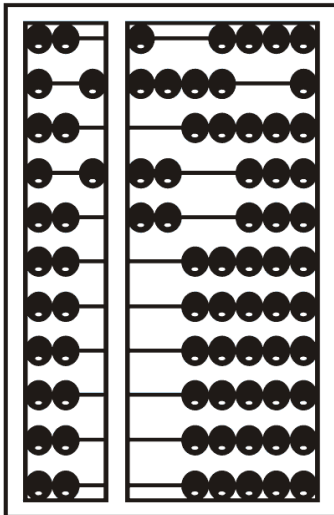


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Welcome to Full-Service
Medicaid with
James McGuinness &
Associates, Inc.
(Herkimer County – April 2025)

INTRODUCTIONS

Who will you be working with at McGuinness?

Deborah Frank, McGuinness Medicaid Specialist

- *Kelly Knowles, McGuinness Medicaid Team*
- *Ellen Farney, McGuinness Medicaid Team*
- *Darcy McMullen, McGuinness Medicaid Team*

EMAIL ANNOUNCEMENT

- James McGuinness and Associates will be working with Herkimer County as their Medicaid contractor/claiming agent.
- All providers should have received an email from the County explaining that McGuinness will be handling Medicaid claiming/billing for Herkimer County for service dates beginning **September 1, 2025**.

WHAT IS THE PURPOSE OF THIS WEBINAR?

- ❑ This is not a training; it is a high-level overview of what lies ahead.
- ❑ We are looking to:
 - *Provide you with an introduction to the upcoming expectations/requirements*
 - *Share a timeline for the implementation process*
 - *Let you know what you can do to ensure a smooth transition*

MEDICAID REQUIREMENTS

☐ **Prescriptions/Digital Recommendations**

- *Hardcopy Prescriptions (OT/PT/Psychological Counseling)*
- *Digital Speech Recommendations (Speech)*
- *OT Prescriptions (Required for Medicaid Purposes)*
- *Prescription Templates (in CPSE Portal Knowledge Base)*

☐ **SLP Requirements**

- *OPRA Enrollment (Required)*
- *Digital Speech Recommendations (Required)*
- *Speech Prescriptions from Community Practitioners (Required)*

☐ **Approvals** *(Must be approved in order to submit billing to the county)*

- **Credentials**
- **Signatures**
- **Service Locations**

☐ **Center-Based Related Service Vouchers** *(Must be submitted at the same time as the CB-Tuition Voucher)*

☐ **Non-Compliant & Outstanding Medicaid Documentation**

☐ **Supervision**

☐ **Billing Edits**

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

Digital Speech Recommendations

□ County Expectations for **Digital Speech Recommendations**

- Effective **September 1, 2025**, the county is expecting SLPs to use the **Digital Speech Recommendation** feature in the Portal for all Speech enrollments including new children and/or changes in service (*instead of uploading a paper prescription*).
- Effective **September 1, 2025** billing providers will not be able to submit billing to the county for Speech enrollments that do not have a digital speech recommendation.

A webinar training has been scheduled to walk through the **PORTAL Digital Speech Recommendation** process on the following dates: **6/5, 6/6, 7/31, 8/1**.

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

OT/PT/Psychological Counseling Prescriptions

❑ County Expectations for **Hard Copy Prescriptions**:

- The County is expecting providers to upload Prescriptions to the Portal for **ALL** children – **Not just Medicaid children.**
- Agency Billing Admins, Agency Service Providers and Independent Providers will be expected to **review** and **upload** prescriptions for **OT, PT and Psychological Counseling** that cover service dates beginning **September 1, 2025** as well as any new prescriptions (new children/changes in service) for the **2025-26** school year.
- Upcoming webinars on Prescriptions will take place as follows:
 - ✓ **Uploading Prescriptions (5/13/25)** will explain how to upload paper prescriptions (OT/PT) into the Portal.
 - ✓ **Medicaid-Compliant Written Orders (5/15/25)** will explain in detail how to recognize a Medicaid-compliant Written Order.

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

For OT Prescriptions

- ❑ Prior to February 3, 2012 Occupational Therapists were required to have a written order to provide treatment.
- ❑ The amendment to Education Law §7901 on February 3, 2012 states that occupational therapists can perform services without a prescription if the service is ***not specific to “restorative function.”*** However...
- ❑ If the county has contract language for the provider that indicates that the provider must cooperate in the successful processing of Medicaid claims, the county can insist that the provider obtain a written order for **Medicaid** purposes. In the absence of a written order, or until a Medicaid written order is obtained, treatment can occur.

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

For Prescriptions/Digital Recommendations

❑ County Expectations for **Prescriptions** (Continued)

- Effective **May 1, 2025**, Independent Providers, Agencies and Agency service providers will use the prescription templates in the Portal Knowledge Base for **OT, PT** and **Psychological Counseling** Services. (beginning with **9/1/25** service dates)
- You will see two prescription templates in the Portal:
 - 1) A **Multi-Discipline Template**, and
 - 2) An **OT/PT Template**
- The Portal prescription template has space in the heading for customization to include a logo and/or agency information (name/address/phone); ***providing the customization does not cause the prescription to generate a second page.***

PORTAL RX TEMPLATES

Multi-Discipline Template

OT/PT Template

PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

Student Name _____ DOB _____

District _____ County _____

Agency _____
(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

TERM OF SERVICE (REQUIRED)

☐ School Year: 7/1/____ to 6/30/____ -OR- ☐ IEP Dates: _____ to _____

☐ School Session: _____ to _____
(Enter School Year or School Session) (Select One) (Enter IEP Service Dates for Calendar Year IEPs)

****Frequency/Duration adopted "As per IEP" requires a New Order each time the IEP is changed for ALL Services****

Discipline	Frequency	Duration	(I/G)	ICD Code Services	Purpose of Treatment / Services	ICD Code Evaluations
Audiological						
☐ OT ESY						
☐ OT 10-Month						
☐ PT ESY						
☐ PT 10-Month						
☐ Speech ESY						
☐ Speech 10-Month						
Psychological/ Psychological Counseling						
Skilled Nursing (Requires a Physician's Order)						

(Signature of NYS licensed and registered physician, a physician or a licensed nurse practitioner acting within the scope of practice (for psychological counseling services this also includes an appropriate school official and for speech therapy services, a speech-language pathologist who has seen the child.)

Signature _____ Date Signed _____
(Required: Original Signature – Stamps Not Permitted)

(Please Print) Ordering Practitioner's Name/Title/Credentials _____

REQUIRED ORDERING PRACTITIONER INFORMATION (Stamp Accepted)

Address: _____ License # _____

Phone: _____ NPI # _____

Medicaid # _____

Phone # _____

Fax # _____

PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

Student Name _____ DOB _____

District _____ County _____

Agency _____
(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

TERM OF SERVICE (REQUIRED)

☐ School Year: 7/1/____ to 6/30/____ -OR- ☐ IEP Dates: _____ to _____

☐ School Session: _____ to _____
(Enter School Year/Session Dates) (Select One) (Enter IEP Dates for Calendar Year IEPs)

****Frequency/Duration adopted "As per IEP" requires a New Order each time the IEP is changed for ALL Services****

Discipline	Frequency	Duration	(I/G)	ICD Code Services	Purpose of Treatment/Services	ICD Code Evaluations
☐ OT – ESY				Check Code Below		
☐ OT – 10-Month				Check Code Below		
☐ PT – ESY				Check Code Below		
☐ PT – 10-Month				Check Code Below		

Frequently Used OT/PT ICD Codes:

(Check)	ICD Code	Description (Frequency, Duration & Class Ratio as per the IEP)
☐	F82	Coordination Disorder
☐	F84.0	Autism
☐	R62.50	Unspecified lack of expected normal physiological development in childhood
☐	R26.89	Abnormality of Gait: Ataxic, paralytic, spastic, staggering
☐	R27.8	Lack of Coordination: Ataxia, not otherwise specified; muscular incoordination
☐	Other:	

(Signature of NYS licensed and registered physician, a physician or a licensed nurse practitioner acting within the scope of practice (for psychological counseling services this also includes an appropriate school official and for speech therapy services, a speech-language pathologist who has seen the child.)

Signature _____ Date Signed _____
(Required: Original Signature – Stamps Not Permitted)

Ordering Practitioner's Name/Title/Credentials (Please Print) _____

REQUIRED ORDERING PRACTITIONER INFORMATION (Stamp Accepted)

Address: _____ License # _____

Phone: _____ NPI # _____

Medicaid # _____

Phone # _____

Fax # _____

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

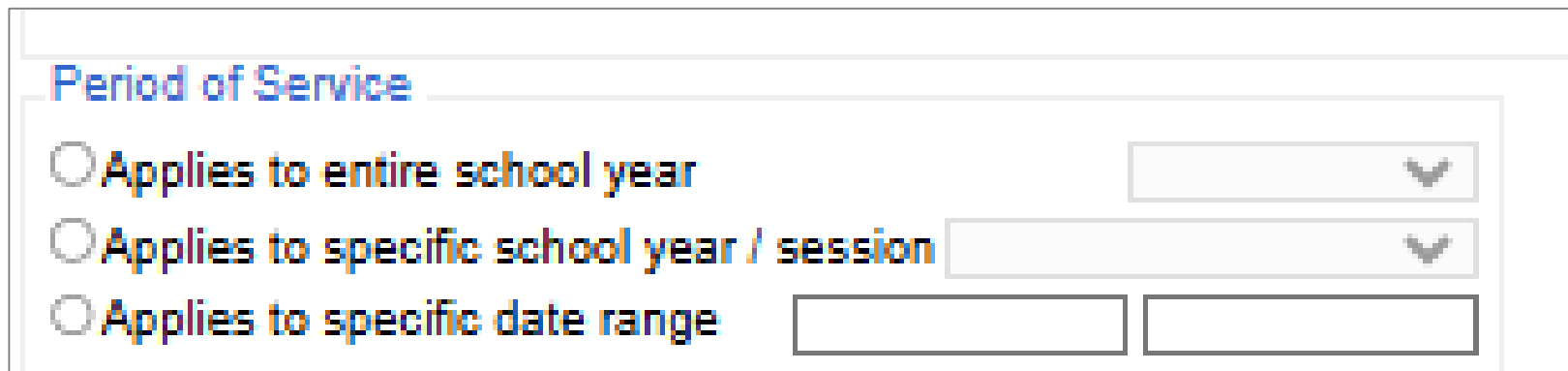
For Prescriptions/Digital Recommendations

☐ Prescription Term of Service Dates

There are three (3) term of service date options when you upload a prescription or create a digital speech recommendation, as shown in the screenshot below.

☐ Term of Service Dates

- The first option is for generic school year dates (7/1 to 6/30). This is the default option and is recommended.
- The second option is for a specific school year session (**Summer or 10-Month**)
- The third option is for “**specific**” dates within the generic school year dates (e.g., 9/5/24 to 6/21/25)



The screenshot shows a web form titled "Period of Service". It contains three radio button options for selecting the term of service dates. The first option is "Applies to entire school year" with a dropdown menu to its right. The second option is "Applies to specific school year / session" with a dropdown menu to its right. The third option is "Applies to specific date range" with two text input fields to its right.

Period of Service

☐ Applies to entire school year

☐ Applies to specific school year / session

☐ Applies to specific date range

WHAT WILL HERKIMER COUNTY EXPECT FROM SLP PROVIDERS?

Digital Speech Recommendations for SLPs

SLPs will be required to...

- ☐ Create a **Digital Speech Recommendation** in the Portal for all children with **9/1/25** service dates (or later – instead of uploading a paper prescription).
- ☐ Create a digital Speech Recommendation in the Portal **in addition to any prescriptions uploaded from community practitioners.**
- ☐ Essentially, the SLP will create a digital recommendation for **ALL speech children.**

WHEN CAN THE SPEECH RECOMMENDATION BE COMPLETED?

(Medicaid Q & A #94)

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

A. No. The SLP cannot write a referral if they have not seen the student. 18 NYCRR 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]

WHAT WILL HERKIMER COUNTY EXPECT FROM SLP PROVIDERS?

OPRA Enrollment for SLPs

- ❑ In order for Medicaid to pay on a claim, the service provider must be enrolled with Medicaid as an Ordering, Prescribing, Referring, Attending (**OPRA**) provider.
- ❑ Herkimer County will be requiring SLPs (who are ordering, prescribing, referring) to be **OPRA** enrolled so the services they provide will be Medicaid reimbursable. There is no cost to enroll.
- ❑ If you are an SLP that is not enrolled in OPRA, the links below will give you helpful information about the enrollment process. McGuinness can also assist you with this process.
 - Helpful OPRA Links: <https://support.cpseportal.com/kb/a628/opra-reference-guide.aspx>
<https://support.cpseportal.com/kb/a627/opra-important-links.aspx>

An upcoming webinar on OPRA will take place as follows:

OPRA (5/8 & 5/9) will explain in detail the OPRA Enrollment and Revalidation Processes. Agencies should attend this webinar.

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Are there any questions about
prescriptions or digital speech
recommendation requirements?

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

Comply With Requests For Non-compliant or Missing Documentation

- ❑ **Non-Compliant Medicaid Prescriptions:** If an uploaded prescription does not meet Medicaid requirements, you will receive an email notification from McGuinness regarding what is required to ensure Medicaid claiming.
- ❑ **Outstanding Prescriptions:** Several times throughout the school year you will be contacted by McGuinness with a request for **missing** prescriptions (that is required for Medicaid claiming).
- ❑ Please respond to these requests as soon as possible to ensure that Medicaid claims are processed within the limited claiming window.

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

Verify Your Credentials (In The Portal)

- ❑ All licensed providers ***must*** have their credentials verified through the CPSE Portal. This process is simply verifying that a therapist's Name, NPI and license number are correct.
- ❑ Billing Providers will only be able to submit attendances for therapists that have verified credentials.
- ❑ A webinar on ***Credential Verification*** is scheduled for ***Monday, May 12, 2025*** – Two Sessions ***9:00 AM and 4:00 PM*** – Only one session is required.
- ❑ All licensed therapists ***must*** have an NPI number to bill through the Portal – even if they work under the direction of a supervising clinician. There is no cost to apply for an NPI number and usually takes 7-10 days. Applicants can use the following links to apply:
 - <https://www.cms.gov/Medicare/CMS-Forms/CMS-Forms/downloads/cms10114.pdf>
 - <https://www.webpt.com/blog/do-i-need-a-new-npi-and-other-npi-questions/>

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

Credential Verification Approvals

- ❑ In addition to the verification of credentials in the Portal the Credential Verification Process ***must be approved*** by McGuinness (on behalf of the County), before billing can be submitted to the County.
- ❑ Therapists that have unverified credentials or have verified credentials that have not been approved by McGuinness will not be able to submit billing through the Portal.
- ❑ If a billing provider receives a billing error indicating that credentials need to be approved, please email the Medicaid mailbox at Medicaid@cpseportal.com requesting credential approval so billing can move forward.

NEW APPROVAL PROCESSES /SCREENS

☐ Signatures Approval

- In order to submit billing to the county the Service Provider's signature must be approved by McGuinness. *(Signatures must include the Name, Signature, Title and Credentials.)*

☐ Service Location Approval

- In order to submit billing to the county the Service Location (Setting & Location) on Session Notes must be approved by McGuinness.

The items above are “new” to the Portal/Medicaid. These new screens and processes have been added to the appropriate Webinars.

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

Submit CBRS Billing At The Same Time As The CB Billing

- ☐ The County is expecting Center-Based Providers to submit the Center-Based Related Service (CBRS) voucher to the county at the same time that the Center-Based (Tuition) voucher is submitted.
- ☐ If the county receives the tuition voucher **without** the CBRS voucher, payment for the tuition voucher will be withheld until the CBRS Voucher has been submitted.
- ☐ New Screen/Report in the Portal: **Billing > Missing CBRS Billing**
This report will show if the provider was paid for a particular month for tuition where the CBRS enrollments do not have “submitted CBRS Sessions.”
- ☐ McGuinness will notify providers who have not submitted CBRS billing.

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

Supervision – (UDO)

- ❑ Certain service providers require supervision (PTAs, OTAs, Speech Teachers, CFYs)
- ❑ Providers will be expected to...
 - Create **Pre-License Plans** in the Portal for CFYs and other Limited Permit holders.
 - Create **Supervision/Enrollment Plans** in the Portal for all Supervision Enrollments.
 - Enter the **Face-to-Face Meeting Date** in the Portal in order to submit billing to the County for all Supervision enrollments.
 - Upload the **UDO audit documentation** (Child Log & Accessibility Form) for each child with a supervised enrollment.

Supervision Webinars: (6/12, 6/13, 8/7, 8/8) will explain in detail how to create a Pre-License Plan, Supervision/Enrollment Plan, how to enter the Face-to-Face Date and upload the Audit Documentation.

WHAT WILL HERKIMER COUNTY EXPECT FROM PROVIDERS?

Supervision – (UDO)

- ☐ Providers will not be able to submit a voucher for supervision enrollments to the County for payment until the...
 - 1) Pre-License/Supervision Plans have been created for all CFYs and/or providers with limited permits,
 - 2) The enrollments and children have been assigned to the Supervision Plan, and
 - 3) The Face-to-Face observation meeting date has been entered into the Portal.

- ☐ Prior to receiving Medicaid Support for Supervision, providers **must attend** the ***Supervision Webinar*** or ***watch*** the recording of the webinar in order to understand how to correct any supervision issues.

Supervision Webinars: (6/12, 6/13, 8/7, 8/8) will explain in detail how to create a Pre-License Plan, Supervision/Enrollment Plan, how to enter the Face-to-Face Date and upload the Audit Documentation. **Billing Admins should attend this training.**

BILLING EDITS

❑ McGuinness has the ability to set certain billing requirements for Full-Service Medicaid Counties (*that may prevent submitting a voucher to the County*). Listed below are some of the billing edits that will be applied for Herkimer County.

- **Credentials** need to be verified by the provider and **approved** by McGuinness
- **Conditional Approvals** will allow the provider to bill while certain items are in process (such as changing your name with SED, waiting for OPRA enrollment, etc.)
- **Signature** and **Service Location** Approvals
- A **Prescription** or **Digital Order** must be uploaded to Medicaid enrollment(s)
- **Supervision**
 - Pre-License and/or Supervision/Enrollment Plan must be entered in the Portal (even for outside vendors)
 - Face-to-Face Date must be entered (to ensure that Medicaid is not billed erroneously for dates of service prior to the first observation meeting).

TO SUMMARIZE

Providers/Agencies will be expected to...

- ☐ **Review** and **upload** Prescriptions or create a digital order for **all** children (*not just Medicaid children*) for service dates beginning **9/1/25**.
- ☐ Use the **McGuinness prescription templates** for all prescriptions (except Speech) beginning **5/1/25** for **9/1/25 billing dates**. Billing providers will not be able to voucher attendances to the county without a prescription for the enrollment.
- ☐ Comply with requests for **non-compliant** and/or **missing** Medicaid documentation.
- ☐ **Verify credentials** in the Portal. Billing providers will not be able to submit billing to the county for non-verified or non-approved providers.
- ☐ Submit **Center-Based Related Services (CBRS) billing** at the same time as the Tuition billing.
- ☐ **Create Supervision/Enrollment Plans & Enter the Face-to-Face Dates** in the Portal for all Medicaid Supervision enrollments (billing requirement).

TO SUMMARIZE

Speech Providers will be expected to...

□ SLP Requirements:

- SLPs are required to be **enrolled in OPRA** (**Ordering, Prescribing, Referring, Attending**) if not already enrolled. *(A webinar to go over OPRA is scheduled for May 8 & 9)*
- SLPs are required to complete a digital speech recommendation in the Portal for **ALL Speech Enrollments** beginning with **9/1/25** service dates. *(A webinar to go over Digital Speech Recommendations is scheduled for June 5 & 6)*
- SLPs are required to complete a digital speech recommendation in the Portal in addition to any prescriptions uploaded to the Portal from medical practices.

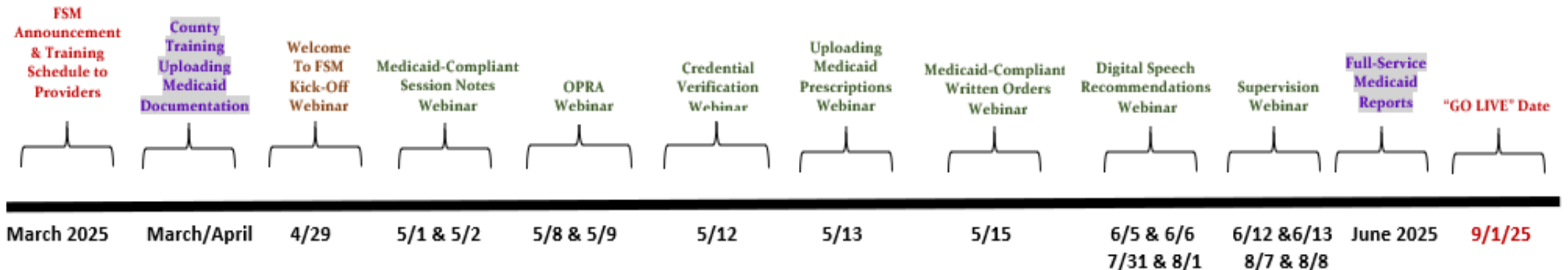
2025 Full-Service Medicaid TIMELINE

Herkimer County

- ❑ 9/1/25 (Service Dates) - Effective Date for Full-Service Medicaid billing w/ McGuinness
- ❑ 5/1/25 – New Prescription Templates for OT/PT/Psychological Counseling beginning with 9/1/25 Service Dates (Discard any previous templates.)
- ❑ 9/1/25 – Digital Speech Recommendations for all Speech Enrollments (instead of hard copy prescriptions)
- ❑ Additional Medicaid Trainings will take place from May through August 2025.

HERKIMER COUNTY FSM TRAINING TIMELINE

HERKIMER COUNTY FULL-SERVICE MEDICAID IMPLEMENTATION TIMELINE



2025 Full-Service Medicaid Training **TIMELINE**

Herkimer County

□ TRAINING (April through August 2025)

1) **5/1 & 5/2 – Medicaid-Compliant Session Notes Training**

This is a very informative Medicaid compliance webinar that everyone should attend.

2) **5/8 & 5/9 – OPRA Presentation**

SLPs and Agencies should attend this webinar.

3) **5/13 – Uploading Prescriptions to the Portal**

4) **5/15 – Medicaid-Compliant Written Orders Training**

This is a very informative Medicaid compliance webinar that everyone should attend.

5) **6/5, 6/6, 7/31 & 8/1 – Digital Speech Recommendation Training – (for SLPs)**

6) **6/12, 6/13, 8/7 & 8/8 – Supervision Training***

**Providers will be expected to attend (or watch) this webinar prior to receiving Portal Support.*

PRIOR TO BILLING...

Herkimer County

Prior to billing...

(**September 2025** – First Medicaid Billing Cycle)

- ☐ Make sure credentials have been ***verified*** and ***approved***,
- ☐ A ***prescription*** or digital speech recommendation has been uploaded/created,
- ☐ ***Supervision Requirements*** have been entered and/or uploaded,
- ☐ ***Credentials, Signatures and Service Locations*** have been approved, and
- ☐ ***Unmatched enrollments*** have been matched.

MEDICAID SUPPORT (Medicaid@CPSEPortal.com)

- ❑ McGuinness should be the ***first point of contact*** for Medicaid Issues; such as...
 - Prescription Questions
 - Medicaid Compliance Questions
 - Medicaid Functions in Portal (such as the Supervision process)
 - Uploading Medicaid documentation (such as prescriptions)
 - Medicaid billing errors (unverified credentials, Rxs, Supervision, etc.)

- ❑ If you need assistance, please contact Medicaid@cpseportal.com. Someone from the McGuinness Medicaid Team will assist you.

- ❑ Feel free to copy the county when you submit your questions/issues. McGuinness will ***Reply to All*** when we reply.

Link to All FSM Follow-up Webinars

Link to all Herkimer County Webinar Postings for all Medicaid Presentations:

<https://support.cpseportal.com/kb/c92/herkimer-full-service-medicaid.aspx>

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QUESTIONS

McGuinness Medicaid-in-Education Contact Information

James McGuinness and Associates, Inc.

1482 Erie Boulevard

Schenectady, NY 12305

Phone: (518) 393-3635

Fax: (518) 393-9938

Deborah Frank, McGuinness Medicaid Specialist – dfrank@jmcguinness.com – Extension #41

Medicaid Support – Medicaid@cpseportal.com

Webinar 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 for **Medicaid Support**: Medicaid@CPSEPortal.com
 - **Questions/Guidance** regarding Medicaid compliance: **Contact Deborah Frank – dfrank@jmcguinness.com, 518-393-3635, Ext. #41**

Provider Follow-up

- ❑ Provider feedback is very important to us.
- ❑ If you would like to share any feedback regarding today's presentation, please email me at dfrank@jmcguinness.com.
- ❑ I want to thank everyone for attending today's webinar. I hope you found the content helpful.