

CPSE Portal Session Notes

June 9, 2025

Questions & Answers

Topic/Category	
Parent Signature Logs	
Q	Is the Parent Signature Log now required for Orange County CBRs?
A	NO. The Parent Signature Log is only needed for Related Services (fee for services) and SEIT.
Q	Is the county the child is from or where the program is listed on the Parent Signature Log?
A	The name of the county is listed on the form. The program is not listed on the form since the form is not needed for Center Based children.
Q	Is Orange County expecting a signed sheet at the end of each month for each school-based student?
A	The Portal is for Preschool children only. If the child is in a Center Based program then you do not need a Parent Signature Log. If the child is receiving SEIT or Related Services (fee for services), then the Parent Signature Log needs to be sent to Orange County along with the monthly billing.
Q	Does a related service student who is seen in a program setting no longer needs a signature page?
A	If the service is a Related Service or fee for service, then the Parent Signature Log is required.
Q	Just to clarify, is a signed sheet for the therapy log expected if a student is receiving speech, and therefore required for all students on the caseload at a Center Based program? Or does it differentiate from those have an IEP or are considered RSO?
A	If the service is a Related Service or fee for service, then the Parent Signature Log is required. Deciding when to use a Parent Signature Log is not based on where the child receives their service(s). If the child is a Center Based student with Center Based Related Services, then no log is needed. If the child is SEIT or Related Services (fee for services), then a log is needed.
Q	On the signature log form there is a column for session code. Do they just indicate for missed and makeups? Do they have to put a P for service provided or is it understood since there is a signature?
A	There is a column for codes, and the description of the code is at the bottom: <u>Service Codes: P-Service Provided, CA-Child Absent, TA-Teacher Absent, MU-Makeup</u>

CLASSROOM ATTENDANCE

Q Is attendance needed for non Center Based programs?

A **NO.** Non Center Based children are receiving Related Services or SEIT, and they will enter session notes.

Q In lieu of digital signatures, can teacher sign a paper log?

A If the Center Based teacher is taking attendance in another system, then they can send the agency billing admin their paper attendance. The billing admin can then enter and sign the classroom attendances.

SESSION NOTES

Q If the student is unavailable due to field trip or another reason, should we put child absent.

A **Yes.** You will put child absent on field trip in the body of the session note.

Q How do you enter goals to automatically show when you write your note?

A Go to **Caseload Maintenance -> My Caseload** and click on Defaults. You will need to type out the goals in your Defaults in the Enrollment Notes box. The goals will then populate onto each of your future session notes, and you can adjust your goals accordingly to the session.

Q If the code is R62.5 on the script, we can enter R62.50 into the portal without having a Dr. update the code since it's in the family?

A **YES,** that is correct.

Q If a child is out M-Th and they have 2x week mandate, you are saying it is ok to see them twice on Friday? Whether back to back or not?

A **YES.** If they are back-to-back, make sure to enter them as 2 separate sessions.

Q For SEIT, do we need to enter session notes/treatment logs and obtain signature from school?

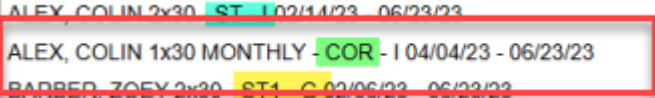
A **YES.** SEIT providers will enter session notes into the Portal, and obtain a signature on the Parent Signature Log for your service.

Q In lieu of digital signatures, can a SEIT teacher sign a paper log?

A **NO.** If you are a SEIT teacher providing SEIT services, then all notes must be entered into the Portal.

Q Can you start the session note during the treatment of the student?

A **NO.** The time with the child should not include the therapist entering notes or doing paperwork.

Q	For location, if the services are provided at the home what do we put for location?
A	You can enter Home or the child's physical address.
Q	A program can take children from multiple counties and they can all be grouped together in the same class -- what then?
A	You will still enter your group notes as shown in the webinar slides. Each agency can only bill for the children in their respective counties.
Q	What about a related service provider who is assigned as the Coordinator of Services when there is no SEIT yet there are two related services?
A	When entering the session note, you will select the ESID that contains COR as shown below. 
Q	Sometimes speech does service coordination also. Do we follow SEIT rules? Is this Medicaid billable?
A	You will enter a session note for service coordination and select the enrollment of COR as noted in the screen shot above. This service is not Medicaid billable. You do not need to check the check box for "Does Not Meet Medicaid Requirements" as we will not bill Medicaid for this service.
Q	I thought you always had to comment on the same IEP goals since they don't change but the "note" about the child's progress does change. So wouldn't the same goals always be on the note but the progress changes?
A	If you enter goals through the defaults, when you enter your session note you may need to adjust those goals accordingly. You may have 5 goals but did not work on all 5 goals today. So you will need to adjust those goals on the session note to what you are working on for that specific service.
Q	Currently, if I see back to back preschool students, I will set their time 1 minute apart (12:00-12:30pm & 12:31-1:01) - should I stop noting the time this way?
A	You can enter as 12-12:30 & 12:30-1.
Q	Will the co visit option alert the supervisor that they need to sign on it? If so, then every session for a CFY, COTA, or PTA would need to be clicked off as co visit. Correct?
A	NO. There is not an alert, and only face to face visits should be checked off as a co-visit, not all sessions.
Q	Can I set the ICD & the CPT codes to a default for a particular student?
A	YES. Each student must have their own defaults entered, as each will be different.

Q	Once the goals are added will they show up as a default for that particular student in subsequent session notes?
A	YES.
Q	Will the Weekly Calendar show all children scheduled for that day before the session notes are actually entered?
A	NO. As you enter the session notes, they will populate to your Weekly Calendar.
Q	If we have a true makeup such as the previous week, is that billable?
A	NO.
Q	Can you switch time slots depending on the child's availability at any given time?
A	YES. You will simply click into a different time slot.
Q	Is the back to back session procedure the same for doing a regular session followed by a makeup session? Is this also the same procedure for SEIT?
A	YES. This is the same procedure for SEIT also.
Q	In Orange County, we have to put P for child or T for provider with the missed session reason. Do we have to do that now?
A	NO. You will choose the Missed Treatment Session, and in the body of the session note you will enter that the therapist was absent or the child was absent. If you know the reason why the child was absent, you can also enter the reason.
Q	Can the defaults be added by an admin or only the providers?
A	Billing admins can set defaults, but you should not be selecting the ICD & CPT Codes that the therapist will use.
GROUP ATTENDANCES	
Q	Can you please review what we should put if there is a child absent during a group session?
A	You will choose a Missed Treatment Session for the absent child with NOICD & NOCPT. The Not Medicaid Billable box will also be checked off for you. This child will not be part of your group since they are absent. If this is a group of 2, then one child is absent, and the other child is a group of 1.
Q	If you have a child with a group service and no other children to group with, can you have another child from a class make-up the group who does not receive services?
A	You should only be grouping children with an IEP that states group services. If your student does not have another child to group with, then contact the district to see if they can change the child's service to an individual service until there becomes another student to group with.

	MAKE-UPS
Q	Doesn't a make-up need to be done in the same week?
A	<p>When there is a missed session, the make-up can be completed within another week.</p> <ul style="list-style-type: none"> • Example: If the enrollment is 2x30: You see the child on Monday & Thursday, and the child is absent on Monday and now you see the child on Wednesday & Thursday. Wednesday is not a make-up, because the enrollment is for 2x30, and you saw the child twice that week which matches the IEP. • Example: If the enrollment is 2x30: You see the child on Monday & Thursday, and child is absent on Monday and you can only see the child on Thursday, then you are only seeing the child 1x30 this week. Therefore, next week you can see the child 3x30, and mark one of those sessions as a make-up for the prior week. You will receive a warning when signing your sessions stating that you are exceeding the enrollment sessions. As long as your note is marked as a make-up, and Not Medicaid Billable, you can sign your notes.
Q	If you do a make up in the same week, can you just delete the missed session and put in the 2 nd session? Also, why do make-up's another week if not billable?
A	If you want to delete the missed session from the current week you can but it will not be entered as a make-up. Also, IDEA (Individuals with Disabilities Act) states the following: "If a therapist is absent or the district is responsible for a missed session, they are generally expected to make up the time to ensure the student's progress toward their IEP goals." You can also check with your county if they require make-ups.
Q	What if you're making up a session the following week with 2 regular sessions then Friday for makeup for the previous week?
A	Then you will enter your 3 session notes. On Friday's session note you will choose Make-up Session and enter the missed date from the prior week. We will not bill Medicaid as the frequency is 2 and you have entered 3 sessions.
Q	When you are doing a makeup, is there an option to select the date you are making up from a prior missed session?
A	YES. When you choose Make-up session, the Make-up date box will populate for you to enter a date in.
	SIGNING / CO-SIGNING / UNSIGNING SESSION NOTES
Q	What happens if you enter times that overlap with another session. Will you get an error message?
A	YES. You will receive a yellow warning sign showing that you have 2 children that are overlapping. You will need to correct one or both students.
Q	How do you un-sign your session note to edit it?
A	The therapist will go to Attendance -> Digital Signature -> Unsign Attendance . Use the filter to search for what date and county.

Q	Is the supervisor to sign in 45 business days or calendar days?
A	45 calendar days.
Q	For co-signing notes - does the CFY have to sign first in order for the supervisor to see them and sign them?
A	YES.
Q	Do you need signature for missed session?
A	You should be signing your missed sessions. If you do not sign them, then those attendances may populate to a report that shows missing/unsigned attendances.
	MISCELLANEOUS
Q	Are SEIT services Medicaid-reimbursable?
A	NO. This is why the SEIT provider can enter NOICD & NOCPT codes on their session notes.
Q	Do you have to enter missed sessions for Holidays and school breaks?
A	Generally, you do not need to enter missed notes during the school breaks or holidays. You can confirm with your county should you need to enter holidays or breaks.
Q	Who should put this information in at the center-based program when there is no therapist hired?
A	There is no information or notes to be entered. If the agency has a service that they cannot perform, they should let the district know. No session notes will be entered on the ESID as there is no therapist assigned to the ESID. Once the agency hires a therapist, then that therapist can start to enter notes.
Q	If you have a missed session, does the NOICD and NOCPT code automatically default or do you need to add them to favorites first and then select them from drop down?
A	Those codes will populate for current notes. Not for future or past notes.
Q	I am an LMSW and Orange County does not bill Medicaid for the students on my caseload. In Kinney, I select "Other " for CPT code. Is that an option under the CPSE Portal?
A	If you are an LMSW, then your notes need to be co-signed by a LCSW. If you do not have a supervisor to co-sign your notes, then you will mark your notes as "Does Not Meet Medicaid Requirements". Psychological Counseling services are Medicaid billable.
Q	Do we need to keep a copy of session notes or is it sufficient to have them on McGuiness in case of audit?

A	You do not need to keep a copy of the notes unless you want to. McGuinness will always assist the county during an audit and provide the necessary documentation needed.
Q	For eSTACs, once a district submits it how long before we can view the child?
A	Most counties send the information to the Portal within a day or two.
Q	Up until now therapists also needed to submit attendance to the county. Has this changed?
A	The therapist will not be submitting anything to the county. The billing admin will submit certain documents, which will be covered under the billing webinar.
Q	When an SLP does an initial session in order to write a script, is that session Medicaid billable?
A	YES.
Q	Our Center Based program currently completes session notes in Frontline and notes are then extracted to Kinney. Is there a process for this to happen with CPSE Portal?
A	Any agencies that use an outside system for tracking their sessions, your software vendor creates an XML file following our Schema and uploads the data to the Portal.