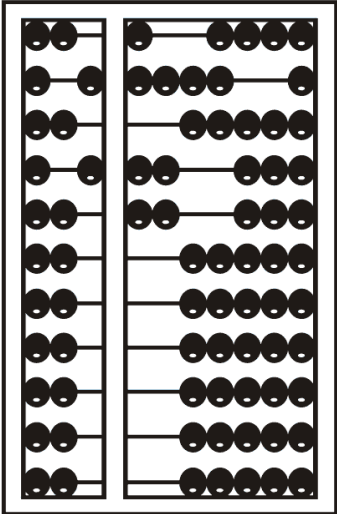


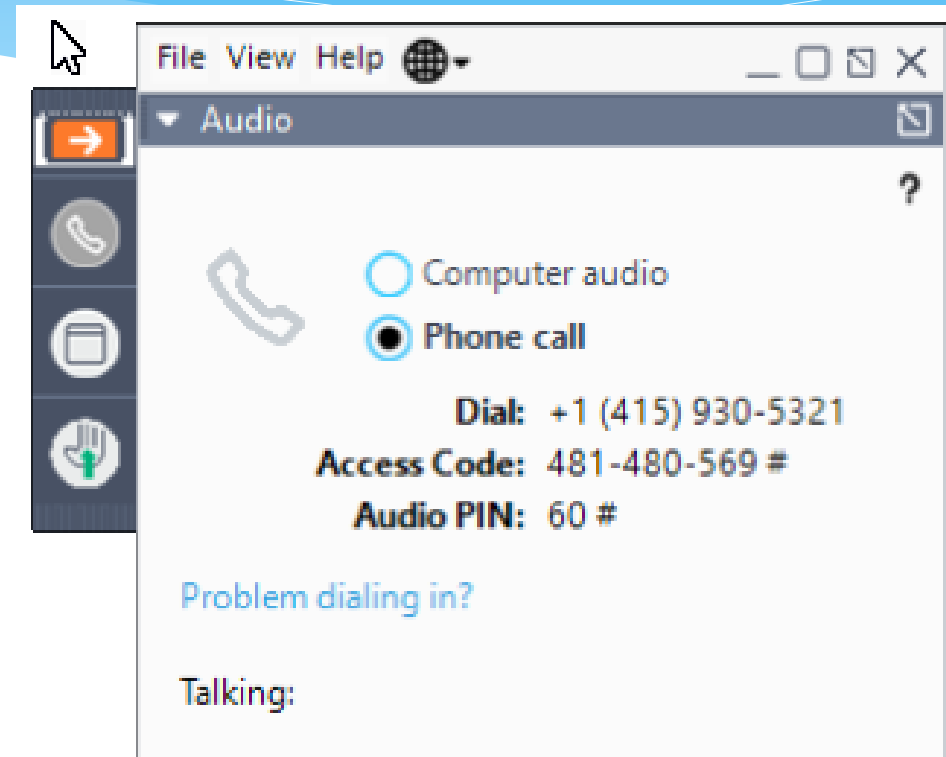
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Using Go To Webinar

Go To Webinar Control Panel

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

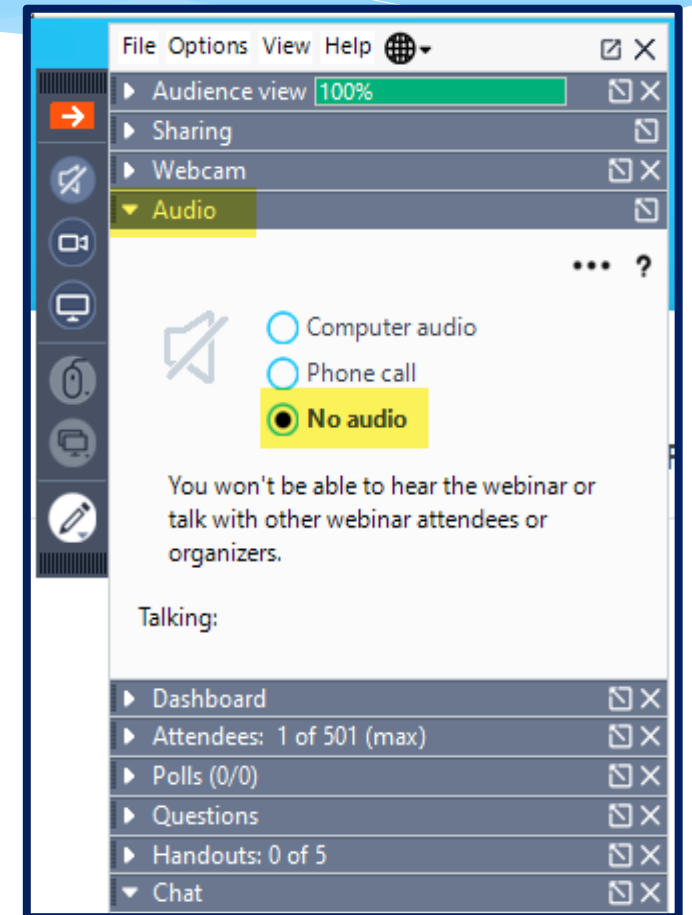
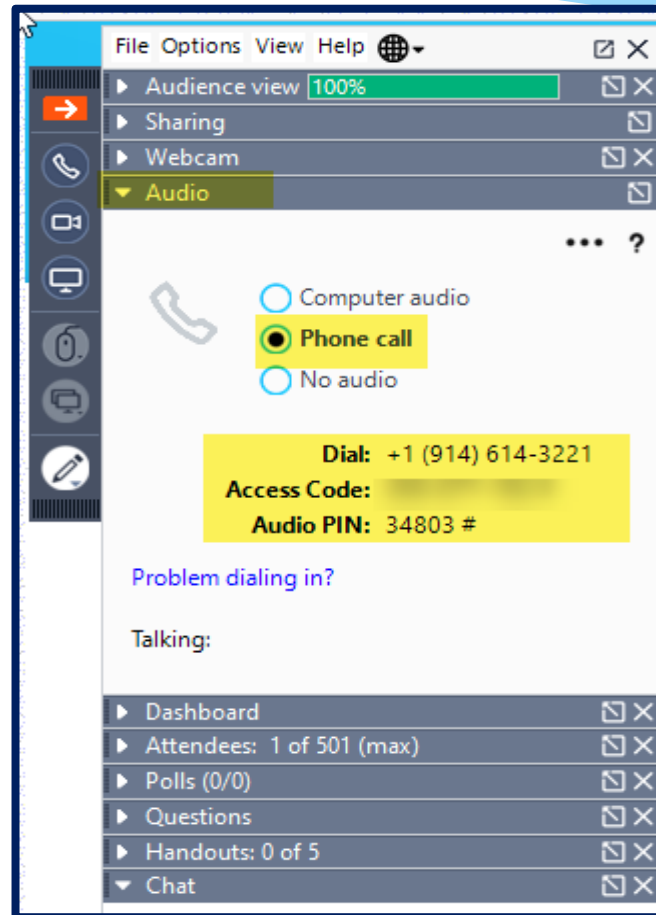
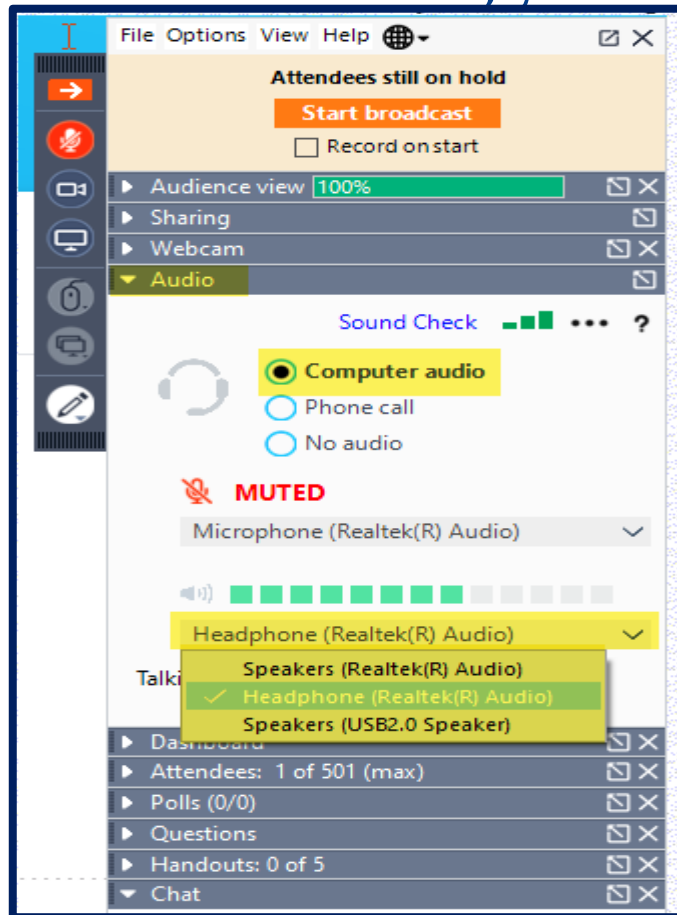


Communicating with Presenter

- * 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.

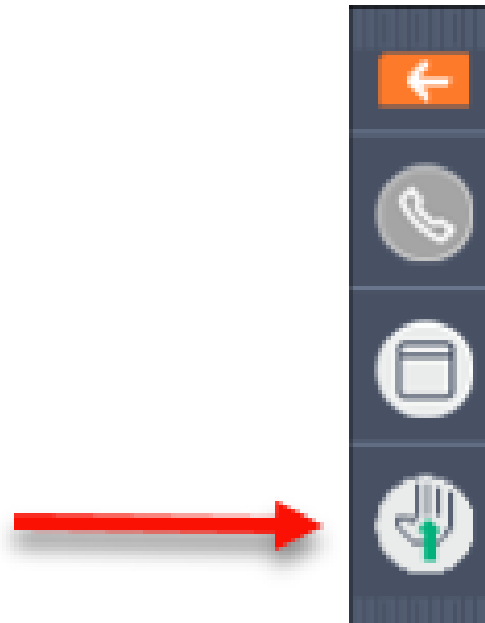
Can't Hear the Webinar?

* 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!



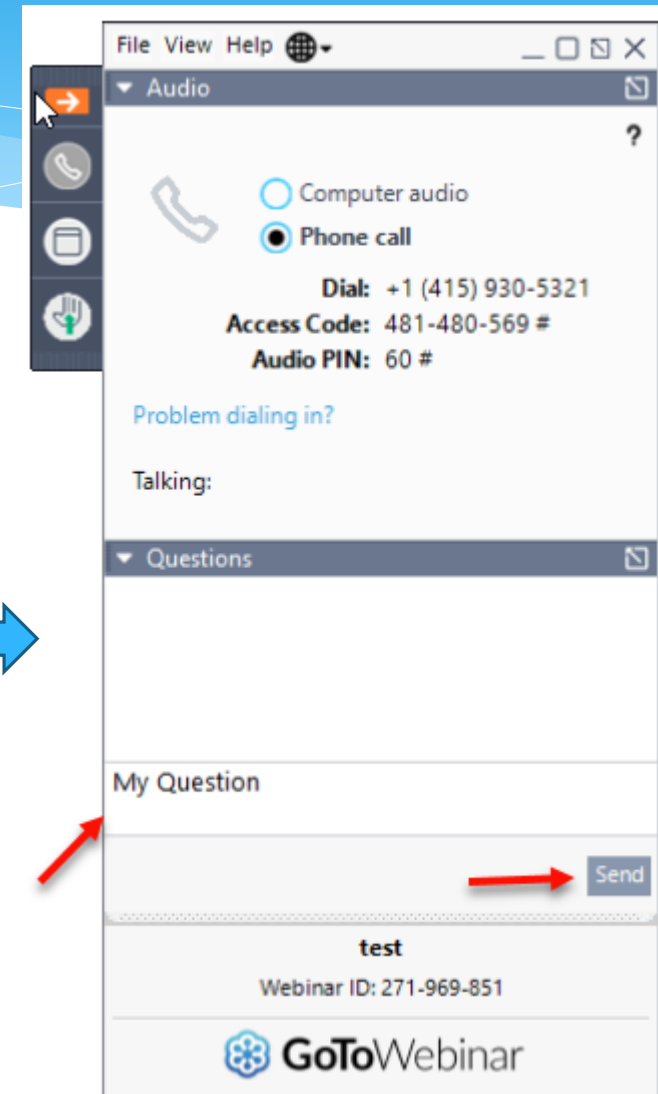
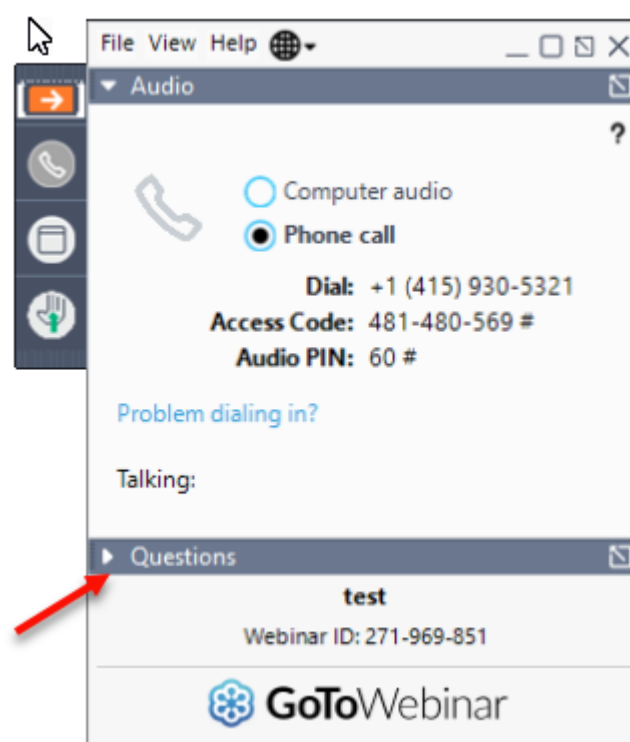
Raising your hand

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



Typing in a Question

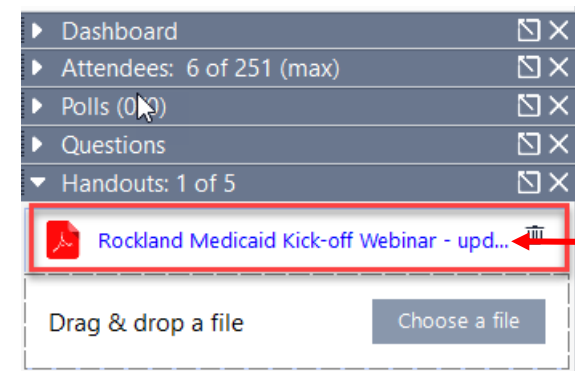
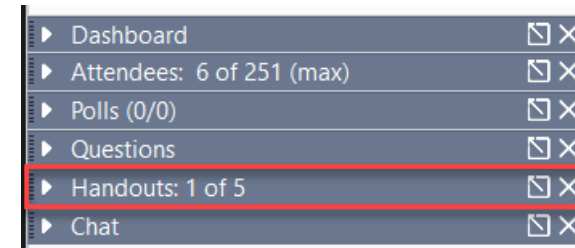
- * Click the question bar to expand questions section
- * Type in your question and click send



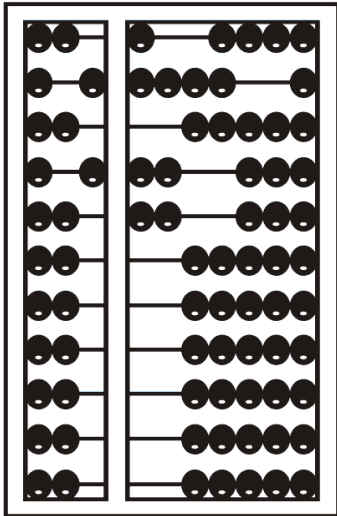
Handouts

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 Agency Billing – Using the CPSE Portal



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.) as well as non-licensed professionals that work under the direction of an SLP for speech therapy services (TSHH, TSSLD, etc.) provider will need to have their credentials verified.
- * Verification means that someone (**the therapist and/or agency staff**) 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.

The screenshot shows the CPSE Portal interface. At the top right, it says "Hello, Betty . You are currently logged in". The navigation menu includes Home, Activities, Attendance, Caseload Maintenance, Lookup, Reports, My Account, and Knowledge Base. The main content area is divided into sections: "User Profile" (with a "Hide" button), "My Professional Profile" (with a "Hide" button), "My License(s)", and "My signature".

User Profile

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

[Edit User Account](#)

My Professional Profile

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	Lookup	REQUIRES VERIFICATION	Verify

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 it is the same person.
- * 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 & 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

NYSED.gov Office of the Professions

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Online Services

Verifications

Licensees, by name
Licensees, by license number
Permits, by name
Pharmacy Establishments
Professional Business Entities (other than pharmacies)
Help with Searches
Terms of Use

Registration Renewal
Renewal Information

Verification Searches

The information furnished at this web site is from the Office of Professions' official database and is updated daily, Monday through Friday. The Office of Professions considers this information to be a secure, primary source for license verification.

License Information *

03/08/2021

Name : MCKEON CASANDRA PATRICIA
Address : MECHANICVILLE NY
Profession : SPEECH - LANGUAGE PATHOLOGY
License No: 020673
Date of Licensure : 12/16/2010
Additional Qualification : Not applicable in this profession
Status: REGISTERED
Registered through last day of : 04/22

* Use of this online verification service signifies that you have read and agree to the [terms and conditions of use](#). See [HELP glossary](#) for further explanations of terms used on this page.

* Use your browser's back key to return to licensee list.

Credential Verification by Agency Office Staff

- * Go to **People > Service Provider Credential Verification Listing**
- * Click “Verify” for staff members that need to be verified.
- * Office staff will need to verify the same information that the service provider does.
- * Be sure to compare the **two exactly**, as you are attesting that the information in the Portal is accurate.



Filters

County: All Counties | Provider: ACHIEVEMENTS | Retrieve

Profession: All Professions | Include Previously Verified

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



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:**

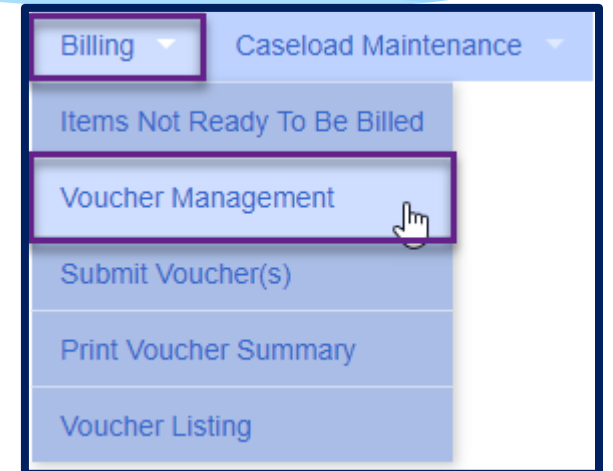
- * This screen is used to add new monthly billing items (and their corresponding attendances) to a voucher, you use this screen. On the left are monthly items that are ready for billing, but not on any voucher yet. On the right are monthly items currently on this voucher. Note: Attendances won't be 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”



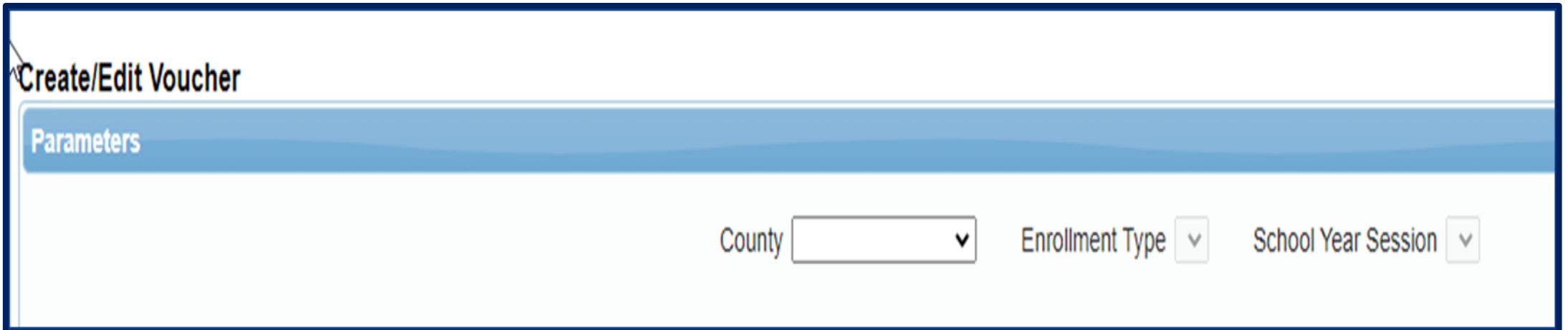
Recalc All Create Voucher 

Pending Vouchers

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

Creating a Voucher

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



The screenshot shows a web interface for creating or editing a voucher. At the top left, there is a title "Create/Edit Voucher" with a mouse cursor pointing to it. Below the title is a section labeled "Parameters" with a blue header. Underneath the header, 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.
- * You can fill in the Service Month From & Service Month to dates. The only notes that will then populate to bill for will be those dates chosen.

Create/Edit Voucher

Parameters

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

Service Month From Service Month To

Creating a Voucher

* Voucher for CB and SEIT:

- * **Center Based program (CB)** - students will be grouped together under the SED Program Code that you choose (I.E. – all 9160 students will be billed together).
 - * Also, CB programs can be billed with no attendances, but most counties require attendance. You should follow your county's rules.
- * **SEIT** – all students receiving SEIT will be grouped together.

Create/Edit Voucher

Parameters

County	<input type="text" value="SCHENECTADY"/>	Enrollment Type	<input type="text" value="CB"/>	School Year Session	<input type="text" value="2024 - 2025 Winter"/>	SED Program Code	<input type="text" value=""/>
		Service Month From	<input type="text" value=""/>	Service Month To	<input type="text" value=""/>		<input type="text" value="9100"/>
							<input type="text" value="9160"/>

Creating a Voucher

* Voucher for RS or CBRS:

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

Create/Edit Voucher

Parameters

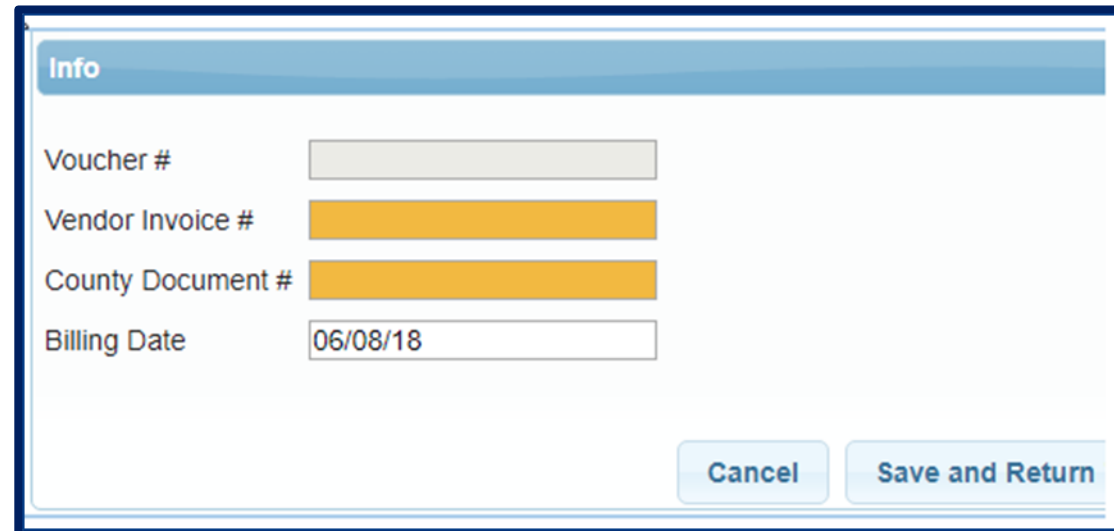
County Enrollment Type School Year Session Related Service Code

SED Program Code

Service Month From Service Month To

Creating a Voucher

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



Info

Voucher #

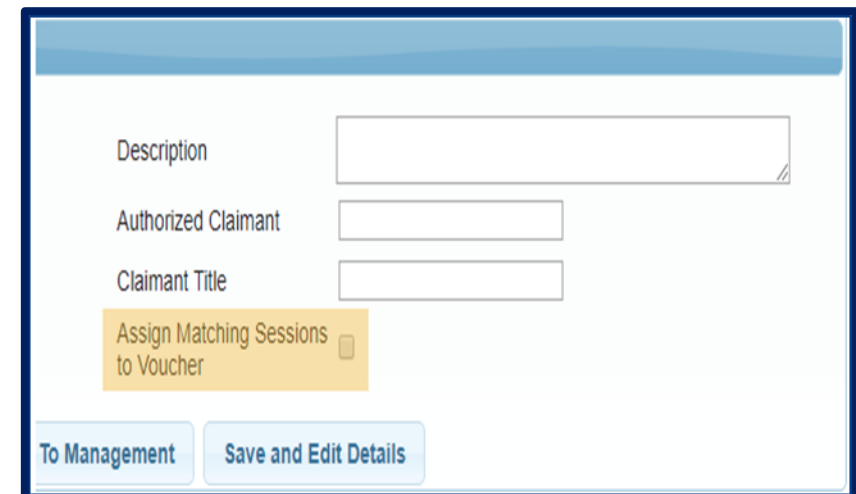
Vendor Invoice #

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 SEIT)
- * Authorized Claimant – for independent provider this is the therapist. For agency this is the billing admin.
- * Claimant Title – title of claimant (ex. President)
- * Click Save and Return to Management



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

- Description:** A text input field.
- Authorized Claimant:** A text input field.
- Claimant Title:** A text input field.
- Assign Matching Sessions to Voucher:** A checkbox, which is currently checked and highlighted with a yellow background.
- To Management:** A button.
- Save and Edit Details:** A button.

Creating a Voucher

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

Create/Edit Voucher

Parameters

County Enrollment Type School Year Session SED Program Code

Service Month From Service Month To

Info

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

Creating a Voucher

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



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

Creating a Voucher

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

January 2023 Service Code: Filter

January 2023 Program Code: 9100

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


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

Creating a Voucher

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

Assigned

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



Creating a Voucher

Voucher Details

Info

Voucher#:

Vendor Invoice#

County Doc #

Billing Date:

Contract Number:

Description:

Authorized Claimant:

Claimant Title:

[Update](#)

A=Adjustment R=Regular

January 2023 Service Code:

January 2023 Program Code:

Unassigned

Assigned

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

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

[Assign -->](#)

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

[<-- Unassign](#)

Creating a Voucher

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

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

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

Assign --> <-- Unassign

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

Amount Billed: \$0.00



Missing Attendance

Why Doesn't Attendance Appear on my Voucher?

- * There are several reasons why attendances are not available to be put on a voucher. On the Voucher Details Screen, attendances will not appear on the list of items to put on a voucher for the following reasons:
 - * **The attendance has been added or modified (matched, signed/co-signed) since the voucher was created:**
 - * Try using “Recalc” to have system look for ready attendances.
 - * **The attendance is on an unmatched enrollment (no ESID):**
 - * Match to County Created enrollment and use “Recalc”.
 - * **The attendance is missing a Signed Date or Cosigned Date:**
 - * Have the therapist/supervisor sign or co-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 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.
- * You should continually be reviewing your Items Not Ready To Be Billed report.

Items Not Ready to Bill

- * Another way to see why attendance doesn't appear on your voucher is to run an Items Not Ready to Bill Report.

- * Go to **Billing** -> **Items Not Ready To Be Billed**

- * This report will not show unmatched children or unmatched enrollments, but does show:

- * Attendances missing signatures
- * Attendances not co-signed
- * Attendances are outside of enrollment dates



Items Not Ready to Bill

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

Items Not Ready To be Billed

Filters

Provider: County: *

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

Enrollment Type: Service Type: Program Code:

Items Not Ready to Bill

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

Items Not Ready To be Billed															
Filters															
Provider:	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 see the confirmation: *Attendances Moved Successfully*.
- * Dates in red are dates that are outside of the enrollment dates, and need to be moved.

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	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009573			CB	9/8/2021	12/17/2021		5 hrs/day	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CBRS2122W0035916			CBRS	9/8/2021	12/17/2021	ST	3x30	I	Select

Selected Enrollment Info

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

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

Move Attendance Between Enrollments

Move Attendance Between Enrollments

School Year Session: Provider: Last Name:

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

Selected Enrollment Info

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



Submitting Vouchers

Submitting a Voucher

* To submit voucher(s) to county, go to **Billing** -> **Submit Voucher(s)**.

* Select unbilled voucher by checking box (or Select All).



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

ULSTER CB

Select any Unbilled Vouchers

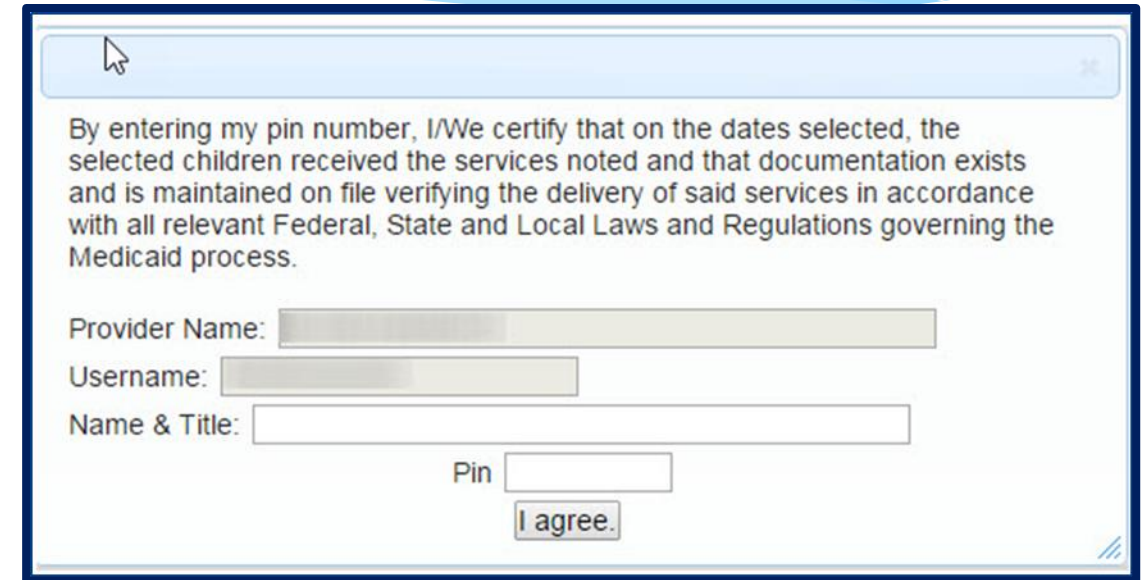
Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed
<input checked="" type="checkbox"/>	1/11/2022	CB220111104807							18	\$52,452.00

Select All Total Billed: \$52,452.00

Submit Voucher(s)

Submitting a Voucher

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



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

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

Provider Name:

Username:


Name & Title:

Pin

NOTE: Once you submit a voucher to the county, it is **NO** longer possible to edit 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 .



Voucher Summary

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


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

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

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

Voucher Summary

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



Classroom Attendance

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


	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F
Child Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
	A																														
BARRIOS, CLINT	A	A	A			A	A	A	A	A			A	A	A	A	A			A	A	A	A								
CLIFTON, CONSUELA																															
DOCKERY, EDWARD																															
GRANADOS, EFREN	A	P	P			P	A	A	A	A			P	P	P	P	P			P	P	A	P								
KENNY, LUPE	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	A	P								
LEUNG, ANDERSON	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	P	P								
MALLORY, JEAN	P	P	P			P	P	P	P	P			P	P	P	P	P			P	P	P	P								
MCLAIN, TOD	P	P	P			A	A	A	A	A			P	P	A	P	P			P	A	A	A								
ORNELAS, PHYLLIS	P	A	P			P	P	P	P	P			P	P	P	P	P			P	P	P	A								
REEDER, PAUL																															
WU, ELVIN	P	P	P			A	A	A	A	P			A	P	A	A	P			P	P	A	A								

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

Signature:

Center Based Related Service - CBRS Voucher

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



Voucher Summary

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Provider:
Vendor#:
Tax ID:
BEDS Code: 620600998101
Voucher Description:

Bill Date: 10/27/2021
Submitted :
Time Period: September 2021

County: ULSTER
CPSE Voucher#: CBRS211027112902
Vendor Invoice#:
County Doc#:
Contract Or Account#:

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

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

Authorized Signature: _____ **Certification:** _____

Information to Send to County

- * What is needed to send to the County:
 - * Mail the signed voucher summary.
 - * If you are completing a Center Based (CB) voucher, you must also complete a Center Based Related Service (CBRS) voucher.
 - * Include the Parent Signature Logs.
 - * Any other miscellaneous items or paperwork that the County requires.

Cannot Submit Voucher

Problems on Voucher

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

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

MONTGOMERY SEIT

Select any Unbilled Vouchers

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

Select All Total Billed: \$0.00

Problems on Voucher – View Problems

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

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

Problems on Voucher – Attendance Issue

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

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

Treatment Log

- * When you look at the treatment log / session note, you will see that there is not a location listed. All Medicaid billable notes must contain a location.

CPSE PORTAL				Treatment Log				
Child Name			DOB		Billing Provider		NPI	
Service			Individual/Group	IEP From	IEP To	District	County	
Speech Therapy			Individual	09/07/23	06/21/24	ELMONT UFSD	NASSAU	
Frequency			ESID		Rendering Provider	License	NPI	
3x30			CBRS2324WC					
Date Of Service			Time In	Time Out	Duration	# in Group	Supervising Provider (UDO/USO)	
11/01/23			11:00 AM	11:30 AM	30		License	
Setting			Location		Referring Provider		NPI	
Therapy Room								
CPT	Units	Minutes	Description		ICD	Description		
92507	1		TREATMENT OF SPEECH, LANGUAGE, VOICE,		F80.2	Mixed receptive-expressive language disorder		
Session Notes: Activity Related to IEP Goals (including objectives and measures of success) and response(s) of child [caterpillar preposition activity]:Identified preposition in 2/4 opportunities (in, out, on) given moderate verbal cues . [food basket]Verbally requested I want+ food, open, close given moderate visual, verbal cues. Answered yes/no questions given visual and verbal cues with yes/no chart about the therapy room.								
Rendering Provider		Name, Title and Credentials			NPI	License	Date Signed	Signature Method
UDO/USO Supervisor							11/03/23	DIGITAL
QA Review								

Other Possible Problems

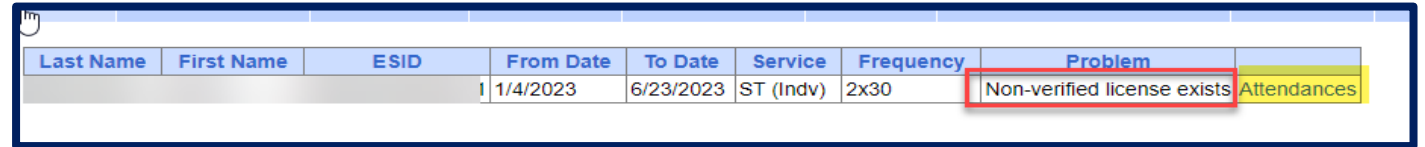
- * When submitting the voucher, you may have problems listed below:
 - * **Invalid CPT Code Units** – you cannot have zero units for a CPT code.
 - * **Duplicate CPT Codes for Attendance** – you cannot have duplicate CPT codes. You can have multiple codes with a specific number of units.

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

Other Possible Problems

* Non-verified License Exists:

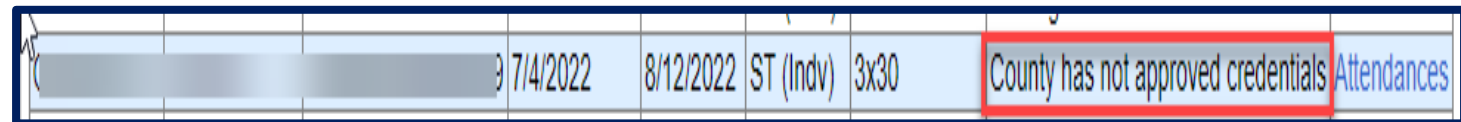
- * Click on the “Attendances” to see who the service provider is.
- * Go to **People -> Service Provider Credential Verification Listing** and verify credentials of therapist.
- * Once credentials are verified you will need to “Recalc” your voucher.
- * Your county will then approve credentials.



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

* County Has Not Approved Credentials:

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



			7/4/2022	8/12/2022	ST (Indv)	3x30	County has not approved credentials	Attendances
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Problem of “Not Co-Signed”

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



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

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

Service Date	Type	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	
04/27/22	Provided Treatment Session			10:00 AM	10:30 AM	30	1.00	30	Michelle	Therapy Room	G	04/29/22	05/24/22	CBRS220608144019	Treatment Log
05/04/22	Provided Treatment Session			10:00 AM	10:30 AM	30	1.00	30	Michelle	Classroom	G	05/06/22	05/24/22		Treatment Log Details
05/12/22	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30	Michelle	Therapy Room	G	05/13/22	05/24/22		Treatment Log Details
05/19/22	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30	Michelle	Therapy Room	G	05/23/22	05/24/22		Treatment Log Details
05/26/22	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30	Michelle	Therapy Room	G	05/31/22			Treatment Log Details
06/02/22	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30	Michelle	Therapy Room	G	06/06/22			Treatment Log Details

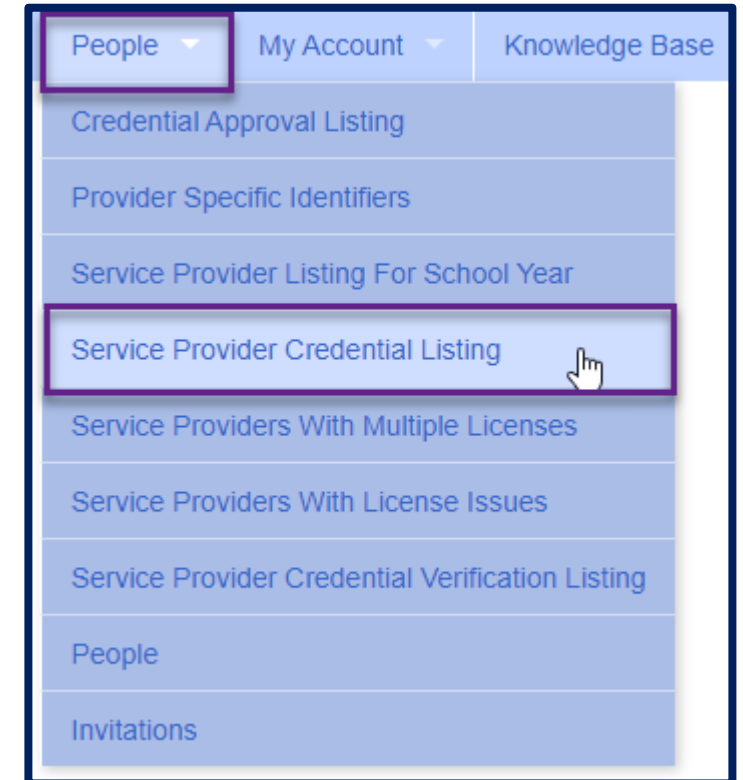
Problem of “Not Co-Signed”

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

Problem of “Not Co-Signed”

Step 1

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



Problem of “Not Co-Signed”

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


Service Providers Listing with Credentials

Filters

County Provider

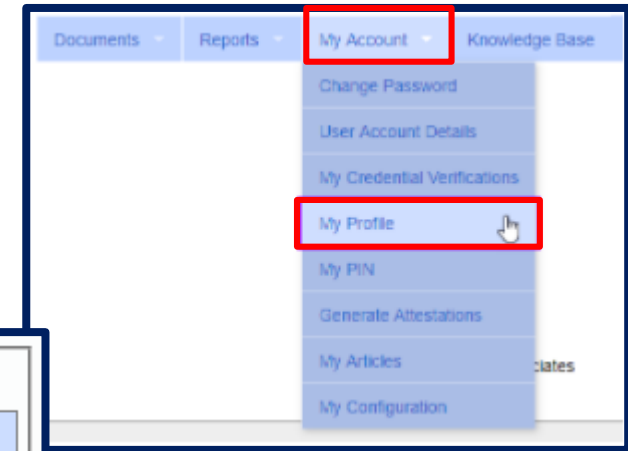
Active on:

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



Problem of “Not Co-Signed”

- * You may have the therapist correct this (They must have a login to the CPSE Portal to do so):
- * The therapist will go to **My Account -> My Profile**
- * Click “*Edit*” next to the corresponding credential line:



Licenses / Certifications / Professions [NYS Office of the Professions]										
	Description	Credential Type	#	State	NY Profession Code	From	To	Active		
SLP	Licensed Speech & Language Pathologist	License	008342	NY	058	12/20/1994	4/30/2020	<input type="checkbox"/>	Edit	Remove

[Add](#)

- * Update with the necessary end date and click “*Save.*”

Problem of “Not Co-Signed”

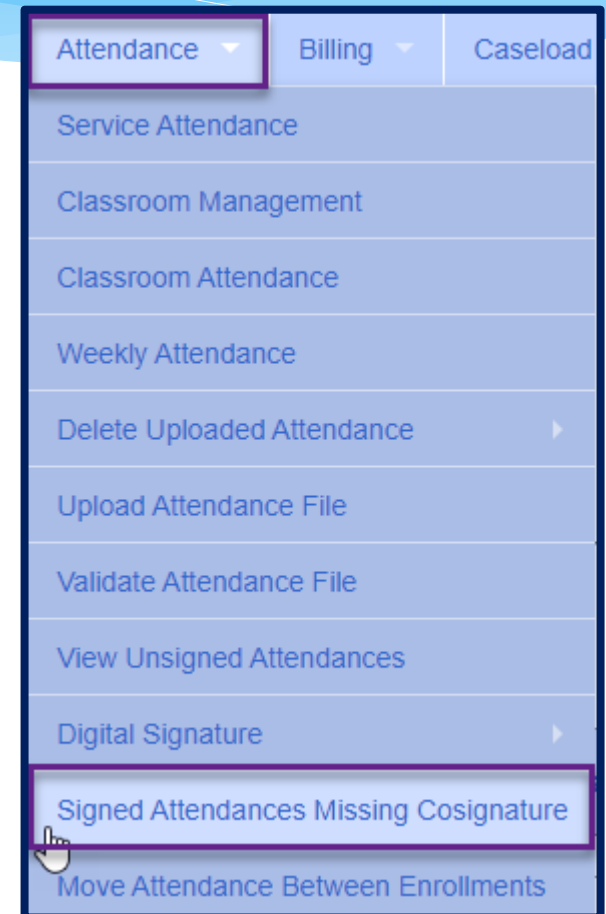
Step 2

- * After the credential dates are updated, the Credential Verification will also need to be re-done. This can be done by the agency or the service provider.
- * Below are the links for the Knowledge Base Articles on Credential Verification:
 - * **Agency:**
 - * <http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx?KBSearchID=14295>
 - * **Providers:**
 - * <http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx?KBSearchID=14295>

Problem of “Not Co-Signed”

Step 3

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



Problem of “Not Co-Signed”

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

Signed Attendances Missing Cosignature

Filters
School Year:

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

NOTE:

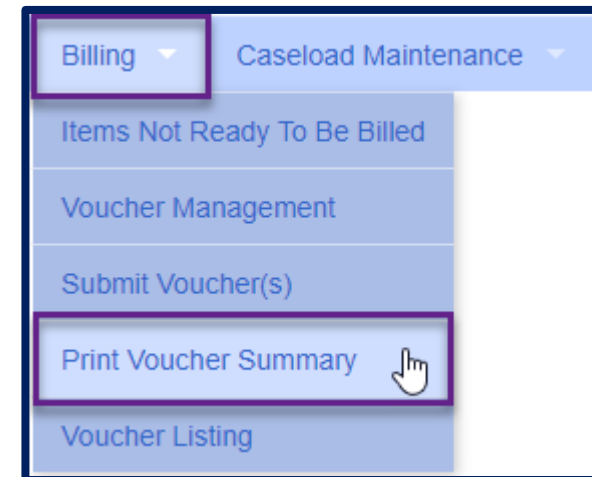
- * If the credentials were not changed, and the problem was pointing to the Credential Verification; simply complete the credential verification as noted in Step 2.
- * Not all counties require the electronic credential verifications.



Print Voucher Summary

Print Voucher Summary

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



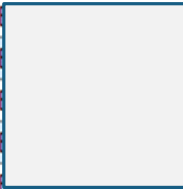
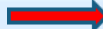
Print Voucher Summary

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

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

Print Voucher Summary Reports

Filter By...
School Year Session: (All School Year Sessions) Enrollment Type: (All Enrollment Types) County: (All Billed Counties) Billing Month: (All Billing Months) Service Month: (All Service Months) Voucher Status: (Any Voucher Status)
[Apply Filter](#)

Voucher #	Enrollment Type	Description	Billing Date	Total Billed	Submitted Date	Claimant Title	Authorized Claimant	Destination County	# Enrollments	Print All Voucher Submission Reports
RS200308133551	RS	FEB. 2020	3/8/2020	\$4,261.50	3/8/2020	CCC-SLP		SCHENECTADY	22	Print
RS200308133622	RS	FEBRUARY 2020	3/8/2020	\$2,926.00	3/8/2020	CCC-SLP		Albany	11	 Print
RS200213143706	RS	JAN. 2020	2/13/2020	\$3,993.00	2/14/2020	CCC-SLP		Albany	10	Print
RS200205073831	RS	JAN. 2020	2/5/2020	\$5,620.50	2/9/2020	CCC-SLP		SCHENECTADY	22	Print
RS200102193725	RS	DEC. 2019	1/2/2020	\$2,486.00	1/4/2020	CCC-SLP		Albany	9	Print

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: **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
Grand Total:								\$927.00

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

Authorized Signature: _____ **Certification:** _____

Print Voucher Summary

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



- * **NOTES:**

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



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**
 - * **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

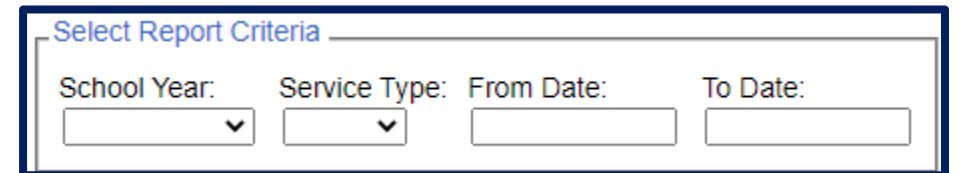
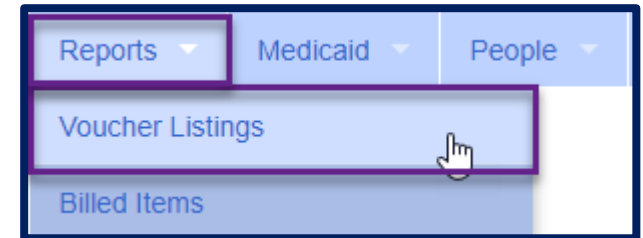
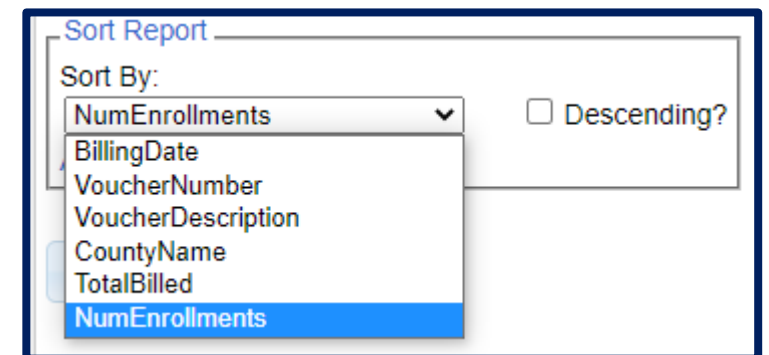
- * Once the attendance is no longer on a voucher:
 - * If you need to modify the treatment log:
 - * Since the attendance has already been digitally signed attesting to the fact that everything was reviewed and correct, you must first unsign the attendance and indicate why you need to modify the signed 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 Criteria, and choose how you want to sort your report.

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

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.

The screenshot displays the 'Select Report Criteria' section with the following fields: School Year (2023 - 2024), Service Type (RS), From Date (09/01/2023), and To Date (05/31/2024). Below this is the 'Sort Printed Report' section, which includes a 'Sort By' dropdown menu set to 'NumEnrollments' and a 'Descending?' checkbox. At the bottom of the form are three buttons: 'Retrieve', 'Print Report', and 'Generate Excel'.

Select Report Criteria

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



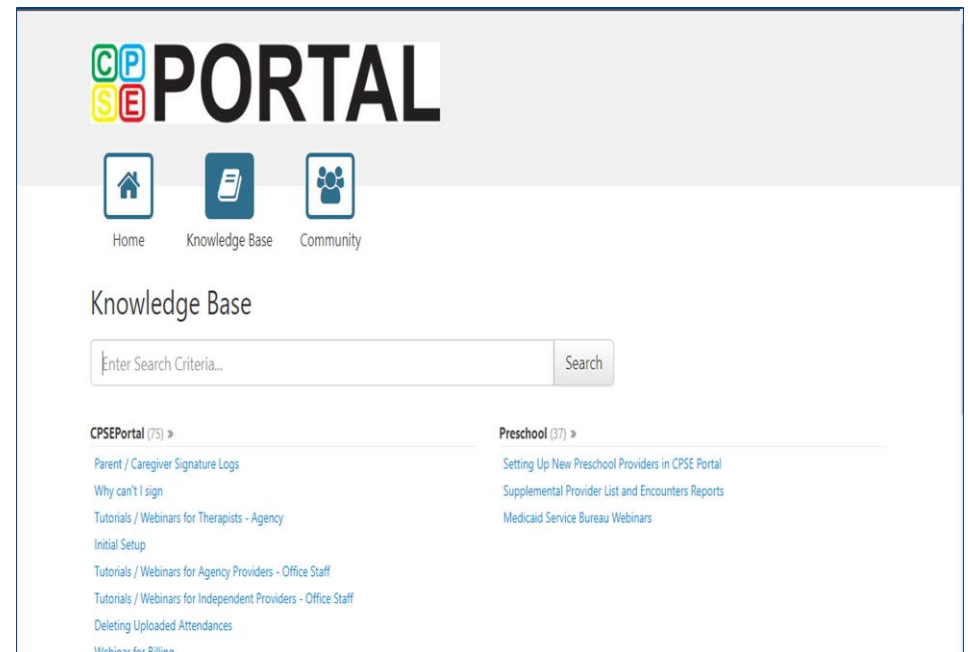
Closing

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 – Portal Invites & Credential Verification

- * Portal Invitations – Multiple User Template Upload
 - * <http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175>
- * Credential verification by individual with login:
 - * <http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx?KBSearchID=16524>
- * Credential verification by agency office staff
 - * <http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx?KBSearchID=16524>
- * Cannot Submit Voucher: Problem of “Not Co-Signed”
 - * <http://support.cpseportal.com/kb/a230/cannot-submit-voucher-problem-of-not-co-signed.aspx?KBSearchID=17202>

Helpful Knowledge Base Articles – Creating Vouchers

- * 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>

- * How to Tell What is Missing from My Session

- * <http://support.cpseportal.com/kb/a460/how-to-tell-what-is-missing-from-my-session.aspx?KBSearchID=25519>

Helpful Knowledge Base Articles – Creating Vouchers

- * 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>

- * 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>

- * 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

- * In addition to the Portal Knowledge Base, our Helpdesk is available through email at support@CPSEPortal.com
- * When sending an email:
 - * Do **not** use child's name
 - * Use ESID #, Child # or STAC ID #
 - * Include your county, and info needed