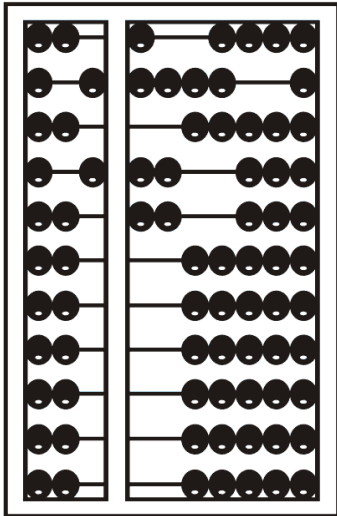


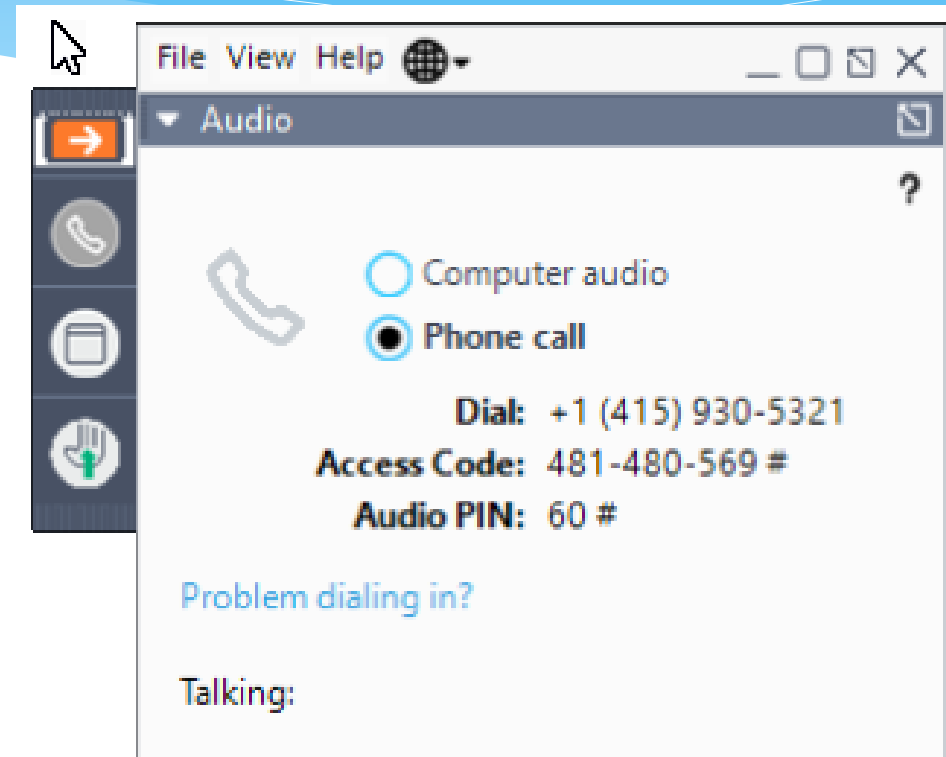
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# Using Go To Webinar

# Go To Webinar Control Panel

- \* Control panel is on far right of screen
- \* Orange button with white arrow expands and shrinks control panel

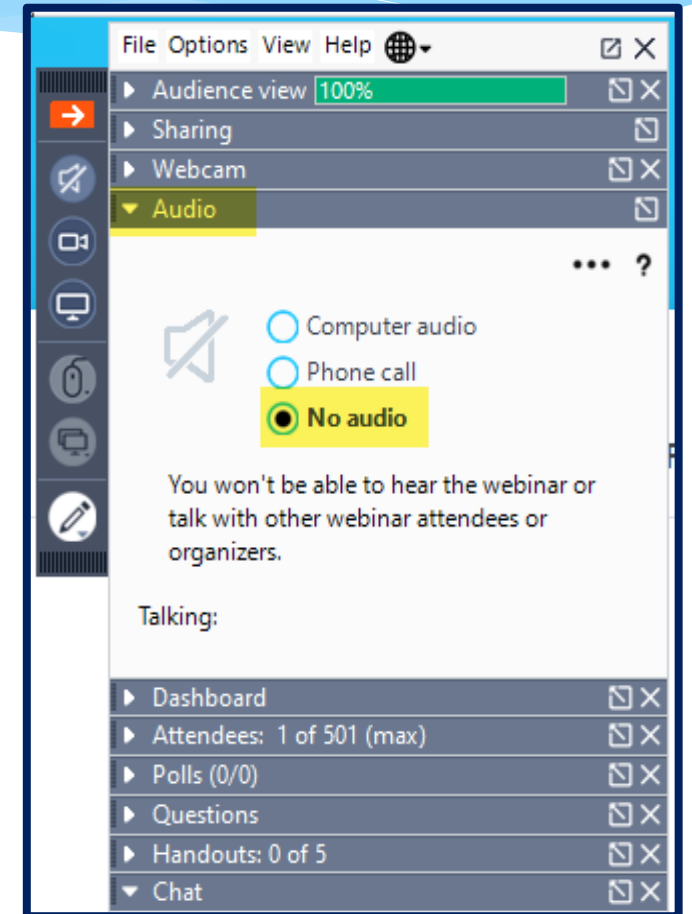
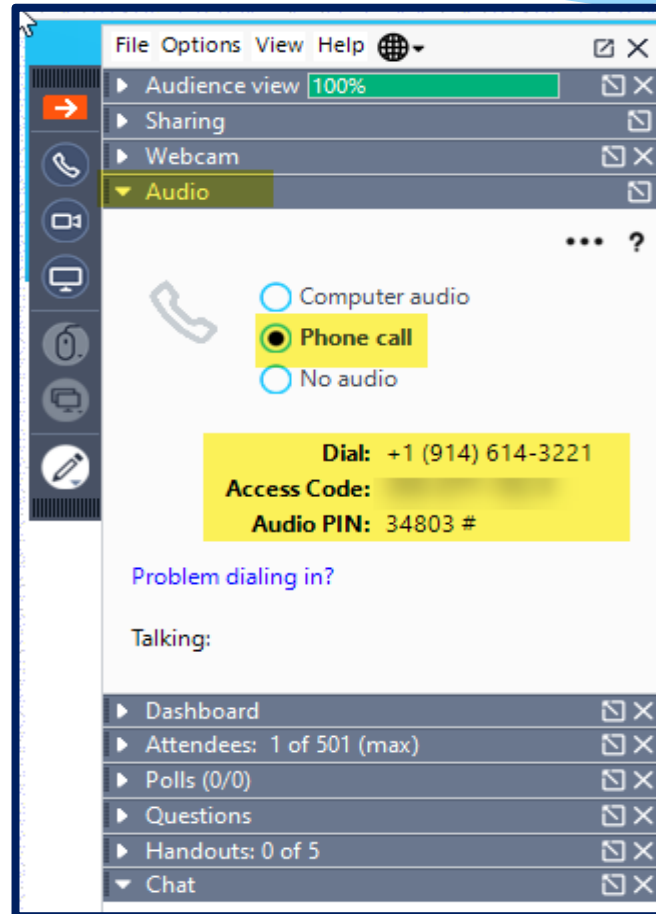
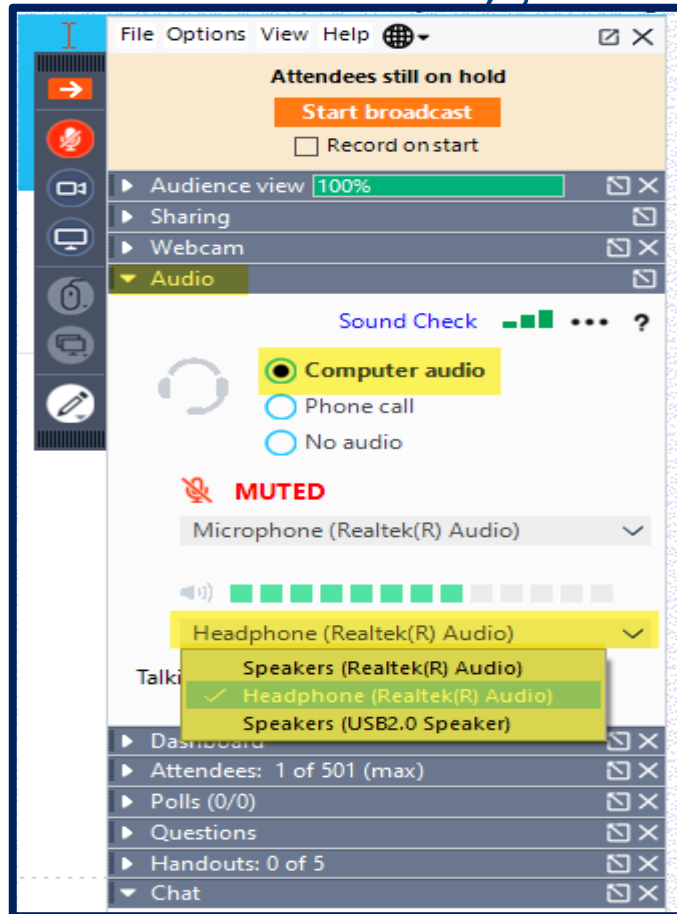


# Communicating with Presenter

- \* All participants are on mute.
- \* You can raise your hand in response to a question we ask. Do not raise your hand to ask a question.
- \* You can type in question in the question box.

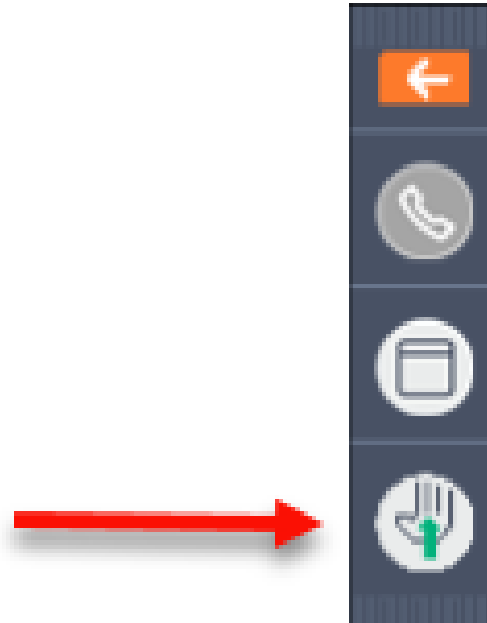
# Can't Hear the Webinar?

\* Under the Audio tab, you can choose Computer Audio, Phone Call or No Audio. If you choose No Audio, you will not be able to hear the webinar!



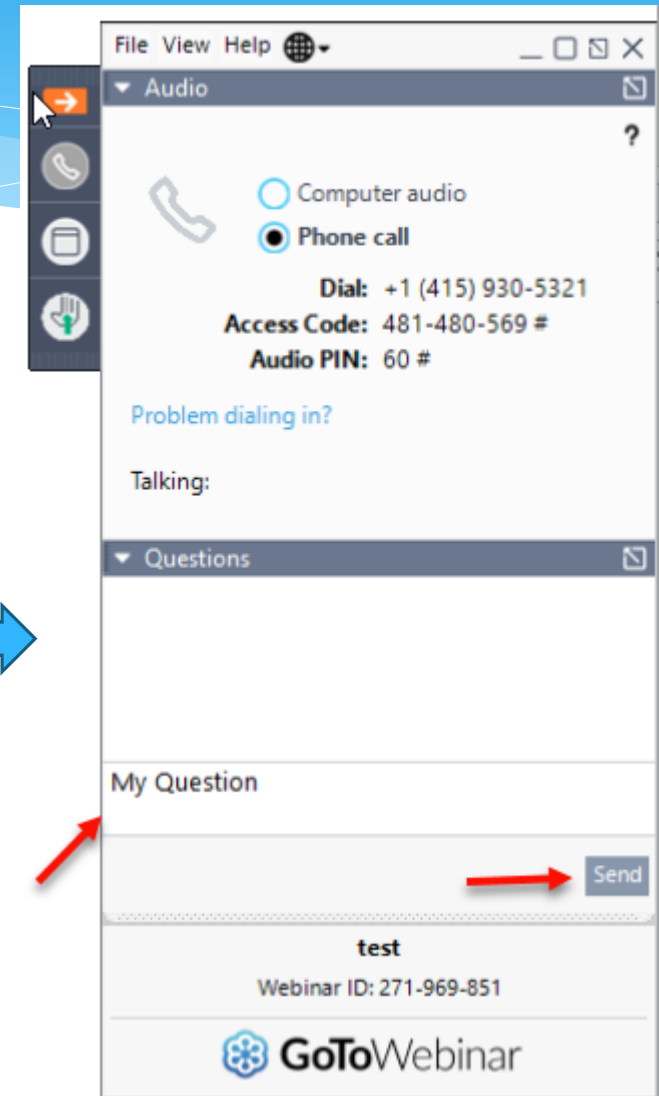
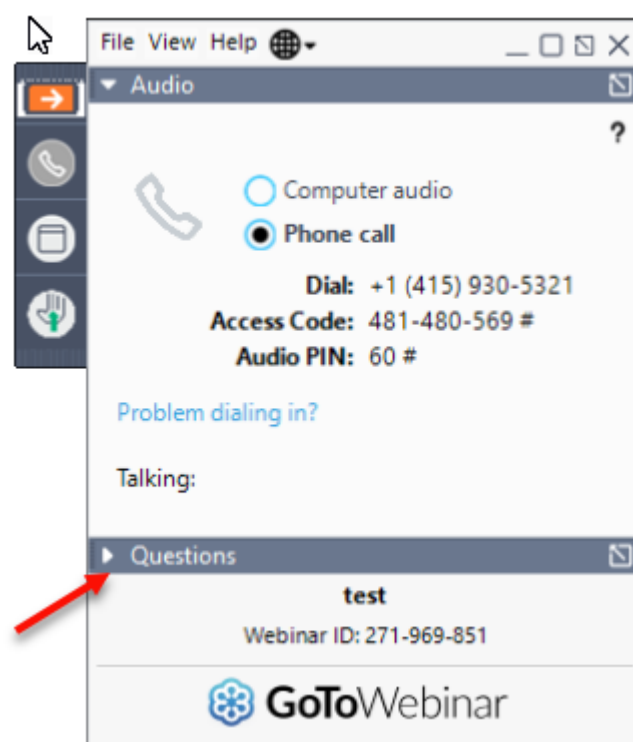
# Raising your hand

- \* On bottom left of control panel is a button with a hand icon
- \* Click that button to raise your hand



# Typing in a Question

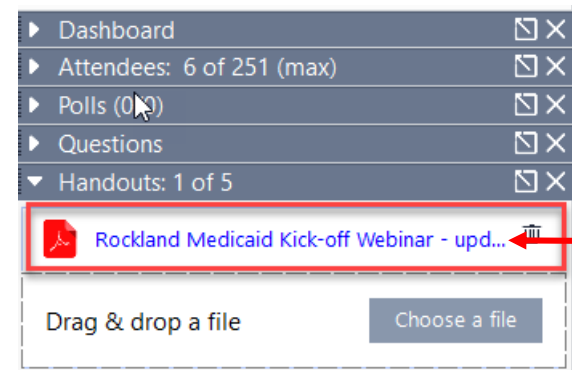
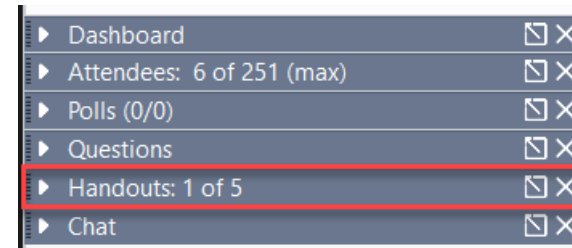
- \* Click the question bar to expand questions section
- \* Type in your question and click send



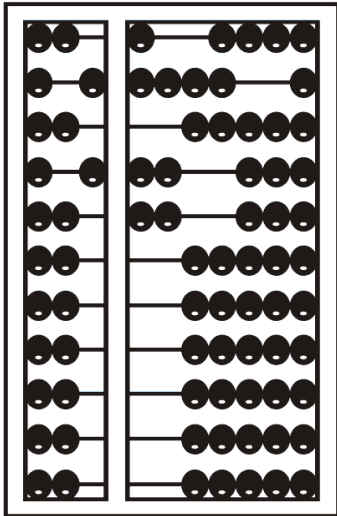
# Handouts

**If you would like to download the handout:**

- \* Click the “Handouts” icon on the control panel.
- \* Click the link for the handout that you would like to download.



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# CPSE Portal Billing for Independent Providers



# Topics Covered

- \* Review of Credential Verification
- \* Creating a Voucher
  - \* What is an ESID
  - \* Voucher Terminology
- \* Missing Attendance
  - \* Why Doesn't Attendance Appear on my Voucher
  - \* Items Not Ready to Bill
  - \* Move Attendance Between Enrollments
- \* Submitting Vouchers
- \* Cannot Submit Voucher
  - \* Problems on Voucher
  - \* Problem of "Not Co-Signed"
- \* Print Voucher Summary
- \* Attendance Denied by County?
  - \* How to Correct and Re-Bill
- \* Reports
  - \* Voucher Listing Report
- \* Submitted Billing Questions



# Review of Credential Verification

# What is Credential Verification?

- \* A simple process to verify that the information about a Licensed Professional (OT, PT, SLP, OTA, PTA, LMSW, LCSW, etc.) is correctly entered in CPSE Portal.
- \* The individual's information that needs to be verified:
  - \* First Name, Last Name & Signature
  - \* Profession (OT, PT, SLP, ....),
  - \* License #,
  - \* Date of Licensure,
  - \* Date Registered Through
  - \* NPI #

# Credential Verification

- \* All providers licensed through the New York State Office of the Professions (Occupational Therapists, Physical Therapists, Licensed Clinical Social Workers, etc.) will need to have their credentials verified.
- \* Verification means that you will need to review what is on file with the Office of Professions and the NPI Registry to ensure that the information in the Portal is correct and attest that the information is correct.

# Credential Verification by Service Provider

- \* A service provider will log into the Portal, and see “REQUIRES VERIFICATION”.
- \* They will then need to Verify their credentials.

CPSE PORTAL

Hello, Betty . You are currently logged in

Home Activities Attendance Caseload Maintenance Lookup Reports My Account Knowledge Base

User Profile [Hide](#)

Username: **Betty**  
First Name: **Betty**  
Last Name: **Greene**  
Email: **lmell@jmcguinness.com**

[Edit User Account](#)

My Professional Profile [Hide](#)

Name: **Betty Greene**  
NPI: **1003017674 (BETTY GREENE)**

**My License(s)**

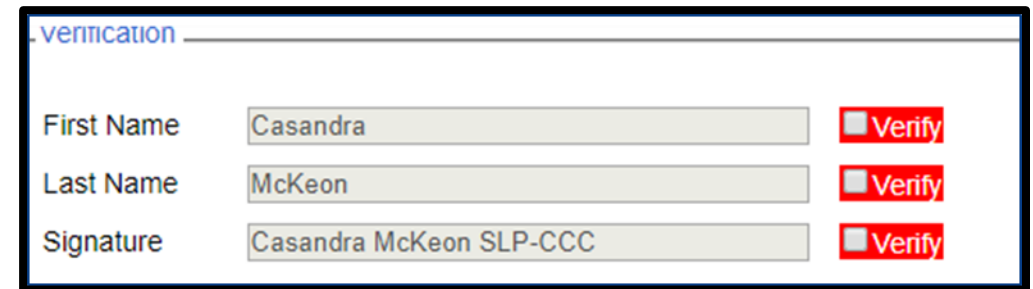
Profession	License	Original Date Of Licensure	Registered Through Date	License Lookup	Verification Status	Verify
Licensed Speech & Language Pathologist	011587	12/23/1999	01/31/2020	<a href="#">Lookup</a>	REQUIRES VERIFICATION	<a href="#">Verify</a>

**My signature**  
*Betty Greene CCC-SLP*  
Betty Greene CCC-SLP

[Edit My Profile](#)

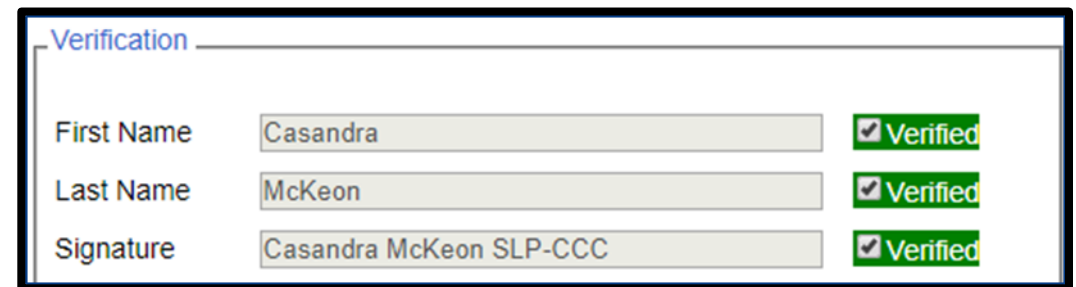
# Verifying Name

- \* Review First Name, if correct click “Verify”
- \* Review Last Name, if correct click “Verify”
- \* Review Signature, if correct click “Verify”
  
- \* After you click the red “verify” button, the status changes to green and says, “verified.”



Verification

First Name	<input type="text" value="Casandra"/>	<input type="button" value="Verify"/>
Last Name	<input type="text" value="McKeon"/>	<input type="button" value="Verify"/>
Signature	<input type="text" value="Casandra McKeon SLP-CCC"/>	<input type="button" value="Verify"/>



Verification

First Name	<input type="text" value="Casandra"/>	<input checked="" type="checkbox"/> Verified
Last Name	<input type="text" value="McKeon"/>	<input checked="" type="checkbox"/> Verified
Signature	<input type="text" value="Casandra McKeon SLP-CCC"/>	<input checked="" type="checkbox"/> Verified

# Verifying License

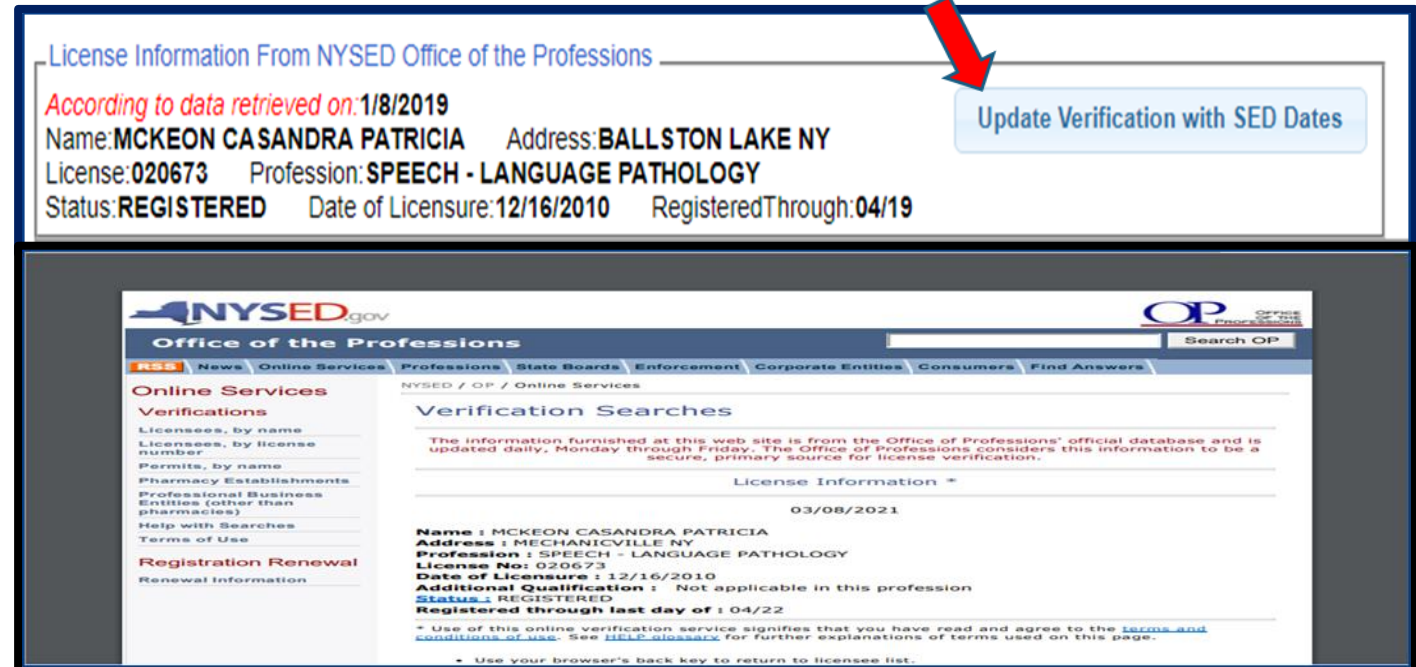
- \* Compare the CPSE Portal information on left to NYS Office of the Professions on the right to verify that this is you.
- \* You can edit/update the License #, date of licensure and registered through date.
- \* You can also use the “Update Verification with SED Dates” to fill in those fields.

Verification		
First Name	<input type="text" value="Casandra"/>	<input checked="" type="checkbox"/> Verified
Last Name	<input type="text" value="McKeon"/>	<input checked="" type="checkbox"/> Verified
Signature	<input type="text" value="Casandra McKeon SLP-CCC"/>	<input checked="" type="checkbox"/> Verified
Profession	<input type="text" value="Licensed Speech &amp; Language Pathologist"/>	<input type="checkbox"/> Verify
License No	<input type="text" value="020673"/> <input type="button" value="Update"/>	<input type="checkbox"/> Verify
Date Of Licensure	<input type="text" value="12/16/2010"/> <input type="button" value="Update"/>	<input type="checkbox"/> Verify
Registered Through	<input type="text" value="4/30/2019"/> <input type="button" value="Update"/>	<input type="checkbox"/> Verify

License Information From NYSED Office of the Professions

*According to data retrieved on: 1/8/2019*

Name: **MCKEON CASANDRA PATRICIA** Address: **BALLSTON LAKE NY**  
License: **020673** Profession: **SPEECH - LANGUAGE PATHOLOGY**  
Status: **REGISTERED** Date of Licensure: **12/16/2010** Registered Through: **04/19**





# Creating Vouchers



# 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.

# 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:**

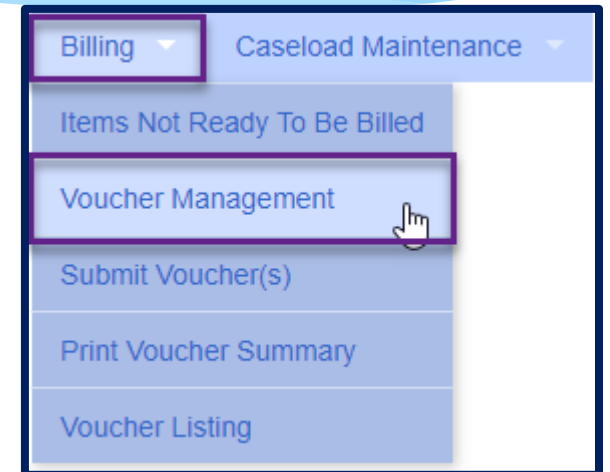
- \* This screen is used to add new monthly billing items (and their corresponding attendances) to a voucher, you use this screen. On the left are monthly items that are ready for billing, but not on any voucher yet. On the right are monthly items currently on this voucher. Note: Attendances won't be shown in the "Unassigned" grid until they are signed or co-signed, if applicable. Check which items you would like to move, then 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*”

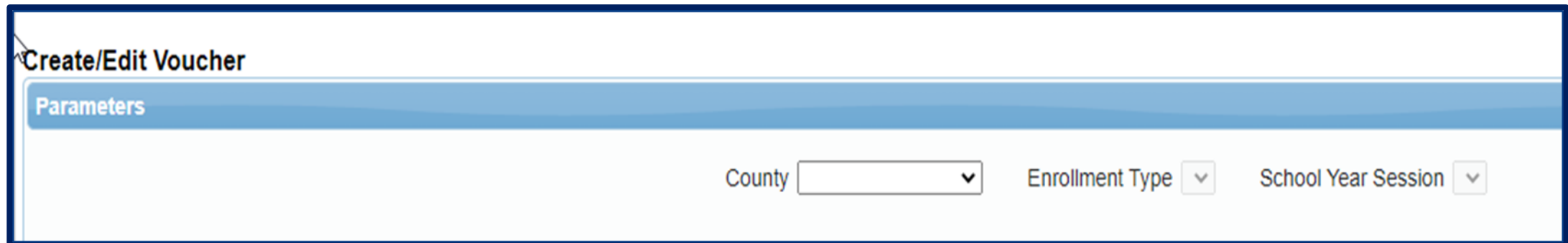


Pending Vouchers										
Voucher #	Vendor Invoice #	County Doc #	Bill Date	Service	County	Time Period	Description	Enroll. Count	Total Billed	
RS210310122341			3/10/2021	RS	Albany	2019 - 2020 Winter		0	\$0.00	Info

Recalc All   Create Voucher 

# 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 "Parameters" section, there are three dropdown menus: "County", "Enrollment Type", and "School Year Session". Each dropdown menu has a small downward-pointing arrow on its right side.

# Creating a Voucher

- \* Once you select the previous filters, then the additional options will open up.

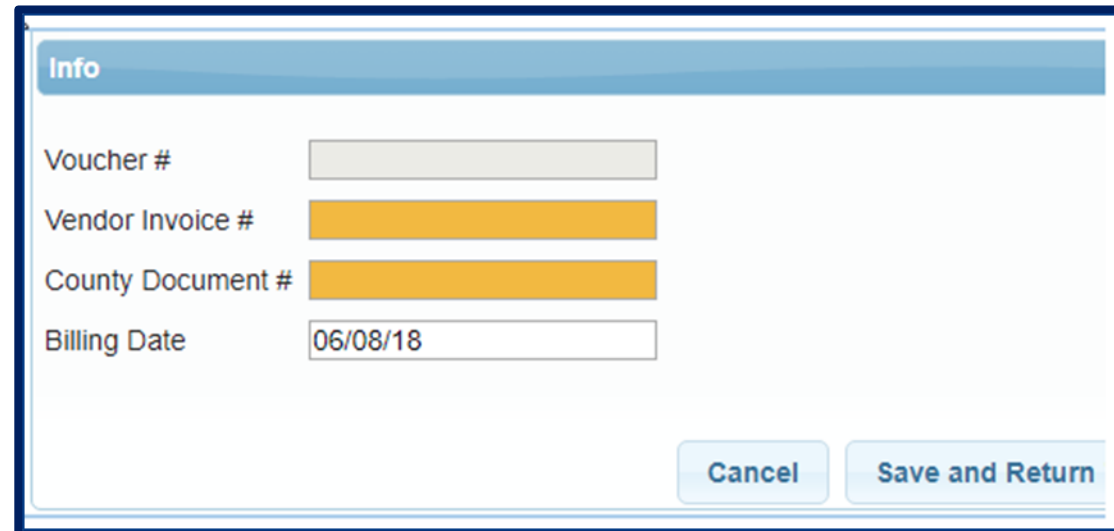
## Create/Edit Voucher

### Parameters

County	<input type="text" value="SCHENECTADY"/>	Enrollment Type	<input type="text" value="RS"/>	School Year Session	<input type="text" value="2019 - 2020 Winter"/>	Related Service Code	<input type="text"/>	SED Program Code	<input type="text"/>
		Service Month From	<input type="text"/>	Service Month To	<input type="text"/>				

# Creating a Voucher

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



Info

Voucher #

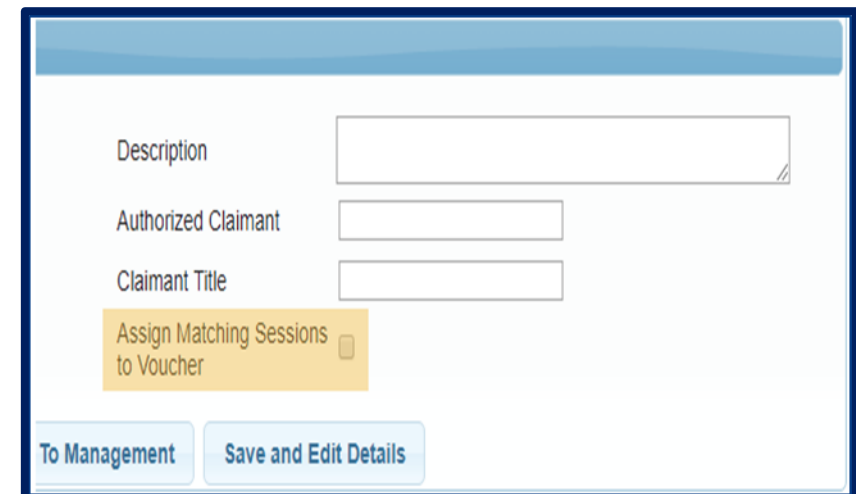
Vendor Invoice #

County Document #

Billing Date

# 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 ST)
- \* Authorized Claimant – this is your name.
- \* Claimant Title – title of claimant
- \* 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, currently unchecked, highlighted with a yellow background.
- 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  Related Service Code  SED Program Code

Service Month From  Service Month To

**Info**

Voucher #	<input type="text"/>	Description	<input type="text" value="May 2021 Speech"/>
Vendor Invoice #	<input type="text" value="ABC123"/>	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="06/10/21"/>	Assign Matching Sessions to Voucher	<input checked="" type="checkbox"/>



# 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"

The screenshot displays a software interface for creating a voucher. At the top, there are two dropdown menus for the month, both set to "September 2015". To the right, there are two checkboxes, both checked, with labels "Program" and "9200", and a "(Service)" dropdown menu. A "Filter" button is located to the right of these options. The main area contains a table with the following columns: Last Name, First Name, Month, Sessions, Amount, Svc, and ESID. The table lists several enrollment records, with the first three rows highlighted in blue. A red arrow points to the "Assign -->" button at the bottom right of the interface.

<input type="checkbox"/>	Last Name	First Name	Month	Sessions	Amount	Svc	ESID
<input checked="" type="checkbox"/>	ALMAN	Adley	September 2015	5	\$275.00 (R)	OT	RS1516W0018372
<input checked="" type="checkbox"/>	ALMAN	Adley	September 2015	5	\$275.00 (R)	PT	RS1516W0018484
<input checked="" type="checkbox"/>	ANTAKI	ZANI	September 2015	6	\$330.00 (R)	PT	RS1516W0017894
<input type="checkbox"/>	BISCARDI	Goriola	September 2015	6	\$330.00 (R)	PT	RS1516W0018260
<input type="checkbox"/>	BLOOMER	Ara	September 2015	6	\$330.00 (R)	ST	RS1516W0018191
<input type="checkbox"/>	BLOOMER	Ara	September 2015	2	\$165.00 (R)	ST	RS1516W0018562
<input type="checkbox"/>	BLOOMER	Ara	September 2015	6	\$132.00 (R)	ST	RS1516W0018563
<input type="checkbox"/>	BRATSHPIS	Sheri	September 2015	7	\$385.00 (R)	OT	RS1516W0018083
<input type="checkbox"/>	COLAVITO	Don-Anthony	September 2015	2	\$110.00 (R)	OT	RS1516W0018554
<input type="checkbox"/>	CRUZMEJIA	Janne	September 2015	6	\$330.00 (R)	PT	RS1516W0018188

# 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	ESID
<input type="checkbox"/>	ALMAN	Adley	September 2015	5	\$275.00 (R)	RS1516W0018372
<input type="checkbox"/>	ALMAN	Adley	September 2015	5	\$275.00 (R)	RS1516W0018484
<input type="checkbox"/>	ANTAKI	ZANI	September 2015	6	\$330.00 (R)	RS1516W0017894
<input type="checkbox"/>	DINH	Keysy	September 2015	5	\$275.00 (R)	RS1516W0018486
<input type="checkbox"/>	DINH	Keysy	September 2015	3	\$165.00 (R)	RS1516W0018507
<input type="checkbox"/>	EMANUEL	Zissel Devora	September 2015	3	\$165.00 (R)	RS1516W0018092
<input checked="" type="checkbox"/>	FUGATE	Keylen	September 2015	3	\$165.00 (R)	RS1516W0018105
<input type="checkbox"/>	GANGI	Quatase	September 2015	4	\$220.00 (R)	RS1516W0018581
<input type="checkbox"/>	GODOY	Nyla-Rae	September 2015	5	\$275.00 (R)	RS1516W0018142

[<-- Unassign](#)

# Creating a Voucher

**Voucher Details**

**Info**

Voucher#:  Description:

Vendor Invoice#  Authorized Claimant:

County Doc #:  Claimant Title:

Billing Date:

Contract Number:

A=Adjustment R=Regular

April 2022  Service Code:  **Unassigned** **Assigned**

April 2022  Program Code:

<input type="checkbox"/>	Last Name	First Name	Month	Sessions	Amount	Svc	ESID
<input type="checkbox"/>			April 2022	1	\$0.00 (R)	OT1	CBRS2122W0020104
<input type="checkbox"/>			April 2022	1	\$0.00 (R)	ST1	CBRS2122W0020102
<input type="checkbox"/>			April 2022	3	\$0.00 (R)	OT	CBRS2122W0020103

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

<input type="checkbox"/>	Last Name	First Name	Service Month	Sessions	Amount Billed	Svc	ESID
<input type="checkbox"/>			April 2022	7.5	\$0.00 (R)	OT	CBRS2122W0020602
<input type="checkbox"/>			April 2022	2	\$0.00 (R)	PT	CBRS2122W0021255
<input type="checkbox"/>			April 2022	3	\$0.00 (R)	PSY	CBRS2122W0020754
<input type="checkbox"/>			April 2022	6	\$0.00 (R)	ST	CBRS2122W0020555
<input type="checkbox"/>			April 2022	2	\$0.00 (R)	OT	CBRS2122W0020091
<input type="checkbox"/>			April 2022	2	\$0.00 (R)	ST	CBRS2122W0020089
<input type="checkbox"/>			April 2022	3.5	\$0.00 (R)	PT	CBRS2122W0020437
<input type="checkbox"/>			April 2022	3	\$0.00 (R)	ST	CBRS2122W0020096
<input type="checkbox"/>			April 2022	1	\$0.00 (R)	OT	CBRS2122W0020098
<input type="checkbox"/>			April 2022	10	\$0.00 (R)	ST	CBRS2122W0020069

Amount Billed: **\$0.00**

# 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”





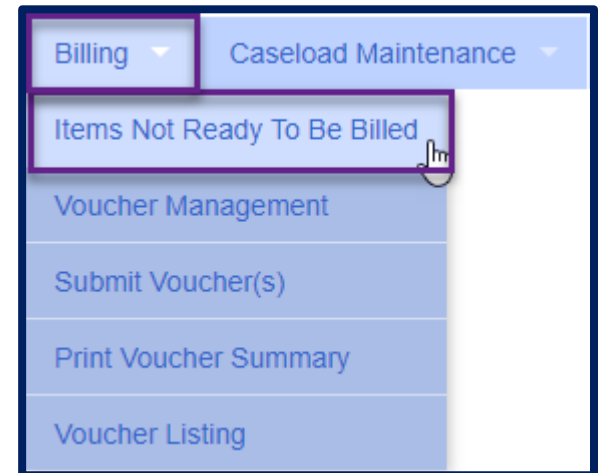
# Missing Attendance

# 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) 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:**
    - \* You will need to sign the attendance.
  - \* **The attendance is on another Voucher:**
    - \* If the other voucher has not been submitted you can remove it from that voucher.
    - \* If the County denied that attendance on that other voucher, submit request to [support@CPSEPortal.com](mailto:support@CPSEPortal.com) to rebill for that ESID and date of service.
  - \* **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.

# 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
  - \* Enrollment was rescinded
  - \* Attendances 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:	<input type="text"/>	County:	<input type="text"/>	*	
School Year Session:	<input type="text" value="2019 - 2020 Winter"/>	Service Month From:	<input type="text"/>	Service Month To:	<input type="text"/>
Enrollment Type:	<input type="text"/>	Service Type:	<input type="text"/>	Program Code:	<input type="text"/>

# 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:	GEBAUER,BETTY		County:	SCHENECTADY											
School Year Session:	2019 - 2020 Winter		Service Month From:			Service Month To:									
Enrollment Type:	RS		Service Type:			Program Code:			Retrieve						
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**

# 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
<input type="checkbox"/> 1/5/2022		I
<input type="checkbox"/> 1/6/2022		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

County	District	ESID	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
Select	ULSTER	KINGSTON CITY SD	CBRS2122W0035918	CBRS	9/8/2021	12/17/2021	PT	3x30	I
Select	ULSTER	KINGSTON CITY SD	CBRS2122W0036248	CBRS	12/18/2021	6/23/2022	PT	3x30	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  county (unbilled CB vouchers).

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	

Select All **Total Billed:** \$52,452.00

# 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 confirmation message and a form. The message reads: "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." Below the message are four input fields: "Provider Name:", "Username:", "Name & Title:", and "Pin". A button labeled "I agree." is positioned below the "Pin" field.

**NOTE:** Once you submit a voucher to the county, it is **NO** longer possible to edit its 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 along with Parent Signature Logs .



**Provider:** GEBAUER,BETTY

**Vendor#:** 02061

**Tax ID:**

**BEDS Code:**

**Voucher Description:** July 2019

**Voucher Summary**

**Bill Date:** 8/4/2019

**Submitted :** 8/19/19 04:09 PM

**Time Period:** 2019 - 2020 Summer

*Printed: 6/17/2021 2:13:30 PM*

Page 1 of 1

**County:** SCHENECTADY

**CPSE Voucher#:** RS190804113625

**Vendor Invoice#:**

**County Doc#:**

**Contract Or Account#:**

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
<b>Grand Total:</b>								<b>\$927.00</b>

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  county (unbilled RS vouchers).

Select any Unbilled Vouchers

Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed	
<input type="checkbox"/>	7/25/2024	RS240725100832				June 2024 Speech Therapy	<input type="text"/>	Director	20	\$3,640.00	<a href="#">Problems on Voucher View Problems</a>
<input checked="" type="checkbox"/>	7/30/2024	RS240730071417				Occupational Therapy July 2024	<input type="text"/>	Director	4	\$600.00	

Select All    Total Billed: \$600.00

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

# 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

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



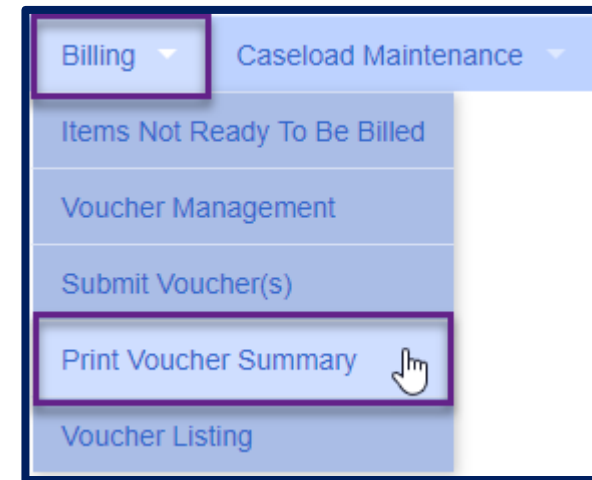




# Print Voucher Summary

# 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

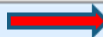
Home | File Transfer | Activities | Attendance | Billing | Caseload Maintenance | Lookup | Documents | Reports | Medicaid | People | My Account | Knowledge Base

### 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	<a href="#">Print</a>
RS200308133622	RS	FEBRUARY 2020	3/8/2020	\$2,926.00	3/8/2020	CCC-SLP	Betty P. Gebauer	Albany	11	 <a href="#">Print</a>
RS200213143706	RS	JAN. 2020	2/13/2020	\$3,993.00	2/14/2020	CCC-SLP	Betty P. Gebauer	Albany	10	<a href="#">Print</a>
RS200205073831	RS	JAN. 2020	2/5/2020	\$5,620.50	2/9/2020	CCC-SLP	Betty P. Gebauer	SCHENECTADY	22	<a href="#">Print</a>
RS200102193725	RS	DEC. 2019	1/2/2020	\$2,486.00	1/4/2020	CCC-SLP	Betty P. Gebauer	Albany	9	<a href="#">Print</a>

# Print Voucher Summary

\* You will then see voucher summary:

Printed: 6/17/2021 2:13:30 PM

**CPSE PORTAL** **Voucher Summary** Page 1 of 1

**Provider:** GEBAUER,BETTY **County:** SCHENECTADY  
**Vendor#:** 02061 **Bill Date:** 8/4/2019 **CPSE Voucher#:** RS190804113625  
**Tax ID:** **Submitted :** 8/19/19 04:09 PM **Vendor Invoice#:**  
**BEDS Code:** **Time Period:** 2019 - 2020 Summer **County Doc#:**  
**Voucher Description:** July 2019 **Contract Or Account#:**

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
<b>Grand Total:</b>								<b>\$927.00</b>

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:





# Attendance Denied by County?

# 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](mailto:support@cpseportal.com)
    - \* **RequestToHaveAttendanceRemovedFromSubmittedVouchers.xlsx**

# 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



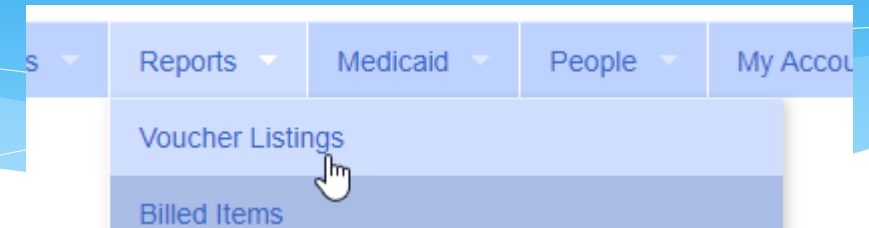
# How to Correct and Re-Bill

- \* Once the attendance is no longer on a voucher:
  - \* If you need to modify the treatment log:
    - \* Since the attendance has already been digitally signed attesting to the fact that everything was reviewed and correct, you must first unsign the attendance and indicate why you need to modify the signed treatment log. Here are instructions for unsigning attendance: <http://support.cpseportal.com/kb/a33/unsigned-attendance.aspx>
    - \* Once the attendance entry has been unsigned, it can now be modified.
    - \* The modified attendance entry needs to be **resigned**.
  - \* If the attendance needs to be moved to a different ESID because the original enrollment dates changed, was rescinded or attendance was entered on the wrong enrollment, 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.



# Reports

# 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 search criteria, and choose how you want to sort the report.

A screenshot of the 'Select Report Criteria' form. It includes fields for 'School Year' (2023 - 2024), 'Service Type' (RS), 'From Date' (04/01/2024), and 'To Date' (05/31/2024). Below these is the 'Sort Printed Report' section with a 'Sort By' dropdown menu showing options like 'BillingDate', 'VoucherNumber', 'VoucherDescription', 'CountyName', 'TotalBilled', and 'NumEnrollments'. The 'BillingDate' option is selected, and the 'Descending?' checkbox is checked. A 'Generate Excel' button is visible to the right.

# Voucher Listing Report

There are three options for running the report:

- \* Clicking retrieve will display the information in CPSE Portal.
- \* Clicking print Report will Print out a PDF of the report.
- \* Clicking generate Excel will open an excel spreadsheet with the report.

Select Report Criteria

School Year:	Service Type:	From Date:	To Date:
2023 - 2024 ▼	RS ▼	09/01/2023	05/31/2024

Sort Printed Report

Sort By:

NumEnrollments ▼  Descending?

[Add Another Sort](#)

Retrieve Print Report Generate Excel

# 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



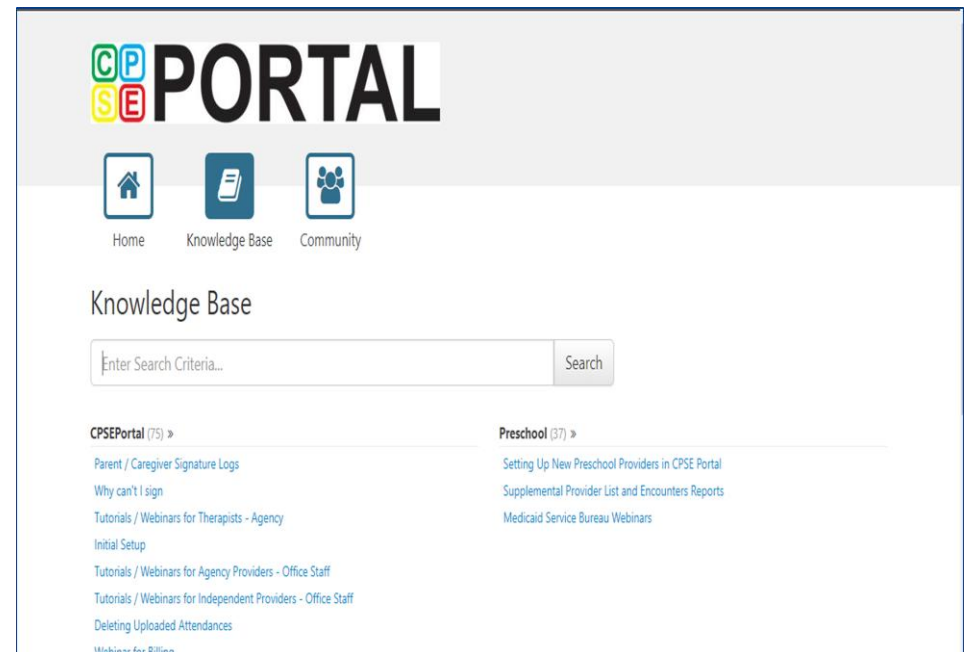
# Closing

# Important Note

- \* You **cannot** bill on Unmatched Enrollments. Therefore, you should be matching your children, and unmatched enrollments throughout the week.

# 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

- \* Credential verification by individual with login:
  - \* <http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx?KBSearchID=16524>
- \* 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

- \* Attendance Denied? How to Remove in Order 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=17204>
- \* Therapist Cannot Unsign a Session
  - \* <http://support.cpseportal.com/kb/a405/therapist-cannot-unsign-a-session.aspx?KBSearchID=25519>
- \* How to Unsubmit a Voucher
  - \* <http://support.cpseportal.com/kb/a445/how-to-unsubmit-a-voucher.aspx?KBSearchID=25519>
- \* 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](mailto: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