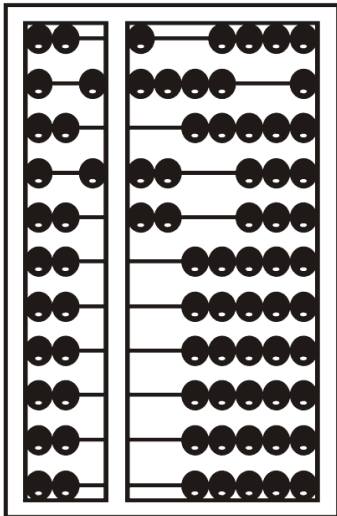


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Welcome to CPSE Portal Introduction and Initial Setup



What Is The CPSE Portal

CPSE Portal

- * CPSE Portal is a web based system that provides a mechanism for exchanging data between the County and its providers.
- * One component of this system is capturing session notes / treatment logs for provided services.

Features

- * What will functionality County vendors utilize?
 - * Recording service providers and their credentials (NPI, license, etc.)
 - * Entering Treatment logs for:
 - * SEIT services
 - * Related Services including both fee for service as well as services provided as part an approved center based preschool program
 - * Entering attendance (Present/Absent) for children attending a Center Based preschool program.
 - * Generating electronic bills to the county for SEIT, Related Services and Center Based Tuition billing.

Three Types Of Provider Users

- * **Agency Administrators:**

- * These individuals work for an agency.
- * They perform tasks as a vendor related to billing.
- * They also perform caseload management tasks such as assigning therapist to children, assigning children to classrooms (for center based children).

- * **Agency Service Providers:**

- * These individuals work for an agency as a therapist.
- * Their role is entering and signing session notes.

- * **Independent Providers:**

- * They are a service provider that performs the same tasks as an agency service provider.
- * They are a vendor that contracts directly the county and thus also has the role of billing administrator.

How Do Users Get Logins

- * The process is done by “invitations”.
- * An invitation is created to invite the individual to create a login for an agency.
- * The individual uses this invitation to create a username and password to the system.
 - * This process will be covered at the end of the webinar.
- * For Agencies: the County will create an initial invitation for an administrator. That administrator will then invite additional users for their agency.
- * The County will also create an initial invitation for the Independent Provider.
- * If you are already using CPSE Portal for another County, that same username will be used.

Process Overview - Independent Providers

- * County uploads list of children and their services (enrollments).
- * Provider enters session notes / treatment logs for the enrollments.
- * The provider digitally signs the session notes / treatment logs.
- * Billing Provider bundles signed entries into an electronic voucher.
- * Billing Provider digitally signs and submits electronic voucher to County.

Process Overview – Agency SEIT / Related Service Providers

- * County uploads list of children and their services (enrollments).
- * Agency administrator assigns the children's services to a SEIT / therapist.
- * The SEIT / therapist enters session notes / treatment logs for the enrollments.
- * The SEIT / therapist digitally signs the session notes / treatment logs.
- * Agency administrator bundles signed entries into an electronic voucher.
- * Agency administrator digitally signs and submits electronic voucher to County.

Process Overview – Approved 4410 Preschool Center Based Program

- * County uploads list of Center Based children and their included related services (CB and CBRS enrollments).
- * Agency administrator assigns children to various classrooms.
- * Agency administrator assigns the children's included related services to therapist.
- * An agency administrator or classroom teacher records children's classroom attendance (present / absent / closed).
- * The therapist enters session notes / treatment logs for the CBRS enrollments.
- * The therapist digitally signs the session notes / treatment logs.

Process Overview – Approved 4410 Preschool Center Based Program

- * An agency administrator or classroom teacher digitally signs a monthly attendance log for the classroom.
- * Agency administrator creates an electronic voucher for all Center Based children.
- * Agency administrator creates a zero dollar electronic voucher for all Center Based children's corresponding included services (CBRS).
- * Agency administrator digitally signs and submits electronic vouchers to County.

Training Webinars

- * Over the next few months we will be holding training webinars on various topics.
- * In order to maximize relevancy, the timing of the webinars will correspond to the stage of the implementation. For example, we won't be training on how to create a billing voucher in May, since that won't be used until August.
- * Each webinar will have a different target audience such as:
 - * Independent Provider
 - * Agency Service Providers
 - * Agency Service Providers and Independent Providers
 - * Agency Administrators
 - * Center Based Agency Administrators
 - * Agency Administrators and Independent Providers




Initial Set-Up For Agency Service Providers And Independent Providers




Portal Invitations

CPSE Portal



Hello, kkr . You are currently logged in for **ADMIN** (Logout)

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[Home](#) [Activities](#) [IEP](#) [eSTACs](#) [Attendance](#) [Billing](#) [Lookup](#) [Documents](#) [Reports](#) [Maintenance](#) [Medicaid Service Bureau](#) [Medicaid](#) [People](#) [My Account](#) [Knowledge Base](#)

Hide

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

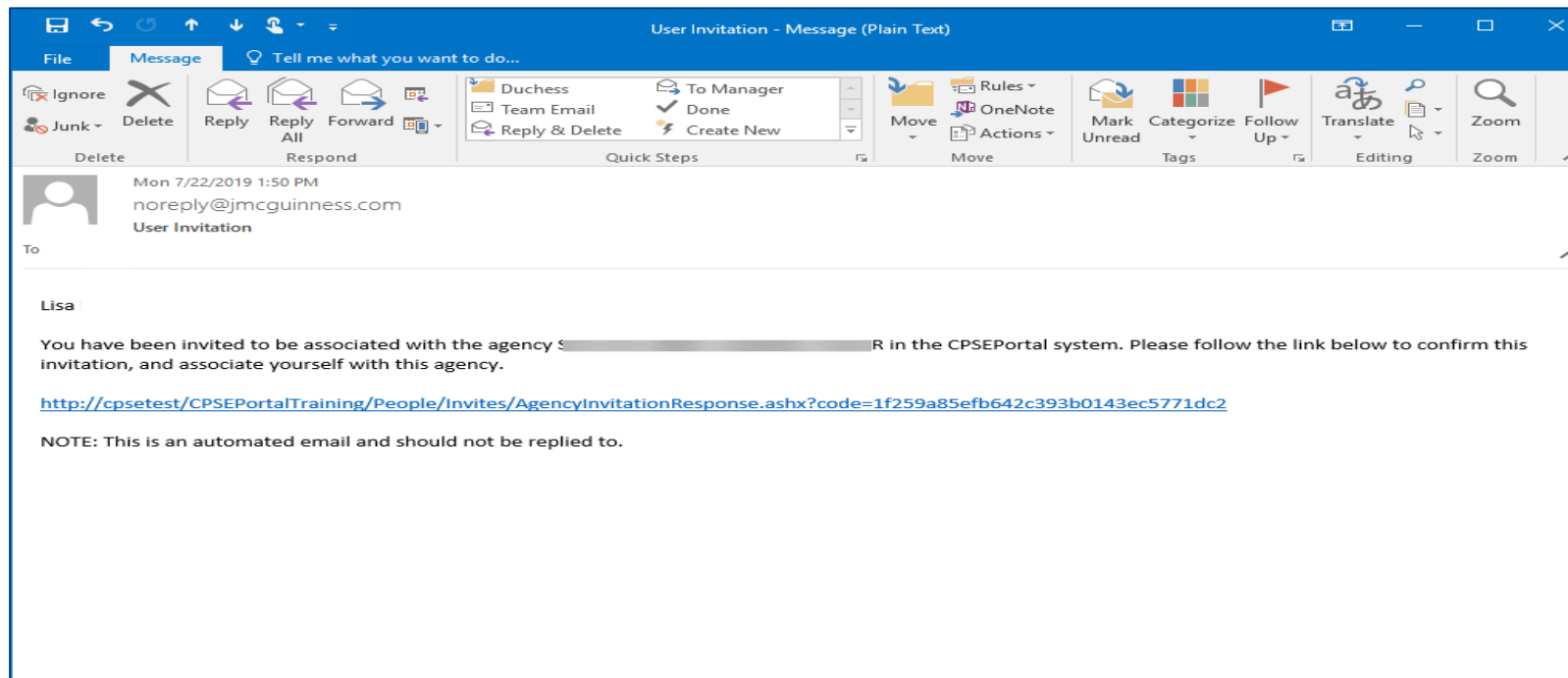
© James McGuinness & Associates

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. The email will come from ***noreply@jmcguinness.com***.



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 page. At the top, there is a header with the CPSE logo, the word "PORTAL", a "(Login)" link, and the logo for James McGuinness & Associates Inc. Consultants. Below the header, there are links for "Home" and "Knowledge Base". The main content area is titled "CPSEPortal Invitation" and contains the following sections:

- Name Confirmation - Confirm this information is correct.** This section has input fields for "First Name" and "Last Name". Red arrows point to these fields.
- Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.** This section has input fields for "NPI", "Profession", "NYS License Number", and "Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP)". Red arrows point to the "NPI", "Profession", and "NYS License Number" fields. A yellow arrow points to the "Signature, Title, and Credentials" field.
- Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.** This section has an input field for "Email". A yellow arrow points to this field.
- User Account Information** This section has input fields for "Username", "Password", and "Confirm Password". Yellow arrows point to the "Username", "Password", and "Confirm Password" fields.

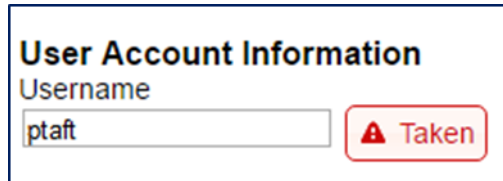
At the bottom of the form, there is a blue button labeled "Accept Invitation". The footer of the page contains the copyright notice "© James McGuinness & Associates".



Choosing Username, Password and PIN

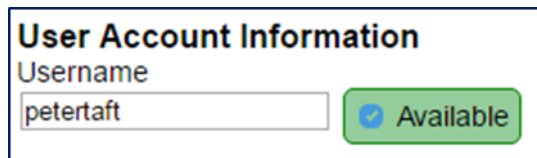
Choosing Username and Password

- * 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:



The screenshot shows a form titled "User Account Information" with a "Username" label. Below the label is a text input field containing the text "ptaft". To the right of the input field is a red button with a white triangle icon and the text "Taken".

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

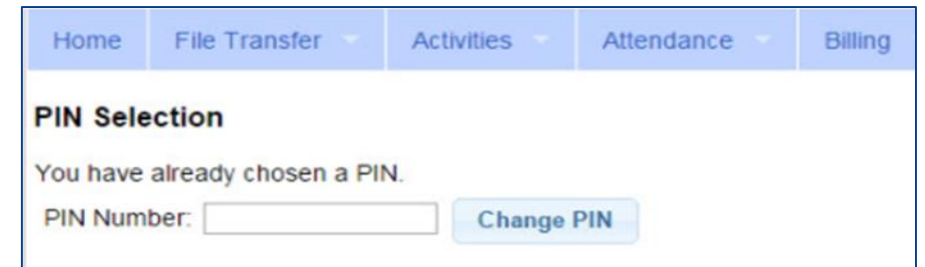


The screenshot shows a form titled "User Account Information" with a "Username" label. Below the label is a text input field containing the text "petertaft". To the right of the input field is a green button with a white checkmark icon and the text "Available".

- * 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>



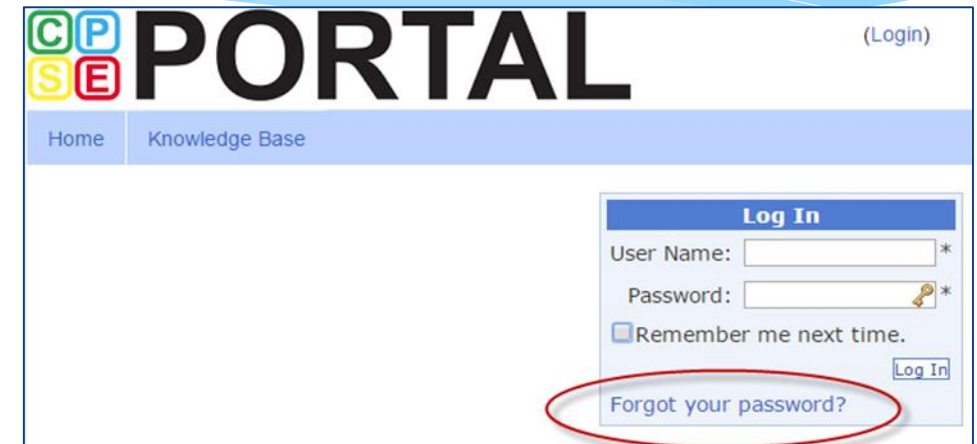
The screenshot shows a web interface with a navigation bar at the top containing links: Home, File Transfer, Activities, Attendance, and Billing. Below the navigation bar, the section is titled "PIN Selection". It contains the text "You have already chosen a PIN." followed by a label "PIN Number:" and an empty text input field. To the right of the input field is a blue button labeled "Change PIN".



The screenshot shows a "Password Verification" dialog box. It has a title bar with the text "Password Verification" and a close button (X). The main text inside says "For additional security, please re-enter your login password." Below this text is a label "Password" followed by an empty text input field. To the right of the input field is a blue button labeled "Proceed".

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

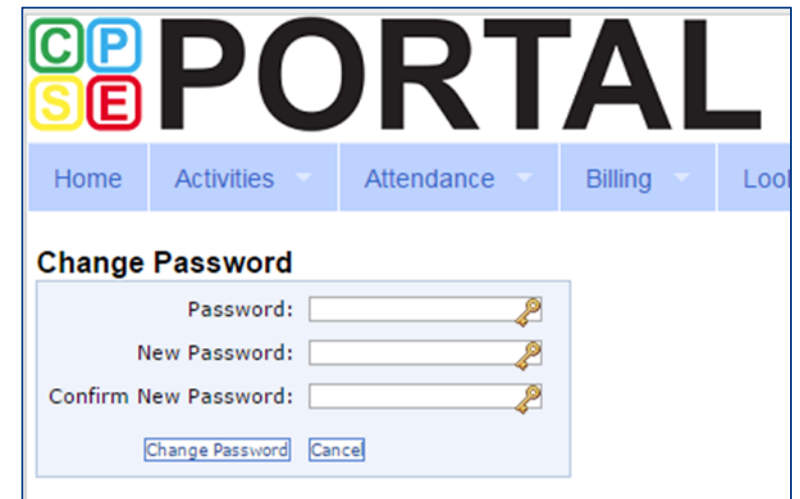
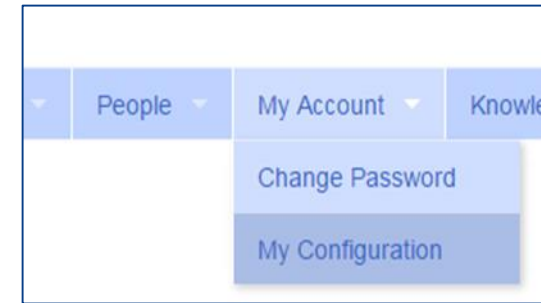
Forgot Your Password?

Enter your User Name to receive your password.

User Name:

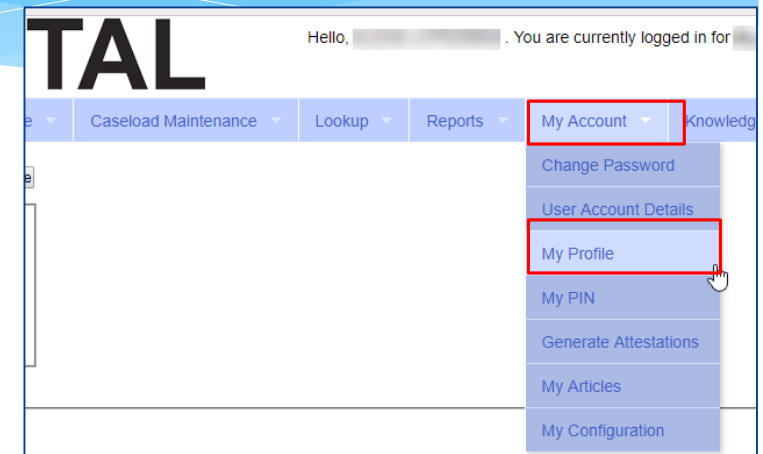
Changing Your Password

- * 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' page. The page has a header with the CPSE logo and the word 'PORTAL'. Below the header is a navigation bar with links: Home, Activities, Attendance, Billing, and Logout. The main content area is titled 'Change Password' and contains three password input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a small key icon to its right. At the bottom of the form are two buttons: 'Change Password' and 'Cancel'.

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" form. The title "My Profile" is at the top. Below it are 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". Each field has a text input box. Below the input fields is a blue "Update" button.



INDEPENDENT PROVIDERS ONLY

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			



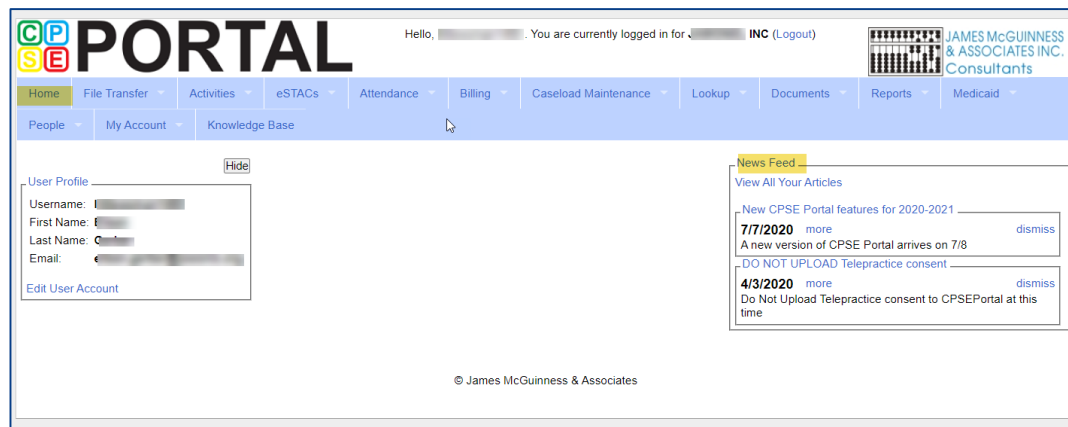
NEWS FEED

News Feed / My Articles

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

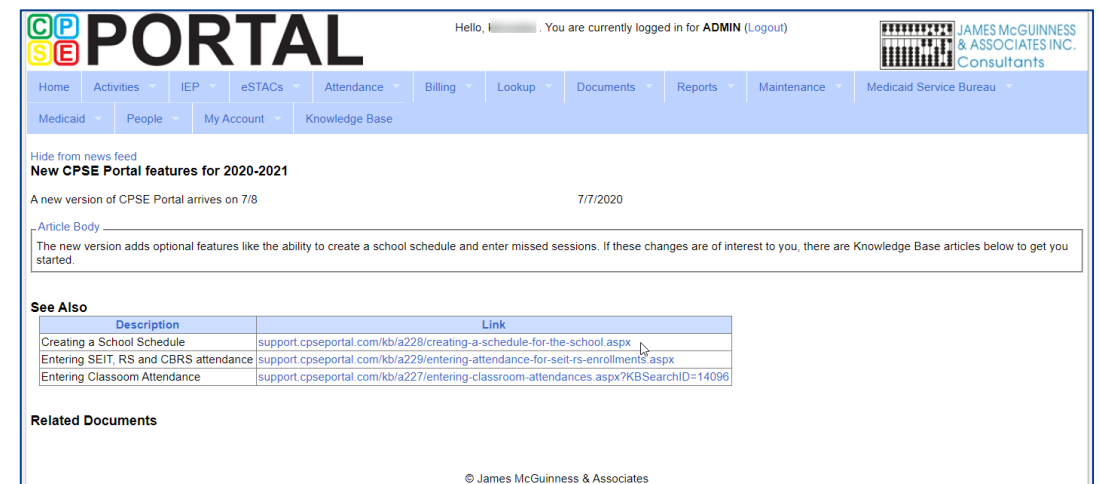
Your current News Feed will be located on your Home Page

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's a section for "User Profile" with fields for Username, First Name, Last Name, and Email. To the right, the "News Feed" section is visible, showing a list of articles. The first article is titled "New CPSE Portal features for 2020-2021" and is dated 7/7/2020. The second article is titled "DO NOT UPLOAD Telepractice consent" and is dated 4/3/2020. The footer of the page reads "© James McGuinness & Associates".

Support@CPSEPortal.com



The screenshot shows the CPSE Portal My Account 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's a section for "My Account" with links for People, My Account, and Knowledge Base. The "News Feed" section is visible, showing a list of articles. The first article is titled "New CPSE Portal features for 2020-2021" and is dated 7/7/2020. The second article is titled "DO NOT UPLOAD Telepractice consent" and is dated 4/3/2020. Below the News Feed, there's a "See Also" section with a table of links. The footer of the page reads "© 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



Initial Set-Up For Agencies



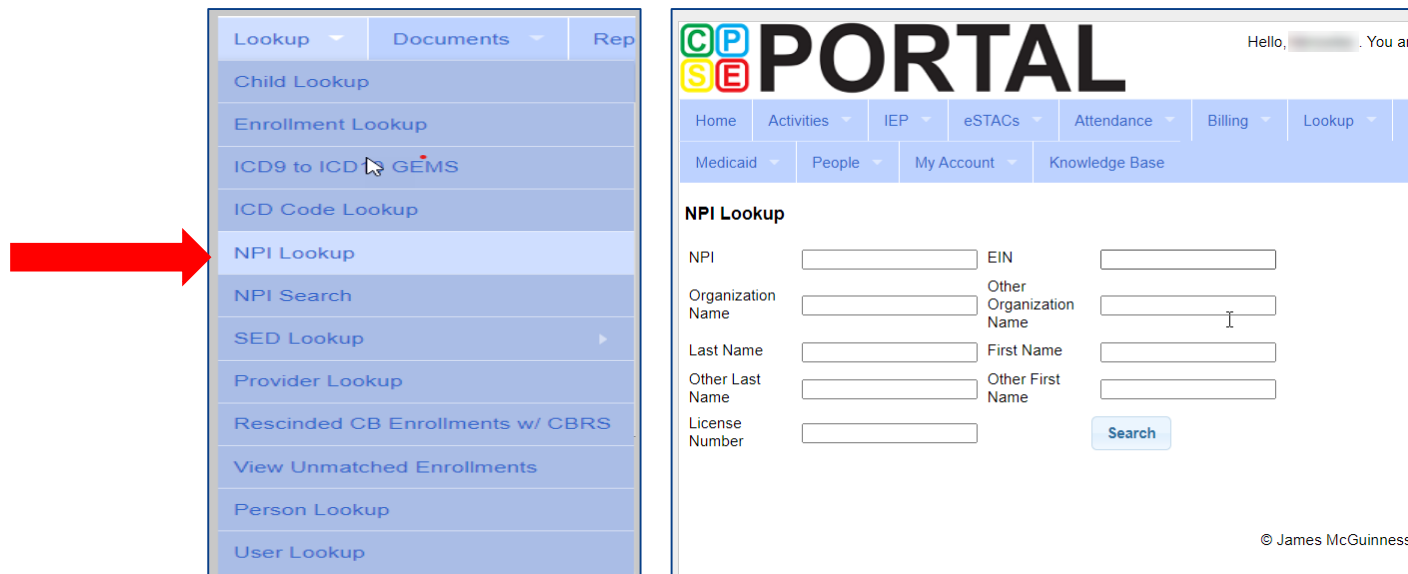
Portal Invitations

Portal Invitation Process for Agency

- * The agency is the primary link between the CPSE Portal & service providers.
- * The agency will be sent an email invitation to join the Portal.
- * You will click the link in the email and setup your password and PIN.
- * Ensure NPI/BEDS code are correct.
- * Billing providers will need to create a PIN for submitting vouchers to the county.
- * An agency will get **one** invitation, and then they can invite staff as appropriate.
- * If you already use the Portal, the county will link your current logon to their county.
- * When inviting service providers, **make sure** that their **NPI, license number, and email address** are correct. This is especially important when a service provider works for multiple agencies.

NPI Lookup

If you need to invite a service provider and do not know their NPI #, you can search for them using the NPI Lookup feature on the Lookup Menu. Go to **Lookup -> NPI Lookup**.



The image shows two screenshots from the CPSE Portal. The left screenshot displays a sidebar menu with the 'Lookup' dropdown expanded, highlighting 'NPI Lookup' with a red arrow. The right screenshot shows the 'NPI Lookup' form, which includes input fields for NPI, EIN, Organization Name, Last Name, First Name, Other Last Name, Other First Name, and License Number, along with a 'Search' button.

CPSE PORTAL Hello, [User]. You are

Home Activities IEP eSTACs Attendance Billing Lookup

Medicaid People My Account Knowledge Base

NPI Lookup

NPI EIN

Organization Name Other Organization Name

Last Name First Name

Other Last Name Other First Name

License Number

© James McGuinness



Portal Invitations – Single Service Provider Invite

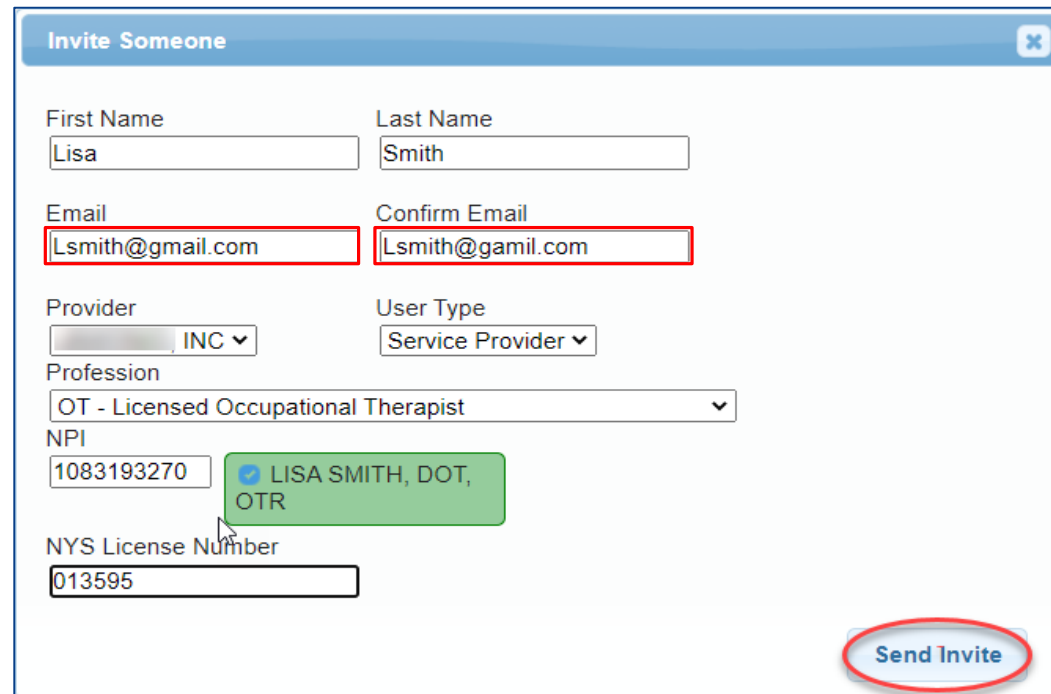
Portal Invitations – Single Service Provider Invite

Agencies will send an invitation to a Service Provider. A service provider is a person who is an individual who provides services to the child. To send an invitation, go to **People > Invitations**.

The screenshot displays the CPSE Portal interface. At the top, the logo "CPSE PORTAL" is visible on the left, and the user status "Hello, [redacted] Therapy Group. You are currently logged in for Richard [redacted] (Logout)" is on the right. Below the logo, a navigation bar contains links: Home, File Transfer, Activities, Attendance, Billing, Caseload Maintenance, Lookup, Reports, Medicaid, People, My Account, and Knowledge Base. The "People" link is selected, opening a dropdown menu with the following options: Credential Approval Listing, Provider Specific Identifiers, Service Provider Listing For School Year, Service Provider Credential Listing, Service Providers With Multiple Licenses, Service Providers With License Issues, Service Provider Credential Verification Listing, Users, People, and Invitations. The "Invitations" option is circled in red. On the left side of the page, there are two profile sections: "User Profile" (showing Username: [redacted] Therapy Group, First Name: Richard, Last Name: [redacted], Email: imell@jmcguinness.com) and "My Professional Profile" (showing Name: [redacted], NPI: I do not have an NPI, and a signature for Richard T. [redacted] PT). On the right side, there is a "News Feed" section with a message about system maintenance on 11/10/19 and 11/11/19. The footer of the page reads "© James McGuinness & Associates".

Portal Invitations – Single Service Provider Invite

After you click Invitations, the following screen appears. Fill in all of the service providers information. Note that the service providers name & credentials will appear next to their NPI #. Make sure this information is correct before clicking ***“Send Invite.”***

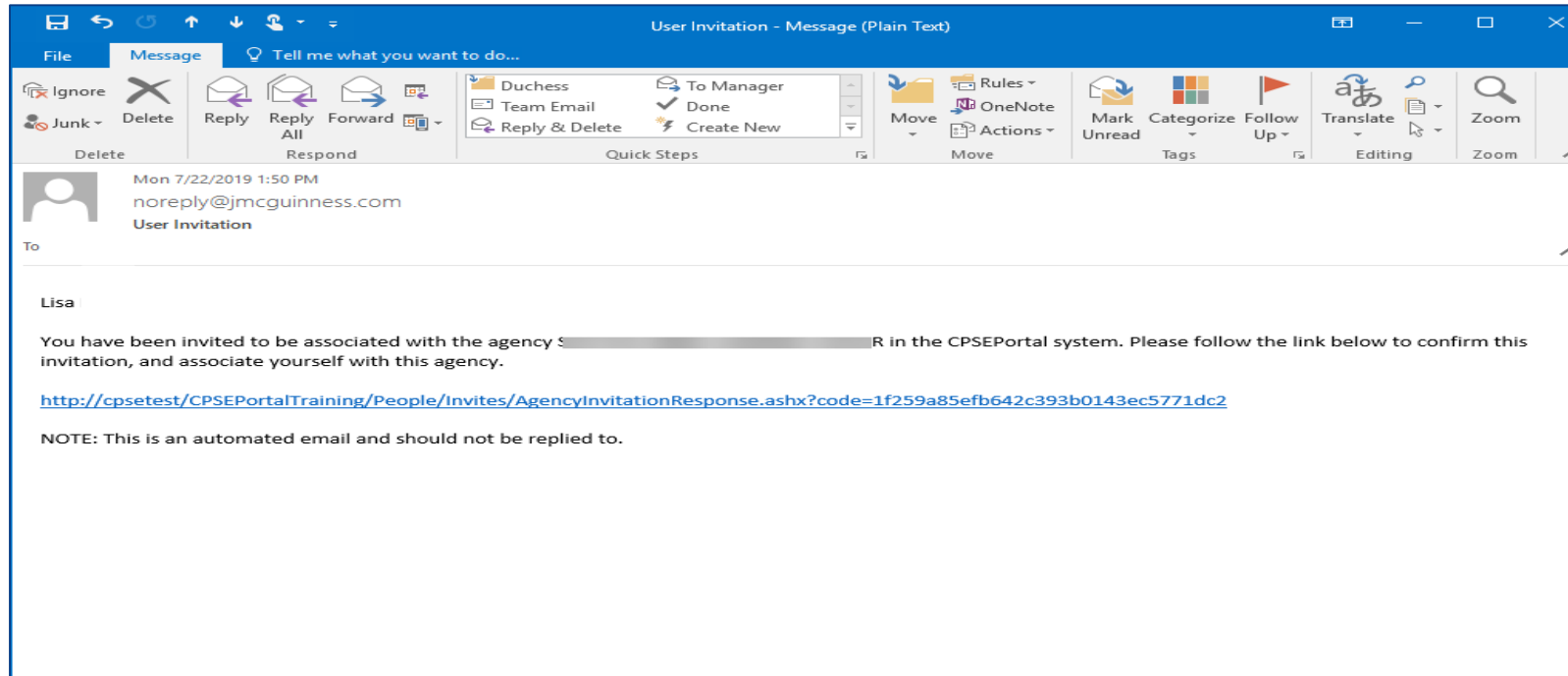


The screenshot shows a web form titled "Invite Someone" with a close button (X) in the top right corner. The form contains the following fields and options:

- First Name:** Text input field containing "Lisa".
- Last Name:** Text input field containing "Smith".
- Email:** Text input field containing "Lsmith@gmail.com", highlighted with a red rectangle.
- Confirm Email:** Text input field containing "Lsmith@gamil.com", highlighted with a red rectangle.
- Provider:** Dropdown menu with "INC" selected.
- User Type:** Dropdown menu with "Service Provider" selected.
- Profession:** Dropdown menu with "OT - Licensed Occupational Therapist" selected.
- NPI:** Text input field containing "1083193270". To its right, a green tooltip box displays "LISA SMITH, DOT, OTR".
- NYS License Number:** Text input field containing "013595".
- Send Invite:** A blue button with white text, circled in red at the bottom right of the form.

Portal Invitations – Single Service Provider Invite Sample Email

After the agency sends out the invitation, the service provider will receive the following email. The service provider will click the link to set up their account in the Portal. The email will come from ***noreply@jmcguinness.com***.



Portal Invitations – Single Provider Invite

Accepting Invitation

This screen comes up after the service provider clicks the link. The service provider will confirm everything that is shown with the red arrow, and will fill in all the yellow arrow information and then click the “**Accept Invitation**” button. At this point, the invitation process is complete.

The screenshot shows the 'CPSEPortal Invitation' page. At the top, there is a header with the 'CPSE PORTAL' logo, a '(Login)' link, and the 'JAMES MCGUINNESS & ASSOCIATES INC. Consultants' logo. Below the header, the page title is 'CPSEPortal Invitation'. A message states: '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.'

The form is divided into several sections:

- Name Confirmation - Confirm this information is correct.** This section contains 'First Name' and 'Last Name' fields. Red arrows point to these fields, indicating they should be confirmed.
- Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.** This section contains 'NPI' (1234567890), 'Profession' (OT - Licensed Occupational Therapist (063)), 'NYS License Number' (001234), and 'Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP)' fields. Red arrows point to the 'Profession' and 'NYS License Number' fields for confirmation. A yellow arrow points to the 'Signature, Title, and Credentials' field for input.
- Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.** This section contains an 'Email' field. A yellow arrow points to this field for input.
- User Account Information** This section contains 'Username', 'Password', and 'Confirm Password' fields. Yellow arrows point to these fields for input.

At the bottom of the form is a blue 'Accept Invitation' button. The footer of the page reads '© James McGuinness & Associates'.



Portal Invitations – Invite Multiple Service Providers

Portal Invitations – Invite Multiple Users

- * As an alternative the agency can also invite “multiple” service providers at once by completing the template shown below. When complete, this template is imported and all service providers listed in the template will receive the email invitation. Service provider information needed is: *First Name, Last Name, Email, NPI & Profession Code.*

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Email	Provider Specific ID	NPI	Profession Code	NY License	License From Date	License To Date
2									
3									
4									
5									
6									

- * Additional information can be found in the Knowledge Base:
- * <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175> or (search for “template” or invitations”).

Portal Profession Codes

- * The Portal Profession Codes must be entered on the template and can be found in the Knowledge Base article below.
- * <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175> or (search for “template” or invitations”).

The list of profession codes that can be used:

Profession Code	Description
AIDE	Classroom or 1:1 AIDE
AUD	Audiologist
CFY	Clinical First Year
COTA	Certified Occupational Therapist Assistant
CSP	Certified School Psychologist
CSW	Clinical Social Worker
INT	Bilingual Interpreter
LCSW	Licensed Clinical Social Worker
LMSW	Licensed Master Social Worker
LPN	Licensed Practical Nurse
MUS	Music Therapist
OT	Occupational Therapist (Registered)
OTA	Occupational Therapist Assistant
PSY	Licensed Psychologist
PT	Physical Therapist
PTA	Physical Therapist Assistant
RN	Registered Nurse
SLP	Speech & Language Pathologist
SPED	Special Education Teacher
TD	Teacher of the Deaf
TEACH	Teacher
TSHH	Teacher of Speech & Hearing Handicapped
TSLD	Teacher of Speech & Language Disabilities
TVI	Teacher of the Visually Impaired

Invitations – Multiple User Template

To send an invitation using the template, go to **People > Invitations**.



Invitations – Multiple User Template

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

Manage Invitations
User Type (All) Show Only Pending ☐

No invitations found.



Invitations – Multiple User Template Upload Template

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

Home File Transfer ▾ Activities ▾ eSTACs ▾ Attendance ▾ Billing ▾ Caseload Maintenance ▾ Lookup ▾ Documents ▾ Reports ▾ Medicaid ▾

People ▾ My Account ▾ Knowledge Base

Agency Invitation Batch Import

Select a File
The file must be an Excel spreadsheet that follows the template that has been given to you ([download template](#)). After uploading the file, we will allow you to preview the invitation batch before proceeding to the import.

Choose File No file chosen Upload

© James McGuinness & Associates

Invitations – Multiple User Template

Preview Invitations

- * This screen will show problems as well as successful imported entries.
- * Click either “Accept & Send Invites” or “Decline & Cancel”.

Agency Invitation Batch Import

Invites Preview - Accept or Decline?

Invalid Invites - Will NOT be imported

First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	Name in NPI Registry	NY License Number	Invalid Reason
Barb	Jones	bj@cpseportal.com	N	SPED				"NPI" must be valid

Valid Invites - Will be imported & sent

First Name	Last Name	Email	Is Supervisor	Profession Code	NPI	Name in NPI Registry	NY License Number
BROOKE	DEMNER	bd@cpseportal.com	N	OT	1003003567	MS. BROOKE DEMNER, OTR	123456
Christina	LOEWENSTEIN	cl@cpseportal.com	N	OT	1003004102	LAURIE CHRISTINA LOEWENSTEIN, OTR	556677
Jen	Owen-Jones	jo@cpseportal.com	N	OT	1003011255	JENNIFER JEAN OWEN, OTR	888222
NEREIDA	Wright	nw@CPSEportal.com	N	SLP	1003001595	DR. NEREIDA IRENE HILLYER-WRIGHT, PH.D.	554433

Accept & Send Invites Decline & Cancel



Portal Invitations – Office Users

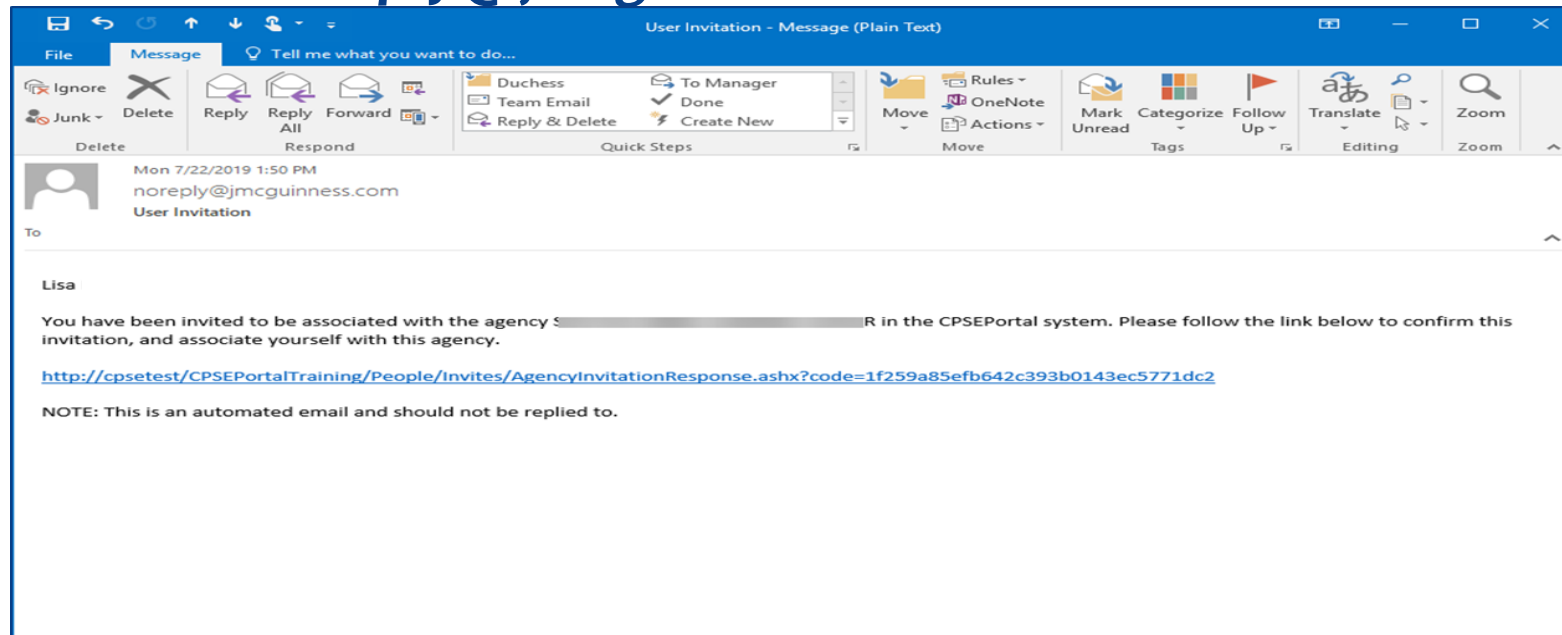
Portal Invitation – Office User

- * To send an invitation to office staff who will be using the Portal, go to **People > Invitations**.
- * The next screen will then be to Invite Someone.
- * Enter all information on this screen, and your User Type will be “Office”.
- * If your Office user will be submitting vouchers to the county, then you will need to check the box “**Allow user to submit vouchers to county**”.

A screenshot of the 'Invite Someone' form in the portal. The form contains fields for 'First Name', 'Last Name', 'Email', and 'Confirm Email'. Below these are 'Provider' and 'User Type' dropdown menus. The 'User Type' dropdown is set to 'Office'. At the bottom, there is a checkbox labeled 'Allow user to submit vouchers to county' which is checked. A red box highlights this checkbox. A 'Send Invite' button is located at the bottom right of the form. A red arrow points from the 'Invitations' option in the previous dropdown menu to this form.

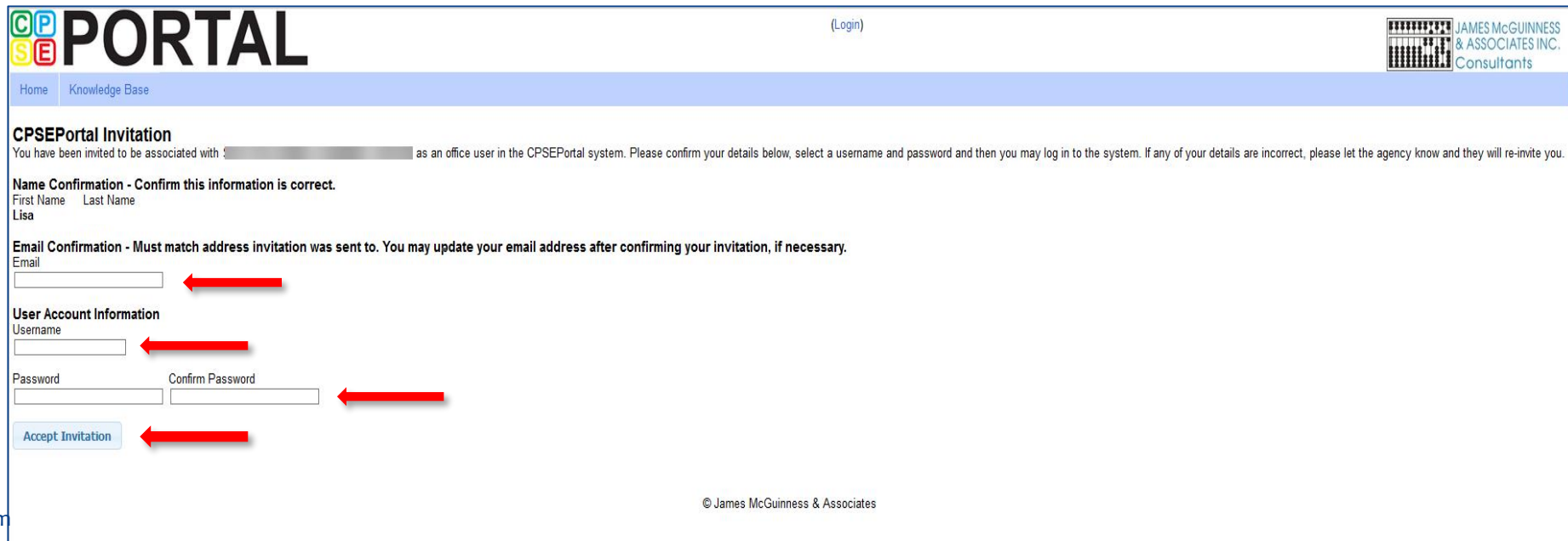
Portal Invitation – Office User

After the agency sends out the invitation, the office user will receive the following email. The office user will click the link, to set up their account in the Portal. The email will come from ***noreply@jmcguinness.com***.



Portal Invitation – Office User

This screen comes up after the office user clicks the link. The office user will fill in the information below and then click the “**Accept Invitation**” button. At this point, the invitation process is complete.



The screenshot shows the CPSEPortal Invitation page. At the top left is the CPSE PORTAL logo. At the top right is a (Login) link and the James McGuinness & Associates Inc. Consultants logo. Below the header is a navigation bar with Home and Knowledge Base links. The main content area is titled "CPSEPortal Invitation" and contains the following text: "You have been invited to be associated with [redacted] as an office 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." Below this text are four sections: "Name Confirmation - Confirm this information is correct." with First Name and Last Name fields (Last Name contains "Lisa"); "Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary." with an Email field; "User Account Information" with Username, Password, and Confirm Password fields; and an "Accept Invitation" button. Red arrows point to the Email field, the Username field, the Password field, the Confirm Password field, and the Accept Invitation button.

CPSE PORTAL (Login) JAMES MCGUINNESS & ASSOCIATES INC. Consultants

Home Knowledge Base

CPSEPortal Invitation
You have been invited to be associated with [redacted] as an office 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 Last Name
Lisa

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

User Account Information
Username [input field]
Password [input field] Confirm Password [input field]

Accept Invitation

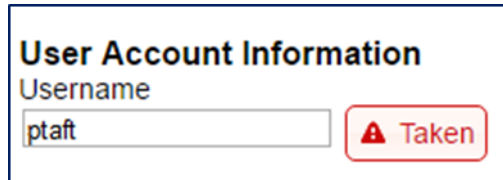
© James McGuinness & Associates



Choosing Username, Password and PIN

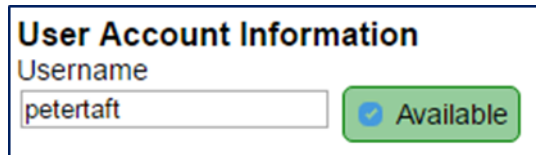
Choosing Username and Password

- * 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:



A screenshot of a web form titled "User Account Information". It contains a label "Username" above a text input field. The input field contains the text "ptaft". To the right of the input field is a red rectangular button with a white triangle icon and the text "Taken".

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

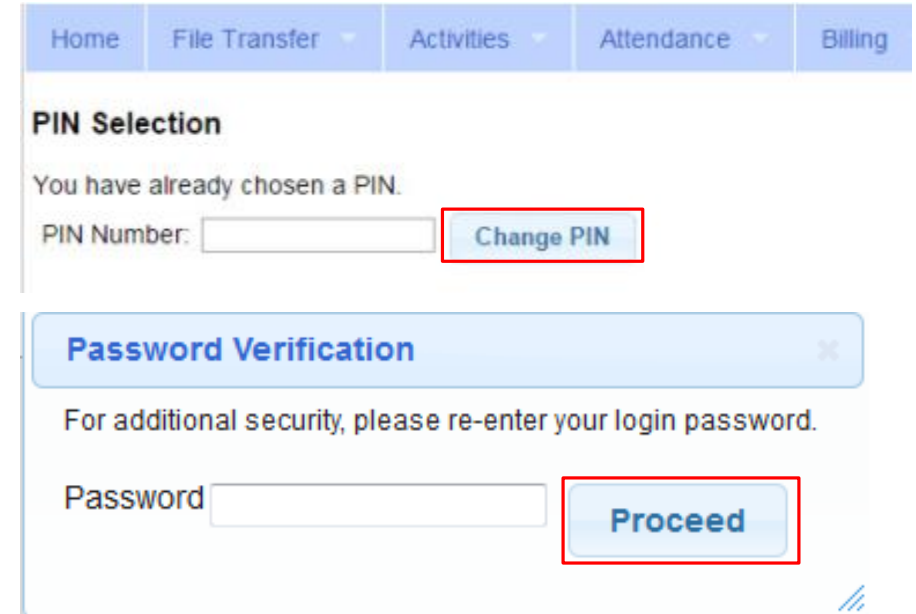


A screenshot of a web form titled "User Account Information". It contains a label "Username" above a text input field. The input field contains the text "peteraft". To the right of the input field is a green rectangular button with a white checkmark icon and the text "Available".

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

Choosing Your PIN

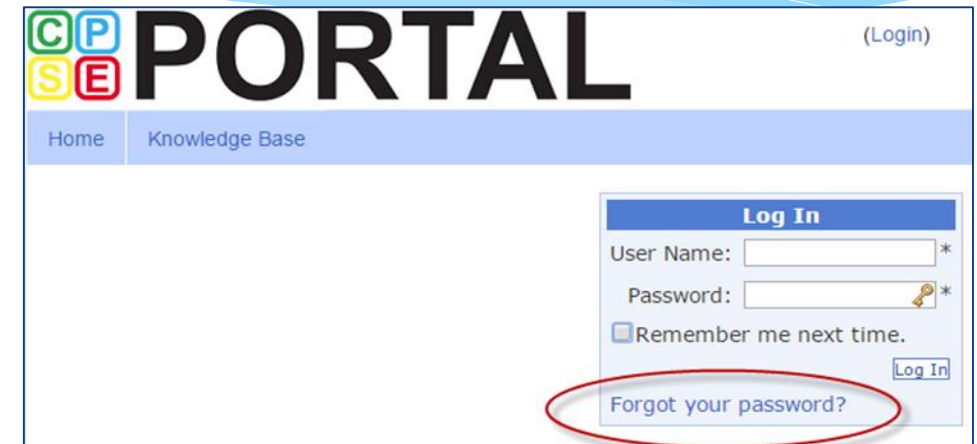
- * Choosing PIN: **My Account > My Pin**
- * Enter your PIN number and click the button (“Choose PIN” for first time PIN setup, “Change PIN” for changing current PIN)
- * Enter your **login password** (**NOT** your pin) to confirm your PIN change and click “Proceed”
 - * <http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>



The screenshot shows a web interface with a navigation bar at the top containing links: Home, File Transfer, Activities, Attendance, and Billing. Below the navigation bar is a section titled "PIN Selection". Inside this section, there is a message "You have already chosen a PIN." followed by a "PIN Number:" label and an input field. To the right of the input field is a button labeled "Change PIN", which is highlighted with a red rectangle. Below the "PIN Selection" section is a "Password Verification" section, which has a close button (X) in its top right corner. This section contains the text "For additional security, please re-enter your login password." followed by a "Password" label and an input field. To the right of the input field is a button labeled "Proceed", which is also highlighted with a red rectangle. In the bottom right corner of the form area, there is a small icon consisting of three diagonal lines.

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

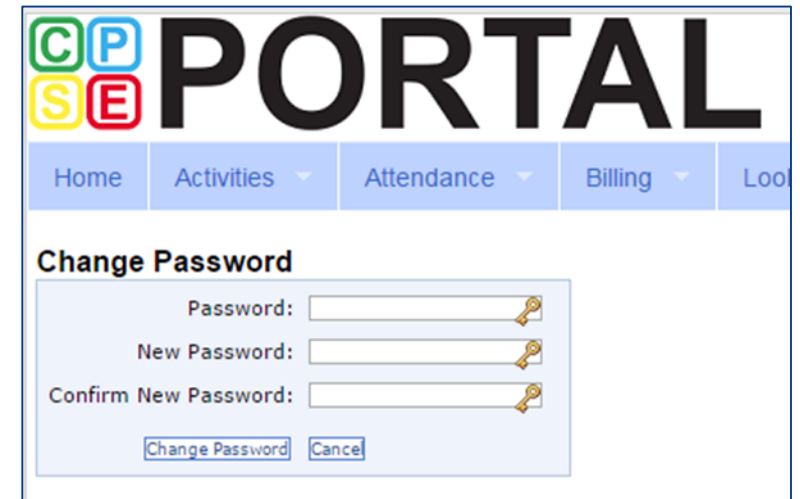
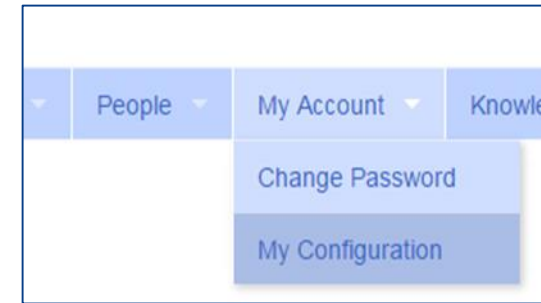
Forgot Your Password?

Enter your User Name to receive your password.

User Name:

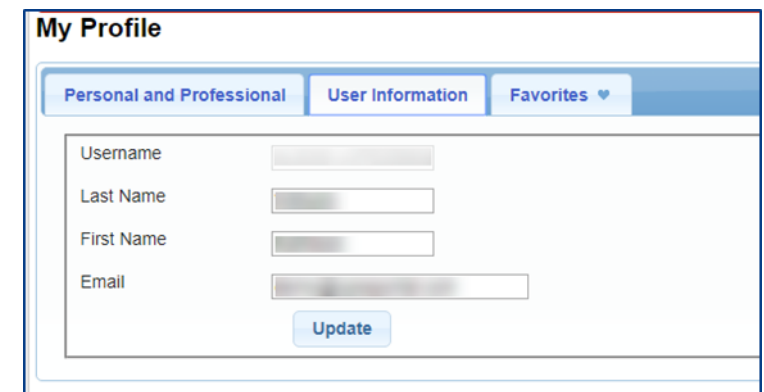
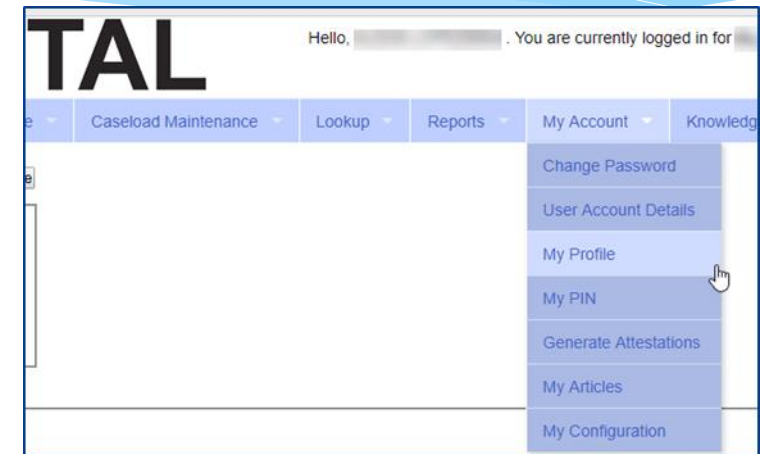
Changing Your Password

- * 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' page. The page has a header with the CPSE logo and the word 'PORTAL'. Below the header is a navigation bar with links: Home, Activities, Attendance, Billing, and Look. The main content area is titled 'Change Password' and contains three password input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a small key icon to its right. At the bottom of the form are two buttons: 'Change Password' and 'Cancel'.

Edit My User Information

- * My Profile: **My Account>My Profile** & click on “User Information” tab.
- * This screen may be used to update user name and/or email address.
- * Click “Update” and you will receive the following message: User Information Updated Successfully
- * My Profile:
 - * <http://support.cpseportal.com/kb/a59/edit-my-user-information.aspx?KBSearchID=16250>

A screenshot of the 'My Profile' page in the TAL application. The page has three tabs: 'Personal and Professional', 'User Information' (which is active), and 'Favorites'. Under the 'User Information' tab, there are four input fields: 'Username', 'Last Name', 'First Name', and 'Email'. Below these fields is a blue 'Update' button.



Agency Billing Provider Profile

Agency Billing Provider Profile

- * Agencies will need to create a Billing Provider Profile.
- * Go to ***My Account > Billing Provider Profile***



Agency Billing Provider Profile

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

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			



Portal User Access

Portal Admin- User Access

- * Go to **People > Users**
- * Within User Access:
 - * See all users assigned to your agency
 - * Assign role of Billing Staff
 - * Assign role of Service Provider
 - * Remove access to Portal or delete provider or roles



Portal Admin- User Access

Viewing/changing Existing Users

You will check off if a staff member is a Service Provider, Supervisor, a Basic User or a Billing Admin. Some staff may have more than 1 box checked.

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

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

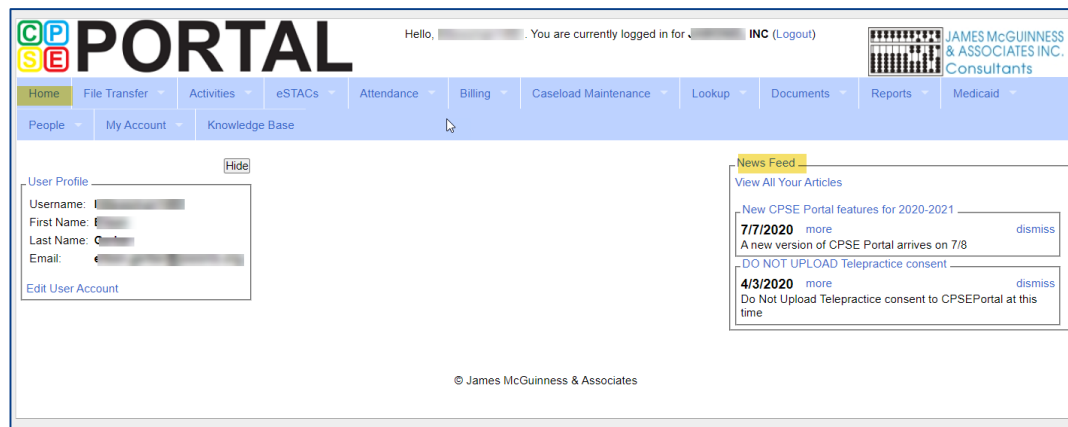


News Feed

News Feed / My Articles

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

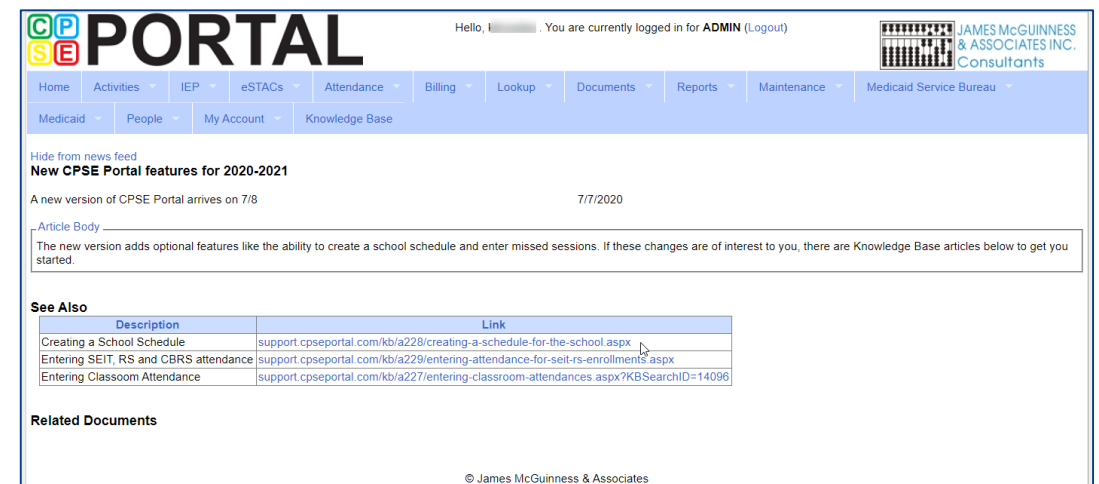
Your current News Feed will be located on your Home Page



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. A secondary bar includes 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 visible, showing a list of articles with dates and links to view more or dismiss them. The footer includes the copyright notice for James McGuinness & Associates.

Support@CPSEPortal.com

For all News Feed articles:
My Account->My Articles->View



The screenshot shows the CPSE Portal My Account -> My Articles -> View page. The top navigation bar is the same as the Home Page. The main content area shows a list of articles with dates and links to view more or dismiss them. Below the list, there is a 'See Also' section with a table of related articles. The footer includes the copyright notice for James McGuinness & Associates.

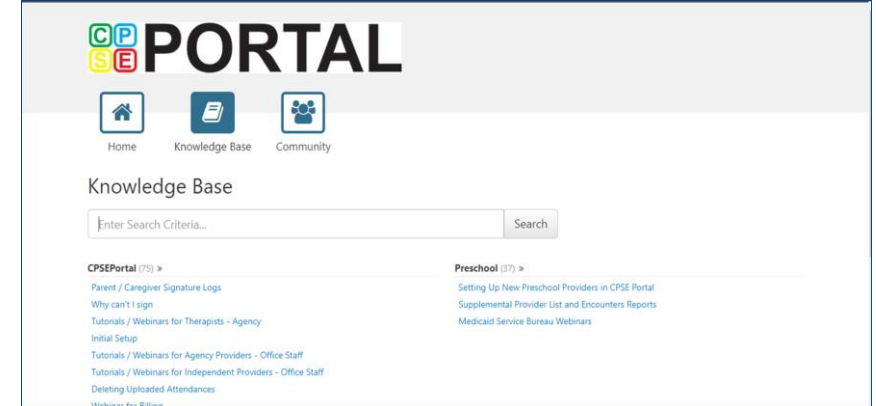
Description	Link
Creating a School Schedule	support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx
Entering SEIT, RS and CBRS attendance	support.cpseportal.com/kb/a229/entering-attendance-for-seit-rs-enrollments.aspx
Entering Classroom Attendance	support.cpseportal.com/kb/a227/entering-classroom-attendances.aspx?KBSearchID=14096



Closing

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 (ALL Agency Staff, Agency Service Providers & Independent Providers):

- Wednesday, July 13, 2022 at 10:00am <https://attendee.gotowebinar.com/register/1546136973231903244>
- Thursday, July 14, 2022 at 4:00pm <https://attendee.gotowebinar.com/register/1024310953712741390>

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 Agency Case Management:

- Friday, July 15, 2022 at 10:00am <https://attendee.gotowebinar.com/register/779770771602512398>
- Monday, July 18, 2022 at 2:00pm <https://attendee.gotowebinar.com/register/965650908859477259>

Topics Covered During This Webinar:

- Child Lookup
- Unmatched Children and Enrollments
- Assigning Children to Therapist
- Matching Children & Enrollments
- Classroom Management
- Creating a School Schedule
- Entering & Signing Classroom Attendance
- Reports

Upcoming Webinars

CPSE Portal Case Management for Independent Providers:

- Wednesday, July 20, 2022 at 10:00am

<https://attendee.gotowebinar.com/register/4283477823208525840>

- Thursday, July 21, 2022 at 4:00pm

<https://attendee.gotowebinar.com/register/1390691317832243983>

Topics Covered During This Webinar:

- Child Lookup
- Unmatched Children and Enrollments
- Matching Children and Enrollments
- Prescriptions
- Reports

Upcoming Webinars

CPSE Portal Case Management for Agency Service Providers:

- Tuesday, July 19, 2022 at 2:00pm

<https://attendee.gotowebinar.com/register/7659074177992571150>

- Thursday, July 21, 2022 at 10:00am

<https://attendee.gotowebinar.com/register/2176035090157397775>

Topics Covered During This Webinar:

- What are Unmatched Enrollments
- Prescriptions
- Reports

Upcoming Webinars

CPSE Portal Session Notes (ALL Agency, Agency Service Providers & Independent Providers):

- Tuesday, August 2, 2022 at 3:00pm

<https://attendee.gotowebinar.com/register/6740859923009049614>

- Wednesday, August 3, 2022 at 10:00am

<https://attendee.gotowebinar.com/register/1864552242101707276>

Topics Covered During This Webinar:

- Recap Entering/Signing Classroom Attendance
- Attendance Entry Record
- Creating Defaults for Session Notes
- Signing Attendance/Review & Sign
- Co-Signing Session Notes/Attendance
- Un-signing Attendance/Making Corrections After Signing
- Printing Logs
- Reports

Upcoming Webinars

CPSE Portal Agency Billing Using the CPSE Portal:

- Wednesday, July 27, 2022 @ 10:00AM

<https://attendee.gotowebinar.com/register/8664496196848543245>

- Thursday, July 28, 2022 @ 2:00PM

<https://attendee.gotowebinar.com/register/3681781079139823116>

- Wednesday, August 31, 2022 @ 10:00AM

<https://attendee.gotowebinar.com/register/2264947097052826636>

- Wednesday, September 28, 2022 at 2:00pm

<https://attendee.gotowebinar.com/register/1385477432808800524>

Upcoming Webinars

CPSE Portal Agency Billing Using the CPSE Portal (con't):

- Thursday, September 29, 2022 at 10:00am

<https://attendee.gotowebinar.com/register/8744634102724070927>

Topics Covered During This Webinar:

- Review Portal Invitations
- Review Portal Admin – User Access
- Review Credential Verification
- Creating & Submitting Vouchers
- How to Correct Attendance & Rebill
- Items Not Ready To Bill Report
- Move Attendance Between Enrollments
- Voucher Listing Report

Upcoming Webinars

CPSE Portal Billing for Independent Providers:

- Wednesday, July 27, 2022 @ 4:00PM

<https://attendee.gotowebinar.com/register/1689973983981907472>

- Thursday, July 28, 2022 @ 10:00AM

<https://attendee.gotowebinar.com/register/6992705259489814542>

- Wednesday, September 28, 2022 at 10:00am

<https://attendee.gotowebinar.com/register/2703765487118177293>

- Thursday, September 29, 2022 at 4:00pm

<https://attendee.gotowebinar.com/register/2998072863151745291>

Topics Covered During This Webinar:

- Creating & Submitting Vouchers
- How to Correct Attendance & Rebill
- Items Not Ready To Bill Report
- Move Attendance Between Enrollments
- Voucher Listing Report

Upcoming Webinars

CPSE Portal Billing Using an Outside System:

- Friday, July 29, 2022 @ 10:00AM <https://attendee.gotowebinar.com/register/6629339756254111502>
- Wednesday, August 31, 2022 @ 2:00PM <https://attendee.gotowebinar.com/register/5249632983302216973>
- Tuesday, September 27, 2022 @ 10:00AM <https://attendee.gotowebinar.com/register/6951037067332133643>

Topics Covered During This Webinar:

- Review of Import Person with License Template
- Review Credential Verification
- Schema Attendance File
- Validate Attendance File
- Upload Attendance File
- Creating Vouchers
- Submitting Vouchers
- Attendance Denied – How to Rebill
- Voucher Listing Report

Knowledge Base Links

- * Template to Import Multiple Therapists & Portal Profession Codes:
<http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175>
- * Forgot Your Password:
<http://support.cpseportal.com/kb/a49/forgot-your-password.aspx?KBSearchID=16316>
- * Choosing A PIN:
<http://support.cpseportal.com/kb/a125/choosing-a-pin.aspx?KBSearchID=16318>
- * Edit My User Information:
<http://support.cpseportal.com/kb/a59/edit-my-user-information.aspx?KBSearchID=16250>

Closing remarks

- * The Portal is a helpful tool for both the County and their preschool providers
- * CPSE Portal Address (you may want to bookmark):
<https://www.cpseportal.com>
- * In addition to the Portal Knowledge base, our Helpdesk is available through email at support@CPSEPortal.com