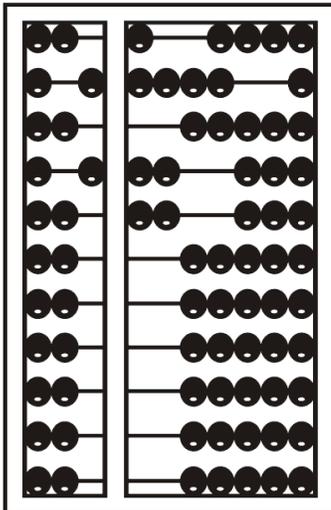


JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants



Welcome to Full-Service  
Medicaid with  
James McGuinness &  
Associates, Inc.  
(Jefferson County)

# INTRODUCTIONS

Who will you be working with at McGuinness?

***Deborah Frank, McGuinness Medicaid Specialist***

- *Kelly Knowles, McGuinness Medicaid Team*
- *Danielle Croskey, McGuinness Medicaid Team*

# UPCOMING CHANGES FOR JEFFERSON COUNTY

- ❑ Jefferson County will be using a new software system for the 2024-25 school year.
- ❑ The new system is the **CPSE Portal** and will be effective beginning with service dates of **7/1/24**.
- ❑ The CPSE Portal will assist you with tasks that you have previously done on paper such as:
  - *Entering attendances and session notes*
  - *Assigning children to classrooms,*
  - *Assigning therapists to children, and*
  - *Billing*
- ❑ The **CPSE Portal** will work in conjunction with billing Medicaid for health-related services.

# EMAIL ANNOUNCEMENT

- James McGuinness and Associates will also be working with Jefferson County as their Medicaid contractor/claiming agent.
- All providers should have received an email from the County explaining that McGuinness will be handling Medicaid claiming/billing for Jefferson County for service dates beginning **July 1, 2024**.
- Along with the email you should have also received a ***New Implementation Guide for Full-Service Medicaid***, which delineates the CPSE Portal Medicaid requirements and expectations for the Jefferson County Provider.

# WHAT IS THE PURPOSE OF THIS WEBINAR?

- ❑ This is not a training; it is a high-level overview of what lies ahead.
- ❑ We are looking to:
  - *Provide you with an introduction to the upcoming expectations/requirements*
  - *Share a timeline for the implementation process*
  - *Let you know what you can do to ensure a smooth transition*

# MEDICAID REQUIREMENTS

- ❑ **IEPs Requirements**
- ❑ **Prescriptions Requirements**
  - *OT Prescriptions*
  - *Prescription Templates*
- ❑ **SLP Requirements**
  - *OPRA Enrollment*
  - *Digital Speech Recommendations*
  - *Speech Prescriptions from Community Practitioners*
- ❑ **Credential Verifications & Approvals**
- ❑ **Center-Based Related Service Vouchers**
- ❑ **Non-Compliant & Outstanding Medicaid Documentation**
- ❑ **Billing Edits**

# WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

## *For IEPs*

### ☐ County Expectations for **IEPs**:

- The County is expecting providers to upload IEPs (entire IEP) to the Portal for **ALL** children – **Not just Medicaid children.**
- Agency Billing Admins and Agency Service Providers will be expected to **upload** IEPs that cover service dates beginning **July 1, 2024** as well as any subsequent IEPs for the **2024-25** school year.
- An upcoming webinar on **How to Upload Medicaid Documentation (5/30/24)** will *explain in detail how to upload an IEP.*

# WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

## *For Prescriptions/Digital Orders*

### ☐ **County Expectations for Prescriptions:**

- The County is expecting providers to upload Prescriptions to the Portal for **ALL** children – **Not just Medicaid children.**
- Agency Billing Admins and Agency Service Providers will be expected to **review** and **upload** prescriptions that cover service dates beginning **July 1, 2024** as well as any new prescriptions (new children/changes in service) for the **2024-25** school year.
- **Upcoming webinars for prescriptions will take place as follows:**
  - ✓ An upcoming webinar on **How to Upload Medicaid Documentation (5/30/24)** will explain in detail how to upload a hardcopy prescription.
  - ✓ An upcoming webinar on **Medicaid-Compliant Written Orders (4/16, 4/17, 4/19)** will explain in detail how to review prescriptions for Medicaid compliance.

# WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

## *For Prescriptions/Digital Orders*

### □ County Expectations for **Prescriptions** (Continued)

- Effective **July 1, 2024**, the county is expecting SLPs to use the **Digital Speech Recommendation** feature in the Portal (or EnterClaims) for all Medicaid enrollments including **new children** and/or **changes in service** (*instead of uploading a paper prescription*).
- Effective **July 1, 2024** billing providers will not be able to submit attendances in the Portal for enrollments that do not have an uploaded prescription or digital speech recommendation attached to the child's Portal enrollment.
- A webinar training has been scheduled to walk through the **Digital Speech Recommendation** process on the following dates: (**6/12, 6/14, 8/7, 8/9**).
- A webinar training on **EnterClaims Digital Orders** is scheduled for **6/11/24** at 2:30.

# WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

## *For Prescriptions/Digital Orders*

### □ **County Expectations for Prescriptions** (Continued)

- Effective **April 1, 2024**, Agencies and Agency Service Providers will use the prescription templates in the Portal Knowledge Base for OT, PT and Psychological Counseling Services (for **7/1/24** service dates).
- You will see two prescription templates in the Portal:
  - 1) A **Multi-Discipline Template** (for School Year & Calendar Year), and
  - 2) An **OT/PT Template** (for School Year & Calendar Year)
- The Portal prescription templates have space in the heading for customization to include a logo and/or agency information (name/address/phone) *providing the customization does not cause the prescription to generate a second page.*

# PORTAL RX TEMPLATES (School Year)

This space can be used to customize the Rx.  
Add Logo and/or name & address here.

## PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided as specified in the Individualized Education Program (IEP) designed by the Committee. (Check one or both as required.)  Evaluation  Services

Student Name	DOB
District	County
Agency	

(Name of Agency, Center-based Program or Individual Provider / Phone)

Reason for Rx:  Annual Review Meeting  Change in Service  Transfer Meeting  Re-Eval Meeting  New Referral

(REQUIRED) Term of Service: School Year July 1, 20 to June 30, 20 (Frequency, Duration & Class Ratio as per the IEP)

(Please type in the last two digits of the school year. Format YYYY.)

Evaluation/Service	(REQUIRED) ICD CODE for EVALUATION(S)	(REQUIRED) ICD CODE for SERVICE(S) *	Medical Diagnosis/Purpose of Treatment
Audiological			
Occupational Therapy			
Physical Therapy			
Speech			
Psychological/Psychological Counseling			
Skilled Nursing (Requires a Physician's Order)			

The most specific ICD code is required for each evaluation/service.  
Medicaid requires that a written referral be in place prior to the initiation of evaluations/services.

\* An order/referral for services must be completed for each IEP period.

A new order/referral must be completed whenever reviews conducted during an IEP period results in a change in service (i.e., frequency/duration/class size).

Signature	Date Signed
(Original Signature Required – Stamps Not Permitted)	(Required)
Print Name	Title

Address (REQUIRED) - (Stamp Accepted)	(REQUIRED) License #
	(REQUIRED) NPI #
	Medicaid #
Phone (REQUIRED) :	Fax #

(Signature of NYS licensed and registered physician, a physician or a licensed nurse practitioner acting within the scope of practice (for psychological counseling services this also includes an appropriate school official and for speech therapy services, a speech-language pathologist who has seen the child.)

This space can be used to customize the Rx.  
Add Logo and/or name & address here.

## PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided as specified in the Individualized Education Program (IEP) designed by the Committee. (Check one or both as required.)  Evaluation  Services

Student Name	DOB
District	County
Agency	

(Agency, Center-based Program or Individual Provider)/Phone

(Required) Term of Service: School Year July 1, 20 to June 30, 20

(Required) Check Appropriate Service(s) / Evaluation(s)

OT – Service  PT – Service  OT - Evaluation  PT – Evaluation

(Required) ICD CODE / MEDICAL DIAGNOSIS-PURPOSE OF TREATMENT

(Check)	ICD Code	Description	(Frequency, Duration & Class Ratio as per the IEP)
<input type="checkbox"/>	F82	Coordination Disorder	
<input type="checkbox"/>	F84.0	Autism	
<input type="checkbox"/>	R62.50	Unspecified lack of expected normal physiological development in childhood	
<input type="checkbox"/>	R26.89	Abnormality of Gait: Ataxic, paralytic, spastic, staggering	
<input type="checkbox"/>	R27.8	Lack of Coordination: Ataxia, not otherwise specified; muscular incoordination	
<input type="checkbox"/>	Other		

(Please Specify)

The most specific ICD code is required for each evaluation/service.  
Medicaid requires that a written referral be in place prior to the initiation of evaluations/services.

\* An order/referral for services must be completed for each IEP period.  
A new order/referral must be completed whenever reviews conducted during an IEP period results in a change in service (i.e., frequency/duration/ratio).

Signature	Date Signed
(Original Signature Required – Stamps Not Permitted)	(Required)
Print Name	Title

Address (Required) - (Stamp Accepted)	(Required) License #
	(Required) NPI #
	Medicaid #
Phone (Required)	Fax #

(Signature of NYS licensed and registered physician, a physician or a licensed nurse practitioner acting within the scope of practice (for psychological counseling services this also includes an appropriate school official and for speech therapy services, a speech-language pathologist who has seen the child.)

The Term of Service dates for school year templates show a school year – 7/1 to 6/30.

Only the year needs to be filled in.

OT/PT

Multi-Discipline

# PORTAL RX TEMPLATES (Calendar Year)

This space can be used to customize the Rx.  
Add Logo and/or name & address here.

## PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided as specified in the Individualized Education Program (IEP) designed by the Committee. (Check one or both as required.)  Evaluation  Services

Student Name	DOB
District	County
Agency	

(Name of Agency, Center-based Program or Individual Provider / Phone)

(Check One)  
Reason for Rx:  Annual Review Meeting  Change in Service  Transfer Meeting  Re-Eval Meeting  New Referral

(REQUIRED) Term of Service:	From	To	(Frequency, Duration as per the IEP)
<i>(Please type in the last two digits of the school year. Format YYYY.)</i>			
Evaluation/Service	(REQUIRED) ICD CODE for EVALUATION(S)	(REQUIRED) ICD CODE for SERVICE(S) *	Medical Diagnosis/Purpose of Treatment
Audiological			
Occupational Therapy			
Physical Therapy			
Speech			
Psychological/Psychological Counseling			
Skilled Nursing (Requires a Physician's Order)			

*The most specific ICD code is required for each evaluation/service.  
Medicaid requires that a written referral be in place prior to the initiation of evaluations/services.*

\* An order/referral for services must be completed for each IEP period.  
A new order/referral must be completed whenever reviews conducted during an IEP period results in a change in service (i.e., frequency/duration/class size).

Signature	Date Signed
(Original Signature Required – Stamps Not Permitted)	(Required)
Print Name	Title

Address (REQUIRED) - (Stamp Accepted)	(REQUIRED) License #
	(REQUIRED) NPI #
	Medicaid #
Phone (REQUIRED) :	Fax #

*(Signature of NYS licensed and registered physician, a physician or a licensed nurse practitioner acting within the scope of practice (for psychological counseling services this also includes an appropriate school official and for speech therapy services, a speech-language pathologist who has seen the child.)*

This space can be used to customize the Rx.  
Add Logo and/or name & address here.

## PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided as specified in the Individualized Education Program (IEP) designed by the Committee. (Check one or both as required.)  Evaluation  Services

Student Name	DOB
District	County
Agency	

(Agency, Center-based Program or Individual Provider)/Phone

(Required) Term of Service:	From	To	(Frequency, Duration as per the IEP)
--------------------------------	------	----	--------------------------------------

(Required) Check Appropriate Service(s) / Evaluation(s)

OT – Service  PT – Service  OT - Evaluation  PT – Evaluation

(Required) (Check)	ICD Code	ICD CODE / MEDICAL DIAGNOSIS-PURPOSE OF TREATMENT Description	(Frequency, Duration & Class Ratio as per the IEP)
<input type="checkbox"/>	F82	Coordination Disorder	
<input type="checkbox"/>	F84.0	Autism	
<input type="checkbox"/>	R62.50	Unspecified lack of expected normal physiological development in childhood	
<input type="checkbox"/>	R26.89	Abnormality of Gait: Ataxic, paralytic, spastic, staggering	
<input type="checkbox"/>	R27.8	Lack of Coordination: Ataxia, not otherwise specified; muscular incoordination	
<input type="checkbox"/>	Other		

(Please Specify)

*The most specific ICD code is required for each evaluation/service.  
Medicaid requires that a written referral be in place prior to the initiation of evaluations/services.*

\* An order/referral for services must be completed for each IEP period.  
A new order/referral must be completed whenever reviews conducted during an IEP period results in a change in service (i.e., frequency/duration/ratio).

Signature	Date Signed
(Original Signature Required – Stamps Not Permitted)	(Required)
Print Name	Title

Address (Required) - (Stamp Accepted)	(Required) License #
	(Required) NPI #
	Medicaid #
Phone (Required)	Fax #

*(Signature of NYS licensed and registered physician, a physician or a licensed nurse practitioner acting within the scope of practice (for psychological counseling services this also includes an appropriate school official and for speech therapy services, a speech-language pathologist who has seen the child.)*

The Term of Service dates for a Calendar Year template must coincide with the IEP Service Dates.

The entire date needs to be filled in.

OT/PT  
Multi-Discipline

# WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

## *For OT Prescriptions*

- ❑ Prior to February 3, 2012 Occupational Therapists were required to have a written order to provide treatment.
- ❑ The amendment to Education Law §7901 on February 3, 2012 states that occupational therapists can perform services without a prescription if the service is ***not specific to “restorative function.”*** However...
- ❑ If the county has contract language for the provider that indicates that the provider must cooperate in the processing of Medicaid claims, the county can insist that the provider obtain a written order for ***Medicaid*** purposes. In the absence of a written order, or until a Medicaid written order is obtained, treatment can occur.

# WHAT WILL JEFFERSON COUNTY EXPECT FROM SLP PROVIDERS?

## *OPRA Enrollment for SLPs*

- ❑ In order for Medicaid to pay on a claim, the ordering/referring provider must be enrolled with Medicaid as an **Ordering, Prescribing, Referring, Attending (OPRA) provider.**
- ❑ Jefferson County will be requiring SLPs (who are ordering, prescribing, referring) to be OPRA enrolled so the services they provide will be Medicaid reimbursable. There is no cost to enroll.
- ❑ If you are an SLP that is not enrolled in OPRA, the link below will give you helpful information about the enrollment process. McGuinness and eMedNY can also assist you with this process.
- ❑ Link: <http://support.cpseportal.com/kb/a255/opra-enrollment-information-website.aspx>

# WHAT WILL JEFFERSON COUNTY EXPECT FROM SLP PROVIDERS?

## *Digital Speech Recommendations For SLPs*

### SLPs will be required to...

- Create a Digital Speech Recommendation** in the Portal (or EnterClaims) for **all** children with **7/1/24** service dates (or later – instead of uploading a paper prescription).
- Create a digital Speech Recommendation in the Portal (or EnterClaims) **in addition to any prescriptions uploaded from community practitioners.**
- Essentially, the SLP will create a digital recommendation **for ALL speech children.**

????  
....

Are there any questions about the  
new prescriptions/digital  
recommendation requirements?

## WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

### *Comply with Requests for Non-compliant or Missing Medicaid Documentation*

- ❑ **Non-Compliant Medicaid Prescriptions:** If an uploaded prescription does not meet Medicaid requirements, you will receive notification from McGuinness regarding what is required to ensure Medicaid claiming.
- ❑ **Outstanding Documentation:** Several times throughout the school year you will be contacted by McGuinness with a request for ***missing*** documentation (that is required for Medicaid claiming). Please respond to this notification as soon as possible to ensure that Medicaid claims are processed within the limited claiming window.

# WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

## *Verify Your Credentials (In The Portal)*

- ❑ Jefferson County is requiring all licensed providers to **verify** their credentials through the CPSE Portal. This process is simply verifying that a therapist's Name, NPI and license number are correct.
- ❑ Billing Providers will only be able to submit attendances for therapists that have verified credentials.
- ❑ An upcoming webinar on **Credential Verification (5/9/24)** will explain in detail how to verify credentials. *Please verify your credentials as soon as possible after the webinar.*
- ❑ All licensed therapists **must** have an NPI number to bill through the Portal – even if they work under the direction of a supervising clinician. There is no cost to apply for an NPI number and usually takes 7-10 days. Applicants can use the following links to apply:
  - <https://www.cms.gov/Medicare/CMS-Forms/CMS-Forms/downloads/cms10114.pdf>
  - <https://www.webpt.com/blog/do-i-need-a-new-npi-and-other-npi-questions/>

# CPSE PORTAL VERIFICATION SCREEN

## Verify Your Credentials (In The Portal)

### CPSE PORTAL CREDENTIAL VERIFICATION – PREVIEW

From the Therapist's Home Page

Home Activities Attendance Caseload Maintenance Lookup Documents Reports My Account

User Profile [Hide](#)

Username: kthayer  
First Name: Kelly  
Last Name: Thayer  
Email: kthayerachievements@gmail.com.jmcguinness.com  
[Edit User Account](#)

My Professional Profile [Hide](#)

Name: ADELAIDE CARVER  
NPI: 1811511298 (KELLY THAYER)

My License(s)

Profession	License	Original Date Of Licensure	Registered Through Date	License Lookup	Verification Status	Verify
Licensed Speech & Language Pathologist	030860	07/02/2021	06/30/2024	Lookup	REQUIRES VERIFICATION	<a href="#">Verify</a>

My other credential(s)

Profession	Credential	Date of Issue	Valid Through
Clinical Fellowship Year			

My signature  
*Kelly Thayer, M.S.Ed., CCC-SLP*  
Kelly Thayer, M.S.Ed., CCC-SLP  
[Edit My Profile](#)

# WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

## Verify Your Credentials (In The Portal)

After clicking the “Verify” Link

Click the checkbox to Verify

License Information from SED

NPI Information from the NPI Registry

**Credential Verification**

Verification

*This credential has been verified on 8/14/2022 by Vassel, Anne*

First Name	Jenny	<input type="checkbox"/>	Verify
Last Name	Somekh	<input type="checkbox"/>	Verify
Signature	Jenny Somekh OTR/L	<input type="checkbox"/>	Verify
Profession	Licensed Occupational Therapist	<input type="checkbox"/>	Verify
License No	014182	<input type="checkbox"/>	Verify
Date Of Licensure	6/22/2006	<input type="checkbox"/>	Verify
Registered Through	11/30/2023	<input type="checkbox"/>	Verify
NPI	1801029632	<input type="checkbox"/>	Verify

**License Information from NYSED Office of the Professions**

*According to data retrieved on: 3/10/2023 3:04:20 PM*

<b>Name</b>	SOMEKH JENNY
<b>Address</b>	ROSLYN HEIGHTS NY
<b>Profession</b>	Occupational Therapy (063)
<b>License Number</b>	014182
<b>Date Of Licensure</b>	June 22, 2006
<b>Registered through Date</b>	November 30, 2023
<b>Status</b>	REGISTERED

**NPPES**

[Click here for NPPES website](#)

NPI  This NPI is for an

First Name

Last Name

Credentials

# WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

## *Credential Verification Approvals*

- ❑ In addition to verifying the therapist's credentials in the Portal (or EnterClaims), the Credential Verification ***must be approved*** by the county (or McGuinness on behalf of the county) before billing can move forward.
- ❑ Therapists that have unverified credentials or have verified credentials that have not been approved by the county (or McGuinness) will not be able to submit billing through the Portal.
- ❑ McGuinness has the ability to assign "conditional approvals" that will allow the agency a certain period of time to submit billing while the specific verification issue is addressed.
- ❑ If a billing provider receives an error message that credentials need to be approved, please email [Medicaid@cpseportal.com](mailto:Medicaid@cpseportal.com) requesting credential approval.

## WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

### *Submit CBRS Billing at the Same Time as the CB Billing*

- ❑ The County is expecting Center-Based providers to submit the Portal Center-Based Related Service (CBRS) Voucher at the same time that the Portal Center-Based voucher is submitted.
- ❑ If the county receives the tuition voucher **without** the CBRS voucher, payment for the tuition voucher may be withheld until the CBRS Voucher has been submitted.
- ❑ McGuinness will notify providers who have not submitted CBRS billing.

# WHAT WILL JEFFERSON COUNTY EXPECT FROM PROVIDERS?

## *Supervision – (UDO)*

- ❑ Certain service providers require supervision (PTAs, OTAs, Speech Teachers, CFYs)
- ❑ Providers will be expected to create ***Pre-License Plans*** in the Portal for CFYs and other Limited Permit holders.
- ❑ Providers will be expected to create ***Supervision/Enrollment Plans*** in the Portal for all Supervision Enrollments
- ❑ Providers will be expected to enter the ***Face-to-Face Meeting Date*** in the Portal in order to submit billing to the County for all supervision enrollments.
- ❑ Upload the UDO Audit documentation (Child Log and Accessibility Form) into the Portal.

*A webinar training has been scheduled to walk through the Supervision process on the following dates: (6/4, 6/6, 7/11, 8/14, 8/16).*

# TO SUMMARIZE

## *Providers will be expected to...*

- ❑ **Upload** Medicaid documentation (IEPs & Rxs) for **all** children (*not just Medicaid children*) for service dates beginning **7/1/24**. A prescription must be uploaded before you will be able to submit billing in the Portal.
- ❑ Use the **McGuinness prescription templates** for all prescriptions (except Speech) beginning **4/1/24** (for 7/1/24 billing dates).
- ❑ Comply with requests for **non-compliant and/or missing Medicaid documentation**.
- ❑ **Verify credentials** in the Portal. Billing providers will not be able to submit attendances to the county for non-verified or non-approved providers.
- ❑ Submit **Center-Based Related Services billing** at the same time as the Center-Based billing.
- ❑ Create **Pre-License/Supervision Plans** in the Portal and enter the **Face-to-Face Observation Date**. (Required for billing)
- ❑ **SLP Requirements:**
  - SLPs are required to be **enrolled in OPRA** (Ordering, Prescribing, Referring, Attending).
  - SLPs are required to complete a *digital speech recommendation* in the Portal for **ALL CHILDREN** beginning **7/1/24**.
  - SLPs are required to complete a *digital speech recommendation* in the Portal in addition to any prescriptions uploaded from medical practices.

# 2024 Full-Service Medicaid TIMELINE

## Jefferson County

- ❑ **7/1/24 (Service Dates)** - Effective Date for Full-Service Medicaid billing w/ McGuinness
- ❑ **4/1/24** – New Prescription Templates for OT/PT/Psychological Counseling
- ❑ **7/1/24** – Digital Speech Recommendations for all Speech Enrollments (instead of paper)
- ❑ **TRAINING**
  - 1) **4/16, 4/17 & 4/19** – **Medicaid-Compliant Written Orders Training**  
*This is a very informative Medicaid compliance webinar that everyone should attend.*
  - 2) **4/23, 4/24 & 4/26** – **Medicaid-Compliant Session Notes Training**  
*This is a very informative Medicaid compliance webinar that everyone should attend.*
  - 3) **5/30** – **Uploading Medicaid Documentation (IEPs & Rxs)**
  - 4) **6/12, 6/14, 8/7 & 8/9** – **Digital Speech Recommendation Training – (for SLPs)**
  - 5) **6/4, 6/6, 7/11, 8/14 & 8/16** – **Supervision Training**  
*(Providers will be expected to watch this webinar prior to receiving Portal Support)*
- ❑ **July 2024** – **First Medicaid Billing Cycle\***

*\*Prior to billing, make sure credentials have been verified, a prescription/digital order has been uploaded/created, Supervision Requirements have been entered and unmatched enrollments have been matched.*

# FSM & CPSE PORTAL TRAINING TIMELINE

JEFFERSON COUNTY CPSE PORTAL & FULL-SERVICE MEDICAID IMPLEMENTATION TRAINING TIMELINE					
3/1/2024			7/1/2024		
CPSE PORTAL TRAININGS			FULL-SERVICE MEDICAID TRAININGS		
Date	Time(s)	Presentation	Date	Time(s)	Presentation
5/7/2024	10:00 & 3:30	CPSE Portal Kick-Off	3/20/2024	10:00 & 2:00	FSM Kick-Off
5/9/2024	10:00 & 3:30	Credential Verification	4/16/2024	10:00	Med-Compliant Written Orders
5/14/2024	2:00	Agency Case Mgt	4/17/2023	2:00	Med-Compliant Written Orders
5/15/2024	10:00	Agency Case Mgt	4/19/2024	3:30	Med-Compliant Written Orders
5/15/2024	2:00	Agency CB Case Mgt	4/23/2024	10:00	Med-Compliant Session Notes
5/16/2024	10:00	Agency CB Case Mgt	4/24/2024	2:00	Med-Compliant Session Notes
5/21/2024	10:00 & 4:00	Independent Case Mgt	4/26/2024	3:30	Med-Compliant Session Notes
5/23/2024	10:00 & 4:00	Service Provider Case Mgt	5/30/2024	10:00 & 2:00	Uploading Medicaid Docs
6/3/2024	10:00	Portal Session Notes	6/4/2024	10:00	Supervision (UDO)
6/5/2024	4:00	Portal Session Notes	6/6/2024	2:00	Supervision (UDO)
7/31/2024	10:00 & 4:00	Billing - Independents	7/11/2024	10:00 & 2:00	Supervision (UDO)
8/1/2024	10:00 & 2:00	Billing in Portal	8/14/2024	2:00	Supervision (UDO)
8/2/2024	10:00 & 2:00	Billing from an Outside System	8/16/2024	3:30	Supervision (UDO)
9/30/2024	4:00	Billing - Independents	6/12/2024	2:00	Digital Recommendations
10/1/2024	10:00	Billing in Portal	6/14/2024	3:30	Digital Recommendations
10/1/2024	2:00	Billing from an Outside System	8/7/2024	2:00	Digital Recommendations
			8/9/2024	3:30	Digital Recommendations

# CPSE PORTAL KNOWLEDGE BASE

## *for Medicaid*

- ❑ You can find tutorials, articles and webinars in the CPSE Portal Knowledge Base.
- ❑ We have put all the Knowledge Base Links that are related to Medicaid into a table for quick reference, which is included within the ***New Implementation Guide***.
- ❑ The table of Knowledge Base Medicaid links can also be accessed using this link:  
<http://support.cpseportal.com/kb/a231/medicaid-knowledge-base-links.aspx>

# CPSE PORTAL KNOWLEDGE BASE

## for Medicaid - Continued

### CPSE PORTAL MEDICAID KNOWLEDGE BASE

Listed below is a list of CPSE Portal Knowledge Base Articles and Webinars that will assist providers/agencies with Medicaid responsibilities. The articles/webinars are categorized as noted in the table below. Links for each of these articles follow this table.

Knowledge Base Articles/Webinars	Description
Children & Enrollments	Therapists and agencies will use these articles to set up and manage temporary enrollments that are created by the therapist or agency. These temporary enrollments will be subsequently matched by the agency so that children can be serviced contemporaneously prior to the creation of the "official" enrollment.
Credential Verification & How to Apply for an NPI #.	In order to be compliant with Medicaid requirements, we need to make sure that therapists are up to date with their credentials. These articles will assist therapists and agencies as well as Portal users without a CPSE Portal login to manage their license and NPI information. Credentials must be verified before billing can be submitted in the Portal.
Lookup	Articles under Lookup will give you information regarding children, enrollments, CPT/ICD, etc.
Medicaid New Implementation Guide (for providers)	This guide will help providers understand the requirements of Full-Service Medicaid with McGuinness.
Medicaid Compliance	We have put together many articles and webinars to help agencies and providers with Medicaid compliance. You will find the following items under this category: <ul style="list-style-type: none"> <li>a webinar and PowerPoint Presentation on Medicaid-Compliant Written Orders,</li> <li>a prescription checklist detailing the valid verses invalid way to complete a Medicaid prescription,</li> <li>a blank Medicaid-compliant prescription template and sample prescription template, and,</li> <li>links to the Medicaid Provider Policy &amp; Billing Handbook and the Medicaid Questions and Answers.</li> </ul> <p>These resources will be very helpful with your Medicaid-related responsibilities.</p>
Medicaid Reports (for Documentation)	These reports will help you to determine the documentation that is "missing" (consents, prescriptions, IEPs) and as a result preventing Medicaid claiming.
Prescriptions	There are many articles related to prescriptions. You will find the following under this category: <ul style="list-style-type: none"> <li>"How To" Articles,</li> <li>Articles that will help you with Medicaid compliance as it relates to prescriptions/verifications and,</li> <li>Troubleshooting</li> </ul>
Uploading Documentation	These articles will assist you with the processes required for uploading Consent Forms, IEPs and Prescriptions.
User Information	These articles will help you with getting started in the Portal. <ul style="list-style-type: none"> <li>Choosing a PIN #,</li> <li>Entering your signature and credential information, and,</li> <li>Initial set-up</li> </ul>
Webinars	These links will bring you to various webinars.

### CPSE PORTAL MEDICAID KNOWLEDGE BASE LINKS

<b>New Implementation Guide for McGuinness Full-Service Medicaid (for Providers)</b> <a href="http://support.cpseportal.com/kb/a232/mcguinness-full-service-medicaid-new-implementation-guide-for-providers.aspx">http://support.cpseportal.com/kb/a232/mcguinness-full-service-medicaid-new-implementation-guide-for-providers.aspx</a>	
<b>How to Submit a Ticket to the CPSE Portal:</b> <a href="http://support.cpseportal.com/kb/a188/how-to-submit-a-ticket-to-the-cpse-portal.aspx">http://support.cpseportal.com/kb/a188/how-to-submit-a-ticket-to-the-cpse-portal.aspx</a>	
ARTICLE / TUTORIAL / WEBINAR	LINK
<b>CHILDREN &amp; ENROLLMENTS</b>	
Enrollments Added by County	<a href="http://support.cpseportal.com/kb/a182/enrollments-added-by-county-report.aspx">http://support.cpseportal.com/kb/a182/enrollments-added-by-county-report.aspx</a>
Entering Unmatched Children and Unmatched Enrollments	<a href="http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx">http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx</a>
Matching Unmatched Children and Enrollments	<a href="http://support.cpseportal.com/kb/a175/matching-unmatched-children-and-enrollments.aspx">http://support.cpseportal.com/kb/a175/matching-unmatched-children-and-enrollments.aspx</a>
View Unmatched Enrollments	<a href="http://support.cpseportal.com/kb/a184/view-unmatched-enrollments.aspx">http://support.cpseportal.com/kb/a184/view-unmatched-enrollments.aspx</a>
Editing an Unmatched Child	<a href="http://support.cpseportal.com/kb/a124/editing-an-unmatched-child.aspx">http://support.cpseportal.com/kb/a124/editing-an-unmatched-child.aspx</a>
<b>CREDENTIAL VERIFICATION</b>	
Credential Verification Webinar	<a href="http://support.cpseportal.com/kb/a166/credential-verification.aspx">http://support.cpseportal.com/kb/a166/credential-verification.aspx</a>
Credential Verification - Agencies	<a href="http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx">http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx</a>
Credential Verification - Providers	<a href="http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx">http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx</a>
Credential Verification - No Portal Login	<a href="http://support.cpseportal.com/kb/a151/credential-verification-no-cpse-portal-login.aspx">http://support.cpseportal.com/kb/a151/credential-verification-no-cpse-portal-login.aspx</a>
Service Provider Credential Verification Listing	<a href="http://support.cpseportal.com/kb/a224/credential-verification-listing-approval-listing-reports.aspx?KBSearchID=13730">http://support.cpseportal.com/kb/a224/credential-verification-listing-approval-listing-reports.aspx?KBSearchID=13730</a>
Website to Apply for an NPI Number	<a href="https://npes.cms.hhs.gov/NPES">https://npes.cms.hhs.gov/NPES</a>
<b>LOOK-UP</b>	
How to look up a child by ESID #	<a href="http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid.aspx">http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid.aspx</a>
<b>MEDICAID COMPLIANCE</b>	
Medicaid-Compliant Written Orders Webinar Recording	<a href="http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx">http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx</a>
Medicaid-Compliant Written Orders PowerPoint Presentation	<a href="http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx">http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx</a>
Medicaid-Compliant Written Orders Webinar Q & A	<a href="http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx">http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx</a>
Medicaid-Compliant Written Order Verification Checklist	<a href="http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx">http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx</a>
Medicaid-Compliant Written Order - Sample	<a href="http://support.cpseportal.com/kb/a174/medicaid-compliant-written-order-sample-template.aspx">http://support.cpseportal.com/kb/a174/medicaid-compliant-written-order-sample-template.aspx</a>
Medicaid-Compliant Written Order Blank Template	<a href="http://support.cpseportal.com/kb/a172/medicaid-compliant-prescription-template.aspx">http://support.cpseportal.com/kb/a172/medicaid-compliant-prescription-template.aspx</a>
Medicaid Provider Policy & Billing Handbook	<a href="http://www.oms.nyseg.gov/medicaid/handbook/sshap_handbook_9_march_21_2018_final.pdf">http://www.oms.nyseg.gov/medicaid/handbook/sshap_handbook_9_march_21_2018_final.pdf</a>
Medicaid Questions & Answers	<a href="http://www.oms.nyseg.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf">http://www.oms.nyseg.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf</a>
<b>MEDICAID REPORTS (FOR MISSING DOCUMENTATION)</b>	
Missing Documents Preventing Claiming	<a href="http://support.cpseportal.com/kb/a191/missing-documents-preventing-claiming-report.aspx">http://support.cpseportal.com/kb/a191/missing-documents-preventing-claiming-report.aspx</a>
Missing Parental Consents	<a href="http://support.cpseportal.com/kb/a99/missing-medicaid-parental-consents.aspx">http://support.cpseportal.com/kb/a99/missing-medicaid-parental-consents.aspx</a>
Missing IEPs	<a href="http://support.cpseportal.com/kb/a186/missing-ieps-report.aspx">http://support.cpseportal.com/kb/a186/missing-ieps-report.aspx</a>
Missing Prescriptions	<a href="http://support.cpseportal.com/kb/a187/missing-prescriptions-report.aspx">http://support.cpseportal.com/kb/a187/missing-prescriptions-report.aspx</a>
<b>PRESCRIPTIONS</b>	
How to Create a Digital Speech Recommendation (Entering Unmatched Children and Unmatched Enrollments may be required for this process.)	<a href="http://support.cpseportal.com/kb/a163/creating-a-digital-speech-recommendation.aspx">http://support.cpseportal.com/kb/a163/creating-a-digital-speech-recommendation.aspx</a>
Prescription Verification Checklist (for Medicaid)	<a href="http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx">http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx</a>
Prescription Requirements for Medicaid	<a href="http://support.cpseportal.com/kb/a173/prescription-requirements.aspx">http://support.cpseportal.com/kb/a173/prescription-requirements.aspx</a>
Uploading & Troubleshooting Prescription Documentation	<a href="http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=10123">http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=10123</a>

# MEDICAID SUPPORT ([Medicaid@CPSEPortal.com](mailto:Medicaid@CPSEPortal.com))

## **McGuinness should be the first point of Contact for...**

- Prescription Questions
- Medicaid Compliance Questions
- Medicaid Functions in Portal (such as the Supervision process)
- Uploading Medicaid documentation (such as prescriptions or IEPs)

If you need assistance, please contact [Medicaid@cpseportal.com](mailto:Medicaid@cpseportal.com). Someone from the McGuinness Medicaid Team will assist you.

Feel free to copy the county when you submit your questions/issues. McGuinness will **Reply to All** when we reply.

# Link to All Follow-up Webinars

**Link to Webinar Postings for all Presentations:**

<https://support.cpseportal.com/kb/c74/jefferson-county-full-service-medicaid.aspx>

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# QUESTIONS

# McGuinness Medicaid-in-Education Contact Information

**James McGuinness and Associates, Inc.**

**1482 Erie Boulevard**

**Schenectady, NY 12305**

**Phone: (518) 393-3635**

**Fax: (518) 393-9938**

**Deborah Frank**, McGuinness Medicaid Specialist – [dfrank@jmcguinness.com](mailto:dfrank@jmcguinness.com) – Extension #41

**Kelly Knowles**, McGuinness Medicaid Team – [kknowles@jmcguinness.com](mailto:kknowles@jmcguinness.com) – Extension #28

# Follow-up

- ❑ This presentation will be recorded and the PowerPoint presentation will be uploaded to the Portal Knowledge Base for future reference.
  - Search for help in our **Knowledge Base**: <http://support.cpseportal.com/Main/Default.aspx>
  - Email for **Medicaid Support**: [Medicaid@CPSEPortal.com](mailto:Medicaid@CPSEPortal.com)
  - **Questions/Guidance** regarding Medicaid compliance:  
Contact Deborah Frank – [dfrank@jmcguinness.com](mailto:dfrank@jmcguinness.com), 518-393-3635, Ext. #41
  
- ❑ The ***New Implementation Guide*** has a lot of the information presented during today's webinar.

## ❑ HELPFUL LINKS

CPSE Portal **Knowledge Base Links for Medicaid**

<http://support.cpseportal.com/kb/a231/medicaid-knowledge-base-links.aspx>