

CPSE Portal Agency Billing – Using the CPSE Portal



Review of Credential Verification

What is Credential Verification?

- * A simple process to verify that the information about a Licensed Professional (OT, PT, SLP, OTA, PTA, LMSW, LCSW, etc.) is correctly entered in CPSE Portal.
- * The individual's information that needs to be verified:
 - * First Name, Last Name & Signature
 - * Profession (OT, PT, SLP,),
 - * License #,
 - * Date of Licensure,
 - * Date Registered Through
 - * NPI #

Credential Verification

- * All providers licensed through the New York State Office of the Professions (Occupational Therapists, Physical Therapists, Licensed Clinical Social Workers, etc.) as well as non-licensed professionals that work under the direction of an SLP for speech therapy services (TSHH, TSSLD, etc.) provider will need to have their credentials verified.
- * Verification means that someone (**the therapist and/or agency staff**) will need to review what is on file with the Office of Professions and the NPI Registry to ensure that the information in the Portal is correct and attest that the information is correct.

Credential Verification by Service Provider

- * A service provider will log into the Portal, and see “REQUIRES VERIFICATION”.
- * They will then need to Verify their credentials.

The screenshot shows the CPSE Portal interface. At the top, the logo 'CPSE PORTAL' is displayed. A greeting 'Hello, Betty . You are currently logged in' is visible in the top right. A navigation bar contains links: Home, Activities, Attendance, Caseload Maintenance, Lookup, Reports, My Account, and Knowledge Base. The main content area is divided into sections: 'User Profile' (with fields for Username: Betty, First Name: Betty, Last Name: Greene, and Email: lmell@jmcguinness.com), 'My Professional Profile' (with Name: Betty Greene and NPI: 1003017674), and 'My License(s)'. The 'My License(s)' section contains a table with columns: Profession, License, Original Date Of Licensure, Registered Through Date, License Lookup, Verification Status, and Verify. The first row shows 'Licensed Speech & Language Pathologist' with License '011587', Original Date '12/23/1999', Registered Through Date '01/31/2020', License Lookup 'Lookup', and Verification Status 'REQUIRES VERIFICATION'. The 'Verify' button in the last column is circled in red. Below the table is the 'My signature' section, showing a signature and the text 'Betty Greene CCC-SLP'. At the bottom, there is an 'Edit My Profile' link.

CPSE PORTAL

Hello, Betty . You are currently logged in

Home Activities Attendance Caseload Maintenance Lookup Reports My Account Knowledge Base

User Profile [Hide](#)

Username: **Betty**
First Name: **Betty**
Last Name: **Greene**
Email: **lmell@jmcguinness.com**
[Edit User Account](#)

My Professional Profile [Hide](#)

Name: **Betty Greene**
NPI: **1003017674 (BETTY GREENE)**

My License(s)

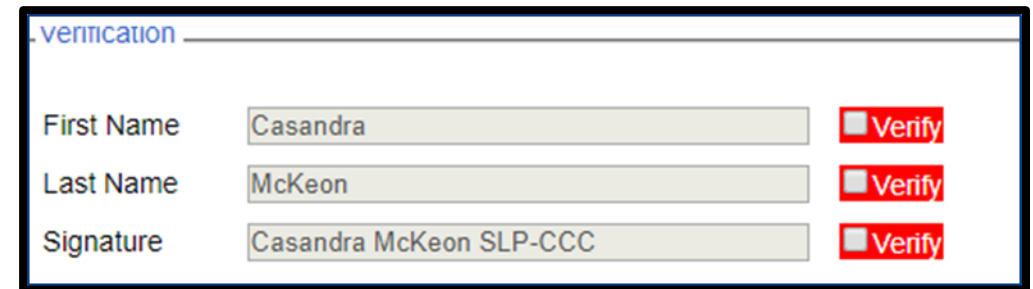
Profession	License	Original Date Of Licensure	Registered Through Date	License Lookup	Verification Status	Verify
Licensed Speech & Language Pathologist	011587	12/23/1999	01/31/2020	Lookup	REQUIRES VERIFICATION	Verify

My signature
Betty Greene CCC-SLP
Betty Greene CCC-SLP
[Edit My Profile](#)

Verifying Name

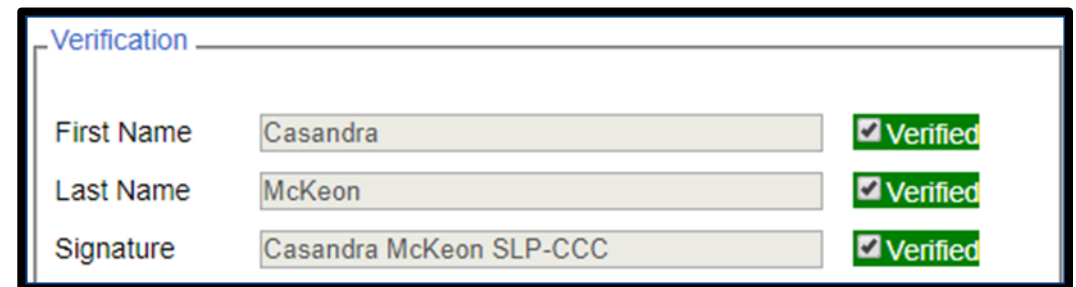
- * Review First Name, if correct click “Verify”
- * Review Last Name, if correct click “Verify”
- * Review Signature, if correct click “Verify”

- * After you click the red “verify” button, the status changes to green and says, verified.”



A screenshot of a web form titled "Verification". It contains three input fields: "First Name" with the value "Casandra", "Last Name" with the value "McKeon", and "Signature" with the value "Casandra McKeon SLP-CCC". To the right of each input field is a red button with the text "Verify".

Verification	
First Name	Casandra <input type="button" value="Verify"/>
Last Name	McKeon <input type="button" value="Verify"/>
Signature	Casandra McKeon SLP-CCC <input type="button" value="Verify"/>



A screenshot of the same "Verification" form after the buttons have been clicked. The buttons are now green and display a checkmark followed by the word "Verified".

Verification	
First Name	Casandra <input checked="" type="button" value="Verified"/>
Last Name	McKeon <input checked="" type="button" value="Verified"/>
Signature	Casandra McKeon SLP-CCC <input checked="" type="button" value="Verified"/>

Verifying License

- * Compare the CPSE Portal information on left to NYS Office of the Professions on the right to verify it is the same person.
- * You can edit/update the License #, date of licensure and registered through date.
- * You can also use the “Update Verification with SED Dates” to fill in those fields.

Credential Verification

Verification

First Name	Stephanie	<input type="checkbox"/> Verify
Last Name	Matos	<input type="checkbox"/> Verify
Signature	Stephanie Matos COTA/L	<input type="checkbox"/> Verify
Profession	Licensed Occupational Therapist Assistant	<input type="checkbox"/> Verify
License No	008670	<input type="button" value="Update"/> <input type="checkbox"/> Verify
Date Of Licensure	6/10/2015	<input type="button" value="Update"/> <input type="checkbox"/> Verify
Registered Through	8/31/2024	<input type="button" value="Update"/> <input type="checkbox"/> Verify
NPI	1275046849	<input type="checkbox"/> Verify

NPPES

[Click here for NPPES website](#)

NPI This NPI is for an

First Name

Last Name

Credentials

License Information From NYSED Office of the Professions

According to data retrieved on: 8/6/2024 10:27:20 AM

Name	O'CONNELL STEPHANIE MARIE
Address	CATSKILL NY
Profession	Occupational Therapy Assistant (064)
License Number	008670
Date Of Licensure	June 10, 2015
Registered through Date	August 31, 2024
Status	REGISTERED


NYSEDOPSearchHandler.ashx 1 / 1 - 100% +

O'CONNELL STEPHANIE MARIE

LICENSEE INFO	ENFORCEMENT ACTIONS
Address	CATSKILL NY
Profession	Licensed Occupational Therapist Assistant, Certified
License Number	008670
Date of Licensure	June 10, 2015
Additional Qualifications	
Status	REGISTERED
Registered through Date	08/24

Credential Verification by Agency Office Staff

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



Filters

County All Counties Provider ACHIEVEMENTS Retrieve

Profession All Professions ☐ Include Previously Verified

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



Creating Vouchers

What is an ESID

- * ESID is the abbreviation for Electronic Service ID number. It is the number that identifies the child and the child's particular enrollment in the Portal.
- * The CPSE Portal gives each County created enrollment a unique identifier called the ESID. This is how we reference enrollments.
- * In order to be in compliance with HIPAA you should reference all preschool children by their ESID #, not their name. If you need to contact the help desk, you should **ALWAYS** reference the child's ESID #, and **NOT** the child's name.

Voucher Terminology

* **Create Voucher:**

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

* **Voucher Info:**

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

* **Voucher Details:**

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

* **Recalculation:**

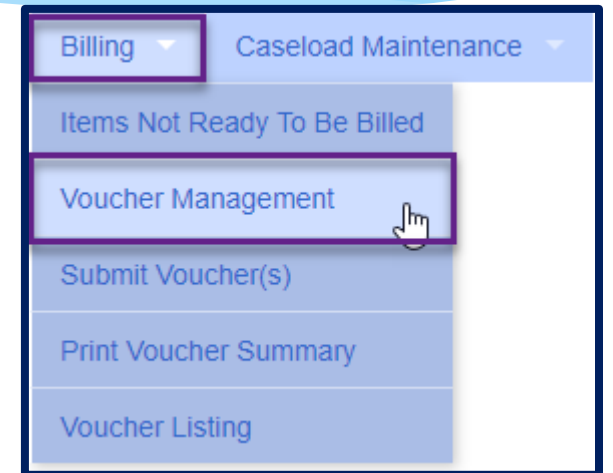
- * This screen introduces a concept known as recalculation of billing items. You can recalculate pending vouchers individually, or all of them at once. The recalculation process determines monthly billing amounts for any enrollments that match the criteria for the voucher contents. These billing items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

Summer Vouchers for Orange County

- * **Center Based (CB)** - Agency will create one voucher at the end of July for July services and bill to the county. Agency will create one voucher at the end of the August services and bill for August.
- * **Center Based Related Services (CBRS)** - Agency will create one voucher at the end of July for July services and bill to the county. Agency will create one voucher at the end of the August services and bill for August.
- * **Related Services (RS fee for services)** - Agency will create one voucher at the end of July for July services and bill to the county. Agency will create one voucher at the end of the August services and bill for August.
- * **SEIT** - Agency will create one voucher at the end of July for July services and bill to the county. Agency will create one voucher at the end of the August services and bill for August.

Creating a Voucher

- * When ready to bill, you will need to create your voucher.
- * Go to **Billing -> Voucher Management**
- * Click “Create Voucher”



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

Creating a Voucher

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

Create/Edit Voucher

Parameters

County Enrollment Type
School Year Session

Info

Creating a Voucher

- * Once you select the previous filters, then the additional options will open up.
- * You can fill in the Service Month From & Service Month to dates. The only notes that will then populate to bill for will be those dates chosen.

Create/Edit Voucher

Parameters

County Enrollment Type School Year Session Related Service Code

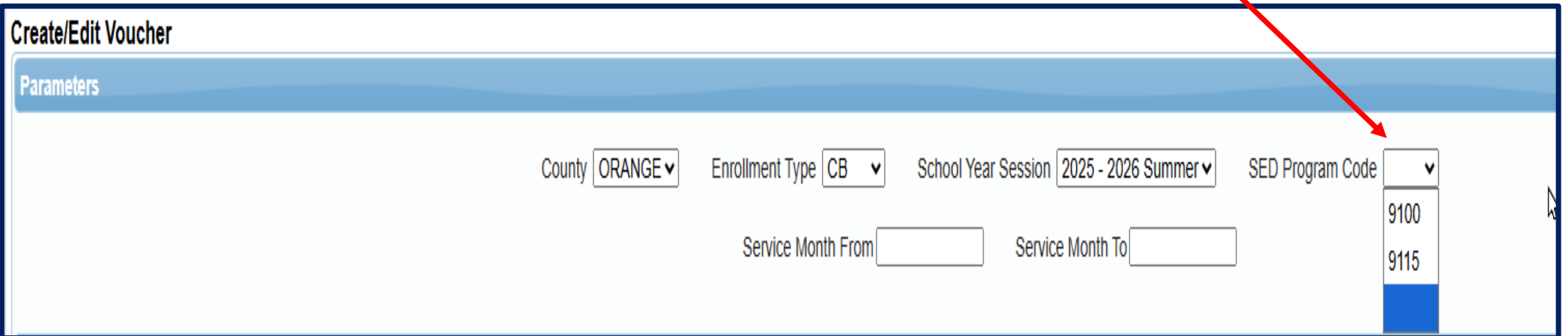
SED Program Code

Service Month From Service Month To

Creating a Voucher

- * **Voucher for CB and SEIT:**

- * **Center Based program (CB)** - students will be grouped together under the SED Program Code that you choose (I.E. – all 9100 students will be billed together). The codes in the dropdown will be codes specific to your agency.
- * **SEIT** – all students receiving SEIT will be grouped together.



The screenshot shows a web form titled "Create/Edit Voucher". Below the title is a "Parameters" section. The form contains several dropdown menus and text input fields. A red arrow points from the text "The codes in the dropdown will be codes specific to your agency." to the "SED Program Code" dropdown menu.

County	Enrollment Type	School Year Session	SED Program Code
ORANGE ▼	CB ▼	2025 - 2026 Summer ▼	▼
			9100
			9115

Service Month From Service Month To

Creating a Voucher

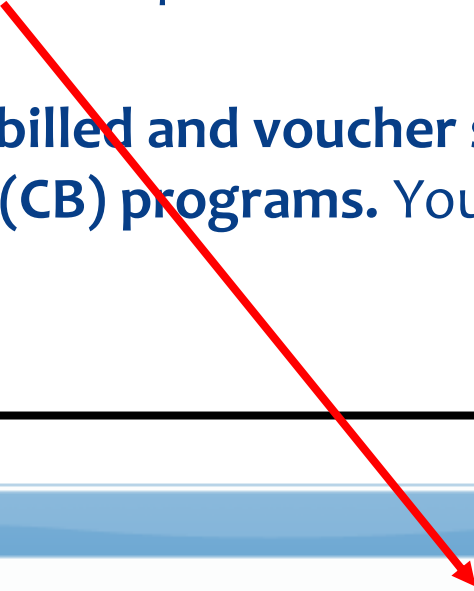
* Voucher for RS or CBRS:

- * **Related Services** – you can bill all related services together by leaving the Related Service Code blank. Orange County requires Related Services to be separated. All ST will be on one voucher, all OT will be on one voucher and so forth.
- * **Center Based Related Services (CBRS) - CBRS **MUST** be billed and voucher submitted to the county at the same time when billing for Center Based (CB) programs.** Your voucher amount for CBRS will be \$0. Separate services same as above.

Create/Edit Voucher

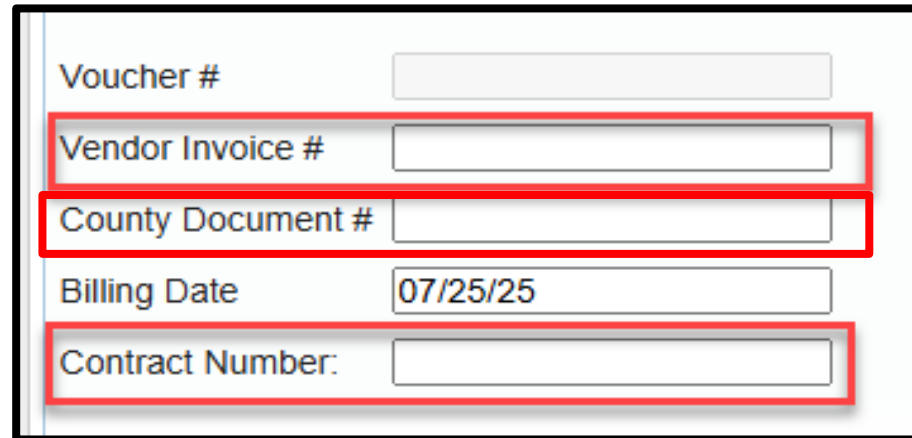
Parameters

County Enrollment Type School Year Session Related Service Code
Service Month From Service Month To SED Program Code



Creating a Voucher

- * Voucher numbers are auto-assigned.
- * Vendor Invoice #: this will be your PS invoice #. You will manually add this #.
- * County Document #: this will be your purchase order #. You will manually add this #.
- * Contract Number: this is your contract # with the county. You will manually add this #.

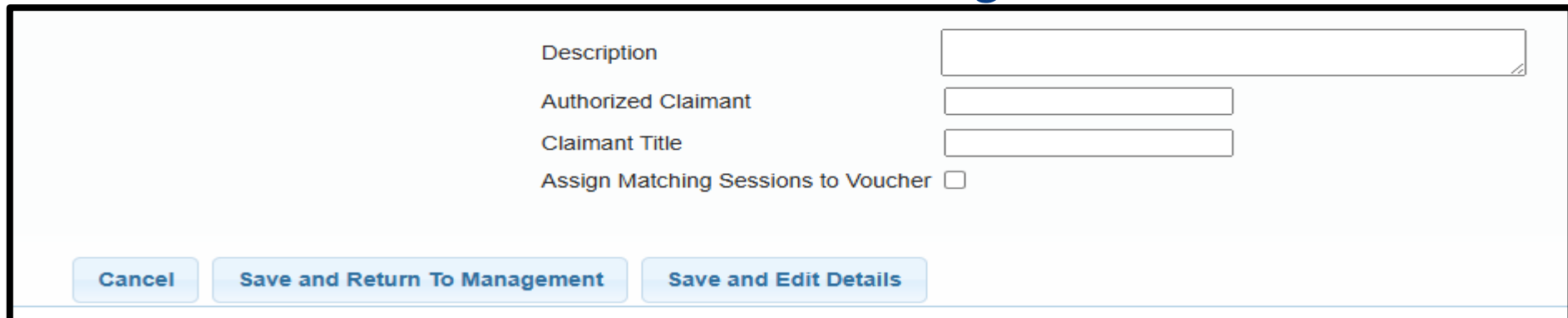


A screenshot of a web form for creating a voucher. The form contains five input fields. The first field, 'Voucher #', is empty. The second field, 'Vendor Invoice #', is empty and highlighted with a red box. The third field, 'County Document #', is empty and highlighted with a red box. The fourth field, 'Billing Date', contains the text '07/25/25'. The fifth field, 'Contract Number:', is empty and highlighted with a red box. The entire form is enclosed in a black border.

Voucher #	<input type="text"/>
Vendor Invoice #	<input type="text"/>
County Document #	<input type="text"/>
Billing Date	07/25/25
Contract Number:	<input type="text"/>

Creating a Voucher

- * The description is how you can identify the voucher (I.E. – May 2021 SEIT).
- * Authorized Claimant –this is the billing admin signing the voucher.
- * Claimant Title – title of claimant (ex. President).
- * If you would like the system to automatically assign matches of the chosen criteria, check “Assign Matching Sessions”.
 - * This can be used in place of choosing each child individually.
- * Click Save and Edit Details or Save and Return To Management.



The screenshot shows a form for creating a voucher. It has four input fields: 'Description' (a large text area), 'Authorized Claimant' (a text box), 'Claimant Title' (a text box), and 'Assign Matching Sessions to Voucher' (a checkbox). At the bottom, there are three buttons: 'Cancel', 'Save and Return To Management', and 'Save and Edit Details'.

Description	<input type="text"/>
Authorized Claimant	<input type="text"/>
Claimant Title	<input type="text"/>
Assign Matching Sessions to Voucher	<input type="checkbox"/>

Creating a Voucher

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

Create/Edit Voucher

Parameters

County Enrollment Type School Year Session SED Program Code

Service Month From Service Month To

Info

Voucher #

Vendor Invoice #

County Document #

Billing Date

Contract Number:

Description

Authorized Claimant

Claimant Title

Assign Matching Sessions to Voucher ☒

Cancel

Save and Return To Management

Save and Edit Details

Creating a Voucher

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



Pending Vouchers

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

Creating a Voucher

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

January 2023

January 2023

Service Code:

Program Code:

Filter

Unassigned

<input type="checkbox"/>	Last Name	First Name	Month	Sessions	Amount	Svc	ESID
<input type="checkbox"/>	BURKE	KARL	January 2023	2	\$0.00 (R)	OT	CBRS2223W0025158
<input type="checkbox"/>	BURKE	KARL	January 2023	1	\$0.00 (R)	ST	CBRS2223W0025207
<input type="checkbox"/>	DELONG	SHAWN	January 2023	1	\$0.00 (R)	ST	CBRS2223W0025104
<input type="checkbox"/>	DELONG	SHAWN	January 2023	1	\$0.00 (R)	OT	CBRS2223W0025212
<input type="checkbox"/>	GUIDRY	MARCUS	January 2023	1	\$0.00 (R)	ST	CBRS2223W0024952
<input type="checkbox"/>	HUTCHINS	DEWAYNE	January 2023	5	\$0.00 (R)	PT	CBRS2223W0024074
<input type="checkbox"/>	MOSELEY	WILLARD	January 2023	1	\$0.00 (R)	ST	CBRS2223W0025098
<input type="checkbox"/>	MOSELEY	WILLARD	January 2023	2	\$0.00 (R)	PT	CPSECBRS0000124228
<input type="checkbox"/>	MOSELEY	WILLARD	January 2023	1	\$0.00 (R)	OT	CPSECBRS0000124229
<input type="checkbox"/>	SAVAGE	LOYD	January 2023	1	\$0.00 (R)	ST	CBRS2223W0024287

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

Assign -->

Assigned

<-- Unassign

Return to Voucher Management

Recalc

Save

View Items Not Ready To Bill

Amount Billed: \$0.00

Creating a Voucher

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

January 2023

Service Code:

Filter

January 2023

Program Code:

Unassigned

Assigned

	Last Name	First Name	Service Month	Sessions	Amount Billed	Svc	ESID
<input checked="" type="checkbox"/>	BURKE	KARL	January 2023	2	\$0.00 (R)	OT	CBRS2223W0025158
<input checked="" type="checkbox"/>	BURKE	KARL	January 2023	1	\$0.00 (R)	ST	CBRS2223W0025207
<input checked="" type="checkbox"/>	DELONG	SHAWN	January 2023	1	\$0.00 (R)	ST	CBRS2223W0025104
<input checked="" type="checkbox"/>	DELONG	SHAWN	January 2023	1	\$0.00 (R)	OT	CBRS2223W0025212
<input checked="" type="checkbox"/>	GUIDRY	MARCUS	January 2023	1	\$0.00 (R)	ST	CBRS2223W0024952
<input checked="" type="checkbox"/>	HUTCHINS	DEWAYNE	January 2023	5	\$0.00 (R)	PT	CBRS2223W0024074
<input checked="" type="checkbox"/>	MOSELEY	WILLARD	January 2023	1	\$0.00 (R)	ST	CBRS2223W0025098
<input checked="" type="checkbox"/>	MOSELEY	WILLARD	January 2023	2	\$0.00 (R)	PT	CPSECBRS0000124228
<input checked="" type="checkbox"/>	MOSELEY	WILLARD	January 2023	1	\$0.00 (R)	OT	CPSECBRS0000124229
<input checked="" type="checkbox"/>	SAVAGE	LOYD	January 2023	1	\$0.00 (R)	ST	CBRS2223W0024287

<-- Unassign

Assign -->

Return to Voucher Management

Recalc

Save

View Items Not Ready To Bill

Amount Billed: \$0.00

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

Creating a Voucher

Voucher Details

Info

Voucher#:

Vendor Invoice#

County Doc #:

Billing Date:

Contract Number:

Description:

Authorized Claimant:

Claimant Title:

[Update](#)

A=Adjustment R=Regular

January 2023 Service Code: [Filter](#)

January 2023 Program Code:

Unassigned

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

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

[Assign -->](#)

Assigned

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

[<-- Unassign](#)

[Return to Voucher Management](#)

[Recalc](#)

[Save](#)

[View Items Not Ready To Bill](#)

Amount Billed: \$0.00

Creating a Voucher

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

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

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

Assign --> <-- Unassign

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

Amount Billed: \$0.00



Missing Attendance

Why Doesn't Attendance Appear on my Voucher?

- * There are several reasons why attendances are not available to be put on a voucher. On the Voucher Details Screen, attendances will not appear on the list of items to put on a voucher for the following reasons:
 - * **The attendance has been added or modified (matched, signed/co-signed) since the voucher was created:**
 - * Try using “Recalc” to have system look for ready attendances.
 - * **The attendance is on an unmatched enrollment (no ESID):**
 - * Match to County Created enrollment and use “Recalc”.
 - * **The attendance is missing a Signed Date or Cosigned Date:**
 - * Have the therapist/supervisor sign or co-sign the attendance.
 - * **The attendance is on another Voucher:**
 - * If the other voucher has not been submitted you can remove it from that voucher.
 - * If the County denied that attendance on that other voucher, submit request to support@CPSEPortal.com to rebill for that ESID and date of service.
 - * **The rates have not yet been uploaded:**
 - * This can be checked by going to **Lookup -> Enrollment Lookup** and Select the School Year Session, County, Provider, and Enrollment Type.
 - * The column on the right that reads "Rates" will show if there is anything there other than \$0.
- * You should continually be reviewing your Items Not Ready To Be Billed report.

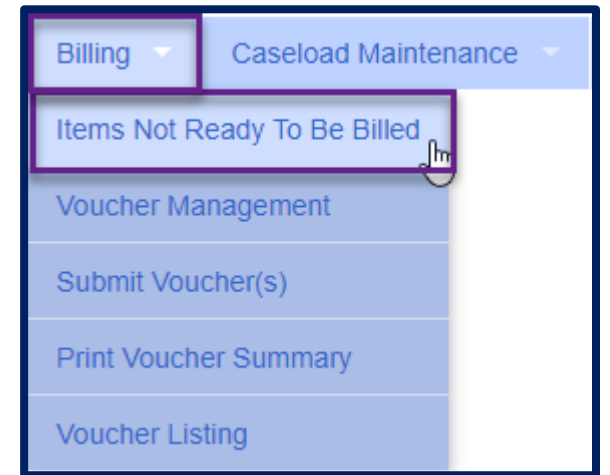
Items Not Ready to Bill

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

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

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

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



Items Not Ready to Bill

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

Items Not Ready To be Billed
Filters
Provider: County: *
School Year Session: Service Month From: Service Month To:
Enrollment Type: Service Type: Program Code:

Items Not Ready to Bill

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

Items Not Ready To be Billed

Filters

Provider: County:

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

Enrollment Type: Service Type: Program Code:

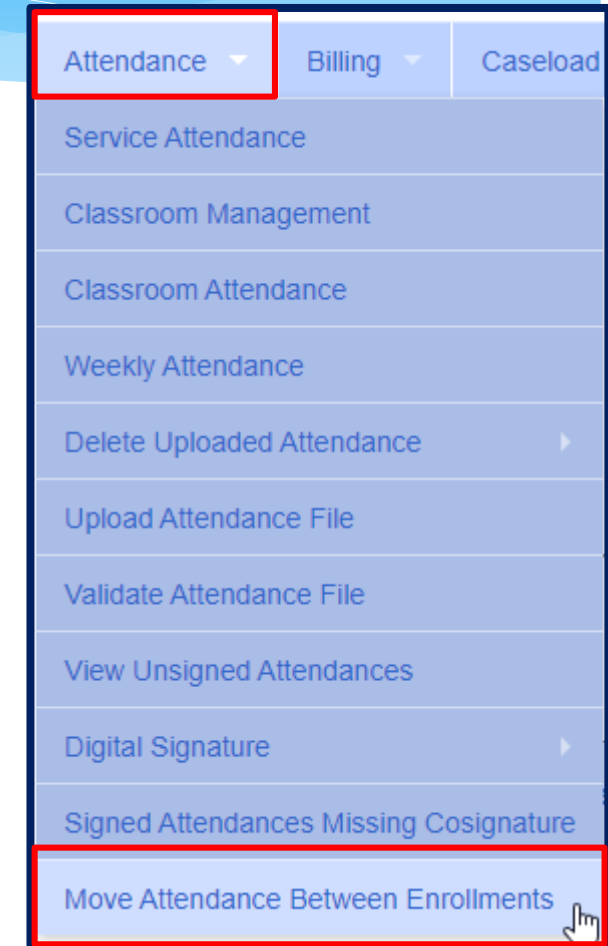
Last Name	First Name	Service Provider	DOB	ESID	From	To	Month	Service Dates	Problem	Service Type	Frequency	Sessions	Amount	
BOLTON	BENNETT	AVERY, NAOMA	01/03/18		12/21/22	06/22/23	Jan 2023	1/4, 1/11, 1/18, 1/25	Unmatched Child	ST (Indv)	1x30	4.00		Attendances
BOLTON	BENNETT	AVERY, NAOMA	01/03/18		12/21/22	06/22/23	Feb 2023	2/1, 2/8, 2/15	Unmatched Child	ST (Indv)	1x30	3.00		Attendances
CONLEY	LEILANI	COLON, KERRI	07/21/18	RS2223W0017826	10/31/22	06/23/23	Feb 2023	2/1, 2/3, 2/10	Not Co-signed	OT (Indv)	2x30	3.00	\$165.00	Attendances
LIGHT	MARYJANE	GRIFFITH, WHITNEY	12/14/19	RS2223W0018102	01/10/23	06/23/23	Feb 2023	2/3, 2/8	Not Co-signed	OT (Indv)	2x30	2.00	\$110.00	Attendances
LIGHT	MARYJANE	GRIFFITH, WHITNEY	12/14/19	RS2223W0018102	01/10/23	06/23/23	Feb 2023	2/15	Not signed	OT (Indv)	2x30	1.00	\$55.00	Attendances



Move Attendance Between Enrollments

Move Attendance Between Enrollments

- * If attendances have been entered on the wrong enrollment, then they can be moved from one enrollment to another without the service provider having to recreate the attendances.
- * In order to move the attendances, they **cannot** be on a voucher.
- * Go to **Attendance -> Move Attendances Between Enrollments**.



Move Attendance Between Enrollments

- * Filter the School Year, Provider & Last Name of the child.
- * This will pull up all enrollments for the child for the school year chosen.

Move Attendance Between Enrollments

School Year Session Provider Last Name

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

Move Attendance Between Enrollments

- * Select Enrollment by clicking “Select” to the Right.
 - * Check correct attendances boxes on left,
 - * Click on “Select” on right for applicable enrollment,
 - * Click on “Move” to move attendance to the other enrollment,
 - * You will the confirmation: *Attendances Moved Successfully*.
 - * Dates in **red** are dates that are outside of the enrollment dates, and need to be moved.

Move Attendance Between Enrollments

School Year Session: 2024 - 2025 Winter Provider: Last Name: Search

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
2024 - 2025 Winter	DUTCHESS	Red Hook		CB2425W001			CB	9/4/2024	6/20/2025		5 hrs/day		Select
2024 - 2025 Winter	DUTCHESS	Red Hook		CBRS2425W001			CBRS	9/4/2024	6/20/2025	OT	2x30	I	Select
2024 - 2025 Winter	DUTCHESS	Red Hook		CBRS2425W002			CBRS	9/4/2024	2/20/2025	PT	1x30	I	Select
2024 - 2025 Winter	DUTCHESS	Red Hook		CBRS2425W003			CBRS	9/4/2024	6/20/2025	PNT	4x30 TOTAL	I	Select
2024 - 2025 Winter	DUTCHESS	Red Hook		CBRS2425W004			CBRS	9/4/2024	6/20/2025	ST	2x30	I	Select
2024 - 2025 Winter	DUTCHESS	Red Hook	Wraparound Services of the Hudson Valley	CBRS2425W005			CBRS	2/20/2025	6/20/2025	PT	2x30	I	Select

Selected Enrollment Info

	Service Date	Service Provider	Individual Or Group
<input type="checkbox"/>	2/3/2025	J	I
<input type="checkbox"/>	2/12/2025	J	I
<input type="checkbox"/>	2/21/2025	C	I

	County	District	ESID	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group
Select	DUTCHESS	Red Hook	CBRS2425W001	CBRS	2/20/2025	6/20/2025	PT	2x30	I

Move

Move Attendance Between Enrollments

- * In the below example, the attendances are on the wrong enrollment. They need to be moved over to the CBRS enrollment.
- * Pay attention to the enrollment start/end dates.

Move Attendance Between Enrollments

School Year Session

2021 - 2022 Winter

Provider

Last Name

Search

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

Selected Enrollment Info

Service Date	Service Provider	Individual Or Group
<input type="checkbox"/> 1/5/2022		I
<input type="checkbox"/> 1/6/2022		I
<input type="checkbox"/> 1/11/2022		I
<input type="checkbox"/> 1/19/2022		I
<input type="checkbox"/> 1/20/2022		I
<input type="checkbox"/> 1/24/2022		I
<input type="checkbox"/> 1/25/2022		I
<input type="checkbox"/> 1/26/2022		I
<input type="checkbox"/> 1/27/2022		I
<input type="checkbox"/> 3/2/2022		I
<input type="checkbox"/> 3/3/2022		I
<input type="checkbox"/> 3/4/2022		I

Move

Select	County	District	ESID	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group
Select	ULSTER	KINGSTON CITY SD	CBRS2122W0035918	CBRS	9/8/2021	12/17/2021	PT	3x30	I
Select	ULSTER	KINGSTON CITY SD	CBRS2122W0036248	CBRS	12/18/2021	6/23/2022	PT	3x30	I



Submitting Vouchers

Submitting a Voucher

- * To submit voucher(s) to county, go to **Billing** -> **Submit Voucher(s)**.
- * Select unbilled voucher by checking box (or Select All).



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

ULSTER CB

Select any Unbilled Vouchers

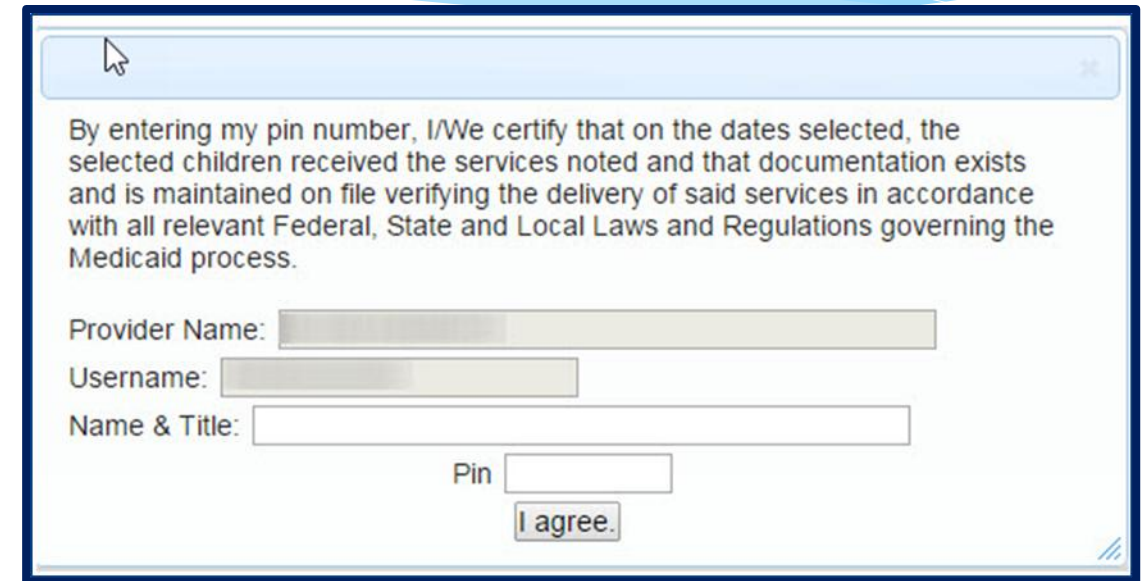
Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed	
<input checked="" type="checkbox"/>	1/11/2022	CB220111104807							18	\$52,452.00	

☒ Select All Total Billed: \$52,452.00

Submit Voucher(s)

Submitting a Voucher


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

A screenshot of a web application window showing a confirmation screen. At the top, a mouse cursor points to a close button. Below is a paragraph of text: "By entering my pin number, I/We certify that on the dates selected, the selected children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process." Below this text are four input fields: "Provider Name:" (a wide text box), "Username:" (a text box), "Name & Title:" (a wide text box), and "Pin" (a small text box). Below the "Pin" box is a button labeled "I agree.". In the bottom right corner, there is a small icon of a printer.

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

Voucher Summary

- * Sign the voucher summary, and send to County .



Voucher Summary

Printed: 6/21/2022 8:39:56 AM

Page 1 of 1

Provider: _____

Vendor#: _____

Tax ID: _____

BEDS Code: 620600998101

Voucher Description: _____

Bill Date: 1/18/2022

Submitted : _____

Time Period: December 2021

County: ULSTER

CPSE Voucher#: CB220118152217

Vendor Invoice#: _____

County Doc#: _____

Contract Or Account#: _____

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


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

Authorized Signature: _____

Certification: _____

Voucher Summary

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



PORTAL

Classroom Attendance

Printed: 6/21/2022 8:39:58 AM

Page 1 of 1

Provider: _____

County: ULSTER

Classroom: _____ **Month:** December 2021


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

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

Signature: _____

Center Based Related Service - CBRS Voucher

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



Voucher Summary

Printed: 6/21/2022 9:02:04 AM

Page 1 of 1

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

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

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

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

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

Authorized Signature: _____**Certification:** _____

Information to Send to County

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



Cannot Submit Voucher

Problems on Voucher

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

Submit voucher(s) for SCHENECTADY county (unbilled CBRS vouchers).


SCHENECTADY ▾ CBRS ▾

Select any Unbilled Vouchers

Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed	
<input type="checkbox"/>	7/25/2025	CBRS250725131829				CBRS Jan 2023	Kelly Knowles	Billing Admin	10	\$0.00	Problems on Voucher View Problems

☒ Select All **Total Billed:** \$0.00

[Submit Voucher\(s\)](#)



Problems on Voucher – View Problems

- * Review the problem under the Problem tab.
- * Click on the attendances to see who the provider is. The attendances with an issue will be in red writing.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	Attendances
E	KARL	CBRS2223W0025158	10/11/2022	6/22/2023	OT (Indv)	2x30	Non-verified license exists	Attendances
E	KARL	CBRS2223W0025207	12/15/2022	6/22/2023	ST (Indv)	1x30	Non-verified license exists	Attendances
D	SHAWN	CBRS2223W0025104	9/7/2022	6/22/2023	ST (Indv)	2x30	Non-verified license exists	Attendances
D	SHAWN	CBRS2223W0025212	12/13/2022	6/22/2023	OT (Indv)	2x30	Non-verified license exists	Attendances
C	MARCUS	CBRS2223W0024952	9/7/2022	6/22/2023	ST (Indv)	3x30	Non-verified license exists	Attendances
H	DEWAYNE	CBRS2223W0024074	9/7/2022	6/22/2023	PT (Indv)	2x30	Non-verified license exists	Attendances
M	WILLARD	CBRS2223W0025098	9/7/2022	6/22/2023	ST (Indv)	2x30	Non-verified license exists	Attendances
M	WILLARD	CPSECBRS0000124228	1/5/2023	6/22/2023	PT (Indv)	2x30	Non-verified license exists	Attendances
M	WILLARD	CPSECBRS0000124229	1/5/2023	6/22/2023	OT (Indv)	2x30	Non-verified license exists	Attendances
S	LOYD	CBRS2223W0024287	9/7/2022	6/22/2023	ST (Indv)	3x30	Non-verified license exists	Attendances

Service Date	Type	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	Treatment Log
10/17/22	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30	JOANNA BARKER	Therapy Room	I	10/17/22	10/26/22	CBRS221202095313	Treatment Log
10/31/22	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30	DOVIE ROUSE	Universal Pre-K	I	10/31/22	10/31/22	CBRS221202095313	Treatment Log
11/10/22	Provided Treatment Session			1:30 PM	2:00 PM	30	1.00	30	JOANNA BARKER	Therapy Room	I	11/10/22	11/11/22	CBRS230111105534	Treatment Log
11/21/22	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30	JOANNA BARKER	Preschool	I	11/21/22	12/02/22	CBRS230111105534	Treatment Log
12/01/22	Provided Treatment Session			11:30 AM	12:00 PM	30	1.00	30	JOANNA BARKER	Preschool	I	12/01/22	12/02/22	CBRS230123154221	Treatment Log
01/18/23	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30	JOANNA BARKER	Therapy Room	I	01/18/23	02/02/23	CBRS250725131829	Treatment Log
01/30/23	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30	JOANNA BARKER	Teletherapy	I	02/01/23	02/02/23	CBRS250725131829	Treatment Log
02/01/23	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30	JOANNA BARKER	Teletherapy	I	02/01/23	02/16/23		Treatment Log Details

Problems on Voucher – View Problems

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		CBR2324W0	9/7/2023	6/21/2024	ST (Indv)	3x30	Missing Service Location	Attendances
		CBR2324W0	3/4/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97110	Attendances
		CBR2324W0	3/4/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97112	Attendances
		CBR2324W0	3/4/2024	6/21/2024	PT (Indv)	2x30	Invalid CPT Code Units: 0 for code: 97116	Attendances
		CBR2324W0	9/7/2023	10/19/2023	PT (Indv)	3x30	Duplicate CPT Codes for Attendance	Attendances
		CBR2324W0	2/12/2024	6/21/2024	PT (Indv)	2x45	Invalid CPT Code Units: 0 for code: 97116	Attendances
		CBR2324W0	2/12/2024	6/21/2024	PT (Indv)	2x45	Invalid CPT Code Units: 0 for code: 97530	Attendances
		CBR2324W0	9/7/2023	6/21/2024	PT (Indv)	2x30	Duplicate CPT Codes for Attendance	Attendances

Problems on Voucher – Attendance Issue

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

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

Treatment Log

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

CPSE PORTAL				Treatment Log																											
Child Name			DOB		Billing Provider		NPI																								
			09/22/19																												
Service	Individual/Group	IEP From	IEP To	District		County																									
Speech Therapy	Individual	09/07/23	06/21/24	ELMONT UFSD		NASSAU																									
Frequency	ESID			Rendering Provider		License	NPI																								
3x30	CBRS2324WC																														
Date Of Service	Time In	Time Out	Duration	# in Group	Supervising Provider (UDO/USO)		License																								
11/01/23	11:00 AM	11:30 AM	30																												
Setting	Location			Referring Provider		NPI																									
Therapy Room																															
CPT	Units	Minutes	Description		ICD	Description																									
92507	1		TREATMENT OF SPEECH, LANGUAGE, VOICE,		F80.2	Mixed receptive-expressive language disorder																									
Session Notes: Activity Related to IEP Goals (including objectives and measures of success) and response(s) of child [caterpillar preposition activity]:Identified preposition in 2/4 opportunities (in, out, on) given moderate verbal cues . [food basket]Verbally requested I want+ food, open, close given moderate visual, verbal cues. Answered yes/no questions given visual and verbal cues with yes/no chart about the therapy room.																															
<table border="1"> <thead> <tr> <th></th> <th>Name, Title and Credentials</th> <th>NPI</th> <th>License</th> <th>Date Signed</th> <th>Signature Method</th> </tr> </thead> <tbody> <tr> <td>Rendering Provider</td> <td></td> <td></td> <td></td> <td>11/03/23</td> <td>DIGITAL</td> </tr> <tr> <td>UDO/USO Supervisor</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>QA Review</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>									Name, Title and Credentials	NPI	License	Date Signed	Signature Method	Rendering Provider				11/03/23	DIGITAL	UDO/USO Supervisor						QA Review					
	Name, Title and Credentials	NPI	License	Date Signed	Signature Method																										
Rendering Provider				11/03/23	DIGITAL																										
UDO/USO Supervisor																															
QA Review																															

Other Possible Problems

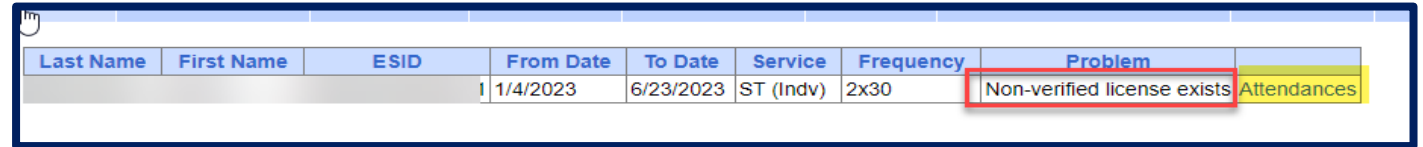
- * When submitting the voucher, you may have problems listed below:
 - * **Invalid CPT Code Units** – you cannot have zero units for a CPT code.
 - * **Duplicate CPT Codes for Attendance** – you cannot have duplicate CPT codes. You can have multiple codes with a specific number of units.

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

Other Possible Problems

* Non-verified License Exists:

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

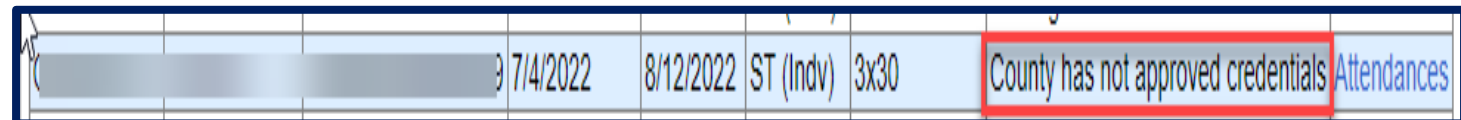


A screenshot of a table with columns: Last Name, First Name, ESID, From Date, To Date, Service, Frequency, Problem, and Attendances. The 'Problem' column for the first row contains the text 'Non-verified license exists', which is highlighted with a red rectangular box. The 'Attendances' column for the same row is highlighted in yellow.

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

* County Has Not Approved Credentials:

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



A screenshot of a table with columns: Last Name, First Name, ESID, From Date, To Date, Service, Frequency, Problem, and Attendances. The 'Problem' column for the first row contains the text 'County has not approved credentials', which is highlighted with a red rectangular box. The 'Attendances' column for the same row is highlighted in blue.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	Attendances
			7/4/2022	8/12/2022	ST (Indv)	3x30	County has not approved credentials	

Missing Prescriptions

- * When submitting the voucher, you may have a problem of:
 - * Details of Prescription/order not entered for enrollment – ***You will need to upload the prescription, enter information and attach the enrollments to the prescription.***

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
			2/17/2023	6/23/2023	ST (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances
			2/17/2023	6/23/2023	OT (Indv)	1x30	Details of Prescription/order not entered for enrollment	Attendances
			2/21/2023	6/23/2023	PT (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances



Problem of “Not Co-Signed”

Problem of “Not Co-Signed”

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



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

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

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

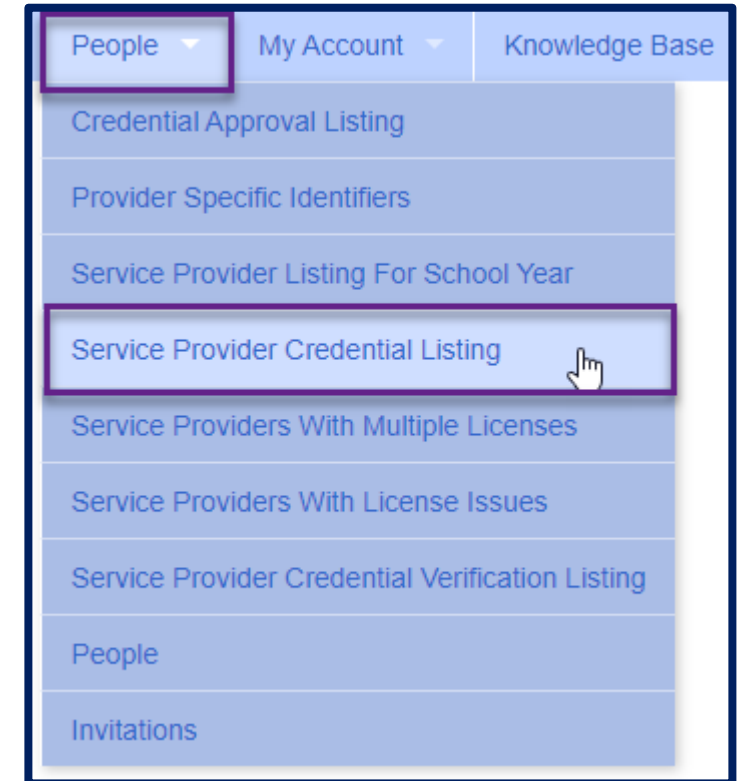
Problem of “Not Co-Signed”

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

Problem of “Not Co-Signed”

Step 1

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



Problem of “Not Co-Signed”

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


Service Providers Listing with Credentials

Filters

County Provider

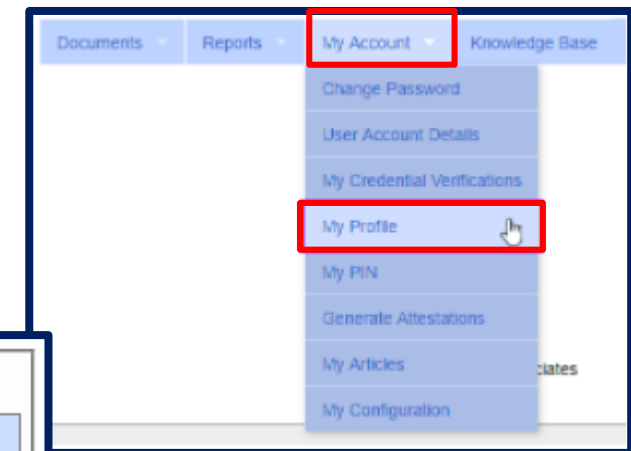
Active on:

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



Problem of “Not Co-Signed”

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



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

Add

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

Problem of “Not Co-Signed”

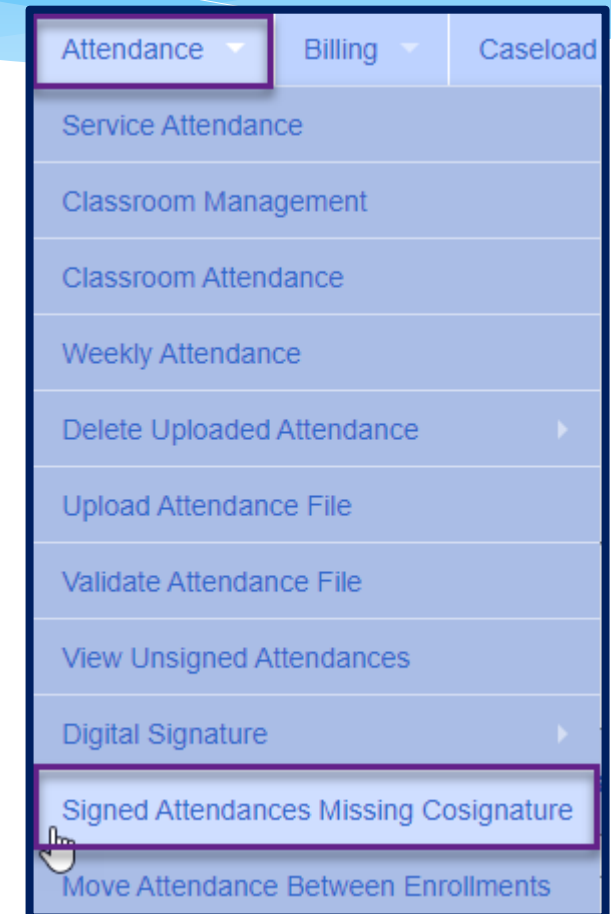
Step 2

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

Problem of “Not Co-Signed”

Step 3

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



Problem of “Not Co-Signed”

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

Signed Attendances Missing Cosignature												
Filters												
School Year 2021 - 2022 Retrieve												
Provider	Last Name	First Name	ESID	Service Date	Service	Therapist Last Name	Therapist First Name	Meets Medicaid Requirements	Can Person Sign	ReCheck	Credentials	Attendance Correction
			CBRS2122W00	05/04/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/05/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/11/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/12/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/18/2022	ST 3x30 Individual			No	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/19/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/26/2022	ST 3x30 Individual			Yes	True	ReCheck	View Credentials	Edit
			CBRS2122W00	05/31/2022	ST 3x30 Individual			No	True	ReCheck	View Credentials	Edit

NOTE:

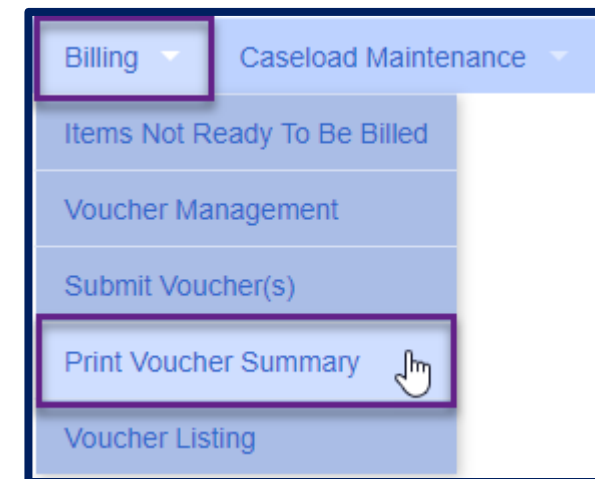
- * If the credentials were not changed, and the problem was pointing to the Credential Verification; simply complete the credential verification as noted in Step 2.
- * Not all counties require the electronic credential verifications.



Print Voucher Summary

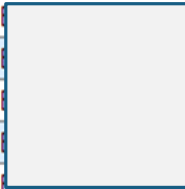

Print Voucher Summary

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




Print Voucher Summary

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

Home	File Transfer ▾	Activities ▾	Attendance ▾	Billing ▾	Caseload Maintenance ▾	Lookup ▾	Documents ▾	Reports ▾	Medicaid ▾	People ▾	My Account ▾	Knowledge Base
Print Voucher Summary Reports												
Filter By... School Year Session: (All School Year Sessions) ▾ Enrollment Type: (All Enrollment Types) ▾ County: (All Billed Counties) ▾ Billing Month: (All Billing Months) ▾ Service Month: (All Service Months) ▾ Voucher Status: (Any Voucher Status) ▾ Apply Filter												
Voucher #	Enrollment Type	Description	Billing Date	Total Billed	Submitted Date	Claimant Title	Authorized Claimant	Destination County	# Enrollments	Print All Voucher Submission Reports		
RS200308133551	RS	FEB. 2020	3/8/2020	\$4,261.50	3/8/2020	CCC-SLP		SCHENECTADY	22	Print		
RS200308133622	RS	FEBRUARY 2020	3/8/2020	\$2,926.00	3/8/2020	CCC-SLP		Albany	11	 Print		
RS200213143706	RS	JAN. 2020	2/13/2020	\$3,993.00	2/14/2020	CCC-SLP		Albany	10	Print		
RS200205073831	RS	JAN. 2020	2/5/2020	\$5,620.50	2/9/2020	CCC-SLP		SCHENECTADY	22	Print		
RS200102193725	RS	DEC. 2019	1/2/2020	\$2,486.00	1/4/2020	CCC-SLP		Albany	9	Print		

Print Voucher Summary

- * You will then see voucher summary:

**PORTAL**

Voucher Summary

Printed: 6/17/2021 2:13:30 PM

Page 1 of 1

Provider:

County: SCHENECTADY

Vendor#: 02061

Bill Date: 8/4/2019

CPSE Voucher#: RS190804113625

Tax ID:

Submitted : 8/19/19 04:09 PM

Vendor Invoice#:

BEDS Code:

Time Period: 2019 - 2020 Summer

County Doc#:

Voucher Description: July 2019

Contract Or Account#:

Child Name	ESID	Frequency	Service	Dates Of Service	Rate	Units	Minutes Per Unit	Amount
HARRIS, RUBEN	RS1920S0014606	2x30 - I	RS - ST	Jul 2019 - 3, 16, 18, 23, 25, 30	\$51.50	6.00	30	\$309.00
WINTERS, LEANORA	RS1920S0014666	2x30 - I	RS - ST	Jul 2019 - 2, 16, 18, 25, 30	\$51.50	5.00	30	\$257.50
WOLFF, JOSUE	RS1920S0014564	1x30 - G	RS - ST1	Jul 2019 - 2, 18, 25	\$51.50	3.00	30	\$154.50
WOLFF, JOSUE	RS1920S0014563	1x30 - I	RS - ST	Jul 2019 - 3, 16, 24, 30	\$51.50	4.00	30	\$206.00
Grand Total:								\$927.00

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

Authorized Signature: _____ **Certification:** _____

Print Voucher Summary

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



- * **NOTES:**

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



Attendance Denied by County?

How to Correct and Re-Bill

- * You **MUST** confirm that the attendances have been denied by the county, and that you understand the removal is permanent.
- * If a provider makes a mistake and submits the erroneous data on a voucher, the County may choose to deny payment for certain dates of service.
- * If this occurs, and the provider would like to attempt to correct the data and resubmit on a new voucher, the process is as follows:
 - * The denied attendance needs to be removed from the initial voucher. To do this, you must inform the CPSE Portal support team of the ESID and service dates that you would like removed. To do this, complete the below form and email it to **support@cpseportal.com**
 - * **RequestToHaveAttendanceRemovedFromSubmittedVouchers.xlsx**

How to Correct and Re-Bill

* Example of form:

	A	B	C	D	E	F
1	<i>Complete the form below to request attendance entries to be removed from vouchers so they can</i>					
2	<i>be corrected and rebilled on a new voucher</i>					
3						
4	County					
5	Billing Provider Name					
6						
	Electronid Service ID (ESID)	Date of Service				
7	(*Child's, not Voucher #*)	(Date Needing to be Removed)				
8						
9						
10						
11						
12						

IMG1: Example of form to be completed

How to Correct and Re-Bill

- * Once the attendance is no longer on a voucher:
 - * If you need to modify the treatment log:
 - * Since the attendance has already been digitally signed attesting to the fact that everything was reviewed and correct, you must first unsign the attendance and indicate why you need to modify the signed treatment log. Here are instructions for unsigning attendance: <http://support.cpseportal.com/kb/a33/unsigned-attendance.aspx>
 - * Once the attendance entry has been unsigned, it can now be modified.
 - * The modified attendance entry needs to be **resigned**.
 - * If the attendance needs to be moved to a different ESID because the original enrollment dates changed, was rescinded or attendance was entered on the wrong enrollment, here are the instructions:
 - * <http://support.cpseportal.com/kb/a53/move-attendance-between-enrollments.aspx>
 - * The attendance can be added to a new voucher and submitted. If the attendance is not appearing, make sure you do a “**recalc**” on the voucher.



Verifying CB Dates and Entering Provider Sites

Verifying CB Dates For eSTACs

- * If your county uses eSTACs, each year someone from your agency will need to verify your CB dates. **This is important!!**
- * When districts are choosing programs for the following year, the program dates need to match the IEPs.
- * You will go to **eSTACs -> Maintenance -> Verify CB Program Dates**.
 - * Check to ensure that your program dates match SED.
 - * If your eSTAC program dates are wrong, then update them.
 - * If your program dates are wrong with SED, then contact SED.
- * You will receive a reminder from the county each year with instructions.

Verifying CB Dates For eSTACs

Verify CB Program Dates

Filters

County Provider School Year Session

eSTAC Dates

Provider	Program Description	SED Code	Hours Per Day	From Date	To Date	SED From Date	SED To Date	Verified By	Verified Date		
A STARTING PLACE	S/Y PRESCHOOL-SPECIAL CLASS 5 HRS	9100-J	5.00	9/7/2022	6/23/2023	9/7/2022	6/23/2023	ks439765	6/1/2022	Edit	Verify Dates
A STARTING PLACE	S/Y-PRESCHOOL-SPECIAL CLASS 2.5 HRS	9115-I	2.50	9/7/2022	6/23/2023	9/7/2022	6/23/2023	ks439765	6/1/2022	Edit	Verify Dates
A STARTING PLACE	S/Y-PRESCHOOL-INTGRD SPEC CLASS 5 HRS	9160-I	5.00	9/7/2022	6/23/2023	9/7/2022	6/23/2023			Edit	Verify Dates
A STARTING PLACE	S/Y-PRESCHOOL-INTGRD SPEC CLASS 2.5	9165-I	2.50	9/7/2022	6/23/2023	9/7/2022	6/23/2023	ks439765	6/1/2022	Edit	Verify Dates

Provider Sites

- * Any agency with a program will need to enter the physical address of their program(s).
- * This can be done one of two ways.
 - * **eSTACs -> Maintenance -> Provider Sites**, or
 - * **My Account -> Provider Sites**.
- * Below, you can see that this agency only has one provider site.

Provider Sites

Filters

Provider:* Wraparound Services of the Hudson Valley ▼

Retrieve

Name	Address	City	State	ZIP	
Wraparound Services of the Hudson Valley	250 Tuytenbridge Road	Lake Katrine	NY	12449	Edit Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	NY <input type="text"/>	<input type="text"/>	Add



Signature and Location Approvals

Signature Approvals

- * All Full Service Medicaid counties will need to have signatures of therapists approved. This includes therapists that use the Portal or bill from an outside source.
 - * Once the therapists signature is approved, it will not need to be approved again unless there is a change.
 - * To see who needs approval, or who has been invalidated, go to **People -> Signature Approval Listing**, and use filters.
- * Below is a screen shot showing that the therapists were missing their credentials on their attendance signatures.
- * Any questions, contact Medicaid@CPSEPortal.com.

Signature Approvals

Filters

County

NASSAU

 Provider

NEW PROVIDICES

☒ Include Invalid Signatures

☐ Include Approved Signatures

Retrieve

Provider	Last Name	First Name	CPSE Signature	Attendance Signature	Approved	Invalidated	Invalid Reason
NEW PROVIDICES	Adams	A	CCC-SLP	, , 020762, 1750689584	A	03/17/25	Missing Credential / Title
NEW PROVIDICES	MAN, DPT	L	MAN, DPT	RNOLD-LIEBMAN, , 029492, 1366684623	L	12/23/24	Missing Credential / Title
NEW PROVIDICES	CCC-SLP TSSLD	E	CCC-SLP TSSLD	, , 025594, 1811351224	E	12/23/24	Missing Credential / Title
NEW PROVIDICES	OTD, OTR/L	A	OTD, OTR/L	ERSEN, , 024444, 1245709492	A	12/23/24	Missing Credential / Title
NEW PROVIDICES	BERNSTEIN	M	IA SLP	STEIN, , 001627, 1851545248	M	12/23/24	Missing Credential / Title

Location Approvals

- * All Full Service Medicaid counties will need to have the locations that are listed on attendances / session notes approved.
 - * Once a location is approved, it will not need to be approved again.
 - * To see what attendances were approved or invalidated, go to **Caseload Maintenance -> Service Location Approvals**, and filter for county and school year.
- * All session note / attendances must have a valid location.
 - * If the setting is Preschool, what is the name & location of the Preschool? You should enter the name & address of the Preschool under the location field on the session note.
 - * If the setting is Daycare, what is the name & address of the daycare.

Service Location Approvals For Provider

Filters

County

All Counties

▼

Provider

▼

School Year Session

2025 - 2026 Summer

▼

Retrieve

Location Approvals

- * Below is an example of Approved and Invalid session note locations.
- * You can click on the Enrollments, and you will see a list of children that have been invalidated for the location being Therapy Room. The setting is Therapy Room, so the location should be the address of the therapy room.
- * All notes need to be removed from the voucher, unsigned, corrected & resigned.

NASSAU	RS	Preschool	WIND 'N WILLOW PRESCHOOL: 1201 N BROADWAY, MASSAPEQUA, NY 11758	02/03/25	APPROVED	Enrollments
NASSAU	RS	Preschool	WIND AND WILLOW PRESCHOOL:	01/27/25	APPROVED	Enrollments
NASSAU	RS	Therapy Room	THERAPY ROOM:	02/14/25	INVALID	Enrollments
NASSAU	RS	Universal Pre-K	UPK NORTHSIDE Elementary School: 55 POWELL PL FARMINGDALE NY 11735	06/25/25	APPROVED	Enrollments

Enrollments for Service Location Approvals

LastName	FirstName	CPSEChildNumber	ESID	EnrollmentType	Service	Setting	Location	Oldest Service Date	Newest Service Date
E	ITEO	C28000	RS2425W0:	RS	OT	Therapy Room	THERAPY ROOM:	09/12/24	01/30/25
E	AN	C28000	RS2425W0:	RS	ST	Therapy Room	THERAPY ROOM:	09/12/24	12/19/24
C	:K	C28000	RS2425W0:	RS	PT	Therapy Room	THERAPY ROOM:	09/11/24	02/13/25
C	MA	C28000	RS2425W0:	RS	OT	Therapy Room	THERAPY ROOM:	09/10/24	10/31/24
I	RENZO	C28000	RS2425W0:	RS	OT	Therapy Room	THERAPY ROOM:	09/11/24	02/13/25
J	AVIS	C28000	RS2425W0:	RS	OT	Therapy Room	THERAPY ROOM:	10/29/24	02/14/25
F	VER	C28000	RS2425W0:	RS	OT	Therapy Room	THERAPY ROOM:	09/10/24	10/31/24
I	IN	C28000	RS2425W0:	RS	ST	Therapy Room	THERAPY ROOM:	09/10/24	02/13/25
F	SHA	C28000	RS2425W0:	RS	OT	Therapy Room	THERAPY ROOM:	09/05/24	10/31/24
S	N	C28000	RS2425W0:	RS	OT	Therapy Room	THERAPY ROOM:	09/05/24	10/31/24
S	M	C28000	RS2425W0:	RS	ST	Therapy Room	THERAPY ROOM:	09/17/24	01/23/25
T	/IN	C28000	RS2425W0:	RS	ST	Therapy Room	THERAPY ROOM:	09/05/24	02/03/25
V	AYDEN	C28000	RS2425W0:	RS	ST	Therapy Room	THERAPY ROOM:	09/17/24	12/17/24
V	JJAMIN	C28000	RS2425W0:	RS	OT	Therapy Room	THERAPY ROOM:	09/05/24	10/31/24



Reports

School Districts Using eSTACs

- * Agencies can go to **eSTACs -> Reports -> Submitted Placements**, and review children & services that the district has assigned to them.
- * You will filter for the county, district, school year, and click Retrieve.
- * You can review the Submission History and print the STAC-1 if needed.

Submitted Placements

Filters

County

ROCKLAND

District

ABBOT

Retrieve

Provider

All Providers

School Year Session*

2023 - 2024 Winter

Excel

County	District	Provider	School Year Session	Child Name	DOB	ESID	Description	Submitted Date	From Date	To Date	Service Type	Individual or Group	Frequency	Duration	Frequency Period	Location	SED Program Code	Status		
ROCKLAND	ABBOT	FRED S KELLER SCHOOL	2023 - 2024 Winter	Jones, Patty	10/1/2020		TVI 3x45 (Home)	10/25/2024	9/1/2023	11/30/2023	Teacher of Visually Impaired	I	3	45	WEEKLY	Home		Submitted	Submission History	Print STAC-1
ROCKLAND	ABBOT	Head Start of Rockland	2023 - 2024 Winter	Jones, Patty	10/1/2020		ST(I) 2x30 (Home)	10/25/2024	9/1/2023	11/30/2023	Speech Therapy Indiv	I	2	30	WEEKLY	Home		Submitted	Submission History	Print STAC-1
ROCKLAND	ABBOT	Head Start of Rockland	2023 - 2024 Winter	Jones, Patty	10/1/2020		ST(I) 1x30 (Home)	10/25/2024	9/1/2023	11/30/2023	Speech Therapy Indiv	I	1	30	WEEKLY	Home		Submitted	Submission History	Print STAC-1
ROCKLAND	ABBOT	HEBREW ACAD FOR SPEC CHLDRN	2023 - 2024 Winter	Jones, Patty	10/1/2020		OT(G) 2x30 (Preschool Classroom)	10/25/2024	9/1/2023	11/30/2023	Occupational Therapy Group	G	2	30	WEEKLY	Preschool Classroom		Submitted	Submission History	Print STAC-1
ROCKLAND	ABBOT	HEBREW ACAD FOR SPEC CHLDRN	2023 - 2024 Winter	Jones, Patty	10/1/2020		OT(I) 2x30 (Preschool Classroom)	10/25/2024	9/1/2023	11/30/2023	Occupational Therapy Indiv	I	2	30	WEEKLY	Preschool Classroom		Submitted	Submission History	Print STAC-1
ROCKLAND	ABBOT	HTA OF NEW YORK	2023 - 2024 Winter	Jones, Patty	10/1/2020		SEIS 4x30 (Home)	10/25/2024	9/1/2023	11/30/2023	Special Education (SEIS)	I	4	30	WEEKLY	Home		Submitted	Submission History	Print STAC-1

Missing Prescriptions Report

- * Go to **Medicaid -> Prescriptions -> Enrollments Needing Prescription.**
- * Filter by school year and county.
- * All Full Service Medicaid counties require a prescription for each service to voucher and bill for children.

ESID	Child Name	From - To	RS	Frequency			
CBRS2021W0034275	GORDON, FAUSTINO	09/08/2020 - 06/24/2021	ST	4x30	Assign To Existing Rx	Upload Image	
CBRS2021W0034276	GORDON, FAUSTINO	09/08/2020 - 06/24/2021	OT	3x30	Assign To Existing Rx	Upload Image	
CBRS2021W0034635	HUERTA, HUMBERTO	09/08/2020 - 06/25/2021	ST	2x30	Assign To Existing Rx	Upload Image	
CBRS2021W0034636	HUERTA, HUMBERTO	09/08/2020 - 06/25/2021	OT	2x30	Assign To Existing Rx	Upload Image	
CBRS2021W0034402	JONES, JAME	09/08/2020 - 06/24/2021	ST	3x30	Assign To Existing Rx	Upload Image	
CBRS2021W0034403	JONES, JAME	09/08/2020 - 06/24/2021	ST	1x30	Assign To Existing Rx	Upload Image	
CBRS2021W0034404	JONES, JAME	09/08/2020 - 06/24/2021	OT	2x30	Assign To Existing Rx	Upload Image	



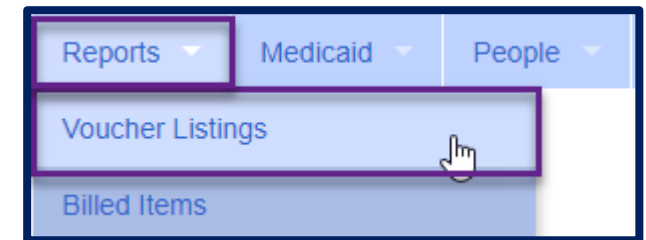
Missing CBRS Entries

- * There is now a report in the Portal that will show you children who you have billed the CB tuition for, but not the CBRS services.
- * Go to **Billing -> Missing CBRS Entries**, and filter for county and school year.
- * In the below example, you will see a child that the agency was paid the tuition for, but have not billed the CBRS services for July and August.
- * The agency should be periodically reviewing this report to see why you have not billed the CBRS. If possible, voucher and bill services.
- * We at McGuinness also review this report periodically and will email you asking why the CBRS has not been vouchered and billed to the county.

County	Provider	Child Name	CPSE Child #	ESID	Description	July	August	Total Submitted	Missing Months
WESTCHESTER	[REDACTED]	[REDACTED]	C6600 [REDACTED]	CBRS242 [REDACTED]	CBRS (ST) 9100-A 2x30 - I - (07/01/2024-08/09/2024)	MISSING	MISSING	0	2
WESTCHESTER	ACCOMMODATION	[REDACTED]	C6600 [REDACTED]	CBRS242 [REDACTED]	CBRS (OT) 9100-A 2x30 - I - (07/01/2024-08/09/2024)	MISSING	MISSING	0	2

Voucher Listing Report

- * To see all Vouchers that have been submitted to the county, you can run a Voucher Listing Report.
- * Go to **Reports -> Voucher Listings**
- * Enter Criteria, and choose how you want to sort your report.

A screenshot of a form titled 'Select Report Criteria'. It contains four input fields: 'School Year:' with a dropdown arrow, 'Service Type:' with a dropdown arrow, 'From Date:', and 'To Date:'. Each field has a corresponding text box for data entry.A screenshot of a form titled 'Sort Report'. It features a 'Sort By:' dropdown menu with a list of options: 'NumEnrollments', 'BillingDate', 'VoucherNumber', 'VoucherDescription', 'CountyName', 'TotalBilled', and 'NumEnrollments' (repeated at the bottom). The 'NumEnrollments' option at the bottom is highlighted in blue. To the right of the dropdown is a checkbox labeled 'Descending?'.

Voucher Listing Report

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

CP
SE
PORTAL

Voucher Listings

Printed: 7/2/2021 3:18:00 PM

Page 1 of 2

Report Criteria: School Year: 201819 Service Type: RS Sorted By: NumEnrollments Ascending

Voucher Number	Voucher Description	County Name	Billing Date	# Enrollments	Total Billed
RS190416194659	March 2019/Quinn	SCHENECTADY	4/16/2019	1	\$268.00
RS180805085528	July 2018	SCHENECTADY	8/5/2018	2	\$450.00
RS180819200723	August 2018	SCHENECTADY	8/19/2018	2	\$400.00
RS180819204244	July 2018	Albany	8/19/2018	4	\$1,100.00
RS180820185858	August 2018	Albany	8/20/2018	4	\$605.00
RS181010190803	September 2018	Albany	10/10/2018	6	\$1,870.00
RS181112190013	October 2018	Albany	11/12/2018	6	\$2,750.00
RS181208181032	November 2018	Albany	12/8/2018	7	\$2,365.00
RS190106124044	DECEMBER 2018	Albany	1/6/2019	7	\$2,090.00



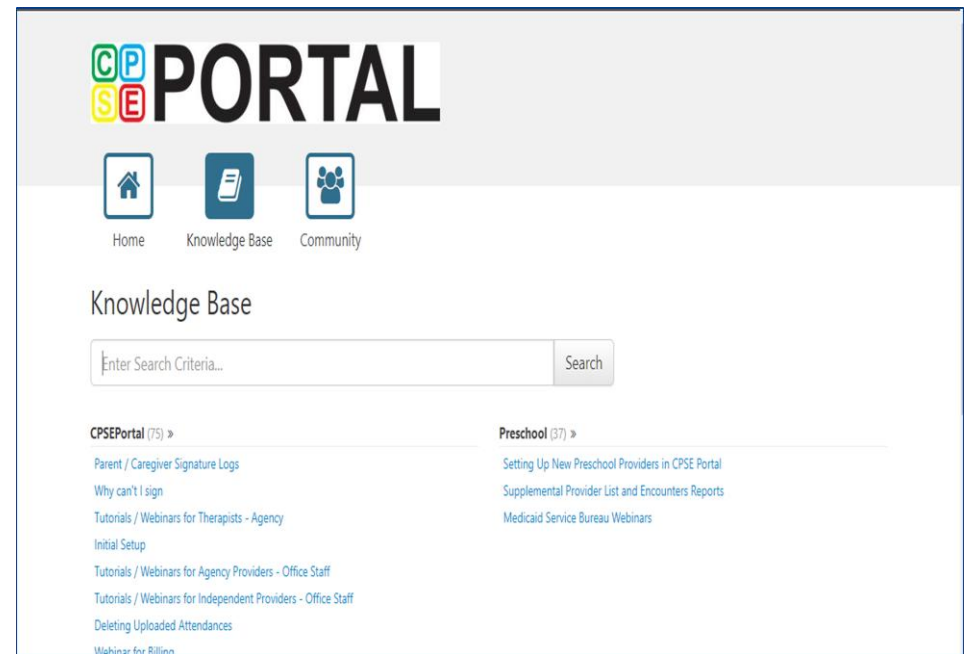
Closing

Important Note

- * You **cannot** bill on Unmatched Enrollments. Therefore, you should be matching your children, and unmatched enrollments throughout the week.

Portal Training – Knowledge Base

- * The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Portal support.
- * You can simply click the Knowledge Base tab in the Portal or you can go to:
- * <http://support.cpseportal.com/kb>



Helpful Knowledge Base Articles – Portal Invites & Credential Verification

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

Helpful Knowledge Base Articles – Creating Vouchers

- * Creating and Submitting a Voucher

- * <http://support.cpseportal.com/kb/a62/creating-and-submitting-a-voucher.aspx?KBSearchID=17204>

- * Why doesn't attendance appear to be put on a voucher?

- * <http://support.cpseportal.com/kb/a92/why-doesnt-attendance-appear-to-be-put-on-a-voucher.aspx?KBSearchID=17204>

- * Missing a Full Diagnosis (ICD) Code

- * <http://support.cpseportal.com/kb/a339/missing-a-full-diagnosis-icd-code.aspx?KBSearchID=25519>

- * How to Tell What is Missing from My Session

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

Helpful Knowledge Base Articles – Creating Vouchers

- * Therapist Cannot Unsign a Session
 - * <http://support.cpseportal.com/kb/a405/therapist-cannot-unsign-a-session.aspx?KBSearchID=25519>
- * How to Unsubmit a Voucher
 - * <http://support.cpseportal.com/kb/a445/how-to-unsubmit-a-voucher.aspx?KBSearchID=25519>
- * Attendance Denied? How to Remove in Order to Correct and Re-Bill
 - * <http://support.cpseportal.com/kb/a81/attendance-denied-how-to-remove-in-order-to-correct-and-re-bill.aspx?KBSearchID=17204>
- * How to Submit a Ticket to the CPSE Portal
 - * <http://support.cpseportal.com/kb/a188/how-to-submit-a-ticket-to-the-cpse-portal.aspx?KBSearchID=17204>

Closing Remarks

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