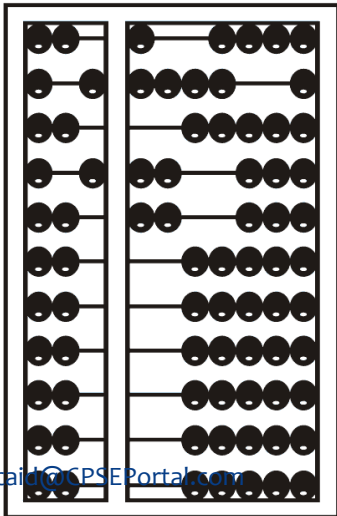


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Advanced Billing Webinar

Purpose Of Webinar

The purpose of today's webinar is to...

- ☐ Review some new features that will cause billing errors,
- ☐ Review some topics from previous webinars that cause billing errors,
- ☐ Review some work arounds for billing errors,
- ☐ To answer any questions that you may have regarding monthly billing issues,



Full-Service Medicaid Portal Changes

For help contact: Medicaid@CPSEPortal.com

Annual Provider Agreements/Statements of Re-assignment

- * Your county will notify you if this feature will be enabled in the Portal.
- * If the county opts-in, these documents must be signed in the Portal prior to billing being submitted.
- * The Annual Provider Agreement is for an agency or independent provider only!
 - * Please do not ask your clinicians to sign this agreement.
- * This document can be signed by going to **My Account -> Provider Annual Agreements.**

Generate Prescriptions

- * Agencies can now generate prescriptions from the Portal.
- * The prescriptions will match the services, frequency & duration that are entered into eSTACs by the district or county.
- * Go to **Medicaid -> Prescriptions -> Generate Prescriptions**
- * Link to Knowledge Base article: <https://support.cpseportal.com/kb/a873/generating-prescriptions-billing-admins.aspx>
- * Link to New OT/PT Prescription Template:
<https://support.cpseportal.com/kb/a347/medicaid-compliant-ot-pt-prescription-template.aspx?KBSearchID=44979>
- * Link to New Multi-Discipline Prescription Template:
<https://support.cpseportal.com/kb/a266/medicaid-compliant-multi-discipline-prescription-template.aspx?KBSearchID=44979>

Service Location and Signature Notifications

- * All Service Locations and Signatures on session notes are reviewed.
- * When a location or signature is invalidated, the agency and/or independent provider will now get an auto generated email letting them know.
- * To setup who at the agency will receive the notifications, go to **Medicaid Service Bureau -> Full-Service Providers -> Notifications.**

Medicaid Provider Notification Maintenance

Filters

County: * Provider: *

Code	Description	
INVALIDLOC	Receive emails when locations marked as invalid.	Select
INVALIDSIG	Receive emails when signatures marked as invalid.	Select
RXEMAIL	Requesting Provider to print full-service orders.	Select

If notifications are not turned on, you will not get a notification email.

Service Locations

- * To review the service locations – go to **Caseload Maintenance – Service Location Approvals**.

County	EnrollmentType	Setting	Location	Latest Service Date	Status	
ORANGE	CBRS	Preschool		12/01/25	INVALID	Enrollments
DUTCHESS	CBRS	Preschool		01/05/26	INVALID	Enrollments
ORANGE	CBRS	Preschool	Bright Beginnings, Brookside Rd. New Paltz.	11/04/25	APPROVED	Enrollments

LastName	FirstName	CPSEChildNumber	ESID	EnrollmentType	Service	Setting	Location	Oldest Service Date	Newest Service Date
KESSLER	CHRISTOPHER	C44000322988	CBRS2526W0076116	CBRS	CSL	Preschool		12/01/25	12/01/25

Signature Approvals

- * Go to **People -> Signature Approval Listing**.
- * You can check the boxes to “Include Invalid Signatures” and “Include Approved Signatures”.

Signature Approvals
Filters
County Provider
☒ Include Invalid Signatures
☒ Include Approved Signatures

Provider	Last Name	First Name	CPSE Signature	Attendance Signature	Approved	Invalidated	Invalid Reason	Person Last Name	Person First Name	Person Signature	Notes
					09/02/25						
						09/09/25	Name Does Not Match CPSE Name				

Service Cycle Calendars

- * For agencies who now follow a 6 or 8 day calendar cycle **ONLY**.
- * Go to **Attendance -> Service Cycle Calendar Maintenance**:
 - * Enter a Cycle Calendar Name and select the school year.
- * To Maintain Cycle, click on the Maintain Cycle button.

Service Cycle Calendars

Filters

Provider: *

School Year Session: *

Retrieve

Cycle Calendar Name	School Schedule	Service Cycle	Start Date	End Date	Number of Cycles			
6 Day Cycle	2026-2027 School Year	6-Day Cycle	9/3/2026	6/25/2027	30	Edit	Delete	Maintain Cycle
	--optional--	6-Day Cycle				Add		

Maintaining Service Cycle Calendars

- * When you select the Maintain Cycle button, this will now bring up the full calendar based on the start & end dates

Maintain Cycle Calendar

Calendar Info

Cycle Calendar: Jones, Jane
Based on School Schedule: n/a
Start Date: 7/6/2026
End Date: 8/15/2026
Days in Cycle: 6

Regenerate Calendar Days Export Calendar to Excel

Monday	Tuesday	Wednesday	Thursday	Friday
7/6/2026 Day 1	7/7/2026 Day 2	7/8/2026 Day 3	7/9/2026 Day 4	7/10/2026 Day 5
7/13/2026 Day 6	7/14/2026 Day 1	7/15/2026 Day 2	7/16/2026 Day 3	7/17/2026 Day 4
7/20/2026 Day 5	7/21/2026 Day 6	7/22/2026 Day 1	7/23/2026 Day 2	7/24/2026 Day 3
7/27/2026 Day 4	7/28/2026 Day 5	7/29/2026 Day 6	7/30/2026 Day 1	7/31/2026 Day 2
8/3/2026 Day 3	8/4/2026 Day 4	8/5/2026 Day 5	8/6/2026 Day 6	8/7/2026 Day 1
8/10/2026 Day 2	8/11/2026 Day 3	8/12/2026 Day 4	8/13/2026 Day 5	8/14/2026 Day 6

Monday	Tuesday	Wednesday	Thursday	Friday
7/6/2026 Day 1	7/7/2026 Day 2	7/8/2026 Day 3	7/9/2026 Day 4	7/10/2026 Day 5

newcpsetest says

Are you sure you want to modify the days in this service cycle calendar?

OK Cancel

Monday	Tuesday	Wednesday	Thursday	Friday
7/6/2026 Day 1	7/7/2026 Day 2	7/8/2026 No Service	7/9/2026 Day 3	7/10/2026 Day 4

- Click the **X** for Wednesday, 7/8/26, Day #3
- Are you sure you want to modify... Click OK
- Now Day #3 is on Thursday – instead of Wednesday

CBRS Billing

- * Over the years, counties have been losing Medicaid revenue due to unsubmitted CBRS services. These services bring in the bulk of their Medicaid revenue.
- * Agencies will submit their CB tuition vouchers but not always submit the CBRS zero dollar amount voucher or not submit services that have billing issues at all.
- * We have found that that these services are never corrected or never billed to the county.
- * There is a new edit in the Portal that will be turned on within the coming month.
- * This edit will allow counties to choose how long you can go without submitting all CBRS services.
- * Therefore, it is imperative that all CBRS services now have sessions that match the enrollment.

CBRS Billing

- * If the enrollment is for 2x30, then you will now need 2 attendances for every week in the Portal.
 - * The sessions can be 2 provided sessions, or 1 provided & 1 missed or 2 missed sessions.
- * You will not be able to bill your CB voucher unless all sessions are accounted for on your CBRS voucher.
- * Your county will be able to choose how long you can go without billing the CBRS. Here is an example below of how this will work:
 - * If a county chooses 0 months, then you will not be able to bill the current CB voucher unless every CBRS service has attendances to match the enrollments and are vouchered & billed.
 - * If a county chooses 1 month, then you will not be able to bill the next month unless all CBRS services are vouchered and billed for the prior month.

CBRS Billing

- * When this is ready to go into effect, McGuinness will let your counties know and you will receive an email from your county.
- * The email will let you know how many months you can bill until you need to correct the missing CBRS services. This will be different for each county as they can choose the number of months.
- * McGuinness will also hold a CBRS Billing Webinar on this topic.
- * To get a jump start on this, you should let your clinicians know that **every** enrollment will need to have attendances that match the frequency.
- * Again, if an enrollment is 2x30 then you will need:
 - * 2 provided attendances or 1 provided & 1 missed attendance or 2 missed attendances per week.



Review Of Unmatched Children And Unmatched Enrollments

Unmatched Children & Unmatched Enrollments

- * **Do Not wait** for the “official” county enrollment to be entered by the county or school district.
- * Agencies and Independent Providers have the ability to create “unmatched” children and enrollments.
- * Unmatched children and enrollments are “placeholders”. They exist so you can work contemporaneously while waiting for the official record to be created by the county or school district. You will most likely have to begin therapy prior to the creation of the official enrollment.
- * With an unmatched child and/or unmatched enrollments, your therapists can complete treatment logs, create digital orders, upload prescriptions, etc.
- * When the official county record is created, the billing provider (*agency/independent provider*) will need to “match” the temporary (*unmatched*) record to the official record. The matching process moves all the written orders, treatment logs, etc., to the “official” county record and the temporary (*unmatched*) record is deleted.

Links to Creating Unmatched Children & Unmatched Enrollments

- * Entering Unmatched Children and Unmatched Enrollments:
 - * <https://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx?KBSearchID=43182>
- * Entering Unmatched CBRS Enrollments:
 - * <https://support.cpseportal.com/kb/a254/entering-unmatched-cbrs-enrollments.aspx?KBSearchID=43182>
- * Editing an Unmatched Child:
 - * <https://support.cpseportal.com/kb/a124/editing-an-unmatched-child.aspx?KBSearchID=43182>
- * View Unmatched Enrollments:
 - * <https://support.cpseportal.com/kb/a184/view-unmatched-enrollments.aspx?KBSearchID=43182>

Links to Matching Unmatched Children & Unmatched Enrollments

- * Matching Unmatched Children:

- * <https://support.cpseportal.com/kb/a175/matching-unmatched-children.aspx?KBSearchID=43182>

- * Matching Unmatched Enrollments:

- * <https://support.cpseportal.com/kb/a433/matching-unmatched-enrollments.aspx?KBSearchID=43182>

- * Editing an Unmatched Child:

- * <https://support.cpseportal.com/kb/a124/editing-an-unmatched-child.aspx?KBSearchID=43182>



Review Of Items Not Ready To Be Billed Report

Items Not Ready To Be Billed Report (Items That Prevent You From Billing)

- * Go to **Billing -> Items Not Ready To Be Billed** and use filter:
- * Enrollment Type CB:
 - * Teacher needs to sign attendances,
 - * Outside Enrollment Dates – attendances need to be moved or deleted,
 - * Enrollment Rescinded - attendances need to be moved or deleted.

Items Not Ready To be Billed

Filters

Provider:LEARNING TOGETHER, INC.▼

County:ORANGE▼

School Year Session:2025 - 2026 Winter▼

Service Month From:

Service Month To:

Enrollment Type:CB▼

Service Type:

Program Code:

Retrieve

Last Name	First Name	Service Provider	DOB	ESID	From	To	Month	Service Dates		Problem	Service Type	Frequency	Sessions	Amount	
ALLISON	ADRIAN		01/10/22	CB2526W0036947	09/04/25	06/26/26	Jan 2026	1/1, 1/2, 1/16, 1/19		Not signed	Classroom	5 hrs/day	4.00		Attendances
AVILES	DARLINE		03/08/22	CB2526W0037098	12/01/25	06/26/26	Jan 2026	1/1, 1/2, 1/16, 1/19		Not signed	Classroom	5 hrs/day	4.00		Attendances
BARRON	DEON		01/15/21	CB2526W0036585	09/04/25	06/26/26	Jan 2026	1/1, 1/2, 1/16, 1/19		Not signed	Classroom	5 hrs/day	4.00		Attendances
BARRON	DEON		01/15/21	CB2526W0036586	09/04/25	06/26/26	Jan 2026	1/1, 1/2, 1/16, 1/19		Not signed	Classroom	5 hrs/day	4.00		Attendances
BARRY	MICKIE		02/25/21	CB2526W0036571	09/04/25	06/26/26	Jan 2026	1/1, 1/2, 1/16, 1/19		Not signed	Classroom	5 hrs/day	4.00		Attendances
BENAVIDES	GIL		06/23/21	CB2526W0037099	11/20/25	06/26/26	Jan 2026	1/1, 1/2, 1/16, 1/19		Not signed	Classroom	5 hrs/day	4.00		Attendances
BERNAL	JOSEF		08/30/21	CB2526W0036611	09/04/25	06/26/26	Jan 2026	1/1, 1/2, 1/16, 1/19		Not signed	Classroom	5 hrs/day	4.00		Attendances
BIGGS	HILMA		07/26/21	CB2526W0036407	09/04/25	06/26/26	Jan 2026	1/1, 1/2, 1/16, 1/19		Not signed	Classroom	5 hrs/day	4.00		Attendances
BLANCHARD	BEN		02/19/22	CB2526W0036949	09/04/25	06/26/26	Jan 2026	1/1, 1/2, 1/16, 1/19		Not signed	Classroom	5 hrs/day	4.00		Attendances
BLOOM	ALTON		02/09/22	CB2526W0036932	09/04/25	10/31/25	Jan 2026	1/16, 1/19		Outside Enrollment Dates	Classroom	5 hrs/day	2.00		Attendances

Items Not Ready To Be Billed Report (Items That Prevent You From Billing)

- * Enrollment type CBRS, RS or SEIT:

- * This will show attendances that need to be signed or co-signed.
- * **All session notes need to be signed or co-signed within 45 days to be eligible for Medicaid billing.**
- * If Outside of Enrollment Dates or Enrollment Rescinded, then attendances need to be moved over to new enrollment.

Items Not Ready To be Billed

[Filters](#)

Provider: County:
School Year Session: Service Month From: Service Month To:
Enrollment Type: Service Type: Program Code:

Last Name	First Name	ServiceProvider	DOB	ESID	From	To	Month	Service Dates	Problem	ServiceType	Frequency	Sessions	Amount	
ALLISON	ADRIAN	Schlott, Miriam	01/10/22	CBRS2526W0076177	09/04/25	06/26/26	Jan 2026	1/6	Not Co-signed	OT (Indv)	2x30	1.00	\$0.00	Attendances
AVILES	DARLINE	Vreeland, Brenda	03/08/22	CBRS2526W0076526	12/01/25	06/26/26	Jan 2026	1/6	Not Co-signed	OT (Indv)	2x30	1.00	\$0.00	Attendances
BENAVIDES	GIL	Asencio, Kimberly	06/23/21	CBRS2526W0076528	11/20/25	06/26/26	Jan 2026	1/6	Not Co-signed	ST (Indv)	2x30	1.00	\$0.00	Attendances
BERNAL	JOSEF	Stahli, Jennifer	08/30/21	CBRS2526W0075383	09/04/25	06/26/26	Jan 2026	1/6	Not signed	ST (Indv)	2x30	1.00	\$0.00	Attendances
BLANCHARD	BEN	Casales, Susana	02/19/22	CBRS2526W0076184	09/04/25	06/26/26	Jan 2026	1/6	Not signed	PT (Indv)	2x30	1.00	\$0.00	Attendances

Items Not Ready To Be Billed Report - (Items That Prevent You From Billing)

- * **Attendances not signed or co-signed:**

- * Contact the therapist(s) to have them sign their attendances ASAP. Therapists should be signing their notes after they enter them at least on a weekly basis if not sooner.
 - * If a therapist leaves your agency prior to attendances being signed / co-signed, the agency **CANNOT** sign these attendances.
 - * Contact the therapist and ask them to log into the Portal and sign / co-sign attendances.

- * **Center Based classroom attendance not signed:**

- * Teachers or billing admins must enter and sign classroom attendance.
- * Most Full-Service Medicaid counties require an attendance for everyday of the week.

Items Not Ready To Be Billed Report - (Items That Prevent You From Billing)

- * **Enrollment is rescinded:**

- * If the school district or county has rescinded an enrollment, the attendances on the rescinded enrollment can be moved over to the new county enrollment. Follow the steps in the link below on ***How to Move Attendances Between Enrollments***.

- * <http://support.cpseportal.com/kb/a444/how-to-move-attendances-between-enrollments.aspx?KBSearchID=23237>

- * **Attendances are outside of the enrollment dates:**

- * If there are attendances outside of the enrollment dates, those attendances will need to be moved over to the proper enrollment.

- * Below is a link to the Knowledge Base article on ***How to Move Attendances Between Enrollments***:

- * <http://support.cpseportal.com/kb/a444/how-to-move-attendances-between-enrollments.aspx?KBSearchID=23237>

Items Not Ready To Be Billed Report - (Items That Prevent You From Billing)

- * **Unmatched child or unmatched enrollment:**

- * You cannot bill for an unmatched child or unmatched enrollment.
- * Go to **Caseload Maintenance -> Unmatched Children or View Unmatched Enrollments** and try to match the child and/or enrollment.
- * If there is a potential or no match, go to **Reports -> Enrollments Uploaded By County**. Change the filter to the current school year and see if the county has uploaded the child and/or enrollments to the Portal.
 - * If the child is not on the report, then you can contact the school district or county to see when the child and/or enrollment will be uploaded.
 - * If the child is on this report, make sure that you have the correct spelling of the child's name, correct school district and DOB.
 - * If any of these items are wrong, you will not be able to match the child. You will then need to go **Caseload Maintenance -> Unmatched Children** and edit your child to match the counties entry. If the counties entry is wrong, then contact the school district or county to make necessary changes.



Credential Verification

Credential Verification / Approval Billing Errors

- * **Non-verified credential exists or Non-verified credential exists for co-signer:**
 - * Go to *People -> Service Provider Credential Verification Listing* and verify the therapist's credentials.
- * **County has not approved service provider credentials or County has not approved co-signers credentials:**
 - * For all Full-Service Medicaid counties, contact McGuinness at Medicaid@CPSEPortal.com to have credentials approved. Please include with the therapist's name and what county their attendances are in.
- * **Service Provider does not have the credentials to sign for this service or Co-signer not valid for cosigning:**
 - * Check therapist's credentials as their license dates may need to be updated.

Credential Verification Knowledge Base Articles

- * How to verify or update credentials shown in the Knowledge Base articles below.
- * Credential Verification for Agencies:
 - * <https://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx>
- * Updating Credentials – for both the therapist and the agency:
 - * <https://support.cpseportal.com/kb/a340/updating-credentials.aspx>



Conditional Approvals and Extensions

Conditional Approval Process

For Full-Service Medicaid counties, the Medicaid team reviews the following information on all Credential Approvals:

1. The license info from the Office of Professions:
 - a) Does the first & last name match the license?
 - b) Does the profession match the license?
 - c) Does the license # and dates match the license?
2. The NPI Registry information:
 - a) Does the first & last name match the NPI Registry?
 - b) Is the NPI # for an individual or an organization?
3. Is there a signature & credentials on the signature?
4. If this is an SLP, is the SLP OPRA enrolled?

Credential Approval Errors

- * For the issues listed below, McGuinness will undo the Credential Verification and send a Portal auto email responder with the issue and how to correct to the therapist and the agency.
- * **Signature Name:**
 - * Signature name in the Portal does not match the therapist's name in the Portal.
- * **Signature Missing Name:**
 - * Signature in the Portal does not contain the therapist's name.
- * **Signature Missing Credentials:**
 - * Signature name in the Portal does not contain therapist's credentials.

Credential Approval Errors

- * **License Dates in Portal Do Not Match NY License on NYSED Office of Professions:**
 - * The Original Date of Licensure in the Portal **must** match the Date of Licensure from the Office of Professions.
 - * The Registered Through Date in the Portal **must** match the Registered Through Date from the Office of Professions. This will be the last day of that month.
- * **Update Person or Credential Information:**
 - * Credentials in Portal do not match Profession.

Conditionally Approved Credentials

- * When Conditionally Approving Credentials, McGuinness will Conditionally Approve Credentials for a specific length of time and send a Portal email auto responder with the issue and how many days the therapist was conditionally approved for to the therapist and the agency .
- * **CPSE Name differs from NPI Registry Name (30 days):**
 - * Providers name listed on the NPPES NPI Registry does not match the Portal.
- * **CPSE Name differs from NY License Name (90 days):**
 - * Providers name listed on license from the Office of Professions does not match the Portal.
- * **SLP Not OPRA Enrolled (45 days):**
 - * SLP is not OPRA enrolled. Must supply tracking # from eMedNY to have credentials extended to 180 days. Billing **will be suspended** after 45 days.



Service Location Approvals

Service Location Approvals

- * All attendances need a setting and a location. These are **not** the same.
- * The setting is where the service was. Example: therapy room, preschool, daycare etc.
- * The location is the name and/or address of the setting.
 - * If the setting is preschool – then the location should be the name of the preschool. If there are multiple preschools with that name, then also enter the address.
- * As session notes are signed, the settings and locations come over to the Medicaid team for approval.
- * To see approved or invalidated locations, go to **Caseload Maintenance -> Service Location Approvals**.

Service Location Approvals

- * This will show you locations that have been approved or invalidated.
- * Click on the Enrollments button and now you will see the children who have the invalidated location and the service dates.
- * The service location needs to be corrected and re-verified before you can bill

Service Location Approvals For Provider

Filters

County Provider

School Year Session

County	EnrollmentType	Setting	Location	Latest Service Date	Status	
NASSAU	RS	Preschool	Preschool	11/18/25	INVALID	Enrollments

Enrollments for Service Location Approvals

LastName	FirstName	CPSEChildNumber	ESID	EnrollmentType	Service	Setting	Location	Oldest Service Date	Newest Service Date
	DONOVAN	C28000331273	RS2526W021	RS	PNT	Preschool	Preschool	09/25/25	11/18/25
	MARIE	C28000300044	RS2526W021	RS	PNT	Preschool	Preschool	09/10/25	11/17/25

Service Location Approvals

- * Highlighted in green are approved locations.
- * Highlighted in yellow are invalidated locations.
- * Click on the Enrollments for the Invalid Status.
- * This will show you the dates that are invalid.

County	EnrollmentType	Setting	Location	Latest Service Date	Status	Enrollments
	CBRS	Preschool		12/17/25	INVALID	Enrollments
	CBRS	Preschool	classroom	12/19/25	INVALID	Enrollments
	CBRS	Preschool	Therapy Room	12/18/25	INVALID	Enrollments
	CBRS	Therapy Room		01/06/26	INVALID	Enrollments
	CBRS	Therapy Room	Easterseals, Project Discovery	10/27/25	APPROVED	Enrollments
	CBRS	Therapy Room	Easterseals, Project Discovery: 197 Jersey Ave	12/19/25	APPROVED	Enrollments

CPSEChildNumber	ESID	EnrollmentType	Service	Setting	Location	Oldest Service Date	Newest Service Date
C44000330	CBRS2526W00	CBRS	ST	Preschool		12/17/25	12/17/25
C44000322	CBRS2526W00	CBRS	ST	Preschool		09/12/25	12/11/25
C44000322	CBRS2526W00	CBRS	ST	Preschool		09/08/25	09/15/25
C44000338	CBRS2526W00	CBRS	ST	Preschool		12/01/25	12/16/25
C44000323	CBRS2526W00	CBRS	ST	Preschool		12/10/25	12/10/25
C44000323	CBRS2526W00	CBRS	ST	Preschool		09/30/25	09/30/25
C44000333	CBRS2526W00	CBRS	ST	Preschool		10/09/25	10/30/25

Service Setting / Location Billing Errors

- * **Service Location Not Approved:**

- * For Full-Service Medicaid - all service locations must be approved by the Medicaid team. Send an email to Medicaid@CPSEPortal.com for review and approval of locations.

- * **Service Location is not valid for Medicaid Services:**

- * Go to **Caseload Maintenance -> Service Location Approvals** and filter for county & school year session. You will see a list of locations that are approved and/or invalidated and the enrollments.
- * Click on the Enrollments button to see what enrollment(s) and date(s) need to be changed.

- * **Service Setting required when Service Location Approval is required:**

- * All session notes must have a setting.

Service Setting / Location Billing Errors

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		589	1/2/2026	6/25/2026	ST (Indv)	2x30	Service Location is not valid for Medicaid Services.	Attendances
		391	12/15/2025	6/25/2026	ST (Indv)	2x30	Service Setting required when Service Location Approval is required	Attendances
		159	4/13/2026	6/25/2026	ST (Indv)	2x30	Service Setting required when Service Location Approval is required	Attendances
		569	1/12/2026	6/25/2026	ST (Indv)	2x30	Service Setting required when Service Location Approval is required	Attendances
		199	9/2/2025	6/25/2026	ST (Indv)	2x30	Service Setting required when Service Location Approval is required	Attendances



Signature Approvals

Signature Approval Listing

- * All signatures on session notes must now be approved.
- * Go to **People -> Signature Approval Listing**.
 - * Filter for Include Invalid Signatures.
- * In the screen shot you can see that the Attendance Signature has a name but no credentials.

Signature Approvals

Filters

County

Provider

☒ Include Invalid Signatures

☐ Include Approved Signatures

Retrieve

Provider	Last Name	First Name	CPSE Signature	Attendance Signature	Approved	Invalidated	Invalid Reason	Person Last Name	Person First Name	Person Signature	Notes
		Ashley	Ashley / , M.S. CCC-SLP	ASHLEY / :0762, 1750685		03/17/25	Missing Credential / Title				
		LIANN MARIE	LIANN / , DPT	LIANN / 029492, 1366684623		12/23/24	Missing Credential / Title				
		ELIZABETH	Elizabeth / MS CCC-SLP TSSLD	Elizabeth / 594, 181135		12/23/24	Missing Credential / Title				
		Angela	Angela / , M.A., CCC-SLP	ANGELA / :505, 1619		09/24/25	Missing Credential / Title				

For help contact: Medicaid@CPSEPortal.com

Signature Approval Listing

- * Most of the signature issues comes from agencies that bill from an outside system.
- * The therapist's signature needs to be corrected in your outside system.
- * Now the session notes need to be corrected.
- * Once signature and notes are corrected, the Medicaid team can review signature again for accuracy.

Signature Approval Billing Errors

- * **Approved Therapist Signature Required for Medicaid Services or Approved Supervisor Signature Required for Medicaid Services:**
 - * Contact the Medicaid team at Medicaid@CPSEPortal.com to approve signature.
- * **Therapist Signature is not valid for Medicaid Services or Supervisor Signature is not valid for Medicaid Services:**
 - * Go to **People -> Signature Approval Listing**, choose county and check the box for Include Invalid Signatures. You can see what therapists' signatures were invalidated and the reason why.
 - * The signature must be corrected in the Portal or your outside billing system.



Prescriptions

Prescription Errors

- * All Full-Service Medicaid counties require a prescription to be uploaded to bill.
- * You must also attach the enrollment to the prescription, or you will receive an error.
 - * For the error below, either the prescription is missing,
 - * Or the prescription was uploaded and the enrollment was not attached.
- * If you cannot attach the enrollment(s), send an email to Medicaid@cpseportal.com with the ESID # and someone on the team will attach the enrollment(s).

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		C	3/24/2025	6/20/2025	ST (Indv)	2x30	Details of Prescription/order not entered for enrollment.	Attendances



Creating a Classroom Schedule

Creating A Classroom Schedule

- * Most Full-Service Medicaid counties require an attendance for everyday of the week.
- * Attendances are green for present & red for absent.
- * By creating a classroom schedule, you will create closures for the teachers. Those closures will then be greyed out.
- * If you need help creating the classroom schedule, send an email to Support@cpseportal.com and someone from the Help Desk will assist.
- * Instructions:
 - * <http://support.cpseportal.com/kb/a228/creating-a-schedule-for-the-school.aspx?KBSearchID=35487>

Center Based Billing Errors

- * **County requires a CB enrollment attendance entry record for every weekday of the month:**
 - * Review attendances for any missing present/absent days. Enter missing attendance(s) or contact teacher to enter and sign attendances.



Supervision

Supervision Errors

- * **Supervised attendance requires Supervision Plan:**
 - * The child is being serviced by a clinician that requires supervision. Create the supervision plan between the supervisor and the supervisee.
- * **First Supervisor meeting date required to submit supervision:**
 - * All supervision requires a Face-To-Face date. This is the date that the supervisor, supervisee and child all meet together for the first time. You will need to enter the Face-To-Face date.
- * **Billable attendance cannot occur prior to first face-to-face meeting date:**
 - * Medicaid cannot be billed for attendances prior to the face-to-face date. All attendances prior to the face-to-face date will need to be marked as “Does Not Meet Medicaid Requirements”. This can be completed by the therapist or the billing admin.

Supervision Knowledge Base Articles

- * Supervision Billing Errors:
 - * <https://support.cpseportal.com/kb/a473/supervision-billing-errors.aspx>
- * Supervision Plans (UDO/Pre-License):
 - * <https://support.cpseportal.com/kb/a443/supervision-plans-udo-pre-license.aspx>
- * Supervision Quick Reference Guide:
 - * https://support.cpseportal.com/kb/a458/supervision-quick-reference-guide_.aspx
- * Supervision Webinar:
 - * <https://support.cpseportal.com/kb/a712/02-supervision.aspx>



Defaults

Defaults for Therapists

- * Therapists should be entering “Defaults” for the students they service.
- * This will help to alleviate the missing Service Setting and Location issues.
- * Once defaults are entered, all attendances will now automatically include:
 - * The service setting,
 - * The location,
 - * The CPT Code and
 - * The ICD Code.
- * Please share the below Knowledge Base article with your providers to setup defaults:
 - * <https://support.cpseportal.com/kb/a243/setting-up-defaults-in-your-caseload.aspx>



Billing Errors

Billing Errors

- * When you try to submit your voucher(s), you may encounter Problems on Voucher.
- * To review the problems, click on “View Problems”.

Submit voucher(s) for [redacted] (unbilled CBRS vouchers).

[redacted] CBRS

Select any Unbilled Vouchers

Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed	
☒	11/10/2025	CBRS251110115006	July 2025 PreK I			July 2025 Tuition for Integrated PreSchool Student	[redacted]	Business Administrator	29	\$0.00	
☒	12/8/2025	CBRS251208104231	Aug 2025 PreK			August 2025 Tuition for Integrated PreK Students	[redacted]	Business Administrator	39	\$0.00	
☐	12/31/2025	CBRS251231134601							3	\$0.00	Problems on Voucher View Problems

☒ Select All Total Billed: \$0.00

[Submit Voucher\(s\)](#)



- * Now you can see the children with a problem and what their problem is.
- * In the screenshot below, you can see that the first child has “Service Location is not valid for Medicaid Services”.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
[redacted]	GERMAN	CBRS2526S000-[redacted]	7/7/2025	8/15/2025	PT (Indv)	2x30	Service Location is not valid for Medicaid Services.	Attendances
	SYNTHIA	CBRS2526S000-[redacted]	7/7/2025	8/15/2025	PT (Indv)	2x30	Details of Prescription/order not entered for enrollment.	Attendances



Billing Errors

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
	GERMAN	CBRS2526S000	7/7/2025	8/15/2025	PT (Indv)	2x30	Service Location is not valid for Medicaid Services.	Attendances
	SYNTHIA	CBRS2526S000	7/7/2025	8/15/2025	PT (Indv)	2x30	Details of Prescription/order not entered for enrollment.	Attendances

- * Now you will click on the attendances.
 - * All the yellow attendances, are the attendances on this voucher.
 - * The attendance that is in **RED**, is the attendance with an issue.

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 #	Treatment Log
07/07/25	Missed Treatment Session		Not OK	10:30 AM	11:00 AM	30	1.00	30	Ju	Classroom	I	07/08/25	07/08/25	CBRS251231134601	Treatment Log
07/09/25	Missed Treatment Session		Not OK	12:00 PM	12:30 PM	30	1.00	30	Ju	Therapy Room	I	07/09/25	07/09/25	CBRS251231134601	Treatment Log
07/14/25	Missed Treatment Session		Not OK	10:15 AM	10:30 AM	15	0.50	30	Ju		I	07/14/25	07/14/25	CBRS251231134601	Treatment Log
07/16/25	Missed Treatment Session		Not OK	11:30 AM	12:00 PM	30	1.00	30	Ju		I	07/16/25	07/16/25	CBRS251231134601	Treatment Log
07/21/25	Missed Treatment Session		Not OK	10:30 AM	11:00 AM	30	1.00	30	Ju		I	07/21/25	07/21/25		Treatment Log Details
07/23/25	Missed Treatment Session		Not OK	10:30 AM	11:00 AM	30	1.00	30	Ju		I	07/23/25	07/23/25	CBRS251231134601	Treatment Log
07/28/25	Missed Treatment Session		Not OK	10:45 AM	11:00 AM	15	0.50	30	Ju		I	07/28/25	07/28/25	CBRS251231134601	Treatment Log
07/30/25	Provided Treatment Session			12:00 PM	12:30 PM	30	1.00	30	Ju	Therapy Room	I	07/30/25	07/30/25	CBRS251231134601	Treatment Log
08/04/25	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30	Ju	Therapy Room	I	08/04/25	08/04/25	CBRS251231134601	Treatment Log
08/06/25	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30	Ju	Therapy Room	I	08/06/25	08/06/25	CBRS251231134601	Treatment Log
08/11/25	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30	Ju	Therapy Room	I	08/11/25	08/11/25	CBRS251231134601	Treatment Log
08/15/25	Provided Treatment Session			12:00 PM	12:30 PM	30	1.00	30	Ju	Therapy Room	I	08/15/25	08/15/25	CBRS251231134601	Treatment Log

Billing Errors

- * You can click on the “Treatment Log” to review what was entered for the location of this attendance.

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 #	Treatment Log
07/07/25	Missed Treatment Session		Not OK	10:30 AM	11:00 AM	30	1.00	30		Classroom	I	07/08/25	07/08/25	CBRS251231134601	Treatment Log
07/09/25	Missed Treatment Session		Not OK	12:00 PM	12:30 PM	30	1.00	30		Therapy Room	I	07/09/25	07/09/25	CBRS251231134601	Treatment Log
07/14/25	Missed Treatment Session		Not OK	10:15 AM	10:30 AM	15	0.50	30			I	07/14/25	07/14/25	CBRS251231134601	Treatment Log
07/16/25	Missed Treatment Session		Not OK	11:30 AM	12:00 PM	30	1.00	30			I	07/16/25	07/16/25	CBRS251231134601	Treatment Log
07/21/25	Missed Treatment Session		Not OK	10:30 AM	11:00 AM	30	1.00	30			I	07/21/25	07/21/25		Treatment Log Details
07/23/25	Missed Treatment Session		Not OK	10:30 AM	11:00 AM	30	1.00	30			I	07/23/25	07/23/25	CBRS251231134601	Treatment Log
07/28/25	Missed Treatment Session		Not OK	10:45 AM	11:00 AM	15	0.50	30			I	07/28/25	07/28/25	CBRS251231134601	Treatment Log
07/30/25	Provided Treatment Session			12:00 PM	12:30 PM	30	1.00	30		Therapy Room	I	07/30/25	07/30/25	CBRS251231134601	Treatment Log
08/04/25	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30		Therapy Room	I	08/04/25	08/04/25	CBRS251231134601	Treatment Log
08/06/25	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30		Therapy Room	I	08/06/25	08/06/25	CBRS251231134601	Treatment Log
08/11/25	Provided Treatment Session			10:30 AM	11:00 AM	30	1.00	30		Therapy Room	I	08/11/25	08/11/25	CBRS251231134601	Treatment Log
08/15/25	Provided Treatment Session			12:00 PM	12:30 PM	30	1.00	30	Julie Morada	Therapy Room	I	08/15/25	08/15/25	CBRS251231134601	Treatment Log

Billing Errors

- * Now you can see that the location was entered as “WEB complex”.
- * If this attendances was audited by eMedNY, would the auditor know what or where “WEB complex” was?

CPSE PORTAL				Treatment Log			
Child Name			DOB		Billing Provider		NPI
			11/30/20				
Service	Individual/Group	IEP From	IEP To	District		County	
Physical Therapy	Individual	07/07/25	08/15/25				
Frequency	ESID	Date Of Service		Rendering Provider	License	NPI	
2x30	CBRS2526S0004	08/15/25					
Setting	Time In	Time Out	Duration	# in Group	Supervising Provider (UDO/USO)	License	NPI
Therapy Room	12:00 PM	12:30 PM	30				
Location					Referring Provider		NPI
WEB complex							
CPT	Units	Minutes	Description		ICD	Description	
97530	2	30	THERAPEUTIC ACTIVITIES, DIRECT (ONE-ON-ONE) PATIENT		F84.0	Autistic disorder	
Session Notes: Activity Related to IEP Goals (including objectives and measures of success) and response(s) of child							
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.							

Billing Errors

- * To correct this error:

1. The billing admin must remove the child from the voucher.
2. Have the therapist unsign note, correct the location for the attendance of 8/15/25 and resign the note.
3. Once completed, the billing admin must “recalc” the voucher and add the child back to the voucher.

- * The billing error should then be gone.

Billing Errors

- * To correct the error of “Details of Prescription/order not entered for enrollment”:
 1. The billing admin should review child to see if the prescription was uploaded.
 2. If there is not a prescription uploaded to the Portal, then the billing admin will need to upload the script and attach the enrollment.
 3. If there is a prescription for this service in the Portal, then most likely the enrollment was not attached when uploaded.
 4. You can reupload the script and attach the enrollment or you can email Medicaid@cpseportal.com and the Medicaid team can attach the enrollment.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
	GERMAN	CBRS2526S000-	7/7/2025	8/15/2025	PT (Indv)	2x30	Service Location is not valid for Medicaid Services.	Attendances
	SYNTHIA	CBRS2526S000-	7/7/2025	8/15/2025	PT (Indv)	2x30	Details of Prescription/order not entered for enrollment.	Attendances

Billing Errors

- * One of the handouts for this webinar is the Submitting Voucher Errors Guide for Billing Admins.
 1. All billing errors are listed in this guide.
 2. How to correct the error is listed under the billing error.
 3. There may also be a Knowledge Base article link to read with instructions if needed.



Why Don't Attendance(s) Appear on my Voucher?

Why Doesn't Attendance Appear on my Voucher?

- * There are several reasons why attendances are not available to be put on a voucher. On the Voucher Details Screen, attendances will not appear on the list of items to put on a voucher for the following reasons:
- * **The attendance has been added or modified (matched, signed/co-signed) since the voucher was created:**
 - * Try using “Recalc” to have system look for ready attendances.
- * **The attendance is on an unmatched enrollment (no ESID):**
 - * Match to County Created enrollment and then “Recalc” the voucher.
- * **The attendance is missing a Signed Date or Cosigned Date:**
 - * Review the Items Not Ready to Be Billed Report.
 - * Have the therapist/supervisor sign or co-sign the attendance.

Why Doesn't Attendance Appear on my Voucher?

- * **The attendance is on another Voucher:**

- * If the other voucher has not been downloaded by the county, you can unsubmit that voucher.
- * If the County denied any attendance(s) on that other voucher, submit request to **support@CPSEPortal.com** to rebill for that ESID and date of service.

- * **The rates have not yet been uploaded:**

- * This can be checked by going to **Lookup -> Enrollment Lookup** and Select the School Year Session, County, Provider, and Enrollment Type.
- * The column that reads "Rates" will show if there is a rate. If the rate is \$0, then you cannot bill for this ESID. Contact your county to send the rate to the Portal.
 - * The only rates that will be \$0 are CBRS enrollments as they are already included in the tuition.

Billing Consecutively

- * You should continually be reviewing your Items Not Ready To Be Billed report.
- * It is important that you bill each month and not wait until your billing accumulates.
 - * Errors need to be corrected and re-signed.
- * It is very important that billing gets billed consecutively, especially for Center Based programs as they are tuition based.
 - * Do **NOT** bill August before July as this creates an issue when billing.



General Help Desk Questions

General Help Desk Questions

- * **When will our students be entered so that schedules can be made and scripts can be uploaded?**
 - * *The districts are responsible for entering students into eSTACs. If they have not yet entered a child or services, you should create an unmatched child/enrollment in CPSE Portal and match it to the county enrollment when it is uploaded to the Portal.*
 - * *To see if the district has assigned students to you, go to **eSTACs -> Reports -> Submitted Placements**. Now you can choose the county, the district and click “Retrieve”. This report will show you all the children that the district has assigned to your agency and has been submitted to the county.*

General Help Desk Questions

- * **How do you print all services for a child that show sessions held and non sessions?**
 - * *You can print Session notes by going to **Reports -> Child Treatment Log**. You will then filter Provider, Service Dates, County & Child and choose Print Report. This report can be downloaded and saved as a PDF and can be printed at any time.*
- * **For home-based related services do you just write "home" or the address of the child's home?**
 - * *If you are servicing the child in person at the child's home, the therapist would enter the setting as home and the location as home or the home address.*

SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- * **When would you move attendances to other enrollments?**

- * *If you entered session notes on the wrong enrollment or the county has rescinded the enrollment, you would use the Move Attendance Between Enrollments feature to move the attendances that are on the wrong/rescinded enrollment to the correct enrollment. The Knowledge Base article link on this topic is: <http://support.cpseportal.com/kb/a53/move-attendance-between-enrollments.aspx?KBSearchID=17194>*

- * **How would you enter a group where one child is in this Portal, but another child is school-age or from another county and their notes are in a different system or on paper?**

- * *Enter the number of children in the group (this # will include preschool, school-age & students in another county). Enter notes for all Portal preschool children in the group.*

SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- * **What happens if a child is absent for the scheduled therapy session but later comes in and is marked as present in the classroom or visa versa will that be an issue?**
 - * *If the child comes in late and was absent for your session you can mark it as an absence. This will not cause an issue.*
- * **For Center-Based programs will you need to enter the agency name and address each time or will you be able to select it after you initially enter it?**
 - * *The CPSE Portal will save your frequently used locations, so after you enter the address the first time, you should be able to select your address later. Also, have your providers create “Defaults” and this will not be an issue.*

SUBMITTED QUESTIONS – BILLING

- * **Can services be billed on an unmatched record?**

- * You cannot bill on an unmatched record. Make sure that you check for any potential matches frequently so you can bill at the end of the month.*

- * **For related services within a Center-Based program, can an agency bill for a student if scripts have not been submitted?**

- * No, a prescription needs to be uploaded and attached to an enrollment to be able to bill for any service.*



Follow-up

Follow-up

- * **Each attendee will be emailed the following information as follow-up to the Webinar:**
 - * The recording of the Presentation,
 - * The PowerPoint Presentation,
 - * Any handouts and
 - * Q&A for any questions asked.

Getting Support Help

- * If you need help with any Medicaid issues, please email the Medicaid team at Medicaid@cpseportal.com.
- * If you need help with any Portal issues, please email the Support team at Support@cpseportal.com.
- * Remember to **NOT** use children's names in your email. You should be using the ESID or Child #.
- * Please include which County you work with and a description of your issue.
- * If you would like to speak on the phone, please state so in your email along with your phone number and best times to reach you.

Webinar Survey

The day after the webinar, you should receive an email from Go To Webinar with a brief survey. We would appreciate if you took the time to complete the survey for future webinars.

Thank you

James McGuinness & Associates