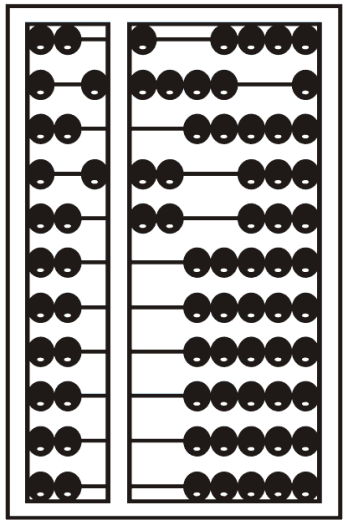
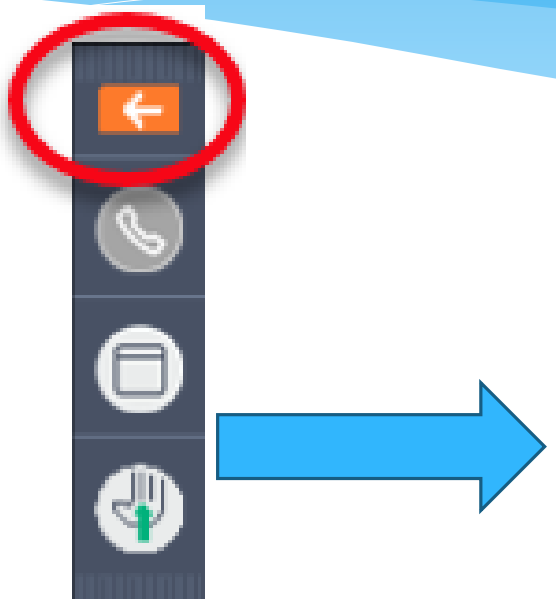
JAMES McGUINNESS & ASSOCIATES INC.
Consultants

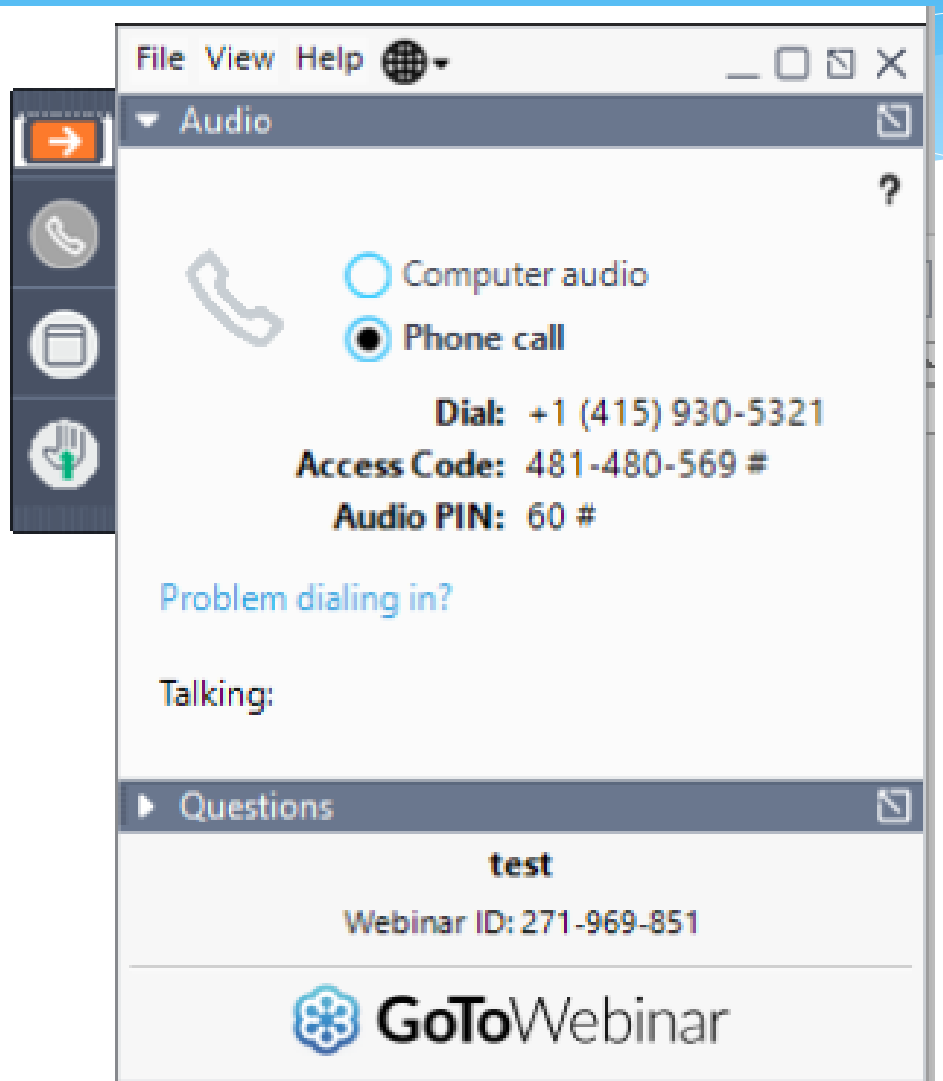


Using GoToWebinar

Go to Webinar Control Panel

* Control panel is on far right of screen
* Orange button with white arrow expands and shrinks control panel



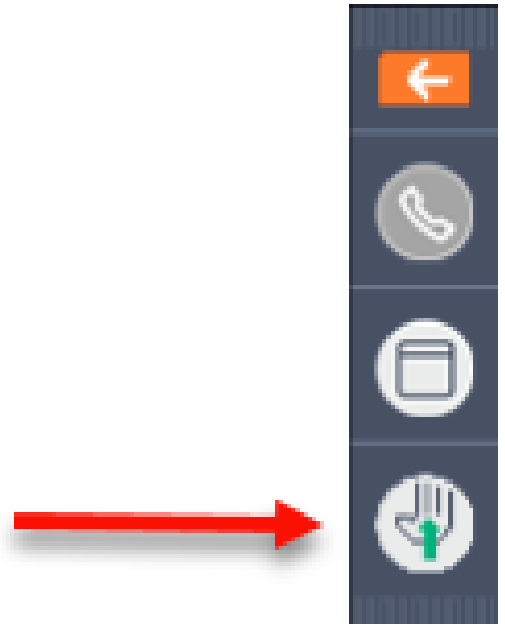


Communicating with Presenter

* All participants are on mute
* Two ways to communicate with us
  * 1-Raise your hand
  * 2-Type in a question
* You can type in question in the question box or the chat

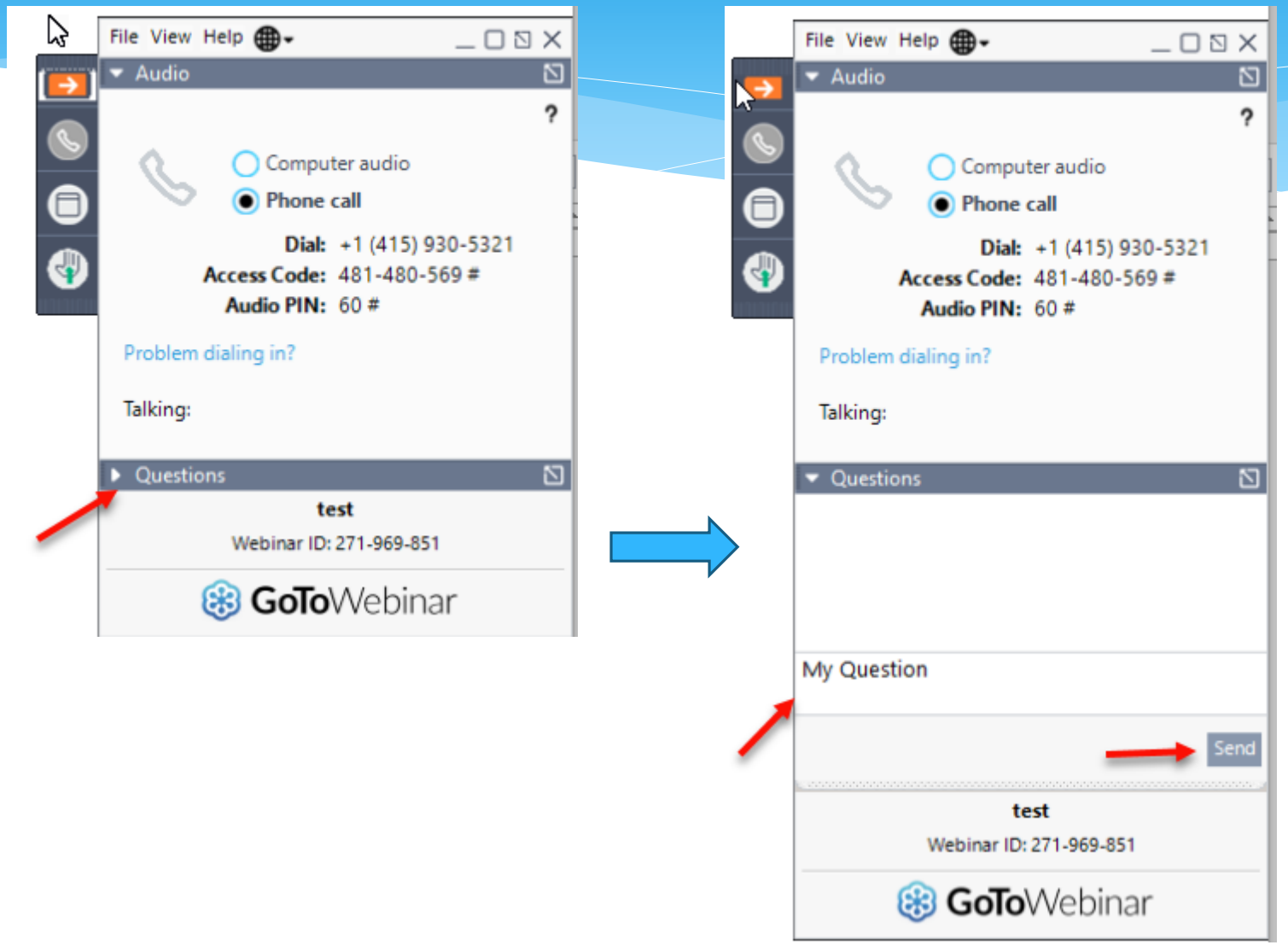
Raising your hand

* On bottom left of control panel is a button with a hand icon
* Click that button to raise your hand



Typing in a Question

* Click the question bar to expand questions section
* Type in your question and click send



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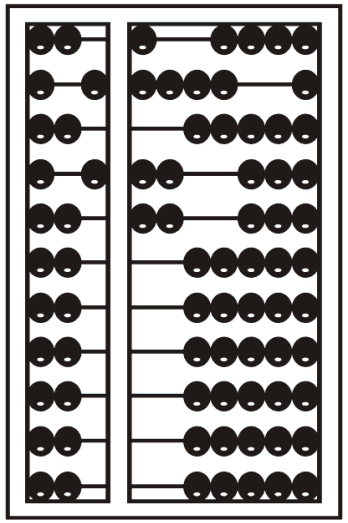
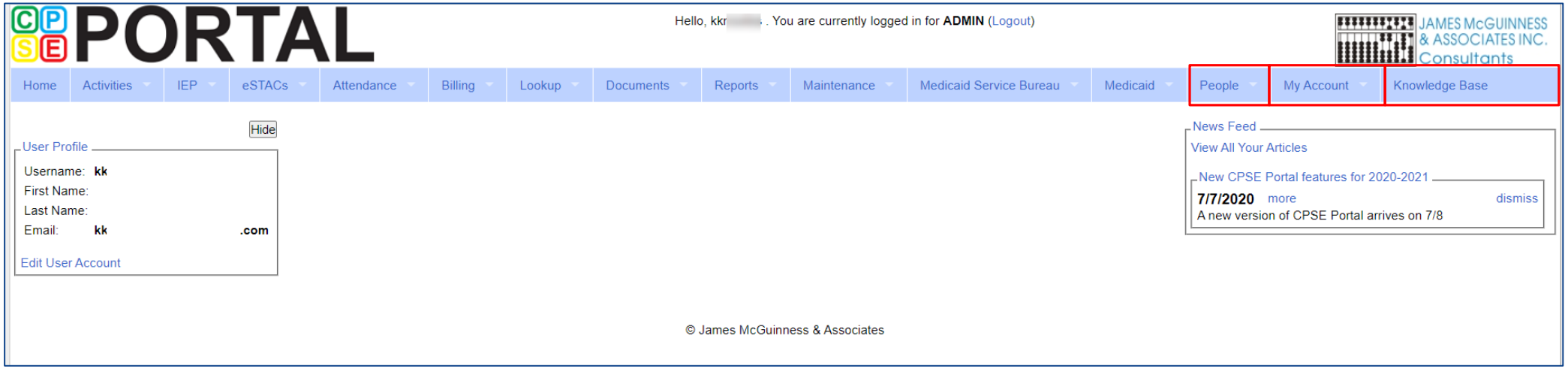


CPSE Portal
Initial Setup
Agency Service Providers
and
Independent Providers

TOPICS COVERED

- **Accepting Invitation** – slide 9
  - Therapists that work for multiple agencies have one login
- **Portal Invitations** – slide 10
  - Sample Email Invite
  - Accepting Invitation
- **Billing Provider Profile (Independent Providers ONLY)** – slide 12
- **Choosing Your PIN** – slide 14
- **Resetting Forgotten Password** – slide 15
- **Changing Your Password** – slide 16
- **Edit My User Information** – slide 17
- **My Articles/News Feed** – slide 18
- **Knowledge Base** – slide 19
- **Upcoming Webinars** – slide 20
- **Closing Remarks and CPSE Portal Support Information** – slide 21

CPSE Portal

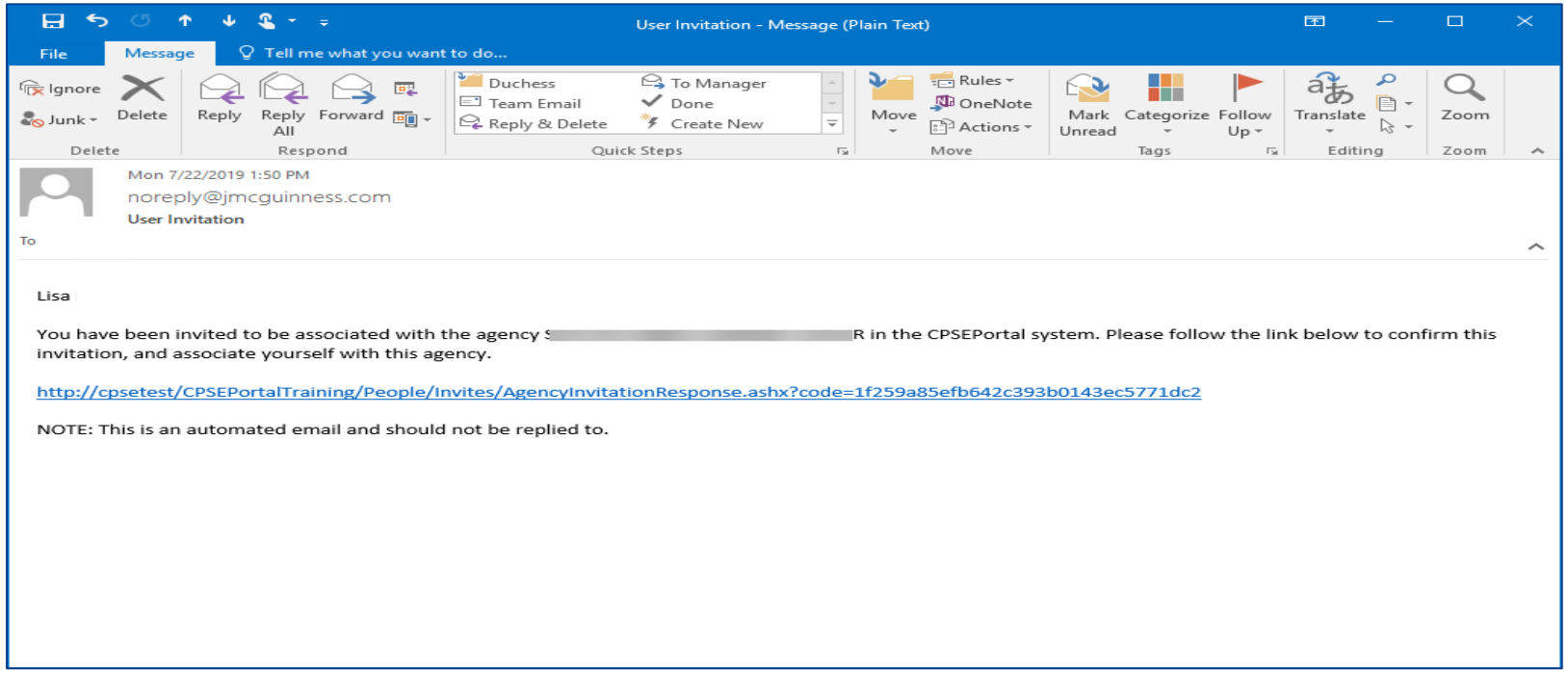

PORTAL
Hello, kk . You are currently logged in for ADMIN (Logout)
JAMES McGUINNESS & ASSOCIATES INC. Consultants
Home
Activities
IEP
eSTACs
Attendance
Billing
Lookup
Documents
Reports
Maintenance
Medicaid Service Bureau
Medicaid
People
My Account
Knowledge Base
Hide
User Profile
Username: kk
First Name:
Last Name:
Email: kk .com
Edit User Account
News Feed
View All Your Articles
New CPSE Portal features for 2020-2021
7/7/2020 more dismiss
A new version of CPSE Portal arrives on 7/8
© James McGuinness & Associates

Portal Invitations

* The agency is the primary link between the CPSE Portal & service providers.
* Agencies will send an email invitation to a Service Provider to join the Portal.
* The service provider will click the link in the email and set up your username, password, and PIN.
* The county will send Independent Providers an email invitation to join the Portal.
* Independent providers will need to click the link in the email and set up your username, and password, and create a PIN for 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.

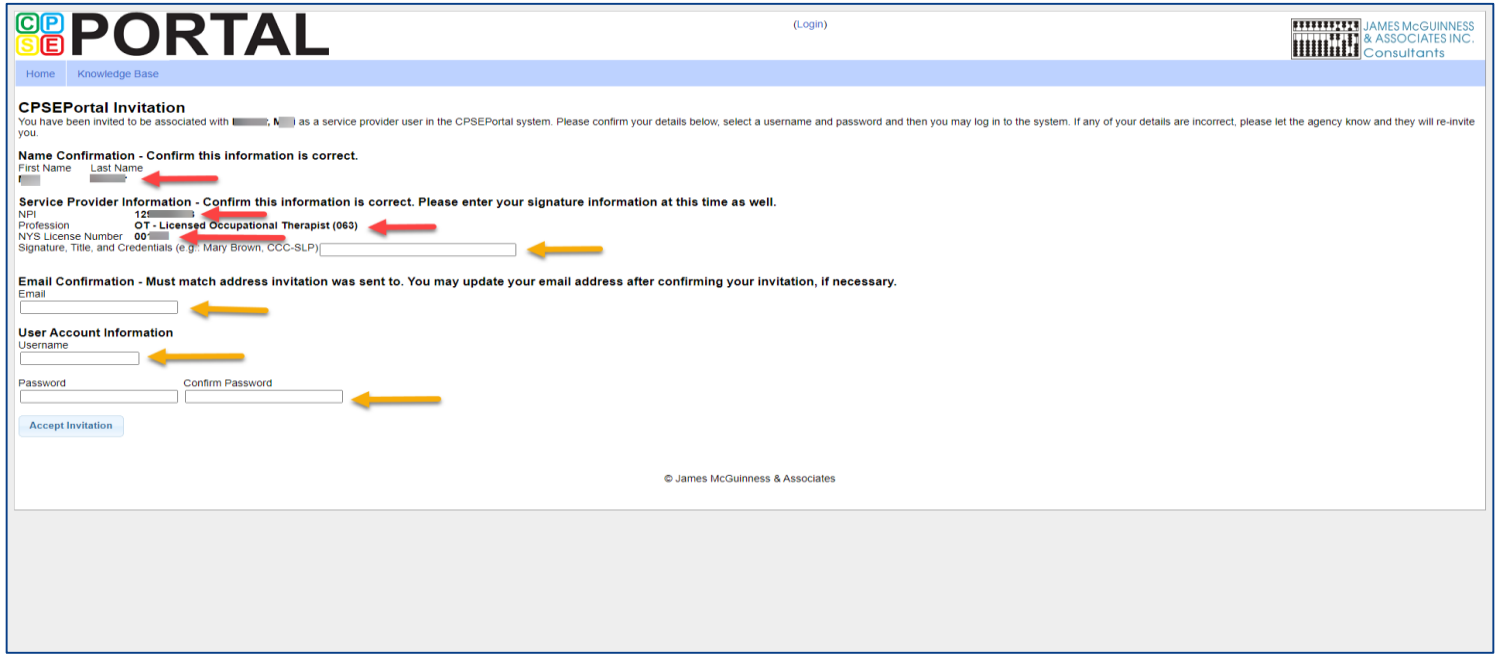
Portal Invitations - Sample Email Invite

After the agency or county 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.



Portal Invitations – Accepting Invitation

This screen comes up after the provider clicks the link. The service provider/independent 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.



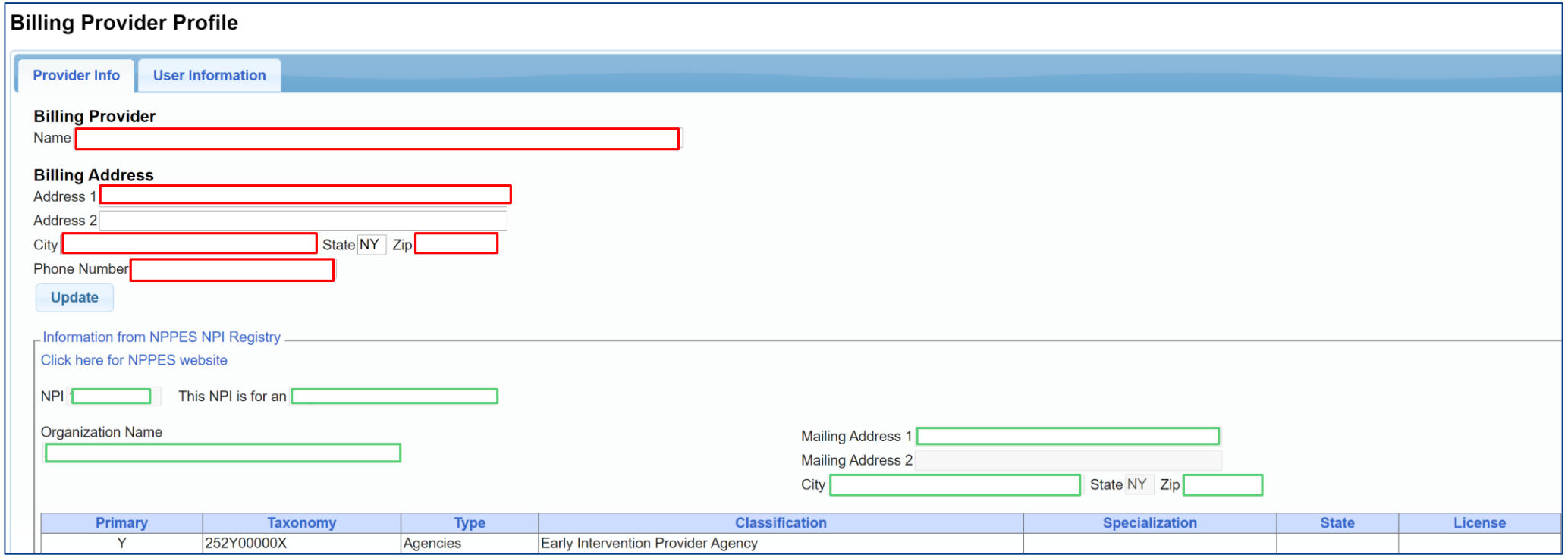
Billing Provider Profile – Independent Providers ONLY

* Independent Providers 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

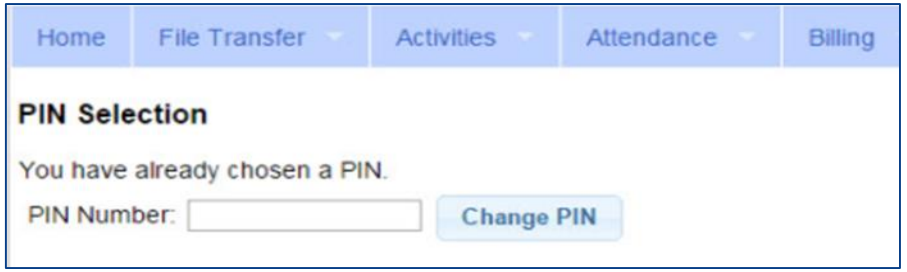
All information entered on this screen will be the Independent Providers information.



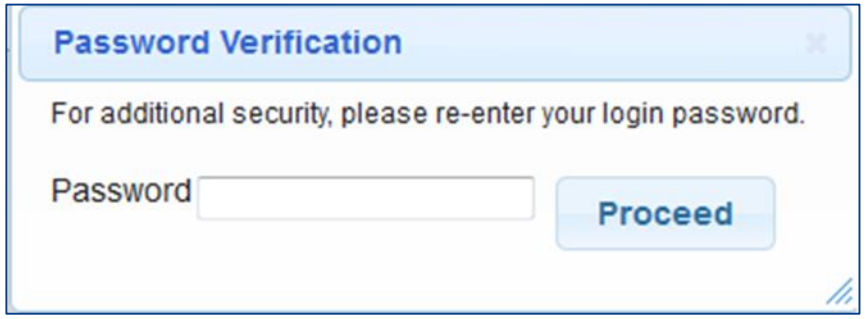
Choosing Your PIN

* Choosing PIN: My Account > My Pin

* Enter your PIN number and click the button ("Choose PIN" for first time PIN setup, "Change PIN" for changing current PIN)



* Enter your login password (NOT your pin) to confirm your PIN change and click "Proceed"
  * http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318

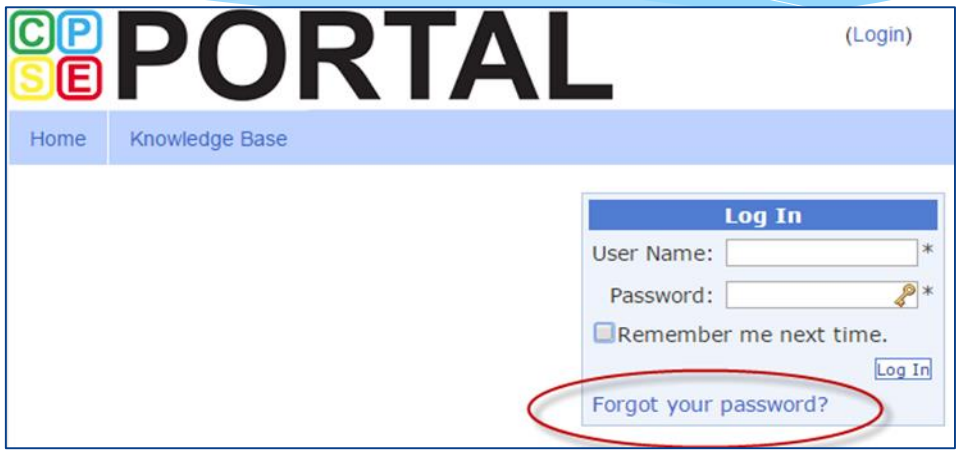


Resetting Forgotten Passwords

* 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.

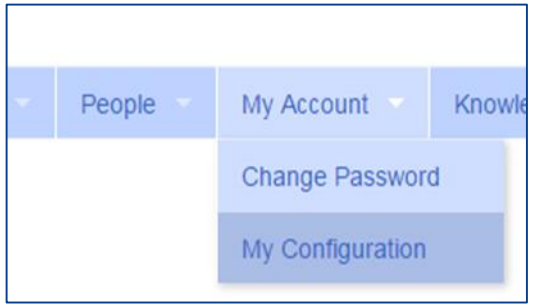
* On the Password Recovery page, enter your user name and click Submit. You will be emailed a new password.

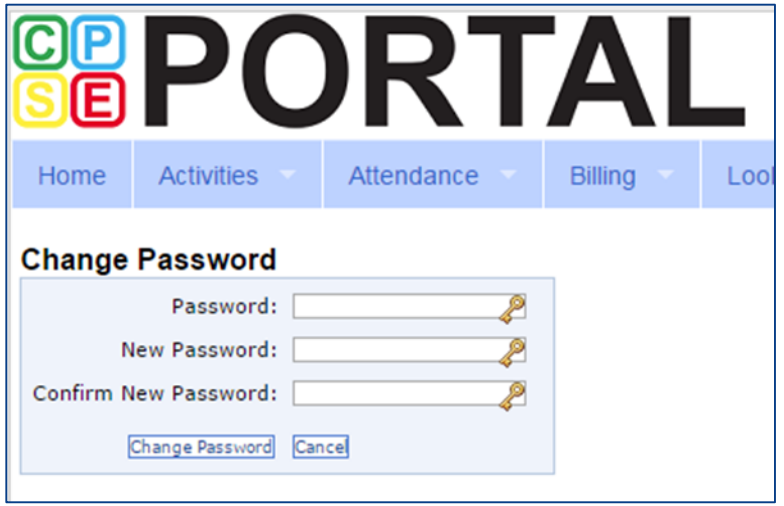
* http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316



Changing Your Password

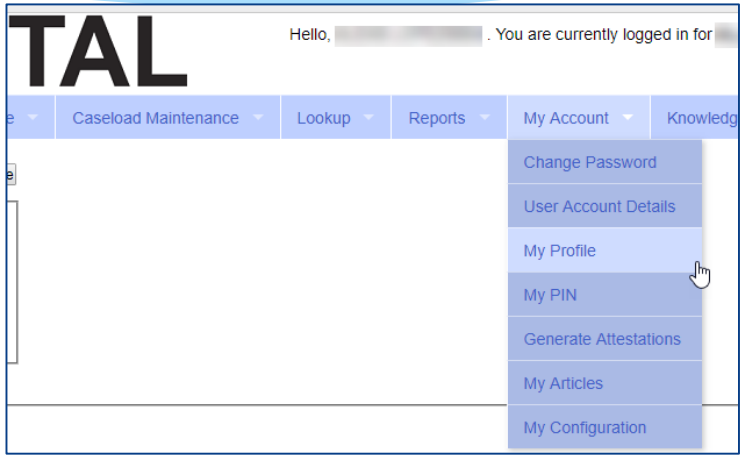
* Go to My Account > Change Password.
* Enter your current password in the password field.
* Enter your New Password.
* Re-enter your New Password to confirm it was entered correctly.
* http://support.cpseportal.com/kb/a14/change-password.aspx?KBSearchID=16315

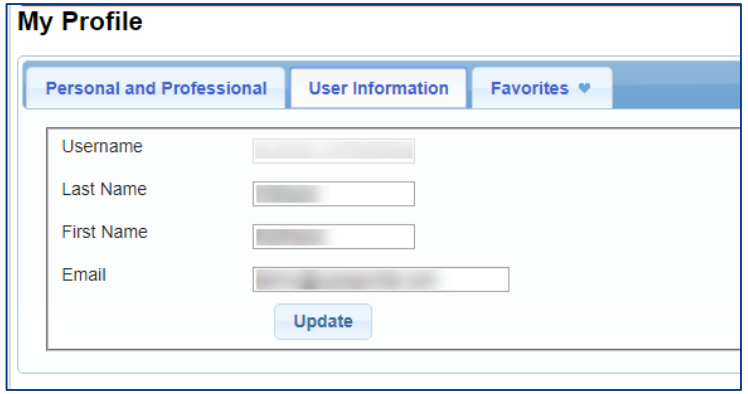




Edit My User Information

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

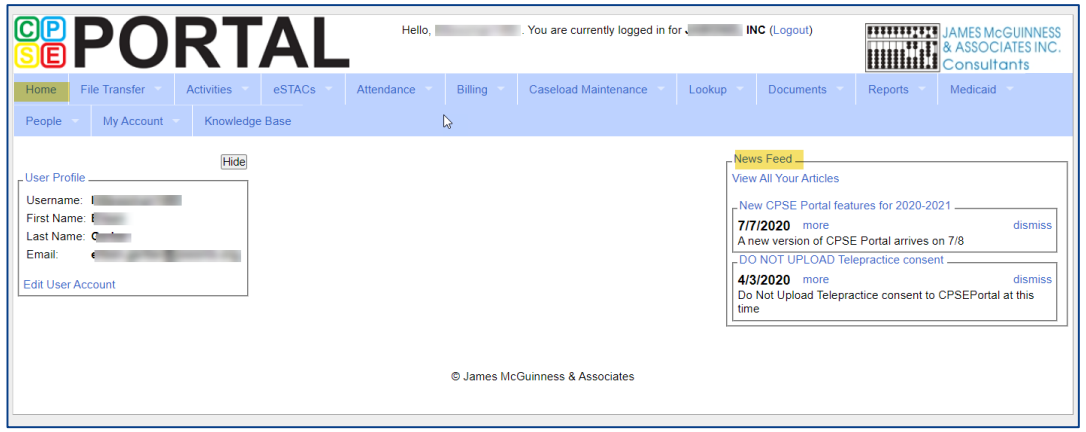




News Feed / My Articles

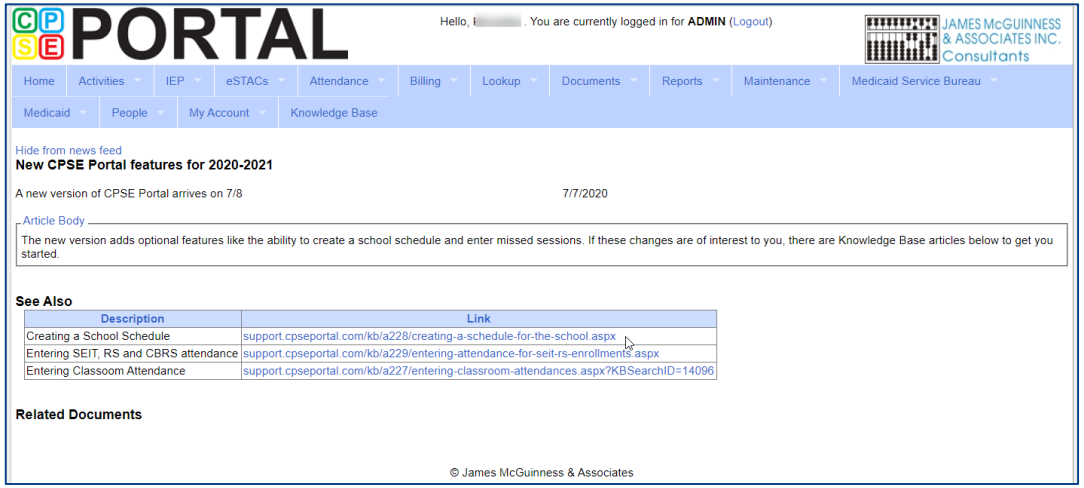
News Feed contains current articles and updates to the Portal. News Feed can be found in 2 ways.

Your current News Feed will be located on your Home Page



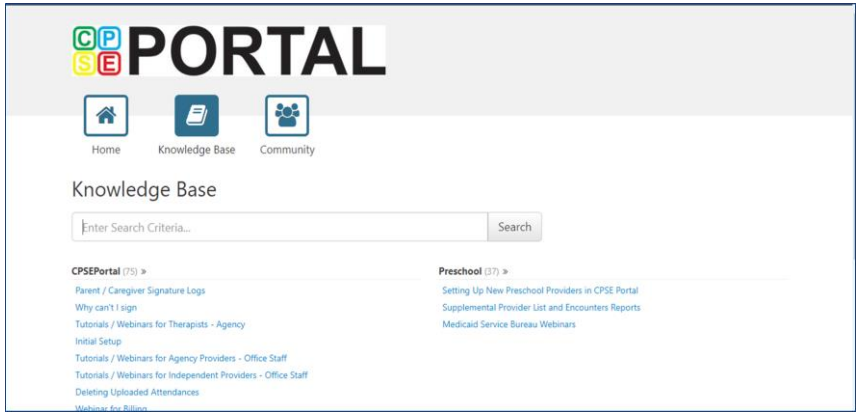
For all News Feed articles:

My Account\My Articles\View



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

- Initial Set-Up (Independent Provider & Agency Providers)
  - 6/01/21 @ 11AM
    https://attendee.gotowebinar.com/register/1459254655135806478
- Case Management (Agency)
  - 6/7/21 @ 11:00 AM
    https://attendee.gotowebinar.com/register/4695699455850631 80
- Case Management (CB Setup and Classroom Attendance)
  - 6/9/21 @ 11:00 AM
    https://attendee.gotowebinar.com/register/8263476810772993292

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 Helpdesk is available through email at support@CPSEPortal.com