

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).

# 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.

# 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	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

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

\_\_\_\_\_  
Signature

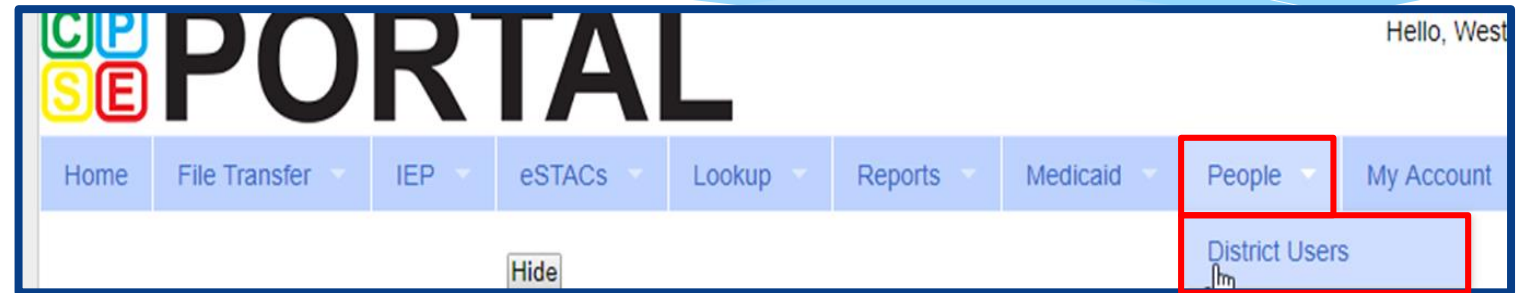
\_\_\_\_\_  
Date

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

# Getting Started

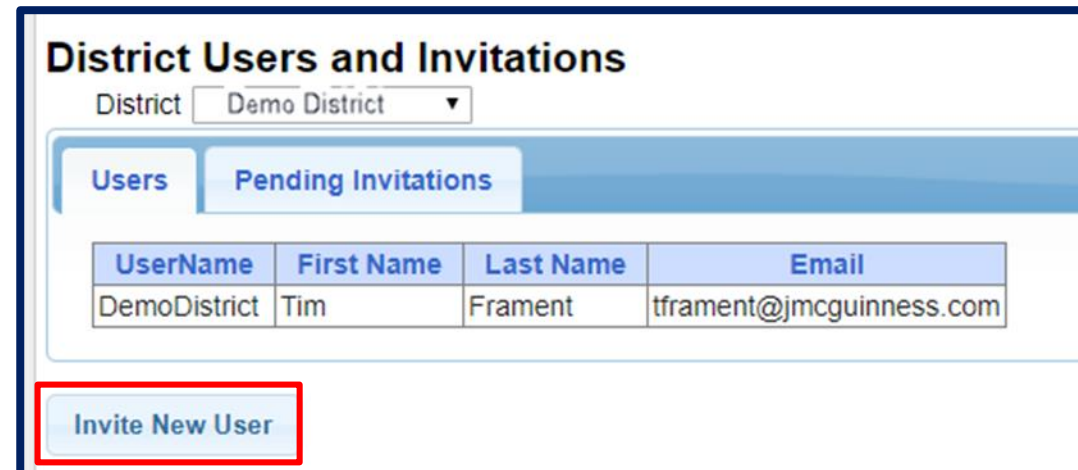
- \* Each district has a login to the CPSE Portal.
- \* That single login can “invite” additional users from their district.
- \* Every individual that logs in for a district should have their own username & password.
- \* When a person receives an invite, they can then click a link to accept the invitation and create a username and password.

# Inviting New Users



\* Go to *People -> District Users*

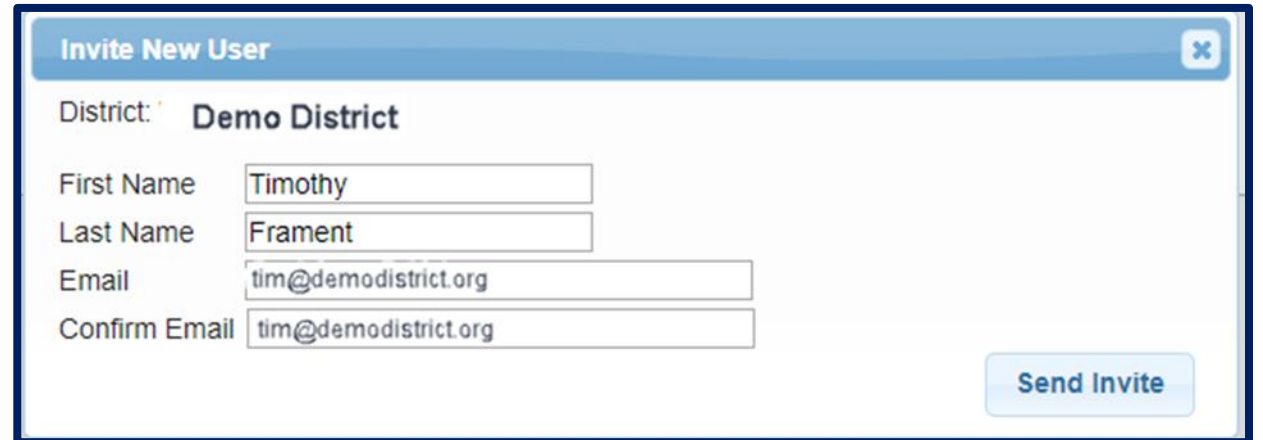
\* Click “*Invite New User*”.





# 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.



The screenshot shows a web form titled "Invite New User" with a close button (X) in the top right corner. The form contains the following fields and values:

Field	Value
District	Demo District
First Name	Timothy
Last Name	Frament
Email	tim@demodistrict.org
Confirm Email	tim@demodistrict.org

A "Send Invite" button is located at the bottom right of the form.

# 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.

**CPSEPortal Invitation**

You have been invited to be associated with V [redacted] as a [redacted] 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  
 Available

Password  Confirm Password

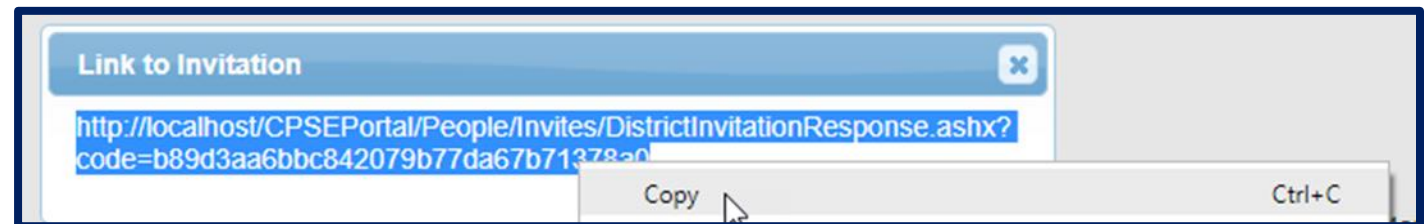
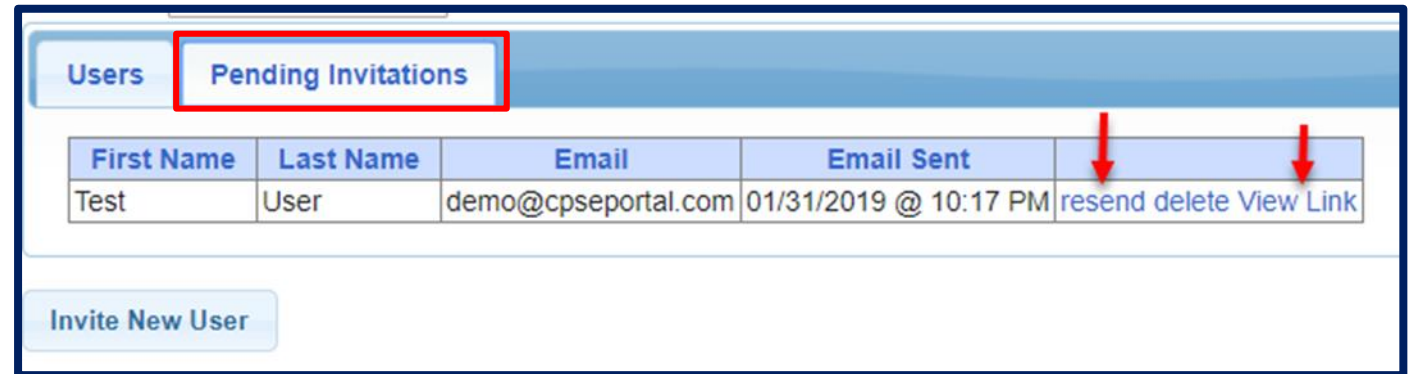
**User Account Information**

Username  
 Taken

Password  Confirm Password

# 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

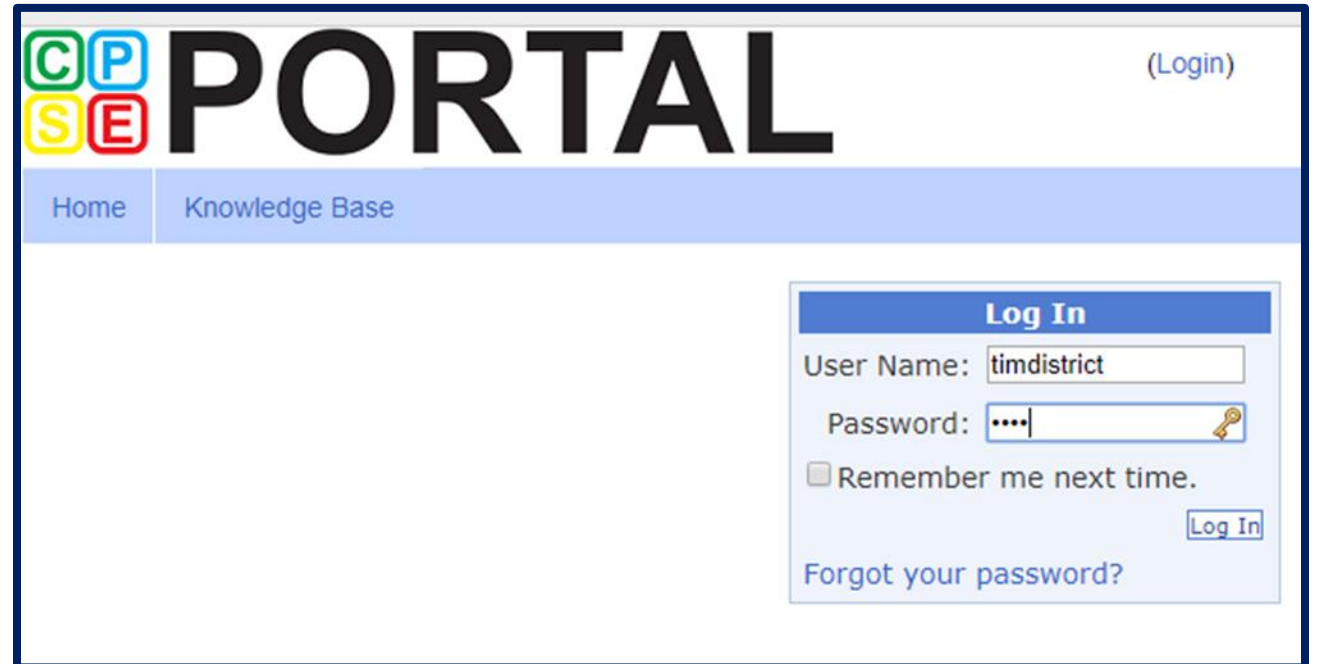
- \* If a staff member leaves their position the CPSE Chair listed in the Portal can delete them from the Portal.
- \* Go to **People -> District Users**
- \* Select the “Delete” option next to the staff members name.

The screenshot shows a web application interface for managing district users. At the top is a navigation bar with links: Home, File Transfer, IEP, eSTACs, Lookup, Documents, Reports, Medicaid, People, My Account, and Knowledge Base. The 'People' link is highlighted with a red box. Below it, a dropdown menu is open, showing 'District Users' as the selected option, also highlighted with a red box and a mouse cursor. The main content area is titled 'District Users and Invitations' and includes a 'District' dropdown menu. Below this are two tabs: 'Users' (selected) and 'Pending Invitations'. The 'Users' tab displays a table with columns: UserName, First Name, Last Name, Email, and two empty columns. The table contains three rows of data. The 'Delete' button in the second row is highlighted with a red box. At the bottom left, there is a button labeled 'Invite New User'.

UserName	First Name	Last Name	Email		
				Delete	
				Delete	

# Logging In

- \* Use your browser to navigate to <https://www.cpseportal.com>
- \* Enter your User Name and password.




The screenshot shows the CPSE Portal login interface. At the top, the logo consists of four colored squares (C in green, P in blue, S in yellow, E in red) followed by the word "PORTAL" in large black letters. A "(Login)" link is in the top right. Below the logo is a navigation bar with "Home" and "Knowledge Base" links. The main content area features a "Log In" box on the right. This box contains a "User Name:" field with the text "timdistrict", a "Password:" field with masked characters "...." and a key icon, a "Remember me next time." checkbox, and a "Log In" button. Below the login box is a link for "Forgot your password?".

CPSE PORTAL (Login)

Home Knowledge Base

**Log In**

User Name:

Password:  

☐ Remember me next time.

[Forgot your 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: tfragment@jmcguinness.com

[Edit User Account](#)

This screenshot shows the user profile of a user named Greta McGee. The first and last names are clearly displayed, and red arrows point to them from the text in the adjacent list item.



**User without name** [Hide](#)

User Profile

Username: DistrictUserName

First Name:

Last Name:

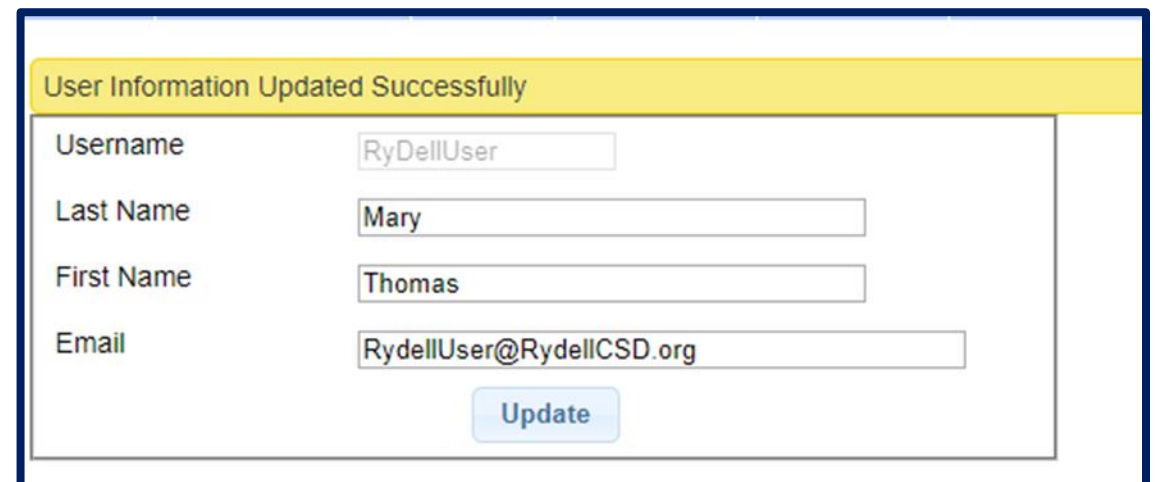
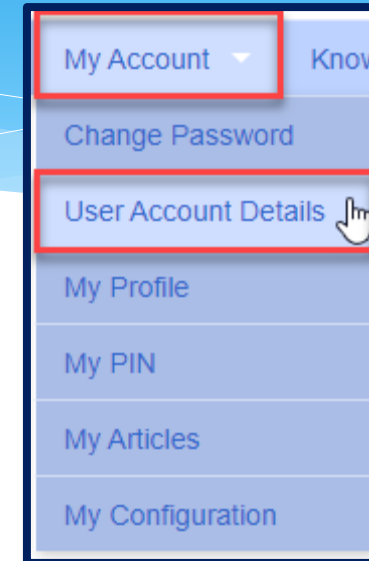
Email: districtUser@District.org

[Edit User Account](#)

This screenshot shows the user profile of a user named DistrictUserName. The first and last name fields are empty, and red arrows point to them from the text in the adjacent list item.

# Digital Signature

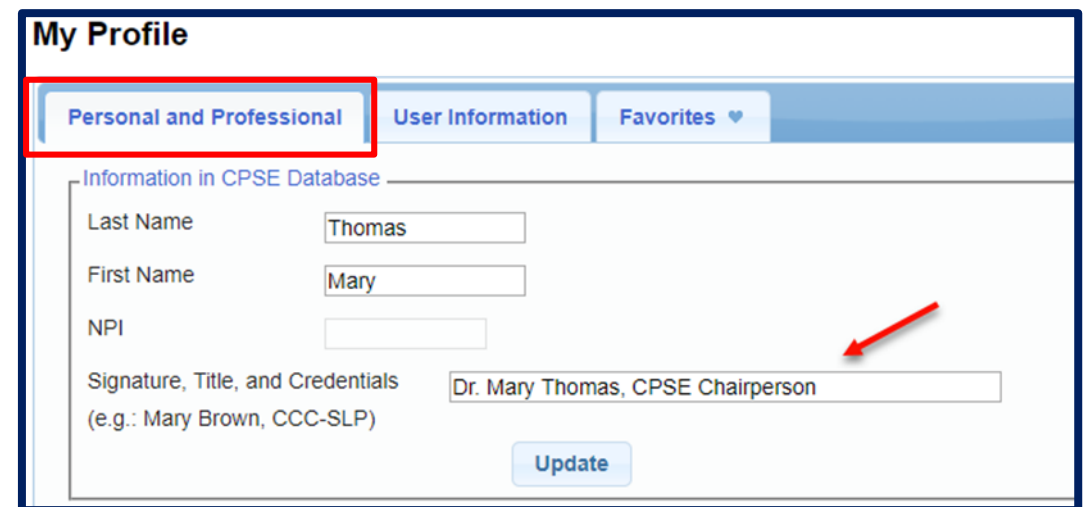
- \* Go to **My Account** -> **User Account Details**
- \* Use the User Account Details page to enter / edit your Last name and First name for your account.
- \* Click “**Update**” to save the changes

A screenshot of a web application's 'User Information Updated Successfully' page. The page has a yellow header bar with the text 'User Information Updated Successfully'. Below the header is a form with four input fields: 'Username' (containing 'RyDellUser'), 'Last Name' (containing 'Mary'), 'First Name' (containing 'Thomas'), and 'Email' (containing 'RydellUser@RydellCSD.org'). At the bottom of the form is a blue 'Update' button.



# 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.

A screenshot of the 'My Profile' page. The 'Personal and Professional' tab is selected and highlighted with a red box. The page shows a form for updating user information. The 'Information in CPSE Database' section includes fields for 'Last Name' (Thomas), 'First Name' (Mary), 'NPI' (empty), and 'Signature, Title, and Credentials' (Dr. Mary Thomas, CPSE Chairperson). A red arrow points to the 'Update' button at the bottom right.

**My Profile**

**Personal and Professional** | User Information | Favorites ♥

Information in CPSE Database

Last Name: Thomas

First Name: Mary

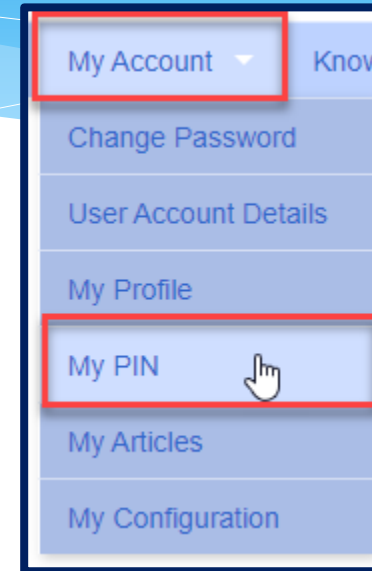
NPI:

Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP): Dr. Mary Thomas, CPSE Chairperson

**Update**

# 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*”.



**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**

Username:  **2**

Password:  **3**

**4**

# 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.
- \* 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**

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

PIN Number:

Username:

Password:  


[Save PIN](#)

**PIN Selection**

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

PIN Number:

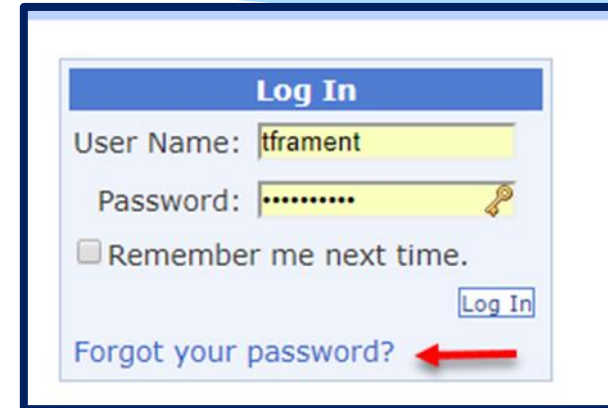
Username:

Password:  

[Change PIN](#)

# 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.



The screenshot shows a 'Log In' form with a blue header. It contains fields for 'User Name' (with the text 'tfragment') and 'Password' (with masked characters and a key icon). Below these is a checkbox for 'Remember me next time.' and a 'Log In' button. At the bottom, there is a link 'Forgot your password?' with a red arrow pointing to it.



The screenshot shows a 'Password Recovery' form with a blue header. It contains a text input field for 'User Name' and a 'Submit' button. The header text reads 'Forgot Your Password?' and the instruction below it says 'Enter your User Name to receive your password.'

# 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**



The screenshot shows a web application interface with two tabs: 'Users' and 'Pending Invitations'. The 'Users' tab is active. Below the tabs is a table with three columns: 'UserName', 'First Name', and 'Last Name'. The 'UserName' column is highlighted with a red box. The table contains two rows of data. Below the table is a button labeled 'Invite New User'.

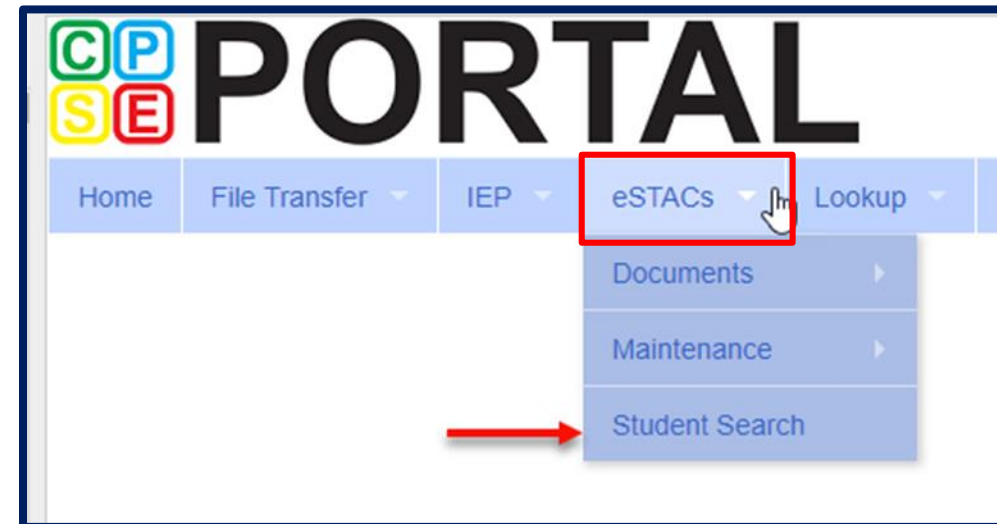
UserName	First Name	Last Name
DemoDistrict	Tim	Frament
timdistrict	Timothy	Frament

Invite New User

# eSTACs Entering Children

# eSTACs Student Search

\* Go to eSTACs → *Student Search*



# Student Search



The screenshot shows a 'Filters' section with the following fields:

- Last Name
- First Name
- DOB
- STACID
- CIN
- Student Number
- County: ROCKLAND (dropdown menu)
- District: CLARKSTOWN CSD (dropdown menu)

At the bottom right of the filter section are two buttons: 'Clear Filters' and 'Retrieve'. The 'Retrieve' button is highlighted with a red rectangular border.

- \* 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

## Filters

Last Name	First Name	DOB	STACID	CIN	Student Number
County					
District					

[Clear Filters](#)[Retrieve](#)[Add New Student](#)

Last Name	First Name	DOB	Gender	CIN	STACID	Student Number			
Balmudo	Leo	03/19/16	M			6600019969	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Carrington	Michael	04/04/16	M			6600019981	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Chisum	Tom	12/31/16	M			6600019967	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
DelFuego	Anthony	03/12/16	M			6600019973	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
DiGregorio	Charlene	02/22/16	F			6600019968	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
DiMucci	Louis	12/15/16	M			6600019980	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Facciano	Francesca	09/09/16	F			6600019971	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Jaworski	David	05/18/16	M			6600019972	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
LaTierri	Sonny	08/13/16	M			6600019965	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Maraschino	Marty	07/22/16	F			6600019966	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
McKenzie	Bradley	12/05/16	M			6600019974	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Misner	Martin	11/11/16	M			6600019978	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Murdoch	Kenickie	10/10/16	M			6600019970	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Nogerelli	John	06/14/16	M			6600019975	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Rebchuck	Paulette	08/22/16	F			6600019977	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Rizzo	Betty	09/09/16	F			6600019964	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Willard	Willie	05/11/16	M			6600019979	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>
Zinone	Stephanie	01/21/16	F			6600019976	<a href="#">Edit</a>	<a href="#">Details</a>	<a href="#">Delete</a>

# 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.

Filters

Di

First Name

DOB

STACID

CIN

District

EVANS

County

Retrieve

Add New Student

Last Name	First Name	DOB	Gender	CIN	STACID		
DiGregorio	Charlene	02/22/16	F			Edit	Details
DiMucci	Louis	12/15/16	M			Edit	Details

# Student Search - Wildcard

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

Filters

De%fuego First Name DOB STACID CIN

District

County

Retrieve

Add New Student

Last Name	First Name	DOB	Gender	CIN	STACID		
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

# Student Search – Multiple Fields

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

Filters

District

County

[Retrieve](#)

[Add New Student](#)

Last Name	First Name	DOB	Gender	CIN	STACID		
Rizzo	Frank	12/18/16	M			<a href="#">Edit</a>	<a href="#">Details</a>

# Adding a Student

- \* Go to the Student Search screen.
- \* Verify student is not already in system.
- \* Click on “Add New Student” button.

The screenshot shows a web interface for searching students. At the top, there is a 'Filters' section with several input fields: 'Last Name', 'First Name', 'DOB', 'STACID', 'CIN', and 'Student Number'. Below these are two dropdown menus: 'County' set to 'ROCKLAND' and 'District' set to 'ABBOT'. To the right of these fields are two buttons: 'Clear Filters' and 'Retrieve'. At the bottom left of the interface is a button labeled 'Add New Student', which is pointed to by a red arrow. The entire interface is enclosed in a dark blue border.

# 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*	<input type="text" value="ROCKLAND"/>	
Is this student placed in Foster Care?*	<input type="radio"/> Yes <input type="radio"/> No	*Required
District*	<input type="text" value="ABBOT"/>	
Legal Last Name*	<input type="text"/>	*Required Suffix <input type="text"/>
Legal First Name*	<input type="text"/>	*Required
Middle Initial	<input type="text"/>	
DOB*	<input type="text"/>	*Required
Gender*	<input type="radio"/> Male <input type="radio"/> Female	*Required
Race/Ethnicity*	<input type="text"/>	*Required
CIN	<input type="text"/>	
SEDSTACID	<input type="text"/>	
Address	<input type="text"/>	
City	<input type="text"/>	
State	<input type="text"/>	
Zip	<input type="text"/>	

[Transfer Student Information](#)

From County	From District
<input type="text"/>	<input type="text"/>

Save

Cancel

# Student Details

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

**CPSE: 420901060000 BALDWINSVILLE CSD**

**Student Information**

Last Name:  First Name:  DOB: **7/12/2018** Eligibility: **7/1/2021 - 8/31/2023**

STACID:  CIN:  Student Number: **4200049933** [Edit](#) [Resync](#)

STAC-5s

Evaluation Components

IEP Placements

IEP Mandates

Documents

Forms

eSTACs Evaluation Number	County	Description	Status	Submitted By	Submitted Date						
No STAC-5s											

Add New Evaluation



# 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

**CPSE: 420901060000 BALDWINVILLE CSD**

**Student Information**

Last Name:  First Name:  DOB: **7/12/2018** Eligibility: **7/1/2021 - 8/31/2023**

STACID:  CIN:  Student Number: **4200049933** [Edit](#) [Resync](#)

STAC-5s

Evaluation Components

IEP Placements

IEP Mandates

Documents

Forms

eSTACs Evaluation Number	County	Description	Status	Submitted By	Submitted Date						
No STAC-5s											

Add New Evaluation

# 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

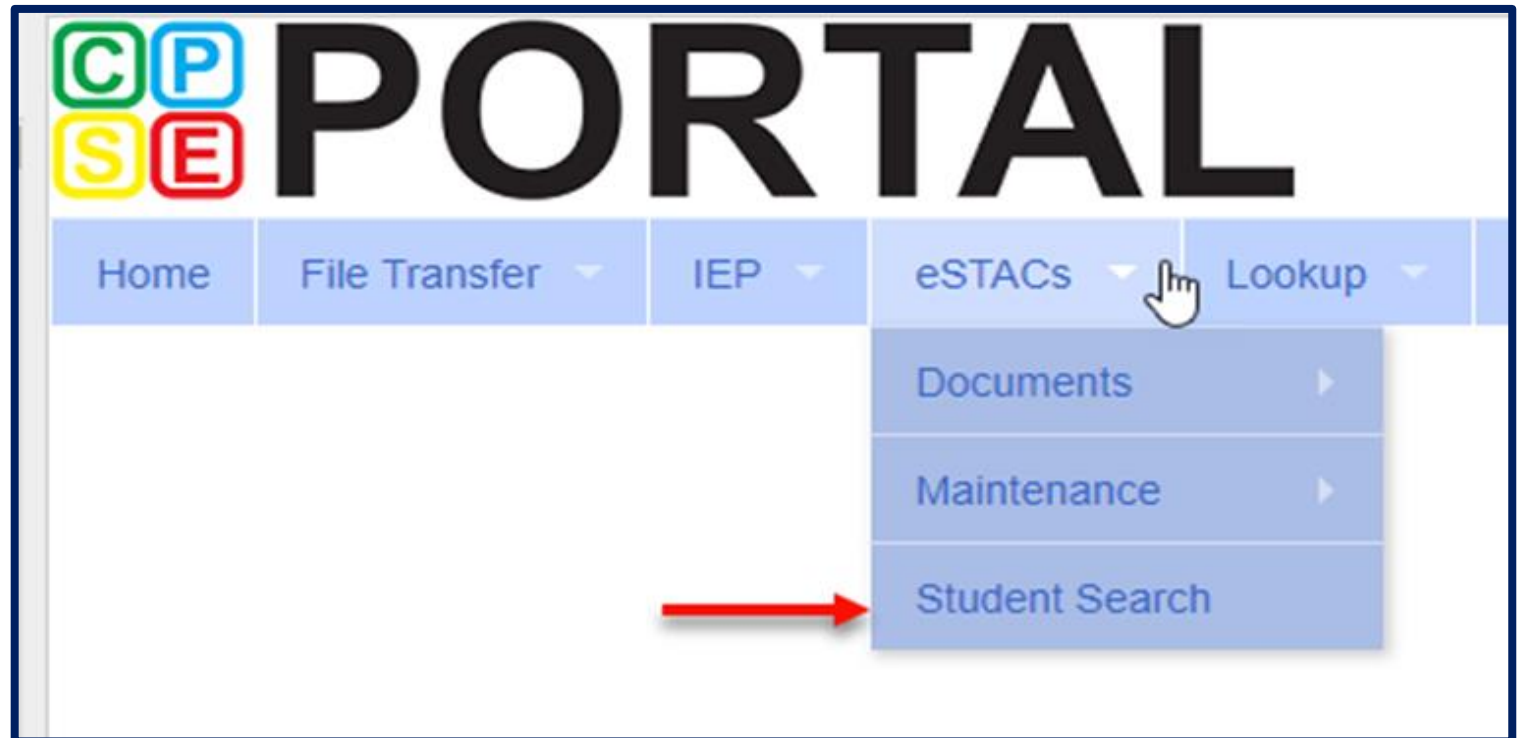
Add New Student

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**”.

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
DeFuego	Anthony	03/12/16	M			Edit	Details
DiGregorio	Charlene	02/22/16	F			Edit	Details
DiMucci	Louis	12/15/16	M			Edit	Details
Facciano	Francesca	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.

CPSE: 420901060000 BALDWINVILLE CSD


Student Information

Last Name: [REDACTED] First Name: [REDACTED] DOB: 7/12/2018 Eligibility: 7/1/2021 - 8/31/2023

STACID: CIN: Student Number: 4200049933 Edit Resync

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

eSTACs Evaluation Number	County	Description	Status	Submitted By	Submitted Date						
No STAC-5s											

Add New Evaluation 

# eSTACs vs Paper STAC-5

Evaluation Info

County\* **WESTCHESTER** 2

School Year\* **2020 - 2021**

Provider\* 1

Is this student placed in Foster Care?\* ☒ Yes ☐ No

County at time of placement\* 2

Child is: ☐ Preschool Student With a Disability ☐ Non-Disabled 4

Translation Cost 5

This student is eligible for evaluations from **09/01/2018** to **07/31/2021**

Evaluation	Component	Eval Date	Bilingual		
Social	SOC		<input type="checkbox"/>		
Psychological	PSY		<input type="checkbox"/>		
Speech/Language	SPT		<input type="checkbox"/>		
Physical Therapy	PHT		<input type="checkbox"/>		
Occupational Therapy	OCT		<input type="checkbox"/>		
Physical/Medical	PHY		<input type="checkbox"/>		
Education	EDU		<input type="checkbox"/>		6
Audiological	AUD		<input type="checkbox"/>		
Other Physician	OTH		<input type="checkbox"/>		
Other Non-Physician	OTH		<input type="checkbox"/>		
Psychiatric	PYC		<input type="checkbox"/>		
Neurological	NEU		<input type="checkbox"/>		
Optometric	OPT		<input type="checkbox"/>		
Orthopedic	ORT		<input type="checkbox"/>		
Counseling	CSL		<input type="checkbox"/>		
Functional Vision	FUV		<input type="checkbox"/>		
Teacher of Visually Impaired	TVI		<input type="checkbox"/>		
Neuropsychological	NPY		<input type="checkbox"/>		

STAC-5

The University of the State of New York  
THE STATE EDUCATION DEPARTMENT  
STAC and Medicaid Unit

Rev. 8/2017

### Request for Commissioner's Approval of Reimbursement for the Cost of Evaluations

STAC-ID

List the date each evaluation component was completed (use four digits to indicate month and year).  
For bilingual evaluations indicate on line provided.

STUDENT INFORMATION			EVALUATION COMPONENT	MONTH / YEAR	CHECK IF BILINGUAL	
Last Name	First Name	Middle Initial	Audiological	AUD	___/___/___	6
			Counseling	CSL	___/___/___	
			Education	EDU	___/___/___	
			Functional Vision	FUV	___/___/___	
			Music	MUS	___/___/___	
			Neurological	NEU	___/___/___	
			Neuropsychological	NPY	___/___/___	
			Occupational Therapy	OCT	___/___/___	
			Optometric (visual)	OPT	___/___/___	
			Orthopedic	ORT	___/___/___	
			Physical/Medical	PHY	___/___/___	
			Physical Therapy	PHT	___/___/___	
			Psychiatric	PYC	___/___/___	
			Psychological	PSY	___/___/___	
			Social	SOC	___/___/___	
			Speech / Language	SPT	___/___/___	
			Teacher of Visually Impaired	TVI	___/___/___	
			Other:		___/___/___	

Cost of translation/transmittal of evaluation documentation or summary report for monolingual evaluations only. \$ 5

PERSON COMPLETING THIS FORM	
Name	Title
Phone	Email

CERTIFICATION OF EVALUATION: I certify that the preschool child herein named received a multidisciplinary evaluation as indicated above and in accordance with Section 4410 of the Education Law and the Regulations of the Commissioner of Education.

MUNICIPALITY: The municipality of \_\_\_\_\_ has received on \_\_\_\_\_ the STAC-5 Request for Commissioner's Approval of Reimbursement for the Cost of Evaluations for the above named child pursuant to Section 4410 of the Education Law.

Signature CPSE Chairperson 1 Date \_\_\_/\_\_\_/\_\_\_

Signature of Authorized Representative of the Municipality Date \_\_\_/\_\_\_/\_\_\_

# Complete Fields Related to Evaluation

- \* Enter information regarding evaluation.
- \* All fields labeled with an asterisk (\*) must be filled in to save.

**Evaluation Info**

County\*

School Year\*

Provider\*

Is this student placed in Foster Care?\* ☐ Yes ☒ No

Child is: ☒ Preschool Student With a Disability ☐ Non-Disabled

Translation Cost

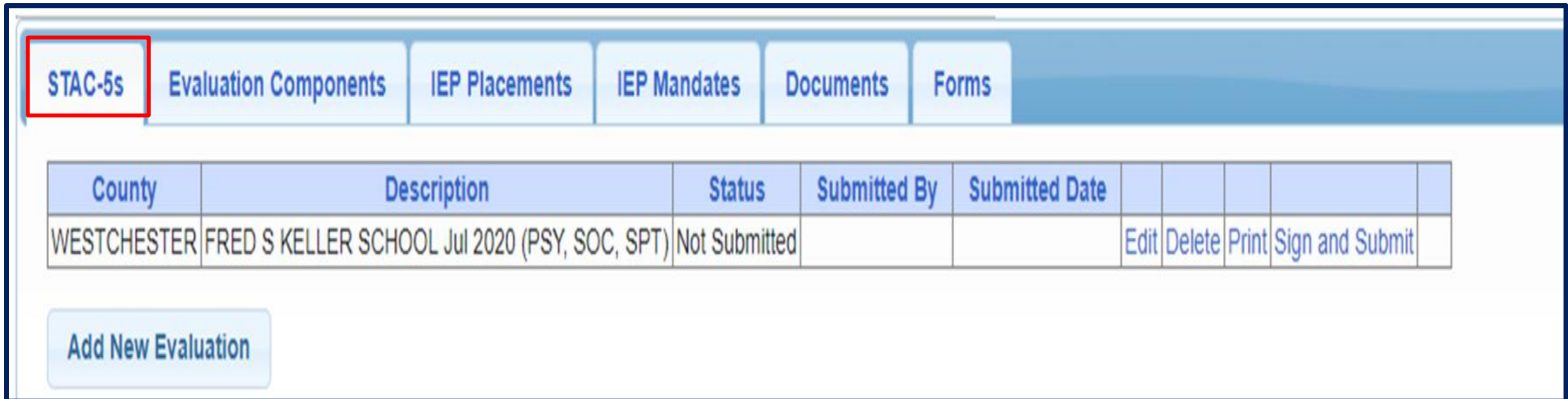
This student is eligible for evaluations from **03/01/2021** to **07/31/2023**

Evaluation	Component	Eval Date	Bilingual		
Audiological	AUD	<input type="text"/>	<input type="checkbox"/>		
Education	EDU	<input type="text"/>	<input type="checkbox"/>		
Neurological	NEU	<input type="text"/>	<input type="checkbox"/>		
Neuropsychological	NPY	<input type="text"/>	<input type="checkbox"/>		
Occupational Therapy	OCT	<input type="text"/>	<input type="checkbox"/>		
Optometric	OPT	<input type="text"/>	<input type="checkbox"/>		
Orthopedic	ORT	<input type="text"/>	<input type="checkbox"/>		
Other Non-Physician	OTH	<input type="text"/>	<input type="checkbox"/>		
Other Physician	OTH	<input type="text"/>	<input type="checkbox"/>		
Physical Therapy	PHT	<input type="text"/>	<input type="checkbox"/>		
Physical/Medical	PHY	<input type="text"/>	<input type="checkbox"/>		
Psychiatric	PYC	<input type="text"/>	<input type="checkbox"/>		
Psychological	PSY	<input type="text" value="11/01/2021"/>	<input type="checkbox"/>		
Social	SOC	<input type="text" value="11/01/2021"/>	<input type="checkbox"/>		
Speech/Language	SPT	<input type="text" value="11/01/2021"/>	<input type="checkbox"/>		
Teacher of Visually Impaired	TVI	<input type="text"/>	<input type="checkbox"/>		



# Evaluations on Student Details

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



The screenshot displays the 'STAC-5s' tab selected in a navigation bar. Below the tabs is a table with evaluation data. The table has columns for County, Description, Status, Submitted By, Submitted Date, and four action buttons: Edit, Delete, Print, and Sign and Submit. A single row of data is visible for Westchester County, Fred S Keller School, dated July 2020, with a status of 'Not Submitted'. An 'Add New Evaluation' button is located at the bottom left of the interface.

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.

STAC-5s

Evaluation Components

IEP Placements

IEP Mandates

Documents

Forms

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

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.

CPSE: 500402060000

Student Information

Last Name: [REDACTED] First Name: [REDACTED] DOB: 3/9/2017 Eligibility: 1/1/2020 - 8/31/2022

STACID: [REDACTED] CIN: [REDACTED] Student Number: 5000038460 [Edit SED Summary](#) [Resync](#)

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

### Uploaded Documents

Document Type	Uploaded Date	Applied To	Submitted Date	SubmittedUser	Comments			
No Documents								

### Missing Documents

Category	Type	DocumentDescription	Applies To		
CHILD	MEDICAID CONSENT	Medicaid Parental Consent		Show Document List	<a href="#">Upload</a>
PLACEMENT	IEP	Copy of IEP for Placement	09/10/2021-06/24/2022 RS (ST(I))	Show Document List	<a href="#">Upload</a>

[Upload](#) [Upload Multiple Documents](#)

# Uploading a Document

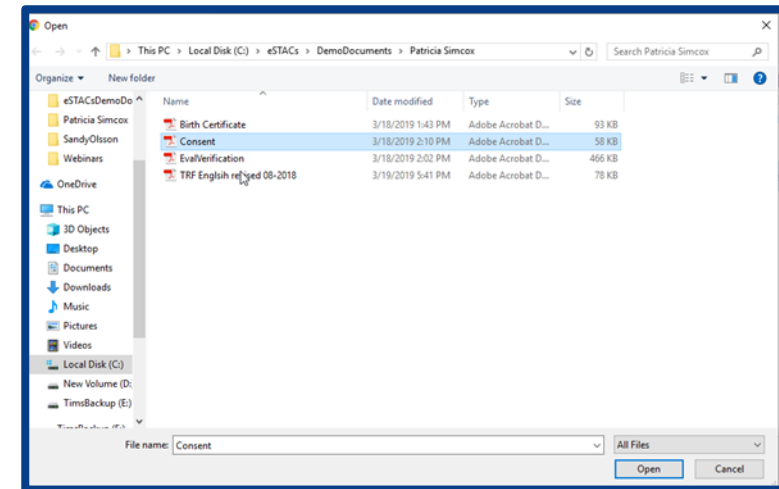
- \* Click “Choose File” button.
- \* Browse to the file location and select the file.
- \* Click the “Open” button on the file dialog
- \* The filename will appear next to “Choose File” button.
- \* Click “Upload”.

CPSE: 012806060000 RYDELL CSD

Child Information

Last Name: **Rizzo** First Name: **Frank** DOB: **12/18/2016** Eligibility: **7/1/2019 - 8/31/2022**  
STACID: CIN: [Edit](#)

**Choose File** No file chosen [Upload](#)



CPSE: 012806060000 RYDELL CSD

Child Information

Last Name: **Rizzo** First Name: **Frank** DOB: **12/18/2016** Eligibility: **7/1/2019 - 8/31/2022**  
STACID: CIN: [Edit](#)

**Choose File** **Consent.pdf** [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.

The screenshot displays a software interface with two main sections. On the left, a 'Document Type' dropdown menu is open, showing a list of document types. The 'Medicaid : Medicaid Parental Consent' option is highlighted with a red box. Below the dropdown is a 'Comments' text area. At the bottom left are 'OK' and 'Cancel' buttons. On the right, a document preview is shown, titled 'Consent to Access Student's Medicaid'. The document text reads: 'Dear Parent/Guardian of: Patricia Simcox. This is to ask your permission (consent) for to bill your or your child's Medicaid Insurance Program for special education and related services that are on your child's individualized education program (IEP) and to ask you to give us your child's Client Identification Number (CIN) or allow us to obtain the CIN if you do not know it. This consent allows the school district/county to bill Medicaid for covered health-related services and to release information to the school district's/county's Medicaid Billing Agent for that purpose. I, Mary Simcox as the parent/guardian of Patricia Simcox'.

Document Type

- Id : Birth Certificate
- Id : Passport
- Id : Adoption Papers
- Id : Legal Name Change
- Medicaid : Medicaid Parental Consent
- Medicaid : Parent Revoked Consent
- Foster Care : LDSS2999
- Eval : Evaluation Justification Letter
- Eval : Justification For Eval Outside Eligibility Dates
- Serv : Aide
- Serv : Nurse
- Serv : IEP
- Serv : Interpreter
- Serv : Summer Regression Justification
- Serv : Explanation for not having a STAC-5
- Serv : Written Order(s)
- Serv : Interim Letter of Placement
- Serv : Declassification statement
- Immunization : Proof of Immunization

Comments

OK Cancel

Consent to Access Student's Medicaid

Dear Parent/Guardian of: Patricia Simcox

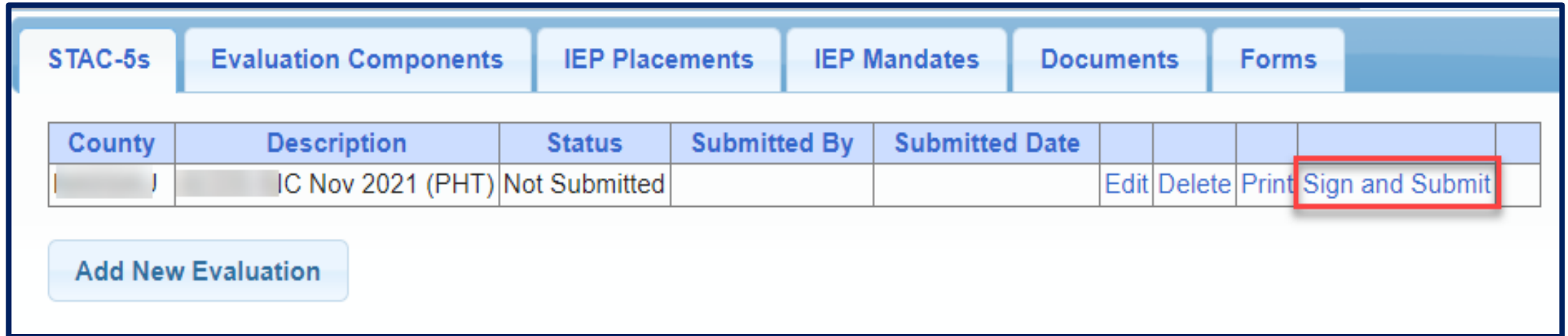
This is to ask your permission (consent) for to bill your or your child's Medicaid Insurance Program for special education and related services that are on your child's individualized education program (IEP) and to ask you to give us your child's Client Identification Number (CIN) or allow us to obtain the CIN if you do not know it.

This consent allows the school district/county to bill Medicaid for covered health-related services and to release information to the school district's/county's Medicaid Billing Agent for that purpose.

I, Mary Simcox as the parent/guardian of Patricia Simcox

# 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.



The screenshot displays a web interface for managing STAC-5 evaluations. At the top, there is a navigation bar with tabs for 'STAC-5s', 'Evaluation Components', 'IEP Placements', 'IEP Mandates', 'Documents', and 'Forms'. Below the navigation bar is a table with the following columns: 'County', 'Description', 'Status', 'Submitted By', 'Submitted Date', and three columns for actions: 'Edit', 'Delete', and 'Print'. A fourth action column, 'Sign and Submit', is highlighted with a red box. The table contains one row with the following data: County (blank), Description (IC Nov 2021 (PHT)), Status (Not Submitted), Submitted By (blank), Submitted Date (blank), Edit (link), Delete (link), Print (link), and Sign and Submit (button). Below the table is a button labeled 'Add New Evaluation'.

County	Description	Status	Submitted By	Submitted Date				
	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

Student Information

Last Name: [REDACTED] First Name: [REDACTED] DOB: [REDACTED] Eligibility: 7/1/2017 - 8/31/2020  
STACID: [REDACTED] CIN: [REDACTED] Student Number: [REDACTED] [Edit SED Summary](#)

STAC-5s

Evaluation Components

IEP Placements

IEP Mandates

Documents

Forms

Uploaded Documents

Document Type	Uploaded Date	Applied To	Submitted Date	SubmittedUser	Comments			
No Documents								

Missing Documents

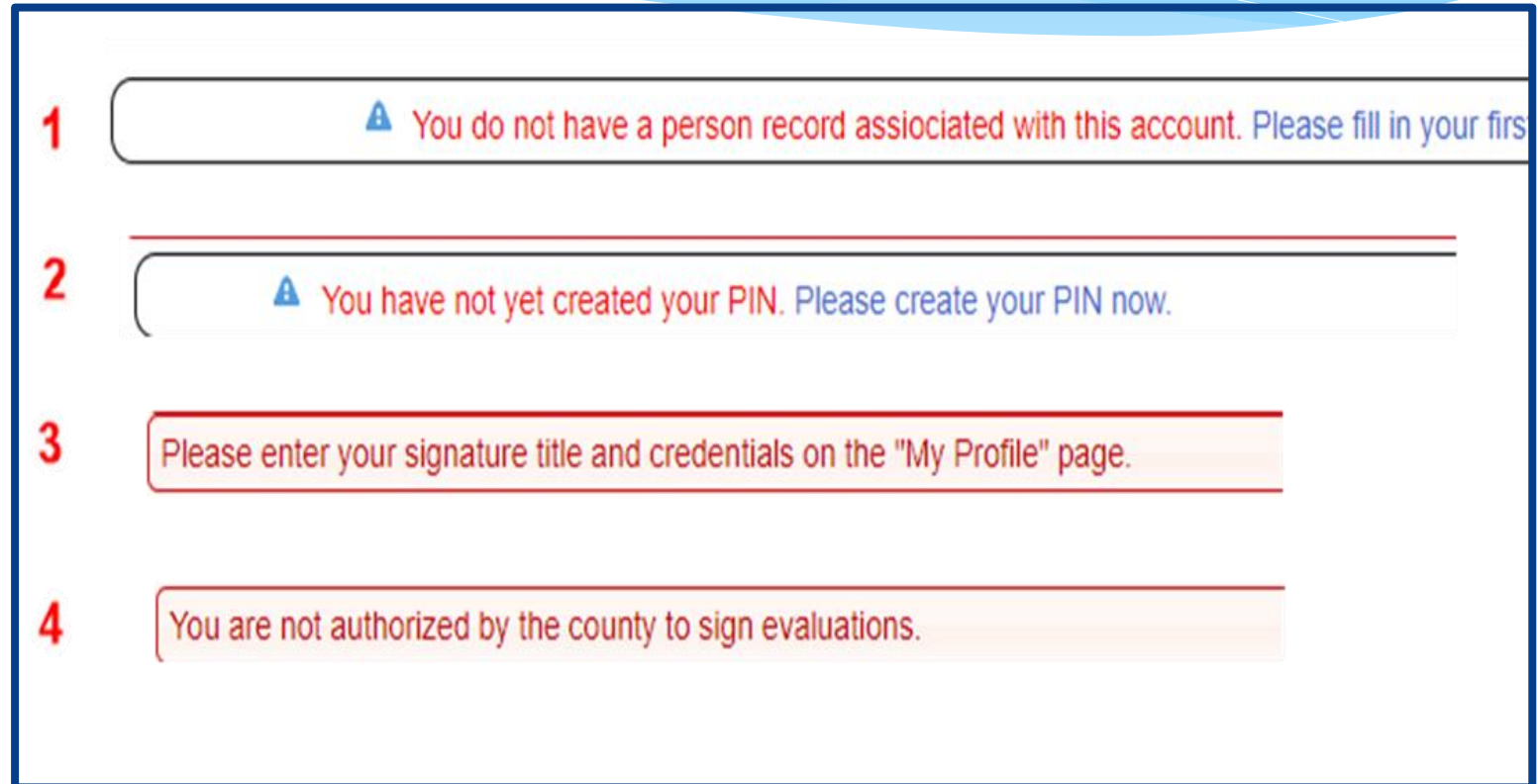
Category	Type	DocumentDescription	Applies To		
CHILD	MEDICAID CONSENT	Medicaid Parental Consent		<a href="#">Show Document List</a>	<a href="#">Upload</a>

Upload


Upload Multiple 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.

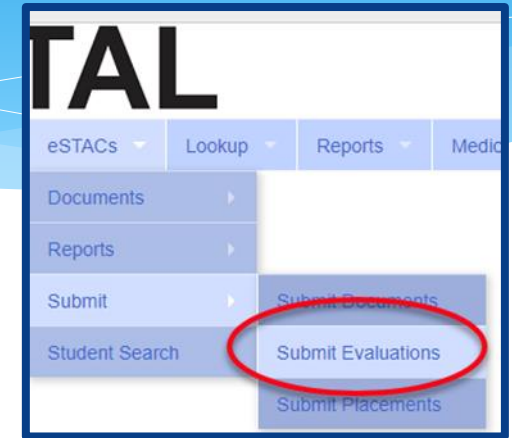


The screenshot displays a web interface with four error messages, each preceded by a red number. The messages are contained within light gray boxes with rounded corners. The first message includes a blue warning icon. The third and fourth messages are in orange boxes.

- 1  You do not have a person record associated with this account. Please fill in your first and last name.
- 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						
<div>Select All Submit</div>						
Select	Last Name	First Name	School Year	Evaluator	Components	Status
<input type="checkbox"/>		DIONNE	201819	ALL ABOUT KIDS	ALL ABOUT KIDS Mar 2019 (PSY, SOC, SPT)	OK to Submit
<input type="checkbox"/>		HARRIS	201819		ITER Feb 2019 - Mar 2019 (OCT, PHT, PSY, SOC, SPT)	OK to Submit
<input type="checkbox"/>		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		7, PSY, SOC, SPT)	Problems Found
		ADAN	201819		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>

# 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>

# 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>

# Getting Support

- \* If you need help you can contact Kelly Knowles at [Kknowles@jmcguinness.com](mailto:Kknowles@jmcguinness.com)
- \* After you are familiar with the Portal, and you need help, send an email to [eSTACs@CPSEPortal.com](mailto: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.