

JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants

# Welcome to CPSE Portal Introduction

# CPSE Portal

- \* CPSE Portal is a web based system that provides a mechanism for exchanging data between the County and its providers.
- \* One component of this system is capturing session notes / treatment logs for provided services.
- \* County providers will begin using the CPSE Portal for service dates starting **July 1, 2022.**

# Purpose Of This Webinar

- \* This is not a training.
- \* We are looking to:
  - \* Provide an introduction to the system.
  - \* Communicate what the County will be using the system for.
  - \* Share the timeline for implementing the system.
  - \* Let you know what you can do to start preparing for the new system.

# Features

- \* What will functionality County vendors utilize?
  - \* Recording service providers and their credentials (NPI, license, etc.)
  - \* Entering Treatment logs for:
    - \* SEIT services
    - \* Related Services including both fee for service as well as services provided as part an approved center based preschool program
  - \* Entering attendance (Present/Absent) for children attending a Center Based preschool program.
  - \* Generating electronic bills to the county for SEIT, Related Services and Center Based Tuition billing.

# Three Types Of Provider Users

- \* **Agency Administrators:**

- \* These individuals work for an agency.
- \* They perform tasks as a vendor related to billing.
- \* They also perform caseload management tasks such as assigning therapist to children, assigning children to classrooms (for center based children).

- \* **Agency Service Providers:**

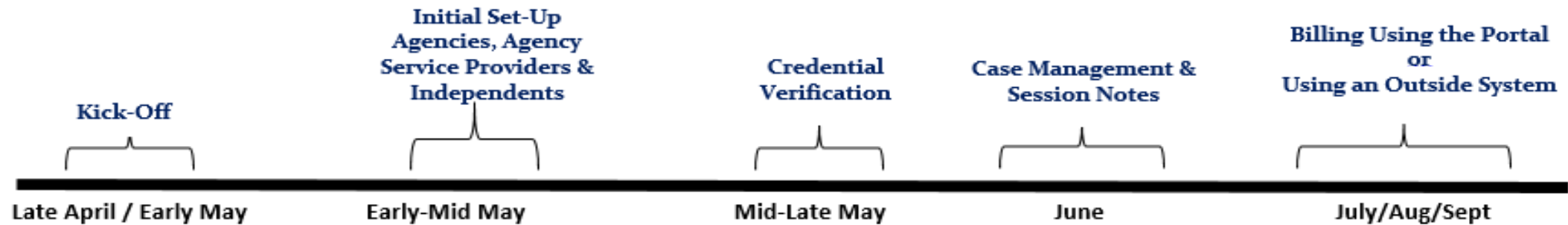
- \* These individuals work for an agency as a therapist.
- \* Their role is entering and signing session notes.

- \* **Independent Providers:**

- \* They are a service provider that performs the same tasks as an agency service provider.
- \* They are a vendor that contracts directly the county and thus also has the role of billing administrator.

# Getting Started Timeline

## CPSE PORTAL IMPLEMENTATION WEBINAR TIMELINE



1. Kick-Off Webinar
2. Initial Set-Up Webinar |
3. Credential Verification Webinar
4. Case Management & Session Notes Webinars
5. Billing Webinars (Portal & Non-Portal Users)

# How Do Users Get Logins

- \* The process is done by “invitations”.
- \* An invitation is created to invite the individual to create a login for an agency.
- \* The individual uses this invitation to create a username and password to the system.
  - \* This process will be covered at the end of the webinar.
- \* For Agencies: the County will create an initial invitation for an administrator. That administrator will then invite additional users for their agency.
- \* The County will also create an initial invitation for the Independent Provider.
- \* If you are already using CPSE Portal for another County, that same username will be used.

# Process Overview - Independent Providers

- \* County uploads list of children and their services (enrollments).
- \* Provider enters session notes / treatment logs for the enrollments.
- \* The provider digitally signs the session notes / treatment logs.
- \* Billing Provider bundles signed entries into an electronic voucher.
- \* Billing Provider digitally signs and submits electronic voucher to County.



# Process Overview – Agency SEIT / Related Service Providers

- \* County uploads list of children and their services (enrollments).
- \* Agency administrator assigns the children's services to a SEIT / therapist.
- \* The SEIT / therapist enters session notes / treatment logs for the enrollments.
- \* The SEIT / therapist digitally signs the session notes / treatment logs.
- \* Agency administrator bundles signed entries into an electronic voucher.
- \* Agency administrator digitally signs and submits electronic voucher to County.

# Entering Attendance on Weekly Calendar

**Weekly Attendance**

Doe, Jane - SLP    Jump To: 04/05/15   

<< today >>

**Apr 05, 2015 - Apr 11, 2015**

	Sunday Apr 05, 2015	Monday Apr 06, 2015	Tuesday Apr 07, 2015	Wednesday Apr 08, 2015	Thursday Apr 09, 2015	Friday Apr 10, 2015
8AM						
9AM						
10AM			10:15 am to 10:45 am Smith, Mark			
11AM						
12PM						
1PM						
2PM						
3PM						
4PM						

# Session Note / Treatment Log

New Session for Mar 2, 2021

Bill this session as:  x30 minute session(s) Preschool

☐ Co-Visit with Supervisor Location: Tumbling Tykes

Child: 2x30 - ST - I 11/17/20 - 06/24/21

Entry Type: Provided Treatment Session

Diagnosis Code(s): F80.2

CPT Codes: [Lookup]	Units:
<input type="checkbox"/> 92507 TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/OR AUDITORY PROCESSING DISORDER, INDIVIDUAL	<input type="text" value="1"/>
<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>

☐ Does Not Meet Medicaid Requirements

Progress: ☐ No Progress ☐ Limited Progress ☒ Progress

Session Notes:  
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

save cancel

# Digitally Sign Attendance

From Date:  
3/24/2015

To Date:  
6/24/2015

Enrollment:  
Not Selected

County:  
Albany

Provider:  
TrainingProvider100

Retrieve

Sign Attendance

<input type="checkbox"/>	Last Name	First Name	Service Date	Service Setting	CoVisit	Make Up	Start	End	CPT	ICD	Notes	
<input type="checkbox"/>	MANNIX	Klay	5/05/2015	Daycare							NOTES ARE FOR DEMONSTRATION SES ONLY.	Edit
<input type="checkbox"/>	MANNIX	Klay	5/07/2015	Daycare							NOTES ARE FOR DEMONSTRATION SES ONLY.	Edit
<input type="checkbox"/>	NYAHAY	Mikiala	5/11/2015	Daycare							NOTES ARE FOR DEMONSTRATION SES ONLY.	Edit
<input type="checkbox"/>	NYAHAY	Mikiala	5/13/2015	Daycare							NOTES ARE FOR DEMONSTRATION SES ONLY.	Edit
<input type="checkbox"/>	NYAHAY	Mikiala	5/18/2015	Daycare							NOTES ARE FOR DEMONSTRATION SES ONLY.	Edit
<input type="checkbox"/>	NYAHAY	Mikiala	5/19/2015	Daycare							NOTES ARE FOR DEMONSTRATION SES ONLY.	Edit
<input type="checkbox"/>	NYAHAY	Mikiala	5/26/2015	Daycare							NOTES ARE FOR DEMONSTRATION SES ONLY.	Edit
<input type="checkbox"/>	NYAHAY	Mikiala	5/29/2015	Daycare							NOTES ARE FOR DEMONSTRATION SES ONLY.	Edit

By entering my pin number, I/We certify that on the dates selected, the selected children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

NOTE: Credentials are REQUIRED to sign. Please verify credentials on your [profile page](#).

Name & Credentials: Klerisa SAMOUHA CCC-SLP

NPI: 1508012717

Date: 6/24/2015

Pin:

I agree.


# Process Overview – Approved 4410 Preschool Center Based Program

- \* County uploads list of Center Based children and their included related services (CB and CBRS enrollments).
- \* Agency administrator assigns children to various classrooms.
- \* Agency administrator assigns the children's included related services to therapist.
- \* An agency administrator or classroom teacher records children's classroom attendance (present / absent / closed).
- \* The therapist enters session notes / treatment logs for the CBRS enrollments.
- \* The therapist digitally signs the session notes / treatment logs.

# Process Overview – Approved 4410 Preschool Center Based Program

- \* An agency administrator or classroom teacher digitally signs a monthly attendance log for the classroom.
- \* Agency administrator creates an electronic voucher for all Center Based children.
- \* Agency administrator creates a zero dollar electronic voucher for all Center Based children's corresponding included services (CBRS).
- \* Agency administrator digitally signs and submits electronic vouchers to County.

# Classroom Attendance

**Current Week** 

<-- 01/31/21 - 02/06/21 -->

Enrollment	Mon <input checked="" type="checkbox"/>	Tue <input checked="" type="checkbox"/>	Wed <input checked="" type="checkbox"/>	Thu <input checked="" type="checkbox"/>	Fri <input checked="" type="checkbox"/>
	02/01/21	02/02/21	02/03/21	02/04/21	02/05/21
9/09/20-6/24/21 (CB2021W0020658)					
9/09/20-6/24/21 (CB2021W0020738)					
9/09/20-6/24/21 (CB2021W0021332)					
9/09/20-6/24/21 (CB2021W0020660)					
9/09/20-6/24/21 (CB2021W0020991)					
9/09/20-6/24/21 (CB2021W0021327)					
Total Sessions: <span>30</span>					



# Voucher Details

## Voucher Details

### Info

Voucher #: RS160731064142

Billing Date: 8/1/2016

Authorized Claimant: Mary Jones

### Voucher header information

Description: July 2016  
Occupational  
Therapy  
Claimant Title: Executive Director

Service month filter

Service Type filter

July 2016  
July 2016

☒ Program  
☒ 9200

(Service)

Filter

Unassigned = not on voucher

Assigned = items on voucher

A=Adjustment R=Regular

### Unassigned

<input type="checkbox"/>	Last Name	First Name	Month	Sessions	Amount	Svc	ESID
<input type="checkbox"/>	ASH	SON	July 2016	6	\$300.00 (R)	ST	RS1617S0083825
<input type="checkbox"/>	BERMAN	MARCELINA	July 2016	7	\$350.00 (R)	ST	RS1617S0083262
<input type="checkbox"/>	BLUM	MERYL	July 2016	2	\$100.00 (R)	PT	RS1617S0083935
<input type="checkbox"/>	BRADLEY	GILBERT	July 2016	4	\$200.00 (R)	OT	RS1617S0084047
<input type="checkbox"/>	BREWSTER	RAMON	July 2016	5	\$250.00 (R)	ST	RS1617S0083820
<input type="checkbox"/>	BUSTAMANTE	RICHARD	July 2016	5	\$250.00 (R)	ST	RS1617S0084049
<input type="checkbox"/>	BYRD	BRITTANI	July 2016	1	\$50.00 (R)	ST	RS1617S0084015
<input type="checkbox"/>	CALHOUN	KRISTAL	July 2016	5	\$375.00 (R)	ST	RS1617S0083260
<input type="checkbox"/>	CAMPOS	CAREY	July 2016	4	\$200.00 (R)	ST	RS1617S0083934
<input type="checkbox"/>	CARUSO	LOWELL	July 2016	4	\$200.00 (R)	ST	RS1617S0083928

If you are looking for entries that are not appearing, try clicking "recalc"!

Assign -->

### Assigned

<-- Unassign

Return to Voucher Management

Recalc

Save

Amount Billed: \$0.00



# Voucher Summary



## Voucher Summary

Printed: 7/31/2016 7:56:15 PM

Page 1 of 1

**Provider:** HIGHER LEARNING, LLC

**Vendor#:**

**Tax ID:**

**SED Provider Code:**

**Bill To County:** ERIE

**Bill Date:** 8/1/2016

**Voucher#:** RS160731064142

**Service Month:** July 2016

**Voucher Description:** July 2016 Occupational Therapy

Child Name	ESID	Frequency	Service	Dates Of Service	Rate	Units	Minutes Per Unit	Amount
BRADLEY, GILBERT	RS1617S0084047	2x30 - I	RS - OT	Jul 2016 - 19, 21, 25, 26	\$50.00	4.00	30	\$200.00
DEVRIES, SHAYNA	RS1617S0083923	2x30 - I	RS - OT	Jul 2016 - 12, 13, 19, 21, 26, 28	\$50.00	6.00	30	\$300.00
HEIN, SHEENA	RS1617S0083946	3x30 - I	RS - OT	Jul 2016 - 12, 13, 15, 19, 21, 22, 26, 28	\$50.00	8.00	30	\$400.00
MCCORD, THERON	RS1617S0083270	1x30 - I	RS - OT	Jul 2016 - 6, 19, 26	\$50.00	3.00	30	\$150.00
NIETO, OWEN	RS1617S0083427	2x30 - I	RS - OT	Jul 2016 - 12, 13, 18, 19, 21	\$50.00	5.00	30	\$250.00
VICKERS, KIARA	RS1617S0083792	1x30 - I	RS - OT	Jul 2016 - 21, 26	\$50.00	2.00	30	\$100.00
WHITT, ROLLAND	RS1617S0083265	1x30 - I	RS - OT	Jul 2016 - 6, 22, 25	\$50.00	3.00	30	\$150.00
<b>Grand Total:</b>								<b>\$1,550.00</b>

I certify that on the dates above, the above named child received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

**Authorized Signature:** \_\_\_\_\_

**Certification:** \_\_\_\_\_

# Uploading Attendance / Session Notes

- \* Some agencies may already have a system where their providers enter their session notes and digitally sign them.
- \* If your agency does use their own system, then CPSE has a mechanism for uploading a file of those entries.
- \* Information about that process can be found here:
  - \* <http://support.cpseportal.com/kb/a67/schema-for-attendance-file-upload.aspx?KBSearchID=16206>

# Training Webinars

- \* Over the next few months we will be holding training webinars on various topics.
- \* In order to maximize relevancy, the timing of the webinars will correspond to the stage of the implementation. For example, we won't be training on how to create a billing voucher in May, since that won't be used until August.
- \* Each webinar will have a different target audience such as:
  - \* Independent Provider
  - \* Agency Service Providers
  - \* Agency Service Providers and Independent Providers
  - \* Agency Administrators
  - \* Center Based Agency Administrators
  - \* Agency Administrators and Independent Providers

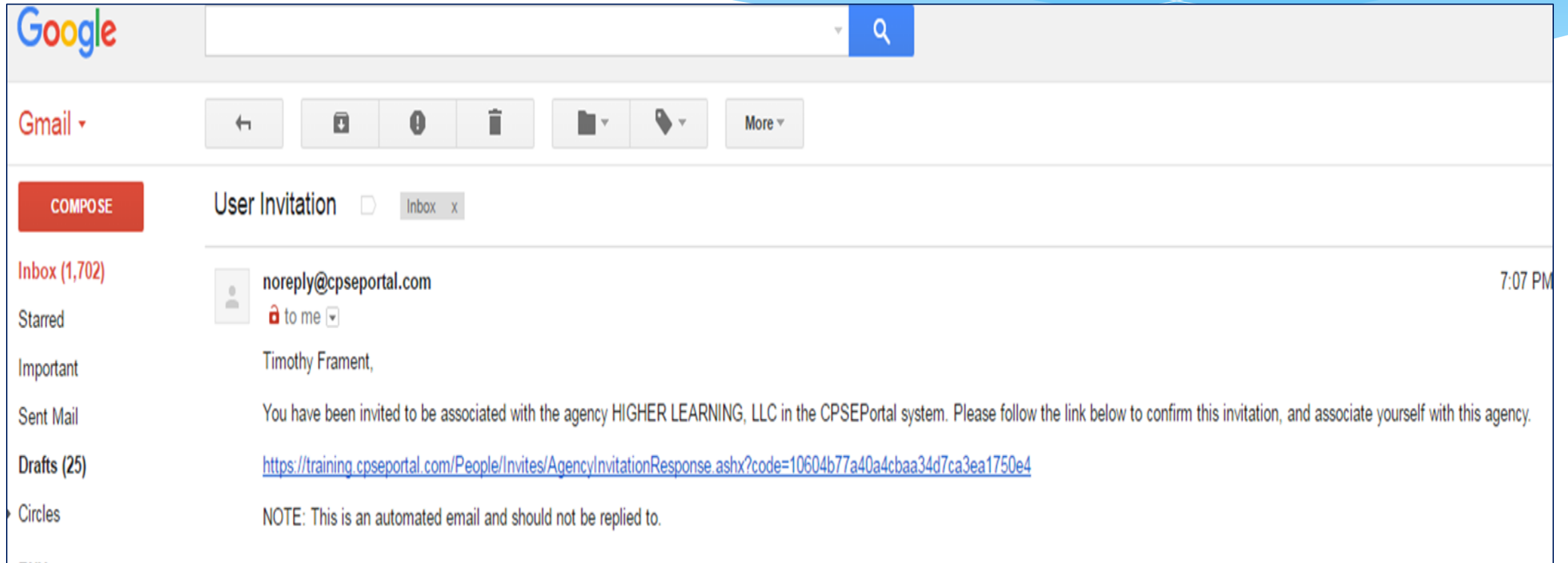
# Next Steps

- \* Agency - create an initial administrator login.
- \* For Agency Administrators:
  - \* Gather a list of your therapists / SEIT teachers, etc. in preparation for adding them to the system. Fields should include:
    - \* First Name and Last Name
    - \* Email
    - \* NPI
    - \* Profession (OT, PT, SLP, etc.) and NY License #
  - \* If you use an external system already, and want to pursue uploading attendance, provide your software vendor with this link so they can get started:  
<http://support.cpseportal.com/kb/a67/schema-for-attendance-file-upload.aspx?KBSearchID=16206>

# Accepting Invitations

- \* Below is a Knowledge Base link on Accepting Invitations:
  - \* [\*\*http://support.cpseportal.com/kb/a257/accepting-your-cpse-portal-invitation.aspx?KBSearchID=16202\*\*](http://support.cpseportal.com/kb/a257/accepting-your-cpse-portal-invitation.aspx?KBSearchID=16202)

# Invitation Email



# Sample Invitation 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

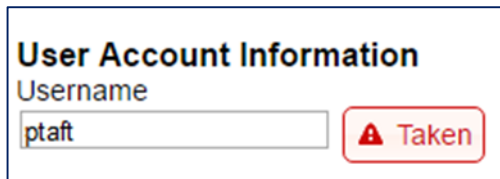
Username

Password                      Confirm Password  
   

[Accept Invitation](#)

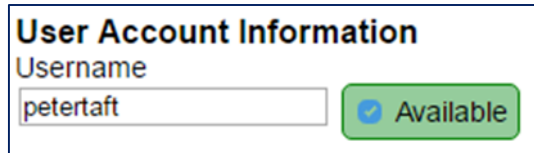
# Choosing Username and Password

- \* 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:



The screenshot shows a form titled "User Account Information". Below the title is a label "Username" followed by a text input field containing the text "ptaft". To the right of the input field is a red rectangular button with a white triangle icon and the word "Taken" in red text.

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



The screenshot shows a form titled "User Account Information". Below the title is a label "Username" followed by a text input field containing the text "petertaft". To the right of the input field is a green rectangular button with a white checkmark icon and the word "Available" in green text.

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



# Upcoming Webinars

- \* **CPSE Portal Initial Setup – Agency Administrators:**
  - \* Tuesday, May 10, 2022 @ 10:00AM
    - \* <https://attendee.gotowebinar.com/register/3155232656603358477>
  - \* Tuesday, May 10, 2022 @ 3:00PM
    - \* <https://attendee.gotowebinar.com/register/2980159619135905803>
  - \* Thursday, May 12, 2022 @ 10:00AM
    - \* <https://attendee.gotowebinar.com/register/2217759355947695631>
  - \* Thursday, May 12, 2022 @ 3:00PM
    - \* <https://attendee.gotowebinar.com/register/6711622807854217231>

# Upcoming Webinars

- \* **CPSE Portal Initial Setup – Agency Service Providers and Independent Providers:**

- \* Tuesday, May 17, 2022 @ 10:00AM
  - \* <https://attendee.gotowebinar.com/register/1409971252764886284>
- \* Tuesday, May 17, 2022 @ 3:00PM
  - \* <https://attendee.gotowebinar.com/register/532579665497356304>
- \* Friday, May 20, 2022 @ 10:00AM
  - \* <https://attendee.gotowebinar.com/register/4876613767398465805>
- \* Friday, May 20, 2022 @ 4:00PM
  - \* <https://attendee.gotowebinar.com/register/6482237194509566224>

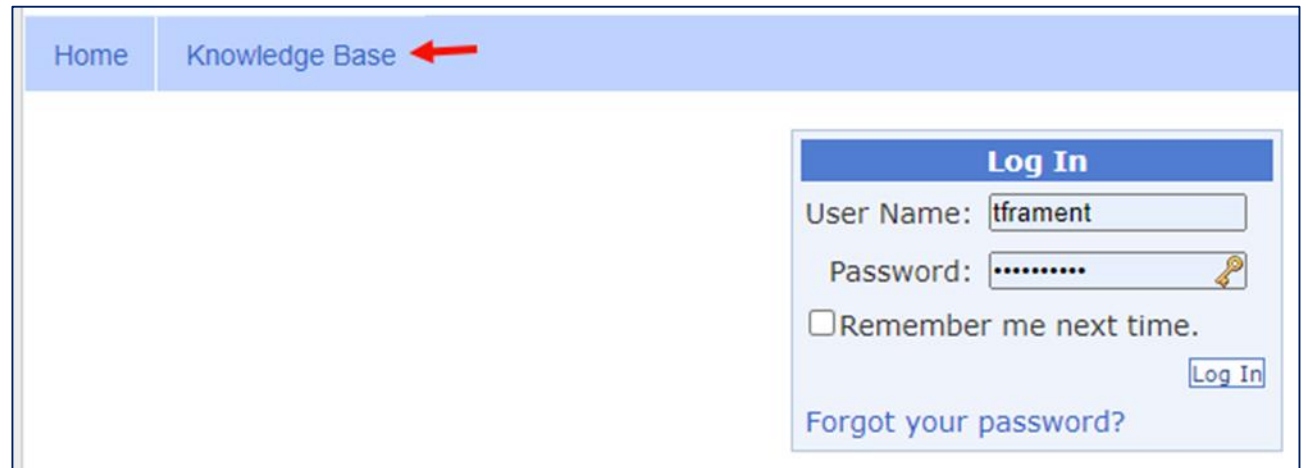
# Upcoming Webinars

- \* **Credential Verification (ALL):**

- \* Tuesday, May 24, 2022 @ 10:00AM
  - \* <https://attendee.gotowebinar.com/register/2449828877176208140>
- \* Tuesday, May 24, 2022 @ 2:00PM
  - \* <https://attendee.gotowebinar.com/register/69155305599391243>
- \* Thursday, May 26, 2022 @ 10:00AM
  - \* <https://attendee.gotowebinar.com/register/3336336515349748238>
- \* Thursday, May 26, 2022 @ 2:00PM
  - \* <https://attendee.gotowebinar.com/register/8509885070198522894>
- \* Tuesday, May 31, 2022 @ 10:00AM
  - \* <https://attendee.gotowebinar.com/register/742817283844704268>
- \* Tuesday, May 31, 2022 @ 4:00PM
  - \* <https://attendee.gotowebinar.com/register/8313109872222039311>

# CPSE Support

- \* Website is [www.CPSEPortal.com](http://www.CPSEPortal.com)
  - \* **Bookmark this page**
- \* Has a link to Knowledge Base
- \* Questions
  - \* Email [support@CPSEPortal.com](mailto:support@CPSEPortal.com)



The screenshot shows a web interface with a light blue header. On the left, there are two tabs: 'Home' and 'Knowledge Base'. A red arrow points to the 'Knowledge Base' tab. On the right side of the page, there is a 'Log In' form. The form has a title 'Log In' in a blue box. Below the title, there are two input fields: 'User Name:' with the text 'tframent' and 'Password:' with masked characters '.....'. To the right of the password field is a small key icon. Below these fields is a checkbox labeled 'Remember me next time.' and a 'Log In' button. At the bottom of the form is a link that says 'Forgot your password?'.