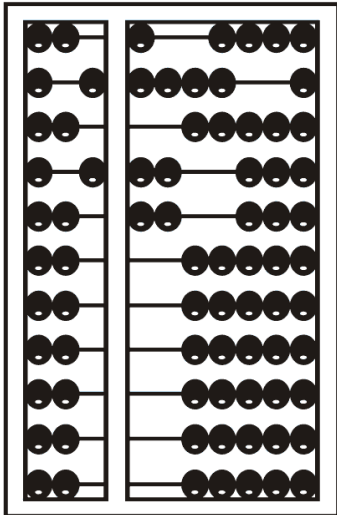


JAMES MCGUINNESS
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Consultants



UPLOADING MEDICAID DOCUMENTATION (Live Training)

Topics Covered

☐ **Entering Temporary Children & Enrollments**

- ✓ Creating “Unmatched Children & Enrollments”
- ✓ Matching “Unmatched Children & Enrollments”

☐ **Uploading Medicaid Documentation**

- ✓ Documentation should be uploaded to include the summer session – 7/1/20
- ✓ Documentation Requirements
- ✓ Uploading Medicaid Documentation
- ✓ Printing & Troubleshooting Medicaid Documentation

☐ **Reports**

- ✓ Outstanding Documentation Reports

☐ **McGuinness Medicaid-in-Education Contact Information**

☐ **Medicaid References**

Entering Temporary Children & Enrollments

- ❑ A child's "official" enrollment is not always created prior to the first day of a school session. Until the "official" enrollment is created providers can create an "Unmatched Child" and an "Unmatched Enrollment."
- ❑ These "unmatched" records are temporary placeholders; they exist so that providers can complete session notes and upload Medicaid documentation contemporaneously.
- ❑ Let's take a look at this process.

1. Add the “Unmatched Child” first. Once the unmatched child is created, you will be able to create the unmatched enrollment.

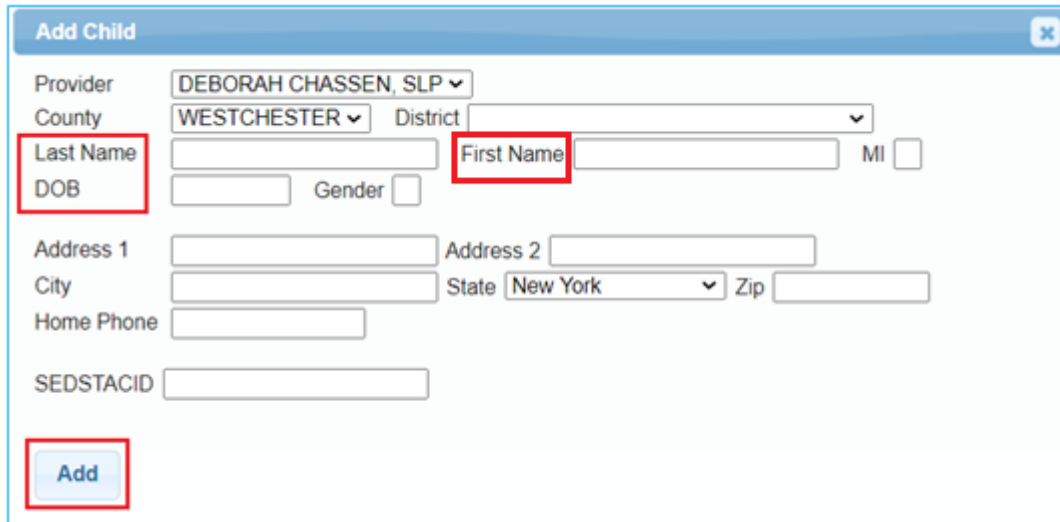
- Unmatched Children

Add Child

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
C				11/10/2015					NY			Enrollments	Attempt Match	Edit	Delete
C				10/19/2016					NY			Enrollments	Attempt Match	Edit	Delete
C				1/18/2014					NY			Enrollments	Attempt Match	Edit	Delete
C				3/11/2016					NY			Enrollments	Attempt Match	Edit	Delete

Entering Temporary Children & Enrollments (Continued)

- Fill in the as much information as you have; however, you can create the record with as little as the county, child's name and DOB.
- After you click **ADD**, the unmatched child record is created.



The screenshot shows a web form titled "Add Child" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Provider:** A dropdown menu with "DEBORAH CHASSEN, SLP" selected.
- County:** A dropdown menu with "WESTCHESTER" selected.
- District:** A dropdown menu.
- Last Name:** A text input field, highlighted with a red box.
- First Name:** A text input field, highlighted with a red box.
- MI:** A small text input field for middle initials.
- DOB:** A text input field for date of birth, highlighted with a red box.
- Gender:** A radio button.
- Address 1:** A text input field.
- Address 2:** A text input field.
- City:** A text input field.
- State:** A dropdown menu with "New York" selected.
- Zip:** A text input field.
- Home Phone:** A text input field.
- SEDSTACID:** A text input field.
- Add:** A button at the bottom left, highlighted with a red box.

Editing an Unmatched Child

- ❑ After you click Edit, the following screen will allow you to edit the unmatched child. Edit [only] the field(s) that are incorrect and click **Update** at the end of the row.

Unmatched Children Add Child

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone			
C6600015	<input type="text"/>	<input type="text"/>		<input type="text" value="11/10/2015"/>		<input type="text" value="v"/>			NY		<input type="text"/>	Enrollments	Attempt Match	<div><div>Update</div><div>Cancel</div></div>

Matching an Unmatched Child

❑ Go to **Caseload Maintenance>Unmatched Children**

❑ Click **Attempt Match**

Unmatched Children

Add Child

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
C6600015				11/10/2015					NY			Enrollments	Attempt Match	Edit	Delete
C6600015				10/19/2016					NY			Enrollments	Attempt Match	Edit	Delete
C6600007				1/18/2014					NY			Enrollments	Attempt Match	Edit	Delete
C6600015				3/11/2016					NY			Enrollments	Attempt Match	Edit	Delete

Matching an Unmatched Child

- ❑ After you click Attempt Match, potential matches will appear on the screen.
- ❑ Click **Select** next to the correct child to match.

Match Child Against County-Imported Child

Current Unmatched Child:
MEN County: District: DOB: 10/19/2016

Potential Matches:
Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	MEN	KA		10/19/2016					NY		

The Current Unmatched Child should match the Potential Match.

Matching an Unmatched Child

- ❑ After you click Select, the following screen will appear. If both entries match, you will click **Match!**

Match Child Against County-Imported Child

Current Unmatched Child:
MEI County: District: DOB: 10/19/2016

Potential Matches:
Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	MEN	KA		10/19/2016					NY		

Name of Child

WARNING: By clicking the button below, you are combining these two children (including any associated data – not limited to: enrollments, attendances, medicaid consents, medicaid eligibility, IEPs, log notes, scripts/orders). Make sure the match is correct. This cannot be undone.

ME (10/19/2016) → ME (10/19/2016)

Match!

If the name and DOB are the same for both, you can click Match!

The Current Unmatched Child should match the Potential Match.

Entering Temporary Children & Enrollments (Continued)

2. Now that the “unmatched child” has been successfully created, you will be able to create the **“unmatched enrollment.”**

■ Go to **Caseload Maintenance>Add/Edit Unmatched Enrollment**

■ From the drop-down select

- ✓ Session
- ✓ From/To Dates
- ✓ Enrollment Type (RS)
- ✓ RS Type (OT/PT/ST)
- ✓ I/G
- ✓ Units/Minutes (2x30)
- ✓ Timespan (Weekly)
- ✓ Click **ADD**

Home File Transfer Activities eSTACs Attendance Billing Caseload Maintenance Lookup Documents Reports Medicaid

Unmatched Enrollments

County: District: DOB: Redo Search

Fill in the session, enrollment start and end dates, Enrollment type, RS Type, I/G, frequency, duration, timespan>Click Add

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan	
	Select Session	Enr. Start	Enr. End	RS	OT/PT/SP		2	30	Weekly	Add

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- The unmatched enrollment has now been added.
- You can now use this temporary enrollment to enter your session notes and upload documentation.

Matching an Unmatched Enrollment

❑ Go to **Caseload Maintenance>Add Edit Unmatched Enrollments**

❑ Click **Attempt Enrollment Match**

Unmatched Enrollments													
School Year		All School Years ▼		Retrieve									
County	Child Number	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description			
	C66000075			01/18/14	201718	09/05/17	06/22/18	RS	ST	2x30	Attendances	Attempt Child Match	Delete
	C66000141			05/08/15	202021	07/06/20	08/14/20	RS	ST	2x30	Attendances		Delete
	C66000138			09/06/16	202021	09/08/20	06/25/21	RS	ST	1x30	Attendances	Attempt Enrollment Match	Delete
	C66000138			09/06/16	202021	09/08/20	06/25/21	RS	ST	1x30	Attendances	Attempt Enrollment Match	Delete

Matching an Unmatched Enrollment (Continued)

- ❑ After you click **Attempt Enrollment Match**, the following screen will appear.
- ❑ Click **Select** for the correct enrollment.

Match Enrollment Against County-Imported Enrollment

Child:
TO County: District: DOB: **9/6/2016**

Current Unmatched Enrollment:
Session: **2020 - 2021 Winter** From Date: **9/8/2020** To Date: **6/25/2021**
Enrollment Type: **RS** Service Type: **ST** Individual or Group: **I** Frequency: **1x30**

Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2020 - 2021 Winter	9/8/2020	6/25/2021	I	1x60	RS2021W0184470
Select	RS	ST	2020 - 2021 Winter	9/8/2020	6/25/2021	I	1x30	RS2021W0184471

Matching an Unmatched Enrollment

- ❑ After you click **Select**, the following screen will appear.
- ❑ If the unmatched enrollment criteria (on left – 9/8/20 – 6/25/21 1x30) matches the enrollment criteria (on right 9/8/20 – 6/25/21 1x30), you can click **Match!**.

Match Enrollment Against County-Imported Enrollment

Child: **TO** County: District: DOB: 9/6/2016

Current Unmatched Enrollment:
Session: 2020 - 2021 Winter From Date: 9/8/2020 To Date: 6/25/2021
Enrollment Type: RS Service Type: ST Individual or Group: I Frequency: 1x30

Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2020 - 2021 Winter	9/8/2020	6/25/2021	I	1x60	RS2021W0184470
Select	RS	ST	2020 - 2021 Winter	9/8/2020	6/25/2021	I	1x30	RS2021W0184471

WARNING: By clicking the button below, you are combining these two enrollments (including any associated data - not limited to: attendances, orders/scripts, log notes, therapist/provider assignments). Make sure the match is correct. This cannot be undone.

UNMATCHED ENROLLMENT
(9/8/2020 - 6/25/2021)
1x30

RS2021W0184471
(9/8/2020 - 6/25/2021)
1x30

Match!

Enrollment Criteria under Current Unmatched Enrollment should match what is shown at the bottom of the screen.

Medicaid Documentation Requirements / Uploading

- ❑ There is a simple upload process for each document type.
 - IEPs
 - Prescriptions (Paper Upload Process)
- ❑ Let's take a look at what each upload process looks like.
- ❑ **IMPORTANT:** Dutchess County will be expecting providers to upload Medicaid documentation back to **7/1/20** (Summer Session).

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**

IEP Maintenance

Name (Last,First) [Show Advanced Search options]

	Child Number	Last Name	First Name	DOB	CIN	District	County
<input type="button" value="Select"/>	C6600009			9/22/2014			

How to Upload an IEP (Continued)

After you click **SELECT**, the following screen appears:

2. Select the School Year

(From the IEP)

3. Enter Effective Date

(Start Date of Service)

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

4. Choose File

(Browse to where the Rx is saved on your computer)

5. Click Upload IEP

IEP Maintenance

ATKINSON County: District: DOB: Redo Search

IEPs on File To upload a new IEP, please first select a school year

School Year 2018 - 2019 ▼ 2.

No IEPs found.

File: 4. Choose File No file chosen Effective Date: 3. Upload IEP 5.

How to Upload a Prescription

(Two Options)

Option 1: Hard Copy Paper Upload Process

Option 2: Digital Speech Recommendation (for SLPs only)

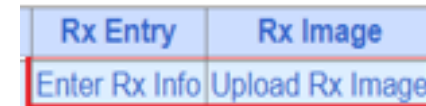
This process will be addressed in a separate webinar for SLPs.

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 three different menus in the Portal:

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



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

3. **Lookup>Child Lookup>Written Orders Tab*** (for Single Entry)

Upload Prescription Entry

Upload Prescription Image

* All options above will bring you to the same screen(s) to the prescription Entry and prescription image.

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

If a prescription is not uploaded, you will receive an error when submitting a voucher, **“Details of Prescription/order not entered for enrollment.”**

How to Upload a Paper Prescription (For 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

Prescriptions / Written Orders for Caseload

Filter By _____

Provider: Session: 2020 - 2021 Winter

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
RS2021WC			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



- Fill in the items marked in **red** on the **Rx Info** screen (next slide).

How to Upload a Paper Prescription (For Therapists - Continued)

This Prescription Entry Screen can be accessed using all three menu options.

1. NPI
2. Date Signed
3. School Year
4. ICD
5. Frequency
6. Enrollment
7. Preview
8. Save & Done

Manage Prescription Entry

Managing Order Entry For:
Image: [Attach To Image](#)

Order Type: Speech Therapy ▼ Provider: ▼

Ordering Provider NPI: Date Signed:

Prescription effective date range

☒ Applies to entire school year
☐ Applies to specific school year / session
☐ Applies to specific date range

Make sure you have the correct school year selected. 2020 - 2021 ▼

Reason for Services

ICD Search by code or description...

Reason

Frequency

☒ Per IEP ☐ Specific X WEEKLY ▼

ESID	From	To	Frequency	Service Type	I/G
<input checked="" type="checkbox"/> RS2021W0	9/8/2020	6/23/2021	3x30	Speech Therapy	I

[Preview](#)

Manage Prescription Preview

Preview

Child:

Service: Speech Therapy

Dates Covered: 7/1/2020 - 6/30/2021

Frequency: Per IEP

Reason:

ICD Code(s)	ICD Code	Description
	F84.0	Autistic disorder

Ordered By

Name:

NPI: 1992821

Date Signed: 8/6/20

[Save & Done](#) [Cancel](#)

Make sure you select the enrollment for the Rx.

Once this screen has been completed, the link will change to "View."

Rx Entry	Rx Image
View	View

Preview. If everything is correct, click SAVE & DONE

How to Upload a Paper Prescription (For Therapists - Continued)

- **Step 2 – Upload Prescription Image & Enter Image Details.**
- Click on **Upload Rx Image** Link

Prescriptions / Written Orders for Caseload

Filter By
Provider: Session: 2020 - 2021 Winter

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image
RS2021WC			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

1. **Choose File** and browse to 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**
8. Link will change to “View.”

Rx Entry	Rx Image
View	View

Manage Prescription File

Managing Order File For:

Choose File No file chosen

Provider:

School Year: 2020 - 2021

Description
**You can type a description here.
(e.g., Summer Speech Rx.)**

Ordering Provider Information (optional)

Ordering Provider NPI:

Date Signed:

	From	To	Frequency	Service Type	Signed By	Date Signed
<input checked="" type="checkbox"/>	7/1/2020	6/30/2021	PER IEP	Speech Therapy		7/1/2020

Save

The Image Details Screen can be accessed from all three menu options.

How do you know if you completed your Rx? (For Therapists)

❑ 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 also change to “**View**” when the Rx has been successfully uploaded.

How to print Rx from Prescriptions for Caseload

- 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	
RS2021WC			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 on the Rx image>**Print**

Manage Prescription Entry

Managing Order Entry For:
Image:View Image **Click View Image link.**

Order Type:

**** OR ****

Back

Forward

Reload

Save as...

Print...

- From the **Rx Image** column, click “**View.**”
- Click the “**View Order File**” link.
- Right Click on the Rx image>**Print**

Manage Prescription File

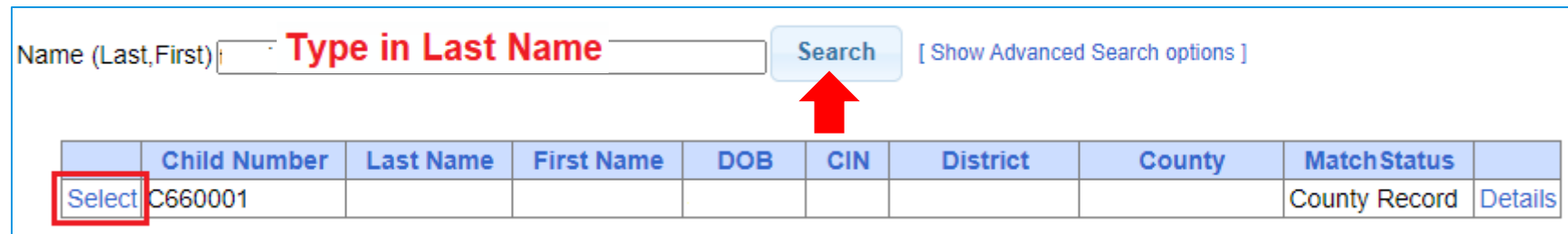
Managing Order File For:
Image:View Order File

How to Upload a Paper Prescription (For Admins)

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

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

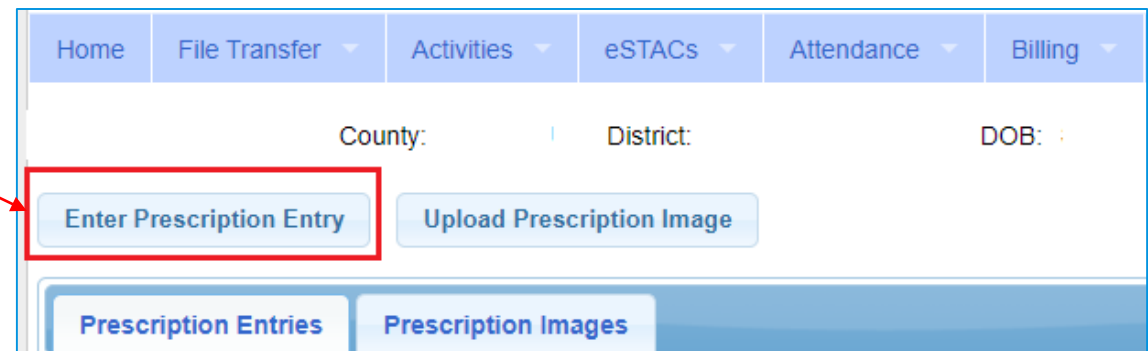
- Type in the child's **Last Name** into the Search Box>**SEARCH**
- Click **SELECT**



Name (Last,First) **Type in Last Name** [Show Advanced Search options]

	Child Number	Last Name	First Name	DOB	CIN	District	County	MatchStatus	
<input type="button" value="Select"/>	C660001							County Record	Details

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



Home | File Transfer | Activities | eSTACs | Attendance | Billing

County: | District: | DOB: |

How to Upload a Paper Prescription (For Admins - Continued)

- Fill in the items marked in **red**

Manage Prescription Entry

Managing Order Entry For:
Image: [Attach To Image](#)

Order Type: Speech Therapy ▼ Provider: ▼

Ordering Provider NPI: Date Signed:

Prescription effective date range

☒ Applies to entire school year
☐ Applies to specific school year / session
☐ Applies to specific date range

Reason for Services

ICD Search by code or description...

Reason

Frequency

☒ Per IEP ☐ Specific X WEEKLY ▼

	ESID	From	To	Frequency	Service Type	I/G
<input checked="" type="checkbox"/>	RS2021W0	9/8/2020	6/23/2021	3x30	Speech Therapy	I

Preview **Make sure you select the enrollment for the Rx.** Cancel

Manage Prescription Preview

Preview

Child:
Service: Speech Therapy
Dates Covered: 7/1/2020 - 6/30/2021
Frequency: Per IEP
Reason:

ICD Code(s)	ICDCode	Description
	F84.0	Autistic disorder

Ordered By

Name:
NPI: 1992821
Date Signed: 8/6/20

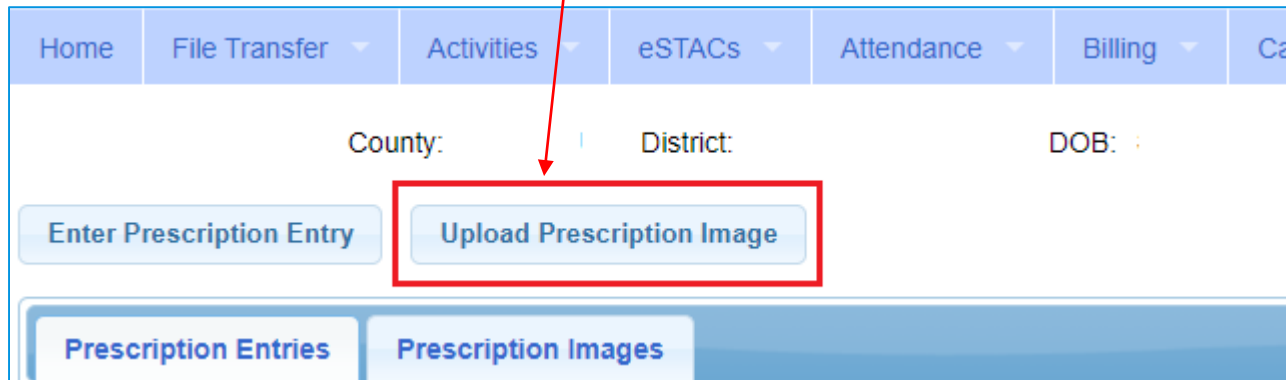
Save & Done Cancel

Link will change to **"Entered" or "Verified."**

Status			
VERIFIED	View	Edit Entry	
VERIFIED	View	Edit Entry	

How to Upload a Paper Prescription (For Admins - Continued)

- **Step 2 – Upload Prescription Image & Enter Image Details**
- Click on **UPLOAD PRESCRIPTION IMAGE**



The screenshot displays a software interface with a top navigation bar containing links: Home, File Transfer, Activities, eSTACs, Attendance, Billing, and Ca. Below the navigation bar, there are input fields for 'County:', 'District:', and 'DOB:'. A red arrow points from the text 'Click on UPLOAD PRESCRIPTION IMAGE' to a button labeled 'Upload Prescription Image', which is highlighted with a red rectangular box. To the left of this button is another button labeled 'Enter Prescription Entry'. At the bottom of the interface, there are two tabs: 'Prescription Entries' and 'Prescription Images'.

How to Upload a Paper Prescription (For Admins - Continued)

1. **Choose File** and browse to 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.
 7. Check the **eligible order**.
 8. Click **Save**
- Link will change to “**Attached to Verified Order.**”

Image Status			
ATTACHED TO VERIFIED ORDER	View	Edit Image	
ATTACHED TO VERIFIED ORDER	View	Edit Image	

Manage Prescription File

Managing Order File For:

Choose File

 No file chosen

Provider:

School Year: 2020 - 2021

Description

You can enter a description here.
(e.g., Summer Speech Rx.)

Ordering Provider Information (optional)

Ordering Provider NPI: 173021

Date Signed: 7/1/2020

	From	To	Frequency	Service Type	Signed By	Date Signed
<input checked="" type="checkbox"/>	7/1/2020	6/30/2021	PER IEP	Speech Therapy		7/1/2020

Save

Cancel

How to Upload a Paper Prescription (For Admins - Continued)

❑ 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**.

A screenshot of the "Prescription Entries" tab. It shows a table with the following data:

From	To	Order Type	Frequency	Signed By	NPI	Date Signed	ICD Codes	Status	View	Edit Entry	Delete
7/1/2019	6/30/2020	Speech Therapy	PER IEP	DEBORAH CHASSSEN	1730278607	7/1/2018	R47.89	INVALIDATED: Signed with a signature stamp.	View	Edit Entry	Delete
7/1/2018	6/30/2019	Speech Therapy	PER IEP	DEBORAH CHASSSEN	1730278607	7/1/2018	R47.89	VERIFIED	View	Edit Entry	Delete

Red arrows indicate the "Prescription Entries" tab is selected and the "Status" column is highlighted in the table.

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

A screenshot of the "Prescription Images" tab. It shows a table with the following data:

School Year	Description	Signed By	Date Signed	Date Uploaded	Image Status	View	Edit Image	Delete
201920	speech	DEBORAH CHASSSEN	7/1/2018	7/11/2019	ATTACHED TO ORDER	View	Edit Image	Delete
201819	Order File created from CPSE Portal	DEBORAH CHASSSEN	7/1/2018	12/5/2018	UNATTACHED TO ORDER	View	Edit Image	Delete

Red arrows indicate the "Prescription Images" tab is selected and the "Image Status" column is highlighted in the table.

How do you know if you completed your Rx? (For Admins)

- ❑ How do you know if you successfully completed your prescription?
- ❑ The **Status** Column on the Prescription Entry Maintenance screen will let you know whether the prescription has been Entered, Verified, Missing or Invalidated.

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

Prescription Entries Prescription Images											
Prescription Entries											
From	To	Order Type	Frequency	Signed By	NPI	Date Signed	ICD Codes	Status			
7/1/2020	6/30/2021	Speech Therapy	PER IEP		173027	7/3/2020	R47.89	VERIFIED	View	Edit Entry	
7/1/2019	6/30/2020	Speech Therapy	PER IEP		173027	9/2/2019	R47.89	ENTERED	View	Edit Entry	Delete
7/1/2019	6/30/2020	Speech Therapy	PER IEP		173027	9/3/2019	R47.89	VERIFIED	View	Edit Entry	

How to print the prescription from Prescription Entry Maintenance

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

- Type in the **name of the child**>Click **SEARCH**

Name (Last,First) **Search** [Hide Advanced Search options]

School Year County Provider District

Child Number STAC ID Electronic Service ID Medicaid CIN

	Child Number	Last Name	First Name	DOB	SED STAC ID	CIN	District	County	MatchStatus	
Select	C6600006			6/8/2014					County Record	Details
Select	C6600012			6/8/2014					County Record	Details

- Click **Select** for the correct child. After you click **Select**, the following screen comes up. You can print from either the **Prescription Entries Tab** or the **Prescription Images Tab** by clicking **View**.

Prescription Entries

Prescription Entries

From	To	Order Type	Frequency	Signed By	NPI	Date Signed	ICD Codes	Status	
7/1/2018	6/30/2019	Speech Therapy	PER IEP	CRISTINA CIAMEI	1003069931	9/5/2018	F80.0,F80.2	VERIFIED	View Edit Entry

- Click **View** from either Tab.
- When the image comes up, **Right Click** on the Rx image and **print**.

Back

Forward

Reload

Save as...

Print...

Prescription Images

Prescription Images

School Year	Description	Signed By	Date Signed	Date Uploaded	Image Status	
201819				12/12/2018	ATTACHED TO VERIFIED ORDER	View Edit Image

How to print the prescription from Child Lookup

Go to Lookup>Child Lookup

- ❑ Type in the **name** of the child>**SEARCH**
- ❑ Click **Details**

Child Lookup


Name (Last,First) [Hide Advanced Search options]

School Year County Provider District

Child Number STAC ID Electronic Service ID Medicaid CIN

Child Number	Last Name	First Name	DOB	SED STAC ID	CIN	District	County	MatchStatus	
C660C 41			7/15/2016					County Record	<input type="button" value="Details"/>

- ❑ Click the **Written Orders Tab**



How to print the prescription from Child Lookup - Continued

Go to Lookup>Child Lookup

- ❑ You will see two tables: **Prescription Images** & **Prescription Entries**
- ❑ Click the “**Manage**” link in either table to view the prescription.
- ❑ Click “**View Order File**” or “**View Image.**” The prescription will come up.
- ❑ **Right click** on the **Rx Image** and Select **Print**.

Back
Forward
Reload
Save as...
Print...

Home File Transfer Activities eSTACs Attendance Billing Caseload Maintenance **Lookup**

Child Details ()
Child Number: C28000023834
DOB: 12/7/2011 Gender: M
Address: 31 WAVERLY AVE
EAST ROCKAWAY, NY 11518
County: NASSAU
District: LYNBROOK UFSD
Matched?: Y

Enrollments **Written Orders** Documents

Upload Prescription Entry Upload Prescription Image

Prescription Images

Description	SchoolYear	Signed By	Date Signed	Date Uploaded	Invalid Reason	Invalidated
16-17 ST	201617			7/18/2017		manage

Prescription Entries

From	To	Service	Frequency	Signed By	Date Signed	
7/1/2016	6/30/2017	Speech Therapy	PER IEP	JOAN ROONEY	7/1/2016	manage

Manage Prescription File
Managing Order File For:
Image:View Order File

Manage Prescription Entry
Managing Order Entry For:
Image:View Image
Order Type: Speech Therapy

TROUBLESHOOTING (Prescription Uploading)

- ❑ If the **Prescription Entry** and/or the **Image Entry** is not completed in its entirety, your prescription will show as “missing.” As a result, when you try to submit your voucher, you will receive the following error: **“Details of Prescription/Order not entered for enrollment.”**
- ❑ Listed below are some things to check to ensure everything is entered correctly for each screen:
- ❑ The **Prescription Entry Details** were not completed; or they were completed, but **Preview/Save & Done** was not clicked to save the entry.

The screenshot shows two parts of a web application. The left part is a table with columns: ESID, From, To, Frequency, Service Type, and I/G. The first row has values: RS2021W0, 9/8/2020, 6/23/2021, 3x30, Speech Therapy, and I. A red box highlights the checkbox next to the ESID. Below the table is a 'Preview' button, also highlighted with a red box. To the right of the table is a red text instruction: 'Make sure you select the enrollment for the Rx.' Below this is a 'Cancel' button. The right part of the screenshot is a form titled 'Ordered By'. It contains fields for Name, NPI (1992821), and Date Signed (8/6/20). Below these fields are 'Save & Done' and 'Cancel' buttons. A red box highlights the 'Save & Done' button. Red arrows point from the text in the third list item to these two buttons.

ESID	From	To	Frequency	Service Type	I/G
<input checked="" type="checkbox"/> RS2021W0	9/8/2020	6/23/2021	3x30	Speech Therapy	I

Make sure you select the enrollment for the Rx.

Preview Preview. If everything is correct, click **SAVE & DONE** **Cancel**

Ordered By

Name: NPI: 1992821 Date Signed: 8/6/20

Save & Done **Cancel**

- ❑ The **enrollment(s)** that the prescription covers was not selected on the Prescription Entry Screen.

TROUBLESHOOTING

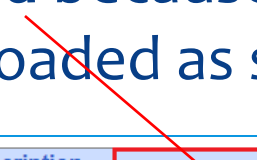
(Prescription Uploading - Continued)

- ❑ The **Eligible Orders** on the Image Entry Screen was not checked for the Rx image.



	From	To	Frequency	Service Type	Signed By	Date Signed
<input checked="" type="checkbox"/>	7/1/2020	6/30/2021	PER IEP	Speech Therapy		7/1/2020

- ❑ The prescription was **invalidated** because it did not meet Medicaid requirements. A new prescription should be uploaded as soon as possible or billing will be halted.



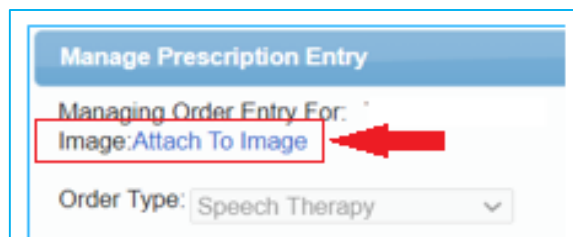
ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	ENTERED	View	View	
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	INVALIDATED: Computer-generated signature stamp used.	Enter Rx Info	Upload Rx Image	Create Speech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

- ❑ An Invalidated Rx changes the Rx status from “Entered” to “Missing.” Billing cannot proceed until another prescription has been uploaded.

TROUBLESHOOTING

(Prescription Uploading - Continued)

- ❑ The **Rx Image** was either not uploaded or it was uploaded and not attached to the Prescription Entry Details. If the image was uploaded, but not attached, you can click the “**Attach To Image**” link on the Prescription Entry screen (top of screen) and select from the available uploaded images.



Otherwise, the Rx image needs to be uploaded and then attached from the Prescription Entry Details Screen.

- ❑ You are sure that you uploaded the prescription, but the ESID # is still appearing on the Missing Scripts Report. Why?
When the prescription was entered, you may not have selected the correct school year. As a result, the prescription was uploaded to the incorrect school year. The Portal will default to the current school year. If you are trying to upload a prescription for the previous or upcoming school year, make sure you change the school year when completing the prescription entry and image screens.

TROUBLESHOOTING

(Prescription Uploading – Troubleshooting Summary)

- ❑ In summary the following issues will cause your prescription to show as missing:
 - ✓ 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.”

When can an SLP prepare their prescription?

The Medicaid Provider & Billing Handbook (Update 9) states that prescriptions must be prospective (**prior to the initiation of service/evaluation**). However, the Medicaid Q&A states that an SLP who has not seen the student cannot write a referral.

Medicaid Questions & Answers

Question #94.

Can a NYS licensed and currently registered speech-language pathologist (SLP) who has not seen the student write a referral for speech therapy?

Answer: No.

The SLP cannot write a referral if they have not seen the student. 18NYCRR 505.11 states that a written order must contain a diagnostic statement and purpose of treatment. It is not acceptable under the Medicaid program for the ordering or referring professional never to have met with the child as it is incompatible with the obligations of the ordering practitioner to assure that the ordered care, services, or supplies will meet the recipient's needs and restore him or her to the best possible functional level. [December 13, 2010]

When can an SLP prepare their prescription?

(Continued)

McGuinness has recently received direction from SED regarding this specific issue.

SLPs can write a Speech recommendation “**directly following**” the initial session with the child under the following circumstances:*

- ❑ *The SLP uses the results of the initial evaluation (which should be delineated in the IEP)*
- ❑ *The SLP can be assured that the ordered services will meet the child’s needs*
- ❑ *The SLP can be assured that the child’s level of function can be increased to the best possible outcome*
- ❑ *If the above criteria can be met, the recommendation can be written on the same day “**after**” the initial session and the session will be Medicaid-eligible. If the prescription is not written on the same day that services began, any provided sessions that took place prior to the date of the prescription must be marked as “**Not Medicaid-Eligible**” on the session note.*
- ❑ *The date of the Speech recommendation must be the **same date as the initial session** with the child.*

(* This has been confirmed with SED.)

Digital Speech Recommendation

- ❑ There is a process in the Portal where an SLP can upload a Digital Speech Recommendation that is digitally signed with the SLP's Portal Pin #.
- ❑ There are many benefits in choosing the digital option rather than uploading a paper document.
- ❑ Since this process is only for SLPs, we will be scheduling a separate webinar to present this information to the target audience.
- ❑ This webinar will be scheduled for some time in November so therapists can begin using this feature during the upcoming annual review season (2021-22).

Reports

(Outstanding Documentation Reports)

☐ Listed below are some reports that may assist you with your Medicaid responsibilities:

- **Outstanding Documentation Reports**

The Portal has several reports that can be run periodically (by the county or provider) to determine if a provider has outstanding documentation.

- * Medicaid>Missing Documents> **Missing Scripts**
- * Medicaid>IEP Documents>**Missing IEPs**
- * Medicaid>Missing Documents> **Missing Documents Preventing Claiming** – This report shows outstanding documentation for Parental Consents, Prescriptions and IEPs.

Is there a way to determine if I have completed a prescription for all children on my caseload?

❑ There are three ways to run a report to check the status of what has been entered and/or missing.

1. **Medicaid>Missing Documents>Missing Scripts**

This report will show what is missing or verified for all children.

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

This report will show the status for each child on your caseload. (*Missing, Verified, Entered, Invalidated/Reason*)

3. **Medicaid>Prescriptions>Prescription Entry Maintenance**

Click the **SEARCH** button and a list of all children will populate. You can check an individual child's status by clicking the "Select" link at the beginning of the row. The "**STATUS**" column will reveal the status of the script.

Missing Prescriptions Report

Medicaid>Missing Documents>Missing Scripts

Missing Scripts

Filters

Provider Session County

Filter Options

Show Missing Scripts ☒ Show Not Verified Scripts ☐ Show Verified Scripts ☐

Status	LastName	FirstName	DOB	ESID	From Date	To Date	Service	I/G	Frequency	County	District
MISSING			11/10/15		03/04/19	06/26/19	OT	I	2x30	NASSAU	GREAT NECK UFSD
MISSING			04/27/14		09/05/18	06/26/19	ST	I	3x30	NASSAU	ROCKVILLE CENTRE UFSD
MISSING			12/27/13		01/28/19	06/26/19	ST	I	1x30	NASSAU	HICKSVILLE UFSD
MISSING			12/27/13		01/28/19	06/26/19	ST	G	1x30	NASSAU	HICKSVILLE UFSD
MISSING			01/09/15		12/03/18	06/26/19	OT	I	2x30	NASSAU	HERRICKS UFSD
MISSING			05/28/15		09/05/18	06/26/19	OT	I	1x30	NASSAU	HICKSVILLE UFSD
MISSING			12/01/14		11/05/18	06/26/19	OT	I	2x30	NASSAU	GARDEN CITY UFSD
MISSING			12/01/14		03/18/19	06/26/19	ST	I	1x30	NASSAU	GARDEN CITY UFSD
MISSING			12/01/14		03/18/19	06/26/19	ST	I	2x30	NASSAU	GARDEN CITY UFSD
MISSING			12/01/14		03/18/19	06/26/19	CSL	I	1x30	NASSAU	GARDEN CITY UFSD
MISSING			11/06/14		02/11/19	06/26/19	OT	I	2x30	NASSAU	FRANKLIN SQUARE UFSD
MISSING			03/01/15		03/14/19	06/26/19	ST	I	3x30	NASSAU	WEST HEMPSTEAD UFSD
MISSING			06/16/15		02/11/19	06/26/19	ST	I	1x30	NASSAU	GARDEN CITY UFSD
MISSING			06/16/15		03/11/19	06/26/19	ST	I	3x30	NASSAU	GARDEN CITY UFSD
MISSING			06/16/15		03/11/19	06/26/19	ST	I	1x30	NASSAU	GARDEN CITY UFSD
MISSING			06/25/15		01/23/19	06/26/19	ST	I	3x30	NASSAU	UNIONDALE UFSD
MISSING			06/20/15		03/18/19	06/26/19	OT	I	3x30	NASSAU	ELMONT UFSD
MISSING			11/12/14		03/29/19	06/26/19	OT	I	1x30	NASSAU	MANHASSET UFSD
MISSING			11/12/14		03/29/19	06/26/19	OT	I	1x30	NASSAU	MANHASSET UFSD
MISSING			01/20/15		01/14/19	06/26/19	PT	I	2x30	NASSAU	ELMONT UFSD

Prescription Status Report for Caseload

Caseload Maintenance>Prescriptions for Caseload

Prescriptions / Written Orders for Caseload

Filter By

Provider:

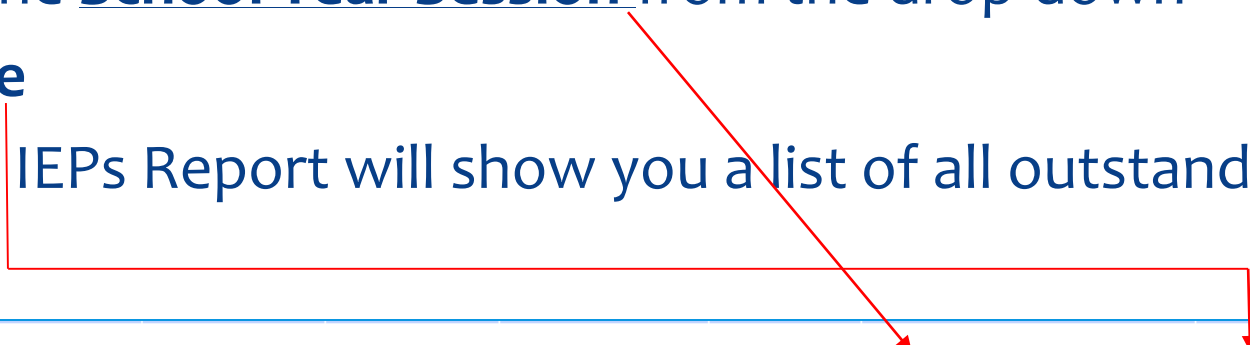
Session: 2018 - 2019 Winter

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
			1/2/2019	6/26/2019	ST 2x30 Individual	VERIFIED	View	View	
			1/14/2019	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/5/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/5/2018	11/12/2018	ST 4x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			11/13/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			11/13/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/5/2018	6/26/2019	ST 3x30 Individual	VERIFIED	View	View	
			10/22/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/5/2018	6/26/2019	ST 4x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/5/2018	6/26/2019	ST 4x30 Individual	VERIFIED	View	View	
			9/5/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			4/15/2019	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/5/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			2/11/2019	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/5/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			3/21/2019	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

Missing IEPs Report

Medicaid>IEP Documents>Missing IEPs

- ❑ Go to **Medicaid>IEP Documents>Missing IEPs**
- ❑ Select the **School Year Session** from the drop-down
- ❑ **Retrieve**
- ❑ Missing IEPs Report will show you a list of all outstanding IEPs.



County: Provider: School Year Session:

Missing IEPs

Last Name	First Name	DOB	ESID	From Date	To Date	Service Type	I/G	Frequency	County	District
		05/22/16		07/06/20	08/14/20	ST	I	2x30		
		04/06/15		07/06/20	08/14/20	ST	I	3x30		
		05/27/15		07/06/20	08/14/20	ST	I	1x30		

Missing Documents Preventing Claiming Report

Medicaid>Missing Documents>Missing Documents Preventing Claiming

- ❑ Go to **Medicaid>Missing Documents>Missing Documents Preventing Claiming**
- ❑ Enter the “**Oldest Date.**” (The first date that you would like to determine missing documentation. (e.g., To run a report for the summer session, the oldest date would be 7/1/20.)
- ❑ Click **SEARCH.**

Missing Documents Preventing Claiming

County Provider District Oldest Date:

Provider	District	Child	DOB	Session	ESID	Service	From Date	To Date	Need IEP	Need Consent	Need Script
			03/31/15	202021 SUM	RS2021SI	ST	07/06/20	08/14/20	YES		

If documentation is missing, "YES" will appear in the column for IEP, Consent or Script.

- ❑ This report can be exported to Excel where filtering can be applied.

Questions?

Any more questions?

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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>