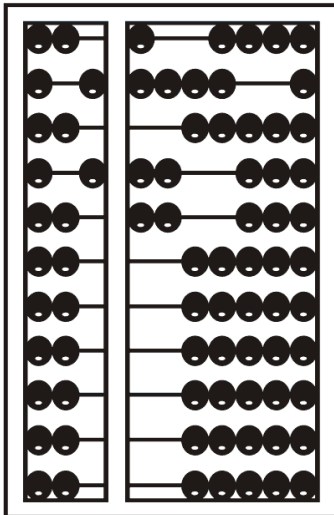


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



Welcome to Full-Service
Medicaid with
James McGuinness &
Associates, Inc.

INTRODUCTIONS

Who will you be working with at McGuinness?

- Deborah Frank, McGuinness Medicaid Specialist
- Kelly Knowles, Sullivan County Medicaid Support

WHAT IS THE PURPOSE OF THIS WEBINAR?

- ❑ This is not a training.

- ❑ We are looking to:
 - Provide you with an introduction to the upcoming expectations/requirements
 - Share a timeline for the implementation process
 - Let you know what you can do to ensure a smooth transition

FULL-SERVICE MEDICAID ANNOUNCEMENT

- James McGuinness and Associates will be working with Sullivan County as their Medicaid Contractor/Claiming Agent.
- All providers should have received an email from the County explaining that McGuinness will be handling Medicaid claiming/billing for Sullivan County for service dates beginning **July 1, 2022**.
- Along with the email providers should have also received a **New Implementation Guide for Full-Service Medicaid**, which delineates the CPSE Portal Medicaid requirements and expectations for the Sullivan County Provider.

ANNOUNCEMENT EMAIL & FSM GUIDE

Full Service Medicaid Announcement

Dear Providers:

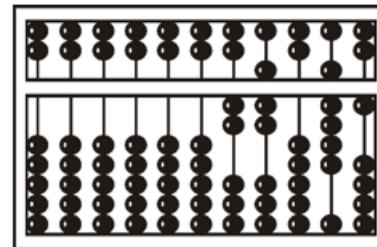
Sullivan County is responsible for ensuring that all Medicaid-eligible CPSE billing is in-compliance with the State Education Department and the County rules and regulations. Accordingly, Sullivan County has secured a contract with James McGuinness and Associates, Inc. to be the county's Medicaid contractor/claiming agent.

McGuinness will be responsible for Medicaid claiming for service dates back to **July 1, 2022**. This means you (the provider) will need to ensure that you have uploaded a prescription to the CPSE Portal (for the summer and 10-month sessions) before you can bill the county.

Attached to this email is a ***McGuinness Full-Service Medicaid New Implementation Guide for Providers***. Please review this document as it will help you to understand the expectations moving forward. Some of the key areas that involve critical Medicaid compliance elements are noted below:

- Billing Requirements (*CBRS & Prescriptions*)
- Enrollment Information (*to address contemporaneous documentation*)
- Credential Verification/NPI Numbers (*Required for billing*)
- Medicaid Documentation (*Uploading, Verification, Missing*)
- You can find a more detailed description of these requirements in the [*New Implementation Guide*](#) on page 1, [*CPSE Portal Medicaid Section*](#).

Full Service Medicaid Implementation Guide



JAMES McGUINNESS
& ASSOCIATES INC.
Consultants

**MCGUINNESS FULL-SERVICE MEDICAID
New Implementation Guide for Providers**

WHAT WILL SULLIVAN COUNTY EXPECT FROM PROVIDERS? For Prescriptions

□ County Expectations for **Prescriptions**:

- The County is expecting providers to upload Prescriptions to the Portal for **ALL** children – **Not just Medicaid children.**
- *Agency Service Providers & Independent Providers* will be expected to **review** and **upload** prescriptions for services beginning with **July 1, 2022** service dates. (A webinar training has been scheduled to walk through the prescription upload process (**1/10/23**)).

*This means reviewing the prescription for the eight required elements for a Medicaid prescription prior to uploading the prescription (The Medicaid elements can be found on Page 21 of the Medicaid Handbook - link below.). The upcoming webinar on Medicaid-Compliant Written Orders (**1/12/23**) will explain in detail how to review prescriptions for Medicaid compliance.*

WHAT WILL SULLIVAN COUNTY EXPECT FROM PROVIDERS? For Prescriptions

□ County Expectations for **Prescriptions** *(Continued)*

- Effective **July 1, 2022** providers will not be able to submit billing for services that do not have an uploaded prescription.
- Effective **July 1, 2022**, the county expects SLPs to use the **Digital Speech Recommendation** feature in the Portal for all **new children** or **changes in service**. (A *webinar training has been scheduled to walk through this process on 1/18/23.*)

WHAT WILL SULLIVAN COUNTY EXPECT FROM PROVIDERS? For Prescriptions

□ County Expectations for **Prescriptions** (Continued)

- Effective **July 1, 2022**, providers will use a **new prescription template** for **all** services except Speech.
- SLPs are expected to complete a digital recommendation in the Portal for all speech enrollments – even if a doctor writes a prescription.

2022-23 SULLIVAN PRESCRIPTION TEMPLATES

PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided as specified in the Individualized Education Program (IEP) designed by the Committee. (Check one or both as required.) Evaluation Services

Student Name	DOB
District	County
Agency	(Name of Agency, Center-based Program or Individual Provider / Phone)

(Check One)
Reason for Rx: Annual Review Meeting Change in Service Transfer Meeting Re-Eval Meeting New Referral

(REQUIRED) Term of Service: School Year July 1, 20 to June 30, 20 (Frequency, Duration & Class Ratio as per the IEP)			
(Please type in the last two digits of the school year. Format YYYY.)			
Evaluation/Service	(REQUIRED) ICD CODE for EVALUATION(S)	(REQUIRED) ICD CODE for SERVICE(S) *	Medical Diagnosis/Purpose of Treatment
Audiological			
Occupational Therapy			
Physical Therapy			
Speech			
Psychological/Psychological Counseling			
Skilled Nursing (Requires a Physician's Order)			

*The most specific ICD code is required for each evaluation/service.
Medicaid requires that a written referral be in place prior to the initiation of evaluations/services.*

* An order/referral for services must be completed for each IEP period.
A new order/referral must be completed whenever reviews conducted during an IEP period results in a change in service (i.e., frequency/duration/class size).

Signature	Date Signed
(Original Signature Required – Stamps Not Permitted)	(Required)
Print Name	Title

Address (REQUIRED) - (Stamp Accepted)	(REQUIRED) License #
	(REQUIRED) NPI #
	Medicaid #
Phone (REQUIRED) :	Fax #

(Signature of NYS licensed and registered physician, a physician or a licensed nurse practitioner acting within the scope of practice (for psychological counseling services this also includes an appropriate school official and for speech therapy services, a speech-language pathologist who has seen the child.)

PSSHSP REFERRAL FOR EVALUATION OR RECOMMENDATION FOR SERVICES

In accordance with the request by the Committee on Preschool Special Education, a referral for evaluation and/or a recommendation for services as noted below will be provided as specified in the Individualized Education Program (IEP) designed by the Committee. (Check one or both as required.) Evaluation Services

Student Name	DOB
District	County
Agency	(Agency, Center-based Program or Individual Provider)/Phone

(Required)
Term of Service: School Year July 1, 20 to June 30, 20

(Required) Check Appropriate Service(s) / Evaluation(s)
 OT – Service PT – Service OT – Evaluation PT – Evaluation

(Required) (Check)	ICD Code	DESCRIPTION	(Frequency, Duration & Class Ratio as per the IEP)
<input type="checkbox"/>	F82	Coordination Disorder	
<input type="checkbox"/>	F84.0	Autism	
<input type="checkbox"/>	R62.50	Unspecified lack of expected normal physiological development in childhood	
<input type="checkbox"/>	R26.89	Abnormality of Gait: Ataxic, paralytic, spastic, staggering	
<input type="checkbox"/>	R27.8	Lack of Coordination: Ataxia, not otherwise specified; muscular incoordination	
<input type="checkbox"/>	Other		

*The most specific ICD code is required for each evaluation/service.
Medicaid requires that a written referral be in place prior to the initiation of evaluations/services.*

* An order/referral for services must be completed for each IEP period.
A new order/referral must be completed whenever reviews conducted during an IEP period results in a change in service (i.e., frequency/duration/ratio).

Signature	Date Signed
(Original Signature Required – Stamps Not Permitted)	(Required)
Print Name	Title

Address (Required) - (Stamp Accepted)	(Required) License #
	(Required) NPI #
	Medicaid #
Phone (Required)	Fax #

(Signature of NYS licensed and registered physician, a physician or a licensed nurse practitioner acting within the scope of practice (for psychological counseling services this also includes an appropriate school official and for speech therapy services, a speech-language pathologist who has seen the child.)

WHAT WILL SULLIVAN COUNTY EXPECT FROM PROVIDERS?

Comply with Requests for Non-compliant or Missing Documents

- ❑ **Non-Compliant Prescriptions**: If uploaded documentation does not meet Medicaid requirements, you will receive notification from McGuinness regarding what is required to ensure Medicaid claiming.
- ❑ **Outstanding Prescriptions**: Several times throughout the school year you will be contacted by McGuinness with a request for ***missing*** documentation that is required for Medicaid claiming. Please respond to this notification at your earliest convenience to ensure that Medicaid claims are processed within the limited claiming window.

WHAT WILL SULLIVAN COUNTY EXPECT FROM PROVIDERS?

Verify Your Credentials (In the Portal)

- ❑ All licensed therapists ***must*** have their credentials verified through the CPSE Portal. This process is simply verifying that a therapist's NPI and license number is correct.
- ❑ Billing providers will only be able to bill for therapists that have verified credentials.
- ❑ All licensed therapists ***must*** have an NPI number to bill through the Portal – even if the therapist works under the direction of a supervising clinician.

There is no cost to apply for an NPI number and usually takes 7-10 days. Applicants can use the following links to apply:

- <https://www.cms.gov/Medicare/CMS-Forms/CMS-Forms/downloads/cms10114.pdf>
- <https://www.webpt.com/blog/do-i-need-a-new-npi-and-other-npi-questions/>

WHAT WILL SULLIVAN COUNTY EXPECT FROM PROVIDERS?

Credential Verification Approvals

- ❑ In addition to the therapist verifying their credentials in the Portal, the Credential Verification Process ***must be approved*** by the county before billing can move forward. McGuinness will be completing the credential approvals on the County's behalf.
- ❑ Therapists that have unverified credentials or have verified credentials that have not been approved by McGuinness will not be able to submit billing through the Portal. If billing is halted due to a credential approval, please email McGuinness at Medicaid@cpseportal.com.

SUPERVISION

(New to Portal – Required for Billing)

- ❑ Supervision will now be assigned and tracked in the Portal for Speech teachers/CFYs, OTAs/COTAs, PTAs, LMSWs and for providers with limited permits.
- ❑ In addition to entering supervision information to the Portal, the initial Face-to-Face Co-visit date between the servicing therapist, supervisor and child will need to be entered into the Portal by the agency or supervising therapist.
- ❑ If the *Face-to-Face Co-visit Date* is not entered, billing will be suspended (for the child) until the Face-to-Face Date is entered. This date is important because Medicaid cannot be billed for any provided services prior to this date.
- ❑ A webinar has been scheduled to walk you through the supervision process (1/23/23).

WHAT WILL SULLIVAN COUNTY EXPECT FROM PROVIDERS?

Submit CBRS Billing At The Same Time As The CB Billing

- ❑ The County is expecting Center-Based providers to submit the Center-Based Related Service (CBRS) voucher along with the Center-Based (Tuition) voucher.
- ❑ If the county receives the tuition voucher **without** the Center-Based Related Services, the tuition voucher will not be paid.
- ❑ The County (or McGuinness) will notify you if the CBRS billing has not been submitted.

WHAT WILL SULLIVAN COUNTY EXPECT FROM PROVIDERS?

OPRA Enrollment For SLPs

- ❑ In order for Medicaid to pay on a claim, the ordering/referring provider must be enrolled with Medicaid as an **O**rdering, **P**rescribing, **R**eferring, **A**ttending (OPRA) provider.
- ❑ Sullivan County requires SLPs (who are ordering, prescribing, referring) to be OPRA enrolled so the services that they provide will be Medicaid reimbursable.
- ❑ If you are an SLP that is not enrolled in OPRA, the link below will give you helpful information about the enrollment process.
- ❑ Link: <http://support.cpseportal.com/kb/a255/opra-enrollment-information-website.aspx>

TO SUMMARIZE

Providers will be expected to:

- ❑ **Review** and **upload Prescriptions** for **all** children (not just Medicaid children) for service dates beginning **7/1/22**.
This must be completed before you will be able to submit billing in the Portal.
- ❑ Use the **new prescription templates** for all prescriptions (except Speech) beginning **7/1/22**.
- ❑ Comply with requests for **non-compliant** or **missing** Medicaid **documentation**.
- ❑ Have **Credentials** that are **verified** and **approved** in the Portal in order to submit billing in the Portal.
- ❑ **Assign Supervision Plans**, enter **Face-to-Face Meeting dates** and upload **supporting documentation** (required for Audit purposes) in order to submit billing in the Portal.
- ❑ Submit **Center-Based Related Services (CBRS) billing** at the same time as the tuition billing in order to receive payment.
- ❑ **SLPs**
 - Are required to be enrolled in **OPRA** (**O**rdering, **P**rescribing, **R**eferring, **A**ttending).
 - SLPs will be required to complete a **digital speech recommendation** in the Portal for **all** children effective **7/1/22 (billing date)**.
 - SLPs will be required to complete a **digital speech recommendation** even if a doctor submits a prescription that is uploaded to the Portal.

UPCOMING WEBINAR TRAININGS

What will be Covered?

A morning and afternoon presentation will take place for each webinar topic.

- 1) How to Upload Prescriptions* to the Portal – New Screen (1/10/23 – 10:00 & 3:30)
- 2) Medicaid-Compliant Written Orders (1/12/23 – 10:00 & 3:30)
- 3) Digital Speech Recommendations (for SLPs) (1/18/23 – 10:00 & 3:30)
- 4) Supervision* (UDO/USO/Pre-License) – New Screen (1/23/23 – 10:00 & 3:30)

* Required in order to submit billing through the Portal.

The County should have already forwarded the training schedule along with the registration links, dates/times and the target audience for each presentation.

Registration is recommended even if you cannot attend. Registering for each webinar will ensure that you receive the follow-up information via your email.

TIMELINE

- **7/1/22** – Effective Date (Billing Service Date) for the transition to McGuinness
- **1/10/23** – Training on How to Upload Prescriptions – **New Screen**
- **1/12/23** – Medicaid-Compliant Written Orders Training
- **1/18/23** – How to Complete a Speech Recommendation (for SLPs)
Effective 7/1/22 Sullivan County is requiring SLPs to use the digital option for all prescriptions.
- **1/23/23** – Supervision (UDO/USO/Pre-License) – **New Screen**

BILLING REQUIREMENTS

The following requirements must be in place in order for a voucher to be submitted through the Portal. **Prior to billing make sure that...**

- Credentials* have been verified and approved for the service provider
- Unmatched records* have been matched,
- A *prescription* has been uploaded, and
- The *Face-to-Face Co-Visit Date* is entered (if supervision is required).

???

QUESTIONS

CPSE PORTAL KNOWLEDGE BASE FOR MEDICAID

- ❑ As you may already know, you can find tutorials, articles and webinars in the CPSE Portal Knowledge Base.
- ❑ We have put all the Knowledge Base Links that are related to Medicaid into a table for quick reference, which is included within the *New Implementation Guide*.
- ❑ The table of Knowledge Base Medicaid links can also be accessed using this link:
<http://support.cpseportal.com/kb/a231/medicaid-knowledge-base-links.aspx>

CPSE PORTAL KNOWLEDGE BASE FOR MEDICAID - Continued

CPSE PORTAL MEDICAID KNOWLEDGE BASE

Listed below is a list of CPSE Portal Knowledge Base Articles and Webinars that will assist providers/agencies with Medicaid responsibilities. The articles/webinars are categorized as noted in the table below. Links for each of these articles follow this table.

Knowledge Base Articles/Webinars	Description
Children & Enrollments	Therapists and agencies will use these articles to set up and manage temporary enrollments that are created by the therapist or agency. These temporary enrollments will be subsequently matched by the agency so that children can be serviced contemporaneously prior to the creation of the "official" enrollment.
Credential Verification & How to Apply for an NPI #.	In order to be compliant with Medicaid requirements, we need to make sure that therapists are up to date with their credentials. These articles will assist therapists and agencies as well as Portal users without a CPSE Portal login to manage their license and NPI information. Credentials must be verified before billing can be submitted in the Portal.
Lookup	Articles under Lookup will give you information regarding children, enrollments, CPT/ICD, etc.
Medicaid New Implementation Guide (for providers)	This guide will help providers understand the requirements of Full-Service Medicaid with McGuinness.
Medicaid Compliance	We have put together many articles and webinars to help agencies and providers with Medicaid compliance. You will find the following items under this category: <ul style="list-style-type: none"> a webinar and PowerPoint Presentation on Medicaid-Compliant Written Orders, a prescription checklist detailing the valid verses invalid way to complete a Medicaid prescription, a blank Medicaid-compliant prescription template and sample prescription template, and, links to the Medicaid Provider Policy & Billing Handbook and the Medicaid Questions and Answers. <p>These resources will be very helpful with your Medicaid-related responsibilities.</p>
Medicaid Reports (for Documentation)	These reports will help you to determine the documentation that is "missing" (consents, prescriptions, IEPs) and as a result preventing Medicaid claiming.
Prescriptions	There are many articles related to prescriptions. You will find the following under this category: <ul style="list-style-type: none"> "How To" Articles, Articles that will help you with Medicaid compliance as it relates to prescriptions/verifications and, Troubleshooting
Uploading Documentation	These articles will assist you with the processes required for uploading Consent Forms, IEPs and Prescriptions.
User Information	These articles will help you with getting started in the Portal. <ul style="list-style-type: none"> Choosing a PIN #, Entering your signature and credential information, and, Initial set-up
Webinars	These links will bring you to various webinars.

CPSE PORTAL MEDICAID KNOWLEDGE BASE LINKS

New Implementation Guide for McGuinness Full-Service Medicaid (for Providers) http://support.cpseportal.com/kb/a232/mcguinness-full-service-medicaid-new-implementation-guide-for-providers.aspx	
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	
ARTICLE / TUTORIAL / WEBINAR	LINK
CHILDREN & ENROLLMENTS	
Enrollments Added by County	http://support.cpseportal.com/kb/a182/enrollments-added-by-county-report.aspx
Entering Unmatched Children and Unmatched Enrollments	http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx
Matching Unmatched Children and Enrollments	http://support.cpseportal.com/kb/a175/matching-unmatched-children-and-enrollments.aspx
View Unmatched Enrollments	http://support.cpseportal.com/kb/a184/view-unmatched-enrollments.aspx
Editing an Unmatched Child	http://support.cpseportal.com/kb/a124/editing-an-unmatched-child.aspx
CREDENTIAL VERIFICATION	
Credential Verification Webinar	http://support.cpseportal.com/kb/a166/credential-verification.aspx
Credential Verification - Agencies	http://support.cpseportal.com/kb/a149/credential-verification-agencies.aspx
Credential Verification - Providers	http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx
Credential Verification - No Portal Login	http://support.cpseportal.com/kb/a151/credential-verification-no-cpse-portal-login.aspx
Service Provider Credential Verification Listing	http://support.cpseportal.com/kb/a224/credential-verification-listing-approval-listing-reports.aspx?KBSearchID=13730
Website to Apply for an NPI Number	https://npes.cms.hhs.gov/NPES
LOOK-UP	
How to look up a child by ESID #	http://support.cpseportal.com/kb/a178/how-to-look-up-a-child-by-esid.aspx
MEDICAID COMPLIANCE	
Medicaid-Compliant Written Orders Webinar Recording	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx
Medicaid-Compliant Written Orders PowerPoint Presentation	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx
Medicaid-Compliant Written Orders Webinar Q & A	http://support.cpseportal.com/kb/a171/medicaid-compliant-written-orders.aspx
Medicaid-Compliant Written Order Verification Checklist	http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx
Medicaid-Compliant Written Order - Sample	http://support.cpseportal.com/kb/a174/medicaid-compliant-written-order-sample-template.aspx
Medicaid-Compliant Written Order Blank Template	http://support.cpseportal.com/kb/a172/medicaid-compliant-prescription-template.aspx
Medicaid Provider Policy & Billing Handbook	http://www.oms.nyseg.gov/medicaid/handbook/sshap_handbook_9_march_21_2018_final.pdf
Medicaid Questions & Answers	http://www.oms.nyseg.gov/medicaid/q_and_a/q_and_a_combined_revised_12_9_16.pdf
MEDICAID REPORTS (FOR MISSING DOCUMENTATION)	
Missing Documents Preventing Claiming	http://support.cpseportal.com/kb/a191/missing-documents-preventing-claiming-report.aspx
Missing Parental Consents	http://support.cpseportal.com/kb/a99/missing-medicaid-parental-consents.aspx
Missing IEPs	http://support.cpseportal.com/kb/a186/missing-ieps-report.aspx
Missing Prescriptions	http://support.cpseportal.com/kb/a187/missing-prescriptions-report.aspx
PRESCRIPTIONS	
How to Create a Digital Speech Recommendation (Entering Unmatched Children and Unmatched Enrollments may be required for this process.)	http://support.cpseportal.com/kb/a163/creating-a-digital-speech-recommendation.aspx
Prescription Verification Checklist (for Medicaid)	http://support.cpseportal.com/kb/a173/medicaid-compliant-written-order-checklist.aspx
Prescription Requirements for Medicaid	http://support.cpseportal.com/kb/a173/prescription-requirements.aspx
Uploading & Troubleshooting Prescription Documentation	http://support.cpseportal.com/kb/a180/uploading-troubleshooting-prescription-documentation.aspx?KBSearchID=10123

McGuinness Medicaid-in-Education Contact Information

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Kelly Knowles, McGuinness Medicaid Team – kknowles@jmcguinness.com – Extension #28

Follow-up

- This presentation will be recorded and the PowerPoint presentation will be uploaded to the Portal Knowledge Base for future reference.
 - Search for help in our Knowledge Base: <http://support.cpseportal.com/Main/Default.aspx>
 - Email: Medicaid@CPSEPortal.com
 - Questions/Guidance regarding Medicaid compliance:
Contact Deborah Frank – dfrank@jmcguinness.com, 518-393-3635, Ext. #41

□ HELPFUL LINKS

CPSE Portal Knowledge Base Links for Medicaid

<http://support.cpseportal.com/kb/a231/medicaid-knowledge-base-links.aspx>