

SERVICE LOCATIONS & CENTER-BASED PROVIDER SITES
Quick Reference Guide to Medicaid-Compliant Session Note Entries
(For Portal, CLAIMS & CLAIMS Online Users)

What do you enter into the Setting Field on the Session Note?

The list shown below are appropriate Medicaid-compliant “Settings” that could be used in the Setting Field.

- Home
- Daycare
- Preschool
- Nursery School
- Universal Pre-K
- Medical Site
- Community Setting
- Facility Location/Private Office
- Therapy Room
- Teletherapy

In addition, you may see “Settings” delineated on the IEP in **the Summary-Special Education Programs and Related Services** Section. Please see the highlighted information on the screenshot below. These designations are also acceptable to use in the Setting Field.

SUMMARY-SPECIAL EDUCATION PROGRAMS AND RELATED SERVICES			
Special Education Itinerant Services: 1:1 : Direct	01/06/2025 - 06/27/2025	5 x Weekly, 1hr.	Home
Special Class in an Integrated Setting: 12:1+2	01/06/2025 - 06/27/2025	5 x Weekly, 5hr.	Special School
Speech/Language Therapy: Individual	11/27/2024 - 06/27/2025	2 x Weekly, 45min.	Home
Occupational Therapy: Individual	01/06/2025 - 06/27/2025	2 x Weekly, 30min.	Facility Location/Private Office

What do you enter into the Location Field on the Session Note?

The Location Field should show an entry that supports “where” the service was rendered.

For example:

Setting: *Preschool*

Location: *Montessori Preschool, 123 Main St., Albany, NY*

Setting: *Montessori Preschool*

Location: *123 Main Street, Albany, NY*

Since there are many Montessori Schools with the same name, the Location Field should support the exact location the service was rendered.

Examples of Settings/Locations that are Medicaid compliant and some that are not Medicaid compliant

Not Specific Enough <i>(Does not meet Medicaid Requirements)</i>	Specific Enough <i>(Meets Medicaid Requirements)</i>
Setting: School Location: Therapy Room	Setting: Preschool Location: ABC Preschool, 123 Main St., Albany, NY
Setting: Universal Pre-K Location: Preschool	Setting: Universal Pre-K Location: ABC Preschool, Classroom 3
Setting: Preschool Location: Sensory Gym	Setting: Preschool Location: ABC Preschool, Sensory Gym
Setting: Community Setting Location: Classroom A	Setting: Community Setting Location: Classroom A, 254 South Main Street, Albany NY,

Caseload Defaults: The Portal has the ability to create “*Caseload Defaults*” on Session Notes for the following fields:

- 1) **Setting**
- 2) **Location**
- 3) CPT Code(s)
- 4) ICD Code(s)

Once the “*Defaults*” have been set-up, the default settings will autofill into each subsequent session note. If the session note default does not apply to a particular session the “*Default*” setting can be deleted and changed for that specific session (without deleting the Default setting). **Setting up “*Defaults*” is highly recommended.**

This Link (<https://support.cpseportal.com/kb/a243/setting-up-defaults-in-your-caseload.aspx>) will bring you to the Knowledge Base Article that shows how to set up *Session Note Defaults* for your caseload.

Screen where Caseload Defaults are Entered:

Enrollment Defaults
Enrollment Info

Child Name: [REDACTED] Electronic Service ID: RS2425W002 Enrollment Type: RS RS Type: ST1
County: [REDACTED] Provider: [REDACTED] District: [REDACTED]
Service Nickname: [REDACTED]
Enrollment Notes: [REDACTED]

For each new attendance use these default values
Bill each entry as: 1 30 minute session(s) for a total duration of 30 minutes.

Service Setting: [REDACTED] Location: [REDACTED]

Default CPT Code for new attendance

CPT Code	Description	Units	
[REDACTED]	[REDACTED]	[REDACTED]	Add

Default ICD10 Code for new attendance

ICD 10 Code	Description	
[REDACTED]	[REDACTED]	Add

Screen where Caseload Defaults Auto Fill

Edit - GRP BLAND (Feb 6, 2023)

Time In: 09:00 [AM] 5) Time Out: 09:30 [AM]

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

Co-Visit with Supervisor

Number of Children in Group This Session: 2 3)

[BLAND, DUSTIN] 1)

[Child 2]
[Child 3]
[Child 4]
[Child 5]

Enrollment: 3) [BLAND, DUSTIN 1x30 - ST1 - G 09/07/22 - 06/22/23 Preschool]

ESID: CBRS2223W0022645 Nickname: [REDACTED]

2) Service Type: ST1 Frequency: 1 x 30

Entry Type: [Provided Treatment Session]

Diagnosis Code(s): 10) F80.2

CPT Codes: [lookup] Units: 9) 92508 TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/OR AUDITORY PROCESSING DISORDER: GROUP 2 OR MORE INDIVIDUALS 1

Setting: 4) Montessori Preschool
Location: 123 Main Street, Schenectady, NY

In order to ensure that the **Setting and Location** entries on the Session Note are being entered in accordance with Medicaid guidelines, McGuinness will be reviewing the Setting & Location Fields on all Session Notes (for Full-Service Medicaid Counties).

After McGuinness has reviewed all of the service locations and CB provider sites for all FSM counties, your county will be enabling an edit that requires every service location to be “approved” by McGuinness before billing can be submitted to the county. Providers will receive a one-month notification prior to enabling the edit.

The screenshot shown below will give you an idea of what McGuinness will see on the Approval Screen. (Providers do not have access to this screen.)

Select	Provider	EnrollmentType	Setting	Location
<input type="checkbox"/>	ABC	RS	Community Setting	Community Center
<input type="checkbox"/>	ABC	RS	Daycare	Butterfly Kisses Daycare

This screen above will be filtered for **County and Provider for RS and/or CBRS** Locations. As you can see each Setting and Location used by each agency will populate to this screen.

If you cannot submit billing due to a Service Location error, please submit an email to Medicaid@cpseportal.com and someone from the Medicaid Team will assist you with your issue.

Supporting Medicaid Guidance

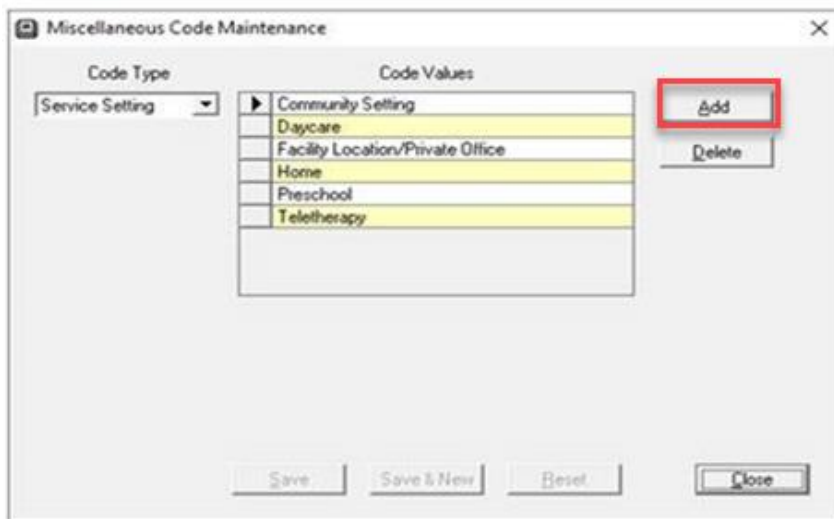
164. Q. Are session notes that indicate the therapy setting as “Erie 1 BOCES” acceptable for Medicaid billing purposes?

A. The school, clinic, or other setting where services are delivered should be sufficiently clear that the specific location can be discerned. If there is only one address associated with the name “Erie 1 BOCES” it is sufficient. If there is more than one location associated with that same name, then the setting must be uniquely identified in the session note (e.g., the physical address could be recorded). If, upon review of session notes, the school district, county, or §4201 school finds insufficient documentation of the ‘setting’ in which the service was delivered, the school district, county, or §4201 school may have other supporting documentation of where the service was actually furnished that could be used to support a Medicaid claim. Such other documentation may be an attendance log that can be cross-referenced with the session notes to satisfy the documentation requirements. Documentation that is “before the fact” and shows what is intended to occur (e.g., schedules, IEPs) does not provide evidence of what actually happened and is not sufficient. The documentation must demonstrate what actually occurred (e.g., a session note or a transportation log). [December 5, 2011]

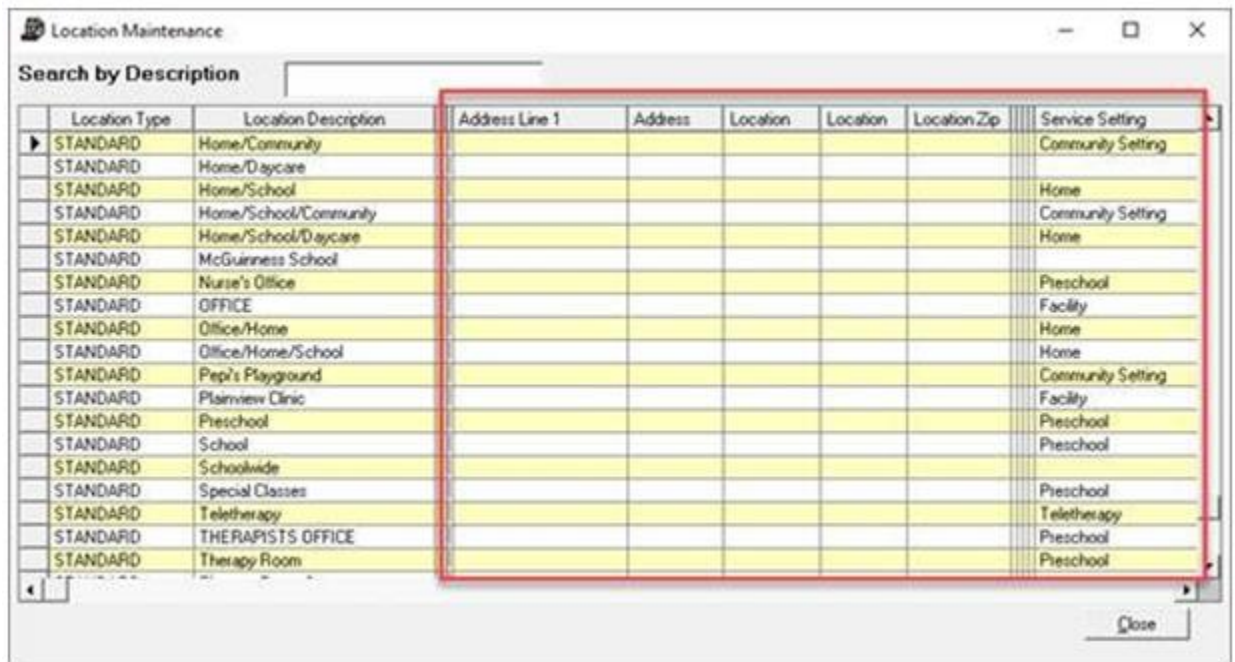
CLAIMS/EnterClaims Users:

CLAIMS/EnterClaims users should ensure that the **Service Setting and Location Maintenance Screens** are completed in accordance with the guidance shown above. Please see screenshots below.

- **Service Setting:** Maintenance>Misc. Maintenance>Miscellaneous Codes>Service Setting



- **Location:** Maintenance>Misc. Maintenance>Miscellaneous Codes>Location



CLAIMS Online Users:

CLAIMS Online users should ensure that the specific locations are entered into the Location Maintenance by going to: **Maintenance>Locations**

Please make sure that the **Location and Alternate Location** on the *Enrollment* is completed with the correct information. Please see screenshot on the next page.

Location Maintenance – CLAIMS Online

Make sure the following fields are filled in.

- Description
- Address
- City
- State
- Zip
- Service Setting

The screenshot shows a web form titled "Add Location". The form has the following fields and values:

- *Type:** Standard
- Description:** ABC Daycare
- Office:** -- Select --
- Area:** -- Select --
- Is Private?:**
- Address 1:** 123 Main Street
- Address 2:** Address
- City:** Latham
- State:** New York
- Zip:** 12110
- Phone:** Phone Number
- Fax:** Fax Number
- Contact First Name:** Contact First Name
- Contact Last Name:** Contact Last Name
- Service Setting:** Daycare
- Billing NPI:** Billing NPI
- Opening Time:** [Time Picker]
- Closing Time:** [Time Picker]

Buttons for "Submit" and "Cancel" are located at the bottom right of the form.

CLAIMS and CLAIMS Online users should contact their Client Relationship Manager for assistance in setting up the Service Setting and Location Maintenance.