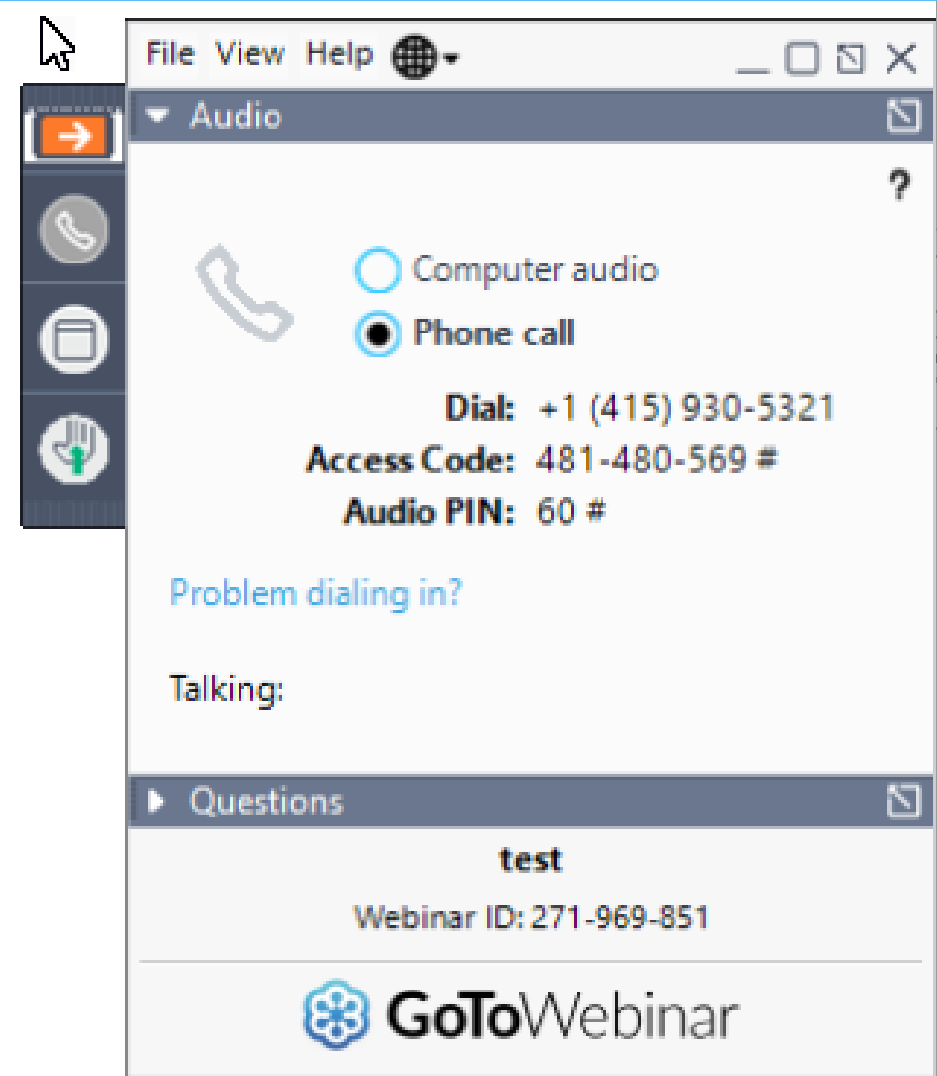


# Goto Webinar Control Panel

- \* Control panel is on far right of screen
- \* Orange button with white arrow expands and shrinks control panel

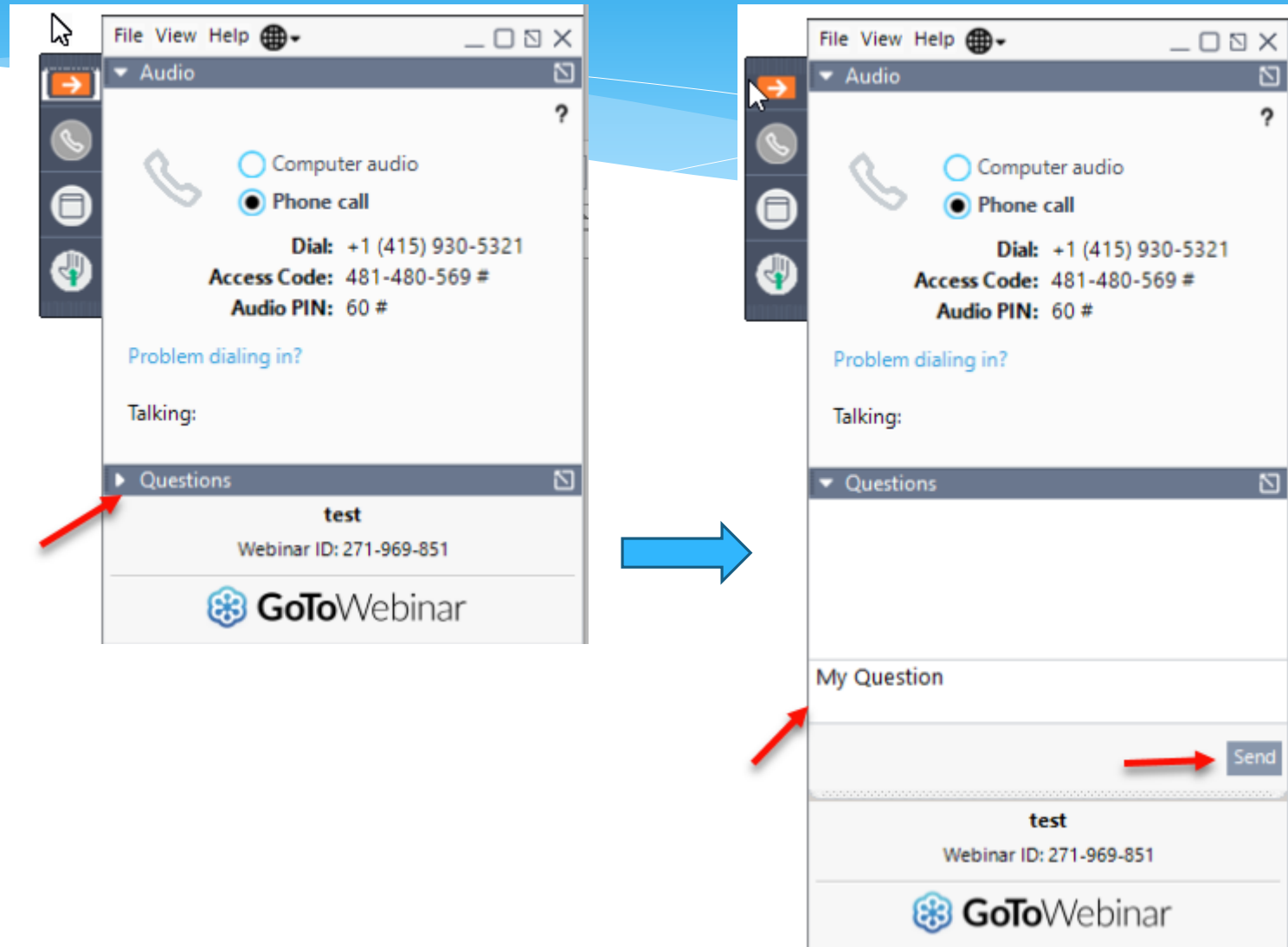


# Communicating with Presenter

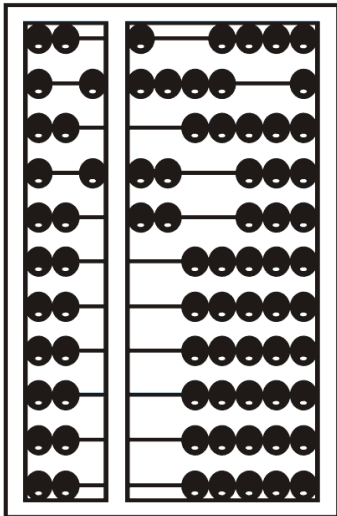
- \* All participants are on mute
- \* You can type in question in the question box
- \* We will answer your question, and also stop at some point to review the questions and answers for everyone.

# Typing in a Question

- \* Click the question bar to expand questions section
- \* Type in your question and click send



JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants



# Ulster County Review / Q&A

# INTRODUCTIONS

- ❑ Deborah Frank, Medicaid Specialist
- ❑ Brianne Borter, Medicaid Department
- ❑ Kaitlyn Schmitz, Client Relationship Manager

# PURPOSE OF WEBINAR

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

- ❑ “Review” any topics from previous webinars, and
- ❑ To “answer any questions” pertaining to any topics that have been covered in previous webinars.
- ❑ McGuinness also included some slides on previously-covered topics that we have determined would be beneficial to review.

# TOPICS COVERED

## ☐ Review Topics

- Review of the Unmatched Child / Enrollments Process – **Slide 8**
  - Q/A – Matched/Unmatched Enrollments
- Co-Signing Session Notes for PTA's, COTA's & CFY's – **Slide 22**

## ☐ Questions/Answers

- General – **Slide 25**
- Attendance/Session Notes – **Slide 26**
- Parent Signature Logs – **Slide 35**
- Billing – **Slide 36**
- Reports – **Slide 37**

## ☐ Review Topic

- How to Complete Digital Speech Recommendations (for SLPs only) – **Slide 38**

# UNMATCHED CHILDREN & ENROLLMENTS

## REVIEW OF UNMATCHED CHILDREN & ENROLLMENTS



# UNMATCHED CHILDREN & ENROLLMENTS

**How does this work when the county/school district doesn't create an enrollment until after the service starts?**

- **Do Not wait** for the “official” enrollment to be entered by the county/school district before completing the digital order. You will most likely have to begin therapy prior to the creation of the official enrollment.
- 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*).
- With an unmatched child and/or enrollment, you can complete treatment logs, create digital orders, upload prescriptions, etc.
- When the official 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” record and the temporary (*unmatched*) record is deleted.

# HOW TO CREATE AN UNMATCHED CHILD

- ❑ Go to **Caseload Maintenance > Unmatched Children** & click Add Child
- ❑ Fill in the “Add Child” Screen > Click Add

(Make sure this information is correct, if the official record has different information (i.e., different DOB or service dates), the two records will not match.)

|      |               |            |        |            |         |                      |        |         |          |        |            |                |
|------|---------------|------------|--------|------------|---------|----------------------|--------|---------|----------|--------|------------|----------------|
| Home | File Transfer | Activities | eSTACs | Attendance | Billing | Caseload Maintenance | Lookup | Reports | Medicaid | People | My Account | Knowledge Base |
|------|---------------|------------|--------|------------|---------|----------------------|--------|---------|----------|--------|------------|----------------|

**Unmatched Children** **Add Child** **Click "Add Child"**

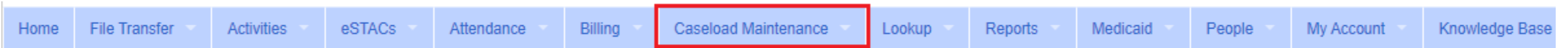
| Last Name | First Name | MI | DOB | County | District | Address1 | City | State | Zip | HomePhone |             |               |      |        |
|-----------|------------|----|-----|--------|----------|----------|------|-------|-----|-----------|-------------|---------------|------|--------|
|           |            |    |     |        |          |          |      | NY    |     |           | Enrollments | Attempt Match | Edit | Delete |
|           |            |    |     |        |          |          |      | NY    |     |           | Enrollments | Attempt Match | Edit | Delete |
|           |            |    |     |        |          |          |      | NY    |     |           | Enrollments | Attempt Match | Edit | Delete |

**Add Child**  
Provider   
County  District   
Last Name  First Name  MI   
DOB  Gender   
Address 1  Address 2   
City  State  Zip   
Home Phone   
SEDSTACID   
**Add** **Fill in all the pertinent information and click Add.**

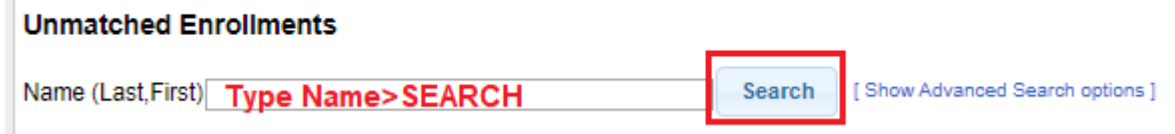
**\*To Edit or Delete an unmatched child, click the appropriate button at the end of the row.**

# HOW TO CREATE AN UNMATCHED ENROLLMENT

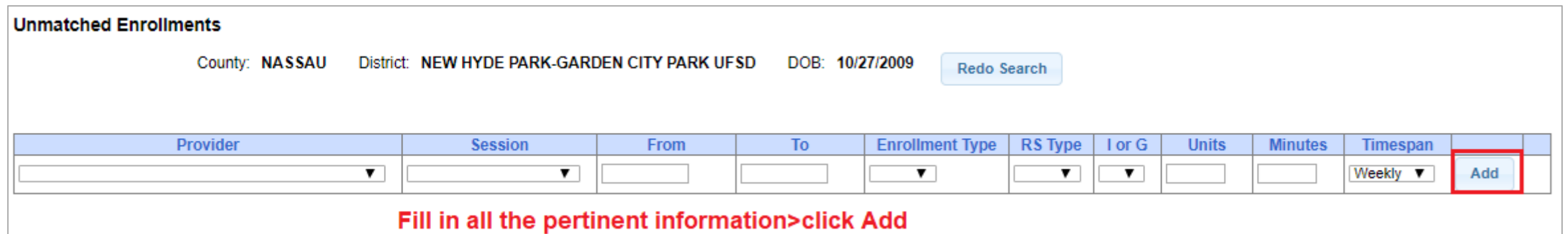
## Go to **Caseload Maintenance > Add/Edit Unmatched Enrollments**



- Type the child's name into the Name box > Click SEARCH

A form titled 'Unmatched Enrollments'. It contains a text input field labeled 'Name (Last,First)' with the placeholder text 'Type Name>SEARCH'. To the right of the input field is a button labeled 'Search', which is highlighted with a red rectangular box. Further to the right is a link that says '[ Show Advanced Search options ]'.

- Fill in all the pertinent information in the table (*Session, Enrollment Type, Etc.*).
- Click “Add” at the end of the row.

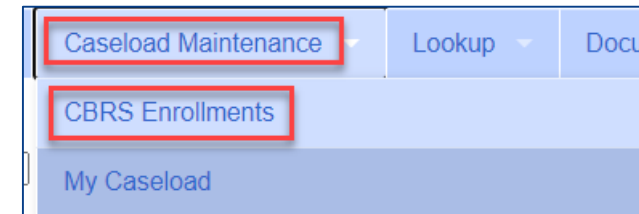
A screenshot of the 'Unmatched Enrollments' interface. At the top, there are search filters: 'County: NASSAU', 'District: NEW HYDE PARK-GARDEN CITY PARK UFSD', and 'DOB: 10/27/2009'. To the right of these filters is a 'Redo Search' button. Below the filters is a table with 11 columns: Provider, Session, From, To, Enrollment Type, RS Type, I or G, Units, Minutes, Timespan, and an empty column. The first row of the table has dropdown menus for 'Provider', 'Session', 'Enrollment Type', 'RS Type', and 'I or G'. The 'Timespan' column has a dropdown menu set to 'Weekly'. The last column is an 'Add' button, which is highlighted with a red rectangular box. Below the table, there is a red text instruction: 'Fill in all the pertinent information>click Add'.

# HOW TO CREATE AN UNMATCHED CBRS ENROLLMENT

❑ At this point, the CB enrollment has already been created.

❑ Go to **Caseload Maintenance>CBRS Enrollments**

- Select the correct session,
- Enter the Provider
- Enter the County
- Enter the child's information (Last Name, First Name, DOB)
- Click Search



## CB Enrollments

Session  Provider  County  Last Name  First Name  DOB

| County      | District                   | Last Name | First Name | ElectronicServiceID | Provider     | Program | Start Date | End Date   |        |
|-------------|----------------------------|-----------|------------|---------------------|--------------|---------|------------|------------|--------|
| SCHENECTADY | Burnt Hills- Ballston Lake | Smith     | Lisa       |                     | ACHIEVEMENTS | -G      | 01/20/2020 | 06/25/2020 | Select |

# HOW TO CREATE AN UNMATCHED CBRS ENROLLMENT

- Fill in the following CBRS data.

- ✓ From and To Dates
- ✓ RS Type (OT/PT/ST)
- ✓ Individual or Group
- ✓ Units (Frequency)
- ✓ Minutes (Duration)
- ✓ Time Span (Weekly, Monthly, etc.)
- ✓ Click ADD

Home File Transfer Activities eSTACs Attendance Billing Caseload Maintenance Lookup Documents Reports Medicaid People My Account

**CB Enrollments**

Session: 2019 - 2020 Winter Provider: ACHIEVEMENTS County: SCHENECTADY Last Name: Smith First Name: Lisa DOB: 7/29/16

| County      | District                | Last Name | First Name | Electronic ServiceID | Provider     | Program | Start Date | End Date   |        |
|-------------|-------------------------|-----------|------------|----------------------|--------------|---------|------------|------------|--------|
| SCHENECTADY | Burnt Hills-Baldon Lake | Smith     | Lisa       |                      | ACHIEVEMENTS | G       | 01/20/2020 | 06/25/2020 | Select |

Included Services for

| ElectronicServiceID | From       | To        | RS Type | I or G | Units | Minutes | Timespan |             |
|---------------------|------------|-----------|---------|--------|-------|---------|----------|-------------|
|                     | 12/14/2020 | 6/25/2021 | ST      | I      | 2.00  | 30      | WEEKLY   | Edit Delete |
|                     | 12/14/2020 | 6/25/2021 |         |        |       |         | WEEKLY   | Add         |

# HOW TO MATCH AN UNMATCHED CHILD

- ❑ Go to **Caseload Maintenance > Unmatched Children**
- ❑ Click on the “Attempt Match” link

**Unmatched Children** [Add Child](#)

| Child Number | Last Name | First Name | MI | DOB       | County      | District                | Address1 | City | State | Zip | HomePhone |             |               |             |
|--------------|-----------|------------|----|-----------|-------------|-------------------------|----------|------|-------|-----|-----------|-------------|---------------|-------------|
| C52000155289 | ABRAMS    | EDDIE      |    | 8/10/2015 | SARATOGA    | WATERFORD-HALFMOON UFSD |          |      | NY    |     |           | Enrollments | Attempt Match | Edit Delete |
| C53000155702 | Frank     | Deb        |    | 7/25/2016 | SCHENECTADY | BALLSTON SPA CSD        |          |      | NY    |     |           | Enrollments | Attempt Match | Edit Delete |

- ❑ Click Select

## Match Child Against County-Imported Child

### Current Unmatched Child:

County: District: DOB: 12/12/2017

### Potential Matches:

Showing children matching the DOB, and with the same first and last name.

|        | Last Name | First Name | MI | DOB        | County | District | Address1 | City | State | Zip   | Home Phone |
|--------|-----------|------------|----|------------|--------|----------|----------|------|-------|-------|------------|
| Select |           | MON        |    | 12/12/2017 |        |          |          |      | NY    | 10000 |            |

# HOW TO MATCH AN UNMATCHED CHILD

- ❑ After you click Select, the unmatched child (on the bottom left) and official record (on the bottom right) added by the County will appear at the bottom of the screen.
- ❑ If the child's name and date of birth match for both records, click Match.

**Match Child Against County-Imported Child**

**Current Unmatched Child:**  
County: District: DOB: 12/12/2017

**Potential Matches:**  
Showing children matching the DOB, and with the same first and last name.

|        | Last Name | First Name | MI | DOB        | County | District | Address1 | City | State | Zip | Home Phone |
|--------|-----------|------------|----|------------|--------|----------|----------|------|-------|-----|------------|
| Select |           | MON        |    | 12/12/2017 |        |          |          |      | NY    | 108 |            |

**WARNING:** By clicking the button below, you are combining these two children (including any associated data - not limited to: enrollments, attendances, medicaid correct. This cannot be undone.

, MON (12/12/2017) → , MOI (12/12/2017)

Match!

# HOW TO MATCH AN UNMATCHED ENROLLMENT

- ❑ Go to **Caseload Maintenance > View Unmatched Enrollments**
- ❑ Type in the Child's name > SEARCH
- ❑ Find the child in the list and click the “Attempt Enrollment Match” link.

**Unmatched Enrollments**  
School Year: All School Years Retrieve

| County | Child Number | Last Name | First Name | DOB      | School Year | From     | To       | Type | Service | Description |             |   |
|--------|--------------|-----------|------------|----------|-------------|----------|----------|------|---------|-------------|-------------|---|
|        | C6600017     |           |            | 07/14/17 | 202021      | 01/27/21 | 06/25/21 | RS   | ST      | 1x30        | Attendances | <a href="#">Attempt Enrollment Match</a> <a href="#">Delete</a> |
|        | C660001      |           |            | 01/18/14 | 201718      | 09/05/17 | 06/22/18 | RS   | ST      | 2x30        | Attendances | Attempt Child Match <a href="#">Delete</a>                      |

## Match Enrollment Against County-Imported Enrollment

Child:  County:  District:  DOB: 7/14/2017

### Current Unmatched Enrollment:

Session: 2020 - 2021 Winter From Date: 1/27/2021 To Date: 6/25/2021  
Enrollment Type: RS Service Type: ST Individual or Group: I Frequency: 1x30

### Potential Matches:

|                        | Enrollment Type | Service Type | Session            | From Date | To Date   | I or G | Frequency | ESID     |
|------------------------|-----------------|--------------|--------------------|-----------|-----------|--------|-----------|----------|
| <a href="#">Select</a> | RS              | ST           | 2020 - 2021 Winter | 1/27/2021 | 6/25/2021 | I      | 1x30      | RS2021WC |
| <a href="#">Select</a> | RS              | ST           | 2020 - 2021 Winter | 1/27/2021 | 6/25/2021 | I      | 1x60      | RS2021WC |



# HOW TO MATCH AN UNMATCHED ENROLLMENT

- ❑ After you click SELECT for the correct enrollment, the unmatched enrollment information and the official enrollment information appear at the bottom of the screen.
- ❑ If the unmatched dates of service and frequency matches the official enrollment, click the MATCH button.

The screenshot displays a user interface for matching enrollments. On the left, under the heading "UNMATCHED ENROLLMENT", the text "(1/27/2021 - 6/25/2021)" and "1x30" are enclosed in a red rectangular box. A blue arrow points from this box to a second box on the right. This second box, under the heading "RS2021W0", also contains the text "(1/27/2021 - 6/25/2021)" and "1x30" and is similarly outlined in red. Below these two boxes is a light blue button with the text "Match!" in black.

# SUBMITTED QUESTIONS – MATCHED/UNMATCHED ENROLLMENTS

- \* **The county will enter the information if time allows and we just have to match the child to our therapists?**
- \* *The county will enter the enrollment and all of the child's information once they receive the STAC1 from the school district. While waiting for the county enrollment, either the **agency or the Independent Provider** should create an unmatched child and unmatched enrollment so you can assign a therapist to the child, record attendance and session notes. Once the county creates the official county created child record, you will then match your unmatched child to the county record, and the records will merge. Anything you added to your unmatched child's record will now be added to the county created record.*

# SUBMITTED QUESTIONS – MATCHED/UNMATCHED ENROLLMENTS

## \* Does the county match enrollments?

- \* No, the county does not match enrollments. The **agency or Independent Provider** will need to match the unmatched child/enrollment once the county creates the official enrollment record for the child. Attached is the Knowledge Base article on this topic:  
<http://support.cpseportal.com/kb/a175/matching-unmatched-children-and-enrollments.aspx?KBSearchID=17179>

## \* What happens if the wrong child gets matched to an enrollment?

- \* The child gets matched before the enrollment can be matched, so as long as the child was matched correctly that issue shouldn't occur. If you have matched the wrong child or wrong enrollment, reach out to the Portal Support Team at [support@cpseportal.com](mailto:support@cpseportal.com) for help.

# SUBMITTED QUESTIONS – MATCHED/UNMATCHED ENROLLMENTS

- \* **Who at the county will be managing the Portal regarding Enrollments, Unmatched Children/Enrollments, Matching, Etc.**
  - \* *The county does not handle Portal questions. McGuinness has a Support Team that answers all questions regarding the Portal. You can send your questions directly to: **Support@cpseportal.com**.*
  - \* *Regarding enrollments: The county will be entering enrollments into the Portal once they receive the STAC1 from the school district. This is why the unmatched process is needed. Any questions regarding enrollments can be directed to county.*


# SUBMITTED QUESTIONS – MATCHED/UNMATCHED ENROLLMENTS

- \* **Can corrections be made to records, including the info the county has entered?**
  - \* *No, you cannot make corrections to County created records, but you can make corrections on your unmatched record. To make a correction to your unmatched record (usually to edit the DOB or spelling of the child's name) you will go to **Caseload Maintenance > Add/Edit Unmatched Enrollments**. This feature can be used by the agency or Independent Provider only. If a correction does need to be made on the County record, you will need to contact the County to make the correction.*

## Unmatched Enrollments

M [REDACTED] County: **NASSAU** District: **HEWLETT-WOODMERE UFSD** DOB: **9/17/2017**

[Redo Search](#)

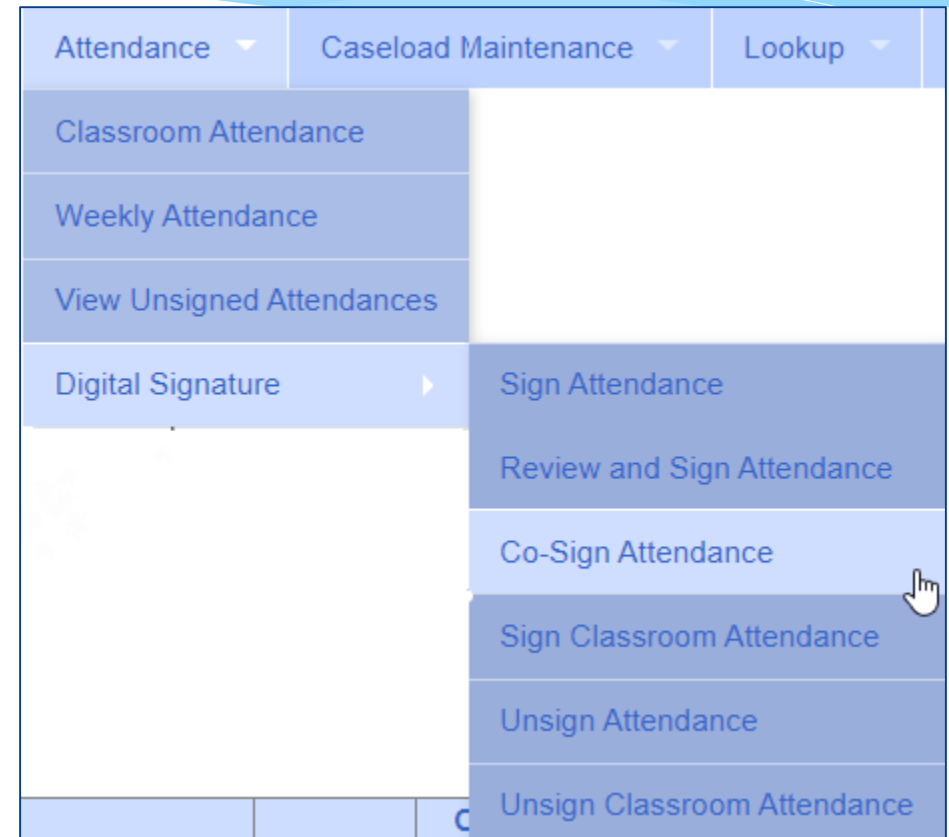
| Provider      | Session            | From      | To        | Enrollment Type | RS Type | I or G | Units | Minutes | Timespan |  |  |
|---------------|--------------------|-----------|-----------|-----------------|---------|--------|-------|---------|----------|--|--|
| Ba [REDACTED] | 2020 - 2021 Winter | 4/30/2021 | 6/25/2021 | RS              | PSY     | I      | 1.00  | 60      | Weekly   |  <a href="#">Edit</a> | <a href="#">Attempt Match</a> <a href="#">Delete</a> |

# Co-Signing Session Notes

REVIEW OF  
CO-SIGNING SESSION NOTES FOR  
PTA's, COTA's & CFY's

# Co-Signing Session Notes

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



# Co-Signing Session Notes

- \* Use your **filter to select date range**, therapist and a specific enrollment.
- \* Once you have selected your filters, click "**Retrieve**"
- \* After reviewing 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.



# SUBMITTED QUESTIONS – GENERAL

- \* **When a child lookup is completed, can an agency or itinerant see every student that the County has entered?**
  - \* *No, the agency will only be able to see students specifically assigned to that agency, and a provider will only see students assigned to that provider.*
- \* **When will our summer school students be entered so that schedules can be made and scripts and IEPs uploaded?**
  - \* *The county is responsible for uploading students into the Portal. If they have not yet entered a child, you should enter an unmatched enrollment in CPSE Portal and match it to the county enrollment when it is uploaded to the Portal.*

# SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- \* **Will the notes from previous sessions be transferred to this new system?**
  - \* *No, notes written prior to July 1, 2021, will not be entered into the Portal.*
- \* **If a child is absent and you enter that in the entry type, do you write anything under session notes regarding the reason, or should you do a separate entry under Activity Management?**
  - \* *You must mark the session as a Missed Treatment Session (this session will show in red on your weekly calendar) so you have the option of choosing a Make-Up Session in the future. If you know the reason why the session is missed you can write this in the session note. At this time, counties do not require any information from the Activity Management. It is up to your agency should they want you to enter information in the Activity Management.*

# SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- \* **Will the county require providers to submit a paper copy of classroom attendance for 2021-22? School closures currently show on the Portal as blank spaces (with no reason) because the Portal only reports “Present” or “Absent”.**
  - \* *Classroom attendance that is entered into the Portal will print with the Billing Voucher when billing is completed. Ulster County is also requiring that all absences (including school closures) be written on the bottom of the Classroom Attendance form. You also have the option of entering any absences and reasons under Activity Management. This can also be printed and submitted to the county if needed.*
- \* **How soon after the session do session notes need to be entered?**
  - \* *Medicaid requires that session notes be completed as soon as possible after the session. For supervising therapists, Medicaid requires co-signatures to be completed within 45 days.*

# SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- \* **Is there a way to create weekly schedules from which we can enter session notes? I know we can access a calendar to enter our notes, but it seems that the entire session note needs to be entered each time. The system we used previously allowed access to different daily schedules for regularly scheduled sessions.**
  - \* *No, there is not a way to create weekly schedules. You will need to enter all attendances (present, absent or make-up) on your Weekly Calendar, and write a session note for each student.*
- \* **Can we assign a pre-schedule into the Portal and work off a specific timed schedule?**
  - \* *No, you cannot prefill the Portal with a schedule.*

# SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- \* **Can you revise a note as long as you unsign it?**
  - \* *Yes, you can revise a session note until it is attached to a voucher or has been submitted for billing. Remember to resign any session notes that you have revised.*
- \* **If you unsign a note to make an edit or amendment, do you lose the contemporaneous documentation?**
  - \* *No, you will not lose the contemporaneous documentation. Un-signing will allow you to make changes your session note. Remember to resign your session note.*

# SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- \* **Is signing all of your notes at the end of the week acceptable?**

- \* Yes, you can sign either daily or weekly. You will need to sign before the sessions can be submitted for billing. There is a report where you can see all of your unsigned attendances to review and sign them. We recommend that you **do not** wait until the end of the month to sign your notes. Any errors will cause issues for billing, and it's easier to fix the issues as they arise instead of waiting until the end of the month when you may not remember.

- \* **How do you know if a CPT Code is a timed code?**

- \* The list of CPT codes and their descriptions can be found at:  
<http://www.oms.nysed.gov/medicaid/resources/>

# SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- \* **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. You can also print from the Activities tab by going to **Activities > View Child Activities by Therapist**. This will include all session notes , and any activities entered by the therapist. Both reports can be downloaded and saved as a PDF, and can be printed at any time.

View Child Activities by Therapist

Filters

Provider

All Providers

Therapist

Os

h

School Year

2016 - 2017

Enrollment

C

2x30 - OT - I 03/20/17 - 06/23/17

From Date

04/01/2017

To Date

04/30/2017

Show Notes

☒

Include Attendance / Treatment Logs

☒

Search

Excel

| Child | Service Provider | County | ESID           | Enrollment Description                            | Activity       | Attendance Type | Date      | Start Time | End Time | Duration | Sessions To Bill | Notes  |
|-------|------------------|--------|----------------|---|----------------|-----------------|-----------|------------|----------|----------|------------------|--|
| CE    | Os               | Albany | RS1617W0020006 | RS (OT) 9200-2 2x30 - I - (03/20/2017-06/23/2017) | Attendance     |                 | 4/03/2017 | 9:30 AM    | 10:00 AM | 30       | 1.00             | Sensory organizing input via walking on soft stepping stones controlling speed and reciprocal foot placement instead of one foot on, one foot on floor along with vibration and Moro Reflex Integration exercises. Bilateral hand use with linking bees by color for 26 bees. Eli continues to drool with fine motor activities. |
| CE    | Os               | Albany | RS1617W0020006 | RS (OT) 9200-2 2x30 - I - (03/20/2017-06/23/2017) | Attendance     |                 | 4/07/2017 | 1:05 PM    | 1:35 PM  | 30       | 1.00             | Following organizing Moro Reflex Integration exercises and vibration to extremities, Eli participated in stacking monkeys for bilateral hand use and imitation of simple designs needing frequent prompts for bilateral hand use.  |
| CE    | Os               | Albany | RS1617W0020006 | RS (OT) 9200-2 2x30 - I - (03/20/2017-06/23/2017) | Attendance     |                 | 4/10/2017 | 9:30 AM    | 10:00 AM | 30       | 1.00             | Continue Moro Reflex Integration exercises and vibration along with bouncing on small therapy ball holding the handle needing assistance to maintain balance and keep feet on floor. Prone over therapy ball with upper extremity weight bearing to complete 9 piece single inset puzzle.  |
| CE    | Os               | Albany | RS1617W0020006 | RS (OT) 9200-2 2x30 - I - (03/20/2017-06/23/2017) | School Holiday |                 | 4/14/2017 | 1:00 AM    | 1:30 AM  | 30       |                  |  |



# SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- \* **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 you would enter the setting as home and the location as the child's home address. After you enter the address once, it will save and be available to choose for future sessions.*
- \* **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>*



# SUBMITTED QUESTIONS – ATTENDANCE/SESSION NOTES

- \* **How would you enter a group where one child is in this Portal but another child is school age and their notes are in a different system?**
  - \* *Enter all of the children in the group who are in the CPSE Portal and leave out the others as their names are not available to choose from.*
- \* **What will happen if the students in the group are from different counties? Will the county see all the students?**
  - \* *The county will only be able to see the children that are in their county.*
- \* **How do the therapists add times for a missed session? What if the therapist is able to fill the scheduled time with another child?**
  - \* *The therapist will enter an attendance and mark the session as a **Missed Treatment Session** in the time slot that was scheduled for the first child. The therapist can also provide service to another child in this time slot, as they will create another attendance for the second child, and this will not cause any issues with billing.*

# 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 should 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 on.*

# SUBMITTED QUESTIONS – PARENT SIGNATURE LOGS

- \* **Will providers be expected to print (and mail) the Parent Signature Logs to the county monthly?**
  - \* *Yes, the Parent Signature Logs will still need to be completed and mailed to the county each month along with the Billing Vouchers.*

# SUBMITTED QUESTIONS – BILLING

*We have received a few previously-submitted questions related to Billing.*

*We will answer the submitted questions, but since the Billing webinars have not been delivered yet, we are going to limit any further responses regarding **Billing**.*

## **Dates for the upcoming Billing Webinars:**

- **Thursday, July 29, at 2:30**
- **Monday, August 9, at 2:30**
- **Tuesday, August 10, at 2:30**
- **Wednesday, August 11, at 11:00**

# SUBMITTED QUESTIONS – BILLING

- \* **Will providers be expected to print and submit electronic billing each month?**
  - \* *A provider who works for an agency will not need to submit electronic billing. The agency or Independent Provider will need to submit electronic billing each month.*
- \* **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 in order to 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 for an agency or an Independent Provider to be able to bill for any service. Send your prescriptions to Ulster County, and they will upload to the Portal.*

# SUBMITTED QUESTIONS – REPORTS

- \* Does the Portal have a report that can be pulled for the RS-2 of SED-4 Reports, or a report that can be run year-end that gives the number of services that should have been provided to each child versus what was actually provided?
- \* The CPSE Portal does not provide a full report containing all of the information requested above. However, an agency can go to **Lookup > Enrollment Lookup** and can filter each county along with either CB, CBRS, RS or SEIT, the school year needed and retrieve a list of students. This list will provide the Frequency of the Service, the # of Sessions Billed, and the SED Weeks Enrolled. The list does not contain the # of missed sessions or the reason why the sessions were missed. It is suggested that each agency keep their own records.

| Home  | Activities | Attendance | Caseload Maintenance | Lookup | Documents | Reports  | My Account       | Knowledge Base |         |          |           |           |             |         |     |       |                 |                    |                         |             |
|---|------------|------------|----------------------|--------|-----------|----------|------------------|----------------|---------|----------|-----------|-----------|-------------|---------|-----|-------|-----------------|--------------------|-------------------------|-------------|
| <b>Enrollments</b>  |            |            |                      |        |           |          |                  |                |         |          |           |           |             |         |     |       |                 |                    |                         |             |
| School Year Session <span>2020 - 2021 Summer</span> County <span>SARATOGA</span> <input type="checkbox"/> CBRS <input checked="" type="checkbox"/> RS <input type="checkbox"/> SEIT <input type="checkbox"/> CB <input type="button" value="Search"/> |            |            |                      |        |           |          |                  |                |         |          |           |           |             |         |     |       |                 |                    |                         |             |
| Provider <span></span>  |            |            |                      |        |           |          |                  |                |         |          |           |           |             |         |     |       |                 |                    |                         |             |
| 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 | Attendances |
|   | RS2021S    |            |                      |        | SARATOGA  |          | SHENENDEHOWA CSD | RS             | ST      | 7/6/2020 | 8/14/2020 | 2x30      | I           | 9200-1  |     | 45.00 | 0.00            | 6                  | 6                       |             |

# QUESTIONS

Any other Questions?

# DIGITAL SPEECH RECOMMENDATIONS

## REVIEW OF DIGITAL SPEECH RECOMMENDATIONS



# ONE-TIME SET-UP – ORDERING PRACTITIONER

Prior to creating any digital order, there is a one-time set up that is required for the “**practitioner**” as well as the “**billing provider**.” If this is not set up prior to creating the digital order, the SLP will not be able to complete the digital order.

## FOR THE ORDERING PRACTITIONER: (My Account>My Profile)

- ☐ Ordering practitioner name
  - NPI and license information
  - Provider contact information including address and phone number
  - Signature
    - ✓ Signature title and credentials must be entered
    - ✓ Pin # must be set up

# ORDERING PRACTITIONER INFORMATION

My Account ▾

Knowledge Base

Change Password

User Account Details

My Credential Verifications

My Profile

My PIN

## 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)

Update

### Licenses / Certifications / Professions [NYS Office of the Professions]

|     | Description                            | Credential Type | #      | State | NY Profession Code | From      | To         | Active                              |      |        |
|-----|--|-----------------|--------|-------|--------------------|-----------|------------|-------------------------------------|------|--------|
| SLP | Licensed Speech & Language Pathologist | License         | 010654 | NY    | 058                | 9/15/1998 | 12/31/2021 | <input checked="" type="checkbox"/> | Edit | Remove |

Add

### Information from NPPES NPI Registry

[Click here for NPPES website](#)

NPI  This NPI is for an

First Name

Last Name

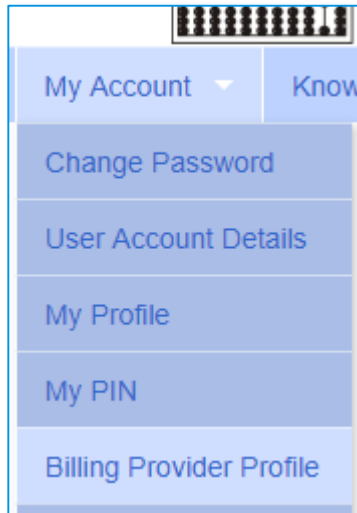
Credentials

Mailing Address 1

Mailing Address 2

City  State  Zip

# ONE-TIME SET-UP FOR THE BILLING PROVIDER

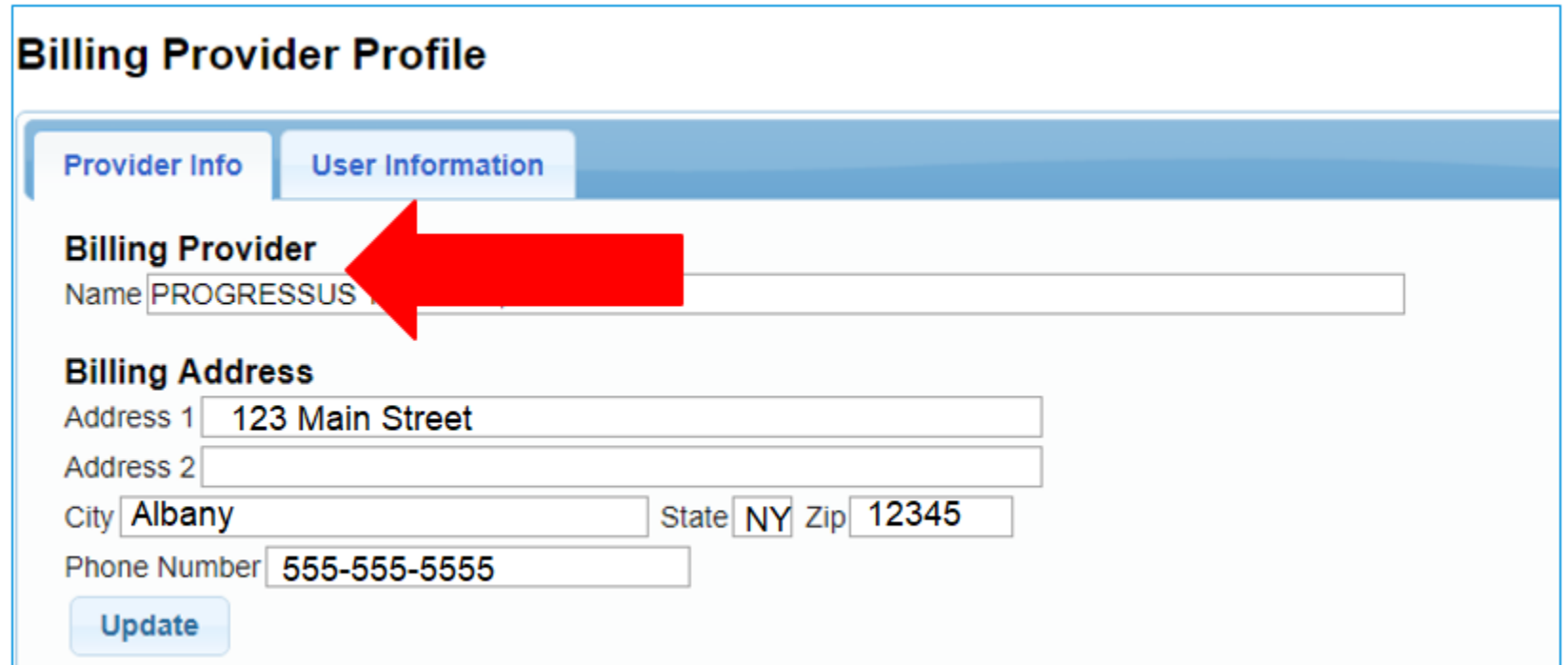


A screenshot of a web application's 'My Account' dropdown menu. The menu is open, showing several options: 'Change Password', 'User Account Details', 'My Profile', 'My PIN', and 'Billing Provider Profile'. The 'Billing Provider Profile' option is highlighted at the bottom of the list.

Go to **My Account>Billing Provider Profile**

Enter your complete billing address (*street, city, state, zip*) and phone number including area code.

Click **Update**



A screenshot of the 'Billing Provider Profile' form. The form has two tabs: 'Provider Info' and 'User Information'. The 'Billing Provider' section is active, and a red arrow points to the 'Name' field, which contains the text 'PROGRESSUS'. Below this is the 'Billing Address' section, which includes fields for 'Address 1' (123 Main Street), 'Address 2' (empty), 'City' (Albany), 'State' (NY), 'Zip' (12345), and 'Phone Number' (555-555-5555). An 'Update' button is located at the bottom of the form.

# CPSE PORTAL DIGITAL SPEECH RECOMMENDATION

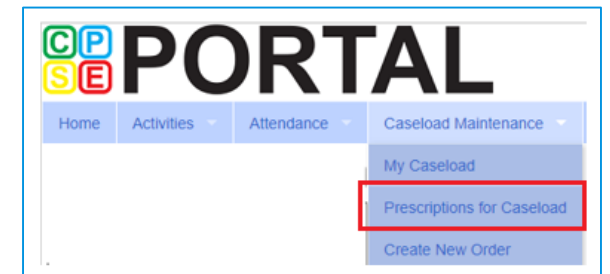
## (How to Create the Digital Order/Recommendation)

□ There are two ways to create the digital order.

- 1) **“Prescriptions for Caseload”** under the Caseload Maintenance Menu.

**Caseload Maintenance>Prescriptions for Caseload**

(Use this screen to enter initial/new prescriptions.)

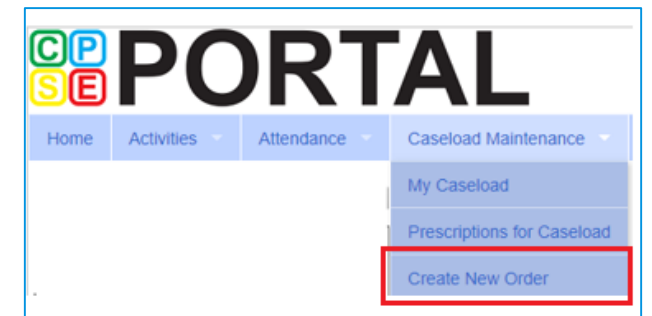


- 2) You can also use the **“Create New Order”** under the Caseload Maintenance Menu.

**Caseload Maintenance>Create New Order**

(Use this screen to enter subsequent prescriptions.

e.g., when a change in service occurs and a new Rx is required.)



# PRESCRIPTIONS FOR CASELOAD

For children who do not have a written order, you will see an additional column on the “Prescriptions / Written Orders for Caseload Screen that shows a link, **“Create Speech Recommendation.”**

| Prescriptions / Written Orders for Caseload |           |                               |           |                                       |                    |           |               |                 |                              |
|---|-----------|-------------------------------|-----------|---------------------------------------|--------------------|-----------|---------------|-----------------|------------------------------|
| Filter By                                   |           |                               |           |                                       |                    |           |               |                 |                              |
| Provider: <input type="text"/>              |           | Session: 2018 - 2019 Winter ▼ |           | <input type="button" value="Search"/> |                    |           |               |                 |                              |
| ESID  | Last Name | First Name                    | From Date | To Date                               | Description        | Rx Status | Rx Entry      | Rx Image        |                              |
|   |           |                               | 9/4/2018  | 6/26/2019                             | ST 1x30 Individual | ENTERED   | View          | View            |                              |
|   |           |                               | 9/4/2018  | 6/26/2019                             | ST 2x30 Individual | MISSING   | Enter Rx Info | Upload Rx Image | Create Speech Recommendation |
|   |           |                               | 9/4/2018  | 6/26/2019                             | ST 2x30 Individual | MISSING   | Enter Rx Info | Upload Rx Image | Create Speech Recommendation |
|   |           |                               | 9/4/2018  | 6/26/2019                             | ST 2x30 Individual | MISSING   | Enter Rx Info | Upload Rx Image | Create Speech Recommendation |
|   |           |                               | 9/4/2018  | 6/26/2019                             | ST1 1x30 Group     | MISSING   | Enter Rx Info | Upload Rx Image | Create Speech Recommendation |
|   |           |                               | 9/4/2018  | 6/26/2019                             | ST1 1x30 Group     | MISSING   | Enter Rx Info | Upload Rx Image | Create Speech Recommendation |
|   |           |                               | 9/4/2018  | 6/26/2019                             | ST 2x30 Individual | MISSING   | Enter Rx Info | Upload Rx Image | Create Speech Recommendation |

1. Click the **“Create Speech Recommendation”** link. When the link is activated, **six of the eight** required items will autofill the digital order template (*Child’s name, DOB, county, district, agency & term of service – date range*).
2. You will fill in the two remaining fields to complete the digital order.
  - \* Enter all applicable ICD Codes
  - \* Preview & Digitally Sign (with your Pin #)

(This option is only available to SLPs. The last column shown above will not be available to other disciplines.)

# CREATING THE DIGITAL ORDER

## Digital Recommendation Template

Everything above this line is auto-filled from information already in the Portal.

(Child's Name, DOB, County, District, Agency, Term of Service/date range - Six of the eight items)

The two items below this line will be completed by the SLP.

1. ICD Code(s)
2. Digital Signature



The screenshot shows the 'Create Digital Order' form. A horizontal red line divides the form into two sections. The top section contains auto-filled information: 'Child Lookup' with 'BAXTER, DAVIDA', 'County: SCHENECTADY', 'District: Schenectady', and 'DOB: 10/8/2014'. Below this is 'Create recommendation for Speech Services' with a dropdown menu showing 'THERAPY'. The 'Prescription effective date range' section has three radio button options: 'Applies to entire school year' (selected), 'Applies to specific school year / session', and 'Applies to specific date range'. The 'Reason for Services' section has an 'ICD' field with 'F80.2 F80' and a 'Reason' text area. At the bottom is a 'Preview and Sign' button. Red arrows point to specific fields with annotations: 'Fills in automatically.' points to the 'Redo Search' button; 'Fills in automatically.' points to the 'THERAPY' dropdown; 'Defaults to "Applies to Entire School Year, but you can select the other options."' points to the selected radio button; 'Type in the ICD Code(s).' points to the 'ICD' field; and 'Click Preview and Sign' points to the 'Preview and Sign' button.

\* **NOTE:** The date the digital recommendation is created, becomes the signature date of the recommendation and is the first date that Medicaid can be billed. The SLP may need to create an “unmatched enrollment” that the agency will need to “match” once the official record has been created. More on this topic later in the presentation.

# PREVIEW & SIGN THE DIGITAL ORDER

CPS

PORTAL

Hello, sstark. You are currently logged in for Shannon Stark. (Logout)

JAMES W & ASSOCIATES

Consul

[Home](#) [Activities](#) [Attendance](#) [Classroom Maintenance](#) [Lookup](#) [Reports](#) [My Account](#) [Knowledge Base](#)

### Speech Recommendation for Services

A Speech and Language referral for services is recommended in accordance with the request by the Committee on Preschool Special Education. Services, when provided, will be in accordance with the Individualized Education Program designed by the Committee.

**Name:** BARNES, EARL  
**DOB:** 2/24/2014  
**Provider:** PROGRESSUS THERAPY, LLC  
**District:** Schenectady  
**County:** SCHENECTADY  
**Period Covered:** 7/1/2018 To 6/30/2019

**Reason for Services**

| ICD Code(s) | ICD Description       |
|-------------|-----------------------|
| F80.0       | Phonological disorder |

**Provider Contact Information**

**Name:** PROGRESSUS THERAPY, LLC  
**Phone Number:** 8885551111  
**Address 1:** 123 Main Street  
**Address 2:**  
**City:** Albany **State:** NY **Zip:** 12245

**Licensed Speech and Language Pathologist Information**

**Name:** Stark, Shannon  
**NPI:** 1003129436  
**License:** 010664

**Digital Signature**

**Signature:** Shannon Stark, M.A. CCC/SLP **Date:** 1/14/2019

[Digitally Sign](#)

By entering my pin I am signing this recommendation for speech services

**Signature:** Shannon Stark, M.A. CCC/SLP

**NPI:** 1003129436

**Date:** 1/14/2019

**Pin:**

[I agree.](#)

**Preview to ensure accuracy. If accurate, click DIGITALLY SIGN.**

© James McGuinness & Associates



# DOWNLOADABLE / PRINTABLE COPY

If you are not successful in creating the digital speech recommendation, look at where the information is pulling from (noted in red) and try to determine if anything needs to be entered.

## ITEMS TO CHECK:

- **Create Digital Order Screen**
  - ✓ Data Entered by SLP (ICD Code & Signature)
- **My Account>Billing Provider Profile**
  - ✓ Address/Phone #
- **My Account>My Profile**
  - ✓ Name, NPI, License
  - ✓ Signature & Credentials
  - ✓ Digital Signature Set-up

The resulting Rx does not need to be printed, scanned, uploaded or entered into the Portal. The Rx is verified upon completion.

The Signature fills from the My Profile Screen (My Account>My Profile). If your signature and credentials are not filled in, the order cannot be created.

Period Covered: 201819 School Year ( Jul 01, 2018 to Jun 30, 2019 )

**Speech Recommendation for Services**

A Speech and Language referral for services is recommended in accordance with the request by the Committee on Preschool Special Education.

Services, when provided, will be in accordance with the Individualized Education Program designed by the Committee.

|                 |                         |
|-----------------|-------------------------|
| Student Name    | BARNES, EARL            |
| Date of Birth   | 02/24/2014              |
| Agency/Provider | PROGRESSUS THERAPY, LLC |
| CPSE District   | Schenectady             |
| County          | SCHENECTADY             |

ICD Code(s) F80.0: Phonological disorder

Reason for Services

Agency/Provider Contact information

Name: PROGRESSUS THERAPY, LLC  
Address 1: 123 Main Street  
Address 2:  
City, State, Zip: Albany, NY, 12345  
Phone: 8885551111

Licensed Speech and Language Pathologist information

Name: Stark, Shannon  
NPI: 1003129438  
License: 010654

Digitally signed by:

Shannon Stark, M.A. CCC/SLP 01/14/2019  
Name Date

Unless another option is selected the default time period/term of service will autofill when the “Create Speech Recommendation” link is clicked.

This block of information fills in automatically when you click on the “Create Speech Recommendation” link.

This fills from the “Create Digital Order” Screen. This is one of the two fields that is entered by the SLP.

This block of information fills in from the Billing Provider Screen (My Account>Billing Provider Profile). If this is not filled in, the order cannot be created. This should be updated by the Agency.

This block of information fills in from the My Profile Screen (My Account>My Profile). If this is not filled in, the order cannot be created. Updated by the SLP.

The signature date fills in automatically when created.



# 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 Knowledge Base Links to Tutorials related to the Presentation

## ☐ The Webinar Recording & Presentation can also be accessed through the Knowledge Base using the link below:

- Knowledge Base Link: <http://support.cpseportal.com/Main/Default.aspx>

## ☐ Any questions can be sent to our CPSE Portal Support Team using the following link:

- CPSE Support Team Email: [support@CPSEPortal.com](mailto:support@CPSEPortal.com)