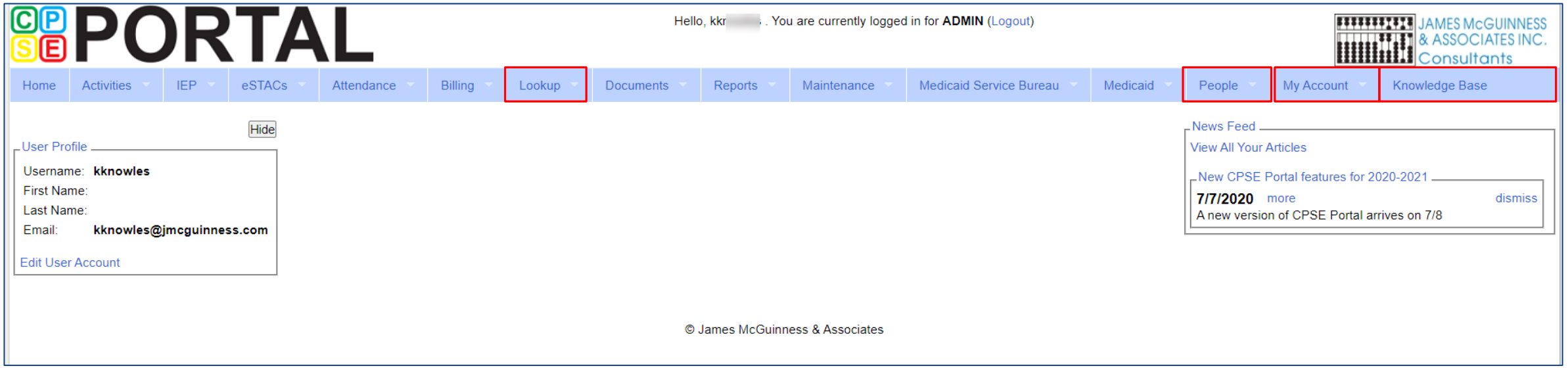
JAMES McGUINNESS & ASSOCIATES INC.
Consultants

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

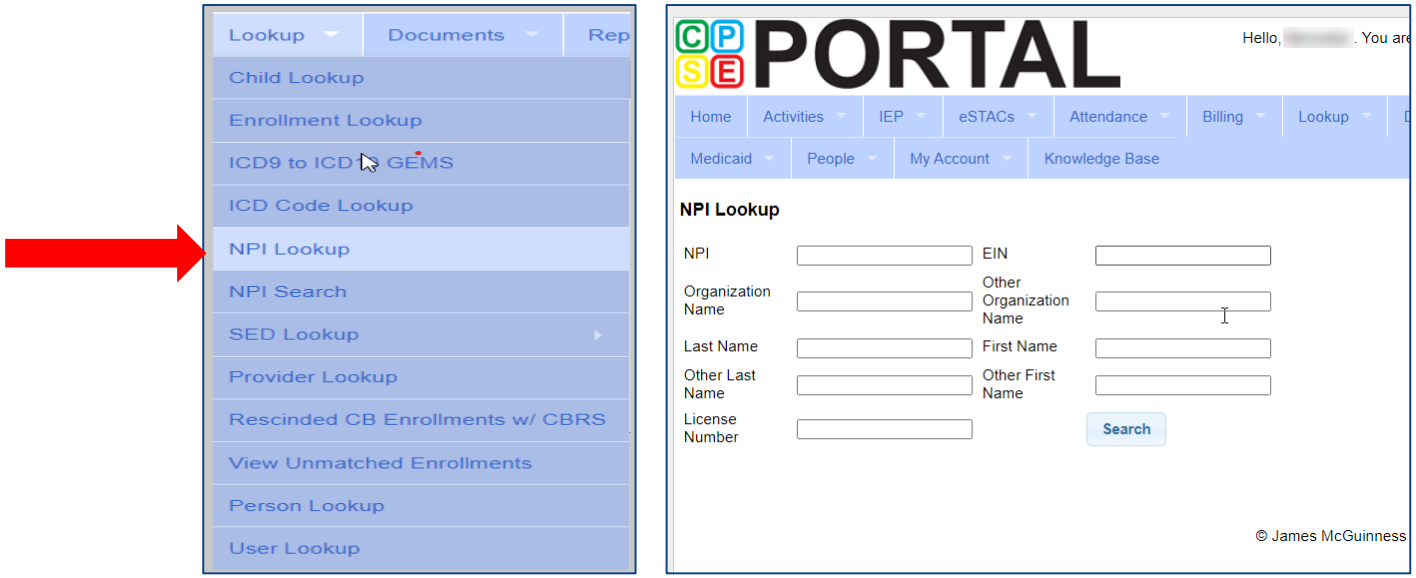

CPSE PORTAL
Hello, kkr . You are currently logged in for ADMIN (Logout)
JAMES McGUINNESS & ASSOCIATES INC. Consultants
Home
Activities
IEP
eSTACs
Attendance
Billing
Lookup
Documents
Reports
Maintenance
Medicaid Service Bureau
Medicaid
People
My Account
Knowledge Base
Hide
User Profile
Username: kknowles
First Name:
Last Name:
Email: kknowles@jmcguinness.com
Edit User Account
News Feed
View All Your Articles
New CPSE Portal features for 2020-2021
7/7/2020 more dismiss
A new version of CPSE Portal arrives on 7/8
© 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.

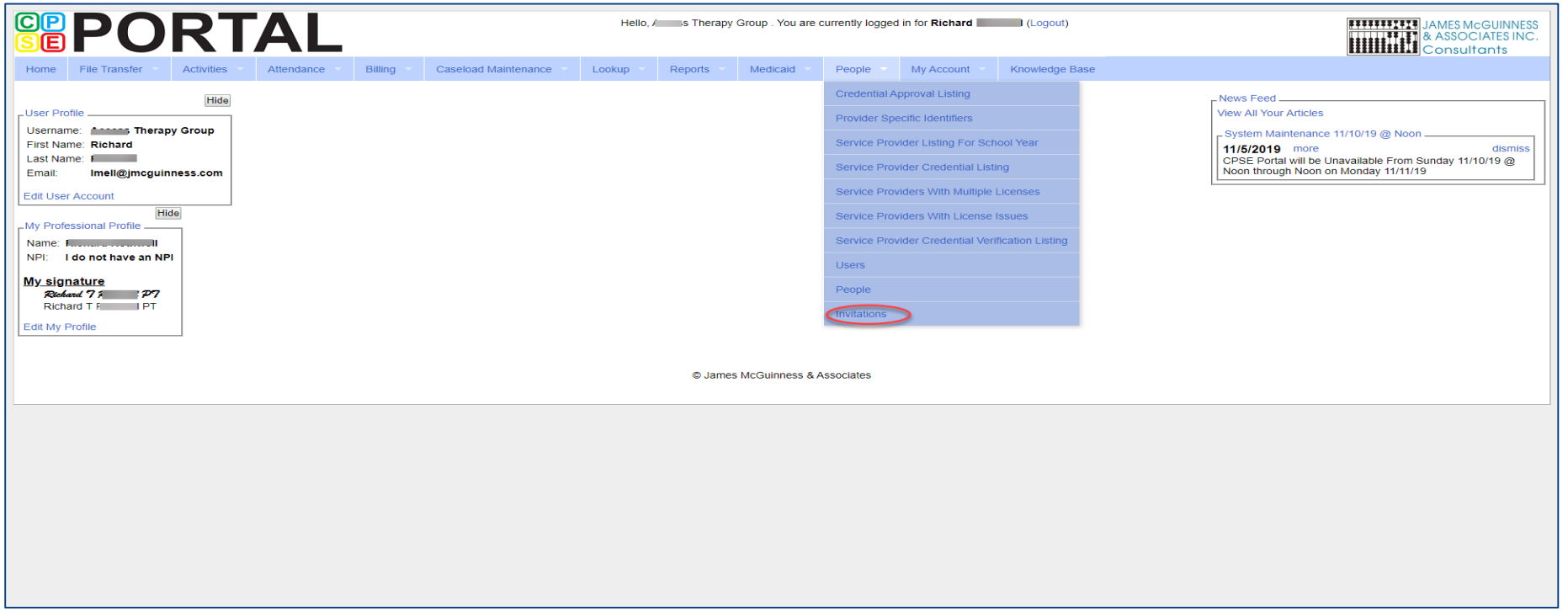
NPI Lookup

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***.



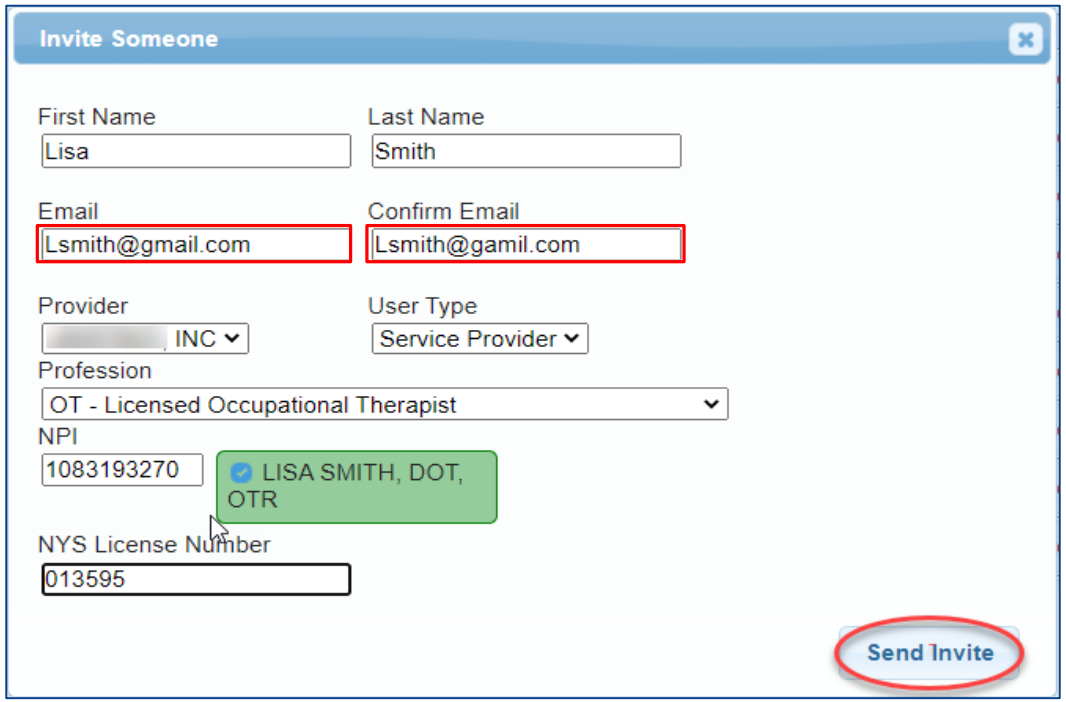
Portal Invitations – Single Service Provider Invite

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***.



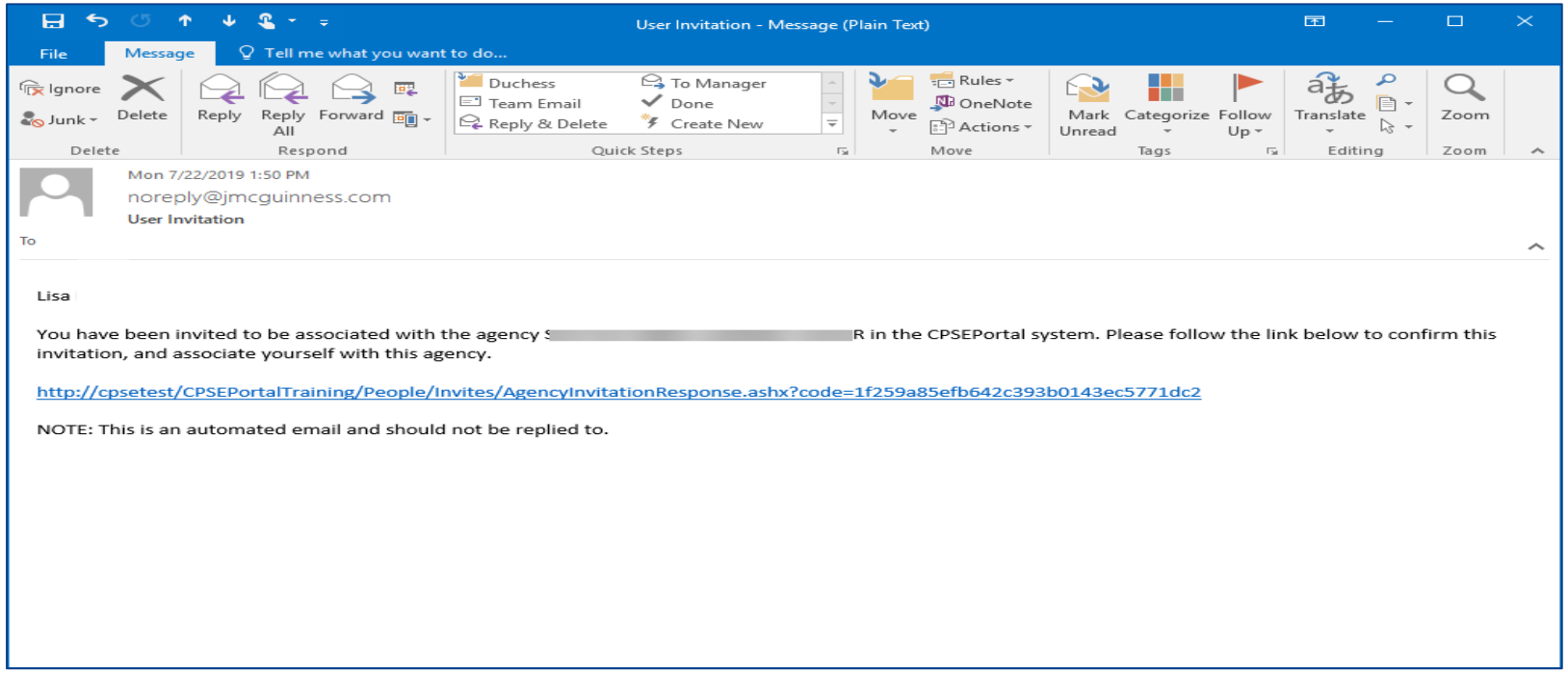
Portal Invitations – Single Service Provider Invite

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***."



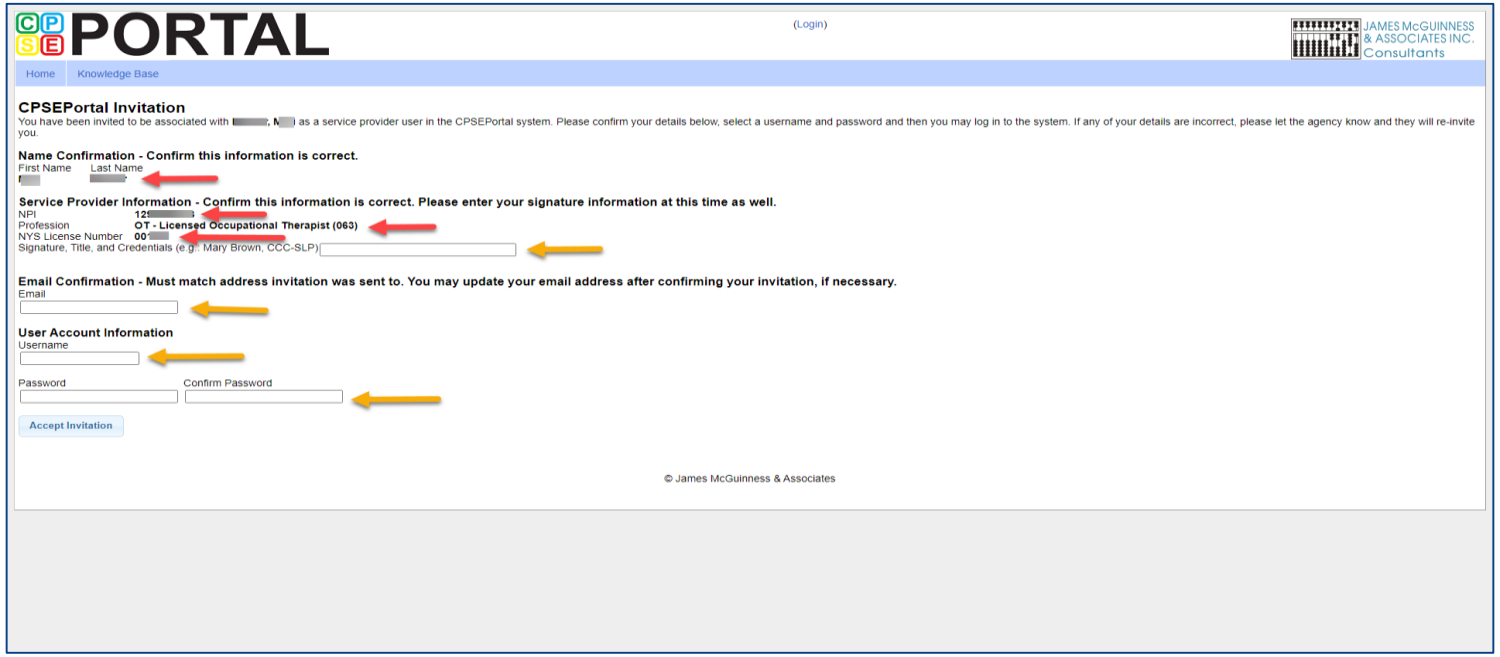
Portal Invitations – Single Service Provider Invite Sample Email

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.



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:

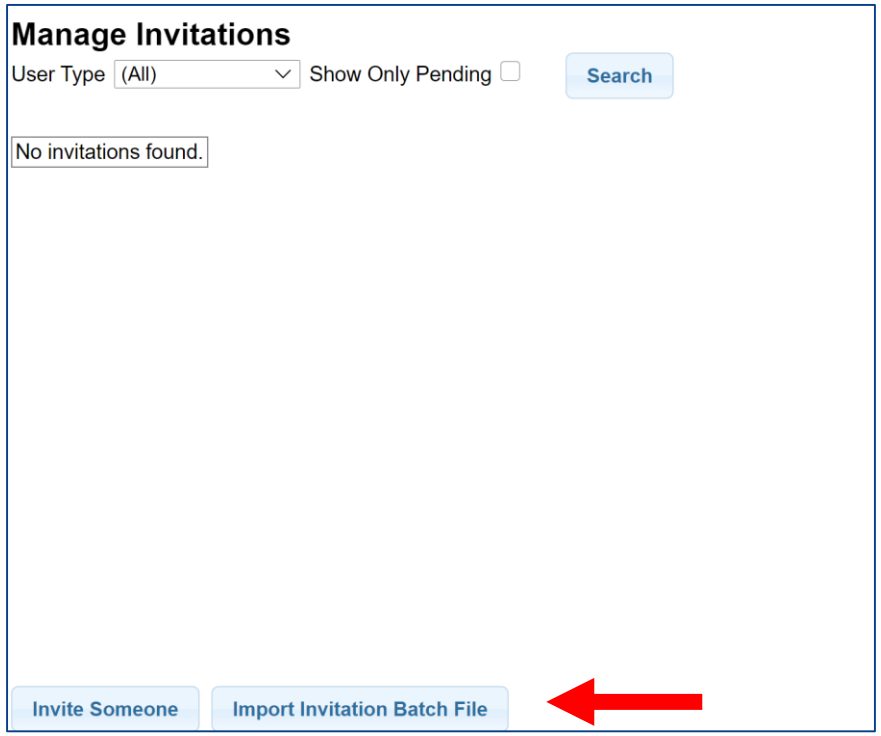
Profession Code	Description
AIDE	Classroom or 1:1 AIDE
AUD	Audiologist
CFY	Clinical First Year
COTA	Certified Occupational Therapist Assistant
CSP	Certified School Psychologist
CSW	Clinical Social Worker
INT	Bilingual Interpreter
LCSW	Licensed Clinical Social Worker
LMSW	Licensed Master Social Worker
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***.

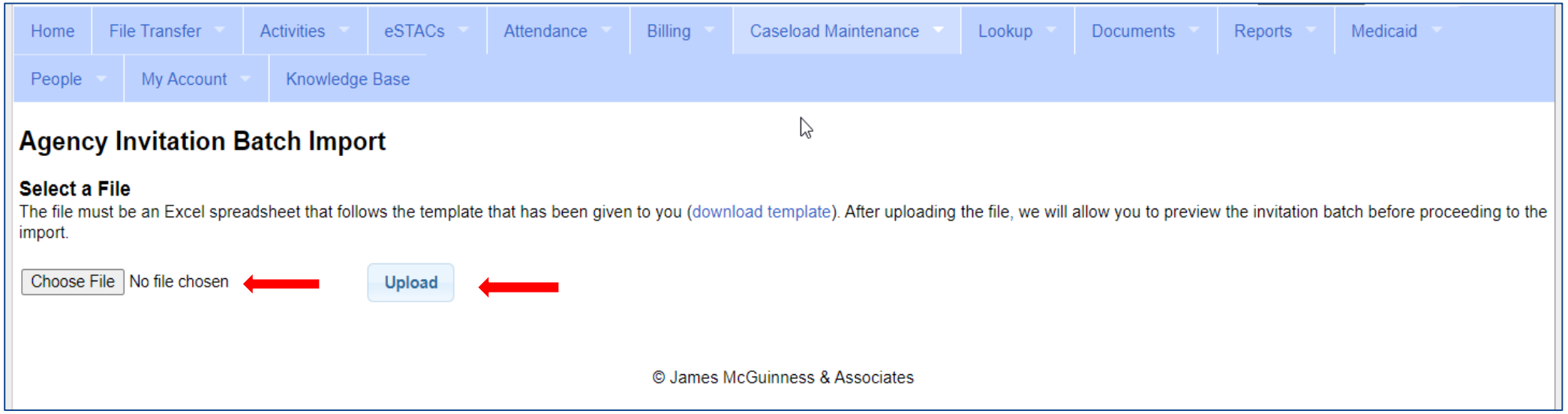
Invitations – Multiple User Template

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



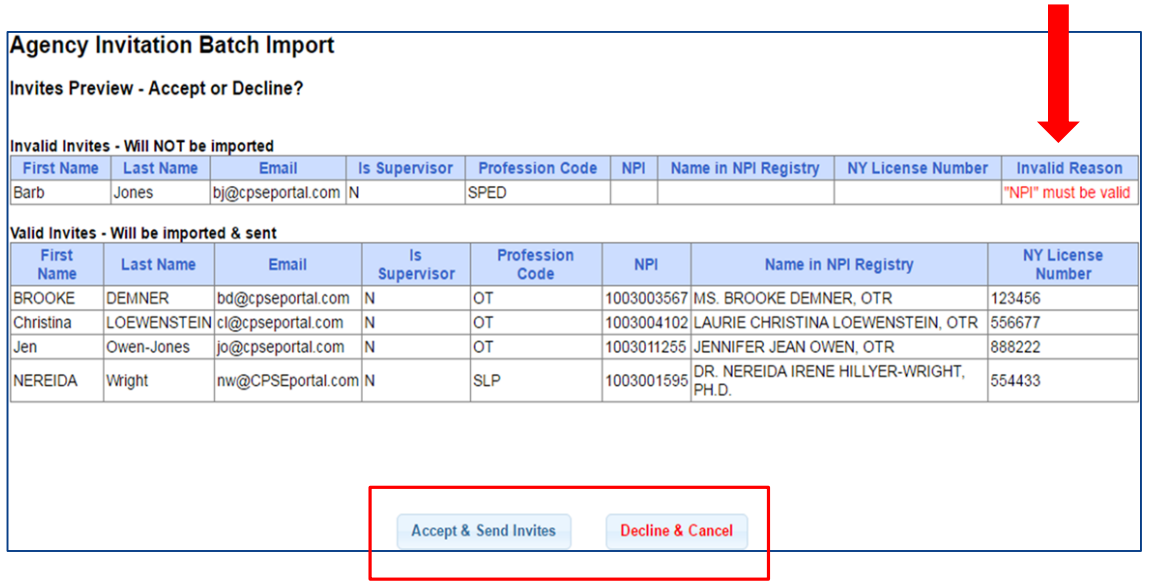
Invitations – Multiple User Template
Upload Template

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



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

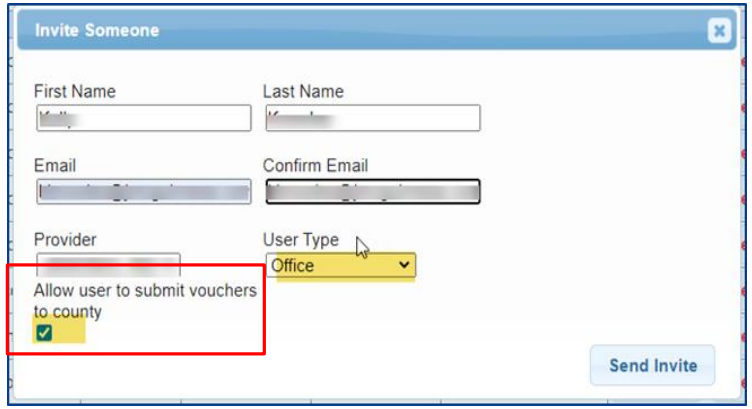
Valid Invites - Will be imported & sent

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

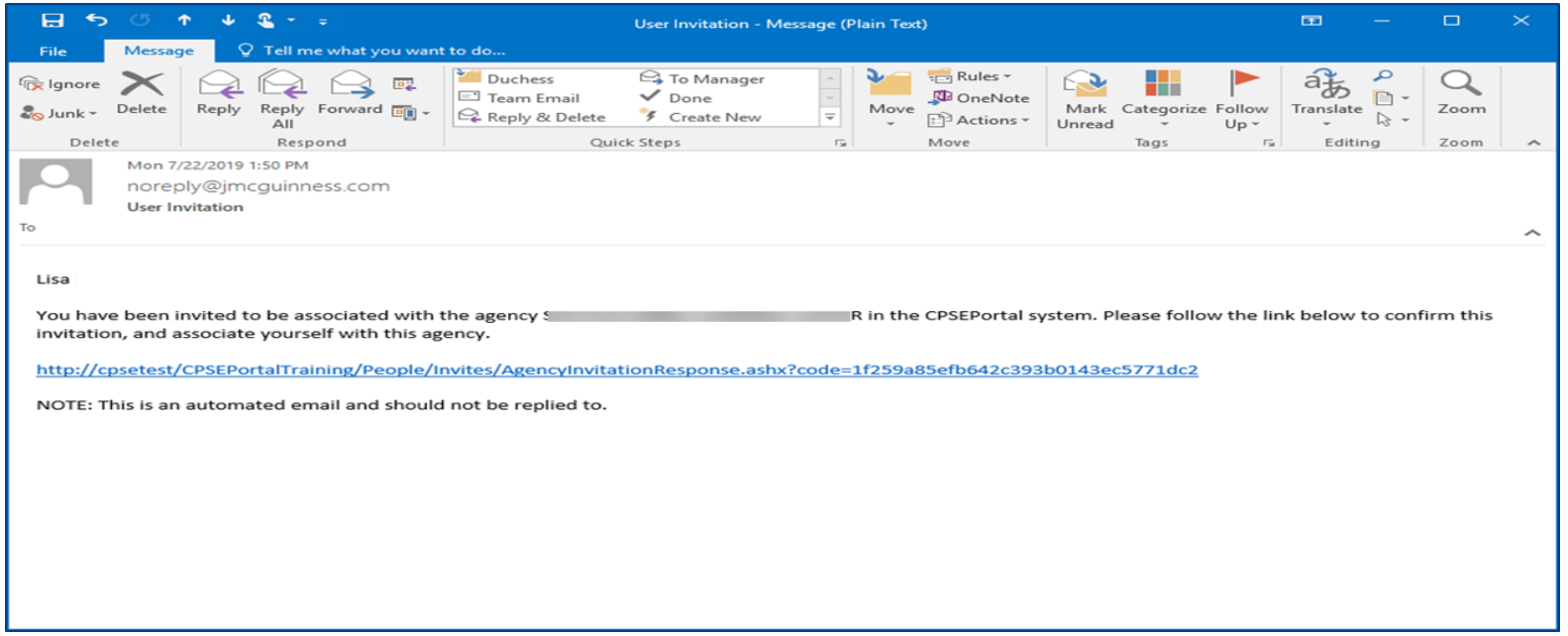
Portal Invitation – Office User

* 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**".



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.



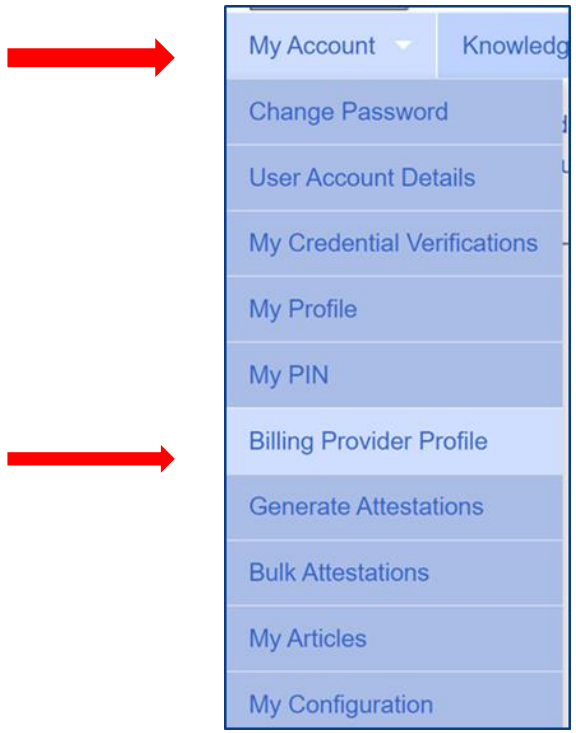
Portal Invitation – Office User

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.

Agency Billing Provider Profile

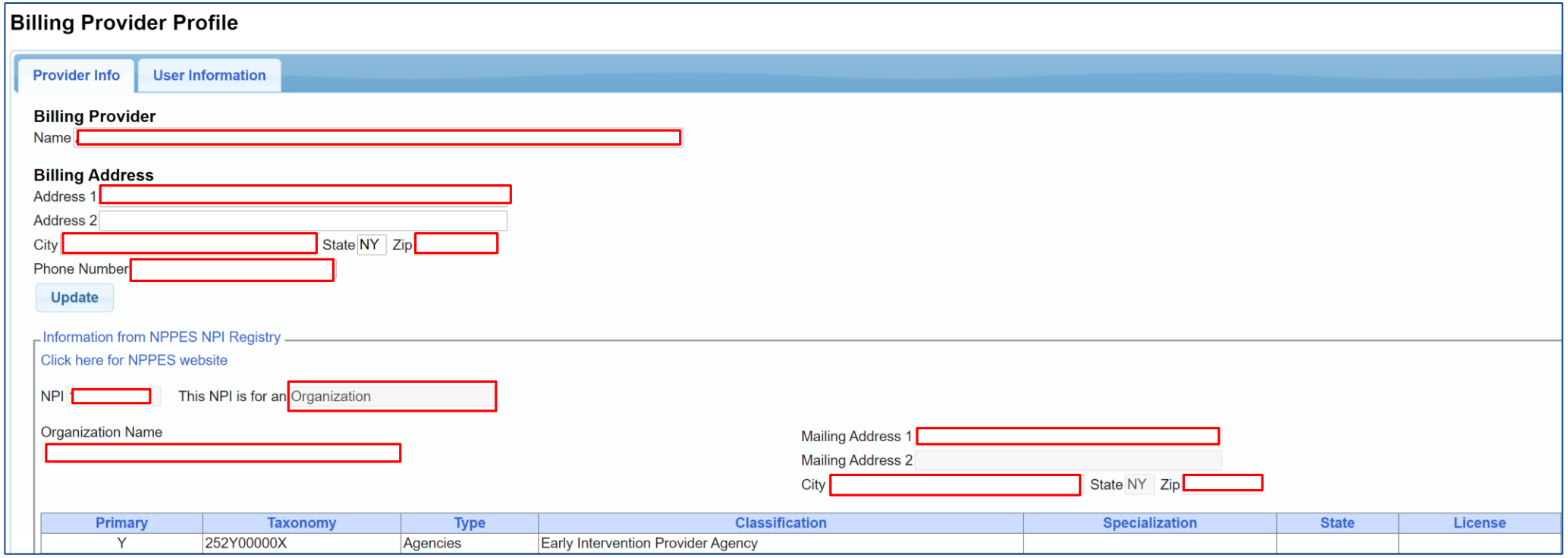
* Agencies will need to create a Billing Provider Profile.

* Go to ***My Account > Billing Provider Profile***



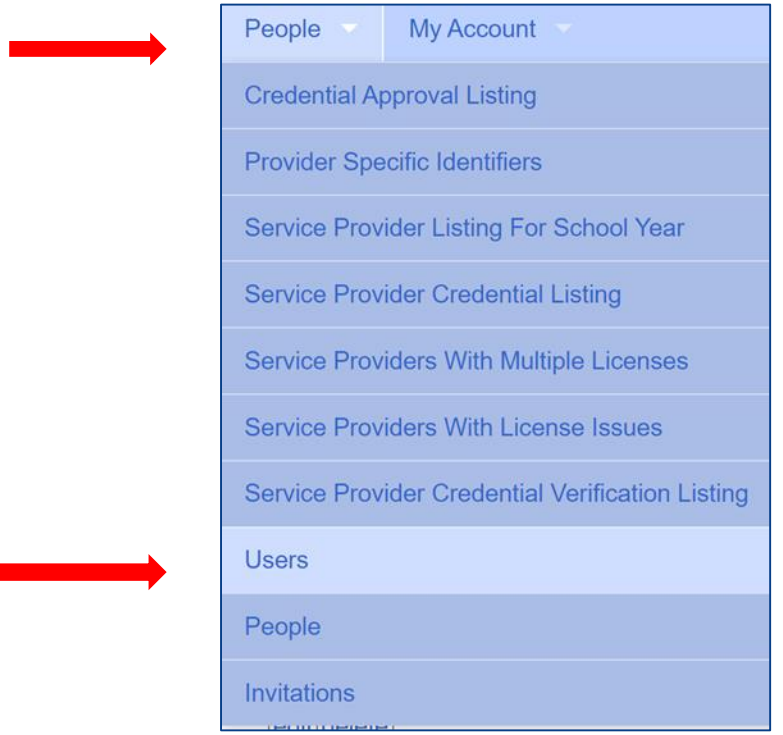
Agency Billing Provider Profile

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



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

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

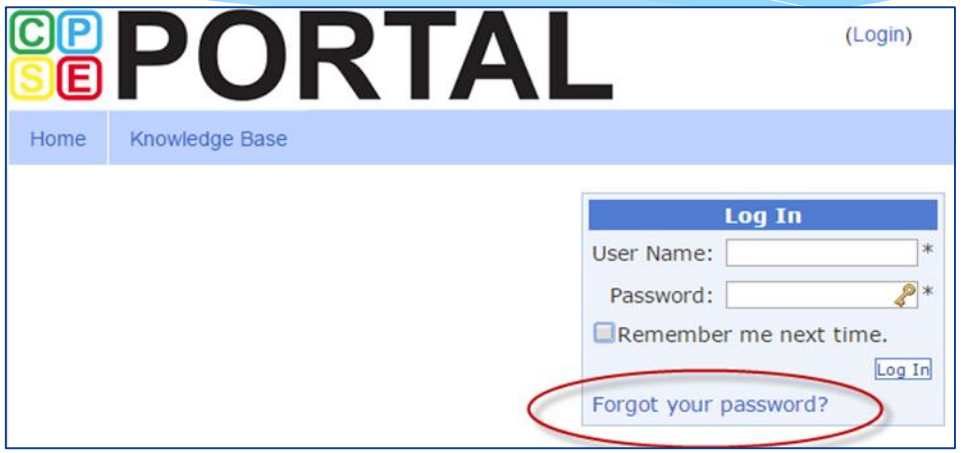
- Admin-(management/ administrators) can submit vouchers on behalf of the agency
- Basic- (clerical/billing staff)
- Supervisor (UDO/USO)
- QA Supervisor (quality assurance supervisor)

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.

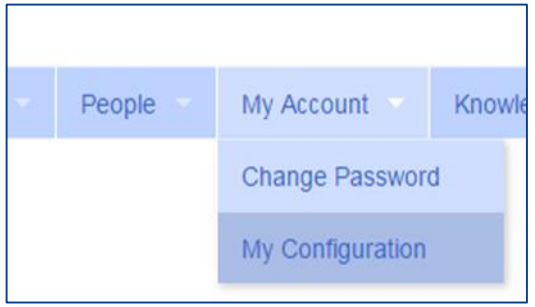
* On the Password Recovery page, enter your user name and click Submit. You will be emailed a new password.

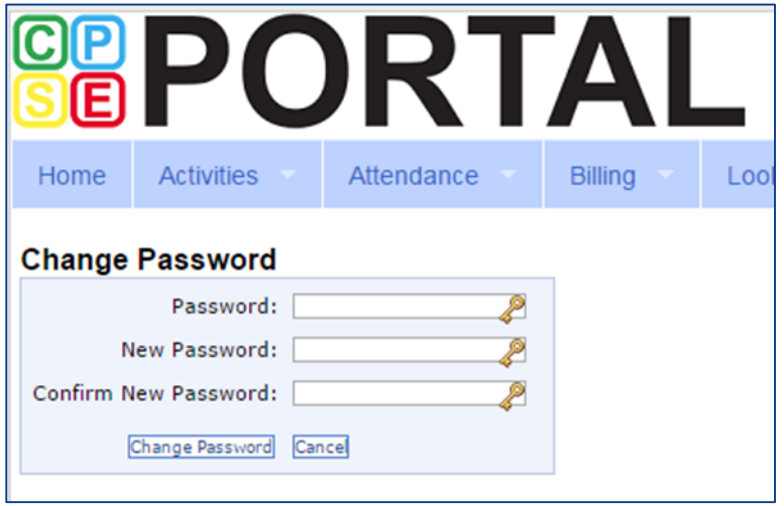
* ***http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316***



Changing Your Password

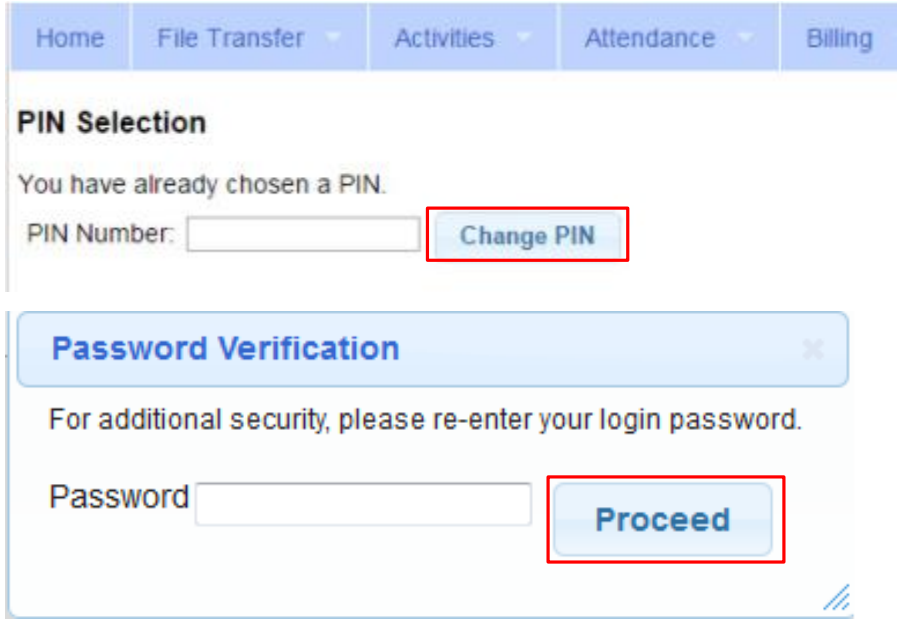
* Go to ***My Account > Change Password.***
* Enter your current password in the password field.
* Enter your New Password.
* Re-enter your New Password to confirm it was entered correctly.
* ***http://support.cpseportal.com/kb/a14/change-password.aspx?KBSearchID=16315***





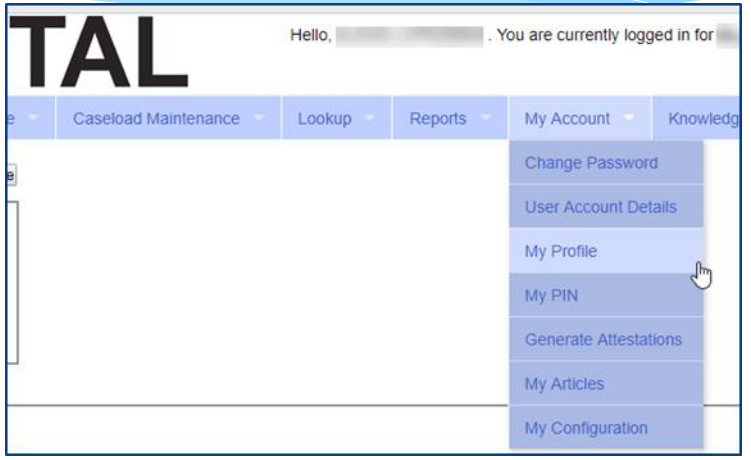
Choosing Your PIN

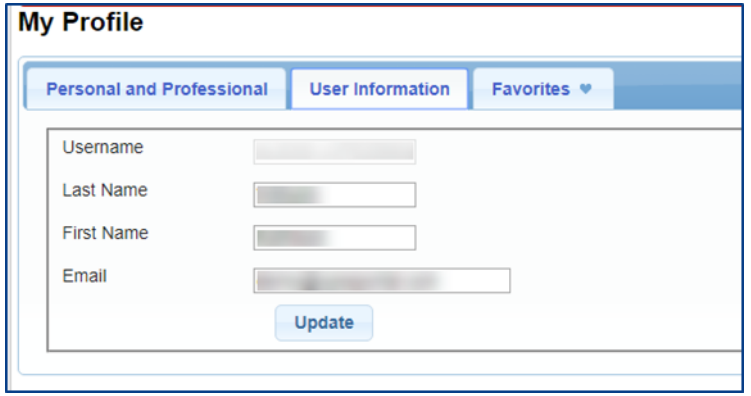
* Choosing PIN: ***My Account > My Pin***
* Enter your PIN number and click the button ("Choose PIN" for first time PIN setup, "Change PIN" for changing current PIN)
* Enter your **login password** (**NOT** your pin) to confirm your PIN change and click "Proceed"
  * ***http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318***



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***

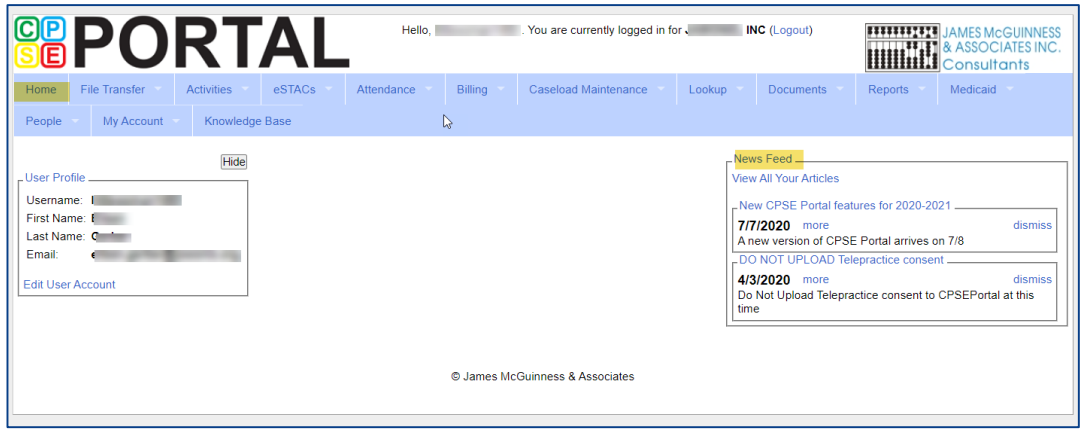




News Feed / My Articles

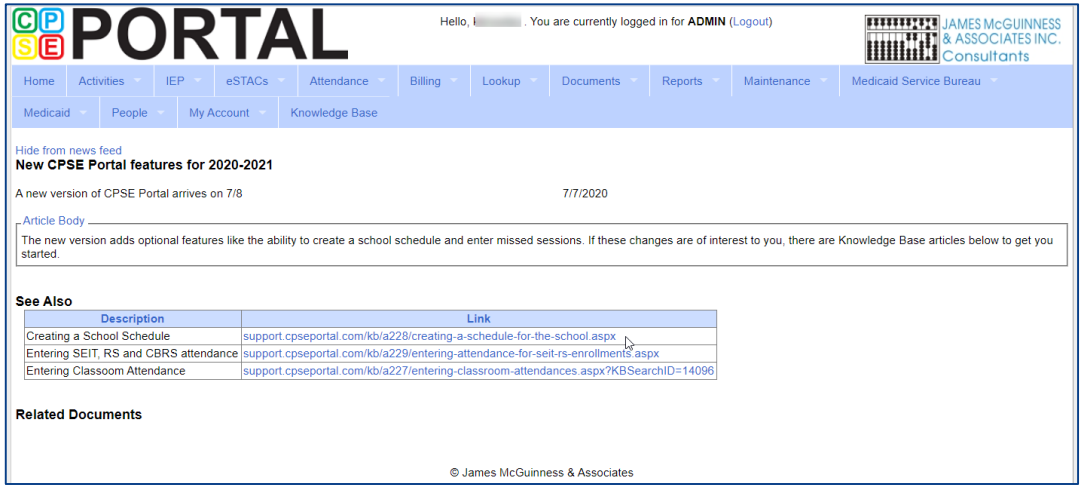
News Feed contains current articles and updates to the Portal. News Feed can be found in 2 ways.

Your current News Feed will be located on your Home Page



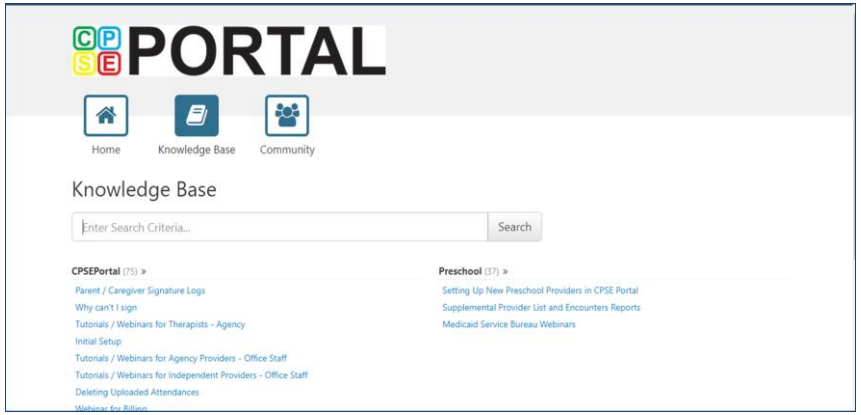
For all News Feed articles:

My Account->My Articles->View



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/5325796654973563 04*
- 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/6915530559391243*
- 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/7428172838447042 68*
- 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/9890902965881054 84

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/3631174361743703l6

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***