JAMES McGUINNESS & ASSOCIATES INC. Consultants

Erie eSTACs Getting Started - Entering Children and STAC-5

Erie County Timeline

* **July 1, 2022:**
  * School districts will enter all 22/23 STAC-5 data into eSTACs. All prior years – send paper STAC-5 to Erie County to enter into their Preschool database.

* **September 1, 2022:**
  * School districts will enter 22/23 STAC-1 services into eSTACs. All prior years – send paper STAC-1 to Erie County to enter into their Preschool database.

* McGuinness will transfer **ALL** students that are currently in Erie County Preschool database to eSTACs.

What is eSTACs

* eSTACs is part of our CPSE Portal website (*https://www.cpseportal.com*).

* It is a series of screens to facilitate the communication of STAC related information from the school district to the County.

* The goal is to eliminate sending paper between from the district to the County (or at least get very close).

eSTACs@CPSEPortal.com

Types of Information

* The following information can be sent to the County via eSTACs
  * Evaluation information (eliminating need for STAC-5)
  * Service information (eliminating need for STAC-1)
  * Supporting documentation including
    * Medicaid Parental Consents
    * Transportation forms
    * IEP
    * Aide / Nurse forms
    * Birth certificate, passport, adoption papers, legal name change document
    * More….

District Designation of Digital Signatories for eSTACs

* Each school district completes a District Designation of Digital Signatories for eSTACs form.

  * This form will designate the CPSE Chair and all staff who will have access to eSTACs, and will be marked as to who can sign & submit STAC-1 & STAC-5's for the school district.

  * McGuinness will enter all staff listed on the form and invite them to the Portal.

  * Once the school district staff accepts the invitation, and sets up their Portal account, then McGuinness will give the staff the necessary permissions to each staff to sign according to what is marked on the form.

* If the school district has a change in staff or needs to add/remove staff signing privileges, a new form should be completed, and sent to McGuinness.

eSTACs@CPSEPortal.com

District Designation of Digital Signatories for eSTACs

District Designation of Digital Signatories for eSTACs

District _____

CPSE Chairperson _____

I authorize of the following individuals to use a digital signature to submit electronic STAC records the eSTACs system on behalf of our district.

Name	eMail	Position / Title	STAC-5	STAC-1
		CPSE Chairperson	☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐

We certify that for any STAC-5 that the above individuals electronically sign and submit through the eSTACs system, the child has received the submitted multidisciplinary evaluation in accordance with Section 4410 of the Education Law and the Regulations of the Commissioner of Education and we maintain proper documentation to support this.

We certify that for any STAC-1 that the above individuals electronically sign and submit through the eSTACs system, the preschool student with a disability is being provided the educational services submitted and that such services have been recommended by the Committee on Preschool Education and that the child is eligible for such placement in accordance with Section 4410 of the Education Law and the Regulations of the Commissioner of Education and we maintain proper documentation to support this.

_____   _____
Name   **Title**

Please fax the completed form to (518) 393-9938 attention eSTACs.

_____   _____
Signature   **Date**

Getting Started

* Each district has a login to the CPSE Portal.

* That single login can "invite" additional users from their district.

* Every individual that logs in for a district should have their own username & password.

* When a person receives an invite, they can then click a link to accept the invitation and create a username and password.

Inviting New Users
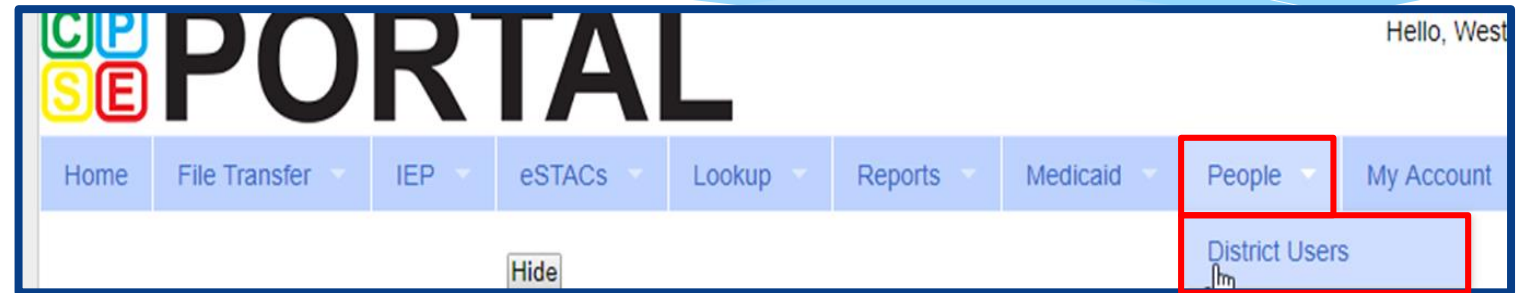
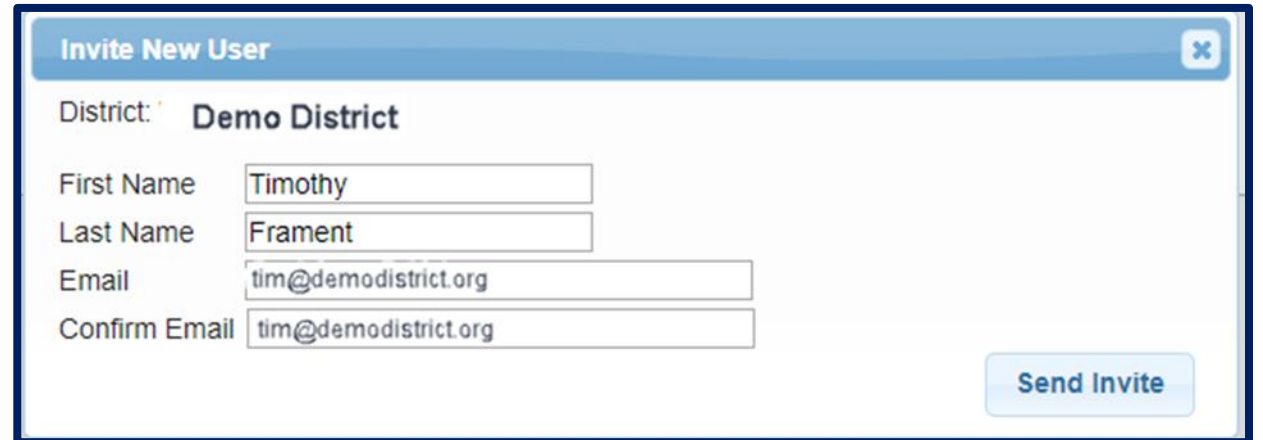* Go to **People -> District Users**

* Click "*Invite New User*".
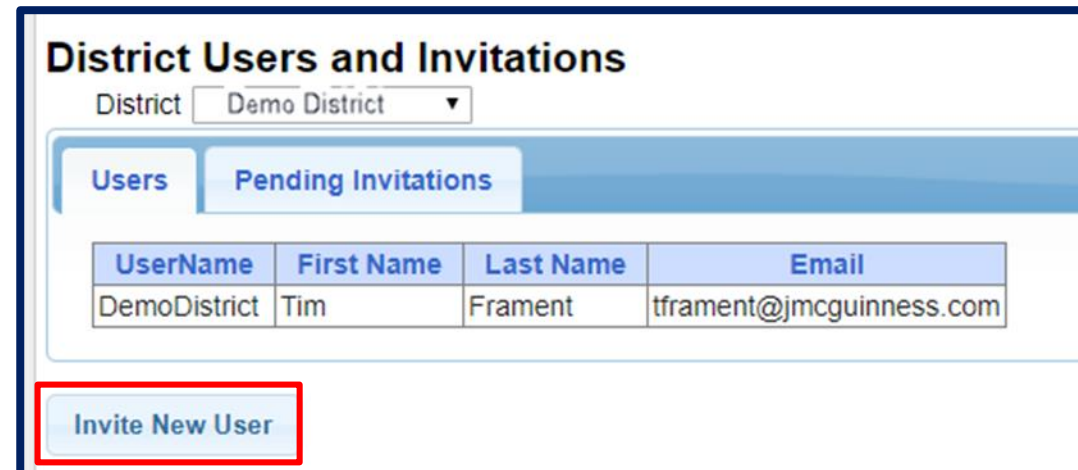
Inviting New Users

* Enter First Name, Last Name & Email address of new user, and click "*Send Invite*".

* CPSE Portal will send an email inviting the new user to join the Portal.

Invite New User

District: **Demo District**

First Name	Timothy
Last Name	Frament
Email	tim@demodistrict.org
Confirm Email	tim@demodistrict.org

Send Invite

Accepting the Invitation

* The new user will receive the below email containing a link to join the Portal.
  * The link will come from **noreply@CPSEPortal.com**.

From: noreply@CPSEPortal.com
Sent: Thursday, January 31, 2019 9:56 PM
Subject: User Invitation

Timothy Frament,

You have been invited to be associated with the district DEMO DISTRICT in the CPSEPortal system. Please follow the link below to confirm this invitation, and associate yourself with this district.

http://localhost/CPSEPortal/People/Invites/DistrictInvitationResponse.ashx?code=db7d8f7ab79a4ddebd037d9c855e36fc

NOTE: This is an automated email and should not be replied to.

Choosing Username and Password

* The confirmation page allows the user to choose a username and password, and "*Accept Invitation*".

* When the individual enters their choice for a username the screen will display whether that name is available or not.

eSTACs@CPSEPortal.com

CPSEPortal Invitation
You have been invited to be associated with ▓▓▓▓▓▓▓▓▓ as a ▓ password and then you may log in to the system. If any of your details

Name Confirmation - Confirm this information is correct
First Name   Last Name
Timothy   **Frament**

User Account Information
Username
[myUserName]   ✓ Available

Password   Confirm Password
[•••• 🔑]   [•••• 🔑]

[Accept Invitation]

User Account Information
Username
[demodistrict]   ⚠ Taken

Password   Confirm Password
[•••• 🔑]   [•••• 🔑]

[Accept Invitation]

Invitation Issues –
User did not receive an email

* Have user check their junk / spam folder.

* Use the Pending Invitations tab under *People -> District Users* to either:

  * Resend link

  * Copy the link and send with your email
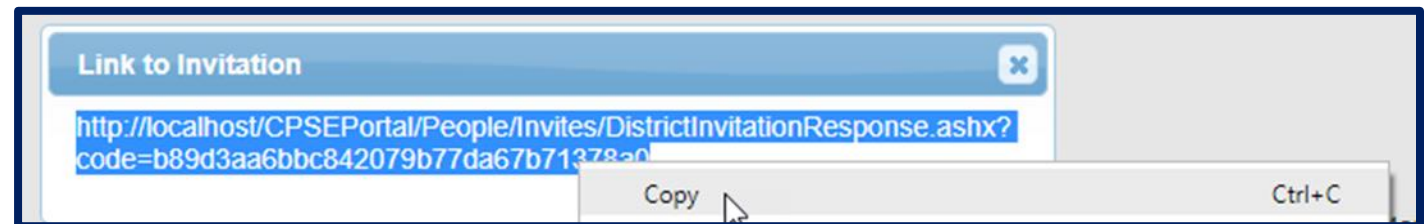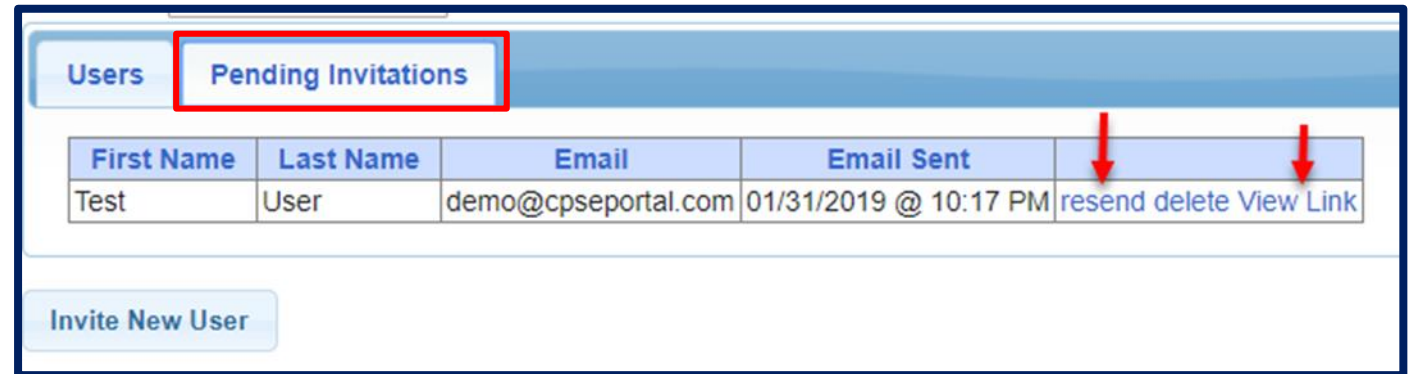
Deleting District Users
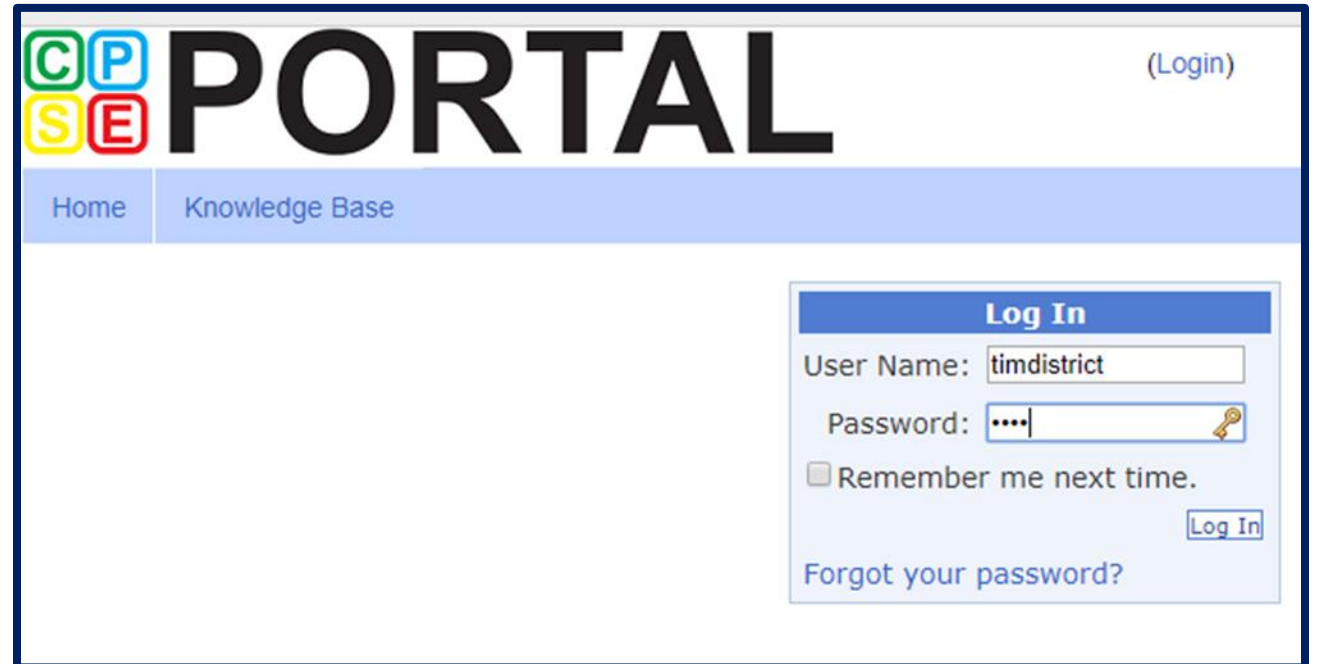
* If a staff member leaves their position the CPSE Chair listed in the Portal can delete them from the Portal.

* Go to *People -> District Users*

* Select the "*Delete*" option next to the staff members name.

Logging In

* Use your browser to navigate to **https://www.cpseportal.com**

* Enter your User Name and password.

Digital Signature – User Profile

* The user's account should have that individuals first and last name associated with the account.

* You can easily see whether your account has the first and last name entered by looking user profile panel on the dashboard when you first log in.

* To add or edit First & Last name, click *My Account -> User Account Details*.

CPSE PORTAL

| Home | File Transfer | IEP | eSTACs | Lookup |

User with First and Last Name

User Profile
Username: **gMcGee**
First Name: **Greta**
Last Name: **McGee**
Email: **tframent@jmcguinness.com**

Edit User Account

User without name [Hide]

User Profile
Username: **DistrictUserName**
First Name:
Last Name:
Email: **districtUser@District.org**
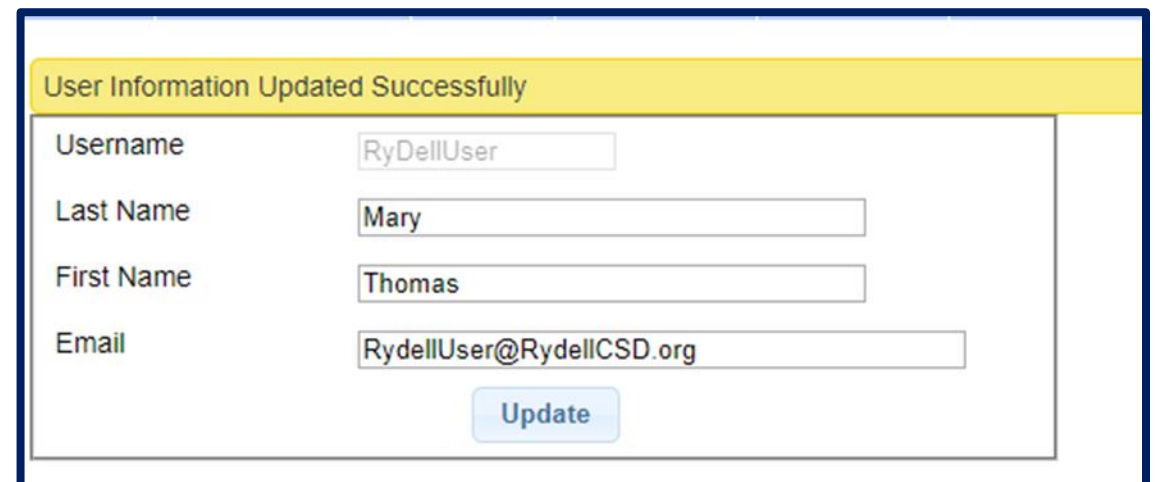
Edit User Account

Digital Signature
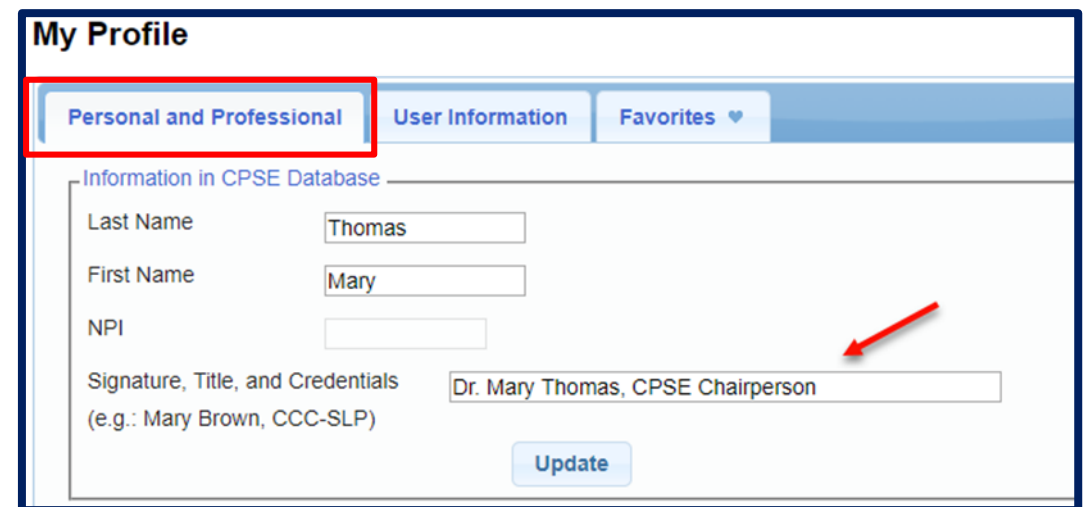
* Go to **My Account -> User Account Details**

* Use the User Account Details page to enter / edit your Last name and First name for your account.

* Click "*Update*" to save the changes
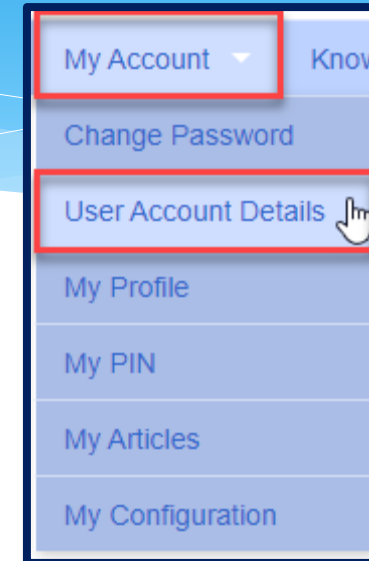
eSTACs@CPSEPortal.com

Digital Signature – Signature & Title

* Go to *My Account -> My Profile*

* On the Personal and Professional tab, ensure that your first and last name are correct.

* Enter your Signature & Title by typing out your "signature" exactly as it would be if you signed your name with a pen. Include any punctuation, titles, etc. that you include when you sign your name for CPSE related documents.

* Click "*Update*" to save your changes.

eSTACs@CPSEPortal.com

Digital Signature – Creating Your Pin

* Go to **My Account -> My PIN**

* To create your PIN:
  * 1 - Choose a PIN and type it in the PIN Number field.
  * 2 - Enter your username that you log in with (should be prefilled).
  * 3 - Enter your password that you use to login to CPSE Portal.
  * 4 - Click "*Save PIN*".

My Account ▼   Know

Change Password

User Account Details

My Profile

My PIN

My Articles

My Configuration
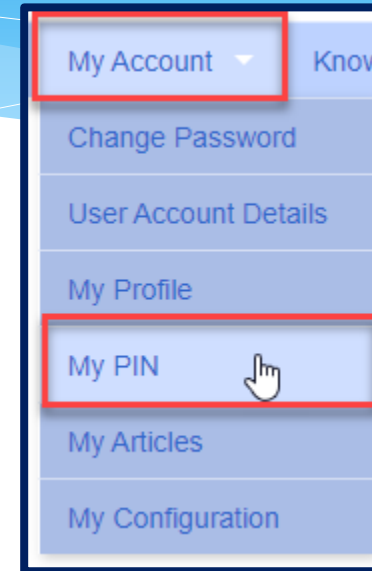
PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign until you do so. Please create one now.

PIN Number: [   ] **1**   [Save PIN] **4**
Username: [DistrictUserName] **2**
Password: [   ] **3**

Digital Signature – Creating PIN Problems

* The message "**No person record exists for your account. PIN cannot be created**." indicates that you did not perform Step #1 – Entering your first and last name for the user account.

PIN Selection

No person record exists for your account. PIN cannot be created.

PIN Number: [   ] **Save PIN**
Username: [   ]
Password: [   ] 🔑

* The message "**Invalid Password. Try Again**" indicates that what you are entering into "Password" field is not the correct password that you use to log into CPSE Portal. Make sure that you are not entering your PIN a second time in the Password field.

PIN Selection

You have already chosen a PIN.
Invalid Password. Try again.

PIN Number: [   ] **Change PIN**
Username: [RyDellUser]
Password: [   ] 🔑
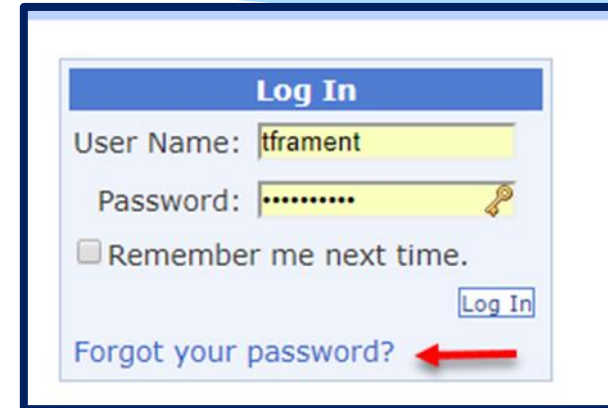
Forgotten Passwords

* User can click "*Forgot your password?*" on login screen.

* Enter your username and click "*Submit*".

* An email with a new password will be sent to your email address.

eSTACs@CPSEPortal.com

Forgotten Usernames

* Any district user (or County user) can use the district users screen to view all the users and see what their username is.

* Go to *People -> District Users*

eSTACs Entering Children

eSTACs Student Search
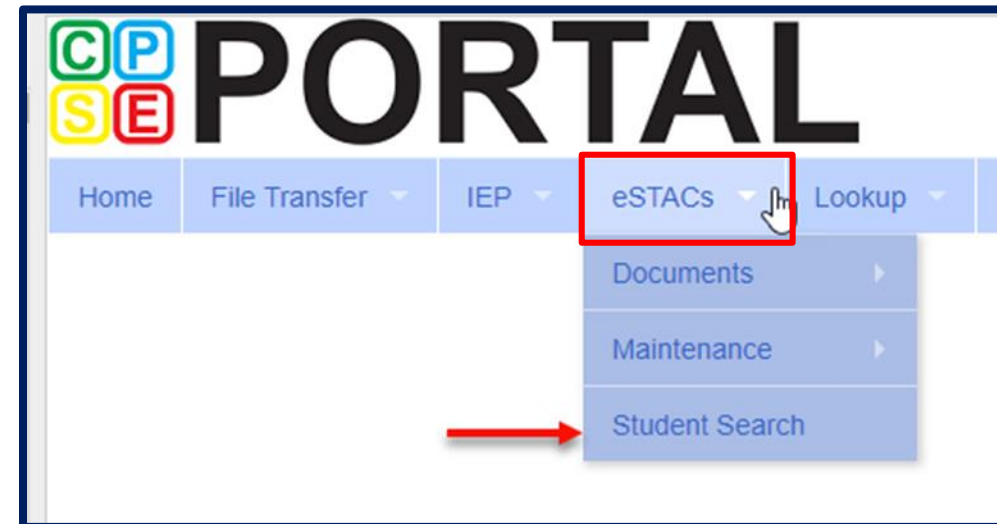
* Go to **eSTACs –> Student Search**

Student Search

* It is good practice to search to make sure the child isn't already in the system.

* The fields above are used as filters to find a specific child. You can search based on any combination of fields.

* Searching with no filters specified will return all children. Click "*Retrieve*".

Student Search – no Filters

Student Search – Partial Name

* For the first and last name you can enter the first few letters and search to find all students that name start with those letters.

Student Search - Wildcard

* Use the percent sign (%) as a wildcard.

Student Search – Multiple Fields

* You can search for both first and last name as well as partial first and last names.

Adding a Student

* Go to the Student Search screen.

* Verify student is not already in system.

* Click on "*Add New Student*" button.

Student Information

* Field with an asterisk (*) next to their label are required in order to save.

* Other fields should be entered if the information is known.

Student Information

Add/Edit Student

County of Student's Current Location*	ROCKLAND
Is this student placed in Foster Care?*	○ Yes ○ No
District*	ABBOT
Legal Last Name*		Suffix
Legal First Name*	
Middle Initial	
DOB*	
Gender*	○ Male ○ Female
Race/Ethnicity*	
CIN	
SEDSTACID	
Address	
City	
State	
Zip	

Transfer Student Information

From County

From District

Save   Cancel

Saving Incomplete Entry

* Clicking "*Save*" without all mandatory fields entered will result in labels indicating the missing data.

Student Information

Add/Edit Student

County of Student's Current Location* [ROCKLAND ▾]

Is this student placed in Foster Care?* ○ Yes ○ No *Required

District* [ABBOT ▾]

Legal Last Name* [   ] *Required Suffix [   ]

Legal First Name* [   ] *Required

Middle Initial [   ]

DOB* [   ] *Required

Gender* ○ Male ○ Female *Required

Race/Ethnicity* [▾] *Required

CIN [   ]

SEDSTACID [   ]

Address [   ]

City [   ]

State [   ]

Zip [   ]

Transfer Student Information

From County [▾]   From District [▾]

[Save] [Cancel]

Student Details

* Upon saving a new student, the system will take you to the student details page.

Student Details

* Top section shows child demographic information.
* Lower section has tabs for:
  * STAC-5s (one row per STAC-5)
  * Evaluation Components (one row per evaluation component)
  * IEP Placements (one row per STAC-1)
  * IEP Mandates (one row per mandated service on IEP)
  * Documents (uploaded documents for student)
  * Forms

Editing Existing Student

* Search for student

* Click "*Edit*" to edit student demographics (name, address, etc.)

* Click "*Details*" to get to student details page with evaluations, services, documents, etc.

Filters

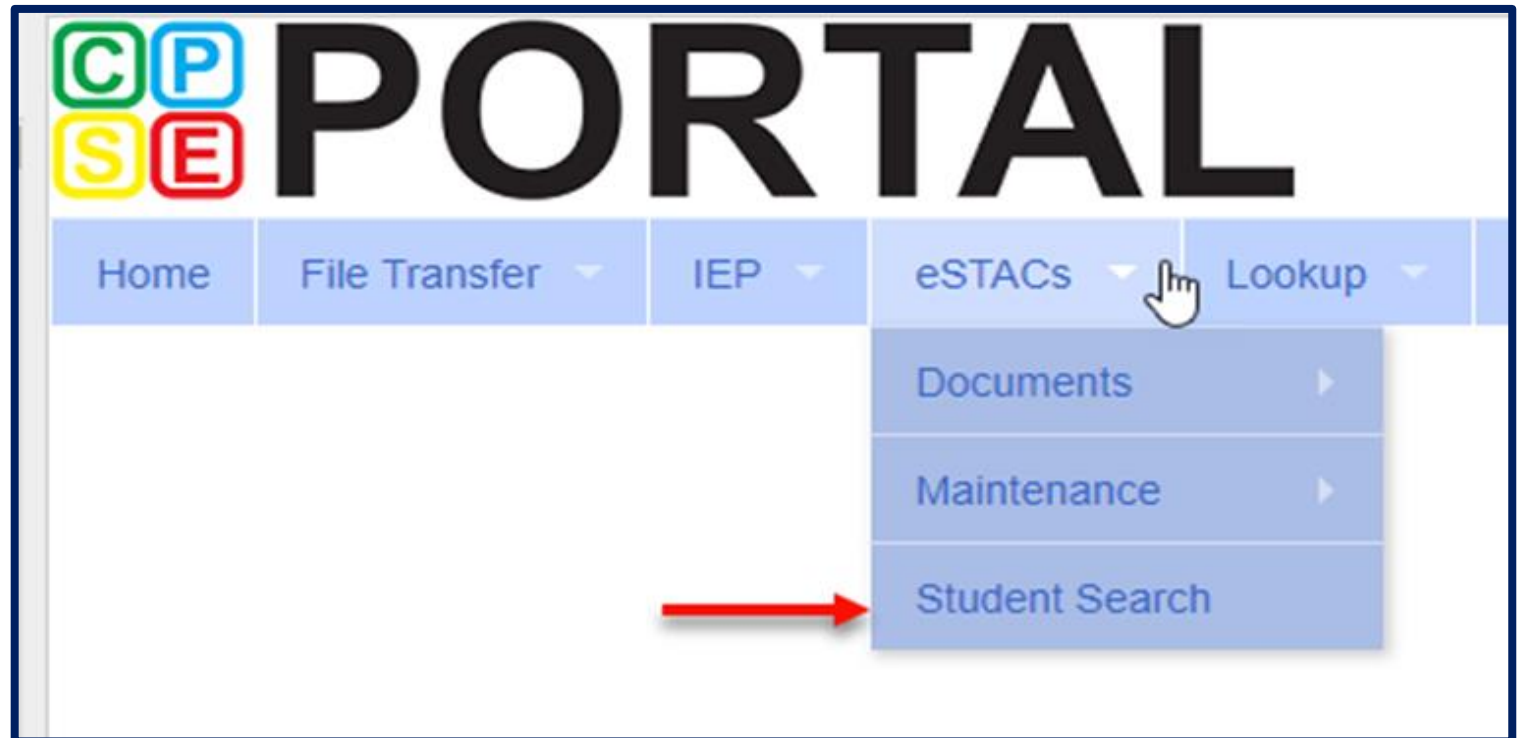| Last Name	First Name	DOB

District ▼

County

Add New Student

Last Name	First Name	DOB	Gender	CIN	STACID		
Balmudo	Leo	03/19/16	M			Edit	Details
Carrington	Michael	04/04/16	M			Edit	Details
Chisum	Tom	12/31/16	M			Edit	Details
Del Fuego	Peter	05/15/15	M			Edit	Details
DelFuego	Anthony	03/12/16	M			Edit	Details
DeltoroFuego	Maria	09/12/16	F			Edit	Details
DiGregorio	Charlene	02/22/16	F			Edit	Details
DiMucci	Louis	12/15/16	M			Edit	Details

eSTACs Entering STAC-5

eSTACs Student Search

* Go to **eSTACs -> Student Search**

Student Search for Student Details

* Always search for the student first.

* If student is already in system, click the "*Details*" link for that student.

* If student does not exist, click "*Add New Student*".

eSTACs@CPSEPortal.com

Filters

| Last Name | First Name | DOB | STACID | CIN |

District

County

Retrieve

Add New Student

Last Name	First Name	DOB	Gender	CIN	STACID		
Balmudo	Leo	03/19/16	M			Edit	Details
Carrington	Michael	04/04/16	M			Edit	Details
Chisum	Tom	12/31/16	M			Edit	Details
DelFuego	Anthony	03/12/16	M			Edit	Details
DiGregorio	Charlene	02/22/16	F			Edit	Details
DiMucci	Louis	12/15/16	M			Edit	Details
Facciano	Franchesca	09/09/16	F			Edit	Details
Jaworski	David	05/18/16	M			Edit	Details
LaTierri	Sonny	08/13/16	M			Edit	Details
Maraschino	Marty	07/22/16	F			Edit	Details
McKenzie	Bradley	12/05/16	M			Edit	Details
Misner	Martin	11/11/16	M			Edit	Details
Murdoch	Kenickie	10/10/16	M			Edit	Details
Nogerelli	John	06/14/16	M			Edit	Details
Rebchuck	Paulette	08/22/16	F			Edit	Details
Rizzo	Betty	09/09/16	F			Edit	Details
Willard	Willie	05/11/16	M			Edit	Details
Zinone	Stephanie	01/21/16	F			Edit	Details

Adding a New Evaluation

* Select the **"STAC-5s"** tab.
* Click the *"Add New Evaluation"* button.

eSTACs vs Paper STAC-5

Complete Fields Related to Evaluation

* Enter information regarding evaluation.

* All fields labeled with an asterisk (*) must be filled in to save.

Evaluations on Student Details

* There are two tabs for Evaluations:
* **STAC-5s Tab** - shows one line per STAC-5 group of components.

STAC-5s	Evaluation Components	IEP Placements	IEP Mandates	Documents	Forms				
County	**Description**		**Status**	**Submitted By**	**Submitted Date**				
WESTCHESTER	FRED S KELLER SCHOOL Jul 2020 (PSY, SOC, SPT)		Not Submitted			Edit	Delete	Print	Sign and Submit

Add New Evaluation

Evaluations on Student Details

* The second tab for Evaluations is the Evaluation Components.
* **Evaluation Components Tab** - shows one line per component.
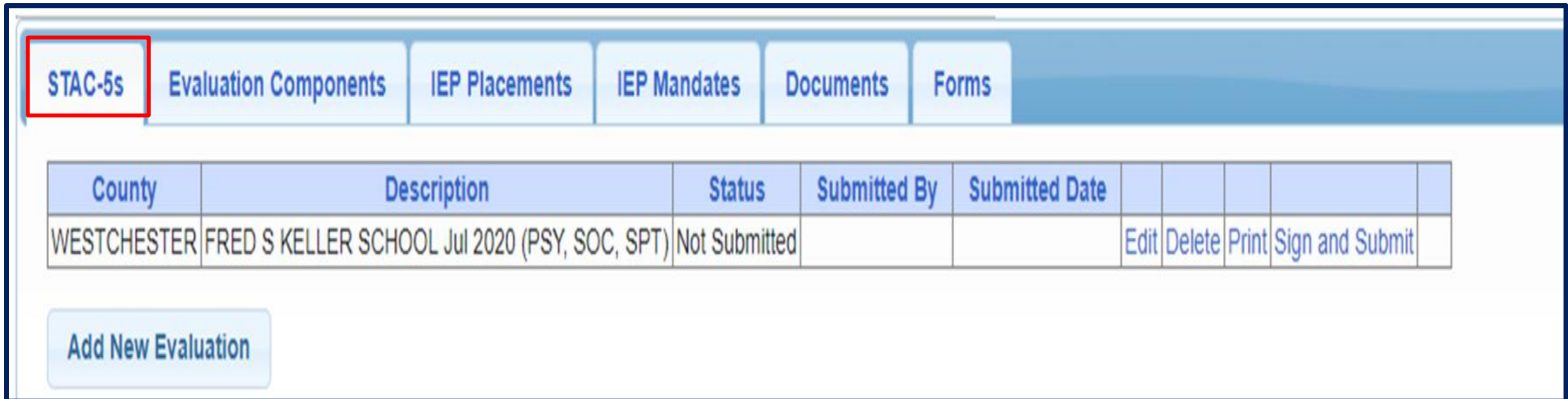
County	Provider	Component	Eval Date	Bilingual	Status	Submitted By	Submitted Date		
WESTCHESTER	FRED S KELLER SCHOOL	Psychological	07/14/2020	No	Not Submitted			Edit	Delete
WESTCHESTER	FRED S KELLER SCHOOL	Social	07/14/2020	No	Not Submitted			Edit	Delete
WESTCHESTER	FRED S KELLER SCHOOL	Speech/Language	07/23/2020	No	Not Submitted			Edit	Delete

Tabs: STAC-5s | **Evaluation Components** | IEP Placements | IEP Mandates | Documents | Forms

Add New STAC-5

eSTACs Uploading Documents

Documents Required for Evaluations

* Erie County is requiring the following documents to be uploaded, before you can sign and submit your STAC-5:

  * **The IEP Summary page or complete IEP**

  * **An Evaluation Justification Letter – only** needed if 2 evaluations need to be completed within the same school year for the same type of evaluation.

Uploading a Document

* Select Documents tab on Student Details screen.

* This will also show any Missing Documents that need to be uploaded.

* Click "*Upload*" button at bottom of screen or "Upload" at the end of the missing document line.

eSTACs@CPSEPortal.com

Uploading a Document

* Click "*Choose File*" button.
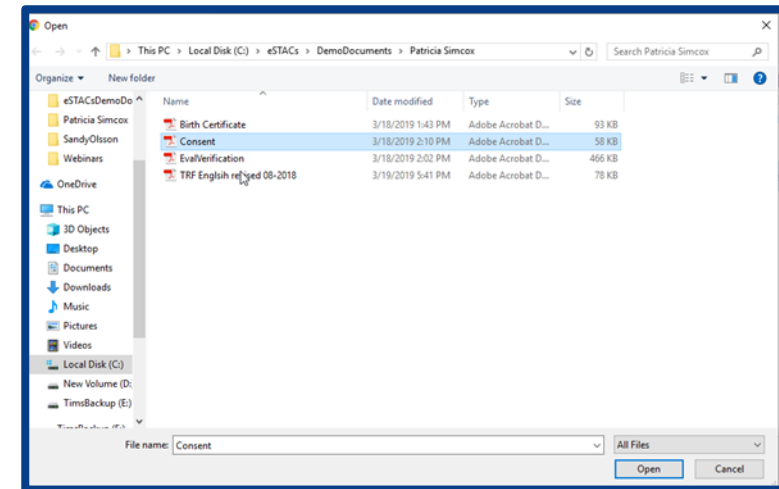
* Browse to the file location and select the file.

* Click the "*Open*" button on the file dialog

* The filename will appear next to "*Choose File*" button.

* Click "*Upload*".

Indicate Document Type

* Right hand side shows the document.

* Left hand side shows fields to specify what type of document it is, as well as other related fields specific to the type of document.

Sign and Submit Evaluation

* Once all documents have been uploaded for the evaluation, you can now "*Sign and Submit*" the STAC-5.
* The Status, Submitted By & Submitted Date columns will now show a status of submitted, who submitted the STAC-5, and the date submitted.
* This will now be sent to the county for review.

STAC-5s	Evaluation Components	IEP Placements	IEP Mandates	Documents	Forms

County	Description	Status	Submitted By	Submitted Date				
J	IC Nov 2021 (PHT)	Not Submitted			Edit	Delete	Print	Sign and Submit

Add New Evaluation

Submitting Evaluations – Error Messages

* If all of your documents are not uploaded, you will not be able to sign and submit.

* Your error will tell you what documents need to be uploaded.

* You can also see the missing documents on the documents tab, under Missing Documents

Submitting Evaluations – Error Messages

1. You did not create your first and last name.

2. You did not create a PIN for your Portal account.

3. You did not create your signature and title.

4. Your district's authorization paperwork was not sent to McGuinness or you are not listed on the paperwork to sign and submit evaluations.

1	⚠ You do not have a person record assiociated with this account. Please fill in your firs
2	⚠ You have not yet created your PIN. Please create your PIN now.
3	Please enter your signature title and credentials on the "My Profile" page.
4	You are not authorized by the county to sign evaluations.

Submitting Evaluations – Unsubmitted Evaluation List

* Go to *eSTACs -> Submit -> Submit Evaluations*
* This grid displays unsubmitted evaluations based on selected filters.
* Rows where Status = "OK To Submit" will have a checkbox.
* Rows where Status = "Problems Found" will not have a checkbox.
* Mark the checkbox on the rows that you wish to submit to the County or click "*Select All*".
* Click "*Submit*" to submit the marked evaluations to the County.
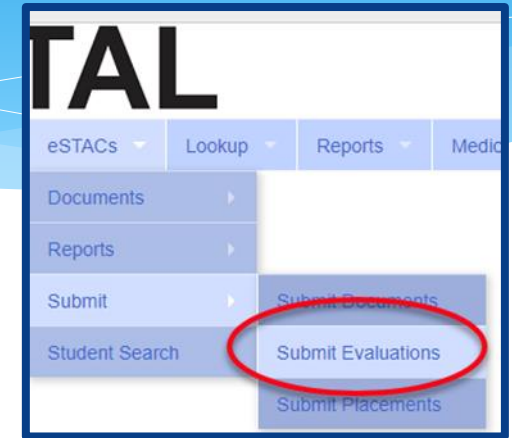
Evaluations To Submit

Select All | Submit

Select	Last Name	First Name	School Year	Evaluator	Components	Status
☐		DIONNE	201819	ALL ABOUT KIDS	ALL ABOUT KIDS Mar 2019 (PSY, SOC, SPT)	OK to Submit
☐		HARRIS	201819		ITER Feb 2019 - Mar 2019 (OCT, PHT, PSY, SOC, SPT)	OK to Submit
☐		CLEO	201819		BEYOND Feb 2019 - Mar 2019 (PSY, SOC, SPT)	OK to Submit
		CASSIDY	201819		019 - Feb 2019 (PSY, SOC, SPT)	Problems Found
		CATHLEEN	201819		019 (PSY, SOC, SPT)	Problems Found
		OLLIE	201819		019 - Apr 2019 (EDU, PSY, SOC)	Problems Found
		NED	201819		T, PSY, SOC, SPT)	Problems Found
		ADAN	201819	BILINGUALS INC. DBA ACHIEVE BEYOND	BEYOND Jan 2019 - Feb 2019 (PSY, SOC, SPT)	Problems Found

Closing

Erie County Timeline

* **July 1, 2022:**
  * School districts will enter all 22/23 STAC-5 data into eSTACs. All prior years – send paper STAC-5 to Erie County to enter into their Preschool database.

* **September 1, 2022:**
  * School districts will enter all 22/23 STAC-1 services into eSTACs. All prior years – send paper STAC-1 to Erie County to enter into their Preschool database.

* McGuinness will transfer **ALL** students that are currently in Erie County Preschool database to eSTACs.

Upcoming Webinars

eSTACs Getting Started / Entering Children and STAC-5:

- Tuesday, June 7th @ 10:00AM

    https://attendee.gotowebinar.com/register/4095359079367445007

- Thursday, June 9th @ 10:00AM

    https://attendee.gotowebinar.com/register/6956320220677873166

- Monday, June 13th @ 2:00PM

    https://attendee.gotowebinar.com/register/4009962210261453071

- Thursday, June 16th @ 1:30PM

    https://attendee.gotowebinar.com/register/8587562268716213517

eSTACs@CPSEPortal.com

Upcoming Webinars

eSTACs Entering STAC-1 Center Based & Center Based Related Services:
- Tuesday, July 12th @ 10:00AM
  https://attendee.gotowebinar.com/register/8584417665478512909
- Tuesday, July 19th @ 10:00AM
  https://attendee.gotowebinar.com/register/3179885906889969935
- Wednesday, July 20th @ 2:00PM
  https://attendee.gotowebinar.com/register/1138429264668073228
- Tuesday, September 7th @ 2:00PM – *Refresher*
  https://attendee.gotowebinar.com/register/5429665917715199504

eSTACs@CPSEPortal.com

Upcoming Webinars

eSTACs Entering STAC-1 SEIT and Related Services:

- Tuesday, July 26th @ 10:00AM

    https://attendee.gotowebinar.com/register/8161132077064528912

- Tuesday, August 2nd @ 10:00AM

    https://attendee.gotowebinar.com/register/4635198397903171854

- Thursday, August 4th @ 2:00PM

    https://attendee.gotowebinar.com/register/26849397266125836

- Thursday, September 8th @ 10:00AM – *Refresher*

    https://attendee.gotowebinar.com/register/7889253637841194765

Upcoming Webinars

eSTACs Amending versus Rescinding:

- Tuesday, September 20th @ 10:00AM

  https://attendee.gotowebinar.com/register/4180764744585408784

- Wednesday, September 21st @ 2:00PM

  https://attendee.gotowebinar.com/register/4525007541590938896

eSTACs@CPSEPortal.com

Getting Support

* If you need help you can contact Kelly Knowles at Kknowles@jmcguinness.com

* After you are familiar with the Portal, and you need help, send an email to **eSTACs@CPSEPortal.com**.

* Please include your district name, which County you work with and a description of your issue.

* If you would like to speak on the phone, please state so in your email along with your phone number and best times to reach you.

eSTACs@CPSEPortal.com