

QUICK REFERENCE GUIDE

Digital Speech Recommendations – Portal

(Digital Speech Recommendations are “required” for all Full-Service Medicaid Counties - Effective 7/1/22)

When to Create the Digital Recommendation

Digital Recommendations should be created by the SLP to coincide with the child’s ***initial**** session. If the digital recommendation is not created on the same date as the child’s initial session, each session without the digital order must be marked on the session note as, “Not Medicaid Eligible.”

(*If the SLP has seen the child previously or completed the evaluation, the digital recommendation can be completed sooner than the initial session.)

Unmatched Enrollments

Unmatched records must be created by the agency – service providers do not have access to the menus in the Portal to create unmatched records.

Important Note:

Just prior to the start of each school session, the agency should be checking the ***Enrollments Uploaded by County Report*** (on the ***Reports Menu*** in the Portal) to determine which speech enrollments require an unmatched enrollment. The agency should create these unmatched enrollments prior to the first date of the session so the SLP can create a digital recommendation on the date of the first session with the child.

The SLP should ***not*** create a digital recommendation from the ***Create New Order*** menu if there is no enrollment. If the child does not appear in the Prescription for Caseload grid, there is no enrollment for the child (Unmatched or Official).

If the SLP creates a digital recommendation without an unmatched enrollment, the digital recommendation will not be attached to any enrollment.



A screenshot of the Portal's 'County Added Enrollments' report. The report displays a table with columns for County, Provider, Child, School Year, From Date, To Date, Enrollment Type, Service Type, SMI, Frequency, Date Added, Attendance, and View. The data shows multiple enrollments for various children across different school years and dates. The report is titled 'County Added Enrollments' and includes a 'Print' button at the bottom.

County	Provider	Child	School Year	From Date	To Date	Enrollment Type	Service Type	SMI	Frequency	Date Added	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	10/2/2022	10/5/2022	RS	ST	RS2223WY0196102	2x45	10/13/2022	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	10/5/2022	6/23/2023	RS	ST	RS2223WY0196103	2x30	10/13/2022	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	11/7/2022	6/23/2023	RS	OT	RS2223WY0196686	2x30	11/2/2022	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	9/6/2022	6/23/2023	RS	PMT	RS2223WY0196203	W/THLY	9/19/2022	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	9/6/2022	6/23/2023	RS	ST	RS2223WY0196204	2x30	9/19/2022	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	9/20/2022	6/23/2023	RS	ST	RS2223WY0196358	2x30	9/19/2022	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	1/30/2023	6/23/2023	RS	ST	RS2223WY0191916	2x30	1/6/2023	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	1/30/2023	6/23/2023	RS	ST	RS2223WY0191916	2x30	1/6/2023	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	1/30/2023	6/23/2023	RS	ST	RS2223WY0191916	2x30	1/6/2023	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	9/1/2022	6/23/2023	RS	OT	RS2223WY0191449	2x30	12/19/2022	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	9/1/2022	6/23/2023	RS	ST	RS2223WY0196321	2x30	7/1/2022	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	9/1/2022	6/23/2023	RS	ST	RS2223WY0196693	2x30	9/29/2022	Attendance	View
NASSAU	ALL ABOUT KIDS		202223 WYN	12/5/2022	6/23/2023	RS	ST	RS2223WY0191169	2x30	11/30/2022	Attendance	View

One-Time Set-Up

- For the **SLP**
 - If the SLP does not have a Portal profile or a PIN #, the SLP should go to: **My Account>My Profile** and enter the following information:
 - ✓ License # and current licensure dates
 - ✓ NPI #
 - ✓ Fill in the Signature including credentials (eg., MA CCC SLP)
- For the **Billing Provider**
 - If the Billing Provider information has not been completed, go to: **My Account>Billing Provider Profile**.
 - ✓ Fill in a complete address including phone number with area code.

How to Create the Unmatched Child/Enrollment

- First, search the Portal for the child to ensure that the child does not have a record in the Portal. If the child is not in the Portal, create an unmatched child. (Caseload Maintenance>**Unmatched Children**>Click Add Child)
- Create an Unmatched (CB, RS & SEIT) Enrollment (Caseload Maintenance>**Add/Edit Unmatched Enrollments**)
- Create unmatched Center-Based Related Service (CBRS) enrollments.
 - 1) First, create an unmatched **Center-Based (CB)** enrollment (*from the Add/Edit Unmatched Enrollments Screen*).
 - 2) Then, go to Caseload Maintenance>**CBRS Enrollments** to create the (CBRS) “included services” for the center-based enrollment.
 - 3) Link to Knowledge Base Articles:
 - Entering Unmatched Children and Unmatched Enrollments**
<http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx>
 - Entering Unmatched CBRS Enrollments**
<http://support.cpseportal.com/kb/a254/entering-unmatched-cbrs-enrollments.aspx>
 - Matching Unmatched Children & Enrollments**
<http://support.cpseportal.com/kb/a175/matching-unmatched-children-and-enrollments.aspx>

How to Create the Digital Recommendation

First, make sure the one-time set-up has been completed for:

- The SLP (My Account>My Profile), and
- The Billing Provider (My Account>Billing Provider Profile)

The digital recommendation can be **created** from the following screens:

- 1) Caseload Maintenance > **Prescriptions for Caseload** > Click the **Create Speech Recommendation Link** (*This link can be used for all prescriptions*)
- 2) Caseload Maintenance > **Create New Order** > Type in the child's name > Click Search > Click **Select**

- 3) Link to Knowledge Base Article: **Creating Digital Speech Recommendations (SLPs)**

<https://support.cpseportal.com/kb/a160/creating-digital-speech-recommendations-slps.aspx>

How do you check the status of the digital recommendation?

- **Therapists** will use the Caseload Maintenance>Prescriptions for Caseload screen (*Rx Status Column*)
- **Billing Admins** will use one of two screens:
 - 1) Lookup>Child Lookup, or
 - 2) Medicaid>Prescriptions>Prescription Entry Maintenance
 - Prescription Entries Tab
Will show you the status of the prescription in the "Status" Column.
 - Prescription Images Tab
The Description Column will have narrative that states, "Order File Created in CPSE Portal" if a digital recommendation was completed.

How to you **view or print** the digital recommendation?

- **Therapists** will click the **VIEW** link in the **Prescriptions for Caseload** grid.
Click on the printer icon at the top of the document or right click and select Print.
- **Billing Admins** will view or print by clicking the VIEW IMAGE link:
 - **Child Lookup**
Can view or print the prescription by clicking the "Manage" link in either grid.
 - **Prescription Entry Maintenance**
Can view or print the prescription by clicking the VIEW IMAGE link from the Prescription Entries Tab

Troubleshooting

I filled in all the fields to generate the Digital Speech Recommendation, but couldn't complete the process. Why?

Has the one-time set-up for both the billing provider and ordering providers been completed?

Did you enter the ICD Code? (This is a required field)

Did you click Preview and Sign to preview and digitally sign the order? Did you click "I Agree" and enter your 4-digit Pin #?

I completed my digital recommendation, but the completed recommendation is not loading.

You may need to allow "pop-ups" on your computer.