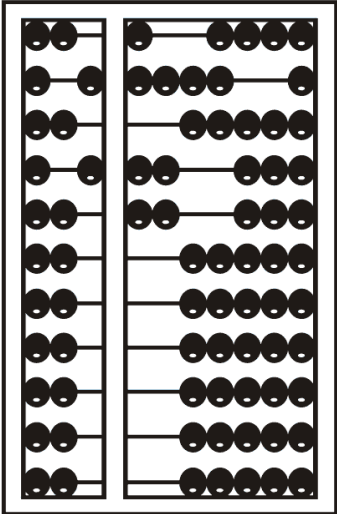


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



CPSE Portal Billing – Using an Outside System



Review of Import Person with License Template

Portal Profession Codes

- * The Portal Profession Codes must be entered on the template.
- * The list of Professional Codes 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”)

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



Review of Credential Verification


Review of Credential Verification

- * For most counties, only a licensed professional's credentials need to be verified.
- * This includes SLP, OT, OTA, PT, PTA, LMSW, LCSW, etc. They can be found on <http://www.op.nysed.gov/>.
- * Some counties require non-licensed professionals (teachers, school psychologists, etc.) to verify their credentials. Many non-licensed professionals do not have NPI numbers so it becomes only a name verification. Check with your county to see if non-licensed professionals need to verify their credentials.
- * Individuals that are not licensed, but can work under the direction / supervision of a licensed professional. These include CFY, Limited Permit OT, Limited Permit PT, TSHH, TSSLD.

Who Can Complete the Verification Process?

- * A licensed professional that does not have a login to CPSE Portal (because their agency uploads data from another system), can verify their own credentials using their NPI and license number.
- * An agency can verify the credentials of any service provider that works for them.

Credential Verification for Therapists Without a Login



The screenshot shows the CPSE Portal website. The header includes the CPSE logo (C in green, P in blue, S in yellow, E in red) and the word "PORTAL" in large black letters. To the right is the logo for JAMES McGUIN & ASSOCIATES Consultants, featuring a stylized abacus. Below the header, the page title is "Credential Verification for Therapists without a CPSE Portal login". Underneath, there is a sub-header "NPI and License" and a prompt "Please Enter your NPI and License". The form contains three input fields: "NPI" (text box), "Profession" (dropdown menu with "--Select Profession--"), and "License #" (text box). A "Proceed to Verification" button is located at the bottom of the form.

CPSE PORTAL

JAMES McGUIN & ASSOCIATES Consultants

Credential Verification for Therapists without a CPSE Portal login

NPI and License

Please Enter your NPI and License

NPI

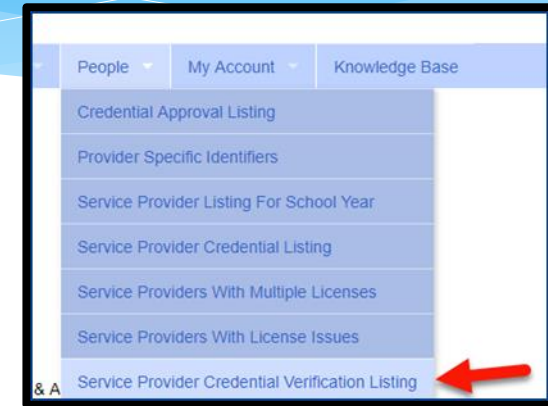
Profession

License #

<https://www.cpseportal.com/NonCPSEUserCredentialVerification/EnterCredentials.aspx>

Credential Verification by Agency Office Staff

- * Go to **People > Service Provider Credential Verification Listing**.
- * Click “Verify” for the therapist needing to be verified.



Filters

County: All Counties Provider: ACHIEVEMENTS Retrieve

Profession: All Professions Include Previously Verified

Person Name	NPI	Profession	Credential Type	Credential Number	From Date	To Date	Status	Verify	History
BEASLEY, MELIDA	1346571726	SLP	License	010753	11/12/1998	12/31/2020	REQUIRES VERIFICATION	Verify	History
Benner, MaryRose	1023261047	OT	License	009248	12/13/1999	12/31/2019	REQUIRES VERIFICATION	Verify	History
BLACKWELL, DOMINIQUE	1992939078	LCSW	License	080709	05/02/2013	02/28/2019	REQUIRES VERIFICATION	Verify	History
BRENNAN, MARISA	1528203916	OT	License	007750	10/22/1996	02/29/2020	REQUIRES VERIFICATION	Verify	History
Brezina, Elena	1003051277	SLP	License	009939	01/01/2017	02/01/2020	REQUIRES VERIFICATION	Verify	History
CARLSON, CARMEN	1811445802	OT	License	020866	08/25/2016	07/31/2019	REQUIRES VERIFICATION	Verify	History

Credential Verification by Agency Office Staff

- * The verification screen has three main sections:
 - * The list of information from the service providers profile (name, NPI, license, etc.) that needs to be verified and attested that it is correct (upper left)
 - * The information for their license as it appears on the NYS Office of the Professions website (right hand side)
 - * The information from the National NPI Registry for their NPI (bottom left)
- * Be sure to compare the two exactly, as you will be attesting that the information in the Portal is accurate.

The screenshot displays the 'Credential Verification' interface. It is divided into three main sections:

- Upper Left (Service Provider Profile):** A form with fields for First Name (Stephanie), Last Name (Matos), Signature (Stephanie Matos COTAL), Profession (Licensed Occupational Therapist Assistant), License No (008670), Date Of Licensure (6/10/2015), Registered Through (8/31/2024), and NPI (1275046849). Each field has a 'Verify' button. A button at the bottom says 'I attest the above information is accurate'.
- Bottom Left (NPPES):** A section for NPI verification with a link to the NPPES website, a field for NPI (1275046849) with a dropdown for 'Individual', and fields for First Name (STEPHANIE), Last Name (MATOS-O'CONNELL), and Credentials.
- Right Hand Side (NYS Office of the Professions):** A window titled 'License Information From NYS Office of the Professions' showing data retrieved on 8/6/2024 10:27:20 AM. It includes a table of license information and a button to 'Update Verification with SED Dates'.

The license information table is as follows:

Field	Value
Name	O'CONNELL STEPHANIE MARIE
Address	CATSKILL NY
Profession	Occupational Therapy Assistant (064)
License Number	008670
Date Of Licensure	June 10, 2015
Registered through Date	August 31, 2024
Status	REGISTERED

The NYS Office of the Professions window also shows a detailed view of the license information:

Field	Value
Address	CATSKILL NY
Profession	Licensed Occupational Therapist Assistant, Certified
License Number	008670
Date of Licensure	June 10, 2015
Additional Qualifications	
Status	REGISTERED
Registered through Date	08/24

Red arrows point from the 'Verify' buttons in the upper left section to the corresponding fields in the NYS Office of the Professions window, indicating the comparison process.

Credential Verification by Agency Office Staff

- * Once you have confirmed that all of the data is accurate and all of the “verify” boxes are checked, click “I attest.”
- * The prompt to enter your pin will then pop up. Your name and signature will auto-populate based upon your profile on CPSE Portal.
 - * Enter pin and select “I agree.”
- * You will then see the confirmation underneath the verification.

Enter PIN

By entering my pin number, I/We certify that my NPI and license information are both up to date and correctly entered into the CPSE Portal.

Name: Example Signature


Signing As: Example Signature

NPI:

Date: 6/29/2018

Pin: ****

I agree.

 Credential verification confirmed

Credential Verification by Agency Office Staff

- * If you get this message:

 Your profile does not have a signature. Please edit your profile and enter your signature.

- * This means, that you do not have your Signature Title and Credentials filled out. This does NOT have to do with the service provider you are verifying, but rather the agency admin.
- * You will need to go to My Profile and add this in.

My Profile

Personal and Professional | User Information | Favorites ♥

Information in CPSE Database

Last Name

First Name

NPI

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

Personal and Professional | User Information | Favorites ♥

Information in CPSE Database

Last Name

First Name

NPI

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



Schema Attendance File

What is an ESID

- * ESID is the abbreviation for Electronic Service ID number. It is the number that identifies the child and the child's particular enrollment in the Portal.
- * The CPSE Portal gives each County created enrollment a unique identifier called the ESID. This is how we reference enrollments.
- * In order to be in compliance with HIPAA you should reference all preschool children by their ESID #, not their name. If you need to contact the help desk, you should **ALWAYS** reference the child's ESID #, and **NOT** the child's name.

Schema Attendance File

- * A billing provider can create a schema file and upload it into the CPSE Portal instead of entering it directly.
- * Below is the Knowledge Base article containing the schema information needed:
 - * <http://support.cpseportal.com/kb/a67/schema-for-attendance-file-upload.aspx?KBSearchID=17037>

County Codes for Schema Attendance File

- * The Schema Attendance File will also need a County Code.
- * The full list of County Codes can be found at:
 - * <http://support.cpseportal.com/kb/a82/county-codes.aspx>

County Codes

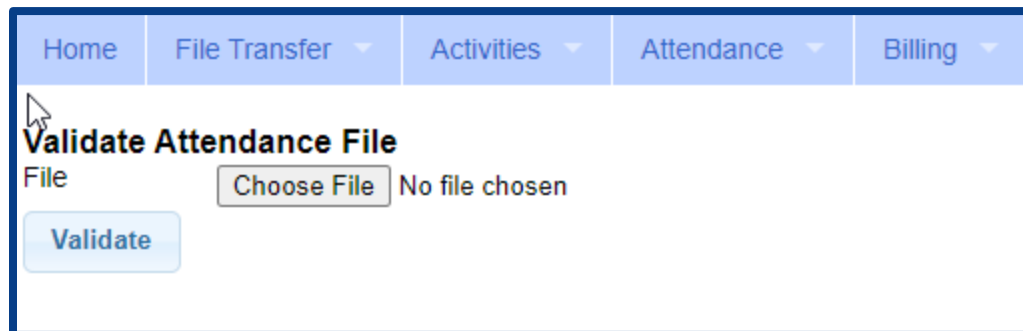
CPSEPortal > Attendance Upload

SED County Codes

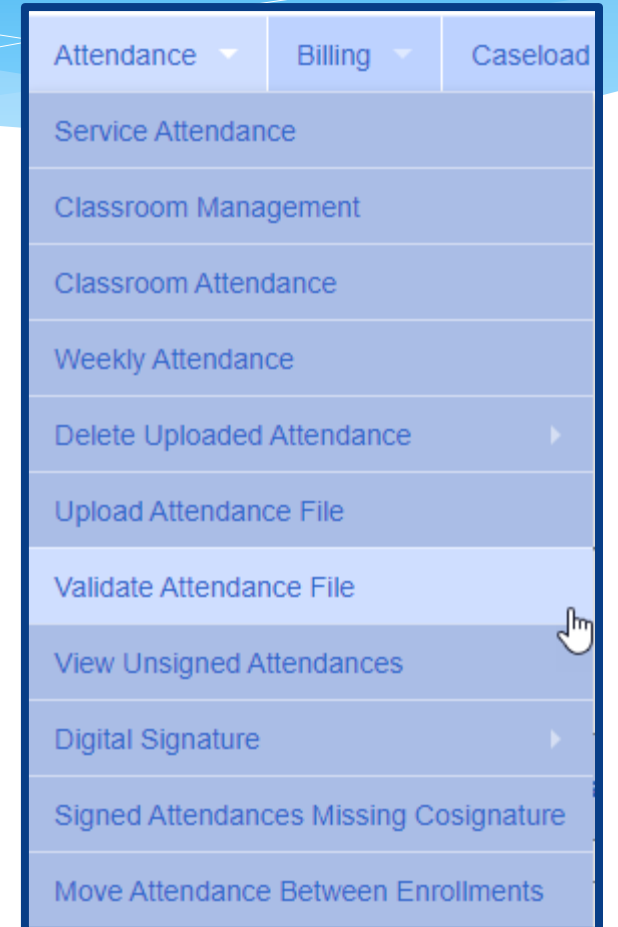
Code	County
01	ALBANY
02	ALLEGHANY
03	BROOME
04	CATTARAUGUS
05	CAYUGA
06	CHAUTAUQUA
07	CHEMUNG
08	CHENANGO
09	CLINTON
10	COLUMBIA
11	CORTLAND
12	DELAWARE
13	DUTCHESS
14	ERIE
15	ESSEX
16	FRANKLIN
17	FULTON
18	GENESEE
19	GREENE

Validate Attendance File

- * Go to **Attendance > Validate Attendance File**.
- * Click Choose File, and find your file.
- * Now click **Validate**.



The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'File Transfer', 'Activities', 'Attendance', and 'Billing'. Below the navigation bar, the page title is 'Validate Attendance File'. Underneath the title, there is a 'File' label, a 'Choose File' button, and the text 'No file chosen'. At the bottom of the form area, there is a 'Validate' button.



The screenshot shows a dropdown menu for the 'Attendance' tab. The menu items are: 'Service Attendance', 'Classroom Management', 'Classroom Attendance', 'Weekly Attendance', 'Delete Uploaded Attendance', 'Upload Attendance File', 'Validate Attendance File' (highlighted with a mouse cursor), 'View Unsigned Attendances', 'Digital Signature', 'Signed Attendances Missing Cosignature', and 'Move Attendance Between Enrollments'.



Common Validation Attendance Errors

Common Validation Attendance Errors

- * Service Provider does not exist in database:
 - * *The therapist is not in the Portal. Add therapist to the Portal.*



Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2324W0018394	12/14/2023	2290186248457108810	Service provider does not exist in database.	2001	Type:CompanyDefined / Value:

- * CoVisit therapist does not exist in database:
 - * *The CoVisiting therapist is not in the Portal. Add CoVisiting therapist to the Portal.*



Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	CoVisit therapist does not exist in database.	2002	Type:NPI / Value:1316460000

Common Validation Attendance Errors

- * There is more than one attendance with the same attendance ID:
 - * *Check ESID # listed to see if duplicate attendance exists.*

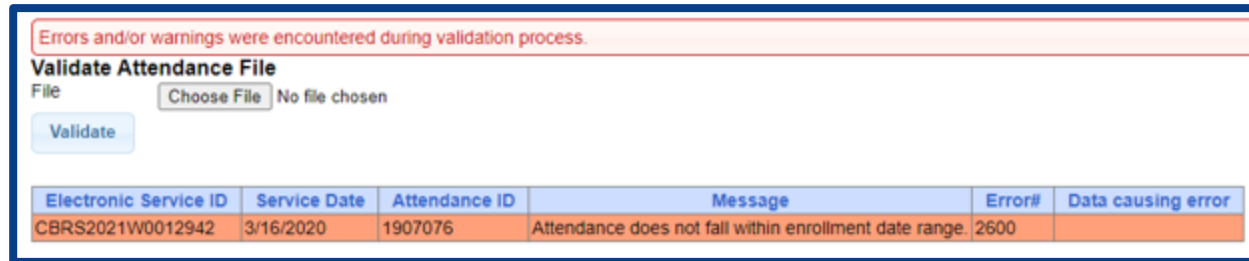
Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012397	3/16/2021	1906424	There is more than one attendance with the same attendance ID.	2100	1906424
CBRS2021W0011624	3/18/2021	1906424	There is more than one attendance with the same attendance ID.	2100	1906424

- * Electronic Service ID does not exist in CPSE Postal:
 - * *Check the Portal to see if the County has uploaded the child to the Portal. Also check to see if the ESID # of the child matches the County record.*

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W001283M	3/15/2021	1906424	Electronic Service ID does not exist in CPSEPortal.	2200	CBRS2021W001283M

Common Validation Attendance Errors

- * Attendance does not fall within enrollment date range:
 - * Attendance is outside of the enrollment dates. Check the attendance dates.



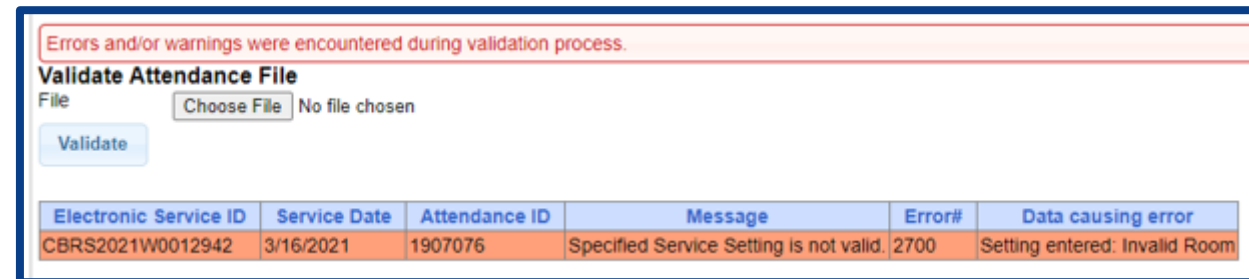
Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2020	1907076	Attendance does not fall within enrollment date range.	2600	

- * Specified Service Setting in not valid:
 - * Check the Service Setting of the attendance date listed. The Service Setting should match the IEP.



Errors and/or warnings were encountered during validation process.

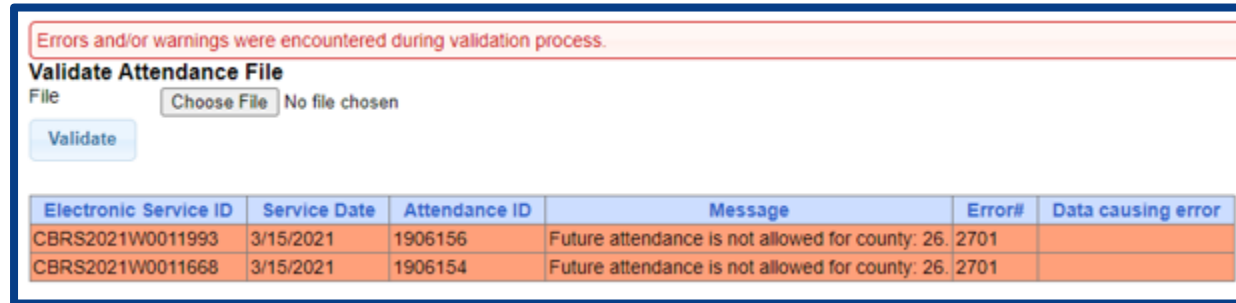
Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	Specified Service Setting is not valid.	2700	Setting entered: Invalid Room

Common Validation Attendance Errors

- * Future attendance is not allowed for County:
 - * Check attendance and remove future attendances listed.



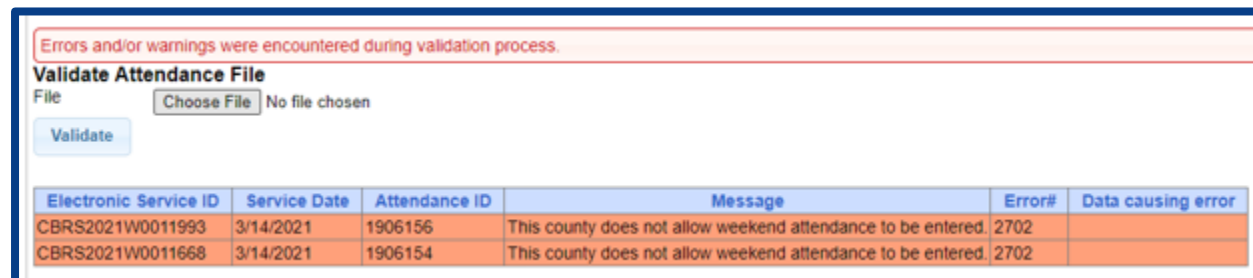
Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0011993	3/15/2021	1906156	Future attendance is not allowed for county: 26.	2701	
CBRS2021W0011668	3/15/2021	1906154	Future attendance is not allowed for county: 26.	2701	

- * This County does not allow weekend attendance to be entered:
 - * Check attendance and remove all attendances on weekend dates listed.



Errors and/or warnings were encountered during validation process.

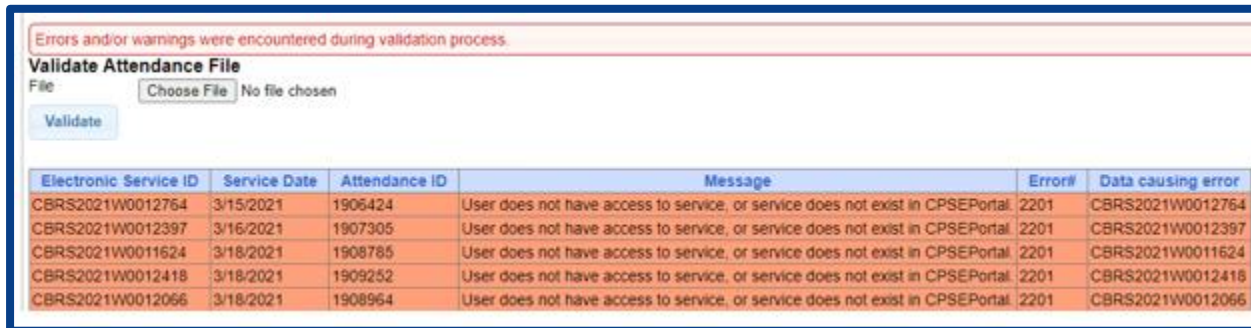
Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0011993	3/14/2021	1906156	This county does not allow weekend attendance to be entered.	2702	
CBRS2021W0011668	3/14/2021	1906154	This county does not allow weekend attendance to be entered.	2702	

Common Validation Attendance Errors

- * User does not have access to service or service does not exist in CPSE Portal:
 - * *Check Portal to ensure that the County has uploaded the service to the Portal.*



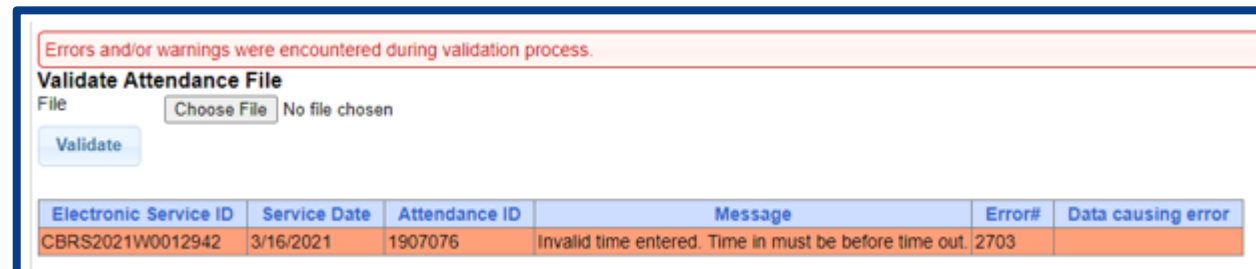
Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0012764
CBRS2021W0012397	3/16/2021	1907305	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0012397
CBRS2021W0011624	3/18/2021	1908785	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0011624
CBRS2021W0012418	3/18/2021	1909252	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0012418
CBRS2021W0012066	3/18/2021	1908964	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0012066

- * Invalid time entered. Time in must be before time out:
 - * *Correct “time in” on attendance.*



Errors and/or warnings were encountered during validation process.

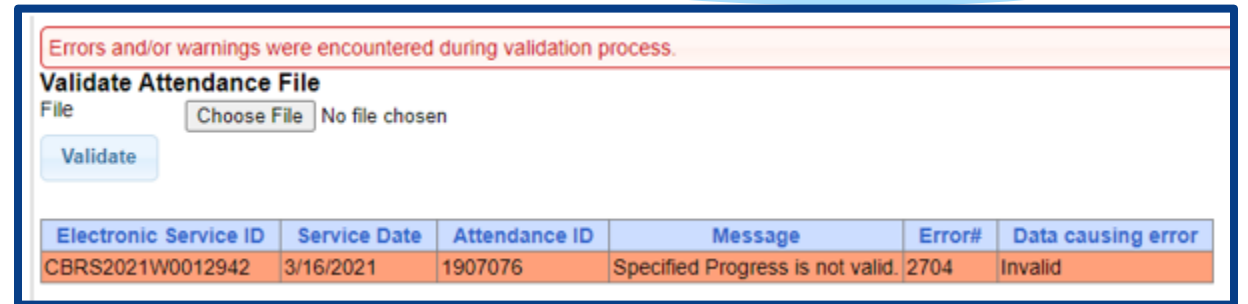
Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	Invalid time entered. Time in must be before time out.	2703	

Common Validation Attendance Errors

- * Specified Progress is not valid:
 - * *Check attendance and correct progress.*



Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	Specified Progress is not valid.	2704	Invalid

- * There is not a classroom entered for SED Program Code 9100 for ESID #:
 - * *Assign CB child to classroom in the Portal.*



Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CB2021W0047274	2/22/2021	1	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	
CB2021W0047274	2/23/2021	2	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	
CB2021W0047274	2/24/2021	3	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	
CB2021W0047274	2/25/2021	4	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	
CB2021W0047274	2/26/2021	5	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	

Common Validation Attendance Errors

- * There already exists a duplicate/overlapping attendance on 3/15/2021 for ESID #.....:
 - * Check Portal attendance for date given in error message. The attendance has already been uploaded and you are uploading a duplicate attendance for that day.

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File: No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	There already exists a duplicate/overlapping attendance on 3/15/2021 for Electronic Service ID CBRS2021W0012764	2311	

- * The file contains a duplicate/overlapping attendance on 3/16/2021 for ESID #.....:
 - * Check your file for ESID # and delete any duplicate attendance on the date given in error message.

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File: No file chosen

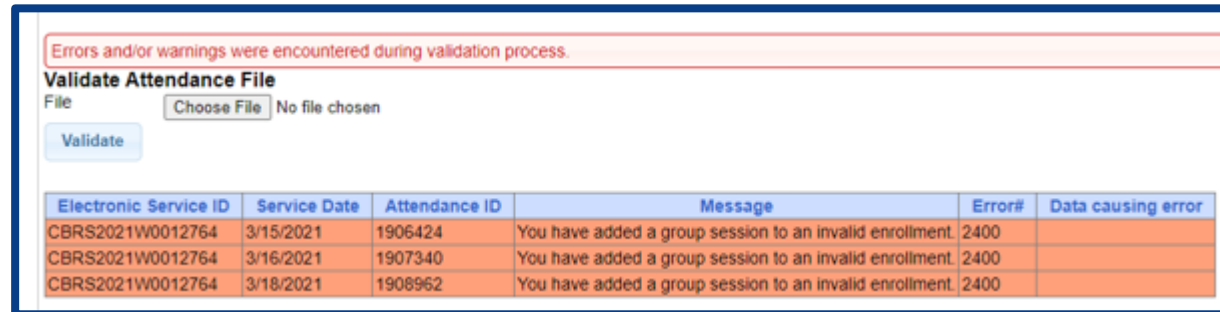
Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1912207	The file contains a duplicate/overlapping attendance on 3/16/2021 for Electronic Service ID CBRS2021W0012942	2310	
CBRS2021W0012942	3/16/2021	1907076	The file contains a duplicate/overlapping attendance on 3/16/2021 for Electronic Service ID CBRS2021W0012942	2310	



Common Validation Group Attendance Errors

Common Validation Group Attendance Errors

- * You have added a group session to an invalid enrollment:
 - * *Check enrollment to ensure that the group session is on a group ESID # and not an individual ESID enrollment.*



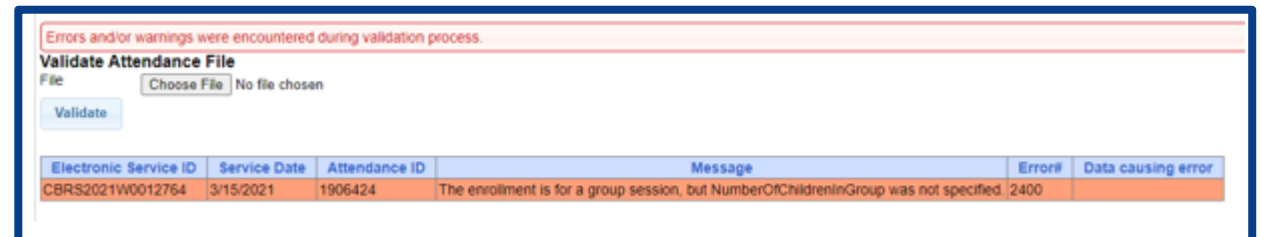
Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	You have added a group session to an invalid enrollment.	2400	
CBRS2021W0012764	3/16/2021	1907340	You have added a group session to an invalid enrollment.	2400	
CBRS2021W0012764	3/18/2021	1908962	You have added a group session to an invalid enrollment.	2400	

- * The enrollment is for a group session, but Number Of Children In Group was not specified:
 - * *Add # of children to group session.*



Errors and/or warnings were encountered during validation process.

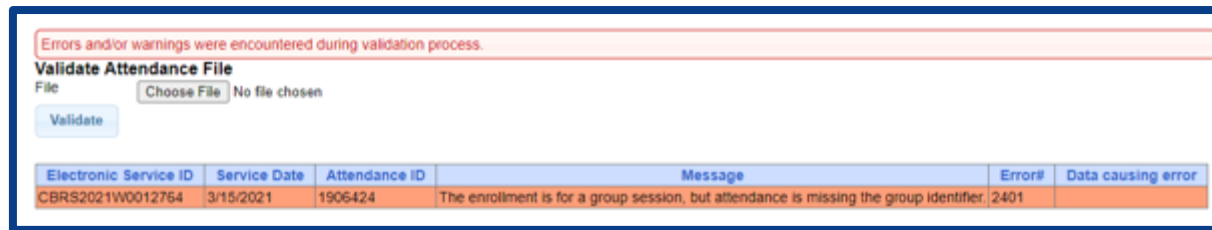
Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	The enrollment is for a group session, but NumberOfChildrenInGroup was not specified.	2400	

Common Validation Group Attendance Errors

- * The enrollment is for a group session, but attendance is missing the group identifier:
 - * *Check attendance and enter group identifier.*



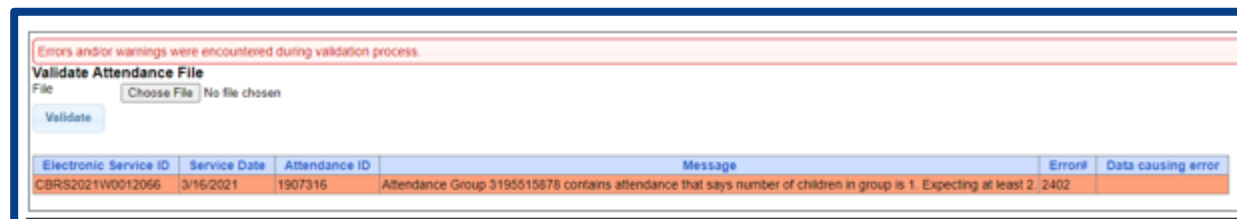
Errors and/or warnings were encountered during validation process.

Validate Attendance File

File: No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	The enrollment is for a group session, but attendance is missing the group identifier.	2401	

- * Attendance Group # contains attendance that says number of children in group is 1. Expecting at least 2:
 - * *Check group attendance, as there must be at least 2 children chosen with possibly one child marked as absent.*



Errors and/or warnings were encountered during validation process.

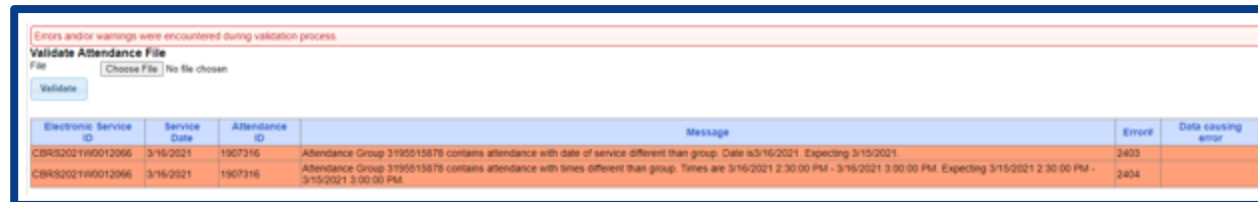
Validate Attendance File

File: No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012056	3/16/2021	1907316	Attendance Group 3195515878 contains attendance that says number of children in group is 1. Expecting at least 2.	2402	

Common Validation Group Attendance Errors

- * Attendance group contains attendance with date of service different than group or times different than group:
 - * *Check all times and dates of service for children in group and make sure they are the same date & time.*



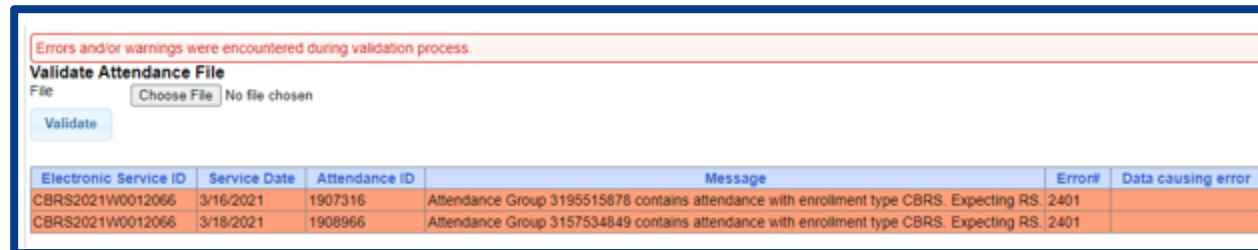
Errors and/or warnings were encountered during validation process.

Validate Attendance File

File: No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012066	3/16/2021	1907316	Attendance Group 3195515878 contains attendance with date of service different than group. Date is 3/16/2021. Expecting 3/15/2021	2403	
CBRS2021W0012066	3/16/2021	1907316	Attendance Group 3195515878 contains attendance with times different than group. Times are 3/16/2021 2:30:00 PM - 3/16/2021 3:00:00 PM. Expecting 3/15/2021 2:30:00 PM - 3/15/2021 3:00:00 PM.	2404	

- * Attendance Group contains attendance with enrollment type CBRS. Expecting RS.
 - * *Check the enrollment types.*



Errors and/or warnings were encountered during validation process.

Validate Attendance File

File: No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012066	3/16/2021	1907316	Attendance Group 3195515878 contains attendance with enrollment type CBRS. Expecting RS.	2401	
CBRS2021W0012066	3/18/2021	1908966	Attendance Group 3157534849 contains attendance with enrollment type CBRS. Expecting RS.	2401	

Common Validation Group Attendance Errors

- * Attendance Group contains attendance with service type OT1. Expecting PT1.
 - * *Check the enrollment types.*

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012066	3/16/2021	1907316	Attendance Group 3195515678 contains attendance with service type OT1. Expecting PT1	2402	
CBRS2021W0012066	3/18/2021	1908966	Attendance Group 3157534849 contains attendance with service type OT1. Expecting PT1	2402	

- * Attendance Group contains more than 5 attendances. This is not allowed.
 - * *Group attendance cannot be more than 5 students.*

Errors and/or warnings were encountered during validation process.

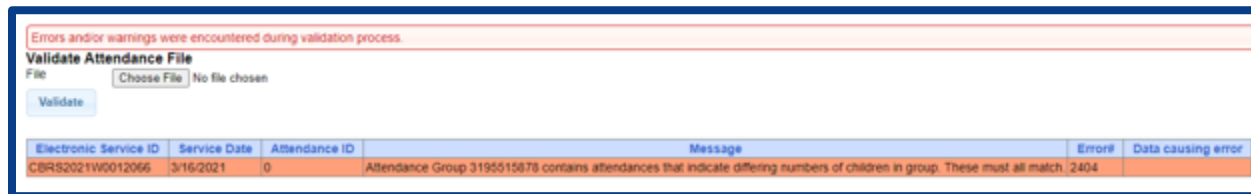
Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
RS2021W0024805	6/9/2021	0	Attendance Group 2347253579 contains more than 5 attendances. This is not allowed.	2403	

Common Validation Group Attendance Errors

- * Attendance Group contains attendances that indicate differing numbers of children in group. They must all match:
 - * *Check each attendance for children in group for specific date. All attendances for that group session must contain the same number of children.*



Errors and/or warnings were encountered during validation process.

Validate Attendance File

File: No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012066	3/16/2021	0	Attendance Group 3195515878 contains attendances that indicate differing numbers of children in group. These must all match.	2404	



Common Validation Signature Errors

Common Validation Signature Errors

- * Digital signature signed therapist identifier does not match service provider for attendance.
 - * *Check identifier for therapist who signed attendance for this service.*



Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	Digital signature signed therapist identifier does not match service provider for attendance.	3000	

- * Digital co-signature signee does not exist in database.
 - * *Check Portal and verify that the therapist cosigning session notes is in the Portal.*



Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	Digital cosignature signee does not exist in database.	3001	Type: NPI / Value: 1508419000

Common Validation Signature Errors

- * External signature OR co-signature signature OR QA signature signee does not exist in database:
 - * *The therapist, supervisor or quality assurance supervisor who signed note is not in the Portal.*

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	External signature signee does not exist in database.	3002	Type:NPI / Value:1336738086

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	External cosignature signee does not exist in database.	3003	Type:NPI / Value:1336738000

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	External QA signature signee does not exist in database.	3004	Type:NPI / Value:1336738000



Common Validation Code Errors

Common Validation Code Errors

- * CPT Code does not exist in CPSE Portal:
 - * Check CPT Code entered on attendance, and change if necessary. If CPT Code is correct, then contact the CPSE Portal help desk at support@CPSEPortal.com.

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012931	3/16/2021	1906903	CPT Code 6784511 does not exist in CPSEPortal.	4000	6784511

- * No ICD Code entered for this attendance:
 - * *Check attendance service date of ESID #, and enter ICD Code.*

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012931	3/16/2021	1906903	No ICD Code entered for this attendance.	4001	ICD entered:

Common Validation Code Errors

- * ICD Code does not exist in CPSE Portal. Contact your county representative if you believe it should be added:
 - * *Contact the County*

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File No file chosen

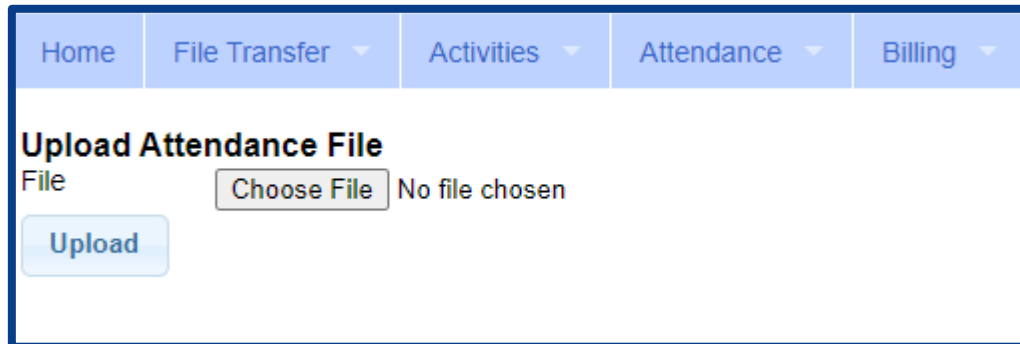
Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012931	3/16/2021	1906903	ICD Code F00 does not exist in CPSEPortal. Contact your county representative if you believe it should be added.	4001	ICD entered: F00



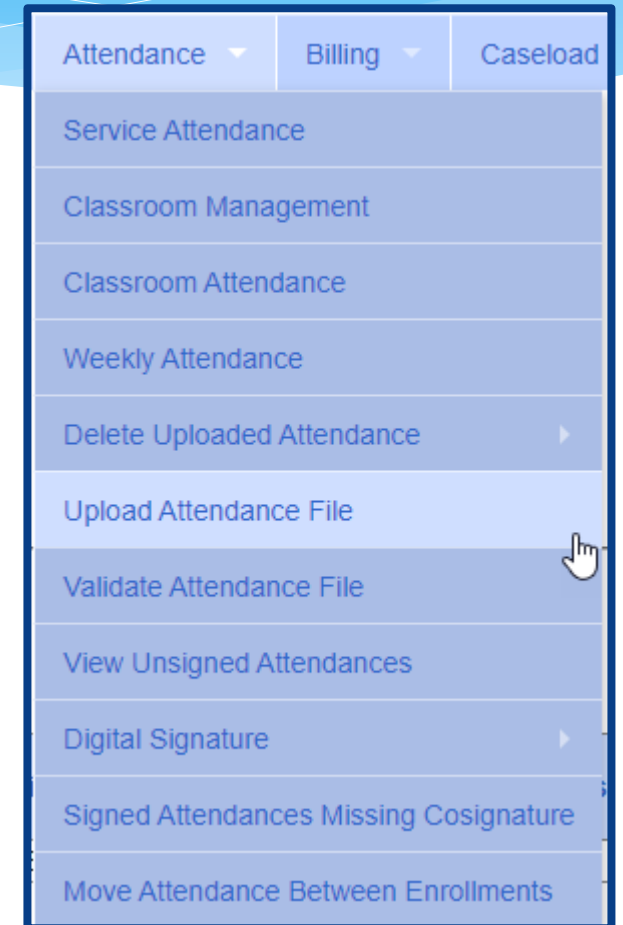
Upload Attendance File

Upload Attendance File

- * To upload your Schema Attendance File, go to **Attendance > Upload Attendance File**.
- * Click Choose File, look for your file, and click **Upload**.



The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'File Transfer', 'Activities', 'Attendance', and 'Billing'. Below the navigation bar, the page title is 'Upload Attendance File'. Underneath, there is a 'File' label, a 'Choose File' button, and the text 'No file chosen'. At the bottom of the form, there is an 'Upload' button.





Creating Vouchers

Voucher Terminology

* **Create Voucher:**

- * The first step in creating a voucher is to enter its important information, including specifying the billing criteria that the voucher will contain (which county, enrollment type, and school year session).

* **Voucher Info:**

- * Clicking the "Info" button will bring up the same screen as the "Create Voucher" button, but with the voucher's information pre-entered for you allowing you to edit some information.

* **Voucher Details:**

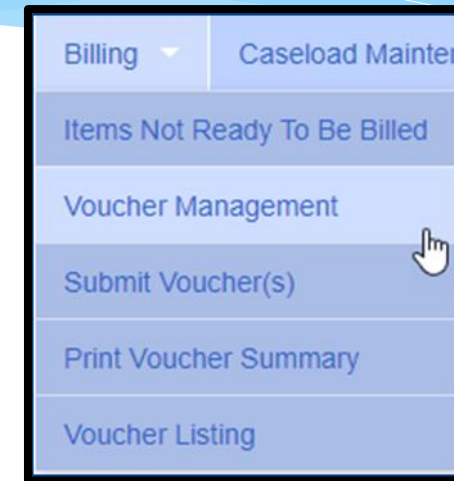
- * This screen is used to add new monthly billing items (and their corresponding attendances) to a voucher, you use this screen. On the left are monthly items that are ready for billing, but not on any voucher yet. On the right are monthly items currently on this voucher. Note: Attendances won't be shown in the "Unassigned" grid until they are signed or co-signed, if applicable. Check which items you would like to move, the click either "Assign" or "Unassign", depending on what action you would like to take. The "Amount Billed" will update accordingly. These changes do not take effect until you click "Save".


* **Recalculation:**

- * This screen introduces a concept known as recalculation of billing items. You can recalculate pending vouchers individually, or all of them at once. The recalculation process determines monthly billing amounts for any enrollments that match the criteria for the voucher contents. These billing items are summarized to a single item for the month. NOTE: Attendances must go through the recalculation and summarizing in order to be added to vouchers. It will also add any new attendances to a voucher if the enrollment month is already on the voucher.

Creating a Voucher

- * When ready to bill, you will need to create your voucher.
- * Go to **Billing > Voucher Management**
- * Click “Create Voucher”



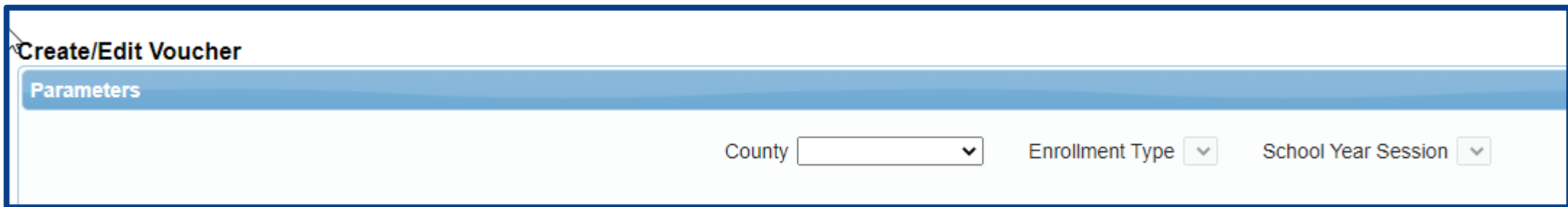
Recalc All Create Voucher 

Pending Vouchers

Voucher #	Vendor Invoice #	County Doc #	Bill Date	Service	County	Time Period	Description	Enroll. Count	Total Billed				
RS210310122341			3/10/2021	RS	Albany	2019 - 2020 Winter		0	\$0.00	Info	Details	Recalc	Delete

Creating a Voucher

- * Choose filter options for Parameters of voucher:
 - * Select County
 - * Select Enrollment (Service) Type
 - * Select School Year Session



The screenshot shows a web interface for creating or editing a voucher. At the top left, there is a tab labeled "Create/Edit Voucher". Below this is a section titled "Parameters". In the bottom right corner of the parameters section, there are three dropdown menus: "County", "Enrollment Type", and "School Year Session". Each dropdown menu has a small downward-pointing arrow icon.

Creating a Voucher

- * Once you select the previous filters, then the additional options will open up.
- * You can fill in the Service Month From & Service Month to dates. The only notes that will then populate to bill for will be those dates chosen.

Create/Edit Voucher

Parameters

County Enrollment Type School Year Session Related Service Code SED Program Code

Service Month From Service Month To

Creating a Voucher

* Voucher for RS or CBRS:

- * **Related Services** – you can bill all related services together by leaving the Related Service Code blank. (Jefferson County wants all services grouped together).
- * **Center Based Related Services (CBRS)** - will be grouped together under the SED Program Code that you choose. **CBRS MUST be billed and voucher submitted to the county at the same time when billing for Center Based (CB) programs.** Your voucher amount for CBRS will be \$0.

Create/Edit Voucher

Parameters

County

Enrollment Type

School Year Session

Related Service Code

SED Program Code

Service Month From

Service Month To

Creating a Voucher

- * Voucher numbers are auto-assigned.
- * The Vendor invoice Number is how you as the agency might identify the Voucher.
- * The County Document # is how the County might identify the Voucher (for example a pre-printed County specific numbered Voucher).

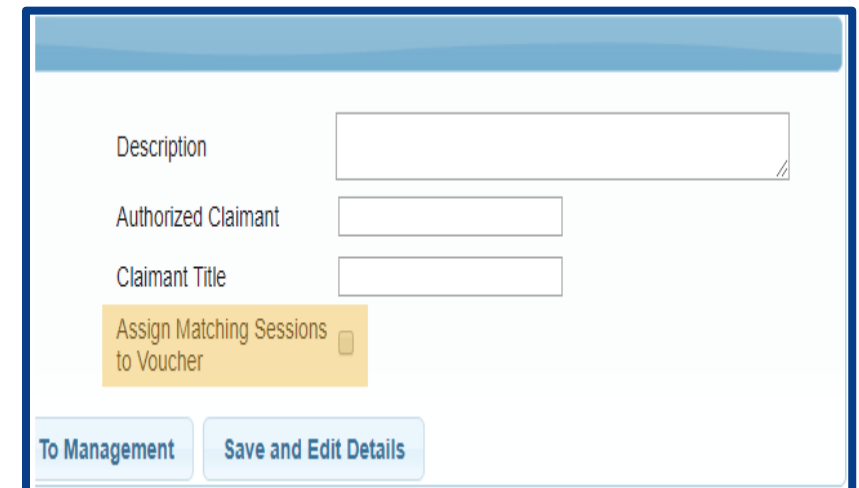
The screenshot shows a software interface window titled "Info". It contains the following fields and controls:

Voucher #	<input type="text"/>
Vendor Invoice #	<input type="text"/>
County Document #	<input type="text"/>
Billing Date	<input type="text" value="06/08/18"/>

At the bottom right of the window, there are two buttons: "Cancel" and "Save and Return".

Creating a Voucher

- * If you would like the system to automatically assign matches of the chosen criteria, check “Assign Matching Sessions”
- * This can be used in place of choosing each individually.
- * These may be unassigned if you do not wish to apply, this is just to skip a step in assigning attendances to a Voucher.
- * The description is how you can identify the voucher (I.E.- May 2021 SEIT)
- * Authorized Claimant – for independent provider this is the therapist. For agency this is the billing admin.
- * Claimant Title – title of claimant (ex. President)
- * Click Save and Return to Management



The screenshot shows a web form for creating a voucher. It includes the following fields and controls:

- Description:** A large text input field.
- Authorized Claimant:** A text input field.
- Claimant Title:** A text input field.
- Assign Matching Sessions to Voucher:** A checkbox with a yellow highlight.
- To Management:** A button at the bottom left.
- Save and Edit Details:** A button at the bottom right.

Creating a Voucher

- * When you create a voucher, a recalculation will occur and attendances matching the criteria will be marked for billing.
- * Below is a screen shot of a completed created empty voucher.

Create/Edit Voucher

Parameters

County Enrollment Type School Year Session SED Program Code

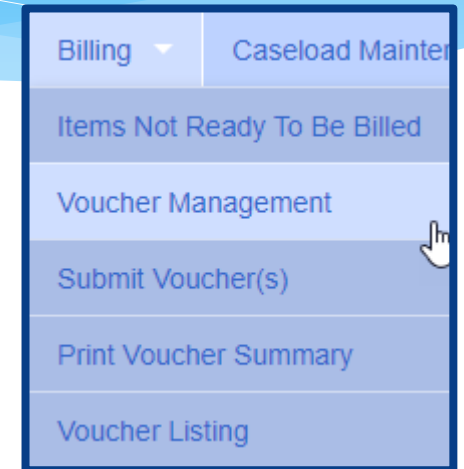
Service Month From Service Month To

Info

Voucher #	<input type="text"/>	Description	<input type="text" value="July 2022 CB"/>
Vendor Invoice #	<input type="text"/>	Authorized Claimant	<input type="text" value="Gloria Gaynor"/>
County Document #	<input type="text"/>	Claimant Title	<input type="text" value="Billing Admin"/>
Billing Date	<input type="text" value="07/31/24"/>	Assign Matching Sessions to Voucher	<input checked="" type="checkbox"/>
Contract Number:	<input type="text"/>		

Creating a Voucher

- * After creating your voucher go to **Billing > Voucher Management**.
- * This will bring up all pending vouchers waiting to be billed.
- * Click on the Details of the voucher that you want to bill.



Pending Vouchers													
Voucher #	Vendor Invoice #	County Doc #	Bill Date	Service	County	Time Period	Description	Enroll. Count	Total Billed				
CB220613131			6/13/2022	CB	ULSTER	April 2022	April 1-1 Aide - Remaining	0	\$0.00	Info	Details	Recalc	Delete
CB220613134			6/13/2022	CB	ULSTER	May 2022	Ulster - May CB 9100	0	\$0.00	Info	Details	Recalc	Delete

Creating a Voucher

- * Assign applicable enrollment on left under "Unassigned" by checking each box or check the box at the top and all enrollments will highlight.
- * Click "Assign"

January 2023 Service Code: Filter

January 2023 Program Code: 9100

Unassigned

<input type="checkbox"/>	Last Name	First Name	Month	Sessions	Amount	Svc	ESID
<input type="checkbox"/>	ALVAREZ	WILDA	January 2023	6	\$0.00 (R)	OT	CBRS2223W0053216
<input type="checkbox"/>	ALVAREZ	WILDA	January 2023	7	\$0.00 (R)	PT	CBRS2223W0053217
<input type="checkbox"/>	BARAJAS	AMADO	January 2023	11	\$0.00 (R)	ST	CBRS2223W0051749
<input type="checkbox"/>	BAXTER	ANTONY	January 2023	11	\$0.00 (R)	ST	CBRS2223W0052305
<input type="checkbox"/>	BULLARD	IAN	January 2023	9	\$0.00 (R)	ST	CBRS2223W0049384
<input type="checkbox"/>	BULLARD	IAN	January 2023	6	\$0.00 (R)	OT	CBRS2223W0049385
<input type="checkbox"/>	BUNDY	NATHANIEL	January 2023	10	\$0.00 (R)	ST	CBRS2223W0050217
<input type="checkbox"/>	BUNDY	NATHANIEL	January 2023	6	\$0.00 (R)	OT	CBRS2223W0050218
<input type="checkbox"/>	BUTTERFIELD	WILLIE	January 2023	8	\$0.00 (R)	ST	CBRS2223W0052798
<input type="checkbox"/>	BUTTERFIELD	WILLIE	January 2023	6	\$0.00 (R)	OT	CBRS2223W0052799

For missing entries, try clicking "recalc" or checking Items Not Ready to Bill!


Assign -->

Creating a Voucher

- * Enrollments that were checked have now been moved to "Assigned" column.
- * To remove an enrollment from the voucher, check the check box of applicable enrollment and click "Unassign".
- * Click "Save"

Assigned

<input type="checkbox"/>	Last Name	First Name	Service Month	Sessions	Amount Billed	Svc	ESID
<input type="checkbox"/>	ADAIR	ROSS	January 2023	10	\$0.00 (R)	ST	CBRS2223W0047300
<input type="checkbox"/>	ADAIR	ROSS	January 2023	7	\$0.00 (R)	OT	CBRS2223W0047301
<input type="checkbox"/>	AHMED	JANENE	January 2023	10	\$0.00 (R)	ST	CBRS2223W0051535
<input type="checkbox"/>	AHMED	JANENE	January 2023	5	\$0.00 (R)	PT	CBRS2223W0051536
<input type="checkbox"/>	ALVAREZ	WILDA	January 2023	11	\$0.00 (R)	ST	CBRS2223W0053215
<input type="checkbox"/>	BUTTERFIELD	WILLIE	January 2023	5	\$0.00 (R)	PT	CBRS2223W0052800
<input type="checkbox"/>	KESSLER	IONA	January 2023	1	\$0.00 (R)	OT	CBRS2223W0054958
<input type="checkbox"/>	MARSH	SALVADOR	January 2023	8	\$0.00 (R)	PT	CBRS2223W0054278
<input type="checkbox"/>	NUNEZ	ALEJANDRO	January 2023	6	\$0.00 (R)	PT	CBRS2223W0053362
<input type="checkbox"/>	WADDELL	JOSEFINE	January 2023	5	\$0.00 (R)	PT	CBRS2223W0052350



Creating a Voucher

Voucher Details

Info

Voucher#: Description:

Vendor Invoice# Authorized Claimant:

County Doc # Claimant Title:

Billing Date:

Contract Number:

A=Adjustment R=Regular

January 2023 Service Code: **Unassigned**

January 2023 Program Code:

<input type="checkbox"/>	Last Name	First Name	Month	Sessions	Amount	Svc	ESID
<input type="checkbox"/>	ALVAREZ	WILDA	January 2023	6	\$0.00 (R)	OT	CBRS2223W0053216
<input type="checkbox"/>	ALVAREZ	WILDA	January 2023	7	\$0.00 (R)	PT	CBRS2223W0053217
<input type="checkbox"/>	BARAJAS	AMADO	January 2023	11	\$0.00 (R)	ST	CBRS2223W0051749
<input type="checkbox"/>	BAXTER	ANTONY	January 2023	11	\$0.00 (R)	ST	CBRS2223W0052305
<input type="checkbox"/>	BULLARD	IAN	January 2023	9	\$0.00 (R)	ST	CBRS2223W0049384
<input type="checkbox"/>	BULLARD	IAN	January 2023	6	\$0.00 (R)	OT	CBRS2223W0049385
<input type="checkbox"/>	BUNDY	NATHANIEL	January 2023	10	\$0.00 (R)	ST	CBRS2223W0050217
<input type="checkbox"/>	BUNDY	NATHANIEL	January 2023	6	\$0.00 (R)	OT	CBRS2223W0050218
<input type="checkbox"/>	BUTTERFIELD	WILLIE	January 2023	8	\$0.00 (R)	ST	CBRS2223W0052798
<input type="checkbox"/>	BUTTERFIELD	WILLIE	January 2023	6	\$0.00 (R)	OT	CBRS2223W0052799

For missing entries, try clicking "recalc" or checking Items Not Ready to Bill!

Assigned

<input type="checkbox"/>	Last Name	First Name	Service Month	Sessions	Amount Billed	Svc	ESID
<input type="checkbox"/>	ADAIR	ROSS	January 2023	10	\$0.00 (R)	ST	CBRS2223W0047300
<input type="checkbox"/>	ADAIR	ROSS	January 2023	7	\$0.00 (R)	OT	CBRS2223W0047301
<input type="checkbox"/>	AHMED	JANENE	January 2023	10	\$0.00 (R)	ST	CBRS2223W0051535
<input type="checkbox"/>	AHMED	JANENE	January 2023	5	\$0.00 (R)	PT	CBRS2223W0051536
<input type="checkbox"/>	ALVAREZ	WILDA	January 2023	11	\$0.00 (R)	ST	CBRS2223W0053215
<input type="checkbox"/>	BUTTERFIELD	WILLIE	January 2023	5	\$0.00 (R)	PT	CBRS2223W0052800
<input type="checkbox"/>	KESSLER	IONA	January 2023	1	\$0.00 (R)	OT	CBRS2223W0054958
<input type="checkbox"/>	MARSH	SALVADOR	January 2023	8	\$0.00 (R)	PT	CBRS2223W0054278
<input type="checkbox"/>	NUNEZ	ALEJANDRO	January 2023	6	\$0.00 (R)	PT	CBRS2223W0053362
<input type="checkbox"/>	WADDELL	JOSEFINE	January 2023	5	\$0.00 (R)	PT	CBRS2223W0052350

Creating a Voucher

- * Anytime a new attendance is added to voucher details screen, a recalculation on the corresponding voucher is required in order to mark the attendance as ready for billing.
- * Click “Recalc”
- * New attendance is then automatically added to the voucher.
- * Click “Save”

For missing entries, try clicking "recalc" or checking Items Not Ready to Bill!

<input type="checkbox"/>	NUNEZ	ALEJANDRO	January 2023	6	\$0.00 (R)	PT	CBRS2223W0053362
<input type="checkbox"/>	WADDELL	JOSEFINE	January 2023	5	\$0.00 (R)	PT	CBRS2223W0052350

Assign --> <-- Unassign

Return to Voucher Management **Recalc** Save View Items Not Ready To Bill

Amount Billed: \$0.00



Missing Attendance

Why Doesn't Attendance Appear on my Voucher?

- * There are several reasons why attendances are not available to be put on a voucher. On the Voucher Details Screen, attendances will not appear on the list of items to put on a voucher for the following reasons:
 - * **The attendance has been added or modified (matched, signed/co-signed) since the voucher was created:**
 - * Try using “Recalc” to have system look for ready attendances.
 - * **The attendance is on an unmatched enrollment (no ESID):**
 - * Match to County Created enrollment and use “Recalc”.
 - * **The attendance is missing a Signed Date or Cosigned Date:**
 - * **The rates have not yet been uploaded:**
 - * This can be checked by going to **Lookup -> Enrollment Lookup** and Select the School Year Session, County, Provider, and Enrollment Type.
 - * The column on the right that reads "Rates" will show if there is anything there other than \$0.
- * You should continually be reviewing your Items Not Ready To Be Billed report.

Items Not Ready to Bill

- * Another way to see why attendance doesn't appear on your voucher is to run an Items Not Ready to Bill Report.
- * Go to **Billing > Items Not Ready To Be Billed**
- * This report will not show unmatched children or unmatched enrollments, but does show:
 - * Attendances missing signatures
 - * Attendances not co-signed
 - * Attendances are outside of enrollment dates



Items Not Ready to Bill

- * Complete filters needed to sort attendances by provider, month or enrollment type.
- * You will need to choose the county, as this report will sort attendances by the county and will not combine counties together.

Items Not Ready To be Billed

Filters

Provider: County: *

School Year Session: Service Month From: Service Month To:

Enrollment Type: Service Type: Program Code:

Items Not Ready to Bill

- * On the Items Not Ready to Bill report there is a column labeled Problem. This will show the reason why the attendance cannot be billed at this time. Most often are:
 - * Attendances Not Signed / Not Co-Signed
 - * Attendances Outside of Enrollment Dates
 - * Unmatched Child / Unmatched Enrollment
 - * Rescinded


Items Not Ready To be Billed

Filters

Provider: County:

School Year Session: Service Month From: Service Month To:

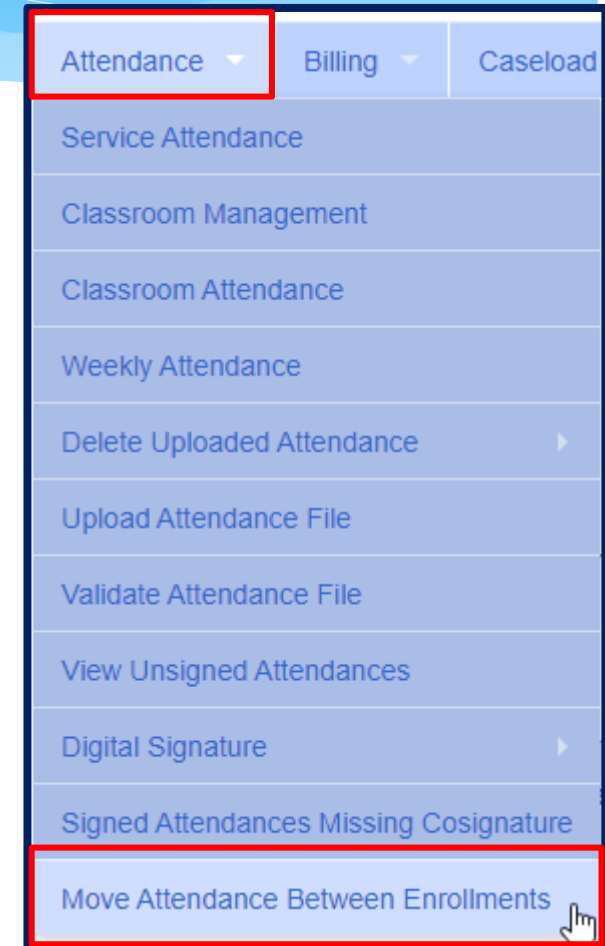
Enrollment Type: Service Type: Program Code:



Last Name	First Name	ServiceProvider	DOB	ESID	From	To	Month	Service Dates	Problem	ServiceType	Frequency	Sessions	Amount	
CHERRY	YONG	HOFFMAN, KRISTEN	04/15/15	RS1920W0015042	11/20/19	06/26/20	Mar 2020	3/4, 3/11	Not signed	ST1 (Grp)	1x30	2.00	\$103.00	Attendances
CHERRY	YONG	HOFFMAN, KRISTEN	04/15/15	RS1920W0015043	11/20/19	06/26/20	Mar 2020	3/2, 3/6, 3/9	Not signed	ST (Indv)	1x30	3.00	\$154.50	Attendances

Move Attendance Between Enrollments

- * If attendances have been entered on the wrong enrollment, then they can be moved from one enrollment to another without the service provider having to recreate the attendances.
- * In order to move the attendances, they **cannot** be on a voucher.
- * Go to **Attendance -> Move Attendances Between Enrollments**.



Move Attendance Between Enrollments

- * Filter the School Year, Provider & Last Name of the child.
- * This will pull up all enrollments for the child for the school year chosen.

Move Attendance Between Enrollments

School Year Session: Provider: Last Name:

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	ST	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	OT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	PT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009574			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009573			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CBRS2122W0035916			CBRS	9/8/2021	12/17/2021	ST	3x30	I	Select

Move Attendance Between Enrollments

- * Select Enrollment by clicking “Select” to the Right.
- * Check correct attendances boxes on left,
- * Click on “Select” on right for applicable enrollment,
- * Click on “Move” to move attendance to the other enrollment,
- * You will the confirmation: *Attendances Moved Successfully.*

Move Attendance Between Enrollments

School Year Session: Provider: Last Name:

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	ST	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	OT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	PT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009574			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009573			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CBRS2122W0035916			CBRS	9/8/2021	12/17/2021	ST	3x30	I	Select
2021 - 2022	...	KINGSTON CITY											

Selected Enrollment Info

	Service Date	Service Provider	Individual Or Group
<input type="checkbox"/>	12/2/2021		I
<input type="checkbox"/>	12/6/2021		I
<input type="checkbox"/>	12/9/2021		I
<input type="checkbox"/>	12/20/2021		I
<input type="checkbox"/>	12/21/2021		I

	County	District	ESID	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group
Select	ULSTER	KINGSTON CITY SD		RS	9/7/2021	6/24/2022	ST	3x30	I
Select	ULSTER	KINGSTON CITY SD	CBRS2122W0036246	CBRS	12/18/2021	6/23/2022	ST	3x30	I

Move Attendance Between Enrollments

Move Attendance Between Enrollments

School Year Session: Provider: Last Name:

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	ST	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	OT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	PT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009574			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009573			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CBRS2122W0035916			CBRS	9/8/2021	12/17/2021	ST	3x30	I	Select
2021 - 2022	...	KINGSTON CITY											

Selected Enrollment Info

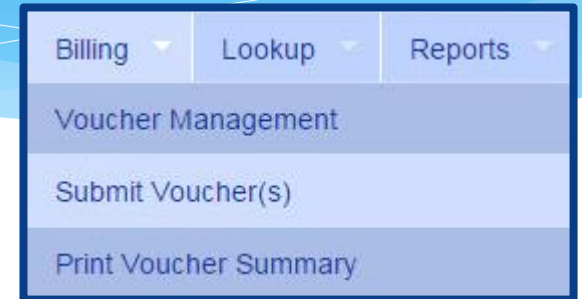
Service Date	Service Provider	Individual Or Group	County	District	ESID	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group
<input type="checkbox"/> 1/5/2022		I	Select ULSTER	KINGSTON CITY SD	CBRS2122W0035918	CBRS	9/8/2021	12/17/2021	PT	3x30	I
<input type="checkbox"/> 1/6/2022		I	Select ULSTER	KINGSTON CITY SD	CBRS2122W0036248	CBRS	12/18/2021	6/23/2022	PT	3x30	I
<input type="checkbox"/> 1/11/2022		I									
<input type="checkbox"/> 1/19/2022		I									
<input type="checkbox"/> 1/20/2022		I									
<input type="checkbox"/> 1/24/2022		I									
<input type="checkbox"/> 1/25/2022		I									
<input type="checkbox"/> 1/26/2022		I									
<input type="checkbox"/> 1/27/2022		I									
<input type="checkbox"/> 3/2/2022		I									
<input type="checkbox"/> 3/3/2022		I									
<input type="checkbox"/> 3/4/2022		I									



Submitting Vouchers

Submitting a Voucher

- * To submit voucher(s) to county, go to **Billing > Submit Voucher(s)**.
- * Select unbilled voucher by checking box (or Select All).



Submit voucher(s) for ULSTER county (unbilled CB vouchers).

ULSTER CB

Select any Unbilled Vouchers

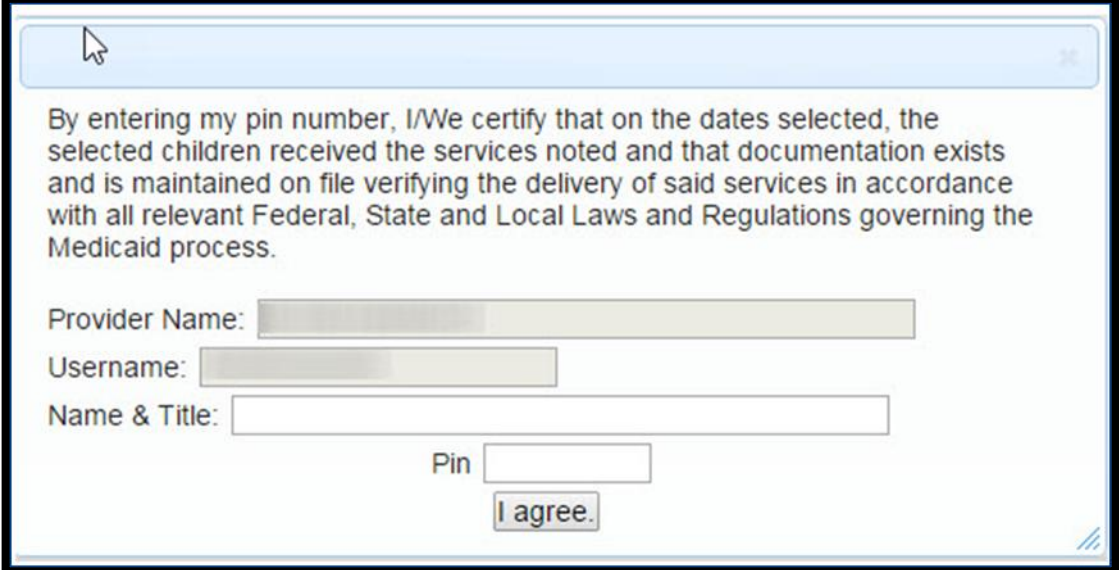
Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed	
<input checked="" type="checkbox"/>	1/11/2022	CB220111104807							18	\$52,452.00	
<input type="checkbox"/>	1/18/2022	CB220118152217							9	\$28,736.64	Problems on Voucher View Problems

Select All Total Billed: \$52,452.00

Submit Voucher(s)

Submitting a Voucher

- * After clicking "Submit Voucher(s)" - You will then get the screen on the right.
- * Enter your personal PIN – Click "I Agree".
- * You will get "Voucher Submitted Successfully" confirmation message at the top of the page.
- * The voucher summary should pop up automatically upon submission. If for some reason it does not, continue with the following instruction on how to "Print Voucher Summary".



The screenshot shows a web browser window with a form for submitting a voucher. The form contains a certification statement, several input fields, and an 'I agree.' button.

By entering my pin number, I/We certify that on the dates selected, the selected children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Provider Name:

Username:


Name & Title:

Pin

NOTE: Once you submit a voucher to the county, it is NO longer possible to edit it's contents. Should you need to make a change to your submitted voucher, you can go to **Billing > Voucher Listing** to see if the county has downloaded your voucher. If the county has not downloaded the voucher then you can click "Un-Submit", and retrieve the voucher for corrections and resubmit. If the county has downloaded the voucher, the "Un-Submit" button will not be available to you.

Voucher Summary

- * Sign the voucher summary, and send to County .



Voucher Summary

Printed: 6/21/2022 8:39:56 AM

Page 1 of 1

Provider: _____	Bill Date: 1/18/2022	County: ULSTER
Vendor#: _____	Submitted : _____	CPSE Voucher#: CB220118152217
Tax ID: _____	Time Period: December 2021	Vendor Invoice#: _____
BEDS Code: 620600998101		County Doc#: _____
Voucher Description: _____		Contract Or Account#: _____


Child Name	ESID	Program Code	Frequency	Rate	Billing Method	Paymt Type	Month	Amount
BARRIOS, CLINT	CB2122W0009550	9100	5 hrs/day - I	\$898.02	WEEKLY DYNAMIC	R	Dec-21	\$0.00
BARRIOS, CLINT	CB2122W0009592	9100	5 hrs/day - I	\$0.00	WEEKLY DYNAMIC	R	Dec-21	\$3,592.08
GRANADOS, EFREN	CB2122W0009615	9100	5 hrs/day - I	\$898.02	WEEKLY DYNAMIC	R	Dec-21	\$3,592.08
KENNY, LUPE	CB2122W0009536	9100	5 hrs/day - I	\$898.02	WEEKLY DYNAMIC	R	Dec-21	\$3,592.08
LEUNG, ANDERSON	CB2122W0009373	9100	5 hrs/day - I	\$898.02	WEEKLY DYNAMIC	R	Dec-21	\$3,592.08
MALLORY, JEAN	CB2122W0009405	9100	5 hrs/day - I	\$898.02	WEEKLY DYNAMIC	R	Dec-21	\$3,592.08
MCLAIN, TOD	CB2122W0009511	9100	5 hrs/day - I	\$898.02	WEEKLY DYNAMIC	R	Dec-21	\$3,592.08
ORNELAS, PHYLLIS	CB2122W0009408	9100	5 hrs/day - I	\$898.02	WEEKLY DYNAMIC	R	Dec-21	\$3,592.08
WU, ELVIN	CB2122W0009566	9100	5 hrs/day - I	\$898.02	WEEKLY DYNAMIC	R	Dec-21	\$3,592.08
Grand Total:								\$28,736.64

I certify that on the dates above, the above named child received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Authorized Signature: _____	Certification: _____
------------------------------------	-----------------------------

Voucher Summary

- * The Portal does not record remote learning for Classroom Attendance.
- * If needed, you can list child and write "R" at the bottom of page.



Classroom Attendance

Printed: 6/21/2022 8:39:58 AM

Page 1 of 1

Provider: _____
County: ULSTER
Classroom: _____ **Month:** December 2021


	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F
Child Name	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
	A																														
BARRIOS, CLINT	A	A	A			A	A	A	A	A			A	A	A	A	A			A	A	A	A								
CLIFTON, CONSUELA																															
DOCKERY, EDWARD																															
GRANADOS, EFREN	A	P	P			P	A	A	A	A			P	P	P	P	P			P	P	A	P								
KENNY, LUPE	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	A	P								
LEUNG, ANDERSON	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	P	P								
MALLORY, JEAN	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	P	P								
MCLAIN, TOD	P	P	P			A	A	A	A	A			P	P	A	P	P			P	A	A	A								
ORNELAS, PHYLLIS	P	A	P			P	P	P	P	P			P	P	P	P	P			P	P	P	A								
REEDER, PAUL																															
WU, ELVIN	P	P	P			A	A	A	A	P			A	P	A	A	P			P	P	A	A								

I certify that on the dates above, the above named children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Signature:

Center Based Related Service - CBRS Voucher

- * CBRS vouchers will list all related service sessions in the CB program with a zero amount.
- * The CBRS voucher **must** accompany the CB voucher when submitting to the County.



Voucher Summary

Printed: 6/21/2022 9:02:04 AM

Page 1 of 1

Provider: _____

Vendor#: _____

Tax ID: _____

BEDS Code: 620600998101

Voucher Description: _____

Bill Date: 10/27/2021

Submitted : _____

Time Period: September 2021

County: ULSTER

CPSE Voucher#: CBRS211027112902

Vendor Invoice#: _____

County Doc#: _____

Contract Or Account#: _____

Child Name	ESID	Frequency	Service	Dates Of Service	Rate	Units	Minutes Per Unit	Amount
CULVER, WANDA	CBRS2122W0035806	1x30 - I	CBRS - TVI	Sep 2021 - 8,15,22	\$0.00	3.00	30	\$0.00
ENNIS, LENARD	CBRS2122W0035849	2x30 - I	CBRS - OT	Sep 2021 - 10,23,24,30	\$0.00	4.00	30	\$0.00
ENNIS, LENARD	CBRS2122W0035848	3x30 - I	CBRS - ST	Sep 2021 - 20,21,27,28	\$0.00	4.00	30	\$0.00
JUDD, PARKER	CBRS2122W0035891	2x30 - I	CBRS - OT	Sep 2021 - 21,23,28,30	\$0.00	4.00	30	\$0.00
JUDD, PARKER	CBRS2122W0035890	3x30 - I	CBRS - ST	Sep 2021 - 28,29,30	\$0.00	3.00	30	\$0.00
JUDD, PARKER	CBRS2122W0035888	1x30 - I	CBRS - ST	Sep 2021 - 9,10,14,21,23,24	\$0.00	6.00	30	\$0.00
LEUNG, ANDERSON	CBRS2122W0035448	3x30 - I	CBRS - ST	Sep 2021 - 13,14,20,21,23,27,28,30	\$0.00	8.00	30	\$0.00
LEUNG, ANDERSON	CBRS2122W0035450	2x30 - I	CBRS - PT	Sep 2021 - 8,9,15,17,20,24,27,29	\$0.00	8.00	30	\$0.00
LEUNG, ANDERSON	CBRS2122W0035452	4x30 MONTHLY - I	CBRS - TVI	Sep 2021 - 9,10,13,14,15,17,20,21,22,23,27,29,30	\$0.00	13.00	30	\$0.00
LEUNG, ANDERSON	CBRS2122W0035449	2x30 - I	CBRS - OT	Sep 2021 - 9,15,21,21,23,28,30	\$0.00	7.00	30	\$0.00
LUKE, ODIS	CBRS2122W0035917	3x30 - I	CBRS - OT	Sep 2021 - 8,17,20,21,22,24,27,29	\$0.00	8.00	30	\$0.00
MALLORY, JEAN	CBRS2122W0035468	3x30 - I	CBRS - ST	Sep 2021 - 8,10,13,15,17,20,22,27,29	\$0.00	9.00	30	\$0.00
MCLAIN, TOD	CBRS2122W0035769	2x30 - I	CBRS - PT	Sep 2021 - 10,15,17,22,24,29	\$0.00	6.00	30	\$0.00
MCLAIN, TOD	CBRS2122W0035767	3x30 - I	CBRS - ST	Sep 2021 - 8,10,13,15,17,20,22,27,29	\$0.00	9.00	30	\$0.00
MCLAIN, TOD	CBRS2122W0035768	2x30 - I	CBRS - OT	Sep 2021 - 8,13,17,20,22,27,29	\$0.00	7.00	30	\$0.00
ORNELAS, PHYLLIS	CBRS2122W0035471	2x30 - I	CBRS - PSY	Sep 2021 - 10,14,21,22,24,28,30	\$0.00	7.00	30	\$0.00
Grand Total:								\$0.00

I certify that on the dates above, the above named child received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Authorized Signature: _____ **Certification:** _____



Cannot Submit Voucher

Problems on Voucher

* If you cannot submit a voucher do to **Problems on Voucher** – click “View Problems”.

Submit voucher(s) for MONTGOMERY county (unbilled SEIT vouchers).

MONTGOMERY SEIT

Select any Unbilled Vouchers

Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed	
<input checked="" type="checkbox"/>	8/4/2022	SEIT220804143228				Montgomery SEIT July 2022		Accountant	2	\$0.00	
<input checked="" type="checkbox"/>	8/15/2022	SEIT220815160442				Montgomery SEIT August 2022		Accountant	2	\$0.00	
<input type="checkbox"/>	10/14/2022	SEIT221014105311				Montgomery SEIT Sept 2022		acc	1	\$0.00	Problems on Voucher View Problems
<input type="checkbox"/>	11/11/2022	SEIT2211111124536				Montgomery SEIT October 2022		Accountant	1	\$0.00	Problems on Voucher View Problems
<input type="checkbox"/>	2/21/2023	SEIT230221153051				MONT SEIT JAN 2023		President	1	\$0.00	Problems on Voucher View Problems

Select All Total Billed: \$0.00

Submit Voucher(s)

Problems on Voucher – View Problems

- * Under the *Problem* column you can see what the problem is.
- * Click on *Attendances* to see which attendances have an issue.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		CBRS2324W0	9/7/2023	6/21/2024	ST (Indv)	3x30	Missing Service Location	Attendances
		CBRS2324W0	3/4/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97110	Attendances
		CBRS2324W0	3/4/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97112	Attendances
		CBRS2324W0	3/4/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97116	Attendances
		CBRS2324W0	9/7/2023	10/19/2023	PT (Indv)	3x30	Duplicate CPT Codes for Attendance	Attendances
		CBRS2324W0	2/12/2024	6/21/2024	PT (Indv)	2x45	Invalid CPT Code Units: 0 for code: 97116	Attendances
		CBRS2324W0	2/12/2024	6/21/2024	PT (Indv)	2x45	Invalid CPT Code Units: 0 for code: 97530	Attendances
		CBRS2324W0	9/7/2023	6/21/2024	PT (Indv)	2x30	Duplicate CPT Codes for Attendance	Attendances

Problems on Voucher – Attendance Issue

- * Any attendances having an issue will appear in red.
- * You can view the session note / treatment log.
- * Child must be removed from voucher before therapist can, unsign, correct and resign attendance.

Service Date	Type	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	Treatment Log
09/08/23	Provided Treatment Session			11:00 AM	11:30 AM	30	1.00	30		Therapy Room I	I	09/08/23	09/08/23	CBRS240618112554	Treatment Log
09/11/23	Provided Treatment Session			9:30 AM	10:00 AM	30	1.00	30		Therapy Room I	I	09/27/23	09/27/23	CBRS240618112554	Treatment Log
09/13/23	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30		Therapy Room I	I	09/27/23	09/27/23	CBRS240618112554	Treatment Log
09/18/23	Provided Treatment Session			11:30 AM	12:00 PM	30	1.00	30		Therapy Room I	I	09/27/23	09/27/23	CBRS240618112554	Treatment Log
09/20/23	Provided Treatment Session			11:30 AM	12:00 PM	30	1.00	30		Therapy Room I	I	09/27/23	09/27/23	CBRS240618112554	Treatment Log
09/22/23	Provided Treatment Session			9:00 AM	9:30 AM	30	1.00	30		Therapy Room I	I	10/03/23	10/03/23	CBRS240618112554	Treatment Log
09/27/23	Provided Treatment Session			12:00 PM	12:30 PM	30	1.00	30		Therapy Room I	I	10/03/23	10/03/23	CBRS240618112554	Treatment Log
09/29/23	Provided Treatment Session			11:00 AM	11:30 AM	30	1.00	30		Therapy Room I	I	10/03/23	10/03/23	CBRS240618112554	Treatment Log
10/02/23	Provided Treatment Session			9:30 AM	10:00 AM	30	1.00	30		Therapy Room I	I	10/06/23	10/06/23	CBRS240618112652	Treatment Log
10/04/23	Provided Treatment Session			11:30 AM	12:00 PM	30	1.00	30		Therapy Room I	I	10/06/23	10/06/23	CBRS240618112652	Treatment Log
10/06/23	Provided Treatment Session			10:00 AM	10:30 AM	30	1.00	30		Therapy Room I	I	10/13/23	10/13/23	CBRS240618112652	Treatment Log
10/11/23	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30		Therapy Room I	I	10/13/23	10/13/23	CBRS240618112652	Treatment Log
10/16/23	Provided Treatment Session			9:00 AM	9:30 AM	30	1.00	30		Therapy Room I	I	10/17/23	10/17/23	CBRS240618112652	Treatment Log
10/25/23	Provided Treatment Session			11:00 AM	11:30 AM	30	1.00	30		Therapy Room I	I	10/27/23	10/27/23	CBRS240618112652	Treatment Log
10/27/23	Provided Treatment Session			11:00 AM	11:30 AM	30	1.00	30		Therapy Room I	I	10/27/23	10/27/23	CBRS240618112652	Treatment Log
10/30/23	Provided Treatment Session			9:00 AM	9:30 AM	30	1.00	30		Therapy Room I	I	11/03/23	11/03/23	CBRS240618112652	Treatment Log
11/01/23	Provided Treatment Session			11:00 AM	11:30 AM	30	1.00	30		Therapy Room I	I	11/03/23	11/03/23	CBRS240618114603	Treatment Log
11/03/23	Provided Treatment Session			11:30 AM	12:00 PM	30	1.00	30		Therapy Room I	I	11/03/23	11/03/23	CBRS240618114603	Treatment Log
11/06/23	Provided Treatment Session			11:30 AM	12:00 PM	30	1.00	30		Therapy Room I	I	11/13/23	11/13/23	CBRS240618114603	Treatment Log
11/13/23	Provided Treatment Session			8:30 AM	9:00 AM	30	1.00	30		Preschool	I	11/20/23	11/20/23	CBRS240618114603	Treatment Log
11/15/23	Provided Treatment Session			9:00 AM	9:30 AM	30	1.00	30		Preschool	I	11/20/23	11/20/23	CBRS240618114603	Treatment Log
11/17/23	Provided Treatment Session			9:30 AM	10:00 AM	30	1.00	30		Preschool	I	11/20/23	11/20/23	CBRS240618114603	Treatment Log
11/20/23	Provided Treatment Session			9:30 AM	10:00 AM	30	1.00	30		Preschool	I	11/27/23	11/27/23	CBRS240618114603	Treatment Log
11/27/23	Provided Treatment Session			9:00 AM	9:30 AM	30	1.00	30		Preschool	I	12/01/23	12/01/23	CBRS240618114603	Treatment Log
11/29/23	Provided Treatment Session			9:00 AM	9:30 AM	30	1.00	30		Preschool	I	12/01/23	12/01/23	CBRS240618114603	Treatment Log

Other Possible Problems

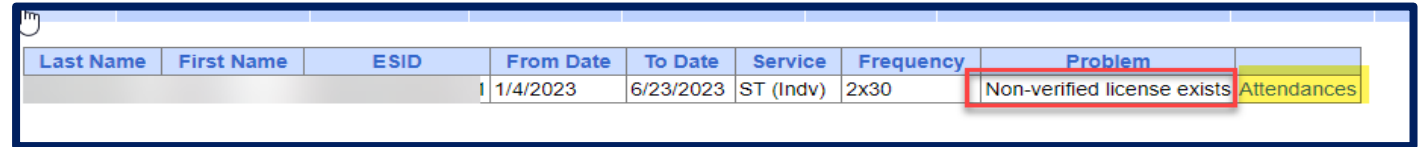
- * When submitting the voucher, you may have problems listed below:
 - * **Invalid CPT Code Units** – you cannot have zero units for a CPT code.
 - * **Duplicate CPT Codes for Attendance** – you cannot have duplicate CPT codes. You can have multiple codes with a specific number of units.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
A		CBRS2324	9/7/2023	6/21/2024	ST (Indv)	3x30	Missing Service Location	Attendances
A		CBRS2324	3/4/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97110	Attendances
A		CBRS2324	3/4/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97112	Attendances
A		CBRS2324	3/4/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97116	Attendances
E		CBRS2324	9/7/2023	10/19/2023	PT (Indv)	3x30	Duplicate CPT Codes for Attendance	Attendances
E		CBRS2324	2/12/2024	6/21/2024	PT (Indv)	2x45	Invalid CPT Code Units: 0 for code: 97116	Attendances
E		CBRS2324	2/12/2024	6/21/2024	PT (Indv)	2x45	Invalid CPT Code Units: 0 for code: 97530	Attendances
C		CBRS2324	9/7/2023	6/21/2024	PT (Indv)	2x30	Duplicate CPT Codes for Attendance	Attendances
C	R	CBRS2324	9/7/2023	11/14/2023	PT (Indv)	3x30	Duplicate CPT Codes for Attendance	Attendances
C	R	CBRS2324	11/15/2023	6/21/2024	PT (Indv)	3x45	Duplicate CPT Codes for Attendance	Attendances
C		CBRS2324	9/7/2023	6/21/2024	PT (Indv)	2x30	Duplicate CPT Codes for Attendance	Attendances
F		CBRS2324	9/7/2023	6/21/2024	PT (Indv)	2x30	Duplicate CPT Codes for Attendance	Attendances
F		CBRS2324	9/7/2023	6/21/2024	PT (Indv)	1x30	Duplicate CPT Codes for Attendance	Attendances
L		CBRS2324	1/2/2024	6/21/2024	PT (Indv)	2x30	Duplicate CPT Codes for Attendance	Attendances
L		CBRS2324	2/26/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97112	Attendances
L		CBRS2324	2/26/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97116	Attendances
L		CBRS2324	4/2/2024	6/21/2024	ST (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances

Other Possible Problems

* Non-verified License Exists:

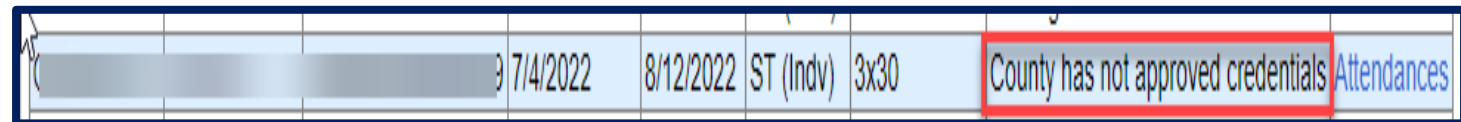
- * Click on the “Attendances” to see who the service provider is.
- * Go to **People -> Service Provider Credential Verification Listing** and verify credentials of therapist.
- * Once credentials are verified you will need to “Recalc” your voucher.
- * Your county will then approve credentials.



Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		1	1/4/2023	6/23/2023	ST (Indv)	2x30	Non-verified license exists	Attendances

* County Has Not Approved Credentials:

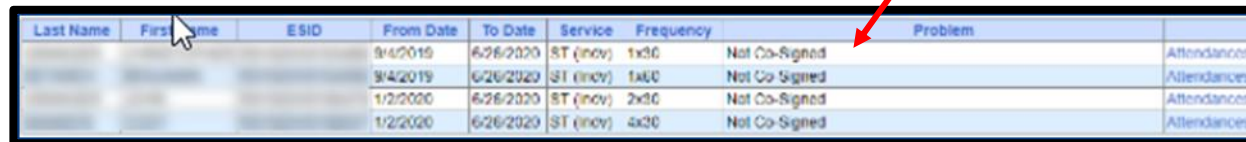
- * Click on the “Attendances” to see who the service provider is.
- * Contact your county to approve credentials for service provider.
- * If you are from Dutchess, Jefferson, Livingston, Rockland, Nassau, Sullivan or Westchester County, then contact McGuinness and we will approve the credentials.



			7/4/2022	8/12/2022	ST (Indv)	3x30	County has not approved credentials	Attendances
--	--	--	----------	-----------	-----------	------	-------------------------------------	-------------

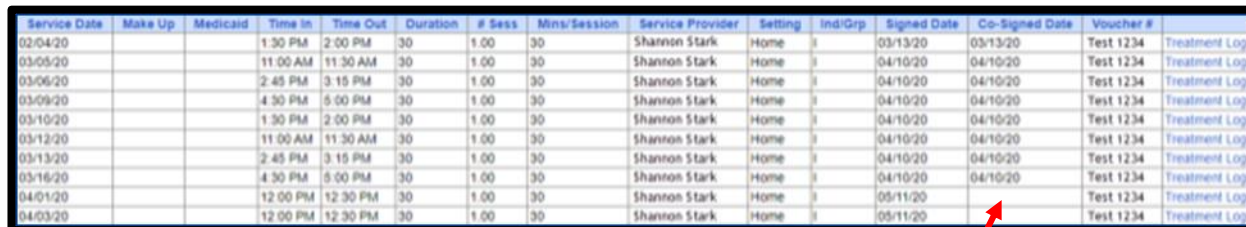
Cannot Submit Voucher: Problem of “Not Co-Signed”

- * When submitting a voucher, if you see “Problems on Voucher” and click “View Problems,” you may come across the problem “Not Co-Signed.”



Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
			9/4/2019	6/26/2020	ST (invy)	1x30	Not Co-Signed	Attendances
			9/4/2019	6/26/2020	ST (invy)	1x30	Not Co-Signed	Attendances
			1/2/2020	6/26/2020	ST (invy)	2x30	Not Co-Signed	Attendances
			1/2/2020	6/26/2020	ST (invy)	4x30	Not Co-Signed	Attendances

- * When you click on “Attendances,” you will see a listing of all of the attendances for that enrollment.



Service Date	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	
02/04/20			1:30 PM	2:00 PM	30	1.00	30	Shannon Stark	Home	I	03/13/20	03/13/20	Test 1234	Treatment Log
03/09/20			11:00 AM	11:30 AM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/06/20			2:45 PM	3:15 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/09/20			4:30 PM	5:00 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/10/20			1:30 PM	2:00 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/12/20			11:00 AM	11:30 AM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/13/20			2:45 PM	3:15 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/16/20			4:30 PM	5:00 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
04/01/20			12:00 PM	12:30 PM	30	1.00	30	Shannon Stark	Home	I	05/11/20		Test 1234	Treatment Log
04/03/20			12:00 PM	12:30 PM	30	1.00	30	Shannon Stark	Home	I	05/11/20		Test 1234	Treatment Log

Missing Prescriptions

- * When submitting the voucher, you may have a problem of:
 - * Details of Prescription/order not entered for enrollment – ***You will need to upload the prescription, enter information and attach the enrollments to the prescription.***

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
			2/17/2023	6/23/2023	ST (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances
			2/17/2023	6/23/2023	OT (Indv)	1x30	Details of Prescription/order not entered for enrollment	Attendances
			2/21/2023	6/23/2023	PT (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances

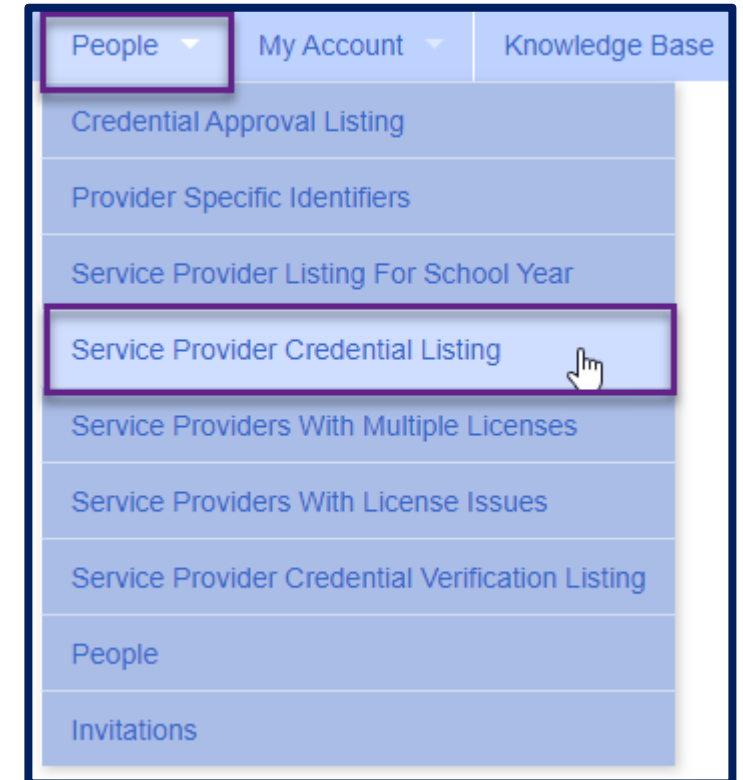
Cannot Submit Voucher: Problem of “Not Co-Signed”

- * If a fully licensed provider signs the attendances and their credentials do not require them to have a co-signature, the “Co-Signed Date” will auto-populate with the same information as “Signed Date.”
- * If the therapist’s credentials expire, ***this will no longer be the case***. If you look at the previous screenshot, all of the attendances through March had this date auto-fill, but starting in April this was no longer the case.
 - * In the Portal, the therapist’s license end date was listed as 03/31/20. This meant that everything on/after 04/01/20 was registering as needing a separate co-signature; this is why the dates no longer pre-filled.
 - * The system reads these attendances as not being done by a fully licensed provider until the license end date is updated in the system.
 - * If the attendances were already on the voucher, you will need to proceed through the following steps. If you noticed this before getting to the voucher, you will be able to skip Step 3.

Problem of “Not Co-Signed”

Step 1

- * There are two ways for the credential dates to be updated:
- * You, as the agency administrator can make the correction:
 - * Go to **People** -> **Service Provider Credential Listing**.



Cannot Submit Voucher: Problem of “Not Co-Signed”

- * From here, you will click “Retrieve” and see a listing of all therapists within the given criteria.
- * You will then scroll to the therapist in question and view the credential dates. If you see below, the “Registered Through Date” for this therapist’s license is 04/30/20.
- * If you have the option of “Edit,” you will be able to correct this yourself.
- * If you only see “View,” then you will **not** be able to make the correction to their account as they are in the CPSE Portal working with multiple agencies. Contact the CPSE Portal Support Team at: support@CPSEPortal.com, and we will make the necessary changes for you.


Service Providers Listing with Credentials

Filters

County: Provider:

Active on:

Last Name	First Name	NPI	NPI Status	NPI Registry Name	Profession	License	Original Issue Date	Registered Through Date	Cert #	Username	
HOFFMAN	KRISTEN	1508012717		GEBAUER, BETTY	Licensed Speech & Language Pathologist	008342	12/20/94	04/30/20		KRIST.HOFFMAN73	<input type="button" value="Edit"/>



Problem of “Not Co-Signed”

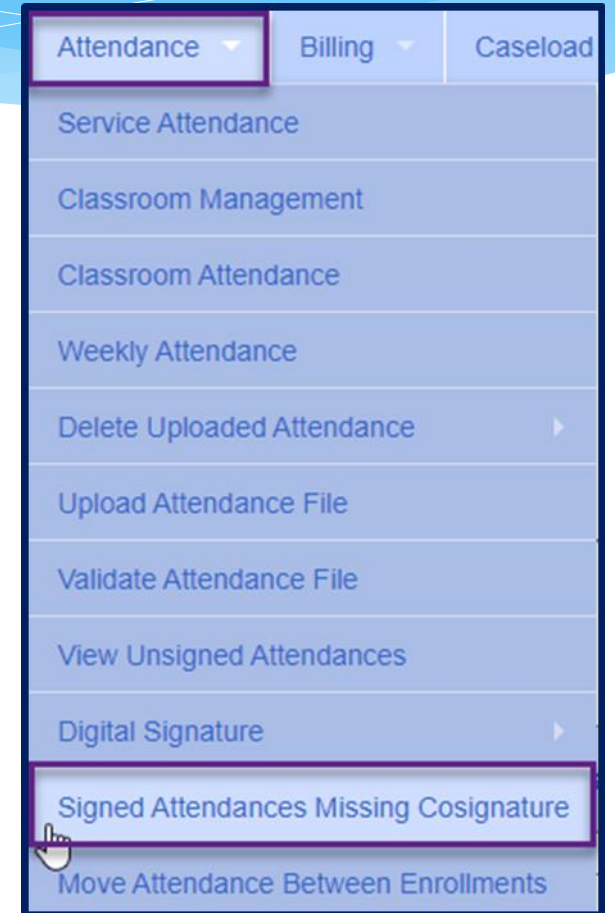
Step 2

- * After the credential dates are updated, the Credential Verification will also need to be re-done. This can be done by the agency by following the instructions on the previous webinar slides or click on the link below.
- * <http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx?KBSearchID=14295>

Problem of “Not Co-Signed”

Step 3

- * The attendances now **no longer** need to be removed from the voucher, but instead you can "re-check" the attendances.
- * To do this go to **Attendance -> Signed Attendances Missing Cosignature**



Cannot Submit Voucher: Problem of “Not Co-Signed”

- * "Retrieve" for the school year in question and you will see "ReCheck" as a column. If you know that you have corrected and verified the credentials, the "ReCheck" will allow you to refresh without removing the attendances from the voucher or un-signing.
- * You can also view the credentials from here as well.

NOTE:

- * If the credentials were not changed, and the problem was pointing to the Credential Verification; simply complete the credential verification as noted in Step 2.
- * Not all counties require the electronic credential verifications.

Problem of “Not Co-Signed”

- * "Retrieve" for the school year in question and you will see "ReCheck" as a column. If you know that you have corrected and verified the credentials, the "ReCheck" will allow you to refresh without removing the attendances from the voucher or un-signing.
- * You can also view the credentials from here as well.

Signed Attendances Missing Cosignature

Filters: School Year

Provider	Last Name	First Name	ESID	Service Date	Service	Therapist Last Name	Therapist First Name	Meets Medicaid Requirements	Can Person Sign	ReCheck	Credentials	Attendance Correction
			CBRS2122W00	05/04/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/05/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/11/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/12/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/18/2022	ST 3x30 Individual			No	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/19/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/26/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/31/2022	ST 3x30 Individual			No	True	ReCheck	View Credentials	Edit

NOTE:

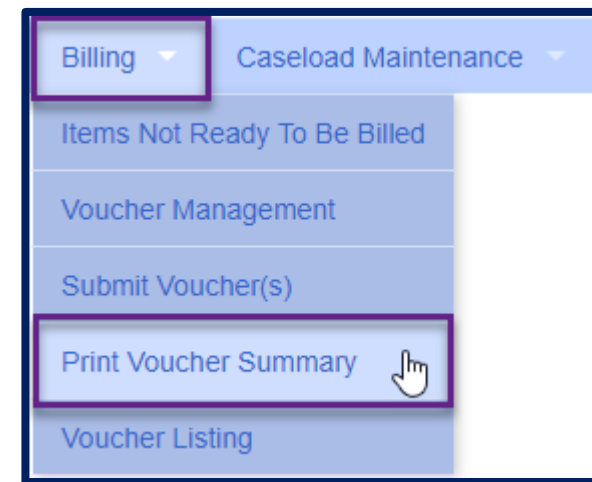
- * If the credentials were not changed, and the problem was pointing to the Credential Verification; simply complete the credential verification as noted in Step 2.
- * Not all counties require the electronic credential verifications.



Print Voucher Summary


Print Voucher Summary

* Go to **Billing** -> **Print Voucher Summary**



Print Voucher Summary

- * Complete filters if needed to find a specific voucher.
- * Click "Print" link for applicable voucher

Home	File Transfer	Activities	Attendance	Billing	Caseload Maintenance	Lookup	Documents	Reports	Medicaid	People	My Account	Knowledge Base
Print Voucher Summary Reports												
Filter By...												
School Year Session: (All School Year Sessions) Enrollment Type: (All Enrollment Types) County: (All Billed Counties) Billing Month: (All Billing Months) Service Month: (All Service Months) Voucher Status:												
(Any Voucher Status)												
Apply Filter												
Voucher #	Enrollment Type	Description	Billing Date	Total Billed	Submitted Date	Claimant Title	Authorized Claimant	Destination County	# Enrollments	Print All Voucher Submission Reports		
RS200308133551	RS	FEB. 2020	3/8/2020	\$4,261.50	3/8/2020	CCC-SLP	Betty P. Gebauer	SCHENECTADY	22		Print	
RS200308133622	RS	FEBRUARY 2020	3/8/2020	\$2,926.00	3/8/2020	CCC-SLP	Betty P. Gebauer	Albany	11		Print	
RS200213143706	RS	JAN. 2020	2/13/2020	\$3,993.00	2/14/2020	CCC-SLP	Betty P. Gebauer	Albany	10		Print	
RS200205073831	RS	JAN. 2020	2/5/2020	\$5,620.50	2/9/2020	CCC-SLP	Betty P. Gebauer	SCHENECTADY	22		Print	
RS200102193725	RS	DEC. 2019	1/2/2020	\$2,486.00	1/4/2020	CCC-SLP	Betty P. Gebauer	Albany	9		Print	

Print Voucher Summary

* You will then see voucher summary:

Child Name	ESID	Frequency	Service	Dates Of Service	Rate	Units	Minutes Per Unit	Amount
HARRIS, RUBEN	RS1920S0014606	2x30 - I	RS - ST	Jul 2019 - 3, 16, 18, 23, 25, 30	\$51.50	6.00	30	\$309.00
WINTERS, LEANORA	RS1920S0014666	2x30 - I	RS - ST	Jul 2019 - 2, 16, 18, 25, 30	\$51.50	5.00	30	\$257.50
WOLFF, JOSUE	RS1920S0014564	1x30 - G	RS - ST1	Jul 2019 - 2, 18, 25	\$51.50	3.00	30	\$154.50
WOLFF, JOSUE	RS1920S0014563	1x30 - I	RS - ST	Jul 2019 - 3, 16, 24, 30	\$51.50	4.00	30	\$206.00
Grand Total:								\$927.00

I certify that on the dates above, the above named child received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Authorized Signature: _____ **Certification:** _____

Print Voucher Summary

- * Depending on your browser and set up for reading Adobe PDF documents you should see icons for saving and printing - Click "Print" icon to print summary:



- * **NOTES:**

- * When billing Center Based, the Voucher Summary includes Voucher Billing info as well as Classroom Attendance.
- * It is **IMPERATIVE** that a voucher for CBRS is created and submitted to the county along with the CB voucher even though it will have a zero billing amount. This is how the county can then bill Medicaid for any Medicaid billable services. Most counties will not pay your CB Voucher unless a CBRS Voucher is also submitted with the CB Voucher.



Attendance Denied by County?

Attendance Denied?

How to Correct and Re-Bill

- * You **MUST** confirm that the attendances have been denied by the county, and that you understand the removal is permanent.
- * If a provider makes a mistake and submits the erroneous data on a voucher, the County may choose to deny payment for certain dates of service.
- * If this occurs, and the provider would like to attempt to correct the data and resubmit on a new voucher, the process is as follows:
- * The denied attendance needs to be removed from the initial voucher. To do this, you must inform the CPSE Portal support team of the ESID and service dates that you would like removed. To do this, complete the below form and email it to **support@cpseportal.com**.
 - * **RequestToHaveAttendanceRemovedFromSubmittedVouchers.xlsx**

Attendance Denied? How to Correct and Re-Bill

* Example of form:

	A	B	C	D	E	F
1	<i>Complete the form below to request attendance entries to be removed from vouchers so they can</i>					
2	<i>be corrected and rebilled on a new voucher</i>					
3						
4	County					
5	Billing Provider Name					
6						
	Electronid Service ID (ESID)	Date of Service				
7	(*Child's, not Voucher #*)	(Date Needing to be Removed)				
8						
9						
10						
11						
12						

IMG1: Example of form to be completed

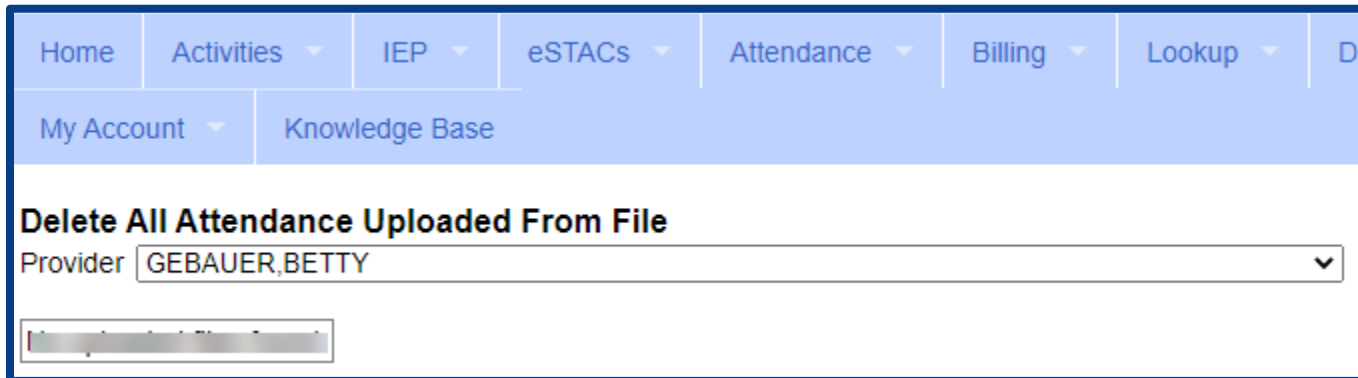
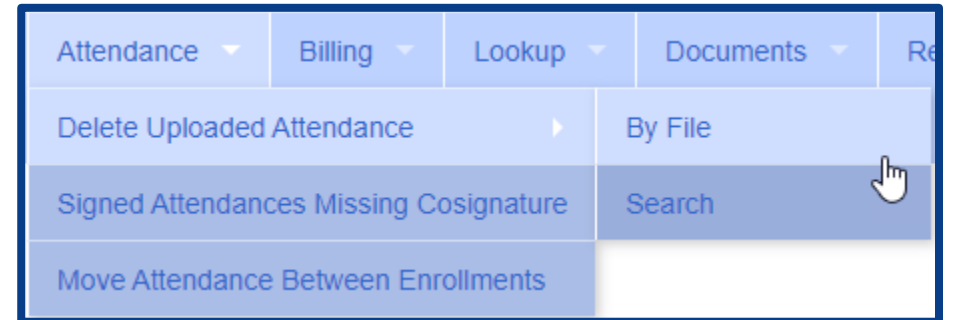
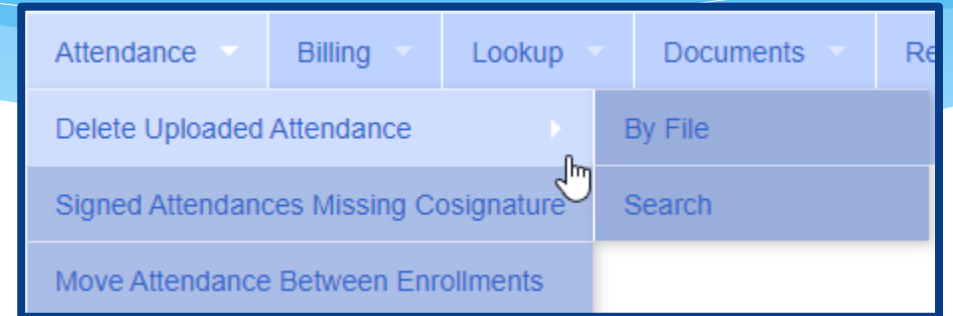
Attendance Denied?

How to Correct and Re-Bill

- * Once the attendance is no longer on a voucher:
 - * If you need to modify the treatment log:
 - * Follow steps on next slide.
 - * If the attendance needs to be moved to a different ESID because the original enrollment dates changed or was rescinded, here are the instructions:
 - * <http://support.cpseportal.com/kb/a53/move-attendance-between-enrollments.aspx>
- * The attendance can be added to a new voucher and submitted. If the attendance is not appearing, make sure you do a “**recalc**” on the voucher.

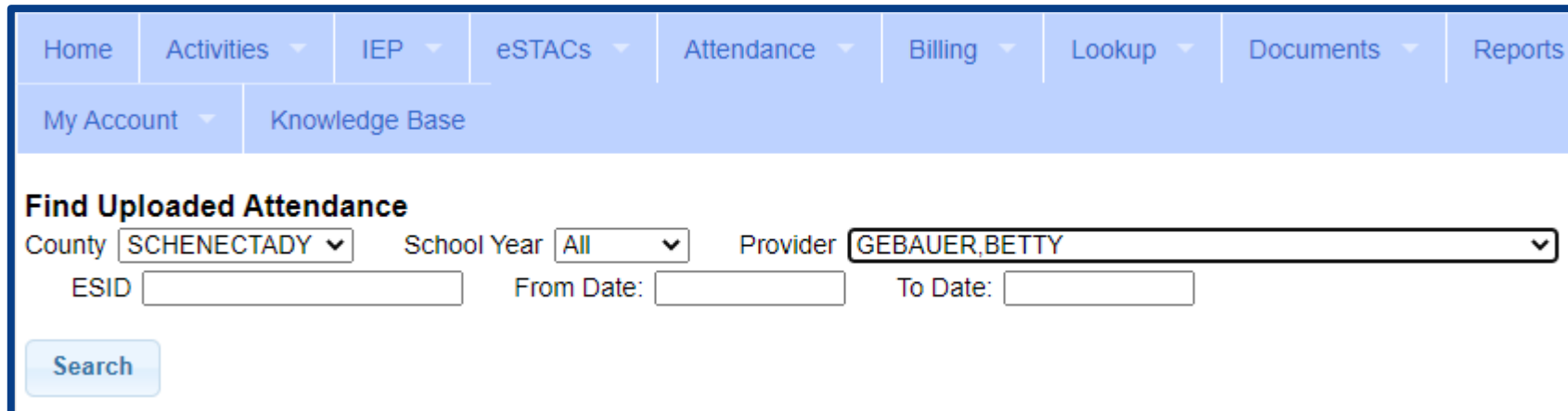
Delete Uploaded Attendance

- * You can delete either your attendance file or a single attendance.
- * To delete your attendance file go to **Attendance** > **Delete Uploaded Attendance** and choose By File



Delete Uploaded Attendance

- * To delete a single attendance, go to **Attendance > Delete Uploaded Attendance** and choose Search
- * You can search by ESID and date of attendance needed.

A screenshot of a search form titled 'Find Uploaded Attendance'. The form is set within a navigation bar that includes 'Home', 'Activities', 'IEP', 'eSTACs', 'Attendance', 'Billing', 'Lookup', 'Documents', and 'Reports'. Below the navigation bar, there are additional options: 'My Account' and 'Knowledge Base'. The search form includes the following fields:

- County: SCHENECTADY (dropdown)
- School Year: All (dropdown)
- Provider: GEBAUER,BETTY (dropdown)
- ESID: (text input)
- From Date: (text input)
- To Date: (text input)

A 'Search' button is located at the bottom left of the form.



Reports

Missing Prescriptions Report

- * Go to **Medicaid -> Prescriptions -> Enrollments Needing Prescription.**
- * You can filter the school year and the county.
- * On this page you can: Assign To Existing RX or Upload Image



Enrollments Missing Prescription

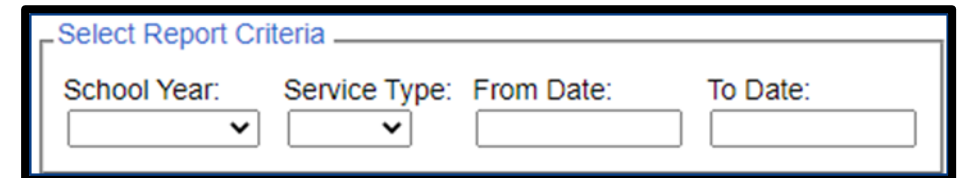
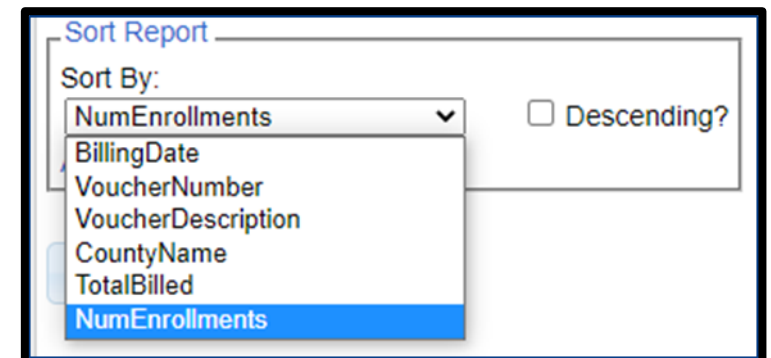
Filters

School Year Session County Provider

ESID	Child Name	From - To	RS	Frequency		
CBRS24		07/01/2024 - 08/09/2024	ST	2x30	Assign To Existing Rx	Upload Image
CBRS24		07/01/2024 - 08/09/2024	OT	1x30	Assign To Existing Rx	Upload Image
CBRS24		07/01/2024 - 08/09/2024	PT	2x30	Assign To Existing Rx	Upload Image
CBRS24		07/01/2024 - 08/09/2024	ST	2x30	Assign To Existing Rx	Upload Image
CBRS24		07/01/2024 - 08/09/2024	PT	1x30	Assign To Existing Rx	Upload Image
CBRS24		07/01/2024 - 08/09/2024	OT	1x30	Assign To Existing Rx	Upload Image

Voucher Listing Report

- * To see all Vouchers that have been submitted to the county, you can run a Voucher Listing Report.
- * Go to **Reports > Voucher Listings**
- * Enter Criteria, and choose how you want to sort your report.

A screenshot of a form titled 'Select Report Criteria'. It contains four input fields: 'School Year:' with a dropdown arrow, 'Service Type:' with a dropdown arrow, 'From Date:' with a text box, and 'To Date:' with a text box.A screenshot of a form titled 'Sort Report'. It features a 'Sort By:' dropdown menu with a list of options: 'NumEnrollments', 'BillingDate', 'VoucherNumber', 'VoucherDescription', 'CountyName', 'TotalBilled', and 'NumEnrollments' (highlighted in blue). To the right of the dropdown is a checkbox labeled 'Descending?'.

Voucher Listing Report

- * Your report will look like the screenshot below.
- * You can download or print this report for your records.

CPSE PORTAL **Voucher Listings** *Printed: 7/2/2021 3:18:00 PM*
Page 1 of 2

Report Criteria: School Year: 201819 Service Type: RS Sorted By: NumEnrollments Ascending

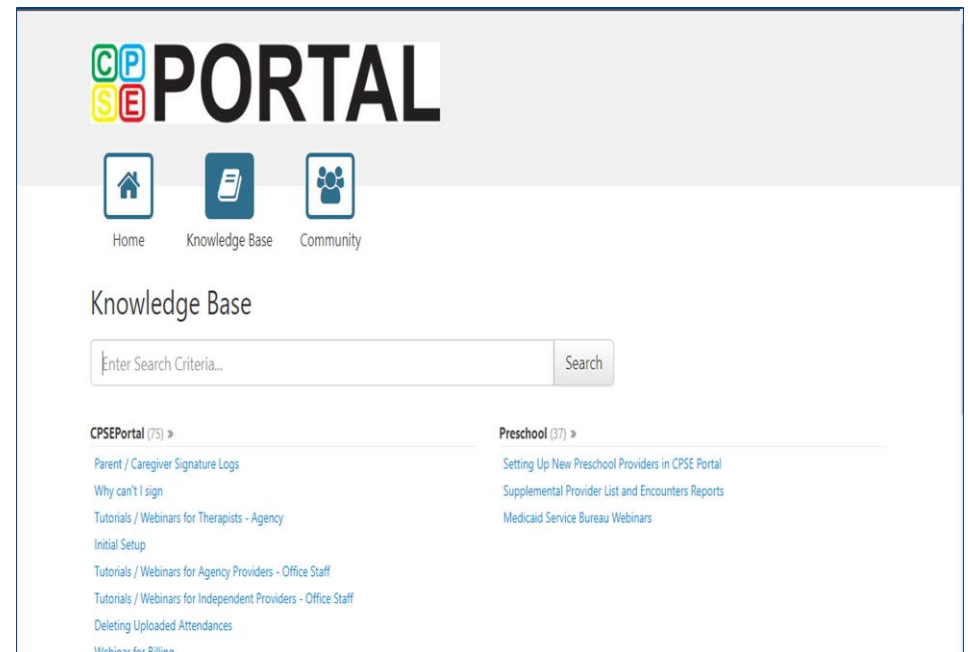
Voucher Number	Voucher Description	County Name	Billing Date	# Enrollments	Total Billed
RS190416194659	March 2019/Quinn	SCHENECTADY	4/16/2019	1	\$268.00
RS180805085528	July 2018	SCHENECTADY	8/5/2018	2	\$450.00
RS180819200723	August 2018	SCHENECTADY	8/19/2018	2	\$400.00
RS180819204244	July 2018	Albany	8/19/2018	4	\$1,100.00
RS180820185858	August 2018	Albany	8/20/2018	4	\$605.00
RS181010190803	September 2018	Albany	10/10/2018	6	\$1,870.00
RS181112190013	October 2018	Albany	11/12/2018	6	\$2,750.00
RS181208181032	November 2018	Albany	12/8/2018	7	\$2,365.00
RS190106124044	DECEMBER 2018	Albany	1/6/2019	7	\$2,090.00



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>



Helpful Knowledge Base Articles – Portal Invites & Credential Verification

- * **Import Person with License Template**

- * <http://support.cpseportal.com/kb/a126/import-person-with-license-template.aspx?KBSearchID=17027>

- * **Credential Verification for Agencies**

- * <http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx>

- * **Credential Verification for Providers with NO CPSE Portal Login**

- * <http://support.cpseportal.com/kb/a151/credential-verification-no-cpse-portal-login.aspx>

- * **County Codes**

- * <http://support.cpseportal.com/kb/a82/county-codes.aspx>

Helpful Knowledge Base Articles – Creating Vouchers

- * **Schema for Attendance File Upload**

- * <http://support.cpseportal.com/kb/a67/schema-for-attendance-file-upload.aspx?KBSearchID=16987>

- * **Creating and Submitting a Voucher**

- * <http://support.cpseportal.com/kb/a62/creating-and-submitting-a-voucher.aspx?KBSearchID=17204>

- * **Why doesn't attendance appear to be put on a voucher?**

- * <http://support.cpseportal.com/kb/a92/why-doesnt-attendance-appear-to-be-put-on-a-voucher.aspx?KBSearchID=17204>

- * **Missing a Full Diagnosis (ICD) Code**

- * <http://support.cpseportal.com/kb/a339/missing-a-full-diagnosis-icd-code.aspx?KBSearchID=25519>

Helpful Knowledge Base Articles – Creating Vouchers

- * **Attendance Denied? How to Correct and Re-Bill**

- * <http://support.cpseportal.com/kb/a81/attendance-denied-how-to-remove-in-order-to-correct-and-re-bill.aspx?KBSearchID=17075>

- * **Cannot Submit Voucher: Problem of “Not Co-Signed”**

- * <http://support.cpseportal.com/kb/a230/cannot-submit-voucher-problem-of-not-co-signed.aspx?KBSearchID=17202>

- * **How to Submit a Ticket to the CPSE Portal**

- * <http://support.cpseportal.com/kb/a188/how-to-submit-a-ticket-to-the-cpse-portal.aspx?KBSearchID=17204>

Closing Remarks

- * 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
 - * When sending an email:
 - * Do **not** use child's name
 - * Use ESID #, Child # or STAC ID #
 - * Include your county, and info needed