JAMES McGUINNESS & ASSOCIATES INC.
Consultants

Welcome to Full-Service Medicaid with James McGuinness & Associates, Inc.

INTRODUCTIONS

Who will you be working with at McGuinness?

- Deborah Frank, McGuinness Medicaid Specialist
- Lisa Mell, McGuinness Consultant

WELCOME & INITIAL TRAINING

Full-Service Medicaid with McGuinness

- James McGuinness and Associates will be working with Dutchess County as their Medicaid contractor/claiming agent.
- All providers should have received an email from the County explaining that McGuinness will be handling Medicaid claiming/billing for Dutchess County for service dates beginning **July 1, 2020**.
- You should have also received a **New Implementation Guide for Full-Service Medicaid for Providers**, which delineates the CPSE Portal Medicaid requirements and expectations for the Dutchess County Provider.

Topics Covered

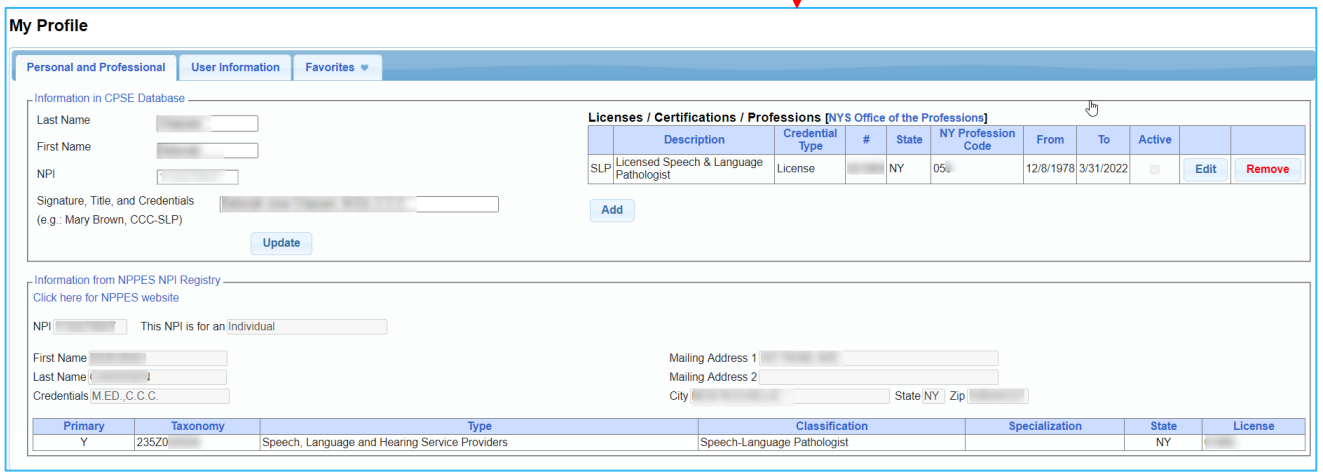
- **Overview of Medicaid Requirements & Responsibilities**
  - Portal Profiles (Agency & Therapist)
  - Center-Based Related Service Billing (CBRS)
  - Children & Enrollments (to address contemporaneous documentation)
  - Session Notes / Contemporaneous Signing
  - Credential Verification/NPI #s
  - Under the Direction Of – (Initial Face-to-Face Visit)
  - CPSE Portal Knowledge Base for Medicaid
  - One Drive – Secure File Storage
- **Medicaid Documentation**
  - Documentation Requirements
  - Documentation Verification
  - Non-Compliant and Outstanding Documentation
  - Uploading Medicaid Documentation
- **McGuinness Medicaid-in-Education Contact Information**
- **Medicaid References**

Portal Profile - Therapist

There is a one-time set-up in the Portal that is required for therapists in the Portal. This information is entered into the therapist's profile and is used for entering log notes and creating digital speech recommendations (for SLPs).

Therapists (My Account>My Profile)

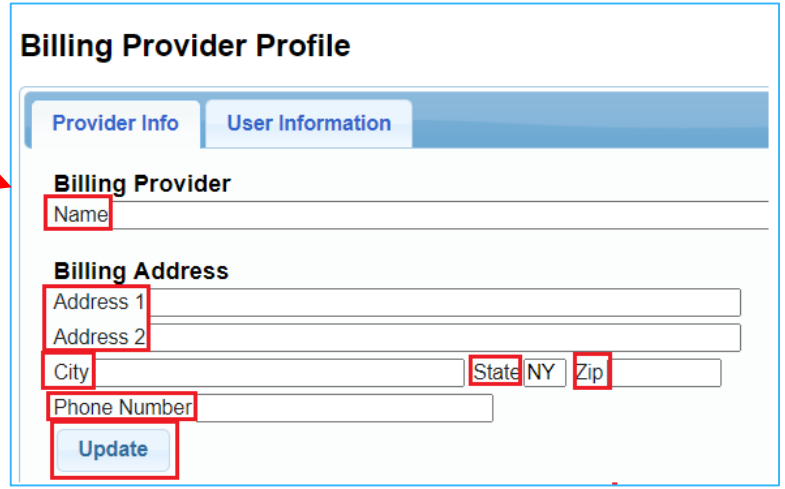
- Enter Therapist's Name
- Enter NPI & License Information
- Enter Provider contact information including complete address and phone number
- Complete the Signature Field
  - Signature Title and Credentials must be entered
  - Pin # must be set up



Portal Profiles – Billing Provider

There is a one-time set-up in the Portal that is required for agencies/independent providers in the Portal. The information entered into this billing profile is used for auto filling the therapist's contact information into digital speech recommendations.

- **Billing Provider*** (My Account>Billing Provider Profile)
  - Enter your complete Billing Address (street, city, state, zip)
  - Enter your Billing Phone Number (including area code)



** [If you are a therapist that has an independent vendor contract with the County and bill the County directly, you are a billing provider. If you are a therapist employed by an agency, then the agency is the billing provider.]*

Center-Based Related Service Billing

- The County must incur a cost for a Medicaid related service/evaluation in order to bill Medicaid.

- Since the cost of all Center-Based Related Services (CBRS) are included in the center-based tuition, the CBRS services (OT/PT/ST) must be vouchered separately through the Portal so Medicaid can be billed for these therapy sessions. The CBRS voucher should be completed at the same time as the center-based program.

- McGuinness will notify you if the CBRS billing is not completed/submitted in the Portal when the tuition program is vouchered.

Children & Enrollments
Creating "Unmatched Children & Enrollments"

- Service providers must maintain contemporaneous records. The child's official enrollment is not always entered into the Portal prior to the child's first session.
- There is a process in the Portal where a therapist can create an "unmatched child/enrollment" so session notes and prescriptions can be entered contemporaneously.
- These temporary placeholder enrollments will need to be matched to the official county record by the agency/provider. During this "matching" process all notes/documentation will move from the unmatched/temporary record to the official record and the temporary/unmatched record will be deleted.
- When unmatched enrollments are entered, please make sure a separate enrollment is created for each service line on the IEP and the enrollment matches the IEP mandate.
- The agency/provider should complete the matching process routinely.
- This process is detailed on Page 2 of the ***New Implementation Guide for Providers***.

Session Notes – Contemporaneous Signing

From the Medicaid Questions & Answers

Question #100:

What is the suggested time frame for completing contemporaneous session notes?

Answer:

"Contemporaneous" means occurring at or about the same period of time. Sessions should be documented as close to the conclusion of the session as practicable. [December 13, 2010]

Session Notes – Contemporaneous Signing (Continued)

From the Medicaid Questions & Answers

Question #25:

What must be included in a session note?

Answer:

Session notes must include:

- *Student's name*
- *Specific type of service provided*
- *Whether the service was provided individually or in a group (Specifically actual group size)*
- *The setting in which the service was rendered (school, clinic, other)*
- *Date and time the service was rendered*
- *Brief description of the students' progress made by receiving the service during the session*
- *Name, title, signature and credentials of the person furnishing the service*
- *Dated signature and credentials of supervising clinician as appropriate (signature date must be within **45 days** of the date of service).*

Credential Verification

- All licensed therapists "must" verify their credentials through the CPSE Portal before billing can be submitted.
- All licensed therapists "must" have an NPI number to bill through the Portal – even if they work under the direction of a supervising clinician.
- There is no cost to apply for an NPI number and usually takes 7-10 days. Applicants can use the following website to apply. https://nppes.cms.hhs.gov/NPPES

UNDER THE DIRECTION OF (UDO)

- To be Medicaid reimbursable, clinicians furnishing services must possess certain qualifications including NYS licensure, registration or certification as appropriate.

- For SSHSP purposes the UDO requirements apply to TSHH, TSSLD, CFY, PTA, OTA & COTA.

- UDO documentation must be completed and sent to the County that delineates that the **supervising clinician** has met with the **servicing provider** at the beginning of the service period. Until this meeting has occurred, Medicaid claiming will be disallowed. The initial meeting between the supervising and servicing provider is known as the Initial Face-to-Face visit.

- Any "provided sessions" that occur between the student and the servicing provider **prior** to the initial face-to-face visit should be marked as "**Not Medicaid-Eligible**" when the servicing provider completes their treatment logs in the Portal. The supervising provider should check to ensure that these sessions are marked as "**Not Medicaid-Eligible**" before co-signing.

CPSE Portal Knowledge Base For Medicaid

- As you may already know, you can find tutorials, articles and webinars in the CPSE Portal Knowledge Base.

- We have put all the Knowledge Base Links that are related to Medicaid into a table for quick reference, which you should have received as an attachment with the email from the County.

- The table of Knowledge Base Medicaid links can also be accessed using this link:
  http://support.cpseportal.com/kb/a231/medicaid-knowledge-base-links.aspx

CPSE Portal Knowledge Base For Medicaid - Continued

CPSE PORTAL MEDICAID KNOWLEDGE BASE

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

Knowledge Base Articles/Webinars	Description
Children & Enrollments	Therapists and agencies will use these articles to set up and manage temporary enrollments that are created by the therapist or agency. These temporary enrollments will be subsequently matched by the agency so that children can be serviced contemporaneously prior to the creation of the "official" enrollment.
Credential Verification & How to Apply for an NPI #.	In order to be compliant with Medicaid requirements, we need to make sure that therapists are up to date with their credentials. These articles will assist therapists and agencies as well as Portal users without a CPSE Portal login to manage their license and NPI information. Credentials must be verified before billing can be submitted in the Portal.
Lookup	Articles under Lookup will give you information regarding, children, enrollments, CPT/ICD, etc.
Medicaid New Implementation Guide (for providers)	This guide will help providers understand the requirements of Full-Service Medicaid with McGuinness.
Medicaid Compliance	We have put together many articles and webinars to help agencies and providers with Medicaid compliance. You will find the following items under this category: • a webinar and PowerPoint Presentation on Medicaid-Compliant Written Orders, • a prescription checklist detailing the valid verses invalid way to complete a Medicaid prescription, • a blank Medicaid-compliant prescription template and sample prescription template, and, • links to the Medicaid Provider Policy & Billing Handbook and the Medicaid Questions and Answers. These resources will be very helpful with your Medicaid-related responsibilities.
Medicaid Reports (for Documentation)	These reports will help you to determine the documentation that is "missing" *(consents, prescriptions, IEPs)* and as a result preventing Medicaid claiming.
Prescriptions	There are many articles related to prescriptions. You will find the following under this category: • "How To" Articles, • Articles that will help you with Medicaid compliance as it relates to prescriptions/verifications and, • Troubleshooting
Uploading Documentation	These articles will assist you with the processes required for uploading Consent Forms, IEPs and Prescriptions.
User Information	These articles will help you with getting started in the Portal. • Choosing a PIN #, • Entering your signature and credential information, and, • Initial set-up
Webinars	These links will bring you to various webinars.

CPSE PORTAL MEDICAID KNOWLEDGE BASE LINKS

New Implementation Guide for McGuinness Full-Service Medicaid (for Providers)
http://support.cpseportal.com/kb/a232/mcguinness-full-service-medicaid-new-implementation-guide-for-providers.aspx

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

ARTICLE / TUTORIAL / WEBINAR	LINK
CHILDREN & ENROLLMENTS	
Enrollments Added by County	http://support.cpseportal.com/kb/a182/enrollments-added-by-county-report.aspx
Entering Unmatched Children and Unmatched Enrollments	http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx
Matching Unmatched Children and Enrollments	http://support.cpseportal.com/kb/a175/matching-unmatched-children-and-enrollments.aspx
View Unmatched Enrollments	http://support.cpseportal.com/kb/a184/view-unmatched-enrollments.aspx
Editing an Unmatched Child	http://support.cpseportal.com/kb/a124/editing-an-unmatched-child.aspx
CREDENTIAL VERIFICATION	
Credential Verification Webinar	http://support.cpseportal.com/kb/a166/credential-verification.aspx
Credential Verification - Agencies	http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx
Credential Verification - Providers	http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx
Credential Verification – No Portal Login	http://support.cpseportal.com/kb/a151/credential-verification-no-cpse-portal-login.aspx
Service Provider Credential Verification Listing	http://support.cpseportal.com/kb/a224/credential-verification-listing-approval-listing-reports.aspx?KBSearchID=13730
Website to Apply for an NPI Number	https://nppes.cms.hhs.gov/NPPES
LOOK-UP	
How to look up a child by ESID #	http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid.aspx
MEDICAID COMPLIANCE	
Medicaid-Compliant Written Orders Webinar Recording	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx
Medicaid-Compliant Written Orders PowerPoint Presentation	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx
Medicaid-Compliant Written Orders Webinar Q & A	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx
Medicaid-Compliant Written Order Verification Checklist	http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx
Medicaid-Compliant Written Order - Sample	http://support.cpseportal.com/kb/a174/medicaid-compliant-written-order-sample-template.aspx
Medicaid-Compliant Written Order Blank Template	http://support.cpseportal.com/kb/a172/medicaid-compliant-prescription-template.aspx
Medicaid Provider Policy & Billing Handbook	http://www.oms.nysed.gov/medicaid/handbook/sshsp_handbook_9_march_21_2018_final.pdf
Medicaid Questions & Answers	http://www.oms.nysed.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf
MEDICAID REPORTS (FOR MISSING DOCUMENTATION)	
Missing Documents Preventing Claiming	http://support.cpseportal.com/kb/a191/missing-documents-preventing-claiming-report.aspx
Missing Parental Consents	http://support.cpseportal.com/kb/a99/missing-medicaid-parental-consents.aspx
Missing IEPs	http://support.cpseportal.com/kb/a186/missing-ieps-report.aspx
Missing Prescriptions	http://support.cpseportal.com/kb/a187/missing-prescriptions-report.aspx
PRESCRIPTIONS	
How to Create a Digital Speech Recommendation *(Entering Unmatched Children and Unmatched Enrollments may be required for this process.)*	http://support.cpseportal.com/kb/a163/creating-a-digital-speech-recommendation.aspx
Prescription Verification Checklist (for Medicaid)	http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx
Prescription Requirements for Medicaid	http://support.cpseportal.com/kb/a179/prescription-requirements.aspx
Uploading & Troubleshooting Prescription Documentation	http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=10123

One Drive – Secure File Storage

- One Drive is a secure file storage service that offers a simple way to store, sync and share various types of files with other people using any web browser from your computer, tablet or phone.
- McGuinness will use One Drive to send protected information so we can use the child's name and demographic information while staying compliant with HIPAA and FERPA.
- Any protected information will be sent to you using a secure link that will be delivered via email.
- You will most often receive lists for outstanding documentation through One Drive. The list will be delivered in an Excel-type spreadsheet as shown below.

Provider	District	ESID	Service	From Date	To Date	Need IEP	Need Consent	Need Script
	WANTAGH UFSD	RS1920W0162	PT	09/03/19	06/26/20	YES		

QUESTIONS?

At this point, we will answer any questions that have come in regarding what was previously covered.

Document Verification
What is required?

- In order to bill Medicaid, the County/McGuinness must have the following documentation, which will be uploaded by the provider to the Portal.

1) An **Individual Education Plan** (IEP) for each Medicaid related service enrollment (ESID) in the Portal

2) A signed/dated Medicaid-Compliant **Prescription**

Document Verification
Individual Education Plan (IEP)

- IEPs are not verified in their entirety as one document. Each service line on the IEP must be matched to a coordinating Portal enrollment (ESID) before it can be verified.

  (It is important that the Portal enrollments match each service line on the IEP.)

Portal Verification Screen

Child Name: DOB:

County: District: CIN:

Child's IEPs

School Year	Effective Date	Uploaded Date	Verified By	Verified Date		Invalidate
202021		08/04/20			Select	Invalidate
202021	07/06/20	08/04/20			Select	Invalidate
202021	09/10/20	08/04/20			Select	Invalidate

Verification

	Provider	ESID	From Date	To Date	Service
☐		CBRS2021S0025176	07/06/2020	08/14/2020	OT 2x30 Individual
☐		CBRS2021S0025177	07/06/2020	08/14/2020	ST 2x30 Individual

Effective Date: Verify

Uploaded IEP

IEP

Special Alerts:

IEP INFORMATION

Projected IEP Start Date:	07/06/2020
Projected IEP End Date:	06/25/2021
Projected Date of Annual Review:	06/25/2021
Projected Date for Reevaluation:	01/07/2022
Extended School Year:	Yes
Behavior Intervention Plan:	No
Supplementary Aids and Services:	No
Assistive Technology:	No
Supports for School Personnel:	No
Testing Accommodations:	No

SUMMARY-SPECIAL EDUCATION PROGRAMS AND RELATED SERVICES

Special Class: 12:1+4	09/10/2020 - 06/23/2021 1 x Daily, 5hr.
Speech/Language Therapy: Individual	09/10/2020 - 06/23/2021 2 x Weekly, 30min.
Occupational Therapy: Individual	09/10/2020 - 06/23/2021 2 x Weekly, 30min.
Special Class: 12:1+4	07/06/2020 - 08/14/2020 1 x Daily, 5hr.
Occupational Therapy: Individual	07/06/2020 - 08/14/2020 2 x Weekly, 30min.
Speech/Language Therapy: Individual	07/06/2020 - 08/14/2020 2 x Weekly, 30min.

Document Verification
Individual Education Plan (IEP) - Continued

- If the Portal enrollment and the IEP do not match "exactly" that particular Portal enrollment (ESID) will not be verified for Medicaid claiming.

- The following information will be reviewed during the verification process:
  - ✓ Child's **name**
  - ✓ Child's **date of birth**
  - ✓ Child's **school district**
  - ✓ Each **service line** (mandate) on the IEP should have a Portal enrollment where the **service, service dates, service frequency/duration and service setting (I/G) match.**
  - ✓ Each Medicaid-eligible related service enrollment (ESID) must have an IEP with a matching mandate that is uploaded to the Portal.

Document Verification
Prescription

- The agency or therapist will be responsible for obtaining and uploading the prescription/speech recommendation.

- It is important to note that the therapist/agency **must have a copy of the prescription "in hand"** before providing the service. The district will not be uploading the prescription.

Document Verification
Prescription - Continued

- **What is McGuinness looking for when they verify a prescription?**

  The Medicaid Provider Policy & Billing Handbook (page 21) lists (8) eight elements that are required on a Medicaid prescription.

1. The complete **name** of the child
2. The **complete date** the order was written and signed *(MM/DD/YY)*
3. The **service(s)** being ordered *(OT/PT/ST)*

   Frequency/duration of the ordered service must be either specified on the order itself *(2x30 I)*

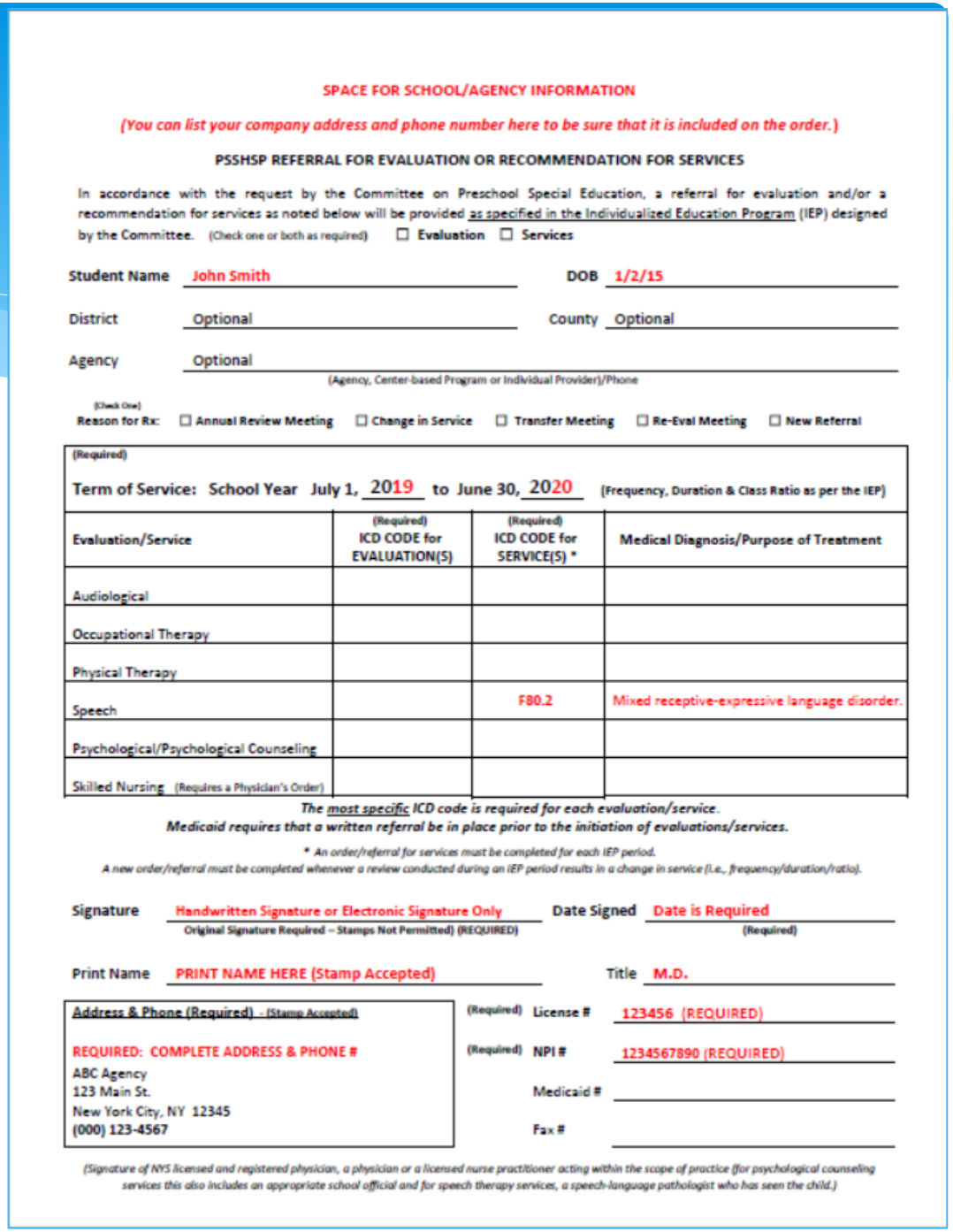
   ** **OR** **

   The order can explicitly adopt the frequency/duration of the service by **IEP reference** *(As per IEP)*
4. Ordering **provider's contact information** *(Street, City, State, Zip, Phone – Including Area Code.)*
5. **Signature** of the ordering practitioner *(Stamps are not permitted; including computer-generated signatures)*
6. The **time period** for which the services are being ordered *(Specific Dates 7/1/xx-6/30/xx -**or**- School Year 2020-2021)*
7. The ordering practitioners **NPI and/or license number**
8. Patient **diagnosis** and/or reason/need for ordered service(s) *(ICD Code)*

Customizable Medicaid-Compliant Prescription Template

Available through the CPSE Portal Knowledge Base

Link to Knowledge Base Customizable Medicaid-Compliant Prescription Template:
http://support.cpseportal.com/kb/a172/medicaid-compliant-prescription-template.aspx



SPACE FOR SCHOOL/AGENCY INFORMATION

(You can list your company address and phone number here to be sure that it is included on the order.)

PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

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

Student Name John Smith DOB 1/2/15

District Optional County Optional

Agency Optional

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

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

(Required)

Term of Service: School Year July 1, 2019 to June 30, 2020 (Frequency, Duration & Class Ratio as per the IEP)

Evaluation/Service	(Required) ICD CODE for EVALUATION(S)	(Required) ICD CODE for SERVICE(S) *	Medical Diagnosis/Purpose of Treatment
Audiological			
Occupational Therapy			
Physical Therapy			
Speech		F80.2	Mixed receptive-expressive language disorder.
Psychological/Psychological Counseling			
Skilled Nursing (Requires a Physician's Order)			

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

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

Signature Handwritten Signature or Electronic Signature Only (Original Signature Required – Stamps Not Permitted) (REQUIRED) Date Signed Date is Required (Required)

Print Name PRINT NAME HERE (Stamp Accepted) Title M.D.

Address & Phone (Required) - (Stamp Accepted)

REQUIRED: COMPLETE ADDRESS & PHONE #
ABC Agency
123 Main St.
New York City, NY 12345
(000) 123-4567

(Required) License # 123456 (REQUIRED)

(Required) NPI # 1234567890 (REQUIRED)

Medicaid #

Fax #

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

Document Verification
Prescription - Continued

❑When is a new prescription required?

The Medicaid Provider Policy & Billing Handbook (page 22), Life of a Written Order, describes when a new prescription is required.

- ✓ New Referrals (Newly-identified students)
- ✓ Each IEP period (Annual Review)
- ✓ Change of Service (frequency/duration/I-G – *even for a decrease in service*)
- ✓ Child transfers to another school district

***New Referrals *Annual Review *Change in Services *Transfer * Re-Eval Meeting**

❑The Portal Knowledge Base has a Medicaid-compliant customizable prescription template for providers. (http://support.cpseportal.com/kb/a172/medicaid-compliant-prescription-template.aspx)

Non-Compliant & Outstanding Medicaid Documentation

- **Non-Compliant Documentation**: If uploaded documentation does not meet Medicaid requirements, your agency will receive notification from McGuinness regarding what is required to ensure Medicaid claiming.

- **Outstanding Documentation**: Several times throughout the school year you will be contacted by McGuinness with a request for "missing" documentation that is required for claiming. Please respond to this notification at your earliest convenience to ensure that Medicaid claims are processed within the limited claiming window.

** Uploading Medicaid Documentation **

- Providers will be expected to upload IEPs and prescriptions to the Portal so McGuinness can verify that all the requirements are in place for Medicaid claiming. A simple upload process will be followed for each document type *(IEPs & Prescriptions)*.

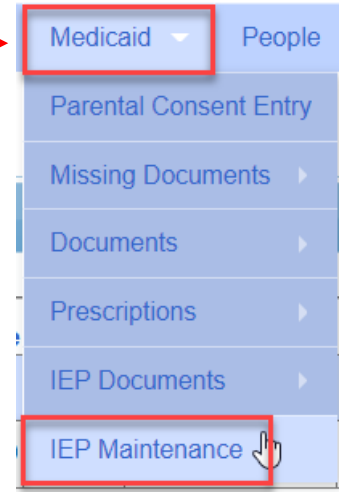
- IMPORTANT: Dutchess County will be expecting providers to upload Medicaid documentation back to **7/1/20** (Summer Session).

- Let's take a look at what each upload process looks like.

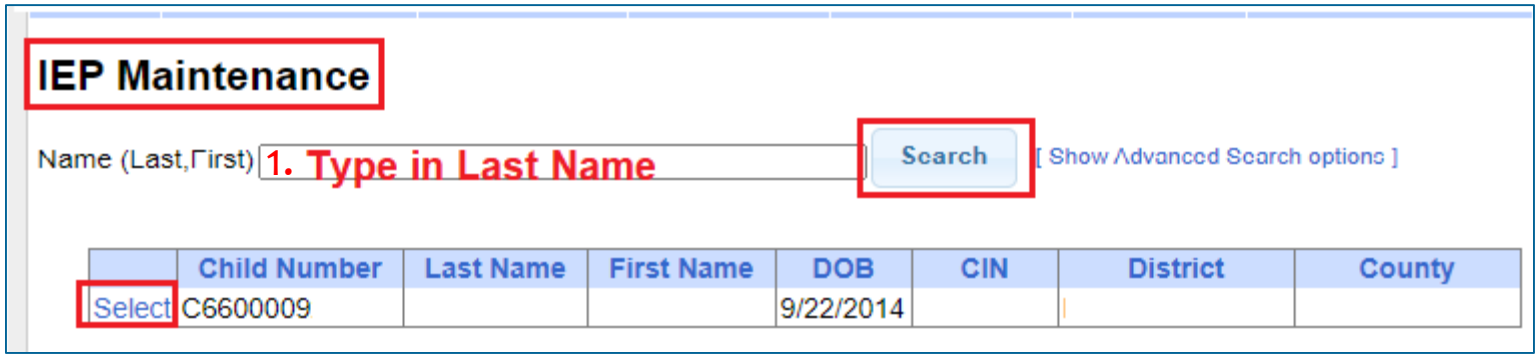
How to Upload an IEP

Before an IEP can be uploaded, it must be scanned to your computer (desktop).

Go to Medicaid>IEP Maintenance



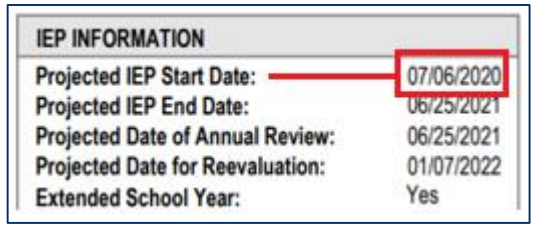
1. Type in the **Name of the Child>SEARCH>**Click **SELECT**



How to Upload an IEP (Continued)

2. Select the **School Year**

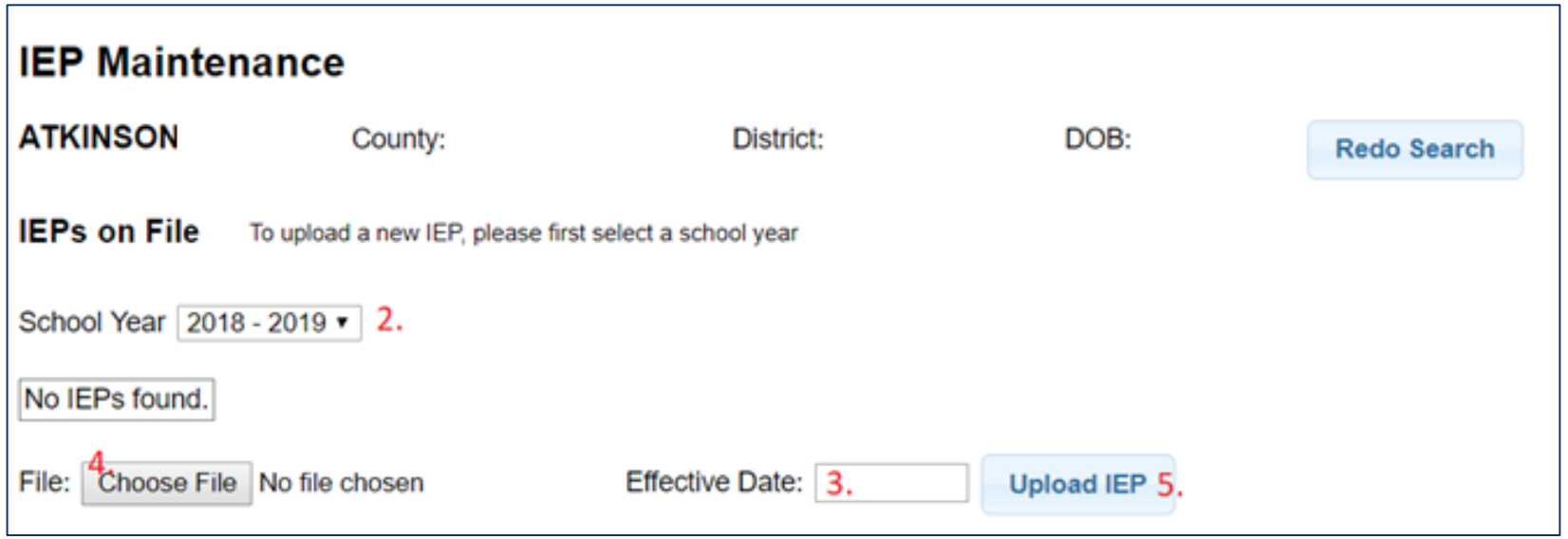
3. Enter **Effective Date**
(Start Date of Service)



4. **Choose File**
(Browse to where the Rx is saved on your computer)

5. Click **Upload IEP**

If a student attended the summer session, an IEP must be uploaded that includes the summer services.



How to Upload a Prescription
(Two Options)

Option 1: **Hard Copy Paper Upload Process**

Option 2: Digital Speech Recommendation (for SLPs only)

This process will be addressed in a separate webinar.

How to Upload a Paper Prescription

- Before you can upload a prescription to the Portal you must scan and save the prescription to your computer (Desktop).
- You can upload a prescription from two different menus in the Portal:

1. **Caseload Maintenance>Prescriptions for Caseload*** (for Therapists)

2. **Medicaid>Prescriptions>Prescription Entry Maintenance*** (for Billing Admins)

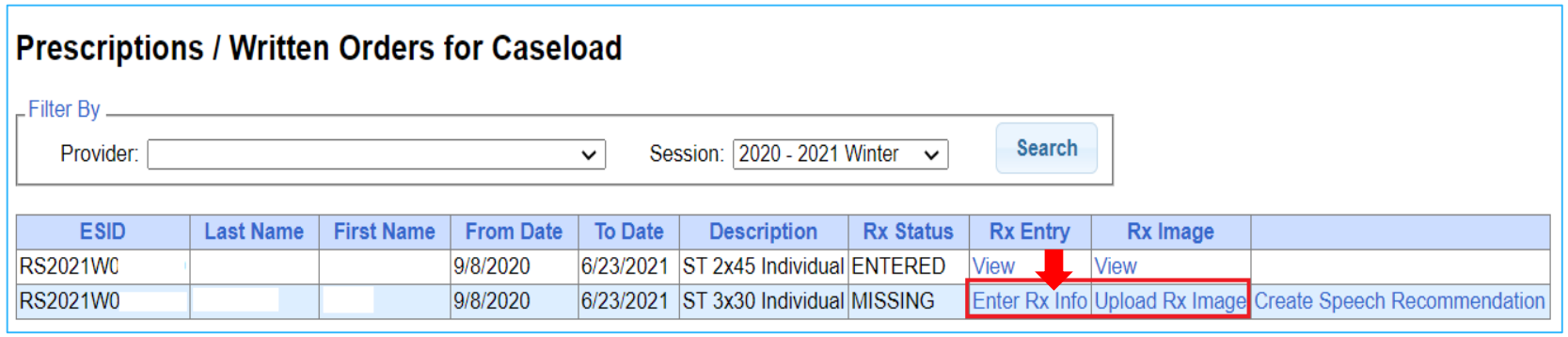
* **Important Note Regarding Prescriptions:** Beginning with a **September 1, 2020** service date, providers will not be able to submit a voucher in the Portal until a prescription has been uploaded.

How to Upload a Paper Prescription (Step 1 – Prescription Entry - Therapists)

Before an Rx can be uploaded, it must be scanned to your computer (desktop).

- Go to **Caseload Maintenance>Prescriptions for Caseload** (for therapists)

- **Step 1 – Enter Prescription Details**
- Click on ***Enter Rx Info*** Link

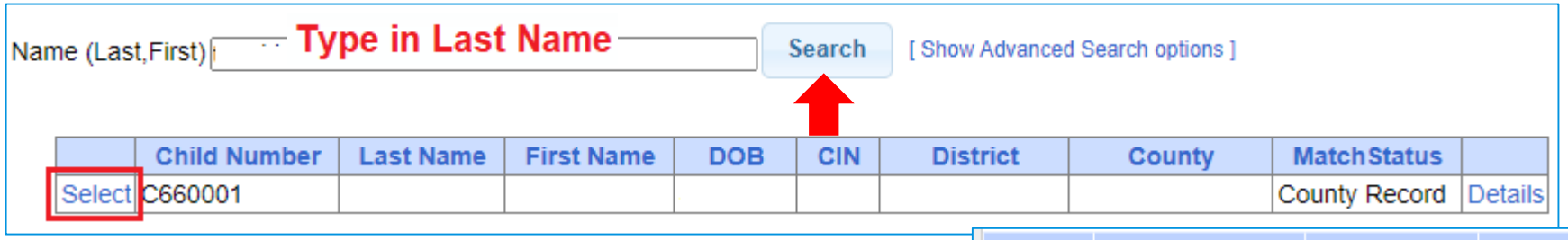


How to Upload a Paper Prescription (Step 1 - Prescription Entry - Admins)

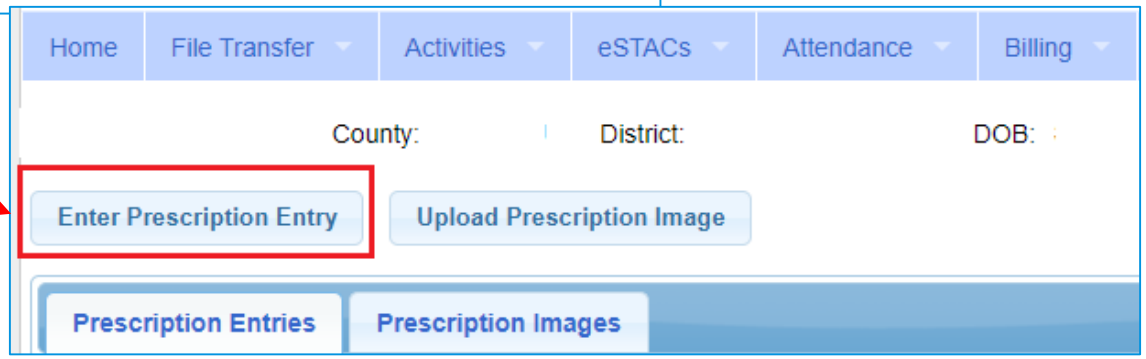
Before an Rx can be uploaded, it must be scanned to your computer (desktop).

- Go to **Medicaid>Prescriptions>Prescription Entry Maintenance**

- Type in the child's **Last Name** into the Search Box>**SEARCH**
- Click **SELECT**

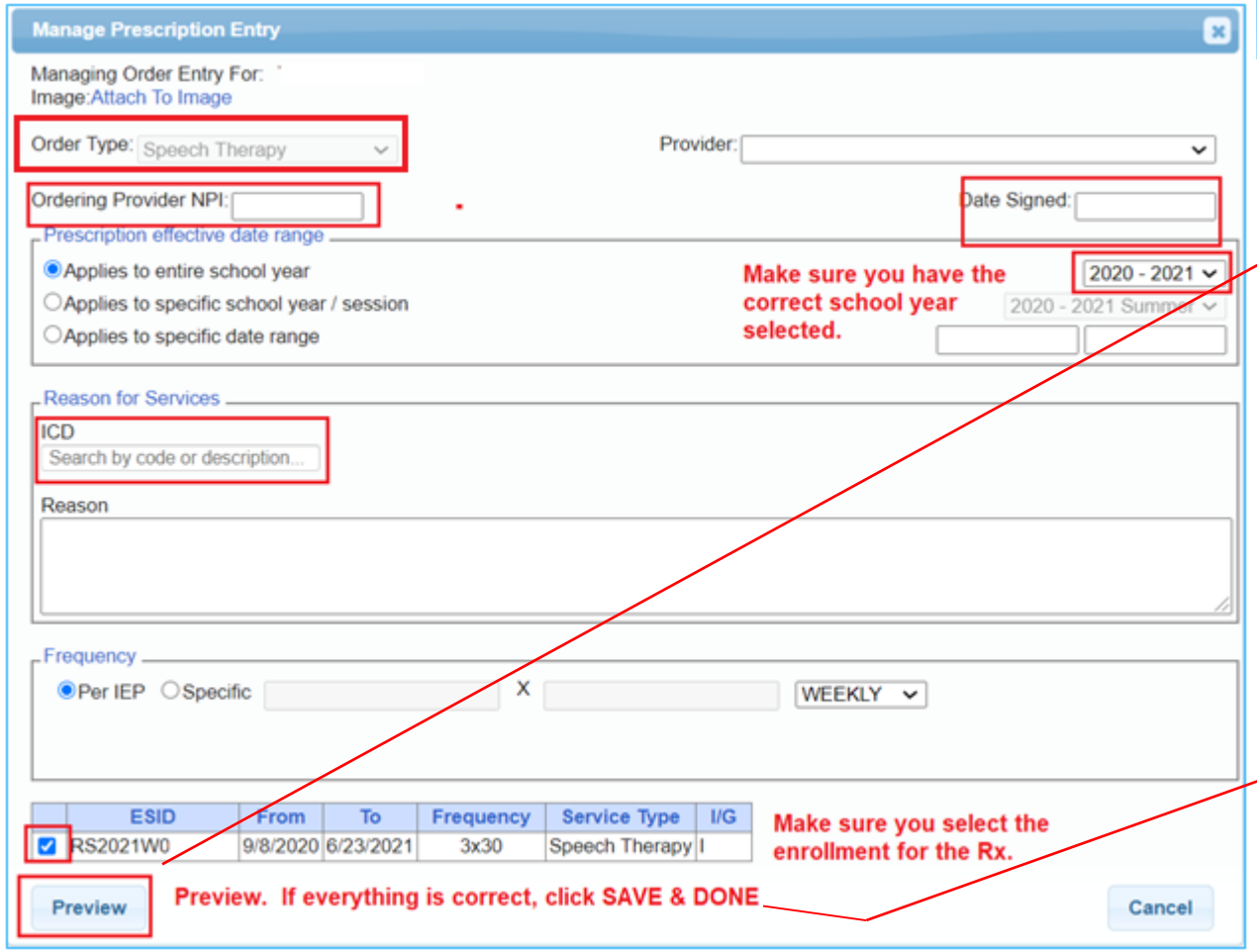


- **Step 1 – Enter Prescription Details**
- Click on **ENTER PRESCRIPTION ENTRY**



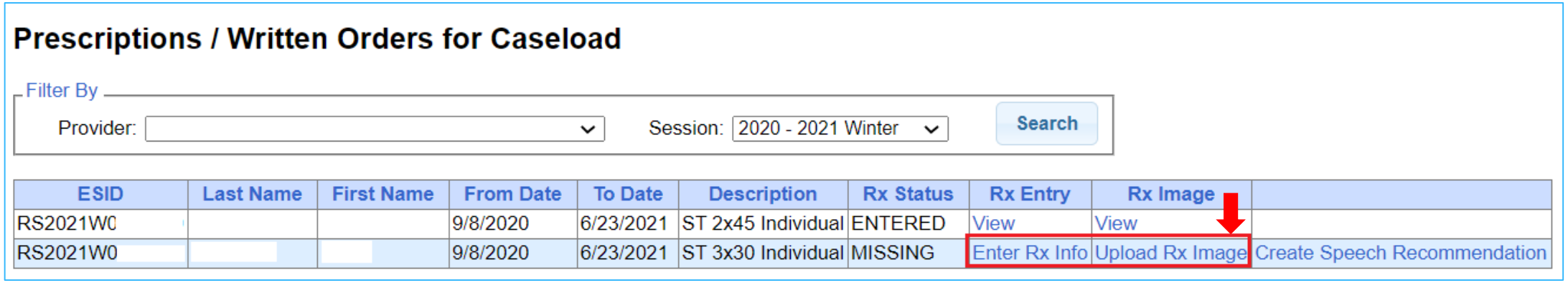
How to Upload a Paper Prescription (Prescription Entry - Therapists & Admins)

1. Select **Order Type**
2. **NPI**
3. **Date Signed**
4. Date Range
5. **School Year**
6. **ICD**
7. Frequency
8. **Select Enrollment**
9. Click **Preview**
10. Click **Save & Done**



How to Upload a Paper Prescription (Step 2 – Image Entry - Therapists)

- **Step 2 – Upload Prescription Image & Enter Image Details.**
- Click on ***Upload Rx Image*** Link (From Caseload Maintenance>Prescription for Caseload)



Prescriptions / Written Orders for Caseload

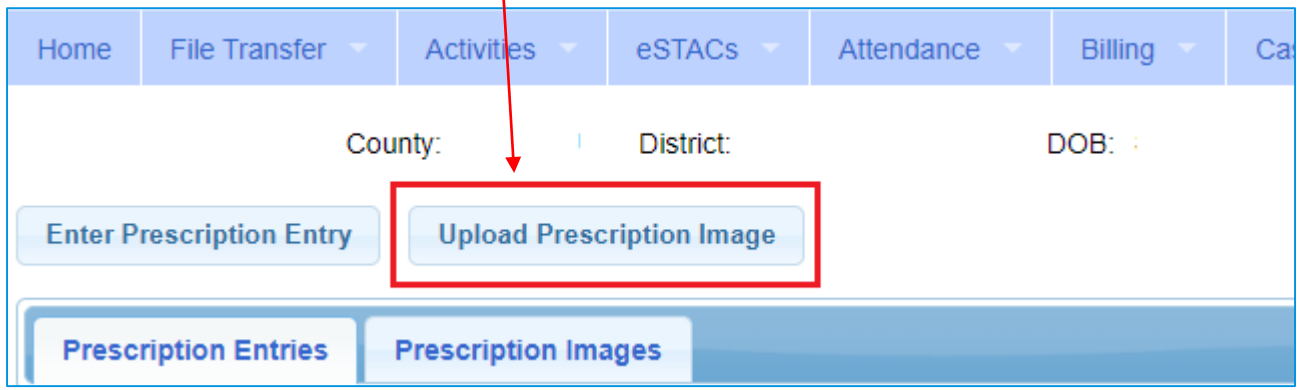
Filter By

Provider: Session: 2020 - 2021 Winter Search

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
RS2021W0			9/8/2020	6/23/2021	ST 2x45 Individual	ENTERED	View	View	
RS2021W0			9/8/2020	6/23/2021	ST 3x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

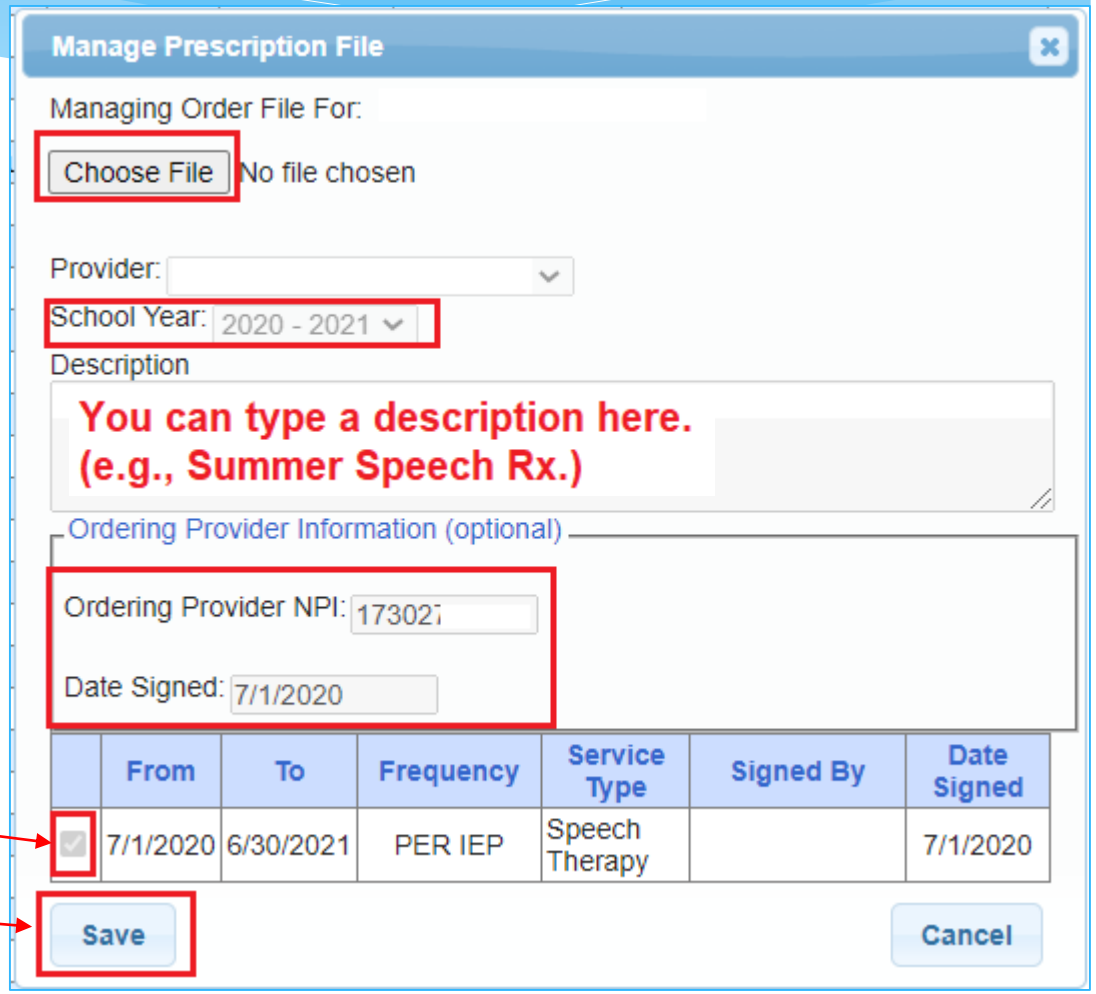
How to Upload a Paper Prescription (Step 2 – Image Entry - Admins)

- **Step 2 – Upload Prescription Image & Enter Image Details**
- Click on **UPLOAD PRESCRIPTION IMAGE** (from Medicaid>Prescriptions> Prescription Entry Maintenance)



How to Upload a Paper Prescription Image Entry – (Therapists & Admins)

1. **Choose File** and browse to the Rx image on your computer.
2. Fill in the **school year**.
3. Optional – You can type in a description.
4. Fill in your **NPI #.**
5. Fill in the **signature date** of the Rx.
6. Check the **eligible order**.
7. Click **Save**



How do you know if you completed your Rx? (For Therapists – Prescriptions for Caseload)

- How do you know if you successfully completed your prescription?

The **Rx Status Column** on the **Prescriptions for Caseload** screen will let you know whether the prescription has been **Entered, Verified, Missing* or Invalidated**. If invalidated, you will see the reason why it has been invalidated.

** If the prescription was not entered correctly, the status will show as "missing."*

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	ENTERED	View	View	
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	INVALIDATED: Computer-generated signature stamp used.	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

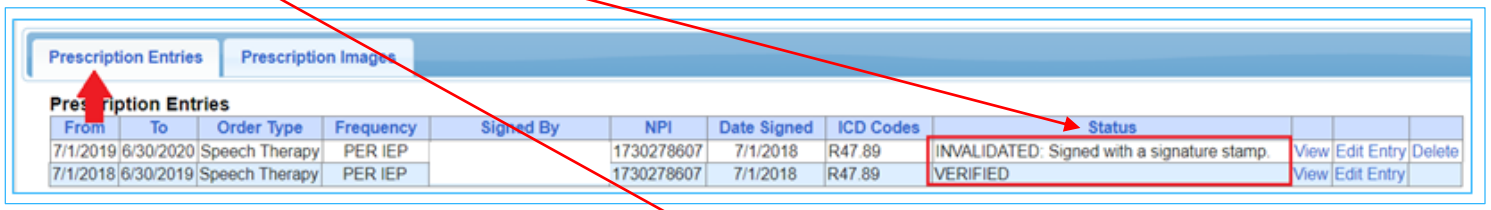
The link will change to "**View**" when the Rx has been successfully uploaded.

How do you know if you completed your Rx? (For Admins – Prescription Entry Maintenance)

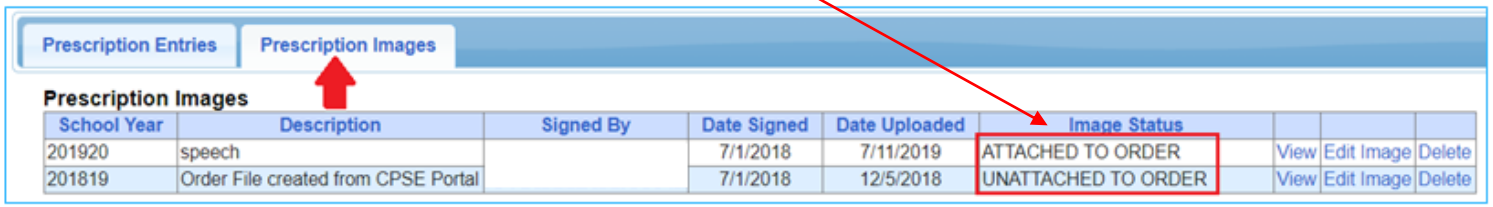
- How do you know if you successfully completed your prescription?
  - There are two tabs on the **Prescription Entry Maintenance Screen**
    1) Prescription **Entries**, and
    2) Prescription **Images**

    Each tab has a "**Status**" column

  - The Prescription Entries Tab will show you whether the prescription was **Entered, Verified, Invalidated** or **Missing**.

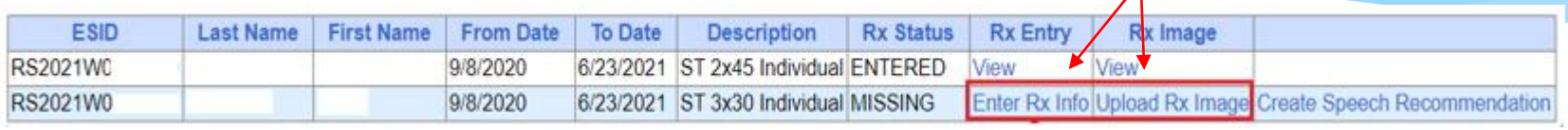


  - The Prescription Images Tab will show you whether the image is "**Attached**" or "**Unattached**" to the Prescription Image.



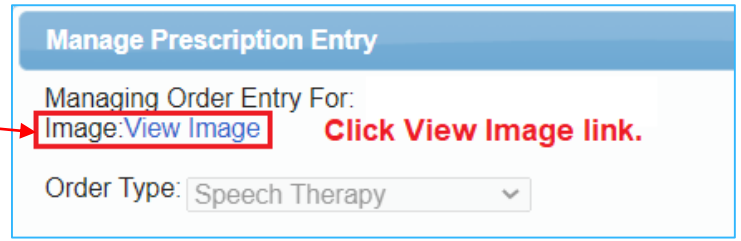
How to print Prescription from Prescriptions for Caseload - (Therapists)

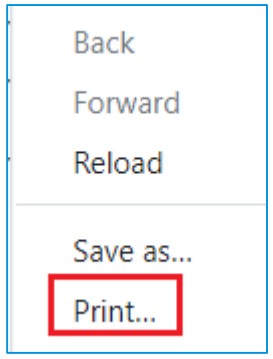
- Click the "**View**" link in either the **Rx Entry** or **Rx Image** column.



ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
RS2021W0			9/8/2020	6/23/2021	ST 2x45 Individual	ENTERED	View	View	
RS2021W0			9/8/2020	6/23/2021	ST 3x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

- From the **Rx Entry** column, click "**View.**"
- Click the "**View Image**" link.
- Right Click>**Print**



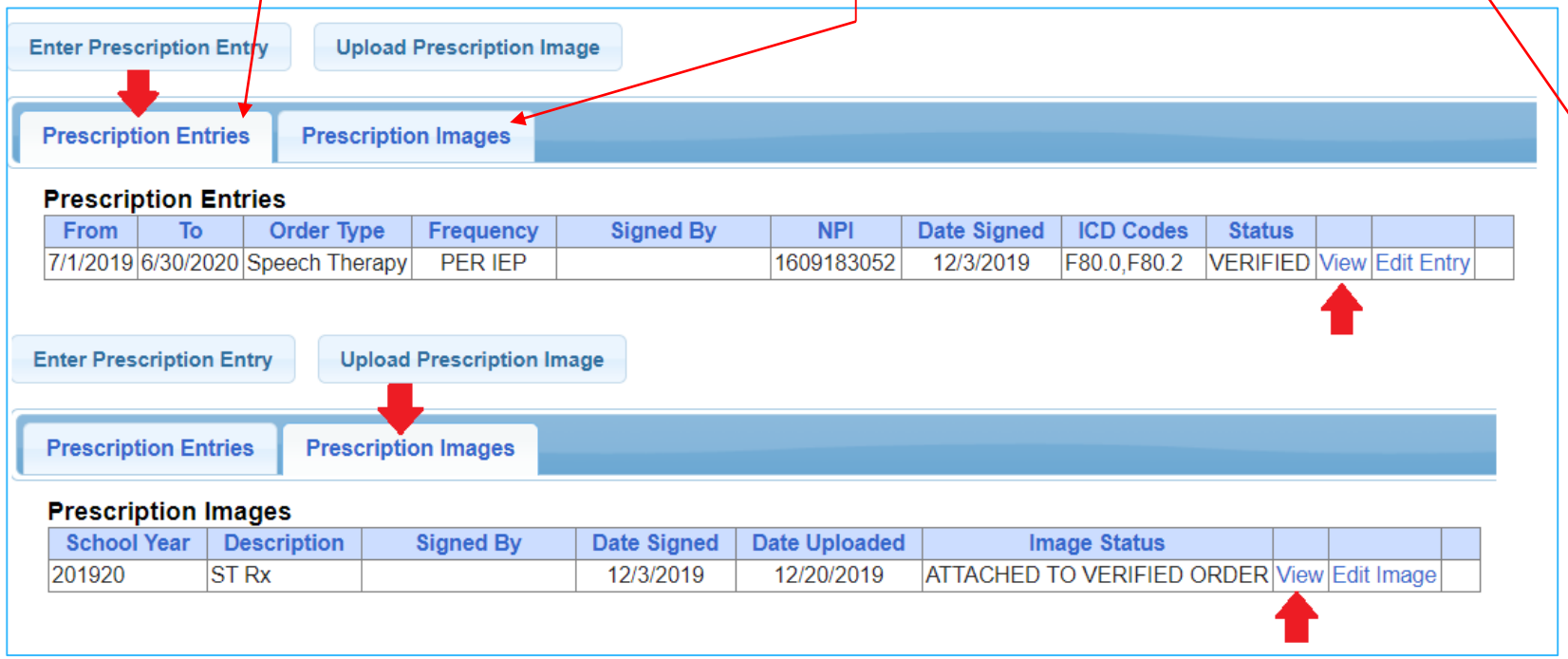


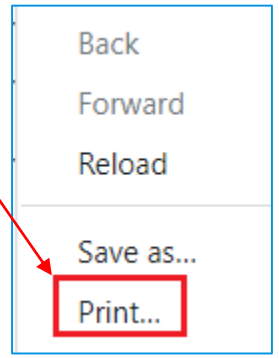
**** OR ****

- From the **Rx Image** column, click "**View.**"
- Click the "**View Order File**" link.
- Right Click>**Print**

How to print the Prescription from Prescription Entry Maintenance - (Admins)

- Click on the **Prescription Entries** or **Prescription Images** Tab. Click the "View" Link. The Rx image will appear. Right click on the Rx image and click **Print.**





TROUBLESHOOTING (Prescription Uploading)

- The following issues will prevent you from completing your prescription successfully.
  - ✓ **Prescription Entry Details were not completed and/or saved** (Preview/Save & Done).
  - ✓ The **enrollment that applies to the Rx was not selected** on the Prescription **Entry** Details Screen.
  - ✓ **Prescription Image was not uploaded** or was uploaded and **not attached to the Prescription Details** Screen.
  - ✓ The **Eligible Orders** on the **Image** Details Screen was **not selected**.
  - ✓ The **correct school year** was not selected so the correct ESID # is not associated with the prescription.
  - ✓ The **prescription was invalidated** because one of the eight mandated criteria did not meet Medicaid requirements. As a result, billing cannot move forward.
  - ✓ All the items noted above will result in the following error message,

    "Details of Prescription/order not entered for enrollment."

Questions?

We will answer any questions regarding uploading documentation.

Additional Webinars – Save the Date

- Our next webinar training will focus on uploading documentation, adding temporary enrollments and running reports that will show you what documents are "missing" and required for claiming. We will show you these features using the Portal Training Database so we can walk you through these processes "live."

  This presentation is scheduled for **Tuesday, September 22nd at 2:30** and again on **Thursday, September 24th at 10:30**. Save the date.

- In November we will be hosting two additional webinars, which will assist you with the upcoming annual review period.
  1. Digital Speech Recommendations (for SLPs)
  2. Medicaid-Compliant Written Orders

  Someone from the County will be sending out the registration links for these presentations.

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- **Lisa Mell**, McGuinness Consultant – lmell@jmcguinness.com – Extension #34

Medicaid References

- Medicaid Provider Policy & Billing Handbook (Update 9)
  http://www.oms.nysed.gov/medicaid/handbook/

- Questions & Answers
  http://www.oms.nysed.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf

Follow-up

- This presentation will be recorded and the PowerPoint presentation will be uploaded to the Portal Knowledge Base for future reference.
  - Search for help in our Knowledge Base: http://support.cpseportal.com/Main/Default.aspx
  - Email: support@CPSEPortal.com
  - Questions/Guidance regarding Medicaid compliance: **Contact Deborah Frank – dfrank@jmcguinness.com, 518-393-3635, Ext. #41**

- **HELPFUL LINKS**

  CPSE Portal Knowledge Base Links for Medicaid

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