

Digital Speech Recommendations

for SLPs Using the Portal

(Updated July 2025)

CLARIFICATION

- □Today's webinar is for agencies (and their service providers) that are using the CPSE Portal to generate *digital speech recommendations*.
- □Today's webinar is <u>not</u> for agencies (and their service providers) that are using the **McGuinness CLAIMS/EnterClaims** software.

INTRODUCTIONS

- McGuinness Medicaid Team
 Deborah Frank, McGuinness Medicaid Specialist
 - Kelly Knowles, Medicaid Team
 - Ellen Farney, Medicaid Team
 - Darcy McMullen, Medicaid Team

ANNOUNCEMENT

"Per IEP" on Written Orders/Referrals – Medicaid Alert #25-09

- □ Effective with 7/1/26 service dates, SSHSP billing providers will no longer be able to bill Medicaid when written orders/referrals contain the phrase "Per the IEP."
- https://www.oms.nysed.gov/medicaid/medicaid_alerts/alerts_2025/25_09.html

Medicaid in Education Alert

New York State Department of Health (DOH), Office of Health' Insurance Programs (OHIP)

New York State Education Department (NYSED)

Preschool/School Supportive Health Services Program (SSHSP)

Medicaid in Education

Issue #25-09

TO: All SSHSP Medicaid Providers

FROM: NYS DOH OHIP SSHSP &

NYSED Medicaid in Education Unit

DATE: July 16, 2025

SUBJECT: Regarding "Per IEP" on Written Orders/Referrals

... Written Orders/Referrals must include details about the service(s) being ordered. Details such as the frequency and duration of the service must be included on the written order/referral.*

*Beginning with 7/1/26 Service Dates

TOPICS COVERED

- Benefits of Using the Digital Speech Recommendation
- Required Elements of a Written Order
- One-Time Set-up
- How to Create the Digital Speech Recommendation
- Troubleshooting the Digital Speech Recommendation Process
- Reports
- Unmatched Children & Enrollments
- OPRA

CPSE PORTAL DIGITAL ORDER/RECOMMENDATION

What is a digital order/recommendation?

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

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

ELECTRONIC SIGNATURES

Are electronic signatures acceptable? Yes.

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

WHEN SHOULD A WRITTEN ORDER BE COMPLETED?

(Timing of the Written Order) – Medicaid Handbook / Q&A

From the Medicaid Provider & Billing Handbook, Page 21

□ It should be noted that the written order/written referral must be in place prior to the initiation of services (prospective), including evaluations.

From the Medicaid Q & A – Question # 94

Can a NYS licensed and currently registered speech-language pathologist (SLP) who has not seen the student write a referral for speech therapy? No.

The SLP cannot write a referral if they have not seen the student 18NYCRR 505.11 states that a written order must contain a diagnostic statement and purpose of treatment. It is not acceptable under the Medicaid program for the ordering 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]

WHEN CAN A SLP PREPARE THEIR SPEECH RECOMMENDATION?

McGuinness received direction from SED regarding this specific issue.

SLPs can write a Speech recommendation "directly following" the initial session with the child under the following circumstances:

- ☐ The SLP uses the **results of the initial evaluation** (which should be delineated in the IEP)
- The SLP can be assured that the ordered services will meet the child's needs
- ☐ The SLP can be assured that the **child's level of function can be increased to the best possible outcome**
- If the above criteria can be met, the recommendation can be written on the <u>same day "after"</u> the initial <u>session</u> and the session <u>will be Medicaid-eligible</u>. If the prescription is not written on the same day that services began, any provided sessions that took place prior to the date of the prescription must be marked as "Not Medicaid-Eligible" on the session note.
- □ The date of the Speech recommendation must be the same date as the initial session with the child.

QUESTIONS

Any questions?

DIGITAL SPEECH RECOMMENDATIONS

- ☐ There are many benefits of using the digital option for Speech recommendations.
 - The digital recommendation is <u>Medicaid-compliant</u> and <u>verified</u> upon completion,
 - The resulting digital recommendation does not need to be scanned, entered and uploaded to the Portal,
 - The digital recommendation will limit (or eliminate) requests for replacement prescriptions.
 - The resulting services are Medicaid reimbursable if the SLP is OPRA enrolled.
- □ All full-service Medicaid counties have discontinued the practice of accepting paper prescription forms for speech services and are now <u>requiring</u> their SLPs to complete the digital speech recommendation in the Portal.

WHAT IS REQUIRED ON A MEDICAID WRITTEN ORDER?

Listed below is a list of all the required (8) elements of a Written Order. Only the items in red will need to be entered by the SLP when creating the digital recommendation; all other requirements will come up automatically* when the digital recommendation is generated. (*if the one-time set-up is completed for the ordering practitioner and billing provider.)

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

One-Time Set Up – Ordering Practitioner

Prior to creating any digital recommendation, there is a **one-time set-up** that is required for the **practitioner** as well as the **billing provider**. If this is not set up prior to creating the digital recommendation, the SLP will not be able to complete the digital recommendation.

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

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

ORDERING PRACTITIONER INFORMATION

(My Account > My Profile)



My Account>My Profile

My Profile		
Personal and Professional User Information Favorites ♥		
Last Name Stark First Name Shannon NPI 1003129438 Signature, Title, and Credentials (e.g.: Mary Brown, CCC-SLP) Stark Shannon Stark, M.A. CCC/SLP	Licenses / Certifications / Professions [NYS Office of the Professions] Description Credential Type # State NY Profession Code From To Active	/e
Information from NPPES NPI Registry Click here for NPPES website NPI 1003129438 This NPI is for an Individual First Name SHANNON Last Name STARK Credentials M.A. CCC/SLP	Mailing Address 1 205 CROCKER HILL RD Mailing Address 2 City BINGHAMTON State NY Zip 139042513	

PIN FOR DIGITAL SIGNATURES



PIN Selection							
You have already chosen a PIN.							
PIN Number: Username: sStark Password:	Change PIN						

One-Time Set Up – Billing Provider

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

[If you are a therapist that has an <u>independent vendor</u> contract with the County and bill the County directly, you are a billing provider.]

If you are a therapist <u>employed by an agency</u>, then the agency is the billing provider.]

- The **Billing Provider** must enter their billing information into the Portal (complete address and phone number including area code) to the **Billing Provider Profile** (if not already entered). If this is not set up prior to creating the digital recommendation, the SLP will not be able to complete the digital recommendation.
- The information that is entered for the billing provider becomes the SLP's contact information on the recommendation, which is required on all SSHSP prescriptions.

PROVIDER BILLING PROFILE





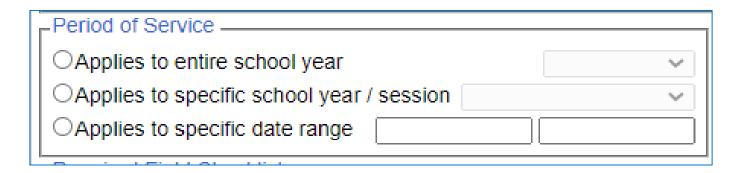
QUESTIONS

Are there any questions?

PERIOD OF SERVICE OPTIONS

(For the Digital Order)

- ☐ The Period of Service (Term of Service) for the prescription has three options for the provider to select.
 - 1) Applies to entire school year
 - 2) Applies to specific school year/session
 - 3) Applies to specific date range



- ☐ What you enter in this section is pre-determined by the child's enrollment(s).
 - If the child will be serviced for the **entire school year**, the **first option** will be selected and is also the default option.
 - If the child will be serviced for <u>only one session</u> (summer or 10-month session), the **second option** will be selected.
 - If the child is serviced on a <u>calendar year basis</u>, the third option will be selected and the <u>specific dates delineated on</u> the <u>IEP would be entered</u>.

CALENDAR YEAR DIGITAL ORDERS

IEP Service Dates: 5/1/24 to 4/30/25 (including ESY)

Prescriptions will be required as follows:

- 1) One order with service dates 5/1/24 to 6/30/24 (2023-24 school year **10-Mo**.)
- 2) One order with service dates 7/1/24 to 8/31/24 (2024-25 school year **ESY**)
- 3) One order with service dates 9/1/24 to 4/30/25 (2024-25 school year 10-Mo.)

IEP Service Dates: 5/1/24 to 4/30/24 (No ESY) Prescriptions will be required as follows:

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Prescription effective date range

○ Applies to entire school year 2022 - 2023 ▼

○ Applies to specific school year / session 2023 - 2024 Summer ▼

■ Applies to specific date range
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- 1) One order with service dates 5/1/24 to 6/30/24 (2023-24 school year)
- 2) One order with service dates 9/1/24 to 4/30/25 (2024-25 school year)

CPSE PORTAL DIGITAL SPEECH RECOMMENDATION

(How to Create the Digital Order/Recommendation)

There are two ways to create the digital recommendation – both are on the

CASELOAD MAINTENANCE Menu.

1) Prescriptions for Caseload

Caseload Maintenance > Prescriptions for Caseload

(Use this screen to enter initial/new prescriptions.)



2) Create New Order

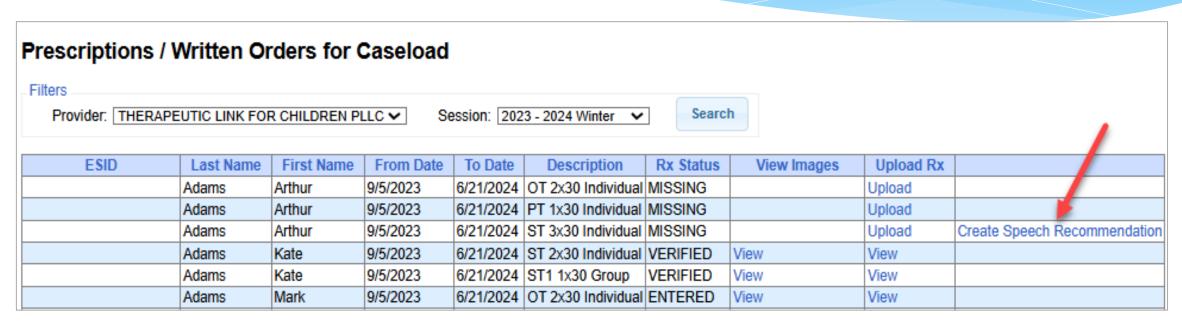
Caseload Maintenance > Create New Order > Enter Child's Name>Search

(Use this screen to enter **subsequent** prescriptions.)



PRESCRIPTIONS FOR CASELOAD

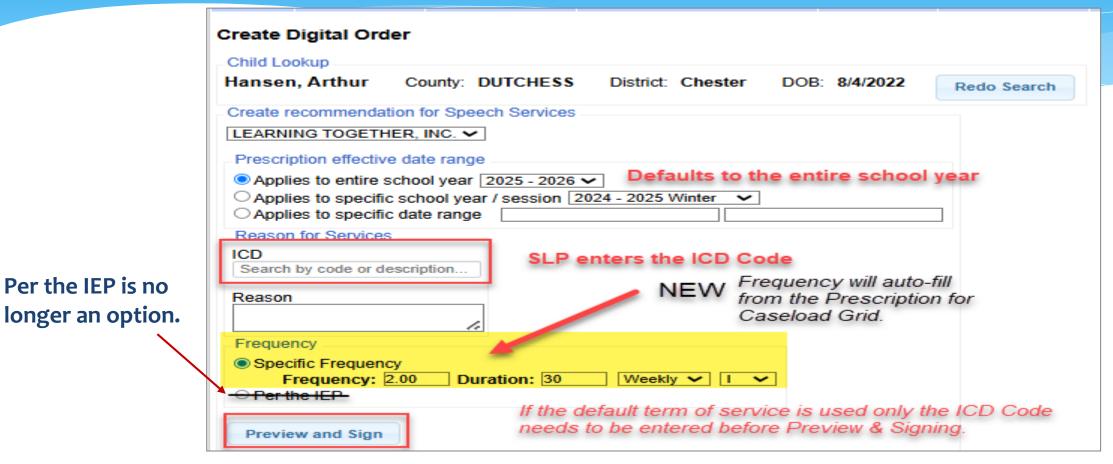
This screen is <u>only</u> for children that do <u>NOT</u> have a prescription uploaded. You will see an additional column on the <u>Prescriptions or Caseload Screen</u> that shows a link, <u>Create Speech Recommendation</u>.



- 1. Click the <u>Create Speech Recommendation</u> link. When the link is activated, <u>six of the eight</u> required items will auto-fill the digital recommendation template (Child's name, DOB, county, district, agency, term of service date range, Credentials & Practitioner's Contact Info).
- 2. The SLP will fill in the two remaining fields to complete the digital recommendation.
 - Enter all applicable ICD Codes
 - Preview & Digitally Sign (with your Pin #)

CREATING THE DIGITAL ORDER

(from the Prescriptions for Caseload Screen)



* NOTE: The date that the digital recommendation is created/saved, becomes the signature date of the recommendation and is the first date that Medicaid can be billed. The digital recommendation must be completed following the first session to ensure Medicaid compliance. The agency may need to create an "unmatched enrollment" that will need to be "matched" once the official record has been created.

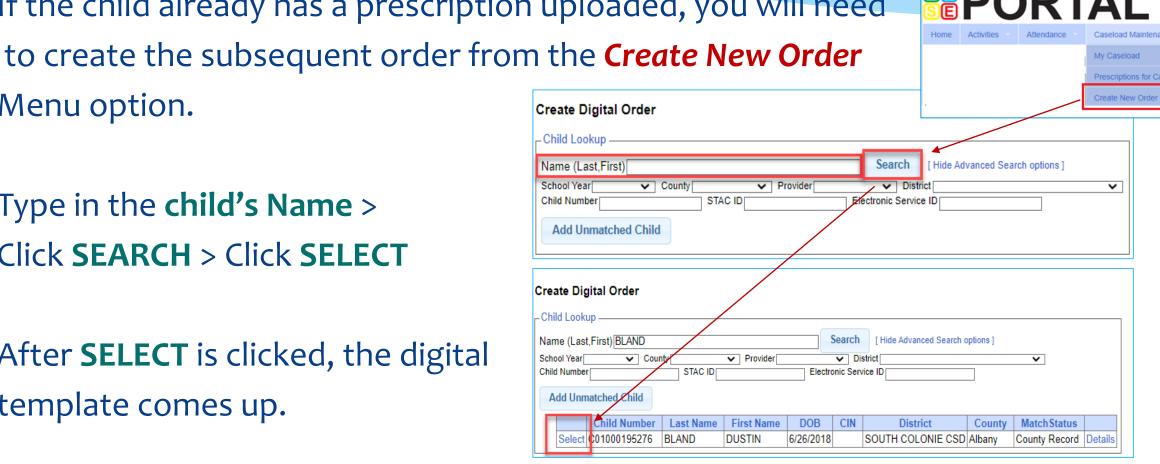
CREATE NEW ORDER

If the child already has a prescription uploaded, you will need

Menu option.

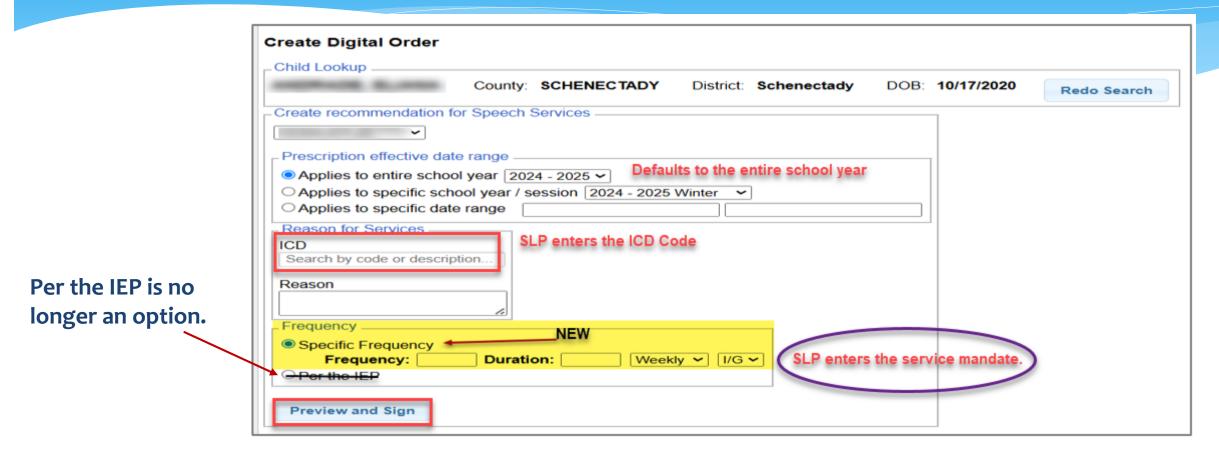
Type in the **child's Name** > Click **SEARCH** > Click **SELECT**

After **SELECT** is clicked, the digital template comes up.



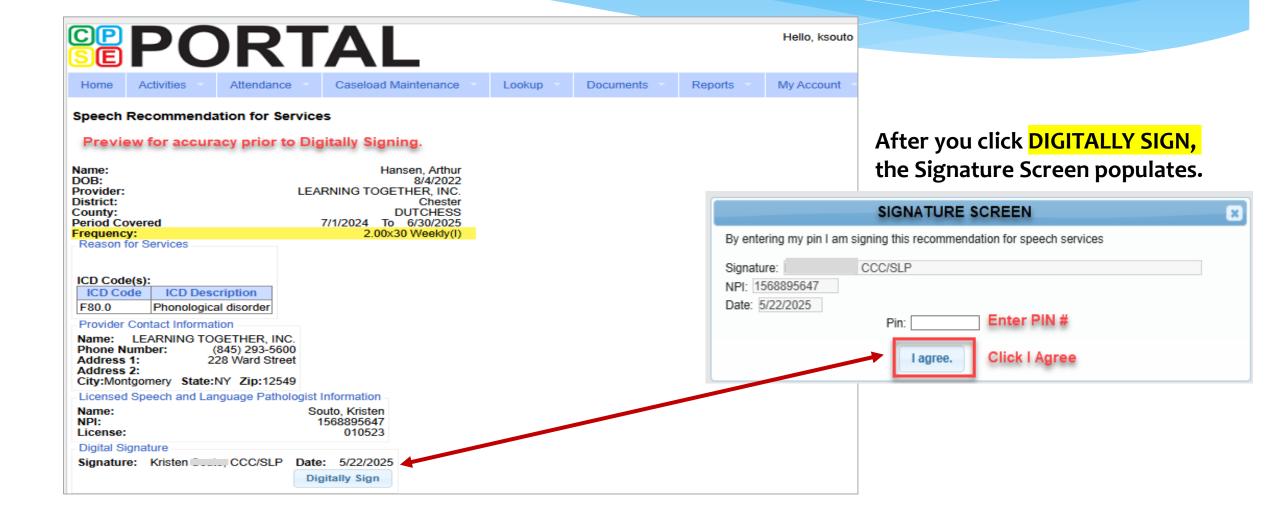
CREATING THE DIGITAL ORDER

(from the Create New Order Screen)



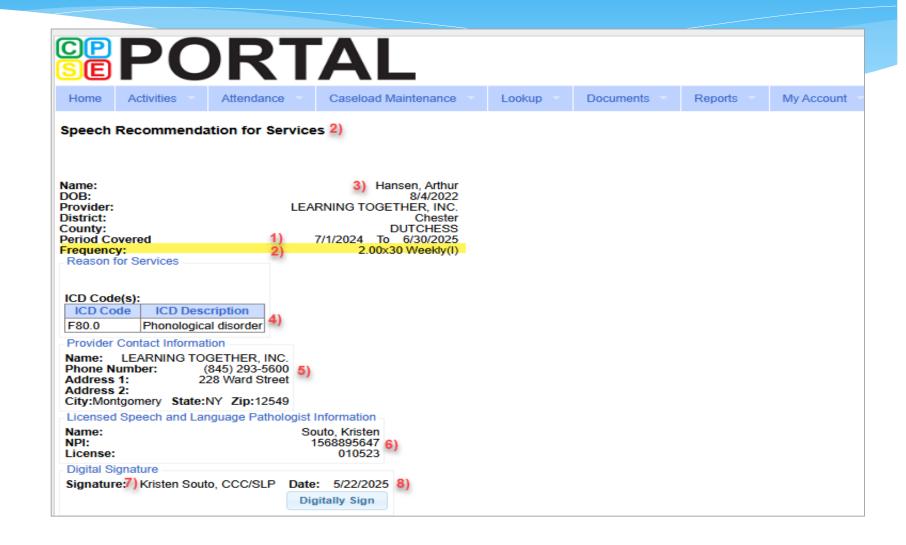
* NOTE: The date that the digital recommendation is created/saved, becomes the signature date of the recommendation and is the first date that Medicaid can be billed. The digital recommendation must be completed by the date of the first session to ensure Medicaid compliance. The SLP may need to create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

PREVIEW & SIGN THE DIGITAL ORDER



REQUIRED ELEMENTS OF A WRITTEN ORDER

- The Time Period
- The Service being ordered & the Frequency/Duration
- 3. Child's Name
- 4. Patient Diagnosis
- 5. Provider's Contact Information
- Ordering Practitioner's NPI/License #
- 7. Signature
- 8. Signature Date



DOWNLOADABLE / PRINTABLE COPY

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

ITEMS TO CHECK:

- Create Digital Order Screen
 - ✓ ICD Code & Digital Signature
- My Account>Billing Provider Profile
 - ✓ Address/Phone #
- My Account>My Profile
 - ✓ Name, NPI, License
 - ✓ Signature & Credentials
 - ✓ Digital Signature Set-up

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

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

Period Covered: 202425 School Year (Jul 01, 2024 to Jun 30, 2025 Speech Recommendation for Services A Speech and Language referral for services is recommended in accordance with the request by the Committee on Preschool Special Education. Student Name ELIANA Date of Birth 10/17/2020 Agency/Provider **CPSE District** Schenectady County SCHENECTADY F84.0: Autistic disorder ICD Code(s) Reason for Services 2.00x30 Weekly (G) Frequency Agency/Provider Contact information Address 1: 123 Main Street Address 2: City, State, Zip: Schenectady, ny, 12305 Phone: 518-111-1111 Licensed Speech and Language Pathologist information Betty NPI: 15080127 License: 0083 Digitally signed by: Betty Speech Pathologist, CCC-SLP 04/23/2025

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

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

The ICD is entered by the SLP on the "Create Digital Order" Screen.

The frequency is entered by the SLP on the "Create Digital Order" Screen.

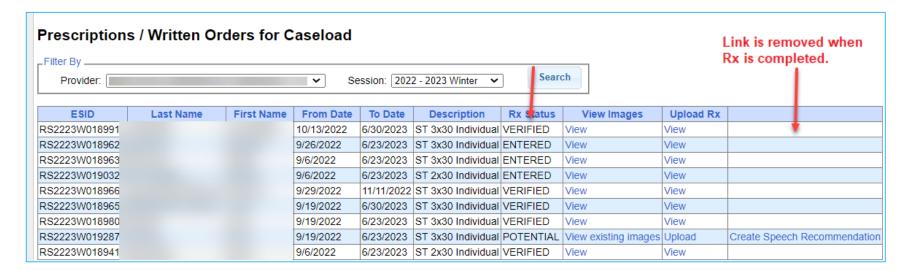
This block of information fills in from the Billing Provider Screen (My Account>Billing Provider Profile). If this is not filled in, the order cannot be created. This should be updated by the Agency.

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

The signature date fills in automatically when created.

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

- Go to Caseload Maintenance>Prescriptions for Caseload
 - A list of children on your caseload will come up.
 - You will see the status of your prescription (Entered, Verified, Missing)
 - You will also see that the <u>Create Speech Recommendation</u> link is no longer an option and the <u>Upload</u> <u>Rx</u> Link now displays "View."
 - If you click on the VIEW link in the <u>Upload Rx Column</u>, you will be able to view or print the digital speech recommendation.

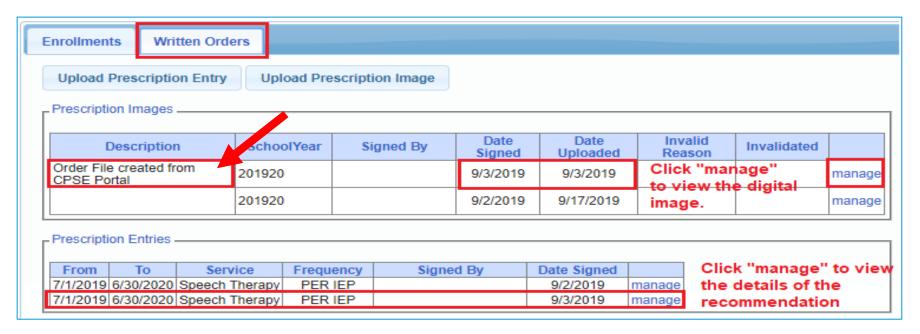


HOW DO YOU KNOW IF A DIGITAL SPEECH RECOMMENDATION HAS BEEN COMPLETED?

(From Child Lookup)

Lookup>Child Lookup>Written Orders Tab

Under the <u>Written Order Tab</u> you will see a <u>Description Column</u> in the first table. If a digital order has been completed successfully, you will see narrative that states, "Order File created from CPSE Portal." You will also see the date signed and upload dates for the order.

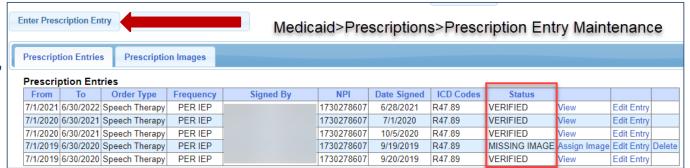


HOW DO YOU KNOW IF A DIGITAL SPEECH RECOMMENDATION HAS BEEN COMPLETED?

(From Prescription Entry Maintenance)

☐ Go to Medicaid>Prescriptions>Prescription Entry Maintenance> Type the name of the child > Search > Select > Prescription Entries Tab

From the **Prescription Entries Tab – Status Column**, you will see the status of the prescription (Verified, Entered, or Missing).

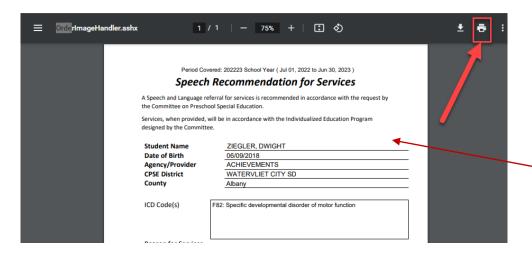


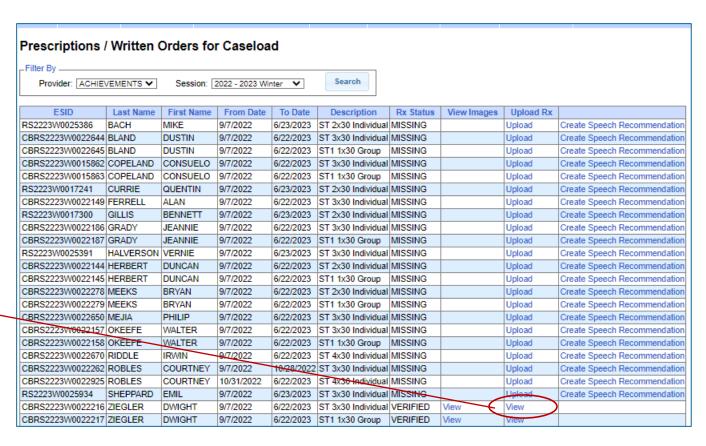
From the **Prescription Images Tab** - **Description column**, you will notice, **Order File created from CPSE Portal**. This tells you that you have successfully completed the digital speech recommendation and shows you the date it was signed, uploaded and created. Click "manage" to view/print the resulting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

Prescription	Entries	Prescription Images								
Prescription Images										
School Ye	ar	Description	Signed By	Date Signed	Date Uploaded	Image Status				
202122	Order	ile created from CPSE Portal		6/28/2021	6/28/2021	ATTACHED TO VERIFIED ORDER	View	Edit Image		
202021	Order l	File created from CPSE Portal		7/1/2020	7/1/2020	ATTACHED TO VERIFIED ORDER	View	Edit Image		

VIEW/PRINT RX FROM PRESCRIPTIONS FOR CASELOAD

- Click the "View" link in either the View Images or Upload Rx column.
- ☐ From the **Upload Rx** column, click "View."
- ☐ Right Click>Print, or
- Click the Printer Icon at the top of the screen.





DIGITAL SPEECH RECOMMENDATIONS

(Signature Date)

The signature date of the digital recommendation is the date that the SLP completed the digital recommendation in the Portal and that date is the first date that Medicaid can be billed. Any sessions that were provided **prior** to the digital recommendation signature date <u>will not be covered</u> by the digital recommendation (and cannot be submitted to Medicaid).

Please make sure you (the SLP) are checking the **Rx Status** once you have completed each child's digital recommendation.

Prescriptions / Written Orders for Caseload										
Provider: ACHIEVEMENTS ▼ Session: 2022 - 2023 Winter ▼ Search										
ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	View Images	Upload Rx		
RS2223W0025386	BACH	MIKE	9/7/2022	6/23/2023	ST 2x30 Individual	MISSING		Upload	Create Speech Recommendation	
CBRS2223W0022644	BLAND	DUSTIN	9/7/2022	6/22/2023	ST 3x30 Individual	MISSING		Upload	Create Speech Recommendation	
CBRS2223W0022645	BLAND	DUSTIN	9/7/2022	6/22/2023	ST1 1x30 Group	MISSING		Upload	Create Speech Recommendation	

DEMONSTRATION

How to enter a digital speech recommendation in the Portal

QUESTIONS

Are there any questions on creating the digital speech recommendation?

TROUBLESHOOTING (the Digital Speech Recommendation)

I filled in all the fields to generate the Digital Speech Recommendation, but could not complete the process. Why?

- There is a <u>one-time</u> set-up (for both the billing provider and the therapist) that fills in some of the "required" components of the digital speech recommendation. Have both profiles been completed?
 - ONE FOR THE BILLING PROVIDER (My Account>Billing Provider Profile), complete billing address and phone number (including area code)
 - **ONE FOR THE ORDERING PRACTITIONER SLP (My Account>My Profile)** including:
 - √ The ordering practitioner's name
 - ✓ NPI and license numbers
 - ✓ Signature, title and credentials
 - ✓ Pin # (for the digital signature)
- Did you enter the ICD Code(s)? (This is a required field. The order cannot be completed without the ICD Code.)
- Did you click "Preview and Sign" to preview and <u>digitally sign</u> the completed order? Did you click I Agree? (This is a required field. The order cannot be completed without a digital signature.)
- □ I can't complete a subsequent digital order. The <u>Create Speech Recommendation link</u> is not available, why?

 If the child had a prescription previously, you will need to use the "<u>Create New Order</u>" option (Caseload Maintenance>Create New Order).

QUESTIONS

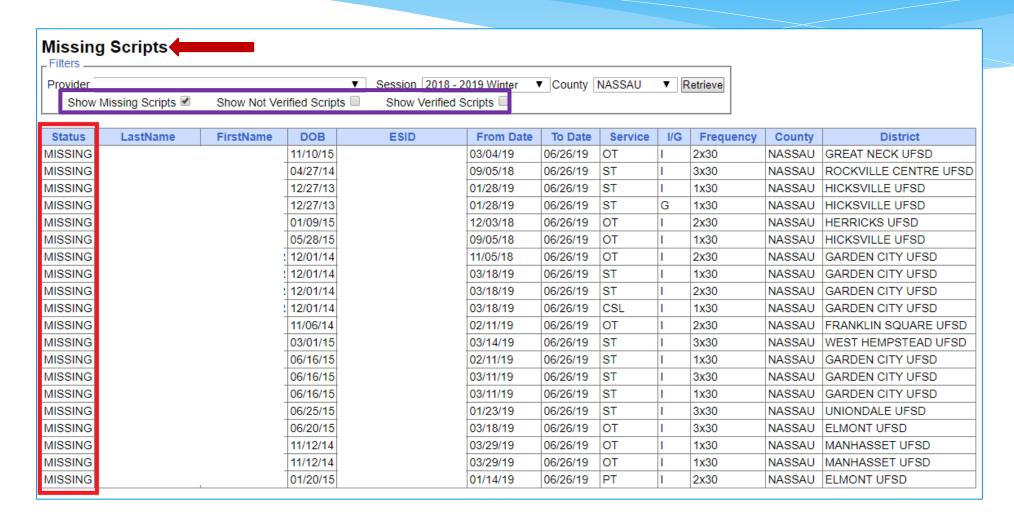
Any questions?

REPORTS

Missing Scripts & Status of Scripts

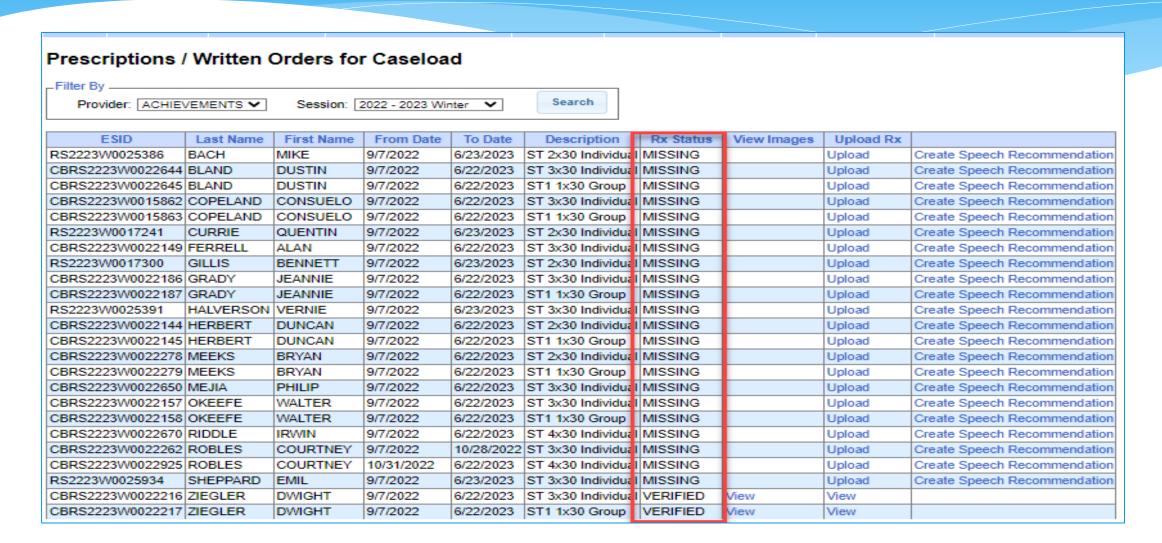
- ☐ There are two ways to run a report to check the prescription status of what has been completed or missing.
 - Billing Admins: Medicaid>Missing Documents > Missing Scripts
 This report will show what is missing, verified and/or not verified.
 - SLPs: Caseload Maintenance > Prescriptions for Caseload (Status of Prescriptions)
 This report will show the status for each child on your caseload.
 (Missing, Verified, Entered, Invalidated/Reason)

MISSING PRESCRIPTIONS REPORT Medicaid > Missing Documents > Missing Scripts



PRESCRIPTION STATUS

Caseload Maintenance > Prescriptions for Caseload



QUESTIONS

Any questions on the reports?

UNMATCHED ENROLLMENTS & DIGITAL ORDERS

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

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

UNMATCHED ENROLLMENTS & DIGITAL ORDERS

- ☐ Service providers (SLPs) cannot create unmatched enrollments.
- If the county enrollment is not created before the first service date of the school session, the agency must create an unmatched child (if the child is not already in the Portal) and an unmatched enrollment.
- □ If an SLP creates a digital recommendation without an unmatched enrollment, the digital recommendation will not be attached to the enrollment.

ORDERING, PRESCRIBING, REFERRING, ATTENDING (for SLPs Only)

- ☐ In order for Medicaid to pay on a claim, the ordering/referring provider must be enrolled with Medicaid as an <u>Ordering, Prescribing, Referring or Attending (OPRA)</u> provider.

 (OT/PT Service Providers do not diagnose/prescribe so OPRA enrollment is not required.)
- ☐ Most counties require that their SLPs (who are recommending/ordering) be OPRA enrolled so the services they provide will be Medicaid reimbursable.
- ☐ How do you know if you are enrolled? The link below will allow you to search eMedNY to determine your eligibility.

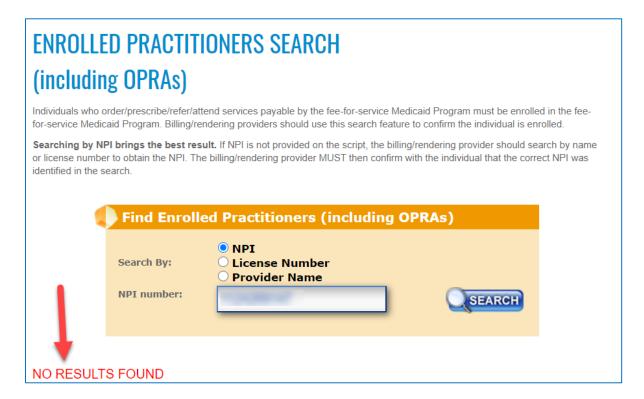
Enrolled Practitioner's Search Page: (to check your enrollment status):

https://www.emedny.org/info/opra.aspx

ENROLLED PRACTITIONER'S SEARCH

Enter your NPI>Click Search.

If not enrolled, you will see, "NO RESULTS FOUND."



If enrolled, you will see, "1 match found" with all your pertinent information.



Ordering, Prescribing, Referring, Attending – OPRA Helpful Links / Phone # - eMedNY

eMedNY Call Center Phone Number: 1-800-343-9000 **Enrolled Practitioner's Search Page:** (to check your enrollment status): https://www.emedny.org/info/opra.aspx ■ **Next Anticipated Revalidation Date:** (to check your revalidation status): https://health.data.ny.gov/Health/Medicaid-Enrolled-Provider-Listing/keti-qx5t/data ☐ Provider Enrollment & Maintenance Screen: (Application) New Enrollment • Revalidation • Reinstatement/Reactivation https://www.emedny.org/info/ProviderEnrollment/ther/index.aspx ■ **Revalidation Information:** (Enrolled – Required to Revalidate) https://www.emedny.org/info/ProviderEnrollment/revalidation/index.aspx ☐ Link to Frequently Asked Questions (FAQs): https://www.emedny.org/info/ProviderEnrollment/ProviderMaintForms/Core OPRA FAQs.pdf **Link to Change your Address**

https://www.emedny.org/info/ProviderEnrollment/changeaddress.aspx

QUESTIONS

Any questions?

FOLLOW-UP

- ☐ This presentation is being 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: Medicaid@CPSEPortal.com
 - Questions/Guidance regarding Medicaid compliance: Contact Deborah Frank dfrank@jmcguinness.com.
- HELPFUL LINKS
- MEDICAID REFERENCES
 - Provider Policy & Billing Handbook http://www.oms.nysed.gov/medicaid/handbook/
 - Medicaid Questions & Answers http://www.oms.nysed.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf

THANK YOU!

I want to thank everyone for taking the time to attend this presentation.

I hope you found the content helpful.

Deborah Frank