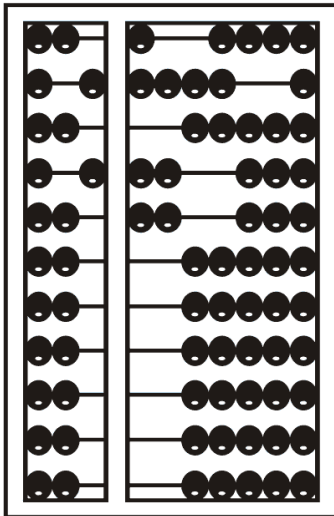


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& ASSOCIATES INC.  
Consultants



# CPSE Portal Initial Setup Agency Administrators

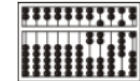
# TOPICS COVERED

- \* Accepting Invitation
  - \* Therapists that work for multiple agencies have one login
- \* NPI/NPI Lookup
- \* Inviting Therapists To Use Portal
  - \* Licensed professionals vs other service providers
  - \* License #
  - \* Inviting multiple users
  - \* Uploading spreadsheet
  - \* Portal profession codes
- \* Inviting Agency Staff To Use Portal
  - \* Office user vs Billing admin
- \* Agency Billing Provider Profile
- \* Portal Admin User Access
  - \* Billing Staff/Office Provider Role
  - \* Supervisor Role
- \* Resetting Forgotten Password
- \* Changing Your Password
- \* Choosing Your PIN
  - \* My Profile
- \* Edit My User Information
- \* My Articles/News Feed
- \* Knowledge Base
- \* Upcoming Webinars
- \* Closing Remarks and CPSE Portal Support Information

# CPSE Portal



Hello, kkr . 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

User Profile

Username: **kknowles**  
First Name:  
Last Name:  
Email: **kknowles@jmcguinness.com**

[Edit User Account](#)

Hide

News Feed

[View All Your Articles](#)

[New CPSE Portal features for 2020-2021](#)

**7/7/2020** [more](#)

A new version of CPSE Portal arrives on 7/8

[dismiss](#)

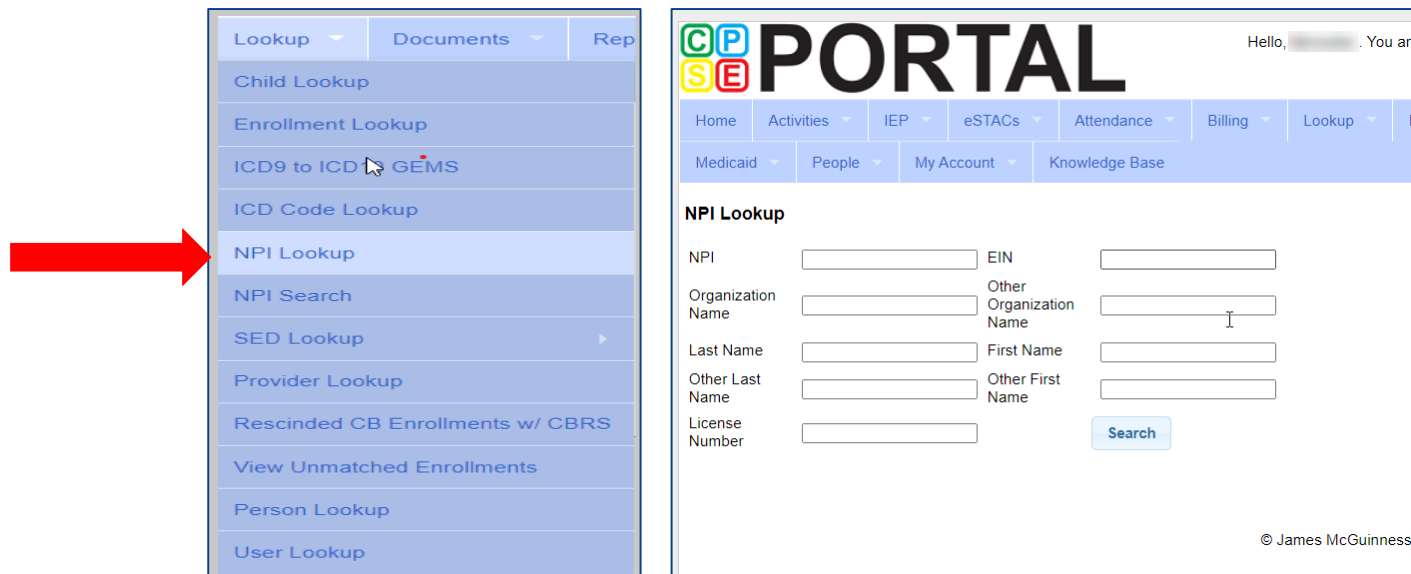
© James McGuinness & Associates

# Portal Invitation Process for Agency

- \* The agency is the primary link between the CPSE Portal & service providers.
- \* The agency will be sent an email invitation to join the Portal.
- \* You will click the link in the email and setup your password and PIN.
- \* Ensure NPI/BEDS code are correct.
- \* Billing providers will need to create a PIN for submitting vouchers to the county.
- \* An agency will get **one** invitation, and then they can invite staff as appropriate.
- \* If you already use the Portal, the county will link your current logon to their county.
- \* When inviting service providers, **make sure** that their **NPI, license number, and email address** are correct. This is especially important when a service provider works for multiple agencies.

# NPI Lookup

If you need to invite a service provider and do not know their NPI #, you can search for them using the NPI Lookup feature on the Lookup Menu. Go to **Lookup -> NPI Lookup**.



The image shows two screenshots from the CPSE Portal. The left screenshot displays a sidebar menu with the 'Lookup' dropdown expanded, showing various options. A red arrow points to the 'NPI Lookup' option. The right screenshot shows the 'NPI Lookup' form, which includes input fields for NPI, EIN, Organization Name, Last Name, First Name, Other Last Name, Other First Name, and License Number, along with a 'Search' button.

**Left Screenshot: Lookup Menu**

- Lookup ▾
- Documents ▾
- Rep
- Child Lookup
- Enrollment Lookup
- ICD9 to ICD10 GEMS
- ICD Code Lookup
- NPI Lookup**
- NPI Search
- SED Lookup ▶
- Provider Lookup
- Rescinded CB Enrollments w/ CBRS
- View Unmatched Enrollments
- Person Lookup
- User Lookup

**Right Screenshot: NPI Lookup Form**

CPSE PORTAL Hello, [User]. You are

Home ▾ Activities ▾ IEP ▾ eSTACs ▾ Attendance ▾ Billing ▾ Lookup ▾

Medicaid ▾ People ▾ My Account ▾ Knowledge Base

**NPI Lookup**

NPI  EIN

Organization Name  Other Organization Name

Last Name  First Name

Other Last Name  Other First Name

License Number

© James McGuinness

# Portal Invitations – Single Service Provider Invite

Agencies will send an invitation to a Service Provider. A service provider is a person who is an individual who provides services to the child. To send an invitation, go to **People > Invitations**.

The screenshot displays the CPSE Portal interface. At the top, the logo "CPSE PORTAL" is visible on the left, and the user status "Hello, [redacted] Therapy Group. You are currently logged in for Richard [redacted] (Logout)" is on the right. Below the logo, a navigation bar contains links: Home, File Transfer, Activities, Attendance, Billing, Caseload Maintenance, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The "People" link is selected, opening a dropdown menu with the following options: Credential Approval Listing, Provider Specific Identifiers, Service Provider Listing For School Year, Service Provider Credential Listing, Service Providers With Multiple Licenses, Service Providers With License Issues, Service Provider Credential Verification Listing, Users, People, and Invitations. The "Invitations" option is circled in red. On the left side of the page, there are two profile sections: "User Profile" (showing Username: [redacted] Therapy Group, First Name: Richard, Last Name: [redacted], Email: imell@jmcguinness.com) and "My Professional Profile" (showing Name: [redacted], NPI: I do not have an NPI, and a signature for Richard T. [redacted] PT). On the right side, there is a "News Feed" section with a message about system maintenance on 11/10/19 and 11/11/19. The footer of the page reads "© James McGuinness & Associates".

# Portal Invitations – Single Service Provider Invite

After you click Invitations, the following screen appears. Fill in all of the service providers information. Note that the service providers name & credentials will appear next to their NPI #. Make sure this information is correct before clicking ***“Send Invite.”***

**Invite Someone**

First Name: Lisa Last Name: Smith

Email: Lsmith@gmail.com Confirm Email: Lsmith@gamil.com

Provider: INC User Type: Service Provider

Profession: OT - Licensed Occupational Therapist

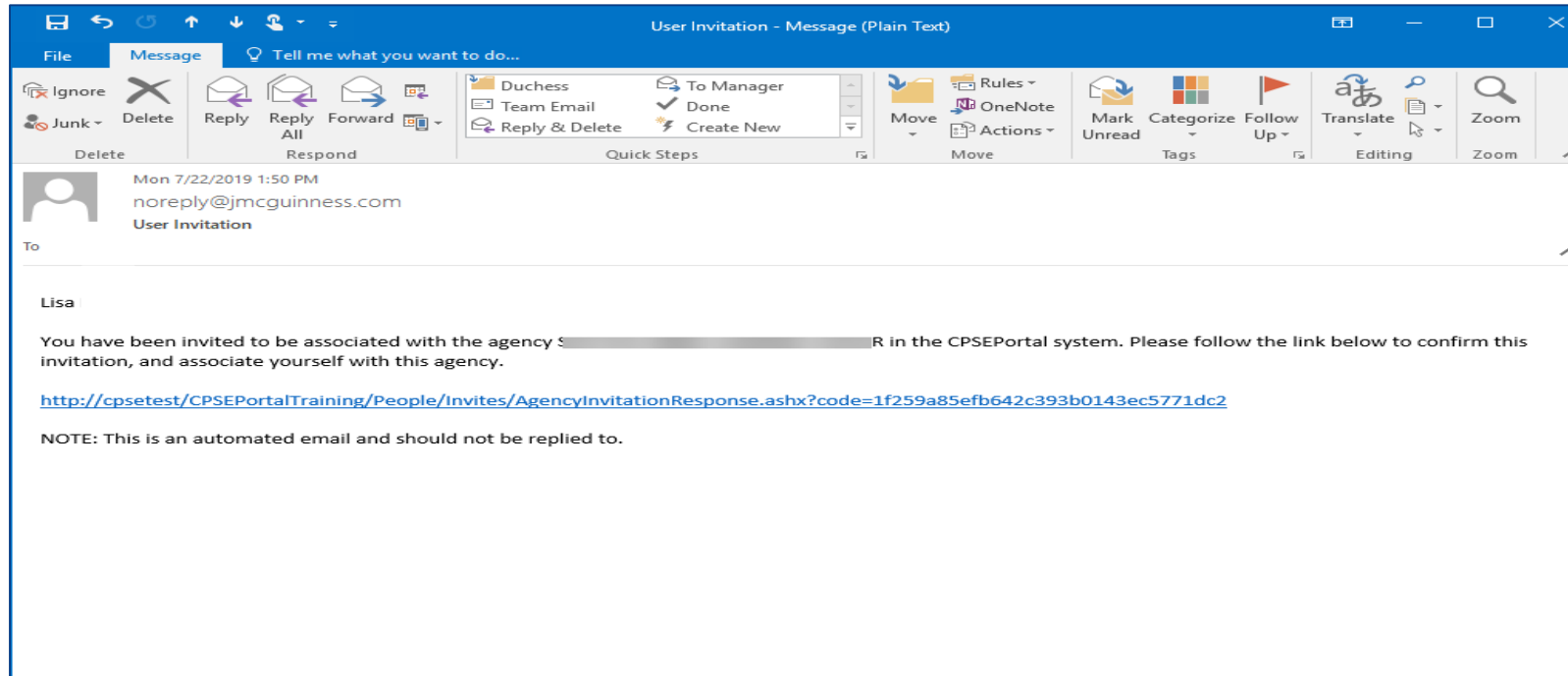
NPI: 1083193270 LISA SMITH, DOT, OTR

NYS License Number: 013595

**Send Invite**

# Portal Invitations – Single Service Provider Invite Sample Email

After the agency sends out the invitation, the service provider will receive the following email. The service provider will click the link to set up their account in the Portal.





# Portal Invitations – Single Provider Invite

## Accepting Invitation

This screen comes up after the service provider clicks the link. The service 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' 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, the page title is 'CPSEPortal Invitation'. A message states: 'You have been invited to be associated with [redacted], [redacted] 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.'

The form is divided into several sections:

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

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

# Portal Invitations – Invite Multiple Users

- \* As an alternative the agency can also invite “multiple” service providers at once by completing the template shown below. When complete, this template is imported and all service providers listed in the template will receive the email invitation. Service provider information needed is: *First Name, Last Name, Email, NPI & Profession Code.*

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Email	Provider Specific ID	NPI	Profession Code	NY License	License From Date	License To Date
2									
3									
4									
5									
6									

- \* Additional information can be found in the Knowledge Base:
- \* <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175> or (search for “template” or invitations”).

# Portal Profession Codes

- \* The Portal Profession Codes must be entered on the template and can be found in the Knowledge Base article below.
- \* <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175> or (search for “template” or invitations”).

The list of profession codes that can be used:

Profession Code	Description
AIDE	Classroom or 1:1 AIDE
AUD	Audiologist
CFY	Clinical First Year
COTA	Certified Occupational Therapist Assistant
CSP	Certified School Psychologist
CSW	Clinical Social Worker
INT	Bilingual Interpreter
LCSW	Licensed Clinical Social Worker
LMSW	Licensed Master Social Worker
LPN	Licensed Practical Nurse
MUS	Music Therapist
OT	Occupational Therapist (Registered)
OTA	Occupational Therapist Assistant
PSY	Licensed Psychologist
PT	Physical Therapist
PTA	Physical Therapist Assistant
RN	Registered Nurse
SLP	Speech & Language Pathologist
SPED	Special Education Teacher
TD	Teacher of the Deaf
TEACH	Teacher
TSHH	Teacher of Speech & Hearing Handicapped
TSLD	Teacher of Speech & Language Disabilities
TVI	Teacher of the Visually Impaired

# Invitations – Multiple User Template

To send an invitation using the template, go to **People > Invitations**.



# Invitations – Multiple User Template

You will then choose ***Import Invitation Batch File.***

**Manage Invitations**  
User Type (All) ▾ Show Only Pending ☐ Search  

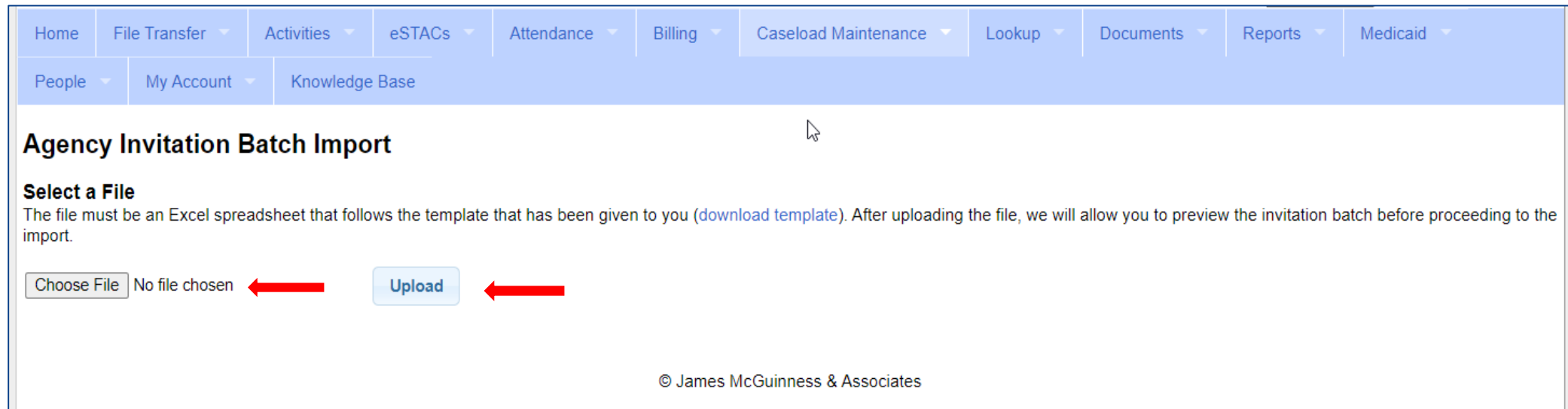
No invitations found.

Invite Someone Import Invitation Batch File



# Invitations – Multiple User Template Upload Template

You will then click Choose File, find your template, and click Upload.





Home File Transfer ▾ Activities ▾ eSTACs ▾ Attendance ▾ Billing ▾ Caseload Maintenance ▾ Lookup ▾ Documents ▾ Reports ▾ Medicaid ▾

People ▾ My Account ▾ Knowledge Base

## 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.

Choose File No file chosen  Upload 

© James McGuinness & Associates

# Invitations – Multiple User Template

## Preview Invitations

- \* This screen will show problems as well as successful imported entries.
- \* Click either “Accept & Send Invites” or “Decline & Cancel”.

**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

Accept & Send Invites Decline & Cancel

# Portal Invitation – Office User

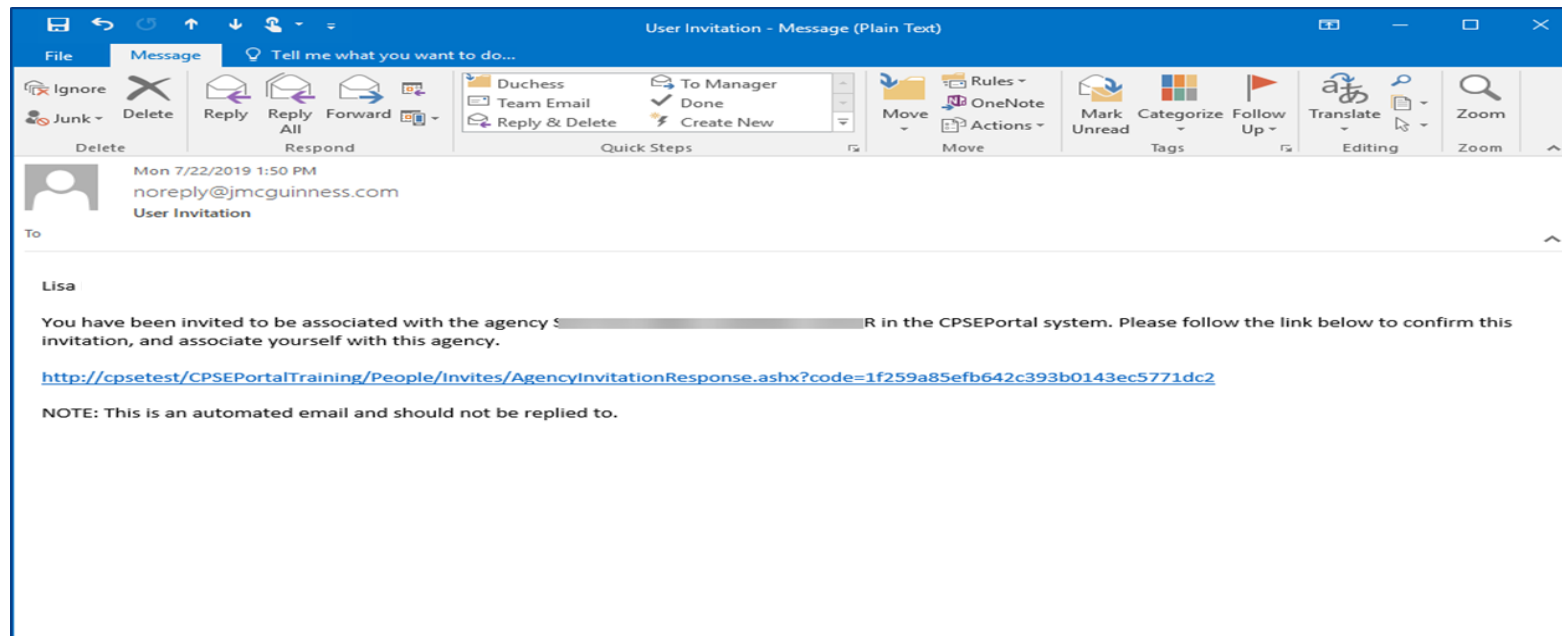
- \* To send an invitation to office staff who will be using the Portal, go to **People > Invitations**.
- \* The next screen will then be to Invite Someone.
- \* Enter all information on this screen, and your User Type will be “Office”.
- \* If your Office user will be submitting vouchers to the county, then you will need to check the box “**Allow user to submit vouchers to county**”.

A screenshot of the 'Invite Someone' form in the portal. The form contains fields for 'First Name', 'Last Name', 'Email', and 'Confirm Email'. Below these are 'Provider' and 'User Type' dropdown menus. The 'User Type' dropdown is set to 'Office'. At the bottom, there is a checkbox labeled 'Allow user to submit vouchers to county' which is checked. A red box highlights this checkbox. A 'Send Invite' button is located at the bottom right of the form. A red arrow points from the 'Invitations' option in the previous dropdown menu to this form.



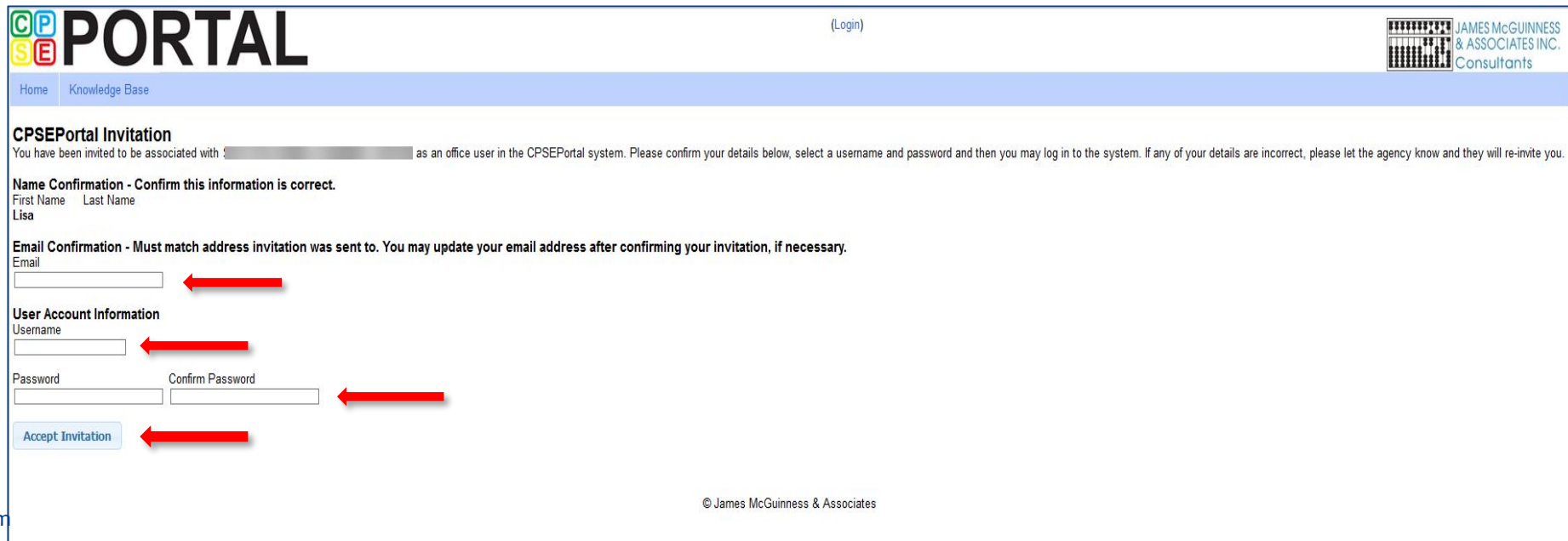
# Portal Invitation – Office User

After the agency sends out the invitation, the office user will receive the following email. The office user will click the link, to set up their account in the Portal.



# Portal Invitation – Office User

This screen comes up after the office user clicks the link. The office user will fill in the information below and then click the “**Accept Invitation**” button. At this point, the invitation process is complete.



The screenshot shows the CPSEPortal Invitation page. At the top left is the CPSE PORTAL logo. At the top right is a (Login) link and the James McGuinness & Associates Inc. Consultants logo. 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 text: "You have been invited to be associated with [redacted] 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 are four sections: "Name Confirmation - Confirm this information is correct." with First Name and Last Name fields (Last Name contains "Lisa"); "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; "User Account Information" with Username, Password, and Confirm Password fields; and an "Accept Invitation" button. Red arrows point to the Email field, the Username field, the Password field, the Confirm Password field, and the Accept Invitation button.

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

Home Knowledge Base

### CPSEPortal Invitation

You have been invited to be associated with [redacted] 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  
Lisa

**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

© James McGuinness & Associates

# Agency Billing Provider Profile

- \* Agencies will need to create a Billing Provider Profile.
- \* Go to ***My Account > Billing Provider Profile***



# Agency Billing Provider Profile

All information entered on this screen will be the agencies information only.

**Billing Provider Profile**

Provider Info

User Information

**Billing Provider**  
Name

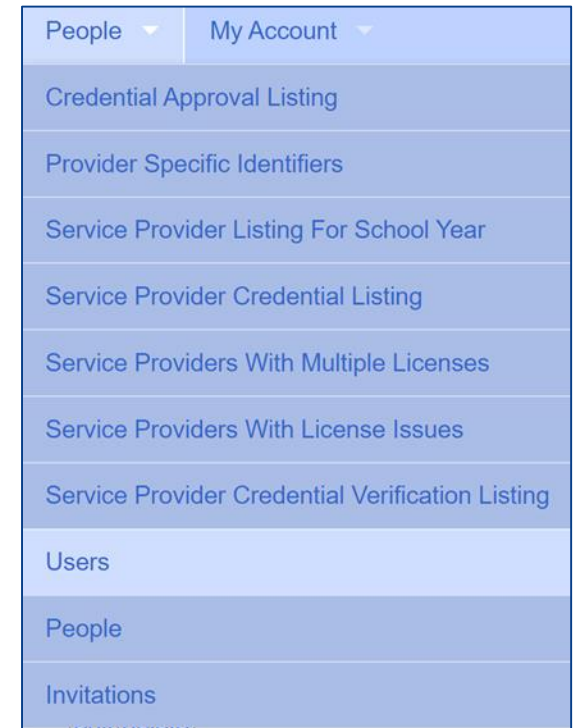
**Billing Address**  
Address 1   
Address 2   
City  State  Zip   
Phone Number

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			

# Portal Admin- User Access

- \* Go to **People > Users**
- \* Within User Access:
  - \* See all users assigned to your agency
  - \* Assign role of Billing Staff
  - \* Assign role of Service Provider
  - \* Remove access to Portal or delete provider or roles



# Portal Admin- User Access

## Viewing/changing Existing Users

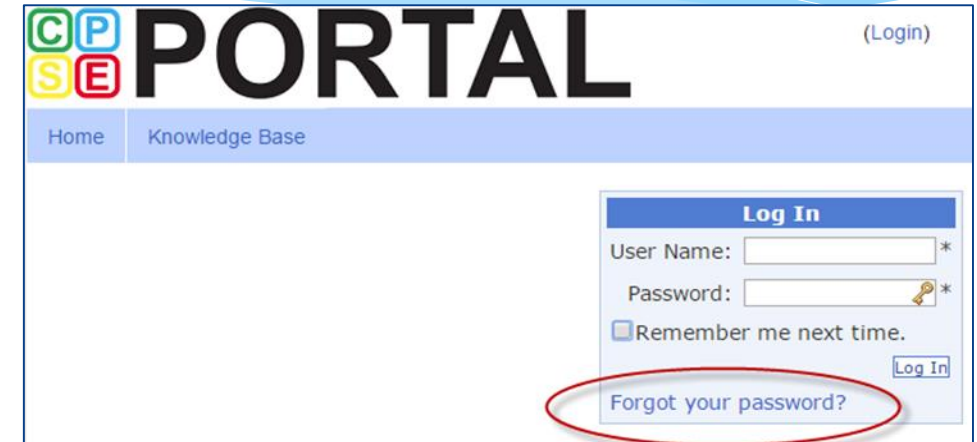
You will check off if a staff member is a Service Provider, Supervisor, a Basic User or a Billing Admin. Some staff may have more than 1 box checked.

Users											
Provider <input type="text"/>											
Username	First Name	Last Name	Email	Associated Person	Service Provider	Supervisor	QA Supervisor	Basic	Billing Admin		
ALEXA.FLANAGAN12			demo@cpseportal.com	FLANAGAN, ALEXA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	update cancel	delete
RIKKI.PUCKETT10516	Josephine	Acheta	demo@cpseportal.com	PUCKETT, RIKKI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
RINA.DOWNING10517	Cathy	Campbell	lmell@jmcguinness.com	DOWNING, RINA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	edit	delete
PENEL.BUCKLEY12095	Wendy	Hill	demo@cpseportal.com	BUCKLEY, PENELOPE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MITCH.WHEELER14250	Katherine	Agard	demo@cpseportal.com	WHEELER, MITCHELL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
BARBR.MCKEE798	RUTH	AGNE	demo@cpseportal.com	MCKEE, BARBRA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
ABIGA.COTTON10257	Aimee	Alvarez	demo@cpseportal.com	COTTON, ABIGAIL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete
MINA.GILLESPIE3614	Abigail	Andrews	demo@cpseportal.com	GILLESPIE, MINA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	edit	delete

- Admin-(management/administrators) can submit vouchers on behalf of the agency
- Basic- (clerical/billing staff)
- Supervisor (UDO/USO)
- QA Supervisor (quality assurance supervisor)

# 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**

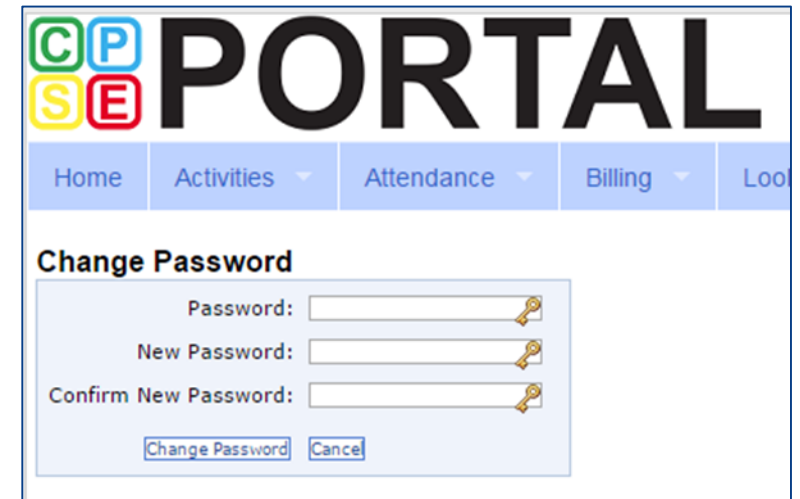
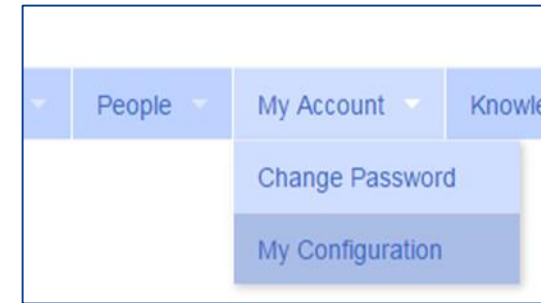
**Forgot Your Password?**

Enter your User Name to receive your password.

User Name:

# Changing Your Password

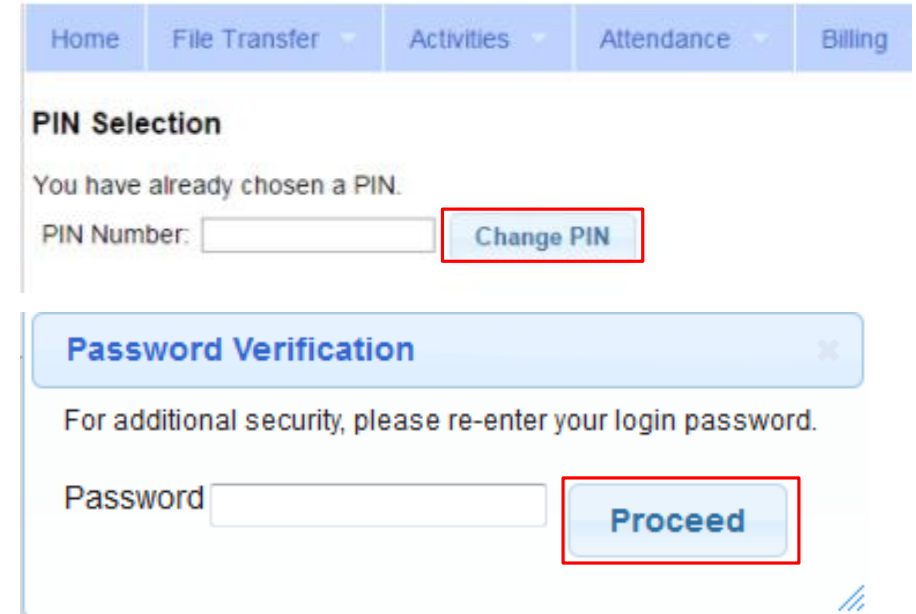
- \* Go to **My Account > Change Password**.
- \* Enter your current password in the password field.
- \* Enter your New Password.
- \* Re-enter your New Password to confirm it was entered correctly.
- \* <http://support.cpseportal.com/kb/a14/change-password.aspx?KBSearchID=16315>

A screenshot of the CPSE Portal'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 Look. 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'.



# Choosing Your PIN

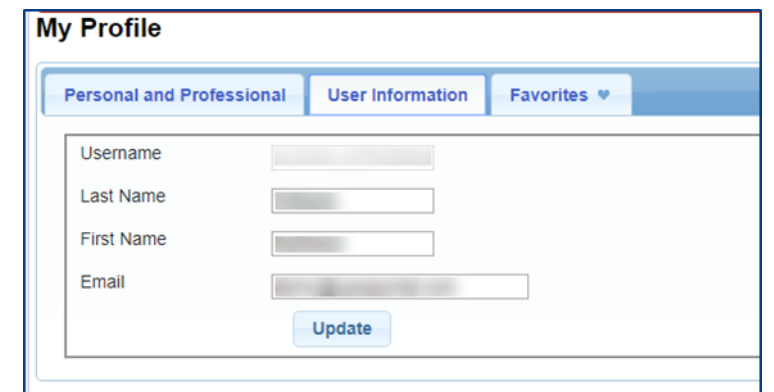
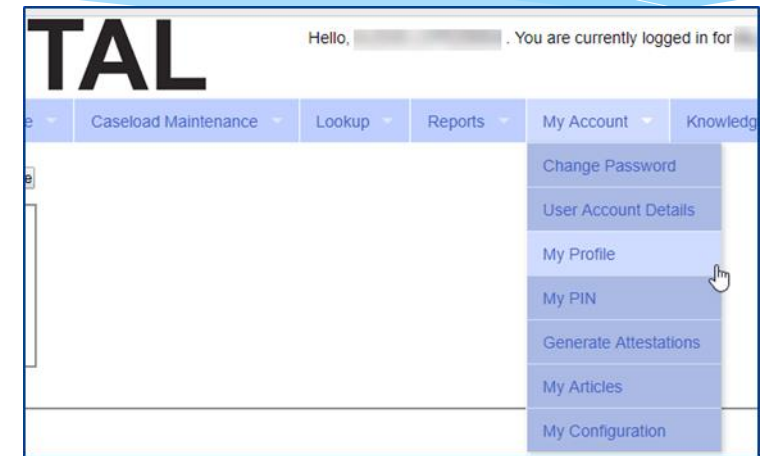
- \* Choosing PIN: **My Account > My Pin**
- \* Enter your PIN number and click the button (“Choose PIN” for first time PIN setup, “Change PIN” for changing current PIN)
- \* Enter your **login password** (**NOT** your pin) to confirm your PIN change and click “Proceed”
  - \* <http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>



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, there is a message "You have already chosen a PIN." followed by a "PIN Number:" label and an input field. To the right of the input field is a button labeled "Change PIN", which is highlighted with a red rectangle. Below the "PIN Selection" section is a "Password Verification" section, which has a close button (X) in its top right corner. This section contains the text "For additional security, please re-enter your login password." followed by a "Password" label and an input field. To the right of the input field is a button labeled "Proceed", which is also highlighted with a red rectangle. In the bottom right corner of the form area, there is a small icon consisting of three diagonal lines.

# 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>

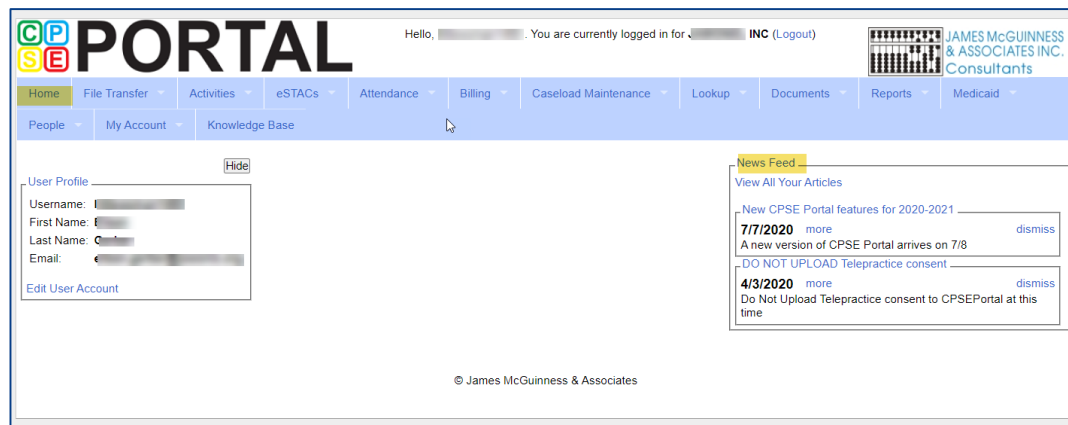
A screenshot of the 'My Profile' page in the TAL application. The page has three tabs: 'Personal and Professional', 'User Information' (which is active), and 'Favorites'. Under the 'User Information' tab, there are four input fields: 'Username', 'Last Name', 'First Name', and 'Email'. Below these fields is a blue '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. The main content area features a User Profile section on the left and a News Feed section on the right. The News Feed section displays a list of articles, including 'New CPSE Portal features for 2020-2021' and 'DO NOT UPLOAD Telepractice consent'.

CPSE PORTAL

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

Home File Transfer Activities eSTACs Attendance Billing Caseload Maintenance Lookup Documents Reports Medicaid

People My Account Knowledge Base

User Profile

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

News Feed

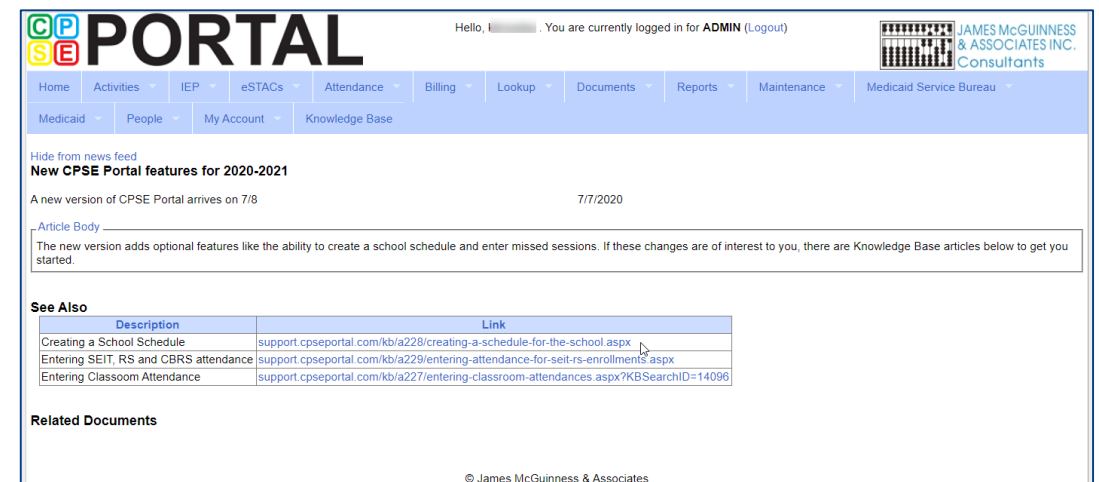
View All Your Articles

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

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Support@CPSEPortal.com



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 displays a list of articles, including 'New CPSE Portal features for 2020-2021' and 'DO NOT UPLOAD Telepractice consent'. Below the list is a 'See Also' section with a table of related documents.

CPSE PORTAL

Hello, [User Name]. 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 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

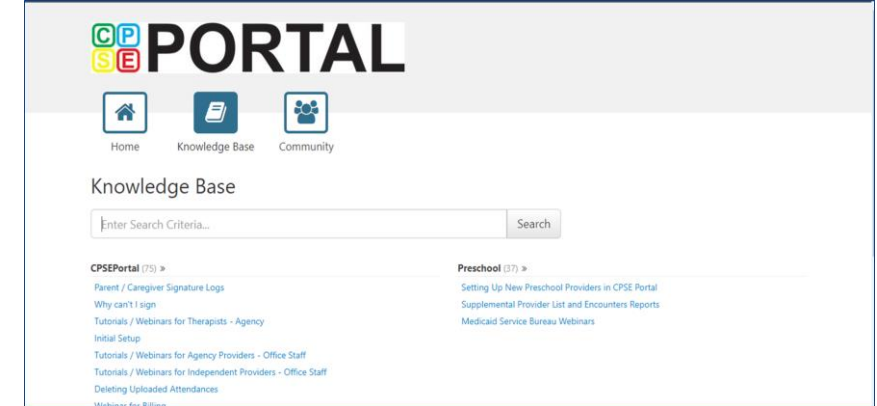
Description	Link
Creating a School Schedule	support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx
Entering SEIT, RS and CBRS attendance	support.cpseportal.com/kb/a229/entering-attendance-for-seit-rs-enrollments.aspx
Entering Classroom Attendance	support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=14096

Related Documents

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# 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

## CPSE Portal Initial Setup – Agency Administrators:

- Thursday, May 12, 2022 @ 10:00AM: <https://attendee.gotowebinar.com/register/2217759355947695631>
- Thursday, May 12, 2022 @ 3:00PM: <https://attendee.gotowebinar.com/register/6711622807854217231>

## Topics Covered During This Webinar:

- Accepting Invitation
- NPI/NPI Lookup
- Inviting Therapists to Use the Portal
- Inviting Agency Staff to Use the Portal (Office User vs. Billing Admin)
- Agency Billing Provider Profile
- Portal Admin User Access
- Resetting Forgotten Passwords
- Changing your Password
- Choosing Your Pin
- Edit My User Information
- My Articles/News Feed
- Knowledge Base.

# 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>

## **Topics Covered During This Webinar:**

- Accepting Invitation
- Logging In
- Changing Password/Forgot Password
- My Pin
- User Profile
- Therapists that Work for Multiple Agencies – One Login
- Knowledge Base

# Upcoming Webinars

## CPSE Portal Credential Verification:

- 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>

## Topics Covered During This Webinar:

- What is credential verification?
- Why do we need credential verification?
- Whose credentials need to be verified?
- Who should complete the verification process?
- Verifying your License.
- Name changes for the NYS Office of Professions.
- Verifying your NPI #.
- Name Changes for NPPES.

# Upcoming Webinars

## CPSE Portal Case Management:

### Agency:

- Thursday, June 2, 2022 @ 10:00AM: <https://attendee.gotowebinar.com/register/7984653863475373582>
- Friday, June 3, 2022 @ 2:00PM: <https://attendee.gotowebinar.com/register/7793264073451739916>

### Topics Covered During This Webinar:

- Child Lookup
- Unmatched Children and Enrollments
- Assigning Children to Therapist/SEIT
- View Unmatched Enrollments
- Matching Children
- Matching Enrollments
- Moving Attendances Between Enrollments
- Enrollment Lookup Report
- Enrollment Assignments Report



# Upcoming Webinars

## **CPSE Portal Case Management: Center Based (CB) Agencies:**

- Thursday, June 2, 2022 @ 1:30PM:  
<https://attendee.gotowebinar.com/register/2360919068726820623>
- Friday, June 3, 2022 @ 10:00AM:  
<https://attendee.gotowebinar.com/register/4833781192734662159>

## **Topics Covered During This Webinar:**

- Classroom Management
- Creating a Schedule for the School
- Unmatched Children and Enrollments
- Entering and Signing Classroom Attendance
- CB Enrollments Missing Attendance

# Upcoming Webinars

## **CPSE Portal Case Management: Independent Providers:**

- Wednesday, June 8, 2022 @ 10:00AM:  
<https://attendee.gotowebinar.com/register/8782718985334076684>
- Friday, June 10, 2022 @ 4:00PM:  
<https://attendee.gotowebinar.com/register/989090296588105484>

## **Topics Covered During This Webinar:**

- Child Lookup
- Unmatched Children and Enrollments
- Enrollment Lookup Report
- My Caseload
- Prescriptions for Caseload
- Moving Attendances Between Enrollments

# Upcoming Webinars

## **CPSE Portal Case Management:**

### **Agency Service Providers:**

- Friday, June 10, 2022 @ 10:00AM:  
<https://attendee.gotowebinar.com/register/4116497190169144588>
- Tuesday, June 14, 2022 @ 4:00PM  
<https://attendee.gotowebinar.com/register/363117436174370316>

## **Topics Covered During This Webinar:**

- Child Lookup
- My Caseload
- Prescriptions for Caseload

# Upcoming Webinars

## CPSE Portal Session Notes:

- Tuesday, June 14, 2022 @ 10:00AM  
<https://attendee.gotowebinar.com/register/6770111329202654990>
- Friday, June 17, 2022 @ 10:00AM  
<https://attendee.gotowebinar.com/register/7434706734565390091>
- Friday, June 17, 2022 @ 4:00PM  
<https://attendee.gotowebinar.com/register/9067654125138351115>
- Tuesday, June 21, 2022 @ 10:00AM  
<https://attendee.gotowebinar.com/register/3675643604966749452>

# Upcoming Webinars

## **CPSE Portal Session Notes:**

- Tuesday, June 21, 2022 @ 2:00PM  
<https://attendee.gotowebinar.com/register/1750392147661269772>

## **Topics Covered During This Webinar:**

- Recap Entering/Signing Classroom Attendance
- Attendance Entry Record
- Signing Attendance/Review & Sign
- Co-Signing Session Notes/Attendance
- Un-signing Attendance/Making Corrections After Signing
- Move Attendances Between Enrollments
- Print Child Treatment Log
- Print Parent Signature Log

# Knowledge Base Links

- \* Template to Import Multiple Therapists & Portal Profession Codes:
  - \* <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175>
- \* Forgot Your Password:
  - \* <http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316>
- \* Choosing A PIN:
  - \* <http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>
- \* Edit My User Information:
  - \* <http://support.cpseportal.com/kb/a59/edit-my-user-information.aspx?KBSearchID=16250>

# 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](mailto:support@CPSEPortal.com)