. At the top right is the (Login) link and the James McGuinness & Associates Inc. Consultants logo. Below the navigation bar, the page title is "CPSEPortal Invitation". The main text reads: "You have been invited to be associated with [redacted] as an office user in the CPSEPortal system. Please confirm your details below, select a username and password and then you may log in to the system. If any of your details are incorrect, please let the agency know and they will re-invite you." The form contains several sections: "Name Confirmation - Confirm this information is correct." with fields for First Name (Lisa) and Last Name (H); "Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary." with an Email field; "User Account Information" with fields for Username, Password, and Confirm Password. Red arrows point to the Email, Username, Password, Confirm Password, and the "Accept Invitation" button. The footer includes "Support@CPSEPortal.com" on the left and "© James McGuinness & Associates" on the right.

CPSEPORTAL (Login) JAMES MCGUINNESS & ASSOCIATES INC. Consultants

Home Knowledge Base

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

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

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

**User Account Information**  
Username  
[redacted]  
Password Confirm Password  
[redacted] [redacted]

**Accept Invitation** [redacted]

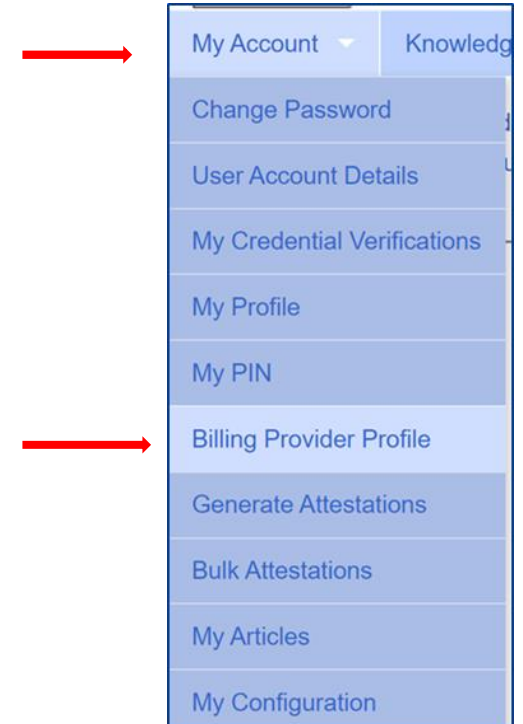
Support@CPSEPortal.com © James McGuinness & Associates



# Agency Billing Provider Profile

# Agency Billing Provider Profile

- \* Agencies will need to create a Billing Provider Profile.
  - \* This is the name & address of the agency only. Do not enter the name of the billing admin.
- \* Go to ***My Account -> Billing Provider Profile***



# Agency Billing Provider Profile

All information entered on this screen will be the **agencies information only**. The NPI information should be for an organization.

**Billing Provider Profile**


Provider Info

User Information

**Billing Provider**  
Name

**Billing Address**  
Address 1   
Address 2   
City  State  Zip   
Phone Number

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

NPI  This NPI is for an  

Organization Name

Mailing Address 1   
Mailing Address 2   
City  State  Zip

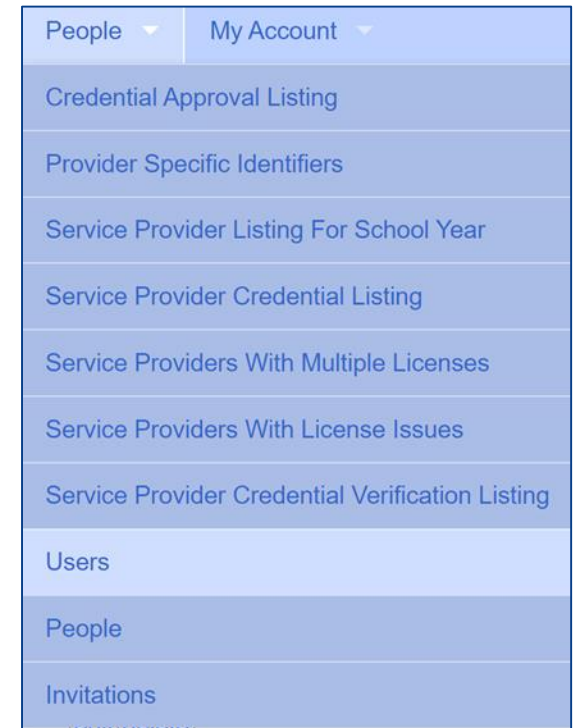
Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	252Y00000X	Agencies	Early Intervention Provider Agency			



# Portal User Access

# Portal Admin- User Access

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



# Portal Admin- User Access

## Viewing/changing Existing Users

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

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

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



# News Feed

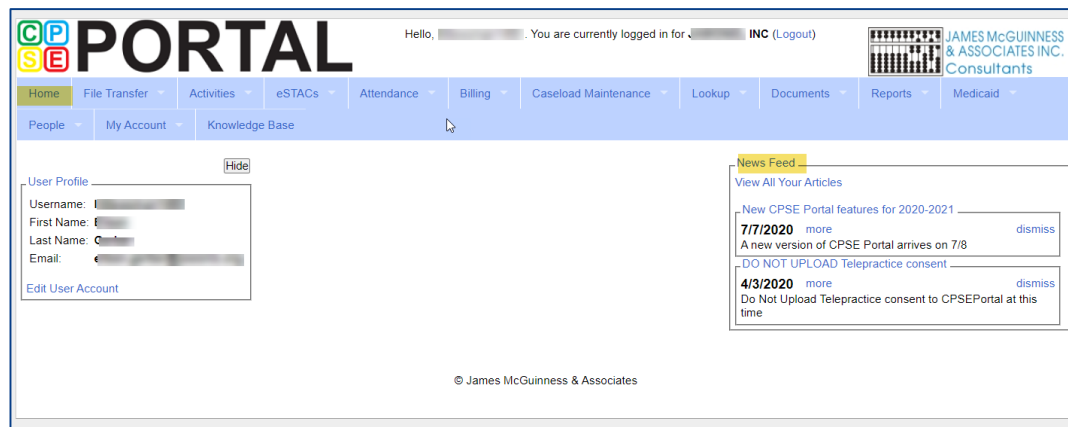


# News Feed / My Articles

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

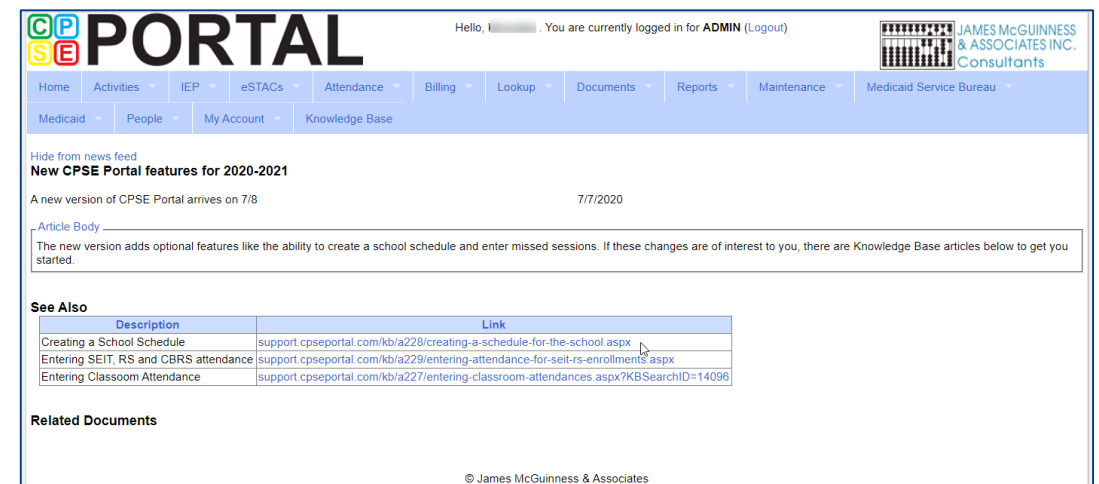
Your current News Feed will be located on your Home Page

For all News Feed articles:  
***My Account -> My Articles -> View***



The screenshot shows the CPSE Portal Home Page. The top navigation bar includes links for Home, File Transfer, Activities, eSTACs, Attendance, Billing, Caseload Maintenance, Lookup, Documents, Reports, and Medicaid. Below this, there's a section for "User Profile" with fields for Username, First Name, Last Name, and Email. To the right, the "News Feed" section is visible, showing a list of articles. The first article is titled "New CPSE Portal features for 2020-2021" and is dated 7/7/2020. The second article is titled "DO NOT UPLOAD Telepractice consent" and is dated 4/3/2020. The footer of the page reads "© James McGuinness & Associates".

Support@CPSEPortal.com



The screenshot shows the CPSE Portal My Account page. The top navigation bar includes links for Home, Activities, IEP, eSTACs, Attendance, Billing, Lookup, Documents, Reports, Maintenance, and Medicaid Service Bureau. Below this, there's a section for "My Account" with links for People, My Account, and Knowledge Base. The "News Feed" section is visible, showing a list of articles. The first article is titled "New CPSE Portal features for 2020-2021" and is dated 7/7/2020. The second article is titled "DO NOT UPLOAD Telepractice consent" and is dated 4/3/2020. Below the News Feed, there's a "See Also" section with a table of links. The footer of the page reads "© James McGuinness & Associates".

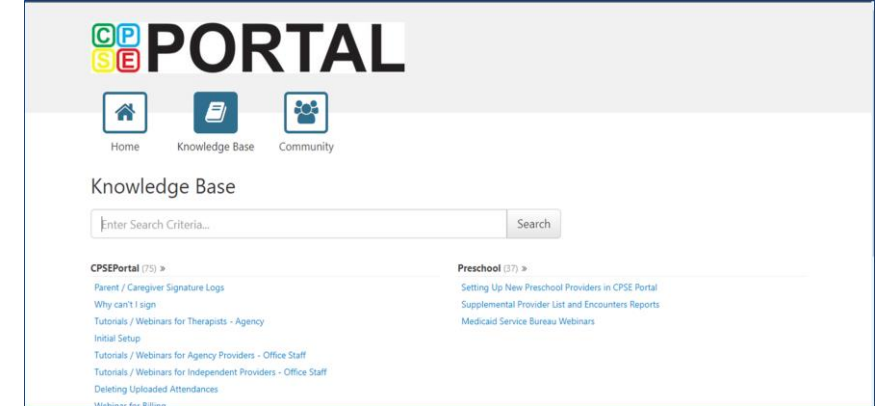
Description	Link
Creating a School Schedule	<a href="support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx">support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx</a>
Entering SEIT, RS and CBRS attendance	<a href="support.cpseportal.com/kb/a229/entering-attendance-for-seit-rs-enrollments.aspx">support.cpseportal.com/kb/a229/enter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



# Closing

# Portal Training – Knowledge Base

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



# Upcoming Webinars

## CPSE Portal Credential Verification:

**(ALL Agency Staff, Agency Service Providers & Independent Providers)**

- \* Monday, May 12, 2025 @ 9:30AM - <https://attendee.gotowebinar.com/register/8209886642085468766>
- \* Monday, May 12, 2025 @ 4:00PM - <https://attendee.gotowebinar.com/register/7055165236943963482>

## Topics Covered During This Webinar:

- What is credential verification?
- Why do we need credential verification?
- Whose credentials need to be verified?
- Who should complete the verification process?
- Verifying your License.
- Name changes for the NYS Office of Professions.
- Verifying your NPI #.
- Name Changes for NPPES.

# Knowledge Base Links

- \* Template to Import Multiple Therapists & Portal Profession Codes:  
<http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175>
- \* Forgot Your Password:  
<http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316>
- \* Choosing A PIN:  
<http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>
- \* Edit My User Information:  
<http://support.cpseportal.com/kb/a59/edit-my-user-information.aspx?KBSearchID=16250>

# Closing remarks

- \* The Portal is a helpful tool for both the County and their preschool providers.
- \* CPSE Portal Address (you may want to bookmark):  
<https://www.cpseportal.com>
- \* In addition to the Portal Knowledge base, our Help Desk is available through email at [support@CPSEPortal.com](mailto:support@CPSEPortal.com)