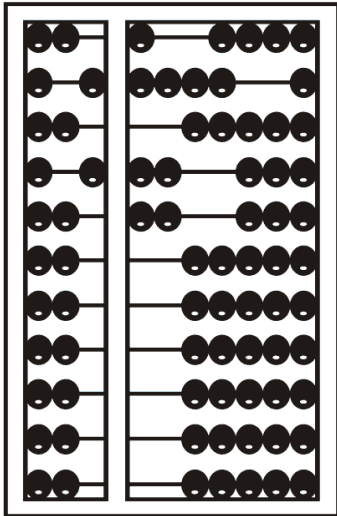


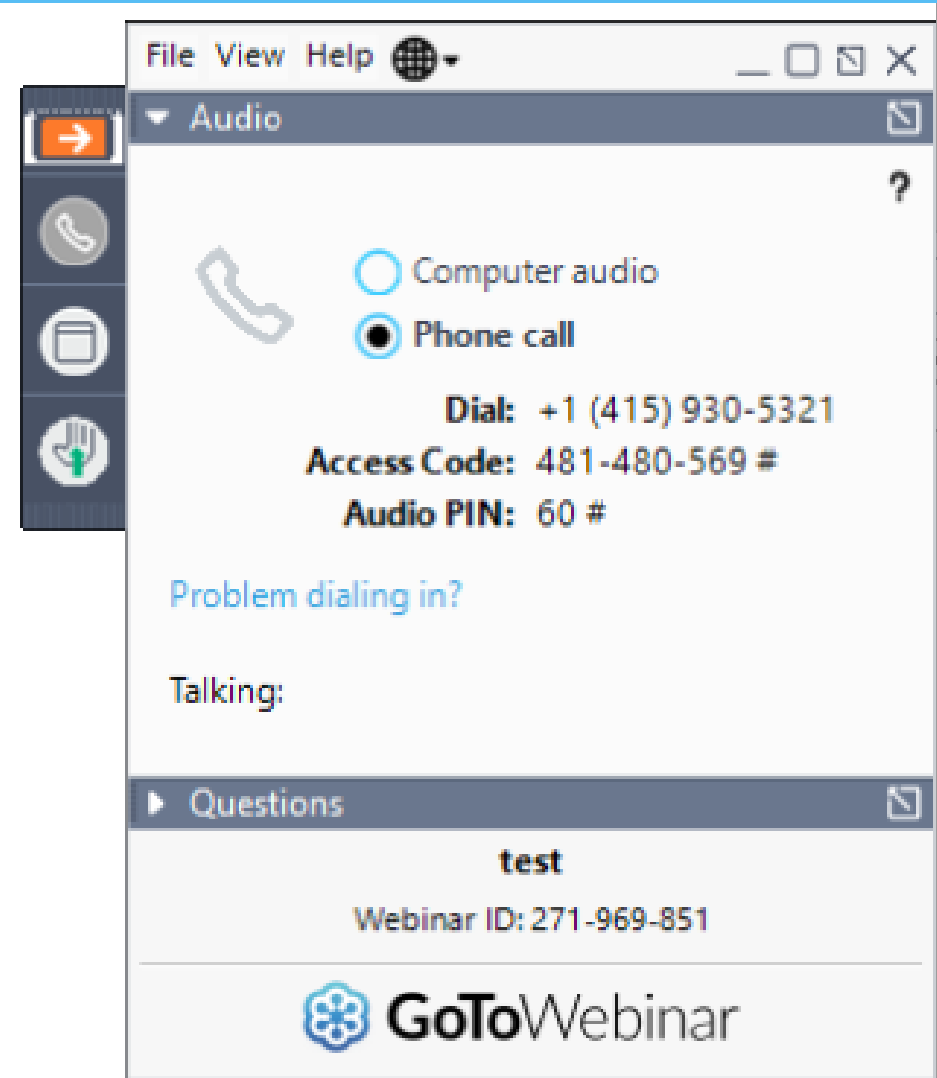
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Using GoToWebinar

Go to Webinar Control Panel

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

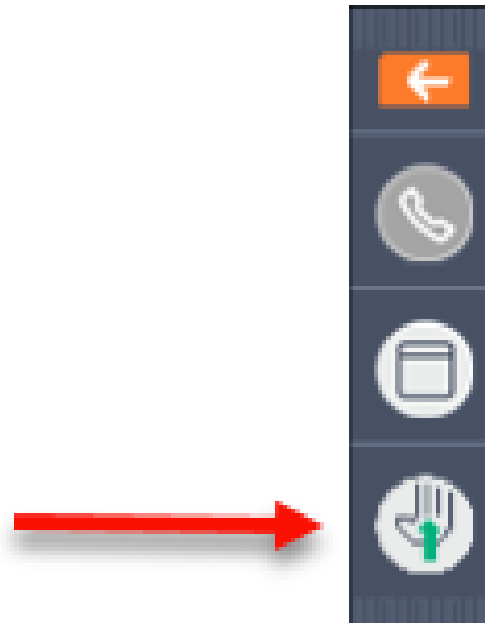


Communicating with Presenter

- * 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

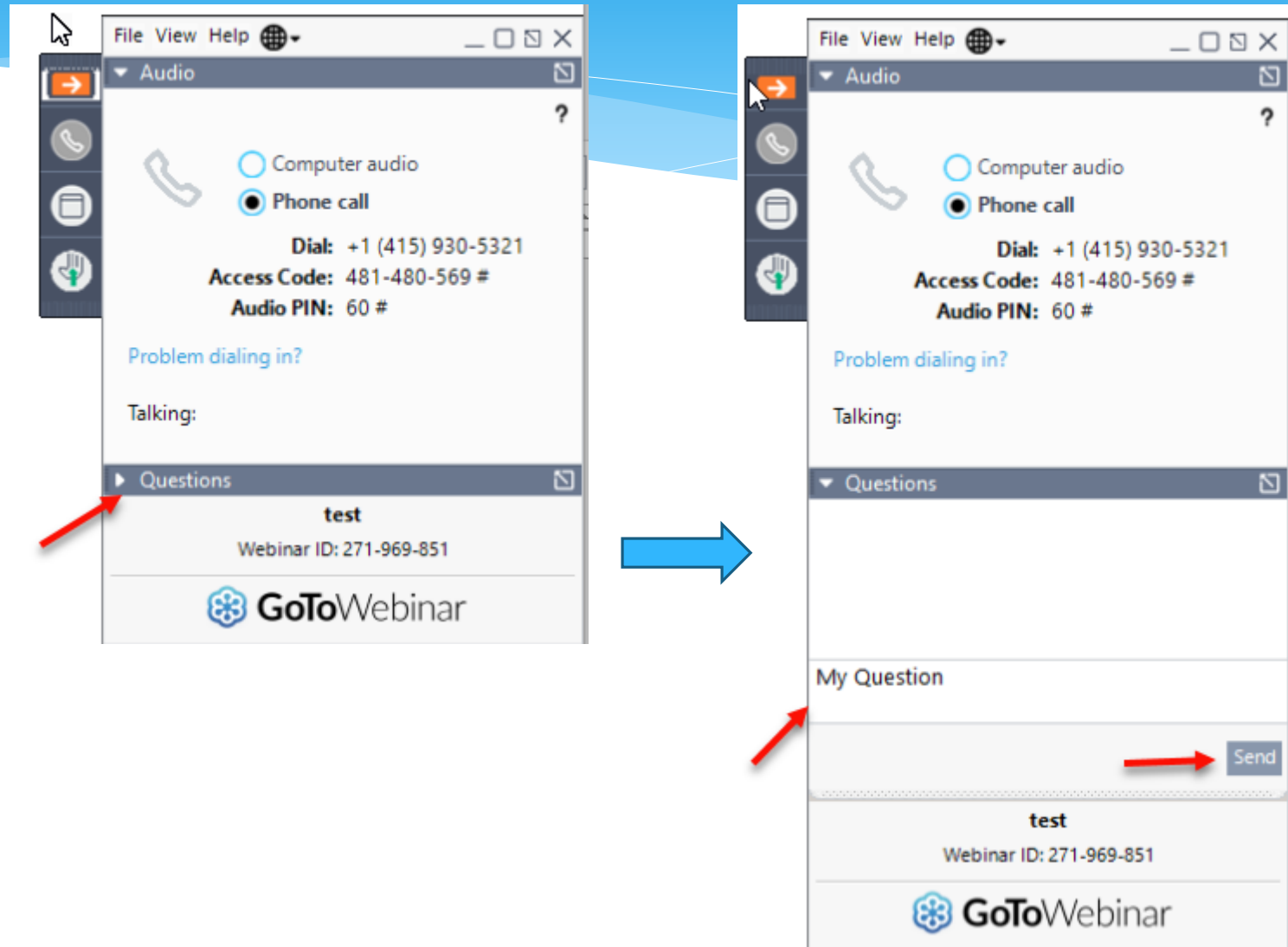
Raising your hand

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

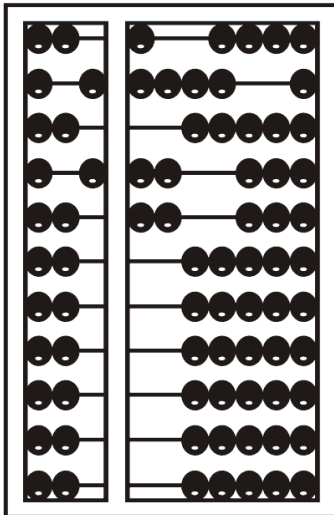


Typing in a Question

- * 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



Hello, kkr . You are currently logged in for **ADMIN** (Logout)

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[Home](#) [Activities](#) [IEP](#) [eSTACs](#) [Attendance](#) [Billing](#) [Lookup](#) [Documents](#) [Reports](#) [Maintenance](#) [Medicaid Service Bureau](#) [Medicaid](#) [People](#) [My Account](#) [Knowledge Base](#)

User Profile

Hide

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

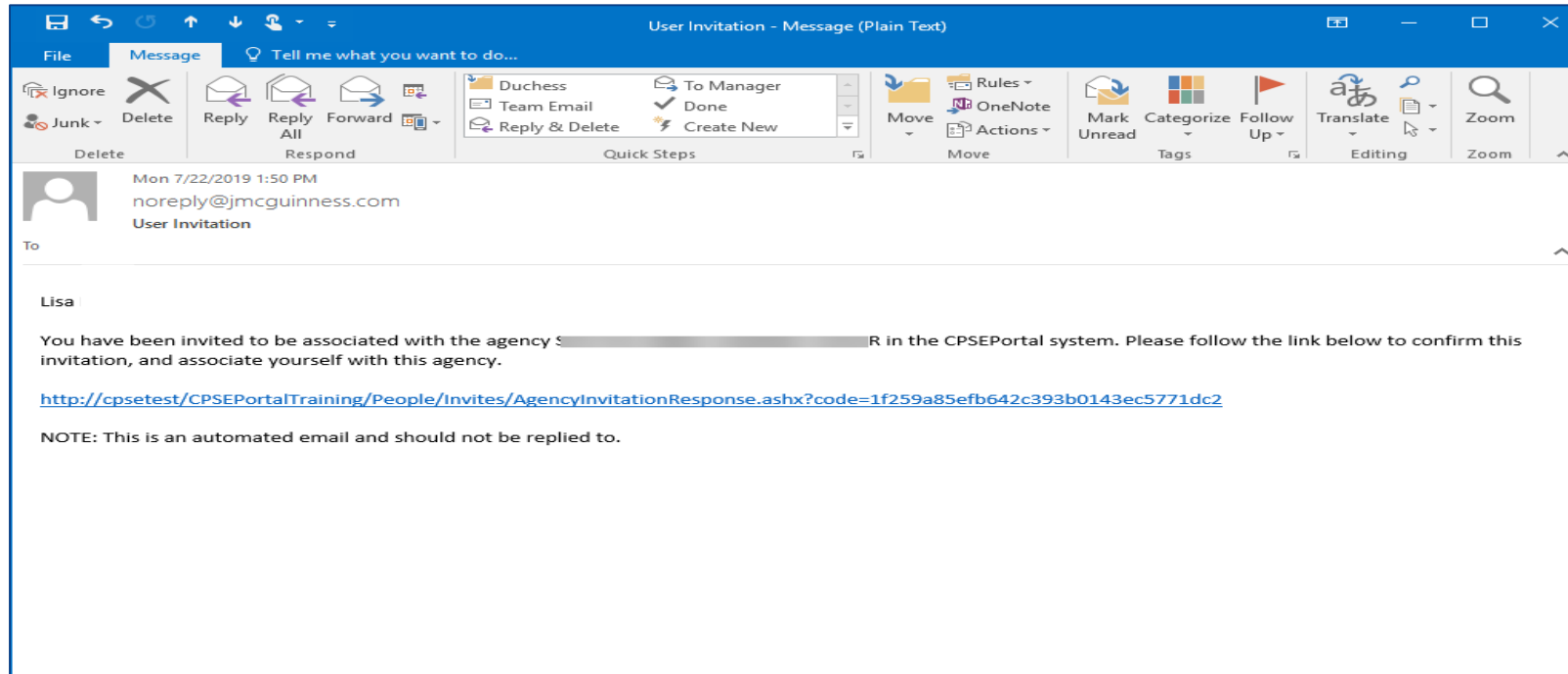
© James McGuinness & Associates

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.

The screenshot shows the 'CPSE Portal 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, there are links for 'Home' and 'Knowledge Base'. The main content area is titled 'CPSEPortal Invitation' and contains the following sections:

- Name Confirmation - Confirm this information is correct.** This section has fields for 'First Name' and 'Last Name'. Red arrows point to these fields.
- Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.** This section has fields for 'NPI', 'Profession', 'NYS License Number', and 'Signature, Title, and Credentials (e.g. Mary Brown, CCC-SLP)'. Red arrows point to the 'NPI', 'Profession', and 'NYS License Number' fields. A yellow arrow points to the 'Signature, Title, and Credentials' field.
- Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.** This section has an 'Email' field. A yellow arrow points to this field.
- User Account Information** This section has fields for 'Username', 'Password', and 'Confirm Password'. Yellow arrows point to the 'Username', 'Password', and 'Confirm Password' fields.

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

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.

Billing Provider Profile

Provider Info

User Information

Billing Provider
Name

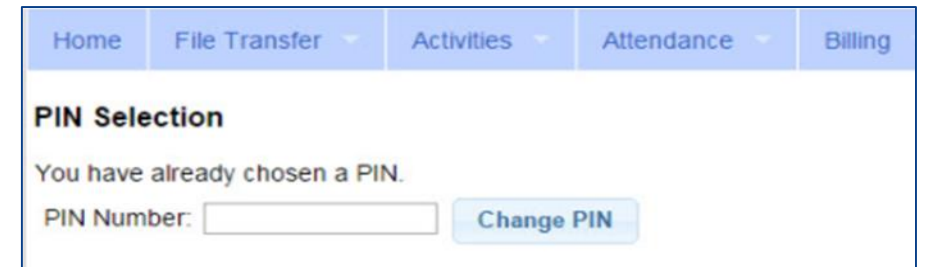
Billing Address
Address 1
Address 2
City State Zip
Phone Number

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			

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>



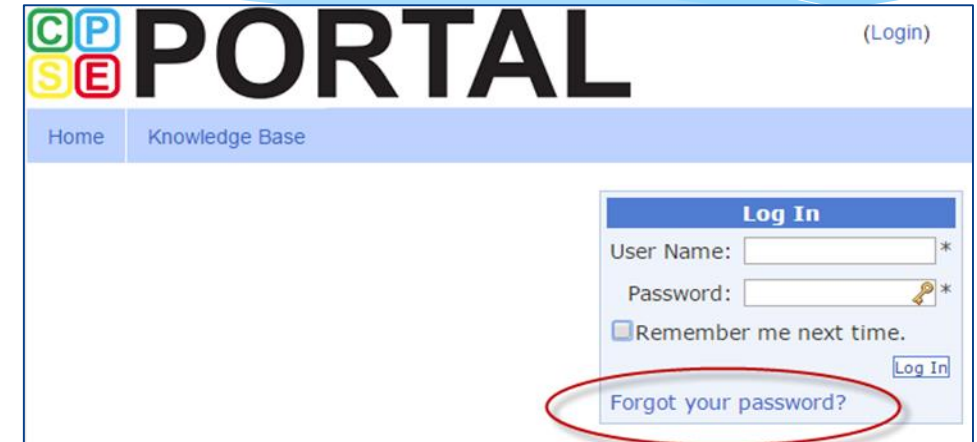
The screenshot shows a web interface with a navigation bar at the top containing links: Home, File Transfer, Activities, Attendance, and Billing. Below the navigation bar is a section titled "PIN Selection". Inside this section, it says "You have already chosen a PIN." followed by a label "PIN Number:" and an empty text input field. To the right of the input field is a button labeled "Change PIN".



The screenshot shows a "Password Verification" dialog box. It has a title bar with the text "Password Verification" and a close button (X). The main text inside says "For additional security, please re-enter your login password." Below this text is a label "Password" followed by an empty text input field. To the right of the input field is a button labeled "Proceed".

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.

Log In

Forgot your password?



Password Recovery

Forgot Your Password?

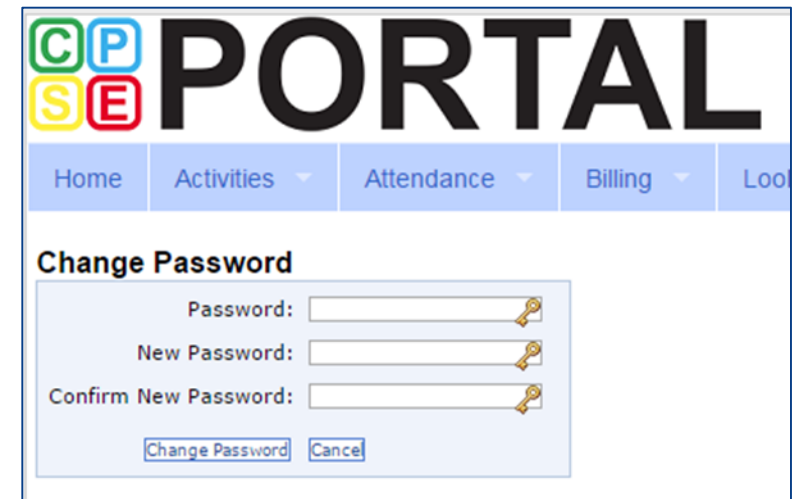
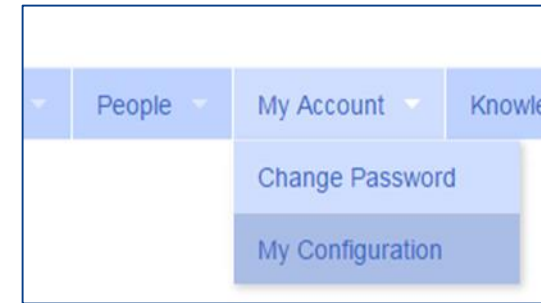
Enter your User Name to receive your password.

User Name:

Submit

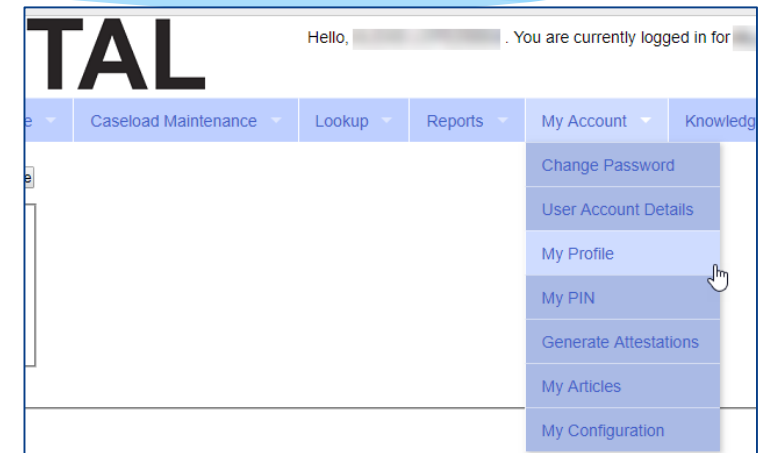
Changing Your Password

- * 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 CPSE Portal's 'Change Password' page. The page has a header with the CPSE logo and the word 'PORTAL'. Below the header is a navigation bar with links: Home, Activities, Attendance, Billing, and Logout. The main content area is titled 'Change Password' and contains three password input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a small key icon to its right. At the bottom of the form are two buttons: 'Change Password' and 'Cancel'.

Edit My User Information

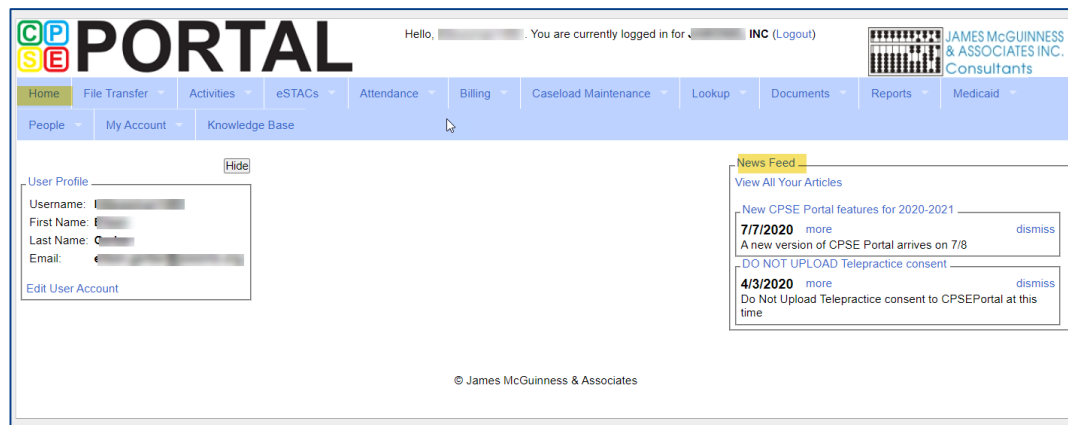
- * My Profile: My Account>My Profile & click on “User Information” tab.
- * This screen may be used to update user name and/or email address.
- * Click “Update” and you will receive the following message: User Information Updated Successfully
- * My Profile:
 - * <http://support.cpseportal.com/kb/a59/edit-my-user-information.aspx?KBSearchID=16250>

A screenshot of the "My Profile" page. The page has a title "My Profile" and three tabs: "Personal and Professional", "User Information", and "Favorites". The "User Information" tab is selected. Below the tabs is a form with the following fields: "Username", "Last Name", "First Name", and "Email". Each field has a text input box. At the bottom of the form is an "Update" button.

News Feed / My Articles

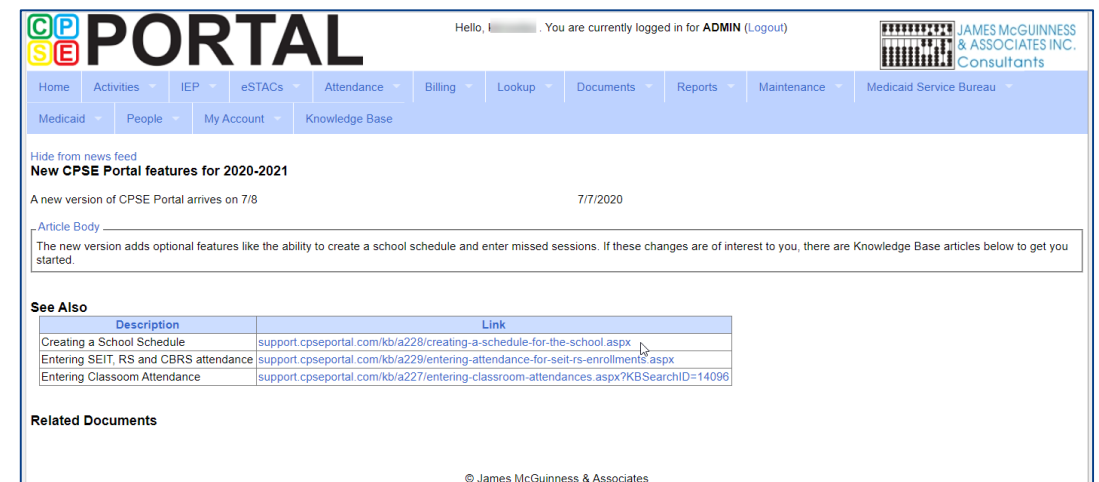
News Feed contains current articles and updates to the Portal. News Feed can be found in 2 ways.

Your current News Feed will be located on your Home Page



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. A secondary bar includes People, My Account, and Knowledge Base. On the left, there is a User Profile section with fields for Username, First Name, Last Name, and Email, along with an Edit User Account link. On the right, the News Feed section is visible, showing a list of articles with dates and links to view more or dismiss them. The footer indicates the portal is powered by James McGuinness & Associates.

For all News Feed articles:
My Account\My Articles\View

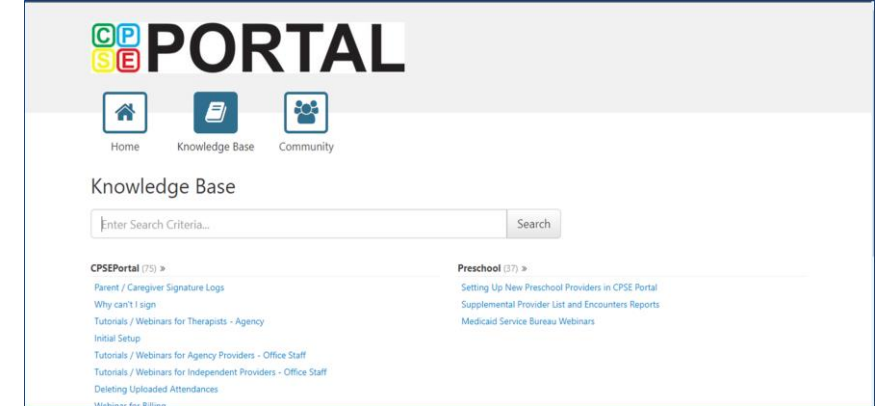


The screenshot shows the CPSE Portal My Account\My Articles\View page. The top navigation bar is identical to the Home Page. The main content area displays a list of articles under the heading 'New CPSE Portal features for 2020-2021'. The first article is dated 7/7/2020 and describes a new version of the CPSE Portal arriving on 7/8. Below this, there is a 'See Also' section with a table of related articles and links. The footer indicates the portal is powered by James McGuinness & Associates.

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

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/469569945585063180>
- 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