

JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

**MCGUINNESS CPSE PORTAL
Review and Sign Guide for Providers**

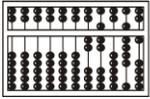
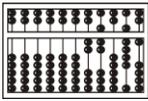


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CPSE Portal Support: Support@cpseportal.com
 CPSE Portal Knowledge Base: Support@cpseportal.com/Main/



REVIEW AND SIGN ATTENDANCE USER PROFILE & CREDENTIALS

To sign attendances go to **Attendance -> Digital Signature -> Review and Sign Attendance**.

The first section on the Review and Sign page is the therapist's profile. If you see a Red **X** or a yellow  sign, you can click on either to obtain more information about what the issue is with the credentials.

In the screen shots below, the Red **X** indicates that the therapist's license is expired or the therapist doesn't have valid credentials for signing.

Profile

First Name: [Redacted] Last Name: [Redacted] NPI: 1447404389

Signing As: [Redacted], PT

Status	Profession Code	Description	Credential Type	#	State	From	To
X	PT	Licensed Physical Therapist	License	028891	NY	12/5/2006	8/31/2024

NYS Office of Professions Search

Missing Attestations: No Missing Attestations!

PIN Created

Unsigned Attendances

School Year Session: 2024 - 2025 Winter

Audit | By Week | By Enrollment

Status	Child	Date of Service	Time In	Time Out	
X	[Redacted]	6/2/2025	08:30	09:00	Edit

Either all of your credentials have issues, or you have no credentials associated with your account. Please review them for details.

Ok

Profile

First Name: [Redacted] Last Name: [Redacted] NPI: 1447404389

Signing As: [Redacted], PT

Status	Profession Code	Description	Credential Type	#	State	From	To
X	PT	Licensed Physical Therapist	License	028891	NY	12/5/2006	8/31/2024

NYS Office of Professions Search

Missing Attestations: No Missing Attestations!

PIN Created

Unsigned Attendances

School Year Session: 2024 - 2025 Winter

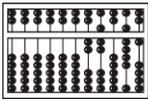
Audit | By Week | By Enrollment

Status	Child	Date of Service	Time In	Time Out	
X	[Redacted]	6/2/2025	08:30	09:00	Edit

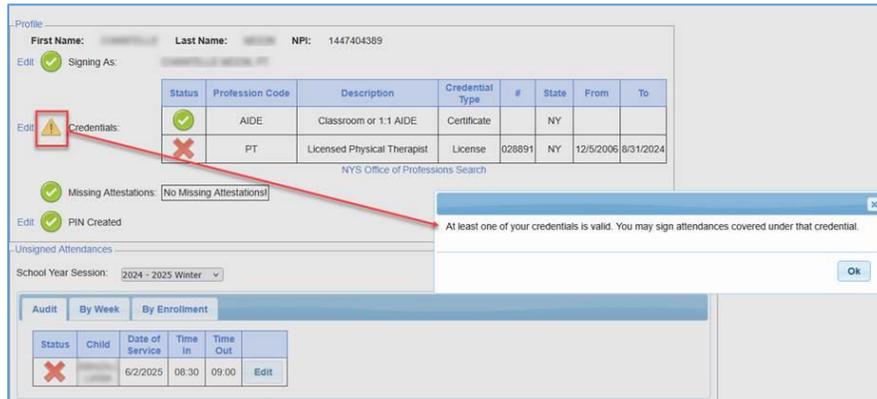
Issues Found With Credential:

Issue Type	Description	Data Causing Issue
ERROR	This license has expired	Expiration date for license: 08/31/2024

Ok



If there is a yellow  sign, then not all credentials are a problem.



Profile

First Name: [Redacted] Last Name: [Redacted] NPI: 1447404389

Signing As: [Redacted]

Status	Profession Code	Description	Credential Type	#	State	From	To
✓	AIDE	Classroom or 1:1 AIDE	Certificate		NY		
✗	PT	Licensed Physical Therapist	License	028891	NY	12/5/2006	6/31/2024

NYS Office of Professions Search

Missing Attestations: [No Missing Attestations]

PIN Created: [Checkmark]

Unsigned Attendances

School Year Session: 2024 - 2025 Winter

Status	Child	Date of Service	Time In	Time Out	Edit
✗	[Redacted]	6/2/2025	08:30	09:00	Edit

At least one of your credentials is valid. You may sign attendances covered under that credential.

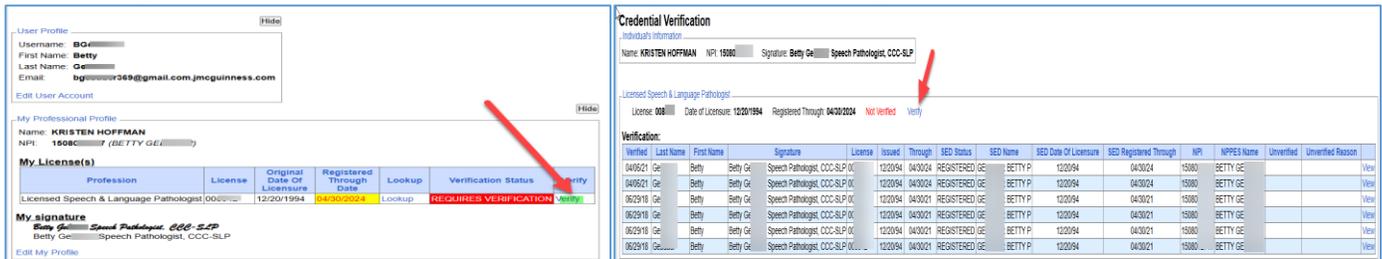
To update your credentials, you will go to **My Account -> My Profile**. Here you can update/edit license information, or add a new profession if needed. Below is a Knowledge Base article link on how to Update Credentials.

<https://support.cpseportal.com/kb/a340/updating-credentials.aspx?KBSearchID=35742>

As a reminder, if you are making changes to your credentials you will also need to re-verify your credentials if the County you work in requires it. To verify your credentials you will go to **My Account -> My Credential Verifications** or you can verify your credentials from your home page.

Home page:

My Account -> My Credential Verifications:



User Profile

Username: [Redacted]
First Name: Betty
Last Name: Ge
Email: bg@...@gmail.com

My Professional Profile

Name: KRISTEN HOFFMAN
NPI: 1508... (BETTY GE...)

Profession	License	Original Date of Licensure	Registered Through Date	Lookup	Verification Status	Verify
Licensed Speech & Language Pathologist	0002...	12/20/1994	04/30/2024	Lookup	REQUIRES VERIFICATION	Verify

My signature
Betty Ge... Speech Pathologist, CCC-SLP

Credential Verification

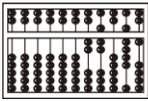
Individual's Information
Name: KRISTEN HOFFMAN NPI: 1508... Signature: Betty Ge... Speech Pathologist, CCC-SLP

Licensed Speech & Language Pathologist
License: 000... Date of Licensure: 12/20/1994 Registered Through: 04/30/2024 Not Verified Verify

Verified	Last Name	First Name	Signature	License	Issued	Through	SED Status	SED Name	SED Date of Licensure	SED Registered Through	NPI	NPPEE Name	Unverified	Unverified Reason
	Betty	Betty Ge	Speech Pathologist, CCC-SLP	0002...	12/20/94	04/30/24	REGISTERED	GE	BETTY P	12/20/94	04/30/24	15080	BETTY GE	Yes
	Betty	Betty Ge	Speech Pathologist, CCC-SLP	0002...	12/20/94	04/30/24	REGISTERED	GE	BETTY P	12/20/94	04/30/24	15080	BETTY GE	Yes
	Betty	Betty Ge	Speech Pathologist, CCC-SLP	0002...	12/20/94	04/30/21	REGISTERED	GE	BETTY P	12/20/94	04/30/21	15080	BETTY GE	Yes
	Betty	Betty Ge	Speech Pathologist, CCC-SLP	0002...	12/20/94	04/30/21	REGISTERED	GE	BETTY P	12/20/94	04/30/21	15080	BETTY GE	Yes
	Betty	Betty Ge	Speech Pathologist, CCC-SLP	0002...	12/20/94	04/30/21	REGISTERED	GE	BETTY P	12/20/94	04/30/21	15080	BETTY GE	Yes

Below is the Knowledge Base article link for Credential Verification.

<https://support.cpseportal.com/kb/a150/credential-verification-providers.aspx?KBSearchID=35743>



REVIEW AND SIGN AUDIT TAB

To search for a specific school year, click on the School Year Session, choose your school year in the drop down menu, and click *Apply Filter*. Remember to use the School Year Session filter if you are looking to sign previous attendances from a different school year.

Unsigned Attendances

School Year Session: (School Year Session) ▾

Apply Filter

Audit By Week By Enrollment

When your attendances populate, there will be three tabs (Audit, By Week & By Enrollment). The Audit tab will show any session notes that require reviewing and/or correcting before signing.

Red X Attendances:

1. Any attendance with a red “X” will need to be corrected, or you will not be able to sign the attendance.
2. Click on the red “X”, and the Issues Found With Attendance will populate to let you know what is wrong with the attendance.
3. In the example below, the session note is missing the CPT Code(s).
4. Click on the “Edit”, and the session note that needs to be corrected will populate.
5. Make the correction and save the note.
6. The error will then go away.

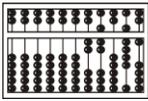
Audit By Week By Enrollment

Status	Child	Date of Service	Time In	Time Out	
X	ENGLISH WILFRED	2/8/2023	09:30	10:00	Edit
!	LACY, WILBERT	2/1/2023	10:00	10:30	Edit
!	LACY, WILBERT	2/2/2023	01:30	02:00	Edit
!	PERSON, LIBERTY	6/18/2020	01:00	01:30	Edit
X	TAM, CLIFTON	2/8/2023	12:30	01:00	Edit

Issues Found With Attendance:

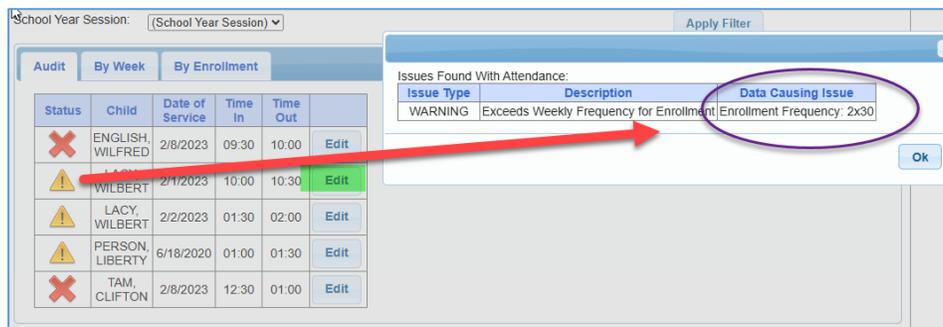
Issue Type	Description	Data Causing Issue
ERROR	Attendance is missing required field	CPT Codes: Missing

Ok



Yellow Yield Sign Attendances :

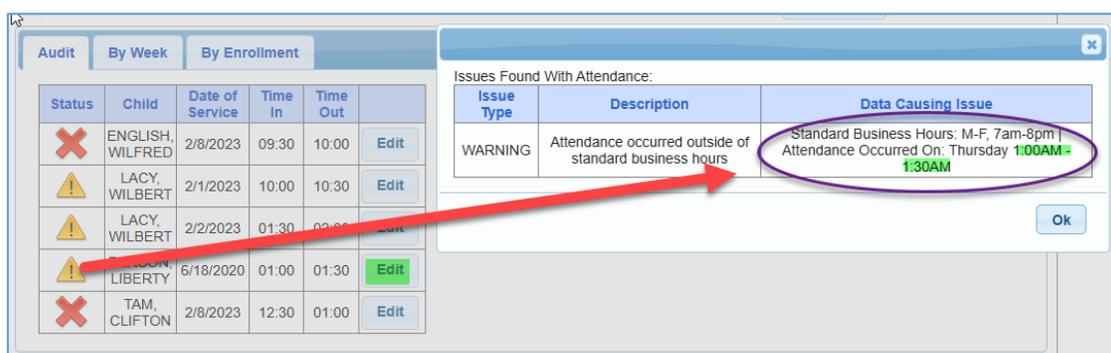
1. Any attendance with a  will need to be reviewed for accuracy before signing the attendance. **You must review the warning.** Do not bypass warning without reviewing.
2. Click on the , and the Issues Found With Attendance warning will populate to let you know what is possibly wrong with the attendance.
3. In the first example below, the attendance exceeds the enrollment frequency of 2x30. This may be due to a make-up session.
4. Click on the “Edit”, and the session note that needs to be reviewed will populate.
5. If the note is correct and you are over the frequency due to a make-up, then you can bypass this warning.
6. The  will remain when signing your notes.
7. If a correction is needed, then make the correction and save the note.
8. The warning note will then fall off of the Audit tab.



Status	Child	Date of Service	Time In	Time Out	
✖	ENGLISH, WILFRED	2/8/2023	09:30	10:00	Edit
⚠	LACY, WILBERT	2/1/2023	10:00	10:30	Edit
⚠	LACY, WILBERT	2/2/2023	01:30	02:00	Edit
⚠	PERSON, LIBERTY	6/18/2020	01:00	01:30	Edit
✖	TAM, CLIFTON	2/8/2023	12:30	01:00	Edit

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

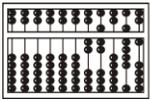
1. In the second example, you can see that the therapist entered the note with a time of 1:00AM-1:30AM, which is outside of standard business hours.
2. In this example, you will want to Edit the note and correct the time of the session to PM.
3. This note will fall off of the Audit tab as it has now been corrected.
4. **Always** review the warning, and do not just bypass.



Status	Child	Date of Service	Time In	Time Out	
✖	ENGLISH, WILFRED	2/8/2023	09:30	10:00	Edit
⚠	LACY, WILBERT	2/1/2023	10:00	10:30	Edit
⚠	LACY, WILBERT	2/2/2023	01:30	02:00	Edit
⚠	PERSON, LIBERTY	6/18/2020	01:00	01:30	Edit
✖	TAM, CLIFTON	2/8/2023	12:30	01:00	Edit

Issue Type	Description	Data Causing Issue
WARNING	Attendance occurred outside of standard business hours	Standard Business Hours: M-F, 7am-8pm Attendance Occurred On: Thursday 1:00AM-1:30AM

You can digitally sign attendances once all attendances have been reviewed and/or corrected.



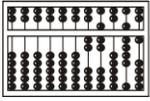
REVIEWING ATTENDANCE WARNINGS

ATTENDANCE WARNINGS WITH YELLOW YIELD SIGN :

Below is a list of warnings that will need to be reviewed and possibly corrected before signing notes.

DO NOT BYPASS WARNINGS. Each warning should be reviewed for correctness.

1. Attendance service date is outside the enrollment dates.
 - a. Warning must be corrected.
 - b. Review the start and end dates of the enrollment. Your attendance is outside of these dates. Review the IEP. If the enrollment dates are wrong, contact the district if they use eSTACs, or contact the county if they do not.
2. Enrollment for attendance has been rescinded by the county.
 - a. Warning must be corrected.
 - b. Either the school district or the county has rescinded the enrollment, and most likely they have created a new enrollment. Your attendances may need to be moved over to the new enrollment. Below is the link on *How to Move Attendances Between Enrollments*: <https://support.cpseportal.com/kb/a444/how-to-move-attendances-between-enrollments.aspx?KBSearchID=35692>
3. Attendance group size differs from the expected size of the CPT code listed.
 - a. Warning must be corrected.
 - b. Review the # of children in the group size and the CPT code that was entered on the session note.
 - c. If there are 2 or more children in the group, you will need to use a group CPT code. If there is one 1 child in the group, then you need to use a group CPT code for a group of 1 or use an individual CPT code.
4. Attendance occurred outside of standard business hours.
 - a. This warning can be bypassed if correct.
 - b. Review the time of the session note to ensure the proper start & end time was entered on session note, this includes AM vs. PM.



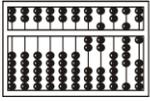
5. Attendance duration differs from the expected time of the CPT codes on attendance.
 - a. Warning must be corrected.
 - b. The CPT code(s) entered on the session note are more or less than the duration of the session. (Ex. – Session is for 30 minutes, but therapist entered 3 units of timed CPT codes, and should have only entered 2 units.)

6. Overlapping Attendance for Therapist.
 - a. Warning must be corrected.
 - b. Therapist entered 2 session notes that have overlapping times. Correct child with the wrong start/end time.

7. Overlapping Attendance for Child.
 - a. This warning can be bypassed if correct.
 - b. A child with a co-treat will have overlapping attendances.
 - c. If attendance is not a co-treat, review the name of the therapist that you are overlapping attendances with.

8. Exceeds Weekly Frequency for Enrollment.
 - a. This warning can be bypassed if correct.
 - b. If enrollment is for 2x30, why is there a third session? Is this session note correct? Is the third session a make-up? Then make sure that the third session is marked as a make-up session with a make-up for date.

9. Session duration is less than enrollment duration.
 - a. This warning can be bypassed if correct.
 - b. Review note for accuracy of duration. If enrollment is for 30 minutes, but session note is for 20 minutes is this correct? Did you service the child for only 20 minutes?



REVIEWING ATTENDANCE ERRORS

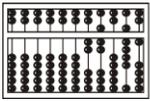
ATTENDANCE ERRORS WITH A RED “X”:

Below is a list of errors that **MUST** be corrected, before you can sign your attendance.

You will click on the red **X**, and the issues found with the attendance will populate.

You will then click on the Edit button, and the session note for that attendance will populate. Now make needed correction.

1. Attendance is missing required field.
 - a. Some examples are: missing CPT code(s), missing ICD code(s), missing session note.
2. Attendance is marked as a makeup, but has no makeup date.
 - a. Edit session note, and next to the *Entry Type* of Make Up Session, enter a date under *Make Up For*.
3. Attendance group size differs from the expected size of the CPT code listed (Marked as Meets Medicaid).
 - a. Edit session note to review how many children in group, and CPT code used.
 - b. A group of 1 will require a CPT code for a group of 1 or an individual CPT code.
 - c. A group of 2 or more will require a group CPT code.
4. Valid credentials for service are not on file.
 - a. Review your credentials on your Portal account. Go to **My Account -> My Profile**.
 - b. If you were a CFY and are now an SLP, **DO NOT** remove your CFY credentials.
 - c. If you were an OTA or PTA and are now a OT or PT, **DO NOT** remove your OTA or PTA credentials.
5. Medicaid eligible attendance does not contain a billable ICD code.
 - a. Check the ICD code that was entered on the session note.
 - b. You can go to **Lookup -> ICD Code Lookup**, enter the ICD code and check to see if this is a viable code.



6. Session Note must have the setting indicated.
 - a. Session notes must include the setting of the service.
 - b. Edit the note and under the “Setting” field, choose the proper setting.
 - c. You should also create Defaults for your caseload. Here is a link on how to create Defaults: <https://support.cpseportal.com/kb/a243/setting-up-defaults-in-your-caseload.aspx?KBSearchID=35706>. This will ensure that every session note contains an ICD code, CPT code, Setting & Location.

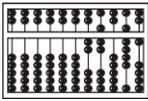
7. Session Note must have the location indicated.
 - a. The location of your session must be defined under the location dropdown.
 - i. Where did this session occur?
 - ii. If the session setting was Preschool, then under the location enter the name & address of the preschool.
 - iii. If the session setting was home, then under the location enter the address of the child.
 - iv. If the session setting was community, then under the location enter the name of the place & the address (example: Town Library & address).
 - b. You should also create Defaults for your caseload. Here is a link on how to create Defaults: <https://support.cpseportal.com/kb/a243/setting-up-defaults-in-your-caseload.aspx?KBSearchID=35706>. This will ensure that every session note contains an ICD code, CPT code, Setting & Location.

8. NOICD/NODIAG code combined with other diagnosis.
 - a. You cannot combine NOICD with other ICD codes.
 - b. If this is a missed treatment, then there should only be NOICD.
 - c. If this is a provided treatment, then there should not be NOICD listed on the note.

9. NOCPT code combined with other code.
 - a. You cannot combine NOCPT with other CPT codes.
 - b. If this is a missed treatment, then there should only be NOCPT.
 - c. If this is a provided treatment, then there should not be NOCPT listed on the note.

10. Untimed CPT code combined with timed CPT code.
 - a. You cannot combine NOCPT with timed CPT codes.
 - b. If this is a missed treatment, then there should only be NOCPT.
 - c. If this is a provided treatment, then there should not be NOCPT listed on the note.

11. Session duration is less than the expected time of the CPT codes on attendance.
 - a. Your CPT codes should match the duration of your session.
 - b. For OT & PT if your session is a ½ hour, then you should have 2 units of one CPT code or 2 CPT codes each with 1 unit. If this was a 45 minute session, then you would need 3 units total.



REVIEW AND SIGN BY WEEK OR BY ENROLLMENT

REVIEW AND SIGN BY WEEK:

To search for a specific school year, click on the School Year Session, choose your school year in the drop down menu, and click *Apply Filter*.

Unsigned Attendances

School Year Session: (School Year Session)

You can sign your attendances under the By Week tab by clicking on Review And Sign.

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
01/29/2023	02/04/2023	23	Review And Sign
02/05/2023	02/11/2023	28	Review And Sign
02/12/2023	02/18/2023	2	Review And Sign

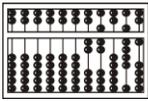
This will pull up all of the attendance(s) for the week, and will show you what day the attendances are on and how many. Check what attendances you want to sign and click *Sign*.

Unsigned Attendances

Showing Attendances for the week of: 1/29/2023 - 2/4/2023

Sunday (0) Monday (0) Tuesday (0) **Wednesday (10)** Thursday (9) **Friday (4)** Saturday (0)

	Status	Child Name	ESID	Service Type	Session Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes	
<input type="checkbox"/>	DIGITALLY SIGNED	CROWDER, DENIS	RS2223W0017744	ST	02/03/23	09:10 AM	09:40 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 checked="" type="checkbox"/>	✓	DE LUCA, HAROLD	RS2223W0017744	ST	02/03/23	10:05 AM	10:35 AM	30	1.00	30	30	92507 (x1)	F80.0, 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="button" value="Edit"/>
<input checked="" type="checkbox"/>	✓	JACOBSEN, OTTO	RS2223W0017755	ST1	02/03/23	12:30 PM	01:00 PM	30	1.00	30	30	92506 (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="button" value="Edit"/>
<input checked="" type="checkbox"/>	✓	MICHAELS, KARAN	RS2223W0017946	ST1	02/03/23	12:30 PM	01:00 PM	30	1.00	30	30	92506 (x1)	F80.0, 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="button" value="Edit"/>
<input checked="" type="checkbox"/>	✓	TAM, CLIFTON	RS2223W0017935	ST1	02/03/23	12:30 PM	01:00 PM	30	1.00	30	30	92506 (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="button" value="Edit"/>



REVIEW AND SIGN BY ENROLLMENT:

You can sign also your attendances under the By Enrollment tab.

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
COON, SUNSHINE	RS2223W0018072	February 2023	ST1	2	Review And Sign
CROWDER, DENIS	RS2223W0017517	February 2023	ST	1	Review And Sign
DAVILA, FOSTER	RS1920W0014800	October 2019	COR	1	Review And Sign
DUFF, TOD	RS2223W0017979	February 2023	ST1	2	Review And Sign
DUFF, TOD	RS2223W0017980	February 2023	ST	1	Review And Sign

This will pull up all of the attendance(s) for the specific enrollment selected. A calendar will populate with the child's name & enrollment information, along with the highlighted dates that need to be signed. Check what attendances you want to sign and click *Sign Attendance*.

Enrollment Info

Child Name: COON, SUNSHINE ESID: RS2223W0018072
 Service Type: Speech Therapy Group GRP Frequency: 2x30
 Dates: 02/06/23 - 06/23/23 Status: OK

February 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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	1	2	3	4
5	6	7	8	9	10	11

Sign Attendance

Status	Service Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes	Edit
<input checked="" type="checkbox"/>	02/06/23	01:25 PM	01:55 PM	30	1.00	30	30	92508 (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.	Edit
<input checked="" type="checkbox"/>	02/08/23	12:30 PM	01:00 PM	30	1.00	30	30	92508 (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.	Edit