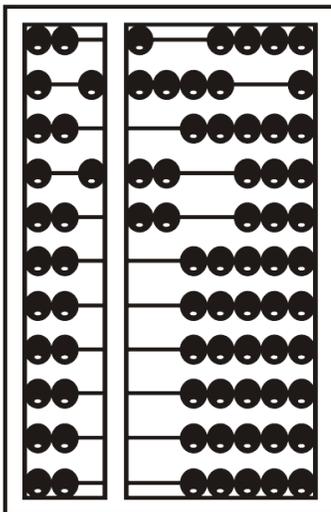


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Digital Speech Recommendations For SLPs

(Updated September 2021)

PURPOSE OF WEBINAR

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

- ❑ Discuss the benefits of creating a Digital Speech Recommendation
- ❑ Show you how to create the Digital Speech Recommendation
- ❑ Compare the pros/cons of both options (digital and paper)

ROCKLAND COUNTY EXPECTATIONS FOR SPEECH PRESCRIPTIONS

- ❑ The county is expecting providers to upload prescriptions for **ALL** children – **Not just Medicaid children.**
- ❑ As of **September 1, 2021** providers will not be able to submit billing for services that do not have an uploaded prescription.
(That means all SLPs will have to upload a paper prescription for any September services. A webinar was conducted on September 20, 2021 showing how to upload prescriptions.)
- ❑ Beginning **October 1, 2021**, the county is expecting SLPs to use the **Digital Speech Recommendation** feature in the Portal for **new children** or **changes in service.**
- ❑ The county will no longer be requiring providers to submit a hard copy of the prescription.

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/Demonstration
- 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 YOU PREPARE YOUR 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

(Why is the county mandating digital recommendations?)

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

(Why is the county mandating digital recommendations?- 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 template automatically when the "**Create Speech Recommendation**" link is activated; **with just one click most of the recommendation is already completed!**
- ✓ Only 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 the one-time set-up is not completed 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>My Profile)

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

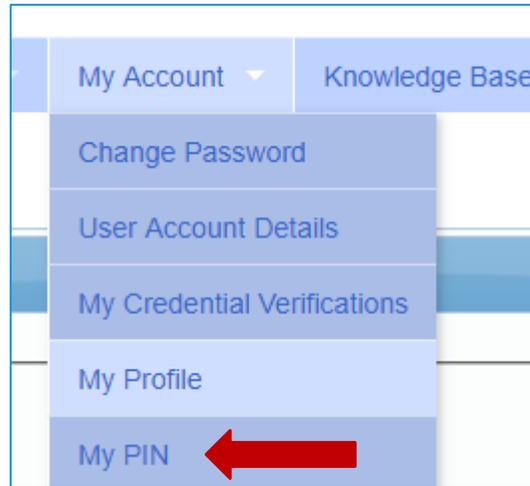
Credentials

Mailing Address 1

Mailing Address 2

City State Zip

PIN FOR DIGITAL SIGNATURES



(My Account>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

(My Account>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** prescriptions.)*

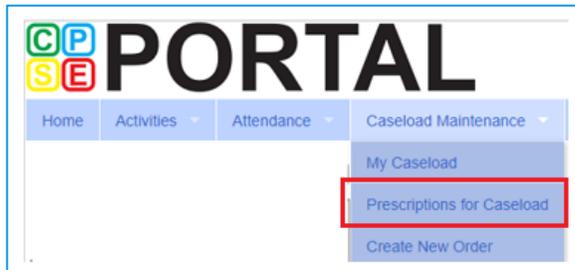
2) **“Create New Order”** under the Caseload Maintenance Menu.

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.)*

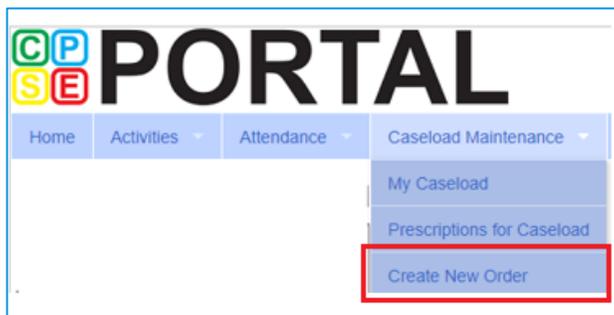
TWO WAYS TO ACCESS THE DIGITAL ORDER SCREEN

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 *that do not have a written order uploaded*, 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. The SLP 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

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 a web form titled "Create Digital Order". At the top, there is a "Child Lookup" section with fields for "BAXTER, DAVIDA", "County: SCHENECTADY", "District: Schenectady", and "DOB: 10/8/2014", along with a "Redo Search" button. Below this is a "Create recommendation for Speech Services" section with a dropdown menu set to "THERAPY". Underneath is a "Prescription effective date range" section with three radio button options: "Applies to entire school year" (selected), "Applies to specific school year / session", and "Applies to specific date range". The "Applies to entire school year" option has a dropdown menu set to "2018 - 2019". Below that is a "Reason for Services" section with an "ICD" field containing "F80.2 F80" and a "Reason" text area. At the bottom is a "Preview and Sign" button. Red arrows point to various parts of the form with text annotations: "Fills in automatically." points to the "Redo Search" button and the "THERAPY" dropdown; "Defaults to 'Applies to Entire School Year, but you can select the other options.'" points to the selected radio button and its dropdown; "Type in the ICD Code(s)." points to the "ICD" field; and "Click Preview and Sign" points to the "Preview and Sign" button.

* **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, sstark. You are currently logged in for **Shannon Stark** (Logout) **JAMES MCGUINNESS & ASSOCIATES** 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 | ICD Description |
|----------|-----------------------|
| F60.0 | Phonological disorder |

Provider Contact Information

Name: PROGRESSUS THERAPY, LLC
Phone Number: 5185551111
Address 1: 123 Main Street
Address 2:
City: Albany **State:** NY **Zip:** 12245

Licensed Speech and Language Pathologist Information

Name: Stark, Shannon
NPI: 1003129438
License: 010654

Digital Signature

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

Digitally Sign

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

Signature: Shannon Stark, M.A. CCC/SLP
NPI: 1003129438
Date: 1/14/2019

Pin: **Enter PIN #**

I agree. **Click I AGREE**

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

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REQUIRED ELEMENTS OF A WRITTEN ORDER

CPE 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**

© James McGuinness & Associates

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:

- **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?

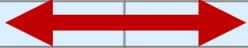
- From *Prescriptions for Caseload* (**Initial** Prescriptions Only)
- From *Create New Order* (**Subsequent** Prescriptions)

Demonstration Follow-up

Links – Prescriptions for Caseload

- ❑ After the initial prescription has been successfully created, the links in the **Rx Entry** & **Rx Image** Columns will change to “**View.**” You can click the “**View**” link to view and/or print the recommendation.

You will also notice that the last column no longer shows the “**Create Speech Recommendation**” link. The column is blank.

| 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 |

- ❑ If the student needs an subsequent (additional) prescription, it can be entered from Caseload Maintenance > **Create New Order.**
- ❑ A digital recommendation will be required for each Speech ESID # in the Portal.
(e.g., if a child has an enrollment for Individual & Group, two digital orders will be required.)

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 as **“View.”**
- If you click on the **“View”** link in either column, you will be able to **view or print** the digital speech recommendation.

Link is removed when the INITIAL 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 | Blank |
| 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

This information also shows up Under **Prescription Entry Maintenance>Image Tab**

- 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 spelling of the child’s name, different DOB or service dates), the unmatched record will not be able to be matched to the official enrollment.)

| | | | | | | | | | | | | |
|------|---------------|------------|--------|------------|---------|-----------------------------|--------|---------|----------|--------|------------|----------------|
| 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 | Enrollments | Attempt Match | Edit | Delete |
|-----------|------------|----|-----|--------|----------|----------|------|-------|-----|-----------|-------------|---------------|------|--------|
| | | | | | | | | 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 grid (Session, Enrollment Type, Etc.) **below**.
- 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"/> | Weekly | <input type="button" value="Add"/> |

Fill in all the pertinent information > click Add

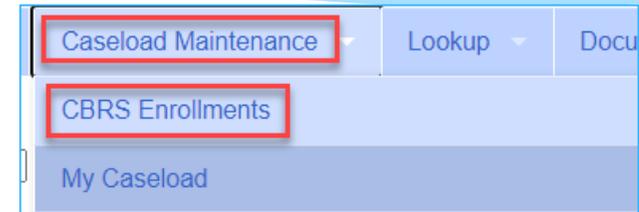
Demonstration

- 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**

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

| 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 | |

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.*

Last Webinar Training

Medicaid-Compliant Written Orders

Our next webinar, **Medicaid-Compliant Written Orders**, will be held on **9/30/21** at **10:00 & 2:00**.

- **10:00 AM** – <https://attendee.gotowebinar.com/register/7798097521365718798>
- **2:00 PM** – <https://attendee.gotowebinar.com/register/1709904825788819216>

This webinar is ***highly recommended*** for providers that obtain prescriptions from a medical practice (OT/PT).

This webinar will cover the following topics:

- *Required elements of a Medicaid Written Order,*
- *What you should be checking to ensure a verified order,*
- *The valid vs. invalid way to express the eight required items on your prescription,*
- *When a new order is required,*
- *How to make corrections on Medicaid documentation,*
- *Electronic/digital signatures and attestations,*
- *Links that will assist you with Medicaid compliance.*
- *Benefits of using the Digital Speech Recommendation,*
- *A side-by-side comparison of the digital option verses the handwritten paper option.*

ALL WEBINARS ARE RECORDED AND CAN BE VIEWED AT ANY TIME (DAY OF EVENING).

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