

# UPLOADING PRESCRIPTIONS (2025 – Orange County)



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### **TOPICS COVERED**

#### **How to Upload a Prescription**

- Therapist Menu
- Billing Admin Menu (Two Options)
- PRESCRIPTION UPLOAD SCREEN (Four-Step Process)
  - 1) Upload Image
  - 2) Image Details Screen
    - Interactive Entry
      - Child Name
      - Time Period
      - Ordering Practitioner Name & Credentials
      - Signature Date

#### **Manual Selection**

- Practitioner's Address, Phone, Signature
- 3) Order Details Screen
  - Service, Frequency/Duration, ICD Code
- 4) Attach Enrollments to Details



Most contracts between counties and providers stipulates that the provider will comply with Medicaid regulations.

Since the written order is one of the key components that will allow the Medicaid claiming process to move forward, McGuinness has redesigned the upload process to coincide with the eight required items on a Medicaid prescription.

### WHAT ARE THE EIGHT REQUIRED ELEMENTS OF A MEDICAID PRESCRIPTION?

Per the **Medicaid Provider Policy and Billing Handbook** (Update 10) Page 21, www.oms.nysed.gov/Medicaid, there are eight (8) required elements on a written order. The prescription upload screen correlates with this list.

- 1. <u>Child's Name</u>
- 2. <u>Term of Service/Period of Service</u>
- **3.** Ordering Practitioner's Information
  - Name
  - Address/Phone
  - NPI #
- **4. Date** the order was written and signed
- 5. Signature of the ordering practitioner
- 6. <u>Service(s) being ordered</u> (OT/PT/ST).
- 7. <u>Frequency/Duration</u>/Class Designation Or As Per IEP Reference
- 8. Patient diagnosis (ICD Code)

Items 1-5 will be entered on the **Image Details** Screen.

Items 6-8 will be entered on the Order Details Screen.

### PORTAL MENUS (Service Providers & Billing Admins)

P E	PC	<b>PRT</b>	AL	Portal N	lenus for a S	Service Pr	ovider	
ne	Activities	Attendance	Caseload Maintenance	Lookup	Documents	Reports	My Account	Knowledge Base

Provider	Service Provider	Supervisor	QA Supervisor	Basic	Billing Admin	Full Service	
and the second sec							edit
							Add

	PO	RT	<b>AL</b>	•		Portal Menus for a Billing Admin							
Home	File Transfer	Activities	eSTACs 💎	Attendance	Billing	Caseload Maintenance	Lookup 👻	Documents -	Reports	Medicaid	People 🔻	My Account	Knowledge Base

Provider	Service Provider	Supervisor	QA Supervisor	Basic	Billing Admin	Full Service	
	<b>V</b>			1		<b>V</b>	edit
~							Add

### PRESCRIPTION MENUS (Caseload Maintenance & Medicaid Menus)

□ Prescriptions can be uploaded by Billing Admins or Therapists.

Therapists and Billing Admins will use different menus in the Portal to upload the prescription.

While the menus will be different for Therapists and Billing Admins, the upload process is exactly the same.

First I will go over the different menu options and then we will look at the upload process.

### PRESCRIPTION MENUS (Therapists & Billing Admins)

Before you can upload a paper prescription to the Portal the prescription must be scanned and saved to your computer (Desktop or folder).

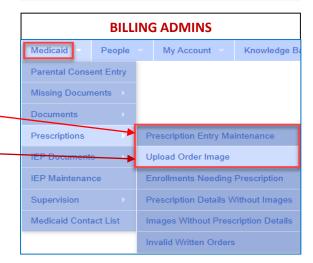
A prescription can be uploaded from **two different menus** in the Portal:

 <u>Caseload Maintenance</u> > Prescriptions for Caseload <sup>-</sup> (for Therapists)

#### 2. <u>Medicaid</u> >

- 1) Prescriptions > Prescription Entry Maintenance &
- 2) Prescriptions > <u>Upload Order Image</u>
  - (for **Billing Admins**)





### PRESCRIPTION MENU (Therapists)

### **For Therapists:**

**Caseload Maintenance** > Prescriptions for Caseload

Caseload Maintenance
My Caseload
Prescriptions for Caselo
Create New Order

Click the "Upload" link in the Upload Rx Column.

□ The <u>Upload Document</u> prompt comes up – To start the process you will upload the prescription image.

Prescription	s / Writtei	n Orders	for Casel	oad							
Filter By											
Provider:		~	Session. 20	122 - 2023 W	Vinter V			-+			
ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	View Images	Uploa	d Rx		
RS2223W0198283			9/7/2022	6/23/2023	ST 1x30 Individual	POTENTIAL	View existing images	Upload		Create Speech Recommendation	
RS2223W0198284			9/7/2022	6/23/2023	ST 1x60 Individual	POTENTIAL	View existing images	Upload	/	Create Speech Recommendation	
RS2223W0197941			9/7/2022	6/23/2023	ST 2x30 Individual	VERIFIED	View	View			

Upload Document	
Choose File No file chosen	Upload Image
*Accepts .pdf, .docx, .doc, .jpg, .jpeg, .png, .gif file form	ats

### PRESCRIPTION MENU (Billing Admins – Option 1)

### **For Billing Admins – Option 1**

**Medicaid**> Prescriptions > Prescription Entry Maintenance

- Enter Last Name, First Name and click SEARCH
- Click Select.



Click the "Upload Prescription Image" button. To start the process you will upload the prescription image.

Upload F	Prescription	County: NASSAU	District: LE	VITTOWN UFSD DOB: 1/	3/2016	Redo Search					Upload Document Upload Image Upload Image *Accepts .pdf, .docx, .doc, .jpg, .jpeg, .png, .gif file formats
	tion Entrie ption Ent		ages								
From	То	Order Type	Frequency	Signed By	NPI	Date Signed	ICD Codes	Status			
7/9/2021	6/30/2022	Speech Therapy	PER IEP	SHERI MORGASEN	1326326505	7/9/2021	F80.9	VERIFIED	View	Edit Entry	Or
7/1/2020	6/30/2021	Occupational Therapy	PER IEP	FAWZIA KAZMI	1609836501	11/6/2020	F81.9	VERIFIED	View	Edit Entry	
7/1/2020	6/30/2021	Speech Therapy	PER IEP	STEPHANIE NEUGEBAUER	1306255229	9/10/2020	F80.9	VERIFIED	View	Edit Entry	



### PRESCRIPTION MENU (Billing Admins – Option 2)

Upload Image

#### **For Billing Admins – Option 2**

**Medicaid**> Prescriptions > Upload Order Image

As soon as you click on Upload Order Image, the prescription template comes up.

To start the process you will upload the prescription image.

Click Choose File, Browse to Rx Image, Click Upload Image.

Upload Order I Reupload File	Ent	er child's ı	name>	Click Se	arch				
Name (Last, First) [Show Advanced Search options ]									
Child Number	Last Name	First Name	DOB	CIN	District	County			
C28000166857	1		1/3/2016	FU92125M	LEVITTOWN UFSD	NASSAU			

People

Parental Consent Entry Missing Documents

Prescriptions

**IEP Documents** 

IEP Maintenan

d Contact List

My Account

Upload Order Image

Prescription Entry Maintenance

Prescription Details Without Images

Images Without Prescription Details

Knowledge E

_U	pl	oa	d	D	0(	CU	Im	e	Π
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Choose File No file chosen

\*Accepts .pdf, .docx, .doc, .jpg, .jpeg, .png, .gif file formats



# Are there any questions about the different menu options?

### PRESCRIPTION UPLOAD SCREEN (Upload Order Image Screen – Scanned Prescription)

#### The screenshot below shows you what you will see on the uploading screen.

- On left is the screen that you will use to <u>enter</u> five of the eight required elements of a Medicaid prescription.
- On the **right** is the <u>scanned prescription</u> where you will obtain the information to enter to the **Image Details** Screen.

Upload Order Image PRESCRIPTION EN		
Reupload File	INT SORLEN	
Order Image Details		$\equiv$ OrderImageHandler 1 / 1   $-$ 80% +   🗄 🔊 $\pm$
Child		
JONES, JANE County: NASSAU District: LEVITTOWN UFSD	DOB: 1/3/2016 Redo Search	
Period of Service		SCANNED PRESCRIPTION
OApplies to entire school year		
OApplies to specific school year / session		
OApplies to specific date range		PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES
Required Field Checklist		In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a
Child Name	JANE JONES	recommendation for services as noted below will be provided as specified in the Individualized Education Program (IEP) designed by the Committee. (Check one or both as required.) Evaluation Services
Time Period of Service	JANE JONES	Student Name Jones, Jane DOB 1/3/2016
Ordering Practitioner's Name		Student Name Jones, Jane DOB 1/3/2016
Ordering Practicer NPI/ License		District Levittown UFSD County Nassau
Ordering Practitioner's Address		
Ordering Practitioner's Phone Number		Agency (Name of Agency, Center-based Program or Individual Provider / Phone)
Signature Date		(Deck Dra)
		Reason for Rx: 🛛 Annual Review Meeting 🔯 Change in Service 🗍 Transfer Meeting 🗍 Re-Eval Meeting 🗋 New Referral
		(REQUIRED)
		Term of Service: School Year July 1, 2022 to June 30, 2023 (Frequency, Duration & Class Ratio as per the IEP)

### HOW TO UPLOAD A SCANNED HARDCOPY PRESCRIPTION (Four-Step Process)

Upload Image

#### 1) Upload the Order Image

Upload Document

Choose File No file chosen \*Accepts .pdf, .docx, .doc, .jpg, .jpeg, .png, .gif file formats

#### 2) Enter the Image Details Screen - Required Field Checklist (Five of the eight required Medicaid items will be entered.)

Three of the eight	
required Medicaid	
items will be	
selected.	

	Child Name	SAF	
	Time Period of Service	7/1/2021 to 6/30/2022 (202122)	
	Ordering Practitioner's Name	CAROLYN LEMONS	
	Ordering Practioner NPI/ License	1912322454	
	Ordering Practitioner's Address		
Ì	Ordering Practitioner's Phone Number		
4	Signature Date	09/22/2022	
	Signature		
		Say	ve Order Image

#### 3) Select and/or Enter the Order Details Screen (Service Type, ICD Code, Frequency/Duration)

Ord	-Order Details								
	Service Type	ICD	Start Date	End Date	Frequency	Duration	I/G	Per IEP	
	<b>~</b>		7/1/2021	6/30/2022			~		Add Detail

#### 4) Attach the enrollment to the prescription.

	Provider Name	ESID	From Date	To Date	Service	Status	
BROOKVILLE	CENTER FOR CHILDRES SER	CBRS2223S0047009	07/04/2022	08/12/2022	ST 3x30 I	ON PREVIOUS ORDER	
BROOKVILLE	CENTER FOR CHILDRES SER	CBRS2223W0047014	09/06/2022	06/23/2023	ST 3x30 I		Atta

### STEP 1 – UPLOADING THE ORDER IMAGE (For Therapists & Billing Admins)

At this point in the process...

**Therapists** have clicked the "Upload" link (Prescriptions for Caseload) and are ready to upload the prescription image (Step 1).

Upload Rx

Create Speech Recommendation

1) Click <u>Choose File</u>

2) Browse to document on computer, and

3) Click <u>Upload Image</u>

#### Billing Admins have either...

Entered the child's name into the name box and clicked Search (from the Prescription Entry Maintenance Screen), OR...

View Images

View existing images Upload

- The <u>Upload Order</u> button was clicked from the Medicaid Menu and are ready to upload the prescription image (Step 1).
  - Click <u>Choose File</u>
     Browse to document on computer, and
     Click <u>Upload Image</u>
     Index <u>Upload Image</u>
     Upload Document
     Upload Document
     Upload Image

#### BOTH GROUPS WILL FOLLOW THE SAME STEPS/SCREENS TO ENTER/UPLOAD THE HARDCOPY PRESCRIPTION.

### Step 2 – IMAGE DETAILS SCREEN (Two Parts: Interactive Entry & Manual Selection)

#### Interactive Entry – (Order Image Screen – Step 2)

- 1. <u>Child's Name</u>
- 2. <u>Term of Service/Period of Service</u> Ordering Practitioner's Information:
- 3. <u>Name, Address</u>
- **4**⋅ <u>NPI #</u>
- 5. <u>Date</u> the order was written and signed

As you can see, the Medicaid elements shown in the Medicaid Handbook (this list) has been incorporated into the new screen.

#### Manual Selection – (Order Image Screen)

- 6. Ordering Practitioner's Address
- 7. Ordering Practitioner's Phone #
- 8. Order Practitioner's Signature

#### Preview of Image Details Screen

Count	y: NASSAU District:	LEVITTOWN UFSD	DOB: 1/3/2016	Redo Search
Period of Service				
Applies to entire school year	202	1 - 2022 🗸		
OApplies to specific school year	ar / session	$\sim$		
OApplies to specific date range	•			
Ordering Provider Details				
Cordering Practitioner Details -				
NPI:	1912322454			
Name: Address:	CAROLYN LEMONS 522 GLENWOOD AVE			
Address.	NEW BOSTON, OH 45	6625505		
Date Signed: 09/22/2022		Redo NPI Searc	h	
Required Field Checklist				
Child Name		SAKI		
Time Period of Service		7/1/20	21 to 6/30/2022 (2021	22)
Ordering Practitioner's Name	e	CARO	LYN LEMONS	
Ordering Practioner NPI/ Lic	ense	19123	22454	-
Ordering Practitioner's Addre	ess			
Drdering Practitioner's Phon				
Signature Date		09/22/	2022	
Signature				

\* Service, Frequency/Duration and Diagnosis Code will be entered on the next screen, Order Details Screen

### STEP 2 – IMAGE DETAILS SCREEN (Required Field Checklist – Interactive Entry)

Before we begin, please keep an eye on the "Required Field Checklist" box.

- As you progress through the <u>entering process</u>, beginning with the <u>child's name</u>, each required Medicaid element will be auto-checked in the selection boxes to the left of the Medicaid item in the <u>Required Field Checklist</u>.
- You will also you see a list of the *entered* information building (in red) to the right of the *Required Field Checklist*.

	Upload Order Image for
	Reupload File
Required Field Checklist	Order Image Details         Child       County: WESTCHESTER District: NEW ROCHELLE DOB: 9/8/2018 Redo Search         Period of Service       Operative School year / session         O Applies to specific date range       The Name begins the running list.         Required Field Checklist       Sky         Child Name       The Child's Name is already checked.         Ordering Practitioner's Name       Ordering Practitioner's Name         Ordering Practitioner's Address       Ordering Practitioner's Phone Number         Signature       Signature

Now you will begin the Interactive Entry from the scanned prescription beginning with the Period of Service.

IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Child's Name – Fills in Automatically to Start the Process)

#### □ The child's name auto-fills in three places on the template.

- 1) At the top of the screen
- 2) In the Child Box, and
- 3) In the Required Field Checklist box.

Since you already <u>Searched</u> and <u>Selected</u> the correct child (Billing Admins) or clicked the link in the Prescriptions for Caseload grid (Therapists), the child's name is...

- Auto-filled in the template.
- The *Child Check box* has been *auto-selected*.
- The <u>Child's Name</u> appears in the <u>Required Field List</u>.

Upload Order Image for 1
Reupload File
Order Image Details
2) County: WESTCHESTER District: NEW ROCHELLE DOB: 9/8/2018 Redo Search
Period of Service
OApplies to entire school year
OApplies to specific school year / session
OApplies to specific date range
Required Field Checklist
Child Name
Time Period of Service
Ordering Practitioner's Name
Ordering Practioner NPI/ License
Ordering Practitioner's Address
Ordering Practitioner's Phone Number
Signature Date
Signature

### STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Period of Service – Three Options)

- □ The first item that you will enter is the Period of Service (Term of Service) for the prescription.
- The Period of Service shows three options for the provider to select.
  - 1) Applies to entire school year
  - 2) Applies to specific school year/session
  - 3) Applies to specific date range

Period of Service	
OApplies to entire school year	~
OApplies to specific school year / session	~
OApplies to specific date range	

What you enter in this section is pre-determined by what is written on the hardcopy prescription.

STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Time Period of Service – Option #1 – Applies to Entire School Year)

#### Applies to <u>entire school year</u>, will be selected if the term of service dates are delineated on the prescription as <u>7/1 to 6/30</u>.

Period of Service	
Applies to entire school year	2022 - 2023 🗸
OApplies to specific school year / session	
OApplies to specific date range	

	PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES						
recommendatio	In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided <u>as specified in the Individualized Education Program</u> (IEP) designed by the Committee. (Check one or both as required.)						
Student Name	Jones, Jane DOB 1/2/17						
District	Schenectady City School District County Schenectady						
Agency	Achievements (Name of Agency, Center-based Program or Individual Provider / Phone)						
(Check One) Reason for Rx:	Annual Review Meeting 🛛 Change in Service 🗖 Transfer Meeting 🗖 Re-Eval Meeting 🗖 New Referral						
(REQUIRED) Term of Servi	ce: School Year July 1, 2022 to June 30, 2023 (Frequency, Duration & Class Ratio as per the IEP)						

(Disease terms in the last term disits of the asheal second Format VVVV)

### STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Time Period of Service – Option #2 – Applies to Specific School Year/Session)

# 2) Applies to specific school year/session, will be selected if the term of service dates are delineated on the prescription as 7/1 to 8/30 or 9/1 to 6/30.

Period of Service ————	
OApplies to entire school year	~
Applies to specific school year / session	2022 - 2023 Summer 🗸
OApplies to specific date range	

#### PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

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

Student Name	Jones, Jane	DOB	1/2/17
District	Schenectady City School District	County	Schenectady
Agency	Achievements	/	
	(Name of Agency, Center-based P	ogram or Individual Provid	der / Phone)
(Check One) Reason for Rx:	Annual Review Meeting 🛛 🛛 Change in Service	Transfer Meetin	ng 🔲 Re-Eval Meeting 🗌 New Referral
(REQUIRED) Term of Servic	e: School Year 7/1/22 to 8/30/22	(	Frequency, Duration & Class Ratio as per the IEP)

Period of Service		
OApplies to entire school year		$\sim$
Applies to specific school year / session	2022 - 2023 Winter	~
OApplies to specific date range		

#### PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

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

Student Name	Jones, Jane	DOB 1/2/17					
District	Schenectady City School District	County Schenectady					
Agency	Achievements (Name of Agency, Center-Pased P	Program or Individual Provider / Phone)					
(Check One) Reason for Rx:	Annual Review Meeting 🛛 Change in Service	e 🔲 Transfer Meeting 🔲 Re-Eval Meeting 🗌 New Referral					
(REQUIRED) Term of Servi	(REQUIRED) Term of Service: School Year 9/1/22 to 6/30/23 (Frequency, Duration & Class Ratio as per the IEP)						

### STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Time Period of Service – Option #3 – Applies to Specific Date Range)

Applies to specific date range, will be selected if there are "specific" term of service dates delineated on 3) the prescription such as  $\frac{7}{5}$  to  $\frac{8}{5}$  or  $\frac{9}{8}$  to  $\frac{6}{21}$ . These are specific dates that are more specific than session dates, which encompass the entire session. This option must be selected if the prescription has this type of specificity or if the child has their annual reviews using a calendar year.

Period of Service

Applies to entire school year

Applies to specific date range 09/08/2022

OApplies to specific school year / session 2022 - 2023 Winter

06/21/2023

Period of Service ———			
OApplies to entire school year			$\sim$
OApplies to specific school year	/ session	2022 - 2023 Winter	~
Applies to specific date range	7/5/22	8/5/22	
			_

PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES	PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES
In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided as specified in the Individualized Education Program (IEP) designed by the Committee. (Check one or bothas required.) <b>Evaluation Services</b>	In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided <u>as specified in the Individualized Education Program</u> (IEP) designed by the Committee. (Check one or both as required.)
Student Name Jones, Jane DOB 1/2/17	Student Name Jones, Jane DOB 1/2/17
District Schenectady City School District County Schenectady	District Schenectady City School District County Schenectady
Agency Achievements (Name of Agency, Center-based Program or Individual Provider / Phone)	Agency Achievements (Name of Agency, Center-based Program or Individual Provider / Phone)
(Check Ore) Reason for Rx: 🔲 Annual Review Meeting 🔯 Change & Service 🗖 Transfer Meeting 🗍 Re-Eval Meeting 🗍 New Referral	(Check One) Reason for Rx: 🛛 Annual Review Meeting 🖾 Change in Service 🗖 Transfer Meeting 🗖 Re-Eval Meeting 🗖 New Referral
(REQUIRED) Term of Service: School Year 7/5/22 to 8/5/22 (Frequency, Duration & Class Ratio as per the IEP)	(REQUIRED) Term of Service: School Year 9/8/22 to 6/21/23 (Frequency, Duration & Class Ratio as per the IEP)

### STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Time Period of Service)

After you select the appropriate term of service option (as indicated on the hardcopy prescription), you will need to enter the school year. When you select the school year, the next section of the entry screen populates, The Ordering Practitioner's Name, Address and NPI #. (See next slide.)

Upload Order Image for	Upload Order Image for
Reupload File	Reupload File
_ Order Image Details	Order Image Details      Child
_ChildSelect one.	County: WESTCHESTER District: NEW ROCHELLE DOB: 9/8/2018 Redo Search
County: WESTCHESTER District: NEW ROCHELLE DOB: 9/8/2018 Redo Search	Period of Service
Redo Search	● Applies to entire school year 2021 - 2022 ✓
Period of Service	OApplies to specific school year session
Applies to entire school year	
OApplies to specific school year / session	Search Criteria
OApplies to specific date range	NPI: Begins With: Ends With: State: Search
Required Field Checklist	Last Name:     Begins With:     Ends With:     Clear       First Name:     Begins With:     Ends With:     Clear
Child Name	Date Signed:
Time Period of Service	Date Signed: The child's name and term of service dates selected appear in the checklist. Required Field Checklist
Ordering Practitioner's Name	Thild Name Now two boxes are checked.
Ordering Practioner NPI/ License	Time Period of Service 7/1/2021 to 6/30/2022 (202122)

### STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Ordering Practitioner's Name, Address & NPI #)

- You will now see that the Ordering Provider Details box has filled in with the NPI search criteria. You can enter the NPI # for the ordering practitioner from the scanned prescription or if you cannot read the NPI # on the prescription you can enter the practitioner's name (and click Search).
- When you click Search, the name, address and NPI # for the ordering practitioner appears below the NPI search. Click Select in the list for the correct person (if more than one).

	Upload Order Image for
Upload Order Image for	Reupload File
Reupload File	
Order Image Details	Order Image Details
Child	_Child
County: WESTCHESTER District: NEW ROCHELLE DOB: 9/8/2018 Redo Search	County: WESTCHESTER District: NEW ROCHELLE DOB: 9/8/2018 Redo Search
Period of Service	Redo Search
Applies to entire school year     2021 - 2022      Applies to specific school year / session	Period of Service
OApplies to specific date range	● Applies to entire school year 2021 - 2022 ▼
Ordering Provider Details	OApplies to specific school year / session
- Search Criteria	OApplies to specific date range
NPI: Begins With: Ends With: State: Search	
Last Name: Begins With: Ends With: Clear	Cordering Provider Details
First Name: Begins With: Ends With: Clear	Search Criteria
Date Signed: Redo NPI Search	NPI:         Begins With:         1912322454         Ends With:         State:         Search
Required Field Checklist	Last Name: Begins With: Ends With:
Child Name	First Name: Begins With: Ends With: Clear
Time Period of Service 7/1/2021 to 6/30/2022 (202122)	
Ordering Practitioner's Name	
Ordering Practioner NPI/ License	NPI Last Name First Name Credentials Address1 City State Zip
Ordering Practitioner's Address	Select 1912322454 LEMONS CAROLYN 522 GLENWOOD AVE NEW BOSTON OH 456625505
Ordering Practitioner's Phone Number	
Signature Date	Date Signed: Redo NPI Search
Signature	

### STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Ordering Practitioner's Name, Address & NPI #)

- After you click Select, you will see that the Ordering Practitioner Details box has filled in with the Ordering Practitioner's information (Name, Address and NPI #).
- □ You will also see that four checkboxes are now checked and the NPI number for the ordering practitioner is now listed in the growing list of Medicaid elements to the right.

	Upload Order Image for
	Reupload File
Upload Order Image for	Order Image Details
Reupload File	Child
-Order Image Details	County: WESTCHESTER District: NEW ROCHELLE DOB: 9/8/2018 Redo Search
	Period of Service
County: WESTCHESTER District: NEW ROCHELLE DOB: 9/8/2018 Redo Search	Applies to entire school year     Applies to specific school year / session     Applies to specific date range     NPI # auto fills
Applies to entire school year     2021 - 2022      Applies to specific school year / session     Applies to specific date range     Ordering Provider Details	Ordering Provider Details Ordering Practitioner Details NPI: Name: Address: NEW BOSTON, OH 456625505 CAROLYN LEMONS S22 GLENWOOD AVE NEW BOSTON, OH 456625505
Search Criteria         NPI:       Begins With:       1912322454       Ends With:       State:       Search         Last Name:       Begins With:       Ends With:       Ends With:       Clear         First Name:       Begins With:       Ends With:       Clear         NPI       Last Name       First Name       Credentials       Address1       City       State       Zip         Select       1912322454       LEMONS       CAROLYN       522       GLENWOOD AVE       NEW BOSTON OH       456625505         Date Signed:       Redo NPI Search	Date Signed:       Redo NPI Search         Required Field Checklist       Four checkboxes are now         Child Name       checked.         Time Period of Service       7/1/2021 to 6/30/2022 (202122)         Drdering Practitioner's Name       CAROLYN LEMONS         Drdering Practitioner's Address       1912322454         Ordering Practitioner's Phone Number       Signature Date         Signature       Signature

### STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Signature Date)

Next you will enter the signature date from the scanned prescription.

If the signature date is not on the prescription, you will need to secure a replacement prescription.

After you enter the signature date, the Signature Date field is auto-checked in the Required Field Checklist and the signature date appears in the growing list of fields on the right.

Jpload Order Image for	
Reupload File	
Order Image Details	
Child	
County: WESTCHESTER	District: NEW ROCHELLE DOB: 9/8/2018 Redo Search
Period of Service	
Applies to entire school year     2021 -	- 2022 🗸
OApplies to specific school year / session	~
OApplies to specific date range	
Ordering Provider Details	
Cordering Practitioner Details	
NPI: 1912322454	
Name: CAROLYN LEMONS Address: 522 GLENWOOD AVE	
NEW BOSTON, OH 4566	325505
Data Signadi (014/22	
Date Signed: 9/1/22	Redo NPI Search
Required Field Checklist	
Child Name Five check boxes are	
Time Period of Service now checked.	7/1/2021 to 6/30/2022 (202122)
Ordering Practitioner's Name	CAROLYN LEMONS
Ordering Practioner NPI/ License	1912322454
Ordering Practitioner's Address	
Ordering Practitioner's Phone Number	Signature date fills in here.
Signature Date	9/1/22
Signature	

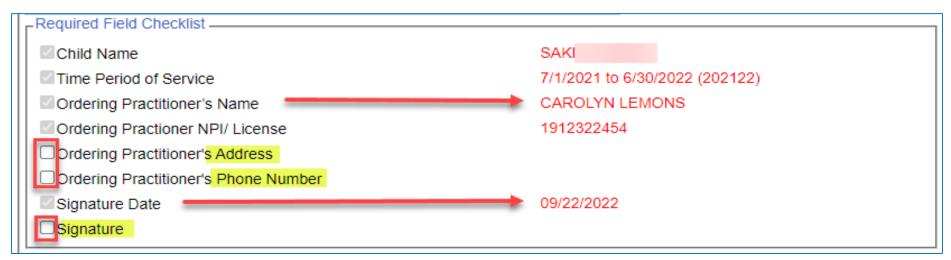
### STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Manual Selection)

- Five check boxes have auto-filled throughout the entering process so far.
- Three checkboxes remain unchecked.

These fields will require the person uploading the prescription to view the scanned prescription for the Ordering Practitioner's address, phone number and signature.

If the Ordering Practitioner's contact information and signature is listed on the prescription, you will check these (3) boxes.

If these items are not listed on the prescription, you will not be able to proceed any further and you should secure a replacement prescription.



STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Saving the Required Field Checklist – Image Details – Save Order Image)

After you check the three remaining boxes, the Save Order Image Button populates to the screen. you will click the Save Order Image button.

Reupload File			
Order Image Details			
Child			
CHRISTIAN, SKYLAR County: WESTCHESTER	District: NEW ROO	CHELLE DOB: 9/8/2018	Redo Search
Period of Service			
Applies to entire school year     2021	- 2022 🗸		
OApplies to specific school year / session	~		
OApplies to specific date range			
Ordering Provider Details			
Cordering Practitioner Details			
NPI: 1912322454			
Address: CAROLYN LEMONS			
NEW BOSTON, OH 456	625505		
Date Signed: 9/1/22	Redo NPI Search		
Required Field Checklist			
Child Name	SKYLAF	R CHRISTIAN	
Time Period of Service	7/1/2021	1 to 6/30/2022 (202122)	
Ordering Practitioner's Name	CAROL	YN LEMONS	
Ordering Practioner NPI/ License	1912322	2454	
✓Ordering Practitioner's Address	ck boxes if informa	ation is on Rx	
✓Ordering Practitioner's Phone Number			
Signature Date	9/1/22		
Signature			
t			
			Save Order Image

### STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Saving The Required Field Checklist)

You will notice in screenshot #1 that the last check box (Signature) remains unchecked. You will also notice there is no SAVE button at the bottom of the screen.

Required Field Checklist	
Child Name	SAK
Time Period of Service	7/1/2021 to 6/30/2022 (202122)
Ordering Practitioner's Name	CAROLYN LEMONS
Ordering Practioner NPI/ License	1912322454
Ordering Practitioner's Address	No Save Button
Ordering Practitioner's Phone Number	
Signature Date	09/22/2022
Signature Last item unchecked	V

Screenshot #2 shows all the boxes checked, which will now allow you to SAVE.

 All eight items must be checked and/or entered or you will not have the option to SAVE.

Child Name	SAF	
Time Period of Service	7/1/2021 to 6/30/2022 (20212	2)
Ordering Practitioner's Name	CAROLYN LEMONS	
Ordering Practioner NPI/ License	1912322454	
Ordering Practitioner's Address		
Ordering Practitioner's Phone Number		
Signature Date	09/22/2022	
✓Signature		4

STEP 2 – IMAGE DETAIL SCREEN – REQUIRED FIELD CHECKLIST (Saving the Required Field Checklist – Image Details – Save Order Image)

After you click the Save Order Image button, you will receive a message indicating that the Order File saved successfully. (Yellow bar/top of screen).

Order File saved successfully. Please enter details.	<b></b>		
Required Field Checklist Child Name Time Period of Service Ordering Practitioner's Name Ordering Practitioner's Name Ordering Practitioner's Address Ordering Practitioner's Phone Number Signature Date Signature	SKY 7/1/2021 to 6/30/2022 (202122) CAROLYN LEMONS 1912322454 Check boxes if information is on Rx. 9/1/22	Save Order Image	

# QUESTIONS About the Order Image Screen

### STEP 3 – ENTERING THE ORDER DETAILS

The following items (Order Details) needs to be completed.

- 1) The **Service Type** (OT/PT/ST/PSY)
- 2) The ICD Code
- 3) The Frequency, Duration, Class Designation (I/G) (Only choose one option below Not Both.)
  - a) If the prescription has narrative that states that the <u>frequency and duration will be delivered</u> "<u>As per the IEP</u>," you will check the <u>Per IEP</u> box on the Order Detail Screen.

Г	Order Details								1		
		Service Type	ICD	Start Date	End Date	Frequency	Duration	I/G	Per IEP		-
		Occupational Therapy 🗸	R62.50	7/1/2022	6/30/2023			~	<b>Z</b>	Add De	etail

b) If the prescription has the **specific frequency/duration and class designation (I/G)** delineated on the prescription, you will enter that information into the respective boxes on the Order Detail Screen.

	-Ord	ler Details									_
* The Start and End Dates auto-fill with the period of		Service Type Occupational Therapy	-	ICD R62.50	Start Date 7/1/2022	End Date	Frequency 2	Duration 30	iic Gv	Per IEP	Add Detail
service dates that were entered on the Image Detail Screen.				·		<u> </u>					

Click the Add Detail link. (The link changes from Add Detail to Edit/Delete.)

### SHOW FILE DETAILS BUTTON

Once you get to the <u>Order Details</u> screen, you can check the <u>Image Details</u> by clicking the <u>Show File Details</u> button.

To return to the <u>Order Details</u> screen from the <u>Order Image Details</u> Screen, click the <u>Hide File Details</u> button.

Upload Order Image	Upload Order Image
Order File saved successfully. Please enter details.	Hide File Details Click Hide File Details to return to the Order Details Screen.
Show File Details	Order Image Details
	Child
_Order Details	County: NASSAU District: LEVITTOWN UFSD DOB: 1/3/2016 Redo Search
Service Type ICD Start Date End Date Frequency Duration I/G Per IEP	Period of Service
Image: Service type         Image: Service type	Applies to entire school year           2021 - 2022 ~
	OApplies to specific school year / session
	OApplies to specific date range
	Cordering Provider Details
	Cordering Practitioner Details
	NPI:         1912322454           Name:         CAROLYN LEMONS
	Address: 522 GLENWOOD AVE
	NEW BOSTON, OH 456625505
	Date Signed: 09/22/2022 Redo NPI Search
	Required Field Checklist
	Child Name SA
	Time Period of Service 7/1/2021 to 6/30/2022 (202122)
	CAROLYN LEMONS
	Cordering Practioner NPI/ License 1912322454
	Crdering Practitioner's Address
	Crdering Practitioner's Phone Number
	Signature Date 09/22/2022
	Signature
	Save Order Image

### STEP 4 – ATTACHING THE ENROLLMENT – FINAL STEP

- After you enter the (Service Type, ICD Code Frequency/Duration) and click the Add Detail link, you will see the following screen.
- □ The next step is attaching the enrollment(s) to the prescription Step 4 of the process.
- Click Select for each therapy shown on the screen.

(which will bring up all the enrollments for the selected service type within the selected period of service).

Click the **"Attach"** link to <u>link</u> the enrollment(s) to the prescription.

Upload Order Image Show File Details								iow	File Details										
Order Details	art Date End Date	Frequency	Duration	I/G	Per IEP				Service Type	-	ICD	Start Date	End Dat		quency	Duration	I/G	Per IEP	Edit
Select Speech Therapy F80.9 7.	/1/2021 6/30/2022			~		Edit Delete Add Detail	Se		Speech Therapy	f80.9	9	7/1/2022	6/30/202 ] [6/30/2023	3			~		Edit Delete Add Detail
						Detail	BR	DOK	The Enrollments Provider Name KVILLE CENTER FOR CHILD KVILLE CENTER FOR CHILD and Go To Child Details			2223S0047009 0			ST 3x30 I ST 3x30 I	ON PREV	tatus IOUS OI		tach

### STEP 4 – ATTACHING/DETACHING THE ENROLLMENT

After you click the Attach link, <u>the link</u> changes to show "Detach." The prescription is now uploaded and is attached to the child's enrollment(s). You can click the link again to change the status back to "Attach" to remove the enrollment from the prescription.

ċ	d Order Image v File Details Reupload Fi	le								
Order I	Details									
	Service Type	ICD	Start Date	End D	ate Fi	equency	Duration	I/G	Per IEP	
Select	Select Speech Therapy f80.9		7/1/2022	6/30/20	6/30/2023				<b>V</b>	Edit Delete
	<b>~</b>		7/1/2022	6/30/2023				~		Add Detail
Apply 1	To Enrollments									
	Provider Name		ESID	From Date	To Date	Service	S	tatus		
BROO	KVILLE CENTER FOR CHILD	RES SER CBRS	2223S0047009	07/04/2022	08/12/202	2 ST 3x30	I ON PREV	IOUS O	RDER	
BROO	KVILLE CENTER FOR CHILD	RES SER CBRS	2223W0047014	09/06/2022	06/23/202	3 ST 3x30	I ATTACHE	D	[	Detach
Finish	and Go To Child Details									

### FINISH AND GO TO CHILD DETAILS

□ If you click the "Finish and Go To Child Details" button, you can check the Portal details for the uploaded prescription from the Written Orders Tab.

Provider Name	ESID	From Date	To Date	Service	Status
BROOKVILLE CENTER FOR CHILDRES SER	CBRS2223S0047009	07/04/2022	08/12/2022	ST 3x30 I	ON PREVIOUS ORDI
BROOKVILLE CENTER FOR CHILDRES SER	CBRS2223W0047014	09/06/2022	06/23/2023	ST 3x30 I	

### REVIEWING THE PRESCRIPTION DETAILS (Written Orders Tab)

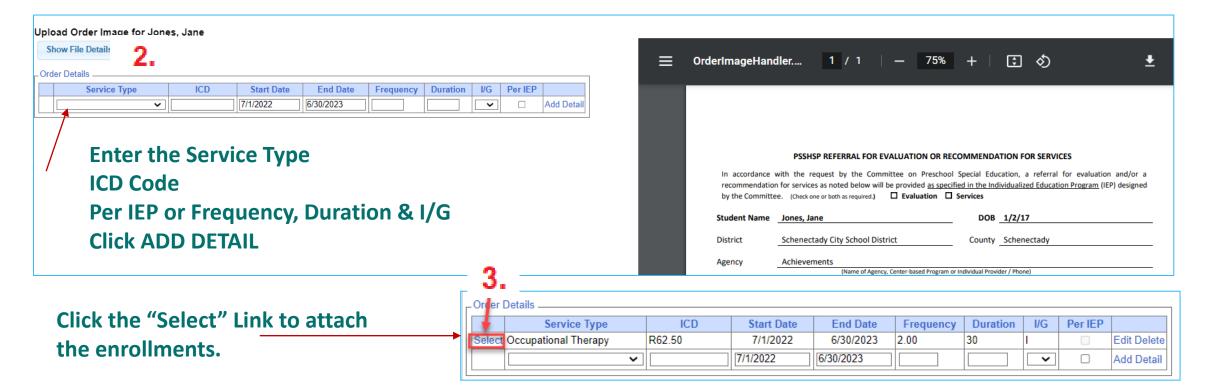
After you click the "Finish and go to Child Details" button, this screen comes up.

- Click on the Written Orders Tab to view Prescriptions.
- You can see that a prescription was entered and includes the following information:
  - The school year for the prescription
  - Who signed the prescription
  - Signature date of the prescription
  - The date the prescription was uploaded

Enrollments	Written Order	s IEPs	Consent	s	Documents	CINS			
Upload Presc	ription Image								
Prescription Image	ages								
Description	SchoolYear	Signed E	By Da Sigr		Date Uploaded	Invalid Reason	Invalidated	Invalidated By	
	202223	CAROLYN LEMONS	9/1/2	022	9/20/2022 📹				manag
	202223	NORA GERSTEIN	7/5/2	022	7/5/2022				manag
OT Prescription	202122	MAURICE CHIANESE	8/24/2	2021	9/10/2021				manag
	202122	KATRINA MACKEN	9/2/2	021	9/2/2021				manag
Prescription En	tries								
From To	) Ser	vice	Frequency		Signed By	Date Signed			
7/1/2022 6/30/2	2023 Speech Th	erapy	PER IEP		DLYN LEMONS	9/1/2022	manage		
	2023 Speech Th		PER IEP		A GERSTEIN	7/5/2022	manage		
7/1/2021 6/30/2	2022 Occupation	nal Therapy	PER IEP	MAU	RICE CHIANESE	8/24/2021	manage		
9/2/2021 6/30/2	DOOD One och Th		PER IEP	KATD	NA MACKEN	9/2/2021	manage		

### FINISHING AN INCOMPLETE PRESCRIPTION (Written Orders Tab)

Upload Presc	ription Image	C	lick th	e "Mana	age" Lin	k.		-	1
Prescription Im	ages ———							_	ł
Description	SchoolYear	Signed By	Date Signed	Date Uploaded	Invalid Reason	Invalidated	Invalidated By		ţ
	202223	CAROLYN LEMONS	9/10/2021	10/13/2022				ma	na



## FINISHING AN INCOMPLETE PRESCRIPTION (Written Orders Tab)

As you can see from the screenshot below, there are two prescriptions that have Image Entries, but do not have any Prescription Entries.

To finish entering the <u>Order Details</u> and <u>Enrollment Details</u>, just click the "Manage" link at the end of the row.

After you complete the prescription, you should see an entry in the *Prescription Entries* Table that corresponds with the entry in the *Images* Table.

Child Details (Jones, Jane) Child Number: C53000231487 DOB: 1/2/2017 Gender: F Address: County: SCHENECTADY District: Schenectady Matched?: N											
Enrollments	Written Order	rs IEPs (	Consents	Documents	CINs						
	Upload Prescription Image         Images are saved.           Prescription Images         Rx not complete.										
Description	SchoolYear	Signed By	Date Signed	Date Uploaded	Invalid Reason	Invalidated	Invalidated By				
	202223	CAROLYN LEMONS	9/10/2021	10/13/2022				manage			
	202223	CAROLYN LEMONS	9/1/2022	10/10/2022				manage			
Prescription Entries No prescription entries found for child Order Details are missing.											

# LIVE DEMONSTRATION

# QUESTIONS About Entering the Order Details Attaching the Enrollment

# McGuinness Medicaid-in-Education Contact Information

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# Follow-up

This presentation will be recorded and the PowerPoint presentation will be uploaded to the Portal Knowledge Base for future reference.

- Search for help in our Knowledge Base: <u>http://support.cpseportal.com/Main/Default.aspx</u>
- Portal Support Email: <u>Support@cpseportal.com</u>
- Medicaid Support Email: <u>Medicaid@CPSEPortal.com</u>
- Questions/Guidance regarding Medicaid compliance:

Contact Deborah Frank <u>dfrank@jmcguinness.com</u>, 518-393-3635, Ext. #41

#### HELPFUL LINKS

- CPSE Portal Knowledge Base Links for Medicaid
- http://support.cpseportal.com/kb/a231/medicaid-knowledge-base-links.aspx