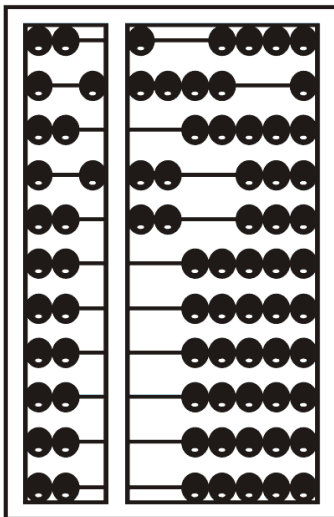


JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants




# 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



Hello, kkr [redacted]. 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**

User Profile

Username: **kk**

First Name:

Last Name:

Email: **kk** .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

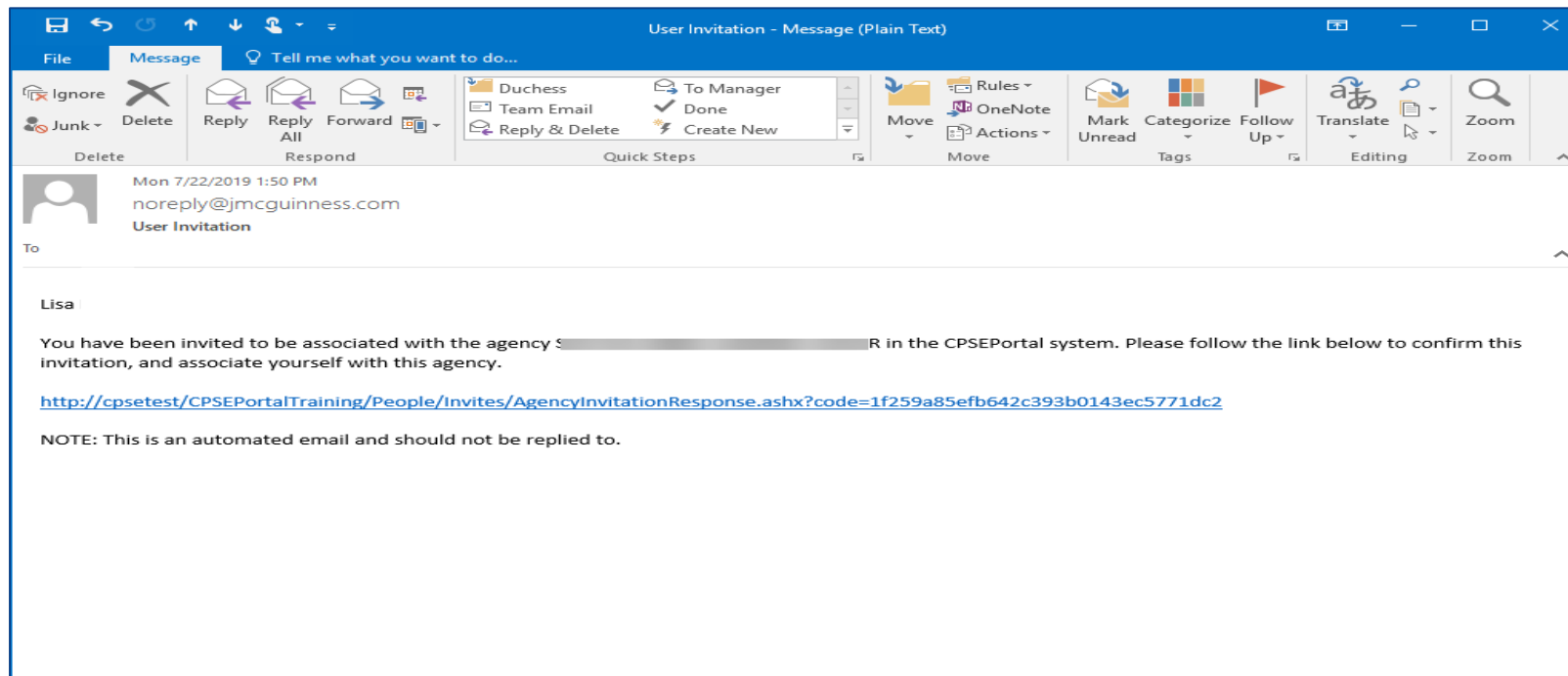
© James McGuinness & Associates

# Portal 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.

The screenshot shows the CPSEPortal Invitation form. The form is titled "CPSEPortal Invitation" and includes a header with the CPSE logo and "PORTAL" text. The main content area contains several sections with input fields and a "Accept Invitation" button. Red arrows point to fields that must be confirmed, and yellow arrows point to fields that must be filled in. The "Accept Invitation" button is located at the bottom of the form.

**CPSEPortal Invitation**  
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.

**Name Confirmation - Confirm this information is correct.**  
First Name [redacted] Last Name [redacted]

**Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.**  
NPI [redacted] Profession [redacted] OT - Licensed Occupational Therapist (062)  
NYS License Number 00 [redacted] Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP) [redacted]

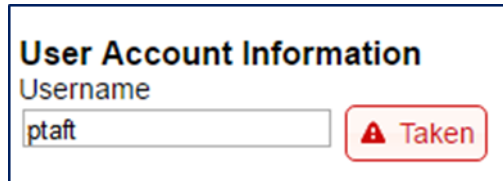
**Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.**  
Email [redacted]

**User Account Information**  
Username [redacted]  
Password [redacted] Confirm Password [redacted]

© James McGuinness & Associates

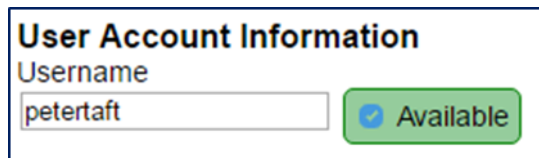
# Choosing Username and Password

- \* 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  
 ⚠ Taken

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

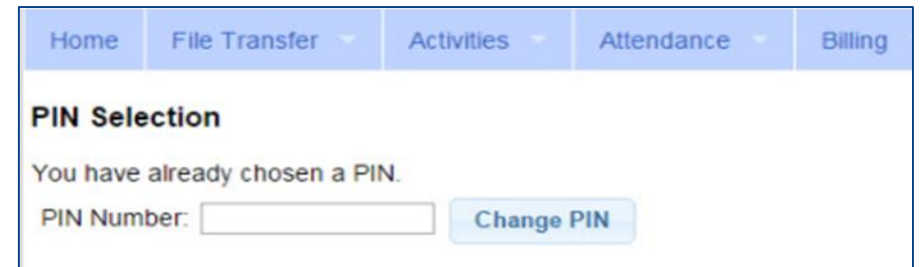


**User Account Information**  
Username  
 ✔ Available

- \* 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>



The screenshot shows a web interface with a navigation bar at the top containing links for Home, File Transfer, Activities, Attendance, and Billing. Below the navigation bar, the page title is "PIN Selection". The main content area displays the message "You have already chosen a PIN." followed by a text input field labeled "PIN Number:" and a blue button labeled "Change PIN".



The screenshot shows a "Password Verification" dialog box. The title bar of the dialog is blue and contains the text "Password Verification" and a close button (X). The main text inside the dialog reads "For additional security, please re-enter your login password." Below this text is a text input field labeled "Password" and a blue button labeled "Proceed".



# 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.

**Billing Provider Profile**

Provider Info | User Information

**Billing Provider**  
Name

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

Information from NPPES NPI Registry  
[Click here for NPPES website](#)

NPI  This NPI is for an

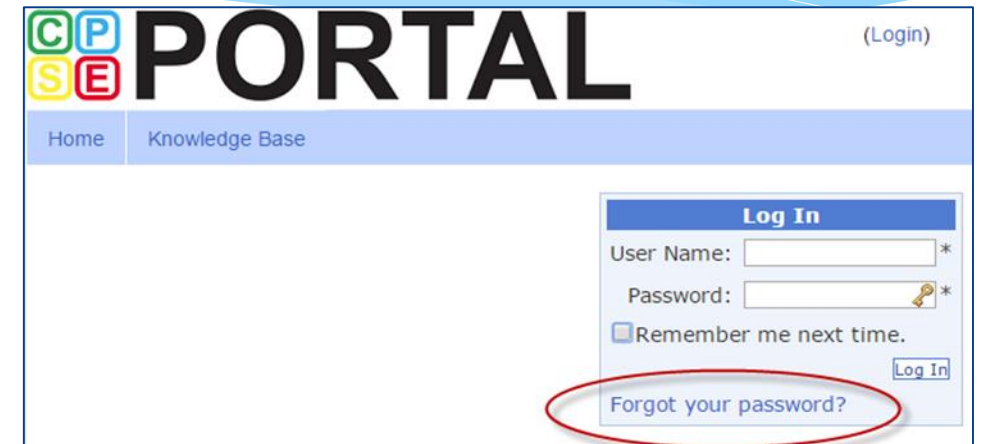
Organization Name

Mailing Address 1   
Mailing Address 2   
City  State NY Zip

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	252Y00000X	Agencies	Early Intervention Provider Agency			

# 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**

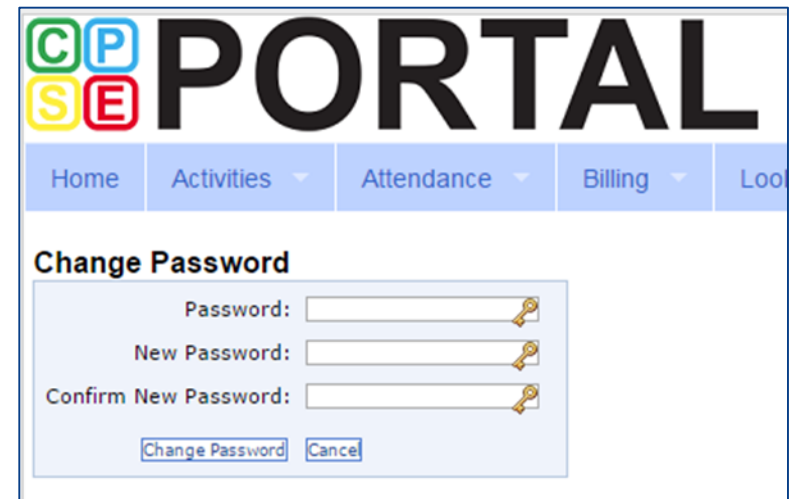
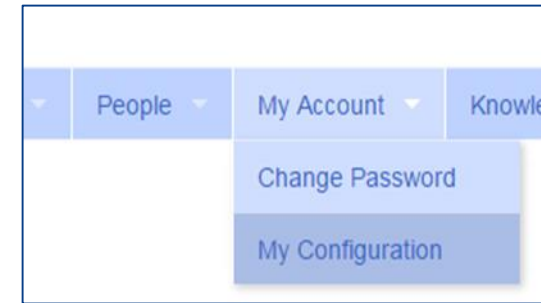
**Forgot Your Password?**

Enter your User Name to receive your password.

User Name:

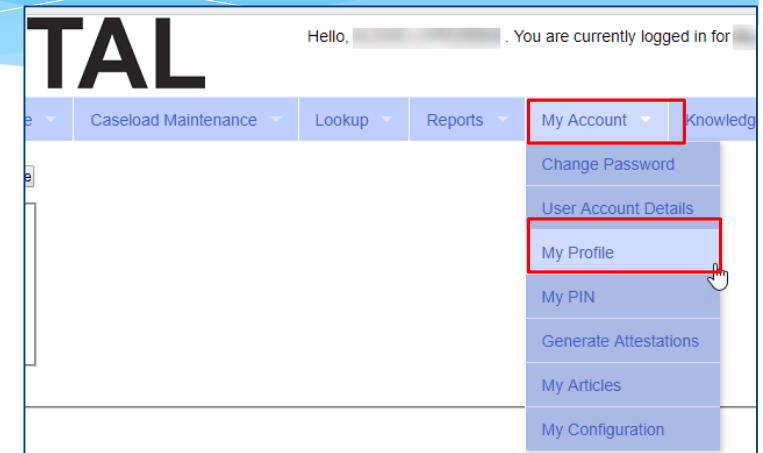
# Changing Your Password

- \* 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' form. The form is titled 'Change Password' and contains three password input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a key icon to its right. At the bottom of the form, there are two buttons: 'Change Password' and 'Cancel'. The CPSE Portal logo is visible at the top left, and a navigation bar with 'Home', 'Activities', 'Attendance', 'Billing', and 'Log' is at the top.

# 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>

A screenshot of the 'My Profile' user information form. The form has three tabs: 'Personal and Professional', 'User Information', and 'Favorites'. The 'User Information' tab is selected. The form contains four input fields: Username, Last Name, First Name, and Email. Below the input fields is an '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**

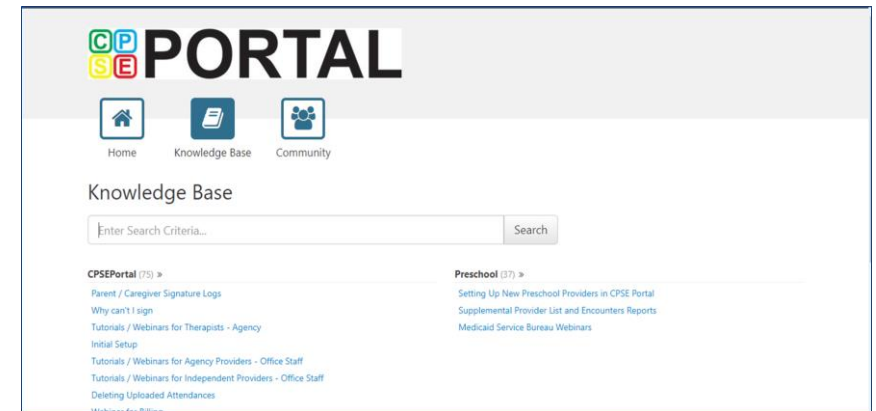
The screenshot shows the CPSE Portal Home Page. The top navigation bar includes links for Home, File Transfer, Activities, eSTACs, Attendance, Billing, Caseload Maintenance, Lookup, Documents, Reports, and Medicaid. Below this, there are sub-links for People, My Account, and Knowledge Base. On the left, there is a User Profile section with fields for Username, First Name, Last Name, and Email, along with an Edit User Account link. On the right, the News Feed section is highlighted, showing a list of articles with dates and 'more' links. The footer includes the copyright notice for James McGuinness & Associates.

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. Below this, there are sub-links for Medicaid, People, My Account, and Knowledge Base. The main content area displays a list of articles with dates and 'more' links. The footer includes the copyright notice for James McGuinness & Associates.

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

# 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/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: 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

\* 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)