Go To Webinar Control Panel

* Control panel is on far right of screen

* Orange button with white arrow expands and shrinks control panel
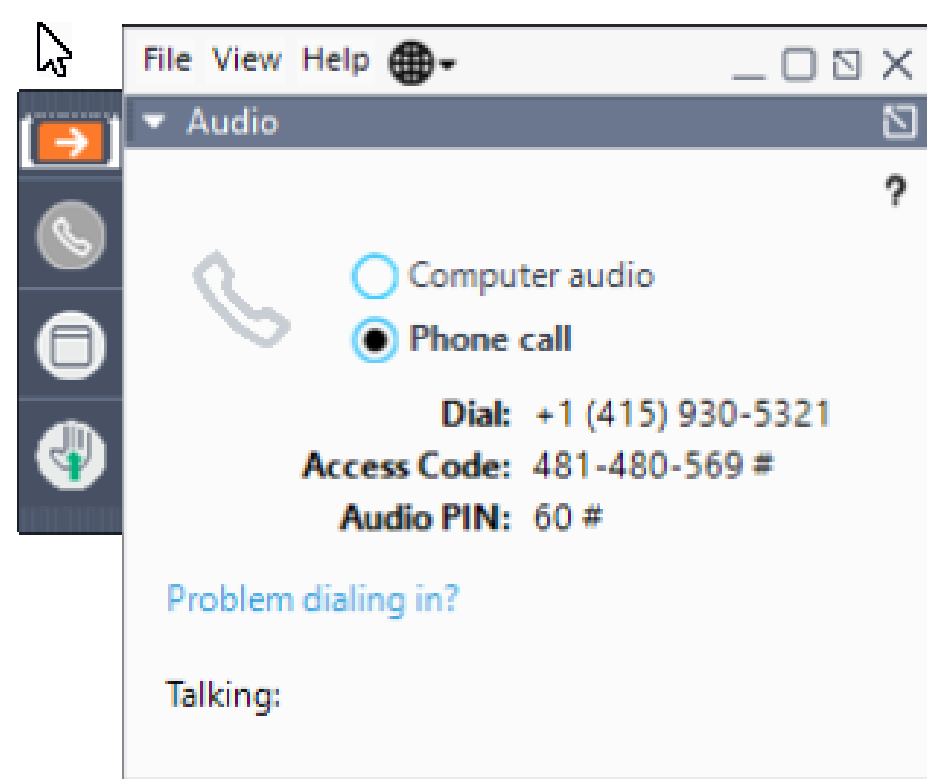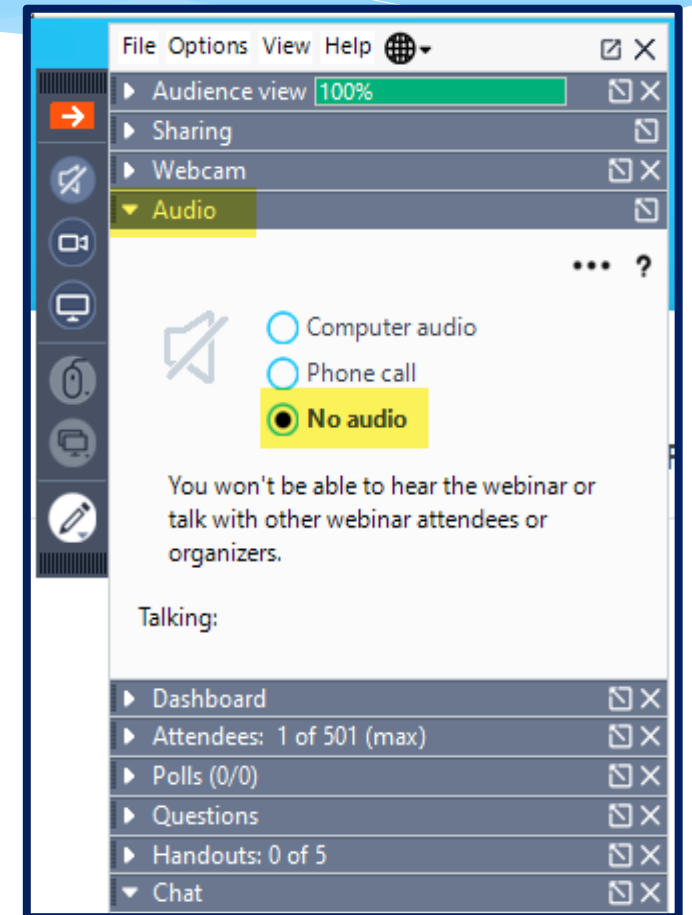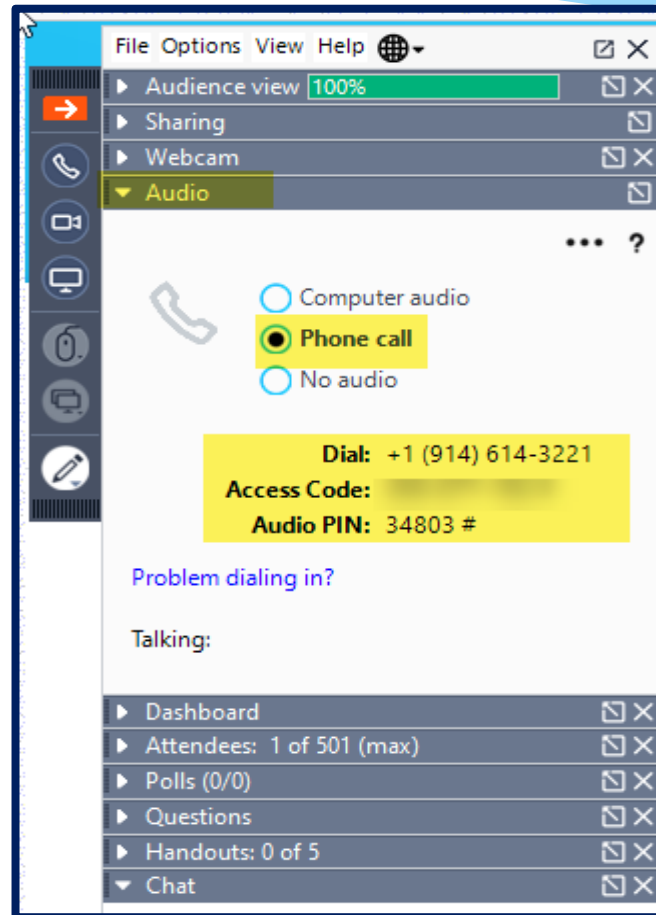
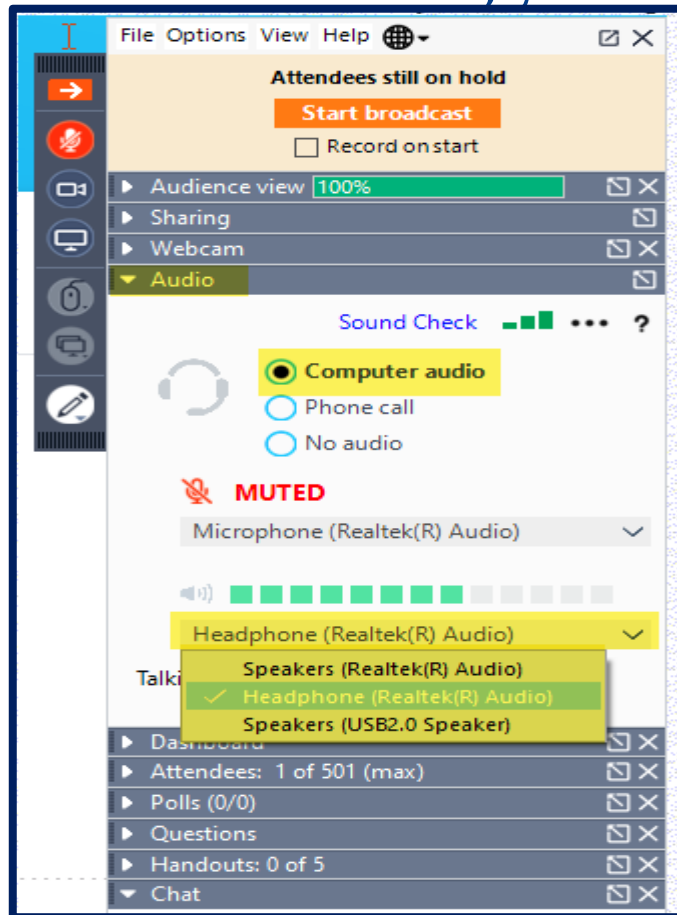# Communicating with Presenter

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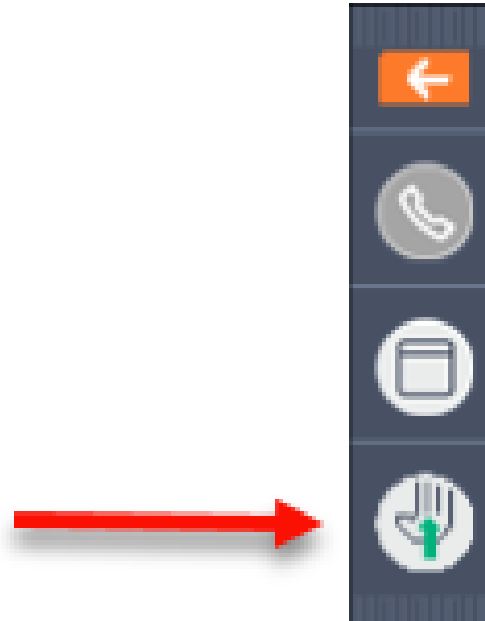
Under the Audio tab, you can choose Computer Audio, Phone Call or No Audio. If you choose No Audio, you will not be able to hear the webinar!

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
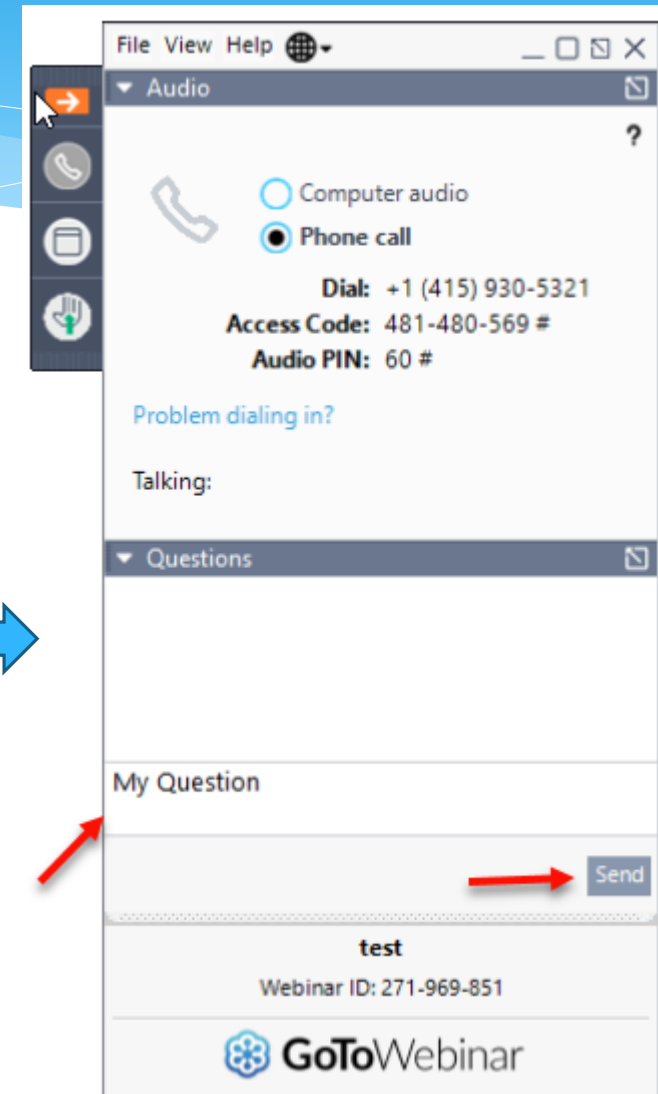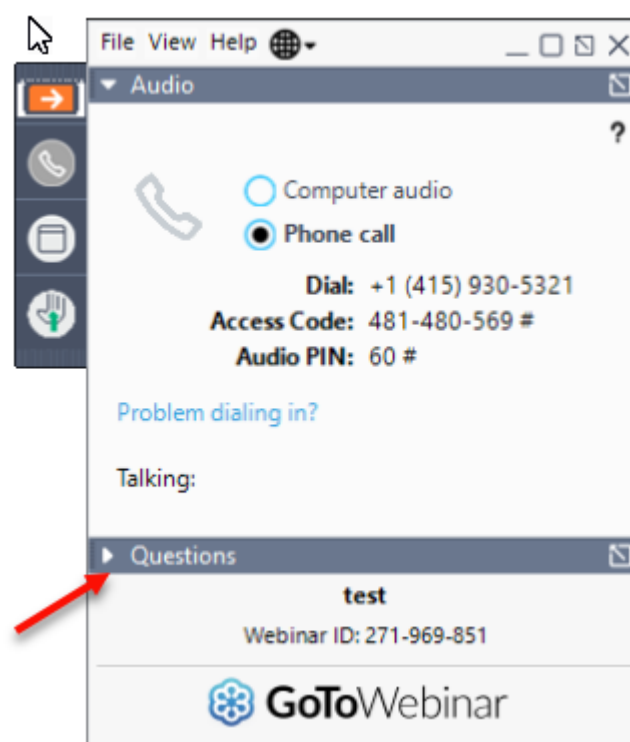
Handouts

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.

JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

CPSE Portal Billing –
Using an Outside System

Review of Import Person with License Template

Review of Import Person with License Template

* All agency service providers need to imported into the CPSE Portal.

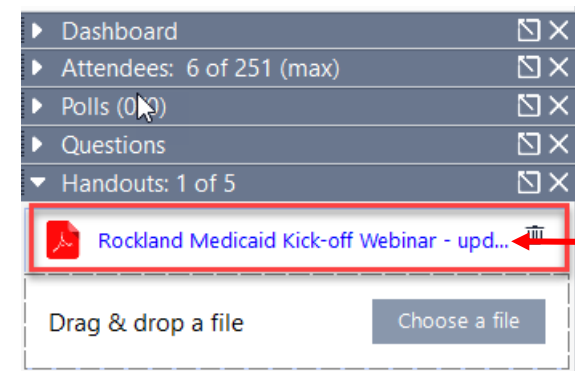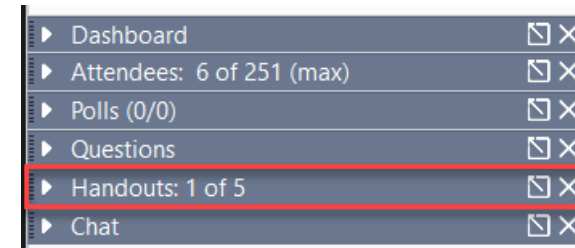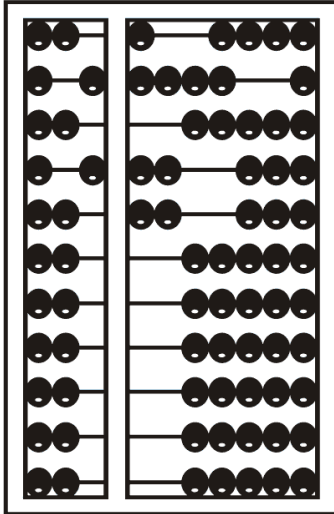* Only use this upload for individuals that will **NOT** be logging into CPSE Portal.

* The agency can add multiple service providers at once by completing the template shown below. When complete, this template is imported and all service providers listed in the template will be added to the CPSE Portal..

	A	B	C	D	E	F	G	H
1	First Name	Last Name	NPI	ProviderSpecificID	Profession Code	NY License	License From Date	License To Date
2								
3								
4								
5								

Review of Import Person with License Template

* The columns in template are:
  * First Name (required)
  * Last Name (required)
  * NPI (must have NPI # or Provider Specific ID)
  * Provider Specific ID - ID to link therapist to another system when NPI isn't present
  * Profession Code (required) - use one of the values from the Profession Codes list
* The following fields are only required for professionals that are licensed through the NYS Office of Professions (OT, PT, SLP, etc.) For professionals that do not have a NY license (teachers, etc.), leave the columns blank.
  * NY License - For professionals that do not have a NY license (teachers, etc.), leave the column blank.
  * License From Date - Effective Starting Date of the license
  * License To Date - Expiration Date of the license

	A	B	C	D	E	F	G	H
1	First Name	Last Name	NPI	ProviderSpecificID	Profession Code	NY License	License From Date	License To Date
2								
3								
4								
5								

Portal Profession Codes

* The Portal Profession Codes must be entered on the template.

* The list of Professional Codes can be found in the Knowledge Base article below:

  * http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175 or (search for "template")

The list of profession codes that can be used:

Profession Code	Description
AIDE	Classroom or 1:1 AIDE
AUD	Audiologist
CFY	Clinical First Year
COTA	Certified Occupational Therapist Assistant
CSP	Certified School Psychologist
CSW	Clinical Social Worker
INT	Bilingual Interpreter
LCSW	Licensed Clinical Social Worker
LMSW	Licensed Master Social Worker
LPN	Licensed Practical Nurse
MUS	Music Therapist
OT	Occupational Therapist (Registered)
OTA	Occupational Therapist Assistant
PSY	Licensed Psychologist
PT	Physical Therapist
PTA	Physical Therapist Assistant
RN	Registered Nurse
SLP	Speech & Language Pathologist
SPED	Special Education Teacher
TD	Teacher of the Deaf
TEACH	Teacher
TSHH	Teacher of Speech & Hearing Handicapped
TSLD	Teacher of Speech & Language Disabilities
TVI	Teacher of the Visually Impaired

Review of Credential Verification

Review of Credential Verification

* For most counties, only a licensed professional's credentials need to be verified.
* This includes SLP, OT, OTA, PT, PTA, LMSW, LCSW, etc. They can be found on http://www.op.nysed.gov/.

* Some counties require non-licensed professionals (teachers, school psychologists, etc.) to verify their credentials. Many non-licensed professionals do not have NPI numbers so it becomes only a name verification. Check with your county to see if non-licensed professionals need to verify their credentials.

* Individuals that are not licensed, but can work under the direction / supervision of a licensed professional. These include CFY, Limited Permit OT, Limited Permit PT, TSHH, TSSLD.

Who Can Complete the Verification Process?

* A licensed professional that does not have a login to CPSE Portal (because their agency uploads data from another system), can verify their own credentials using their NPI and license number.

* An agency can verify the credentials of any service provider that works for them.

Credential Verification for Therapists Without a Login

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

Credential Verification by Agency Office Staff

* Go to **People > Service Provider Credential Verification Listing.**

* Click "Verify" for the therapist needing to be verified.

Credential Verification by Agency Office Staff

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

Credential Verification by Agency Office Staff

* Once you have confirmed that all of the data is accurate and all of the "verify" boxes are checked, click "I attest."

* The prompt to enter your pin will then pop up. Your name and signature will auto-populate based upon your profile on CPSE Portal.
  * Enter pin and select "I agree."

* You will then see the confirmation underneath the verification.

Credential Verification by Agency Office Staff

* If you get this message:

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

* This means, that you do not have your Signature Title and Credentials filled out. This does NOT have to do with the service provider you are verifying, but rather the agency admin.

* You will need to go to My Profile and add this in.

My Profile

| Personal and Professional | User Information | Favorites ▾ |

Information in CPSE Database

Last Name: Signature

First Name: Example

NPI:

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

Update

| Personal and Professional | User Information | Favorites ▾ |

Information in CPSE Database

Last Name: Signature

First Name: Example

NPI:

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

Update

Schema Attendance File

What is an ESID

* ESID is the abbreviation for Electronic Service ID number. It is the number that identifies the child and the child's particular enrollment in the Portal.

* The CPSE Portal gives each County created enrollment a unique identifier called the ESID. This is how we reference enrollments.

* In order to be in compliance with HIPAA you should reference all preschool children by their ESID #, not their name.   If you need to contact the help desk, you should ALWAYS reference the child's ESID #, and **NOT** the child's name.

Schema Attendance File

* A billing provider can create a schema file and upload it into the CPSE Portal instead of entering it directly.

* Below is the Knowledge Base article containing the schema information needed:
  * *http://support.cpseportal.com/kb/a67/schema-for-attendance-file-upload.aspx?KBSearchID=17037*

County Codes for Schema Attendance File

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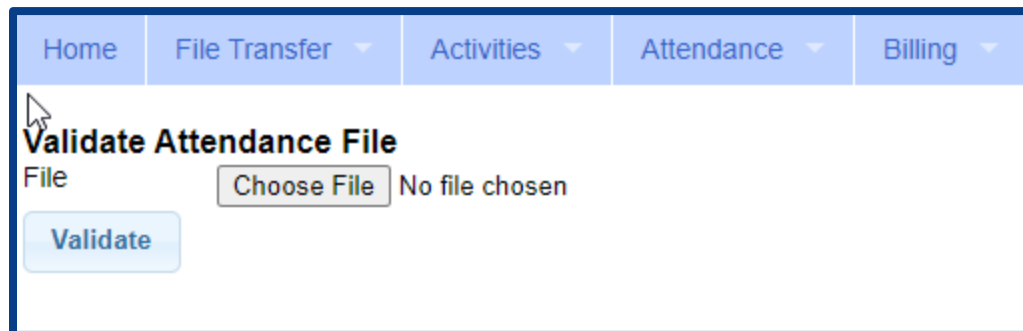
* The full list of County Codes can be found at:
  * *http://support.cpseportal.com/kb/a82/county-codes.aspx*

County Codes

CPSEPortal > Attendance Upload

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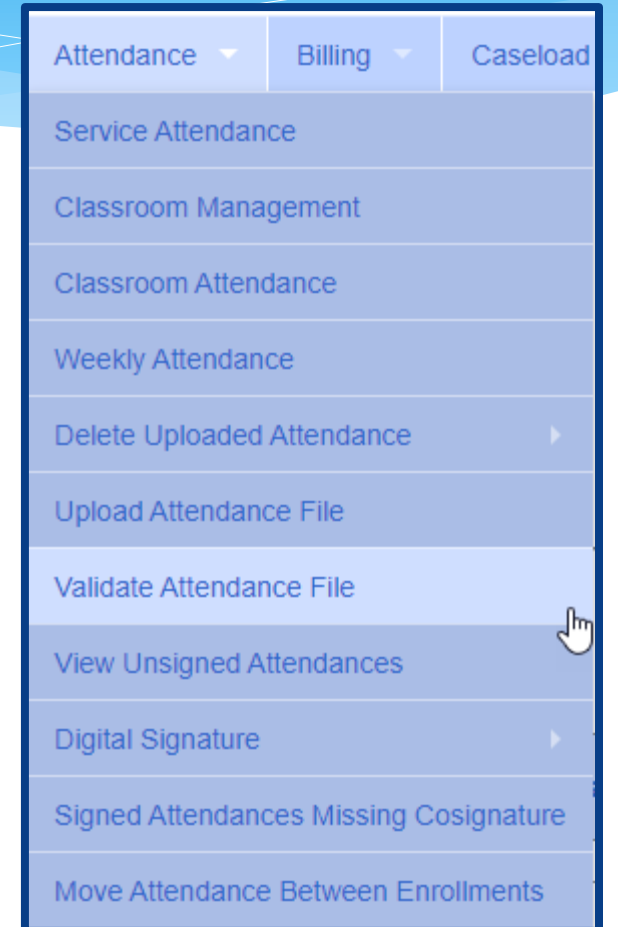
Code	County
01	ALBANY
02	ALLEGHANY
03	BROOME
04	CATTARAUGUS
05	CAYUGA
06	CHAUTAUQUA
07	CHEMUNG
08	CHENANGO
09	CLINTON
10	COLUMBIA
11	CORTLAND
12	DELAWARE
13	DUTCHESS
14	ERIE
15	ESSEX
16	FRANKLIN
17	FULTON
18	GENESEE
19	GREENE

Validate Attendance File

* Go to **Attendance > Validate Attendance File.**

* Click Choose File, and find your file.

* Now click *Validate.*

Attendance ▼	Billing ▼	Caseload
Service Attendance		
Classroom Management		
Classroom Attendance		
Weekly Attendance		
Delete Uploaded Attendance		▶
Upload Attendance File		
Validate Attendance File		
View Unsigned Attendances		
Digital Signature		▶
Signed Attendances Missing Cosignature		
Move Attendance Between Enrollments		

Home	File Transfer ▼	Activities ▼	Attendance ▼	Billing ▼

Validate Attendance File

File [Choose File] No file chosen

[Validate]

Common Validation Attendance Errors

Common Validation Attendance Errors

* Service Provider does not exist in database:

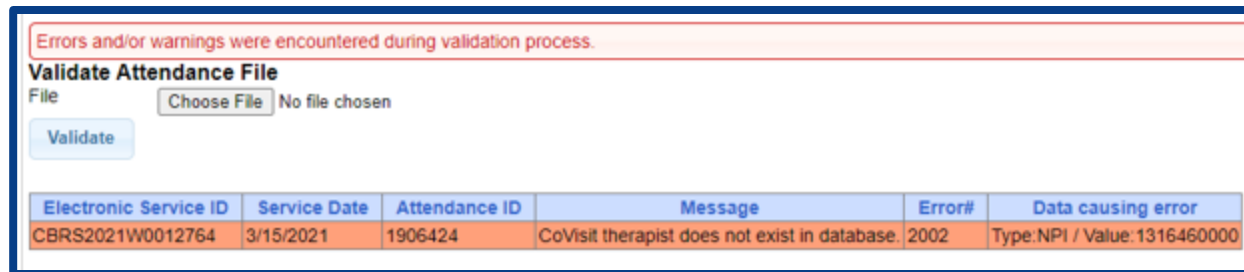 * *The therapist is not in the Portal. Add therapist to the Portal.*

* CoVisit therapist does not exist in database:

  * *The CoVisiting therapist is not in the Portal. Add CoVisiting therapist to the Portal.*

Common Validation Attendance Errors

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

Errors and/or warnings were encountered during validation process.

Validate Attendance File
File   Choose File   No file chosen
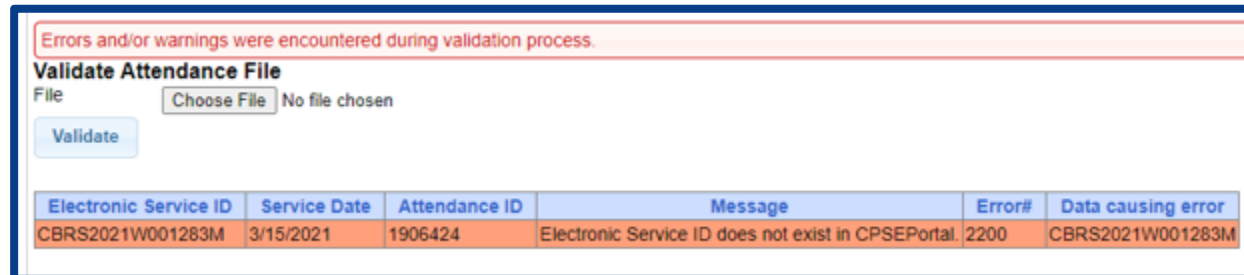
Validate

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

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

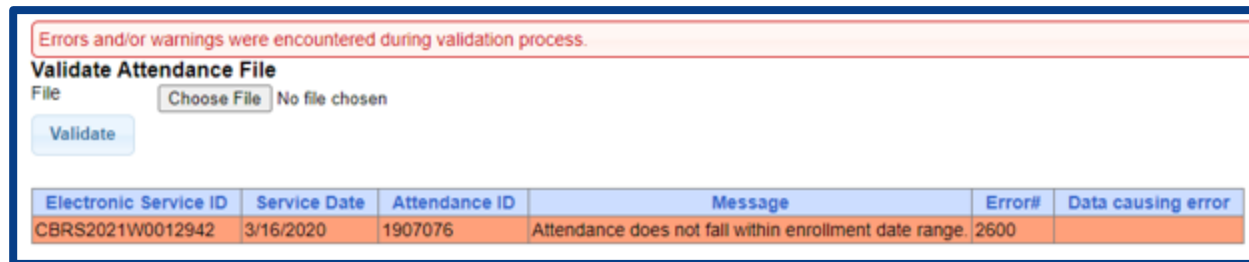Errors and/or warnings were encountered during validation process.

Validate Attendance File
File   Choose File   No file chosen

Validate

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

Common Validation Attendance Errors

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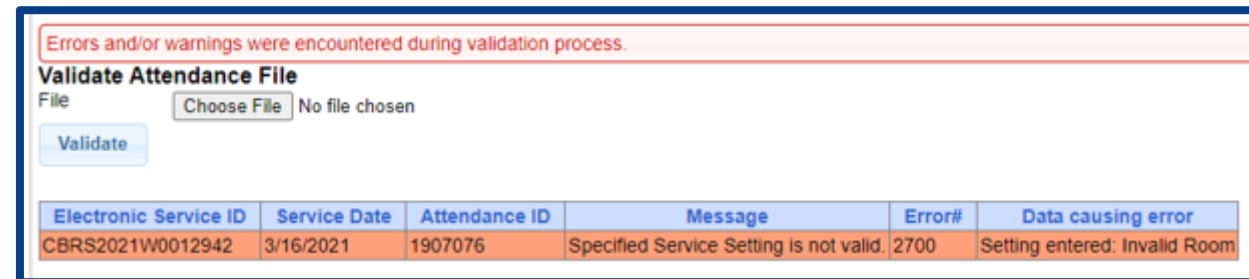 * *Attendance is outside of the enrollment dates. Check the attendance dates.*

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

Common Validation Attendance Errors

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

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

Common Validation Attendance Errors

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

* Invalid time entered. Time in must be before time out:
  * *Correct "time in" on attendance.*

Common Validation Attendance Errors

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

Errors and/or warnings were encountered during validation process.

Validate Attendance File

File [Choose File] No file chosen

[Validate]

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

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

Errors and/or warnings were encountered during validation process.
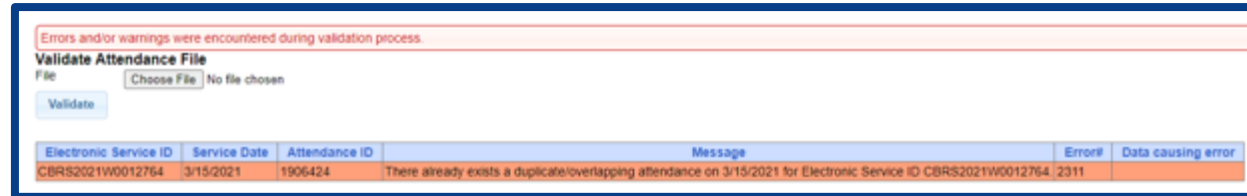
Validate Attendance File

File [Choose File] No file chosen

[Validate]

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

Common Validation Attendance Errors

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

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

Common Validation Group Attendance Errors

Common Validation Group Attendance Errors

* You have added a group session to an invalid enrollment:
  * *Check enrollment to ensure that the group session is on a group ESID # and not an individual ESID enrollment.*
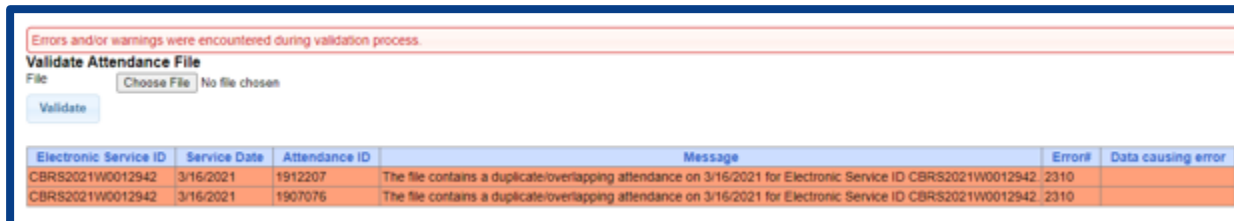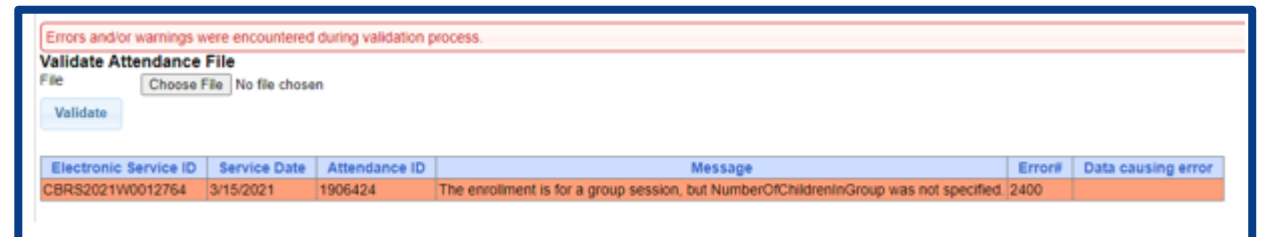
Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	You have added a group session to an invalid enrollment.	2400	
CBRS2021W0012764	3/16/2021	1907340	You have added a group session to an invalid enrollment.	2400	
CBRS2021W0012764	3/18/2021	1908962	You have added a group session to an invalid enrollment.	2400	

* The enrollment is for a group session, but Number Of Children In Group was not specified:
  * *Add # of children to group session.*
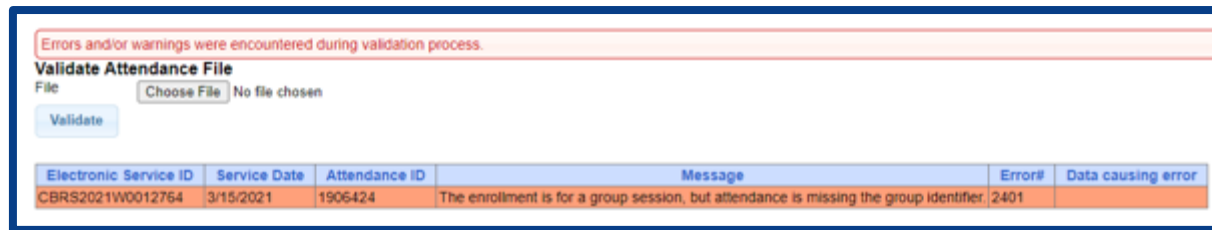
Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	The enrollment is for a group session, but NumberOfChildrenInGroup was not specified.	2400	

Common Validation Group Attendance Errors

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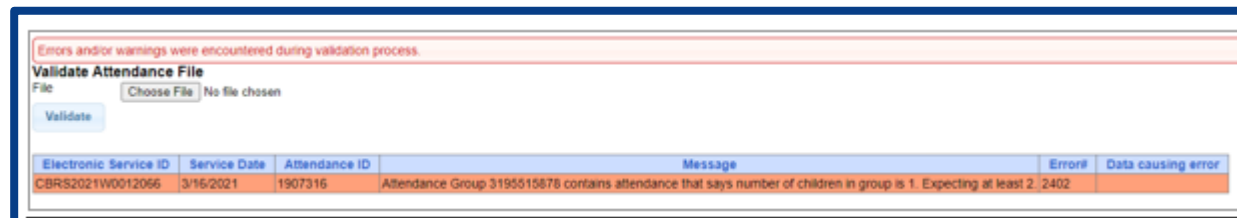
Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	The enrollment is for a group session, but attendance is missing the group identifier.	2401	

* Attendance Group # contains attendance that says number of children in group is 1. Expecting at least 2:
  * *Check group attendance, as there must be at least 2 children chosen with possibly one child marked as absent.*
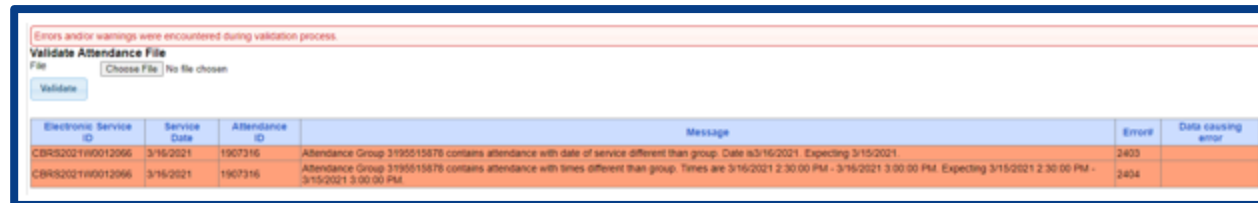
Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012066	3/16/2021	1907316	Attendance Group 3195515878 contains attendance that says number of children in group is 1. Expecting at least 2.	2402	

Common Validation Group Attendance Errors

* Attendance group contains attendance with date of service different than group or times different than group:

  * *Check all times and dates of service for children in group and make sure they are the same date & time.*

* Attendance Group contains attendance with enrollment type CBRS. Expecting RS.

  * *Check the enrollment types.*

Common Validation Group Attendance Errors

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

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

Common Validation Group Attendance Errors

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

Common Validation Signature Errors

Common Validation Signature Errors

* Digital signature signed therapist identifier does not match service provider for attendance.

    * *Check identifier for therapist who signed attendance for this service.*

* Digital co-signature signee does not exist in database.

    * *Check Portal and verify that the therapist cosigning session notes is in the Portal.*

Common Validation Signature Errors

* External signature OR co-signature signature OR QA signature signee does not exist in database:

  * *The therapist, supervisor or quality assurance supervisor who signed note is not in the Portal.*

Common Validation Code Errors

Common Validation Code Errors

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

Errors and/or warnings were encountered during validation process.					
Validate Attendance File					
File Choose File No file chosen					
Validate					
Electronic Service ID	**Service Date**	**Attendance ID**	**Message**	**Error#**	**Data causing error**
CBRS2021W0012931	3/16/2021	1906903	CPT Code 6784511 does not exist in CPSEPortal.	4000	6784511

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

Errors and/or warnings were encountered during validation process.					
Validate Attendance File					
File Choose File No file chosen					
Validate					
Electronic Service ID	**Service Date**	**Attendance ID**	**Message**	**Error#**	**Data causing error**
CBRS2021W0012931	3/16/2021	1906903	No ICD Code entered for this attendance.	4001	ICD entered:

Common Validation Code Errors

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

Upload Attendance File

Upload Attendance File

* To upload your Schema Attendance File, go to *Attendance > Upload Attendance File.*

* Click Choose File, look for your file, and click *Upload.*
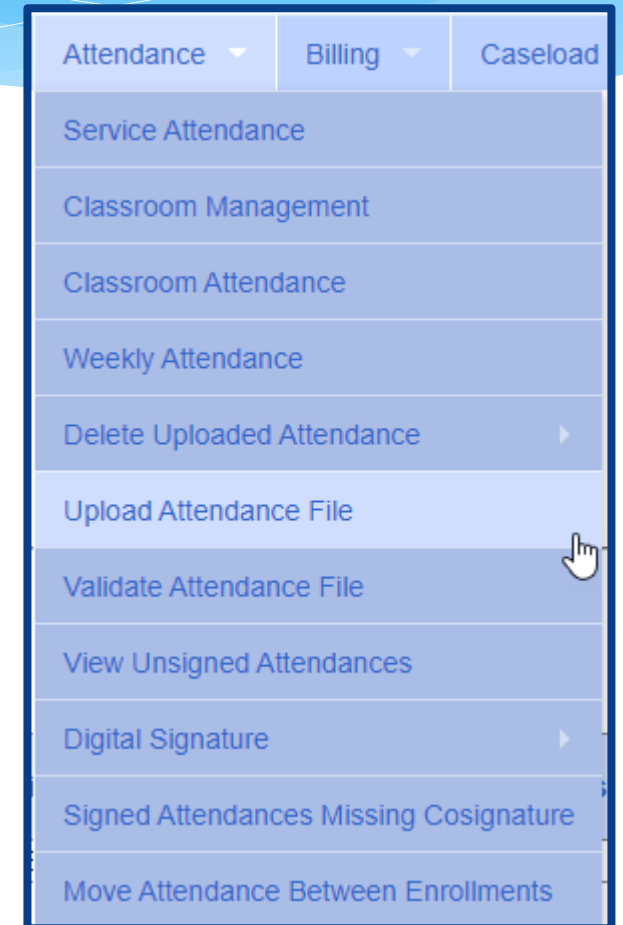
Creating Vouchers

Voucher Terminology

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

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

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

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

Creating a Voucher

* When ready to bill, you will need to create your voucher.

* Go to *Billing > Voucher Management*

* Click "Create Voucher"

Billing ▾	Caseload Mainten
Items Not Ready To Be Billed	
Voucher Management	
Submit Voucher(s)	
Print Voucher Summary	
Voucher Listing	
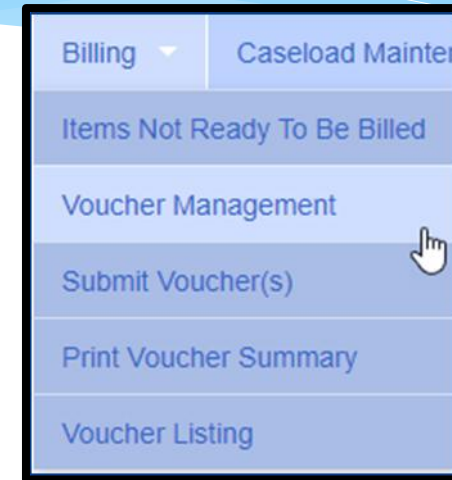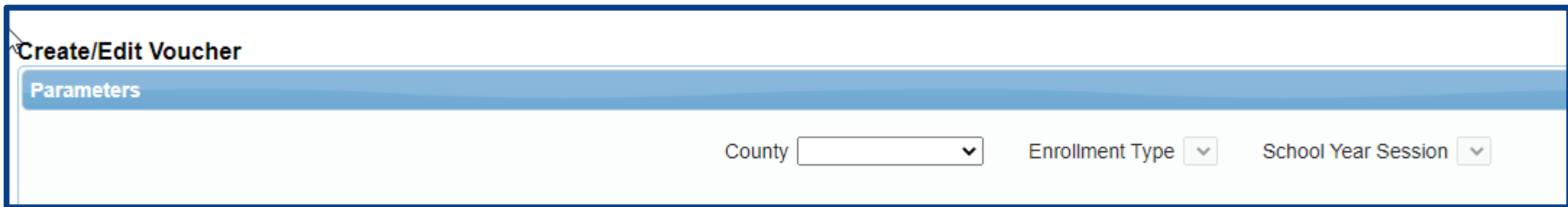
Recalc All   Create Voucher   ⬅

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

Create/Edit Voucher

Parameters			
County [▾]	Enrollment Type [▾]	School Year Session [▾]	

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 NASSAU ▾   Enrollment Type RS ▾   School Year Session 2019 - 2020 Summer ▾   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.

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 NASSAU ∨   Enrollment Type CBRS ∨   School Year Session 2022 - 2023 Summer ∨   Related Service Code ∨   SED Program Code ∨

Service Month From [   ]   Service Month To [   ]

Creating a Voucher

* Voucher numbers are auto-assigned.

* The Vendor invoice Number is how you as the agency might identify the Voucher.

* The County Document # is how the County might identify the Voucher (for example a pre-printed County specific numbered Voucher).
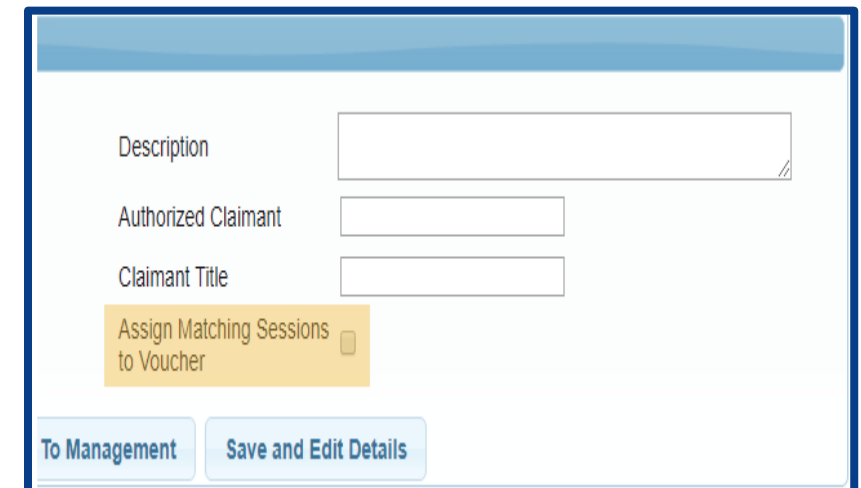
Creating a Voucher

* 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

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.

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.
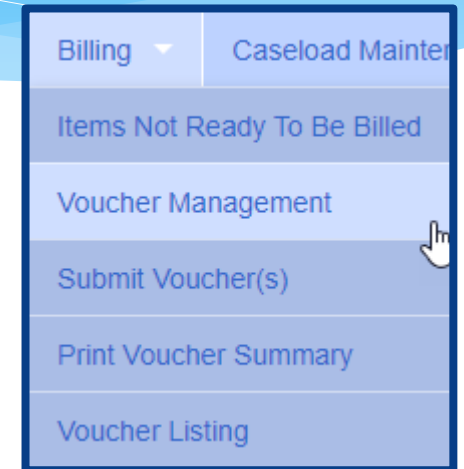
Billing ▼	Caseload Mainter
Items Not Ready To Be Billed	
Voucher Management	
Submit Voucher(s)	
Print Voucher Summary	
Voucher Listing	

Pending Vouchers

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

Creating a Voucher

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

* Click "*Assign*"

January 2023 ▾   Service Code: ▾   **Filter**

January 2023 ▾   Program Code: 9100 ▾

Unassigned

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

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

Assign -->

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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

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

<-- Unassign

Creating a Voucher

Voucher Details

Info

Voucher#: CBRS230203114901

Vendor Invoice#: [_____]

County Doc #: [_____]

Billing Date: 2/3/2023

Contract Number: [_____]

Description: Jan 23 CBRS

Authorized Claimant: Kristin [_____]

Claimant Title: Biller

[Update]

A=Adjustment   R=Regular

January 2023 ▼   Service Code: [___▼]   [Filter]

January 2023 ▼   Program Code: 9100 ▼

Unassigned   **Assigned**

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

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

[Assign -->]

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

[<-- Unassign]

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

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/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 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
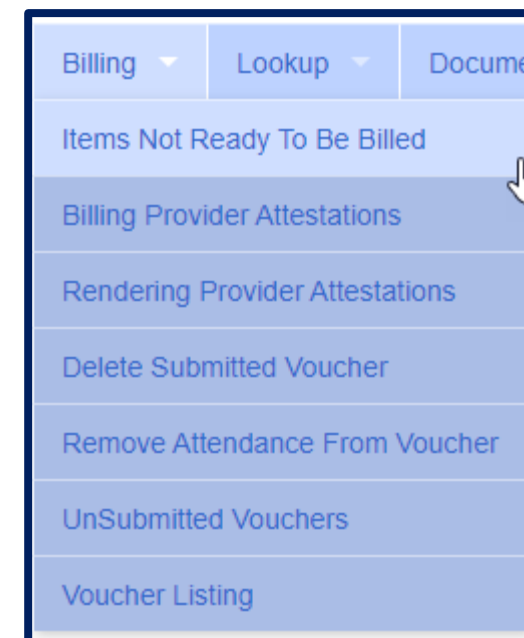
Items Not Ready to Bill

* 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: [2019 - 2020 Winter ▾]   Service Month From: [_____]   Service Month To: [_____]

Enrollment Type: [____ ▾]   Service Type: [__ ▾]   Program Code: [__ ▾]   [Retrieve]

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	Service Type	Frequency	Sessions	Amount	
CHERRY	YONG	HOFFMAN, KRISTEN	04/15/15	RS1920W0015042	11/20/19	06/26/20	Mar 2020	3/4, 3/11	Not signed	ST1 (Grp)	1x30	2.00	$103.00	Attendances
CHERRY	YONG	HOFFMAN, KRISTEN	04/15/15	RS1920W0015043	11/20/19	06/26/20	Mar 2020	3/2, 3/6, 3/9	Not signed	ST (Indv)	1x30	3.00	$154.50	Attendances

Move Attendance Between Enrollments

* If attendances have been entered on the wrong enrollment, then they can be moved from one enrollment to another without the service provider having to recreate the attendances.

* In order to move the attendances, they **cannot** be on a voucher.

* Go to *Attendance -> Move Attendances Between Enrollments.*

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Attendance ▾	Billing ▾	Caseload

Service Attendance

Classroom Management

Classroom Attendance

Weekly Attendance

Delete Uploaded Attendance ▸

Upload Attendance File

Validate Attendance File

View Unsigned Attendances

Digital Signature ▸

Signed Attendances Missing Cosignature

Move Attendance 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 [2021 - 2022 Winter ▾] Provider [_____▾]   Last Name [_____]   [Search]

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

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).

Billing ▼	Lookup ▼	Reports ▼
Voucher Management		
Submit Voucher(s)		
Print Voucher Summary		
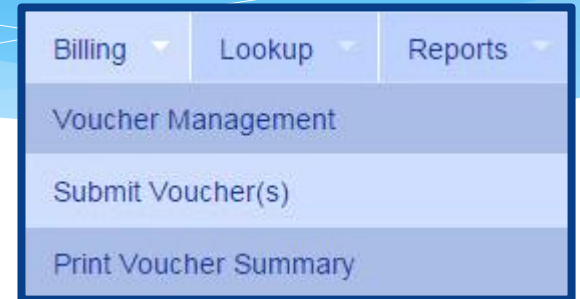
Submit voucher(s) for ULSTER county (unbilled CB vouchers).

ULSTER ⌄   CB ⌄

Select any Unbilled Vouchers
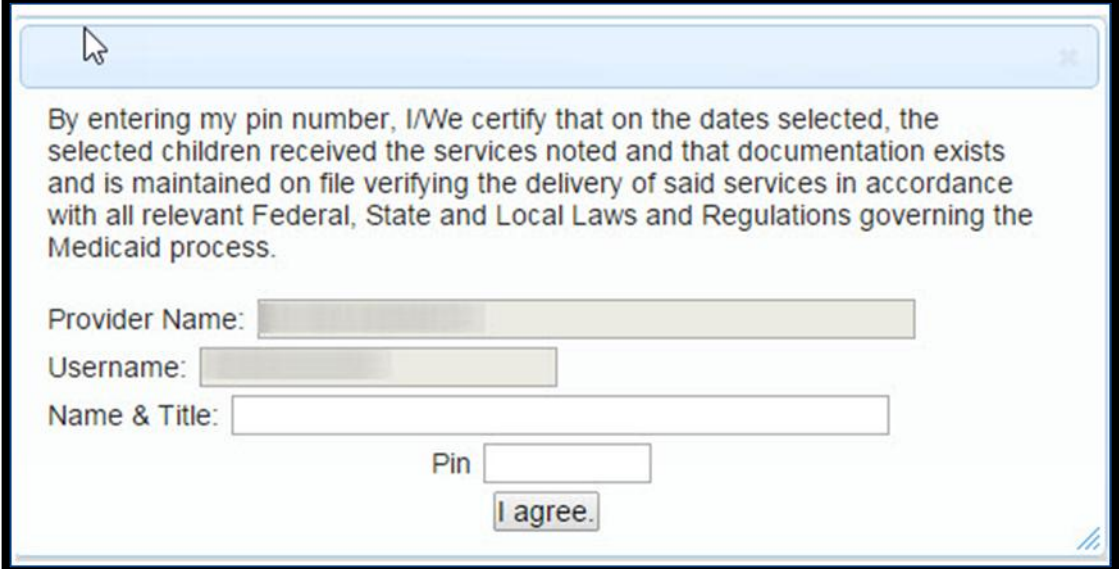
Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed	
☑	1/11/2022	CB220111104807							18	$52,452.00	
☐	1/18/2022	CB220118152217							9	$28,736.64	Problems on Voucher View Problems

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

Submit Voucher(s)

Submitting a Voucher

* After clicking "Submit Voucher(s)" - You will then get the screen on the right.

* Enter your personal PIN – Click "I Agree".

* You will get "Voucher Submitted Successfully" confirmation message at the top of the page.

* The voucher summary should pop up automatically upon submission. If for some reason it does not, continue with the following instruction on how to "Print Voucher Summary".

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

I agree.

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

Voucher Summary

* Sign the voucher summary, and send to County .

Voucher Summary

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

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.

Cannot Submit Voucher

Problems on Voucher

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

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 #	
09/08/23	Provided Treatment Session			11:00 AM	11:30 AM	30	1.00	30		Therapy Room	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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.

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
H		CBRS2324	9/7/2023	6/21/2024	PT (Indv)	2x30	Duplicate CPT Codes for Attendance	Attendances
H		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:
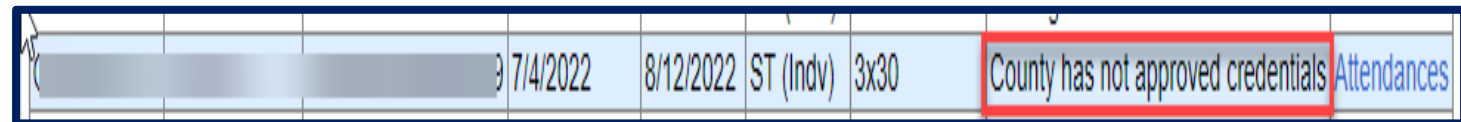
  * Click on the "Attendances" to see who the service provider is.
  * Go to **People -> Service Provider Credential Verification Listing** and verify credentials of therapist.
  * Once credentials are verified you will need to "Recalc" your voucher.
  * Your county will then approve credentials.

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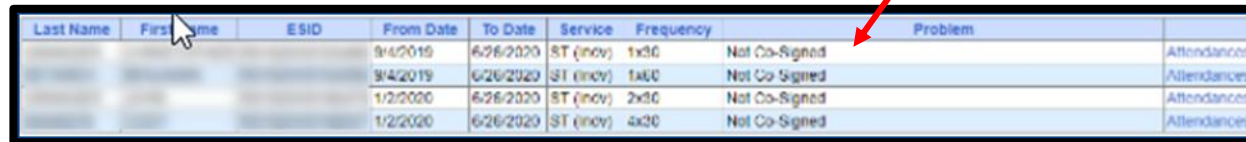
  * Click on the "Attendances" to see who the service provider is.
  * Contact your county to approve credentials for service provider.
  * If you are from Dutchess, Jefferson, Livingston, Rockland, Nassau, Sullivan or Westchester County, then contact McGuinness and we will approve the credentials.

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

Support@CPSEPortal.com

Cannot Submit Voucher: Problem of "Not Co-Signed"

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

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
			9/4/2019	6/26/2020	ST (indv)	1x30	Not Co-Signed	Attendances
			9/4/2019	6/26/2020	ST (indv)	1x60	Not Co-Signed	Attendances
			1/2/2020	6/26/2020	ST (indv)	2x30	Not Co-Signed	Attendances
			1/2/2020	6/26/2020	ST (indv)	4x30	Not Co-Signed	Attendances

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

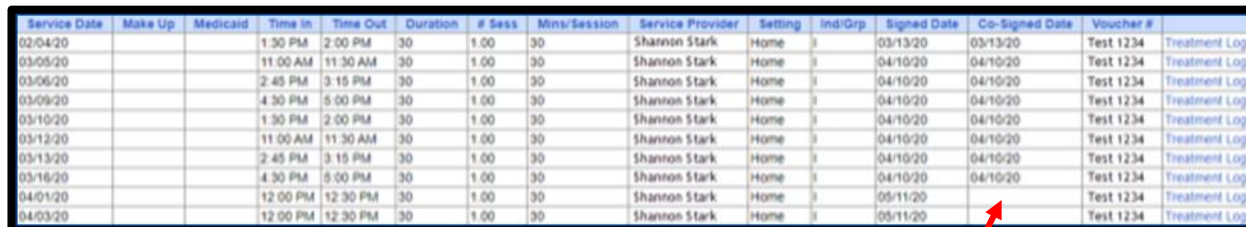| Service Date	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	
02/04/20			1:30 PM	2:00 PM	30	1.00	30	Shannon Stark	Home	I	03/13/20	03/13/20	Test 1234	Treatment Log
03/05/20			11:00 AM	11:30 AM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/06/20			2:45 PM	3:15 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/09/20			4:30 PM	5:00 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/10/20			1:30 PM	2:00 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/12/20			11:00 AM	11:30 AM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/13/20			2:45 PM	3:15 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/16/20			5:30 PM	6:00 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
04/01/20			12:00 PM	12:30 PM	30	1.00	30	Shannon Stark	Home	I	05/11/20		Test 1234	Treatment Log
04/03/20			12:00 PM	12:30 PM	30	1.00	30	Shannon Stark	Home	I	05/11/20		Test 1234	Treatment Log

Cannot Submit Voucher:
Problem of "Not Co-Signed"

* If a fully licensed provider signs the attendances and their credentials do not require them to have a   co-signature, the "Co-Signed Date" will auto-populate with the same information as "Signed Date."

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

Problem of "Not Co-Signed"
Step 1

* There are two ways for the credential dates to be updated:

* You, as the agency administrator can make the correction:
    * Go to *People -> Service Provider Credential Listing*.
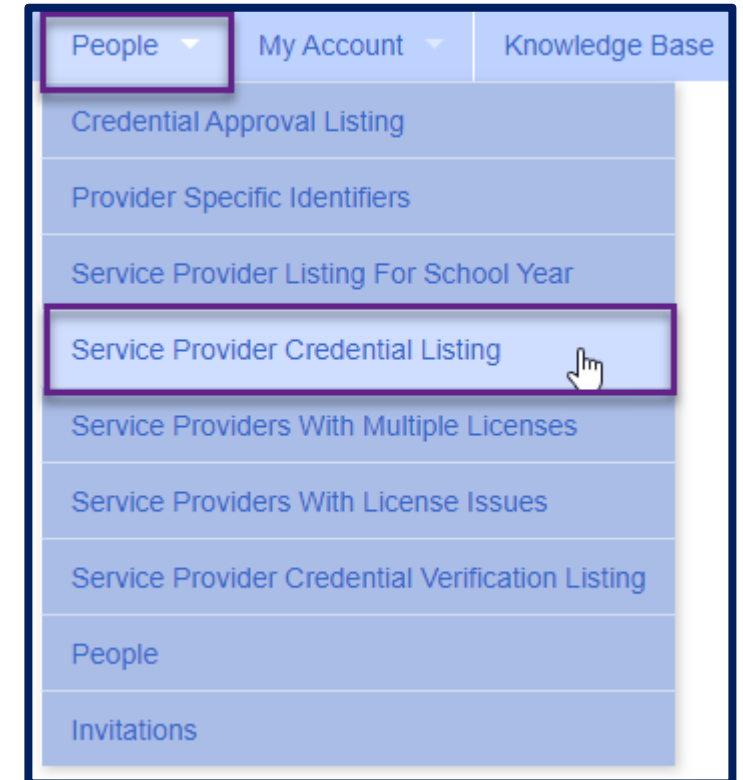
Cannot Submit Voucher: Problem of "Not Co-Signed"

* From here, you will click "*Retrieve*" and see a listing of all therapists within the given criteria.

* You will then scroll to the therapist in question and view the credential dates. If you see below, the "Registered Through Date" for this therapist's license is 04/30/20.

* If you have the option of "Edit," you will be able to correct this yourself.

* If you only see "View," then you will **not** be able to make the correction to their account as they are in the CPSE Portal working with multiple agencies. Contact the CPSE Portal Support Team at: **support@CPSEPortal.com**, and we will make the necessary changes for you.

Service Providers Listing with Credentials

Filters

County [All Counties ▾] Provider [GEBAUER,BETTY ▾] [Retrieve]

Active on: [7/15/2021]

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"
Step 2

* After the credential dates are updated, the Credential Verification will also need to be re-done. This can be done by the agency by following the instructions on the previous webinar slides or click on the link below.
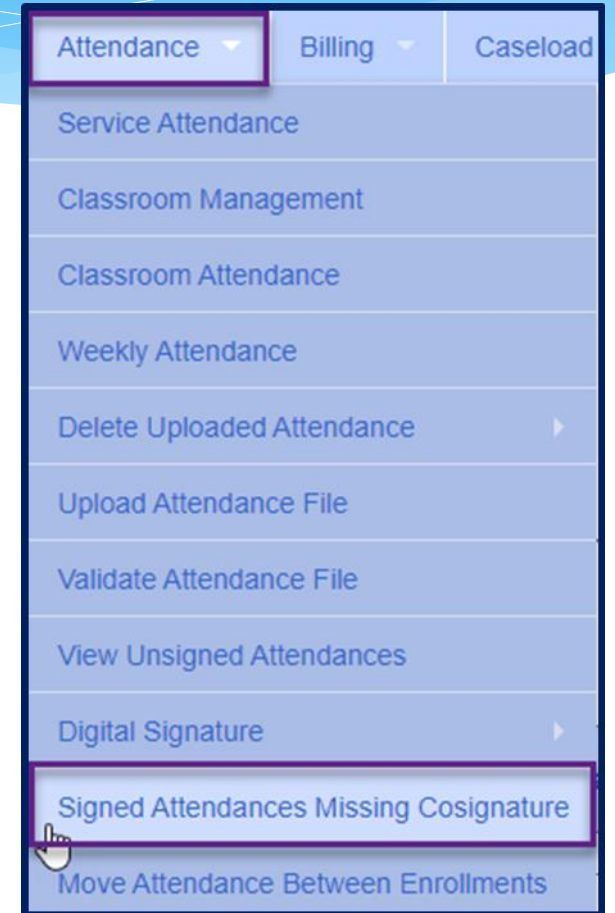

  * *http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx?KBSearchID=14295*

Problem of "Not Co-Signed" Step 3

* The attendances now **no longer** need to be removed from the voucher, but instead you can "re-check" the attendances.

* To do this go to *Attendance -> Signed Attendances Missing Cosignature*

Attendance ▼	Billing ▼	Caseload
Service Attendance		
Classroom Management		
Classroom Attendance		
Weekly Attendance		
Delete Uploaded Attendance	▶	
Upload Attendance File		
Validate Attendance File		
View Unsigned Attendances		
Digital Signature	▶	
Signed Attendances Missing Cosignature		
Move Attendance Between Enrollments		

Cannot Submit Voucher:
Problem of "Not Co-Signed"

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

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

Problem of "Not Co-Signed"

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

* You can also view the credentials from here as well.

Signed Attendances Missing Cosignature

Filters

School Year 2021 - 2022 ⌄   Retrieve

| 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*
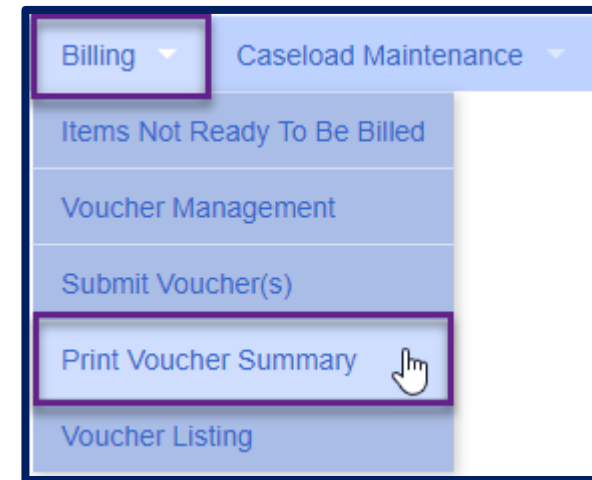
Print Voucher Summary

* 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 Sesssion: (All School Year Sessions) ▾ Enrollment Type: (All Enrollment Types) ▾ County: (All Billed Counties) ▾ Billing Month: (All Billing Months) ▾ Service Month: (All Service Months) ▾ Voucher Status: (Any Voucher Status) ▾

[Apply Filter]

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

Print Voucher Summary

* You will then see voucher summary:

Print Voucher Summary

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

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

Attendance Denied by County?

Attendance Denied?
How to Correct and Re-Bill

* You **MUST** confirm that the attendances have been denied by the county, and that you understand the removal is permanent.

* If a provider makes a mistake and submits the erroneous data on a voucher, the County may choose to deny payment for certain dates of service.

* If this occurs, and the provider would like to attempt to correct the data and resubmit on a new voucher, the process is as follows:

* The denied attendance needs to be removed from the initial voucher. To do this, you must inform the CPSE Portal support team of the ESID and service dates that you would like removed. To do this, complete the below form and email it to **support@cpseportal.com.**
  * **RequestToHaveAttendanceRemovedFromSubmittedVouchers.xlsx**

Attendance Denied?
How to Correct and Re-Bill

* Example of form:

IMG1: Example of form to be completed

Attendance Denied?
How to Correct and Re-Bill

* Once the attendance is no longer on a voucher:

  * If you need to modify the treatment log:
    * 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/unsigning-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 or was rescinded, here are the instructions:
    * *http://support.cpseportal.com/kb/a53/move-attendance-between-enrollments.aspx*

  * The attendance can be added to a new voucher and submitted. If the attendance is not appearing, make sure you do a **"recalc"** on the voucher.

Delete Uploaded Attendance
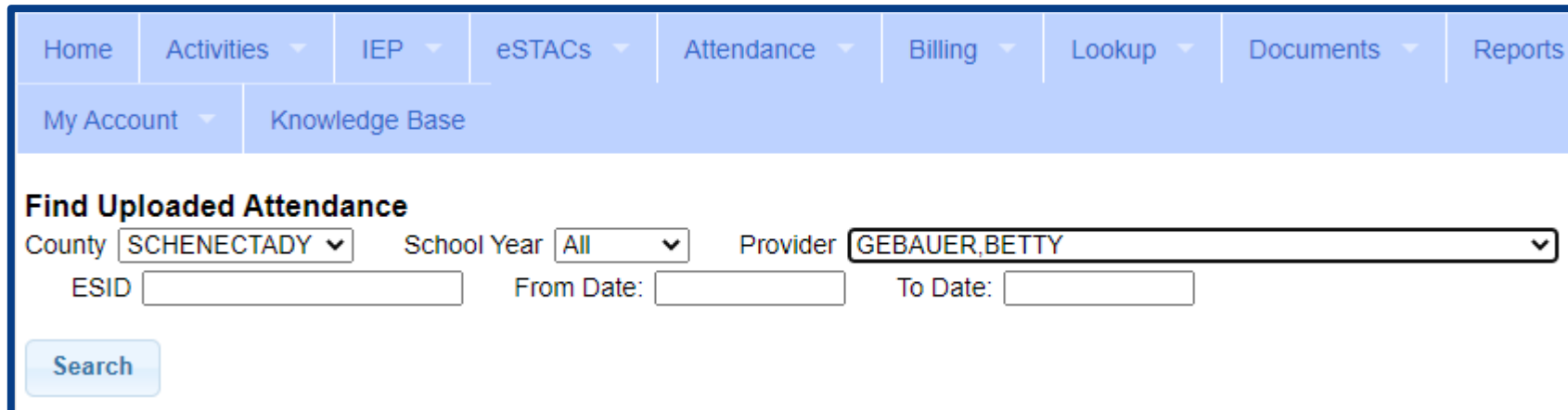
* You can delete either your attendance file or a single attendance.

* To delete your attendance file go to *Attendance > Delete Uploaded Attendance* and choose By File
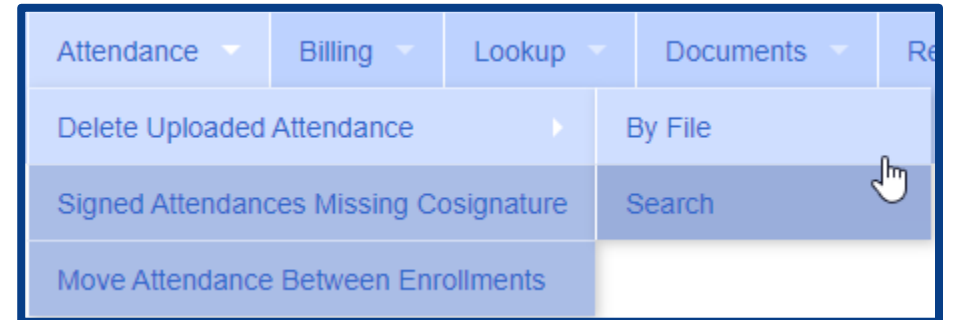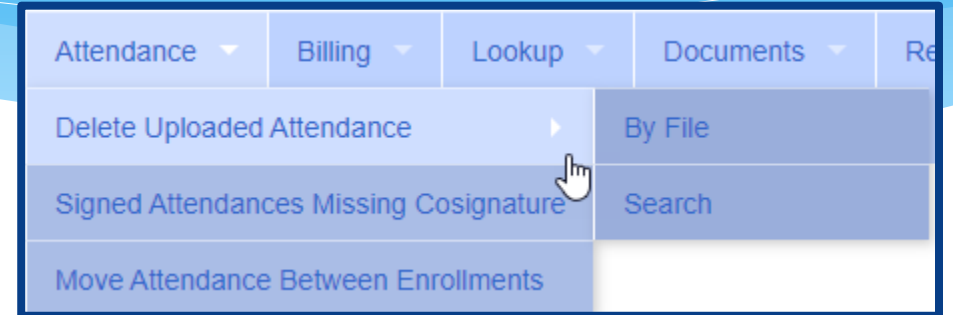
Delete Uploaded Attendance

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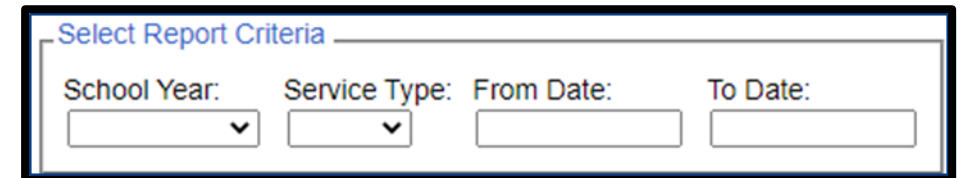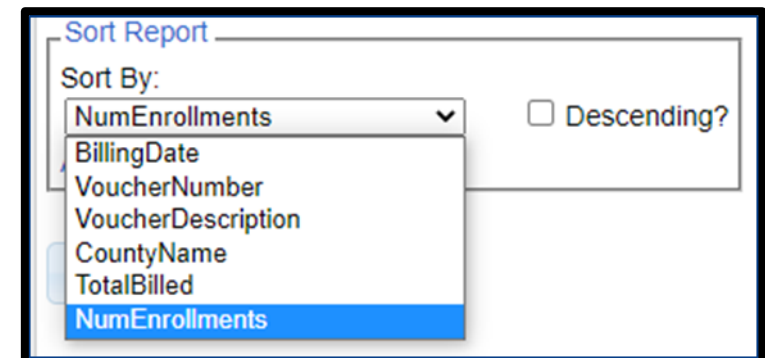
* You can search by ESID and date of attendance needed.

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.

Voucher Listing Report

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

Closing

Portal Training – Knowledge Base

* The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Portal support.

* You can simply click the Knowledge Base tab in the Portal or you can go to:

* *http://support.cpseportal.com/kb*
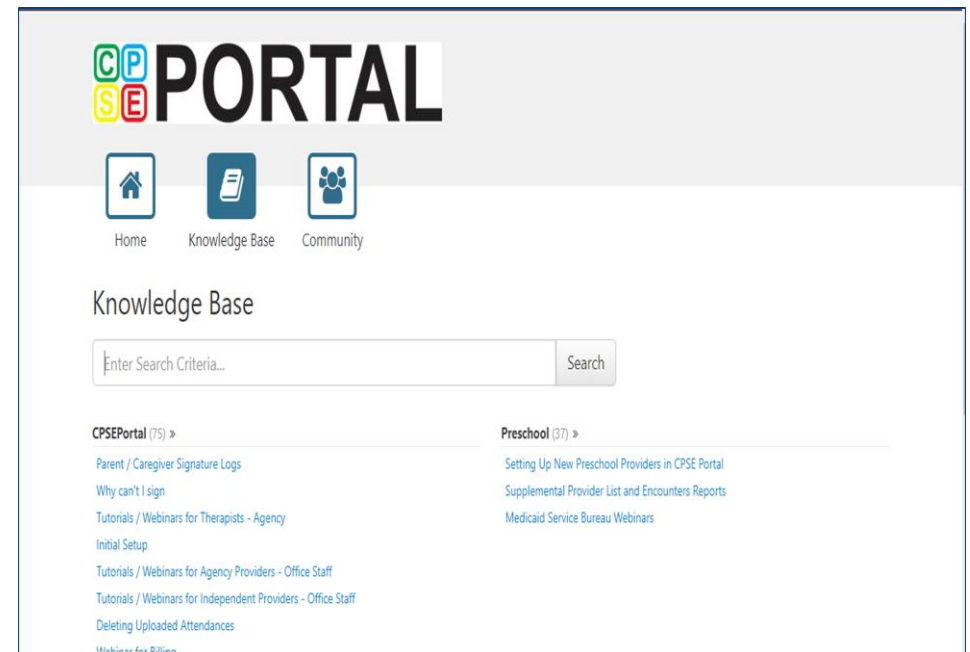
Helpful Knowledge Base Articles – Portal Invites & Credential Verification

* **Import Person with License Template**
  * http://support.cpseportal.com/kb/a126/import-person-with-license-template.aspx?KBSearchID=17027

* **Credential Verification for Agencies**
  * http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx

* **Credential Verification for Providers with NO CPSE Portal Login**
  * http://support.cpseportal.com/kb/a151/credential-verification-no-cpse-portal-login.aspx

* **County Codes**
  * http://support.cpseportal.com/kb/a82/county-codes.aspx

Helpful Knowledge Base Articles – Creating Vouchers

* **Schema for Attendance File Upload**
    * http://support.cpseportal.com/kb/a67/schema-for-attendance-file-upload.aspx?KBSearchID=16987
* **Creating and Submitting a Voucher**
    * http://support.cpseportal.com/kb/a62/creating-and-submitting-a-voucher.aspx?KBSearchID=17204
* **Why doesn't attendance appear to be put on a voucher?**
    * http://support.cpseportal.com/kb/a92/why-doesnt-attendance-appear-to-be-put-on-a-voucher.aspx?KBSearchID=17204
* **Missing a Full Diagnosis (ICD) Code**
    * http://support.cpseportal.com/kb/a339/missing-a-full-diagnosis-icd-code.aspx?KBSearchID=25519

Helpful Knowledge Base Articles – Creating Vouchers

* **Attendance Denied? How to Correct and Re-Bill**
  * http://support.cpseportal.com/kb/a81/attendance-denied-how-to-remove-in-order-to-correct-and-re-bill.aspx?KBSearchID=17075
* **Cannot Submit Voucher: Problem of "Not Co-Signed"**
  * http://support.cpseportal.com/kb/a230/cannot-submit-voucher-problem-of-not-co-signed.aspx?KBSearchID=17202
* **How to Submit a Ticket to the CPSE Portal**
  * http://support.cpseportal.com/kb/a188/how-to-submit-a-ticket-to-the-cpse-portal.aspx?KBSearchID=17204

Closing Remarks

* CPSE Portal Address (you may want to bookmark):
  https://www.cpseportal.com

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