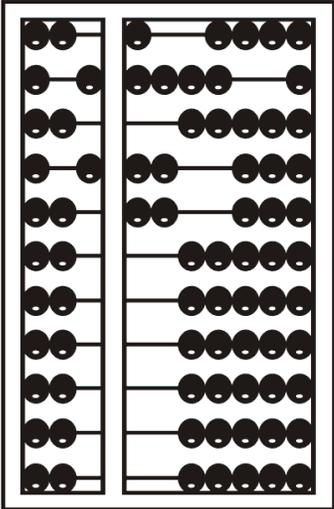


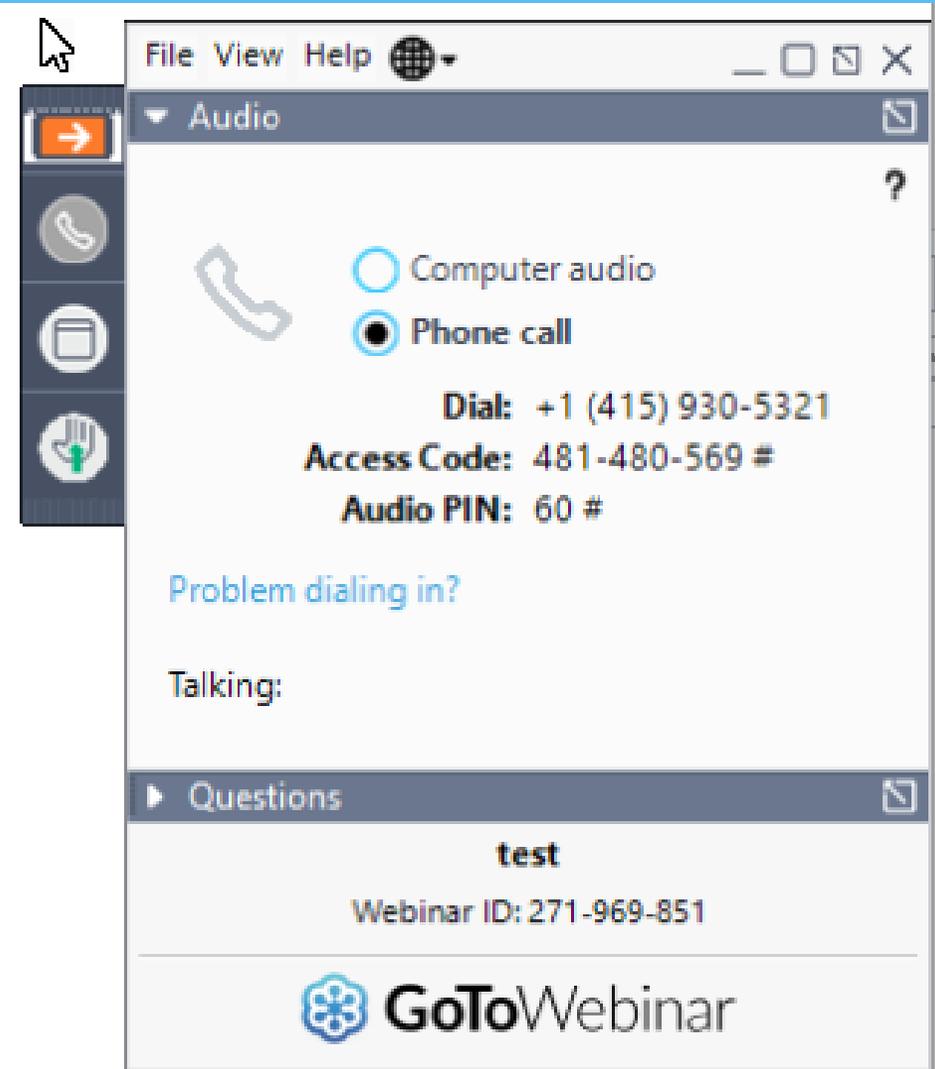
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Consultants



# Using GotoWebinar

# Goto Webinar Control Panel

- \* Control panel is on far right of screen
- \* Orange button with white arrow expands and shrinks control panel

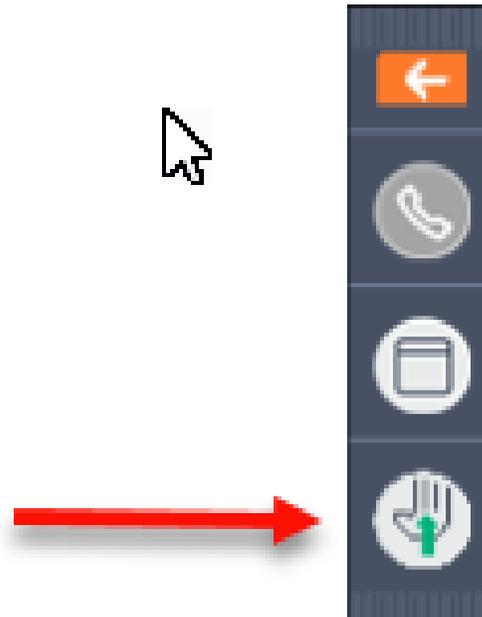


# Communicating with Presenter

- \* All participants are on mute
- \* Two ways to communicate with us
  - \* 1-Raise your hand
  - \* 2-Type in a question
- \* You can raise your hand in response to a question we ask
- \* You can raise your hand if you would like us to take you off mute so you can ask speak
- \* You can type in question in the question box

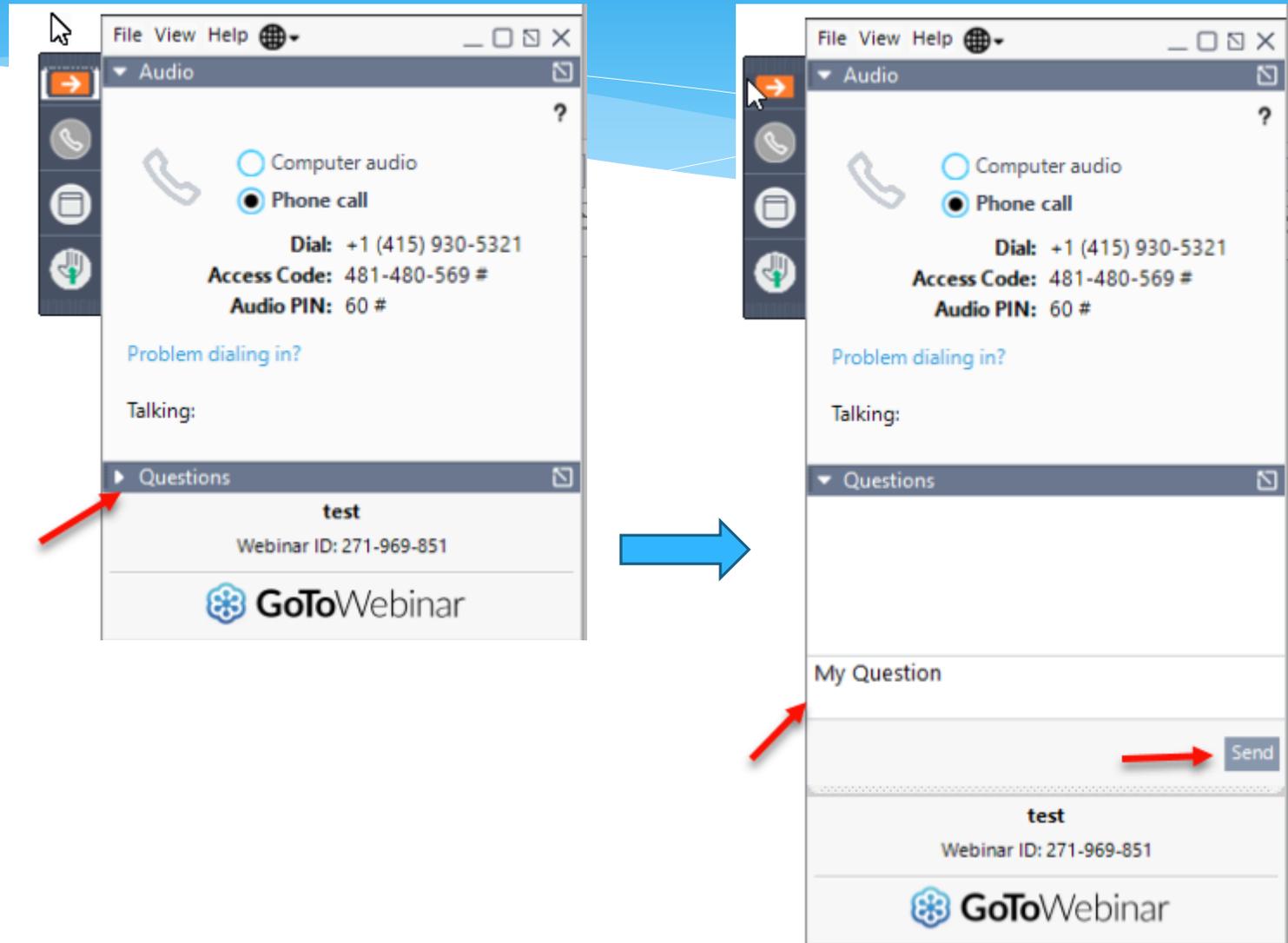
# Raising your hand

- \* On bottom left of control panel is a button with a hand icon
- \* Click that button to raise your hand

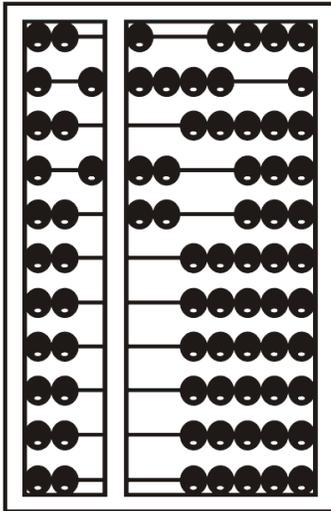


# Typing in a Question

- \* Click the question bar to expand questions section
- \* Type in your question and click send



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# UPLOADING MEDICAID DOCUMENTATION (Live Training)

# Topics Covered

## Entering Temporary Children & Enrollments

- ✓ Creating “Unmatched Children & Enrollments”
- ✓ Matching “Unmatched Children & Enrollments”

## Uploading Medicaid Documentation

- ✓ Documentation should be uploaded to include the summer session – 7/1/20
- ✓ Documentation Requirements
- ✓ Uploading Medicaid Documentation
- ✓ Printing & Troubleshooting Medicaid Documentation

## Reports

- ✓ Outstanding Documentation Reports

## McGuinness Medicaid-in-Education Contact Information

## Medicaid References

# Entering Temporary Children & Enrollments

- ❑ A child's "official" enrollment is not always created prior to the first day of a school session. Until the "official" enrollment is created providers can create an "Unmatched Child" and an "Unmatched Enrollment."
- ❑ These "unmatched" records are temporary placeholders; they exist so that providers can complete session notes and upload Medicaid documentation contemporaneously.
- ❑ Let's take a look at this process.

# Entering Temporary Children & Enrollments (Continued)

1. Add the “Unmatched Child” first. Once the unmatched child is created, you will be able to create the unmatched enrollment.
  - Go to Caseload Maintenance>Unmatched Children
  - Click **Add Child**

Unmatched Children  

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
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

# Entering Temporary Children & Enrollments (Continued)

- Fill in the as much information as you have; however, you can create the record with as little as the county, child's name and DOB.
- After you click **ADD**, the unmatched child record is created.

The screenshot shows a web form titled "Add Child" with a close button in the top right corner. The form contains the following fields and controls:

- Provider: DEBORAH CHASSEN, SLP (dropdown menu)
- County: WESTCHESTER (dropdown menu)
- District: (dropdown menu)
- Last Name: (text input field)
- First Name: (text input field)
- MI: (checkbox)
- DOB: (text input field)
- Gender: (checkbox)
- Address 1: (text input field)
- Address 2: (text input field)
- City: (text input field)
- State: New York (dropdown menu)
- Zip: (text input field)
- Home Phone: (text input field)
- SEDSTACID: (text input field)
- At the bottom left, there is a button labeled "Add".

Red boxes are drawn around the "Last Name", "First Name", "DOB", and "Add" fields/buttons to highlight them.

# Editing an Unmatched Child

- ❑ The information you entered for the unmatched child may be different than what the county entered. You can edit your unmatched child to match the official record. If the County entered the enrollment incorrectly, contact the county so the enrollment can be edited on their end.
- ❑ Go to **Caseload Maintenance>Unmatched Children**
- ❑ Click **Edit**

Unmatched Children [Add Child](#)

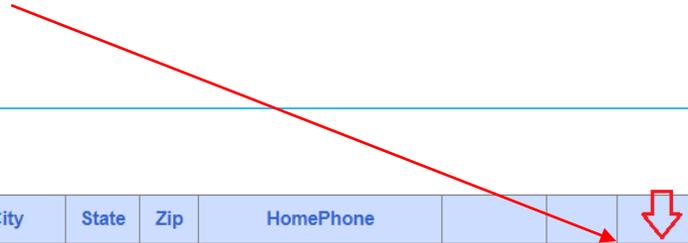
Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone				
C66000159808	HERRARA	KRISTIE		11/10/2015	WESTCHESTER	NEW ROCHELLE	600 PELHAM ROAD	NEW ROCHELLE	NY	10805		Enrollments	Attempt Match	<a href="#">Edit</a>	<a href="#">Delete</a>
C66000152996	MENDEZ	KAMALU		10/19/2016	WESTCHESTER	NEW ROCHELLE	7 DAVENPORT AVE	NEW ROCHELLE	NY	10805	281 844 5019	Enrollments	Attempt Match	<a href="#">Edit</a>	<a href="#">Delete</a>
C66000075197	Pirzinger	Luke		1/18/2014	WESTCHESTER	NEW ROCHELLE			NY			Enrollments	Attempt Match	<a href="#">Edit</a>	<a href="#">Delete</a>
C66000159811	SEBASKI	WYETH		3/11/2016	WESTCHESTER	SCARSDALE	27 FERNCLIFF ROAD	SCARSDALE	NY	10583		Enrollments	Attempt Match	<a href="#">Edit</a>	<a href="#">Delete</a>

# Editing an Unmatched Child

- ❑ After you click Edit, the following screen will allow you to edit the unmatched child. Edit [only] the field(s) that are incorrect and click **Update** at the end of the row.

**Unmatched Children**

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone	Enrollments	Attempt Match	
C660001E	<input type="text"/>	<input type="text"/>		<input type="text" value="11/10/2015"/>		<input type="text" value=""/>			NY		<input type="text"/>			<input type="button" value="Update"/> <input type="button" value="Cancel"/>



# Entering Temporary Children & Enrollments (Continued)

2. Now that the “unmatched child” has been successfully created, you will be able to create the **“unmatched enrollment.”**

- Go to **Caseload Maintenance>Add/Edit Unmatched Enrollment**

- From the drop-down select

- ✓ Session
- ✓ From/To Dates
- ✓ Enrollment Type (RS)
- ✓ RS Type (OT/PT/ST)
- ✓ I/G
- ✓ Units/Minutes (2x30)
- ✓ Timespan (Weekly)
- ✓ 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	

- The unmatched enrollment has now been added.
- You can now use this temporary enrollment to enter your session notes and upload documentation.

# Matching an Unmatched Child

❑ Go to **Caseload Maintenance>Unmatched Children**

❑ Click **Attempt Match**

**Unmatched Children**

Child Number	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	HomePhone	Enrollments	Attempt Match	Edit	Delete
C6600015				11/10/2015					NY			Enrollments	Attempt Match	Edit	Delete
C6600015				10/19/2016					NY			Enrollments	Attempt Match	Edit	Delete
C6600007				1/18/2014					NY			Enrollments	Attempt Match	Edit	Delete
C6600015				3/11/2016					NY			Enrollments	Attempt Match	Edit	Delete

# Matching an Unmatched Child

- ❑ After you click Attempt Match, potential matches will appear on the screen.
- ❑ Click **Select** next to the correct child to match.

**Match Child Against County-Imported Child**

**Current Unmatched Child:**  
MEN County: District: DOB: 10/19/2016

**Potential Matches:**  
Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	MEN	KA		10/19/2016					NY		

**The Current Unmatched Child should match the Potential Match.**

# Matching an Unmatched Child

- After you click Select, the following screen will appear. If both entries match, you will click **Match!**

**Match Child Against County-Imported Child**

**The Current Unmatched Child should match the Potential Match.**

**Current Unmatched Child:**  
MEI County: District: DOB: 10/19/2016

**Potential Matches:**  
Showing children matching the DOB, and with the same first and last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	MEN	KA		10/19/2016					NY		

**Name of Child**

**WARNING:** By clicking the button below, you are combining these two children (including any associated data – not limited to: enrollments, attendances, medicaid consents, medicaid eligibility, IEPs, log notes, scripts/orders). Make sure the match is correct. This cannot be undone.

ME (10/19/2016) → ME (10/19/2016)

**Match!**

**If the name and DOB are the same for both, you can click Match!**

# Matching an Unmatched Enrollment

❑ Go to **Caseload Maintenance > Add Edit Unmatched Enrollments**

❑ Click **Attempt Enrollment Match**

**Unmatched Enrollments**  
School Year:

County	Child Number	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description			
	C66000075			01/18/14	201718	09/05/17	06/22/18	RS	ST	2x30	Attendances	Attempt Child Match	<input type="button" value="Delete"/>
	C66000141			05/08/15	202021	07/06/20	08/14/20	RS	ST	2x30	Attendances		<input type="button" value="Delete"/>
	C66000138			09/06/16	202021	09/08/20	06/25/21	RS	ST	1x30	Attendances	Attempt Enrollment Match	<input type="button" value="Delete"/>
	C66000138			09/06/16	202021	09/08/20	06/25/21	RS	ST	1x30	Attendances	Attempt Enrollment Match	<input type="button" value="Delete"/>

# Matching an Unmatched Enrollment (Continued)

- ❑ After you click **Attempt Enrollment Match**, the following screen will appear.
- ❑ Click **Select** for the correct enrollment.

**Match Enrollment Against County-Imported Enrollment**

Child: **TO** County: District: DOB: **9/6/2016**

**Current Unmatched Enrollment:**  
Session: **2020 - 2021 Winter** From Date: **9/8/2020** To Date: **6/25/2021**  
Enrollment Type: **RS** Service Type: **ST** Individual or Group: **I** Frequency: **1x30**

**Potential Matches:**

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
<input type="button" value="Select"/>	RS	ST	2020 - 2021 Winter	9/8/2020	6/25/2021	I	1x60	RS2021W0184470
<input type="button" value="Select"/>	RS	ST	2020 - 2021 Winter	9/8/2020	6/25/2021	I	1x30	RS2021W0184471

# Matching an Unmatched Enrollment

- ❑ After you click **Select**, the following screen will appear.
- ❑ If the unmatched enrollment criteria (on left – 9/8/20 – 6/25/21 1x30) matches the enrollment criteria (on right 9/8/20 – 6/25/21 1x30), you can click **Match!**.

**Match Enrollment Against County-Imported Enrollment**

Child: **TO** County: District: DOB: 9/6/2016

**Current Unmatched Enrollment:**  
Session: 2020 - 2021 Winter From Date: 9/8/2020 To Date: 6/25/2021  
Enrollment Type: RS Service Type: ST Individual or Group: I Frequency: 1x30

**Potential Matches:**

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2020 - 2021 Winter	9/8/2020	6/25/2021	I	1x60	RS2021W0184470
Select	RS	ST	2020 - 2021 Winter	9/8/2020	6/25/2021	I	1x30	RS2021W0184471

**WARNING:** By clicking the button below, you are combining these two enrollments (including any associated data - not limited to: attendances, orders/scripts, log notes, therapist/provider assignments). Make sure the match is correct. This cannot be undone.

UNMATCHED ENROLLMENT (9/8/2020 - 6/25/2021) 1x30 → RS2021W0184471 (9/8/2020 - 6/25/2021) 1x30

Match!

**Enrollment Criteria under Current Unmatched Enrollment should match what is shown at the bottom of the screen.**

# Medicaid Documentation Requirements / Uploading

- ❑ Providers will be expected to upload IEPs and prescriptions 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 (*IEPs & Prescriptions*).
- ❑ **IMPORTANT:** Dutchess County will be expecting providers to upload Medicaid documentation back to **7/1/20** (Summer Session).
- ❑ Let's take a look at what each upload process looks like.

# How to Upload an IEP

Before an IEP can be uploaded, it must be scanned to your computer (desktop).

**Go to Medicaid>IEP Maintenance**



**1. Type in the Name of the Child>SEARCH>Click SELECT**

A screenshot of a web application interface. At the top left, the text 'IEP Maintenance' is enclosed in a red box. Below it is a search form with a text input field containing '1. Type in Last Name' and a 'Search' button, both highlighted with red boxes. To the right of the search field is a link '[ Show Advanced Search options ]'. Below the search form is a table with columns: Child Number, Last Name, First Name, DOB, CIN, District, and County. The first row of data has 'C6600009' in the 'Child Number' column and '9/22/2014' in the 'DOB' column. A 'Select' button is highlighted with a red box in the first column of the table.

# How to Upload an IEP (Continued)

## 2. Select the School Year

If a student attended the summer session, an IEP must be uploaded that includes the summer services.

## 3. Enter Effective Date

(Start Date of Service)

IEP INFORMATION	
Projected IEP Start Date:	07/06/2020
Projected IEP End Date:	06/25/2021
Projected Date of Annual Review:	06/25/2021
Projected Date for Reevaluation:	01/07/2022
Extended School Year:	Yes

## 4. Choose File

(Browse to where the Rx is saved on your computer)

## 5. Click Upload IEP

### IEP Maintenance

ATKINSON County: District: DOB: Redo Search

**IEPs on File** To upload a new IEP, please first select a school year

School Year  2.

File:  No file chosen Effective Date:

# How to Upload a Prescription

(Two Options)

## Option 1: **Hard Copy Paper Upload Process**

## Option 2: **Digital Speech Recommendation** (for SLPs only)

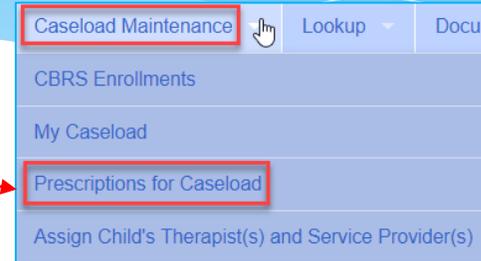
*This process will be addressed in a separate webinar for SLPs.*

# How to Upload a Paper Prescription

❑ Before you can upload a prescription to the Portal you must **scan and save the prescription to your computer** (Desktop).

❑ You can upload a prescription from two different menus in the Portal:

1. **Caseload Maintenance>Prescriptions for Caseload\*** (for Therapists)



2. **Medicaid>Prescriptions>Prescription Entry Maintenance\*** (for Billing Admins)



\* Both options above will bring you to the same entry screen(s) - (Prescription Entry and Prescription Image).

**Important Note Regarding Prescriptions:** Beginning with a **September 1 service date**, providers will not be able to submit a voucher in the Portal until a prescription has been uploaded.

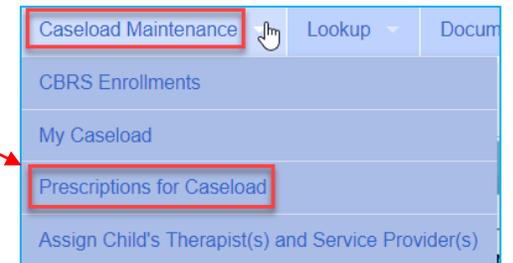
If a prescription is not uploaded, you will receive an error when submitting a voucher, **“Details of Prescription/order not entered for enrollment.”**

# How to Upload a Paper Prescription (Step 1 – Prescription Entry - Therapists)

Before an Rx can be uploaded, it must be scanned to your computer (desktop).

❑ Go to **Caseload Maintenance > Prescriptions for Caseload** (for therapists)

- **Step 1 – Enter Prescription Details**
- Click on **Enter Rx Info** Link



**Prescriptions / Written Orders for Caseload**

Filter By \_\_\_\_\_

Provider:  Session: 2020 - 2021 Winter

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
RS2021WC			9/8/2020	6/23/2021	ST 2x45 Individual	ENTERED	<a href="#">View</a>	<a href="#">View</a>	
RS2021W0			9/8/2020	6/23/2021	ST 3x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>

# How to Upload a Paper Prescription (Prescription Entry - Therapists & Admins)

1. Select Order Type
2. NPI
3. Date Signed
4. Date Range
5. School Year
6. ICD
7. Frequency
8. Select Enrollment
9. Click Preview
10. Click Save & Done

**Manage Prescription Entry**

Managing Order Entry For:   
Image: Attach To Image

Order Type: Speech Therapy  Provider:

Ordering Provider NPI:  Date Signed:

Prescription effective date range

Applies to entire school year   
 Applies to specific school year / session   
 Applies to specific date range

**Make sure you have the correct school year selected.**

2020 - 2021  2020 - 2021 Summer

Reason for Services

ICD   
Search by code or description...

Reason

Frequency

Per IEP  Specific  X  WEEKLY

	ESID	From	To	Frequency	Service Type	I/G
<input checked="" type="checkbox"/>	RS2021W0	9/8/2020	6/23/2021	3x30	Speech Therapy	I

**Make sure you select the enrollment for the Rx.**

**Preview. If everything is correct, click SAVE & DONE**

**Manage Prescription Preview**

Preview

Child:   
Service: Speech Therapy   
Dates Covered: 7/1/2020 - 6/30/2021   
Frequency: Per IEP   
Reason:

ICD Code(s):	ICD Code	Description
	F84.0	Autistic disorder

Ordered By

Name:   
NPI: 1992821   
Date Signed: 8/6/20

# How to Upload a Paper Prescription (Step 2 – Image Entry - Therapists)

- **Step 2 – Upload Prescription Image & Enter Image Details.**
- Click on **Upload Rx Image** Link (From Caseload Maintenance>Prescription for Caseload)

## Prescriptions / Written Orders for Caseload

Filter By

Provider:

Session:

2020 - 2021 Winter

Search

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
RS2021W0			9/8/2020	6/23/2021	ST 2x45 Individual	ENTERED	<a href="#">View</a>	<a href="#">View</a>	
RS2021W0			9/8/2020	6/23/2021	ST 3x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>

# How to Upload a Paper Prescription Image Entry – (Therapists & Admins)

1. **Choose File** and browse to the Rx image on your computer.
2. Fill in the **school year**.
3. Optional – You can type in a description.
4. Fill in your **NPI #**.
5. Fill in the **signature date** of the Rx.
6. Check the **eligible order**.
7. Click **Save**

The screenshot shows a web form titled "Manage Prescription File". It includes a "Managing Order File For:" section with a "Choose File" button. Below this are dropdown menus for "Provider:" and "School Year:" (set to "2020 - 2021"). A text area for "Description" contains the text "You can type a description here. (e.g., Summer Speech Rx.)". The "Ordering Provider Information (optional)" section contains "Ordering Provider NPI:" (173021) and "Date Signed:" (7/1/2020). At the bottom is a table with columns: From, To, Frequency, Service Type, Signed By, and Date Signed. The first row has a checked checkbox, "7/1/2020", "6/30/2021", "PER IEP", "Speech Therapy", and "7/1/2020". "Save" and "Cancel" buttons are at the bottom.

	From	To	Frequency	Service Type	Signed By	Date Signed
<input checked="" type="checkbox"/>	7/1/2020	6/30/2021	PER IEP	Speech Therapy		7/1/2020

# How do you know if you completed your Rx? (For Therapists)

❑ How do you know if you successfully completed your prescription?

The **Rx Status Column** on the Prescriptions for Caseload screen will let you know whether the prescription has been **Entered, Verified, Missing\* or Invalidated**. If Invalidated, you will see the reason why it has been invalidated.

*\* If the prescription was not entered correctly, the status will show as “missing.”*

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	ENTERED	View	View	
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	INVALIDATED: Computer-generated signature stamp used.	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

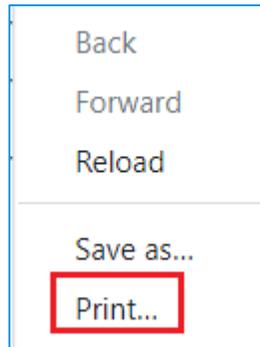
The link will also change to “**View**” when the Rx has been successfully uploaded.

# How to print the prescription from Prescriptions for Caseload - (Therapists)

- ❑ Click the “**View**” link in either the **Rx Entry** or **Rx Image** column.

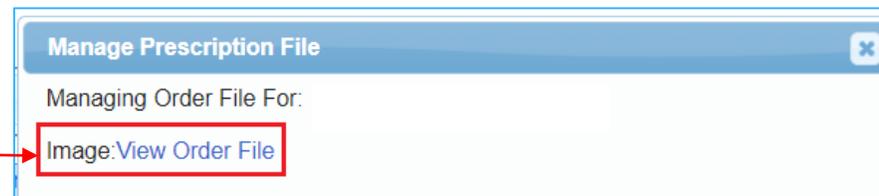
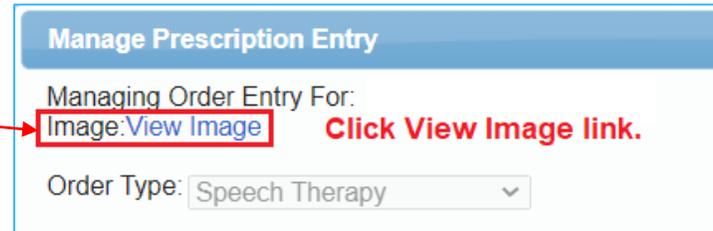
ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
RS2021W0			9/8/2020	6/23/2021	ST 2x45 Individual	ENTERED	<a href="#">View</a>	<a href="#">View</a>	
RS2021W0			9/8/2020	6/23/2021	ST 3x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>

- ❑ From the **Rx Entry** column, click “**View.**”
- ❑ Click the “**View Image**” link.
- ❑ Right Click>**Print**



**\*\* OR \*\***

- ❑ From the **Rx Image** column, click “**View.**”
- ❑ Click the “**View Order File**” link.
- ❑ Right Click>**Print**



# How to Upload a Paper Prescription (Step 1 - Prescription Entry - Admins)

Before an Rx can be uploaded, it must be scanned to your computer (desktop).

❑ Go to **Medicaid>Prescriptions>Prescription Entry Maintenance**

- Type in the child's **Last Name** into the Search Box>**SEARCH**
- Click **SELECT**

Name (Last,First)   [ Show Advanced Search options ]

	Child Number	Last Name	First Name	DOB	CIN	District	County	Match Status	
<input type="button" value="Select"/>	C660001							County Record	Details



- **Step 1 – Enter Prescription Details**
- Click on **ENTER PRESCRIPTION ENTRY**

Home | File Transfer | Activities | eSTACs | Attendance | Billing

County: | District: | DOB: |

Prescription Entries | Prescription Images

# How to Upload a Paper Prescription (Prescription Entry - Therapists & Admins)

1. Select Order Type
2. NPI
3. Date Signed
4. Date Range
5. School Year
6. ICD
7. Frequency
8. Select Enrollment
9. Click Preview
10. Click Save & Done

**Manage Prescription Entry**

Managing Order Entry For:   
Image: Attach To Image

Order Type: Speech Therapy Provider:

Ordering Provider NPI:  Date Signed:

Prescription effective date range

Applies to entire school year   
 Applies to specific school year / session   
 Applies to specific date range

**Make sure you have the correct school year selected.** 2020 - 2021 2020 - 2021 Summer

Reason for Services

ICD   
Search by code or description...

Reason

Frequency

Per IEP  Specific  X  WEEKLY

	ESID	From	To	Frequency	Service Type	I/G
<input checked="" type="checkbox"/>	RS2021W0	9/8/2020	6/23/2021	3x30	Speech Therapy	I

**Make sure you select the enrollment for the Rx.**

Preview **Preview. If everything is correct, click SAVE & DONE** Cancel

**Manage Prescription Preview**

Preview

Child:

Service: Speech Therapy

Dates Covered: 7/1/2020 - 6/30/2021

Frequency: Per IEP

Reason:

ICD Code(s):	ICD Code	Description
	F84.0	Autistic disorder

Ordered By

Name:

NPI: 1992821

Date Signed: 8/6/20

Save & Done Cancel

# How to Upload a Paper Prescription (For Admins - Continued)

- **Step 2 – Upload Prescription Image & Enter Image Details**
- Click on **UPLOAD PRESCRIPTION IMAGE**



The screenshot displays a web application interface with a navigation menu at the top containing 'Home', 'File Transfer', 'Activities', 'eSTACs', 'Attendance', 'Billing', and 'Ca'. Below the menu, there are input fields for 'County:', 'District:', and 'DOB:'. A red arrow points from the text 'Click on UPLOAD PRESCRIPTION IMAGE' to a button labeled 'Upload Prescription Image', which is highlighted with a red rectangular box. To the left of this button is another button labeled 'Enter Prescription Entry'. At the bottom of the interface, there are two tabs: 'Prescription Entries' and 'Prescription Images'.

# How to Upload a Paper Prescription Image Entry – (Therapists & Admins)

1. **Choose File** and browse to the Rx image on your computer.
2. Fill in the **school year**.
3. Optional – You can type in a description.
4. Fill in your **NPI #**.
5. Fill in the **signature date** of the Rx.
6. Check the **eligible order**.
7. Click **Save**

The screenshot shows a web form titled "Manage Prescription File". The form includes a "Managing Order File For:" section with a "Choose File" button. Below this are dropdown menus for "Provider:" and "School Year:" (set to "2020 - 2021"). A text area for "Description" contains the text "You can type a description here. (e.g., Summer Speech Rx.)". The "Ordering Provider Information (optional)" section contains "Ordering Provider NPI:" (173021) and "Date Signed:" (7/1/2020). A table at the bottom has columns for "From", "To", "Frequency", "Service Type", "Signed By", and "Date Signed". The first row is checked, with values: From: 7/1/2020, To: 6/30/2021, Frequency: PER IEP, Service Type: Speech Therapy, Date Signed: 7/1/2020. At the bottom are "Save" and "Cancel" buttons.

	From	To	Frequency	Service Type	Signed By	Date Signed
<input checked="" type="checkbox"/>	7/1/2020	6/30/2021	PER IEP	Speech Therapy		7/1/2020

# How do you know if you completed your Rx? (For Admins – Prescription Entry Maintenance)

❑ How do you know if you successfully completed your prescription?

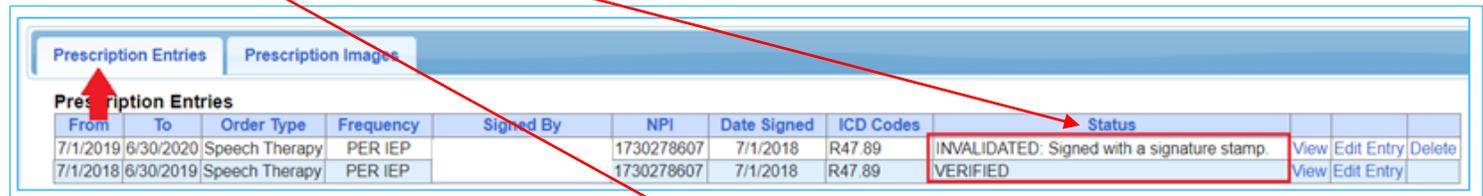
■ There are two tabs on the **Prescription Entry Maintenance Screen**

- 1) Prescription **Entries**, and
- 2) Prescription **Images**



Each tab has a “**Status**” column

■ The Prescription Entries Tab will show you whether the prescription was **Entered, Verified, Invalidated** or **Missing**.



A screenshot of the Prescription Entries Tab showing a table with columns for From, To, Order Type, Frequency, Signed By, NPI, Date Signed, ICD Codes, and Status. Red arrows point from the text above to the "Status" column and the "INVALIDATED" and "VERIFIED" rows.

From	To	Order Type	Frequency	Signed By	NPI	Date Signed	ICD Codes	Status			
7/1/2019	6/30/2020	Speech Therapy	PER IEP		1730278607	7/1/2018	R47.89	INVALIDATED: Signed with a signature stamp.	View	Edit Entry	Delete
7/1/2018	6/30/2019	Speech Therapy	PER IEP		1730278607	7/1/2018	R47.89	VERIFIED	View	Edit Entry	Delete

■ The Prescription Images Tab will show you whether the image is “**Attached**” or “**Unattached**” to the Prescription Image.



A screenshot of the Prescription Images Tab showing a table with columns for School Year, Description, Signed By, Date Signed, Date Uploaded, and Image Status. Red arrows point from the text above to the "Image Status" column and the "ATTACHED TO ORDER" and "UNATTACHED TO ORDER" rows.

School Year	Description	Signed By	Date Signed	Date Uploaded	Image Status			
201920	speech		7/1/2018	7/11/2019	ATTACHED TO ORDER	View	Edit Image	Delete
201819	Order File created from CPSE Portal		7/1/2018	12/5/2018	UNATTACHED TO ORDER	View	Edit Image	Delete

# How to print the prescription from Prescription Entry Maintenance

Go to **Medicaid>Prescriptions>Prescription Entry Maintenance**

- Type in the **name of the child**>Click **SEARCH**

	Child Number	Last Name	First Name	DOB	SED STAC ID	CIN	District	County	MatchStatus	
Select	C6600006			6/8/2014					County Record	Details
Select	C6600012			6/8/2014					County Record	Details

- Click **Select** for the correct child. After you click **Select**, the following screen comes up. You can print from either the **Prescription Entries Tab** or the **Prescription Images Tab** by clicking **View**.

From	To	Order Type	Frequency	Signed By	NPI	Date Signed	ICD Codes	Status	
7/1/2018	6/30/2019	Speech Therapy	PER IEP	CRISTINA CIAMEI	1003069931	9/5/2018	F80.0,F80.2	VERIFIED	View Edit Entry

- Click **View** from either Tab.
- When the image comes up, **Right Click** on the Rx image and **print**.

- Back
- Forward
- Reload
- Save as...
- Print...**

School Year	Description	Signed By	Date Signed	Date Uploaded	Image Status	
201819				12/12/2018	ATTACHED TO VERIFIED ORDER	View Edit Image

# TROUBLESHOOTING

## (Prescription Uploading – Troubleshooting Summary)

- ❑ In summary the following issues will cause your prescription to show as missing:
  - ✓ Prescription Entry Details were not completed and/or saved (Preview/Save & Done).
  - ✓ The enrollment that applies to the Rx was not selected on the **Prescription Entry** Details Screen.
  - ✓ Prescription Image was not uploaded or was uploaded and not attached to the Prescription Details Screen.
  - ✓ The Eligible Orders on the **Image** Details Screen was not selected.
  - ✓ The correct school year was not selected so the correct ESID # is not associated with the prescription.
  - ✓ The prescription was invalidated because one of the eight mandated criteria did not meet Medicaid requirements. As a result, billing cannot move forward.
  - ✓ All the items noted above will result in the following error message,  
**“Details of Prescription/order not entered for enrollment.”**

# TROUBLESHOOTING (Prescription Uploading)

- ❑ If the **Prescription Entry** and/or the **Image Entry** is not completed in its entirety, your prescription will show as “missing.” As a result, when you try to submit your voucher, you will receive the following error: **“Details of Prescription/Order not entered for enrollment.”**
- ❑ Listed below are some things to check to ensure everything is entered correctly for each screen:
- ❑ The **Prescription Entry Details** were not completed; or they were completed, but **Preview/Save & Done** was not clicked to save the entry.

The image shows two screenshots from a software interface. The left screenshot is the 'Prescription Entry Details' screen, featuring a table with columns: ESID, From, To, Frequency, Service Type, and I/G. A red box highlights the first row, which has a checked checkbox in the ESID column. Below the table is a 'Preview' button, also highlighted with a red box. A red arrow points from the 'Preview' button to the 'Save & Done' button on the right screenshot. The right screenshot is the 'Ordered By' screen, showing fields for Name, NPI, and Date Signed. The 'Save & Done' button at the bottom is highlighted with a red box. A red arrow points from the 'Save & Done' button back to the 'Preview' button on the left screenshot. A red text box on the left screenshot says 'Make sure you select the enrollment for the Rx.' and another red text box below the table says 'Preview. If everything is correct, click SAVE & DONE'.

ESID	From	To	Frequency	Service Type	I/G
<input checked="" type="checkbox"/> RS2021W0	9/8/2020	6/23/2021	3x30	Speech Therapy I	

Make sure you select the enrollment for the Rx.

Preview. If everything is correct, click SAVE & DONE

Ordered By

Name:

NPI: 1992821

Date Signed: 8/6/20

Save & Done Cancel

- ❑ The **enrollment(s)** that the prescription covers was not selected on the Prescription Entry Screen.

# TROUBLESHOOTING

## (Prescription Uploading - Continued)

- ❑ The **Eligible Orders** on the **Image Entry** Screen was not checked for the Rx image.

	From	To	Frequency	Service Type	Signed By	Date Signed
<input checked="" type="checkbox"/>	7/1/2020	6/30/2021	PER IEP	Speech Therapy		7/1/2020

- ❑ The prescription was **invalidated** because it did not meet Medicaid requirements. A new prescription should be uploaded as soon as possible or billing will be halted.

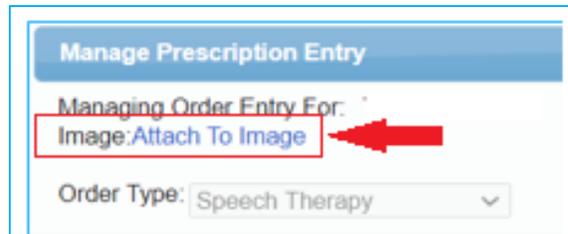
ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	ENTERED	View	View	
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	INVALIDATED: Computer-generated signature stamp used.	Enter Rx Info	Upload Rx Image	Create Speech Recommendation
CBRS2021SC			7/6/2020	8/14/2020	ST 3x30 Individual	MISSING	Enter Rx Info	Upload Rx Image	Create Speech Recommendation

- ❑ An Invalidated Rx changes the Rx status from “Entered” to “Missing.” Billing cannot proceed until another prescription has been uploaded.

# TROUBLESHOOTING

## (Prescription Uploading - Continued)

- ❑ The **Rx Image** was either not uploaded or it was uploaded and not attached to the Prescription Entry Details. If the image was uploaded, but not attached, you can click the “**Attach To Image**” link on the Prescription Entry screen (top of screen) and select from the available uploaded images.



Otherwise, the **Rx image** needs to be uploaded and then attached from the Prescription Entry Details Screen.

- ❑ You are sure that you uploaded the prescription, but the ESID # is still appearing on the Missing Scripts Report. Why?  
When the prescription was entered, you may not have selected the correct school year. As a result, the prescription was uploaded to the incorrect school year. The Portal will default to the current school year. If you are trying to upload a prescription for the previous or upcoming school year, make sure you change the school year when completing the prescription entry and image screens.

# When can an SLP prepare their prescription?

The Medicaid Provider & Billing Handbook (Update 9) states that prescriptions must be prospective (**prior to the initiation of service/evaluation**). However, the Medicaid Q&A states that an SLP who has **not** seen the student cannot write a referral.

## Medicaid Questions & Answers

### **Question #94.**

*Can a NYS licensed and currently registered speech-language pathologist (SLP) who has not seen the student write a referral for speech therapy?*

### **Answer: No.**

***The SLP cannot write a referral if they have not seen the student.*** 18NYCRR 505.11 states that a written order must contain a diagnostic statement and purpose of treatment. It is not acceptable under the Medicaid program for the ordering or referring professional never to have met with the child as it is incompatible with the obligations of the ordering practitioner to assure that the ordered care, services, or supplies will meet the recipient's needs and restore him or her to the best possible functional level. [December 13, 2010]

# When can an SLP prepare their prescription? (Continued)

McGuinness has recently received direction from SED regarding this specific issue.

SLPs can write a Speech recommendation “**directly following**” the initial session with the child under the following circumstances:\*

- ❑ *The SLP uses the results of the initial evaluation (which should be delineated in the IEP)*
- ❑ *The SLP can be assured that the ordered services will meet the child’s needs*
- ❑ *The SLP can be assured that the child’s level of function can be increased to the best possible outcome*
- ❑ *If the above criteria can be met, the recommendation can be written on the same day “**after**” the initial session and the session will be Medicaid-eligible. If the prescription is not written on the same day that services began, any provided sessions that took place prior to the date of the prescription must be marked as “**Not Medicaid-Eligible**” on the session note.*
- ❑ *The date of the Speech recommendation must be the **same date as the initial session** with the child.*

(\* This has been confirmed with SED.)

# Reports

## (Outstanding Documentation Reports)

☐ Listed below are some reports that may assist you with your Medicaid responsibilities:

- **Outstanding Documentation Reports**

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

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

# Is there a way to determine if I have completed a prescription for all children on my caseload?

☐ There are three ways to run a report to check the status of what has been entered and/or missing.

**1. Medicaid>Missing Documents>Missing Scripts**

This report will show what is missing or verified for all children.

**2. Caseload Maintenance>Prescriptions for Caseload (Therapists)**

This report will show the status for each child on your caseload. (*Missing, Verified, Entered, Invalidated/Reason*)

**3. Medicaid>Prescriptions>Prescription Entry Maintenance**

Click the **SEARCH** button and a list of all children will populate. You can check an individual child's status by clicking the "Select" link at the beginning of the row. The "**STATUS**" column will reveal the status of the script.

# Missing Prescriptions Report

## Medicaid>Missing Documents>Missing Scripts

### Missing Scripts

Filters

Provider  Session  County    
 Show Missing Scripts  Show Not Verified Scripts  Show Verified Scripts

Filter Options →

Status	LastName	FirstName	DOB	ESID	From Date	To Date	Service	I/G	Frequency	County	District
MISSING			11/10/15		03/04/19	06/26/19	OT	I	2x30	NASSAU	GREAT NECK UFSD
MISSING			04/27/14		09/05/18	06/26/19	ST	I	3x30	NASSAU	ROCKVILLE CENTRE UFSD
MISSING			12/27/13		01/28/19	06/26/19	ST	I	1x30	NASSAU	HICKSVILLE UFSD
MISSING			12/27/13		01/28/19	06/26/19	ST	G	1x30	NASSAU	HICKSVILLE UFSD
MISSING			01/09/15		12/03/18	06/26/19	OT	I	2x30	NASSAU	HERRICKS UFSD
MISSING			05/28/15		09/05/18	06/26/19	OT	I	1x30	NASSAU	HICKSVILLE UFSD
MISSING			12/01/14		11/05/18	06/26/19	OT	I	2x30	NASSAU	GARDEN CITY UFSD
MISSING			12/01/14		03/18/19	06/26/19	ST	I	1x30	NASSAU	GARDEN CITY UFSD
MISSING			12/01/14		03/18/19	06/26/19	ST	I	2x30	NASSAU	GARDEN CITY UFSD
MISSING			12/01/14		03/18/19	06/26/19	CSL	I	1x30	NASSAU	GARDEN CITY UFSD
MISSING			11/06/14		02/11/19	06/26/19	OT	I	2x30	NASSAU	FRANKLIN SQUARE UFSD
MISSING			03/01/15		03/14/19	06/26/19	ST	I	3x30	NASSAU	WEST HEMPSTEAD UFSD
MISSING			06/16/15		02/11/19	06/26/19	ST	I	1x30	NASSAU	GARDEN CITY UFSD
MISSING			06/16/15		03/11/19	06/26/19	ST	I	3x30	NASSAU	GARDEN CITY UFSD
MISSING			06/16/15		03/11/19	06/26/19	ST	I	1x30	NASSAU	GARDEN CITY UFSD
MISSING			06/25/15		01/23/19	06/26/19	ST	I	3x30	NASSAU	UNIONDALE UFSD
MISSING			06/20/15		03/18/19	06/26/19	OT	I	3x30	NASSAU	ELMONT UFSD
MISSING			11/12/14		03/29/19	06/26/19	OT	I	1x30	NASSAU	MANHASSET UFSD
MISSING			11/12/14		03/29/19	06/26/19	OT	I	1x30	NASSAU	MANHASSET UFSD
MISSING			01/20/15		01/14/19	06/26/19	PT	I	2x30	NASSAU	ELMONT UFSD

# Prescription Status Report for Caseload

## Caseload Maintenance > Prescriptions for Caseload

### Prescriptions / Written Orders for Caseload

Filter By

Provider:

Session: 2018 - 2019 Winter

ESID	Last Name	First Name	From Date	To Date	Description	Rx Status	Rx Entry	Rx Image	
			1/2/2019	6/26/2019	ST 2x30 Individual	VERIFIED	<a href="#">View</a>	<a href="#">View</a>	
			1/14/2019	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			9/5/2018	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			9/5/2018	11/12/2018	ST 4x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			11/13/2018	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			11/13/2018	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			9/5/2018	6/26/2019	ST 3x30 Individual	VERIFIED	<a href="#">View</a>	<a href="#">View</a>	
			10/22/2018	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			9/5/2018	6/26/2019	ST 4x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			9/5/2018	6/26/2019	ST 4x30 Individual	VERIFIED	<a href="#">View</a>	<a href="#">View</a>	
			9/5/2018	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			4/15/2019	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			9/5/2018	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			2/11/2019	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			9/5/2018	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>
			3/21/2019	6/26/2019	ST 2x30 Individual	MISSING	<a href="#">Enter Rx Info</a>	<a href="#">Upload Rx Image</a>	<a href="#">Create Speech Recommendation</a>

# Missing IEPs Report

## Medicaid>IEP Documents>Missing IEPs

- ❑ Go to **Medicaid>IEP Documents>Missing IEPs**
- ❑ Select the **School Year Session** from the drop-down
- ❑ **Retrieve**
- ❑ Missing IEPs Report will show you a list of all outstanding IEPs.

County:  Provider:  School Year Session:

Missing IEPs

Last Name	First Name	DOB	ESID	From Date	To Date	Service Type	I/G	Frequency	County	District
		05/22/16		07/06/20	08/14/20	ST	I	2x30		
		04/06/15		07/06/20	08/14/20	ST	I	3x30		
		05/27/15		07/06/20	08/14/20	ST	I	1x30		

# Missing Documents Preventing Claiming Report

Medicaid>Missing Documents>Missing Documents Preventing Claiming

- ❑ Go to **Medicaid>Missing Documents>Missing Documents Preventing Claiming**
- ❑ Enter the **“Oldest Date.”** (The first date that you would like to determine missing documentation. (e.g., To run a report for the summer session, the oldest date would be 7/1/20.)
- ❑ Click **SEARCH.**

**Missing Documents Preventing Claiming**

County  Provider  District  Oldest Date:

Provider	District	Child	DOB	Session	ESID	Service	From Date	To Date	Need IEP	Need Consent	Need Script
			03/31/15	202021 SUM	RS2021SI	ST	07/06/20	08/14/20	YES		

If documentation is missing, "YES" will appear in the column for IEP, Consent or Script.

- ❑ This report can be exported to Excel where filtering can be applied.

# McGuinness Medicaid-in-Education Contact Information

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- ❑ **Lisa Mell**, McGuinness Consultant – [lmell@jmcguinness.com](mailto:lmell@jmcguinness.com) – Extension #34

# Medicaid References

- ❑ Medicaid Provider Policy & Billing Handbook (Update 9)

<http://www.oms.nysed.gov/medicaid/handbook/>

- ❑ Questions & Answers

[http://www.oms.nysed.gov/medicaid/q\\_and\\_a/q\\_and\\_a\\_combined\\_revised\\_12\\_9\\_16.pdf](http://www.oms.nysed.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf)

# Follow-up

- ❑ This presentation will be recorded and the PowerPoint presentation will be uploaded to the Portal Knowledge Base for future reference.
  - Search for help in our Knowledge Base: <http://support.cpseportal.com/Main/Default.aspx>
  - Email: [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
  - Questions/Guidance regarding Medicaid compliance: **Contact Deborah Frank**  
[dfrank@jmcguinness.com](mailto:dfrank@jmcguinness.com), 518-393-3635, Ext. #41

## ❑ HELPFUL LINKS

CPSE Portal Knowledge Base Links for Medicaid

<http://support.cpseportal.com/kb/a231/medicaid-knowledge-base-links.aspx>