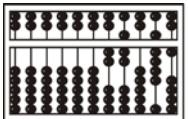


CPSE Portal

Introduction to initial setup for Agencies



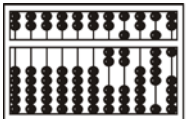
JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Webinar Getting Started

CPSE Portal is located at

<https://www.cpseportal.com/>

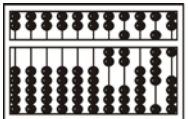


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Webinar Outline

- ▶ Support Resources
- ▶ Agency Setup
- ▶ Users Types
- ▶ Invitations

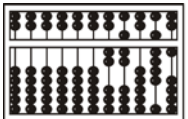


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

 **PORTAL**

Resources

- ▶ Email support@CPSEPortal.com
- ▶ CPSE Portal support site <http://support.cpseportal.com>
 - ▶ Knowledge Base Articles
- ▶ Knowledge Base Menu from www.CPSEPortal.com

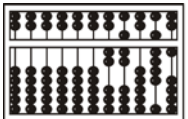


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Billing Provider vs. Service Provider

- ▶ A Billing Provider (think Agency or School)
 - ▶ Can be an individual or corporation
 - ▶ Has a vendor contract with the County
 - ▶ Submits bills to County
 - ▶ Receives payment from County
- ▶ A Service Provider (think therapist)
 - ▶ Is an individual
 - ▶ Provides the services to the child

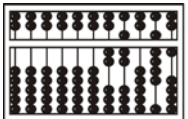


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

C P
S E **PORTAL**

Agency is the primary link between CPSE Portal and service providers

- ▶ We cannot individually train/support the thousands of therapists and teachers that use CPSE Portal
- ▶ Service Providers should attend webinars
- ▶ If they can't attend, they should watch recorded webinars
- ▶ They should look for answers on the Knowledge Base

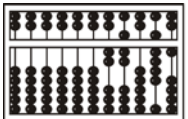


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Billing Provider Account

- ▶ Initially, each contracted provider will be set up with Billing Provider admin Account to login to CPSE Portal
- ▶ This admin account is used to register other users that can access CPSE Portal under their provider.



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

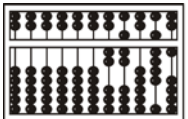
Provider Setup Form

- ▶ Only 1 per agency needed
- ▶ Not necessary for additional counties

Setup for Agency / School

User information for CPSEPortal administrative user

Organization Name	
Organization NPI	
12 digit SED Code (if applicable)	
Primary Contact First Name	
Primary Contact Last Name	
Primary Contact Email	
Primary Contact Phone	

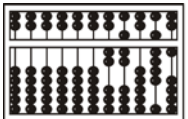
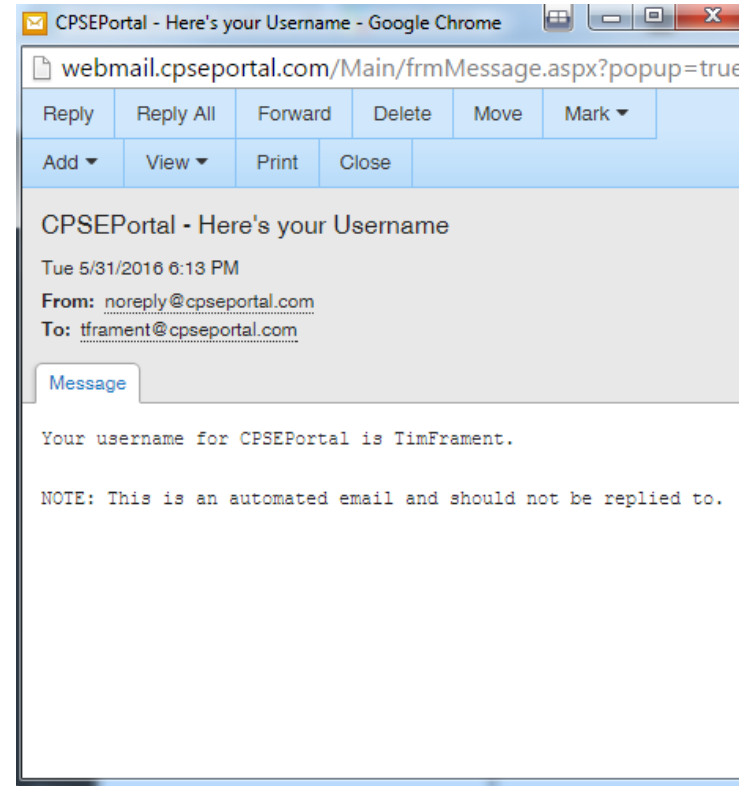
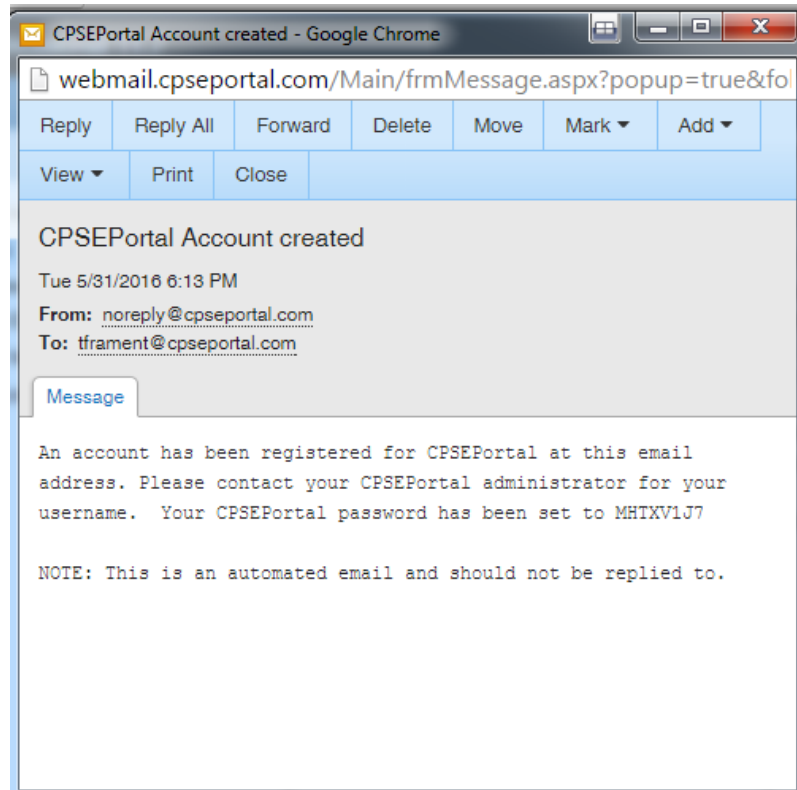


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Username and Password emails

- ▶ Two emails, one with username one with password
- ▶ Both come from NoReply@CPSEPortal.com

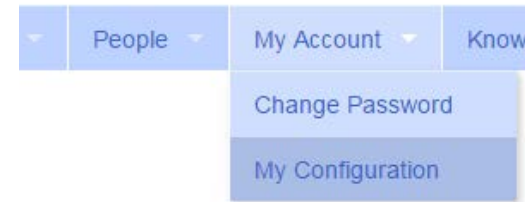


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

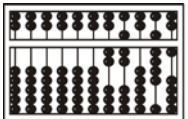
CP
SE
PORTAL

Changing Your Password

- ▶ Navigate to the My Account->Change Password page



- ▶ Enter the your current password in the Password field
- ▶ Enter your New Password
- ▶ Re-enter your New Password to confirm it was entered correctly

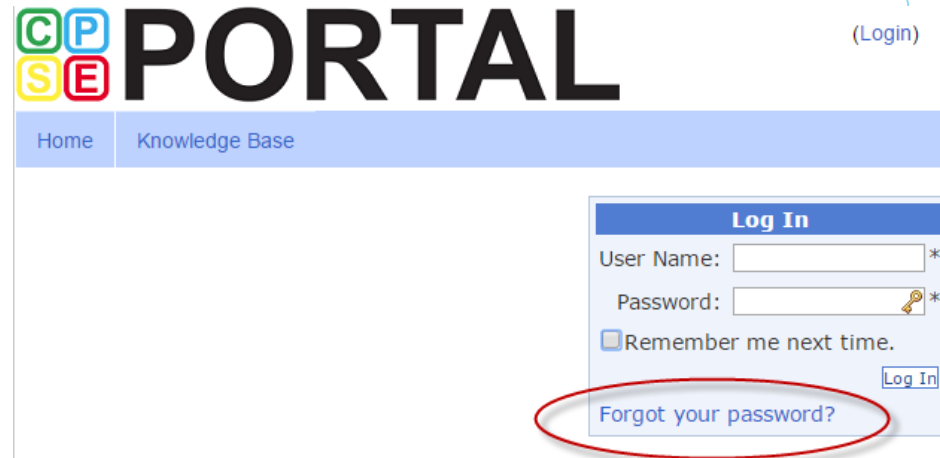
A screenshot of the 'Change Password' form in the CPSE PORTAL. The form has three input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a key icon to its right. Below the fields are two buttons: 'Change Password' and 'Cancel'. The form is titled 'Change Password' in bold.

JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



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.



CPSE PORTAL (Login)

Home Knowledge Base

Log In

User Name: *

Password: *

☐ Remember me next time.

[Forgot your password?](#)

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

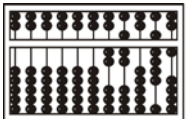
Password Recovery



Forgot Your Password?

Enter your User Name to receive your password.

User Name:



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Billing Provider Profile (NPI Registry)

- ▶ Navigate to My Account->Billing Provider Profile



Billing Provider Profile

NPI Registry **User Information** **PIN**

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

NPI

This NPI is for an

First Name

Last Name

Credentials

Organization Name

Mailing Address 1

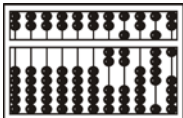
Mailing Address 2

City

State

Zip

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



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Billing Provider Profile (User Information)

- ▶ Information about currently logged in user

Billing Provider Profile

NPI Registry **User Information** **PIN**

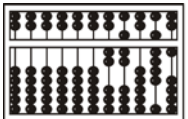
Username

Last Name

First Name

Email

Update

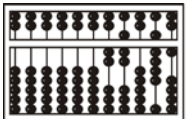


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

**CP
SE** PORTAL

Adding Additional Users for your Agency

- ▶ Adding users is done by inviting them to join CPSE Portal for your Agency
- ▶ Types of provider users
 - ▶ Billing Provider / Office Staff
 - ▶ Admin (management/administrators) ... can submit vouchers on behalf of Agency
 - ▶ Basic (clerical / billing staff)
 - ▶ Service Provider (therapist, teacher, etc.)
 - ▶ Supervisor (UDO/USO)
 - ▶ QA Supervisor

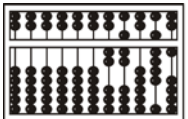
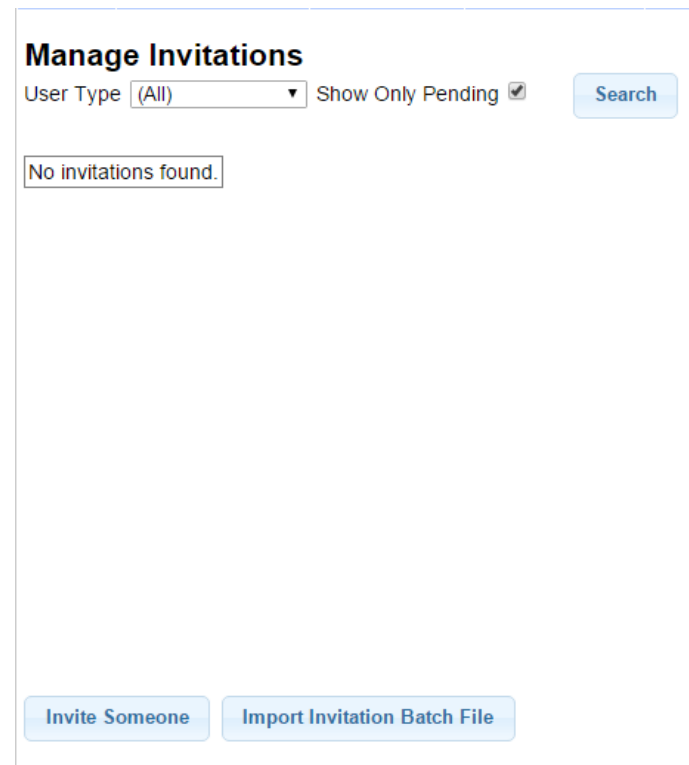


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Invitations

- Use menu option People->Invitations

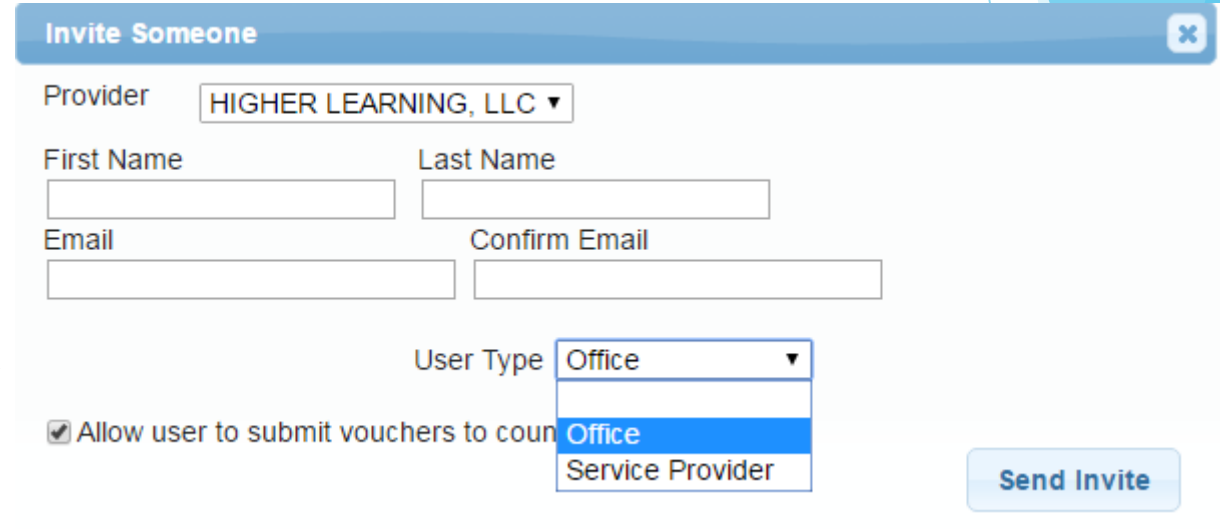


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

C P
S E **PORTAL**

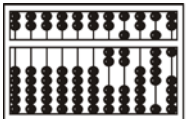
Inviting other billing provider users

- ▶ Click “Invite Someone”
- ▶ Enter First and Last Name
- ▶ Enter email and re-enter to confirm
- ▶ Select “Office” vs. “Service Provider”
- ▶ Click Send Invite



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 options:

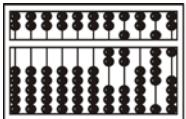
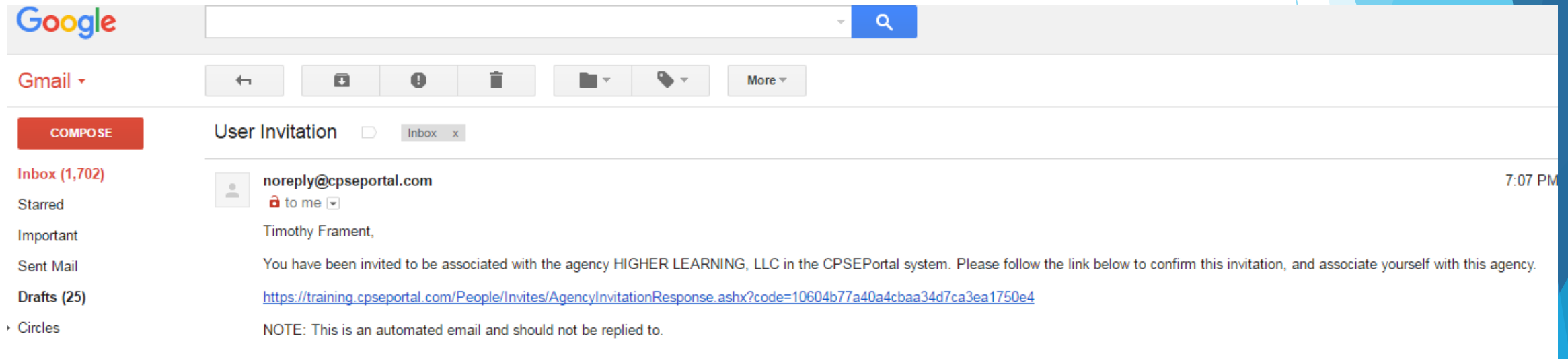
- Provider:** A dropdown menu currently showing "HIGHER LEARNING, LLC".
- First Name:** An empty text input field.
- Last Name:** An empty text input field.
- Email:** An empty text input field.
- Confirm Email:** An empty text input field.
- User Type:** A dropdown menu with "Office" selected. The dropdown is open, showing "Office" and "Service Provider" as options.
- Allow user to submit vouchers to coun:** A checkbox that is checked.
- Send Invite:** A button located at the bottom right of the form.



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPE PORTAL

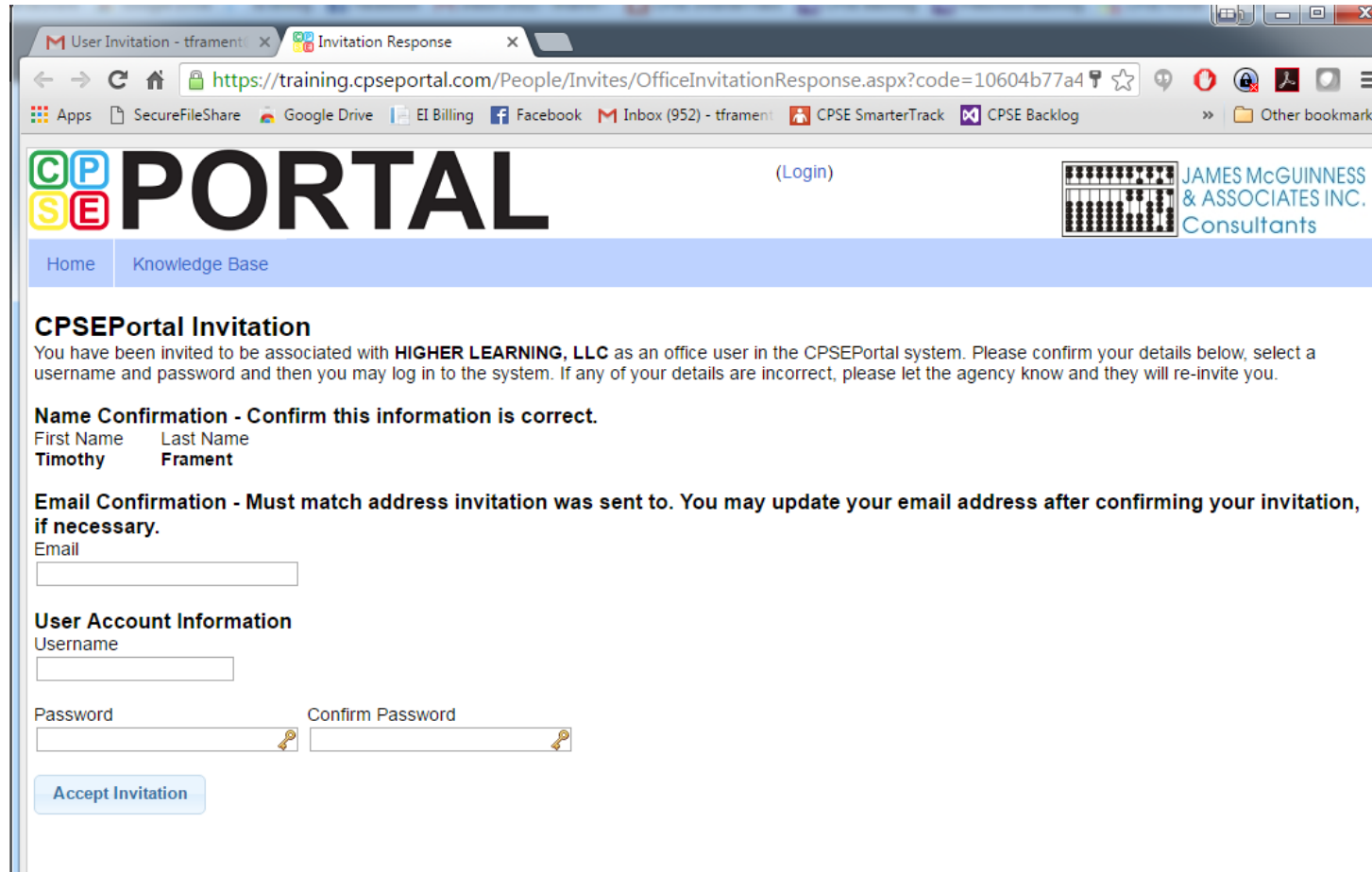
Invitation Email



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants



Accepting the Invitation



The screenshot shows a web browser window with the URL <https://training.cpseportal.com/People/Invites/OfficeInvitationResponse.aspx?code=10604b77a4>. The browser's address bar and tabs are visible. The page header includes the CPSEPortal logo, a (Login) link, and the name JAMES McGUINNESS & ASSOCIATES INC. Consultants. Below the header, there are navigation links for Home and Knowledge Base. The main content area is titled "CPSEPortal Invitation" and contains the following text: "You have been invited to be associated with HIGHER LEARNING, LLC 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." Below this text, there are three sections: "Name Confirmation - Confirm this information is correct." with fields for First Name (Timothy) and Last Name (Frament); "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; and "User Account Information" with fields for Username, Password, and Confirm Password. An "Accept Invitation" button is located at the bottom of the form.

User Invitation - tframent x Invitation Response x

← → ↻ 🏠 <https://training.cpseportal.com/People/Invites/OfficeInvitationResponse.aspx?code=10604b77a4> ☆ 🔍

Apps SecureFileShare Google Drive EI Billing Facebook Inbox (952) - tframent CPSE SmarterTrack CPSE Backlog >> Other bookmarks

CPSE PORTAL (Login) JAMES McGUINNESS & ASSOCIATES INC. Consultants

Home Knowledge Base

CPSEPortal Invitation

You have been invited to be associated with **HIGHER LEARNING, LLC** 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
Timothy Frament

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

Email

User Account Information

Username

Password Confirm Password

Accept Invitation

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

User Account Information

Username

 ⚠ Taken

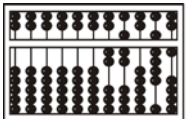
- ▶ If your preferred username is unavailable, try again until you find an available one

User Account Information

Username

 ✅ Available

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

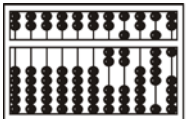


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

C P
S E **PORTAL**

Service Providers for Multiple Billing Providers

- ▶ A single Service Provider (therapist) may be associated with multiple Billing Providers
- ▶ Works for multiple agencies
- ▶ Works for agency and is also independent
- ▶ User has one username (logon)
- ▶ Permissions and activities are restricted by roles for that agency



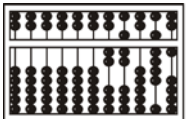
JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

 **PORTAL**

The logo features the letters 'C', 'P', 'S', and 'E' in a 2x2 grid, each inside a colored square (green, blue, yellow, and red respectively). To the right of this grid is the word 'PORTAL' in a large, bold, black sans-serif font.

Inviting Service Providers

- ▶ Use menu option People->Invitations
- ▶ You can invite them individually (Similar to inviting office users)
- ▶ You can also upload a spreadsheet of them. This only works for service providers with an NPI



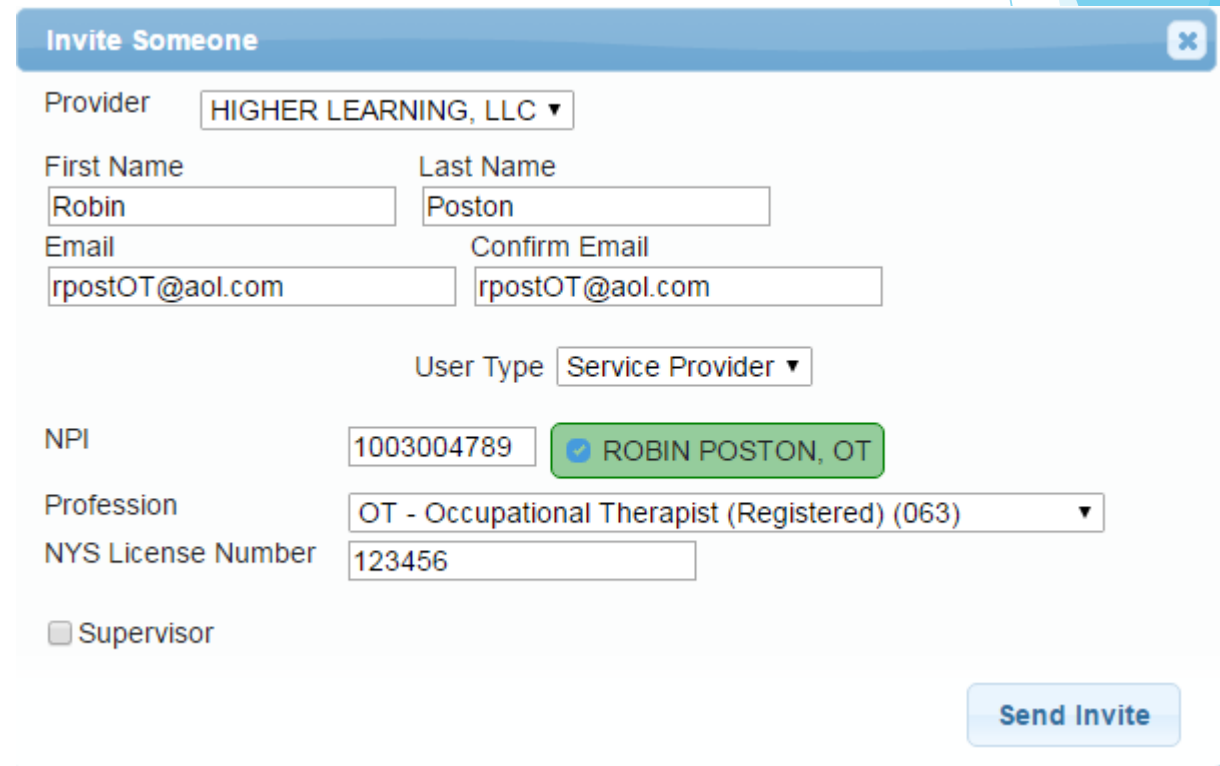
JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

 **PORTAL**

The logo features the letters 'C', 'P', 'S', and 'E' in a 2x2 grid, each inside a colored square (green, blue, yellow, red respectively). To the right of this grid is the word 'PORTAL' in a large, bold, black sans-serif font.

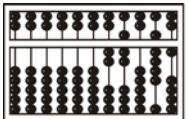
Inviting Service Providers Individually

- ▶ From the Invitations screen, click the “Invite Someone” button.
- ▶ Enter their name and email address
- ▶ Choose “Service Provider” as the user type
- ▶ NPI is extremely important. If they have one, use it. Do not skip it. It is used to make sure a person is only entered once.
- ▶ Indicate whether you want them to have UDO/USO supervisor role



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 options:

- Provider:** A dropdown menu showing "HIGHER LEARNING, LLC".
- First Name:** A text input field containing "Robin".
- Last Name:** A text input field containing "Poston".
- Email:** A text input field containing "rpostOT@aol.com".
- Confirm Email:** A text input field containing "rpostOT@aol.com".
- User Type:** A dropdown menu showing "Service Provider".
- NPI:** A text input field containing "1003004789" and a green button with a checkmark and the text "ROBIN POSTON, OT".
- Profession:** A dropdown menu showing "OT - Occupational Therapist (Registered) (063)".
- NYS License Number:** A text input field containing "123456".
- Supervisor:** A checkbox labeled "Supervisor" which is currently unchecked.
- Send Invite:** A blue button in the bottom right corner.



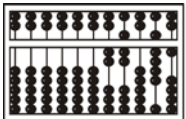
JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPE PORTAL

Inviting Service Providers via upload

- ▶ In addition to creating individual invites, you can upload a spreadsheet with the following format, which can be downloaded from the knowledgebase (<http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-users.aspx>) or (search for “template” or “invitations”).

	A	B	C	D	E	F	G
1	First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	NY License
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants



Import Invitation Batch File

- ▶ From the invitations screen, click the “Import Invitation Batch File” Button

Manage Invitations

User Type Show Only Pending ☒

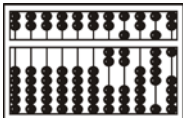
Agency Invitation Batch Import

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.

No file chosen

- ▶ Click the “Choose File” button and browse to your completed spreadsheet file and select it.
- ▶ Click the “Upload” button



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

**CP
SE** PORTAL

Preview invitations

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

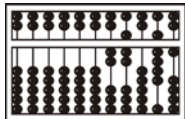
Valid Invites - Will be imported & sent

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

- ▶ Screen will show problems as well as successful imported entries.
- ▶ Click either "Accept & Send Invites" or "Decline & Cancel"

Accept & Send Invites

Decline & Cancel



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Sample invitations to provider

CPSEPortal Invitation

You have been invited to be associated with **HIGHER LEARNING, LLC** 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.

Name Confirmation - Confirm this information is correct.

First Name Last Name
Todd Blowers

Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.

NPI 1003000340
Profession SLP - Speech & Language Pathologist (058)
NYS License Number 675432
Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP)

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

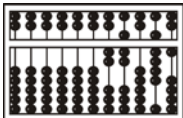
Email

User Account Information

Username

Password Confirm Password

Accept Invitation



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Sample invitations to provider (no NPI)

CPSEPortal Invitation

You have been invited to be associated with **HIGHER LEARNING, LLC** 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.

Name Confirmation - Confirm this information is correct.

First Name Last Name
Mary **Smith**

Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.

NPI **NO NPI SPECIFIED** ☐ I confirm that I have no NPI.

Profession **SPED - Special Education Teacher ()**

NYS License Number

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

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

Email

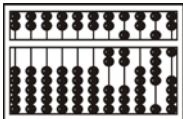
User Account Information

Username

Password

Confirm Password

Accept Invitation



**JAMES MCGUINNESS
& ASSOCIATES INC.**
Consultants

**CP
SE** **PORTAL**

Sample invitations to provider (already uses CPSEPortal)

CPSEPortal Invitation

You have been invited to be associated with **WHOLE CHILD PSYCHOLOGICAL SERVICES, PC** 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.

Name Confirmation - Confirm this information is correct.

First Name	Last Name
Todd	Blowers

Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.

NPI	1003000340
Profession	SLP - Speech & Language Pathologist (058)
NYS License Number	675432

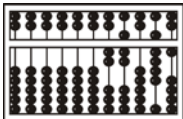
Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.

Email

You appear to already be registered with CPSEPortal

☐ By accepting this invitation, you are agreeing to associate yourself with this additional billing provider agency.

Accept Invitation



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Managing Invitations

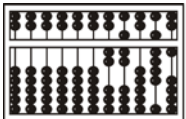
- ▶ Resend an Invitation
- ▶ See if they created the user
- ▶ Delete Invitation

Manage Invitations

User Type Show Only Pending ☒

Search

Last Name	First Name	Email	NPI	User Type	User Created	Sent		
Taft	Peter	PTaft@HigherEd.com		Office	N	05/31/2016 07:07 PM	Resend	Delete



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

C P
S E PORTAL

Viewing/changing Existing users

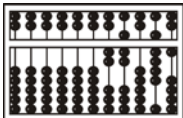
- Using the menu, navigate to People->Users



Users

Provider: HIGHER LEARNING, LLC ▼

Username	First Name	Last Name	Email	Associated Person	Service Provider	Supervisor	QA Supervisor	Basic	Billing Admin		
GILDA.HUERTA1035	GILDA	HUERTA	demo@cpseportal.com	HUERTA, GILDA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
HIGHERLEARNINGLLC_1037			demo@cpseportal.com		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
HIGHERLEARNINGLLC_1173			demo@cpseportal.com		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
HIGHERLEARNINGLLC_3440			demo@cpseportal.com		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	edit	delete
GAYLA.ALBERT1112	GAYLA	ALBERT	demo@cpseportal.com	ALBERT, GAYLA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
LISAB.BECK3460	LISABETH	BECK	demo@cpseportal.com	BECK, LISABETH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MICHE.BLANKENSHIP3585	MICHELINE	BLANKENSHIP	demo@cpseportal.com	BLANKENSHIP, MICHELINE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
tblowers	Todd	Blowers		Blowers, Todd	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MICKI.BUCK3590	MICKIE	BUCK	demo@cpseportal.com	BUCK, MICKIE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
PANSY.CARNEY1062	PANSY	CARNEY	demo@cpseportal.com	CARNEY, PANSY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete



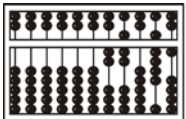
JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CP
SE
PORTAL

Editing roles / permissions

- ▶ Click the Edit link on the row you wish to change
- ▶ Change the check boxes and then click update

tblowers	Todd	Blowers	tframent@gmail.com	Blowers, Todd	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MICKI.BUCK3590	MICKIE	BUCK	demo@cpseportal.com	BUCK, MICKIE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
PANSY.CARNEY1062	PANSY	CARNEY	demo@cpseportal.com	CARNEY, PANSY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	update cancel	delete
IVORY.CHENEY3416	IVORY	CHENEY	demo@cpseportal.com	CHENEY, IVORY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
VONDA.COOLEY1061	VONDA	COOLEY	demo@cpseportal.com	COOLEY, VONDA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete



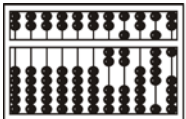
JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Removing a user after they leave the agency

- ▶ Click the Delete link on the row for that user, it deletes all permissions for that user related to your agency
- ▶ This removes them as a user going forward, but all their work remains
- ▶ If you uncheck all their permissions, that too will remove them from the list

Username	First Name	Last Name	Email	Associated Person	Service Provider	Supervisor	QA Supervisor	Basic	Billing Admin		
GILDA.HUERTA1035	GILDA	HUERTA	demo@cpseportal.com	HUERTA, GILDA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
HIGHERLEARNINGLLC_1037			demo@cpseportal.com		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
HIGHERLEARNINGLLC_1173			demo@cpseportal.com		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
HIGHERLEARNINGLLC_3440			demo@cpseportal.com		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	edit	delete
GAYLA.ALBERT1112	GAYLA	ALBERT	demo@cpseportal.com	ALBERT, GAYLA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
LISAB.BECK3460	LISABETH	BECK	demo@cpseportal.com	BECK, LISABETH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MICHE.BLANKENSHIP3585	MICHELINE	BLANKENSHIP	demo@cpseportal.com	BLANKENSHIP, MICHELINE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete

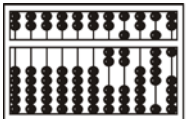


JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

**CP
SE** PORTAL

Users vs People

- ▶ “Users” are essentially a Username + Password that provides the ability to log in to the CPSE Portal
- ▶ It is possible to have a user such as “XYZOfficeAdmin” that has associated the email “office@xyz.com”
- ▶ A “Person” is the entity that has an NPI, license, provides services, etc. They show up in dropdowns for activity reports, etc.



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL

Viewing a Person's details

- ▶ On the User's list screen, click the Associated Person link to see the details.
- ▶ All the details are read only. Only the Service Provider themselves can change them

Users

Provider **HIGHER LEARNING, LLC** ▼

Username	First Name	Last Name	Email	Associated Person	Service Provider	Supervisor	QA Supervisor	Basic	Billing Admin		
GILDA.HUERTA1035	GILDA	HUERTA	demo@cpseportal.com	HUERTA, GILDA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
GEORG.CROWDER1546	GEORGIANNA	CROWDER	demo@cpseportal.com	CROWDER, GEORGIANNA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
CECIL.CUELLAR2596	CECILA	CUELLAR	demo@cpseportal.com	CUELLAR, CECILA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
ISA.CULP3403	ISA	CULP	demo@cpseportal.com	CULP, ISA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
RACHE.DAILEY2610	RACHELE	DAILEY	demo@cpseportal.com	DAILEY, RACHELE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete

Person

First Name: Last Name:

NPI:

Signature Title & Credentials:

Profession	Type	#	State	Issued	Valid Through
PT	License	011750	NY		

NPI Profile

[Click here for NPPES website](#)

NPI

This NPI is for an

First Name

Organization Name

Mailing Address 1

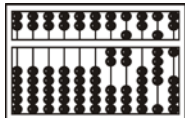
Last Name

Credentials

Mailing Address 2

City State Zip

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	2251P0200X	Respiratory, Developmental, Rehabilitative and Restorative Service Providers	Physical Therapist	Pediatrics	NY	011750

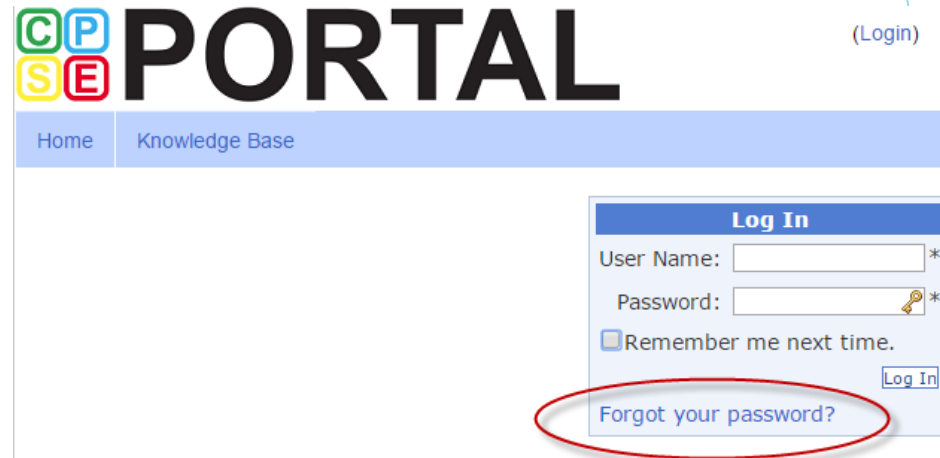


JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

**CP
SE** PORTAL

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.



CPSE PORTAL (Login)

Home Knowledge Base

Log In

User Name: *

Password: *

☐ Remember me next time.

[Forgot your password?](#)

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

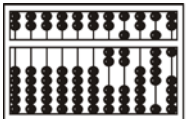
Password Recovery



Forgot Your Password?

Enter your User Name to receive your password.

User Name:

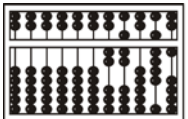
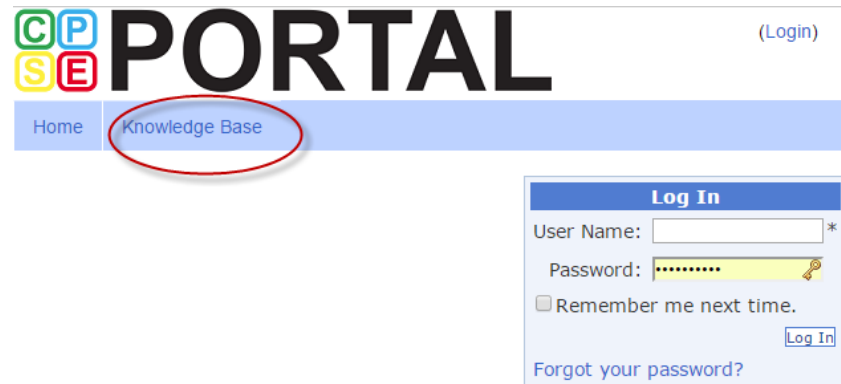


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Additional Information

- ▶ Email support@CPSEPortal.com
- ▶ CPSE Portal support site <http://support.cpseportal.com>
 - ▶ Knowledge Base Articles
- ▶ Knowledge Base Menu from www.CPSEPortal.com



JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants

CPSE PORTAL