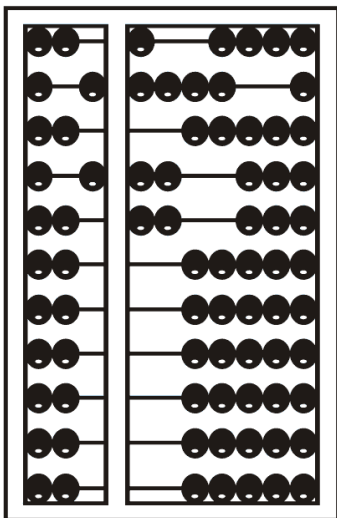


JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants



# CPSE Portal Session Notes





# Classroom Attendance




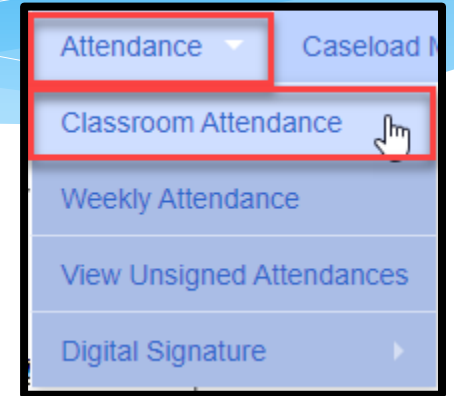
# Classroom Attendance – For Teachers, Aides or Office Billing Admins

- \* For children in a Center Based classroom program, their presence is recorded as present or absence.
  - \* There is no distinction between why they were not present.
  - \* No additional information is entered (times, activities, progress, etc.).
  - \* Your agency can create a school schedule that will grey out the days when school is closed.
- \* However, the child's services (Center Based Related Services) (OT, PT, etc.) are recorded with detailed entries.



# Entering Classroom Attendance

- \* Go To **Attendance -> Classroom Attendance**
- \* Click on “Attendance” to the right of the classroom.
- \* If you do not have access to the Classroom, then the agency has not assigned you to the classroom as a teacher or aide.



Filter Classrooms

Session: 2019 - 2020 Winter Program: Active During (Select Month & Year):


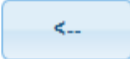
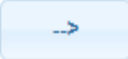
Apply Filter

Attendance	Class	Description	School Year	Program	# Students	# Teachers	# Aides		
Attendance	AQ - 1 AM (29:0:0)	AQ - 1 AM	2019 - 2020 Winter	9100	8	1	0	Edit Classroom	Assign Children
Attendance	AQ - 2 (97:0:0)	AQ - 2	2019 - 2020 Winter	9160	7	1	0	Edit Classroom	Assign Children
Attendance	AQ - 3 AM (82:0:0)	AQ - 3 AM	2019 - 2020 Winter	9165	8	2	0	Edit Classroom	Assign Children



# Entering Classroom Attendance

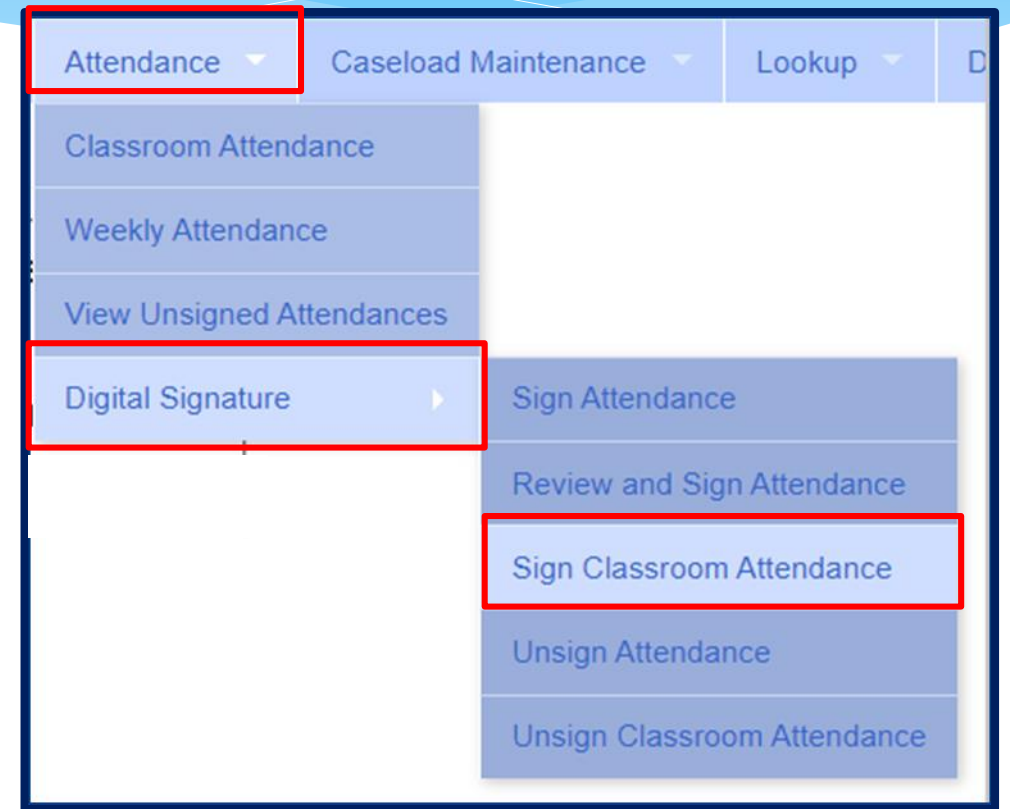
- \* If a child is present single click on the day and it will be highlighted in green. Green indicates child was present for that day.
- \* If the child was absent double click on the day and it will change to the color Red. Red indicates the child was absent for that day.
- \* If school was closed, the date of the closure will be greyed out.

Current Week 											
				03/06/22		-		03/12/22			
Enrollment		Mon <input checked="" type="checkbox"/>		Tue <input checked="" type="checkbox"/>		Wed <input checked="" type="checkbox"/>		Thu <input checked="" type="checkbox"/>		Fri <input checked="" type="checkbox"/>	
		03/07/22		03/08/22		03/09/22		03/10/22		03/11/22	
1/03/22-6/24/22	(CB2122W0009637)	signed		signed		signed		signed		signed	
9/02/21-6/24/22	(CB2122W0009481)	signed		signed		signed		signed		signed	
9/20/21-6/24/22	(CB2122W0009461)	signed		signed		signed		signed		signed	
9/02/21-6/24/22	(CB2122W0009629)	signed		signed		signed		signed		signed	
										Total Sessions: 20	



# Signing Classroom Attendance

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





# Signing Classroom Attendance

- \* This screen shows the attendance you need to review/edit/sign for.
- \* You can filter by a classroom, month, the county and provider.
- \* Once you have selected your filter, hit “Retrieve”.

A screenshot of a web application interface for signing classroom attendance. It features four dropdown menus for filtering: Classroom, Month, County, and Provider. The County dropdown is currently set to 'ROCKLAND'. To the right of the filters are two buttons: 'Retrieve' and 'Sign Attendance'. The 'Retrieve' button is highlighted with a red rectangular border.

Classroom:  Month:  County:  Provider:



# Signing Classroom Attendance

- \* Teachers can delete attendances but cannot add them on this screen before your sign your

- \* Teachers can delete attendances but cannot add them on this screen before you sign your attendances.
- \* First, select the attendances you wish to sign for by clicking the box next to each name.
- \* Once you have reviewed/edited your attendance, click on “Sign Attendance”.
- \* Read the agreement, enter your pin and click “I agree.”

[illegible]





# **Attendance Entry / Record**



# Attendance Entry/Record

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

- \* Child
- \* Service Type
- \* Individual vs. Group
- \* Date of Service
- \* Time In/Time Out
- \* Co-Visit with Supervisor
- \* Setting
- \* Location
- \* Entry Type: Provided, Missed or Make-Up
- \* ICD 10 Codes
- \* CPT Codes
- \* Does Not Meet Medicaid Requirements
- \* Progress
- \* Notes - also referred to as session notes, treatment notes or treatment logs.



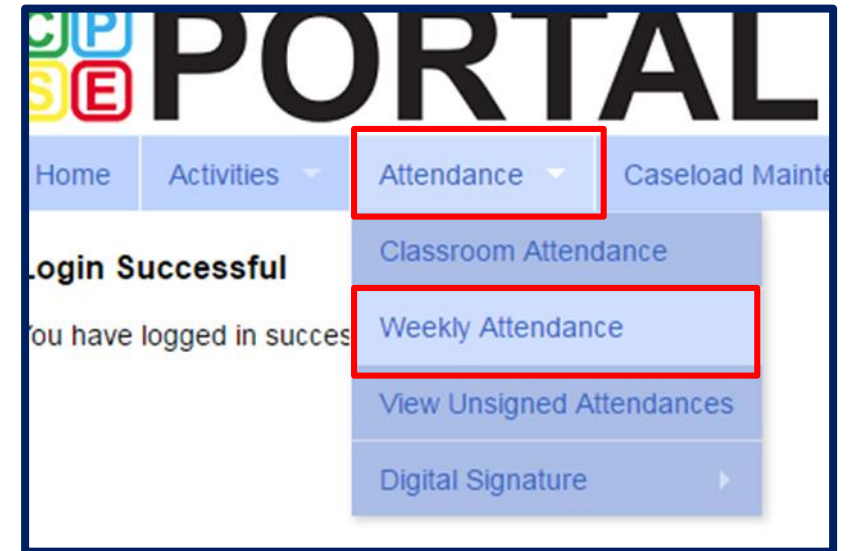
# Attendance Entry – CBRS (Center Based Related Services)

- \* The services provided to a child in a Center Based program is called Center Based Related Services, which is commonly called CBRS.
- \* Even though CBRS is included within the cost of the tuition, it is **imperative** that **ALL** CBRS have attendance/session notes entered into the Portal.
- \* **These session notes are needed for the County to be able to bill Medicaid for any services provided for possible reimbursement.**



# Weekly Attendance - Recording Attendance / Treatment Logs

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





# Weekly Attendance Calendar

## Weekly Attendance

HUFF, AGUSTIN



Jump To: 05/26/24

Save

<< today >>

May 26, 2024 - Jun 01, 2024

	Sunday May 26, 2024	Monday May 27, 2024	Tuesday May 28, 2024	Wednesday May 29, 2024	Thursday May 30, 2024	Friday May 31, 2024	Saturday Jun 01, 2024
7AM							
8AM							
9AM							
10AM							
11AM							
12PM							
1PM							
2PM							
3PM							
4PM							





# Weekly Attendance Calendar

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

**Weekly Attendance**

HOFFMAN, KRISTEN ▾ Jump To: 02/28/21

<< today >>   Feb 28, 2021 - Mar 06, 2021

	Sunday Feb 28, 2021	Monday Mar 01, 2021	Tuesday Mar 02, 2021	Wednesday Mar 03, 2021
7AM				
8AM				
9AM		09:00 am to 09:30 am DUDLEY HARDEN 09:30 am to 10:00 am PRUDENCE THORNTON	08:45 am to 09:15 am JERROD BENTON	09:00 am to 09:30 am DUDLEY HARDEN 09:30 am to 10:00 am PRUDENCE THORNTON
10AM		10:05 am to 10:35 am FREDRICK POWERS 10:45 am to 11:15 am ERNEST FOSTER	10:05 am to 10:35 am TAD STOVALL 10:45 am to 11:15 am LOWELL HOLBROOK	10:10 am to 10:40 am FREDRICK POWERS
11AM		11:40 am to 12:10 pm DOLL AND MONTALVO	11:20 am to 11:50 am PAULINE PEOPLES	11:15 am to 11:45 am JERROD BENTON



# Attendance Entry Screen

## \* This screen has fields for:

- \* Time In / Time Out - 1
- \* Setting / Location - 2
- \* # of sessions to bill (should be 1 for most related services) SEIT may be in increments of 30 or 60 minute sessions (per IEP) (I.E. – 2x30 or 1x60) - 3
- \* Co-Visit with Supervisor - 4
- \* Child (enrollment) - 5
- \* Entry Type - 6
- \* ICD Codes - 7
- \* CPT Codes - 8
- \* Does Not Meet Medicaid Requirements 9
- \* Progress indicator - 10
- \* Notes - 11

New Session for May 28, 2024

Time In: 09:00 AM 1 Time Out: 09:30 AM 2 Setting: Not Selected

Bill this session as: 1 x minute session(s) 3

☐ Co-Visit with Supervisor 4 Location:

[ Child 1 ]

Enrollment: Not Selected 5

ESID Service Type Nickname Frequency 6

Entry Type: 7

Diagnosis Code(s): Search by code or description...

CPT Codes: [Lookup]	Units:
8	

9 ☐ Does Not Meet Medicaid Requirements

10 Progress: ☐ Regression ☐ No Progress ☐ Limited Progress ☐ Progress

Session Notes:

11

Signature: \_\_\_\_\_

Profession: SLP License: \_\_\_\_\_ NPI: \_\_\_\_\_

save cancel



# Attendance Entry – Time, Setting & Location

- \* You can modify the Time In / Time Out to match exact times.
- \* Choose the setting that most closely matches the setting where the service was provided.
- \* Provide a description of the location – I.E. : ABC Daycare or address of daycare.

The screenshot shows a web form titled "New Session for Mar 5, 2021". It contains several input fields. A red box highlights the "Time In" field with the value "11:15" and an "AM" dropdown, and the "Time Out" field with the value "11:30" and an "AM" dropdown. Another red box highlights the "Setting" dropdown menu, which currently shows "Daycare". A third red box highlights the "Location" dropdown menu, which currently shows "Little Red Schoolhouse, Hurley, NY". Below the time fields, there is a field for "Bill this session as:" with the value "1" and the text "x30 minute session(s)". At the bottom left, there is a checkbox labeled "Co-Visit with Supervisor" which is currently unchecked.



# Setting & Location

- \* The “**Setting**” on the session note is where the service was rendered. (School, Clinic, Other).
- \* How specific do you need to be when indicating the “Setting?”
  - \* *The setting indicated on session notes should be reflective of the actual location in which the service was delivered. For example...*
    - \* *Public School*
    - \* *Private Preschool or Daycare Setting*
    - \* *BOCES Classroom*

*If there is more than one location associated with the same name, then the setting must uniquely be identified in the session note.*

*(e.g., the physical address could be recorded as the specific “location” for the BOCES Classroom).*
- \* Entering both the **Setting & Location** on the session note will ensure that all the required Medicaid components are entered and you won’t have to un-sign the note and add it as a correction.



# Attendance Entry – # of Sessions

- \* Enter the # of sessions / units to submit to the County.
- \* In top example, this entry would be for one 45 minute session.
- \* In bottom example, this would represent a one hour SEIT session that would be submitted as two 30 minute sessions (this should always match the IEP).

New Session for May 13, 2016

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

x 45 minute session(s)

☐ Co-visit with Supervisor

New Session for May 11, 2016

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

x 30 minute session(s)

☐ Co-visit with Supervisor



# Attendance Entry – Co-Visit with Supervisor

- \* This is for UDO/USO entries where the Supervisor is doing a co-visit with the COTA, PTA, CFY, etc.
- \* This is **NOT** for indicating a co-visit with a different discipline.
- \* When the check box is marked, a drop down of supervisors will appear to allow the user to specify who the co-visit was with.

New Session for Mar 5, 2021

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

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

☐ Co-Visit with Supervisor Location: Little Red Schoolhouse, Hurley, NY

☒ Co-Visit with Supervisor

[ Child 1 ]

Nickname Frequency

e(s): e or description...

CPT Codes: [Lookup] Units:

COX, LADONNA  
DIEHL, KRYSTYNA  
DOSS, MAYBELLE  
HUFF, AGUSTIN  
LONG, LAKIESHA  
MACDONALD, DAVIS  
MOODY, MANA  
PACE, NOEMI  
TRIPP, TERESA  
WISE, FRANKIE



# Attendance Entry – Selecting the Child / Enrollment

- \* The “Child” list are all enrollments assigned to the therapist.
- \* Each enrollment entry list includes:
  - \* Child’s Name
  - \* Frequency
  - \* Service Type
  - \* Individual vs. Group
  - \* Date range
- \* Select the appropriate child
- \* **Warning!** Be careful when selecting if there are multiple lines for a child when:
  - \* You provide both therapy and service coordination.
  - \* The child has both individual and group enrollments.

The screenshot shows the 'New Session for Apr 7, 2023' form. The 'Enrollment' dropdown menu is open, displaying a list of enrollment entries. A red arrow points to the dropdown menu, and another red arrow points to the first entry, 'AIGBE-LEBARTY, ERONMWON 3x30 - ST - I 10/17/22 - 06/23/23 Daycare'.

Time In: 09:00 AM Time Out: 09:15 AM Setting: Daycare

Bill this session as: 0.50 x30 minute session(s) Location: Little Red School House, Hurley, NY

☐ Co-Visit with Supervisor

[AIGBE-LEBARTY, ERONMWON]

Enrollment:

- AIGBE-LEBARTY, ERONMWON 3x30 - ST - I 10/17/22 - 06/23/23 Daycare
- Not Selected
- AIGBE-LEBARTY, ERONMWON 3x30 - ST - I 10/17/22 - 06/23/23 Daycare
- ALEX, COLIN 2x30 - ST - I 02/14/23 - 06/23/23
- ALEX, COLIN 1x30 MONTHLY - COR - I 04/04/23 - 06/23/23
- BARBER, ZOEY 2x30 - ST1 - G 02/06/23 - 06/23/23
- BONFANTE, AUSTIN 2x30 - ST - I 09/07/22 - 06/23/23
- CHATOO, VINCENT 2x30 - ST1 - G 11/07/22 - 06/23/23

The screenshot shows the 'New Session for Apr 7, 2023' form. The 'Enrollment' dropdown menu is open, displaying the details for the selected enrollment: 'AIGBE-LEBARTY, ERONMWON 3x30 - ST - I 10/17/22 - 06/23/23 Daycare'. A red box highlights the 'ESID', 'Nickname', 'Service Type', and 'Frequency' fields.

Time In: 09:00 AM Time Out: 09:15 AM Setting: Daycare

Bill this session as: 0.50 x30 minute session(s) Location: Little Red School House, Hurley, NY

☐ Co-Visit with Supervisor

[AIGBE-LEBARTY, ERONMWON]

Enrollment:

AIGBE-LEBARTY, ERONMWON 3x30 - ST - I 10/17/22 - 06/23/23 Daycare

ESID RS2223W0026012 Nickname

Service Type ST Frequency 3 x 30



# Attendance Entry – Entry Type

\* This field contains 3 entry types:

- \* Provided Treatment Session
- \* Missed Treatment Session
- \* Make Up Session with date to enter

[AIGBE-LEBARTY, ERONMWON]

Enrollment: AIGBE-LEBARTY, ERONMWON 3x30 - ST - I 10/17/22 - 06/23/23 Dayc: ▼

ESID RS2223W0026012 Nickname

Service Type ST Frequency 3 x 30

Entry Type: **Provided Treatment Session** ▼

[AIGBE-LEBARTY, ERONMWON]

Enrollment: AIGBE-LEBARTY, ERONMWON 3x30 - ST - I 10/17/22 - 06/23/23 Dayc: ▼

ESID RS2223W0026012 Nickname

Service Type ST Frequency 3 x 30

Entry Type: **Missed Treatment Session** ▼

[AIGBE-LEBARTY, ERONMWON]

Enrollment: AIGBE-LEBARTY, ERONMWON 3x30 - ST - I 10/17/22 - 06/23/23 Dayc: ▼

ESID RS2223W0026012 Nickname

Service Type ST Frequency 3 x 30

Entry Type: **Make Up Session** ▼ Make Up for:



# Attendance Entry - Provided Treatment Session

- \* Under Entry Type drop down:
- \* select Provided Treatment Session

**New Session for Apr 7, 2023**

Time In:   Time Out:   Setting:

Bill this session as:  x30 minute session(s)  
☐ Co-Visit with Supervisor Location:

**[AIGBE-LEBARTY, ERONMWON]** Enrollment:

**ESID** RS2223W0026012 **Nickname**  
**Service Type** ST **Frequency** 3 x 30  
**Entry Type:**

♥ Diagnosis Code(s):

CPT Codes: [Lookup]		Units:
♥ <input type="text" value="92507"/>	TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/OR AUDITORY PROCESSING DISORDER; INDIVIDUAL	<input type="text" value="1"/>
♥ <input type="text"/>		<input type="text"/>
♥ <input type="text"/>		<input type="text"/>
♥ <input type="text"/>		<input type="text"/>
♥ <input type="text"/>		<input type="text"/>

☐ Does Not Meet Medicaid Requirements

**Progress:** ☐ Regression ☐ No Progress ☐ Limited Progress ☐ Progress

Session Notes:



# Attendance Entry – Diagnosis Code (ICD Code)

- \* Type the start of the diagnosis code (or entire code)... pause for a second for list to fill... choose code.
- \* Once chosen, the code will show in the text box highlighted in light blue.

♥ Diagnosis Code(s):

Search by code or description...

♥ Diagnosis Code(s):

F84

F84

Pervasive developmental disorders

F84.0

Autistic disorder

F84.2

Rett's syndrome

F84.3

Other childhood disintegrative disorder

F84.5

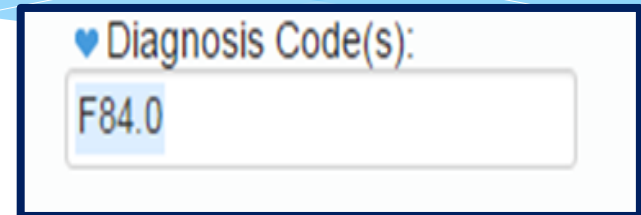
♥ Diagnosis Code(s):

F84.0

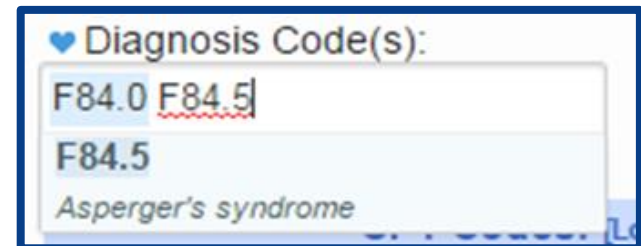


# Attendance Entry – Additional Diagnosis Codes (ICD Code)

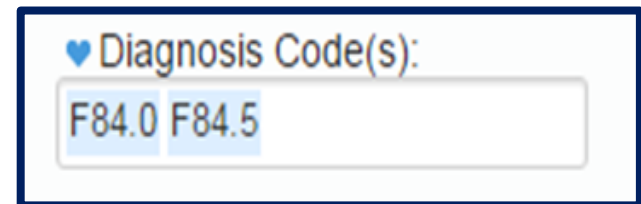
- \* To add additional ICD codes:
  - \* Click the blank space to the right of the last diagnosis code displayed.
  - \* Type the new code... when the list appears... select the correct one.
  - \* The additional codes will be displayed in the text box.



♥ Diagnosis Code(s):  
F84.0



♥ Diagnosis Code(s):  
F84.0 F84.5  
F84.5  
Asperger's syndrome



♥ Diagnosis Code(s):  
F84.0 F84.5



# Attendance Entry – Diagnosis Favorites (ICD Code)

- \* You can go to **My Account -> My Profile** and under the Favorites tab you can enter the most common ICD Codes & CPT Codes that you will use.
- \* Click the blue heart next to the Diagnosis Code(s) label.
- \* A list of the diagnosis that you pre-configured as “favorites” (My Profile screen) will appear.
- \* Choose the appropriate diagnosis.

**My Profile**

Personal and Professional | User Information | **Favorites** ♥

**Favorite ICD Codes**

ICD Code	Version	
F80.0	10	Remove
F80.1	10	Remove
F80.2	10	Remove
F80.81	10	Remove

Search by code or description...

Add

**Favorite CPT Codes**

CPT Code	
92507	Remove
92508	Remove
99366	Remove

Search by code or description...

Add

♥ Diagnosis Code(s):

Search by code or description...

♥ S

F84 - Pervasive developmental disorders

F84.0 - Autistic disorder

F84.5 - Asperger's syndrome

X



# ICD Codes

## Billable versus Non-Billable Codes

- \* Medicaid does not accept all ICD Codes for Medicaid reimbursement purposes.
- \* The Portal has an **ICD Code Lookup** feature (Lookup -> ICD Code Lookup) where you can enter a specific ICD Code to see if the code will meet Medicaid requirements for billing.
- \* The list will tell you whether the code is **OK** or if the code **Requires additional digits**.

Search by...  
Version: ☐ ICD9 ☒ ICD10  
ICD Code begins with  Short description contains

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



# ICD Codes

## Billable versus Non-Billable

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

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

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

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

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

### Specific developmental disorders of speech and language F80-

#### Codes

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



# ICD Codes

## Non-Billable ICD Codes on Prescriptions

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



# Attendance Entry – CPT Code

- \* Type the CPT Code into the box.
- \* The description will appear and the units will default to “1”.
- \* If the CPT Code is an untimed code, leave the units as “1” (top example).
- \* If the CPT Code is a timed code (typically based in 15 minute units), then change the number of units (bottom example).
- \* Click the blue heart next to the CPT Code(s) to create favorites.



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

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



# Attendance Entry – CPT (Current Procedural Terminology) Codes

- \* CPT Codes (*Current Procedural Terminology*) is a uniform language for coding medical services and procedures. Using CPT Codes increases the accuracy and efficiency of reporting medical treatments.
- \* CPT codes are used to identify reimbursement rates. Claims that are submitted to Medicaid must include an appropriate CPT code.
- \* CPT Codes are either **timed** or **untimed**. Timed codes require the **entry of units**, which must be indicated on the session note. (e.g., PT service (97532) is being billed for 30 minutes – two units would need to be billed because 97532 is a 15-minute CPT code.)

Time In: <input type="text" value="10:00"/> <input type="text" value="AM"/>	Time Out: <input type="text" value="10:30"/> <input type="text" value="AM"/>	CPT Codes: [Lookup]		30-Minute Session Two 15-Minute Units	Units:
			<input type="text" value="97532"/> DEVELOPMENT OF COGNITIVE SKILLS TO IMPROVE ATTENTION, MEMORY, PROBLEM SOLVING (INCLUDES COMPENSATORY TRAINING), DIRECT (ONE-ON-ONE) PATIENT CONTACT BY THE PROVIDER, EACH 15 MINUTES		 <input type="text" value="2"/>

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



# Attendance Entry – CPT Codes

- \* Untimed codes are used on a **one-per-session/per day** basis.
  - \* Therefore, enter CPT Codes in units.
  - \* Do not enter duplicate CPT Codes.
  - \* Do not enter a CPT Code and NOCPT.
- \* Below are 3 examples:

This entry is correct with 2 CPT Codes & 1 unit each.

CPT Codes: [Lookup]	Units:
♥ 97530 THERAPEUTIC ACTIVITIES, DIRECT (ONE-ON-ONE) PATIENT CONTACT BY THE PROVIDER (USE OF DYNAMIC ACTIVITIES TO IMPROVE FUNCTIONAL PERFORMANCE), EACH 15 MINUTES	1
♥ 97533 SENSORY INTEGRATIVE TECHNIQUES TO ENHANCE SENSORY PROCESSING AND PROMOTE ADAPTIVE RESPONSES TO ENVIRONMENTAL DEMANDS, DIRECT (ONE-ON-ONE) PATIENT CONTACT BY THE PROVIDER, EACH 15 MINUTES	1

This entry is correct with 1 CPT & 2 units.

CPT Codes: [Lookup]	Units:
♥ 97530 THERAPEUTIC ACTIVITIES, DIRECT (ONE-ON-ONE) PATIENT CONTACT BY THE PROVIDER (USE OF DYNAMIC ACTIVITIES TO IMPROVE FUNCTIONAL PERFORMANCE), EACH 15 MINUTES	2

This entry is wrong. There are duplicate codes & NOCPT.

CPT Codes: [Lookup]	Units:
♥ 97530 THERAPEUTIC ACTIVITIES, DIRECT (ONE-ON-ONE) PATIENT CONTACT BY THE PROVIDER (USE OF DYNAMIC ACTIVITIES TO IMPROVE FUNCTIONAL PERFORMANCE), EACH 15 MINUTES	1
♥ 97530 THERAPEUTIC ACTIVITIES, DIRECT (ONE-ON-ONE) PATIENT CONTACT BY THE PROVIDER (USE OF DYNAMIC ACTIVITIES TO IMPROVE FUNCTIONAL PERFORMANCE), EACH 15 MINUTES	1
♥ NOCPT No CPT Code for this service	1
♥ [ ]	[ ]
♥ [ ]	[ ]



# CPT Codes – Timed vs. Untimed

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

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



# When To Use “Does Not Meet Medicaid Requirements”

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



☐ Does Not Meet Medicaid Requirements

Progress: ☐ Regression ☐ No Progress ☐ Limited Progress ☐ Progress

- \* The checkbox should be checked for situations where the provided session does not meet Medicaid requirements. Such as...
  - The child is sleeping during the session.
  - The child was picked up by the parent in the middle of the session.
  - The child’s behavior did not allow the session to be completed in its entirety; goals could not be met.
  - The service provider and child were outside for a fire drill and as a result the session was not provided.
  - The IEP was for group, but there are more than 5 students in the group. If the group exceeds 5 students, then the whole group will be marked as “Does Not Meet Medicaid Requirements”.

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

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



# Attendance Entry – Progress

- \* Session Notes must include “Progress” made. In addition to checking the radio buttons for Regression, No Progress, Limited Progress or Progress, the session note description should include progress for the session.

**New Session for May 16, 2023**

Time In: 09:00 AM Time Out: 09:30 AM Setting: **Preschool**

Bill this session as: 1.00 x30 minute session(s) Location: **Learning Together**

☐ Co-Visit with Supervisor

**[BEST, ELMO]**

Enrollment: **BEST, ELMO 3x30 - ST - I 09/06/22 - 06/23/23 Preschool**

**ESID** CBR2223W0036890 **Nickname**

**Service Type** ST **Frequency** 3 x 30

Entry Type: **Provided Treatment Session**

♥ Diagnosis Code(s): **F80.2**

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

☐ Does Not Meet Medicaid Requirements

**Progress:** ☐ Regression ☐ No Progress ☐ Limited Progress ☐ Progress

Session Notes:



# Attendance Entry – Session Note

- \* According to SED, a session note is a “Brief description of the student’s progress made by receiving the service during the session”.
- \* You can create goals that will populate to each note. Then you will need to update or remove the goal for the specific session.

**Progress:** ☐ No Progress ☐ Limited Progress ☒ Progress

Session Notes:

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

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



# Attendance Entry - Example of Medicaid Session Note

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

SAMPLE SESSION NOTE – (Includes all Medicaid-required elements)	
Student Name: <u>John Smith</u>	Service Type: <u>Speech Therapy</u>
Date: <u>December 10, 2015</u>	Location: <u>Springdale Elementary</u>
Time in/Time out: <u>10:00am / 10:30am</u>	Indiv (I) Group (G) (incl # in group): <u>I</u>
Practitioner Name: <u>Martha Clark</u>	
Session Note: <u>During this session John produced initial, medial, and final /l/ with 80% accuracy in words. John is demonstrating good progress. He continues to improve his production of the /l/ in all positions in single words.</u>	
<u>Martha Clark TSHH</u> Practitioner's signature, title, and credentials	<u>Martha Clark SLP 1/8/16</u> Dated supervising signature and credentials if UDO required



# A Completed & Signed Session Note

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

CPSE PORTAL					Treatment Log			
Child Name				DOB	Billing Provider		NPI	
CURRIE, QUENTIN 1)				12/12/17	ACHIEVEMENTS		1316190903	
Service	Individual/Group	IEP From	IEP To	District			County	
Speech Therapy 2)	3) Individual	09/07/22	06/23/23	ROTTERDAM-MOHONASEN CSD			SCHENECTADY	
Frequency	ESID			Rendering Provider		License	NPI	
2x30	RS2223W0017241			ADELAIDE CARVER		030860	1811511298	
Date Of Service	Time In 5)	Time Out	Duration	# in Group	Supervising Provider (UDO/USO)		License	NPI
09/12/22	02:30 PM	03:00 PM	30					
Setting 4)	Location *			Referring Provider			NPI	
Preschool	123 Main Street, Schenectady, NY							
CPT	Units	Minutes	Description		ICD	Description		
92507	1	9)	TREATMENT OF SPEECH, LANGUAGE, VOICE, 10)		F80.1	Expressive language disorder		
Session Notes: Activity Related to IEP Goals (including objectives and measures of success) and response(s) of child								
6) Quentin was engaged and attentive throughout the session. Given picture cards, he was able to identify appropriate responses when choices were provided with 70% accuracy given moderate cues. He accurately differentiated between items that were the "same" and "different" with 70% accuracy.								
Name, Title and Credentials				NPI	License	Date Signed	Signature Method	
Rendering Provider 7) Kelly Thayer, M.S.Ed., CCC-SLP				1811511298	030860	8) 10/04/22	DIGITAL	
UDO/USO Supervisor								
QA Review								



# Attendance Entry – Missed Treatment Session

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

New Session for Apr 7, 2023

Time In: 09:45 AM Time Out: 10:15 AM Setting: Daycare

Bill this session as: 1.00 x30 minute session(s) Location: Little Red School House, Hurley, NY

☐ Co-Visit with Supervisor

[AIGBE-LEBARTY, ERONMWON]

Enrollment: AIGBE-LEBARTY, ERONMWON 3x30 - ST - I 10/17/22 - 06/23/23 Days: v

ESID RS2223W0026012 Nickname

Service Type ST Frequency 3 x 30

Entry Type: Missed Treatment Session

Diagnosis Code(s): NOICD

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

☒ Does Not Meet Medicaid Requirements

Progress: ☐ Regression ☐ No Progress ☐ Limited Progress ☐ Progress

Session Notes:



# Attendance Entry – Future Missed Treatment Sessions

- \* If you are entering a Missed Treatment Session for the future:
  - \* The NOICD code and the NOCPT code will not automatically prefill for you.
- \* Therefore, make sure you enter these codes so you do not get an error when signing your attendance.



# Attendance Entry – Missed Treatment Session

- \* The Missed Treatment Session will appear in red on the Weekly Attendance screen.
- \* You can have 2 children in the same time slot, as in the example below, one session is provided & one session is missed.

Weekly Attendance

Knowles, Kelly

Jump To: 03/12/23

Save

<< today >>

Mar 12, 2023 - Mar 18, 2023

Sunday Mar 12, 2023	Monday Mar 13, 2023	Tuesday Mar 14, 2023	Wednesday Mar 15, 2023	Thursday Mar 16, 2023	Friday Mar 17, 2023	Saturday Mar 18, 2023
7AM						
8AM						
9AM	09:00 am to 09:30 am ANTONIO	09:00 am to 09:30 am HILEARY				
10AM						
11AM						
12PM						



# Attendance Entry – Make Up Session

- \* If session is a makeup:
  - \* Choose the Entry Type - Make Up Session.
  - \* In the corresponding date box that appears, indicate the date of the missed session that is being made-up.
  - \* If a session is made up in the same week, it is **NOT** a make-up.
  - \* If a session is not made up in the same week, then it should be entered as a “Make-Up” with a “Make-up for Date”.

New Session for Apr 7, 2023

Time In: 09:45 AM Time Out: 10:15 AM Setting: Daycare

Bill this session as: 1 x30 minute session(s) Location: Little Red School House, Hurley, NY

☐ Co-Visit with Supervisor

[AIGBE-LEBARTY, ERONMWON]

Enrollment: AIGBE-LEBARTY, ERONMWON 3x30 - T - I 10/17/22 - 06/23/23 Dayc

ESID RS2223W0026012 Nickname

Service Type ST Frequency 3 x 30

Entry Type: Make Up Session Make Up for: 04/03/2023

Diagnosis Code(s): F80.2

CPT Codes: [Lookup] Units:

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

☐ Does Not Meet Medicaid Requirements

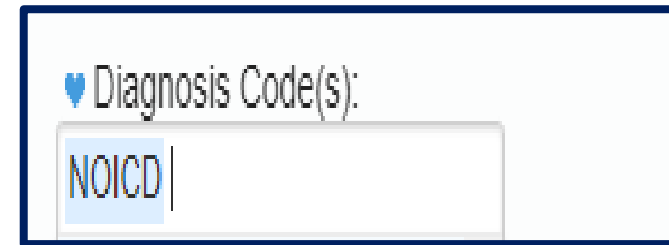
Progress: ☐ Regression ☐ No Progress ☐ Limited Progress ☐ Progress

Session Notes:



# When to Use NOICD Code

- \* If you are a provider that does not require an ICD Code, then you can enter **NOICD**.
  - \* SEIT,
  - \* TOD,
  - \* TVI etc.....
- \* Or a missed session will be NOICD.



A screenshot of a software interface for entering diagnosis codes. It features a label '♥ Diagnosis Code(s):' followed by a text input field. The input field contains the text 'NOICD' and has a vertical cursor at the end of the text. The entire input area is enclosed in a dark blue rectangular border.



# When to Use NOCPT Code

- \* If you are a provider that does not require a CPT Code, then you can enter NOCPT.
- \* Or a missed session will be NOCPT.

CPT Codes: [Lookup]		Units:
♥	<input type="text" value="NOCPT"/> No CPT Code for this service	<input type="text" value="1"/>
♥	<input type="text"/>	<input type="text"/>





# Group Attendance



# Group Attendance

- \* Group attendance is entered using same screen.
- \* If the chosen enrollment is for “group” the screen adds:
  - \* A field to enter # of children in the Group.
  - \* Links to select the other children in the group. The selected child is in bold.
  - \* The child name appears as the generic “Child X” until you select an enrollment for Child X.
- \* The screen provides for the ability to enter separate ICD, CPT and notes for each child.
- \* On the calendar, they display as “GRP” and then the last names.

New Session for Jun 20, 2016

Time In: 09:15 AM Time Out: 09:45 AM Setting: Preschool

1 x 30 minute session(s)

☐ Co-Visit with Supervisor

Number of Children in Group: 3

[BERTRAND, GORDON]  
**[BIRCH, BRENT]**  
[Child 3]  
[Child 4]  
[Child 5]

Child 2: BIRCH, BRENT 2x30 - ST - G 12/21/15 - 06/24/16

♥ Diagnosis Code(s):  
Search by code or description...

CPT Codes: [Lookup] Units:

[BERTRAND, GORDON]  
[BIRCH, BRENT]  
**[Child 3]**  
[Child 4]  
[Child 5]

Child 3: Not Selected

♥ Diagnosis Code(s):  
Search by code or description...

09:15 am to 09:45 am  
GRP BERTRAND, BIRCH



# Group Attendance

Edit - GRP BARBER (Apr 7, 2023)

Time In: 10:00 AM Time Out: 10:15 AM Setting: Classroom

Bill this session as: 0.5 x30 minute session(s)

☐ Co-Visit with Supervisor Little Red School House, Hurley, NY

Number of Children in Group This Session: 3

**BARBER, ZOEY**

Enrollment: BARBER, ZOEY 2x30 - ST1 - G 02/06/23 - 06/23/23

ESID RS2223W0018072 Nickname

Service Type ST1 Frequency 2 x 30

Entry Type: Provided Treatment Session

Diagnosis Code(s): F80.2

CPT Codes: [Lookup]	Units:
92508 TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/OR AUDITORY PROCESSING/DISORDER, GROUP, 2 OR MORE INDIVIDUALS	1
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

☐ Does Not Meet Medicaid Requirements

Progress: ☐ Regression ☐ No Progress ☐ Limited Progress ☐ Progress

Session Notes:

test

Signature: Betty Speech Pathologist CCC-SLP

save cancel delete

Edit - GRP BARBER (Apr 7, 2023)

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

Setting: Classroom

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

☐ Co-Visit with Supervisor

Location: Little Red School House, Hurley, NY

Number of Children in Group This Session: 3

[BARBER, ZOEY]  
[CHATOO, VINCENT]  
[ Child 3]  
[ Child 4]  
[ Child 5]

Child 2:  
CHATOO, VINCENT 2x30 - ST1 - G 11/07/22 - 06/23/23  
ESID RS2223W0017818 Nickname  
Service Type ST1 Frequency 2 x 30  
Entry Type: Provided Treatment Session  
Diagnosis Code(s):  
F80

CPT Codes: (Lookup)
Units:

92508 TREATMENT OF SPEECH LANGUAGE, VOICE, COMMUNICATION, AND/OR AUDITORY PROCESSING DISORDER, GROUP, 2 OR MORE INDIVIDUALS
1

☐ Does Not Meet Medicaid Requirements

Progress: Regression No Progress Limited Progress Progress

Session Notes:  
test note

Signature: Betty Speech Pathologist CCC-SLP

save cancel delete

**Edit - GRP BARBER, CHATOO (Apr 7, 2023)**

Time In:   Time Out:   Setting:

Bill this session as:  x30 minute session(s)

☐ Co-Visit with Supervisor Location:

Number of Children in Group This Session:

Child 3:   
 ESID:  Nickname:  
 Service Type:  Frequency:   
 Entry Type:   
 ☒ Diagnosis Code(s):

CPT Codes: <a href="#">[Lookup]</a>	Units:
<input checked="" type="checkbox"/> 92508 TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/OR AUDITORY PROCESSING DISORDER, GROUP, 2 OR MORE INDIVIDUALS	<input type="text" value="1"/>
<input checked="" type="checkbox"/> <input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> <input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> <input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> <input type="text"/>	<input type="text"/>

☐ Does Not Meet Medicaid Requirements

Progress: ☐ Regression ☐ No Progress ☐ Limited Progress ☐ Progress

Session Notes:

test

Signature:  Speech Pathologist. CCC-SLP

Friday  
Apr 07, 2023

Saturday  
Apr 08, 2023

09:00 am: ERONMWON AIGBE-LEBARTY

10:00 am to 10:30 am  
GRP BARBER, CHATOO, CORREA



# Group Attendance

# One or More Children Absent

- \* If a child in the group is absent, they cannot be included with the children that are present.
- \* You will select another time slot on your Weekly Calendar, and then change the time back to the time of the original group time.
- \* Enter as a group of 1, and Missed Treatment Session.
- \* Now the group session will be in blue, and the missed child session will be in red on your calendar.

Edit - GRP HANLEY (Apr 7, 2023)

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

Setting: Not Selected

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

☐ Co-Visit with Supervisor

Location:

Number of Children in Group This Session: 1

HANLEY, JAXEN

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

Enrollment:

HANLEY, JAXEN 2x30 - ST1 - G 12/12/22 - 06/23/23

ESID RS2223W0017935 Nickname

Service Type ST1 Frequency 2 x 30

Entry Type: Missed Treatment Session

Diagnosis Code(s):

NOICD

CPT Codes: [Lookup]
Units:

NOCPPT
No CPT Code for this service
1

☒ Does Not Meet Medicaid Requirements

Progress:
Regression
No Progress
Limited Progress
Progress

Session Notes:

test

[illegible]



# Group Attendance of 2 One Child Absent

- \* If you have a group of two, and one child is absent, you cannot enter as a group of two.
- \* Child who is present will be entered as a group of one with an individual CPT code.
- \* The child who is absent will be entered as a Missed Treatment Session.
- \* For a group of 1, you **cannot** use a group CPT code. You must use an individual CPT code or enter a CPT code for a group of 1.

Edit - GRP CHINCHILLA (Apr 7, 2023)

Time In: 10:00 AM Time Out: 10:30 AM Setting: Classroom

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

☐ Co-Visit with Supervisor

Location: Little Red School House, Hurley, NY

Number of Children in Group This Session: 1

[CHINCHILLA, SOFIA]  
[Child 2]  
[Child 3]  
[Child 4]  
[Child 5]

Enrollment: CHINCHILLA, SOFIA 1x30 - ST1 - G 02/06/23 - 06/23/23

ESID RS2223W0018229 Nickname

Service Type ST1 Frequency 1 x 30

Entry Type: Provided Treatment Session

Diagnosis Code(s): F80.2

CPT Codes: [Lookup] Units: 1

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

Edit - GRP HANLEY (Apr 7, 2023)

Time In: 10:00 AM Time Out: 10:30 AM Setting: Classroom

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

☐ Co-Visit with Supervisor

Location: Little Red School House, Hurley, NY

Number of Children in Group This Session: 1

[HANLEY, JAXEN]  
[Child 2]  
[Child 3]  
[Child 4]  
[Child 5]

Enrollment: HANLEY, JAXEN 2x30 - ST1 - G 12/12/22 - 06/23/23

ESID RS2223W0017935 Nickname

Service Type ST1 Frequency 2 x 30

Entry Type: Missed Treatment Session

Diagnosis Code(s): NOICD

CPT Codes: [Lookup] Units: 1

NOCPT No CPT Code for this service

Friday Apr 07, 2023	
09:00 am: ERONMWON AIGBE-LEBARTY	
10:00 am to 10:30 am GRP HANLEY	10:00 am to 10:30 am GRP CHINCHILLA



# Group Attendance with Counties Not Using the Portal

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

New Session for Jun 20, 2016

Time In: 09:15 AM Time Out: 09:45 AM Setting: Preschool

1 x 30 minute session(s)

☐ Co-Visit with Supervisor

Number of Children in Group: 3

[BERTRAND, GORDON]  
[BIRCH, BRENT]  
[Child 3]  
[Child 4]  
[Child 5]

Child 2: BIRCH, BRENT 2x30 - ST - G 12/21/15 - 06/24/16

♥ Diagnosis Code(s):  
Search by code or description...

CPT Codes: [Lookup] Units:

Child 3: Not Selected

♥ Diagnosis Code(s):  
Search by code or description...

09:15 am to 09:45 am  
GRP BERTRAND, BIRCH





# Co-Treatments



# Co-Treatments

- \* Can more than one therapist providing co-treatment bill for the same session? **No.**
  - \* *Co-Treatment consists of more than one professional providing treatment at the same time. Therapists, or therapy assistants, working together as a “Team” to treat one or more individuals cannot bill separately for the same (or different) service provided at the same time to the same individual. For co-treatments only one CPT code may be billed per session.*
- \* Both therapists should complete a session note for the co-treatment, but one therapist should mark their session as, **“Does Not Meet Medicaid Requirements.”**
  - \* *If speech is one treatment, then speech is billable & the other service will mark as not billable.*





# Editing Existing Attendances



# Editing an Existing Attendance

- \* Click any session on the calendar to edit or view the details of the session.
- \* If the fields are greyed out and there is no save button, that means the session is signed and **cannot** be modified without un-signing first.
- \* If you cannot unsign your attendance, then the child is likely on a billing voucher, and needs to be removed. Contact your agency.

Monday May 02, 2016	Tuesday May 03, 2016	Wednesday May 04, 2016	Thursday May 05, 2016	Friday May 06, 2016
			09:00 am to 09:30 am MAGDALENA DELONG	
	09:45 am to 10:15 am TRACY CRAIN	09:20 am to 09:50 am JOSEFA LEVINE		
		10:10 am to 10:40 am MAGDALENA DELONG	10:00 am to 10:30 am TRACY CRAIN	
			10:35 am to 11:05 am TRACEY FELICIANO	
	11:00 am to 11:30 am BRAIN LEVY	11:00 am to 11:30 am BRAIN LEVY		
			11:30 am to 12:00 pm BRAIN LEVY	
	12:00 pm to 12:30 pm TRENT MCCORMACK	12:00 pm to 12:30 pm TRENT MCCORMACK		
	01:00 pm to 01:30 pm MAGDALENA DELONG	01:00 pm to 01:30 pm TRACEY FELICIANO	12:45 pm to 01:15 pm JOSEFA LEVINE	
		01:35 pm to 02:05 pm TRACY CRAIN		
	02:30 pm to 03:00 pm RENE ORTEGA	02:30 pm to 03:00 pm RENE ORTEGA		





# Contemporaneous Records



# Contemporaneous

- \* Session Notes must be completed by all qualified providers furnishing the services authorized in a student's IEP for each Medicaid service.
- \* Service providers must maintain contemporaneous records.
- \* What is the suggested time frame for completing contemporaneous Sessions Notes for Medicaid purposes? *Sessions should be documented as close to the conclusion of the session as practicable.* For supervising clinicians the session note must be signed within 45 days.





# Back-To-Back Sessions



# Back-To-Back Sessions

- \* Back-to-back sessions are Medicaid reimbursable.
- \* How should time in/time out be documented in the session note? (e.g., Student A – 12:00 to 12:30 / Student B – 12:30 to 1:00)
  - \* *Back-to-back sessions are Medicaid reimbursable. If sessions were delivered consistent with the written order, IEP and Medicaid policy then Medicaid may be billed for the sessions. **The session note must reflect the “exact” time that the session was provided.***



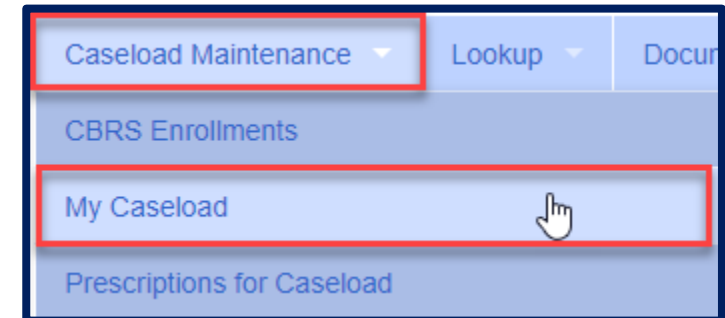


# Creating Defaults for Session Notes



# Creating Defaults

- \* You can create defaults for your session notes / attendances that can include:
  - \* Service Setting,
  - \* Location,
  - \* Default CPT Code,
  - \* Default ICD 10 Code.
  
- \* Go to ***Caseload Maintenance -> My Caseload.***





# Creating Defaults

- \* Click on the “*Defaults*” button at the end of the enrollment.

## My Caseload

Filter By

Provider: LEARNING TOGETHER, INC. ▼

Session: 2023 - 2024 Winter ▼

Search

	Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned		
<input type="checkbox"/>	UnMatched		AMBROSE	FREDRIC	ULSTER	LEARNING TOGETHER, INC.	HIGHLAND CSD	CB	09/05/23	06/21/24			Attendances	Defaults
<input type="checkbox"/>		CPSECBRS0000124607	AMBROSE	FREDRIC	ULSTER	LEARNING TOGETHER, INC.	HIGHLAND CSD	CBRS	09/05/23	06/21/24	PT 2x30 Individual		Attendances	Defaults
<input type="checkbox"/>		CPSECBRS0000124608	AMBROSE	FREDRIC	ULSTER	LEARNING TOGETHER, INC.	HIGHLAND CSD	CBRS	09/05/23	06/21/24	OT1 1x30 Group		Attendances	Defaults
<input type="checkbox"/>		CPSECBRS0000124609	AMBROSE	FREDRIC	ULSTER	LEARNING TOGETHER, INC.	HIGHLAND CSD	CBRS	09/05/23	06/21/24	ST 4x45 Individual		Attendances	Defaults
<input type="checkbox"/>		CPSECBRS0000124610	AMBROSE	FREDRIC	ULSTER	LEARNING TOGETHER, INC.	HIGHLAND CSD	CBRS	09/05/23	06/21/24	PNT 1x30 MONTHLY Individual		Attendances	Defaults
<input type="checkbox"/>	UnMatched		COTTRELL	MELISSA	ULSTER	LEARNING TOGETHER, INC.	MARLBORO CSD	CB	09/05/23	06/21/24			Attendances	Defaults



# Creating Defaults

- \* Now you will enter:
  - \* Service Setting
  - \* Location
  - \* Default CPT Code
  - \* Default ICD 10 Code
- \* You can also enter an enrollment note. Here you can enter the goals off of the IEP, and the goals will then populate to each session note. You can then adjust as needed.



# Creating Defaults

## Enrollment Defaults

### Enrollment Info

Child Name: BOYKIN, MATTIE   Electronic Service ID: RS2122W0016895   Enrollment Type: RS   RS Type: ST  
County: SCHENECTADY   Provider:   District: Schenectady  
Service Nickname:   
Enrollment Notes:

### For each new attendance use these default values

Bill each entry as  30 minute session(s) for a total duration of 30 minutes.

Service Setting:    Location:

### Default CPT Code for new attendance

	CPT Code	Description	Units	
<a href="#">Edit</a>	92507	TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/OR AUDITORY PROCESSING DISORDER; INDIVIDUAL	1	<a href="#">Delete</a>
	<input type="text"/>		<input type="text"/>	<a href="#">Add</a>

### Default ICD10 Code for new attendance

	ICD 10 Code	Description	
<a href="#">Edit</a>	F80.2	Mixed receptive-expressive language disorder	<a href="#">Delete</a>
	<input type="text"/>		<a href="#">Add</a>

Save



# Creating Defaults

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

**New Session for Jun 10, 2022**

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

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

☐ Co-Visit with Supervisor

Setting: **Preschool**

Location: **Little Red Schoolhouse, Hurley, NY**

**[BOYKIN, MATTIE]**

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

Entry Type: **Provided Treatment Session**

Diagnosis Code(s): **F80.2**

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

☐ Does Not Meet Medicaid Requirements

Progress: ☐ No Progress ☐ Limited Progress ☐ Progress

Session Notes:

**save cancel**





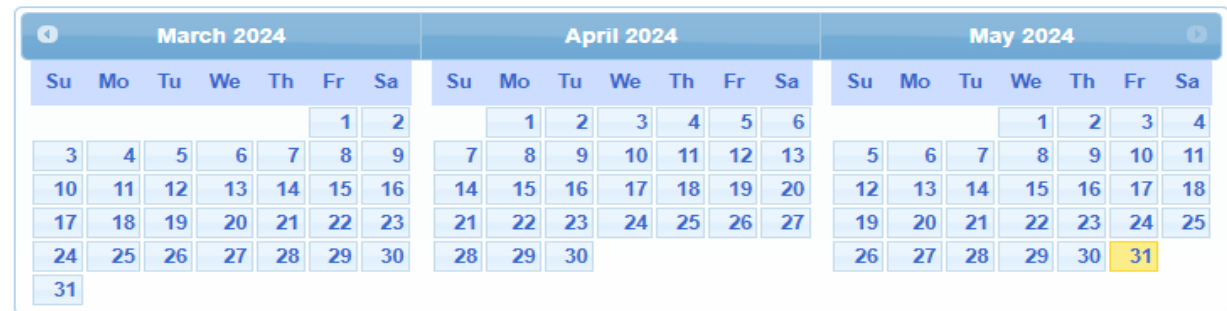
# **Service Coordination Notes**

## **For SEIT ONLY**



# SEIT Service Coordination Notes

- \* If you are a SPED/SEIT teacher and are required by your agency to write a Service Coordination note:
  - \* Go to **Activities -> Activity Management**,
  - \* A three month calendar will then populate.



March 2024							April 2024							May 2024						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				

Showing Activities & Attendances for 5/31/2024

Add Activity

## Activities

No activities found.

## Attendances

No attendances found.



# SEIT Service Coordination Notes

- \* You will select the day that you wish to enter an activity for, and then select the “Add Activity” button.
- \* Now the activity screen will populate.
  - \* In the dropdown under “Activity”, you will choose Coordination Activities.
  - \* Choose the “Enrollment” in the dropdown menu.
  - \* Enter your start and end times.
  - \* Enter your coordination note in the “Notes” box, and click Save.
- \* These notes are **not signed** and are **not** sent to the county. This is just for your records for SEIT service coordination.



# SEIT Service Coordination Notes

The screenshot displays a web application interface for SEIT Service Coordination Notes. At the top, there are three calendar views for March 2024, April 2024, and May 2024. The May 2024 calendar has the 16th highlighted with a red box. Below the calendars, the text "Showing Activities & Attendances for 05/16/2024" is displayed, along with an "Add Activity" button. A modal window titled "Activity for 05/16/2024" is open, showing a form with the following fields:

- Activity:** A dropdown menu with "Coordination Activities" selected, highlighted by a red box.
- Enrollment:** A dropdown menu with "No Enrollment Selected" selected.
- Start Time:** Fields for hour, minute, and a time zone dropdown (currently set to AM).
- End Time:** Fields for hour, minute, and a time zone dropdown (currently set to AM).
- Notes:** A large text area for entering notes.
- Save:** A button at the bottom left of the modal.





# **Signing Attendance / Review and Sign**



# Signing Attendance

- \* After attendance is entered, it needs to be signed.
- \* Once it is signed, it **cannot** be modified without going through the “un-signing” process.
- \* A digital signature is equivalent to signing your name on paper with ink.
- \* A digital signature requires that you intentionally take action to indicate your signature.
- \* The action in CPSE Portal is to enter a PIN that you have chosen.
- \* Your PIN works in conjunction with your username/password.
- \* You should **never** share your password or your PIN with anyone.



# Choosing / Changing Your Pin

- \* Go to **My Account -> My Pin**
- \* Your PIN can be numbers, letters or both.
- \* Choose a PIN and click “*Save PIN*”.
- \* The screen will prompt you to enter your log on password.
- \* This is NOT your PIN, this is the password you use to login to CPSE Portal.
- \* Click “*Proceed*”.

## PIN Selection

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

PIN Number:

## Password Verification

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

Password





# PIN Problems

- \* The # 1 issue with PINs is letting the browser save your PIN.
- \* Ensure when setting / changing your PIN, that your browser doesn't try to overwrite your PIN.

## PIN Selection

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

PIN Number:

## PIN Selection

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

PIN Number:

### Password Verification

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

Password:



# Signing Your Attendance

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



# Therapist Signature In Portal

- \* The Portal Signature shown on the **My Profile** (My Account>My Profile) screen is used on session notes and digital speech recommendations.
- \* The screenshot below shows the proper credentials for an SLP. If the Provider's credentials are not listed in the signature, a prescription or session note is signed with just a name.
  - \* ***Sarah Brown*** is not the same as ***Sarah Brown, Speech Pathologist, CCC-SLP***.
- \* Medicaid states that the provider's ***Name, Title, Signature and Credentials must be listed on a Medicaid Session Note.***

**My Profile**

Personal and Professional | **User Information** | Favorites ♥

Information in CPSE Database

Last Name

First Name

NPI

**Signature, Title, and Credentials**   
(e.g.: Mary Brown, CCC-SLP)





# Review and Sign



# Review and Sign - Profile

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

**Profile**

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

**Signing As:** Betty Gebauer Speech Pathologist, CCC-SLP

**Credentials:**

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

NYS Office of Professions Search

**Missing Attestations:** No Missing Attestations!

**PIN Created** ←

**Unsigned Attendances**

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

**Audit** **By Week** **By Enrollment**

Status	Child	Date of Service	Time In	Time Out	
✗	HESTER, DEWITT	1/11/2022	09:40	10:10	Edit
!	PERSON, LIBERTY	6/18/2020	01:00	01:30	Edit



# Review and Sign – Audit Tab

- \* Within the unsigned attendances, there will also be icons listed under the **Audit tab** in the “Status” column:

✓ A green check means there are no errors

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

✗ A red “X” means there is an error that will prevent signing.

Profile

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

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

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

NYS Office of Professions Search

✓ Missing Attestations: No Missing Attestations!

Edit ✗ PIN Created

Unsigned Attendances

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

**Audit** By Week By Enrollment

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



# Review and Sign - Warnings

- \* By clicking on the icon, you can see what the reason is.

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

**Audit** By Week By Enrollment

Status	Child	Date of Service	Time In	Time Out	
✖	HESTER, DEWITT	1/11/2022	09:40	10:10	<a href="#">Edit</a>
⚠	LIBERTY	6/18/2020	01:00	01:30	<a href="#">Edit</a>
⚠	RHODES, BOBBIE	1/18/2022	11:35	12:05	<a href="#">Edit</a>
⚠	RHODES, BOBBIE	1/20/2022	11:30	12:00	<a href="#">Edit</a>
⚠	RHODES, BOBBIE	1/21/2022	09:40	10:10	<a href="#">Edit</a>

Issues Found With Attendance:

Issue Type	Description	Data Causing Issue
WARNING	Exceeds Weekly Frequency for Enrollment	Enrollment Frequency: 2x30

Ok



# Review and Sign - Errors

- \* Click “*Edit*”, and make appropriate changes to session note.

Unsigned Attendances

School Year Session: (School Year Session) ▼

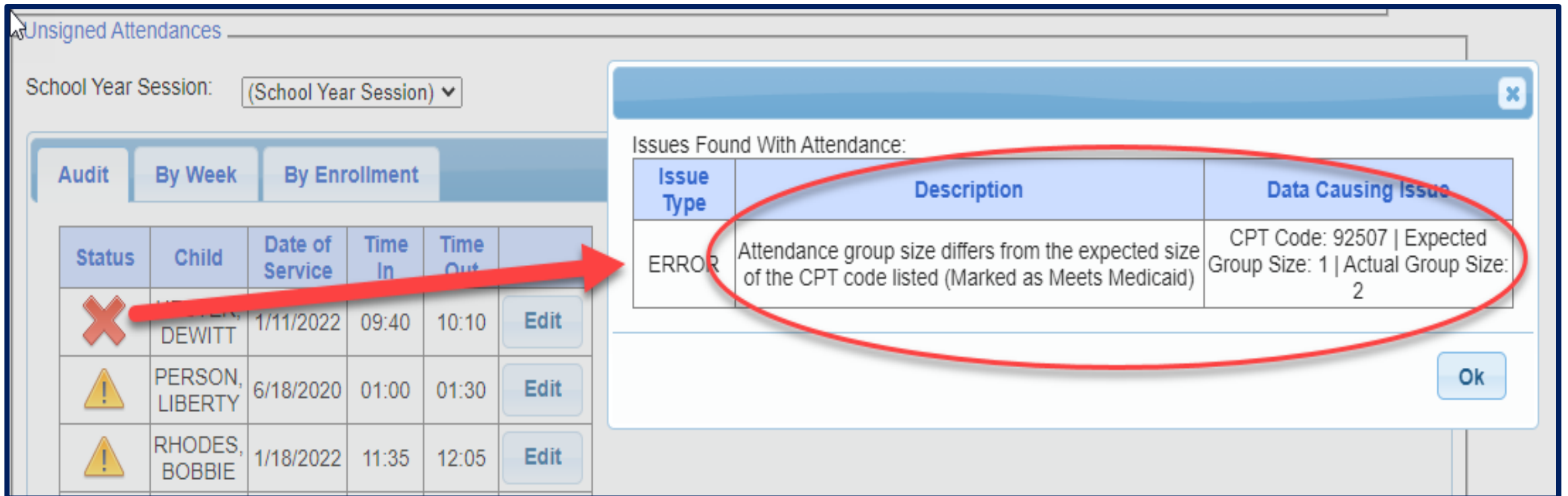
**Audit** By Week By Enrollment

Status	Child	Date of Service	Time In	Time Out	
✖	PERSON, DEWITT	1/11/2022	09:40	10:10	<a href="#">Edit</a>
⚠	PERSON, LIBERTY	6/18/2020	01:00	01:30	<a href="#">Edit</a>
⚠	RHODES, BOBBIE	1/18/2022	11:35	12:05	<a href="#">Edit</a>

Issues Found With Attendance:

Issue Type	Description	Data Causing Issue
ERROR	Attendance group size differs from the expected size of the CPT code listed (Marked as Meets Medicaid)	CPT Code: 92507   Expected Group Size: 1   Actual Group Size: 2

Ok






# Review and Sign - By Week


- \* **By Week:**


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

Profile


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


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

Edit  Credentials:



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

NYS Office of Professions Search

 Missing Attestations: No Missing Attestations!

Edit  PIN Created

Unsigned Attendances

School Year Session: (School Year Session)  

Audit **By Week** By Enrollment

Start Date	End Date	Number Of Unsigned Attendances	Navigation
10/27/2019	11/02/2019	1	Review And Sign
06/14/2020	06/20/2020	1	Review And Sign
01/02/2022	01/08/2022	28	Review And Sign
01/09/2022	01/15/2022	34	Review And Sign
01/16/2022	01/22/2022	30	Review And Sign



# Review and Sign - By Week

- \* You will then be able to toggle between days of the week.
- \* To sign:
  - \* Check the desired boxes & click “Sign”
  - \* If there is a problem with the attendance that you’d like to correct, use the “Edit” button.

Unsigned Attendances

Showing Attendances for the week of: 10/27/2019 - 11/2/2019 Sign

Sunday (0)

Monday (1)











Tuesday (0)

Wednesday (0)

Thursday (0)

Friday (0)

Saturday (0)

<input type="checkbox"/>	Status	Child Name	ESID	Service Type	Service Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes	
<input type="checkbox"/>		BENTON, JERROD	RS1920W0022957	ST	10/28/19	08:00 AM	08:30 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		CHERRY, YONG	RS1920W0014784	ST	10/28/19	09:00 AM	09:30 AM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		WINTERS, LEANORA	RS1920W0014352	ST	10/28/19	09:45 AM	10:15 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		DAVILA, FOSTER	RS1920W0014799	ST	10/28/19	10:35 AM	11:05 AM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		OAKES, CHERYL	RS1920W0022741	ST	10/28/19	11:30 AM	12:00 PM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		NORWOOD, ROSSANA	RS1920W0022744	ST	10/28/19	12:15 PM	12:45 PM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		KRAUSE, EVON	RS1920W0014555	ST1	10/28/19	12:50 PM	01:20 PM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		SALDANA, DONN	RS1920W0014569	ST	10/28/19	01:20 PM	01:50 PM	30	1.00	30	30	92507 (x1)	F80.2	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		HONG, IRA	RS1920W0022745	ST	10/28/19	01:55 PM	02:25 PM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		DAVILA, FOSTER	RS1920W0014800	COR	10/28/19	04:00 PM	04:30 PM	30	1.00	30	30	99366 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<span>Edit</span>



# Review and Sign - By Enrollment

- \* **By Enrollment:**

- \* Under the “By Enrollment” tab, the attendances are listed by enrollment.
- \* You may view more information, as well as sign the attendances, by clicking the “Review & Sign” link under the navigation column.

Profile

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

**Signing As:** Betty Gebauer Speech Pathologist, CCC-SLP

**Credentials:**

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

NYS Office of Professions Search

**Missing Attestations:** No Missing Attestations!

**PIN Created:** ✗

Unsigned Attendances

School Year Session: (School Year Session) ▼ [Apply Filter](#)

**Audit** **By Week** **By Enrollment**

Child	ESID	Service Month	Service	Number Of Unsigned Attendances	Navigation
BROUSSARD, DENVER	RS2122W0016884	January 2022	ST	2	Review And Sign
BROUSSARD, DENVER	RS2122W0016885	January 2022	ST1	4	Review And Sign
DAVILA, FOSTER	RS1920W0014800	October 2019	COR	1	Review And Sign
DELATORRE, CARINA	RS2122W0016811	January 2022	ST	2	Review And Sign
DUFF, TOD	RS2122W0016554	January 2022	ST	6	Review And Sign
ERWIN, DEANDRA	RS2122W0016902	January 2022	ST	2	Review And Sign
ERWIN, DEANDRA	RS2122W0016903	January 2022	ST1	2	Review And Sign
FOSTER, ERNEST	RS2122W0016162	January 2022	ST	2	Review And Sign
FOSTER, ERNEST	RS2122W0016888	January 2022	ST	1	Review And Sign
FOSTER, ERNEST	RS2122W0016889	January 2022	ST1	2	Review And Sign



# Review and Sign – By Enrollment

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

Enrollment Info

Child Name: BROUSSARD, DENVER ESID: RS2122W0016884

Service Type: Speech Therapy IND Frequency: 1x30

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

< January 2022 >

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

Sign Attendance

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



# Sign By Entering PIN

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

Enter PIN

By entering my pin number, I/We certify that on the dates selected, the selected children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

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

Name: KRISTEN HOFFMAN

Signing As: Betty Speech Pathologist, CCC-SLP

NPI: 1508012717

Date: 6/10/2022

Pin:



# Sign Frequently

- \* As a best practice, you should sign frequently.
  - \* After you record your notes for the day, ***sign your attendances.***
- \* Waiting until the end of the month **causes** problems.
  - \* There are too many entries to do a proper review.
  - \* It is too long past the activity to remember anything.



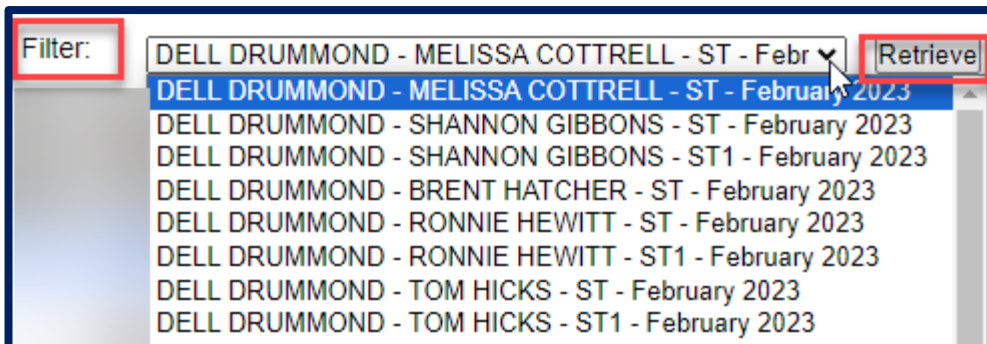


# Co-Signing Session Notes



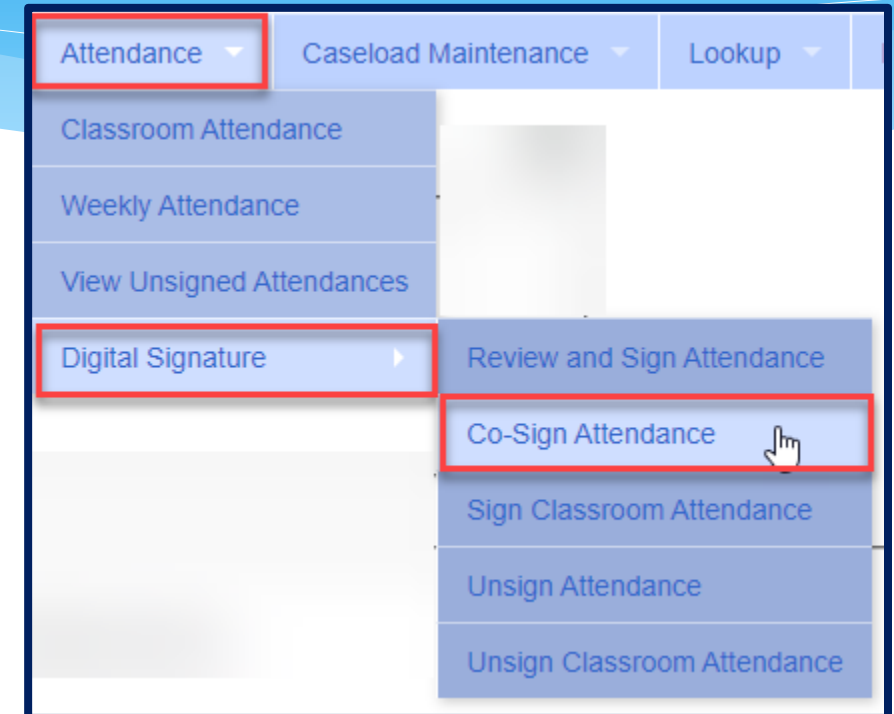
# Co-Signing Session Notes

- \* Go to **Attendance -> Digital Signature -> Co-Sign Attendance**
- \* Use your filter to select date range, therapist or a specific enrollment.



Filter: DELL DRUMMOND - MELISSA COTTRELL - ST - Febr  
DELL DRUMMOND - MELISSA COTTRELL - ST - February 2023  
DELL DRUMMOND - SHANNON GIBBONS - ST - February 2023  
DELL DRUMMOND - SHANNON GIBBONS - ST1 - February 2023  
DELL DRUMMOND - BRENT HATCHER - ST - February 2023  
DELL DRUMMOND - RONNIE HEWITT - ST - February 2023  
DELL DRUMMOND - RONNIE HEWITT - ST1 - February 2023  
DELL DRUMMOND - TOM HICKS - ST - February 2023  
DELL DRUMMOND - TOM HICKS - ST1 - February 2023

Retrieve



Attendance Caseload Maintenance Lookup

Classroom Attendance  
Weekly Attendance  
View Unsigned Attendances  
Digital Signature  
Review and Sign Attendance  
Co-Sign Attendance  
Sign Classroom Attendance  
Unsign Attendance  
Unsign Classroom Attendance



# Co-Signing Session Notes

- \* After reviewing the attendances, select the attendances you wish to sign by clicking the box next to each name.
- \* Click on "*Sign Attendance*"
- \* Read the agreement, enter your PIN and click "*I agree*".
- \* Once the attendances are signed successfully, you will receive a confirmation pop up.



# Co-Signing Session Notes

Filter:

**Service Provider: DELL DRUMMOND**

**Child: MELISSA COTTRELL**

**Service Type: ST**

**Month: February 2023**

<input type="checkbox"/>	Service Date	Service Setting	CoVisit Therapist	Make Up For	Start Time	End Time	CPT Codes	ICD Code	Notes	<input type="button" value="View"/>
<input type="checkbox"/>	2/01/2023	Preschool			10:30 AM	11:00 AM	92507	F80.4	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>
<input type="checkbox"/>	2/02/2023	Preschool			1:30 PM	2:00 PM	92507	F80.4	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>
<input type="checkbox"/>	2/03/2023	Preschool			12:30 PM	1:00 PM	92507	F80.4	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>
<input type="checkbox"/>	2/07/2023	Preschool			10:30 AM	11:00 AM	92507	F80.4	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>
<input type="checkbox"/>	2/08/2023	Preschool			10:00 AM	10:30 AM	92507	F80.4	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>
<input type="checkbox"/>	2/09/2023	Preschool			2:00 PM	2:30 PM	92507	F80.4	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>
<input type="checkbox"/>	2/10/2023	Preschool			12:30 PM	1:00 PM	92507	F80.4	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>
<input type="checkbox"/>	2/15/2023	Preschool			10:00 AM	10:30 AM	92507	F80.4	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>



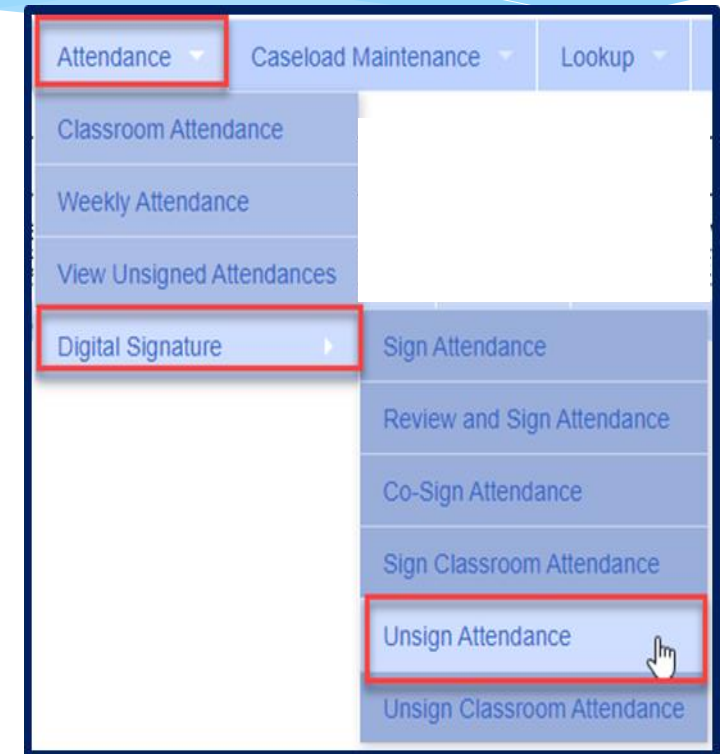


# **Un-signing Attendance & Making Corrections After Signed**



# Un-signing Attendance – Making Corrections After Attendance is Signed

- \* If after you reviewed and signed attesting that everything was accurate, a mistake is noticed, the process to correct is as follows:
  - \* If the entry is on a voucher to be billed (but hasn't been paid), it needs to be removed from the voucher.
  - \* You will un-sign your attendance, make correction, and resign your attendance.
- \* Teachers will also need to un-sign their attendance to make a correction, but they will choose “*Unsign Classroom Attendance*”.
- \* Go to **Attendance -> Digital Signature -> Unsign Attendance**





# Un-signing Attendance

From Date:  To Date:  Enrollment:  County:  Provider:

<input type="checkbox"/>	Last Name	First Name	Service Date	Start Time	End Time	CPT Codes	Notes
<input type="checkbox"/>			2/01/2022	10:00 AM	10:30 AM	97530	Devin engaged in fine motor activities. He was positioned to work on the floor to engage core working in tall kneel and quad coordination. He was building his own structures not replicating designs or patterns. He was more accepting of therapist work.
<input type="checkbox"/>			2/01/2022	10:30 AM	11:00 AM	97530	Teo transitioned easily to the motor room. He engaged in a sensorimotor obstacle course incorporating climbing and sliding. table for a sensory experience while using magnet blocks working on hand strength and bilateral hand coordination. Teo enjoyed

- \* Use Filter to search for attendances. You may need to change the date and filter back further for attendance.
- \* Click check box on rows to unsign.
- \* Click “Unsign Attendance”.
- \* Enter the reason (ex. entered wrong time).
- \* Enter your PIN.
- \* Click “I Agree” attesting that you previously verified signed but are inaccurate.

By entering my pin number, I/We certify that on the dates selected, the selected services, which I previously verified and signed, were not accurate, and must be changed in order to accurately reflect the services that took place for the specified children on the specified dates.

Reason for unsigning

Pin



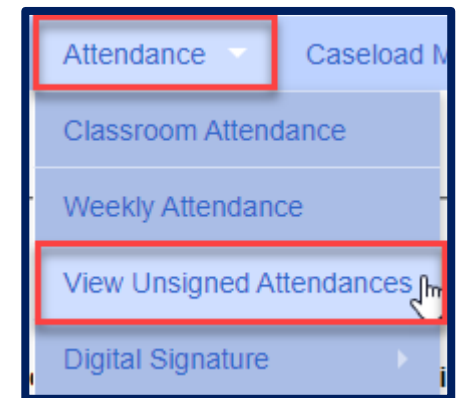


# Unsigned Attendances



# View Unsigned Attendance

- \* Go to **Attendance -> View Unsigned Attendances**
- \* This will give you a list of attendances that have been started but not completed.
- \* Incomplete attendances can be deleted from here.



Unsigned Attendances

Enrollment Type (All) Provider HOFFMAN, KRISTEN From Date 03/01/2020 To Date 03/31/2020 Search

Last Name	First Name	Service Date	Start Time	End Time	Attendance Type	Enrollment Type	RS Type	Service Provider	ESID	
AYERS	ISABELL	3/18/2020	11:00 AM	11:15 AM						Delete





# Printing Logs

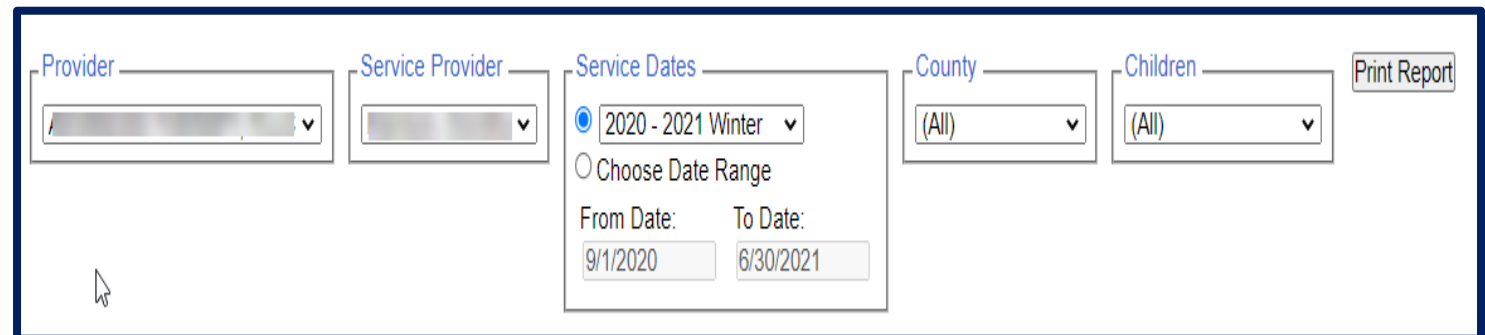


# Child Treatment Log

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

\* The filters will allow you to specify criteria for the report:

- \* Select Service Provider
- \* Select Service Dates
- \* Select County
- \* Select Child(ren)

A screenshot of the filter form for the Child Treatment Log. It includes dropdown menus for 'Provider', 'Service Provider', 'County', and 'Children'. The 'Service Dates' section has a radio button selected for '2020 - 2021 Winter' and an option to 'Choose Date Range' with 'From Date' (9/1/2020) and 'To Date' (6/30/2021) input fields. A 'Print Report' button is located on the right.



# Child Treatment Log



## PORTAL

### Child Treatment Log

Printed: 5/28/2021 8:25:51 AM

Page 1 of 2

09/01/2020 - 06/30/2021

ESID: CBR2021W Occupational Therapy- Individual

Child: C

Date of Birth: E

Therapist: Do

Date / Time	Setting	ICD/CPT Codes	Notes	
04/16/21 In: 10:05AM Out: 10:35AM	Universal Pre-K Classroom	F82 97530x2	Student engaged in fine motor tabletop task tracing three various shapes, triangle, circle and square with modified tripod grasp and 1 vc to stay on boundary line while tracing to increase coordination followed by coloring each shape according to color chart with minimal whole space when coloring and 1 vc to color within boundary lines.	Notes Entered: 5/4/2021 9:12:26 AM Notes Last Modified: 5/4/2021 9:12:26 AM  Signed: 5/4/2021 D OTA Cosigned: 5/5/2021 K MSOTR/L Meets Medicaid Requirements: Yes
05/04/21 In: 12:00PM Out: 12:30PM	Universal Pre-K Classroom	F82 97530x2	Student engaged in fine motor task tracing various shapes with right modified tripod grasp with 1 vc to stay on boundary lines when tracing followed by coloring each shape with 1 vc to slow down to increase motor coordination in right dominant hand. Composed first three letters in first name independently with visual model of rest of letters in first name due to difficulty with formation of letter y with directionality.	Notes Entered: 5/7/2021 11:00:51 AM Notes Last Modified: 5/7/2021 11:00:51 AM  Signed: 5/7/2021 D A Cosigned: NOT COSIGNED Meets Medicaid Requirements: Yes





# Parent Signature Logs



# Print Parent Signature Log

- \* Go to **Caseload Maintenance** -> **My Caseload**
- \* Choose the Enrollment needed, and click Generate Blank Signature Logs for Selected Enrollment.
- \* On Generate Parent/Guardian Signature Logs, choose month, and click Generate.



**My Caseload**

Filter By:  Search

Provider:  Session: 2020 - 2021 Winter

Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned		
<input checked="" type="checkbox"/>	CBF	3 C	2	COLUMBIA		Taconic Hills CSD	CBRS	04/12/21	06/24/21	OT 2x30 Individual	YES	Attendances	Defaults
<input type="checkbox"/>	CBF	3 J		COLUMBIA		KINDERHOOK CSD	CBRS	09/08/20	06/24/21	OT 2x30 Individual	YES	Attendances	Defaults

Excel Generate Blank Signature Logs for Selected Enrollments

**Generate Parent/Guardian Signature Logs**

Choose one of the following options for log generation:

☐ Don't specify month

☒ One for each month

☐ These Months:

Month
<input type="checkbox"/> Sep 20
<input type="checkbox"/> Oct 20
<input type="checkbox"/> Nov 20
<input type="checkbox"/> Dec 20
<input type="checkbox"/> Jan 21
<input type="checkbox"/> Feb 21
<input type="checkbox"/> Mar 21
<input type="checkbox"/> Apr 21
<input type="checkbox"/> May 21
<input type="checkbox"/> Jun 21

Generate









# Reports



# View Caseload – For Service Providers

- \* Are you a Service Provider working for an agency, and can't find one of your students?
- \* Go to **Caseload Maintenance -> My Caseload**
- \* If the child is not listed, contact the administrator of your agency and ask them to assign the child to you.





# View Caseload

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

My Caseload													
Filter By													
Provider: G TY Session: 2021 - 2022 Winter Search													
	Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned	
<input type="checkbox"/>		RS2122W0016895	BOYKIN	MATTIE	SCHENECTADY		Schenectady	RS	01/20/22	06/24/22	ST 2x30 Individual		Attendances Defaults
<input type="checkbox"/>		RS2122W0016896	BOYKIN	MATTIE	SCHENECTADY		Schenectady	RS	01/20/22	06/24/22	ST1 1x30 Group		Attendances Defaults
<input type="checkbox"/>		RS2122W0016596	BROUSSARD	DENVER	SCHENECTADY		Schenectady	RS	09/07/21	01/04/22	ST 2x30 Individual		Attendances Defaults
<input type="checkbox"/>		RS2122W0016597	BROUSSARD	DENVER	SCHENECTADY		Schenectady	RS	09/07/21	01/04/22	ST1 1x30 Group		Attendances Defaults
<input type="checkbox"/>		RS2122W0016884	BROUSSARD	DENVER	SCHENECTADY		Schenectady	RS	01/05/22	06/24/22	ST 1x30 Individual		Attendances Defaults
<input type="checkbox"/>		RS2122W0016885	BROUSSARD	DENVER	SCHENECTADY		Schenectady	RS	01/05/22	06/24/22	ST1 2x30 Group		Attendances Defaults



# View Caseload

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

## Attendance List

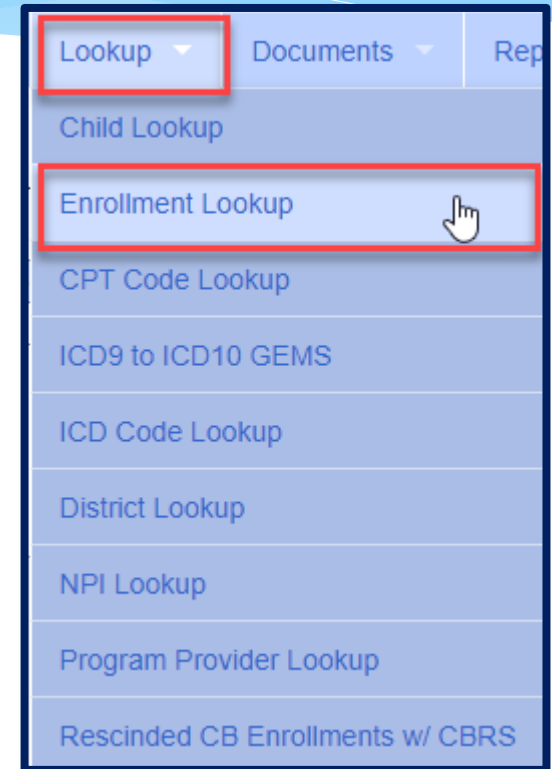
**Child Name:** FOSTER, ERNEST   **County:** SCHENECTADY   **Provider:**   **District:** SCHALMONT CSD  
**ESID:** RS2122W0016888   **From/To:** 1/10/2022-6/24/2022   **Service:** RS-ST (IND)   **Frequency:** 1x30

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



# Enrollment Lookup – For Agency Staff or Independent Providers

- \* You can search for enrollments to find all students that have been assigned to your agency. You can also see all attendances that you have entered on the enrollment.
- \* If a child is not listed, then contact the district.
- \* Go to **Lookup -> Enrollment Lookup**





# Enrollment Lookup

- \* Filter the School Year Session, County, and what enrollment type you are looking for.
- \* Click on Attendances to see all attendances entered on the enrollment.

**Enrollments**

School Year Session  County  ☐ CBRS ☒ RS ☐ SEIT ☐ CB

Provider

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	RS2122W0016895	BOYKIN	MATTIE	12/6/2016	SCHENECTADY	Y	Schenectady	RS	ST	1/20/2022	6/24/2022	2x30	I	9200-2		51.50	0.00	21	23	42	Attendances
	RS2122W0016896	BOYKIN	MATTIE	12/6/2016	SCHENECTADY	Y	Schenectady	RS	ST1	1/20/2022	6/24/2022	1x30	G	9200-2		51.50	0.00	21	23	21	Attendances
	RS2122W0016596	BROUSSARD	DENVER	3/5/2017	SCHENECTADY	Y	Schenectady	RS	ST	9/7/2021	1/4/2022	2x30	I	9200-2		51.50	30.00	16	18	32	Attendances
	RS2122W0016597	BROUSSARD	DENVER	3/5/2017	SCHENECTADY	Y	Schenectady	RS	ST1	9/7/2021	1/4/2022	1x30	G	9200-2		51.50	14.00	16	18	16	Attendances
	RS2122W0016884	BROUSSARD	DENVER	3/5/2017	SCHENECTADY	Y	Schenectady	RS	ST	1/5/2022	6/24/2022	1x30	I	9200-2		51.50	0.00	24	25	24	Attendances
	RS2122W0016885	BROUSSARD	DENVER	3/5/2017	SCHENECTADY	Y	Schenectady	RS	ST1	1/5/2022	6/24/2022	2x30	G	9200-2		51.50	0.00	24	25	48	Attendances
	RS2122W0016811	DELATORRE	CARINA	8/14/2017	SCHENECTADY	Y	SCHALMONT CSD	RS	ST	11/29/2021	6/24/2022	2x30	I	9200-2		51.50	8.00	28	30	56	Attendances
	RS2122W0016554	DUFF	TOD	1/18/2018	SCHENECTADY	Y	ROTTERDAM-MOHONASEN CSD	RS	ST	9/7/2021	6/24/2022	2x30	I	9200-2		51.50	20.00	40	42	80	Attendances



# Enrollment Lookup – Attendance List

- \* This will also show if the attendances have been billed, and what Voucher # they have been billed on.
- \* Click on Treatment Log to see the actual session note.

## Attendance List

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

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



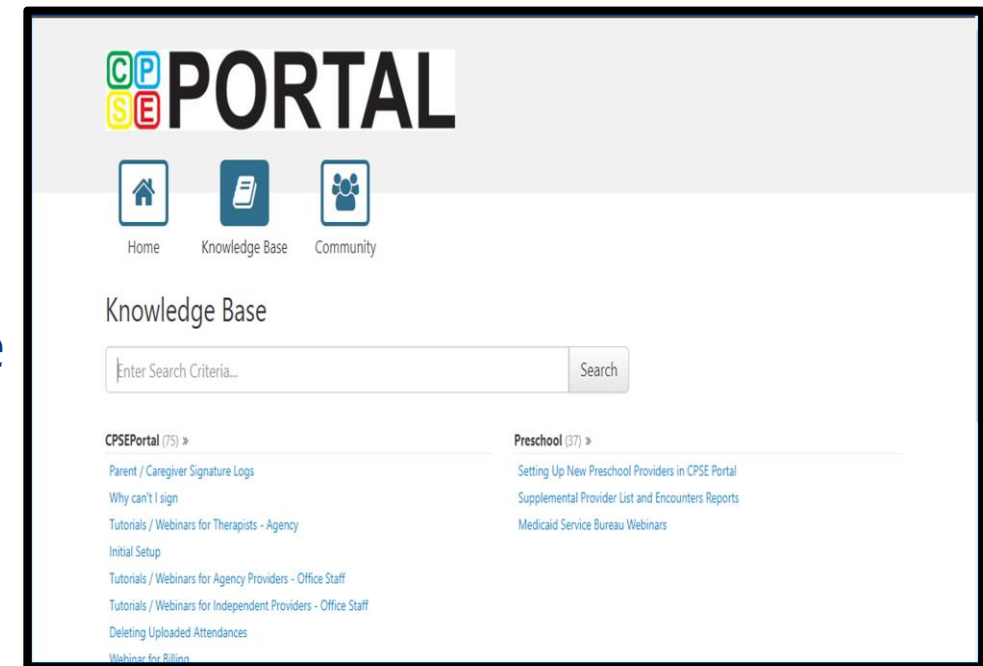


# Closing



# Portal Training – Knowledge Base

- \* The Knowledge Base provides numerous articles, trainings, webinars and other pertinent information that will help answer your questions before having to contact Portal support.
- \* You can simply click the Knowledge Base tab in the Portal or you can go to:
- \* <http://support.cpseportal.com/kb>





# Knowledge Base Articles

- \* **Entering Weekly Attendance**

- \* <http://support.cpseportal.com/kb/a38/entering-weekly-attendance.aspx>

- \* **Review and Sign Attendance**

- \* <http://support.cpseportal.com/kb/a148/review-and-sign-attendance.aspx?KBSearchID=16970>

- \* **Child Treatment Log**

- \* <http://support.cpseportal.com/kb/a28/child-treatment-log.aspx?KBSearchID=16959>

- \* **Parent/Caregiver Signature Logs (blank logs for counties)**

- \* <http://support.cpseportal.com/kb/a69/parent-caregiver-signature-logs.aspx?KBSearchID=16964>

- \* **Therapist Activity Report**

- \* <http://support.cpseportal.com/kb/a27/therapist-activity.aspx?KBSearchID=16966>



# Closing Remarks

- \* CPSE Portal Address (you may want to bookmark):  
<https://www.cpseportal.com>
- \* In addition to the Portal Knowledge Base, our Helpdesk is available through email at [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
  - \* When sending an email:
    - \* Do **not** use child's name
    - \* Use ESID #, Child # or STAC ID #
    - \* Include your county, and info needed