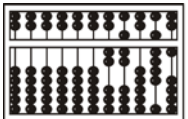


# CPSE Portal

Introduction For Service Providers



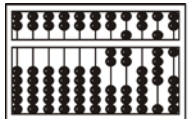
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**CPSE** PORTAL

# Webinar Getting Started

CPSE Portal is located at

<https://www.cpseportal.com/>

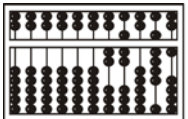


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**CPSE** PORTAL

# Webinar Outline

- ▶ Overview
- ▶ Support Resources
- ▶ Accounts & Invitations
- ▶ Managing profile
- ▶ Viewing Caseload
- ▶ Defaults

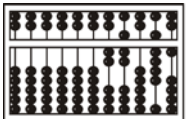


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**C P**  
**S E** **PORTAL**

# Overview – What is CPSE Portal?

- ▶ A web based system used to capture CPSE attendance and treatment information that so that it can be electronically submitted to the County
- ▶ This information can be used to
  - ▶ Pay the agency / provider for the services that were provided per the IEP
  - ▶ Submit billing to Medicaid
  - ▶ Document that services were provided per all rules and regulations
- ▶ A primary reason for Counties to use this type of system is to address changing requirements in compliance and reporting, especially Medicaid

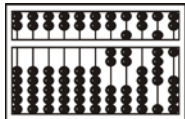


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**CPSE** PORTAL

# Resources

- ▶ Email [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
- ▶ CPSE Portal support site <http://support.cpseportal.com>
  - ▶ Knowledge Base Articles
- ▶ Knowledge Base Menu from [www.CPSEPortal.com](http://www.CPSEPortal.com)

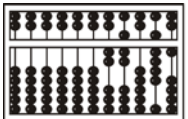


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# Independent Provider vs. Agency Provider

- ▶ An Independent Provider
  - ▶ Contracts directly with the County.
  - ▶ has a vendor number for the county
  - ▶ Submits bills directly to the County
  - ▶ Receives payment directly from the County
- ▶ An Agency Provider
  - ▶ Works for an agency/school
  - ▶ Submits information to Agency/school
  - ▶ Agency bills county, not service provider
  - ▶ Service provider is paid by Agency/school

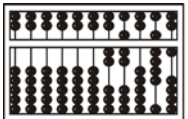


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# Billing Provider vs. Service Provider

- ▶ A Billing Provider (think Agency or School)
  - ▶ Can be an individual or corporation
  - ▶ Has a vendor contract with the County
  - ▶ Submits bills to County
  - ▶ Receives payment from County
- ▶ A Service Provider (think therapist)
  - ▶ Is an individual
  - ▶ Provides the services to the child

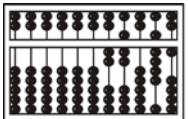


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# Agency is the primary link between CPSE Portal and service providers

- ▶ We cannot individually train/support the thousands of therapists and teachers that use CPSE Portal
- ▶ Service Providers should attend webinars
- ▶ If they can't attend, they should watch recorded webinars
- ▶ They should look for answers on the Knowledge Base



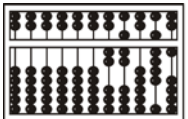
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# Account Setup

- ▶ Independent Providers
  - ▶ Complete the setup form
  - ▶ Will receive an email
- ▶ Agency providers
  - ▶ DO NOT complete setup form
  - ▶ Your Agency will add you to the system and invite you to join

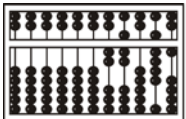


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# Single Account for all Agencies

- ▶ You only need one account for CPSE Portal
- ▶ One account for multiple agencies
- ▶ Same account if you are both an independent provider and an agency provider
- ▶ Same account if you work for multiple Counties
- ▶ One single account, even if you work as an independent provider for one County and an agency provider for a different County



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# Independent Provider Setup Form

## Setup for Independent Provider

User information for CPSEPortal administrative user

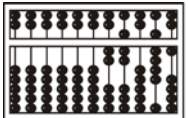
First Name	
Last Name	
Email	
Phone #	
Individual NPI	
Profession (OT, PT, SLP, etc.)	
NY License #	

If you are currently incorporated and operate under a corporate name and tax id, also complete this section.

Corporate Name	
Organization NPI	

If you currently use CPSEeXchange / CPSEPortal for obtaining Confirmation Notifications and wish your primary administrative username to remain, please indicate your current CPSEPortal username

Existing CPSE Portal Username	
-------------------------------	--

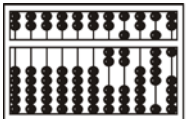
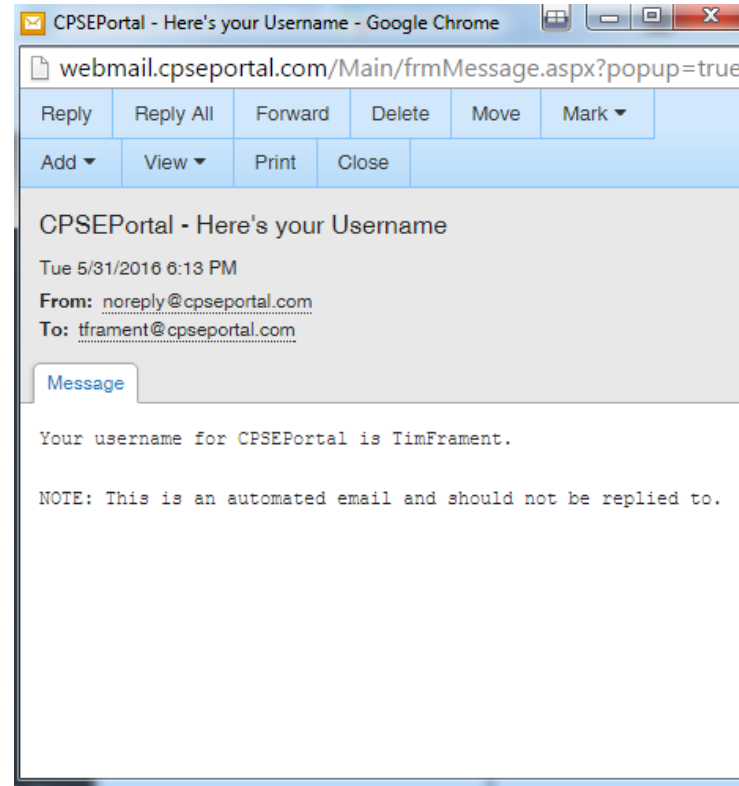
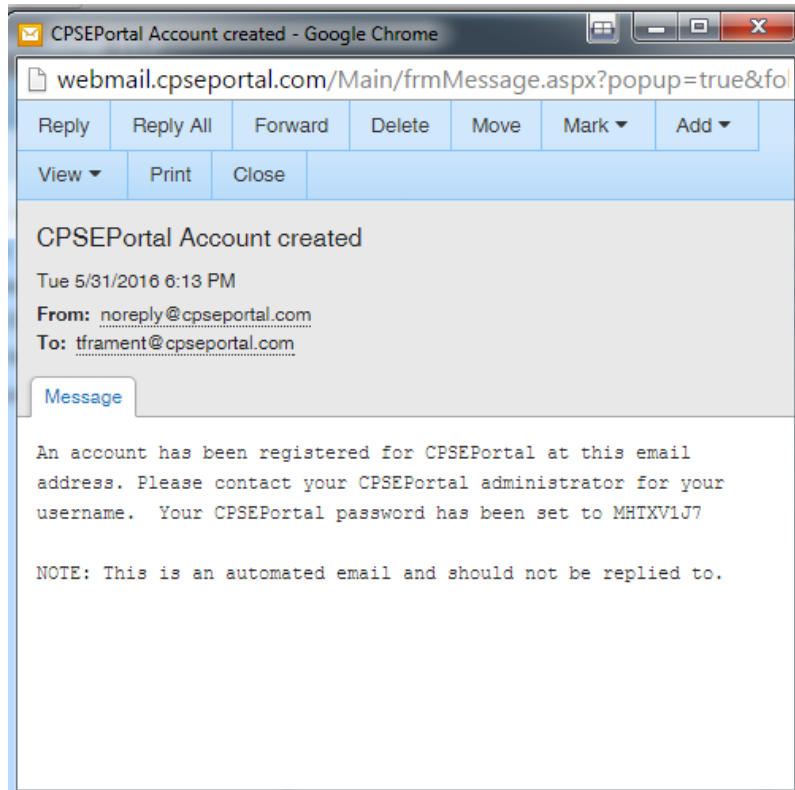


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# Username and Password emails

- ▶ Two emails, one with username one with password
- ▶ Both come from NoReply@CPSEPortal.com

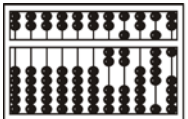


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# Agency Provider Account Setup - Invitation

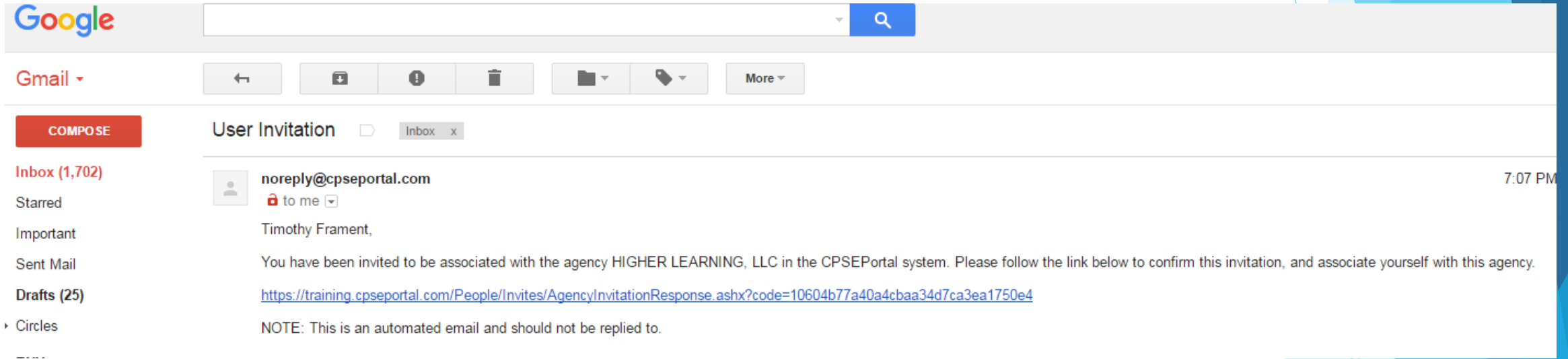
- ▶ Your agency will add you to the CPSE Portal and create a digital invitation
- ▶ The digital invitation will appear in an email
- ▶ To create account, click the link in the email and
  - ▶ Confirm all the information is correct. If it is incorrect, do not accept invitation and contact agency to correct it and resend new invitation
  - ▶ Enter your Signature Title and Credentials exactly written out as when you professionally sign documents with pen and paper
  - ▶ Choose a unique username
  - ▶ Choose a password
  - ▶ Accept the invitation



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# Invitation Email



The screenshot shows a Gmail interface. At the top is the Google search bar. Below it is the Gmail navigation bar with a 'Gmail' dropdown and several icons (back, forward, search, trash, etc.). On the left is a sidebar with a 'COMPOSE' button and a list of folders: 'Inbox (1,702)', 'Starred', 'Important', 'Sent Mail', 'Drafts (25)', and 'Circles'. The main area displays an email titled 'User Invitation' from 'noreply@cpseportal.com' received at 7:07 PM. The email content includes a greeting to Timothy Frament, an invitation to join the agency HIGHER LEARNING, LLC, and a link to confirm the invitation. A note at the bottom states that the email is automated and should not be replied to.

Google

Gmail

COMPOSE

Inbox (1,702)

Starred

Important

Sent Mail

Drafts (25)

Circles

User Invitation

noreply@cpseportal.com

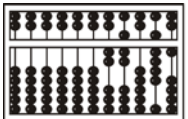
to me

Timothy Frament,

You have been invited to be associated with the agency HIGHER LEARNING, LLC in the CPSEPortal system. Please follow the link below to confirm this invitation, and associate yourself with this agency.

<https://training.cpseportal.com/People/Invites/AgencyInvitationResponse.aspx?code=10604b77a40a4cbaa34d7ca3ea1750e4>

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



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# Sample invitations to provider

## CPSEPortal Invitation

You have been invited to be associated with **HIGHER LEARNING, LLC** as a service provider user in the CPSEPortal system. Please confirm your details below, select a username and password and then you may log in to the system. If any of your details are incorrect, please let the agency know and they will re-invite you.

### Name Confirmation - Confirm this information is correct.

First Name    Last Name  
Todd            Blowers

### Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.

NPI                    1003000340  
Profession            SLP - Speech & Language Pathologist (058)  
NYS License Number    675432


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

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

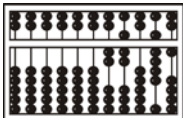
Email

### User Account Information

Username

Password                    Confirm Password  
   

[Accept Invitation](#)



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 PORTAL

# Choosing username and password

- ▶ Choose a good username that can be remembered (name, email address, first initial + last name, etc.)
- ▶ If your desired username is in use by somebody else, the screen will show you

## User Account Information

Username

 ⚠ Taken

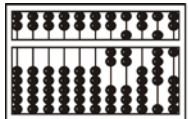
- ▶ If your preferred username is unavailable, try again until you find an available one

## User Account Information

Username

 ✔ Available

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



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# Sample invitations to provider (no NPI)

## CPSEPortal Invitation

You have been invited to be associated with **HIGHER LEARNING, LLC** as a service provider user in the CPSEPortal system. Please confirm your details below, select a username and password and then you may log in to the system. If any of your details are incorrect, please let the agency know and they will re-invite you.

### Name Confirmation - Confirm this information is correct.

First Name      Last Name  
**Mary**            **Smith**

### Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.

NPI                      **NO NPI SPECIFIED**       I confirm that I have no NPI.  
Profession            **SPED - Special Education Teacher ( )**  
NYS License Number  
Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP)

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

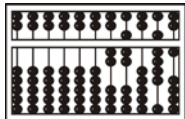
Email

### User Account Information

Username

Password                      Confirm Password  
        

Accept Invitation



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# Sample invitations to provider (already uses CPSEPortal)

## CPSEPortal Invitation

You have been invited to be associated with **WHOLE CHILD PSYCHOLOGICAL SERVICES, PC** as a service provider user in the CPSEPortal system. Please confirm your details below, select a username and password and then you may log in to the system. If any of your details are incorrect, please let the agency know and they will re-invite you.

### Name Confirmation - Confirm this information is correct.

First Name      Last Name  
Todd              Blowers

### Service Provider Information - Confirm this information is correct. Please enter your signature information at this time as well.

NPI                      1003000340  
Profession            SLP - Speech & Language Pathologist (058)  
NYS License Number 675432

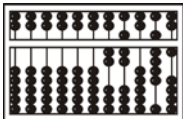
### Email Confirmation - Must match address invitation was sent to. You may update your email address after confirming your invitation, if necessary.

Email

### You appear to already be registered with CPSEPortal

By accepting this invitation, you are agreeing to associate yourself with this additional billing provider agency.

[Accept Invitation](#)



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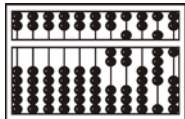
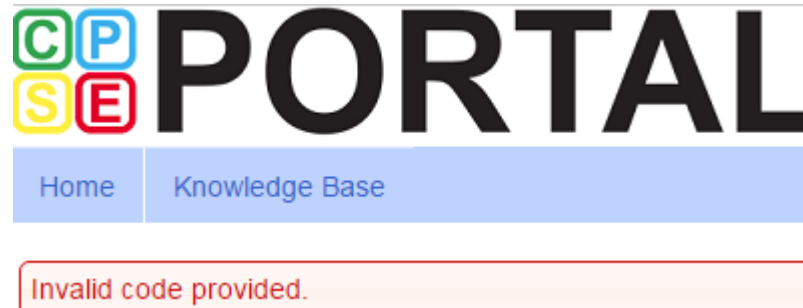
# Accepting invitations - Common errors

- ▶ You are using a machine where somebody is currently logged in to CPSE Portal. Have them log out and then you can try again.
- ▶ The agency has either deleted the invitation, or resent a newer one. Look for a more recent invitation and try that one.

## Server Error

### 404 - File or directory not found.

The resource you are looking for might have been removed, had its name changed, or is temporarily unavailable.

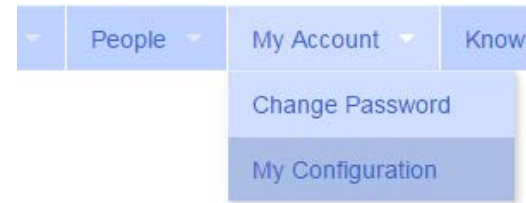


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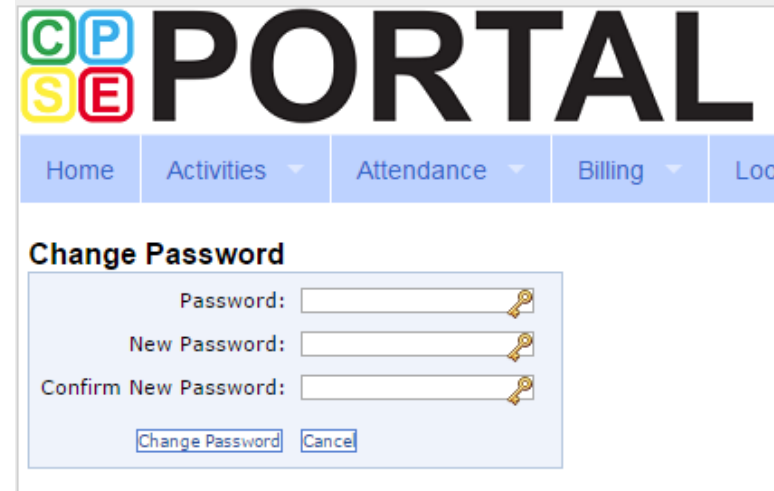
CPSE PORTAL

# Changing Your Password

- ▶ Navigate to the My Account->Change Password page



- ▶ Enter the your current password in the Password field
- ▶ Enter your New Password
- ▶ Re-enter your New Password to confirm it was entered correctly
- ▶ DO NOT share your password with anybody

A screenshot of the 'Change Password' form in the CPSE PORTAL. The form has a title 'Change Password' and three input fields: 'Password:', 'New Password:', and 'Confirm New Password:'. Each field has a key icon to its right. Below the fields are two buttons: 'Change Password' and 'Cancel'. The portal's logo 'CPSE PORTAL' and a navigation bar with 'Home', 'Activities', 'Attendance', 'Billing', and 'Look' are visible above the form.

# 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.

CPSE PORTAL (Login)

Home Knowledge Base

**Log In**

User Name:  \*

Password:  \*

Remember me next time.

Log In

[Forgot your password?](#)

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

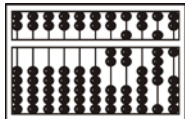
## Password Recovery

**Forgot Your Password?**

Enter your User Name to receive your password.

User Name:

Submit

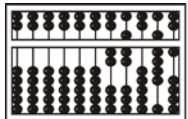


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# Common Password issues

- ▶ Using CAPS LOCK, having upper case / lowercase mismatch
- ▶ Users that have their browser save their password for them have problems when they change their password and the browser starts filling in bad information. Try clearing the information the browser is filling in
- ▶ Users change email addresses but don't update their profile.



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# Maintaining your profile



- ▶ Navigate the top menu to My Account-My Profile

### My Profile

Personal and Professional | User Information | Favorites

Information in CPSE Database

Last Name:   
 First Name:   
 NPI:   
 Signature, Title, and Credentials:

Information from NPPES NPI Registry

Click here for NPPES website | NPI:  | This NPI is for an

First Name:  | Organization Name:   
 Last Name:  | Mailing Address 1:   
 Credentials:  | Mailing Address 2:   
 City:  | State:  | Zip:

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	235Z00000X	Speech, Language and Hearing Service Providers	Speech-Language Pathologist		MI	ASHA01114077
N	235Z00000X	Speech, Language and Hearing Service Providers	Speech-Language Pathologist			

Licenses / Certifications / Professions

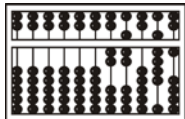
	Description	Credential Type	#	State	NY Profession Code	From	To	Active	
SLP	Speech & Language Pathologist	License	675432	NY	058			<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>

# Profile - Personal and Professional (Name)

- ▶ Can edit First and Last Name
- ▶ Need to contact us to correct NPI
- ▶ Signature, Title and Credentials are what will be recorded when you digitally sign. It should match exactly to how you sign with pen on paper when you sign professionally.

Information in CPSE Database

Last Name	<input type="text" value="Blowers"/>
First Name	<input type="text" value="Todd"/>
NPI	<input type="text" value="1003000340"/>
Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP)	<input type="text" value="Todd Blowers, CCC-SLP"/>





# Profile -> Licenses, Certifications

- ▶ To add your license, click add and complete the fields and click save
- ▶ Fields
  - ▶ Profession - Choose from list
  - ▶ Credential Type - Professions that are licensed through NYS Office Of The Professions (OT, PT, SLP, LPN, LCSW, etc.), should indicate **License**. All others (teachers, school psychologist, etc.) choose **Certificate**.
  - ▶ License Number - Only needed for licensed professionals that are licensed through NYS Office Of The Professions. Needs to be exactly 6 digits
  - ▶ Issuing State
  - ▶ Effective and Expiration Dates are for Licensed professionals and can be found on NYS Office Of The Professions website <http://www.op.nysed.gov/opsearches.htm>



**Add License / Certification / Profession**

Profession: OT - Occupational Therapist (Registered) (063)

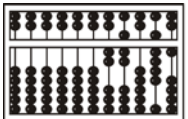
Credential Type: License

License Number: 003241

Issuing State: New York

Effective Date: 07/22/2010 Expiration Date: 08/31/2017

Save



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# Professions-Editing License/Certification

- ▶ Click the Edit Button on the license list

**Licenses / Certifications / Professions**

	Description	Credential Type	#	State	NY Profession Code	From	To	Active	
SLP	Speech & Language Pathologist	License	675432	NY	058			<input checked="" type="checkbox"/>	<a href="#">Edit</a>

[Add](#)

- ▶ Modify the information and click Save

**Edit License / Certification / Profession** [X]

Profession:

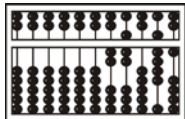
Credential Type:

License Number:

Issuing State:

Effective Date:  Expiration Date:

[Save](#)



# Professions - NPI Registry

- ▶ It is for informational purpose only
- ▶ Comes from National NPI Registry (<https://npiregistry.cms.hhs.gov/>). We don't control it, we can only display it
- ▶ If information is incorrect, you should contact NPPES to correct

## Information from NPPES NPI Registry

[Click here for NPPES website](#)

NPI

This NPI is for an

First Name

Organization Name

Mailing Address 1

Last Name

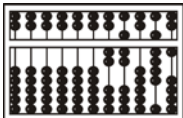
Credentials

Mailing Address 2

City

State  Zip

Primary	Taxonomy	Type	Classification	Specialization	State	License
Y	235Z00000X	Speech, Language and Hearing Service Providers	Speech-Language Pathologist		MI	ASHA01114077
N	235Z00000X	Speech, Language and Hearing Service Providers	Speech-Language Pathologist			



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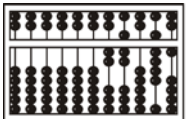
# User Information

- ▶ You can edit your name and email address

**My Profile**

Personal and Professional   User Information   Fav

Username	<input type="text" value="tblowers"/>
Last Name	<input type="text" value="Blowers"/>
First Name	<input type="text" value="Todd"/>
Email	<input type="text" value="tfragment@gmail.com"/>



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# Favorites

- ▶ Favorites are used to make data entry easier
- ▶ You can create a short list of the handful of CPT Codes and ICD Codes that you use frequently.
- ▶ When choosing CPT Codes & ICD Codes, you can choose from your list of favorites rather than the full list

## My Profile

Personal and Professional   User Information   **Favorites** ♥

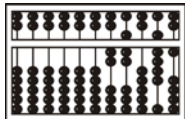
### Favorite ICD Codes

ICD Code	Version	
F82	10	Remove
F84.0	10	Remove

### Favorite CPT Codes

CPT Code	
92507	Remove
92508	Remove

Version



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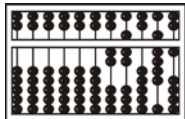
**CP**  
**SE** PORTAL

# Caseload

- ▶ For Agency Providers, your caseload is assigned by your agency
- ▶ For Independent Providers, your caseload is created by the County
- ▶ If a child or enrollment is missing from your caseload, we can't add it. You need to contact your agency or the County.
- ▶ You can create a temporary placeholder child or enrollment to use while waiting for data from the County.

# Child vs Enrollment

- ▶ A child is the person. Name, DOB, etc.
- ▶ The enrollment is the particular service that child is receiving
  - ▶ From Date / To Date
  - ▶ Service Type (OT, PT, ST, etc.) & Individual vs. Group
  - ▶ Frequency (2x30)

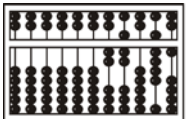


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# Unmatched Children and Enrollments

- ▶ Typically, all information about a child and the services they are receiving are entered by the County and uploaded into CPSE Portal
- ▶ However, an agency can create temporary child and enrollment records
- ▶ These are created when the County is delayed in entering data.
- ▶ The agency can create these records so that attendance and other information can be recorded even though the County has not entered the official information
- ▶ Once the County uploads the official information, the agency can “match” the temporary records to the County created record. When they do that, any data entered for the temporary record is moved to the County created one and then the temporary one is deleted.
- ▶ In CPSE Portal, these temporary / placeholder entries are referred to as “UnMatched”



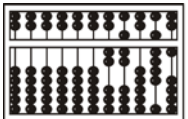
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# Enrollment & ESID

- ▶ The enrollment should correspond to a unique approved service on the IEP. Separate enrollments for
  - ▶ Different service types (OT vs PT vs ST)
  - ▶ Different frequencies (1x30 vs 1x45 vs 2x30) (if the CPSE alters the IEP and changes the frequency during the year, a new enrollment should be created)
  - ▶ Individual vs Group (if the CPSE determine a child should receive some individual and some group of the same service type, they should be separate enrollments)
- ▶ Each County created enrollment has a unique identifier called an Electronic Service Identifier or ESID for short. This is how we reference enrollments
- ▶ Unmatched enrollments do not have an ESID



# My Caseload

[Home](#) | 
 [Activities](#) | 
 [Attendance](#) | 
 [Caseload Maintenance](#) | 
 [Lookup](#)

**My Caseload**

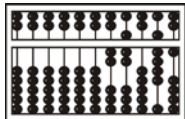
2015 - 2016 Winter |

- My Caseload
- Unmatched Children

- ▶ Using the top menu, navigate to Caseload Maintenance->My Caseload
- ▶ Use the dropdown and search to load the data for different school year sessions (winter means Sep-Jun)
- ▶ Status Column is either blank, "Unmatched", or "Rescinded"

2015 - 2016 Winter |

Status	ESID	Last Name	First Name	County	Provider	District	Enrollment Type	RS Type	From Date	To Date	Frequency	Individual Or Group	
	RS1516W0080738	BURCH	BRANDEN	ERIE	HIGHER LEARNING, LLC	Hamburg	RS	ST	9/1/2015	12/31/2015	2x30	I	Attendances
	RS1516W0082617	BURCH	BRANDEN	ERIE	HIGHER LEARNING, LLC	Hamburg	RS	ST	1/4/2016	4/20/2016	1x30	I	Attendances
	RS1516W0079839	CRAIN	TRACY	ERIE	HIGHER LEARNING, LLC	Hamburg	RS	ST	9/1/2015	6/30/2016	3x30	I	Attendances
	RS1516W0079750	DELONG	MAGDALENA	ERIE	HIGHER LEARNING, LLC	Hamburg	RS	ST	9/1/2015	6/30/2016	3x30	I	Attendances



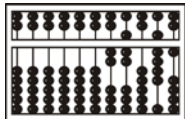
# My Caseload Attendance List

- ▶ For any enrollment on the Caseload list, click the [attendance](#) link column to view all the attendances recorded

## Attendance List

**Child Last Name** BURCH    **Child First Name** BRANDEN    **Electronic Service ID** RS1516W0080738    **Enrollment Type** RS    **RS Type** ST  
**County** ERIE    **Provider** HIGHER LEARNING, LLC    **District** Hamburg

Service Date	Time In	Time Out	# Sessions	Minutes Per Session	Service Provider	Setting	Individual Or Group	Signed Date	Co-Signed Date	Voucher #
9/29/2015	11:00 AM	11:30 AM	1.00	30	CECILA CUELLAR	Home	I	10/2/2015	10/2/2015	RS151028105015
10/1/2015	12:05 PM	12:35 PM	1.00	30	CECILA CUELLAR	Home	I	10/2/2015	10/2/2015	RS151209034428
10/6/2015	11:45 AM	12:15 PM	1.00	30	CECILA CUELLAR	Home	I	10/10/2015	10/10/2015	RS151209034428
10/8/2015	12:15 PM	12:45 PM	1.00	30	CECILA CUELLAR	Home	I	10/10/2015	10/10/2015	RS151209034428
10/13/2015	11:40 AM	12:10 PM	1.00	30	CECILA CUELLAR	Home	I	11/2/2015	11/2/2015	RS151209034428
10/15/2015	12:05 PM	12:35 PM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
10/20/2015	11:15 AM	11:45 AM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
10/22/2015	11:10 AM	11:40 AM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
10/27/2015	11:35 AM	12:05 PM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
10/29/2015	12:05 PM	12:35 PM	1.00	30	CECILA CUELLAR	Home	I	11/3/2015	11/3/2015	RS151209034428
11/3/2015	11:35 AM	12:05 PM	1.00	30	CECILA CUELLAR	Home	I	12/3/2015	12/3/2015	RS151223092631
11/5/2015	12:15 PM	12:45 PM	1.00	30	CECILA CUELLAR	Home	I	12/3/2015	12/3/2015	RS151223092631



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# Defaults

- ▶ A new feature is being added. It should be in by June 15<sup>th</sup>.
- ▶ It allows you to preset certain fields for an enrollment, that will likely be the same for each attendance. This will allow the system to prefill these for you, so you don't need to enter them each attendance.
- ▶ A new column will appear on the Caseload list for "defaults" that will open this

**Enrollment Info**

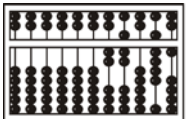
**Child Name:** Doe, John      **Electronic Service ID:** CPSECBRS0000002220      **Enrollment Type:** CBRS      **RS Type:** ST  
**County:** NASSAU      **Provider:** BELLMORE UFSD      **District:** OCEANSIDE UFSD

**For each new attendance use these default values**

Bill each entry as  30 minute session for a total duration of 30 minutes.

Service Setting       Location

CPT Code	Units		ICD Code	ICD Version	
<input type="text" value="92507"/>	<input type="text" value="1"/>	<input type="button" value="Add"/>	<input type="text" value="F82"/>	<input type="text" value="10"/>	<input type="button" value="Add"/>

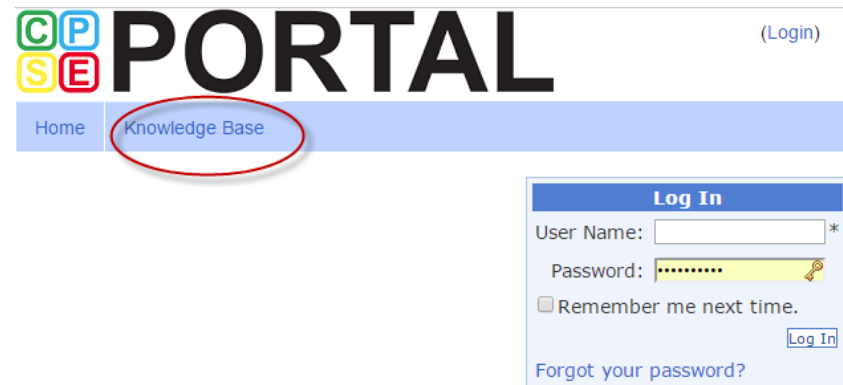


# Who to contact when

- ▶ Forgot your password?
  - ▶ Nobody, use the forgot password link on login screen
- ▶ Forgot your username
  - ▶ Your agency. If you are an Independent Provider, email [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
- ▶ An enrollment does not appear on your caseload
  - ▶ Either your agency or the County
- ▶ The Caseload information is incorrect
  - ▶ Either your agency or the County

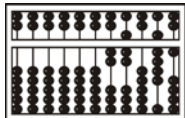
# Additional Information

- ▶ Email [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
- ▶ CPSE Portal support site <http://support.cpseportal.com>
  - ▶ Knowledge Base Articles
- ▶ Knowledge Base Menu from [www.CPSEPortal.com](http://www.CPSEPortal.com)



The screenshot displays the CPSE Portal website interface. At the top left, the logo consists of the letters 'C', 'P', 'S', and 'E' in colored boxes (green, blue, yellow, red) followed by the word 'PORTAL' in large black text. To the right of the logo is a '(Login)' link. Below the logo is a navigation bar with two items: 'Home' and 'Knowledge Base'. The 'Knowledge Base' item is highlighted with a red oval. In the bottom right corner, there is a 'Log In' form with the following fields and options:

- Log In** (header)
- User Name:  \*
- Password:  (with a key icon for password visibility)
- Remember me next time.
- 
- Forgot your password? (link)



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