QUICK REFERENCE GUIDE
Digital Speech Recommendations – Portal

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

When to Create the Digital Recommendation

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

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

Unmatched Enrollments

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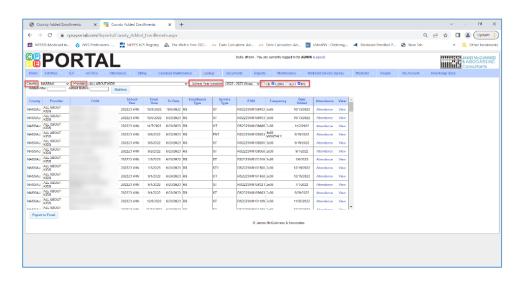
Important Note:

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

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

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

One-Time Set-Up

- For the **SLP**
    - If the SLP does not have a Portal profile or a PIN #, the SLP should go to: **My Account>My Profile** and enter the following information:
        - ✓ License # and current licensure dates
        - ✓ NPI #
        - ✓ Fill in the Signature including credentials (eg., MA CCC SLP)

- For the **Billing Provider**
    - If the Billing Provider information has not been completed, go to: **My Account>Billing Provider Profile**.
        - ✓ Fill in a complete address including phone number with area code.

How to Create the Unmatched Child/Enrollment

- First, search the Portal for the child to ensure that the child does not have a record in the Portal. If the child is *not* in the Portal, create an unmatched child. (Caseload Maintenance>**Unmatched Children**>Click Add Child)

- Create an Unmatched (CB, RS & SEIT) Enrollment
  (Caseload Maintenance>**Add/Edit Unmatched Enrollments**)

- Create unmatched Center-Based Related Service (CBRS) enrollments.

    1) First, create an *unmatched **Center-Based (CB)*** enrollm*ent (from the Add/Edit Unmatched Enrollments Screen)*.

    2) Then, go to Caseload Maintenance>**CBRS Enrollments** to create the (CBRS) "included services" for the center-based enrollment.

    3) Link to Knowledge Base Articles:
       Entering Unmatched Children and Unmatched Enrollments
       http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx

       Entering Unmatched CBRS Enrollments
       http://support.cpseportal.com/kb/a254/entering-unmatched-cbrs-enrollments.aspx

       Matching Unmatched Children & Enrollments
       http://support.cpseportal.com/kb/a175/matching-unmatched-children-and-enrollments.aspx

How to Create the Digital Recommendation

First, make sure the one-time set-up has been completed for:
- The SLP (My Account>My Profile), and
- The Billing Provider (My Account>Billing Provider Profile)

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

1) **Initial** recommendations: Caseload Maintenance > <mark>Prescriptions for Caseload</mark> > Click the *Create Speech Recommendation Link*, or

2) **Subsequent** recommendations: Caseload Maintenance > <mark>Create New Order</mark> > Type in the child's name > Click Search > Click *Select*

3) Link to Knowledge Base Article:
   http://support.cpseportal.com/kb/a160/creating-digital-speech-recommendations-slps.aspx

How do you check the status of the digital recommendation?

- **Therapists** will use the Caseload Maintenance>**Prescriptions for Caseload** screen *(Rx Status Column)*

- **Billing Admins** will use one of two screens:
  1) Lookup>**Child Lookup**, or

  2) Medicaid>Prescriptions>**Prescription Entry Maintenance**
     - Prescription Entries Tab
       Will show you the status of the prescription in the "Status" Column.

     - Prescription Images Tab
       The Description Column will have narrative that states, **"Order File Created in CPSE Portal"** *if a digital recommendation was completed.*

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

- **Therapists** will click the **VIEW** link in the **Prescriptions for Caseload** grid.
  Click on the printer icon at the top of the document or right click and select *Print*.

- **Billing Admins** will view or print by clicking the VIEW IMAGE link:
  o Child Lookup
     Can view or print the prescription by clicking the "Manage" link in either grid.

  o Prescription Entry Maintenance
     Can view or print the prescription by clicking the VIEW IMAGE link from the Prescription Entries Tab

Troubleshooting

The link to create the digital recommendation is not available in the *Prescriptions for Caseload* grid. How do I create my digital recommendation?
   *Go to Caseload Maintenance>**Create New Order**>Search for the Child>Click Select for the correct child>Fill in the digital recommendation template*.

I completed my digital recommendation, but the completed recommendation is not loading.
   You may need to allow "pop-ups" on your computer.