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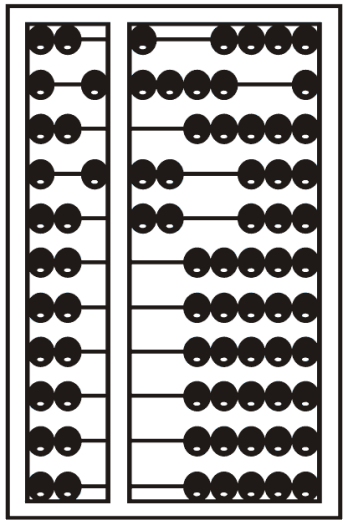
Consultants



Digital Speech Recommendations For SLPs

(Updated November 2020)

PURPOSE OF WEBINAR

Today's presentation is specifically for Speech-Language Pathologists, to discuss the benefits of creating a "Digital Speech Recommendation."

While we realize that SLPs will always have the option of writing a prescription on paper and then uploading it to the Portal, we think you will agree *(at the conclusion of this presentation)* that using the digital option is a win/win for all stakeholders.

We will walk you through the very quick and simple process of creating a digital speech recommendation and will highlight the benefits of using the digital option rather than the paper option.

TOPICS COVERED

- Benefits of Using the Digital Speech Recommendation
- Required Elements of a Written Order
- One-Time Set-up
- How to Create the Digital Speech Recommendation
- Troubleshooting the Digital Speech Recommendation Process
- Side-by-Side Comparison – Digital versus Paper
- Recap

CPSE PORTAL DIGITAL ORDER/RECOMMENDATION

What is a digital order/recommendation?

- It is a written order/recommendation *(for Speech Therapy Services)* that is created on the computer and digitally signed, rather than written on paper and signed with a pen.

- The digital order follows all the requirements of a paper order except that it is created and signed digitally.

ELECTRONIC SIGNATURES

Are electronic signatures acceptable? Yes.

"Electronic signatures are acceptable if adequate security is in place and confidentiality is maintained. The use of an electronic signature has the same validity as a signature affixed by hand. However, ***providers must be prepared to authenticate or prove that the record was electronically signed by the person authorized to sign the record****. Electronic signatures affixed by someone other than the actual practitioner are not allowable. An exception to this rule would apply where the applicable statute or regulation specifically requires a hand-written signature.* ***The provider's electronic medical record must have control features, such as pass codes or electronic signatures.****"*

Medicaid Questions and Answers (Questions 129 & 130): http://www.oms.nysed.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf

WHEN SHOULD YOU PREPARE YOUR RECOMMENDATION?

- There have been some questions regarding the timing of when the Medicaid Speech recommendation can be created.

- *The Medicaid Handbook states, "It should be noted that the written order/written referral must be in place "prior" to the initiation of services (prospective), including evaluations.*

- *Medicaid also has a written directive (Medicaid Q&A, #94) that states SLPs cannot write a speech recommendation until "after" the child has been seen.*

MEDICAID QUESTIONS & ANSWERS
Timing of the Speech Recommendation

Question #94:

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

Answer: No.

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

(http://www.oms.nysed.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf)

CLARIFICATION FROM SED
When the Recommendation Should be Completed

McGuinness reached out to the Medicaid-in-Education team at SED and received the following clarification.
*SLPs can write a Speech recommendation "**directly following**" the initial session with the child under the following circumstances:*****

- *The SLP uses the results of the initial evaluation (which should be delineated in the IEP).*
- *The SLP can be assured that the ordered services will meet the child's needs.*
- *The SLP can be assured that the child's level of function can be increased to the best possible outcome.*
- *If this criteria is met, the recommendation can be written on the same day "**after**" the initial session and the session will be Medicaid-eligible.*
- ***The date of the Speech recommendation must be the same date as the initial session with the child.***

(This has been confirmed with SED.)*

QUESTIONS

- Questions ???

CPSE PORTAL DIGITAL SPEECH RECOMMENDATION

(Reasons to Select the Digital Option)

What are the benefits of preparing a digital order rather than a hand-written order?

- ✓ The electronic digital order/recommendation, when successfully generated *(all fields successfully completed)*, ensures that all the Medicaid-required elements on the order have been filled in and filled in correctly; **resulting in a Medicaid-compliant order**.
- ✓ Since the digital order is Medicaid-compliant and verified upon completion, the order **will never show a status of "invalidated."**
- ✓ **The resulting digital order does not have to be uploaded to the Portal** saving the SLP and/or their agency the time that it takes to print, scan, upload and type in the order details.
- ✓ Once the ordering **practitioner's credentials**, contact information, License/NPI information, signature and Pin #, are set up in the Portal **they will be entered automatically on each subsequent digital order**.
- ✓ Once the **billing provider's contact information** is set up in the Portal **it will be entered automatically on each subsequent digital order.**

CPSE PORTAL DIGITAL SPEECH RECOMMENDATION

(Reasons to Select the Digital Option - Continued)

- ✓ The digital order does not need to be dated. **The signature date is generated automatically when the order is created.**
- ✓ All the **child's demographic information** (*name, date of birth, county, district and agency*) and the **term of service** for the ordered service is added to the recommendation automatically when the "*Create Speech Recommendation*" link is activated; **with just one click most of the recommendation is already completed!**
- ✓ Only the prescription date range *(if the default is not used), the* **ICD code** and **digital signature** needs to be entered to each digital order; only **two** *(or possibly three)* **out of the eight criteria**. The remaining required elements are entered to each digital order automatically; making this option very quick and simple!*****
- ✓ With a paper document upload the possibility exists that **one *(or more)* of the eight requirements will not be completed, or expressed in accordance with Medicaid guidelines**, resulting in a "invalid" order. Since an invalid order changes the Rx status to "missing" in the Portal, you will not be able to submit billing until a valid order has been completed. **A completed digital order/recommendation will never be invalidated resulting in no interruption in billing and will reduce requests for additional documentation.**

(If the one-time set-up is completed for the ordering practitioner and billing provider.)*

WHAT IS REQUIRED ON A MEDICAID WRITTEN ORDER?

Listed below is a list of all the required (8) elements of a Written Order. Only the items in **red** will need to be entered when creating the digital order; all other requirements will come up automatically* when the digital order is generated.

1. Child's Name.
2. Term of Service – The time period for which the service(s) are being ordered. *(Defaults to Entire School Year)*
3. The Service(s) being ordered *(including frequency & duration of the ordered service)*
4. **Patient Diagnosis** and/or reason/need for ordered service(s).
5. **Signature** of a NYS Medicaid enrolled provider who is a NYS licensed, registered, and/or certified, as relevant, physician, physician assistant, or licensed nurse practitioner acting within the scope of their practice.
6. Signature Date – The complete date the order was written and signed – Entered automatically when created.
7. Practitioner's NPI and/or License number(s).
8. Practitioner's Contact Information *(Office stamp or pre-printed address and telephone number permitted)*.

*(*if the one-time set-up is completed for the ordering practitioner and billing provider.)*

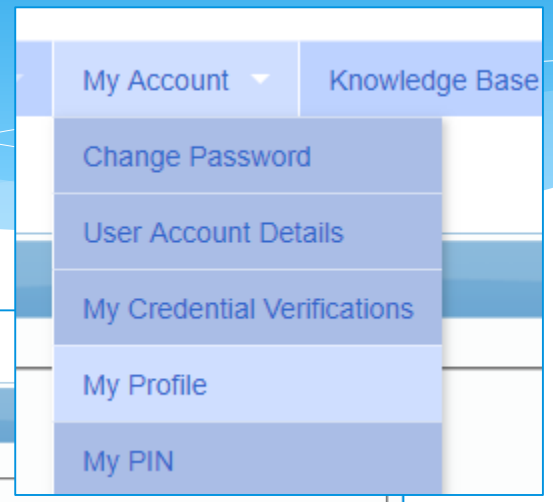
ELECTRONIC DIGITAL ORDER
One-Time Set Up – Ordering Practitioner

Prior to creating any digital order, there is a one-time set up that is required for the "practitioner." If this is not set up prior to creating the digital order, the SLP will not be able to complete the digital speech recommendation.

FOR THE ORDERING PRACTITIONER: (My Account>My Profile)

- ❑ Ordering practitioner name
  - NPI and license information
  - Provider contact information including address and phone number
  - Signature
    - ✓ Signature title and credentials must be entered
    - ✓ Pin # must be set up

ORDERING PRACTITIONER INFORMATION



My Profile

Personal and Professional | User Information | Favorites

Information in CPSE Database

Last Name: Stark

First Name: Shannon

NPI: 1003129438

Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP): Shannon Stark, M.A. CCC/SLP

Update

Licenses / Certifications / Professions [NYS Office of the Professions]

	Description	Credential Type	#	State	NY Profession Code	From	To	Active		
SLP	Licensed Speech & Language Pathologist	License	010654	NY	058	9/15/1998	12/31/2021	☑	Edit	Remove

Add

Information from NPPES NPI Registry

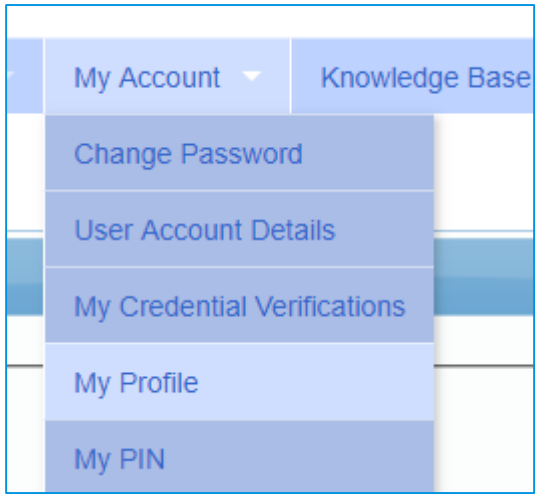
Click here for NPPES website

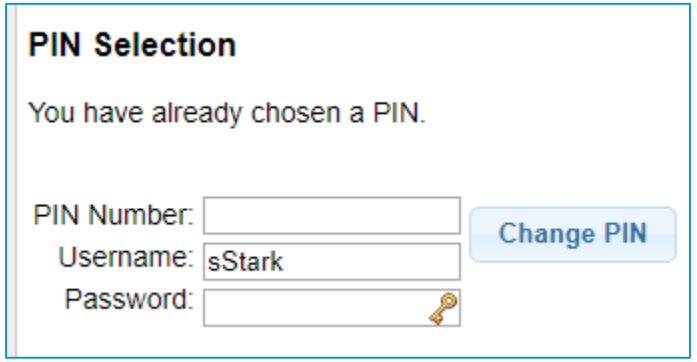
NPI 1003129438 This NPI is for an Individual

First Name SHANNON
Last Name STARK
Credentials M.A. CCC/SLP

Mailing Address 1 205 CROCKER HILL RD
Mailing Address 2
City BINGHAMTON State NY Zip 139042513

PIN FOR DIGITAL SIGNATURES





DIGITAL SPEECH RECOMMENDATION
One-Time Set Up – Billing Provider

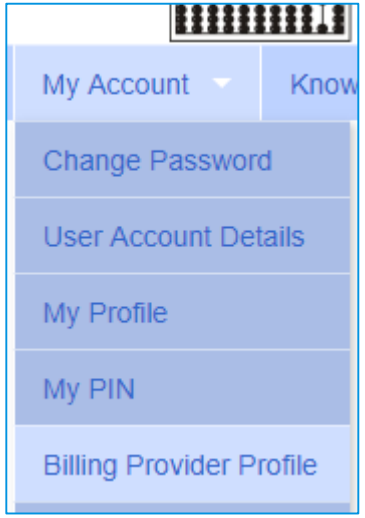
For the Billing Provider: (**My Account>Billing Provider Profile**)

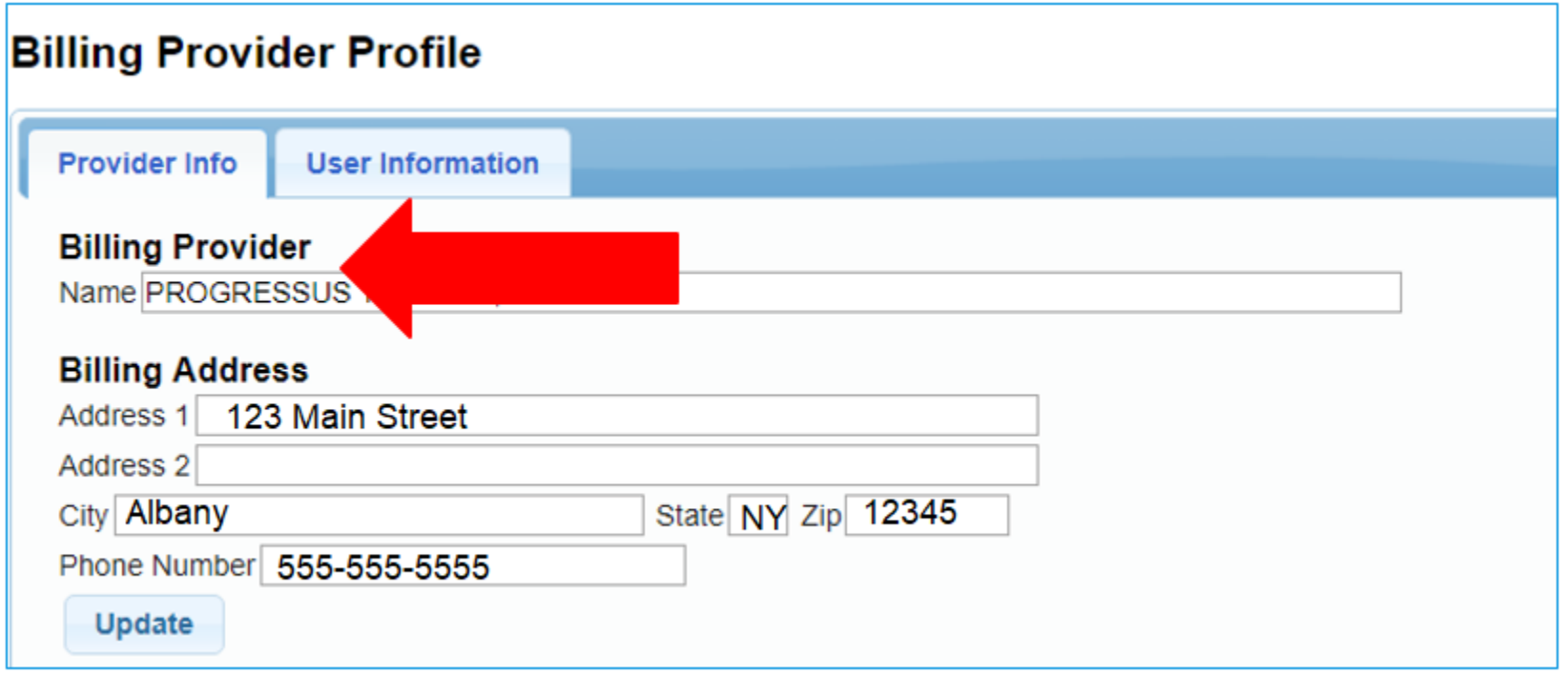
[If you are a therapist that has an independent vendor contract with the County and bill the County directly, you are a billing provider.
If you are a therapist employed by an agency, then the agency is the billing provider.]

- The Billing Provider must enter their billing information into the Portal (***address and phone number including area code***) to the Billing Provider Profile *(if not already entered)*. If this is not set up prior to creating the order, the SLP will not be able to complete the digital speech recommendation.

- The information entered for the billing provider becomes the contact information for the SLP on the Rx, which is required on all SSHSP prescriptions.

PROVIDER CONTACT INFORMATION





CPSE PORTAL DIGITAL SPEECH RECOMMENDATION
(How to Create the Digital Order/Recommendation)

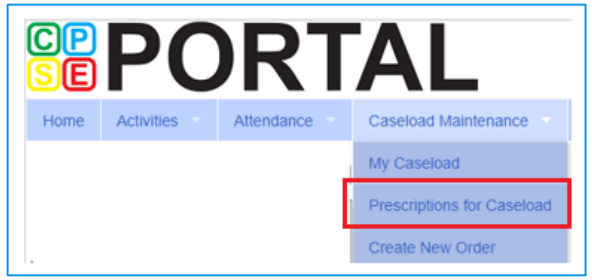
- There are two ways to create the digital order.

1) "**Prescriptions for Caseload**" under the Caseload Maintenance Menu.
   Caseload Maintenance>Prescriptions for Caseload
   *(Use this screen to enter **initial/new prescriptions**.)*

2) You can also use the "**Create New Order**" under the Caseload Maintenance Menu.
   Caseload Maintenance>Create New Order
   *(Use this screen to enter **subsequent prescriptions**. – e.g., when a change in service occurs and a new Rx is required.)*

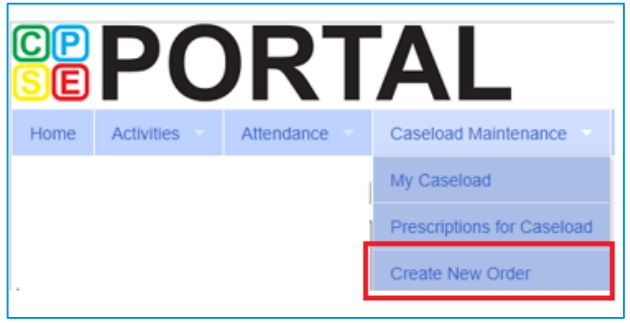
TWO WAYS TO ACCESS THE DIGITAL ORDER SCREEN

1. **Caseload Maintenance>Prescriptions for Caseload**



Use this option for initial prescriptions.

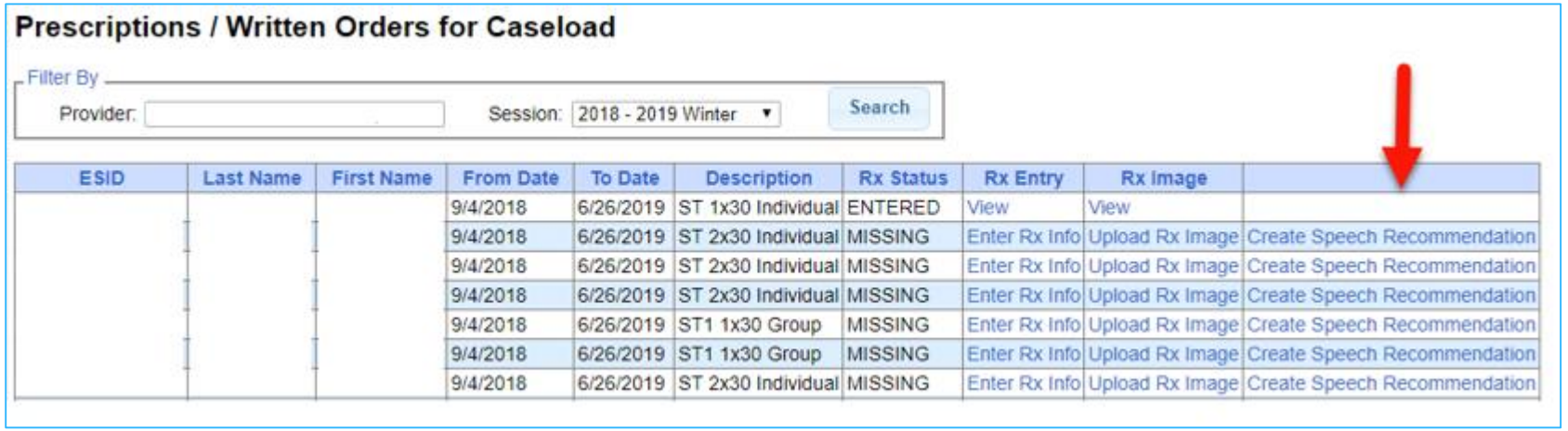
2. **Caseload Maintenance>Create New Order**



Use this option for subsequent prescriptions – *e.g., when there is a change in service and a previous Rx already exists.*

PRESCRIPTIONS FOR CASELOAD

For children who do not have a written order, you will see an additional column on the "Prescriptions / Written Orders for Caseload Screen that shows a link, ***"Create Speech Recommendation."***



Prescriptions / Written Orders for Caseload

Filter By

Provider: Session: 2018 - 2019 Winter Search

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
			9/4/2018	6/26/2019	ST 1x30 Individual	ENTERED	View	View	
			9/4/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/4/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/4/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/4/2018	6/26/2019	ST1 1x30 Group	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/4/2018	6/26/2019	ST1 1x30 Group	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
			9/4/2018	6/26/2019	ST 2x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

1. Click the "***Create Speech Recommendation***" link. When the link is activated, **six of the eight** required items will autofill the digital order template *(Child's name, DOB, county, district, agency & term of service – date range).*

2. You will fill in the two remaining fields to complete the digital order.
   - **Enter all applicable ICD Codes**
   - **Preview & Digitally Sign (with your Pin #)**

(This option is only available to SLPs. The last column shown above will not be available to other disciplines.)

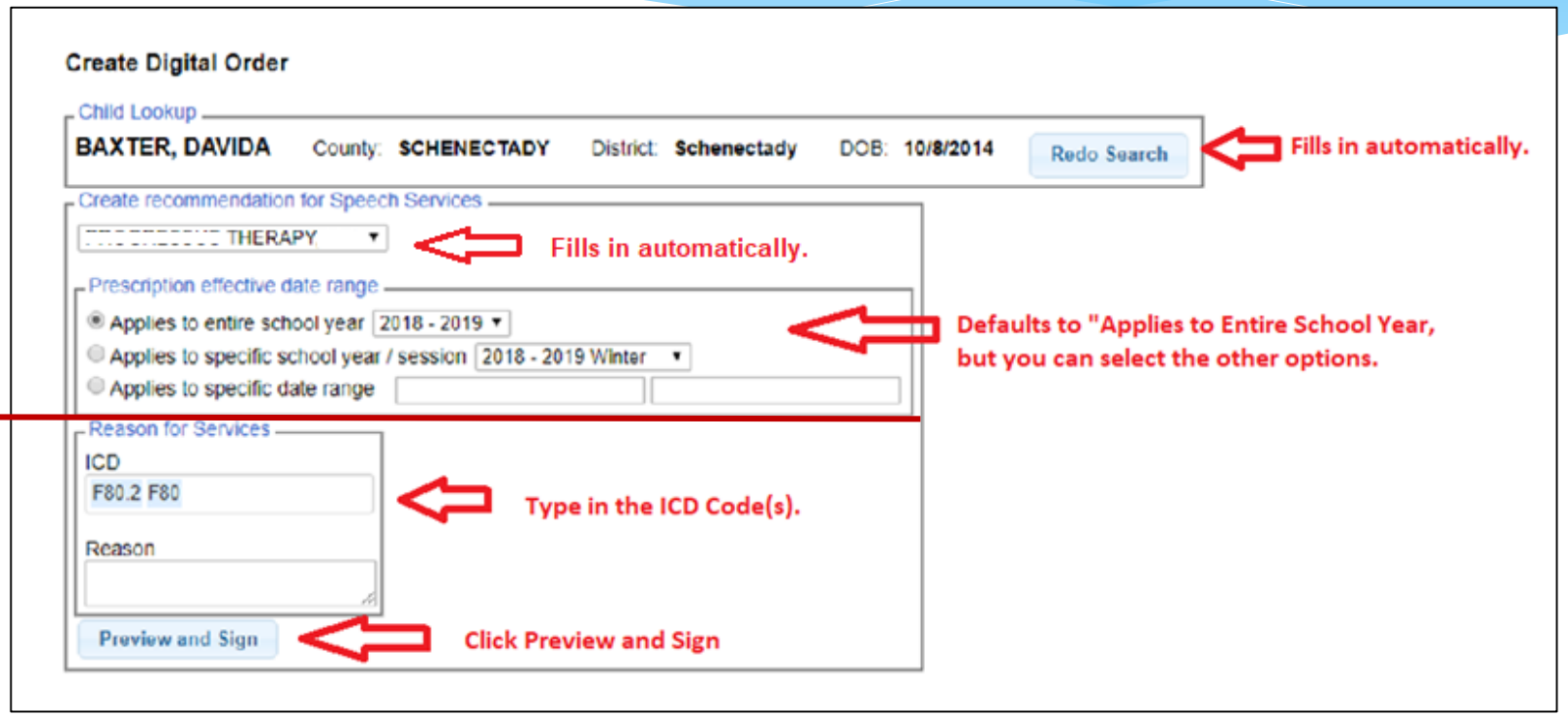
CREATING THE DIGITAL ORDER

Everything above this line is auto-filled from information already in the Portal.

(Child's Name, DOB, County, District, Agency, Term of Service/date range - Six of the eight items)

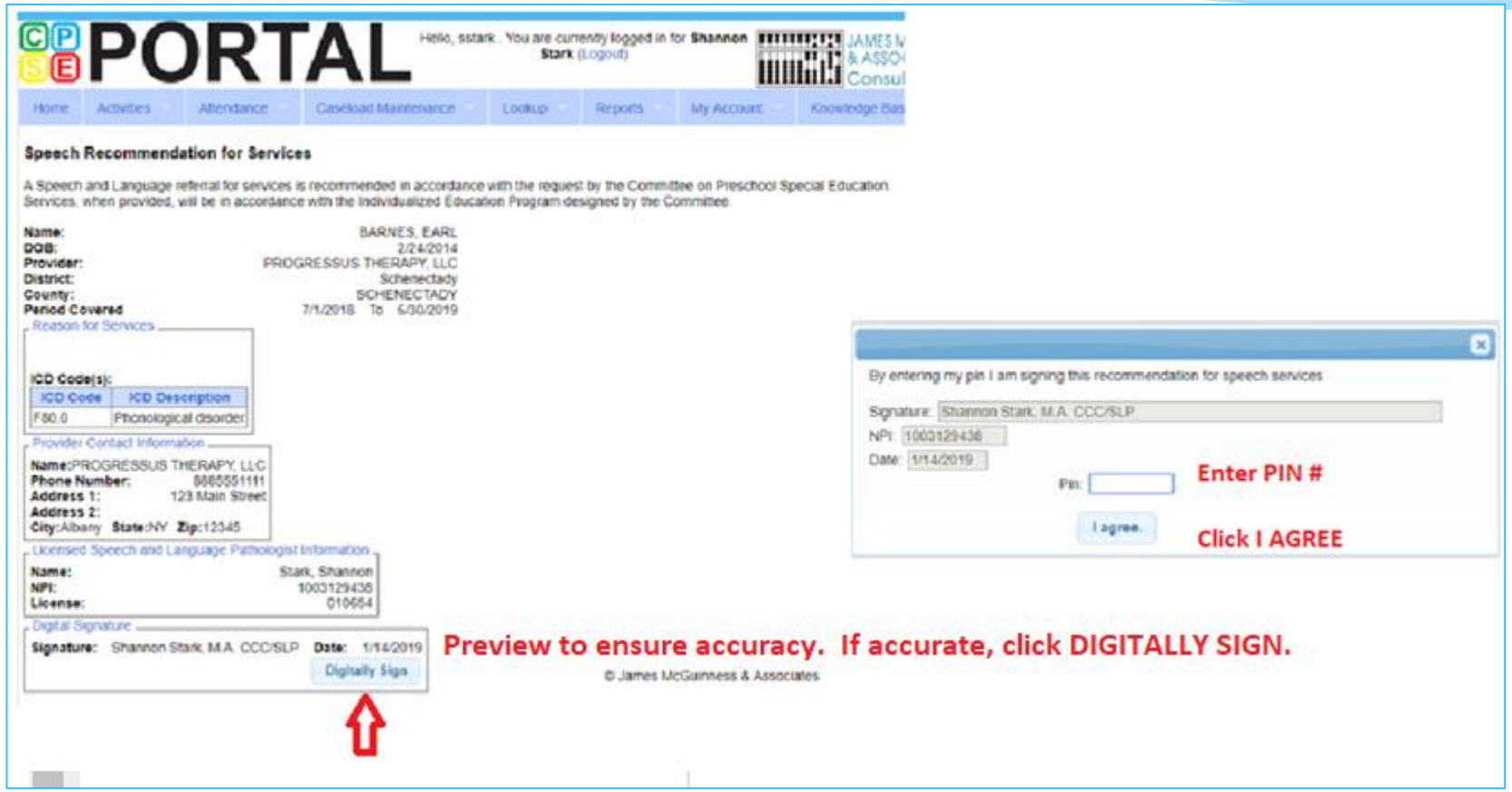
The two items below this line will be completed by the SLP.

1. ICD Code(s)
2. Digital Signature *

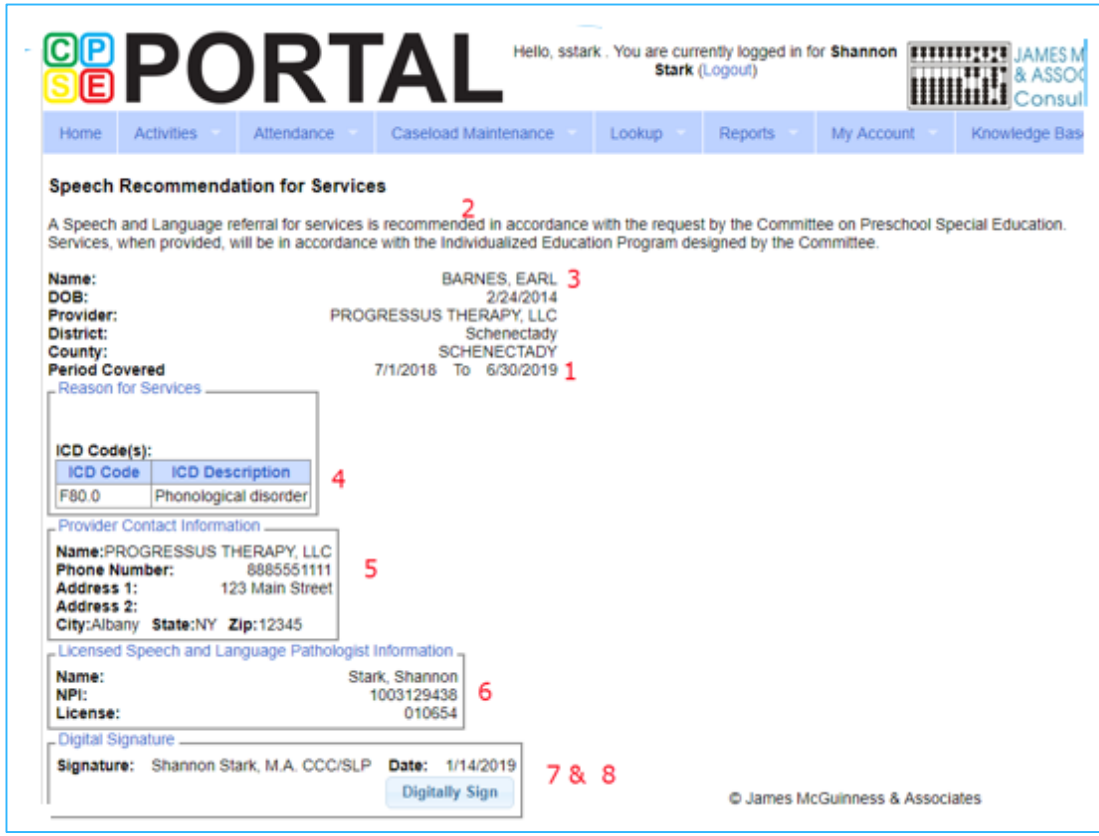


* ***NOTE:*** ***The date the digital recommendation is created, becomes the signature date*** *of the recommendation and is the* ***first date that Medicaid can be billed****. The SLP may need to create an "****unmatched enrollment****" that the agency will need to "match" once the official record has been created. More on this topic later in the presentation.*

PREVIEW & SIGN THE DIGITAL ORDER



REQUIRED ELEMENTS OF A WRITTEN ORDER



CPSE PORTAL

Hello, sstark . You are currently logged in for **Shannon Stark** (Logout)

JAMES M & ASSOC Consul

Home | Activities | Attendance | Caseload Maintenance | Lookup | Reports | My Account | Knowledge Bas

Speech Recommendation for Services

A Speech and Language referral for services is recommended in accordance with the request by the Committee on Preschool Special Education. Services, when provided, will be in accordance with the Individualized Education Program designed by the Committee. 2

Name: BARNES, EARL 3
DOB: 2/24/2014
Provider: PROGRESSUS THERAPY, LLC
District: Schenectady
County: SCHENECTADY
Period Covered 7/1/2018 To 6/30/2019 1

Reason for Services

ICD Code(s):

ICD Code	ICD Description
F80.0	Phonological disorder

4

Provider Contact Information

Name:PROGRESSUS THERAPY, LLC
Phone Number: 8885551111
Address 1: 123 Main Street
Address 2:
City: Albany **State:**NY **Zip:**12345

5

Licensed Speech and Language Pathologist Information

Name: Stark, Shannon
NPI: 1003129438
License: 010654

6

Digital Signature

Signature: Shannon Stark, M.A. CCC/SLP **Date:** 1/14/2019
Digitally Sign

7 & 8

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1. The time period for which services are being ordered;
2. The service(s) being ordered (including specific frequency or per IEP)
3. Child's name
4. Patient Diagnosis
5. Provider's contact information including address and phone #
6. Ordering practitioner's NPI or license #
7. Signature
8. Date the order was written and signed

DOWNLOADABLE / PRINTABLE COPY

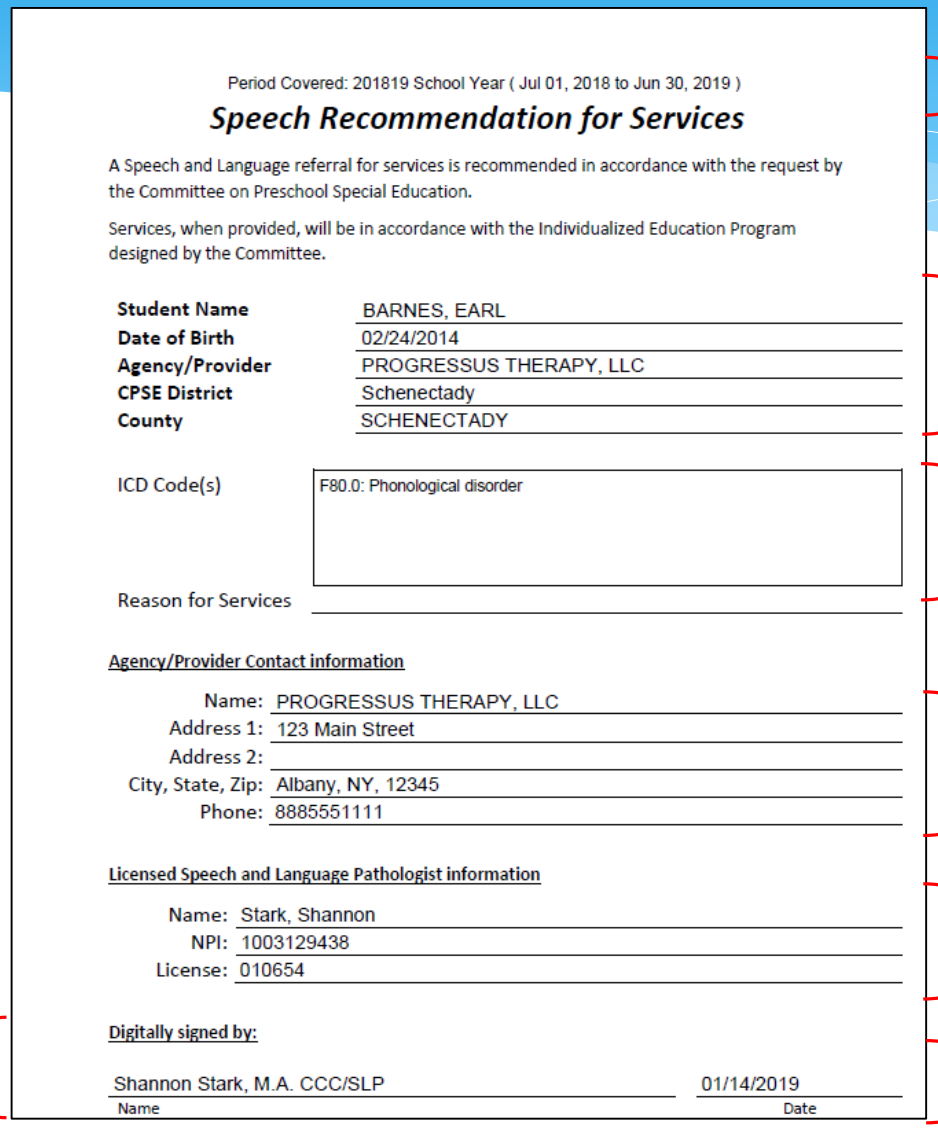
If you **are not successful in creating the digital speech recommendation,** look at where the information is pulling from (noted in red) and try to determine if anything needs to be entered.

ITEMS TO CHECK:

- **Create Digital Order Screen**
  - ✓ Data Entered by SLP (ICD Code & Signature)
- **My Account>Billing Provider Profile**
  - ✓ Address/Phone #
- **My Account>My Profile**
  - ✓ Name, NPI, License
  - ✓ Signature & Credentials
  - ✓ Digital Signature Set-up

The resulting Rx does not need to be printed, scanned, uploaded or entered into the Portal. The Rx is verified upon completion.

The Signature fills from the **My Profile Screen** (My Account>My Profile). If your signature and credentials are not filled in, the order cannot be created.



Period Covered: 201819 School Year (Jul 01, 2018 to Jun 30, 2019)

Speech Recommendation for Services

A Speech and Language referral for services is recommended in accordance with the request by the Committee on Preschool Special Education.

Services, when provided, will be in accordance with the Individualized Education Program designed by the Committee.

Student Name	BARNES, EARL
Date of Birth	02/24/2014
Agency/Provider	PROGRESSUS THERAPY, LLC
CPSE District	Schenectady
County	SCHENECTADY

ICD Code(s): F80.0: Phonological disorder

Reason for Services:

Agency/Provider Contact information

Name: PROGRESSUS THERAPY, LLC
Address 1: 123 Main Street
Address 2:
City, State, Zip: Albany, NY, 12345
Phone: 8885551111

Licensed Speech and Language Pathologist information

Name: Stark, Shannon
NPI: 1003129438
License: 010654

Digitally signed by:

Shannon Stark, M.A. CCC/SLP (Name) 01/14/2019 (Date)

Unless another option is selected the default time period/term of service **will autofill** when the **"Create Speech Recommendation"** link is clicked.

This block of information fills in automatically when you click on the **"Create Speech Recommendation"** link.

This fills from the **"Create Digital Order" Screen**. This is one of the two fields that is entered by the SLP.

This block of information fills in from the **Billing Provider Screen** (My Account>Billing Provider Profile). If this is not filled in, the order cannot be created. This should be updated by the Agency.

This block of information fills in from the **My Profile Screen** (My Account>My Profile). If this is not filled in, the order cannot be created. Updated by the SLP.

The signature date **fills in automatically when created**.

HOW DO I KNOW IF A DIGITAL SPEECH RECOMMENDATION HAS BEEN COMPLETED?

- Go to **Caseload Maintenance>Prescriptions for Caseload**
  - A list of children on your caseload will come up.
  - You will see the status of your prescription (Entered, Verified, Invalidated, Missing)
  - You will also see that the ***Create Speech Recommendation*** link is not an option and the Enter Rx Info and Upload Rx Image Link now displays "**View.**"
  - If you click on VIEW for the Rx Image, you will be able to print the digital speech recommendation.

Link is removed when Rx is completed.

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
			9/8/2020	6/25/2021	ST 1x30 Individual	VERIFIED	View	View	
RS2021W01			9/8/2020	6/25/2021	ST 1x60 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
RS2021W01			9/8/2020	6/25/2021	ST 1x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

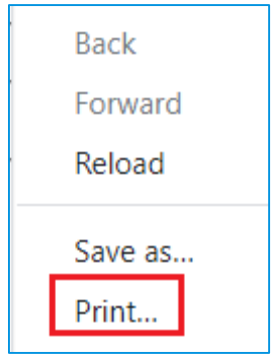
QUESTIONS

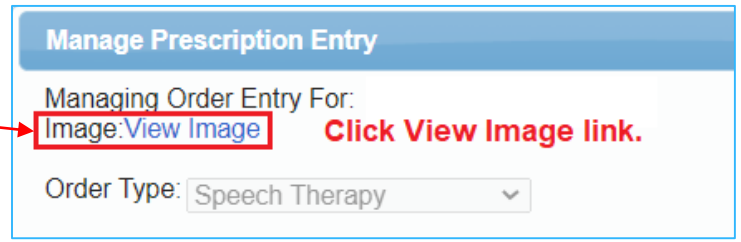
- Questions ???

HOW TO PRINT RX FROM PRESCRIPTIONS FOR CASELOAD

- Click the "View" link in either the Rx Entry or Rx Image column.

- From the **Rx Entry** column, click "View."
- Click the "**View Image**" link.
- Right Click>Print





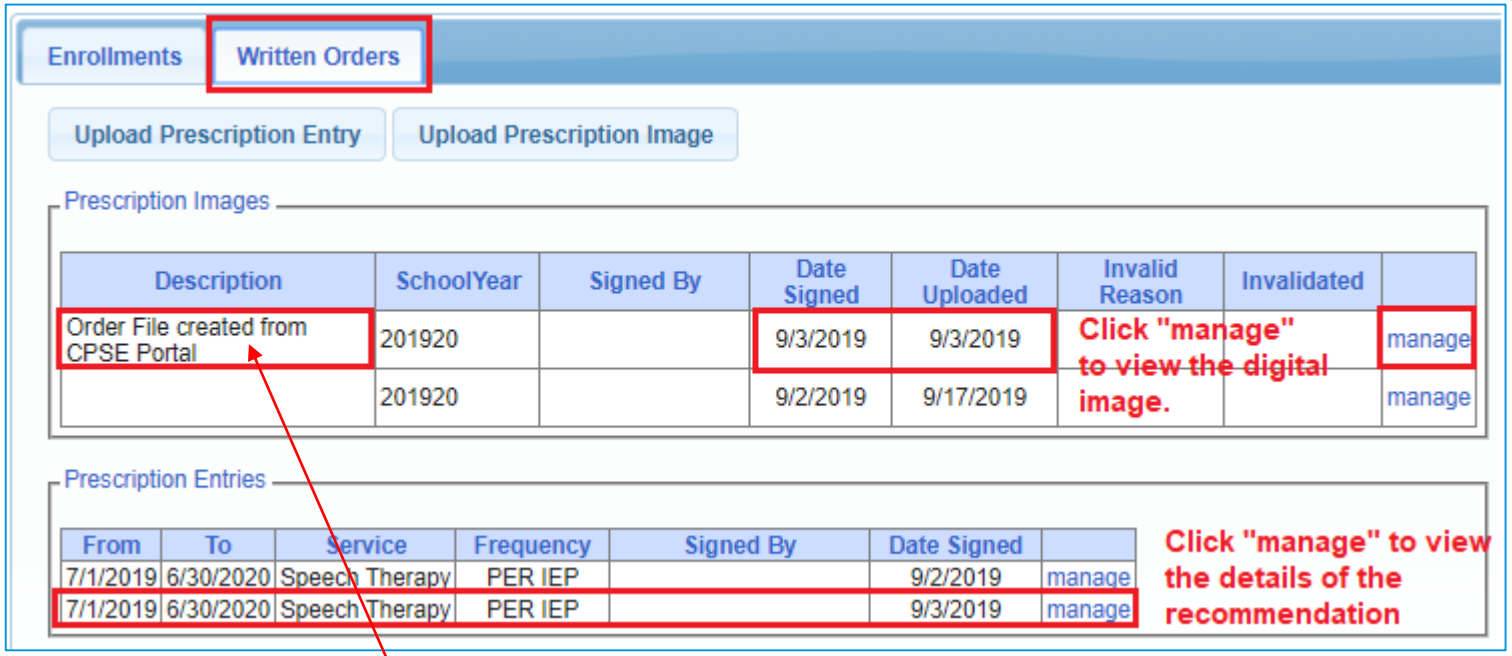
** OR **

- From the **Rx Image** column, click "View."
- Click the "**View Order File**" link.
- Right Click>Print

HOW DO YOU KNOW IF A DIGITAL SPEECH RECOMMENDATION HAS BEEN COMPLETED?

(From Child Lookup)

- Go to **Lookup>Child Lookup>Type the name of the child>Search>Details>Written Orders Tab**

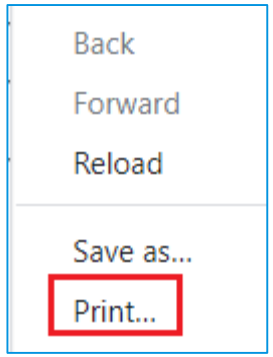


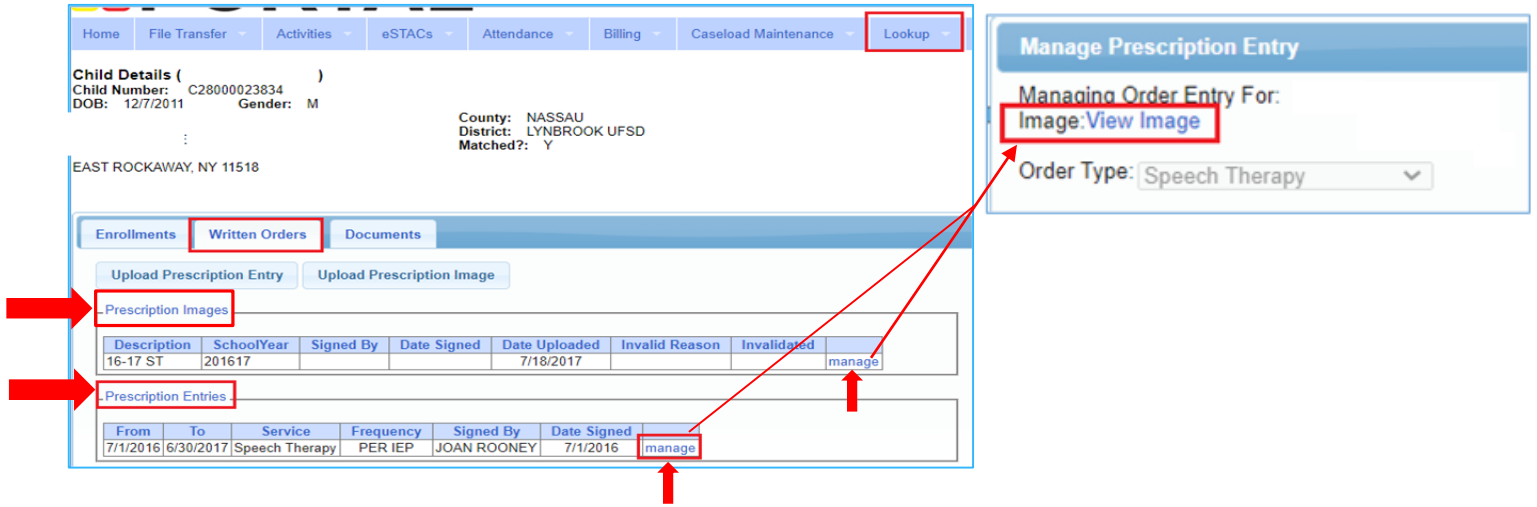
- Under **Prescription Images** - Description column, you will notice, "**Order File created from CPSE Portal.**" This tells you that you have successfully completed the digital speech recommendation and shows you the date it was signed and uploaded/created. Click "**manage**" to view the digital Rx Image or Rx Entry.

HOW DO YOU PRINT THE DIGITAL RECOMMENDATION?

Go to **Lookup>Child Lookup**

- Type in the name of the child>**SEARCH**
- Click **Details**
- Click the **Written Orders Tab**
- You will see two tables: **Prescription Images** & **Prescription Entries**
- Click the "**Manage**" link in either table to view the recommendation
- Click "**View Order File**" or "**View Image**" The recommendation will come up.
- **Right click** and Select **Print**





TROUBLESHOOTING

- There is a **one-time set-up** *(for both the billing provider and the therapist)* that fills in some of the "required" components of the digital speech recommendation. Have both profiles been completed?

    1. **ONE FOR THE BILLING PROVIDER** (**My Account>Billing Provider Profile**) including:
        - ✓ complete billing address, and
        - ✓ phone number (including area code)

    2. **ONE FOR THE ORDERING PRACTITIONER - SLP** (**My Account>My Profile**) including:
        - ✓ The ordering practitioner's name,
        - ✓ NPI and license numbers,
        - ✓ Signature, title and credentials, and
        - ✓ Pin # (for the digital signature)

- Did you enter the **ICD Code(s)**? *(This is a required field. The order will not be completed without the ICD Code.)*

- Did you click "**Preview and Sign**" to *preview* and *digitally sign* the completed order? Did you click **SAVE**?
  (This is a required field. The order will not be completed without the SLP's digital signature.)

***The Create Speech Recommendation* link is *not available*, why?**

If the child had a prescription previously, you will need to use the "**Create New Order**" (Caseload Maintenance>Create New Order) option for subsequent digital orders.

TROUBLESHOOTING

I completed the Digital Speech Recommendation, but it says that the image is not attached. ***-- OR --***

I completed the Digital Speech Recommendation and it still shows as missing.

If you completed the prescription details **without being prompted to digitally sign with your Pin #** (Preview and Sign) , you are using the **Prescription Entry Screen for the paper document upload process; not the Digital Speech Recommendation Screen**.

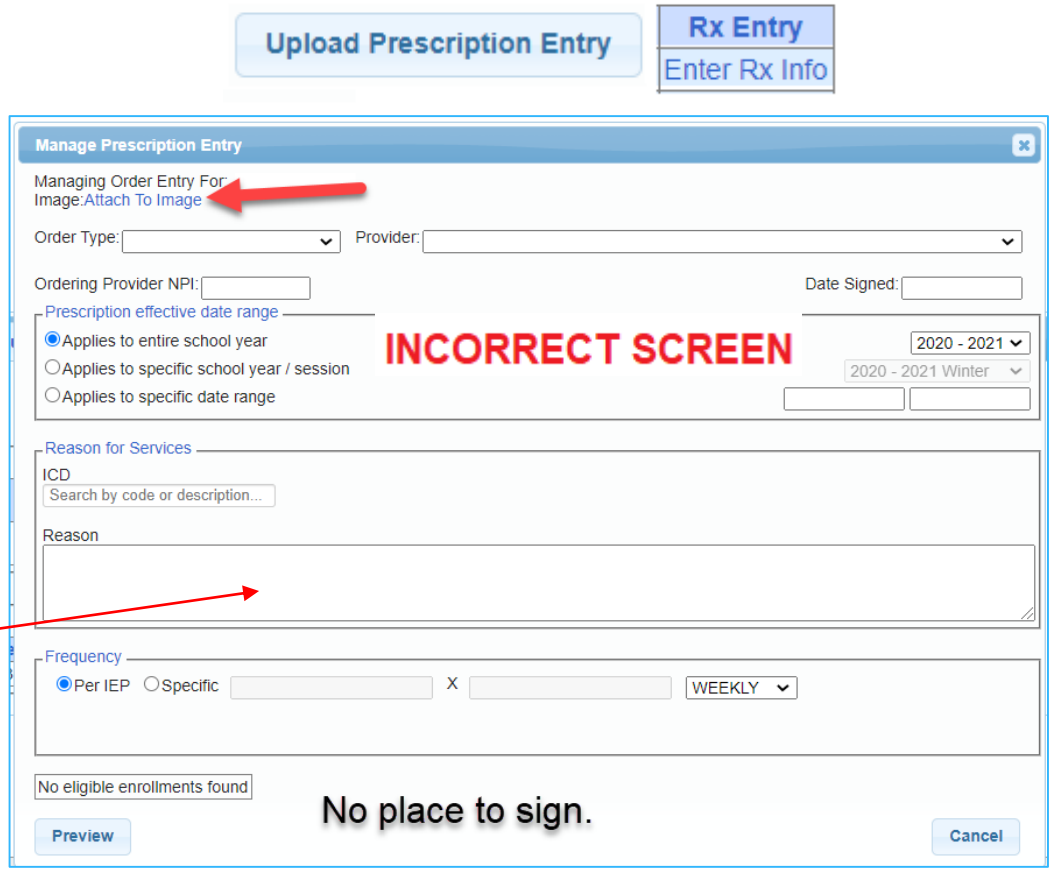
This is the Prescription Entry Screen from either:

Caseload Maintenance>Prescriptions for Caseload>clicked Rx Entry --or--

Medicaid>Prescriptions>Prescription Entry Maintenance >Upload Prescription Entry.

THIS IS NOT THE DIGITAL ORDER SCREEN!!

IF THERE IS **NO PLACE TO SIGN WITH YOUR PIN #,** IT SHOULD BE A CLUE THAT **YOU ARE NOT ON THE CORRECT SCREEN FOR THE DIGITAL ORDER.**



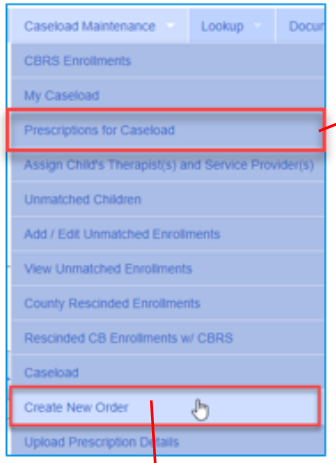
TROUBLESHOOTING
(**Caseload Maintenance**>Prescriptions for Caseload or Create New Order)

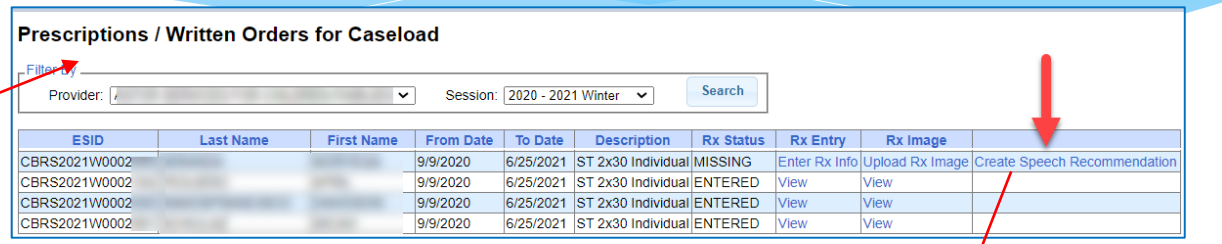
The screen you should be using is:

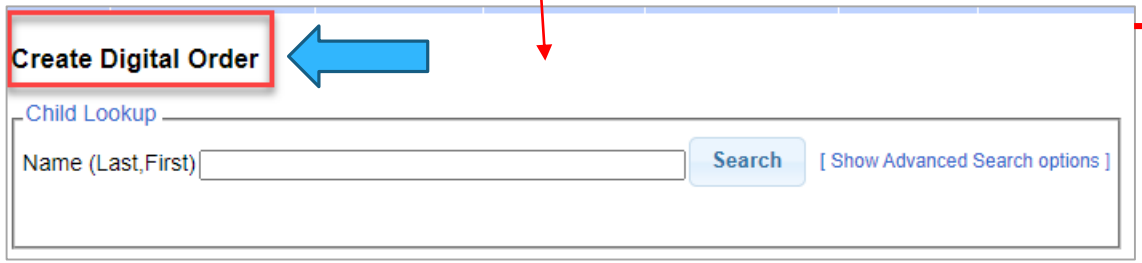
Caseload Maintenance>Prescriptions for Caseload

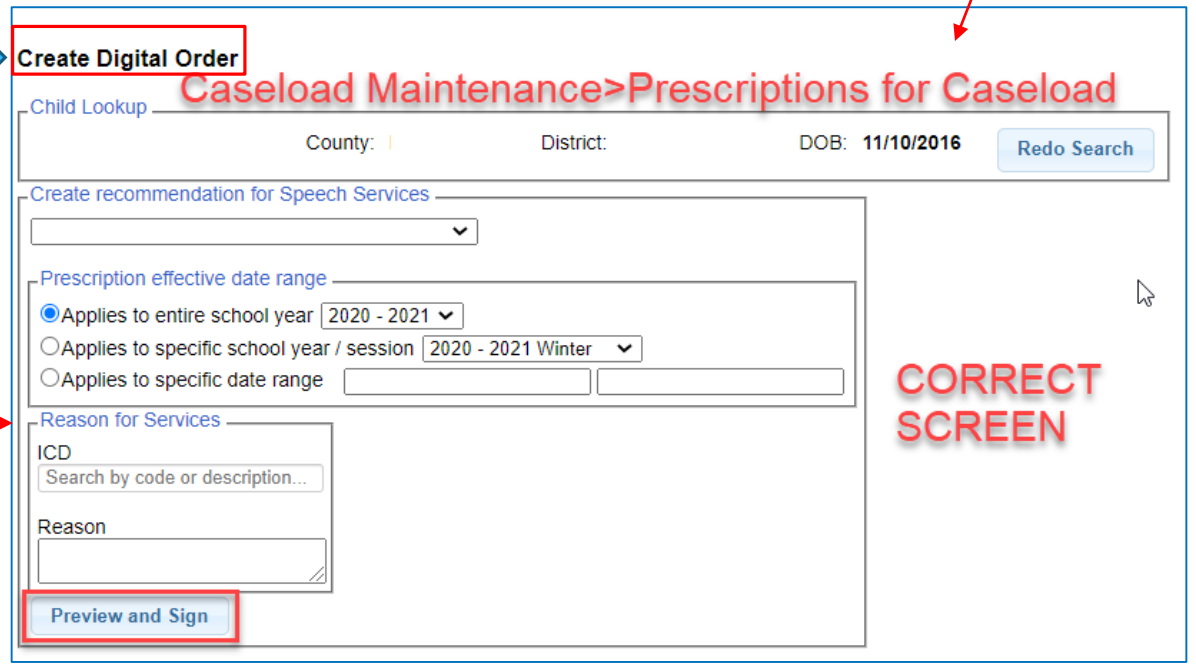
--or--

Caseload Maintenance>Create New Order.









QUESTIONS

- QUESTIONS ???

IS THERE A WAY TO DETERMINE IF I HAVE COMPLETED A RECOMMENDATION FOR ALL CHILDREN ON MY CASELOAD?

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

  - **Medicaid>Missing Documents>Missing Scripts**

    This report will show what is missing, verified and/or not verified.

  - **Caseload Maintenance>Prescriptions for Caseload**

    This report will show the status for each child on your caseload.

    (Missing, Verified, Entered, Invalidated/Reason)

MISSING PRESCRIPTIONS REPORT

Medicaid>Missing Documents>Missing Scripts

Missing Scripts

Filters

Provider ▼ Session 2018 - 2019 Winter ▼ County NASSAU ▼ Retrieve

Show Missing Scripts ☑ Show Not Verified Scripts ☐ Show Verified Scripts ☐

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

PRESCRIPTION STATUS
Caseload Maintenance>Prescriptions for Caseload

Prescriptions / Written Orders for Caseload

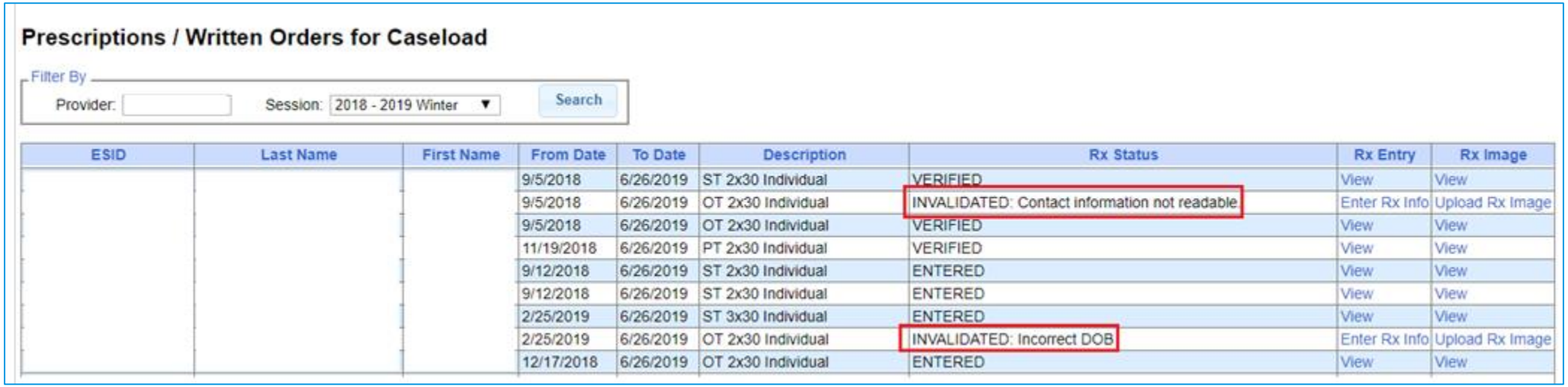
Filter By

Provider: ▼ Session: 2018 - 2019 Winter ▼ Search

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

PRESCRIPTION STATUS
Caseload Maintenance>Prescriptions for Caseload

Please note the status of **"Invalidated"** below. Since a Medicaid-compliant order is guaranteed when you use the digital order option, you will not have to worry about your orders being invalidated due to missing or incorrect information.



Prescriptions / Written Orders for Caseload

Filter By

Provider: Session: 2018 - 2019 Winter Search

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image
			9/5/2018	6/26/2019	ST 2x30 Individual	VERIFIED	View	View
			9/5/2018	6/26/2019	OT 2x30 Individual	INVALIDATED: Contact information not readable	Enter Rx Info	Upload Rx Image
			9/5/2018	6/26/2019	OT 2x30 Individual	VERIFIED	View	View
			11/19/2018	6/26/2019	PT 2x30 Individual	VERIFIED	View	View
			9/12/2018	6/26/2019	ST 2x30 Individual	ENTERED	View	View
			9/12/2018	6/26/2019	ST 2x30 Individual	ENTERED	View	View
			2/25/2019	6/26/2019	ST 3x30 Individual	ENTERED	View	View
			2/25/2019	6/26/2019	OT 2x30 Individual	INVALIDATED: Incorrect DOB	Enter Rx Info	Upload Rx Image
			12/17/2018	6/26/2019	OT 2x30 Individual	ENTERED	View	View

UNMATCHED ENROLLMENTS & DIGITAL ORDERS

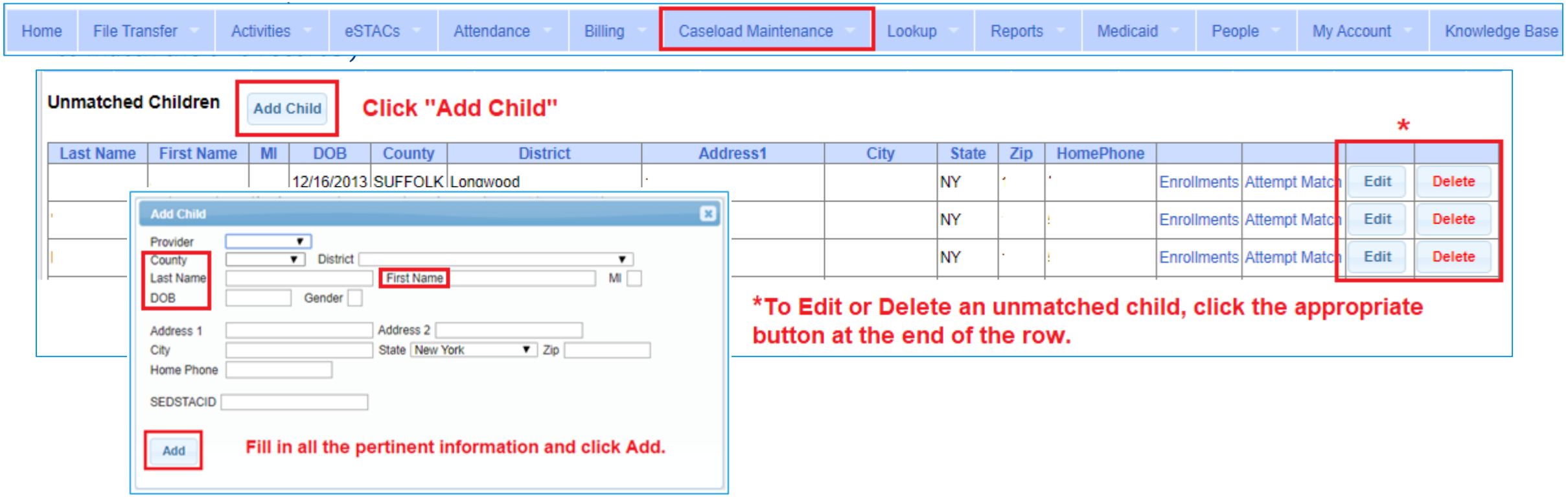
How does this work when the county/school district doesn't create an enrollment until after the service starts?

- **Do Not wait** for the "official" enrollment to be entered by the county/school district before completing the digital order. You will most likely have to begin therapy prior to the creation of the official enrollment.
- SLPs/Agencies have the ability to create **"unmatched" children and enrollments**.
- Unmatched children and enrollments are ***placeholders***. They **exist so you can work contemporaneously** while waiting for the official record to be created *(by the county or school district)*.
- With an unmatched child and/or enrollment, you can **complete treatment logs, create digital orders, upload prescriptions**, etc.
- When the official record is created, the billing provider *(agency/independent provider)* will need to "**match**" the temporary *(unmatched)* record to the official record. The matching process moves all the written orders, treatment logs, etc., to the "official" record and the temporary *(unmatched)* record is deleted.
- **Independent providers will need to complete both processes** *(creating the unmatched child/enrollment and then matching)*.

HOW TO CREATE AN UNMATCHED CHILD

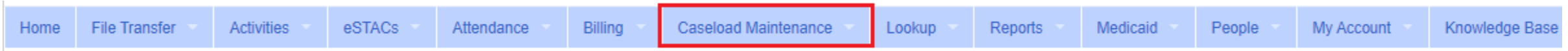
- **Go to Caseload Maintenance>Unmatched Children>Click Add Child**
- **Fill in the "Add Child" Screen>Click Add**

(Make sure this information is correct, if the official record has different information (i.e., different DOB or service dates), the two records will not match.)

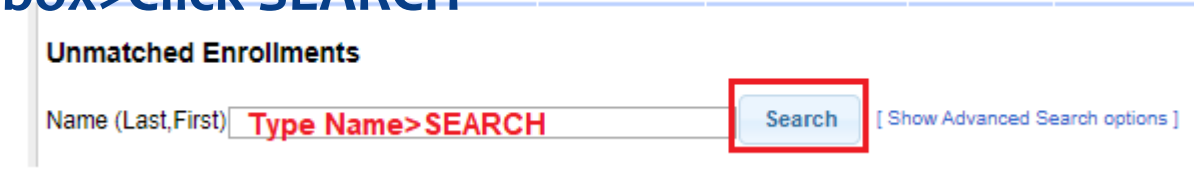


HOW TO CREATE AN UNMATCHED ENROLLMENT

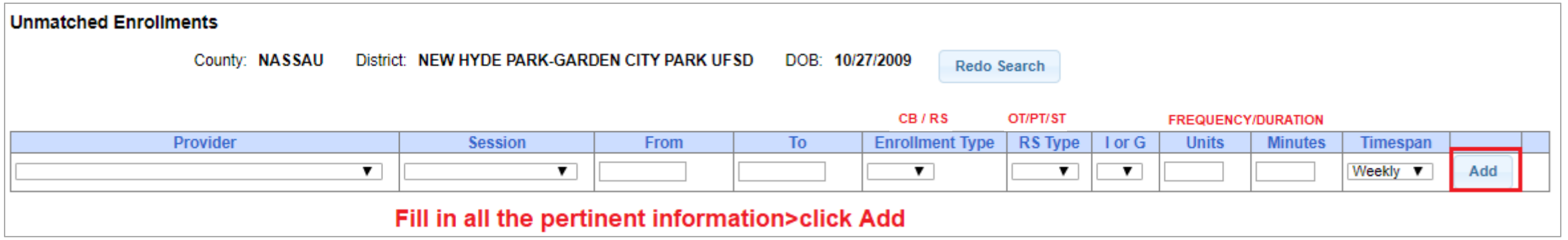
- **Go to Caseload Maintenance>Add/Edit Unmatched Enrollments**



  - **Type the child's name into the Name box>Click SEARCH**



  - **Fill in all the pertinent information in the table** *(Session, From/To Dates, Enrollment Type, RS Type, I/G, Freq/Dur, Etc.)*.
  - **Click "Add" at the end of the row.**



QUESTIONS

- QUESTIONS ???

COMPARISON
SPEECH DIGITAL OPTION VERSUS PAPER OPTION

DIGITAL OPTION	PAPER OPTION
• When successfully generated always produces a Medicaid-compliant order/recommendation and **will never show a status of "invalidated."**	• The possibility exists that **one (*or more*) of the eight required items will not be completed, or not expressed in accordance with Medicaid regulations**, **resulting in an invalid order**. Invalid orders interrupt billing and **generates requests for back documentation.**
• The resulting digital order **does not** have to be printed, scanned uploaded and entered into the Portal.	• After the paper document is completed it **will** need to be printed, scanned, uploaded and entered into the Portal.
• The time period of the ordered service(s) as well as all of the child's demographic information (*name, date of birth, county, district and agency*) **are entered automatically** when the link is clicked to generate the order.	• If the **time period** is not included, the child's **name is spelled incorrectly**, the **date of birth is written incorrectly,** or **another child's written order was uploaded, the order will be deemed "invalid"** and you will receive a request for replacement documentation.

COMPARISON
SPEECH DIGITAL OPTION VERSUS PAPER OPTION
(Continued)

DIGITAL OPTION	PAPER OPTION
• Once the information for the **practitioner and billing provider** are entered into the Portal (**one-time set-up**) the following items **will populate automatically** each time an order is generated - ***License/NPI #s, signature date, practitioner credentials and practitioner contact information.***	• The possibility exists that the SLP may **omit some pertinent information** when completing the order (*such as **license/NPI or contact information**).* The SLP may also submit the order **without signing or dating** the paper document, which will invalidate the order. **An invalid order will also generate a request for back documentation**.
• *SLP is only required to enter **two out of the eight** criteria (**ICD code and digital signature** (Pin #) to complete the digital order.*	• SLP has to hand write **all eight** elements. If any of the required items are **missing, illegible or the scanned document is not readable, the order will be deemed invalid. An invalid order will also generate a request for additional/replacement documentation.**

RECAP

The digital option will…

- ✓ *Auto-fill **six of the eight** required items*
- ✓ *Ensure a **Medicaid-compliant order***
- ✓ ***Ensure no interruptions in billing** or Medicaid claiming**
- ✓ ***Reduce** or eliminate **requests for additional or replacement documentation****
- ✓ *SAVE TIME – NO PRINTING, SCANNING, UPLOADING OR ENTERING REQUIRED!*

A win/win for the SLP, Agency and County!!

** If the order is generated by the first session with the child.*

ENTERCLAMS DIGITAL SPEECH ORDER

For our CLAIMS / ENTERCLAIMS clients, McGuinness will be hosting a webinar on the **EnterClaims Digital Speech Order** on **Thursday, December 3, 2020 at 3:30**.

Your Client Relationship Manager will be sending you the registration link.

Still Have Questions?

- Still unsure about using the digital option?
- Need more information?
- Would you like assistance creating a digital order?
- If so, please send an email to **Deborah Frank – dfrank@jmcguinness.com**
  - Include the best time to call.
  - Make sure to include your phone number (including area code).

FOLLOW-UP

- **This presentation will be recorded and the PowerPoint presentation will be uploaded to the Portal Knowledge Base for future reference.**
  - Search for help in our **Knowledge Base:** http://support.cpseportal.com/Main/Default.aspx
  - Email the CPSE Portal Support Team: support@CPSEPortal.com
  - **Questions/Guidance regarding Medicaid compliance: Contact Deborah Frank –** dfrank@jmcguinness.com

- **HELPFUL LINKS**
  - **Entering Unmatched Children and Unmatched Enrollments**
    http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx
  - **Matching Unmatched Children & Enrollments**
    http://support.cpseportal.com/kb/a175/matching-unmatched-children-and-enrollments.aspx
  - **Creating a Digital Speech Recommendation**
    http://support.cpseportal.com/kb/a163/creating-a-digital-speech-recommendation.aspx

- **MEDICAID REFERENCES**
  - Provider Policy & Billing Handbook - http://www.oms.nysed.gov/medicaid/handbook/
  - Medicaid Questions & Answers – http://www.oms.nysed.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf