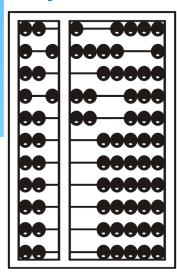# Classroom Attendance

Classroom Attendance

* For children in a Center Based classroom program, their presence is recorded as present or absence.
  * There is no distinction between why they were not present.
  * No additional information is entered (times, activities, progress, etc.).
  * Your agency can create a school schedule that will grey out the days when school is closed.

* However, their services Center Based Related Services (OT, PT, etc.) are recorded with detailed entries.

Entering Classroom Attendance

* Go To *Attendance -> Classroom Attendance*

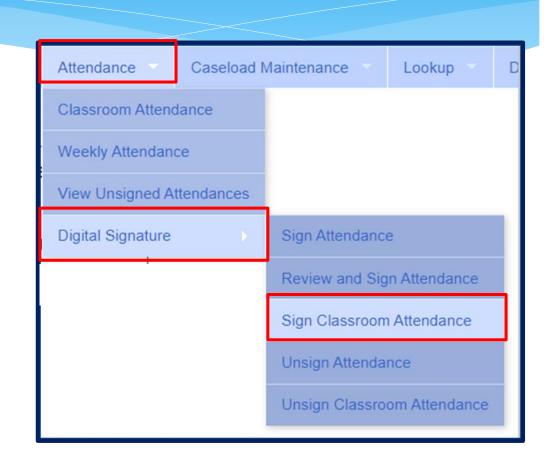* Click on "*Attendance*" to the right of the classroom.

Entering Classroom Attendance

* If a child is present single click on the day and it will be highlighted in green. Green indicates child was present for that day.

* If the child was absent double click on the day and it will change to the color Red. Red indicates the child was absent for that day.

* If school was closed, the date of the closure will be greyed out.

Current Week

| <-- | 03/06/22 | - | 03/12/22 | --> |

Enrollment	Mon ☑	Tue ☑	Wed ☑	Thu ☑	Fri ☑
	03/07/22	03/08/22	03/09/22	03/10/22	03/11/22
1/03/22-6/24/22 (CB2122W0009637)	signed	signed	signed	signed	signed
9/02/21-6/24/22 (CB2122W0009481)	signed	signed	signed	signed	signed
9/20/21-6/24/22 (CB2122W0009461)	signed	signed	signed	signed	signed
9/02/21-6/24/22 (CB2122W0009629)	signed	signed	signed	signed	signed

Total Sessions: 20

Signing Classroom Attendance

* Go to **Attendance > Digital Signature > Sign Classroom Attendance**

Attendance ▾	Caseload Maintenance ▾	Lookup ▾	D

Classroom Attendance

Weekly Attendance

View Unsigned Attendances
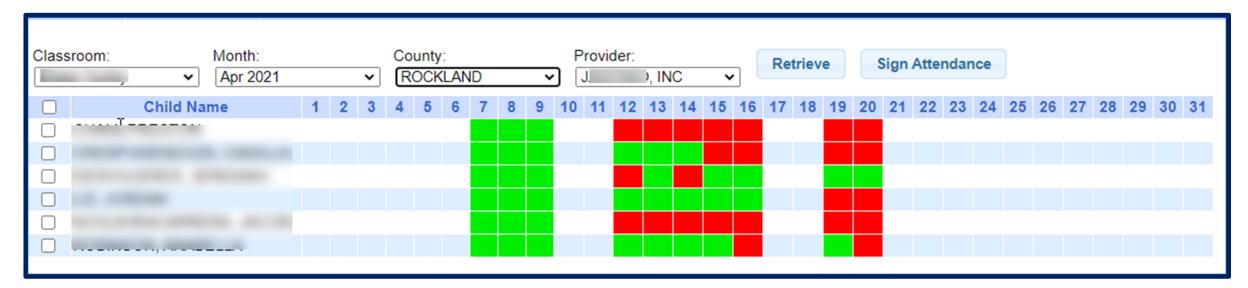
Digital Signature ▸

Sign Attendance

Review and Sign Attendance

Sign Classroom Attendance

Unsign Attendance

Unsign Classroom Attendance

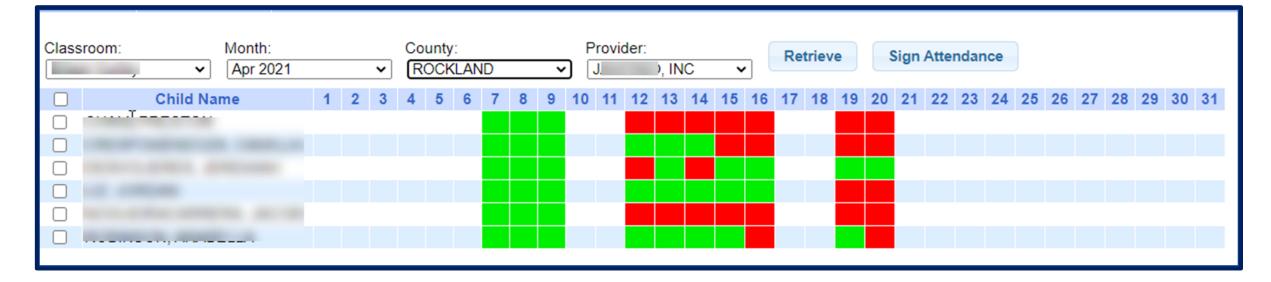# Signing Classroom Attendance

* This screen shows the attendance you need to review/edit/sign for.

* You can filter by a classroom, month, the county and provider.

* Once you have selected your filter, hit "*Retrieve*".

Signing Classroom Attendance

* Teachers can delete attendances but you cannot add them on this screen before your sign your attendances.

* First, select the attendances you wish to sign for by clicking the box next to each name.

* Once you have reviewed/edited your attendance, click on "*Sign Attendance*".

* Read the agreement, enter your pin and click "I agree."

Attendance Entry / Record

Attendance Entry/Record

For SEIT, fee for Related Services or Related Services as part of a Center Based classroom tuition program, the Attendance Entry or Attendance Record contains:

* Child
* Service Type
* Individual vs. Group
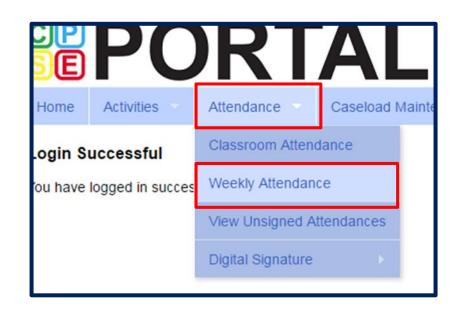* Date of Service
* Time In/Time Out
* Co-Visit with Supervisor
* Setting

* Location
* Entry Type: Provided, Missed or Make-Up
* ICD 10 Codes
* CPT Codes
* Does Not Meet Medicaid Requirements
* Progress
* Notes - also referred to as session notes, treatment notes or treatment logs.

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Attendance Entry – CBRS (Center Based Related Services)
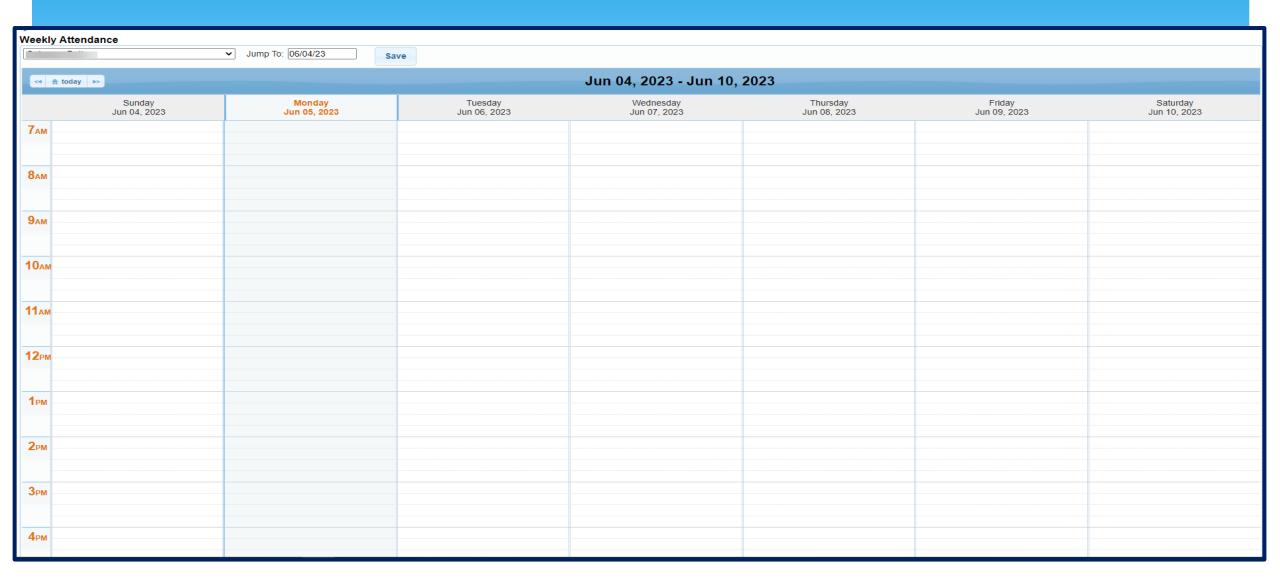
* The services provided to a child in a Center Based program is called Center Based Related Services, which is commonly called CBRS.

* Even though CBRS is included within the cost of the tuition, it is **imperative** that **ALL** CBRS have attendance/session notes entered into the Portal.

* **These session notes are needed for the County to be able to bill Medicaid for any services provided for possible reimbursement.**

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Recording Attendance / Treatment Logs

* Used for all services including:
  * SEIT / SEIS
  * Fee for service Related Services (OT, PT, etc)
  * Related Services that are included on the IEP for a child in a Center Based classroom program (OT, PT, etc.)

* Go to *Attendance -> Weekly Attendance*
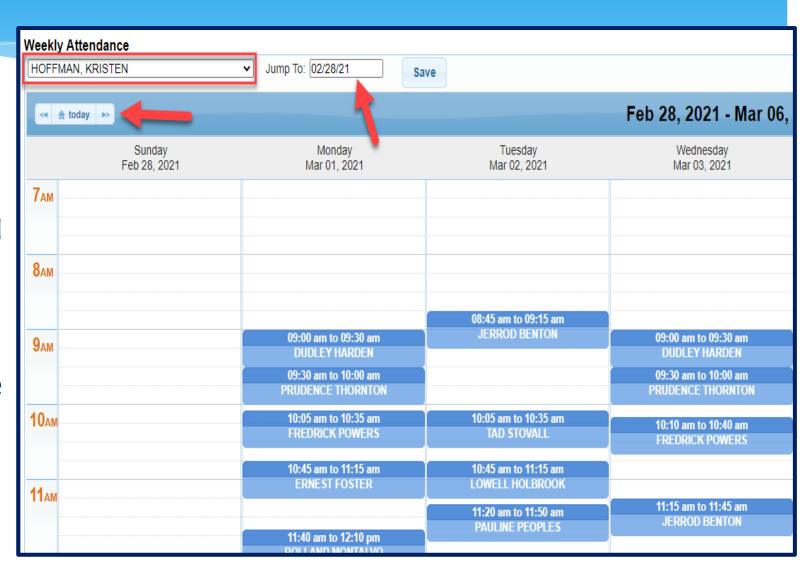
Weekly Attendance Calendar

Weekly Attendance

[dropdown]   Jump To: 06/04/23   Save

	Jun 04, 2023 - Jun 10, 2023					

<<   today   >>

Sunday Jun 04, 2023	Monday Jun 05, 2023	Tuesday Jun 06, 2023	Wednesday Jun 07, 2023	Thursday Jun 08, 2023	Friday Jun 09, 2023	Saturday Jun 10, 2023

7AM

8AM

9AM

10AM

11AM

12PM

1PM

2PM

3PM

4PM

Weekly Attendance Calendar

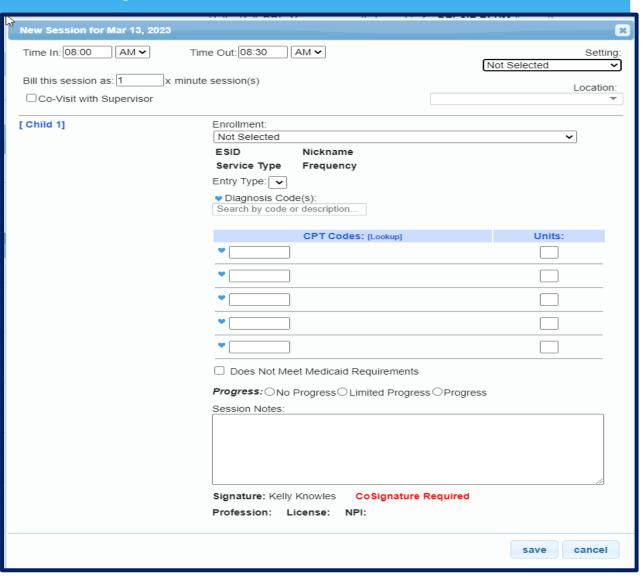* The drop down in the upper left (yellow highlight) shows the current therapist.
* You can change weeks by changing the "Jump to:" date or using the navigation buttons (red arrows).
* The calendar displays the attendance entries for the current therapist.
* To add a new entry, click the time slot corresponding to when the session was provided, and this will bring up the Attendance Entry Screen.

Attendance Entry Screen
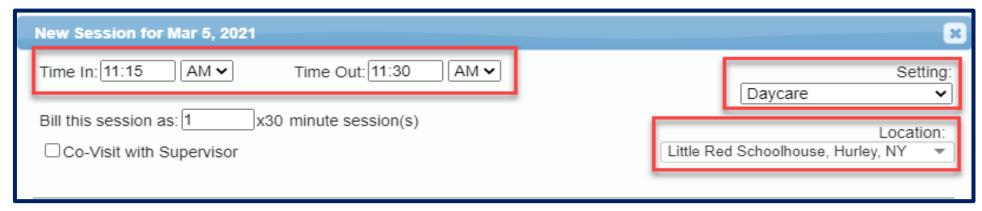
This screen has fields for:

* Time In / Time Out
* Setting / Location
* # of sessions to bill (should be 1 for most related services) SEIT may be in increments of 30 or 60 minute sessions (per IEP) (I.E. – 2x30 or 1x60)
* Child (enrollment)
* Entry Type
* ICD Codes
* CPT Codes
* Does Not Meet Medicaid Requirements
* Progress indicator
* Notes

Attendance Entry – Time, Setting & Location

* You can modify the Time In / Time Out to match exact times.

* Choose the setting that most closely matches the setting where the service was provided.

* Provide a description of the location – I.E. : ABC Daycare or address of daycare.
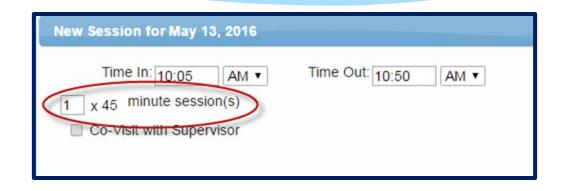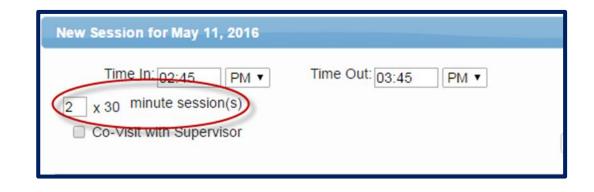
Setting & Location

* The **"Setting"** on the session note is where the service was rendered. (School, Clinic, Other).
* How specific do you need to be when indicating the "Setting?"
    * *The **setting** indicated on session notes should be **reflective of the actual location** in which the service was delivered. For example…*
        * *Public School*
        * *Private Preschool or Daycare Setting*
        * *BOCES Classroom*
            If there is more than one location associated with the same name, then the setting must uniquely be identified in the session note.
            (e.g., the physical address could be recorded as the specific "location" for the BOCES Classroom).
* Entering both the **Setting & Location** on the session note will ensure that all the required Medicaid components are entered and you won't have to un-sign the note and add it as a correction.

Attendance Entry – # of Sessions
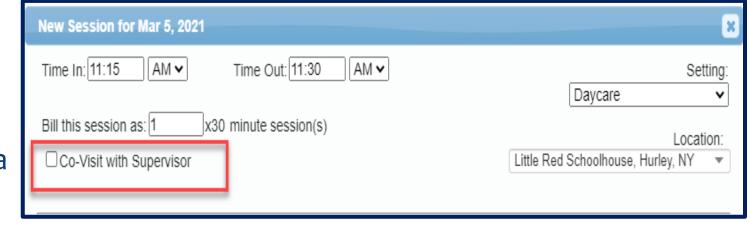
* Enter the # of sessions / units to submit to the County.

* In top example, this entry would be for 1-45 minute session.

* In bottom example, this would represent a 1 hour SEIT session that would be submitted as 2-30 minute sessions (this will always match the IEP).

New Session for May 13, 2016

Time In: 10:05 AM ▼   Time Out: 10:50 AM ▼

1 x 45 minute session(s)

☐ Co-Visit with Supervisor

New Session for May 11, 2016

Time In: 02:45 PM ▼   Time Out: 03:45 PM ▼

2 x 30 minute session(s)

☐ Co-Visit with Supervisor

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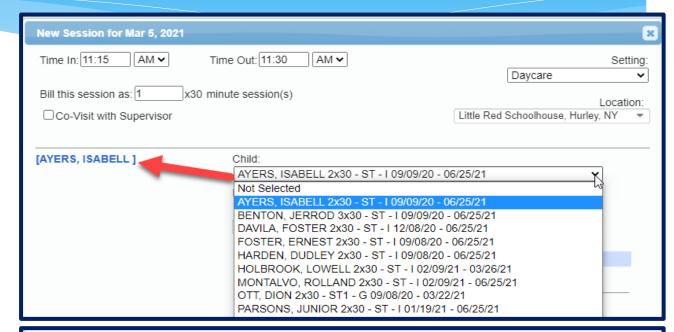
Attendance Entry – Co-Visit
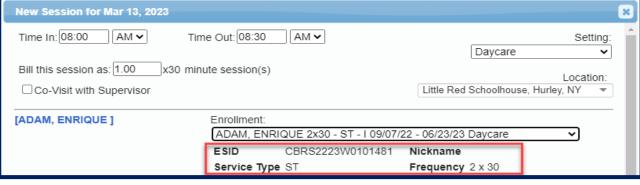
* This is for UDO/USO entries where the Supervisor is doing a co-visit with the COTA, PTA, CFY, etc.

* This is **NOT** for indicating a co-visit with a different discipline.

* When the check box is marked, a drop down of supervisors will appear to allow the user to specify who the co-visit was with.

New Session for Mar 5, 2021

Time In: 11:15 AM   Time Out: 11:30 AM

Setting:
Daycare

Bill this session as: 1 x30 minute session(s)

☐ Co-Visit with Supervisor

Location:
Little Red Schoolhouse, Hurley, NY

Attendance Entry –
Selecting the Child / Enrollment
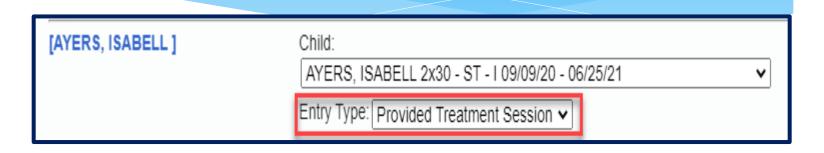
* The "Child" list are all enrollments assigned to you.
* Each enrollment entry list includes:
    * Child's Name
    * Frequency
    * Service Type
    * Individual vs. Group
    * Date range
* Select the appropriate one
* **Warning!** Be careful when selecting if there are multiple lines for a child when:
    * You provide both therapy and service coordination.
    * They have both individual and group enrollments.
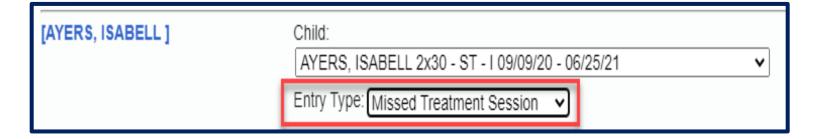
Attendance Entry – Entry Type

* This field contains 3 entry types:
  * Provided Treatment Session
  * Missed Treatment Session
  * Make Up Session

[AYERS, ISABELL] Child:
AYERS, ISABELL 2x30 - ST - I 09/09/20 - 06/25/21
Entry Type: Provided Treatment Session

[AYERS, ISABELL] Child:
AYERS, ISABELL 2x30 - ST - I 09/09/20 - 06/25/21
Entry Type: Missed Treatment Session

[AYERS, ISABELL] Child:
AYERS, ISABELL 2x30 - ST - I 09/09/20 - 06/25/21
Entry Type: Make Up Session Make Up for:

Attendance Entry –
Provided Treatment Session
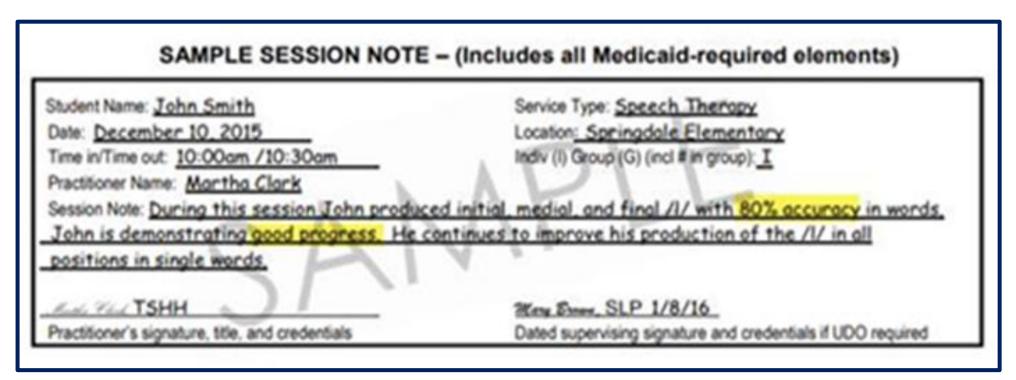
* Session Notes must include "Progress" made. In addition to checking the radio buttons for *No Progress, Limited Progress or Progress*, the session note description should include progress for the session.

* For example, a speech provider might enter the following note:

Session Notes: Activity Related to IEP Goals (including objectives and measures of success) and response(s) of child
was engaged and attentive throughout the session. and the clinician targeted basic concepts and responding to "wh" questions. Given picture cards, he was able to identify appropriate responses when choices were provided with 70% accuracy given moderate cues. He accurately differentiated between items that were the "same" and "different" with 70% accuracy. Therapy will continue to target expanding utterances and responding to "wh" questions.

Example of Medicaid Session Note

* Medicaid **does not allow** you to use canned session notes.
* Below is an example of a Medicaid session note from the Medicaid handbook:

SAMPLE SESSION NOTE – (Includes all Medicaid-required elements)

Student Name: John Smith
Date: December 10, 2015
Time in/Time out: 10:00am /10:30am
Practitioner Name: Martha Clark

Service Type: Speech Therapy
Location: Springdale Elementary
Indiv (I) Group (G) (incl # in group): I

Session Note: During this session John produced initial, medial, and final /l/ with 80% accuracy in words. John is demonstrating good progress. He continues to improve his production of the /l/ in all positions in single words.

Martha Clark TSHH
Practitioner's signature, title, and credentials

Mary Brown SLP 1/8/16
Dated supervising signature and credentials if UDO required

Attendance Entry –
Missed Treatment Session

* The Missed Treatment Session is used when the child or the service provider is absent.
* Your session note should contain who was absent:
  * The child or
  * The therapist
* If you know why the child was absent then write a reason why.
* Once you choose Missed Treatment Session, the below items now populate:
  * NOICD
  * NOCPT
  * The box for Does Not Meet Medicaid Requirements will be checked.

Attendance Entry –
Missed Treatment Session

Attendance Entry – Missed Treatment Session

* The Missed Treatment Session will appear in red on the Weekly Attendance screen.
  * You can have 2 children in the same time slot, as 1 is provided & 1 is missed.
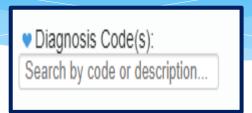
Attendance Entry –
Make Up Session
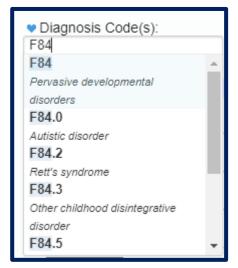
* If session is a makeup:

  * Choose the Entry Type - Make Up Session.

  * In the corresponding date box that appears, indicate the date of the missed session that is being made-up.

  * If a session is made up in the same week, it is **NOT** a make-up.

  * If a session is not made up in the same week, then it should be entered as a "Make-Up" with a "Make-up for Date".
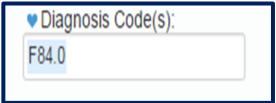
Attendance Entry – Diagnosis Code

* Type the start of the diagnosis code (or entire code)… pause for a second for list to fill… choose code.

* Once chosen, the code will show in the text box highlighted in light blue.

* To add a second code, repeat the process.

♥ Diagnosis Code(s):

Search by code or description...

♥ Diagnosis Code(s):

F84

F84
Pervasive developmental disorders
F84.0
Autistic disorder
F84.2
Rett's syndrome
F84.3
Other childhood disintegrative disorder
F84.5

♥ Diagnosis Code(s):

F84.0
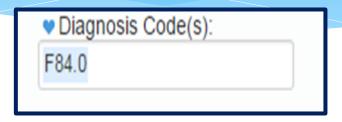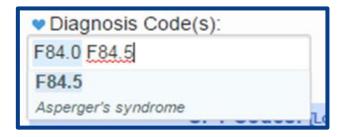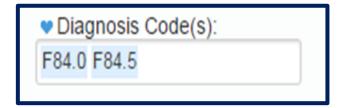
Attendance Entry –
Additional Diagnosis Codes

* To add additional ICD codes:
  * Click the blank space to the right of the last diagnosis code displayed.
  * Type the new code… when the list appears… select the correct one.
  * The additional codes will be displayed in the text box.

♥ Diagnosis Code(s):

F84.0

♥ Diagnosis Code(s):

F84.0 F84.5

F84.5

Asperger's syndrome

♥ Diagnosis Code(s):

F84.0 F84.5
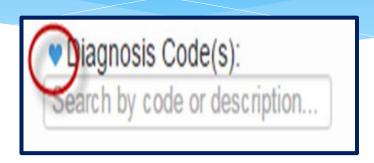
Attendance Entry –
Diagnosis Favorites

* Click the blue heart next to the Diagnosis Code(s) label.

* A list of the diagnosis that you pre-configured as "favorites" (My Profile screen) will appear.

* Choose the appropriate diagnosis.

No ICD Code

* If you are a provider that does not require an ICD Code, then you can enter **NOICD**.

    * SEIT,

    * TOD,

    * TVI etc…..
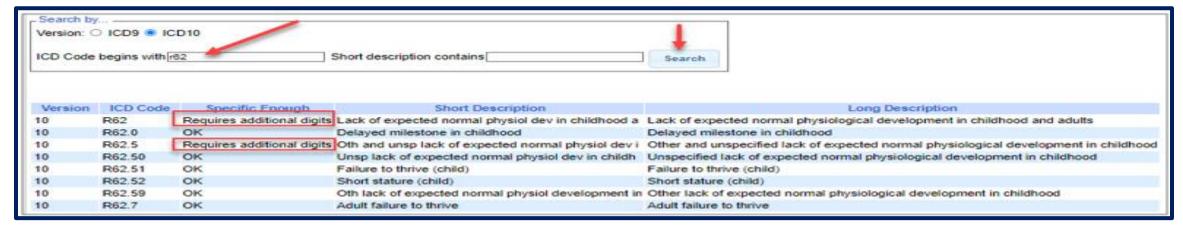
    Or a missed session will be NOICD.

♥ Diagnosis Code(s):

NOICD

ICD Codes
Billable versus Non-Billable Codes

* Medicaid does not accept all ICD Codes for Medicaid reimbursement purposes.

* The Portal has an *ICD Code Lookup* feature (Lookup -> ICD Code Lookup) where you can enter a specific ICD Code to see if the code will meet Medicaid requirements for billing.

* The list will tell you whether the code is *OK* or if the code *Requires additional digits.*

Version	ICD Code	Specific Enough	Short Description	Long Description
10	R62	Requires additional digits	Lack of expected normal physiol dev in childhood a	Lack of expected normal physiological development in childhood and adults
10	R62.0	OK	Delayed milestone in childhood	Delayed milestone in childhood
10	R62.5	Requires additional digits	Oth and unsp lack of expected normal physiol dev i	Other and unspecified lack of expected normal physiological development in childhood
10	R62.50	OK	Unsp lack of expected normal physiol dev in childh	Unspecified lack of expected normal physiological development in childhood
10	R62.51	OK	Failure to thrive (child)	Failure to thrive (child)
10	R62.52	OK	Short stature (child)	Short stature (child)
10	R62.59	OK	Oth lack of expected normal physiol development in	Other lack of expected normal physiological development in childhood
10	R62.7	OK	Adult failure to thrive	Adult failure to thrive

ICD Codes
Billable versus Non-Billable

F80 – *Specific development disorders of speech and language* **requires more specificity** for reimbursement purposes.

- **F80.0 through F80.4** shows additional digits and additional specificity so these codes are Medicaid reimbursable.

F80.8 – *Other developmental disorders of speech and language* **also requires more specificity** for reimbursement purposes.

- **F80.81 through F80.89** shows additional digits and additional specificity so these codes are Medicaid reimbursable.

Version	ICD Code	Specific Enough	Short Description
10	F80	Requires additional digits	Specific developmental disorders of speech and lan
10	F80.0	OK	Phonological disorder
10	F80.1	OK	Expressive language disorder
10	F80.2	OK	Mixed receptive-expressive language disorder
10	F80.4	OK	Speech and language development delay due to heari
10	F80.8	Requires additional digits	Other developmental disorders of speech and langua
10	F80.81	OK	Childhood onset fluency disorder
10	F80.82	OK	Social pragmatic communication disorder
10	F80.89	OK	Other developmental disorders of speech and langua
10	F80.9	OK	Developmental disorder of speech and language, uns

Specific developmental disorders of speech and language F80-

Codes
- ▶ F80 Specific developmental disorders of speech and language
  - ▶ F80.0 Phonological disorder
  - ▶ F80.1 Expressive language disorder
  - ▶ F80.2 Mixed receptive-expressive language disorder
  - ▶ F80.4 Speech and language development delay due to hearing loss
  - ▶ F80.8 Other developmental disorders of speech and language
    - ▶ F80.81 Childhood onset fluency disorder
    - ▶ F80.82 Social pragmatic communication disorder
    - ▶ F80.89 Other developmental disorders of speech and language
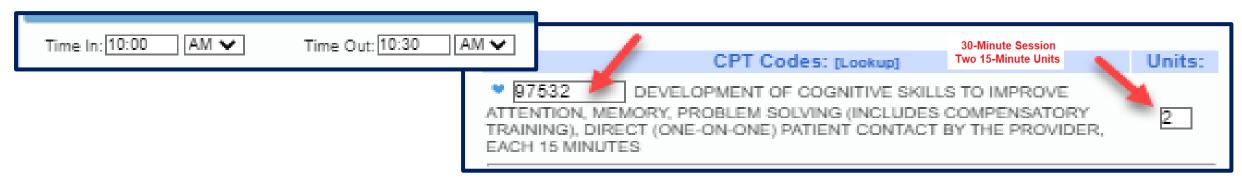 - ▶ F80.9 Developmental disorder of speech and language, unspecified

ICD Codes
Non-Billable ICD Codes on Prescriptions

* Typically, the diagnosis on a written order is determined by the ordering practitioner.
* If the diagnosis on the written order is not specific enough (a non-billable code), there are several options for the provider to determine which billable code to enter on the session note.
  - *The Service provider's education and training*
  - *Evaluation Reports may provide diagnostic information*
  - *The ordering practitioner can provide guidance*
  - *The provider can consult the governing agency for their discipline, or*
  - *The provider can reach out to SED*

Attendance Entry –
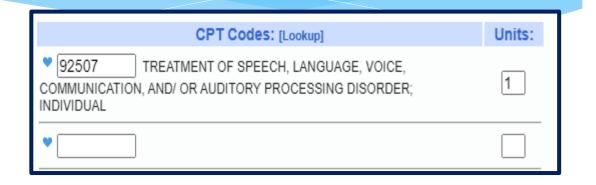# CPT (*Current Procedural Terminology*) Codes

* CPT Codes *(Current Procedural Terminology)* is a uniform language for coding medical services and procedures. Using CPT Codes increases the accuracy and efficiency of reporting medical treatments.

* CPT codes are used to identify reimbursement rates. Claims that are submitted to Medicaid must include an appropriate CPT code.

* CPT Codes are either **timed** or **untimed**. Timed codes require the **entry of units,** which must be indicated on the session note. *(e.g., PT service (97532) is being billed for 30 minutes – two units would need to be billed because 97532 is a 15-minute CPT code.)*

Time In: 10:00 AM ▼   Time Out: 10:30 AM ▼

CPT Codes: [Lookup]   30-Minute Session / Two 15-Minute Units   Units:

♥ 97532 DEVELOPMENT OF COGNITIVE SKILLS TO IMPROVE ATTENTION, MEMORY, PROBLEM SOLVING (INCLUDES COMPENSATORY TRAINING), DIRECT (ONE-ON-ONE) PATIENT CONTACT BY THE PROVIDER, EACH 15 MINUTES

2

* Untimed codes are used on a **one-*per-session*/per day** basis.

Attendance Entry – CPT Code

* Type the CPT Code into the box.

* The description will appear and the units will default to "1".

* If the CPT Code is an untimed code, leave the units as "1" (top example).

* If the CPT Code is a timed code (typically based in 15 minute units), then change the number of units (bottom example).

* Click the blue heart next to the CPT Code(s) to create favorites.

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CPT Codes: [Lookup]	Units:
♥ 92507 TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/ OR AUDITORY PROCESSING DISORDER; INDIVIDUAL	1
♥	

CPT Codes: [Lookup]	Units:
♥ 97112 THERAPEUTIC PROCEDURE, ONE OR MORE AREAS, EACH 15 MINUTES; NEUROMUSCULAR REEDUCATION OF MOVEMENT, BALANCE, COORDINATION, KINESTHETIC SENSE, POSTURE, AND/OR PROPRIOCEPTION FOR SITTING AND/OR STANDING ACTIVITIES	2
♥ 97110 THERAPEUTIC PROCEDURE, ONE OR MORE AREAS, EACH 15 MINUTES; THERAPEUTIC EXERCISES TO DEVELOP STRENGTH AND ENDURANCE, RANGE OF MOTION AND FLEXIBILITY	1
♥	

CPT Codes –
Timed vs. Untimed

* From CPT Code list on Resources page of SED Medicaid in Education site (http://www.oms.nysed.gov/medicaid/resources/)

  CPT codes are either timed or untimed. Timed codes require the entry of units. When the practitioner chooses a code, the number of units must also be indicated. For example, if the physical therapist provided a service (CPT code 97140), and the session lasted 30 minutes, two units would be billed. Untimed codes are used on a one-per-session/per day basis. With one exception, providers should not report more than one physical medicine and rehabilitation therapy service for the same 15 minute time period. The only exception involves a "supervised modality" defined by CPT codes 97010-97028 which may be reported for the same 15 minute time period as other therapy services. For more information on the use of CPT codes and the claiming parameters, please contact your individual professional organizations.

No CPT Code

* If you are a provider that does not require an ICD Code, then you can enter NOICD.

* Or a missed session will be NOCPT.

CPT Codes: [Lookup]	Units:
♥ NOCPT No CPT Code for this service	1
♥	

When To Use
"Does Not Meet Medicaid Requirements"

* If a service provider provides a session that does not meet Medicaid requirements, the, **"Does Not Meet Medicaid Requirements"** box on the session note should be checked.
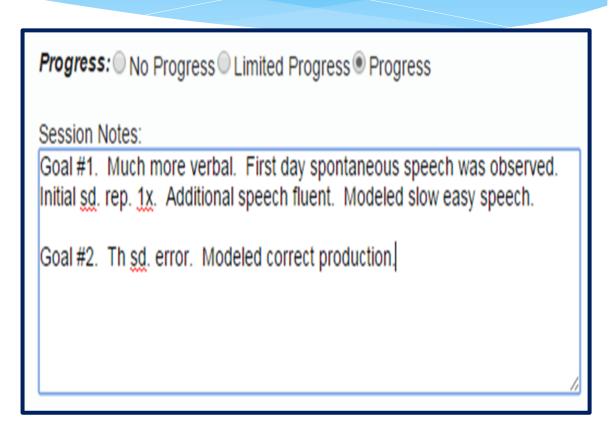

* The checkbox should be checked for situations where the provided session does not meet Medicaid requirements. Such as...

  ▪ *The child is sleeping during the session.*
  ▪ *The child was picked up by the parent in the middle of the session.*
  ▪ *The child's behavior did not allow the session to be completed in its entirety; goals could not be met.*
  ▪ *The service provider and child were outside for a fire drill and as a result the session was not provided.*
  ▪ *The IEP was for group, but there are more than 5 students in the group. If the group exceeds 5 students, then the whole group will be marked as "Does Not Meet Medicaid Requirements".*

The checkbox does not need to be checked for the following circumstances:

  ▪ *Is not necessary for a "Group of 1." Billing edits will not allow Medicaid to be billed for a group of one.*
  ▪ *Is not necessary for Make-up sessions if the session is marked specifically as a Make-up.*

Attendance Entry – Session Note

* You can indicate progress using the progress indicators.

* In the notes, you can record your notes per policies and regulations.

* According to SED site, a session note is a "Brief description of the student's progress made by receiving the service during the session".

Progress: ○ No Progress ○ Limited Progress ◉ Progress

Session Notes:

Goal #1. Much more verbal. First day spontaneous speech was observed. Initial sd. rep. 1x. Additional speech fluent. Modeled slow easy speech.

Goal #2. Th sd. error. Modeled correct production.

A Completed & Signed Session Note

1) **Student's Name**
2) **Service**
3) **Individual/ Group & Group Size**
4) **Setting (*Location Recommended)**
5) **Time In / Time Out**
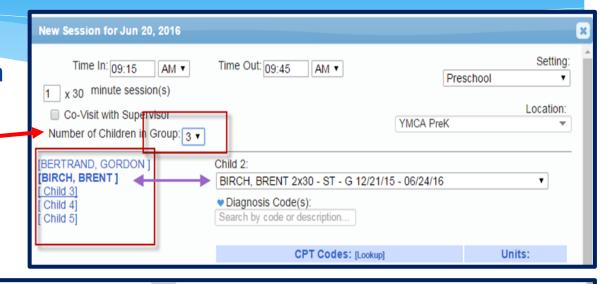6) **Brief Description**
7) **Name/Title/Signature of provider**
8) **Dated Signature & Credentials**
9) **CPT Code(s)**
10) **ICD Code(s)**

PORTAL — Treatment Log

Child Name			DOB	Billing Provider		NPI
CURRIE, QUENTIN 1)			12/12/17	ACHIEVEMENTS		1316190903

Service	Individual/Group	IEP From	IEP To	District		County
Speech Therapy 2)	3) Individual	09/07/22	06/23/23	ROTTERDAM-MOHONASEN CSD		SCHENECTADY

Frequency	ESID			Rendering Provider	License	NPI
2x30	RS2223W0017241			ADELAIDE CARVER	030860	1811511298

Date Of Service	Time In 5)	Time Out	Duration	# in Group	Supervising Provider (UDO/USO)	License	NPI
09/12/22	02:30 PM	03:00 PM	30				

Setting 4)	Location *			Referring Provider		NPI
Preschool	123 Main Street, Schenectady, NY					

CPT	Units	Minutes	Description		ICD	Description
92507	1	9)	TREATMENT OF SPEECH, LANGUAGE, VOICE,	10)	F80.1	Expressive language disorder

Session Notes: Activity Related to IEP Goals (including objectives and measures of success) and response(s) of child

6) Quentin was engaged and attentive throughout the session. Given picture cards, he was able to identify appropriate responses when choices were provided with 70% accuracy given moderate cues. He accurately differentiated between items that were the "same" and "different" with 70% accuracy.

	Name, Title and Credentials	NPI	License	Date Signed	Signature Method
Rendering Provider 7)	Kelly Thayer, M.S.Ed., CCC-SLP	1811511298	030860	8) 10/04/22	DIGITAL
UDO/USO Supervisor					
QA Review					

Group Attendance

* Group attendance is entered using same screen.
* If the chosen enrollment is for "group" the screen adds:
  * A field to enter # of children in the Group.
  * Links to select the other children in the group. The selected child is in bold.
  * The child name appears as the generic "Child X" until you select an enrollment for Child X.
* The screen provides for the ability to enter separate ICD, CPT and notes for each child.
* On the calendar, they display as "GRP" and then the last names.
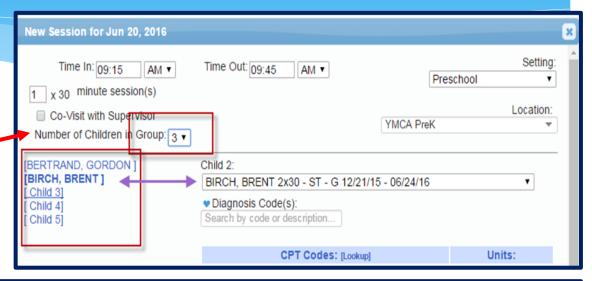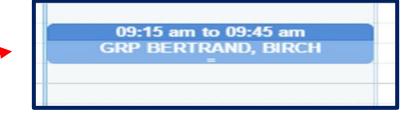* For a group of 1, you **cannot** use a group CPT code. You must use an individual CPT code.

Group Attendance

* If you have 2 or more children and one child is from a county that does not use the Portal:
  * Enter the # of children in the Group.
  * Select the other children in the group.
    * The selected child is in bold.
  * The child who is from the county that doesn't use the Portal will not appear in your drop down of children.
    * This child will be done on a paper session note.
* On your weekly calendar, only 2 children will appear as the third child is on a paper note.

Co-Treatments

* Can more than one therapist providing co-treatment bill for the same session? No.

  * *Co-Treatment consists of more than one professional providing treatment at the same time. Therapists, or therapy assistants, working together as a "Team" to treat one or more individuals cannot bill separately for the same (or different) service provided at the same time to the same individual. For co-treatments only one CPT code may be billed per session.*

* Both therapists should complete a session note for the co-treatment, but one therapist should mark their session as, "**Does Not Meet Medicaid Requirements.**"

  * **If speech is one treatment, then generally speech is billable & the other service will mark as not billable.**

Editing an Existing Attendance

* Click any session on the calendar to edit or view the details of the session.

* If the fields are greyed out and there is no save button, that means the session is signed and **cannot** be modified without un-signing first.

* If you cannot unsign your attendance, then the child is likely on a billing voucher, and needs to be removed.

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Contemporaneous

* Session Notes must be completed by all qualified providers furnishing the services authorized in a student's IEP for each Medicaid service.

* Service providers must maintain _contemporaneous_ records.

* What is the suggested time frame for completing contemporaneous Sessions Notes for Medicaid purposes? *Sessions should be documented as close to the conclusion of the session as practicable.* For _supervising clinicians_ the session note must be signed within 45 days.
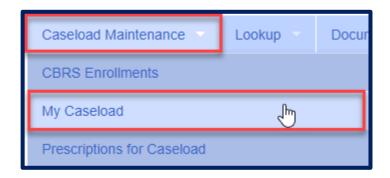
Back-To-Back Sessions

* Back-to-back sessions are Medicaid reimbursable. How should time in/time out be documented in the session note? **(e.g., Student A – 12:00 to 12:30 / Student B – 12:30 to 1:00)**

  * *Back-to-back sessions <u>are</u> Medicaid reimbursable. If sessions were delivered consistent with the written order, IEP and Medicaid policy then Medicaid may be billed for the sessions. **The session note must reflect the "exact" time that the session was provided.***
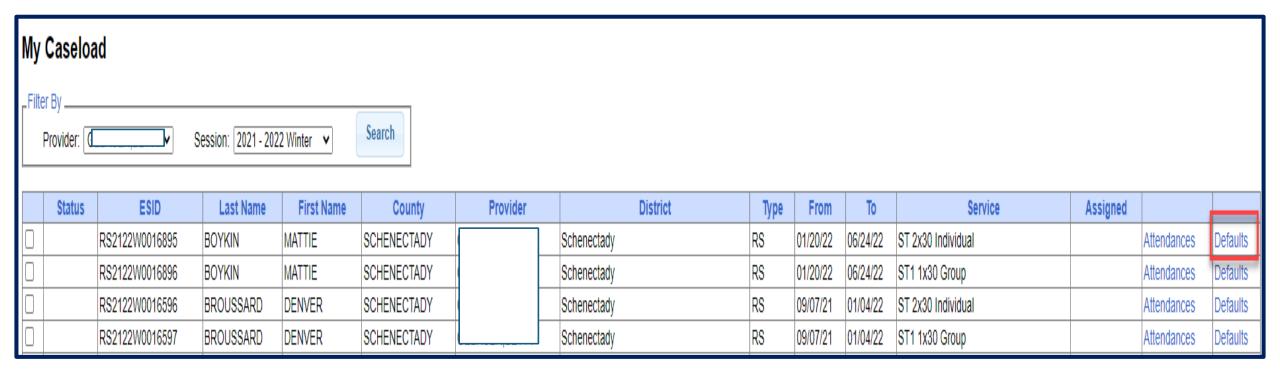
Creating Defaults for Session Notes

Creating Defaults

* You can create defaults for your session notes / attendances that can include:
  * Service Setting,
  * Location,
  * Default CPT Code,
  * Default ICD 10 Code.

* Go to *Caseload Maintenance -> My Caseload*.

Creating Defaults

* Click on the "*Defaults*" button at the end of the enrollment.

Creating Defaults

* Now you will enter:
  * Service Setting
  * Location
  * Default CPT Code
  * Default ICD 10 Code

* You can also enter an enrollment note. Here you can enter the goals off of the IEP, and the goals will then populate to each session note. You can then adjust as needed.

Creating Defaults

Creating Defaults

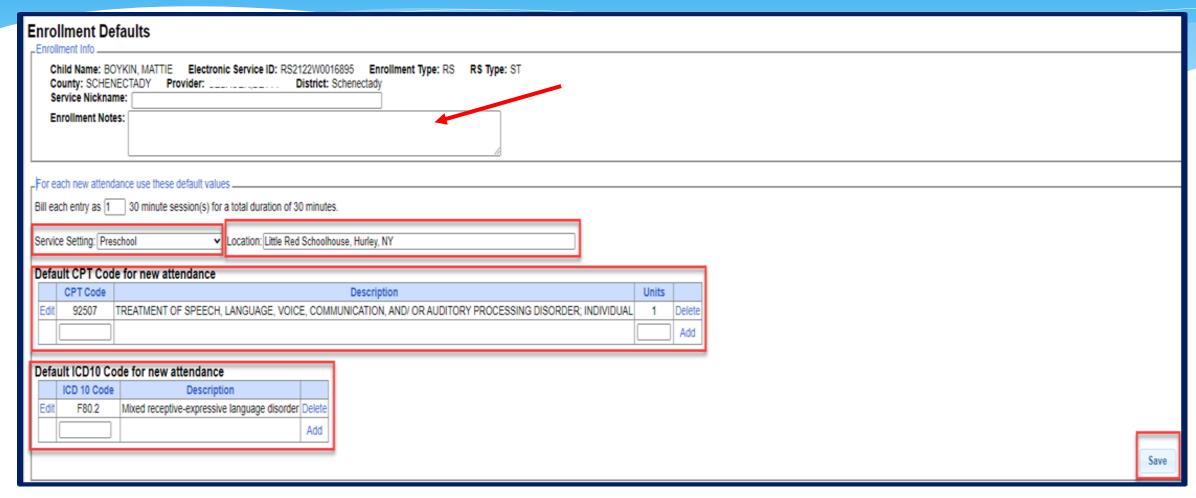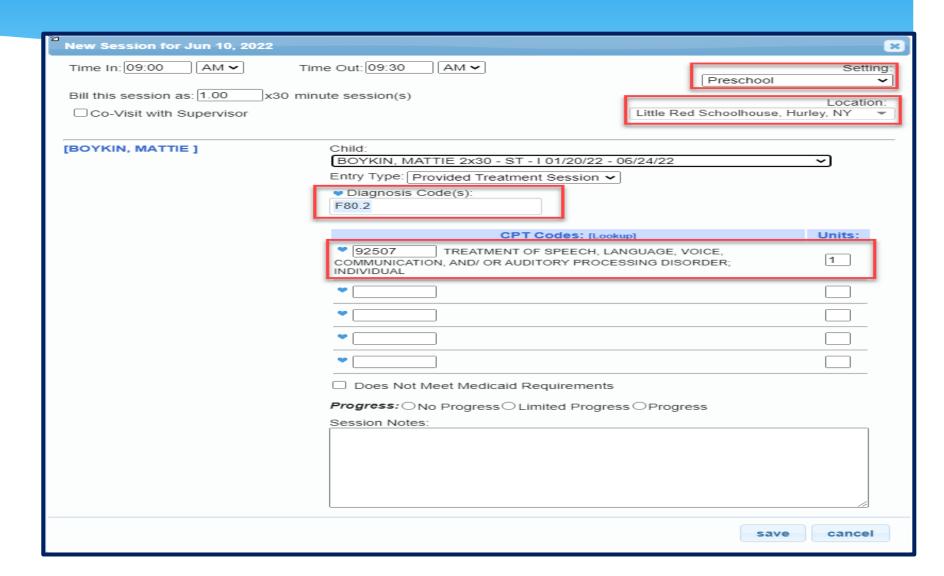* Here is an example of the session note that will populate with the defaults that were created for this child's enrollment.

New Session for Jun 10, 2022

Time In: 09:00 AM   Time Out: 09:30 AM

Setting:
Preschool

Bill this session as: 1.00 x30 minute session(s)

☐ Co-Visit with Supervisor

Location:
Little Red Schoolhouse, Hurley, NY

[BOYKIN, MATTIE]

Child:
BOYKIN, MATTIE 2x30 - ST - I 01/20/22 - 06/24/22

Entry Type: Provided Treatment Session

♥ Diagnosis Code(s):
F80.2

CPT Codes: [Lookup]   **Units:**

♥ 92507   TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/ OR AUDITORY PROCESSING DISORDER; INDIVIDUAL   1

♥ [   ]   [   ]

♥ [   ]   [   ]

♥ [   ]   [   ]

♥ [   ]   [   ]

☐ Does Not Meet Medicaid Requirements

Progress: ○ No Progress ○ Limited Progress ○ Progress

Session Notes:

[   ]

save   cancel

Signing Attendance / Review and Sign

Signing Attendance

* After attendance is entered, it needs to be signed.

* Once it is signed, it **cannot** be modified without going through the "un-signing" process.

* A digital signature is equivalent to signing your name on paper with ink.

* A digital signature requires that you intentionally take action to indicate your signature.

* The action in CPSE Portal is to enter a PIN that you have chosen.

* Your PIN works in conjunction with your username/password.

* You should never share your password or your PIN with anyone.
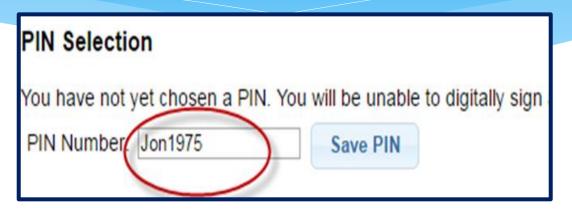
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Choosing / Changing Your Pin

* Go to **My Account -> My Pin**

* Your PIN can be numbers, letters or both.

* Choose a PIN and click "*Save PIN*".

* The screen will prompt you to enter your log on password.

* This is NOT your PIN, this is the password you use to login to CPSE Portal.

* Click "*Proceed*".

PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign attendance until you do so. Please create one now.

PIN Number: Jon1975   Save PIN

Password Verification ✖

For additional security, please re-enter your login password.

Password ....

Proceed

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PIN Problems

* The # 1 issue with PINs is letting the browser save your PIN.

* Ensure when setting / changing your PIN, that your browser doesn't try to overwrite your PIN.

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PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign

PIN Number: Jon1975   Save PIN

PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign attendance

PIN Number: 1234   Save PIN

Password Verification

For additional security, please re-enter your login password.

Password: ....

Proceed

Signing Your Attendance
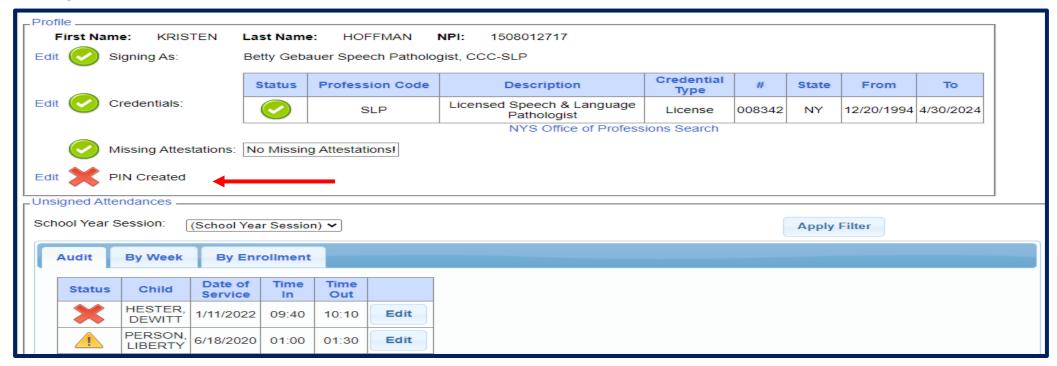
* Items needed for Signing:
  * You must have set your PIN.
  * You must have your Title, Signature and Credentials entered.
  * You must have a valid (not expired) license / profession entered.

Therapist Signature In Portal

* The Portal Signature shown on the **My Profile** *(My Account>My Profile)* screen is used on session notes and digital speech recommendations.

* The screenshot below shows the proper credentials for an SLP. If the Provider's credentials are not listed in the signature, a prescription or session note is signed with just a name.

  * **Sarah Brown** is not the same as **Sarah Brown, Speech Pathologist, CCC-SLP.**

* Medicaid states that the provider's **Name, Title, Signature and Credentials must be listed on a Medicaid Session Note.**

Review and Sign

* Go to *Attendance -> Digital Signature -> Review and Sign Attendance*
* This will bring you to a screen which will verify your profile information as well as show unsigned attendances. Make sure all profile information are green checkmarks. If not then go to your profile and correct.
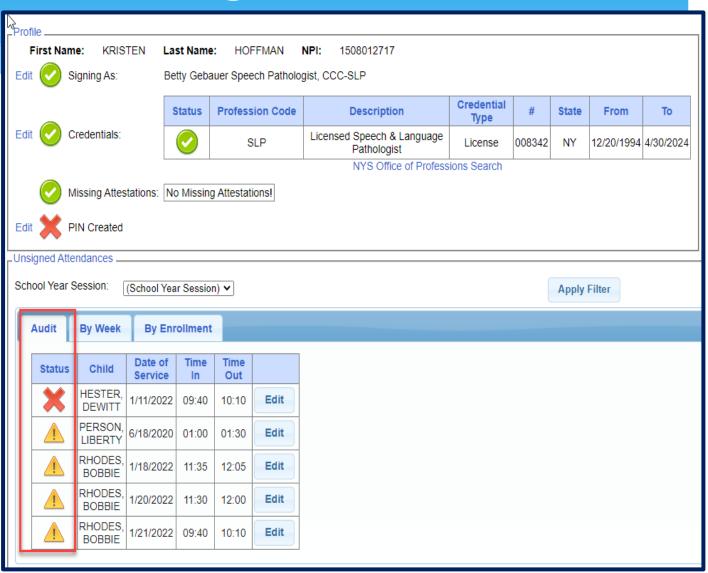
Review and Sign

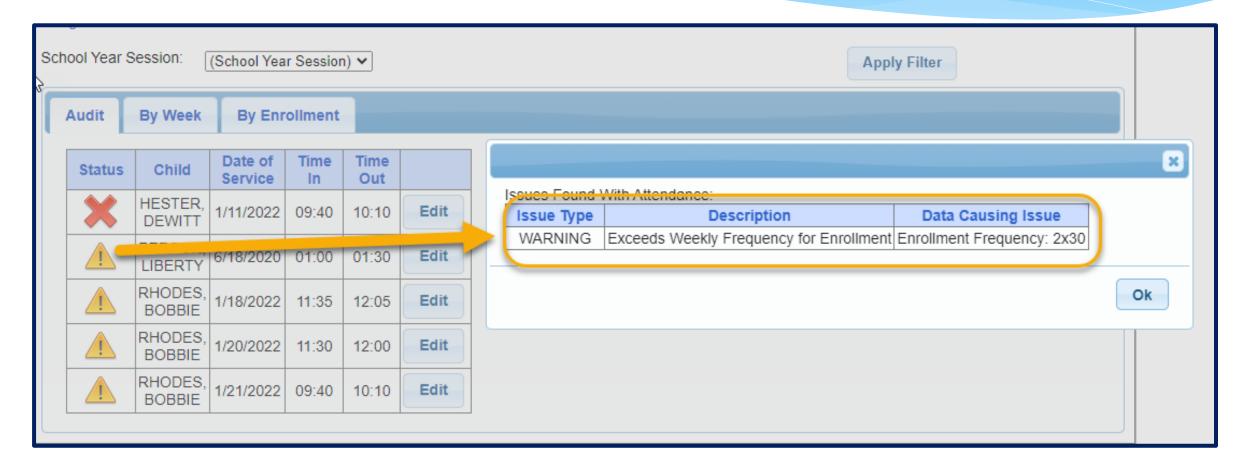* Within the unsigned attendances, there will also be icons listed under the **Audit tab** in the "Status" column:

A green check means there are no errors

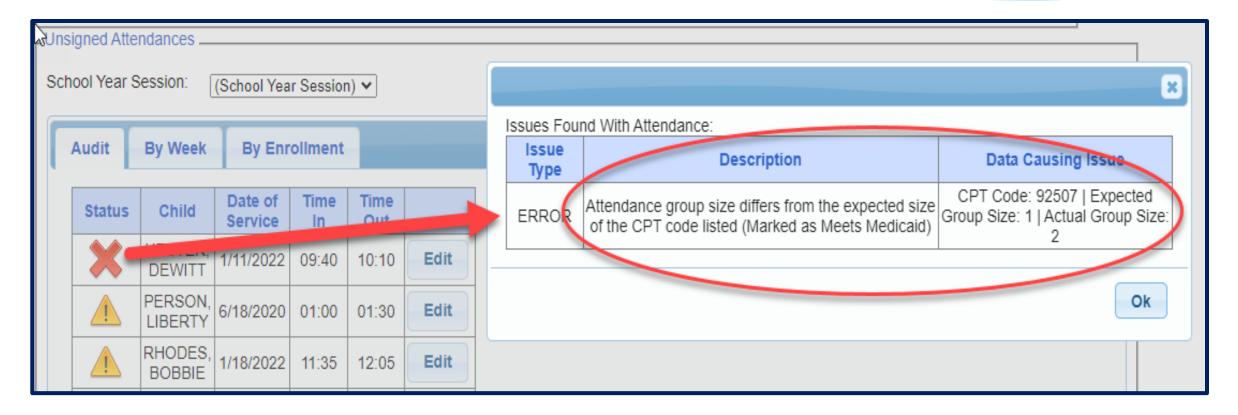A yellow exclamation point is a warning and will not prevent signing.

A red "X" means there is an error that will prevent signing.

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Profile

First Name: KRISTEN   **Last Name:** HOFFMAN   **NPI:** 1508012717

Edit ✓ Signing As: Betty Gebauer Speech Pathologist, CCC-SLP

Edit ✓ Credentials:

Status	Profession Code	Description	Credential Type	#	State	From	To
✓	SLP	Licensed Speech & Language Pathologist	License	008342	NY	12/20/1994	4/30/2024

NYS Office of Professions Search

✓ Missing Attestations: No Missing Attestations!

Edit ✗ PIN Created

Unsigned Attendances

School Year Session: (School Year Session) ▼   Apply Filter

| Audit | By Week | By Enrollment |

Status	Child	Date of Service	Time In	Time Out	
✗	HESTER, DEWITT	1/11/2022	09:40	10:10	Edit
⚠	PERSON, LIBERTY	6/18/2020	01:00	01:30	Edit
⚠	RHODES, BOBBIE	1/18/2022	11:35	12:05	Edit
⚠	RHODES, BOBBIE	1/20/2022	11:30	12:00	Edit
⚠	RHODES, BOBBIE	1/21/2022	09:40	10:10	Edit

Review and Sign

* By clicking on the icon, you can see what the reason is.
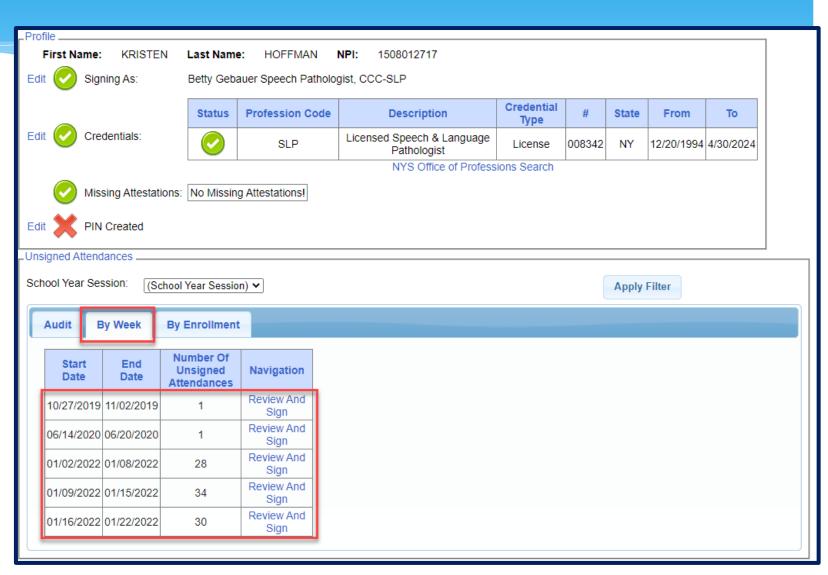
Review and Sign

* Click "*Edit*", and make appropriate changes to session note.
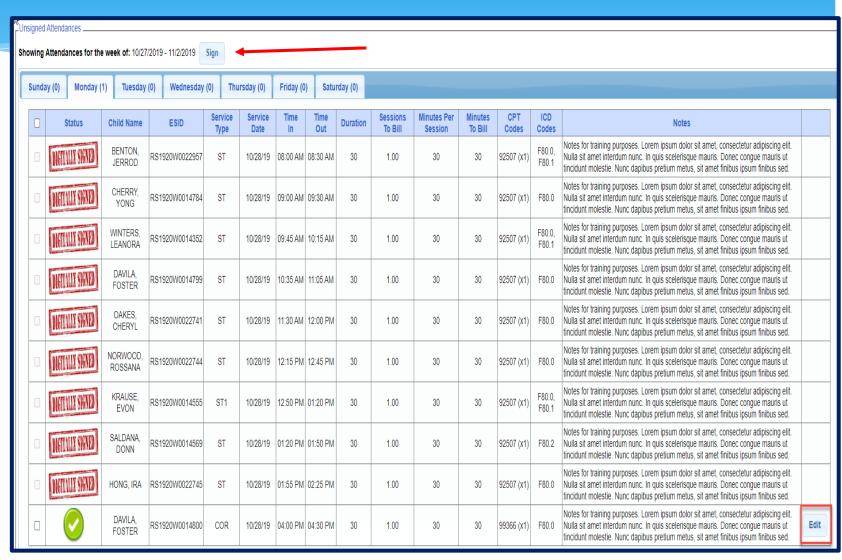
Review and Sign by Week

* **By Week:**
  * Under the "By Week" tab, the attendances are listed by date.
  * You may view more information, as well as sign the attendances, by clicking the "*Review & Sign*" link under the navigation column.
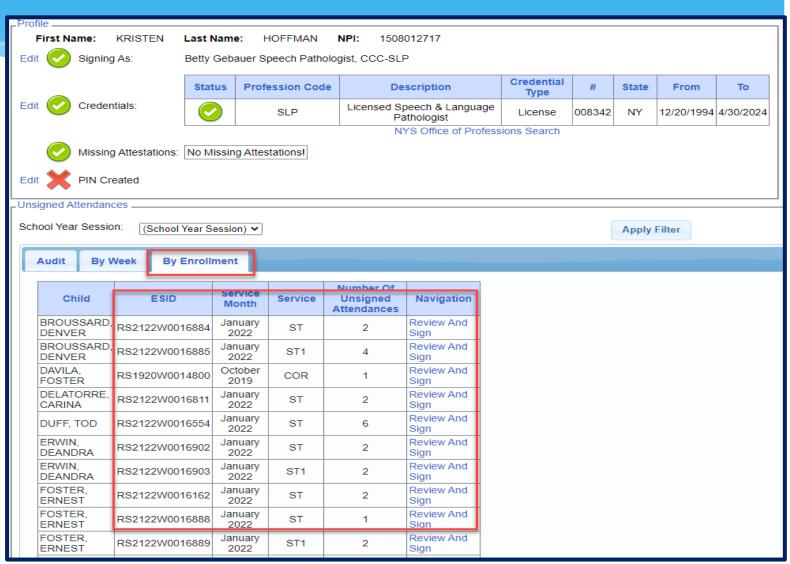
Review and Sign by Week

* You will then be able to toggle between days of the week.

* To sign:
  * Check the desired boxes & click "*Sign*"
  * If there is a problem with the attendance that you'd like to correct, use the "*Edit*" button.
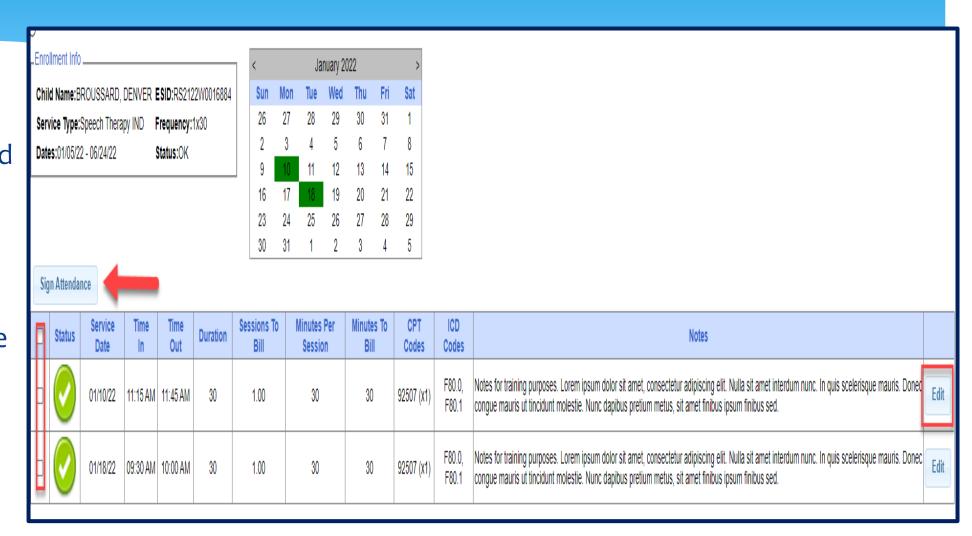
Review and Sign by Enrollment

* **By Enrollment:**

  * Under the "By Enrollment" tab, the attendances are listed by enrollment.

  * You may view more information, as well as sign the attendances, by clicking the "*Review & Sign*" link under the navigation column.
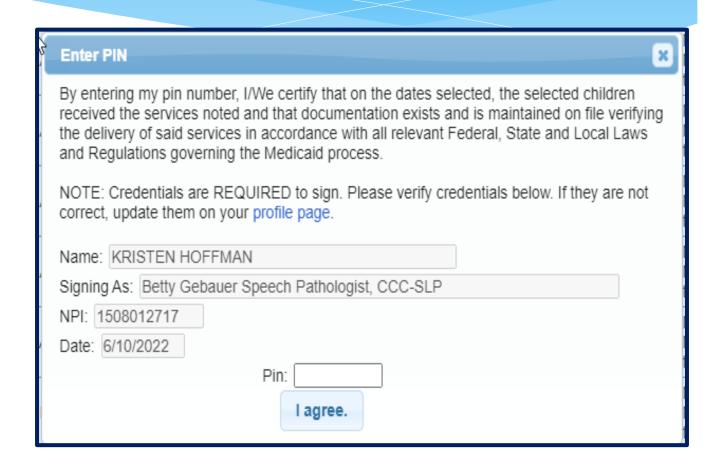

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Review and Sign

* To sign:
  * Check the desired boxes & click "*Sign Attendance*".
  * If there is a problem with the attendance that you'd like to correct, use the "*Edit*" button.

Enrollment Info

Child Name: BROUSSARD, DENVER **ESID:** RS2122W0016884

Service Type: Speech Therapy IND **Frequency:** 1x30

Dates: 01/05/22 - 06/24/22 **Status:** OK

		January 2022					>
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
26	27	28	29	30	31	1	
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	
30	31	1	2	3	4	5	

Sign Attendance

	Status	Service Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes	
☐	✓	01/10/22	11:15 AM	11:45 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	Edit
☐	✓	01/18/22	09:30 AM	10:00 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	Edit

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Sign By Entering PIN

* In the box that appears:
  * Confirm your information
  * Enter your PIN
  * Click "*I Agree*" to certify that you have reviewed the information and you are signing attesting that everything is correct
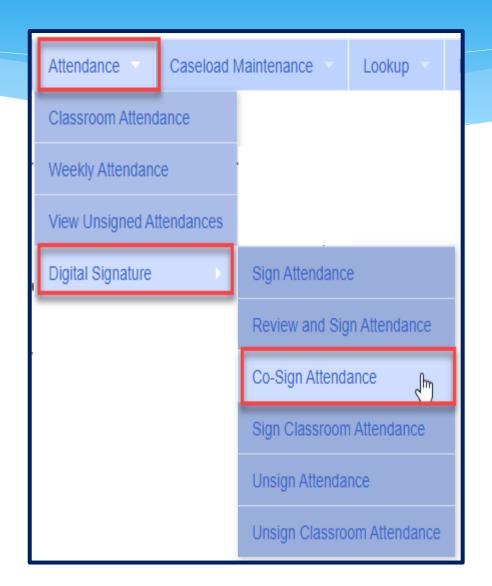
Enter PIN

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.

NOTE: Credentials are REQUIRED to sign. Please verify credentials below. If they are not correct, update them on your profile page.

Name: KRISTEN HOFFMAN

Signing As: Betty Gebauer Speech Pathologist, CCC-SLP

NPI: 1508012717

Date: 6/10/2022

Pin:

I agree.

Sign Frequently

* As a best practice, you should sign frequently.
    * After you record your notes for the day, **sign your attendances**.

* Waiting until the end of the month **causes** problems.
    * There are too many entries to do a proper review.
    * It is too long past the activity to remember anything.

Co-Signing Session Notes

Co-Signing Session Notes

* Go to *Attendance -> Digital Signature -> Co-Sign Attendance*

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Co-Signing Session Notes

* Use your filter to select date range, therapist or a specific enrollment.

* Once you have selected your filters, click *"Retrieve"*

* After reviewing attendances, select the attendances you wish to sign by clicking the box next to each name.

* Click on *"Sign Attendance"*

* Read the agreement, enter your PIN and click *"I agree"*.

* Once the attendances are signed successfully, you will receive a confirmation pop up.

Co-Signing Session Notes

Filter: DELISA DAVISON - CORRIE CREWS - PT - January 2 ▾ [Retrieve]

Service Provider: DELISA DAVISON

Child: CORRIE CREWS

Service Type: PT

Month: January 2022

	Service Date	Service Setting	CoVisit Therapist	Make Up For	Start Time	End Time	CPT Codes	ICD Code	Notes	
☐	1/12/2022	Teletherapy	PLUMMER, SHERILL		12:00 PM	12:30 PM	97530	R62.50	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	View
☐	1/14/2022	Therapy Room			12:15 PM	12:45 PM	97530	R62.50	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	View
☐	1/18/2022	Therapy Room			12:30 PM	1:00 PM	97530	R62.50	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	View

[Sign Attendance]

Un-signing Attendance / Making Corrections After Signed

Un-signing Attendance – Making Corrections After Attendance is Signed
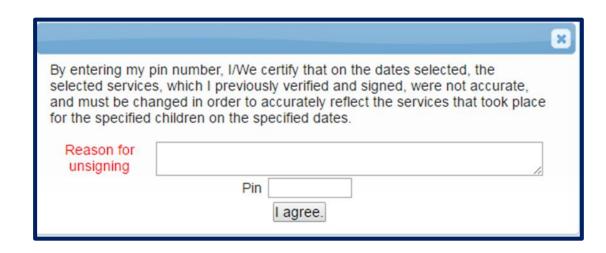
* If after you reviewed and signed attesting that everything was accurate, a mistake is noticed, the process to correct is as follows:

  * If the entry is on a voucher to be billed (but hasn't been paid), it needs to be removed from the voucher.
  * You will un-sign your attendance, make correction, and resign your attendance.

* Teachers will also need to un-sign their attendance to make a correction, but they will choose "*Unsign Classroom Attendance*".

* Go to **Attendance -> Digital Signature -> Unsign Attendance**

Un-signing Attendance
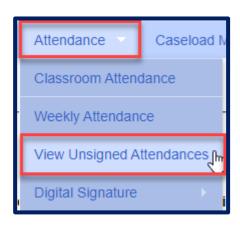
* Use Filter to search for attendances.
* Click check box on rows to unsign.
* Click "*Unsign Attendance*".
* Enter the reason (ex. entered wrong time).
* Enter your PIN.
* Click "*I Agree*" attesting that you previously verified signed but are inaccurate.

View Unsigned Attendance

* Go to *Attendance -> View Unsigned Attendances*

* This will give you a list of attendances that have been started but not completed. Incomplete attendances can be deleted from here.

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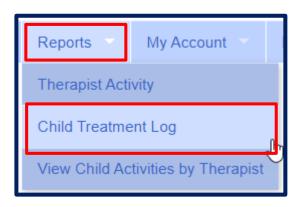
Printing Logs

Child Treatment Log

* Go to **Reports -> Child Treatment Log**

* The filters will allow you to specify criteria for the report:
  * Select Service Provider
  * Select Service Dates
  * Select County
  * Select Child(ren)

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Child Treatment Log

Print Parent Signature Log

* Go to *Caseload Maintenance -> My Caseload*

* Choose the Enrollment needed, and click Generate Blank Signature Logs for Selected Enrollment.

* On Generate Parent/Guardian Signature Logs, choose month, and click Generate.

Print Parent Signature Log

	CP SE PORTAL		Preschool Confirmation of Delivery of Services		
	SCHENECTADY County			Service Month _____	

Child's Name MATTIE BOYKIN		DOB 12/06/2016	Type of Service Speech Therapy		Frequency & Duration 2x30
Agency Name GEBA		NPI # 1508012717	School District Schenectady		
Name of Individual Service Provider KRISTEN HOFFMAN		Profession Licensed Speech & Language Patholc	License 008342		NPI 1508012717

Date of service	Start time	End time	Session Code: P, CA, TA, MU	Parent/Guardian Signature/Verifying Witness Signature

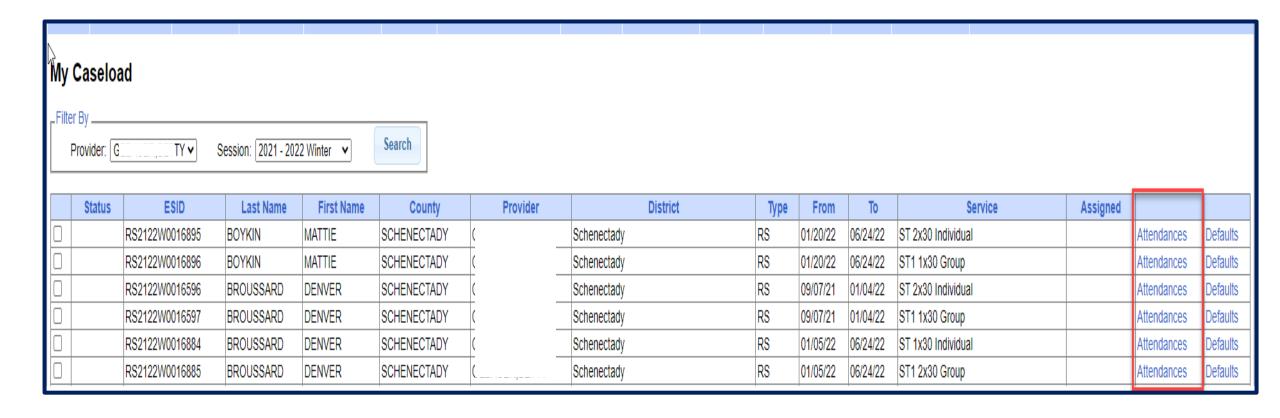**Service Codes**: P-Service Provided, CA-Child Absent, TA-Teacher Absent, MU-Makeup

Reports

View Caseload – For Service Providers

* Are you a Service Provider working for an agency, and can't find one of your students?

* Go to *Caseload Maintenance -> My Caseload*

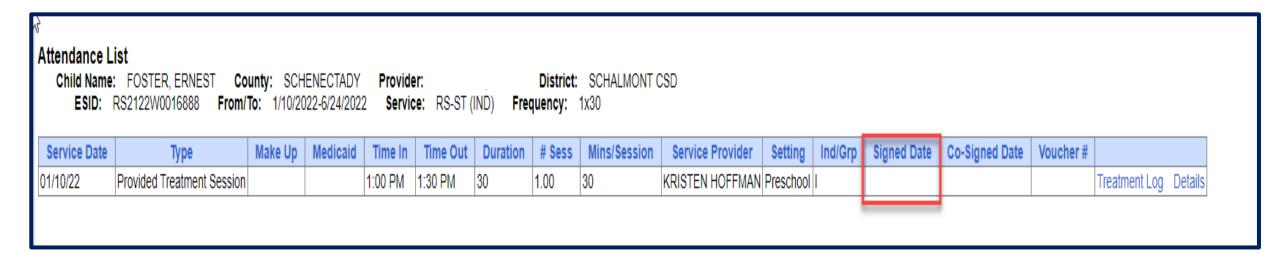* If the child is not listed, contact the administrator of your agency and ask them to assign the child to you.

View Caseload

* You can also see all of the attendances that you entered for the child by clicking on Attendances.
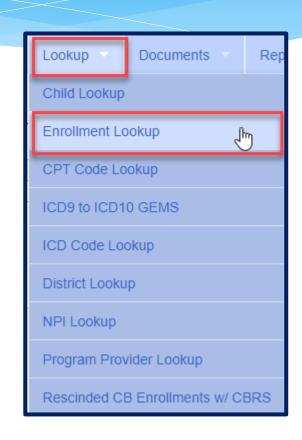
View Caseload

* In the screen shot below you can see that the attendance has not been signed by the service provider.
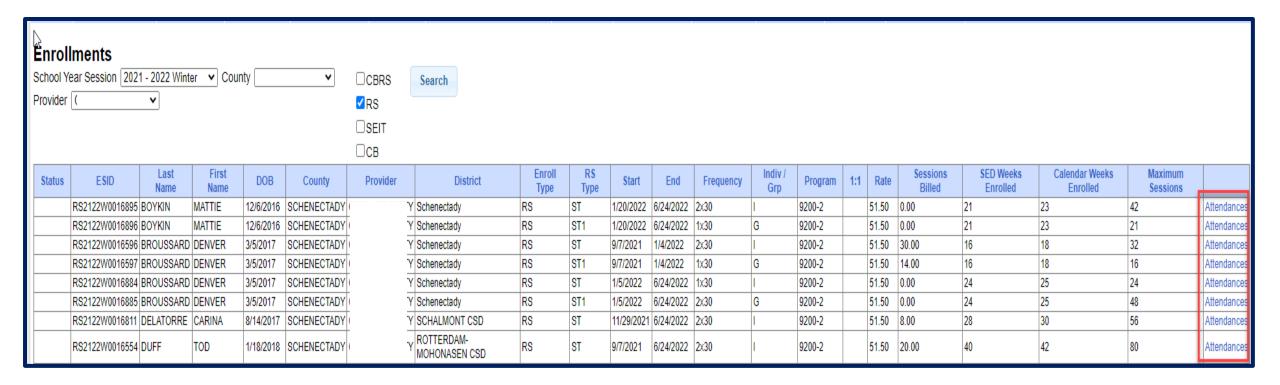
Attendance List

Child Name: FOSTER, ERNEST **County:** SCHENECTADY **Provider:** **District:** SCHALMONT CSD
ESID: RS2122W0016888 **From/To:** 1/10/2022-6/24/2022 **Service:** RS-ST (IND) **Frequency:** 1x30

Service Date	Type	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #		
01/10/22	Provided Treatment Session			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I				Treatment Log	Details

Enrollment Lookup –
For Agency Staff or Independent Providers

* You can search for enrollments to find all students that have been assigned to your agency. You can also see all attendances that you have entered on the enrollment.

* If a child is not listed, then contact the County.

* Go to **Lookup -> Enrollment Lookup**

Lookup ▾	Documents ▾	Rep
Child Lookup		
Enrollment Lookup		
CPT Code Lookup		
ICD9 to ICD10 GEMS		
ICD Code Lookup		
District Lookup		
NPI Lookup		
Program Provider Lookup		
Rescinded CB Enrollments w/ CBRS		

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Enrollment Lookup

* Filter the School Year Session, County, and what enrollment type you are looking for.
* Click on Attendances to see all attendances entered on the enrollment.
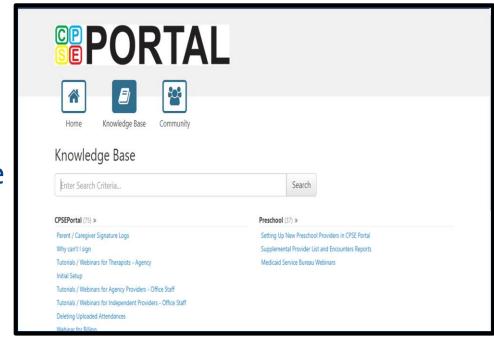
Enrollment Lookup – Attendance List

* This will also show if the attendances have been billed, and what Voucher # they have been billed on.

* Click on Treatment Log to see the actual session note.

Attendance List

Child Name: CHERRY, YONG **County:** SCHENECTADY **Provider:** GEE **District:** Mohonasen
ESID: RS1920W0014784 **From/To:** 9/3/2019-11/19/2019 **Service:** RS-ST (IND) **Frequency:** 2x30

Service Date	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	
09/11/19			9:10 AM	9:40 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/16/19			9:35 AM	10:05 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/18/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/23/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/25/19			8:55 AM	9:25 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/30/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
10/02/19			9:15 AM	9:45 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/07/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/09/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/21/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/23/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/28/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
11/01/19			11:15 AM	11:45 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log
11/13/19			9:10 AM	9:40 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log
11/15/19			10:50 AM	11:20 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log
11/18/19			9:15 AM	9:45 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log

Closing

Portal Training – Knowledge Base

* The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Portal support.

* You can simply click the Knowledge Base tab in the Portal or you can go to:

* *http://support.cpseportal.com/kb*

Knowledge Base Articles

* **Entering Weekly Attendance**
  * *http://support.cpseportal.com/kb/a38/entering-weekly-attendance.aspx*
* **Review and Sign Attendance**
  * *http://support.cpseportal.com/kb/a148/review-and-sign-attendance.aspx?KBSearchID=16970*
* **Child Treatment Log**
  * *http://support.cpseportal.com/kb/a28/child-treatment-log.aspx?KBSearchID=16959*
* **Parent/Caregiver Signature Logs (blank logs for counties)**
  * *http://support.cpseportal.com/kb/a69/parent-caregiver-signature-logs.aspx?KBSearchID=16964*
* **Therapist Activity Report**
  * *http://support.cpseportal.com/kb/a27/therapist-activity.aspx?KBSearchID=16966*

Closing Remarks

* CPSE Portal Address (you may want to bookmark):
  https://www.cpseportal.com

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