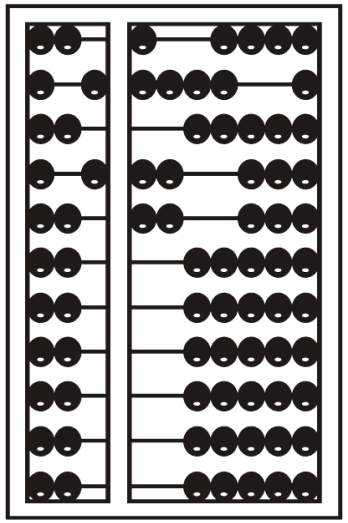
JAMES McGUINNESS & ASSOCIATES INC.
Consultants

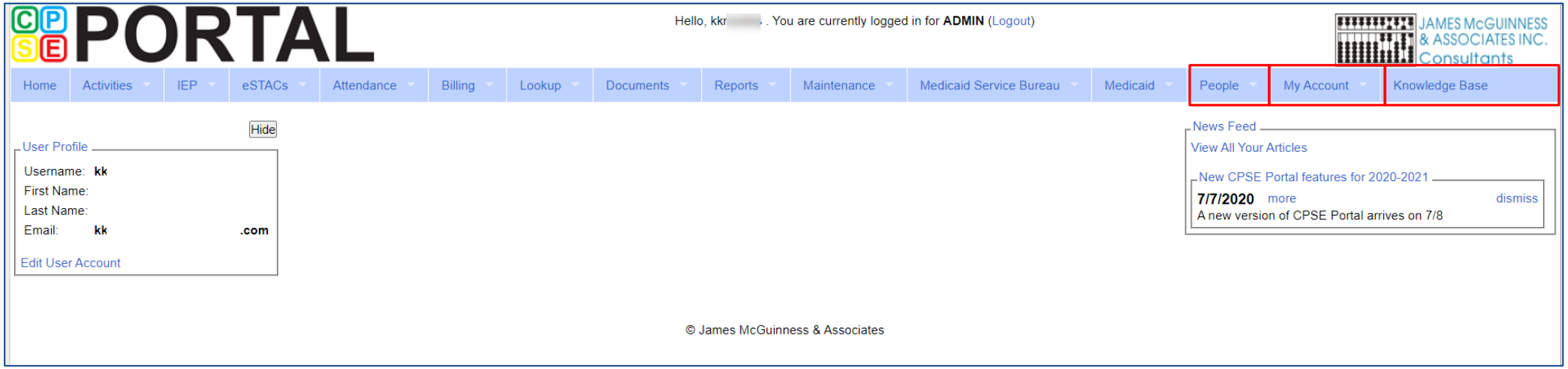


CPSE Portal
Initial Setup
Agency Service Providers
and
Independent Providers

TOPICS COVERED

- **Accepting Invitation**
  - Therapists that work for multiple agencies have one login
- **Portal Invitations**
  - Sample Email Invite
  - Accepting Invitation
- **Billing Provider Profile (Independent Providers ONLY)**
- **Choosing Your PIN**
- **Resetting Forgotten Password**
- **Changing Your Password**
- **Edit My User Information**
- **My Articles/News Feed**
- **Knowledge Base**
- **Upcoming Webinars**
- **Closing Remarks and CPSE Portal Support Information**

CPSE Portal



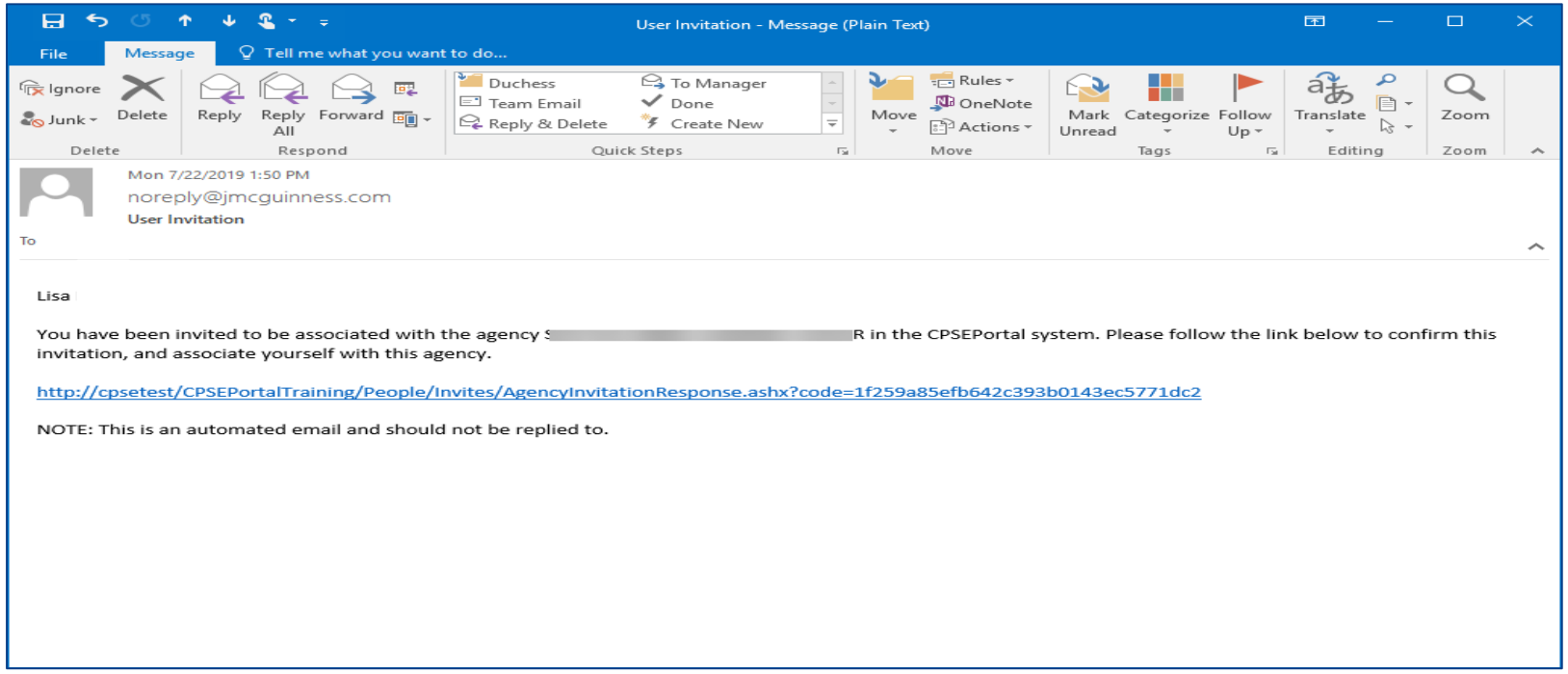
Support@CPSEPortal.com

Portal Invitations

* The agency is the primary link between the CPSE Portal & service providers.
* Agencies will send an email invitation to a Service Provider to join the Portal.
* The service provider will click the link in the email and set up your username, password, and PIN.
* The county will send Independent Providers an email invitation to join the Portal.
* Independent providers will need to click the link in the email and set up your username, and password, and create a PIN for submitting vouchers to the county.
* When creating your log on information, make sure that your **NPI, license number, and email address** are correct. This is especially important for service providers who work for multiple agencies.

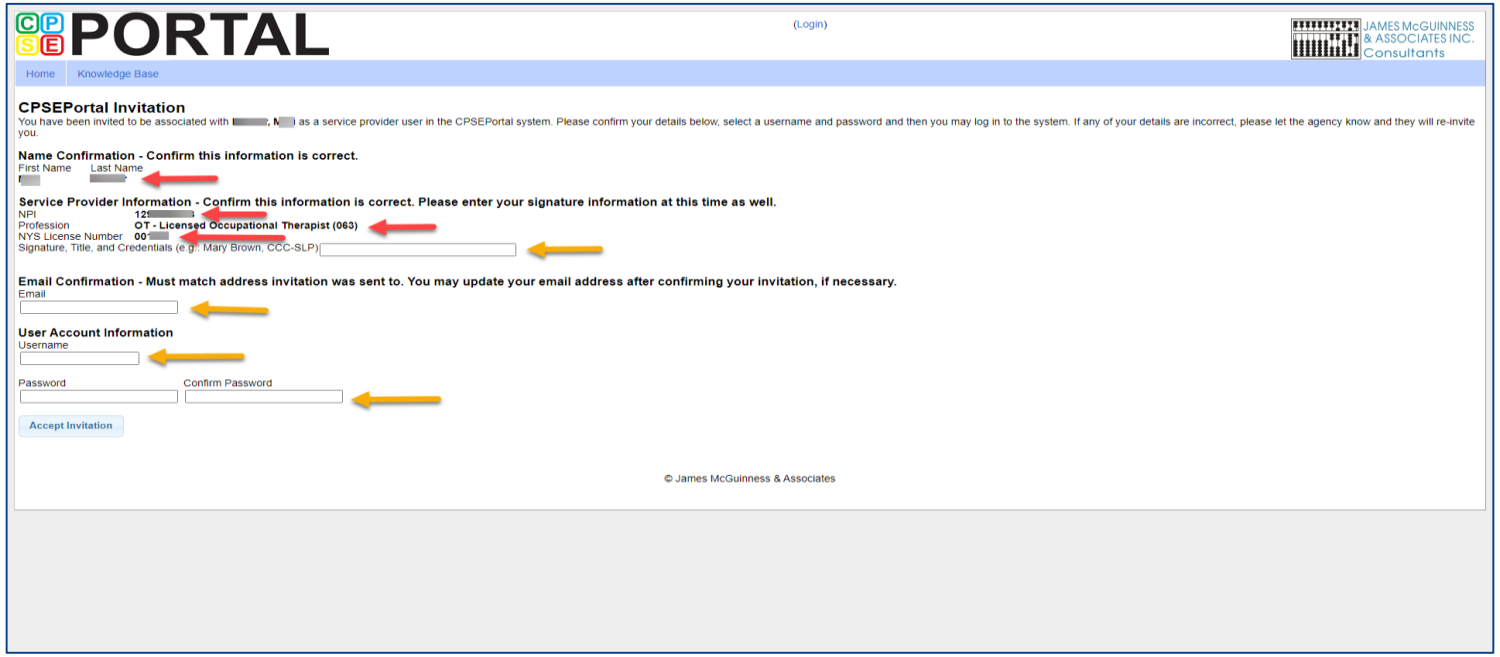
Portal Invitations - Sample Email Invite

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



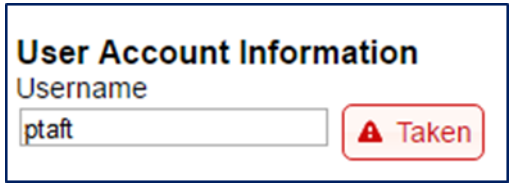
Portal Invitations – Accepting Invitation

This screen comes up after the provider clicks the link. The service provider/independent 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.

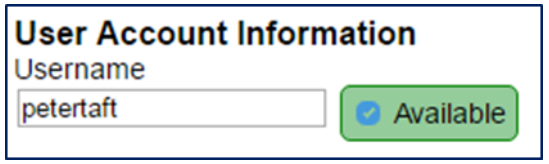


Choosing Username and Password

* 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:



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

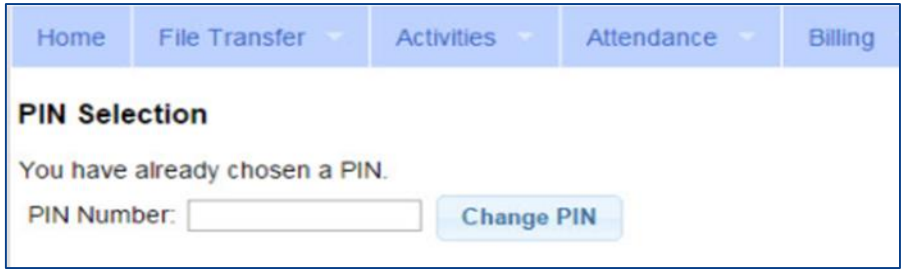


* Choose a password that is strong but that you can remember and reenter to confirm it.

Choosing Your PIN

* Go to ***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***

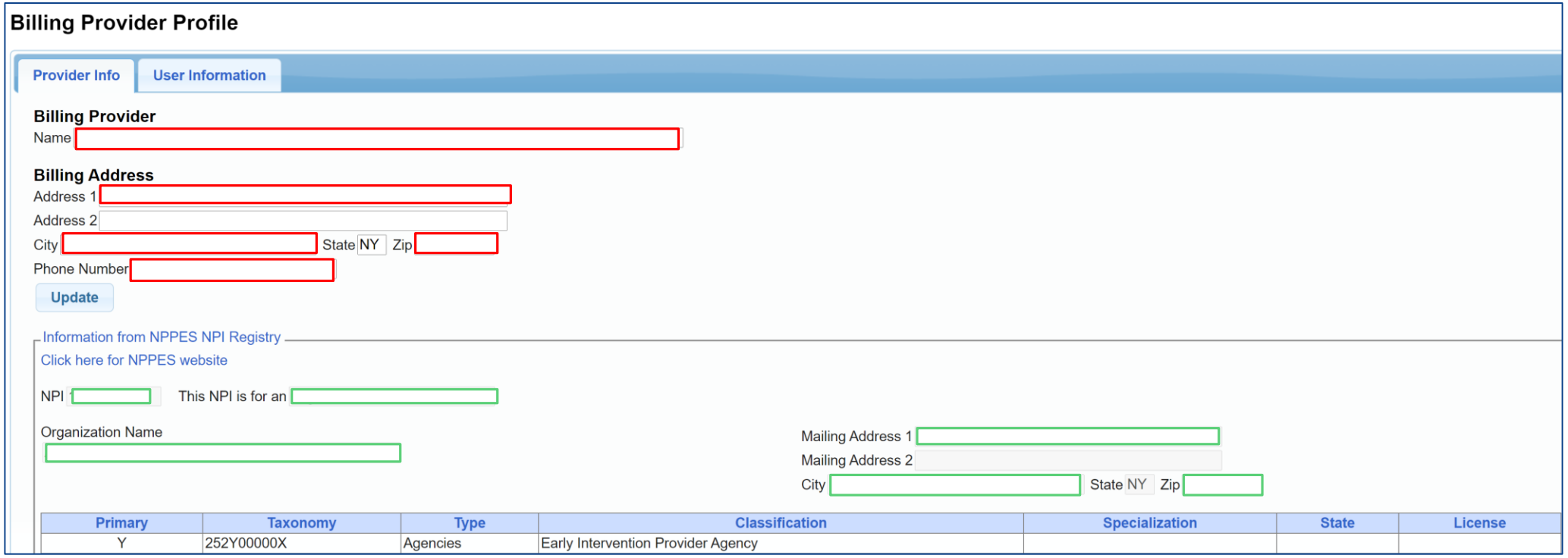
Billing Provider Profile – Independent Providers **ONLY**

* Independent Providers **ONLY** will need to create a Billing Provider Profile in order to bill the county.

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

Billing Provider Profile – Independent Providers ONLY

All information entered on this screen will **ONLY** be the Independent Providers information.

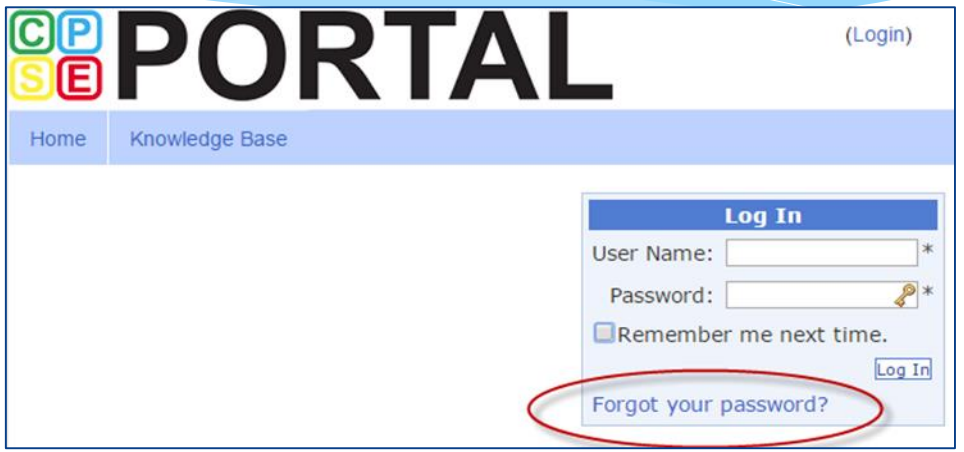


Resetting Forgotten Passwords

* 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.

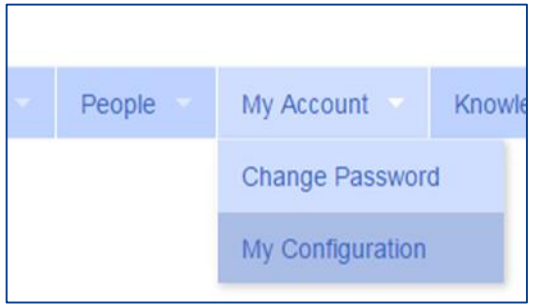
* On the Password Recovery page, enter your user name and click Submit. You will be emailed a new password.

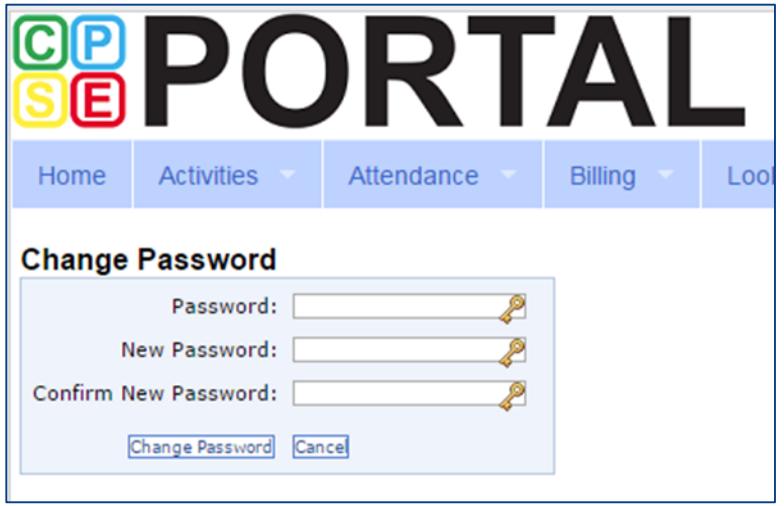
  * *http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316*



Changing Your Password

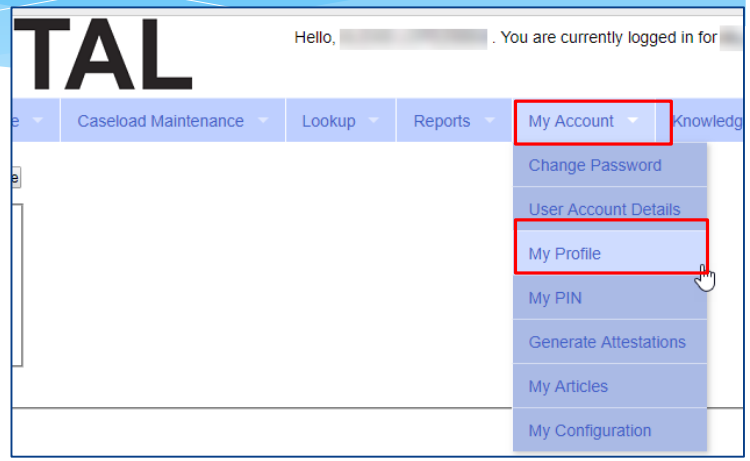
* Go to ***My Account > Change Password.***
* Enter your current password in the password field.
* Enter your New Password.
* Re-enter your New Password to confirm it was entered correctly.
* ***http://support.cpseportal.com/kb/a14/change-password.aspx?KBSearchID=16315***

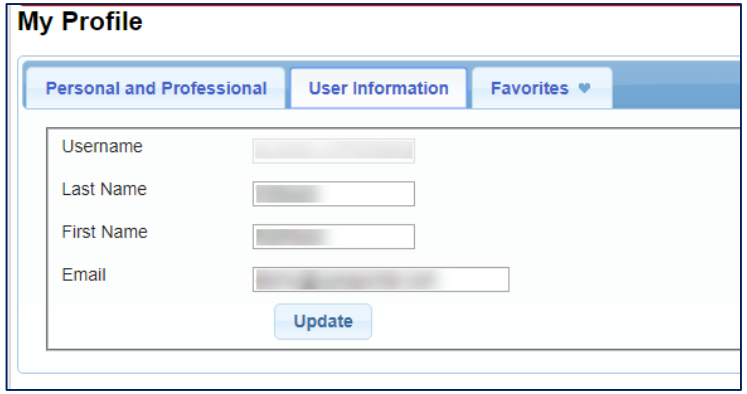




Edit My User Information

* Go to ***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***

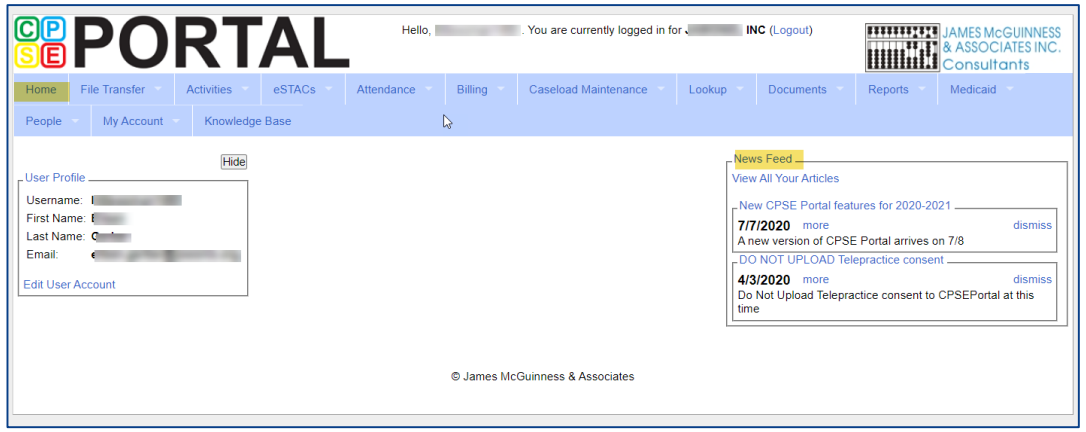




News Feed / My Articles

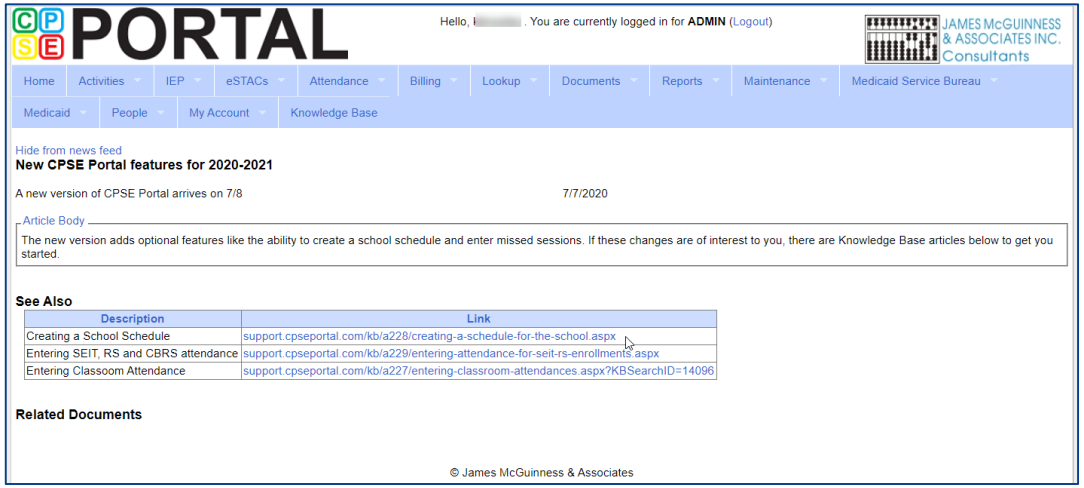
News Feed contains current articles and updates to the Portal. News Feed can be found in 2 ways.

Your current News Feed will be located on your Home Page



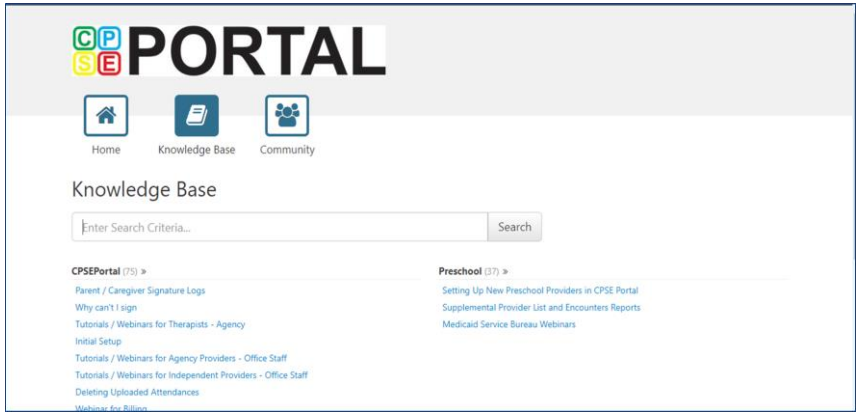
For all News Feed articles:

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 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/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:
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/3631174361743703 16

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

* 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***