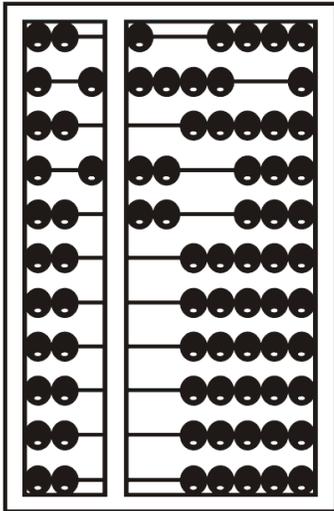


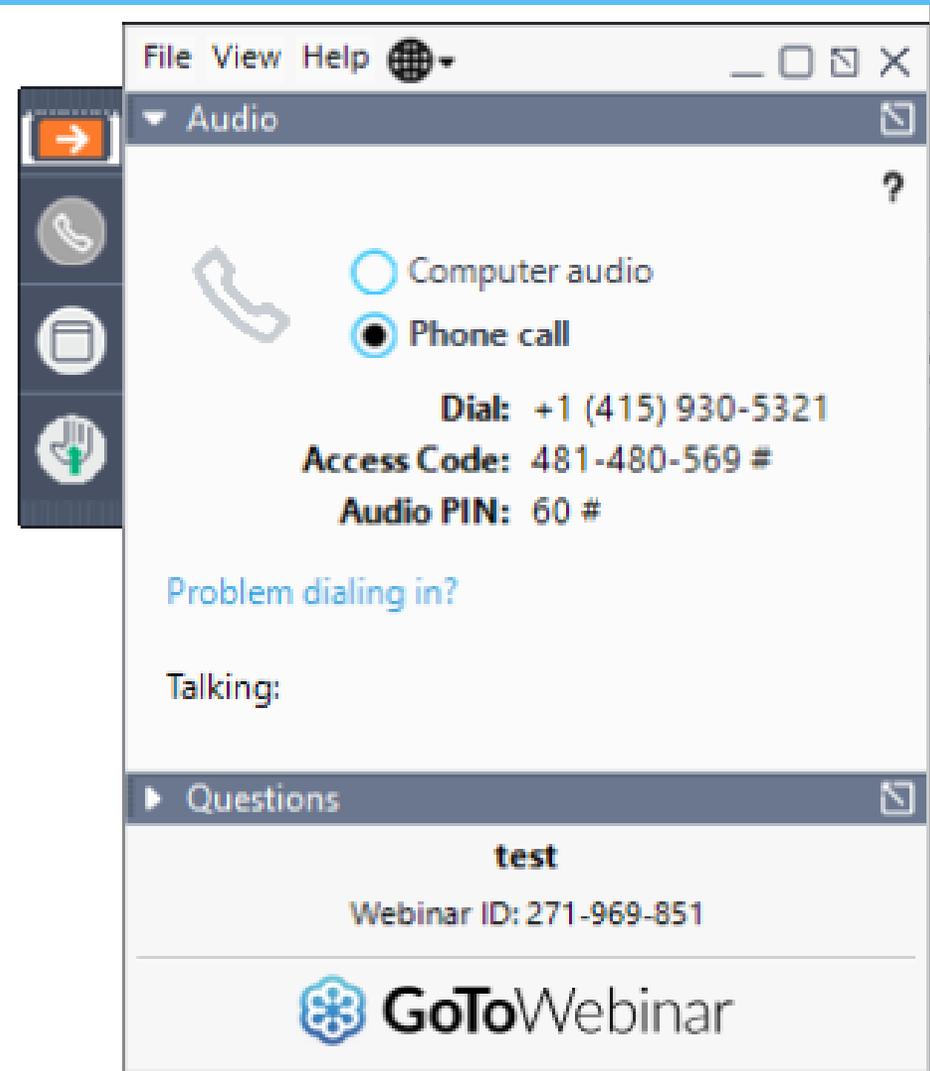
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Using GoToWebinar

Go to Webinar Control Panel

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

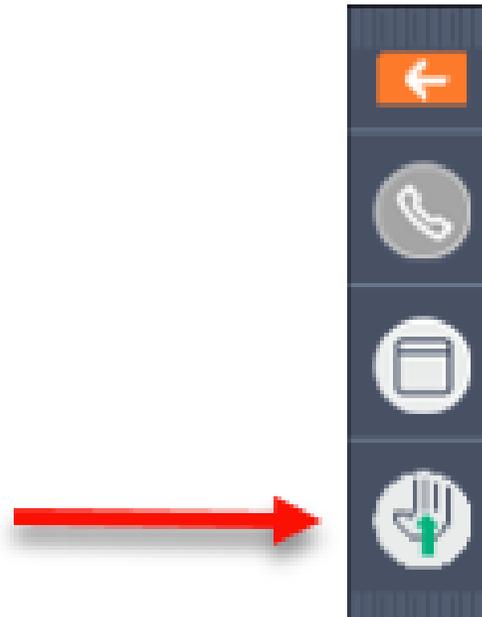


Communicating with Presenter

- * 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

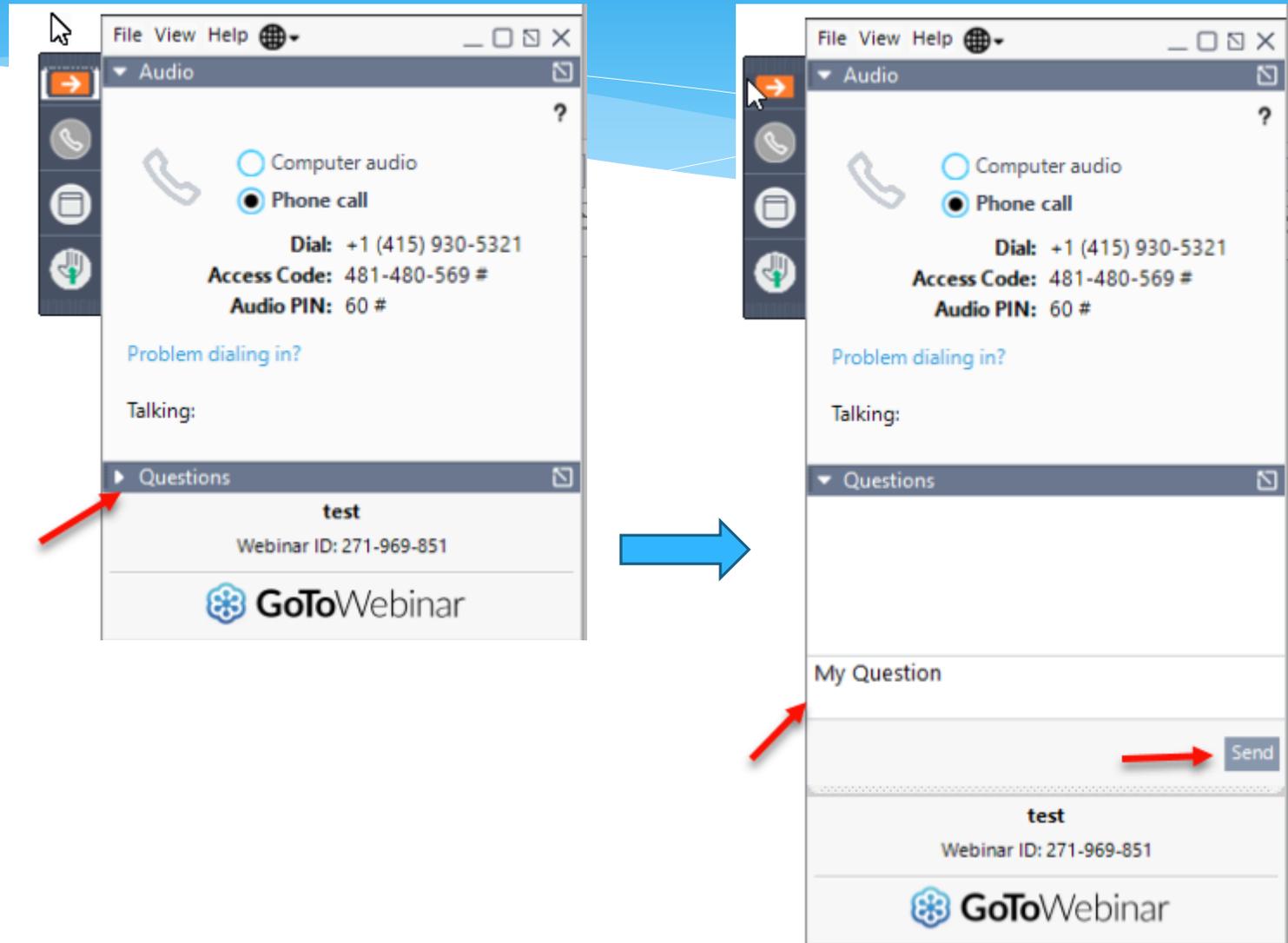
Raising your hand

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

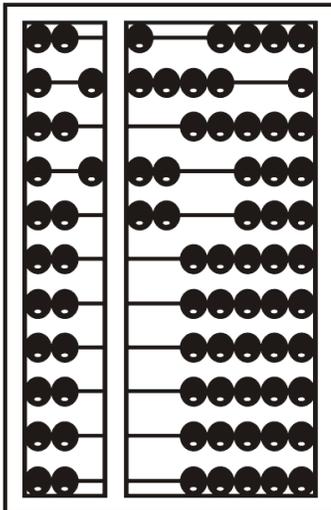


Typing in a Question

- * 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 [redacted]. You are currently logged in for **ADMIN** (Logout)



- 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](#)

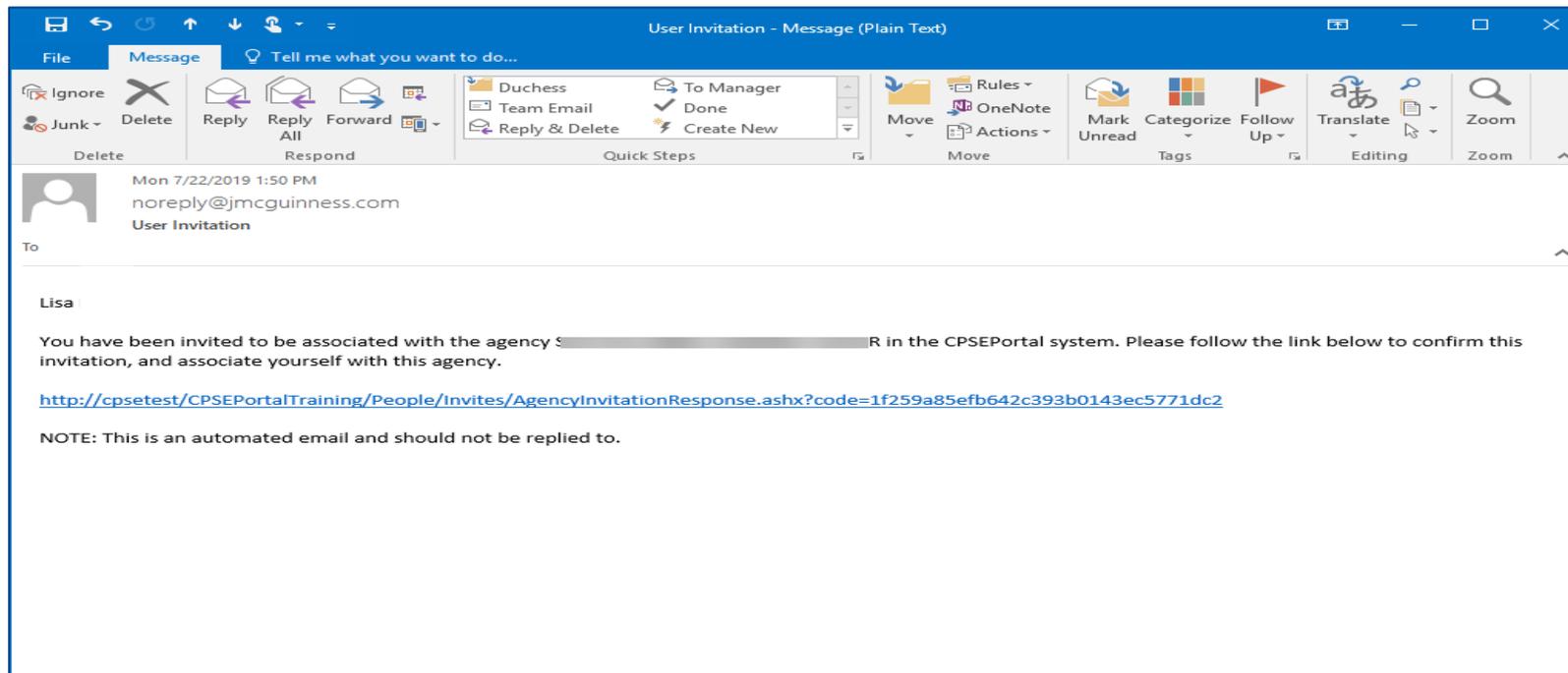
A new version of CPSE Portal arrives on 7/8

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 CPSEPortal Invitation form. At the top left is the CPSE logo and the word "PORTAL". At the top right is a "(Login)" link and the logo for JAMES MCGUINNESS & ASSOCIATES INC. Consultants. Below the header is a navigation bar with "Home" and "Knowledge Base" links. The main content area is titled "CPSEPortal Invitation" and contains the following sections:

- Name Confirmation - Confirm this information is correct.** Fields for "First Name" and "Last Name" are shown with red arrows pointing to them.
- Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.** Fields for "NPI", "Profession" (with "OT - Licensed Occupational Therapist (062)" selected), "NYS License Number", and "Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP)" are shown. Red arrows point to the "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.** An "Email" field is shown with a yellow arrow pointing to it.
- User Account Information** Fields for "Username", "Password", and "Confirm Password" are shown. Yellow arrows point to the "Username", "Password", and "Confirm Password" fields.

At the bottom of the form is a blue "Accept Invitation" button. The footer 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 NY Zip
Phone Number

Update

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

NPI This NPI is for an

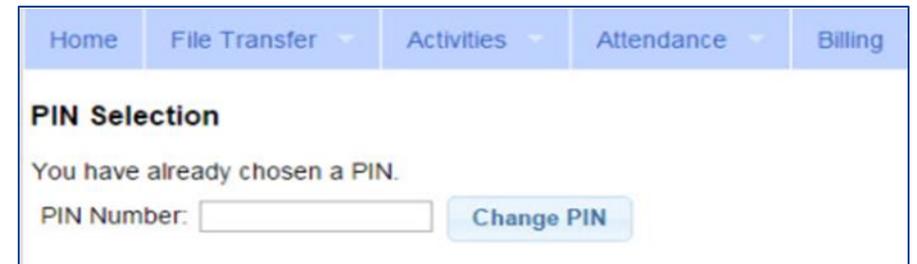
Organization Name

Mailing Address 1
Mailing Address 2
City State NY Zip

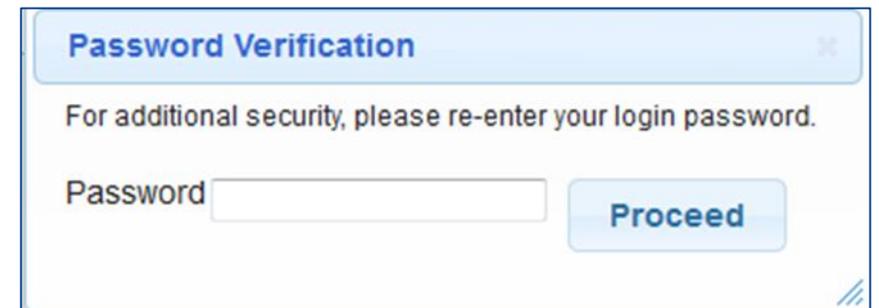
Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	252Y00000X	Agencies	Early Intervention Provider Agency			

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>



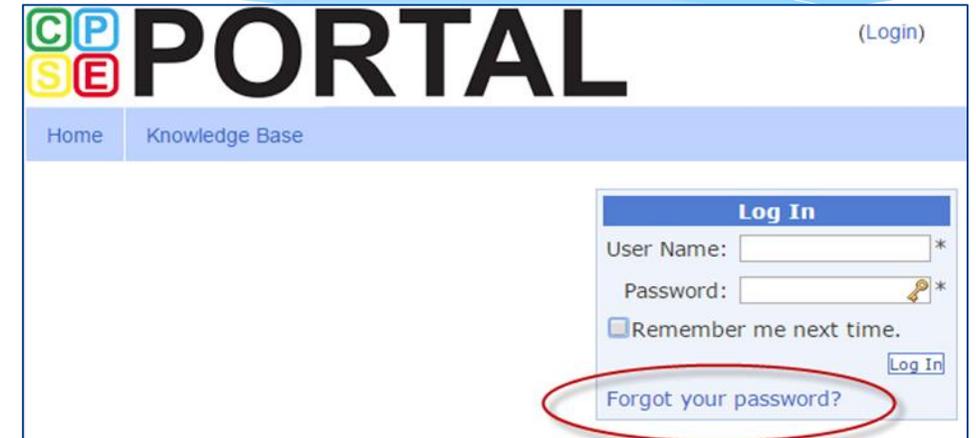
The screenshot shows a web interface with a navigation bar at the top containing links for Home, File Transfer, Activities, Attendance, and Billing. Below the navigation bar is a section titled "PIN Selection". The text in this section reads "You have already chosen a PIN." Below this text is a label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



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

[Forgot your password?](#)



Password Recovery

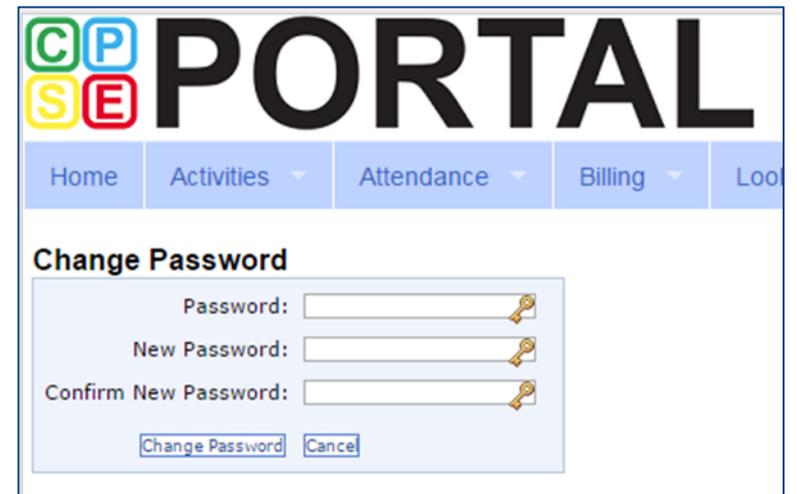
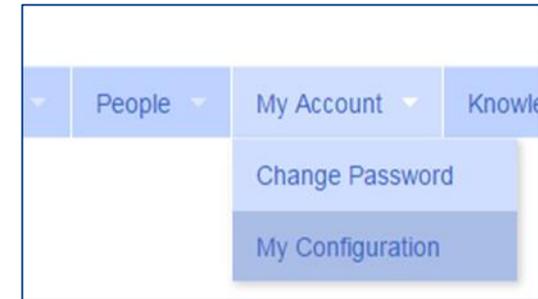
Forgot Your Password?

Enter your User Name to receive your password.

User Name:

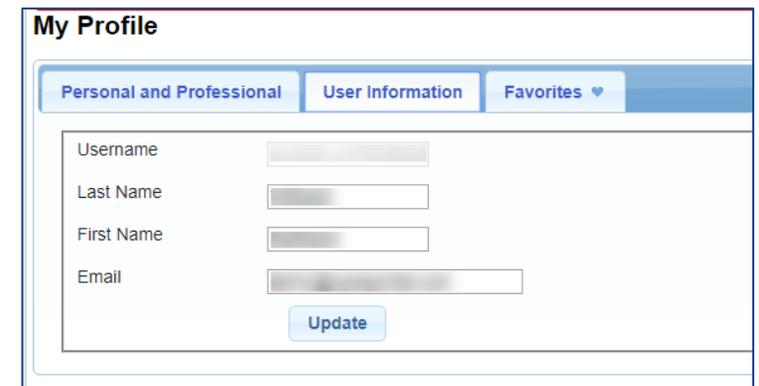
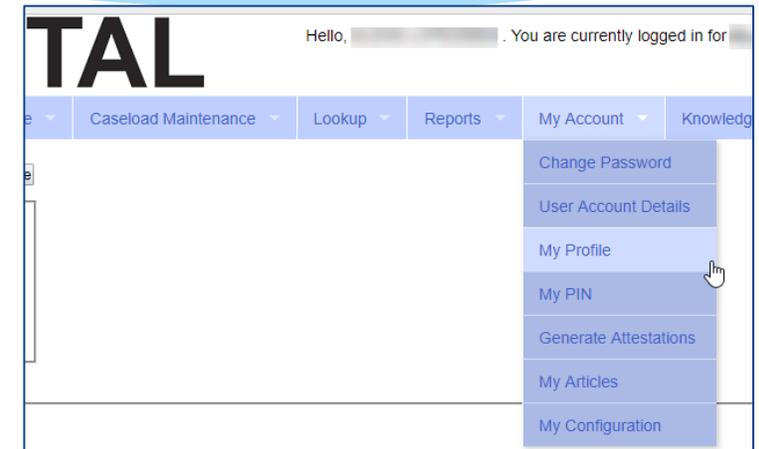
Changing Your Password

- * 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 CPSE PORTAL website's 'Change Password' form. The form is titled 'Change Password' and contains three password input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a key icon to its right. At the bottom of the form, there are two buttons: 'Change Password' and 'Cancel'. The website's header includes the CPSE PORTAL logo and a navigation bar with links for Home, Activities, Attendance, Billing, and Login.

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>

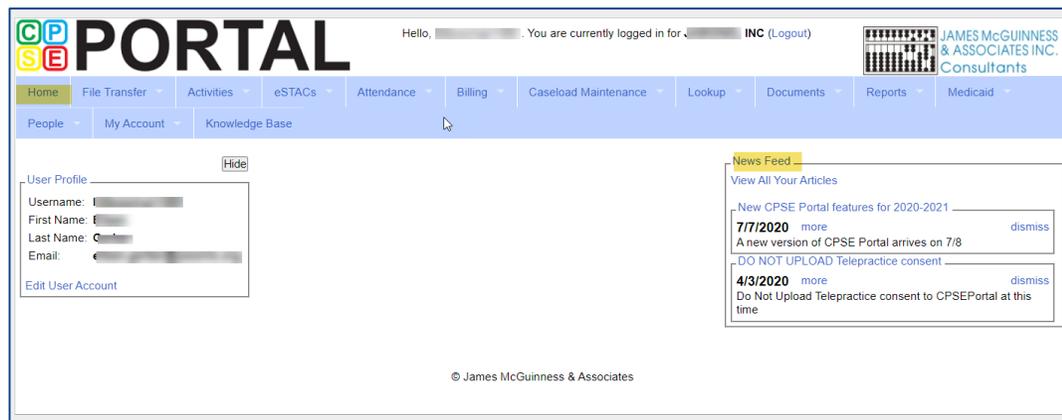
A screenshot of the 'My Profile' user information form. The form has three tabs: 'Personal and Professional', 'User Information', and 'Favorites'. The 'User Information' tab is selected. The form contains four input fields: 'Username', 'Last Name', 'First Name', and 'Email'. Below the fields is an 'Update' 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

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. A secondary navigation 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 highlighted, showing a list of articles with dates and links to view more or dismiss.

CPSE PORTAL

Hello, [User Name]. You are currently logged in for [User Name] INC (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 [Hide]

Username: [Redacted]
First Name: [Redacted]
Last Name: [Redacted]
Email: [Redacted]
Edit User Account

News Feed

View All Your Articles

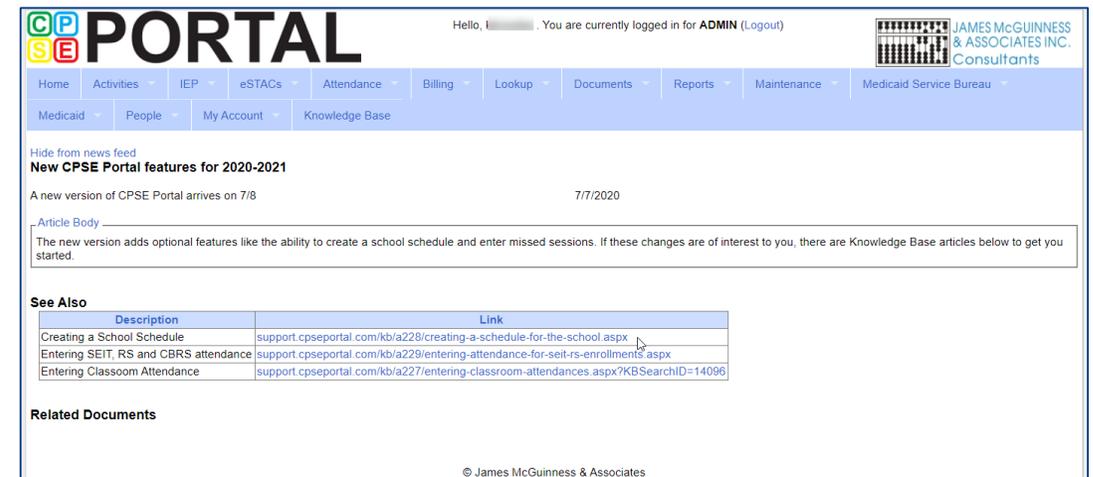
New CPSE Portal features for 2020-2021

7/7/2020 more dismiss
A new version of CPSE Portal arrives on 7/8

DO NOT UPLOAD Telepractice consent

4/3/2020 more dismiss
Do Not Upload Telepractice consent to CPSEPortal at this time

© James McGuinness & Associates



The screenshot shows the CPSE Portal My Account\My Articles\View page. The top navigation bar includes links for Home, Activities, IEP, eSTACs, Attendance, Billing, Lookup, Documents, Reports, Maintenance, and Medicaid Service Bureau. A secondary navigation bar includes Medicaid, People, My Account, and Knowledge Base. The main content area shows a list of articles with dates and links to view more or dismiss. Below the list, there is a 'See Also' section with a table of related articles and a 'Related Documents' section.

CPSE PORTAL

Hello, [User Name]. 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 from news feed

New CPSE Portal features for 2020-2021

A new version of CPSE Portal arrives on 7/8 7/7/2020

Article Body

The new version adds optional features like the ability to create a school schedule and enter missed sessions. If these changes are of interest to you, there are Knowledge Base articles below to get you started.

See Also

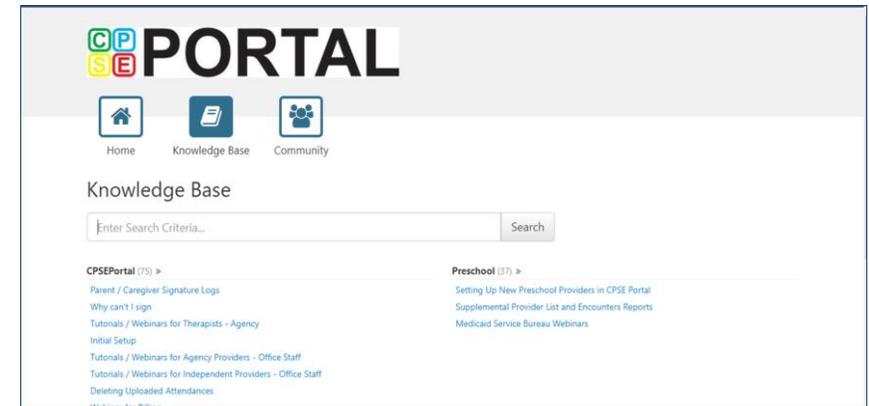
Description	Link
Creating a School Schedule	support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx
Entering SEIT, RS and CBRS attendance	support.cpseportal.com/kb/a229/entering-attendance-for-seit-rs-enrollments.aspx
Entering Classroom Attendance	support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=14096

Related Documents

© James McGuinness & Associates

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