

ITEMS THAT PREVENT BILLING
(Billing Admins & Independent Providers)

ITEMS NOT READY TO BE BILLED REPORT:

On a weekly basis, the billing admin should go to ***Billing -> Items Not Ready To Be Billed*** and review this report.

This report will contain the following items:

- **Attendances not signed or co-signed:**
 - Contact the therapist(s) to have them sign their attendances ASAP. Therapists should be signing their notes after they enter them at least on a weekly basis if not sooner.
- **Center Based classroom attendance not signed:**
 - Teachers or billing admins must sign classroom attendance.
- **Unmatched child or unmatched enrollment:**
 - You cannot bill for an unmatched child or unmatched enrollment.
 - Go to ***Caseload Maintenance -> Unmatched Children or View Unmatched Enrollments*** and try to match the child and/or enrollment.
 - If there is a potential or no match, go to ***Reports -> Enrollments Uploaded By County***. Change the filter to the current school year, and see if the county has uploaded the child and/or enrollments to the Portal.
 - If the child is not on the report, then you can contact the county to see when the child and/or enrollment will be uploaded.
 - If the child is on this report, make sure that you have the correct spelling of the child's name, correct school district and DOB.
 - If any of these items are wrong, you will not be able to match the child. You will then need to go ***Caseload Maintenance -> Unmatched Children*** and edit your child to match the counties entry. If the counties entry is wrong, then contact the county to make necessary changes.
- **Attendances are outside of the enrollment dates:**
 - If there are attendances outside of the enrollment dates, those attendances will need to be moved over to the proper enrollment.
 - Below is a link to the Knowledge Base article on ***How to Move Attendances Between Enrollments***:
 - <http://support.cpseportal.com/kb/a444/how-to-move-attendances-between-enrollments.aspx?KBSearchID=23237>
- **Enrollment is rescinded:**
 - If the county has rescinded an enrollment the attendances on the rescinded enrollment can be moved over to the new county enrollment. Follow the steps in the link below on ***How to Move Attendances Between Enrollments***.
 - <http://support.cpseportal.com/kb/a444/how-to-move-attendances-between-enrollments.aspx?KBSearchID=23237>

WHY DOESN'T ATTENDANCES APPEAR TO BE PUT ON A VOUCHER:

When you create your voucher and the child does not appear on the “Unassigned” column, below are some reasons why you cannot bill for the child:

- **Any attendances that do not have a rate cannot be billed.**
 - Go to **Lookup -> Enrollment Lookup**, and filter for the current school year and county.
 - On this report there is a column labeled “Rate”. If your student is missing a rate then contact the county to upload the rate.
- **Any Center Based (CB) children who have not had their attendances entered and signed will not be able to be added to the voucher.**
- **If attendance is on an Unmatched Enrollment you will need to match the enrollment first.**
- **If attendances are missing a Signed Date or Cosigned Date, they will need to be signed first before you can bill for child.**
- **Attendances could already be on another voucher.**
 - Go to **Lookup -> Child Lookup** and search for child.
 - Locate the correct enrollment line and press the blue “Attendances”. If there is a voucher # in the Voucher # column, then those attendances are on that listed voucher #. If that area is blank, then the attendances are not on a voucher.
- **Any attendances that have been added or modified (matched, signed/co-signed, moved over to another enrollment or the rate was added) after the voucher was created will require the voucher to be refreshed and a “Recalc” will be needed.**
 - With the appropriate voucher pulled up, press the “Recalc” button which is found at the bottom of the screen.
 - The newly added or modified attendances should now appear in the Unassigned grid on the Voucher Details Screen.
 - Now you can assign child to the voucher.

The screenshot displays the 'Voucher Details' screen. At the top, there is an 'Info' section with fields for Voucher#, Vendor Invoice#, County Doc #, Billing Date, and Contract Number. To the right of these fields are labels for Description, Authorized C, and Claimant Title, along with an 'Update' button. Below the 'Info' section is a grid with columns for 'Unassigned' and 'Assigned'. The 'Unassigned' column is currently empty. Above the grid, there are filters for 'From Month', 'To Month', 'Service Code', and 'Program Code', along with a 'Filter' button. A red arrow points to the 'Recalc' button at the bottom right of the screen. Below the grid, there is a message: 'For missing entries, try clicking "recalc" or checking Items Not Ready to Bill!'. At the bottom of the screen, there are buttons for 'Return to Voucher Management', 'Recalc', and 'Save'.

SUBMITTING A VOUCHER

PROBLEMS ON VOUCHER:

(If the therapist needs to correct any attendances with a problem, you **MUST** remove the child from the voucher. You will move the child from the Assigned side of the voucher to the Unassigned side of the voucher, and save changes).

Voucher Details

Info

Voucher#: SEIT230221151941
Vendor Invoice#
County Doc #:
Billing Date: 2/21/2023
Contract Number:

Description: SEIT Jan 2023
Authorized Claimant:
Claimant Title: President
Update

January 2023
January 2023

Service Code:
Program Code:

Filter

Unassigned

For missing entries, try clicking "recalc" or checking Items Not Ready to Bill!!

Assign ->

Assigned

	Last Name	First Name	Service Month	Sessions	Amount Billed	ESID
<input type="checkbox"/>			January 2023	12	\$0.00 (R)	SE2223W06
<input type="checkbox"/>			January 2023	0	\$0.00 (R)	SE2223W06

Recalc
Save
View Items Not Ready to Bill

Amount Billed: \$0.00

If are trying to submit a voucher and get “Problems on Voucher”, below are some common reasons why:

- **CB Rescinded:**

- These attendances cannot be billed due to the county rescinding the enrollment. Check to see if there is a new enrollment to move attendances to, if not, then create an unmatched enrollment.

Follow instructions on *How to Move Attendances Between Enrollments*:

- <http://support.cpseportal.com/kb/a444/how-to-move-attendances-between-enrollments.aspx?KBSearchID=23237>

- **SEIT Rate Does Not Match Enrollment. Recalc voucher:**

- Simply “Recalc” the voucher and rate should update.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		1084	9/7/2022	10/27/2022	SEIT	4x30	SEIT Rate does not match Enrollment. Recalc voucher	Attendances

- **SEIT Attendance Minutes Per Session Does Not Match Enrollment:**

- Click on the “Attendances” to see what attendances need to be corrected (see screen shot)
- The screen shot below shows that the therapist entered two 60 minute sessions instead of 1.
- Notify therapist to correct the attendance.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
E		0085	1/3/2023	6/22/2023	SEIT	2x60	SEIT Attendance minutes per session does not match Enrollment	Attendances

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 #	
01/06/23	Provided Treatment Session		Not OK	8:00 AM	9:00 AM	60	2.00	30		Preschool	I	01/19/23	01/19/23	SEIT230221153051	Treatment Log
01/19/23	Provided Treatment Session		Not OK	8:00 AM	9:00 AM	60	1.00	60		Preschool	I	01/19/23	01/19/23	SEIT230221153051	Treatment Log
01/20/23	Provided Treatment Session		Not OK	12:45 PM	1:45 PM	60	1.00	60		Preschool	I	01/20/23	01/20/23	SEIT230221153051	Treatment Log

- **SEIT Units X Minutes Does Not Match Total Minutes:**

- Click on the “Attendances” to see what attendances need to be corrected (see screen shot)
- The screen shot below shows that the therapist entered 1 30 minute session instead of 2.
- Notify therapist to correct the attendance.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		307	9/28/2021	6/23/2022	SEIT	4x30	SEIT Units x minutes does not match total minutes	Attendances

02/03/22	Missed Treatment Session		Not OK	3:30 PM	4:30 PM	60	2.00	30		Daycare	I	02/07/22	02/07/22	SEIT220313194306	Treatment Log
02/07/22	Make Up Session	MU 01/13/22		3:10 PM	4:10 PM	60	1.00	30		Daycare	I	02/11/22	02/11/22	SEIT220313194306	Treatment Log
02/08/22	Provided Treatment Session			3:15 PM	4:15 PM	60	2.00	30		Daycare	I	02/11/22	02/11/22	SEIT220313194306	Treatment Log
02/10/22	Provided Treatment Session			3:20 PM	4:20 PM	60	2.00	30		Daycare	I	02/11/22	02/11/22	SEIT220313194306	Treatment Log

- **Non-verified License Exists:**

- Click on the “Attendances” to see who the service provider is.
- Go to **People -> Service Provider Credential Verification Listing** and verify credentials of therapist.
- Once credentials are verified you will need to “Recalc” your voucher.
- Your county will then approve credentials.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		I	1/4/2023	6/23/2023	ST (Indv)	2x30	Non-verified license exists	Attendances

- **County Has Not Approved Credentials:**

- Click on the “Attendances” to see who the service provider is.
- Contact your county to approve credentials for service provider.
- If you are from Dutchess, Livingston, Rockland, Nassau, Sullivan or Westchester county, then contact McGuinness and we will approve the credentials.

		3	7/4/2022	8/12/2022	ST (Indv)	3x30	County has not approved credentials	Attendances
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- **Details of Prescription/order Not Entered For Enrollment:**

- **This problem will only appear for Dutchess, Livingston, Rockland, Nassau, Sullivan, Ulster and Westchester County.**
- Upload missing prescription for ESID #.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		2211	9/7/2022	6/23/2023	OT (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances

- **Not Co-Signed:**

- Contact supervisor to co-sign notes.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		6	9/6/2022	6/23/2023	CSL (Indv)	1x30	Not Co-Signed	Attendances

- **County Requires a CB Enrollment Attendance Entry Record For Every Weekday of the Month:**

- Teacher and/or billing admin needs to enter and sign attendances.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		0	9/6/2022	12/10/2022	Classroom	5 hrs/day	County requires an CB enrollment attendance entry record for every weekday of the month	Attendances
		0	9/7/2022	12/4/2022	Classroom	5 hrs/day	County requires an CB enrollment attendance entry record for every weekday of the month	Attendances

ATTENDANCE DENIED BY THE COUNTY

HOW TO CORRECT AND RE-BILL:

If the county finds a mistake that has been made on a voucher, the county can deny payment for certain dates of services or the county can reject the entire voucher.

If the county rejects the entire voucher:

- Remove any children from voucher that needs to be corrected, have therapist correct & sign notes.
- Once notes are corrected, then add child back to voucher.
 - “Recalc” the voucher and re-submit to county.

If the county only denies a single service or a few services:

- You will need to email the help desk at Support@CPSEPortal.com, and request that we remove the attendances from the voucher.
 - You should complete the below form, and attach it to your email to the help desk.
 - **RequestToHaveAttendanceRemovedFromSubmittedVouchers.xlsx**

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

IMG1: Example of form to be completed

- You must also let us know in the email that the county is aware that we are removing the attendances from the voucher. Once the attendances are removed, the removal is permanent.
- Once McGuinness removes the attendances:
 - Have the therapist unsign the attendance(s), and make necessary corrections. The therapist will need to resign the attendances.
- Create a new voucher, and re-bill those services to the county.
 - If the attendance does not appear, make sure you do a “Recalc” on the voucher