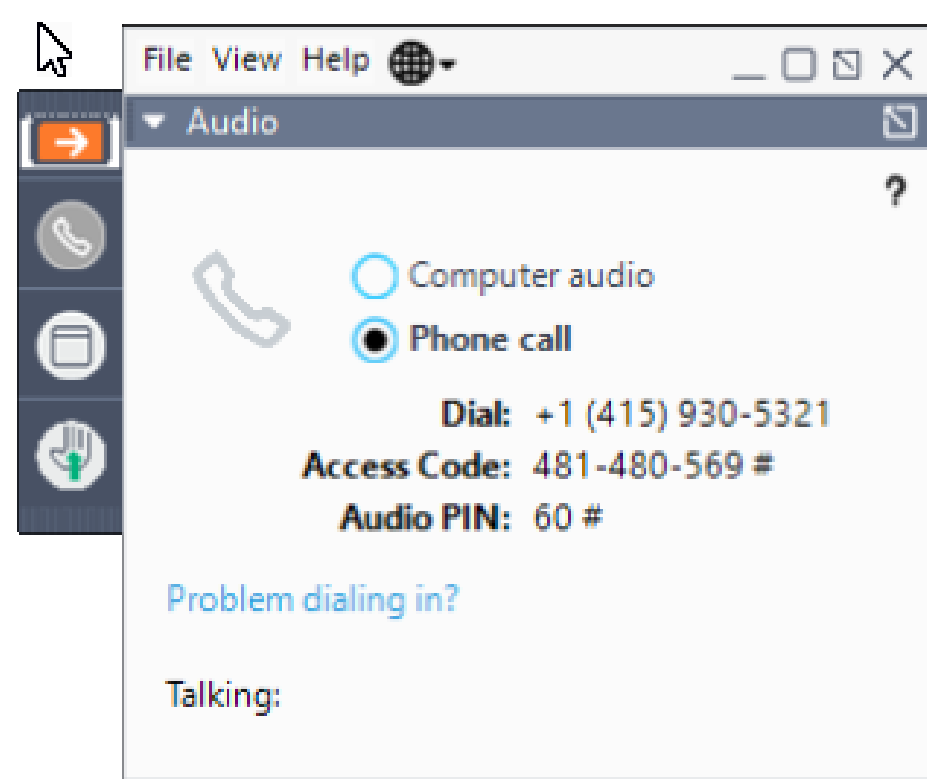JAMES McGUINNESS & ASSOCIATES INC. Consultants

Using Go To Webinar

Go To Webinar Control Panel

* Control panel is on far right of screen

* Orange button with white arrow expands and shrinks control panel
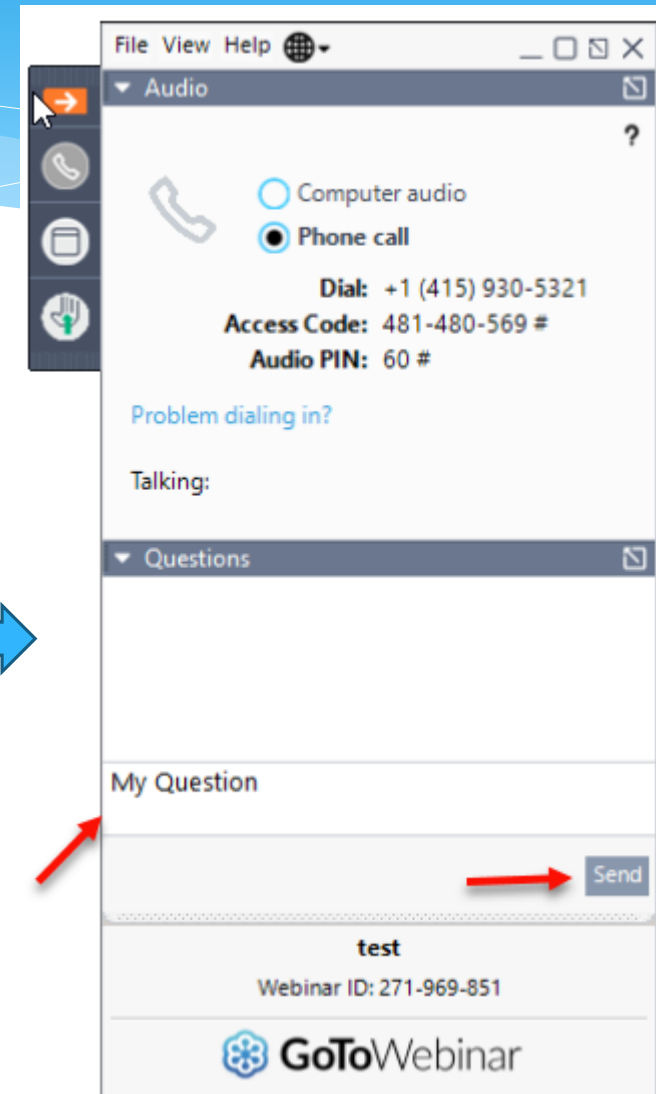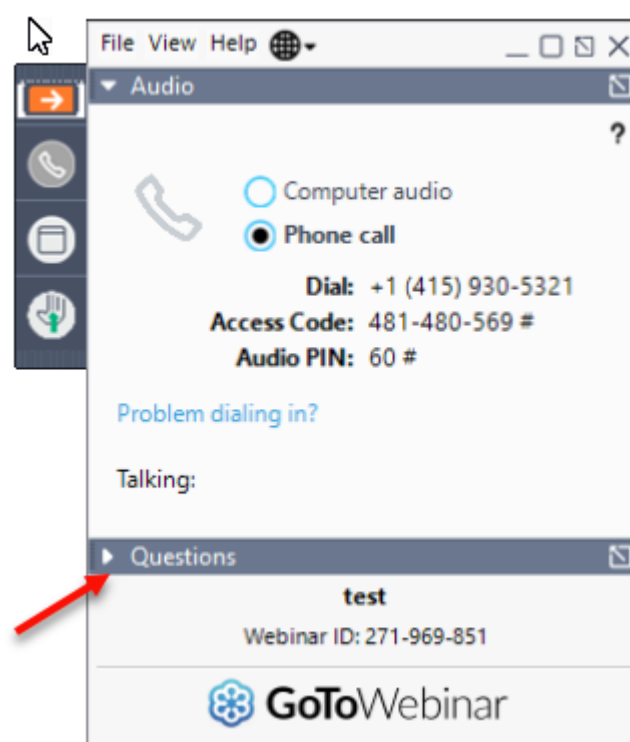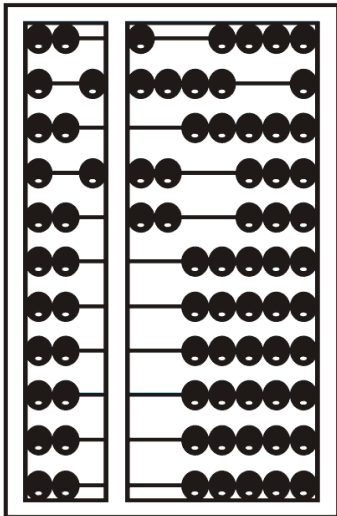
Communicating with Presenter

* All participants are on mute.

* You can type in question in the question box.

* We will answer your question, and also stop at some point to review the questions and answers for everyone.

Typing in a Question

* Click the question bar to expand questions section

* Type in your question and click send

Topics Covered

* Review of Import Person with License Template – *Slide 8*
  * Portal Profession Codes

* Review of Credential Verification – *Slide 11*
  * Credential Verification for Therapists Without a Login
  * Credential Verification by Agency Office Staff

* What is an ESID – *Slide 18*

* Schema Attendance File – *Slide 19*
  * County Codes for Schema Attendance File

* Validate Attendance File – *Slide 21*
  * Common Validation Errors
    * Attendance Errors
    * Group Attendance Errors
    * Signature Errors
    * Code Errors

Topics Covered

- Upload Attendance File – **Slide 38**

- Voucher Terminology – **Slide 39**

- Creating a Voucher – **Slide 40**

- Why Doesn't Attendance Appear on my Voucher – **Slide 52**
  - Items Not Ready to Bill

- Submitting a Voucher – **Slide 56**

- Cannot Submit Voucher: Problem of "Not Co-Signed" – **Slide 58**

- Print Voucher Summary – **Slide 65**

- Attendance Denied? How to Correct and Re-Bill – **Slide 69**
  - Delete Uploaded Attendance

- Voucher Listing Report – **Slide 74**

Review of Import Person with License Template

* All agency service providers need to imported into the CPSE Portal.

* Only use this upload for individuals that will **NOT** be logging into CPSE Portal.

* The agency can add multiple service providers at once by completing the template shown below. When complete, this template is imported and all service providers listed in the template will be added to the CPSE Portal..

	A	B	C	D	E	F	G	H
1	First Name	Last Name	NPI	ProviderSpecificID	Profession Code	NY License	License From Date	License To Date
2								
3								
4								
5								

Review of Import Person with License Template

* The columns in template are:
  * First Name (required)
  * Last Name (required)
  * NPI (must have NPI # or Provider Specific ID)
  * Provider Specific ID - ID to link therapist to another system when NPI isn't present
  * Profession Code (required) - use one of the values from the Profession Codes list
* The following fields are only required for professionals that are licensed through the NYS Office of Professions (OT, PT, SLP, etc.) For professionals that do not have a NY license (teachers, etc.), leave the columns blank.
  * NY License - For professionals that do not have a NY license (teachers, etc.), leave the column blank.
  * License From Date - Effective Starting Date of the license
  * License To Date - Expiration Date of the license

	A	B	C	D	E	F	G	H
1	First Name	Last Name	NPI	ProviderSpecificID	Profession Code	NY License	License From Date	License To Date
2								
3								
4								
5								

Portal Profession Codes

* The Portal Profession Codes must be entered on the template.

* The list of Professional Codes can be found in the Knowledge Base article below:

  * http://support.cpseportal.com/kb/a66/service-provider-user-template-to-import-therapists-and-users.aspx?KBsearchID=16175 or (search for "template")

The list of profession codes that can be used:

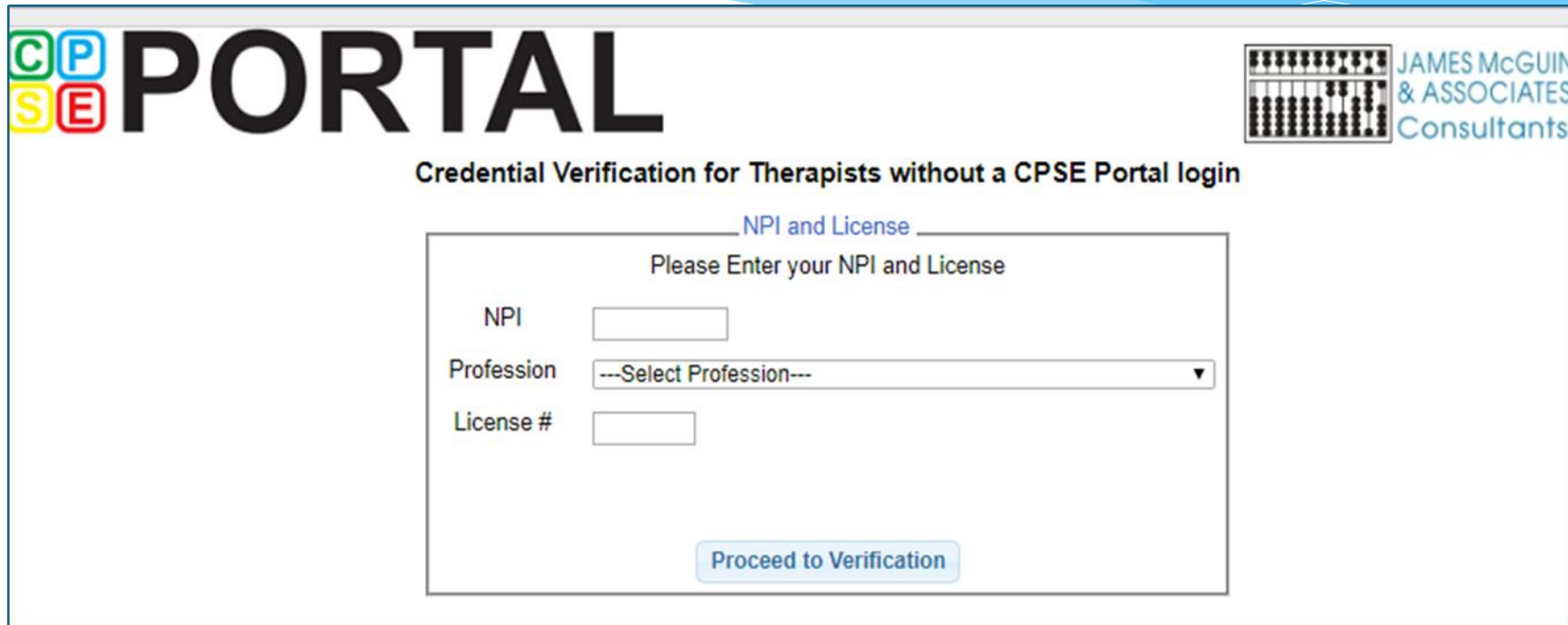| Profession Code	Description
AIDE	Classroom or 1:1 AIDE
AUD	Audiologist
CFY	Clinical First Year
COTA	Certified Occupational Therapist Assistant
CSP	Certified School Psychologist
CSW	Clinical Social Worker
INT	Bilingual Interpreter
LCSW	Licensed Clinical Social Worker
LMSW	Licensed Master Social Worker
LPN	Licensed Practical Nurse
MUS	Music Therapist
OT	Occupational Therapist (Registered)
OTA	Occupational Therapist Assistant
PSY	Licensed Psychologist
PT	Physical Therapist
PTA	Physical Therapist Assistant
RN	Registered Nurse
SLP	Speech & Language Pathologist
SPED	Special Education Teacher
TD	Teacher of the Deaf
TEACH	Teacher
TSHH	Teacher of Speech & Hearing Handicapped
TSLD	Teacher of Speech & Language Disabilities
TVI	Teacher of the Visually Impaired

Review of Credential Verification

* For most counties, only a licensed professional's credentials need to be verified.
* This includes SLP, OT, OTA, PT, PTA, LMSW, LCSW, etc. They can be found on http://www.op.nysed.gov/.

* Some counties require non-licensed professionals (teachers, school psychologists, etc.) to verify their credentials. Many non-licensed professionals do not have NPI numbers so it becomes only a name verification. Check with your county to see if non-licensed professionals need to verify their credentials.

* Individuals that are not licensed, but can work under the direction / supervision of a licensed professional. These include CFY, Limited Permit OT, Limited Permit PT, TSHH, TSSLD.

Who Can Complete the Verification Process?

* A licensed professional that does not have a login to CPSE Portal (because their agency uploads data from another system), can verify their own credentials using their NPI and license number.

* An agency can verify the credentials of any service provider that works for them.

Credential Verification for Therapists Without a Login

https://www.cpseportal.com/NonCPSEUserCredentialVerification/EnterCredentials.aspx

Credential Verification by Agency Office Staff

* Go to **People > Service Provider Credential Verification Listing**.

* Click "Verify" for the therapist needing to be 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

Credential Verification by Agency Office Staff

* The verification screen has three main sections:
  * The list of information from the service providers profile (name, NPI, license, etc.) that needs to be verified and attested that it is correct (upper left)
  * The information for their license as it appears on the NYS Office of the Professions website (right hand side)
  * The information from the National NPI Registry for their NPI (bottom left)
* Be sure to compare the two exactly, as you will be attesting that the information in the Portal is accurate.

Credential Verification by Agency Office Staff

* Once you have confirmed that all of the data is accurate and all of the "verify" boxes are checked, click "I attest."

* The prompt to enter your pin will then pop up. Your name and signature will auto-populate based upon your profile on CPSE Portal.

  * Enter pin and select "I agree."

* You will then see the confirmation underneath the verification.

Enter PIN

By entering my pin number, I/We certify that my NPI and license information are both up to date and correctly entered into the CPSE Portal.

Name: Example Signature
Signing As: Example Signature
NPI:
Date: 6/29/2018
Pin: ****
I agree.

ⓘ Credential verification confirmed

Credential Verification by Agency Office Staff

* If you get this message:

  ⚠ Your profile does not have a signature. Please edit your profile and enter your signature.

* This means, that you do not have your Signature Title and Credentials filled out. This does NOT have to do with the service provider you are verifying, but rather the agency admin.

* You will need to go to My Profile and add this in.

My Profile

Personal and Professional	User Information	Favorites ▾

Information in CPSE Database

Last Name   [Signature]

First Name   [Example]

NPI   [   ]

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

[Update]

Personal and Professional	User Information	Favorites ▾

Information in CPSE Database

Last Name   [Signature]

First Name   [Example]

NPI   [   ]

Signature, Title, and Credentials
(e.g.: Mary Brown, CCC-SLP)   [Example Signature, Executive Director]

[Update]

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.

Schema Attendance File

* A billing provider can create a schema file and upload it into the CPSE Portal instead of entering it directly.

* Below is the Knowledge Base article containing the schema information needed:
  * http://support.cpseportal.com/kb/a67/schema-for-attendance-file-upload.aspx?KBSearchID=17037

County Codes for Schema Attendance File

* The Schema Attendance File will also need a County Code.

* The full list of County Codes can be found at:
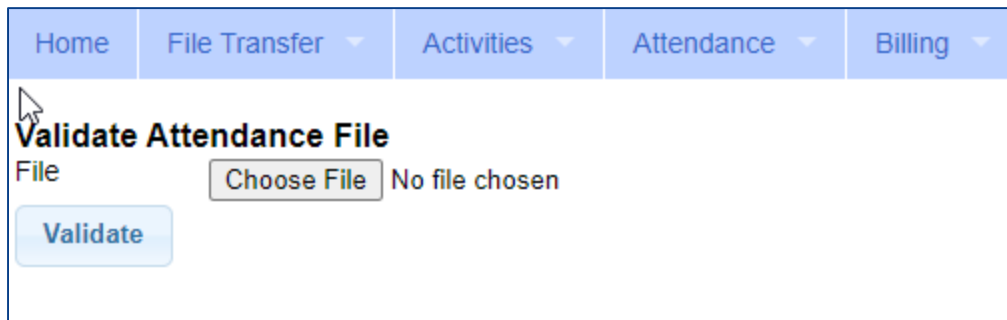   * http://support.cpseportal.com/kb/a82/county-codes.aspx

County Codes

CPSEPortal > Attendance Upload

SED County Codes
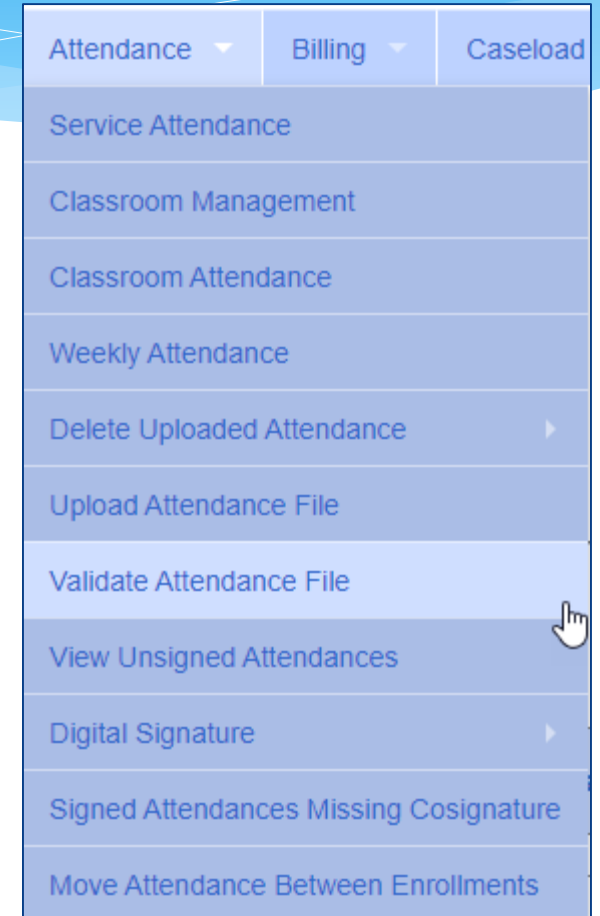
Code	County
01	ALBANY
02	ALLEGHANY
03	BROOME
04	CATTARAUGUS
05	CAYUGA
06	CHAUTAUQUA
07	CHEMUNG
08	CHENANGO
09	CLINTON
10	COLUMBIA
11	CORTLAND
12	DELAWARE
13	DUTCHESS
14	ERIE
15	ESSEX
16	FRANKLIN
17	FULTON
18	GENESEE
19	GREENE

Validate Attendance File

* Go to **Attendance > Validate Attendance File**

* Click Choose File, and find your file

* Now click Upload

Home	File Transfer	Activities	Attendance	Billing

Validate Attendance File
File [Choose File] No file chosen

[Validate]

Attendance	Billing	Caseload

Service Attendance

Classroom Management

Classroom Attendance

Weekly Attendance

Delete Uploaded Attendance

Upload Attendance File

Validate Attendance File

View Unsigned Attendances

Digital Signature

Signed Attendances Missing Cosignature

Move Attendance Between Enrollments

Common Validation Attendance Errors

* Service Provider does not exist in database:
  * *The therapist is not in the Portal. Add therapist to the Portal.*

* CoVisit therapist does not exist in database:
  * *The CoVisiting therapist is not in the Portal. Add CoVisiting therapist to the Portal.*

Common Validation Attendance Errors

* There is more than one attendance with the same attendance ID:
  * *Check ESID # listed to see if duplicate attendance exists.*

Errors and/or warnings were encountered during validation process.

Validate Attendance File
File [Choose File] No file chosen

[Validate]

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012397	3/16/2021	1906424	There is more than one attendance with the same attendance ID.	2100	1906424
CBRS2021W0011624	3/18/2021	1906424	There is more than one attendance with the same attendance ID.	2100	1906424

* Electronic Service ID does not exist in CPSE Postal:
  * *Check the Portal to see if the County has uploaded the child to the Portal. Also check to see if the ESID # of the child matches the County record.*

Errors and/or warnings were encountered during validation process.

Validate Attendance File
File [Choose File] No file chosen

[Validate]

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W001283M	3/15/2021	1906424	Electronic Service ID does not exist in CPSEPortal.	2200	CBRS2021W001283M

Common Validation Attendance Errors

* Attendance does not fall within enrollment date range:
    * *Attendance is outside of the enrollment dates. Check the attendance dates.*

Errors and/or warnings were encountered during validation process.					
Validate Attendance File					
File Choose File No file chosen					
Validate					
Electronic Service ID	**Service Date**	**Attendance ID**	**Message**	**Error#**	**Data causing error**
CBRS2021W0012942	3/16/2020	1907076	Attendance does not fall within enrollment date range.	2600	

* Specified Service Setting in not valid:
    * *Check the Service Setting of the attendance date listed. The Service Setting should match the IEP.*

Errors and/or warnings were encountered during validation process.					
Validate Attendance File					
File Choose File No file chosen					
Validate					
Electronic Service ID	**Service Date**	**Attendance ID**	**Message**	**Error#**	**Data causing error**
CBRS2021W0012942	3/16/2021	1907076	Specified Service Setting is not valid.	2700	Setting entered: Invalid Room

Common Validation Attendance Errors

* Future attendance is not allowed for County:
  * *Check attendance and remove future attendances listed.*

Errors and/or warnings were encountered during validation process.					
Validate Attendance File					
File	Choose File	No file chosen			
Validate					
Electronic Service ID	**Service Date**	**Attendance ID**	**Message**	**Error#**	**Data causing error**
CBRS2021W0011993	3/15/2021	1906156	Future attendance is not allowed for county: 26.	2701	
CBRS2021W0011668	3/15/2021	1906154	Future attendance is not allowed for county: 26.	2701	

* This County does not allow weekend attendance to be entered:
  * *Check attendance and remove all attendances on weekend dates listed.*

Errors and/or warnings were encountered during validation process.					
Validate Attendance File					
File	Choose File	No file chosen			
Validate					
Electronic Service ID	**Service Date**	**Attendance ID**	**Message**	**Error#**	**Data causing error**
CBRS2021W0011993	3/14/2021	1906156	This county does not allow weekend attendance to be entered.	2702	
CBRS2021W0011668	3/14/2021	1906154	This county does not allow weekend attendance to be entered.	2702	

Common Validation Attendance Errors

* User does not have access to service or service does not exist in CPSE Portal:
  * *Check Portal to ensure that the County has uploaded the service to the Portal.*

Errors and/or warnings were encountered during validation process.

Validate Attendance File
File   Choose File   No file chosen

Validate

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0012764
CBRS2021W0012397	3/16/2021	1907305	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0012397
CBRS2021W0011624	3/18/2021	1908785	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0011624
CBRS2021W0012418	3/18/2021	1909252	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0012418
CBRS2021W0012066	3/18/2021	1908964	User does not have access to service, or service does not exist in CPSEPortal.	2201	CBRS2021W0012066

* Invalid time entered. Time in must be before time out:
  * *Correct "time in" on attendance.*

Errors and/or warnings were encountered during validation process.

Validate Attendance File
File   Choose File   No file chosen

Validate

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	Invalid time entered. Time in must be before time out.	2703	

Common Validation Attendance Errors

* Specified Progress is not valid:
  * *Check attendance and correct progress.*

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012942	3/16/2021	1907076	Specified Progress is not valid.	2704	Invalid

* There is not a classroom entered for SED Program Code 9100 for ESID #:
  * *Assign CB child to classroom in the Portal.*

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CB2021W0047274	2/22/2021	1	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	
CB2021W0047274	2/23/2021	2	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	
CB2021W0047274	2/24/2021	3	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	
CB2021W0047274	2/25/2021	4	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	
CB2021W0047274	2/26/2021	5	There is not a classroom entered for SED Program Code 9100 for Electronic Service ID CB2021W0047274	2500	

Common Validation Attendance Errors

* There already exists a duplicate/overlapping attendance on 3/15/2021 for ESID #........:
  * *Check Portal attendance for date given in error message. The attendance has already been uploaded and you are uploading a duplicate attendance for that day.*

* The file contains a duplicate/overlapping attendance on 3/16/2021 for ESID #......:
  * *Check your file for ESID # and delete any duplicate attendance on the date given in error message.*

Common Validation Group Attendance Errors

* You have added a group session to an invalid enrollment:
  * *Check enrollment to ensure that the group session is on a group ESID # and not an individual ESID enrollment.*

* The enrollment is for a group session, but Number Of Children In Group was not specified:
  * *Add # of children to group session.*

Common Validation Group Attendance Errors

* The enrollment is for a group session, but attendance is missing the group identifier:
    * *Check attendance and enter group identifier.*

Errors and/or warnings were encountered during validation process.
Validate Attendance File
File   Choose File No file chosen
Validate

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012764	3/15/2021	1906424	The enrollment is for a group session, but attendance is missing the group identifier.	2401	

* Attendance Group # contains attendance that says number of children in group is 1. Expecting at least 2:
    * *Check group attendance, as there must be at least 2 children chosen with possibly one child marked as absent.*

Errors and/or warnings were encountered during validation process.
Validate Attendance File
File   Choose File No file chosen
Validate

Electronic Service ID	Service Date	Attendance ID	Message	Error#	Data causing error
CBRS2021W0012066	3/16/2021	1907316	Attendance Group 3195515878 contains attendance that says number of children in group is 1. Expecting at least 2.	2402	

Common Validation Group Attendance Errors

* Attendance group contains attendance with date of service different than group or times different than group:

  * *Check all times and dates of service for children in group and make sure they are the same date & time.*

* Attendance Group contains attendance with enrollment type CBRS. Expecting RS.

Common Validation Group Attendance Errors

* Attendance Group contains attendance with service type OT1. Expecting PT1.

* Attendance Group contains more than 5 attendances. This is not allowed.
  * *Group attendance cannot be more than 5 students.*

Common Validation Group Attendance Errors

* Attendance Group contains attendances that indicate differing numbers of children in group. They must all match:

    * *Check each attendance for children in group for specific date. All attendances for that group session must contain the same number of children.*

Common Validation Signature Errors

* Digital signature signed therapist identifier does not match service provider for attendance.

  * *Check identifier for therapist who signed attendance for this service.*

Errors and/or warnings were encountered during validation process.					
Validate Attendance File					
File Choose File No file chosen					
Validate					
Electronic Service ID	**Service Date**	**Attendance ID**	**Message**	**Error#**	**Data causing error**
CBRS2021W0012942	3/16/2021	1907076	Digital signature signed therapist identifier does not match service provider for attendance.	3000	

* Digital cosignature signee does not exist in database.

  * *Check Portal and verify that the therapist cosigning session notes is in the Portal.*

Errors and/or warnings were encountered during validation process.					
Validate Attendance File					
File Choose File No file chosen					
Validate					
Electronic Service ID	**Service Date**	**Attendance ID**	**Message**	**Error#**	**Data causing error**
CBRS2021W0012942	3/16/2021	1907076	Digital cosignature signee does not exist in database.	3001	Type:NPI / Value:1508419000

Common Validation Signature Errors

* External signature OR cosignature signature OR QA signature signee does not exist in database:

Common Validation Code Errors

* CPT Code does not exist in CPSE Portal:

    * Check CPT Code entered on attendance, and change if necessary. If CPT Code is correct, then contact the CPSE Portal help desk at **support@CPSEPortal.com**.

* No ICD Code entered for this attendance:

    * *Check attendance service date of ESID #, and enter ICD Code.*

Common Validation Code Errors

* ICD Code does not exist in CPSE Portal. Contact your county representative if you believe it should be added:
  * *Contact the County*

Upload Attendance File

* To upload your Schema Attendance File, go to **Attendance > Upload Attendance File**

* Click Choose File, look for your file, and click Upload

Attendance ▼	Billing ▼	Caseload

Service Attendance

Classroom Management

Classroom Attendance

Weekly Attendance

Delete Uploaded Attendance ▶

Upload Attendance File

Validate Attendance File

View Unsigned Attendances

Digital Signature ▶

Signed Attendances Missing Cosignature

Move Attendance Between Enrollments

Home	File Transfer ▼	Activities ▼	Attendance ▼	Billing ▼

Upload Attendance File
File   [Choose File] No file chosen

[Upload]

Voucher Terminology

* **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.

* **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".

Creating a Voucher

* When ready to bill, you will need to create your voucher.

* Go to **Billing > Voucher Management**

* Click "Create Voucher"

Billing ▼	Caseload Mainter
Items Not Ready To Be Billed	
Voucher Management	
Submit Voucher(s)	
Print Voucher Summary	
Voucher Listing	

Recalc All   Create Voucher

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 [▾]

Creating a Voucher

* Once you select the previous filters, then the additional options will open up.

* Under the "RS" enrollment type, is the option to choose a specific service type which make the voucher be ONLY for that service type.

* By leaving the related service code blank, the vouchers may be submitted with mixed services.
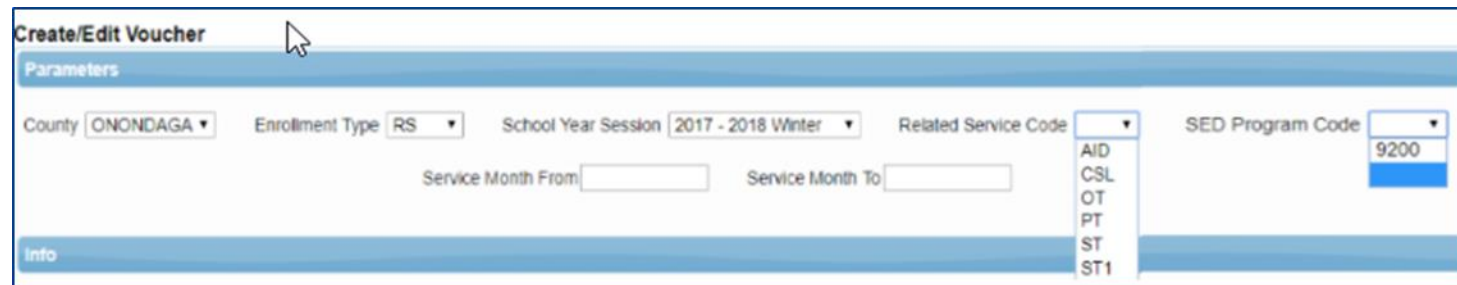
Create/Edit Voucher

Parameters

County [SCHENECTADY ▼]   Enrollment Type [RS ▼]   School Year Session [2019 - 2020 Winter ▼]   Related Service Code [▼]   SED Program Code [▼]

Service Month From [   ]   Service Month To [   ]

Creating a Voucher

* **Voucher for RS or CBRS:**

* Related Services - can be billed by individual service (I.E. – all speech) by selecting the Related Service Code or you can bill all related services together by leaving the Related Service Code blank.

* Center Based Related Services (CBRS) - will be grouped together under the SED Program Code that you choose. 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.
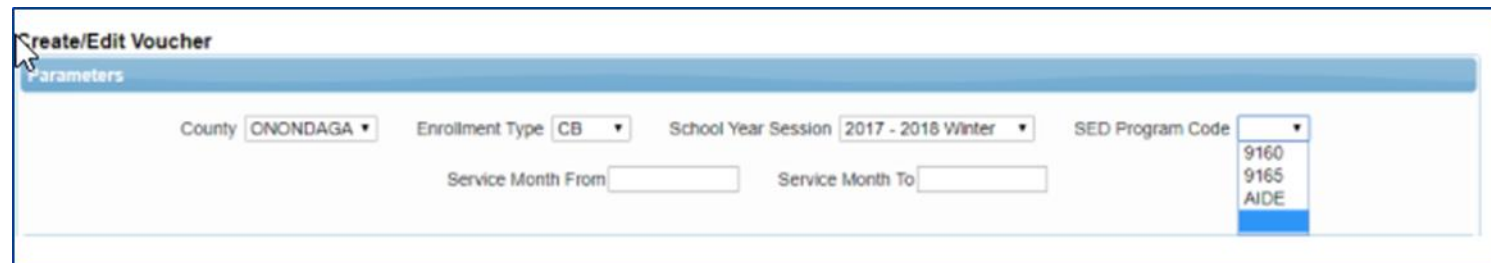
Creating a Voucher

* **Voucher for CB, AIDE and SEIT:**
* Center Based program (CB) - students will be grouped together under the SED Program Code that you choose (I.E. – all 9160 students will be billed together).
* Also, CB programs can be billed with no attendances, but most counties require attendance. You should follow your county's rules.
* AIDE – separate AIDE enrollments will be created by the county. When billing, all students receiving AIDE services will be grouped together.
* SEIT – all students receiving SEIT will be grouped together.
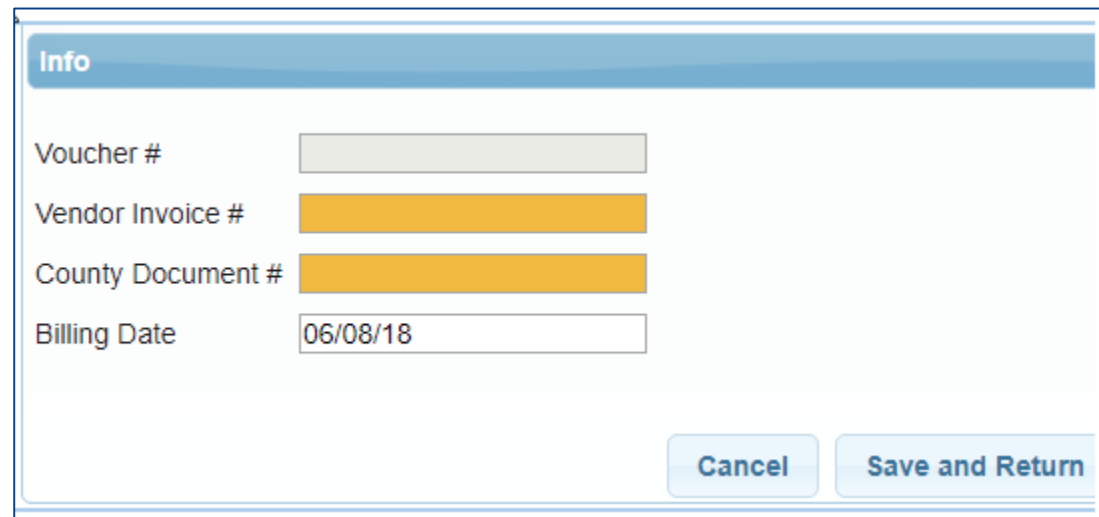
Create/Edit Voucher

Parameters

County ONONDAGA ▼   Enrollment Type CB ▼   School Year Session 2017 - 2018 Winter ▼   SED Program Code ▼

Service Month From [ ]   Service Month To [ ]

9160
9165
AIDE

Creating a Voucher

* Voucher numbers are auto-assigned.

* The Vendor invoice Number is how you as the agency might identify the Voucher.

* The County Document # is how the County might identify the Voucher (for example a pre-printed County specific numbered Voucher).
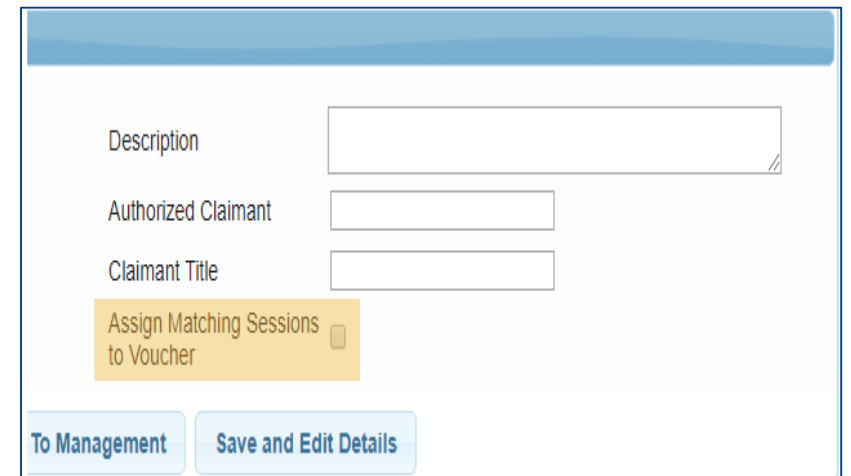
Info	
Voucher #	
Vendor Invoice #	
County Document #	
Billing Date	06/08/18

Cancel   Save and Return

Creating a Voucher

* 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 individually.
* These may be unassigned if you do not wish to apply, this is just to skip a step in assigning attendances to a Voucher.
* The description is how you can identify the voucher (I.E.- May 2021 SEIT)
* Authorized Claimant – for independent provider this is the therapist. For agency this is the billing admin.
* Claimant Title – title of claimant (ex. President)
* Click Save and Return to Management

Description

Authorized Claimant

Claimant Title

Assign Matching Sessions to Voucher

To Management   Save and Edit Details

Creating a Voucher

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

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.

Billing ▼	Caseload Mainter
Items Not Ready To Be Billed	
Voucher Management	
Submit Voucher(s)	
Print Voucher Summary	
Voucher Listing	

Pending Vouchers

Voucher #	Bill Date	Type	County	Session	Description	Enroll. Count	Total Billed				
RS150428091653	4/7/2015	RS	SCHENECTADY	2014 - 2015 Winter	RS Jan Feb March 2015	39	$9,405.00	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"

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

Assigned

	Last Name	First Name	Service Month	Sessions	Amount Billed	ESID
☐	ALMAN	Adley	September 2015	5	$275.00 (R)	RS1516W0018372
☐	ALMAN	Adley	September 2015	5	$275.00 (R)	RS1516W0018484
☐	ANTAKI	ZANI	September 2015	6	$330.00 (R)	RS1516W0017894
☐	DINH	Keysy	September 2015	5	$275.00 (R)	RS1516W0018486
☐	DINH	Keysy	September 2015	3	$165.00 (R)	RS1516W0018507
☐	EMANUEL	Zissel Devora	September 2015	3	$165.00 (R)	RS1516W0018092
☑	FUGATE	Keylen	September 2015	3	$165.00 (R)	RS1516W0018105
☐	GANGI	Quatese	September 2015	4	$220.00 (R)	RS1516W0018581
☐	GODOY	Nyla-Rae	September 2015	5	$275.00 (R)	RS1516W0018142

<-- Unassign

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

| Return to Voucher Management | Recalc | Save | | Amount Billed: $9,495.00 |

Why Doesn't Attendance Appear on my Voucher?

* There are several reasons why attendances are not available to be put on a voucher and therefore do not appear on the list of items to put on a voucher on the Voucher Details screen. Here are the primary 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** -> 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.
  * **A prescription has not been uploaded to the enrollment**

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 missing CPT or ICD Codes

Items Not Ready to Bill

* Complete filters needed to sort attendances by provider, month or enrollment type.

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.

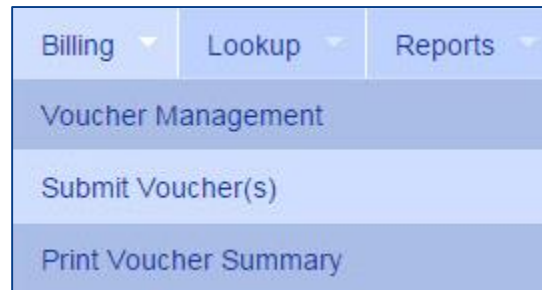## Items Not Ready To be Billed

Filters

Provider:	GEBAUER,BETTY		County	SCHENECTADY
School Year Session:	2019 - 2020 Winter	Service Month From:	Service Month To:	
Enrollment Type: RS	Service Type:	Program Code:		Retrieve

Last Name	First Name	ServiceProvider	DOB	ESID	From	To	Month	Service Dates	Problem	Service Type	Frequency	Sessions	Amount	
CHERRY	YONG	HOFFMAN, KRISTEN	04/15/15	RS1920W0015042	11/20/19	06/26/20	Mar 2020	3/4, 3/11	Not signed	ST1 (Grp)	1x30	2.00	$103.00	Attendances
CHERRY	YONG	HOFFMAN, KRISTEN	04/15/15	RS1920W0015043	11/20/19	06/26/20	Mar 2020	3/2, 3/6, 3/9	Not signed	ST (Indv)	1x30	3.00	$154.50	Attendances
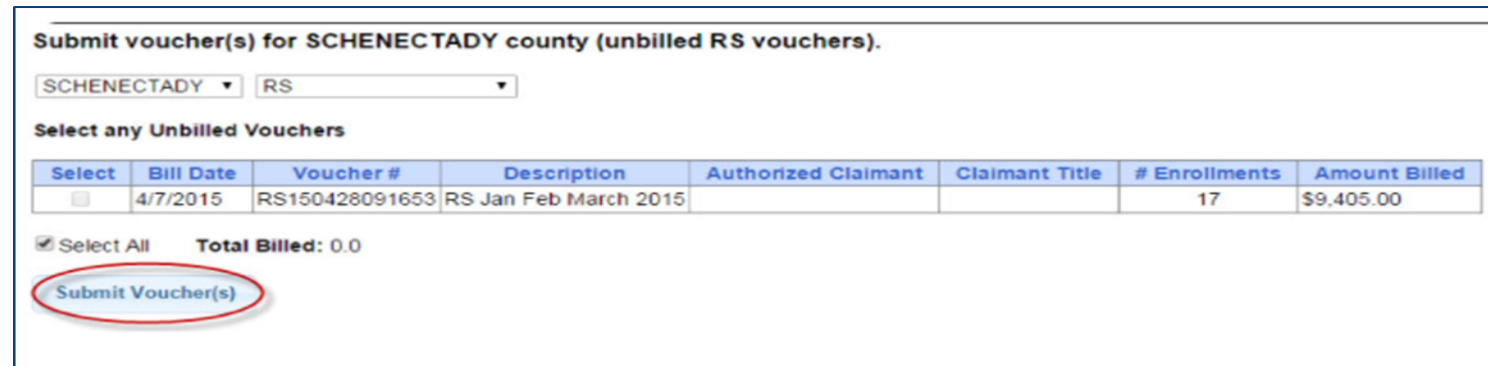
Submitting a Voucher

* To submit voucher(s) to county, go to **Billing > Submit Voucher(s).**

* Select unbilled voucher by checking box (or Select All).

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".

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.

Provider Name:

Username:

Name & Title:

Pin

I agree.

NOTE: Once you submit a voucher to the county, it is NO longer possible to edit it's 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.

Cannot Submit Voucher:
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 (Indv)	1x30	Not Co-Signed	Attendances
			9/4/2019	6/26/2020	ST (Indv)	1x60	Not Co-Signed	Attendances
			1/2/2020	6/26/2020	ST (Indv)	2x30	Not Co-Signed	Attendances
			1/2/2020	6/26/2020	ST (Indv)	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	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	
02/04/20			1:30 PM	2:00 PM	30	1.00	30	Shannon Stark	Home	I	03/13/20	03/13/20	Test 1234	Treatment Log
03/05/20			11:00 AM	11:30 AM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/06/20			2:45 PM	3:15 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/09/20			4:30 PM	5:00 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/10/20			1:30 PM	2:00 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/12/20			11:00 AM	11:30 AM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/13/20			2:45 PM	3:15 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
03/16/20			4:30 PM	5:00 PM	30	1.00	30	Shannon Stark	Home	I	04/10/20	04/10/20	Test 1234	Treatment Log
04/01/20			12:00 PM	12:30 PM	30	1.00	30	Shannon Stark	Home	I	05/11/20		Test 1234	Treatment Log
04/03/20			12:00 PM	12:30 PM	30	1.00	30	Shannon Stark	Home	I	05/11/20		Test 1234	Treatment Log

Cannot Submit Voucher:
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**. If you look at the previous screenshot, all of the attendances through March had this date auto-fill, but starting in April this was no longer 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.

Cannot Submit Voucher:
Problem of "Not Co-Signed"

* Step 1:

* There are two ways for the credential dates to be updated:

* You, as the agency administrator can make the correction:
  * Go to **People -> Service Provider Credential Listing**.
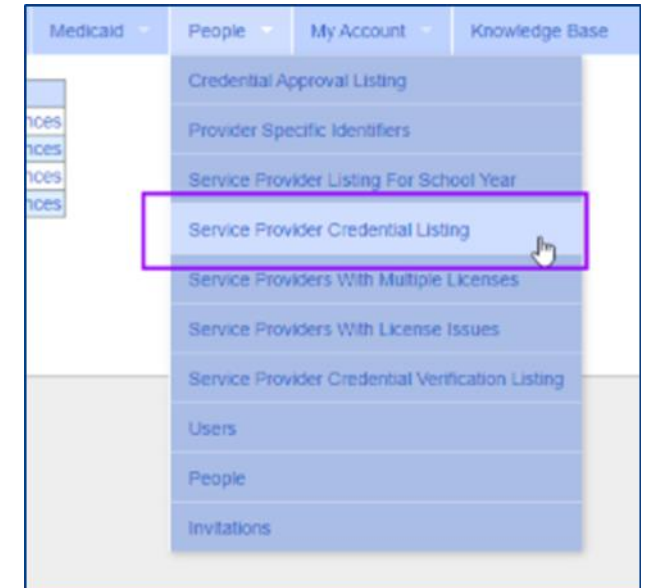
Cannot Submit Voucher: Problem of "Not Co-Signed"

* 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 03/31/20.

* If you have the option of "Edit," you will be able to correct this yourself.

* If you only see "View," then you will **not** be able to make the correction to their account as they are in the CPSE Portal working with multiple agencies. Contact the CPSE Portal Support Team at: **support@CPSEPortal.com**, and we will make the necessary changes for you.

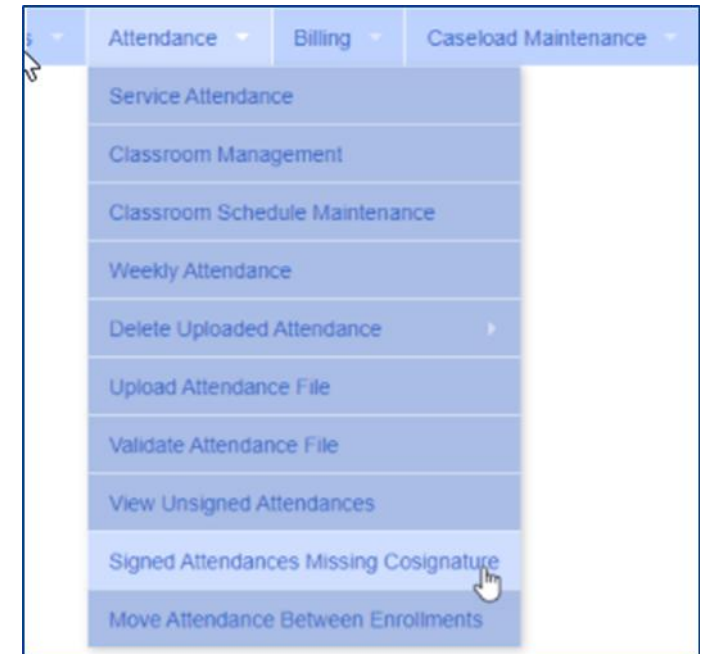# Cannot Submit Voucher:
Problem of "Not Co-Signed"

* 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 by following the instructions on the previous webinar slides or click on the link below.

  * http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx?KBSearchID=14295

Cannot Submit Voucher: 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**

Cannot Submit Voucher:
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.

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

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

Billing ▾	Caseload Mainter
Items Not Ready To Be Billed	
Voucher Management	
Submit Voucher(s)	
Print Voucher Summary	
Voucher Listing	

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 Sesssion: (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	Betty P. Gebauer	SCHENECTADY	22	Print
RS200308133622	RS	FEBRUARY 2020	3/8/2020	$2,926.00	3/8/2020	CCC-SLP	Betty P. Gebauer	Albany	11	Print
RS200213143706	RS	JAN. 2020	2/13/2020	$3,993.00	2/14/2020	CCC-SLP	Betty P. Gebauer	Albany	10	Print
RS200205073831	RS	JAN. 2020	2/5/2020	$5,620.50	2/9/2020	CCC-SLP	Betty P. Gebauer	SCHENECTADY	22	Print
RS200102193725	RS	DEC. 2019	1/2/2020	$2,486.00	1/4/2020	CCC-SLP	Betty P. Gebauer	Albany	9	Print

Print Voucher Summary

* You will then see voucher summary:

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 with the CB Voucher.

Attendance Denied?
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**

Attendance Denied?
How to Correct and Re-Bill

* Example of form:

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

IMG1: Example of form to be completed

Attendance Denied?
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/unsigning-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 or was rescinded, 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.

Delete Uploaded Attendance

* You can delete either your attendance file or a single attendance.

* To delete your attendance file go to **Attendance > Delete Uploaded Attendance** and choose By File
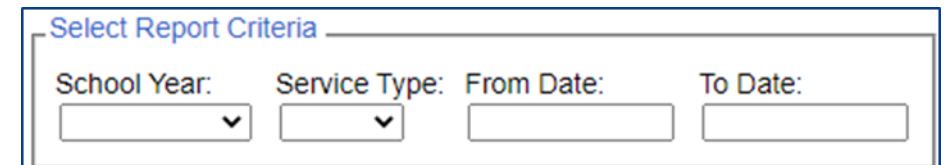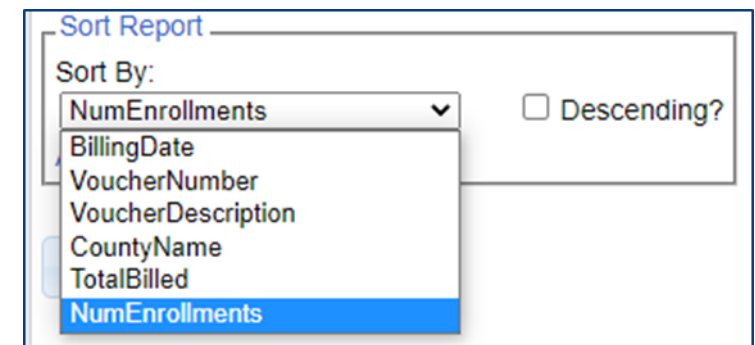
Delete Uploaded Attendance

* To delete a single attendance, go **to Attendance > Delete Uploaded Attendance** and choose Search

* You can search by ESID and date of attendance needed.

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.

Voucher Listing Report

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

Helpful Knowledge Base Articles

* **Import Person with License Template**
  * http://support.cpseportal.com/kb/a126/import-person-with-license-template.aspx?KBSearchID=17027

* **Credential Verification for Agencies**
  * http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx

* **Credential Verification for Providers with NO CPSE Portal Login**
  * http://support.cpseportal.com/kb/a151/credential-verification-no-cpse-portal-login.aspx

* **Uploading & Troubleshooting Prescription Documentation**
  * http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=17071

* **Schema for Attendance File Upload**
  * http://support.cpseportal.com/kb/a67/schema-for-attendance-file-upload.aspx?KBSearchID=16987

* **County Codes**
  * http://support.cpseportal.com/kb/a82/county-codes.aspx

Helpful Knowledge Base Articles

* **Creating & Submitting a Voucher**
  * http://support.cpseportal.com/kb/a62/creating-and-submitting-a-voucher.aspx?KBSearchID=17039
* **Attendance Denied? How 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=17075
* **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
* **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
* **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

Follow-Up

* This presentation will be recorded and the PowerPoint presentation will be uploaded to the Portal Knowledge Base for future reference.

* Search for help in our **Knowledge Base**: http://support.cpseportal.com/main/default.aspx

* Email the **CPSE Portal Support Team**: support@CPSEPortal.com