

JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

MCGUINNESS FULL-SERVICE MEDICAID
New Implementation Guide for Providers

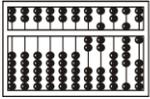
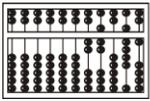


TABLE OF CONTENTS

GENERAL INFORMATION	1
CPSE PORTAL MEDICAID	1
Billing Provider Information	1
Center-Based Related Service (CBRS) Billing	2
Children and Enrollments	2
IEPs and Enrollments	4
Credential Verification.....	4
Document Uploading	5
Non-Compliant and Outstanding Documentation	6
Portal Profiles	8
Reports	9
Verification Process	10
Medicaid-Compliant Prescription Template	14
CPSE PORTAL MEDICAID KNOWLEDGE BASE	15
ONE DRIVE – SECURE FILE STORAGE	17
MCGUINNESS MEDICAID-IN-EDUCATION CONTACT INFORMATION	17
MEDICAID REFERENCES	18



GENERAL INFORMATION

James McGuinness and Associates will now be working with the County as their Medicaid contractor. The transition process will be much smoother if you (the provider) understand the upcoming requirements and when they will be implemented. The information noted below will give you some insight into how McGuinness will interact with your agency to ensure maximum Medicaid claiming for the County.

MEDICAID DOCUMENTATION REQUIREMENTS

In order to submit claims to Medicaid for SSHSP services, certain documentation requirements must be met. The following documentation will be handled through the CPSE Portal and will be tracked and verified by McGuinness.

- Parental Consent Form,
- IEP, and
- Prescription*

Credential Verification*

Verification of current certification, licensure for clinicians providing services must be available upon request; therefore, McGuinness will be expecting all licensed clinicians to complete credential verification* through the Portal.

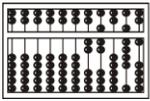
*Required before billing can be submitted.

CPSE PORTAL MEDICAID

Listed below are some of the CPSE Portal Medicaid responsibilities and requirements.

BILLING PROVIDER INFORMATION

Agencies and independent providers have a billing profile in the Portal. It is important that this profile be updated with your billing address and phone number because the information entered is used to auto fill into the digital speech recommendation template in the Portal. If this profile remains blank, SLPs will not be able to complete a digital speech recommendation.



Agencies/Independent Providers can complete the Billing Provider Profile by going to:

My Account>Billing Provider Profile> fill in your agency information – **street, city, state, zip code and phone number (including area code)** >**Update**. Please see screenshot below.

My Account>Billing Provider Profile

CENTER-BASED RELATED SERVICE (CBRS) BILLING

In order to maximize full collection of Medicaid reimbursements, the county will be requiring that preschool providers electronically submit their CBRS billing through the Portal at the same time that the tuition voucher is submitted.

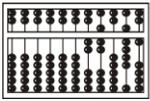
CHILDREN AND ENROLLMENTS

A child’s “official” enrollment is not always created by the county/school district prior to the first day of a school session. Until the “official” enrollment is created a provider can create an “unmatched child” and an “unmatched enrollment” in the Portal. These “unmatched” records are temporary placeholders; they exist so that providers can complete session notes and prescriptions contemporaneously.

1. Add the “Unmatched Child” first. Once the “unmatched” child is created, you will be able to create the enrollment.

CaseLoad Maintenance>Unmatched Children (To match unmatched children or to add an unmatched child. You will also be able to edit this entry after it has been saved by clicking the Edit button.)

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone	Enrollments	Attempt Match	Edit	Delete
C				11/10/2015					NY			Enrollments	Attempt Match	Edit	Delete
C				10/19/2016					NY			Enrollments	Attempt Match	Edit	Delete
C				1/18/2014					NY			Enrollments	Attempt Match	Edit	Delete
C				3/11/2016					NY			Enrollments	Attempt Match	Edit	Delete



2. Add “Unmatched Enrollment” second. Now that the “unmatched” child is created, you will be able to create the enrollment. (Enter the “unmatched enrollment exactly as it appears on the IEP.”)

Caseload Maintenance>Add/Edit Unmatched Enrollment (To add or edit an unmatched enrollment.)

Unmatched Enrollments

County: District: DOB: [Redo Search](#)

Fill in the session, enrollment start and end dates, Enrollment type, RS Type, I/G, frequency, duration, timespan>Click Add

Provider	Session	From	To	Enrollment Type	RS Type	I or G	Units	Minutes	Timespan	Add
	Select Session	Enr. Start	Enr. End	RS	OT/PT/SP		2	30	Weekly	

© James McGuinness & Associates

Once the county (or school district) creates the official enrollment, the **agency** must “match” the temporary “unmatched” record to the official record in the Portal. Once the matching process occurs, the information that was saved to the temporary unmatched record will be moved to the official record and the temporary unmatched record will be deleted.

Caseload Maintenance>View Unmatched Enrollments

Unmatched Enrollments [Select school year.](#)

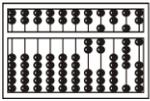
School Year: [All School Years](#) [Retrieve](#)

County	Child Number	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description	Attempt Child Match	Attempt Enrollment Match	Delete
C					20	09/05/1	06/22/1	RS	ST	2x30	Attendances	Attempt Child Match	Delete
C					202021	07/06/20	08/14/20	RS	ST	2x30	Attendances		Delete
C					202021	09/08/20	06/25/21	RS	ST	1x30	Attendances	Attempt Enrollment Match	Delete
C					202021	09/08/20	06/25/21	RS	ST	1x30	Attendances	Attempt Enrollment Match	Delete

Click "Attempt Child Match" or "Attempt Enrollment Match."

If the link is not visible, the official enrollment has not been created yet.

Agencies can use the **Enrollment Uploaded by County Report** on the **Reports Menu** (**Reports>Enrollments Uploaded by County**) to see when the official enrollment was added so they will know when to complete the matching process. Agencies should be completing the matching process on a regular basis (bi-weekly, monthly, etc.) to ensure that the verification of Medicaid documentation can be completed. Until the unmatched records are matched the uploaded documentation may not show on the McGuinness verification screens.



Home File Transfer Activities eSTACs Attendance Billing Caseload Maintenance Lookup Documents Reports Medicaid People

County: Provider: School Year Session: 2020 - 2021 Winter CB CBRS SEIT RS

Added After: Added Before: Retrieve

Select county>school year>CBRS or RS>
enter date in either Added After or Added Before>Retrieve

- Voucher Listings
- Billed Items
- Remittance Batch Details
- Session Listing
- Therapist Activity
- Enrollment Listing
- Child Treatment Log
- Classroom Attendance
- Enrollment Assignments
- Rendering Provider Attestations
- View Child Activities by Therapist
- Enrollments Without Attendance
- CB Enrollments Missing Attendance
- Enrollments Uploaded By County

Tutorials/articles associated with the children and enrollment processes can be found in the Knowledge Base Links Table that follows this section.

IEPS AND ENROLLMENTS

Portal enrollments should mirror the IEP. (i.e., If the IEP has two (2) OT services listed as OT 1x30 (I); the Portal should have two 1x30(I) enrollments. The Portal enrollments should not be entered as 2x30(I); even if the same therapist is providing the service for both. Please keep this in mind when entering “Unmatched Enrollments.”

CREDENTIAL VERIFICATION FOR “ALL” LICENSED THERAPISTS

All licensed therapists “must” verify their credentials through the CPSE Portal before billing can be submitted. In addition, **all licensed therapists “must” have an NPI number** (even if they work under the direction of a supervising clinician) in order to submit billing through the Portal. There is no cost to apply for an NPI number and usually takes 7-10 days. Applicants can use the following website to apply – <https://nppes.cms.hhs.gov/NPPES>.

Therapist’s Home Page

My Professional Profile

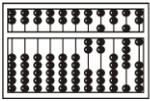
Name: Shannon
NPI: 1003129 (SHANNON)

My License(s)

Profession	License	Original Date Of Licensure	Registered Through Date	License Lookup	Verification Status	Verify
Licensed Speech & Language Pathologist	010654	09/15/1998	12/31/2018	Lookup	REQUIRES VERIFICATION	Verify

My signature
Shannon
Shannon, CCC-SLP

Edit My Profile



Tutorials/articles associated with the credential verification processes can be found in the Knowledge Base Links Table that follows this section.

DOCUMENT UPLOADING

In order to bill Medicaid, the County/McGuinness must have the following documentation uploaded to the Portal for each preschool child before a claim can be submitted to Medicaid:

- 1) Parental Consent Form,
- 2) Individual Education Plan (IEP), and
- 3) Prescription (*Written Order/Referral Prescription, Speech Recommendation*).

Each document type must be uploaded to the Portal so McGuinness can verify that all the requirements are in place for Medicaid claiming. A simple upload process will be followed for each document type. Tutorials for these processes can be accessed from the Portal Knowledge Base using the links shown below.

➤ **HOW TO UPLOAD A CONSENT FORM**

<http://support.cpseportal.com/kb/a189/uploading-a-medicaid-consent-form.aspx>

The County will determine who will upload the Parental Consent Form (county, school district or agency). The responsible party for uploading the Parental Consent Form will be expected to upload one of the following documents for each preschool child:

- A completed, signed and dated Parental Consent Form,
- A Parental Refusal, which can be a blank Parental Consent Form with a note that indicates that the parent refused to sign, or
- A Failure to Obtain Form that indicates that all options have been exhausted in obtaining the Parental Consent Form.

➤ **HOW TO UPLOAD AN IEP**

<http://support.cpseportal.com/kb/a190/uploading-an-iep.aspx>

The County will determine who will be responsible for uploading the IEP (county, school district or agency).

During the IEP upload process, the responsible party should check to ensure that all the Portal enrollments (for your agency) match with an uploaded IEP.

➤ **HOW TO UPLOAD A PRESCRIPTION (Two Options – Hard Copy & Digital)**

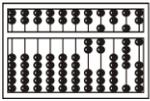
1) – Hardcopy Option: Uploading (& Troubleshooting) Prescription Documentation

<http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=10123>

2) – Digital Option: Creating a Digital Speech Recommendation (for SLPs)

<http://support.cpseportal.com/kb/a163/creating-a-digital-speech-recommendation.aspx>

Prescriptions will be uploaded by an agency or therapist. Prescriptions must be prospective (*meaning prior to the first session*) and must be kept on file.



The Portal has two methods for uploading prescriptions.

1) **Paper Document Upload Process**

Before someone can upload a prescription to the Portal, the prescription must be scanned and saved to their computer.

The hard copy prescription can be uploaded from three different menus in the Portal:

1. Lookup>Child Lookup (*use this option for a single Rx entry*)
2. Caseload Management>Prescriptions for Caseload (*for therapists*)
3. Medicaid>Prescriptions>Prescription Entry Maintenance (*for billing admins*)

The link shown above, [Uploading \(& Troubleshooting\) Prescription Documentation](#), delineates step-by-step instructions for uploading a prescription from all three menus.

2) **Digital Speech Recommendation Process**

A digital speech recommendation can be entered by an SLP directly into the Portal. The digital speech recommendation will be digitally signed and dated on the date it is created. The link shown above, [Creating a Digital Speech Recommendation](#), delineates step-by-step instructions for creating a digital speech recommendation. Using the digital option will be a benefit to the county and will limit requests for outstanding prescriptions for the therapist and/or agency. Why is this option a benefit?

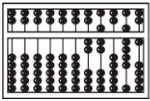
- When successfully generated in the Portal, the digital option will always produce a Medicaid-compliant recommendation.
- The resulting recommendation does not have to be printed, scanned, uploaded and entered into the Portal; it is verified upon completion.
- Six of the eight required components of a Medicaid prescription are auto-filled into the digital speech recommendation template (*all the child's demographic information, time period of the order services, therapist's NPI and License numbers and therapist's contact information*) when the "[create speech recommendation](#)" link is activated. The SLP will only need to enter the ICD code(s) and digitally sign the recommendation with their CPSE Portal Pin #.

NON-COMPLIANT DOCUMENTATION

If uploaded documentation does not meet Medicaid requirements, the provider will receive notification from McGuinness regarding what is required to ensure Medicaid claiming.

OUTSTANDING DOCUMENTATION

Several times throughout the school year (usually quarterly) McGuinness will contact you with a list of "outstanding" documentation that is required for Medicaid claiming. Please respond to this notification at your earliest convenience to ensure that Medicaid claims are processed within the limited claiming period.



How do you determine which documentation is outstanding? There are several reports in the Portal that list specific enrollments (ESIDs) that are “missing” documentation and as a result preventing a Medicaid claim from moving forward.

- Medicaid>Missing Documents> Missing Scripts
- Medicaid>Missing Documents> Missing Consents
- Medicaid>IEP Documents>Missing IEPs
- Medicaid>Missing Documents> Missing Documents Preventing Claiming – This report shows outstanding documentation for all three mandated documents for claiming (Parental Consents, Prescriptions and IEPs).

All of these reports can be exported to Excel and have filters so you can see the outstanding documentation for a specific period of time. (*i.e., Summer Session, Winter Session, Previous School Year, etc.*)

Providers/agencies should run these reports routinely to ensure that Medicaid claiming is not interrupted.

OUTSTANDING DOCUMENTATION AND ENROLLMENTS WITHOUT ATTENDANCES

Sometimes an enrollment is created in the Portal, but for various reasons may not be used (*e.g., An agency accepts a referral, then realizes they cannot secure a therapist and subsequently declines the referral.*). Please notify the county (or school district) of any enrollments that may have been created for your agency that will not be used. As long as an ESID # remains active in the Portal, the ESID # will be included on all requests (to agencies/providers) for outstanding documentation. Having the enrollment rescinded will save time when answering requests for outstanding documentation.

Let’s take a look at what is required for outstanding documentation by document type.

- **Outstanding Parental Consent Forms**

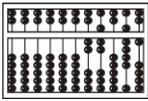
The county will determine who will upload the Parental Consent Form (county, school district or agency). The responsible party for uploading the Parental Consent Form will be expected to upload one of the following documents:

- A completed, signed and dated Parental Consent Form,
- A Parental Refusal, which can be a blank Parental Consent Form with a note that indicates that the parent refused to sign, or
- A Failure to Obtain Form that indicates that all options have been exhausted in obtaining the Parental Consent Form.

If one of the three documents noted above are not uploaded to each preschooler’s record in the Portal, it will appear on a report for missing consent forms.

- **Outstanding Individual Education Plans (IEPs)**

Even though an IEP is “one” document, the IEP is not verified in its entirety as a single document. Each service line on the IEP must be matched to a coordinating Portal enrollment (ESID #). If there is a Portal enrollment that does not match an uploaded IEP, that particular ESID number will show as outstanding on the *Missing IEPs Report* or *Missing Documents Preventing Claiming Report*. This is important to note because a child that is delineated on the list of outstanding IEPs may already have an IEP that was uploaded to the Portal. The uploaded IEP; however, may not include the



mandate that matches the Portal ESID # that is missing an IEP. The missing documentation report that you will receive from McGuinness will list the Portal enrollment information (the specific ESID #) that is missing an IEP.

Particular attention should be directed to the **ESID, Service, and the From/To Date columns**, which will tell the provider the exact enrollment that is missing an IEP. The From/To Date columns will tell you the specific IEP that is missing. It is important to note that the initial IEP is not always the one that is missing. A child may have a CPSE meeting at some point during the school year where a particular service is added and/or changed and that particular IEP was not uploaded after the new enrollment was created. Or, the initial IEP was amended and the amended IEP was never uploaded.

Sample List

Provider	District	ESID	Service	From Date	To Date	Need IEP	Need Consent	Need Script
	WANTAGH UFSD	RS1920W0162	PT	09/03/19	06/26/20	YES		

If an ESID number is listed on this report (as shown above) that means that the Portal does not have an uploaded IEP with this particular mandate. The CPSE Portal Enrollment screen will show you the specifications for each enrollment.

- **Outstanding Prescriptions**

The agency or therapist will be responsible for obtaining and uploading the prescription/speech recommendation. (If the school district is providing the preschooler’s prescription, it is important to note that the therapist/agency should have a copy of that prescription **“in hand”** before providing the service. The school district will not be uploading the prescription to the Portal.)

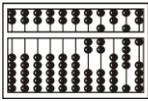
If a prescription has not been uploaded (paper or digital), the ESID number for that child will show on a report for missing prescriptions. The agency and/or therapist can expect notification from McGuinness that the prescription is missing and required for Medicaid claiming. In addition, until a prescription has been uploaded, billing will not be able to be submitted through the Portal.

PORTAL PROFILES – (One-Time Set-Up)

Therapists are expected to complete a “user profile” and create a CPSE Portal Pin # (if not already completed) so Medicaid documentation can be completed and signed. This user profile information also auto fills into the digital speech recommendation template with “required” prescription information for Medicaid.

(My Account>My Profile & My Account>My Pin)





My Profile

Personal and Professional | User Information | Favorites

Information in CPSE Database

Last Name: Stark
 First Name: Shannon
 NPI: 1003129438
 Signature, Title, and Credentials: Shannon Stark, M.A. CCC/SLP

Information from NPPES NPI Registry

NPI: 1003129438 This NPI is for an Individual

First Name: SHANNON
 Last Name: STARK
 Credentials: M.A. CCC/SLP

Mailing Address 1: 205 CROCKER HILL RD
 Mailing Address 2:
 City: BINGHAMTON State: NY Zip: 139042513

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"/>	Edit	Remove

Add

Billing providers (agencies/independent providers) should complete their billing profile in the Portal because this information also auto fills into the digital speech recommendation template with “required” prescription information for Medicaid. SLPs will not be able to create a digital speech recommendation if this is not completed.

(My Account>Billing Provider Information>Provider Info Tab)

My Account | Knowledge

Change Password
 User Account Details
 My Credential Verifications
 My Profile
 My PIN
 Billing Provider Profile
 Generate Attestations
 Bulk Attestations
 My Articles
 My Configuration

Billing Provider Profile

Provider Info | User Information

Billing Provider
 Name:

Billing Address
 Address 1:
 Address 2:
 City: State: Zip:
 Phone Number:

Update

REPORTS

Service Provider Credential Listing Report

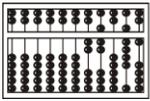
The Service Provider Credential Listing will give you a report of service providers and their credential information. This report can be exported to Excel.

Sample report shown below.

Service Providers Listing with Credentials

Filters
 County: NASSAU Provider: Retrieve
 Active on: 5/21/2020

Last Name	First Name	NPI	NPI Status	NPI Registry Name	Profession	License	Original Issue Date	Registered Through Date	Cert #	Username	
	Jessica	128596			Licensed Speech & Language Pathologist	021					Edit
	Erin				Special Education Teacher						Edit
	SUZANNE				Special Education Teacher						Edit



Outstanding Documentation Reports

The Portal has several reports that can be run periodically (by the county or agency) to determine if an agency or therapist has outstanding documentation.

- Medicaid>Missing Documents> Missing Scripts
- Medicaid>Missing Documents> Missing Consents
- Medicaid>IEP Documents>Missing IEPs
- Medicaid>Missing Documents> Missing Documents Preventing Claiming – This report shows outstanding documentation for Parental Consents, Prescriptions and IEPs.

All of these reports can be exported to Excel and have filters so you can see the outstanding documentation for a specific period of time. (*i.e., Summer Session, Winter Session, Previous School Year, etc.*)

Providers/agencies should run these reports routinely to ensure that Medicaid claiming is not interrupted.

VERIFICATION PROCESS

As mentioned previously, in order to bill Medicaid, the County/McGuinness must have the following documentation for each Medicaid-eligible child before a claim can be submitted to Medicaid:

- 1) A (signed/dated) Parental Consent Form,
- 2) An Individual Education Plan (IEP) for each Medicaid related service enrollment (ESID #) in the Portal, and
- 3) A (signed/dated) Medicaid-compliant Prescription).

In order to ensure that McGuinness is submitting claims that meet Medicaid requirements, all Medicaid documentation will be reviewed (by McGuinness) for all preschool children in the county. When McGuinness receives and verifies all the required Medicaid documentation, a claim will be submitted to Medicaid. (***Please note: Medicaid documentation must be submitted for “ALL” preschool children, whether or not the child is currently receiving Medicaid.***)

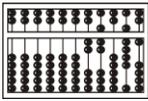
Let's take a look at the verification process for each document type.

- **Parental Consent Form Verification**

McGuinness will review the uploaded Parental Consent Form and, if it meets Medicaid requirements, will be verified for claiming. If the document does not meet Medicaid requirements, the document will be deemed “invalid/non-compliant.” Medicaid claiming cannot move forward without a signed Parental Consent Form.

- **Individual Education Plan (IEP) Verification**

It is important to note that even though an IEP is one document, the entire document is not verified as a single document. Each service line on the IEP must be matched to the coordinating enrollment in the Portal. If the Portal enrollment and the IEP do not match exactly, that particular Portal enrollment (ESID#) will not be verified for Medicaid claiming.



Each Medicaid related service enrollment (each ESID #) must be matched to an IEP with the same mandate. There can be multiple IEPs uploaded to coordinate with all the Portal enrollments for a child. The following information will be reviewed during the verification process.

- ✓ Child's **name** (correct child's IEP was uploaded)
- ✓ Child's **date of birth** (DOB in the Portal must match the DOB on the IEP)
- ✓ Child's **school district** (the school district of the IEP will be matched to the information on the Portal verification screen to ensure that an IEP for another school district was not erroneously uploaded.)
- ✓ **Each service line** (mandate) on the IEP should have a Portal enrollment where the service, service dates, service frequency/duration and service setting (Individual/Group) match.
- ✓ Each Medicaid-eligible related service enrollment must have an IEP with a matching mandate that is uploaded to the Portal. This could mean that more than one IEP is uploaded for a child in a particular school year.

Example noted below:

The first related service listed on the IEP below is **Speech Language Therapy: Individual – 2/10/2020 to 06/26/20 – 3x30**. Is there a matching Portal enrollment for this mandate? Yes.

The second related service listed on the IEP below is **Physical Therapy: Individual – 2/10/2020 to 06/26/20 – 2x30**. Is there a matching Portal enrollment for this mandate? Yes.

You will also notice that there are two additional Portal enrollments that do not match the uploaded IEP (*service dates are different – 1/6/20*). Only two of the four Portal enrollments can be verified to the uploaded IEP. The 1/6/20 Portal enrollments, that cannot be verified to this particular IEP, may have already been verified to an IEP that was uploaded previously or the IEP that coordinates with those dates of service may not be uploaded (*outstanding*) and still required for Medicaid claiming.

Portal – Verification Screen

Uploaded IEP

Child's IEPs

School Year	Effective Date	Uploaded Date	Verified By	Verified Date	Invalidate
201920	02/10/20	04/07/20	dfrank	04/08/20	Select
201920	02/10/20	05/13/20	dfrank	05/18/20	Select
201920	02/10/20	05/13/20	dfrank	05/18/20	Select

Verification

Provider	ESID	From Date	To Date	Service
<input type="checkbox"/>	RS1920W01666	01/06/2020	01/21/2020	ST 2x30 Individual
<input type="checkbox"/>	RS1920W01666	01/06/2020	06/26/2020	PT 2x30 Individual
<input checked="" type="checkbox"/>	CBRS1920W000	02/10/2020	06/26/2020	PT 2x30 Individual
<input checked="" type="checkbox"/>	CBRS1920W000	02/10/2020	06/26/2020	ST 3x30 Individual

Effective Date: 2/10/2020

Uploaded IEP

Wantagh, NY 11793

Student Information:
 Student: [Redacted] Date of Birth: [Redacted] Gender: Male ID #: 760836488
 Address: [Redacted] Age as of meeting date: 3:1 Native Language: English
 County: [Redacted] Interpreter Required: No
 Home/Mobile #: [Redacted] Work #: [Redacted] Email: [Redacted]
 School Year: 2019-2020 Placement: Approved Preschool Special Education Program School: [Redacted] Email: [Redacted]
 Special Alerts: [Redacted] Grade: Preschool

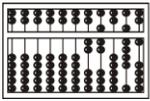
IEP INFORMATION:
 Projected IEP Start Date: 02/10/2020
 Projected IEP End Date: 06/26/2020
 Projected Date of Annual Review: 06/26/2020
 Date of IEP Reevaluation: 12/17/2022
 Extended School Year: No
 Behavior Intervention Plan: No
 Supplementary Aids and Services: No
 Assistive Technology: No
 Supports for School Personnel: No
 Testing Accommodations: No
 Participate State/District Assessments: N/A
 Special Transportation: Yes

SUMMARY-SPECIAL EDUCATION PROGRAMS AND RELATED SERVICES:
 Special Class in an Integrated Setting: 12:1-2 02/10/2020 - 06/26/2020 5 x Weekly, 5hr Classroom
 Speech Language Therapy: Individual 02/10/2020 - 06/26/2020 3 x Weekly, 30min. Therapy Room
 Physical Therapy: Individual 02/10/2020 - 06/26/2020 2 x Weekly, 30min. Therapy Room

MEETING INFORMATION:
 Date: 1/28/2020 Committee: Committee on Preschool Special Education Decision/Status: Classified Preschool
 Reason: Program Review Classification: Preschool Student with a Disability
 Preschool Service Coordination:
 Participants: Dr. Roberta Kupetz, Chairperson; Hanan Ahmed, Mother; Jessica Silikas, Just Kids, Administrator
 Comments: [Redacted]

• **Prescription Verification**

The agency or therapist will be responsible for obtaining and uploading the prescription/speech recommendation. (If the school district is providing the prescription, it is important to note that the therapist/agency must have a copy of that prescription “in hand” before providing the service. The



therapist and/or the agency may be asked for a copy of the prescription in the event of an audit. (The school district will not be uploading the prescription to the Portal.) A prescription must be uploaded before a bill can be submitted through the Portal.

What is McGuinness looking for when they verify a prescription? Page 21 of the Medicaid Provider Policy and Billing Handbook (Update 9) lists the required (8) eight elements that are required on a Medicaid Prescription. The Handbook also lists information regarding the “Life of a Written Order.”

The written order/written referral (prescription) is the documentation that establishes medical necessity for the related service to be furnished and constitutes medical direction of the ordering professional. In order to bill Medicaid, a written order/written referral from a qualified Medicaid provider is required. Written orders/written referrals must be prospective and must be kept on file. Faxed copies of the written order/referral are acceptable.

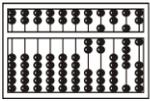
The following (8) elements must be included on a written order:

1. The **name of the child** for whom the order is written;
2. The **complete date** the order was written and signed;
3. The **service(s)** being ordered. Note: The **frequency and duration** of the ordered service must be either specified on the order itself **or** the order can explicitly adopt the frequency and duration of the service in the IEP by reference (**As per IEP**);
4. **Ordering provider’s contact information** (office stamp or preprinted address and telephone number);
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 his or her scope of practice, and
 - a. only for speech therapy services this also includes a NYS Medicaid enrolled provider who is a licensed and registered speech-language pathologist**
 - b. only for psychological evaluation and counseling services this includes a NYS Medicaid enrolled provider who is a licensed and registered psychologist, and/or an appropriate school official (school officials are not allowed nor required to enroll in NYS Medicaid);
6. The **time period** for which services are being ordered;
7. The ordering practitioner’s **National Provider Identifier (NPI)** or **license number**; and,
8. **Patient diagnosis** and/or reason/need for ordered services(s).

Life of a Written Order – Page 22 of the Medicaid Provider Policy and Billing Handbook (Update 9)

A written order/referral is required for Medicaid reimbursement for medically necessary services included in the IEP. The written order/referral for service(s) must be obtained whenever there is a change to a medically necessary service being furnished to a student pursuant to the student’s Individualized Education Program (IEP), this includes but is not limited to changes to the frequency or duration for the service(s), if the service changes from individual to/from group, and when the annual review is completed and the student’s next IEP is developed.

There must be a valid written order/referral annually or whenever there is a change in the services when Medicaid is being billed.



For example:

A written order, dated **5/5/10**, for physical therapy for the time frame of **7/1/10 – 6/30/11** is received by the Committee on Special Education (CSE).

On **5/16/10** the CSE met and developed the IEP for the 2010 - 2011 school year and included physical therapy in the IEP for **3 sessions a week**. After the student's most recent physical therapy evaluation (November 2010), the CSE agreed to decrease services to **2 sessions a week**. Because this is a **change** in both the **IEP** and **treatment**, a new written order must be obtained in order for Medicaid to be billed.

When a student with an IEP transfers from one district to another the new home district may adopt the student's IEP from the prior district – for continuity of services – until they have an opportunity to hold a CSE meeting and develop a new IEP. In these instances, the existing IEP and written orders/referrals (that haven't expired, aren't over a year old) would still be considered valid for Medicaid reimbursement as long as all other Medicaid requirements are satisfied, until such time that the existing written orders/referrals expire, or the next IEP is written (whichever comes sooner).

In summary a new written order/prescription is required under the following circumstances:

- ✓ **New referrals** (Newly-identified students)
- ✓ **Each IEP period** (Annual Review, summer session/winter session if not listed on the same IEP)
- ✓ Whenever a review meeting results in a **change of service** (frequency/duration/class size – including a decrease in services)
- ✓ The **child transfers to another school district** (This requires a new IEP so a new order/prescription is required.)

***Annual Review *Change in Service *Transfer *New Referral**

Important Note: The "As per IEP" reference no longer applies once the IEP changes. A new order is required for any of the circumstances listed above.

MEDICAID-COMPLIANT PRESCRIPTION TEMPLATE

The link below will bring you to a Medicaid-compliant "sample" template (Portal Knowledge Base) that is filled out in accordance with Medicaid guidelines. (Please see a screenshot of the "sample" prescription template on the next page.)

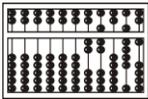
Medicaid-Compliant Written Orders – "Sample" Template:

<http://support.cpseportal.com/kb/a174/medicaid-compliant-written-order-sample-template.aspx>

A blank customizable prescription template is also available from the Portal Knowledge Base. The blank prescription template can be customized with the agency's address and phone number using the space provided in the heading of the form.

Medicaid-Compliant Written Order – Blank (customizable) Template:

<http://support.cpseportal.com/kb/a172/medicaid-compliant-prescription-template.aspx>



Medicaid-Compliant Prescription Template – CPSE Portal Knowledge Base

SPACE FOR SCHOOL/AGENCY INFORMATION

(You can list your company address and phone number here to be sure that it is included on the order.)

PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided as specified in the Individualized Education Program (IEP) designed by the Committee. (Check one or both as required) Evaluation Services

Student Name John Smith DOB 1/2/15

District Optional County Optional

Agency Optional
(Agency, Center-based Program or Individual Provider)/Phone

(Check One)
Reason for Rx: Annual Review Meeting Change in Service Transfer Meeting Re-Eval Meeting New Referral

(Required)
Term of Service: School Year July 1, 2019 to June 30, 2020 (Frequency, Duration & Class Ratio as per the IEP)

Evaluation/Service	<small>(Required)</small> ICD CODE for EVALUATION(S)	<small>(Required)</small> ICD CODE for SERVICE(S) *	Medical Diagnosis/Purpose of Treatment
Audiological			
Occupational Therapy			
Physical Therapy			
Speech		F80.2	Mixed receptive-expressive language disorder.
Psychological/Psychological Counseling			
Skilled Nursing <small>(Requires a Physician's Order)</small>			

*The most specific ICD code is required for each evaluation/service.
Medicaid requires that a written referral be in place prior to the initiation of evaluations/services.*

* An order/referral for services must be completed for each IEP period.
A new order/referral must be completed whenever a review conducted during an IEP period results in a change in service (i.e., frequency/duration/ratio).

Signature Handwritten Signature or Electronic Signature Only Date Signed Date is Required
Original Signature Required – Stamps Not Permitted (REQUIRED) (Required)

Print Name PRINT NAME HERE (Stamp Accepted) Title M.D.

Address & Phone (Required) – (Stamp Accepted)

REQUIRED: COMPLETE ADDRESS & PHONE #

ABC Agency
123 Main St.
New York City, NY 12345
(000) 123-4567

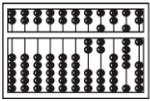
(Required) License # 123456 (REQUIRED)

(Required) NPI # 1234567890 (REQUIRED)

Medicaid # _____

Fax # _____

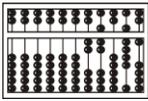
(Signature of NYS licensed and registered physician, a physician or a licensed nurse practitioner acting within the scope of practice (for psychological counseling services this also includes an appropriate school official and for speech therapy services, a speech-language pathologist who has seen the child.)



CPSE PORTAL MEDICAID KNOWLEDGE BASE

Listed below is a list of CPSE Portal Knowledge Base Articles and Webinars that will assist providers/agencies with Medicaid responsibilities. The articles/webinars are categorized as noted in the table below. Links for each of these articles follow this table.

Knowledge Base Articles/Webinars	Description
Children & Enrollments	Therapists and agencies will use these articles to set up and manage temporary enrollments that are created by the therapist or agency. These temporary enrollments will be subsequently matched by the agency so that children can be serviced contemporaneously prior to the creation of the "official" enrollment.
Credential Verification & How to Apply for an NPI #.	In order to be compliant with Medicaid requirements, we need to make sure that therapists are up to date with their credentials. These articles will assist therapists and agencies as well as Portal users without a CPSE Portal login to manage their license and NPI information. Credentials must be verified before billing can be submitted in the Portal.
Lookup	Articles under Lookup will give you information regarding, children, enrollments, CPT/ICD, etc.
Medicaid New Implementation Guide (for providers)	This guide will help providers understand the requirements of Full-Service Medicaid with McGuinness.
Medicaid Compliance	We have put together many articles and webinars to help agencies and providers with Medicaid compliance. You will find the following items under this category: <ul style="list-style-type: none"> • a webinar and PowerPoint Presentation on Medicaid-Compliant Written Orders, • a prescription checklist detailing the valid versus invalid way to complete a Medicaid prescription, • a blank Medicaid-compliant prescription template and sample prescription template, and, • links to the Medicaid Provider Policy & Billing Handbook and the Medicaid Questions and Answers. <p>These resources will be very helpful with your Medicaid-related responsibilities.</p>
Medicaid Reports (for Documentation)	These reports will help you to determine the documentation that is "missing" (<i>consents, prescriptions, IEPs</i>) and as a result preventing Medicaid claiming.
Prescriptions	There are many articles related to prescriptions. You will find the following under this category: <ul style="list-style-type: none"> • "How To" Articles, • Articles that will help you with Medicaid compliance as it relates to prescriptions/verifications and, • Troubleshooting
Uploading Documentation	These articles will assist you with the processes required for uploading Consent Forms, IEPs and Prescriptions.
User Information	These articles will help you with getting started in the Portal. <ul style="list-style-type: none"> • Choosing a PIN #, • Entering your signature and credential information, and, • Initial set-up
Webinars	These links will bring you to various webinars.



CPSE PORTAL MEDICAID KNOWLEDGE BASE LINKS

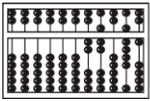
New Implementation Guide for McGuinness Full-Service Medicaid (for Providers)

<http://support.cpseportal.com/kb/a232/mcguinness-full-service-medicaid-new-implementation-guide-for-providers.aspx>

How to Submit a Ticket to the CPSE Portal:

<http://support.cpseportal.com/kb/a188/how-to-submit-a-ticket-to-the-cpse-portal.aspx>

ARTICLE / TUTORIAL / WEBINAR	LINK
CHILDREN & ENROLLMENTS	
Enrollments Added by County	http://support.cpseportal.com/kb/a182/enrollments-added-by-county-report.aspx
Entering Unmatched Children and Unmatched Enrollments	http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx
Matching Unmatched Children and Enrollments	http://support.cpseportal.com/kb/a175/matching-unmatched-children-and-enrollments.aspx
View Unmatched Enrollments	http://support.cpseportal.com/kb/a184/view-unmatched-enrollments.aspx
Editing an Unmatched Child	http://support.cpseportal.com/kb/a124/editing-an-unmatched-child.aspx
CREDENTIAL VERIFICATION	
Credential Verification Webinar	http://support.cpseportal.com/kb/a166/credential-verification.aspx
Credential Verification - Agencies	http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx
Credential Verification - Providers	http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx
Credential Verification – No Portal Login	http://support.cpseportal.com/kb/a151/credential-verification-no-cpse-portal-login.aspx
Service Provider Credential Verification Listing	http://support.cpseportal.com/kb/a224/credential-verification-listing-approval-listing-reports.aspx?KBSearchID=13730
Website to Apply for an NPI Number	https://nppes.cms.hhs.gov/NPPES
LOOK-UP	
How to look up a child by ESID #	http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid.aspx
MEDICAID COMPLIANCE	
Medicaid-Compliant Written Orders Webinar Recording	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx
Medicaid-Compliant Written Orders PowerPoint Presentation	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx
Medicaid-Compliant Written Orders Webinar Q & A	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx
Medicaid-Compliant Written Order Verification Checklist	http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx
Medicaid-Compliant Written Order - Sample	http://support.cpseportal.com/kb/a174/medicaid-compliant-written-order-sample-template.aspx
Medicaid-Compliant Written Order Blank Template	http://support.cpseportal.com/kb/a172/medicaid-compliant-prescription-template.aspx
Medicaid Provider Policy & Billing Handbook	http://www.oms.nysed.gov/medicaid/handbook/sshsp_handbook_9_march_21_2018_final.pdf
Medicaid Questions & Answers	http://www.oms.nysed.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf
MEDICAID REPORTS (FOR MISSING DOCUMENTATION)	
Missing Documents Preventing Claiming	http://support.cpseportal.com/kb/a191/missing-documents-preventing-claiming-report.aspx
Missing Parental Consents	http://support.cpseportal.com/kb/a99/missing-medicaid-parental-consents.aspx
Missing IEPs	http://support.cpseportal.com/kb/a186/missing-ieps-report.aspx
Missing Prescriptions	http://support.cpseportal.com/kb/a187/missing-prescriptions-report.aspx
PRESCRIPTIONS	
How to Create a Digital Speech Recommendation (Entering Unmatched Children and Unmatched Enrollments may be required for this process.)	http://support.cpseportal.com/kb/a163/creating-a-digital-speech-recommendation.aspx
Prescription Verification Checklist (for Medicaid)	http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx
Prescription Requirements for Medicaid	http://support.cpseportal.com/kb/a179/prescription-requirements.aspx
Uploading & Troubleshooting Prescription Documentation	http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=10123



UPLOADING DOCUMENTATION

Medicaid Documentation Requests/Upload Process	http://support.cpseportal.com/kb/a98/medicaid-documentation.aspx?KBSearchID=13729
Uploading Consent Forms	http://support.cpseportal.com/kb/a123/uploading-parental-consents.aspx
Uploading a Medicaid Consent Form (Aug 2019)	http://support.cpseportal.com/kb/a189/uploading-a-medicaid-consent-form.aspx
Uploading an IEP (Aug 2019)	http://support.cpseportal.com/kb/a190/uploading-an-iep.aspx
Uploading & Troubleshooting Prescription Documentation	http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=10123
Unidentified File Upload Process	http://support.cpseportal.com/kb/a181/unidentified-file-upload-process.aspx
USER INFORMATION	
Choosing a Pin	http://support.cpseportal.com/kb/a197/managing-your-pin.aspx
Entering Signature, Title & Credentials	http://support.cpseportal.com/kb/a25/entering-signature-title-and-credentials.aspx
Initial Set-up	http://support.cpseportal.com/kb/a40/initial-setup.aspx
WEBINARS	
Credential Verification Webinar	http://support.cpseportal.com/kb/a166/credential-verification.aspx
Creating a Digital Speech Recommendation	http://support.cpseportal.com/kb/a163/creating-a-digital-speech-recommendation.aspx
Medicaid-Compliant Written Orders	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx

ONE DRIVE – SECURE FILE STORAGE

McGuinness began using Microsoft One Drive recently to send HIPAA/FERPA-sensitive information to providers. One Drive is a secure file storage service that offers a simple way to store, sync and share various types of files with other people using any web browser from your computer, tablet or cell phone. Using this method of transmission allows McGuinness to send you protected information and include the child’s name and demographic information while staying compliant with HIPAA and FERPA. Any protected information will be sent to you using a secure link that will be delivered via email.

MCGUINNESS MEDICAID-IN-EDUCATION CONTACT INFORMATION

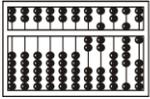
James McGuinness and Associates
1482 Erie Boulevard
Schenectady, NY 12305
Phone: **518-393-3635**
Fax: 518-393-9938

Timothy Frament
Vice President – Government Solutions
Email: tframent@jmcguinness.com

Deborah Frank
Medicaid Specialist
Email: dfrank@jmcguinness.com
Extension: 41

CPSE Portal: www.cpseportal.com
CPSE Portal Support: Support@cpseportal.com
CPSE Portal Knowledge Base: Support@cpseportal.com

Any questions regarding the implementation process should be addressed to:
Deborah Frank, Medicaid Specialist
518-393-3635, Ext. 41



MEDICAID REFERENCES

Medicaid Questions & Answers

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

Medicaid Policy & Billing Handbook (Update 9)

http://www.oms.nysed.gov/medicaid/handbook/sshsp_handbook_9_march_21_2018_final.pdf