JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

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

Herkimer County Timeline

* **June 13, 2025:**
  * Herkimer County will **no longer accept any 25/26 STAC's**. You will however continue to send your 24/25 paper STAC's to the county.

* **June 18, 2025:**
  * McGuinness will migrate all of the children that are in the Herkimer County Preschool system over into eSTACs. Each district will only be able to see their own children. McGuinness will also bring over any 25/26 services that have already been entered into Preschool, and any Medicaid Consents that the county has received.

* **June 19, 2025:**
  * School districts will begin entering STAC's into eSTACs.

* **All prior year STAC-1's** (24/25, 23/24, 22/23 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 _____

CPSE Chairperson _____

I authorize of the following individuals to use a digital signature to submit electronic STAC records the eSTACs system on behalf of our district.

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

Please fax the completed form to (518) 393-9938 attention eSTACs.

_____
Signature Date

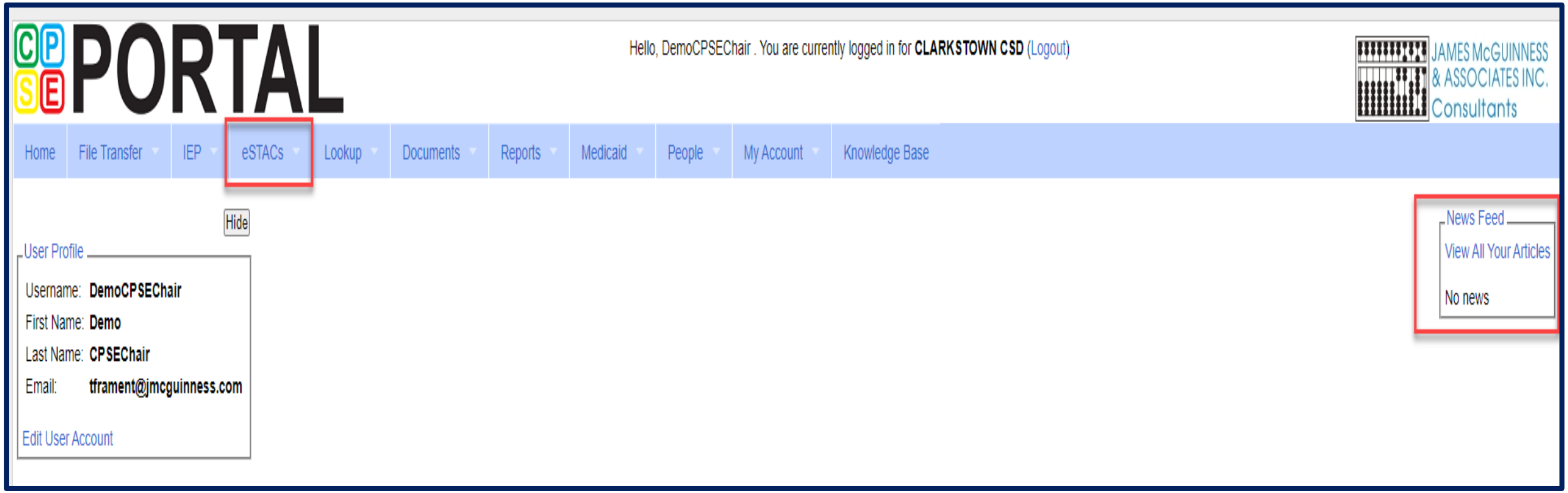
School Districts Who Are Also Providing Preschool Services

* If you are a district who also provides services to Preschool students, you will have two logins for the Portal.
  * One login will be your district login. Under your district username you will have access to eSTACs.
  * The second login will be your provider login. Under your provider username login you will have access to all students assigned to your district, billing etc.
    * This will be discussed in the CPSE Portal trainings.

Getting Started

Home Page of Portal

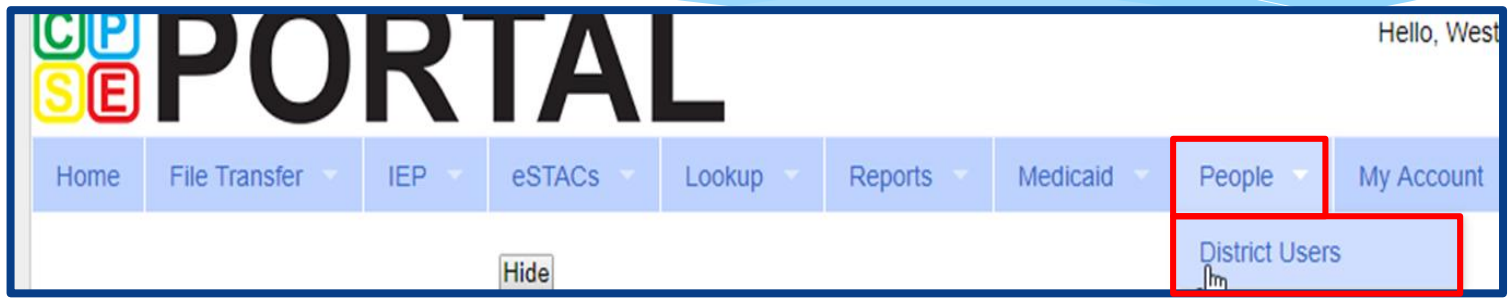
* You will be using the eSTACs tab on your home page.
  * You will also use the My Account & People tabs.
* You will also see News Feed articles on the right side of your home page.



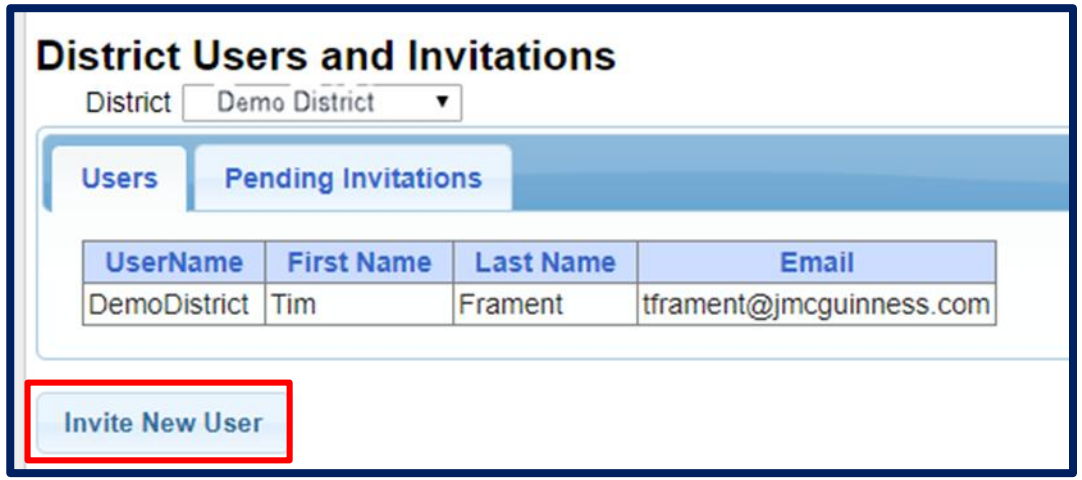
Getting Started

* Each district staff member 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*".

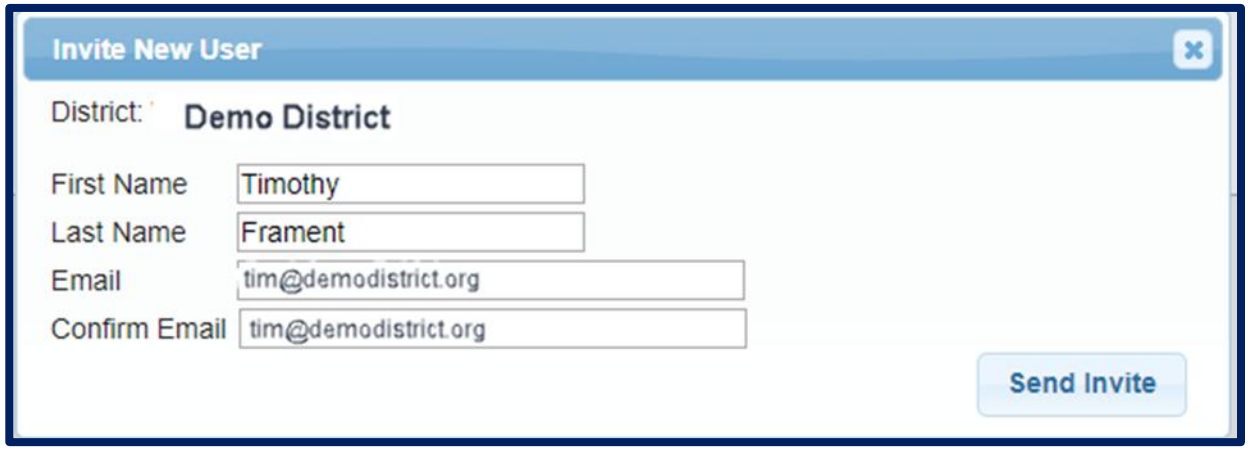


Inviting New Users

* 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.

* The email will come from noreply@jmcguinness.com.



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**.
  * Check your spam or junk mail if you do not receive the email.

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 CPSEPortal system. Please follow the link below to confirm this invitation, and associate yourself with this district.

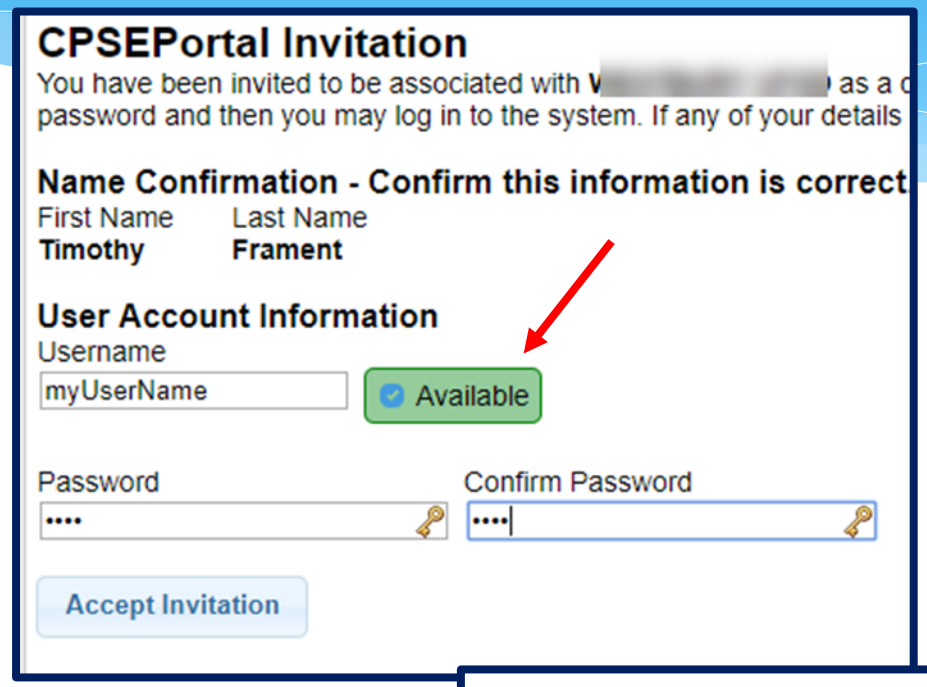
http://localhost/CPSEPortal/People/Invites/DistrictInvitationResponse.ashx?code=db7d8f7ab79a4ddebd037d9c855e36fc

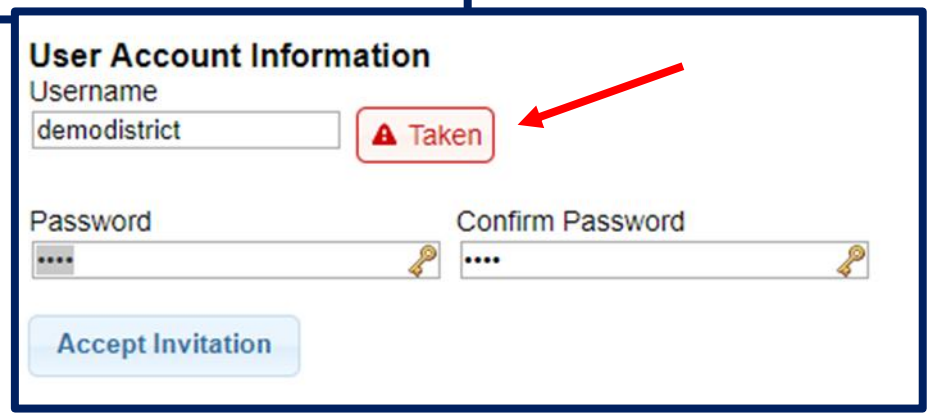
NOTE: This is an automated email and should not be replied to.

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.

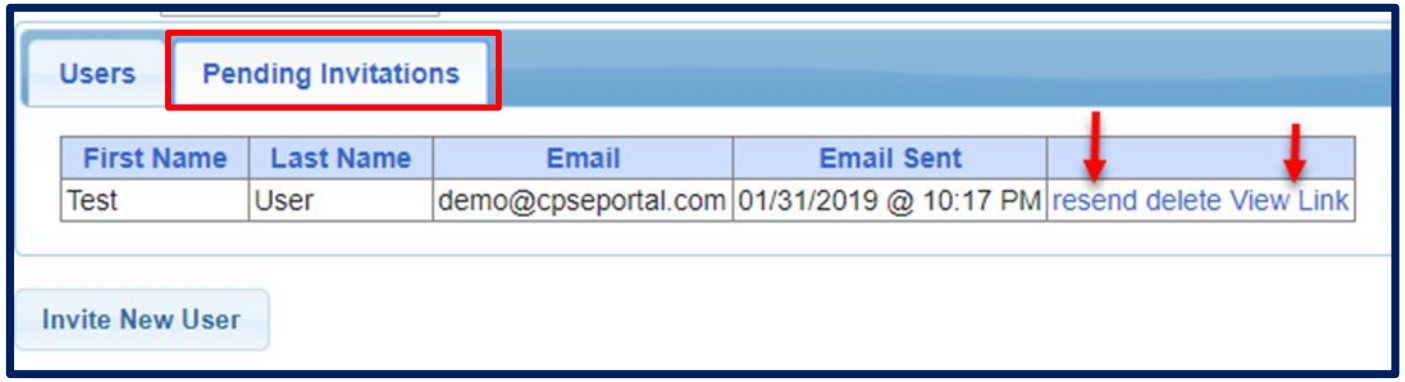


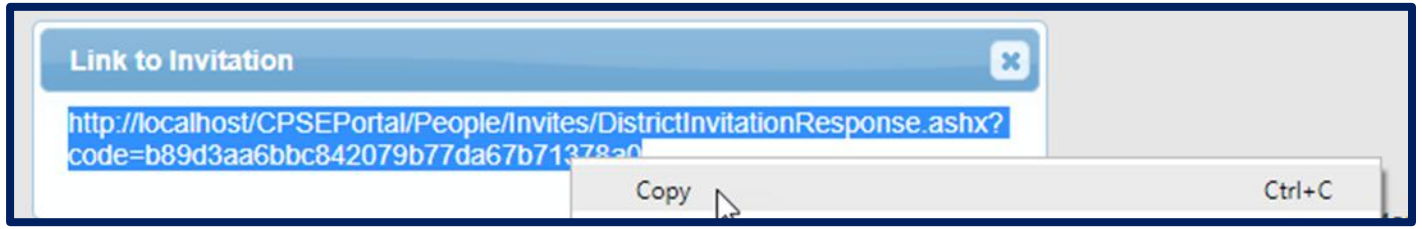


Invitation Issues – User did not receive an email

* 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 under your email address



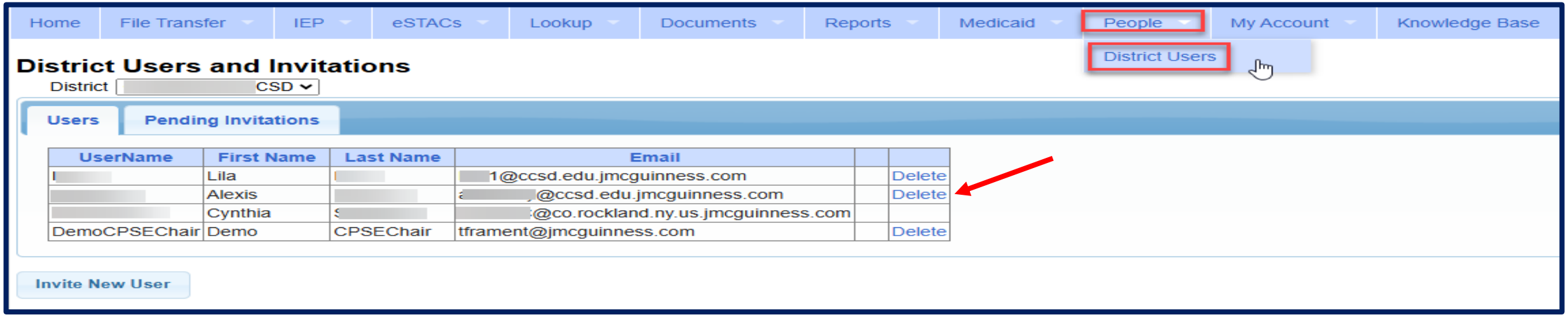


Deleting District Users

* If a staff member leaves their position, a district user can delete them from the Portal.

* Go to ***People -> District Users***

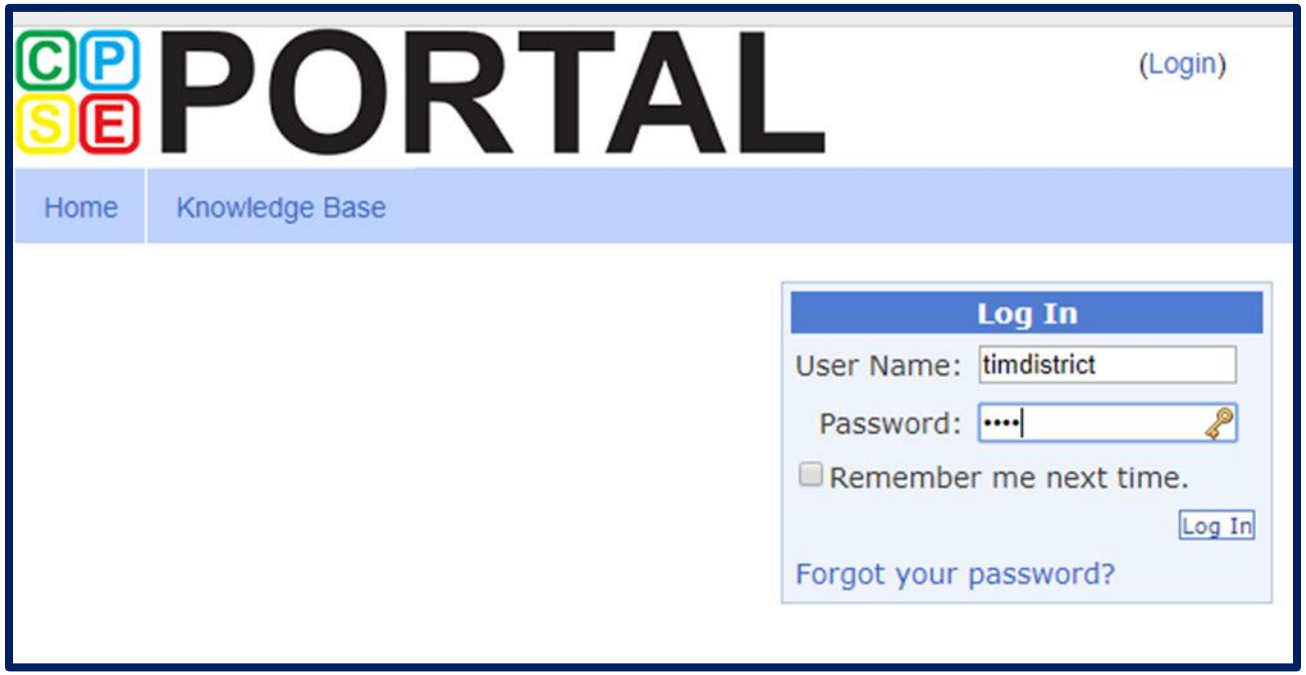
* Select the "*Delete*" option next to the staff members name.



Logging In

* Use your browser to navigate to ***https://www.cpseportal.com***

* Enter your User Name and password.

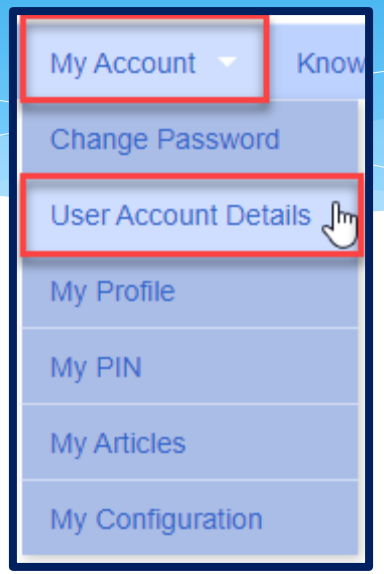


User Profile

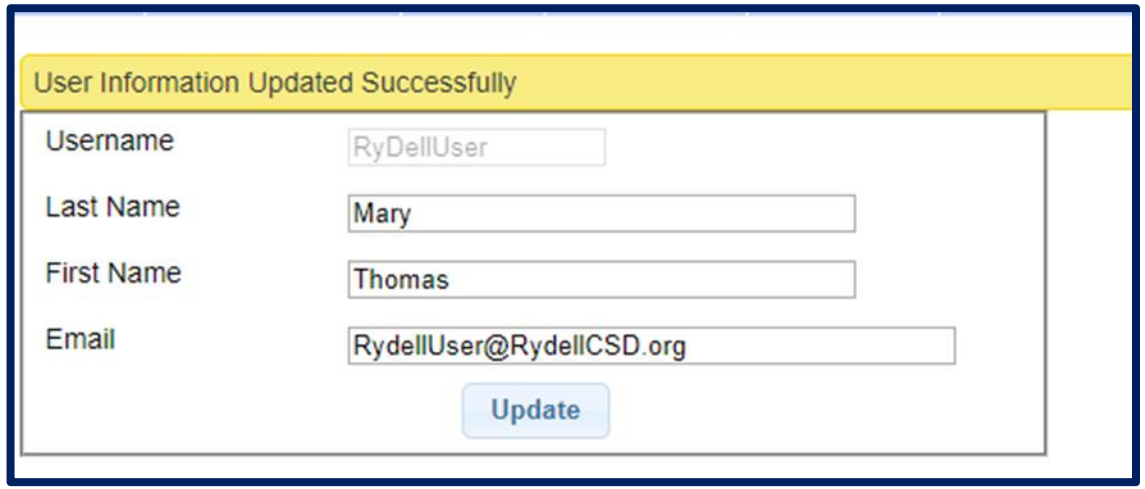
* The user's account should have that individuals first and last name associated with the account.

* 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.

Step 1 – First & Last Name

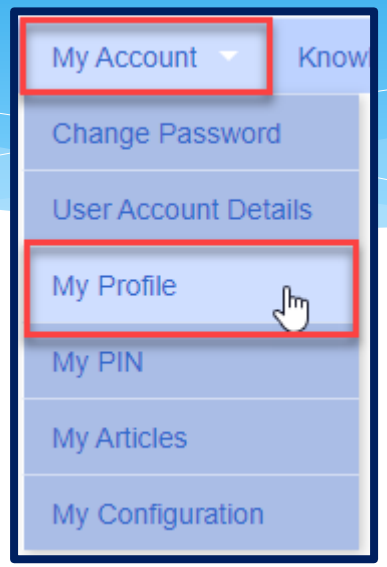


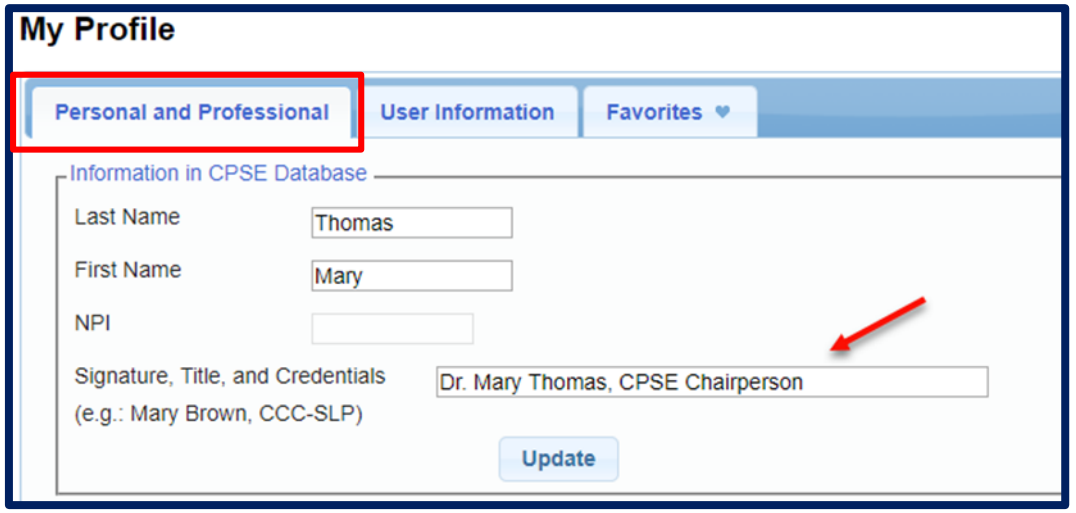
* Go to ***My Account -> User Account Details***
* Use the User Account Details page to enter / edit your Last name and First name for your account.
* Click "*Update*" to save the changes



Step 2 - Digital 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.

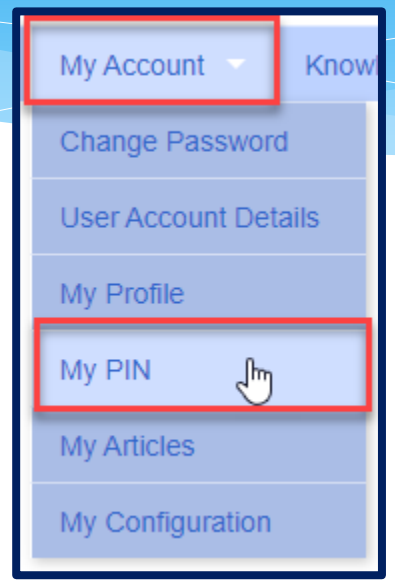




Step 3 – Creating Your Pin for Digital Signatures

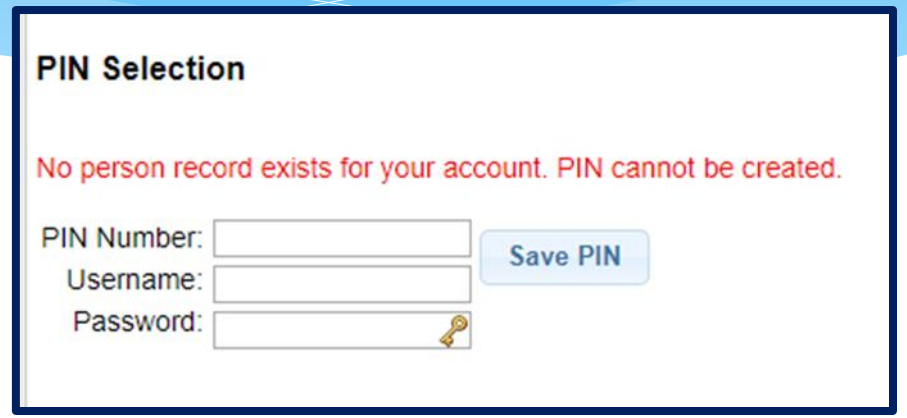
* Go to ***My Account -> My PIN***

* 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*".

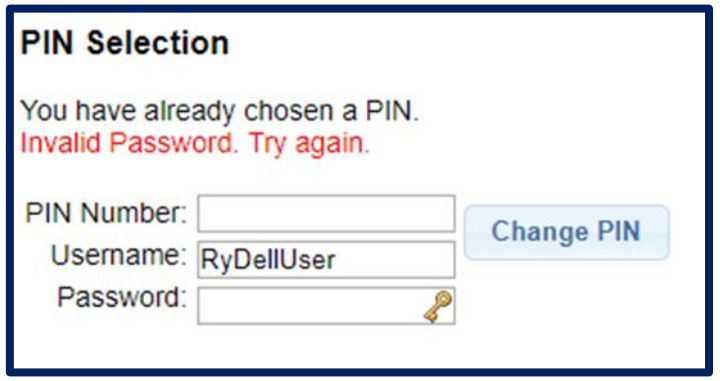


Digital Signature – Creating PIN Problems

* 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.



* The message "**Invalid Password. Try Again**" indicates that what you are entering into "Password" field is not the correct password that you use to log into CPSE Portal. Make sure that you are not entering your PIN a second time in the Password field.

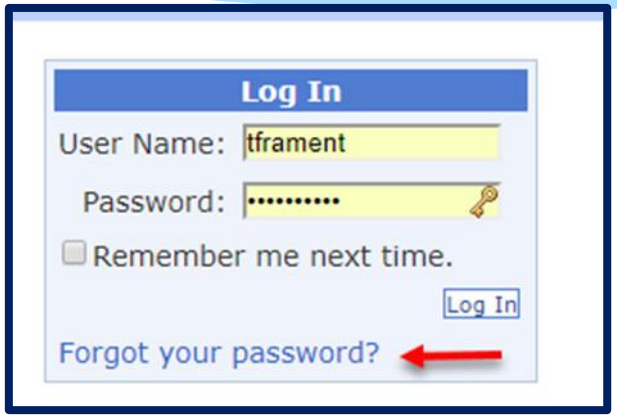


Forgotten Passwords

* User can click "***Forgot your password?***" on login screen.

* Enter your username and click "*Submit*".

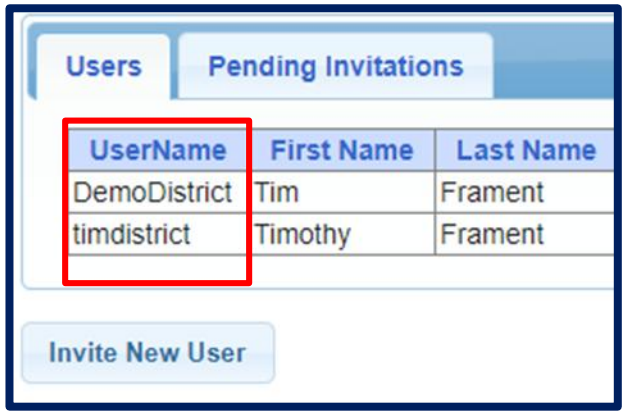
* An email with a new password will be sent to your email address.



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.

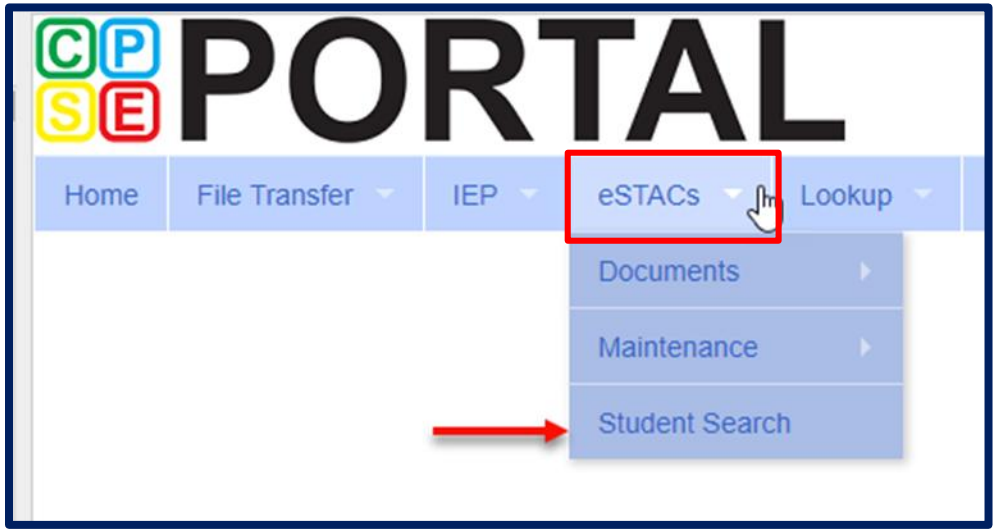
* Go to ***People -> District Users***



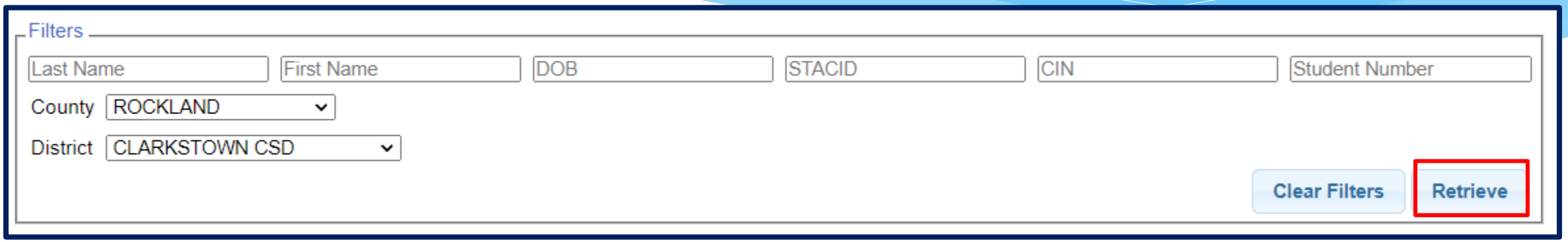
eSTACs Entering Children

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

Filters

Last Name | First Name | DOB | STACID | CIN | Student Number

County WESTCHESTER

District RYDELL CSD

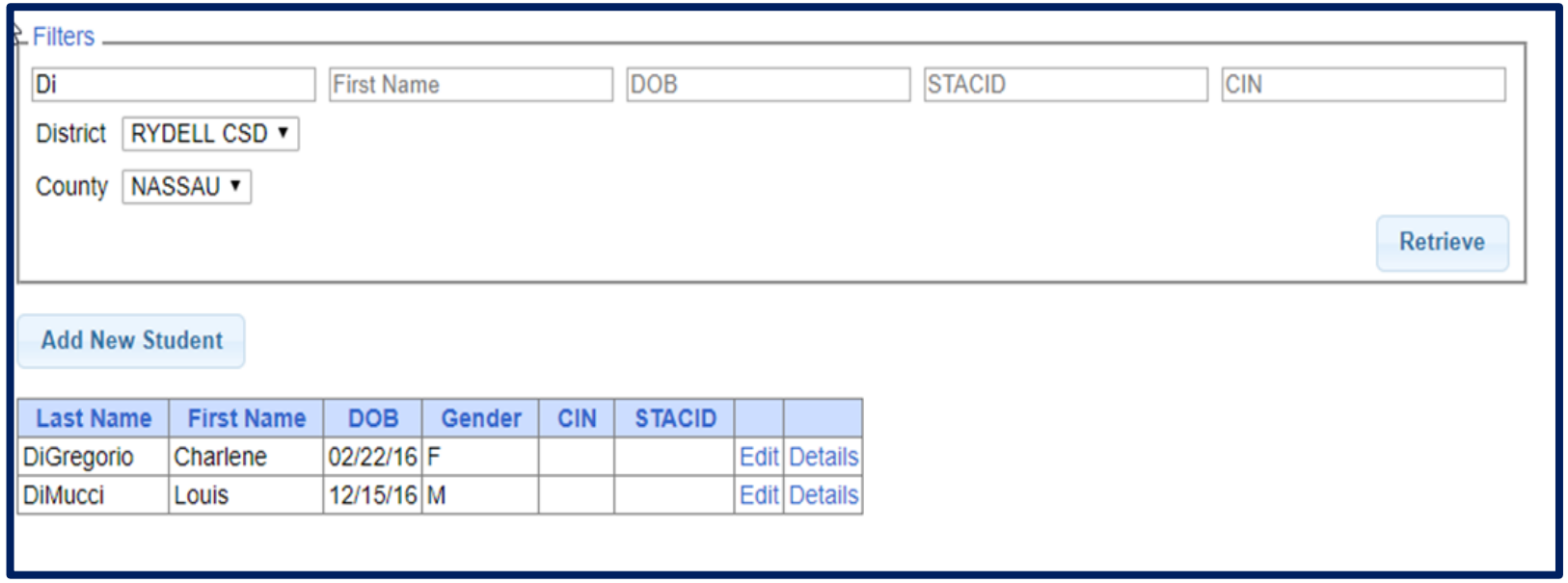
Clear Filters | Retrieve

Add New Student

Last Name	First Name	DOB	Gender	CIN	STACID	Student Number			
Balmudo	Leo	03/19/16	M			6600019969	Edit	Details	Delete
Carrington	Michael	04/04/16	M			6600019981	Edit	Details	Delete
Chisum	Tom	12/31/16	M			6600019967	Edit	Details	Delete
DelFuego	Anthony	03/12/16	M			6600019973	Edit	Details	Delete
DiGregorio	Charlene	02/22/16	F			6600019968	Edit	Details	Delete
DiMucci	Louis	12/15/16	M			6600019980	Edit	Details	Delete
Facciano	Franchesca	09/09/16	F			6600019971	Edit	Details	Delete
Jaworski	David	05/18/16	M			6600019972	Edit	Details	Delete
LaTierri	Sonny	08/13/16	M			6600019965	Edit	Details	Delete
Maraschino	Marty	07/22/16	F			6600019966	Edit	Details	Delete
McKenzie	Bradley	12/05/16	M			6600019974	Edit	Details	Delete
Misner	Martin	11/11/16	M			6600019978	Edit	Details	Delete
Murdoch	Kenickie	10/10/16	M			6600019970	Edit	Details	Delete
Nogerelli	John	06/14/16	M			6600019975	Edit	Details	Delete
Rebchuck	Paulette	08/22/16	F			6600019977	Edit	Details	Delete
Rizzo	Betty	09/09/16	F			6600019964	Edit	Details	Delete
Willard	Willie	05/11/16	M			6600019979	Edit	Details	Delete
Zinone	Stephanie	01/21/16	F			6600019976	Edit	Details	Delete

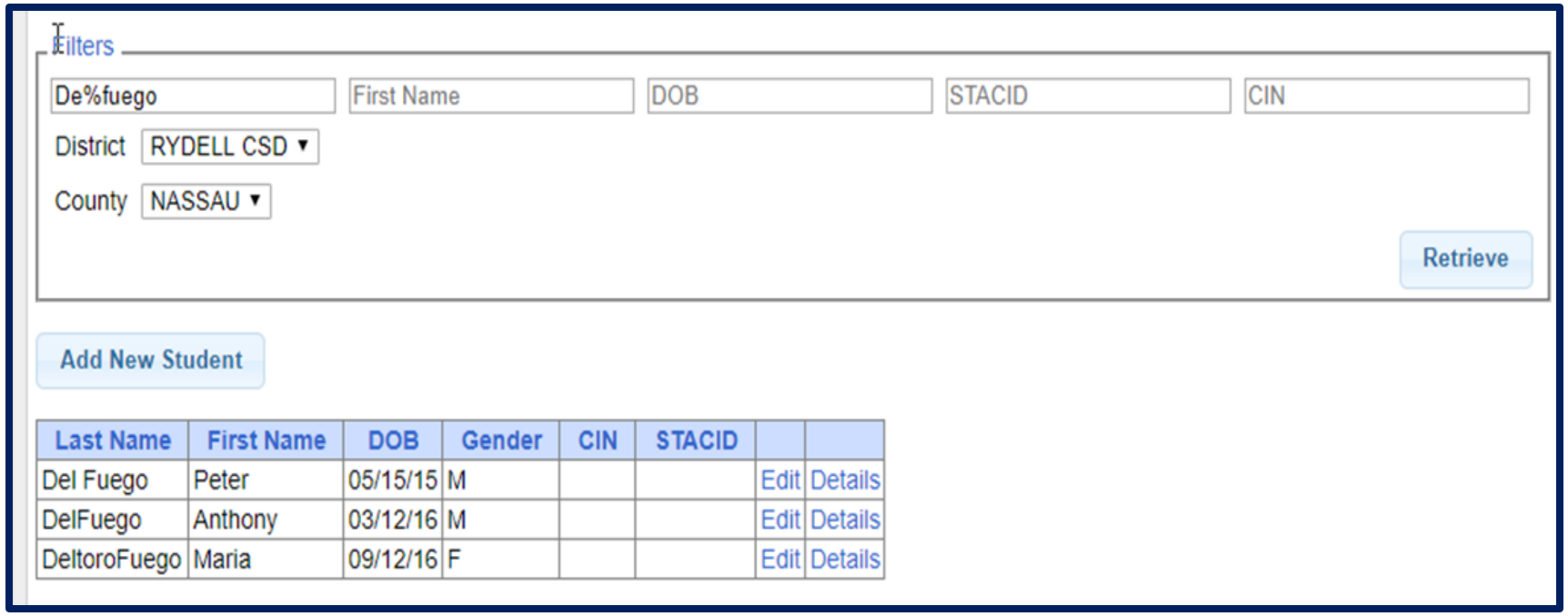
Student Search – Partial Name

* 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.



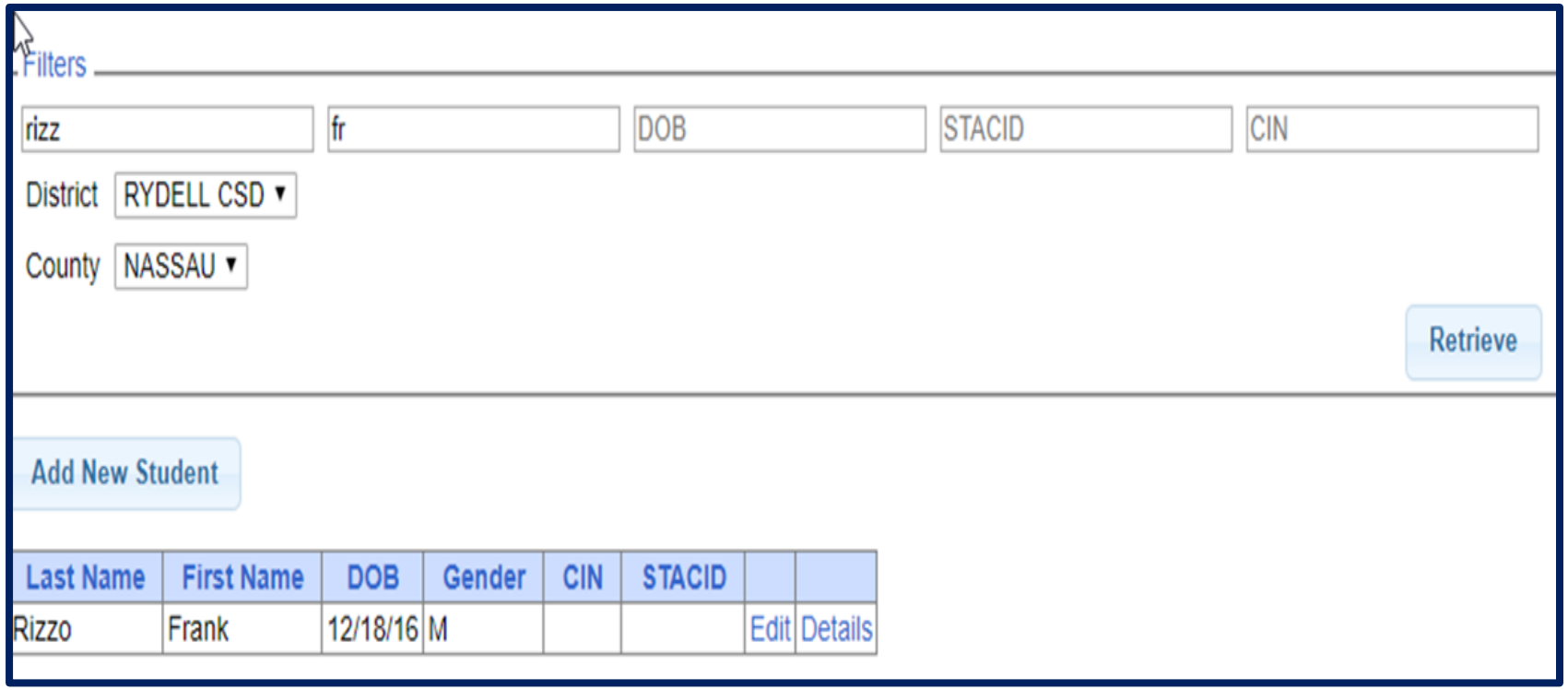
Student Search - Wildcard

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



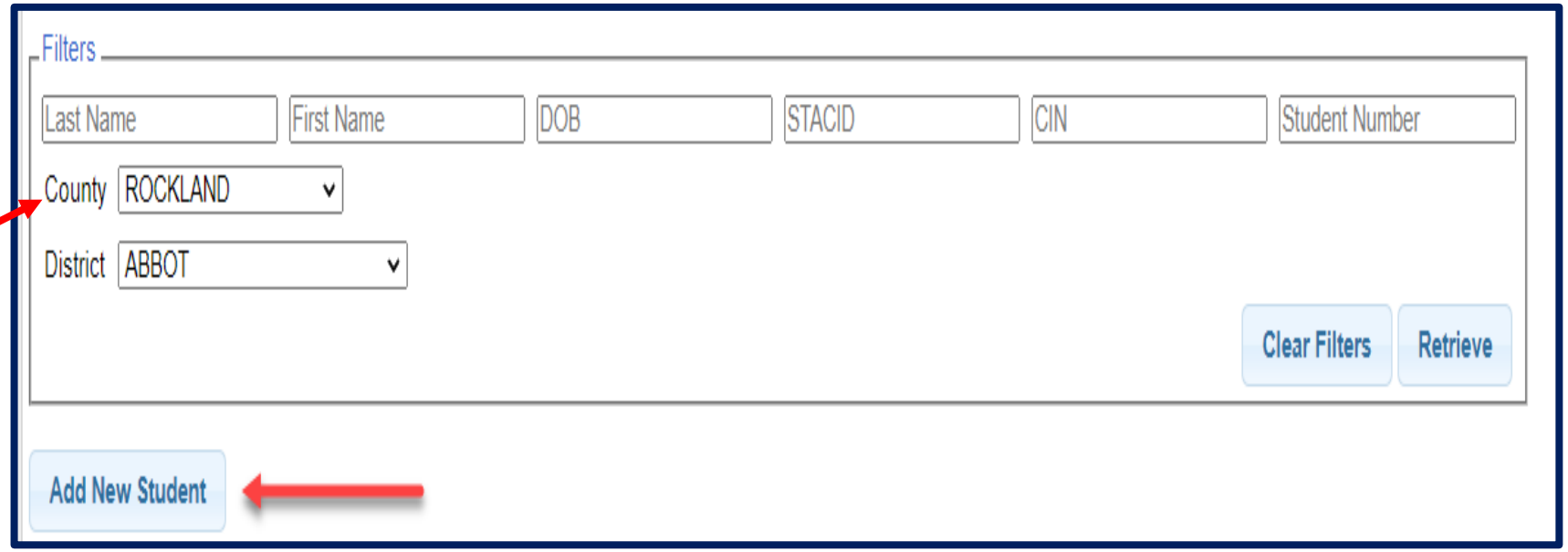
Student Search – Multiple Fields

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



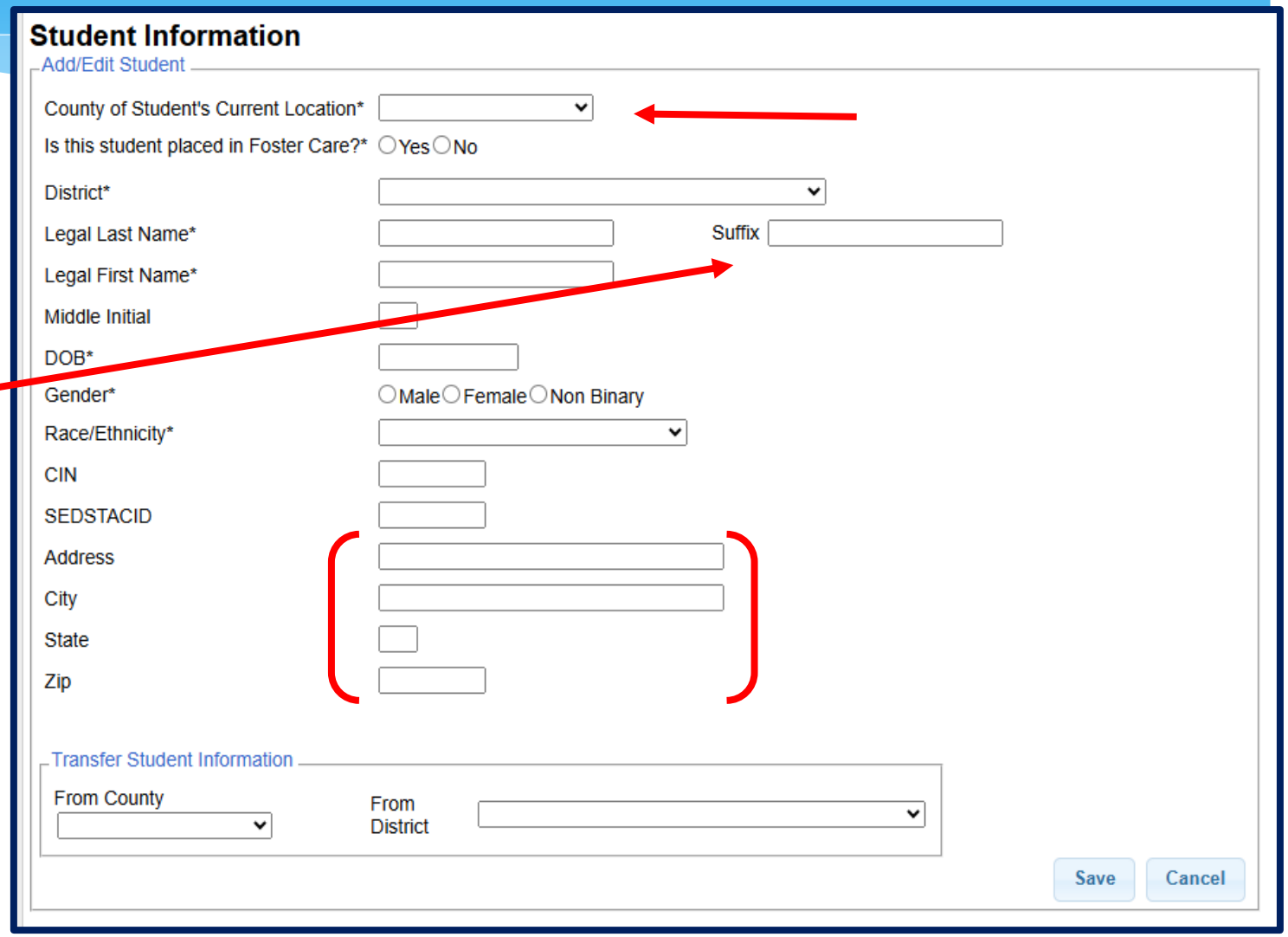
Adding a Student

* Go to the Student Search screen.
* Verify student is not already in system. This is very important so you do not create duplicate children.
* If you are a SD in 2 or counties, make sure you are choosing the correct county.
* Click on "*Add New Student*" button.



Student Information

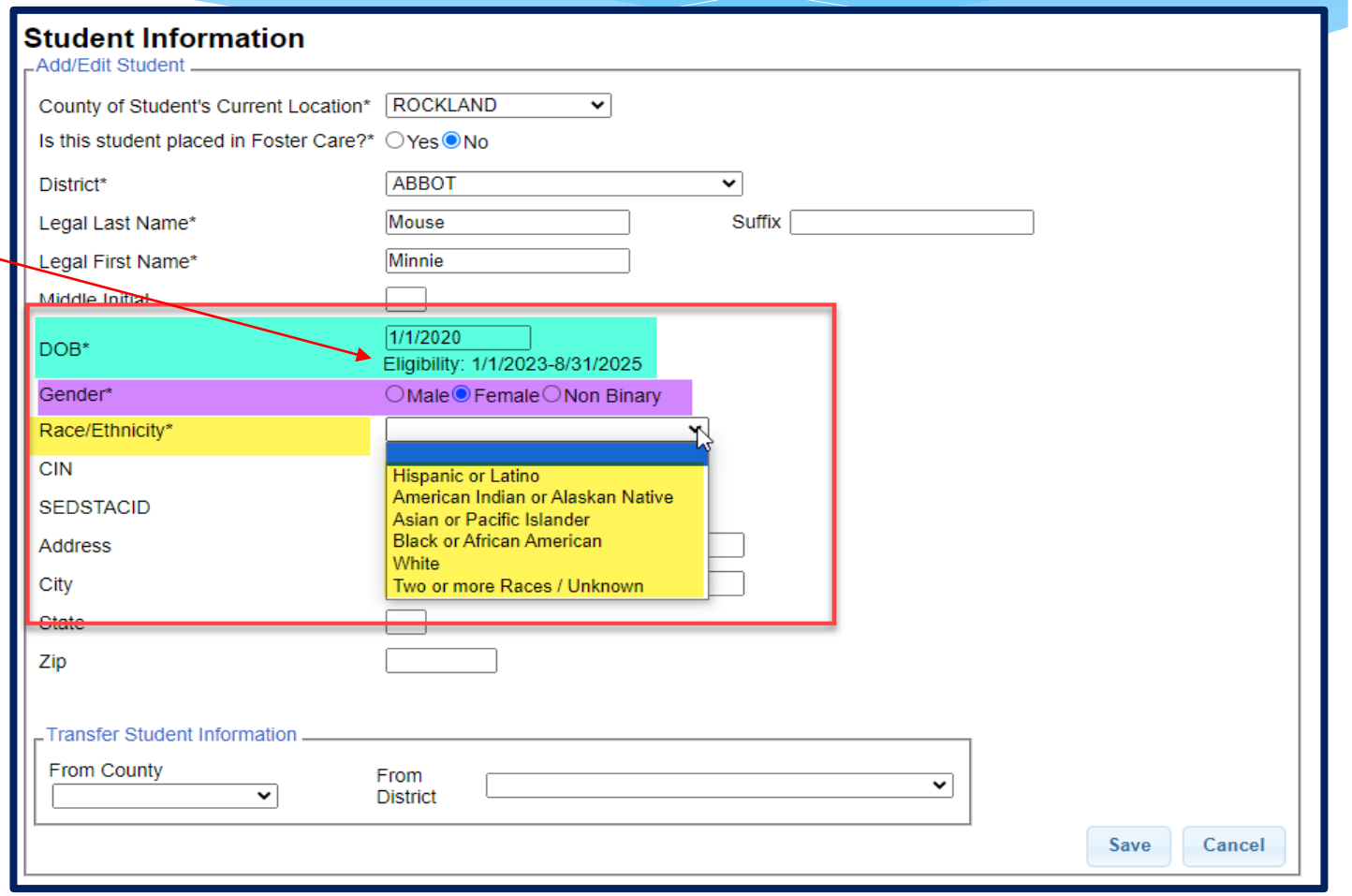
- Field with an asterisk (*) next to their label are required in order to save.
- When creating a child:
  - If the child is a Jr/II/III, please enter this information in the Suffix box. Do not include this with the child's last name.
- Herkimer County **requires** the address of the child.
- Other fields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



For help, email: eSTACs@CPSEPortal.com

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.



For help, email: eSTACs@CPSEPortal.com

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.
- Remember to enter the address of the child or you will receive an error when signing & submitting.

Student Information

Add/Edit Student

County of Student's Current Location* ROCKLAND

Is this student placed in Foster Care?* ○ Yes ○ No *Required

District* ABBOT

Legal Last Name* *Required Suffix

Legal First Name* *Required

Middle Initial

DOB* *Required

Gender* ○ Male ○ Female *Required

Race/Ethnicity* *Required

CIN

SEDSTACID

Address

City

State

Zip

Transfer Student Information

From County

From District

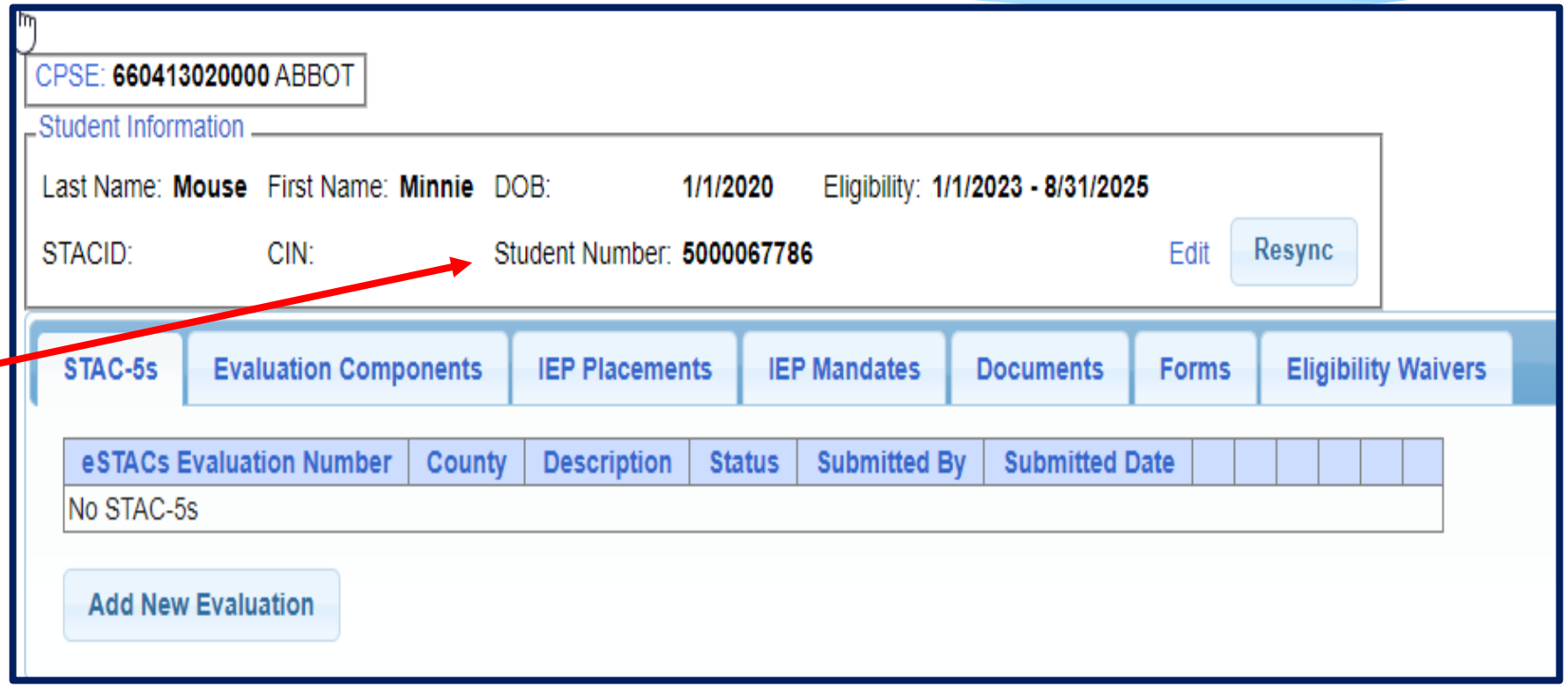
Save Cancel

For help, email: eSTACs@CPSEPortal.com

Student Details

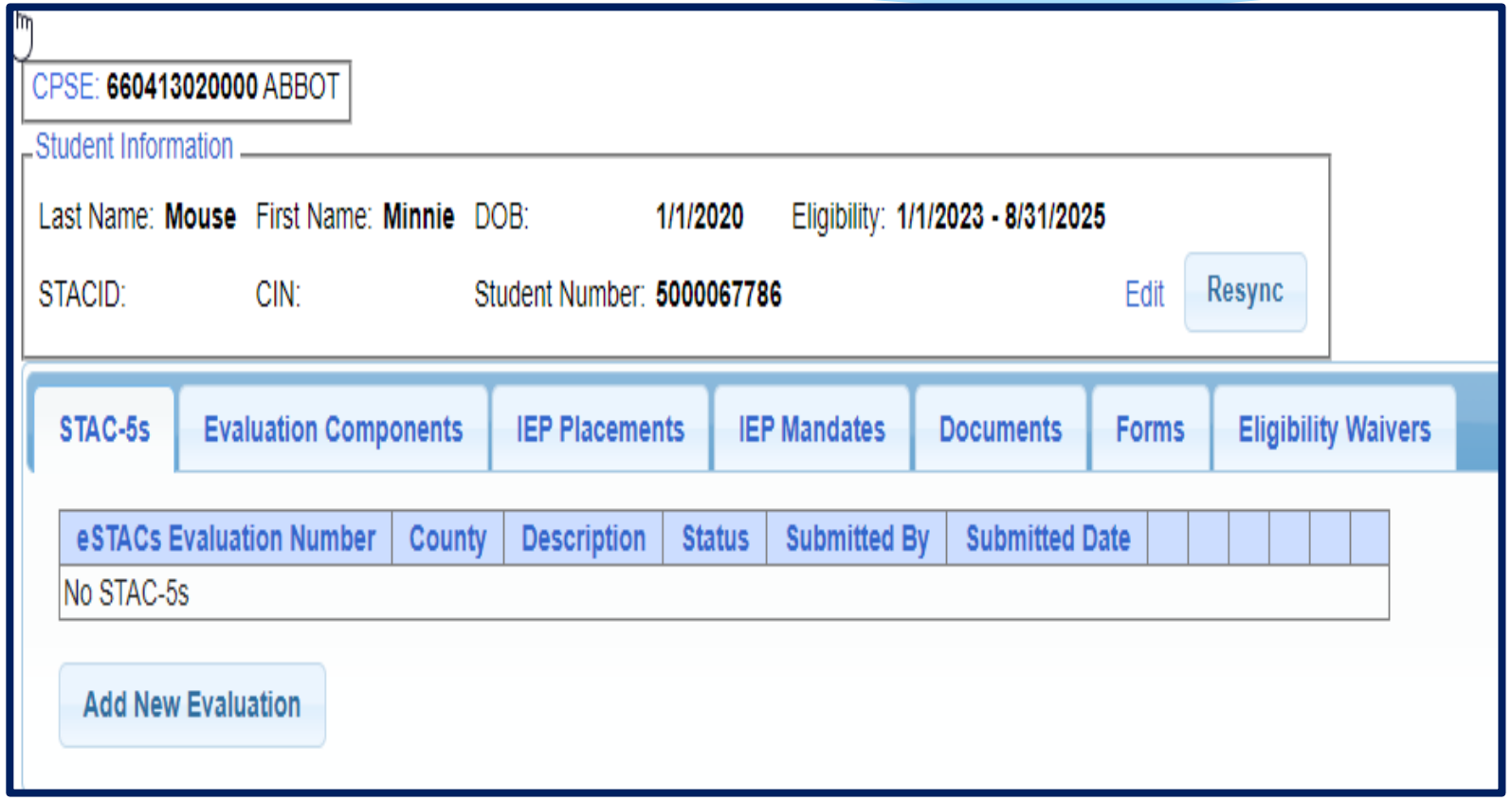
* Upon saving a new student, the system will take you to the student details page.

* Once student is created, each child is given a Student Number.



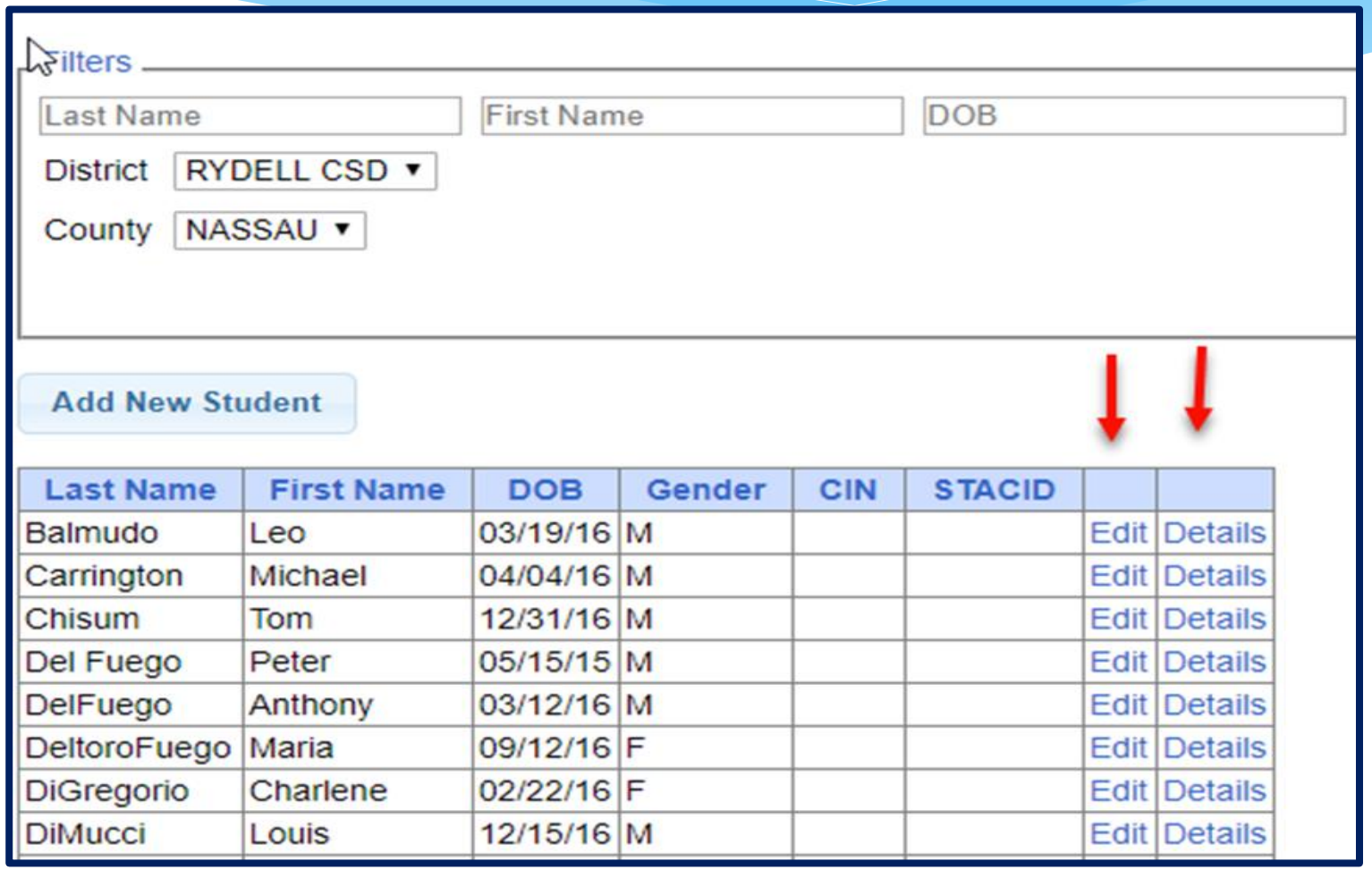
Student Details

- 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.

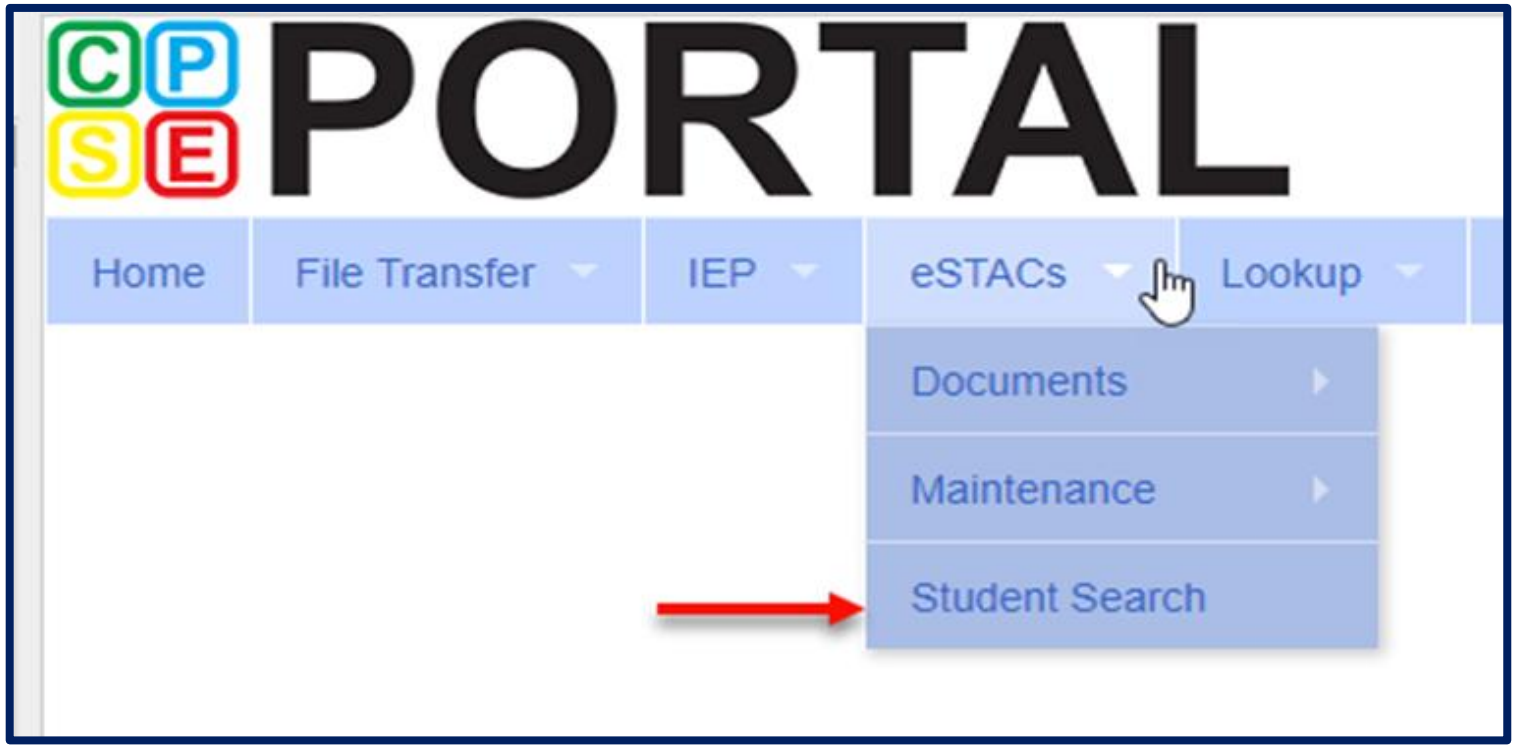


Last Name	First Name	DOB	Gender	CIN	STACID		
Balmudo	Leo	03/19/16	M			Edit	Details
Carrington	Michael	04/04/16	M			Edit	Details
Chisum	Tom	12/31/16	M			Edit	Details
Del Fuego	Peter	05/15/15	M			Edit	Details
DelFuego	Anthony	03/12/16	M			Edit	Details
DeltoroFuego	Maria	09/12/16	F			Edit	Details
DiGregorio	Charlene	02/22/16	F			Edit	Details
DiMucci	Louis	12/15/16	M			Edit	Details

eSTACs Entering STAC-5

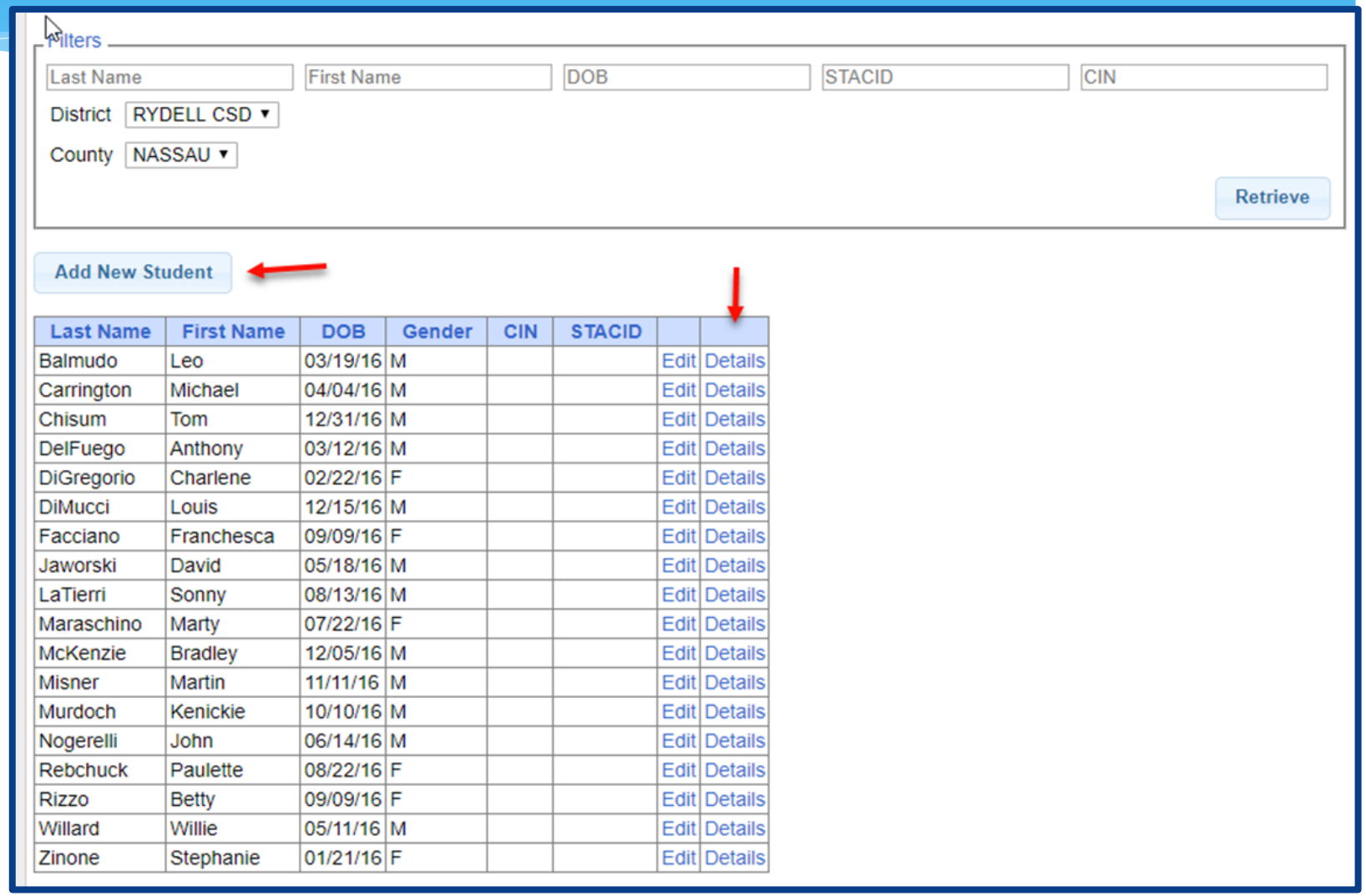
eSTACs Student Search

* Go to ***eSTACs -> Student Search***



Student Search for Student Details

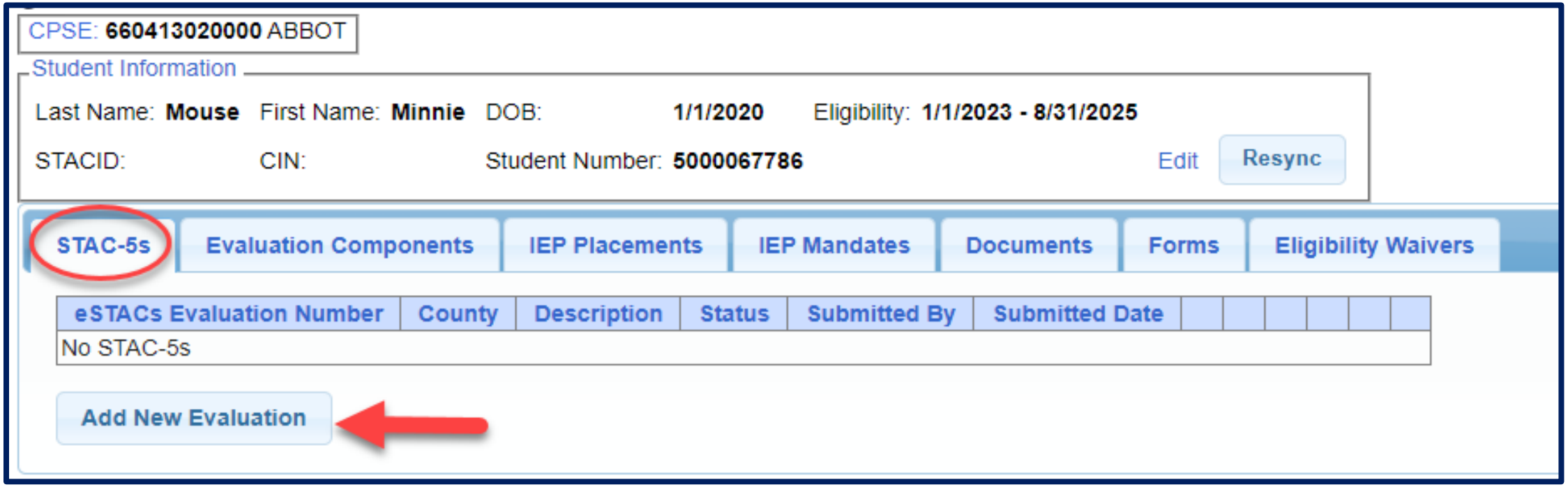
* Always search for the student first.
* If student is already in system, click the "***Details***" link for that student.
* If student does not exist, click "***Add New Student***".



Last Name	First Name	DOB	Gender	CIN	STACID		
Balmudo	Leo	03/19/16	M			Edit	Details
Carrington	Michael	04/04/16	M			Edit	Details
Chisum	Tom	12/31/16	M			Edit	Details
DelFuego	Anthony	03/12/16	M			Edit	Details
DiGregorio	Charlene	02/22/16	F			Edit	Details
DiMucci	Louis	12/15/16	M			Edit	Details
Facciano	Franchesca	09/09/16	F			Edit	Details
Jaworski	David	05/18/16	M			Edit	Details
LaTierri	Sonny	08/13/16	M			Edit	Details
Maraschino	Marty	07/22/16	F			Edit	Details
McKenzie	Bradley	12/05/16	M			Edit	Details
Misner	Martin	11/11/16	M			Edit	Details
Murdoch	Kenickie	10/10/16	M			Edit	Details
Nogerelli	John	06/14/16	M			Edit	Details
Rebchuck	Paulette	08/22/16	F			Edit	Details
Rizzo	Betty	09/09/16	F			Edit	Details
Willard	Willie	05/11/16	M			Edit	Details
Zinone	Stephanie	01/21/16	F			Edit	Details

Adding a New Evaluation

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



eSTACs vs Paper STAC-5

Evaluation Info

County* WESTCHESTER 2

School Year* 2020 - 2021

Provider* 1

Is this student placed in Foster Care?* Yes No

County at time of placement* 2

Child is: Preschool Student With a Disability Non-Disabled 4

Translation Cost 5

This student is eligible for evaluations from **09/01/2018** to **07/31/2021**

Evaluation	Component	Eval Date	Bilingual		
Social	SOC		☐		
Psychological	PSY		☐		
Speech/Language	SPT		☐		
Physical Therapy	PHT		☐		
Occupational Therapy	OCT		☐		
Physical/Medical	PHY		☐		
Education	EDU		☐	6	
Audiological	AUD		☐		
Other Physician	OTH		☐		
Other Non-Physician	OTH		☐		
Psychiatric	PYC		☐		
Neurological	NEU		☐		
Optometric	OPT		☐		
Orthopedic	ORT		☐		
Counseling	CSL		☐		
Functional Vision	FUV		☐		
Teacher of Visually Impaired	TVI		☐		
Neuropsychological	NPY		☐		

STAC-5

The University of the State of New York
THE STATE EDUCATION DEPARTMENT
STAC and Medicaid Unit

Rev. 8/2017

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 INFORMATION

Last Name | First Name | Middle Initial

Date of Birth (mm/dd/yy) ___/___/___ | Student Identification Number *(if applicable)* | Gender ☐ Female ☐ Male

DISABILITY

The child named above is:

☐ PD - Preschool Student With a Disability

☐ ND - Non-Disabled

4

RACIAL ETHNIC CATEGORY OF STUDENT

☐ Hispanic or Latino

Not of Hispanic Origin:

☐ American Indian or Alaskan Native
☐ Asian or Pacific Islander
☐ Black or African American
☐ Native Hawaiian or other Pacific Islander
☐ White
☐ Two or more Races

(see explanation on second page)

School District with CPSE Responsibility | CPSE District SED (BEDS) Code

County of Child's Current Location (where child resides) 2

County at time of Placement in Foster Care 3

Approved Evaluator 1

EVALUATION COMPONENT		MONTH / YEAR	CHECK IF BILINGUAL
Audiological	AUD	___/___	6
Counseling	CSL	___/___	
Education	EDU	___/___	
Functional Vision	FUV	___/___	
Music	MUS	___/___	
Neurological	NEU	___/___	
Neuropsychological	NPY	___/___	
Occupational Therapy	OCT	___/___	
Optometric (visual)	OPT	___/___	
Orthopedic	ORT	___/___	
Physical/Medical	PHY	___/___	
Physical Therapy	PHT	___/___	
Psychiatric	PYC	___/___	
Psychological	PSY	___/___	
Social	SOC	___/___	
Speech / Language	SPT	___/___	
Teacher of Visually Impaired	TVI	___/___	
Other: _____		___/___	

Cost of translation/transmittal of evaluation documentation or summary report for monolingual evaluations only. $ 5

PERSON COMPLETING THIS FORM

Name | Title

Phone | Email

CERTIFICATION OF EVALUATION: I certify that the preschool child herein named received a multidisciplinary evaluation as indicated above and in accordance with Section 4410 of the Education Law and the Regulations of the Commissioner of Education.

Signature CPSE Chairperson _____ 7 Date ___/___/___

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.

Signature of Authorized Representative of the Municipality _____ Date ___/___/___

Complete Fields Related to Evaluation

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

Evaluation Info

County*

School Year* 2021 - 2022

Provider*

Is this student placed in Foster Care?* ○ Yes ◉ No

Child is: ◉ Preschool Student With a Disability ○ Non-Disabled

Translation Cost

This student is eligible for evaluations from **03/01/2021** to **07/31/2023**

Evaluation	Component	Eval Date	Bilingual		
Audiological	AUD		☐		
Education	EDU		☐		
Neurological	NEU		☐		
Neuropsychological	NPY		☐		
Occupational Therapy	OCT		☐		
Optometric	OPT		☐		
Orthopedic	ORT		☐		
Other Non-Physician	OTH		☐		
Other Physician	OTH		☐		
Physical Therapy	PHT		☐		
Physical/Medical	PHY		☐		
Psychiatric	PYC		☐		
Psychological	PSY	11/01/2021	☐		
Social	SOC	11/01/2021	☐		
Speech/Language	SPT	11/01/2021	☐		
Teacher of Visually Impaired	TVI		☐		

Save Cancel

For help, email: eSTACs@CPSEPortal.com

Evaluations – STAC-5 Tab

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

CPSE: **660413020000** ABBOT

Student Information

Last Name: **Smith** First Name: **John** DOB: **1/1/2019** Eligibility: **1/1/2022 - 8/31/2024**

STACID: CIN: Student Number: **5000067785** Edit Resync

STAC-5s | Evaluation Components | IEP Placements | IEP Mandates | Documents | Forms | Eligibility Waivers

eSTACs Evaluation Number	County	Description	Status	Submitted By	Submitted Date						
EV00048818	ROCKLAND	ARC -- PRIME TIME FOR KIDS Sep 2022 (PSY, SOC, SPT)	Amended			Amend	Rescind	Print	Sign and Submit	Submission History	Resync
EV00048819	ROCKLAND	ARC -- PRIME TIME FOR KIDS Jul 2023 (PSY, SOC)	Not Submitted			Edit	Delete	Print	Sign and Submit		Resync

Add New Evaluation

Evaluation Components Tab

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

CPSE: **660413020000** ABBOT

Student Information

Last Name: **Smith** First Name: **John** DOB: **1/1/2019** Eligibility: **1/1/2022 - 8/31/2024**

STACID: CIN: Student Number: **5000067785** Edit Resync

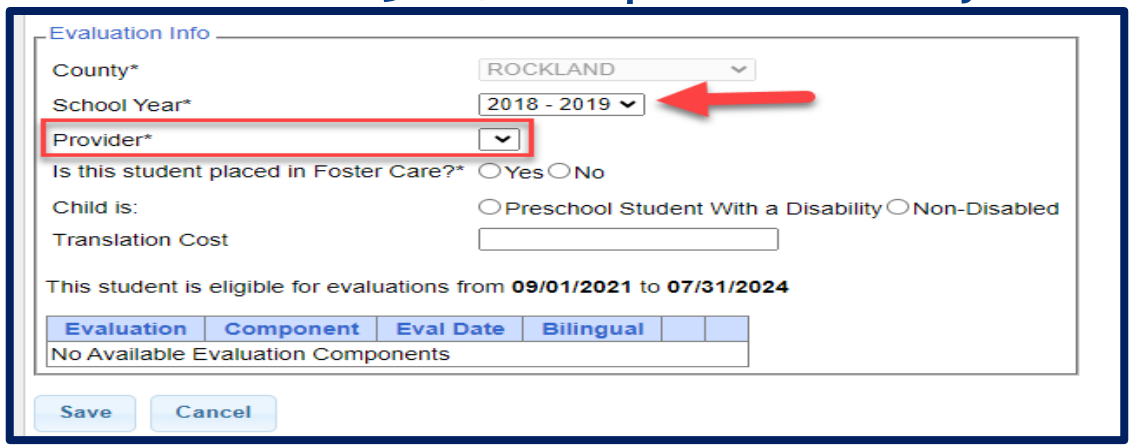
STAC-5s | Evaluation Components | IEP Placements | IEP Mandates | Documents | Forms | Eligibility Waivers

eSTACs Evaluation Number	eSTACs Evaluation Component Number	County	Provider	Component	Eval Date	Bilingual	Status	Submitted By	Submitted Date		
EV00048818	EC00145985	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Psychological	9/15/2022	No	Submitted	kellyknowles	6/14/2023	Amend	Rescind
EV00048818	EC00145986	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Social	9/15/2022	No	Submitted	kellyknowles	6/14/2023	Amend	Rescind
EV00048818	EC00145987	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Speech/Language	9/12/2022	No	Amended			Amend	Rescind
EV00048819	EC00145988	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Psychological	7/12/2023	No	Not Submitted			Edit	Delete
EV00048819	EC00145989	ROCKLAND	ARC -- PRIME TIME FOR KIDS	Social	7/12/2023	No	Not Submitted			Edit	Delete

Add New STAC-5

Evaluations Crossing Over School Years

* If you have evaluations and:
  * One evaluation was completed in the 24/25 SY – then that evaluation will be a paper STAC-5 for the 24/25 SY, and sent to the county.
  * If other evaluations are for July 1, 2025 dates and forward – then enter those evaluations into eSTACs under the 25/26 SY.
  * If you try to enter evaluations for same student with different years, you will get an error.
* You **cannot** add any evaluations for 23/24 and prior school years.



For help, email: eSTACs@CPSEPortal.com

eSTACs Uploading Documents

Documents Required for Evaluations – Herkimer County

* Herkimer County requires the following documents to be uploaded, before you can sign and submit your STAC-5:
  * **A Medicaid Parental Consent:**
    * A signed Medicaid Parental Consent or,
    * An Unable to Obtain Medicaid Consent.
  * **A signed Consent to Evaluate**
  * **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.

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.

Last Name: **Mouse** First Name: **Mickey** DOB: **10/19/2019** Eligibility: **7/1/2022 - 8/31/2024**

STACID: CIN: Student Number: **5000067792** Edit Resync

STAC-5s | Evaluation Components | IEP Placements | IEP Mandates | Documents | Forms | Eligibility Waivers

Uploaded Documents

	Document Type	Uploaded Date	Applied To	Submitted Date	SubmittedUser	Status	Comments			
Select	Unidentified	03/15/2024	Student Record			NOT SUBMITTED		Edit View	Delete	
Select	Unidentified	03/15/2024	Student Record			NOT SUBMITTED		Edit View	Delete	

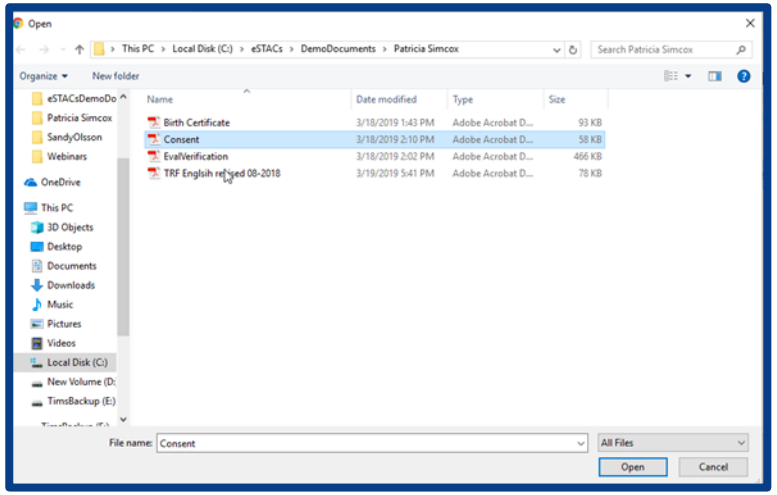
Missing Documents

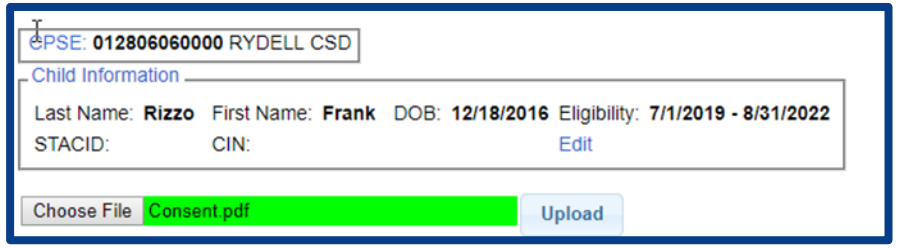
Category	Type	DocumentDescription	Applies To		
CHILD	MEDICAID CONSENT	Medicaid Parental Consent		Show Document List	Upload
PLACEMENT	AIDE FORM	Copy of SED AIDE form for partial/shared AIDE for CB Placement	09/06/2023-06/21/2024 A STARTING PLACE-9100(J)	Show Document List	Upload
PLACEMENT	IEP	Copy of IEP for Placement	09/06/2023-06/21/2024 A STARTING PLACE-9100(J)	Show Document List	Upload

Upload | Upload Multiple Documents

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*".

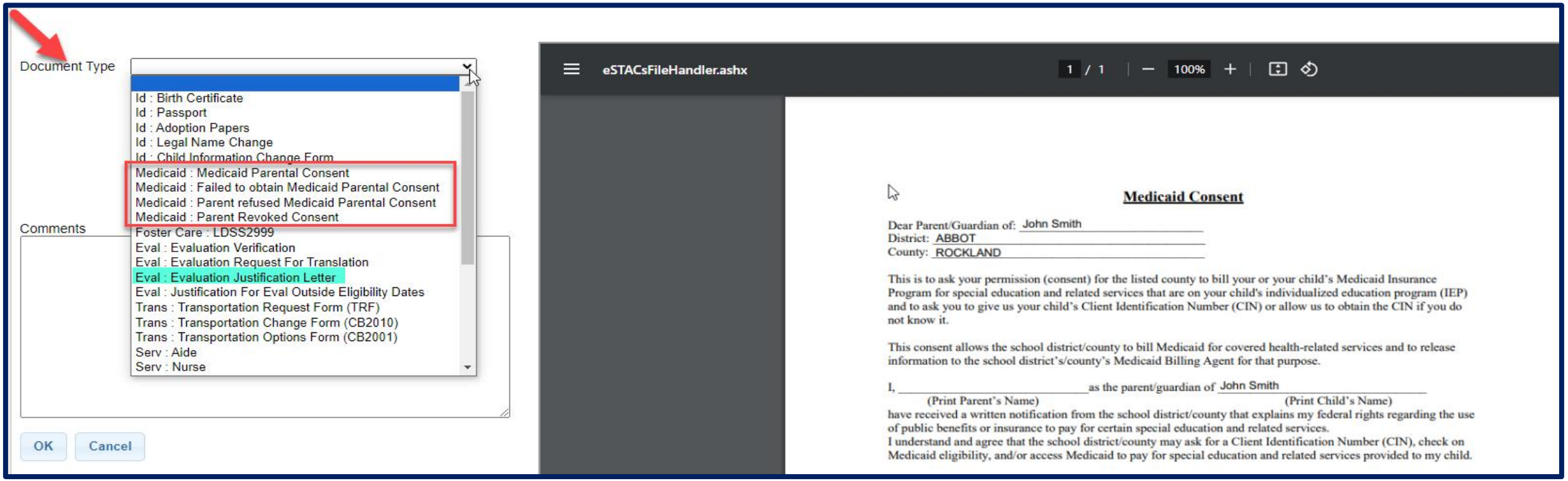




For help, email: eSTACs@CPSEPortal.com

Indicate Document Type

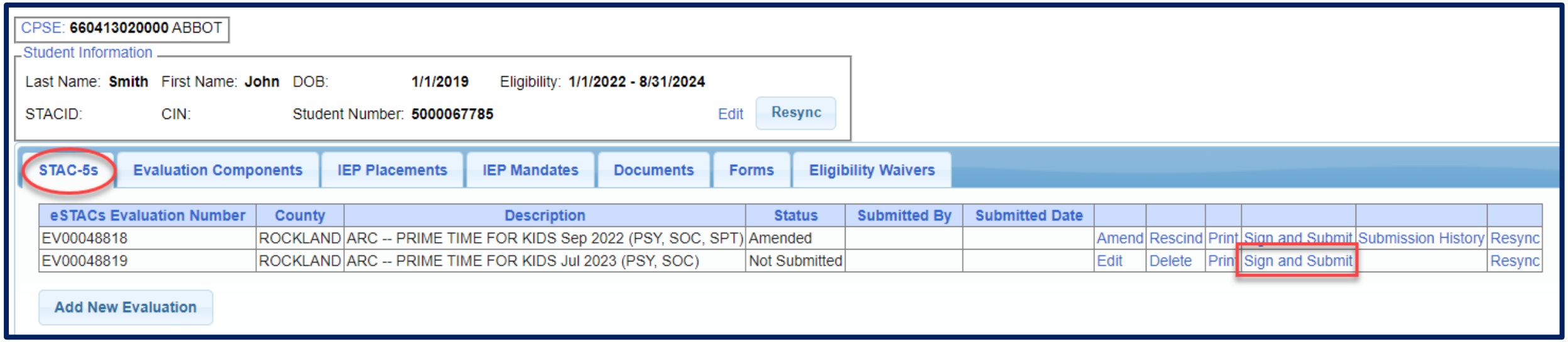
* Right hand side shows the document.
* Left hand side shows fields to specify what type of document it is, as well as other related fields specific to the type of document.



eSTACs Sign and Submit

Sign and Submit Evaluation – Signing Per Student

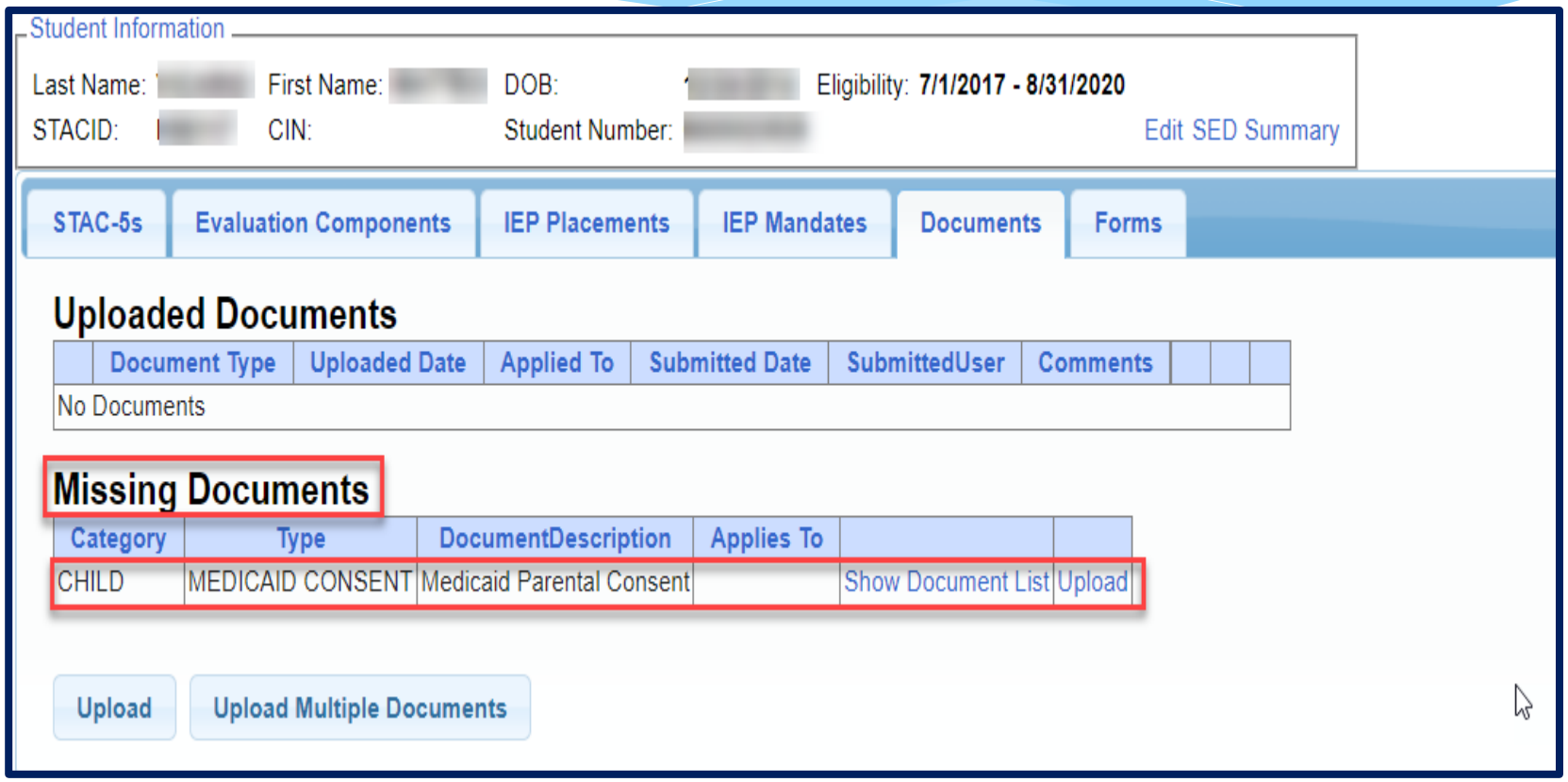
* Once all documents have been uploaded, you can now "*Sign and Submit*" the STAC-5.
* The Status, Submitted By & Submitted Date columns will now show a status of submitted, who submitted the STAC-5, and the date submitted.
* This will now be sent to the county for review.



For help, email: eSTACs@CPSEPortal.com

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.

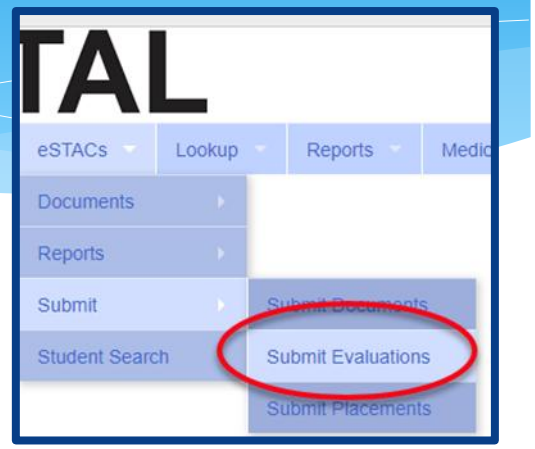
1 You do not have a person record assiociated with this account. Please fill in your firs

2 You have not yet created your PIN. Please create your PIN now.

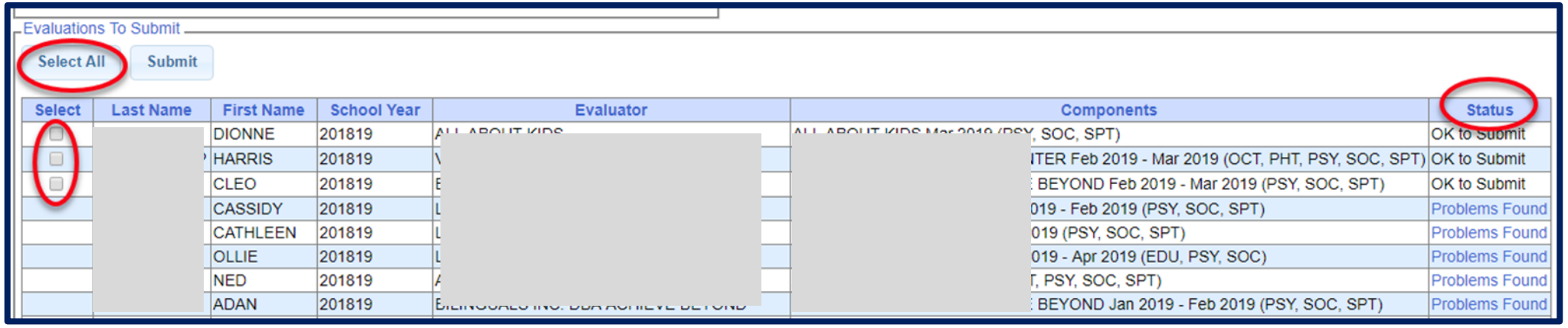
3 Please enter your signature title and credentials on the "My Profile" page.

4 You are not authorized by the county to sign evaluations.

Sign and Submit Evaluations – Signing All Unsubmitted Evaluations at One Time



- 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.



Cannot Submit – Problems Found

* Click on the Problems Found and the problems will populate as to why you cannot sign & submit.

Filters

County [redacted] School Year All School Years

Show All
Only OK To Submit
Only Problems

Retrieve

Evaluations To Submit

Select All Submit

Select	Last Name	First Name	School Year	Evaluator	Components	Status
	[redacted]	WYNTER	202425	[redacted]	[redacted]ES Jan 2025 (PHT)	Problems Found
	[redacted]	NYRA	202425	[redacted]	[redacted]ES Jan 2025 (SPT)	Problems Found
	[redacted]	Gabriel	202425	[redacted]	[redacted]ES Jan 2025 - Feb 2025 (OCT, PHT, PSY, SOC, SPT)	Problems Found

CPSE: [redacted]y

Student Information

Last Name: [redacted] First Name: [redacted] DOB: **12/7/2021** Eligibility: **7/1/2024 - 8/31/2027**
STACID: [redacted] CIN: Student Number: [redacted] Edit SED Summary

Evaluation Components

Date Completed	Provider	Evaluation
1/25/2025 12:00:00 AM	[redacted]S	Physical Therapy

Problems

Component	Problem
STAC-5	Evaluation must indicate whether the student has a disability or not
STAC-5	Missing Document to prove identification of child
STAC-5	Missing Medicaid Parental Consent

Forms

Forms Tab

* The Forms tab has a list of generic forms that when chosen, will populate with the child's information on them.
  * The Medicaid Parental Consent form will be on Herkimer County letterhead and is not generic.

CPSE: **660413020000** ABBOT

Student Information

Last Name: **Smith** First Name: **John** DOB: **1/1/2019** Eligibility: **1/1/2022 - 8/31/2024**

STACID: CIN: Student Number: **5000067785** Edit Resync

STAC-5s | Evaluation Components | IEP Placements | IEP Mandates | Documents | Forms | Eligibility Waivers

School Year

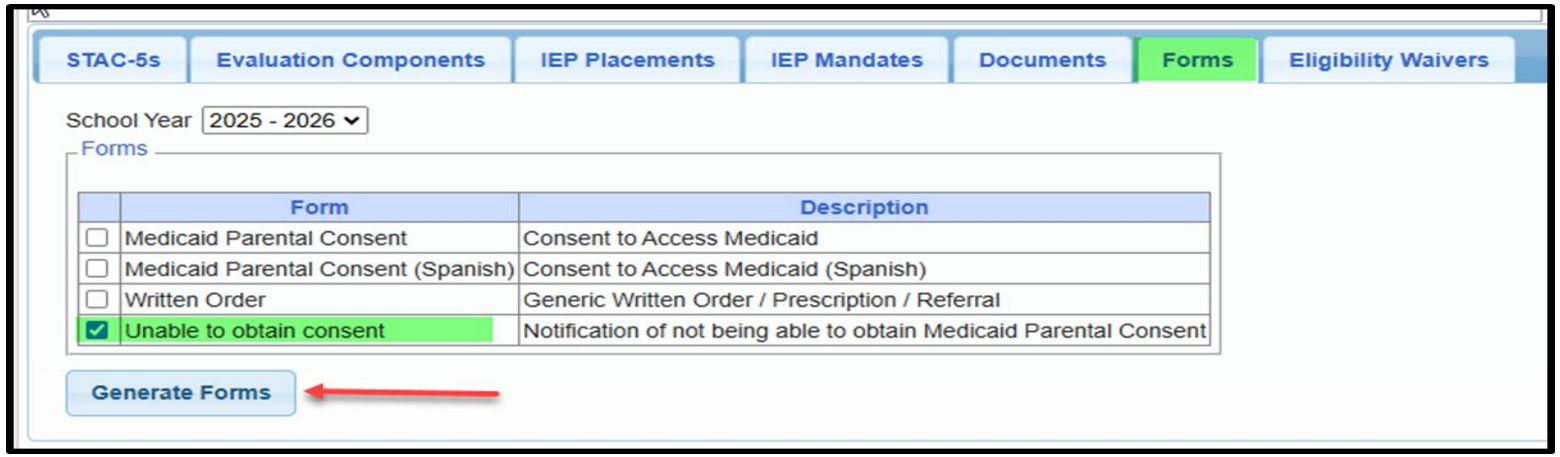
Forms

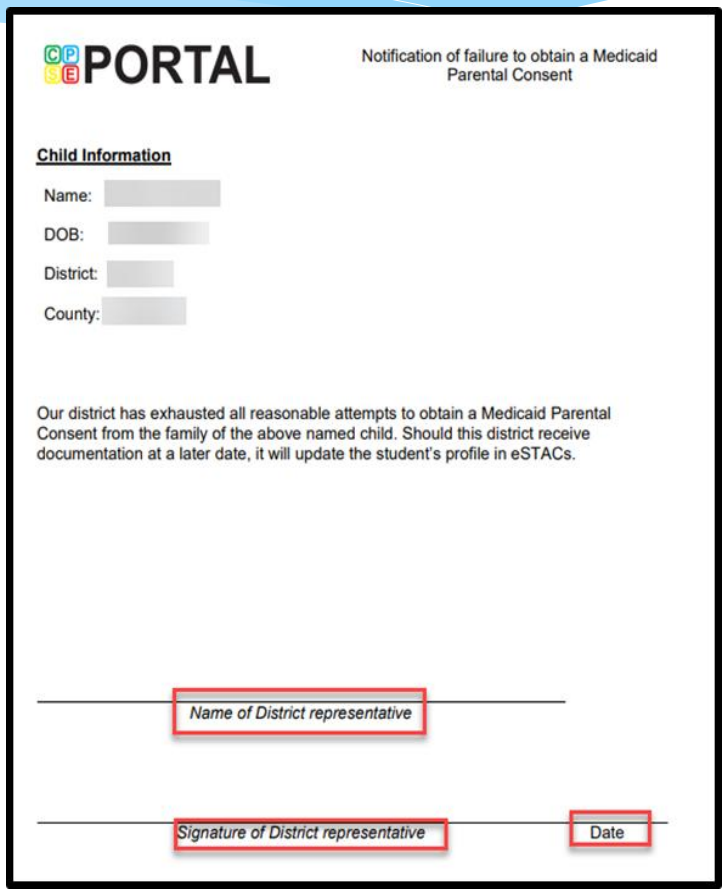
	Form	Description
☐	Medicaid Parental Consent	Consent to Access Medicaid
☐	Medicaid Parental Consent (Spanish)	Consent to Access Medicaid (Spanish)
☐	Written Order	Generic Written Order / Prescription / Referral
☐	Unable to obtain consent	Notification of not being able to obtain Medicaid Parental Consent

Generate Forms

Forms Tab

* If you could not obtain a Medicaid Consent, you can click on the Unable to Obtain Consent form.
* Complete form & upload as Failed to Obtain Medicaid Parental Consent.
* Once you receive the Medicaid Consent back from the parent(s), upload the consent into the child's documents page.





CPSE PORTAL

Notification of failure to obtain a Medicaid Parental Consent

Child Information

Name:

DOB:

District:

County:

Our district has exhausted all reasonable attempts to obtain a Medicaid Parental Consent from the family of the above named child. Should this district receive documentation at a later date, it will update the student's profile in eSTACs.

Name of District representative

Signature of District representative

Date

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.
* Always contact the county first so see if this is an option.

Evaluation Amendments

Amending Evaluations

Evaluation Amendments

What needs to be changed	What to do
Entered the wrong County	Rescind entire STAC-5 and submit a new one
Entered the wrong District	
Entered the wrong School Year	
Entered the wrong Provider for every Component	
Entered the wrong Evaluation Component	Rescind the specific Evaluation Component, create a new STAC-5 with the correct component
Entered the wrong Provider for one Component	
Needs to add a new Discipline(s)	Add a new STAC-5 with just the new Discipline(s)
Entered the wrong Evaluation Date	Amend the specific Evaluation Component
Entered the wrong Bilingual Indicator	

Closing

Herkimer County Timeline

* **June 13, 2025:**
  * Herkimer County will **no longer accept any 25/26 STAC's**. You will however continue to send your 24/25 paper STAC's to the county.

* **June 18, 2025:**
  * McGuinness will migrate all of the children that are in the Herkimer County Preschool system over into eSTACs. Each district will only be able to see their own children. McGuinness will also bring over any 25/26 services that have already been entered into Preschool, and any Medicaid Consents that the county has received.

* **June 19, 2025:**
  * School districts will begin entering STAC's into eSTACs.

* **All prior year STAC-1's** (24/25, 23/24, 22/23 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 and include your phone number and best times to reach you. Our office is closed from 12-1:00 daily for lunch.