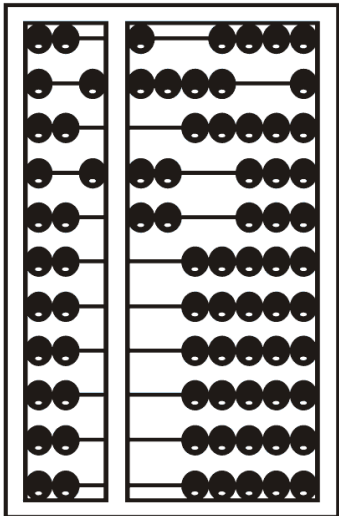


JAMES MCGUINNESS  
& ASSOCIATES INC.  
Consultants



# CPSE Portal Billing for Independent Providers

# Topics Covered

- \* Review of Credential Verification
- \* Creating a Voucher
  - \* What is an ESID
  - \* Voucher Terminology
- \* Missing Attendance
  - \* Why Doesn't Attendance Appear on my Voucher
  - \* Items Not Ready to Bill
  - \* Move Attendance Between Enrollments
- \* Submitting Vouchers
- \* Cannot Submit Voucher
  - \* Problems on Voucher
  - \* Problem of "Not Co-Signed"
- \* Print Voucher Summary
- \* Attendance Denied by County?
  - \* How to Correct and Re-Bill
- \* Reports
  - \* Voucher Listing Report
- \* Submitted Billing Questions



# **Review of Credential Verification**

# What is Credential Verification?

- \* A simple process to verify that the information about a Licensed Professional (OT, PT, SLP, OTA, PTA, LMSW, LCSW, etc.) is correctly entered in CPSE Portal.
- \* The individual's information that needs to be verified:
  - \* First Name, Last Name & Signature
  - \* Profession (OT, PT, SLP, ....),
  - \* License #,
  - \* Date of Licensure,
  - \* Date Registered Through
  - \* NPI #

# Credential Verification

- \* All providers licensed through the New York State Office of the Professions (Occupational Therapists, Physical Therapists, Licensed Clinical Social Workers, etc.) will need to have their credentials verified.
- \* Verification means that you will need to review what is on file with the Office of Professions and the NPI Registry to ensure that the information in the Portal is correct and attest that the information is correct.

# Credential Verification by Service Provider

- \* A service provider will log into the Portal, and see “REQUIRES VERIFICATION”.
- \* They will then need to Verify their credentials.

The screenshot shows the CPSE Portal interface. At the top, the logo 'CPSE PORTAL' is displayed. A greeting 'Hello, Betty . You are currently logged in' is visible in the top right. A navigation bar contains links: Home, Activities, Attendance, Caseload Maintenance, Lookup, Reports, My Account, and Knowledge Base. The main content area is divided into sections: 'User Profile' (with fields for Username: Betty, First Name: Betty, Last Name: Greene, and Email: lmell@jmcguinness.com), 'My Professional Profile' (with Name: Betty Greene and NPI: 1003017674), and 'My License(s)'. The 'My License(s)' section contains a table with columns: Profession, License, Original Date Of Licensure, Registered Through Date, License Lookup, Verification Status, and Verify. The first row shows 'Licensed Speech & Language Pathologist' with License '011587', Original Date '12/23/1999', Registered Through Date '01/31/2020', License Lookup 'Lookup', and Verification Status 'REQUIRES VERIFICATION'. The 'Verify' button in the last column is circled in red. Below the table is the 'My signature' section, showing a signature and the text 'Betty Greene CCC-SLP'. At the bottom, there is a link 'Edit My Profile'.

CPSE PORTAL

Hello, Betty . You are currently logged in

Home Activities Attendance Caseload Maintenance Lookup Reports My Account Knowledge Base

**User Profile** [Hide](#)

Username: **Betty**  
First Name: **Betty**  
Last Name: **Greene**  
Email: **lmell@jmcguinness.com**

[Edit User Account](#)

**My Professional Profile** [Hide](#)

Name: **Betty Greene**  
NPI: **1003017674 (BETTY GREENE)**

**My License(s)**

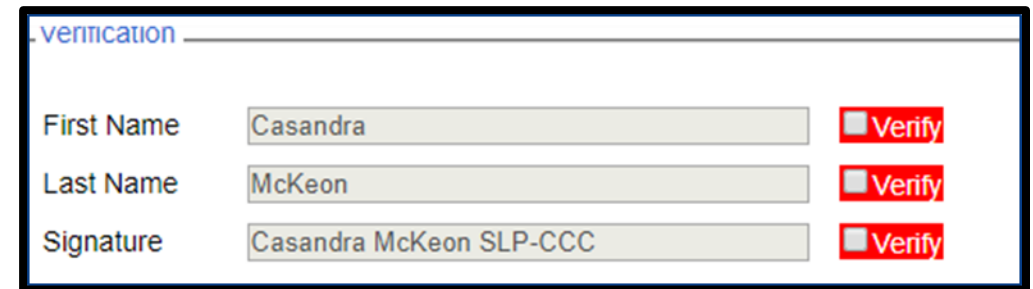
Profession	License	Original Date Of Licensure	Registered Through Date	License Lookup	Verification Status	Verify
Licensed Speech & Language Pathologist	011587	12/23/1999	01/31/2020	<a href="#">Lookup</a>	REQUIRES VERIFICATION	<a href="#">Verify</a>

**My signature**  
*Betty Greene CCC-SLP*  
Betty Greene CCC-SLP

[Edit My Profile](#)

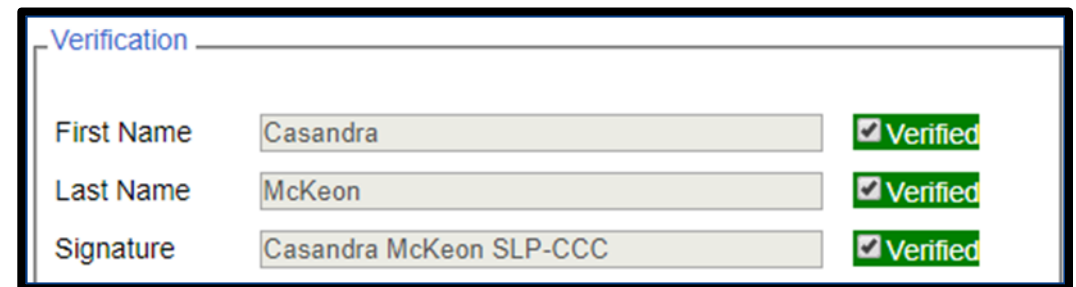
# Verifying Name

- \* Review First Name, if correct click “Verify”
- \* Review Last Name, if correct click “Verify”
- \* Review Signature, if correct click “Verify”
  
- \* After you click the red “verify” button, the status changes to green and says, “verified.”



A screenshot of a web form titled "Verification". It contains three input fields: "First Name" with the value "Casandra", "Last Name" with the value "McKeon", and "Signature" with the value "Casandra McKeon SLP-CCC". To the right of each input field is a red button with the text "Verify".

Verification		
First Name	Casandra	<input type="button" value="Verify"/>
Last Name	McKeon	<input type="button" value="Verify"/>
Signature	Casandra McKeon SLP-CCC	<input type="button" value="Verify"/>



A screenshot of the same "Verification" form after the buttons have been clicked. The buttons are now green and display a checkmark icon followed by the word "Verified".

Verification		
First Name	Casandra	<input checked="" type="button" value="Verified"/>
Last Name	McKeon	<input checked="" type="button" value="Verified"/>
Signature	Casandra McKeon SLP-CCC	<input checked="" type="button" value="Verified"/>

# Verifying License

- \* Compare the CPSE Portal information on left to NYS Office of the Professions on the right to verify that this is you.
- \* You can edit/update the License #, date of licensure and registered through date.
- \* You can also use the “Update Verification with SED Dates” to fill in those fields.

Verification

First Name	Casandra	<input checked="" type="checkbox"/> Verified
Last Name	McKeon	<input checked="" type="checkbox"/> Verified
Signature	Casandra McKeon SLP-CCC	<input checked="" type="checkbox"/> Verified
Profession	Licensed Speech & Language Pathologist	<input type="checkbox"/> Verify
License No	020673	<input type="button" value="Update"/> <input type="checkbox"/> Verify
Date Of Licensure	12/16/2010	<input type="button" value="Update"/> <input type="checkbox"/> Verify
Registered Through	4/30/2019	<input type="button" value="Update"/> <input type="checkbox"/> Verify

License Information From NYSED Office of the Professions

According to data retrieved on: 1/8/2019

Name: MCKEON CASANDRA PATRICIA Address: BALLSTON LAKE NY  
License: 020673 Profession: SPEECH - LANGUAGE PATHOLOGY  
Status: REGISTERED Date of Licensure: 12/16/2010 Registered Through: 04/19

[Update Verification with SED Dates](#)

NYSED.gov  
Office of the Professions

Search OP

Online Services

Verifications

Licensees, by name

Licensees, by license number

Permits, by name

Pharmacy Establishments

Professional Business Entities (other than pharmacies)

Help with Searches

Terms of Use

Registration Renewal

Renewal Information

Verification Searches

The information furnished at this web site is from the Office of Professions' official database and is updated daily, Monday through Friday. The Office of Professions considers this information to be a secure, primary source for license verification.

License Information \*

03/08/2021

Name : MCKEON CASANDRA PATRICIA  
Address : MECHANICVILLE NY  
Profession : SPEECH - LANGUAGE PATHOLOGY  
License No: 020673  
Date of Licensure : 12/16/2010  
Additional Qualification : Not applicable in this profession  
Status: REGISTERED  
Registered through last day of : 04/22

\* Use of this online verification service signifies that you have read and agree to the [terms and conditions of use](#). See [HELP glossary](#) for further explanations of terms used on this page.

\* Use your browser's back key to return to licensee list.





# Creating Vouchers

# What is an ESID

- \* ESID is the abbreviation for Electronic Service ID number. It is the number that identifies the child and the child's particular enrollment in the Portal.
- \* The CPSE Portal gives each County created enrollment a unique identifier called the ESID. This is how we reference enrollments.
- \* In order to be in compliance with HIPAA you should reference all preschool children by their ESID #, not their name. If you need to contact the help desk, you should **ALWAYS** reference the child's ESID #, and **NOT** the child's name.

# Voucher Terminology

## \* **Create Voucher:**

- \* The first step in creating a voucher is to enter its important information, including specifying the billing criteria that the voucher will contain (which county, enrollment type, and school year session).

## \* **Voucher Info:**

- \* Clicking the "Info" button will bring up the same screen as the "Create Voucher" button, but with the voucher's information pre-entered for you allowing you to edit some information.

## \* **Voucher Details:**

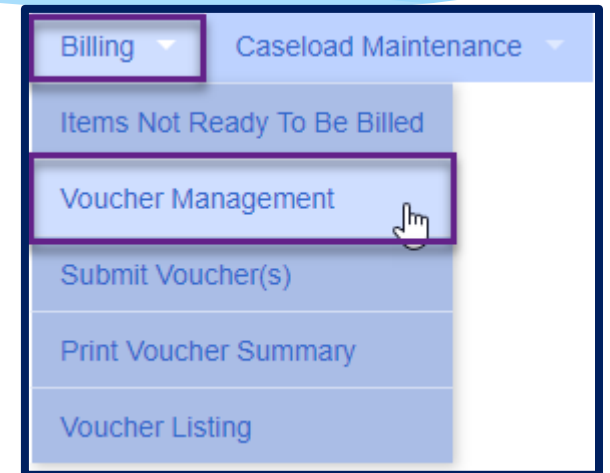
- \* This screen is used to add new monthly billing items (and their corresponding attendances) to a voucher, you use this screen. On the left are monthly items that are ready for billing, but not on any voucher yet. On the right are monthly items currently on this voucher. Note: Attendances won't be shown in the "Unassigned" grid until they are signed or co-signed, if applicable. Check which items you would like to move, the click either "Assign" or "Unassign", depending on what action you would like to take. The "Amount Billed" will update accordingly. These changes do not take effect until you click "Save".

## \* **Recalculation:**

- \* This screen introduces a concept known as recalculation of billing items. You can recalculate pending vouchers individually, or all of them at once. The recalculation process determines monthly billing amounts for any enrollments that match the criteria for the voucher contents. These billing items are summarized to a single item for the month. NOTE: Attendances must go through the recalculation and summarizing in order to be added to vouchers. It will also add any new attendances to a voucher if the enrollment month is already on the voucher.

# Creating a Voucher

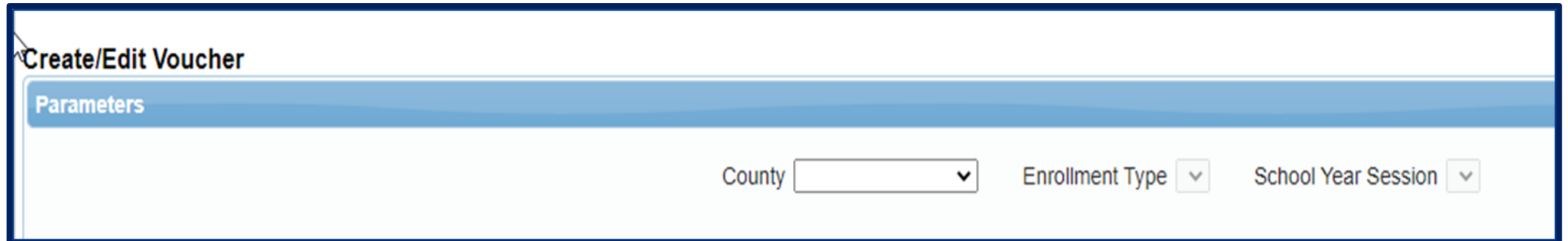
- \* When ready to bill, you will need to create your voucher.
- \* Go to **Billing -> Voucher Management**
- \* Click “Create Voucher”



<div>Recalc All Create Voucher</div>													
Pending Vouchers													
Voucher #	Vendor Invoice #	County Doc #	Bill Date	Service	County	Time Period	Description	Enroll. Count	Total Billed				
RS210310122341			3/10/2021	RS	Albany	2019 - 2020 Winter		0	\$0.00	Info	Details	Recalc	Delete

# Creating a Voucher

- \* Choose filter options for Parameters of voucher:
  - \* Select County
  - \* Select Enrollment (Service) Type
  - \* Select School Year Session



The screenshot shows a web form titled "Create/Edit Voucher". Below the title is a section labeled "Parameters" with a blue header. Inside this section, there are three dropdown menus: "County", "Enrollment Type", and "School Year Session". Each dropdown menu has a small downward arrow icon next to it.

# Creating a Voucher

- \* Once you select the previous filters, then the additional options will open up.

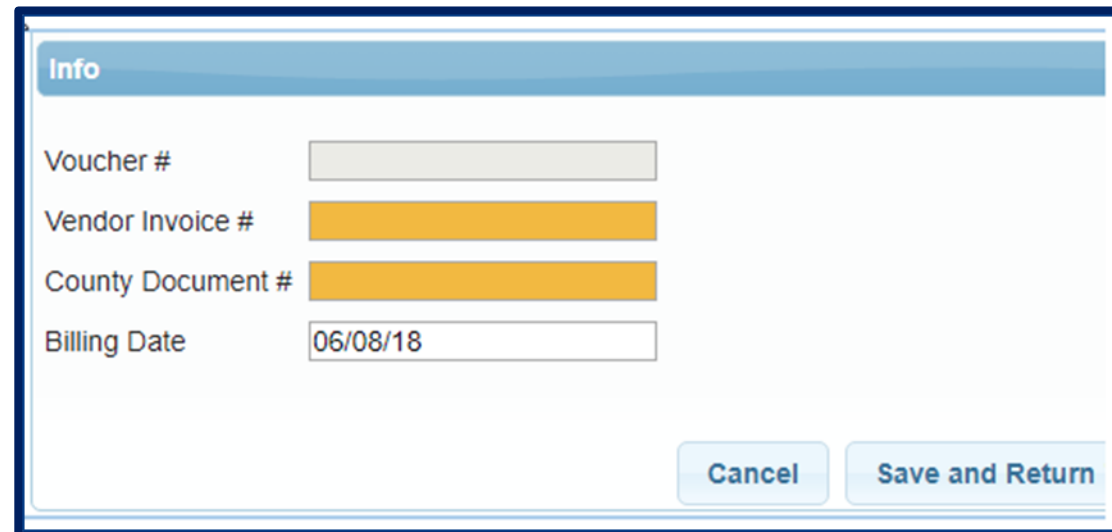
## Create/Edit Voucher

### Parameters

County	<input type="text" value="SCHENECTADY"/>	Enrollment Type	<input type="text" value="RS"/>	School Year Session	<input type="text" value="2019 - 2020 Winter"/>	Related Service Code	<input type="text"/>	SED Program Code	<input type="text"/>
		Service Month From		<input type="text"/>	Service Month To		<input type="text"/>		

# Creating a Voucher

- \* Voucher numbers are auto-assigned.
- \* The Vendor Invoice Number is how you as the Provider might identify your Voucher.
- \* The County Document # is how the County might identify your Voucher (for example a pre-printed County specific numbered Voucher).



Info

Voucher #

Vendor Invoice #

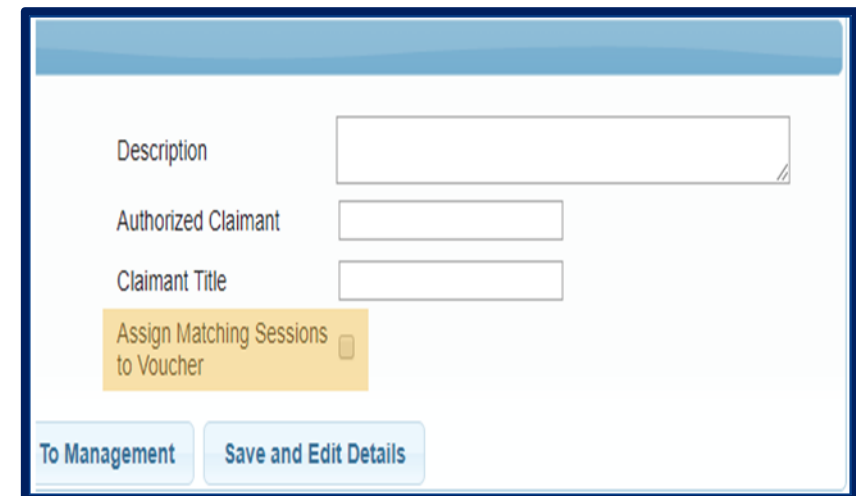
County Document #

Billing Date

Cancel Save and Return

# Creating a Voucher

- \* If you would like the system to automatically assign matches of the chosen criteria, check “Assign Matching Sessions”
- \* This can be used in place of choosing each individually.
- \* These may be unassigned if you do not wish to apply, this is just to skip a step in assigning attendances to a Voucher.
- \* The description is how you can identify the voucher (I.E. – May 2021 ST)
- \* Authorized Claimant – this is your name.
- \* Claimant Title – title of claimant
- \* Click Save and Return to Management

A screenshot of a web form for creating a voucher. The form has a light blue header bar. Below it, there are four input fields: 'Description' (a large text area), 'Authorized Claimant' (a single-line text box), 'Claimant Title' (a single-line text box), and 'Assign Matching Sessions to Voucher' (a checkbox). At the bottom of the form, there are two buttons: 'To Management' and 'Save and Edit Details'.



# Creating a Voucher

- \* When you create a voucher, a recalculation will occur and attendances matching the criteria will be marked for billing.
- \* Below is a screen shot of a completed created empty voucher.

**Create/Edit Voucher**

**Parameters**

County  Enrollment Type  School Year Session  Related Service Code  SED Program Code

Service Month From  Service Month To

**Info**

Voucher #

Vendor Invoice #

County Document #

Billing Date

Description

Authorized Claimant

Claimant Title

Assign Matching Sessions to Voucher ☒

Cancel

Save and Return To Management

Save and Edit Details

# Creating a Voucher

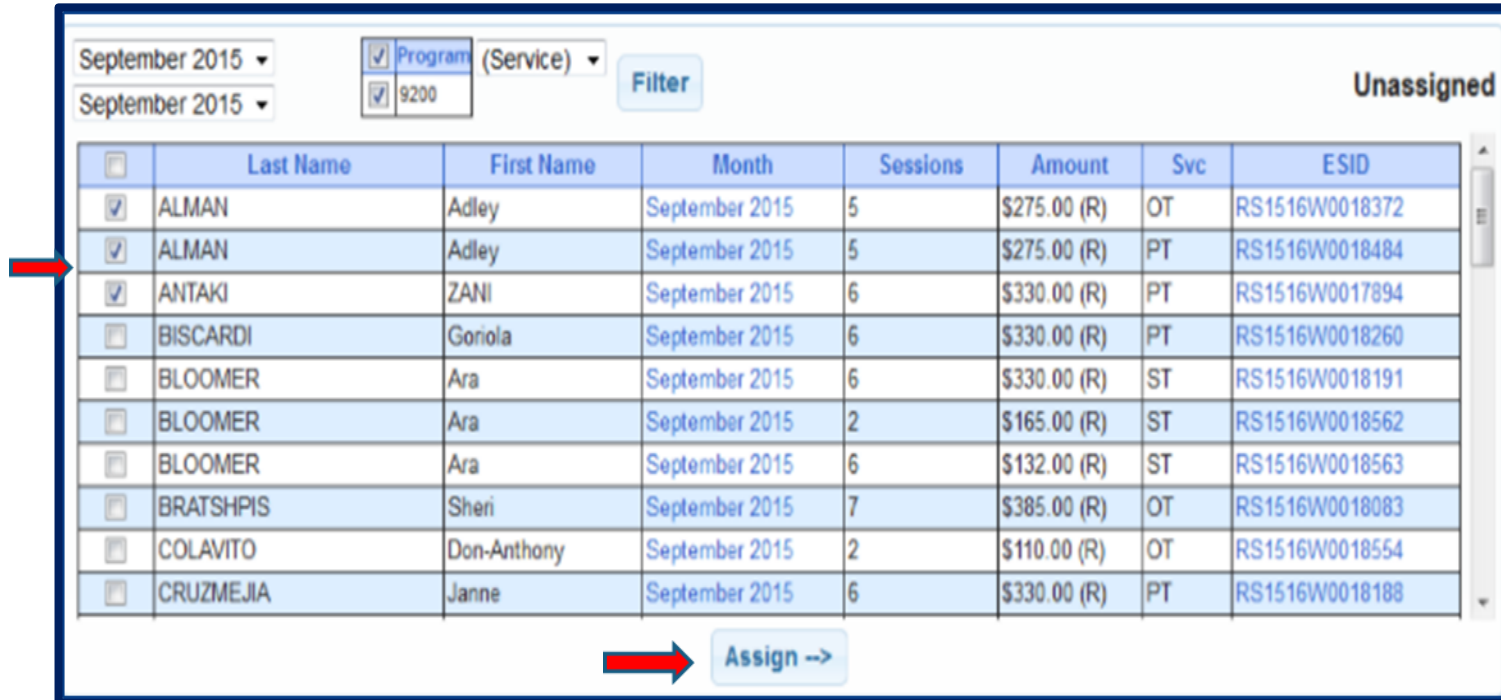
- \* After creating your voucher go to **Billing -> Voucher Management**
- \* This will bring up all pending vouchers waiting to be billed.
- \* Click on the Details of the voucher that you want to bill.



Pending Vouchers												
Voucher #	Vendor Invoice #	County Doc #	Bill Date	Service	County	Time Period	Description	Enroll. Count	Total Billed			
CB220613131			6/13/2022	CB	ULSTER	April 2022	April 1-1 Aide - Remaining	0	\$0.00	Info	Details	Recalc Delete
CB220613134			6/13/2022	CB	ULSTER	May 2022	Ulster - May CB 9100	0	\$0.00	Info	Details	Recalc Delete

# Creating a Voucher

- \* Assign applicable enrollment on left under "Unassigned" by checking each box or check the box at the top and all enrollments will highlight.
- \* Click "Assign"



September 2015 ▼ ☒ Program (Service) ▼ Filter

September 2015 ▼ ☒ 9200

Unassigned

<input type="checkbox"/>	Last Name	First Name	Month	Sessions	Amount	Svc	ESID
<input checked="" type="checkbox"/>	ALMAN	Adley	September 2015	5	\$275.00 (R)	OT	RS1516W0018372
<input checked="" type="checkbox"/>	ALMAN	Adley	September 2015	5	\$275.00 (R)	PT	RS1516W0018484
<input checked="" type="checkbox"/>	ANTAKI	ZANI	September 2015	6	\$330.00 (R)	PT	RS1516W0017894
<input type="checkbox"/>	BISCARDI	Goriola	September 2015	6	\$330.00 (R)	PT	RS1516W0018260
<input type="checkbox"/>	BLOOMER	Ara	September 2015	6	\$330.00 (R)	ST	RS1516W0018191
<input type="checkbox"/>	BLOOMER	Ara	September 2015	2	\$165.00 (R)	ST	RS1516W0018562
<input type="checkbox"/>	BLOOMER	Ara	September 2015	6	\$132.00 (R)	ST	RS1516W0018563
<input type="checkbox"/>	BRATSHPIS	Sheri	September 2015	7	\$385.00 (R)	OT	RS1516W0018083
<input type="checkbox"/>	COLAVITO	Don-Anthony	September 2015	2	\$110.00 (R)	OT	RS1516W0018554
<input type="checkbox"/>	CRUZMEJIA	Janne	September 2015	6	\$330.00 (R)	PT	RS1516W0018188

Assign -->

# Creating a Voucher

- \* Enrollments that were checked have now been moved to "Assigned" column.
- \* To remove an enrollment from the voucher, check the check box of applicable enrollment and click "Unassign".
- \* Click "Save"

Assigned						
<input type="checkbox"/>	Last Name	First Name	Service Month	Sessions	Amount Billed	ESID
<input type="checkbox"/>	ALMAN	Adley	September 2015	5	\$275.00 (R)	RS1516W0018372
<input type="checkbox"/>	ALMAN	Adley	September 2015	5	\$275.00 (R)	RS1516W0018484
<input type="checkbox"/>	ANTAKI	ZANI	September 2015	6	\$330.00 (R)	RS1516W0017894
<input type="checkbox"/>	DINH	Keysy	September 2015	5	\$275.00 (R)	RS1516W0018486
<input type="checkbox"/>	DINH	Keysy	September 2015	3	\$165.00 (R)	RS1516W0018507
<input type="checkbox"/>	EMANUEL	Zissel Devora	September 2015	3	\$165.00 (R)	RS1516W0018092
<input checked="" type="checkbox"/>	FUGATE	Keylen	September 2015	3	\$165.00 (R)	RS1516W0018105
<input type="checkbox"/>	GANGI	Quatese	September 2015	4	\$220.00 (R)	RS1516W0018581
<input type="checkbox"/>	GODOY	Nyla-Rae	September 2015	5	\$275.00 (R)	RS1516W0018142

<-- Unassign

# Creating a Voucher

- \* Anytime a new attendance is added to voucher details screen, a recalculation on the corresponding voucher is required in order to mark the attendance as ready for billing.
- \* Click “Recalc”
- \* New attendance is then automatically added to the voucher.
- \* Click “Save”





# Missing Attendance

# 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 use “Recalc”.
  - \* **The attendance is missing a Signed Date or Cosigned Date:**
    - \* Have the therapist/supervisor sign or co-sign the attendance.
  - \* **The attendance is on another Voucher:**
    - \* If the other voucher has not been submitted you can remove it from that voucher.
    - \* If the County denied that attendance on that other voucher, submit request to [support@CPSEPortal.com](mailto: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 on the right that reads "Rates" will show if there is anything there other than \$0.
  - \* **A prescription has not been uploaded to the enrollment**
    - \* A prescription must be uploaded and attached to an enrollment in the CPSE Portal.

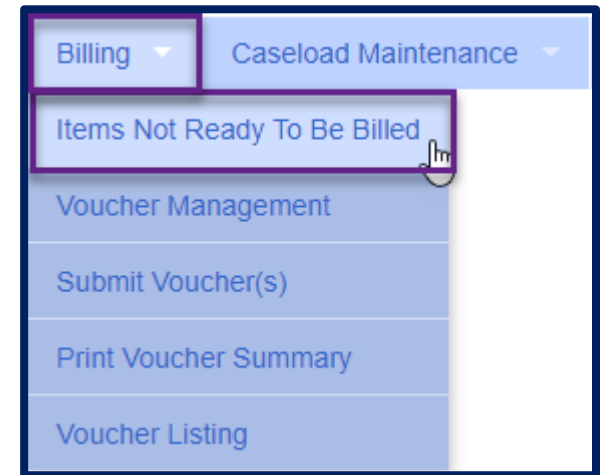
# Items Not Ready to Bill

- \* Another way to see why attendance doesn't appear on your voucher is to run an Items Not Ready to Bill Report.

- \* Go to **Billing -> Items Not Ready To Be Billed**

- \* This report will not show unmatched children or unmatched enrollments, but does show:

- \* Attendances missing signatures
- \* Attendances not co-signed
- \* Attendances outside of enrollment dates





# Items Not Ready to Bill

- \* Complete filters needed to sort attendances by provider, month or enrollment type.
- \* You will need to choose the county, as this report will sort attendances by the county and will not combine counties together.

**Items Not Ready To be Billed**  
**Filters**  
Provider:  County:  \*  
School Year Session:  Service Month From:  Service Month To:   
Enrollment Type:  Service Type:  Program Code:

# Items Not Ready to Bill

- \* On the Items Not Ready to Bill report there is a column labeled Problem. This will show the reason why the attendance cannot be billed at this time. Most often are:
  - \* Attendances Not Signed / Not Co-Signed
  - \* Attendances Outside of Enrollment Dates
  - \* Unmatched Child / Unmatched Enrollment
  - \* Rescinded

**Items Not Ready To be Billed**

Filters

Provider:

County:

School Year Session:

Service Month From:

Service Month To:

Enrollment Type:

Service Type:

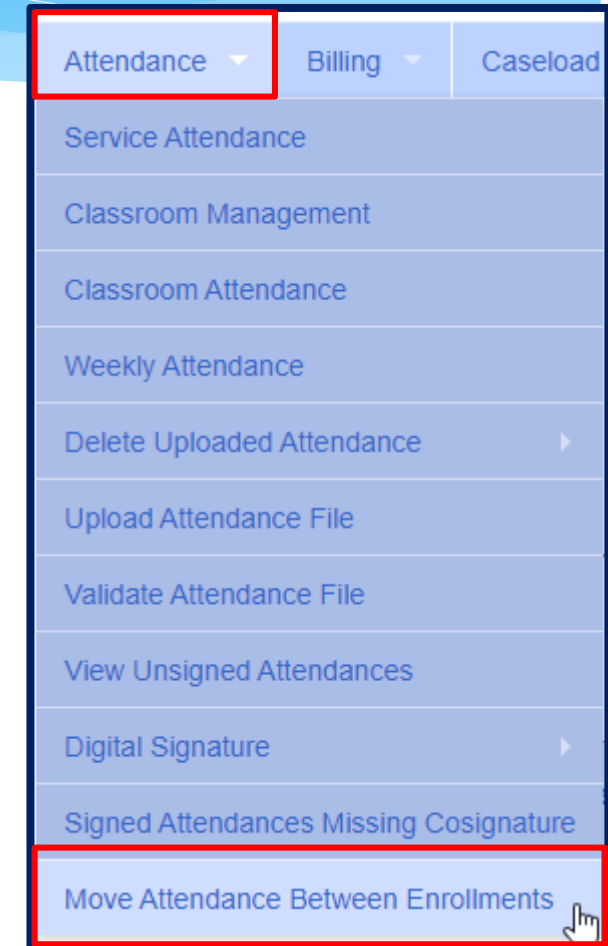
Program Code:

Retrieve

Last Name	First Name	ServiceProvider	DOB	ESID	From	To	Month	Service Dates	Problem	ServiceType	Frequency	Sessions	Amount	
CHERRY	YONG	HOFFMAN, KRISTEN	04/15/15	RS1920W0015042	11/20/19	06/26/20	Mar 2020	3/4, 3/11	Not signed	ST1 (Grp)	1x30	2.00	\$103.00	<a href="#">Attendances</a>
CHERRY	YONG	HOFFMAN, KRISTEN	04/15/15	RS1920W0015043	11/20/19	06/26/20	Mar 2020	3/2, 3/6, 3/9	Not signed	ST (Indv)	1x30	3.00	\$154.50	<a href="#">Attendances</a>

# Move Attendance Between Enrollments

- \* If attendances have been entered on the wrong enrollment, then they can be moved from one enrollment to another without the service provider having to recreate the attendances.
- \* In order to move the attendances, they **cannot** be on a voucher.
- \* Go to **Attendance -> Move Attendances Between Enrollments**.



# Move Attendance Between Enrollments

- \* Filter the School Year, Provider & Last Name of the child.
- \* This will pull up all enrollments for the child for the school year chosen.

Move Attendance Between Enrollments

School Year Session  Provider  Last Name

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	ST	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	OT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	PT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009574			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009573			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CBRS2122W0035916			CBRS	9/8/2021	12/17/2021	ST	3x30	I	Select

# Move Attendance Between Enrollments

- \* Select Enrollment by clicking “Select” to the Right.
- \* Check correct attendances boxes on left,
- \* Click on “Select” on right for applicable enrollment,
- \* Click on “Move” to move attendance to the other enrollment,
- \* You will the confirmation: *Attendances Moved Successfully.*

Move Attendance Between Enrollments

School Year Session: 2021 - 2022 Winter | Provider: | Last Name: | Search

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	ST	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	OT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD					RS	9/7/2021	6/24/2022	PT	3x30	I	Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009574			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CB2122W0009573			CB	9/8/2021	12/17/2021		5 hrs/day		Select
2021 - 2022 Winter	ULSTER	KINGSTON CITY SD		CBRS2122W0035916			CBRS	9/8/2021	12/17/2021	ST	3x30	I	Select
2021 - 2022	ULSTER	KINGSTON CITY											

**Selected Enrollment Info**

	Service Date	Service Provider	Individual Or Group
<input type="checkbox"/>	12/2/2021		I
<input type="checkbox"/>	12/6/2021		I
<input type="checkbox"/>	12/9/2021		I
<input type="checkbox"/>	12/20/2021		I
<input type="checkbox"/>	12/21/2021		I

	County	District	ESID	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group
Select	ULSTER	KINGSTON CITY SD		RS	9/7/2021	6/24/2022	ST	3x30	I
Select	ULSTER	KINGSTON CITY SD	CBRS2122W0036246	CBRS	12/18/2021	6/23/2022	ST	3x30	I

Move



# Submitting Vouchers

# Submitting a Voucher

- \* To submit voucher(s) to county, go to **Billing** -> **Submit Voucher(s)**.
- \* Select unbilled voucher by checking box (or Select All).



Submit voucher(s) for ULSTER county (unbilled CB vouchers).

ULSTER    CB

Select any Unbilled Vouchers

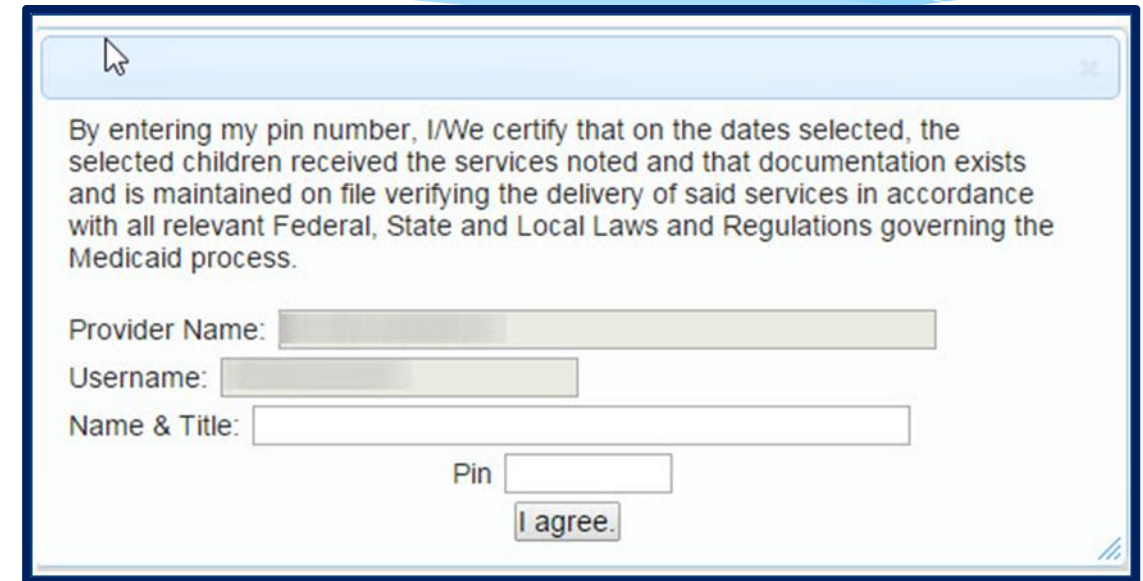
Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed	
<input checked="" type="checkbox"/>	1/11/2022	CB220111104807							18	\$52,452.00	

☒ Select All    Total Billed: \$52,452.00

Submit Voucher(s)

# Submitting a Voucher

- \* After clicking "Submit Voucher(s)" - You will then get the screen on the right.
- \* Enter your personal PIN – Click "I Agree".
- \* You will get "Voucher Submitted Successfully" confirmation message at the top of the page.
- \* The voucher summary should pop up automatically upon submission. If for some reason it does not, continue with the following instruction on how to "Print Voucher Summary".


A screenshot of a web application window showing a confirmation screen. At the top, a mouse cursor points to a close button. Below is a paragraph of text: "By entering my pin number, I/We certify that on the dates selected, the selected children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process." Below this text are four input fields: "Provider Name:" (a long text box), "Username:" (a medium text box), "Name & Title:" (a long text box), and "Pin" (a small text box). Below the "Pin" field is a button labeled "I agree." in the bottom right corner.

**NOTE:** Once you submit a voucher to the county, it is **NO** longer possible to edit its contents. Should you need to make a change to your submitted voucher, you can go to **Billing -> Voucher Listing** to see if the county has downloaded your voucher. If the county has not downloaded the voucher then you can click "Un-Submit", and retrieve the voucher for corrections and resubmit. If the county has downloaded the voucher, the "Un-Submit" button will not be available to you.



# Voucher Summary

- \* Sign the voucher summary, and send to County .

**PORTAL**

**Voucher Summary**

Printed: 6/17/2021 2:13:30 PM

Page 1 of 1

**Provider:** GEBAUER,BETTY

**Vendor#:** 02061

**Tax ID:**

**BEDS Code:**

**Voucher Description:** July 2019

**Bill Date:** 8/4/2019

**Submitted :** 8/19/19 04:09 PM

**Time Period:** 2019 - 2020 Summer

**County:** SCHENECTADY

**CPSE Voucher#:** RS190804113625

**Vendor Invoice#:**

**County Doc#:**

**Contract Or Account#:**

Child Name	ESID	Frequency	Service	Dates Of Service	Rate	Units	Minutes Per Unit	Amount
HARRIS, RUBEN	RS1920S0014606	2x30 - I	RS - ST	Jul 2019 - 3, 16, 18, 23, 25, 30	\$51.50	6.00	30	\$309.00
WINTERS, LEANORA	RS1920S0014666	2x30 - I	RS - ST	Jul 2019 - 2, 16, 18, 25, 30	\$51.50	5.00	30	\$257.50
WOLFF, JOSUE	RS1920S0014564	1x30 - G	RS - ST1	Jul 2019 - 2, 18, 25	\$51.50	3.00	30	\$154.50
WOLFF, JOSUE	RS1920S0014563	1x30 - I	RS - ST	Jul 2019 - 3, 16, 24, 30	\$51.50	4.00	30	\$206.00
<b>Grand Total:</b>								<b>\$927.00</b>

I certify that on the dates above, the above named child received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

**Authorized Signature:** \_\_\_\_\_


**Certification:** \_\_\_\_\_



# Cannot Submit Voucher




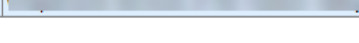
# Problems on Voucher

- \* If you cannot submit a voucher do to **Problems on Voucher** – click View Problems.

Submit voucher(s) for  county (unbilled CBRS vouchers).

Select any Unbilled Vouchers

Select	Bill Date	Voucher#	Vendor Invoice#	County Document#	Contract or Account#	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed	
<input type="checkbox"/>	9/9/2021	CBRS210909085058	CBRS210909085058			July and August 2021 - CBRS			79	\$0.00	<a href="#">Problems on Voucher</a> <a href="#">View Problems</a>
<input type="checkbox"/>	10/27/2021	CBRS211027112902	CBRS211027112902			September 2021 - CBRS Preschool			42	\$0.00	<a href="#">Problems on Voucher</a> <a href="#">View Problems</a>
<input type="checkbox"/>	11/17/2021	CBRS211117085942	CBRS211117085942			October 2021 - CBRS Preschool			55	\$0.00	<a href="#">Problems on Voucher</a> <a href="#">View Problems</a>
<input checked="" type="checkbox"/>	12/14/2021	CBRS211214143201	CBRS211214143201			November 2021 - CBRS Preschool			54	\$0.00	

☒ Select All    Total Billed: \$0.00

Submit Voucher(s)

# Problems on Voucher – View Problems

- \* Under the *Problem* column you can see what the problem is.
- \* Click on *Attendances* to see which attendances have an issue.

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
		CBRS2122S00:	7/5/2021	8/16/2021	OT (Indv)	1x30	Missing image of Prescription/order for enrollment	<a href="#">Attendances</a>
		CBRS2122S00:	7/6/2021	8/16/2021	TVI (Indv)	1x60	Missing Service Location	<a href="#">Attendances</a>
		CBRS2122S00:	7/5/2021	8/16/2021	OT (Indv)	2x30	Details of Prescription/order not entered for enrollment	<a href="#">Attendances</a>
		CBRS2122S00:	7/5/2021	8/13/2021	ST (Indv)	3x30	Missing a full diagnosis (ICD) code	<a href="#">Attendances</a>

# Attendance Issue

- \* Any attendances having an issue will appear in red.
- \* You can view the session note / treatment log.
- \* Child must be removed from voucher before therapist can, unsign, correct and resign 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 #	
07/07/21	Provided Treatment Session			2:00 PM	2:30 PM	30	1.00	30		Therapy Room I	I	07/08/21	07/08/21	CBRS210909085058	Treatment Log
07/08/21	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30		Therapy Room I	I	07/08/21	07/08/21	CBRS210909085058	Treatment Log
07/12/21	Provided Treatment Session			11:00 AM	11:30 AM	30	1.00	30		Therapy Room I	I	07/16/21	07/16/21	CBRS210909085058	Treatment Log
07/14/21	Provided Treatment Session			2:00 PM	2:30 PM	30	1.00	30		Therapy Room I	I	04/25/22	04/25/22	CBRS210909085058	Treatment Log
07/15/21	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30		Therapy Room I	I	04/25/22	04/25/22	CBRS210909085058	Treatment Log
07/19/21	Provided Treatment Session			11:00 AM	11:30 AM	30	1.00	30		Therapy Room I	I	04/25/22	04/25/22	CBRS210909085058	Treatment Log
07/21/21	Provided Treatment Session			1:30 PM	2:00 PM	30	1.00	30		Therapy Room I	I	07/23/21	07/23/21	CBRS210909085058	Treatment Log
07/22/21	Provided Treatment Session			12:30 PM	1:00 PM	30	1.00	30		Therapy Room I	I	04/25/22	04/25/22	CBRS210909085058	Treatment Log

# Missing Prescriptions

- \* When submitting the voucher, you may have a problem of:
  - \* Details of Prescription/order not entered for enrollment – ***You will need to enter the prescription and upload the image of the prescription.***
  - \* Missing image of Prescription/order for enrollment – ***You have entered the details of the prescription, but you have not uploaded the image of the prescription.***

Last Name	First Name	ESID	From Date	To Date	Service	Frequency	Problem	
			12/16/2021	6/23/2022	OT (Indv)	2x30	Missing a full diagnosis (ICD) code	Attendances
			9/8/2021	6/23/2022	OT (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances
			2/22/2022	6/23/2022	OT (Indv)	2x30	Missing a full diagnosis (ICD) code	Attendances
			12/18/2021	6/23/2022	ST (Indv)	3x30	Details of Prescription/order not entered for enrollment	Attendances
			12/18/2021	6/23/2022	OT (Indv)	3x30	Details of Prescription/order not entered for enrollment	Attendances
			12/18/2021	6/23/2022	PT (Indv)	3x30	Details of Prescription/order not entered for enrollment	Attendances
			1/3/2022	6/23/2022	OT (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances
			4/4/2022	6/23/2022	ST (Indv)	2x30	Missing image of Prescription/order for enrollment	Attendances
			4/4/2022	6/23/2022	OT (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances
			9/8/2021	6/23/2022	OT (Indv)	2x30	Details of Prescription/order not entered for enrollment	Attendances
			9/8/2021	6/23/2022	ST (Indv)	3x30	Missing image of Prescription/order for enrollment	Attendances



# Print Voucher Summary

# Print Voucher Summary

\* Go to **Billing** -> **Print Voucher Summary**





# Print Voucher Summary

- \* Complete filters if needed to find a specific voucher.
- \* Click "*Print*" link for applicable voucher

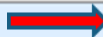
Home	File Transfer ▾	Activities ▾	Attendance ▾	Billing ▾	Caseload Maintenance ▾	Lookup ▾	Documents ▾	Reports ▾	Medicaid ▾	People ▾	My Account ▾	Knowledge Base
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## Print Voucher Summary Reports

Filter By... \_\_\_\_\_


School Year Session: (All School Year Sessions) ▾ Enrollment Type: (All Enrollment Types) ▾ County: (All Billed Counties) ▾ Billing Month: (All Billing Months) ▾ Service Month: (All Service Months) ▾ Voucher Status: (Any Voucher Status) ▾

Apply Filter

Voucher #	Enrollment Type	Description	Billing Date	Total Billed	Submitted Date	Claimant Title	Authorized Claimant	Destination County	# Enrollments	Print All Voucher Submission Reports
RS200308133551	RS	FEB. 2020	3/8/2020	\$4,261.50	3/8/2020	CCC-SLP	Betty P. Gebauer	SCHENECTADY	22	<a href="#">Print</a>
RS200308133622	RS	FEBRUARY 2020	3/8/2020	\$2,926.00	3/8/2020	CCC-SLP	Betty P. Gebauer	Albany	11	 <a href="#">Print</a>
RS200213143706	RS	JAN. 2020	2/13/2020	\$3,993.00	2/14/2020	CCC-SLP	Betty P. Gebauer	Albany	10	<a href="#">Print</a>
RS200205073831	RS	JAN. 2020	2/5/2020	\$5,620.50	2/9/2020	CCC-SLP	Betty P. Gebauer	SCHENECTADY	22	<a href="#">Print</a>
RS200102193725	RS	DEC. 2019	1/2/2020	\$2,486.00	1/4/2020	CCC-SLP	Betty P. Gebauer	Albany	9	<a href="#">Print</a>

# Print Voucher Summary

\* You will then see voucher summary:

**PORTAL**

**Voucher Summary**

Printed: 6/17/2021 2:13:30 PM

Page 1 of 1

**Provider:** GEBAUER,BETTY

**County:** SCHENECTADY

**Vendor#:** 02061

**Bill Date:** 8/4/2019

**CPSE Voucher#:** RS190804113625

**Tax ID:**

**Submitted :** 8/19/19 04:09 PM

**Vendor Invoice#:**

**BEDS Code:**

**Time Period:** 2019 - 2020 Summer

**County Doc#:**

**Voucher Description:** July 2019

**Contract Or Account#:**

I certify that on the dates above, the above named child received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

**Authorized Signature:** \_\_\_\_\_**Certification:** \_\_\_\_\_

# Print Voucher Summary

- \* Depending on your browser and set up for reading Adobe PDF documents you should see icons for saving and printing - Click "Print" icon to print summary:





# **Attendance Denied by County?**

# How to Correct and Re-Bill

- \* You **MUST** confirm that the attendances have been denied by the county, and that you understand the removal is permanent.
- \* If a provider makes a mistake and submits the erroneous data on a voucher, the County may choose to deny payment for certain dates of service.
- \* If this occurs, and the provider would like to attempt to correct the data and resubmit on a new voucher, the process is as follows:
  - \* The denied attendance needs to be removed from the initial voucher. To do this, you must inform the CPSE Portal support team of the ESID and service dates that you would like removed. To do this, complete the below form and email it to **support@cpseportal.com**
    - \* **RequestToHaveAttendanceRemovedFromSubmittedVouchers.xlsx**

# How to Correct and Re-Bill

\* Example of form:

	A	B	C	D	E	F
1	<i>Complete the form below to request attendance entries to be removed from vouchers so they can</i>					
2	<i>be corrected and rebilled on a new voucher</i>					
3						
4	County					
5	Billing Provider Name					
6						
	Electronid Service ID (ESID)	Date of Service				
7	(*Child's, not Voucher #*)	(Date Needing to be Removed)				
8						
9						
10						
11						
12						

IMG1: Example of form to be completed

# How to Correct and Re-Bill

- \* Once the attendance is no longer on a voucher:
  - \* If you need to modify the treatment log:
    - \* Since the attendance has already been digitally signed attesting to the fact that everything was reviewed and correct, you must first unsign the attendance and indicate why you need to modify the signed treatment log. Here are instructions for unsigning attendance: <http://support.cpseportal.com/kb/a33/unsigned-attendance.aspx>
    - \* Once the attendance entry has been unsigned, it can now be modified.
    - \* The modified attendance entry needs to be **resigned**.
  - \* If the attendance needs to be moved to a different ESID because the original enrollment dates changed, was rescinded or attendance was entered on the wrong enrollment, here are the instructions:
    - \* <http://support.cpseportal.com/kb/a53/move-attendance-between-enrollments.aspx>
  - \* The attendance can be added to a new voucher and submitted. If the attendance is not appearing, make sure you do a “**recalc**” on the voucher.

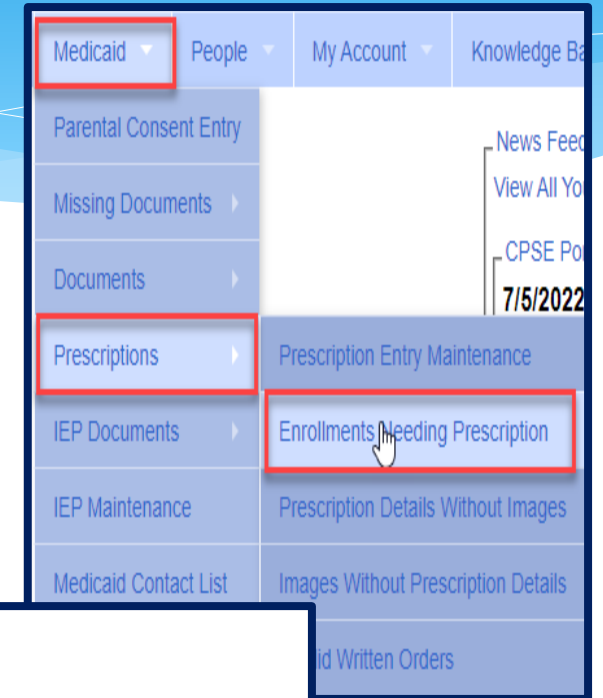


# Reports



# Missing Prescriptions Report

- \* Go to **Medicaid -> Prescriptions -> Enrollments Needing Prescription**.
- \* You can filter the school year and the county.
- \* On this page you can: 1) Add New RX 2) Assign To Existing RX 3) Upload Image



## Enrollments Missing Prescription

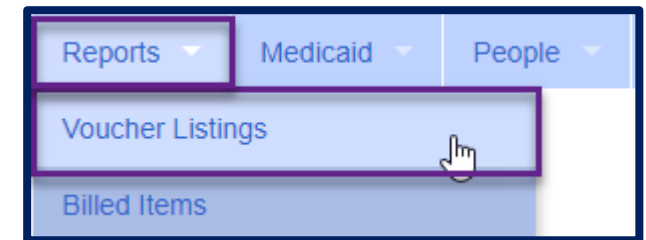
Filters

School Year Session  County  Provider

ESID	Child Name	From - To	RS	Frequency			
CPSECBRS0000120449		07/04/2022 - 08/12/2022	OT	1x30	Add New Rx	Assign To Existing Rx	Upload Image
CPSECBRS0000120450		07/04/2022 - 08/12/2022	OT1	1x30	Add New Rx	Assign To Existing Rx	Upload Image
CPSECBRS0000120451		07/04/2022 - 08/12/2022	PT	3x30	Add New Rx	Assign To Existing Rx	Upload Image
CBRS2223S0036334		07/04/2022 - 08/12/2022	CSL	1x30	Add New Rx	Assign To Existing Rx	Upload Image

# Voucher Listing Report

- \* To see all Vouchers that have been submitted to the county, you can run a Voucher Listing Report.
- \* Go to **Reports -> Voucher Listings**
- \* Enter Criteria, and choose how you want to sort your report.

A screenshot of a form titled 'Select Report Criteria'. It contains four input fields: 'School Year:' with a dropdown arrow, 'Service Type:' with a dropdown arrow, 'From Date:' with a text box, and 'To Date:' with a text box.A screenshot of a form titled 'Sort Report'. It has a 'Sort By:' dropdown menu with a list of options: 'NumEnrollments', 'BillingDate', 'VoucherNumber', 'VoucherDescription', 'CountyName', 'TotalBilled', and 'NumEnrollments' (which is highlighted in blue). To the right of the dropdown is a checkbox labeled 'Descending?'.

# Voucher Listing Report

- \* Your report will look like the screenshot below.
- \* You can download or print this report for your records.

CP  
SE PORTAL

Voucher Listings

Printed: 7/2/2021 3:18:00 PM

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**Report Criteria: School Year: 201819 Service Type: RS Sorted By: NumEnrollments Ascending**

Voucher Number	Voucher Description	County Name	Billing Date	# Enrollments	Total Billed
RS190416194659	March 2019/Quinn	SCHENECTADY	4/16/2019	1	\$268.00
RS180805085528	July 2018	SCHENECTADY	8/5/2018	2	\$450.00
RS180819200723	August 2018	SCHENECTADY	8/19/2018	2	\$400.00
RS180819204244	July 2018	Albany	8/19/2018	4	\$1,100.00
RS180820185858	August 2018	Albany	8/20/2018	4	\$605.00
RS181010190803	September 2018	Albany	10/10/2018	6	\$1,870.00
RS181112190013	October 2018	Albany	11/12/2018	6	\$2,750.00
RS181208181032	November 2018	Albany	12/8/2018	7	\$2,365.00
RS190106124044	DECEMBER 2018	Albany	1/6/2019	7	\$2,090.00



# ***Billing Questions from Previous Webinars***

# Submitted Billing Questions

- \* **Where do we get the form to request attendance removed?**
  - \* Below is the link to a knowledge base article that includes this form:  
<http://support.cpseportal.com/kb/a81/attendance-denied-how-to-remove-in-order-to-correct-and-rebill.aspx?KBSearchID=17204>
- \* **Do we create a rebill voucher or add it to the subsequent month's bill?**
  - \* Yes, you would need to create another voucher for any rebills.
- \* **For summer billing, should we bill for July and August separately, or can we submit one bill for the entire summer in August?**
  - \* The Portal will allow you to bill for 2 months together (just be sure to filter for the correct time period). This is County specific, please check with the County to see what the billing requirements are.

# Submitted Billing Questions

- \* **Do we wait until the end of the month to start creating a voucher or can we add to the voucher for the month on a daily basis?**
  - \* *We would recommend waiting until the end of the month, or you would have to do a “Recalc” each time a change is made to the voucher.*
- \* **Can services be billed on an unmatched record?**
  - \* *No, you cannot bill on an unmatched record. The agency or Independent Provider should check for any potential matches frequently in order to bill at the end of the month.*

# Submitted Billing Questions

- \* **If I am an individual contractor, do I need to send 2 vouchers? I am currently seeing them at home for the summer.**
  - \* *No, all summer services can be added to a single voucher. An Independent service provider will never have a CB or CBRS voucher as only an Agency is approved to run classrooms.*
- \* **How are you notified if an attendance is denied?**
  - \* *The County will notify you.*

# Helpful Knowledge Base Articles

- \* Credential verification by individual with login:
  - \* <http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx?KBSearchID=16524>
- \* Creating and Submitting a Voucher
  - \* <http://support.cpseportal.com/kb/a62/creating-and-submitting-a-voucher.aspx?KBSearchID=17204>
- \* Why doesn't attendance appear to be put on a voucher?
  - \* <http://support.cpseportal.com/kb/a92/why-doesnt-attendance-appear-to-be-put-on-a-voucher.aspx?KBSearchID=17204>
- \* Attendance Denied? How to Remove in Order to Correct and Re-Bill
  - \* <http://support.cpseportal.com/kb/a81/attendance-denied-how-to-remove-in-order-to-correct-and-re-bill.aspx?KBSearchID=17204>
- \* How to Submit a Ticket to the CPSE Portal
  - \* <http://support.cpseportal.com/kb/a188/how-to-submit-a-ticket-to-the-cpse-portal.aspx?KBSearchID=17204>



# Closing Remarks

- \* CPSE Portal Address (you may want to bookmark):  
<https://www.cpseportal.com>
- \* In addition to the Portal Knowledge Base, our Helpdesk is available through email at [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
  - \* When sending an email:
    - \* Do **not** use child's name
    - \* Use ESID #, Child # or STAC ID #
    - \* Include your county, and info needed