

THERAPISTS

CREATING DEFAULTS FOR CASELOAD – Go to *Caseload Maintenance* -> *My Caseload*:

Therapists should create defaults for their session notes that will populate onto each note when created. These defaults can include:

- Service Setting
- Location
- Default CPT Code(s)
- Default ICD 10 Code(s)

At the end of each child's enrollment, click the "Defaults" button.

My Caseload

Filter By: Provider: [] Session: 2021 - 2022 Winter [v] Search []

Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned	Defaults
<input type="checkbox"/>	RS2122W0016895	BOYKIN	MATTIE	SCHENECTADY	[]	Schenectady	RS	01/20/22	06/24/22	ST 2x30 Individual	Attendances	Defaults
<input type="checkbox"/>	RS2122W0016896	BOYKIN	MATTIE	SCHENECTADY	[]	Schenectady	RS	01/20/22	06/24/22	ST1 1x30 Group	Attendances	Defaults
<input type="checkbox"/>	RS2122W0016596	BROUSSARD	DENVER	SCHENECTADY	[]	Schenectady	RS	09/07/21	01/04/22	ST 2x30 Individual	Attendances	Defaults
<input type="checkbox"/>	RS2122W0016597	BROUSSARD	DENVER	SCHENECTADY	[]	Schenectady	RS	09/07/21	01/04/22	ST1 1x30 Group	Attendances	Defaults

Now enter the Service Setting, Location, Default CPT Code for New Attendance, Default ICD 10 Code for New Attendance, and click "SAVE".

Enrollment Defaults

Enrollment Info

Child Name: BOYKIN, MATTIE Electronic Service ID: RS2122W0016895 Enrollment Type: RS RS Type: ST
County: SCHENECTADY Provider: [] District: Schenectady
Service Nickname: []
Enrollment Notes: []

For each new attendance use these default values

Bill each entry as 1 [] 30 minute session(s) for a total duration of 30 minutes

Service Setting: [Preschool] Location: [Little Red Schoolhouse, Hurley, NY]

Default CPT Code for new attendance

CPT Code	Description	Units	
92507	TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/OR AUDITORY PROCESSING DISORDER, INDIVIDUAL	1	Delete
[]	[]	[]	Add

Default ICD10 Code for new attendance

ICD 10 Code	Description	
F80.2	Mixed receptive-expressive language disorder	Delete
[]	[]	Add

Save []

Now when you go to your **Weekly Attendance** calendar and create your session note, all of those defaults will populate onto your new note. At any time, you can change your defaults on the note.

New Session for Jun 10, 2022

Time In: [09:00] [AM] Time Out: [09:30] [AM]

Bill this session as: [1.00] x30 minute session(s)
 Co-Visit with Supervisor

Setting: [Preschool] Location: [Little Red Schoolhouse, Hurley, NY]

Child: [BOYKIN, MATTIE 2x30 - ST - I 01/20/22 - 05/24/22]

Entry Type: [Provided Treatment Session]

Diagnosis Code(s): [F80.2]

CPT Codes: [92507] TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/OR AUDITORY PROCESSING DISORDER, INDIVIDUAL [1] Units

Does Not Meet Medicaid Requirements

Progress: No Progress Limited Progress Progress

Session Notes: []

save [] cancel []

SIGNING ATTENDANCE / REVIEW AND SIGN:

- Go to *Attendance -> Digital Signature -> Review and Sign Attendance*.
- The next screen will show your profile and any unsigned attendances with problems.
 - Your profile information should have all green checkmarks. If not, then make corrections before trying to sign attendances. The screen shot below shows that this therapist is missing her PIN.
 - Any attendances with errors will show up under the “Audit” tab.

Profile

First Name: KRISTEN Last Name: HOFFMAN NPI: 1508012717
Betty Gebauer Speech Pathologist, CCC-SLP

Signing As: [Green Checkmark]

Credentials: [Green Checkmark]

Status	Profession Code	Description	Credential Type	#	State	From	To
[Green Checkmark]	SLP	Licensed Speech & Language Pathologist	License	008342	NY	12/20/1994	4/30/2024

Missing Attestations: [No Missing Attestations]

PIN Created: [Red X]

Unsigned Attendances

School Year Session: (School Year Session) Apply Filter

Status	Child	Date of Service	Time In	Time Out	
[Red X]	HESTER, DEWITT	1/11/2022	09:40	10:10	Edit
[Yellow Warning]	PERSON, LIBERTY	6/18/2020	01:00	01:30	Edit

- Within the unsigned attendances, there will be icons listed under the “Audit” tab in the “Status” column. The Audit tab will show all errors and warnings.

[Green Checkmark] A green check means there are no errors

[Yellow Exclamation Point] A yellow exclamation point is a warning and will not prevent signing.

[Red X] A red "X" means there is an error that will prevent signing.

YELLOW WARNINGS. All warnings should be checked and not just by-passed.

- Click on the yellow yield sign with exclamation point to see what the warning is.
 - In the screen shot below, the warning is for “Exceeds Weekly Frequency for Enrollment”. This warning was for a make-up.
 - Click the “Edit” to make sure that you have chosen make-up session for this note. If not, make the change to the note now. You can now by-pass this warning.

School Year Session: (School Year Session) Apply Filter

Audit By Week By Enrollment

Status	Child	Date of Service	Time In	Time Out	
[Red X]	HESTER, DEWITT	1/11/2022	09:40	10:10	Edit
[Yellow Warning]	PERSON, LIBERTY	6/18/2020	01:00	01:30	Edit
[Yellow Warning]	RHODES, BOBBIE	1/18/2022	11:35	12:05	Edit
[Yellow Warning]	RHODES, BOBBIE	1/20/2022	11:30	12:00	Edit
[Yellow Warning]	RHODES, BOBBIE	1/21/2022	09:40	10:10	Edit

Issues Found With Attendance:

Issue Type	Description	Data Causing Issue
WARNING	Exceeds Weekly Frequency for Enrollment	Enrollment Frequency: 2x30

Ok

RED ERRORS. All errors must be corrected or attendance cannot be signed.

- Click on the red X to see what the error is.
 - In the screen shot below, the error is “Attendance Group Size Differs From the Expected Size of the CPT Code Listed”.
 - The screen shot shows the CPT Code used is 92507 which is for an individual session, but the group size was for 2.
 - Click the “Edit” to correct the session note, and change the CPT Code to a group CPT Code.

The screenshot shows the 'Unsigned Attendances' interface. A table lists attendance records with columns for Status, Child, Date of Service, Time In, and Time Out. The first record for DEWITT has a red X status and an 'Edit' button. A red arrow points from this 'Edit' button to a modal window titled 'Issues Found With Attendance:'. The modal contains a table with the following data:

Issue Type	Description	Data Causing Issue
ERROR	Attendance group size differs from the expected size of the CPT code listed (Marked as Meets Medicaid)	CPT Code: 92507 Expected Group Size: 1 Actual Group Size: 2

- **Review and sign “By Week” tab:**
 - Under the “By Week” tab, the attendances are listed by date.
 - Click on the “Review and Sign” week that you want to sign. Now you can toggle by each day of the week.
 - If your note is not correct or you want to make a change, you can “Edit” your note at this time.

The screenshot shows the 'Profile' section for KRISTEN HOFFMAN (NPI: 1508012717). It includes fields for 'Signing As' (Betty Gebauer Speech Pathologist, CCC-SLP) and 'Credentials' (SLP, Licensed Speech & Language Pathologist, License # 008342, NY, 12/20/1994 to 4/30/2024). Below this is the 'Unsigned Attendances' section with the 'By Week' tab selected. A table lists weeks with columns for Start Date, End Date, Number Of Unsigned Attendances, and Navigation. The 'Navigation' column contains 'Review And Sign' buttons for each week.

Start Date	End Date	Number Of Unsigned Attendances	Navigation
10/27/2019	11/02/2019	1	Review And Sign
06/14/2020	06/20/2020	1	Review And Sign
01/02/2022	01/08/2022	28	Review And Sign
01/09/2022	01/15/2022	34	Review And Sign
01/16/2022	01/22/2022	30	Review And Sign

Unsigned Attendances

Showing Attendances for the week of: 10/27/2019 - 11/2/2019 Sign ←

Sunday (0)	Monday (1)	Tuesday (2)	Wednesday (3)	Thursday (4)	Friday (5)	Saturday (6)							
Status	Child Name	ESD	Service Type	Service Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes
<input type="checkbox"/>		BENTON, JERROD	RS1920W0022957	ST	10/28/19	08:00 AM	08:30 AM	30	1.00	30	92007 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed.
<input type="checkbox"/>		CHERRY, YONG	RS1920W0014784	ST	10/28/19	09:30 AM	09:30 AM	30	1.00	30	92007 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed.
<input type="checkbox"/>		WINTERS, LEANDRA	RS1920W0014352	ST	10/28/19	09:45 AM	10:15 AM	30	1.00	30	92007 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed.
<input type="checkbox"/>		DAVILA, FOSTER	RS1920W0014739	ST	10/28/19	10:35 AM	11:05 AM	30	1.00	30	92007 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed.
<input type="checkbox"/>		DAKES, CHERYL	RS1920W0022741	ST	10/28/19	11:30 AM	12:00 PM	30	1.00	30	92007 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed.
<input type="checkbox"/>		NORWOOD, ROSSANA	RS1920W0022744	ST	10/28/19	12:15 PM	12:45 PM	30	1.00	30	92007 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed.
<input type="checkbox"/>		KRAUSE, EVON	RS1920W0014555	ST1	10/28/19	12:50 PM	01:20 PM	30	1.00	30	92007 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed.
<input type="checkbox"/>		SALDANA, DOWN	RS1920W0014569	ST	10/28/19	01:20 PM	01:50 PM	30	1.00	30	92007 (x1)	F80.2	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed.
<input type="checkbox"/>		HONG, IRA	RS1920W0022745	ST	10/28/19	01:55 PM	02:25 PM	30	1.00	30	92007 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed.
<input type="checkbox"/>		DAVILA, FOSTER	RS1920W0014800	COR	10/28/19	04:00 PM	04:30 PM	30	1.00	30	99066 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tristique molestie. Nunc dapibus pretium metus. sit amet finibus ipsum finibus sed. Edit

- Review and sign “By Enrollment” tab:

- Under the “By Enrollment” tab, the attendances are listed by the ESID #.
- Click on the “Review and Sign” of the ESID # that you want to sign.
- A calendar will also populate with the days that you have entered notes for.
- If your note is not correct or you want to make a change, you can “Edit” your note at this time.

Profile

First Name: KRISTEN Last Name: HOFFMAN NPI: 1508012717

Signing As: Betty Gebauer Speech Pathologist, CCC-SLP

Status	Profession Code	Description	Credential Type	#	State	From	To
	SLP	Licensed Speech & Language Pathologist	License	008342	NY	12/20/1994	4/30/2024

Missing Attestations: No Missing Attestations!

Pin Created:

Unsigned Attendances

School Year Session: (School Year Session) Apply Filter

Audit	By Week	By Enrollment			
Child	ESID	Service Month	Service	Number Of Unsigned Attendances	Navigation
BROUSSARD, DENVER	RS2122W0016884	January 2022	ST	2	Review And Sign
BROUSSARD, DENVER	RS2122W0016885	January 2022	ST1	4	Review And Sign
DAVILA, FOSTER	RS1920W0014800	October 2019	COR	1	Review And Sign
DELATORRE, CARINA	RS2122W0016811	January 2022	ST	2	Review And Sign
DUFF, TOD	RS2122W0016554	January 2022	ST	6	Review And Sign
ERWIN, DEANDRA	RS2122W0016902	January 2022	ST	2	Review And Sign
ERWIN, DEANDRA	RS2122W0016903	January 2022	ST1	2	Review And Sign
FOSTER, ERNEST	RS2122W0016162	January 2022	ST	2	Review And Sign
FOSTER, ERNEST	RS2122W0016888	January 2022	ST	1	Review And Sign
FOSTER, ERNEST	RS2122W0016889	January 2022	ST1	2	Review And Sign

Enrollment Info

Child Name: BROUSSARD, DENVER ESID: RS2122W0016884
 Service Type: Speech Therapy IND Frequency: 1x00
 Dates: 01/05/22 - 06/24/22 Status: OK

January 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Sign Attendance

Status	Service Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes	Edit
✓	01/10/22	11:15 AM	11:45 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	Edit
✓	01/18/22	09:30 AM	10:00 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	Edit

Best Practices for Signing Notes:

1. Sign your notes frequently!
2. Notes should be recorded and signed on the same day!
3. Do **NOT** wait to sign your notes until the end of the month.
 - a. There are too many entries to do a proper review.
 - b. It is too long past the activity to remember anything.

Un-signing Attendance / Making Corrections After Signed:

Go to *Attendance* -> *Digital Signature* -> *Unsign Attendance*.

- Use the Filter to search for dates, enrollment and county to find attendances.
 - Click “Retrieve”.
- Click the check box on rows needed to unsign, and click “Unsign Attendance”.
- Enter PIN.
- Go to your *Weekly Calendar*, find date of attendance, and make correction on note.
- You will now need to re-sign your attendances again for that child/date.

From Date: 07/01/2021 To Date: 6/8/2022 Enrollment: Not Selected County: Provider: Retrieve Unsign Attendance

<input type="checkbox"/>	Last Name	First Name	Service Date	Start Time	End Time	CPT Codes	Notes
<input type="checkbox"/>			2/01/2022	10:00 AM	10:30 AM	97530	Devin engaged in fine motor activities. He was positioned to work on the floor to engage core working in tall kneel and quad coordination. He was building his own structures not replicating designs or patterns. He was more accepting of therapist work.
<input type="checkbox"/>			2/01/2022	10:30 AM	11:00 AM	97530	Teo transitioned easily to the motor room. He engaged in a sensorimotor obstacle course incorporating climbing and sliding, table for a sensory experience while using magnet blocks working on hand strength and bilateral hand coordination. Teo en

Cannot Un-sign Attendances:

If you go to *Attendance* -> *Digital Signature* -> *Unsign Attendance*, and your attendances will not populate after you filter:

- Contact your agency.
 - The child may still be on a voucher. You cannot unsign any attendances if the child is on a voucher. The agency will need to remove the child from the voucher.
- Double check your filter dates to ensure that you have gone back far enough for the date to populate.
- Check your *Weekly Calendar* to see if the child's attendances were never signed. If you can open the note and make changes then the attendances were never signed.

Knowledge Base articles:

Un-signing Attendance - <http://support.cpseportal.com/kb/a33/unsigned-attendance.aspx>

Therapist Cannot Unsign a Session - <http://support.cpseportal.com/kb/a405/therapist-cannot-unsigned-a-session.aspx?KBSearchID=23237>