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.**

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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.

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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).
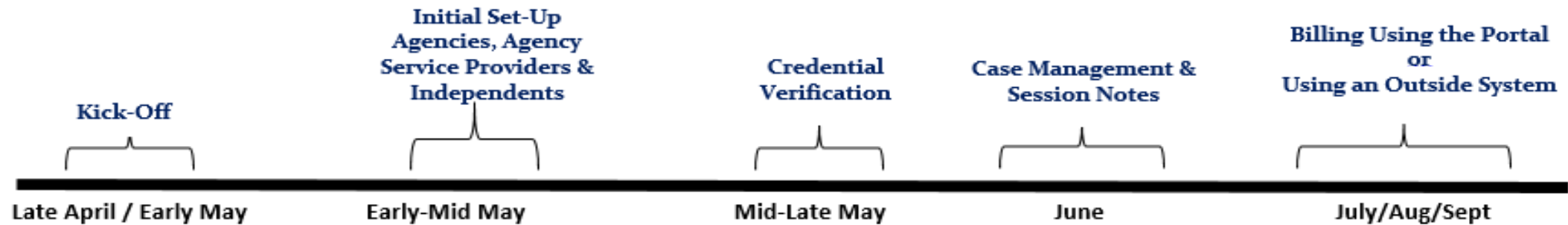* **Agency Service Providers:**
    * These individuals work for an agency as a therapist.
    * Their role is entering and signing session notes.
* **Independent Providers:**
    * They are a service provider that performs the same tasks as an agency service provider.
    * They are a vendor that contracts directly the county and thus also has the role of billing administrator.

Getting Started Timeline

CPSE PORTAL IMPLEMENTATION WEBINAR TIMELINE

	Kick-Off	Initial Set-Up Agencies, Agency Service Providers & Independents	Credential Verification	Case Management & Session Notes	Billing Using the Portal or Using an Outside System
	Late April / Early May	Early-Mid May	Mid-Late May	June	July/Aug/Sept

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.

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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   [Save]

◄◄ 🏠 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

Digitally Sign Attendance

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.

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Classroom Attendance

Voucher Details

Voucher Details

Info

Voucher #: RS160731064142	**Description:** July 2016 Occupational Therapy
Billing Date: 8/1/2016	**Claimant Title:** Executive Director
Authorized Claimant: Mary Jones	

Voucher header information

Service month filter   *Service Type filter*

Unassigned = not on voucher   *Assigned = items on voucher*

A=Adjustment   R=Regular

July 2016 ▼
July 2016 ▼

☑ Program   (Service) ▼
☑ 9200   **Filter**

Unassigned

Assigned

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

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

Assign -->

<-- Unassign

Return to Voucher Management   **Recalc**   **Save**   Amount Billed: **$0.00**

Voucher Summary

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*

Invitation Email
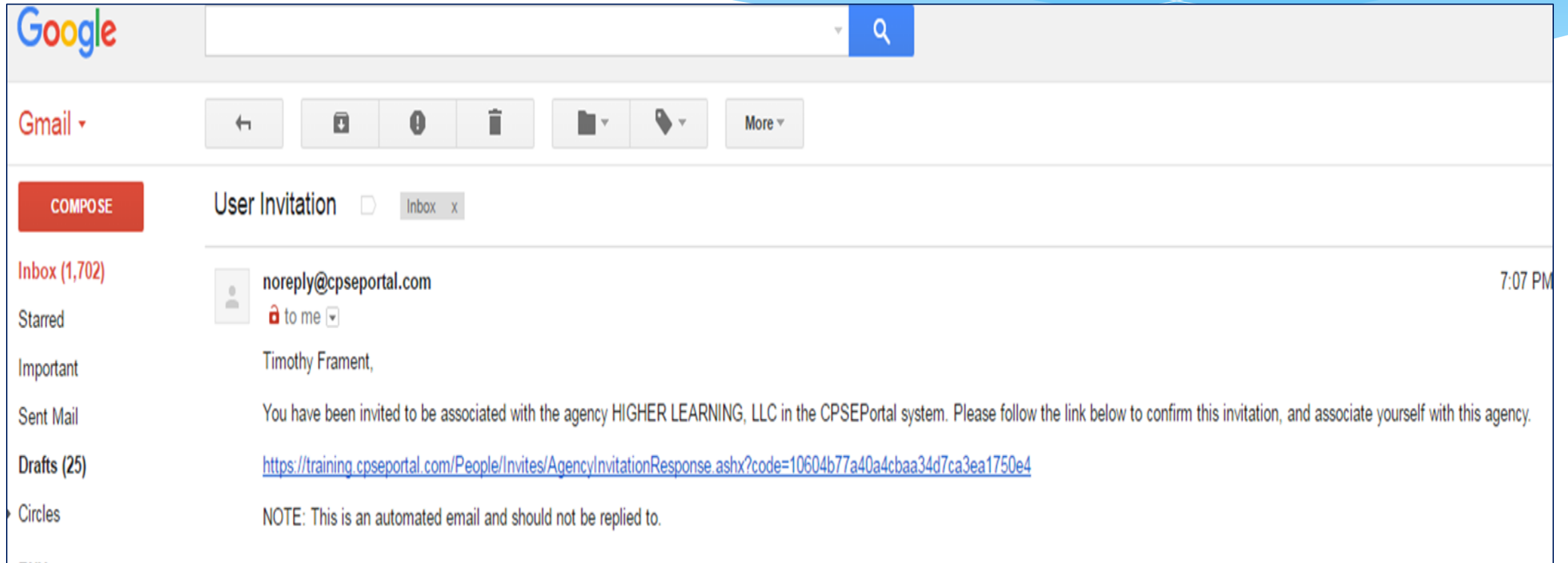
Sample Invitation to Provider

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
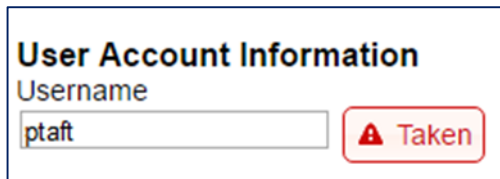[   ]

User Account Information
Username
[   ]

Password   Confirm Password
[   ] 🔑   [   ] 🔑
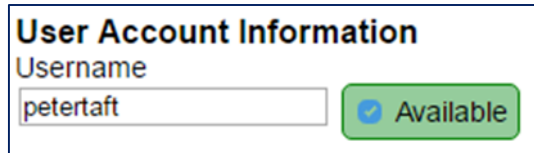
[**Accept Invitation**]

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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
ptaft [⚠ Taken]

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

User Account Information
Username
petertaft [✓ Available]

* 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*

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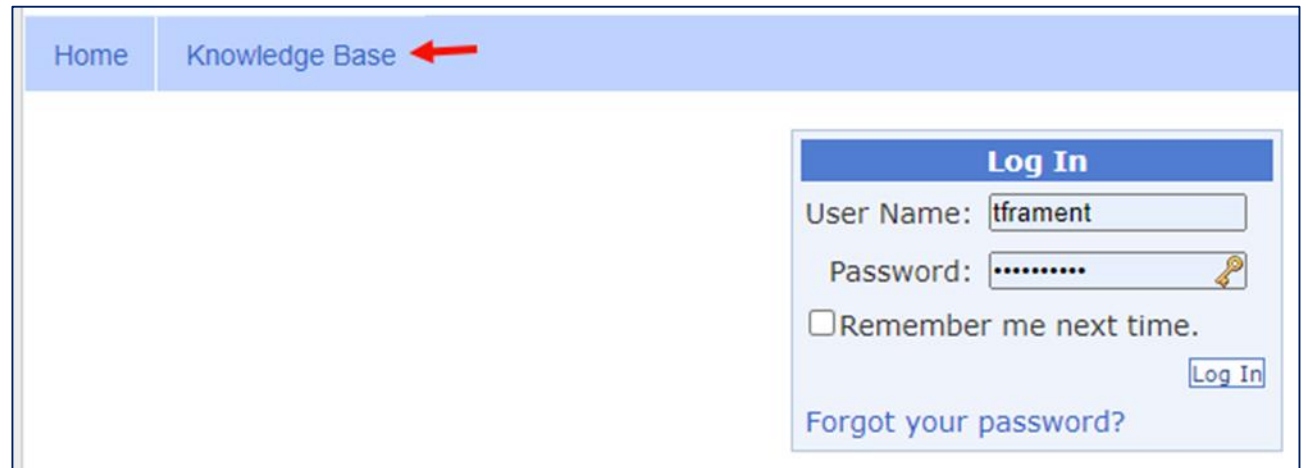
Upcoming Webinars

* **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*

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CPSE Support

* Website is **www.CPSEPortal.com**
  * *Bookmark this page*

* Has a link to Knowledge Base

* Questions
  * Email *support@CPSEPortal.com*