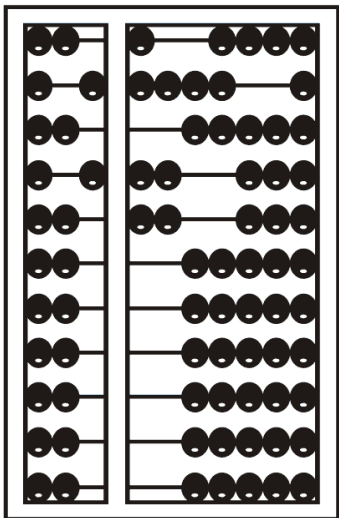


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Digital Speech Recommendations For SLPs

(Updated April 2021)

PURPOSE OF WEBINAR

Today's presentation is specifically for Speech-Language Pathologists.

- ❑ Discuss the benefits of creating a Digital Speech Recommendation
- ❑ Show you the quick/simple process of creating the Digital Speech Recommendation

TOPICS COVERED

- ❑ Benefits of Using the Digital Speech Recommendation
- ❑ When Should the SLP Create the Speech Recommendation?
- ❑ Required Elements of a Written Order
- ❑ One-Time Set-up
- ❑ How to Create the Digital Speech Recommendation
- ❑ Unmatched Children/Enrollments
- ❑ Matching Unmatched Children/Enrollments
- ❑ Recap

CPSE PORTAL DIGITAL ORDER/RECOMMENDATION

What is a digital order/recommendation?

- ❑ It is a written order/recommendation (*for Speech Therapy Services*) that is created on the computer and digitally signed, rather than written on paper and signed with a pen.
- ❑ The digital order follows all the requirements of a paper order except that it is created and signed digitally.

ELECTRONIC SIGNATURES

Are electronic signatures acceptable? Yes.

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

WHEN SHOULD THE SLP PREPARE THE RECOMMENDATION?

- ❑ There have been some questions regarding the timing of when the Medicaid Speech recommendation can be created.
- ❑ *The Medicaid Q&A, #94 states that SLPs cannot write a speech recommendation until “after” the child has been seen.*

MEDICAID QUESTIONS & ANSWERS

Timing of the Speech Recommendation

Question #94:

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

Answer: No.

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

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

CLARIFICATION FROM SED

When the Recommendation Should be Completed

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

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

(* This has been confirmed with SED.)

QUESTIONS

Questions ???

CPSE PORTAL DIGITAL SPEECH RECOMMENDATION

(Reasons to Select the Digital Option)

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

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

CPSE PORTAL DIGITAL SPEECH RECOMMENDATION

(Reasons to Select the Digital Option - Continued)

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

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

WHAT IS REQUIRED ON A MEDICAID WRITTEN ORDER?

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

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

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

ELECTRONIC DIGITAL ORDER

One-Time Set Up – Ordering Practitioner

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

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 ▾ Knowledge Base
- Change Password
- User Account Details
- My Credential Verifications
- My Profile
- My PIN

My Profile

- Personal and Professional
- User Information
- Favorites ♥

Information in CPSE Database

Last Name

First Name

NPI

Signature, Title, and Credentials
(e.g.: Mary Brown, CCC-SLP)

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

	Description	Credential Type	#	State	NY Profession Code	From	To	Active		
SLP	Licensed Speech & Language Pathologist	License	010654	NY	058	9/15/1998	12/31/2021	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

Information from NPPES NPI Registry

[Click here for NPPES website](#)

NPI This NPI is for an

First Name

Last Name

Credentials

Mailing Address 1

Mailing Address 2

City State Zip

PIN FOR DIGITAL SIGNATURES

My Account ▾	Knowledge Base
Change Password	
User Account Details	
My Credential Verifications	
My Profile	
My PIN	

PIN Selection

You have already chosen a PIN.

PIN Number:

Username:

Password:

DIGITAL SPEECH RECOMMENDATION

One-Time Set Up – Billing Provider

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

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

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

PROVIDER CONTACT INFORMATION

My Account ▾ Know
Change Password
User Account Details
My Profile
My PIN
Billing Provider Profile

Billing Provider Profile

Provider Info

User Information

Billing Provider

Name

Billing Address

Address 1

Address 2

City

State

Zip

Phone Number

CPSE PORTAL DIGITAL SPEECH RECOMMENDATION

(How to Create the Digital Order/Recommendation)

□ There are two ways to create the digital order.

1) **“Prescriptions for Caseload”** under the Caseload Maintenance Menu.

Caseload Maintenance>Prescriptions for Caseload

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

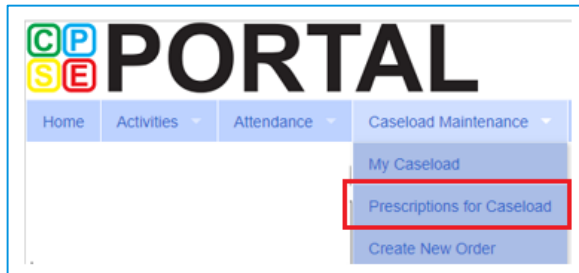
2) You can also use the **“Create New Order”** under the Caseload Maintenance Menu.

Caseload Maintenance>Create New Order

(Use this screen to enter subsequent prescriptions. – e.g., when a change in service occurs and a new Rx is required.)

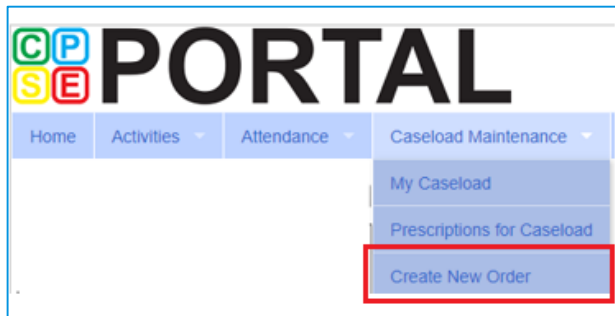
TWO WAYS TO ACCESS THE DIGITAL ORDER SCREEN

1. Caseload Maintenance > Prescriptions for Caseload



Use this option for initial prescriptions.

2. Caseload Maintenance > Create New Order



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

PRESCRIPTIONS FOR CASELOAD


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

Prescriptions / Written Orders for Caseload

Filter By _____

Provider: Session: 2018 - 2019 Winter

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



1. Click the **“Create Speech Recommendation”** link. When the link is activated, **six of the eight** required items will autofill the digital order template (*Child’s name, DOB, county, district, agency & term of service – date range*).
2. You will fill in the two remaining fields to complete the digital order.
 - * Enter all applicable ICD Codes
 - * Preview & Digitally Sign (with your Pin #)

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

CREATING THE DIGITAL ORDER

Digital Recommendation Template

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

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

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

1. ICD Code(s)
2. Digital Signature



The screenshot shows the 'Create Digital Order' form with the following sections and annotations:

- Child Lookup:** Displays 'BAXTER, DAVIDA', 'County: SCHENECTADY', 'District: Schenectady', and 'DOB: 10/8/2014'. A 'Redo Search' button is present. An annotation with a red arrow points to this section, stating 'Fills in automatically.'
- Create recommendation for Speech Services:** Includes a dropdown menu currently set to 'THERAPY'. An annotation with a red arrow points to this dropdown, stating 'Fills in automatically.'
- Prescription effective date range:** Features three radio button options: 'Applies to entire school year' (selected), 'Applies to specific school year / session', and 'Applies to specific date range'. The selected option has a date range of '2018 - 2019'. An annotation with a red arrow points to this section, stating 'Defaults to "Applies to Entire School Year, but you can select the other options.'
- Reason for Services:** Contains an 'ICD' field with 'F80.2 F80' entered and a 'Reason' text area. An annotation with a red arrow points to the ICD field, stating 'Type in the ICD Code(s).'
- Buttons:** A 'Preview and Sign' button is at the bottom. An annotation with a red arrow points to this button, stating 'Click Preview and Sign'.

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

PREVIEW & SIGN THE DIGITAL ORDER

CPSE PORTAL Hello, astark. You are currently logged in for Shannon Stark. (Logout) JAMES W & ASSOC Consul

Home Activities Attendance Caseload Maintenance Lookup Reports My Account Knowledge Base

Speech Recommendation for Services

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

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

Reason for Services

ICD Code(s):

ICD Code	ICD Description
F80.0	Phonological disorder

Provider Contact Information

Name: PROGRESSUS THERAPY, LLC
Phone Number: 8665551111
Address 1: 123 Main Street
Address 2:
City: Albany **State:** NY **Zip:** 12245

Licensed Speech and Language Pathologist Information

Name: Stark, Shannon
NPI: 1003129436
License: 010654

Digital Signature

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

By entering my pin I am signing this recommendation for speech services

Signature: Shannon Stark, M.A. CCC/SLP
NPI: 1003129436
Date: 1/14/2019

Pin: **Enter PIN #**

Click I AGREE

Preview to ensure accuracy. If accurate, click DIGITALLY SIGN.

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REQUIRED ELEMENTS OF A WRITTEN ORDER

CPSE PORTAL Hello, sstark . You are currently logged in for Shannon Stark (Logout) JAMES MCGUINNESS & ASSOCIATES CONSULTANTS

Home Activities Attendance Caseload Maintenance Lookup Reports My Account Knowledge Base

Speech Recommendation for Services

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

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

Reason for Services

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

Provider Contact Information

Name: PROGRESSUS THERAPY, LLC **5**
Phone Number: 8885551111
Address 1: 123 Main Street
Address 2:
City: Albany **State:** NY **Zip:** 12345

Licensed Speech and Language Pathologist Information

Name: Stark, Shannon **6**
NPI: 1003129438
License: 010654

Digital Signature

Signature: Shannon Stark, M.A. CCC/SLP **Date:** 1/14/2019 **7 & 8**

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

DOWNLOADABLE / PRINTABLE COPY

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

ITEMS TO CHECK:

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

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

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

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

Speech Recommendation for Services

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

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

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

ICD Code(s) F80.0: Phonological disorder

Reason for Services

Agency/Provider Contact information

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

Licensed Speech and Language Pathologist information

Name:	Stark, Shannon
NPI:	1003129438
License:	010654

Digitally signed by:

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

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

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

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

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

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

The signature date fills in automatically when created.

Demonstration

How to Create a Digital Speech Recommendation

QUESTIONS

QUESTIONS??

Prescriptions for Caseload Screen – (for SLPs)

Check Prescription Status, View & Print

❑ Go to **Caseload Maintenance>Prescriptions for Caseload**

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

Link is removed when Rx is completed.

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

From Child Lookup– (for Agency Staff) Check Prescription Completion, View & Print

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

Enrollments **Written Orders**

Upload Prescription Entry Upload Prescription Image

Prescription Images

Description	SchoolYear	Signed By	Date Signed	Date Uploaded	Invalid Reason	Invalidated	
Order File created from CPSE Portal	201920		9/3/2019	9/3/2019	Click "manage" to view the digital image.		manage
	201920		9/2/2019	9/17/2019			manage

Prescription Entries

From	To	Service	Frequency	Signed By	Date Signed	
7/1/2019	6/30/2020	Speech Therapy	PER IEP		9/2/2019	manage
7/1/2019	6/30/2020	Speech Therapy	PER IEP		9/3/2019	manage

Click "manage" to view the details of the recommendation

- Under **Prescription Images** - Description column, you will notice the narrative, **“Order File created from CPSE Portal.”** This tells you that the SLP has successfully completed the digital speech recommendation and shows you the date it was signed and uploaded/created. Click **“manage”** in the grid to view the digital Rx Image or Rx Entry. Once the image comes up, if you need to print the recommendation, right click on the image and select print.

QUESTIONS

Questions??

UNMATCHED ENROLLMENTS & DIGITAL ORDERS

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

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

HOW TO CREATE AN UNMATCHED CHILD

- ❑ Go to Caseload Maintenance>Unmatched Children>Click Add Child
- ❑ Fill in the “Add Child” Screen>Click Add

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

Home	File Transfer	Activities	eSTACs	Attendance	Billing	Caseload Maintenance	Lookup	Reports	Medicaid	People	My Account	Knowledge Base
------	---------------	------------	--------	------------	---------	-----------------------------	--------	---------	----------	--------	------------	----------------

Unmatched Children **Add Child** **Click "Add Child"**

Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
								NY			Enrollments	Attempt Match	Edit	Delete
								NY			Enrollments	Attempt Match	Edit	Delete
								NY			Enrollments	Attempt Match	Edit	Delete

***To Edit or Delete an unmatched child, click the appropriate button at the end of the row.**

Add Child

Provider

County District

Last Name First Name MI

DOB Gender

Address 1 Address 2

City State Zip

Home Phone

SEDSTACID

Add **Fill in all the pertinent information and click Add.**

HOW TO CREATE AN UNMATCHED ENROLLMENT

Go to Caseload Maintenance > Add/Edit Unmatched Enrollments



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

Unmatched Enrollments

Name (Last,First) [Show Advanced Search options]

- Fill in all the pertinent information in the table (Session, Enrollment Type, Etc.).
- Click “Add” at the end of the row.

Unmatched Enrollments

County: NASSAU District: NEW HYDE PARK-GARDEN CITY PARK UFSD DOB: 10/27/2009

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Weekly	<input type="button" value="Add"/>

Fill in all the pertinent information > click Add

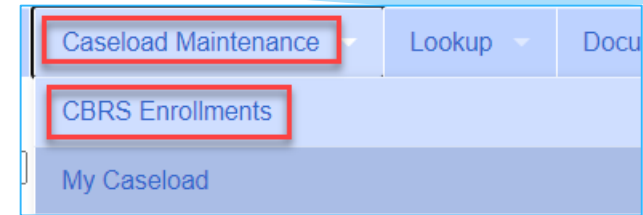
Demonstration

- How to Add an Unmatched Child
- How to Add an Unmatched Enrollment

HOW TO CREATE AN UNMATCHED CBRS ENROLLMENT

☐ Go to Caseload Maintenance>CBRS Enrollments

- Select the **correct session**,
- Enter the **Provider**
- Enter the **County**
- Enter the child's information (**Last Name, First Name, DOB**)
- Click **Search**



CB Enrollments

Session Provider County Last Name First Name DOB

County	District	Last Name	First Name	ElectronicServiceID	Provider	Program	Start Date	End Date	
SCHENECTADY	Burnt Hills- Ballston Lake	Smith	Lisa		ACHIEVEMENTS	-G	01/20/2020	06/25/2020	Select

HOW TO CREATE AN UNMATCHED CBRS ENROLLMENT - Continued

- Fill in the following CBRS data.

- ✓ From and To **Dates**
- ✓ **RS Type** (OT/PT/ST)
- ✓ **Individual or Group**
- ✓ **Units** (Frequency)
- ✓ **Minutes** (Duration)
- ✓ **Time Span** (Weekly, Monthly, etc.)
- ✓ Click **ADD**

CB Enrollments

Session: 2019 - 2020 Winter | Provider: ACHIEVEMENTS | County: SCHENECTADY | Last Name: Smith | First Name: Lisa | DOB: 7/29/16

County	District	Last Name	First Name	Electronic ServiceID	Provider	Program	Start Date	End Date	
SCHENECTADY	Burnt Hills-Balston Lake	Smith	Lisa		ACHIEVEMENTS	-G	01/20/2020	06/25/2020	Select

Included Services for

Electronic ServiceID	From	To	RS Type	I or G	Units	Minutes	Timespan	Edit	Delete
	12/14/2020	6/25/2021	ST	I	2.00	30	WEEKLY	Edit	Delete
	12/14/2020	6/25/2021					WEEKLY	Add	

HOW TO MATCH AN UNMATCHED CHILD

- ❑ Go to **Caseload Maintenance > Unmatched Children**
- ❑ Click on the **“Attempt Match”** link

Unmatched Children [Add Child](#)

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
C52000155289	ABRAMS	EDDIE		8/10/2015	SARATOGA	WATERFORD-HALFMOON UFSD			NY			Enrollments	Attempt Match	Edit	Delete
C53000155702	Frank	Deb		7/25/2016	SCHENECTADY	BALLSTON SPA CSD			NY			Enrollments	Attempt Match	Edit	Delete

- ❑ Click **Select**

Match Child Against County-Imported Child

Current Unmatched Child:

County: District: DOB: **12/12/2017**

Potential Matches:

Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select		MON		12/12/2017					NY	10000	

HOW TO MATCH AN UNMATCHED CHILD

- ❑ After you click **Select**, the unmatched child (on the bottom left) and official record (on the bottom right) added by the County will appear at the bottom of the screen.
- ❑ If the child's name and date of birth match for both records, click Match.

Match Child Against County-Imported Child

Current Unmatched Child:
County: [REDACTED] District: [REDACTED] DOB: 12/12/2017

Potential Matches:
Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
<input type="button" value="Select"/>	[REDACTED]	MON	[REDACTED]	12/12/2017	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	NY	108	[REDACTED]

WARNING: By clicking the button below, you are combining these two children (including any associated data - not limited to: enrollments, attendances, medicaid correct. This cannot be undone.

[REDACTED], MON (12/12/2017) → [REDACTED], MOI (12/12/2017)

HOW TO MATCH AN UNMATCHED ENROLLMENT

- ❑ Go to **Caseload Maintenance > View Unmatched Enrollments**
- ❑ Type in the Child's name > **SEARCH**
- ❑ Find the child in the list and click the "Attempt Enrollment Match" link.

Unmatched Enrollments
School Year:

County	Child Number	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description			
	C6600017			07/14/17	202021	01/27/21	06/25/21	RS	ST	1x30	Attendances	Attempt Enrollment Match	<input type="button" value="Delete"/>
	C660001			01/18/14	201718	09/05/17	06/22/18	RS	ST	2x30	Attendances	Attempt Child Match	<input type="button" value="Delete"/>

Match Enrollment Against County-Imported Enrollment

Child: County: District: DOB: 7/14/2017

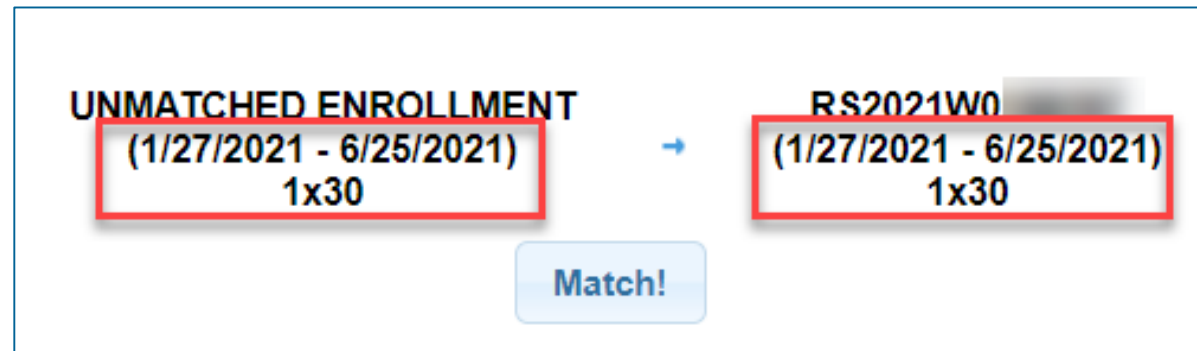
Current Unmatched Enrollment:
Session: 2020 - 2021 Winter From Date: 1/27/2021 To Date: 6/25/2021
Enrollment Type: RS Service Type: ST Individual or Group: I Frequency: 1x30

Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
<input type="button" value="Select"/>	RS	ST	2020 - 2021 Winter	1/27/2021	6/25/2021	I	1x30	RS2021WC
<input type="button" value="Select"/>	RS	ST	2020 - 2021 Winter	1/27/2021	6/25/2021	I	1x60	RS2021WC

HOW TO MATCH AN UNMATCHED ENROLLMENT

- ❑ After you click SELECT for the correct enrollment, the unmatched enrollment information and the official enrollment information appear at the bottom of the screen.
- ❑ If the unmatched dates of service and frequency matches the official enrollment, click the MATCH button.



QUESTIONS

Questions?

RECAP

The digital option will...

- ✓ Auto-fill six of the eight required items
- ✓ Ensure a Medicaid-compliant order
- ✓ Ensure no interruptions in billing or Medicaid claiming*
- ✓ Reduce or eliminate requests for back documentation*
- ✓ Save time – no printing, scanning, uploading or entering required

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

** If the order is generated prior to the first session with the child.*

Still Have Questions?

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

FOLLOW-UP

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

- ❑ **HELPFUL LINKS**
 - **Entering Unmatched Children and Unmatched Enrollments**
<http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx>

 - **Entering Unmatched CBRS Enrollments**
<http://support.cpseportal.com/Management/Root.aspx>

 - **Creating a Digital Speech Recommendation**
<http://support.cpseportal.com/kb/a163/creating-a-digital-speech-recommendation.aspx>

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