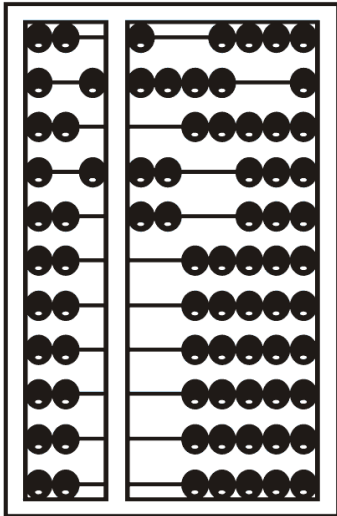JAMES McGUINNESS & ASSOCIATES INC. Consultants

CPSE Portal
Session Notes

Topics Covered

* Classroom Attendance
  * Sign Classroom Attendance
* Attendance Entry / Record
  * Recording Attendance/Treatment Logs
  * Weekly Attendance Calendar
  * Attendance Entry Screen
  * Editing an Existing Attendance
  * Group Attendance
* Creating Defaults for Session Notes
* Signing Attendance / Review & Sign
  * Choosing Your PIN
* Co-Signing Session Notes

* Un-signing Attendance / Making Corrections After Signed
  * View Unsigned Attendances
* Printing Logs
  * Child Treatment Log
  * Parent Signature Log
* Reports
  * View Caseload (for Service Providers)
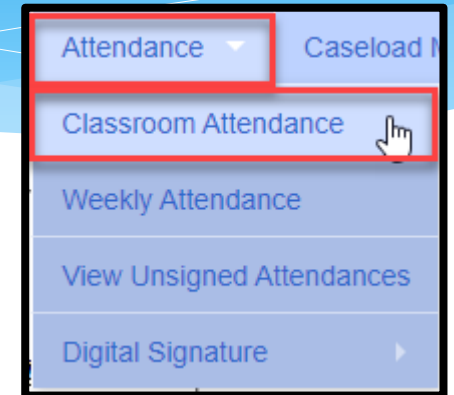 * Enrollment Lookup (for Agencies & Independent Providers)
* Closing

Classroom Attendance

Classroom Attendance

* For children in a Center Based classroom program, their presence is recorded as present or absence.
  * There is no distinction between why they were not present.
  * No additional information is entered (times, activities, progress, etc.).
  * Your agency can create a school schedule that will grey out the days when school is closed.

* However, their services Center Based Related Services (OT, PT, etc.) are recorded with detailed entries.

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Entering Classroom Attendance

* Go To **Attendance -> Classroom Attendance**

* Click on "*Attendance*" to the right of the classroom.

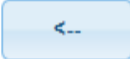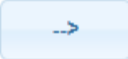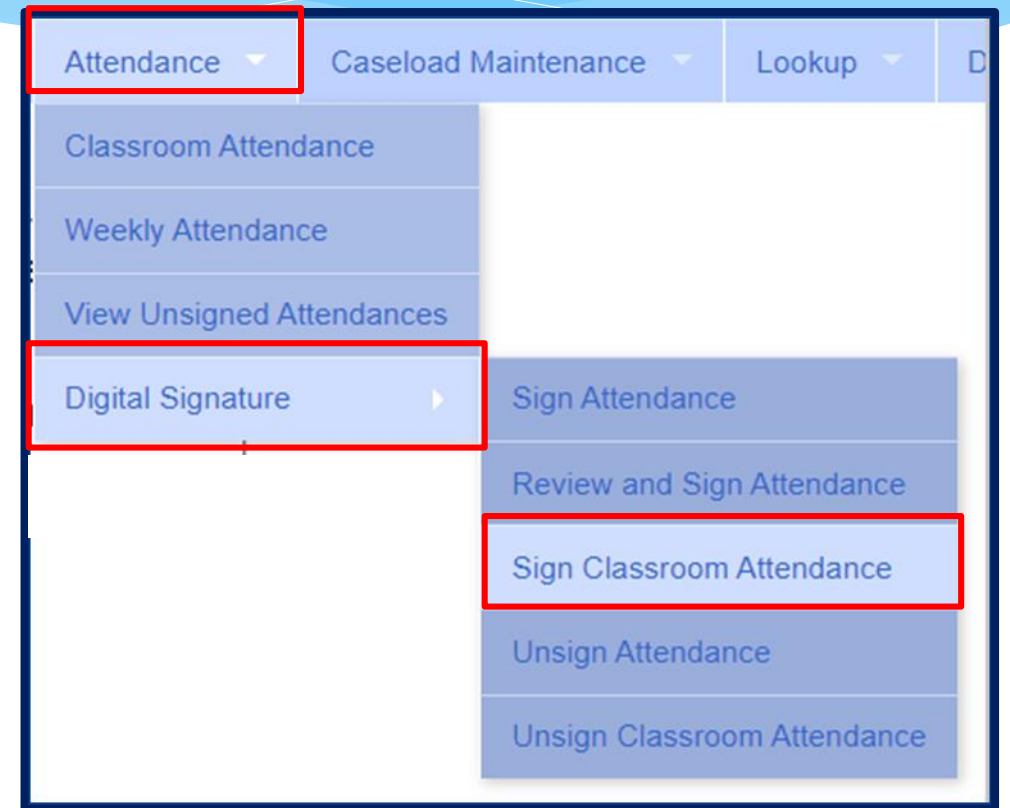# Entering Classroom Attendance

* If a child is present single click on the day and it will be highlighted in green. Green indicates child was present for that day.

* If the child was absent double click on the day and it will change to the color Red. Red indicates the child was absent for that day.

* If school was closed, the date of the closure will be greyed out.

Signing Classroom Attendance

* Go to **Attendance > Digital Signature > Sign Classroom Attendance**

Attendance	Caseload Maintenance	Lookup
Classroom Attendance		
Weekly Attendance		
View Unsigned Attendances		
Digital Signature ▶	Sign Attendance	
	Review and Sign Attendance	
	Sign Classroom Attendance	
	Unsign Attendance	
	Unsign Classroom Attendance	

Signing Classroom Attendance

* This screen shows the attendance you need to review/edit/sign for.
* You can filter by a classroom, month, the county and provider.
* Once you have selected your filter, hit "*Retrieve*".

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Signing Classroom Attendance

* Teachers can delete attendances but you cannot add them on this screen before your sign your attendances.

* First, select the attendances you wish to sign for by clicking the box next to each name.

* Once you have reviewed/edited your attendance, click on "*Sign Attendance*".

* Read the agreement, enter your pin and click "I agree."

Attendance Entry / Record

Attendance Entry/Record

For SEIT, fee for Related Services or Related Services as part of a Center Based classroom tuition program, the Attendance Entry or Attendance Record contains:

* Child
* Service Type
* Individual vs. Group
* Date of Service
* Time In/Time Out
* Co-Visit with Supervisor
* Setting

* Location
* Entry Type: Provided, Missed or Make-Up
* ICD 10 Codes
* CPT Codes
* Does Not Meet Medicaid Requirements
* Progress
* Notes - also referred to as session notes, treatment notes or treatment logs.

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Attendance Entry –
CBRS (Center Based Related Services)

* The services provided to a child in a Center Based program is called Center Based Related Services, which is commonly called CBRS.

* Even though CBRS is included within the cost of the tuition, it is **imperative** that **ALL** CBRS have attendance/session notes entered into the Portal.

* **These session notes are needed for the County to be able to bill Medicaid for any services provided for possible reimbursement.**

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Recording Attendance / Treatment Logs

* Used for all services including:
  * SEIT / SEIS
  * Fee for service Related Services (OT, PT, etc)
  * Related Services that are included on the IEP for a child in a Center Based classroom program (OT, PT, etc.)

* Go to *Attendance -> Weekly Attendance*
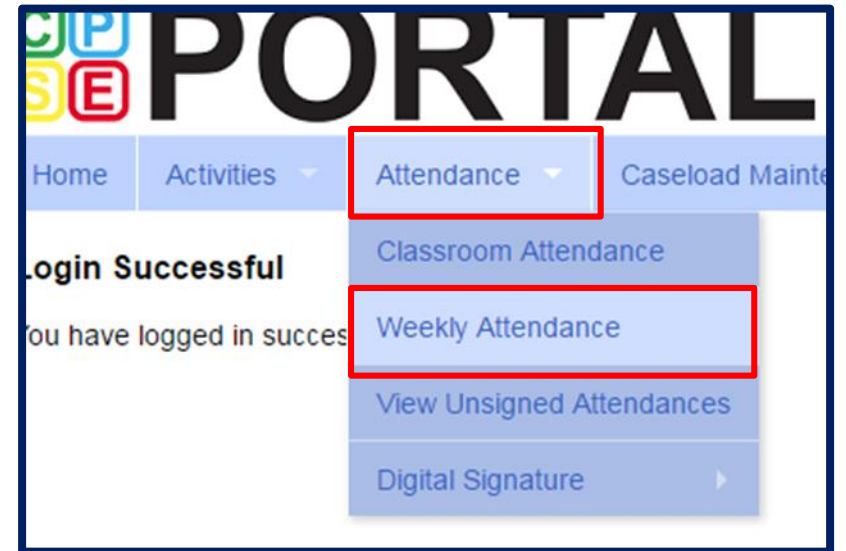
Weekly Attendance Calendar

* The drop down in the upper left (yellow highlight) shows the current therapist.
* You can change weeks by changing the "Jump to:" date or using the navigation buttons (red arrows).
* The calendar displays the attendance entries for the current therapist.
* To add a new entry, click the time slot corresponding to when the session was provided, and this will bring up the Attendance Entry Screen.

Attendance Entry Screen

This screen has fields for:

* Time In / Time Out
* Setting / Location
* # of sessions to bill (should be 1 for most related services) SEIT may be in increments of 30 or 60 minute sessions (per IEP) (I.E. – 2x30 or 1x60)
* Child (enrollment)
* Entry Type
* ICD Codes
* CPT Codes
* Does Not Meet Medicaid Requirements
* Progress indicator
* Notes

Attendance Entry – Time & Location

* You can modify the Time In / Time Out to match exact times.
* Choose the setting that most closely matches the setting where the service was provided.
* Provide a description of the location – I.E. : ABC Daycare or address of daycare.

Attendance Entry – # of Sessions

* Enter the # of sessions / units to submit to the County.

* In top example, this entry would be for 1-45 minute session.

* In bottom example, this would represent a 1 hour SEIT session that would be submitted as 2-30 minute sessions (this will always match the IEP).

New Session for May 13, 2016

Time In: 10:05 AM ▾   Time Out: 10:50 AM ▾

1 x 45 minute session(s)

☐ Co-Visit with Supervisor

New Session for May 11, 2016

Time In: 02:45 PM ▾   Time Out: 03:45 PM ▾

2 x 30 minute session(s)

☐ Co-Visit with Supervisor

Attendance Entry – Co-Visit

* This is for UDO/USO entries where the Supervisor is doing a co-visit with the COTA, PTA, CFY, etc.

* This is **NOT** for indicating a co-visit with a different discipline.

* When the check box is marked, a drop down of supervisors will appear to allow the user to specify who the co-visit was with.

New Session for Mar 5, 2021

Time In: 11:15 AM ▾   Time Out: 11:30 AM ▾

Setting: Daycare ▾

Bill this session as: 1 x30 minute session(s)

☐ Co-Visit with Supervisor

Location: Little Red Schoolhouse, Hurley, NY ▾

Attendance Entry – Selecting the Child / Enrollment

* The "Child" list are all enrollments assigned to you.
* Each enrollment entry list includes:
  * Child's Name
  * Frequency
  * Service Type
  * Individual vs. Group
  * Date range
* Select the appropriate one
* **Warning!** Be careful when selecting if there are multiple lines for a child when:
  * You provide both therapy and service coordination.
  * They have both individual and group enrollments.

New Session for Mar 5, 2021

Time In: 11:15 AM Time Out: 11:30 AM

Setting: Daycare

Bill this session as: 1 x30 minute session(s)

☐ Co-Visit with Supervisor

Location: Little Red Schoolhouse, Hurley, NY

[AYERS, ISABELL]

Child:
AYERS, ISABELL 2x30 - ST - I 09/09/20 - 06/25/21
Not Selected
AYERS, ISABELL 2x30 - ST - I 09/09/20 - 06/25/21
BENTON, JERROD 3x30 - ST - I 09/09/20 - 06/25/21
DAVILA, FOSTER 2x30 - ST - I 12/08/20 - 06/25/21
FOSTER, ERNEST 2x30 - ST - I 09/08/20 - 06/25/21
HARDEN, DUDLEY 2x30 - ST - I 09/08/20 - 06/25/21
HOLBROOK, LOWELL 2x30 - ST - I 02/09/21 - 03/26/21
MONTALVO, ROLLAND 2x30 - ST - I 02/09/21 - 06/25/21
OTT, DION 2x30 - ST1 - G 09/08/20 - 03/22/21
PARSONS, JUNIOR 2x30 - ST - I 01/19/21 - 06/25/21

New Session for Mar 13, 2023

Time In: 08:00 AM Time Out: 08:30 AM

Setting: Daycare

Bill this session as: 1.00 x30 minute session(s)

☐ Co-Visit with Supervisor

Location: Little Red Schoolhouse, Hurley, NY

[ADAM, ENRIQUE]

Enrollment:
ADAM, ENRIQUE 2x30 - ST - I 09/07/22 - 06/23/23 Daycare

ESID CBRS2223W0101481 Nickname
Service Type ST Frequency 2 x 30

Attendance Entry – Entry Type

* This field contains 3 entry types:
  * Provided Treatment Session
  * Missed Treatment Session
  * Make Up Session

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Attendance Entry – Provided Treatment Session

* Session Notes must include "Progress" made. In addition to checking the radio buttons for *No Progress, Limited Progress or Progress*, the session note description should include progress for the session.

* For example, a speech provider might enter the following note:

Session Notes: Activity Related to IEP Goals (including objectives and measures of success) and response(s) of child
____ was engaged and attentive throughout the session. ____ and the clinician targeted basic concepts and responding to 'wh' questions. Given picture cards, he was able to identify appropriate responses when choices were provided with 70% accuracy given moderate cues. He accurately differentiated between items that were the "same" and "different" with 70% accuracy. Therapy will continue to target expanding utterances and responding to 'wh' questions.

Example of Medicaid Session Note

* Medicaid does not allow you to use canned session notes.
* Below is an example of a Medicaid session note from the Medicaid handbook:

SAMPLE SESSION NOTE – (Includes all Medicaid-required elements)

Student Name: John Smith

Date: December 10, 2015

Time in/Time out: 10:00am /10:30am

Practitioner Name: Martha Clark

Service Type: Speech Therapy

Location: Springdale Elementary

Indiv (I) Group (G) (incl # in group): I

Session Note: During this session John produced initial, medial, and final /l/ with 80% accuracy in words. John is demonstrating good progress. He continues to improve his production of the /l/ in all positions in single words.

TSHH

Practitioner's signature, title, and credentials

Mary Brown, SLP 1/8/16

Dated supervising signature and credentials if UDO required

Attendance Entry – Missed Treatment Session

* The Missed Treatment Session is used when the child or the service provider is absent.
* Your session note should contain who was absent:
  * The child or
  * The therapist
* If you know why the child was absent then write a reason why.
* Once you choose Missed Treatment Session, the below items now populate:
  * NOICD
  * NOCPT
  * The box for Does Not Meet Medicaid Requirements will be checked.

Attendance Entry – Missed Treatment Session

Attendance Entry – Missed Treatment Session

* The Missed Treatment Session will appear in red on the Weekly Attendance screen.

Attendance Entry – Make Up Session

* If session is a makeup:

  * Choose the Entry Type - Make Up Session.

  * In the corresponding date box that appears, indicate the date of the missed session that is being made-up.

  * Any make-ups for a prior week or are over the frequency number for the current week should be marked not Medicaid eligible.

Attendance Entry – Diagnosis Code
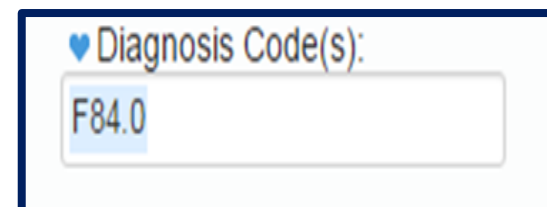
* Type the start of the diagnosis code (or entire code)… pause for a second for list to fill… choose code.

* Once chosen, the code will show in the text box highlighted in light blue.

* To add a second code, repeat the process.

♥ Diagnosis Code(s):

Search by code or description…
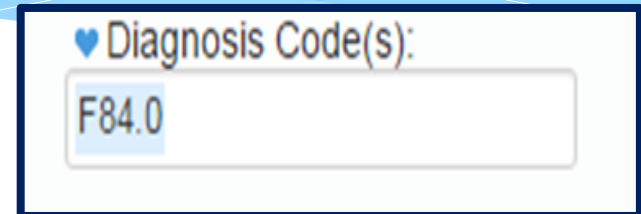
♥ Diagnosis Code(s):

F84

F84
Pervasive developmental disorders
F84.0
Autistic disorder
F84.2
Rett's syndrome
F84.3
Other childhood disintegrative disorder
F84.5
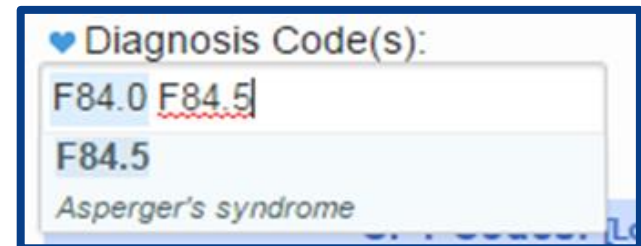
♥ Diagnosis Code(s):

F84.0

Attendance Entry – Additional Diagnosis Codes
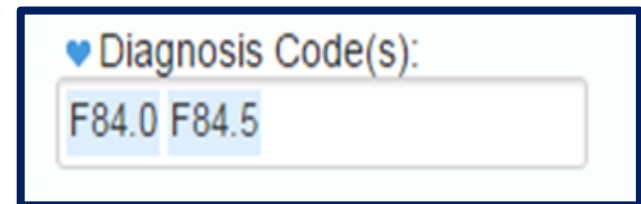
* To add additional ICD codes:
  * Click the blank space to the right of the last diagnosis code displayed.
  * Type the new code…when the list appears…select the correct one.
  * The additional codes will be displayed in the text box.

♥ Diagnosis Code(s):

F84.0

♥ Diagnosis Code(s):

F84.0 F84.5

F84.5

Asperger's syndrome

♥ Diagnosis Code(s):

F84.0 F84.5

Attendance Entry – Diagnosis Favorites

* Click the blue heart next to the Diagnosis Code(s) label.

* A list of the diagnosis that you pre-configured as "favorites" (My Profile screen) will appear.

* Choose the appropriate diagnosis.
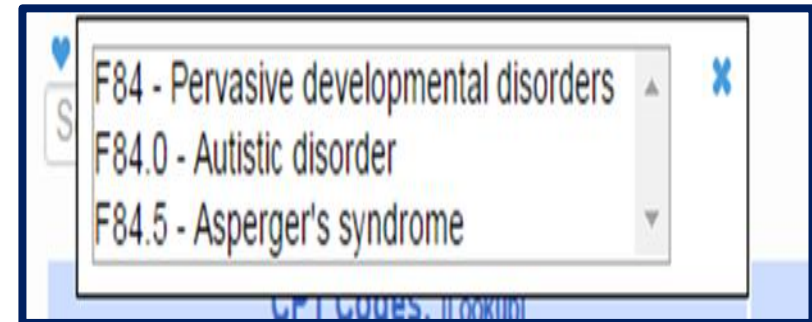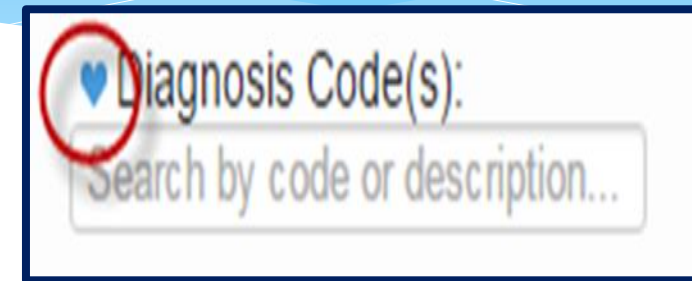
No ICD Code

* If you are a provider that does not require an ICD Code, then you can enter **NOICD**.

  * SEIT,

  * TOD,

  * TVI etc…..

  Or a missed session will be NOICD.

Diagnosis Code(s):

NOICD

Attendance Entry – CPT Code

* Type the CPT Code into the box.

* The description will appear and the units will default to "1".

* If the CPT Code is an untimed code, leave the units as "1" (top example).

* If the CPT Code is a timed code (typically based in 15 minute units), then change the number of units (bottom example).

* Click the blue heart next to the CPT Code(s) to create favorites.

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CPT Codes: [Lookup]	Units:
♥ 92507 TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/ OR AUDITORY PROCESSING DISORDER; INDIVIDUAL	1
♥	☐

CPT Codes: [Lookup]	Units:
♥ 97112 THERAPEUTIC PROCEDURE, ONE OR MORE AREAS, EACH 15 MINUTES; NEUROMUSCULAR REEDUCATION OF MOVEMENT, BALANCE, COORDINATION, KINESTHETIC SENSE, POSTURE, AND/OR PROPRIOCEPTION FOR SITTING AND/OR STANDING ACTIVITIES	2
♥ 97110 THERAPEUTIC PROCEDURE, ONE OR MORE AREAS, EACH 15 MINUTES; THERAPEUTIC EXERCISES TO DEVELOP STRENGTH AND ENDURANCE, RANGE OF MOTION AND FLEXIBILITY	1
♥	☐

CPT Codes –
Timed vs. Untimed

* From CPT Code list on Resources page of SED Medicaid in Education site (http://www.oms.nysed.gov/medicaid/resources/)

  CPT codes are either timed or untimed. Timed codes require the entry of units. When the practitioner chooses a code, the number of units must also be indicated. For example, if the physical therapist provided a service (CPT code 97140), and the session lasted 30 minutes, two units would be billed. Untimed codes are used on a one-per-session/per day basis. With one exception, providers should not report more than one physical medicine and rehabilitation therapy service for the same 15 minute time period. The only exception involves a "supervised modality" defined by CPT codes 97010-97028 which may be reported for the same 15 minute time period as other therapy services. For more information on the use of CPT codes and the claiming parameters, please contact your individual professional organizations.

No CPT Code

* If you are a provider that does not require an ICD Code, then you can enter NOICD.

* Or a missed session will be NOCPT.

CPT Codes: [Lookup]	Units:
♥ NOCPT No CPT Code for this service	1
♥	

Attendance Entry –
Does Not Meet Medicaid Requirements

* This is **NOT** about whether the child is Medicaid eligible or not.

* This is to indicate that this particular session does not meet all the requirements that Medicaid requires. Examples could include…
    * The session was not provided per the IEP because:
        * The duration was less than the IEP (20 minutes instead of 30)
        * The setting/location was different than specified in the IEP
        * The IEP was for group, but there was only one child in session
        * The IEP is for 2x30 per week, but this was the third session this week (makeup)

* Any other possible reason that it would not meet Medicaid standards.

☐ Does Not Meet Medicaid Requirements

Attendance Entry – Session Note

* You can indicate progress using the progress indicators.

* In the notes, you can record your notes per policies and regulations.

* According to SED site, a session note is a "Brief description of the student's progress made by receiving the service during the session".

Progress: ○ No Progress ○ Limited Progress ◉ Progress

Session Notes:

Goal #1. Much more verbal. First day spontaneous speech was observed. Initial sd. rep. 1x. Additional speech fluent. Modeled slow easy speech.

Goal #2. Th sd. error. Modeled correct production.

Editing an Existing Attendance

* Click any session on the calendar to edit or view the details of the session.

* If the fields are greyed out and there is no save button, that means the session is signed and **cannot** be modified without un-signing first.

* If you cannot unsign your attendance, then the child is likely on a billing voucher, and needs to be removed.

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Group Attendance

* Group attendance is entered using same screen.
* If the chosen enrollment is for "group" the screen adds:
  * A field to enter # of children in the Group.
  * Links to select the other children in the group. The selected child is in bold.
  * The child name appears as the generic "Child X" until you select an enrollment for Child X.
* The screen provides for the ability to enter separate ICD, CPT and notes for each child.
* On the calendar, they display as "GRP" and then the last names.
* For a group of 1, you **cannot** use a group CPT code. You must use an individual CPT code.
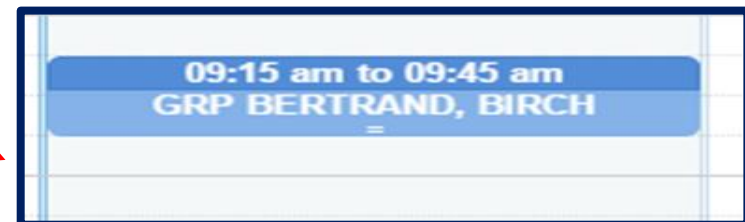
Creating Defaults for Session Notes

Creating Defaults

* You can create defaults for your session notes / attendances that can include:
    * Service Setting,
    * Location,
    * Default CPT Code,
    * Default ICD 10 Code.

* Go to *Caseload Maintenance -> My Caseload.*

Caseload Maintenance ▼	Lookup ▼	Docur
CBRS Enrollments		
My Caseload		
Prescriptions for Caseload		
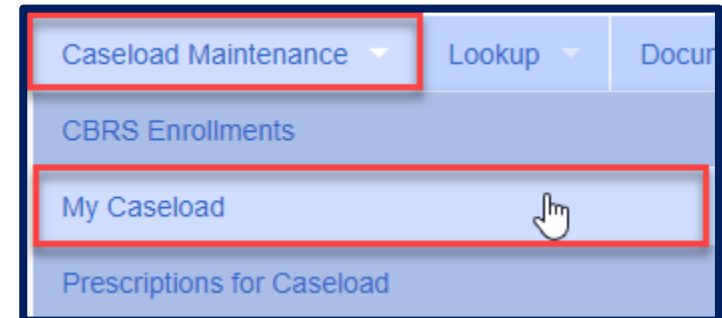
Creating Defaults

* Click on the "*Defaults*" button at the end of the enrollment.

Creating Defaults

* Now you will enter:
  * Service Setting
  * Location
  * Default CPT Code
  * Default ICD 10 Code

* You can also enter an enrollment note. Here you can enter the goals off of the IEP, and the goals will then populate to each session note. You can then adjust as needed.

Creating Defaults

Enrollment Defaults

Enrollment Info

Child Name: BOYKIN, MATTIE   **Electronic Service ID:** RS2122W0016895   **Enrollment Type:** RS   **RS Type:** ST
County: SCHENECTADY   **Provider:** GEBAUER,BETTY   **District:** Schenectady

Service Nickname:

Enrollment Notes:
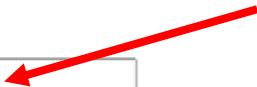
For each new attendance use these default values

Bill each entry as [1] 30 minute session(s) for a total duration of 30 minutes.

Service Setting: Preschool   **Location:** Little Red Schoolhouse, Hurley, NY

Default CPT Code for new attendance

	CPT Code	Description	Units	
Edit	92507	TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/ OR AUDITORY PROCESSING DISORDER; INDIVIDUAL	1	Delete
				Add

Default ICD10 Code for new attendance

	ICD 10 Code	Description	
Edit	F80.2	Mixed receptive-expressive language disorder	Delete
			Add

Save

Creating Defaults

* Here is an example of the session note that will populate with the defaults that were created for this child's enrollment.

Signing Attendance / Review and Sign

Signing Attendance

* After attendance is entered, it needs to be signed.

* Once it is signed, it **cannot** be modified without going through the "un-signing" process.

* A digital signature is equivalent to signing your name on paper with ink.

* A digital signature requires that you intentionally take action to indicate your signature.

* The action in CPSE Portal is to enter a PIN that you have chosen.

* Your PIN works in conjunction with your username/password.

* You should never share your password or your PIN with anyone.

Choosing / Changing Your Pin

* Go to **My Account -> My Pin**

* Your PIN can be numbers, letters or both.

* Choose a PIN and click "*Save PIN*".

* The screen will prompt you to enter your log on password.

* This is NOT your PIN, this is the password you use to login to CPSE Portal.

* Click "*Proceed*".

PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign attendance until you do so. Please create one now.

PIN Number: Jon1975   Save PIN

Password Verification

For additional security, please re-enter your login password.

Password ....

Proceed

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PIN Problems

* The # 1 issue with PINs is letting the browser save your PIN.

* Ensure when setting / changing your PIN, that your browser doesn't try to overwrite your PIN.

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PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign

PIN Number: Jon1975   Save PIN

PIN Selection

You have not yet chosen a PIN. You will be unable to digitally sign attendance u

PIN Number: 1234   Save PIN

Password Verification

For additional security, please re-enter your login password.

Password ....

Proceed

Signing Your Attendance

* Items needed for Signing:
  * You must have set your PIN.
  * You must have your Title, Signature and Credentials entered.
  * You must have a valid (not expired) license / profession entered.

Review and Sign

* Go to **Attendance > Digital Signature > Review and Sign Attendance**
* This will bring you to a screen which will verify your profile information as well as show unsigned attendances. Make sure all profile information are green checkmarks. If not then go to your profile and correct.

Review and Sign

* Within the unsigned attendances, there will also be icons listed under the Audit tab in the "Status" column:

 A green check means there are no errors

 A yellow exclamation point is a warning and will not prevent signing.

 A red "X" means there is an error that will prevent signing.

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Profile

First Name: KRISTEN **Last Name:** HOFFMAN **NPI:** 1508012717

Edit ✓ Signing As: Betty Gebauer Speech Pathologist, CCC-SLP

	Status	Profession Code	Description	Credential Type	#	State	From	To
Edit ✓ Credentials:	✓	SLP	Licensed Speech & Language Pathologist	License	008342	NY	12/20/1994	4/30/2024

NYS Office of Professions Search

✓ Missing Attestations: No Missing Attestations!

Edit ✗ PIN Created

Unsigned Attendances

School Year Session: (School Year Session) ▾   Apply Filter
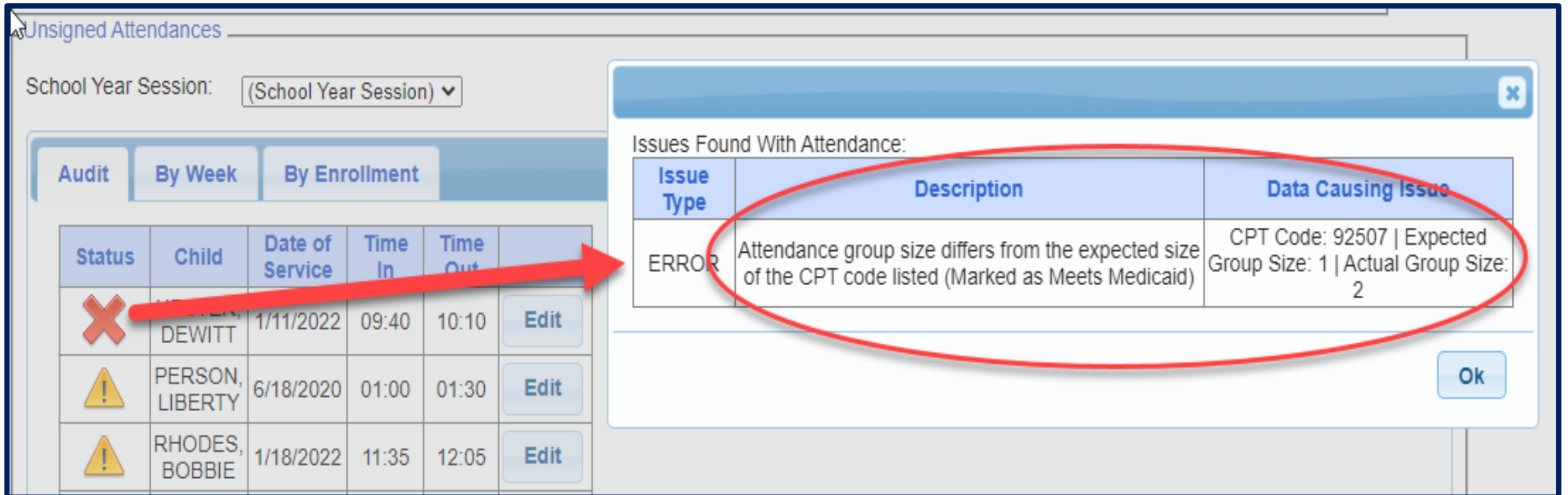
Audit	**By Week**	**By Enrollment**

Status	Child	Date of Service	Time In	Time Out	
✗	HESTER, DEWITT	1/11/2022	09:40	10:10	Edit
⚠	PERSON, LIBERTY	6/18/2020	01:00	01:30	Edit
⚠	RHODES, BOBBIE	1/18/2022	11:35	12:05	Edit
⚠	RHODES, BOBBIE	1/20/2022	11:30	12:00	Edit
⚠	RHODES, BOBBIE	1/21/2022	09:40	10:10	Edit

Review and Sign

* By clicking on the icon, you can see what the reason is.

Review and Sign

* Click "*Edit*", and make appropriate changes to session note.

Review and Sign by Week

* By Week:
  * Under the "By Week" tab, the attendances are listed by date.
  * You may view more information, as well as sign the attendances, by clicking the "*Review & Sign*" link under the navigation column.

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Review and Sign by Week

* You will then be able to toggle between days of the week.

* To sign:
  * Check the desired boxes & click "*Sign*"
  * If there is a problem with the attendance that you'd like to correct, use the "*Edit*" button.

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Review and Sign by Enrollment

* By Enrollment:
  * Under the "By Enrollment" tab, the attendances are listed by enrollment.
  * You may view more information, as well as sign the attendances, by clicking the "*Review & Sign*" link under the navigation column.

Review and Sign

* To sign:
  * Check the desired boxes & click "*Sign Attendance*".
  * If there is a problem with the attendance that you'd like to correct, use the "*Edit*" button.

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Sign By Entering PIN

* In the box that appears:
  * Confirm your information
  * Enter your PIN
  * Click "*I Agree*" to certify that you have reviewed the information and you are signing attesting that everything is correct

Enter PIN

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.

NOTE: Credentials are REQUIRED to sign. Please verify credentials below. If they are not correct, update them on your profile page.

Name: KRISTEN HOFFMAN

Signing As: Betty Gebauer Speech Pathologist, CCC-SLP

NPI: 1508012717

Date: 6/10/2022

Pin:

I agree.

Sign Frequently

* As a best practice, you should sign frequently.
  * After you record your notes for the day, sign your attendances.

* Waiting until the end of the month **causes** problems.
  * There are too many entries to do a proper review.
  * It is too long past the activity to remember anything.

Co-Signing Session Notes

Co-Signing Session Notes

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

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Co-Signing Session Notes

* Use your filter to select date range, therapist or 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.

Co-Signing Session Notes

Un-signing Attendance / Making Corrections After Signed

Un-signing Attendance – Making Corrections After Attendance is Signed

* If after you reviewed and signed attesting that everything was accurate, a mistake is noticed, the process to correct is as follows:
  * If the entry is on a voucher to be billed (but hasn't been paid), it needs to be removed from the voucher.
  * You will unsign your attendance, make correction, and resign your attendance.

* Teachers will also need to unsign their attendance to make a correction, but they will choose "*Unsign Classroom Attendance*".

* Go to ***Attendance -> Digital Signature -> Unsign Attendance***

Un-signing Attendance

* Use Filter to search for attendances.
* Click check box on rows to unsign.
* Click "*Unsign Attendance*".
* Enter the reason (ex. entered wrong time).
* Enter your PIN.
* Click "*I Agree*" attesting that you previously verified signed but are inaccurate.

View Unsigned Attendance

* Go to *Attendance > View Unsigned Attendances*

* This will give you a list of attendances that have been started but not completed. Incomplete attendances can be deleted from here.
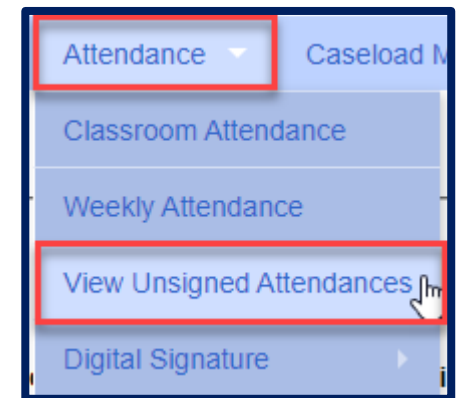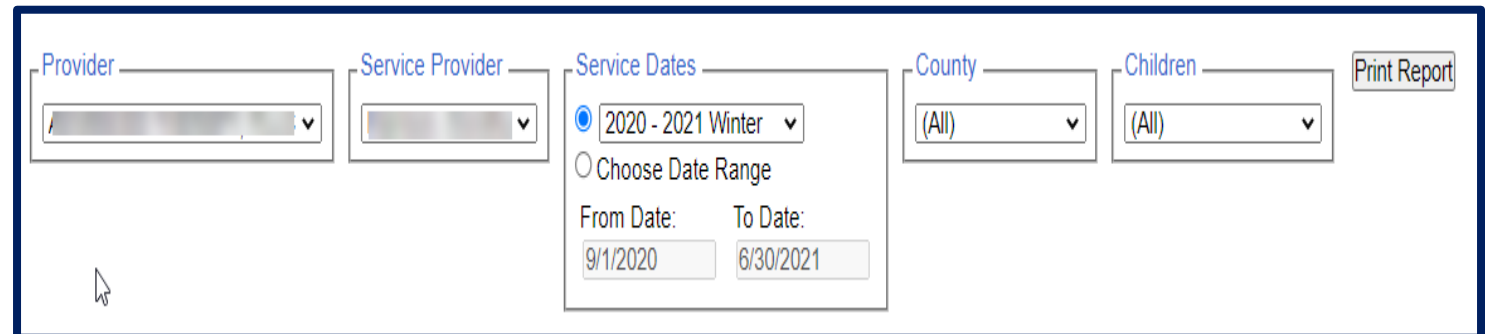
Printing Logs

Child Treatment Log

* Go to **Reports -> Child Treatment Log**

* The filters will allow you to specify criteria for the report:
  * Select Service Provider
  * Select Service Dates
  * Select County
  * Select Child(ren)

Child Treatment Log

Print Parent Signature Log

* Go to *Caseload Maintenance > My Caseload*

* Choose the Enrollment needed, and click Generate Blank Signature Logs for Selected Enrollment.

* On Generate Parent/Guardian Signature Logs, choose month, and click Generate.

Print Parent Signature Log

CPSE PORTAL
SCHENECTADY County

Preschool Confirmation of Delivery of Services

_____
Service Month

Child's Name MATTIE BOYKIN	DOB 12/06/2016	Type of Service Speech Therapy		Frequency & Duration 2x30
Agency Name GEBAUER,BETTY	NPI # 1508012717	School District Schenectady		
Name of Individual Service Provider KRISTEN HOFFMAN	Profession Licensed Speech & Language Patholc		License 008342	NPI 1508012717

Date of service	Start time	End time	Session Code: P, CA, TA, MU	Parent/Guardian Signature/Verifying Witness Signature

Service Codes: P-Service Provided, CA-Child Absent, TA-Teacher Absent, MU-Makeup

Reports

View Caseload – For Service Providers

* Are you a Service Provider working for an agency, and can't find one of your students?

* Go to *Caseload Maintenance -> My Caseload*

* If the child is not listed, contact the administrator of your agency and ask them to assign the child to you.

Caseload Maintenance ▼	Lookup ▼	Docum
CBRS Enrollments		
My Caseload		
Prescriptions for Caseload		
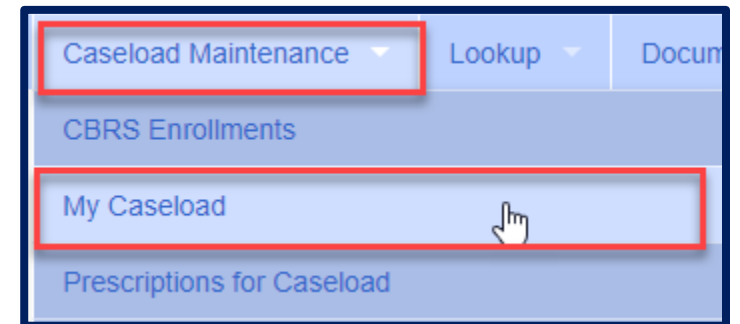
View Caseload

* You can also see all of the attendances that you entered for the child by clicking on Attendances.

View Caseload

* In the screen shot below you can see that the attendance has not been signed by the service provider.

Attendance List

Child Name: FOSTER, ERNEST   **County:** SCHENECTADY   **Provider:** GEBAUER,BETTY   **District:** SCHALMONT CSD
ESID: RS2122W0016888   **From/To:** 1/10/2022-6/24/2022   **Service:** RS-ST (IND)   **Frequency:** 1x30

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 #		
01/10/22	Provided Treatment Session			1:00 PM	1:30 PM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I				Treatment Log	Details

Enrollment Lookup –
For Agency Staff or Independent Providers

* You can search for enrollments to find all students that have been assigned to your agency. You can also see all attendances that you have entered on the enrollment.

* If a child is not listed, then contact the County.

* Go to *Lookup > Enrollment Lookup*

Lookup ▾	Documents ▾	Rep
Child Lookup		
Enrollment Lookup		
CPT Code Lookup		
ICD9 to ICD10 GEMS		
ICD Code Lookup		
District Lookup		
NPI Lookup		
Program Provider Lookup		
Rescinded CB Enrollments w/ CBRS		
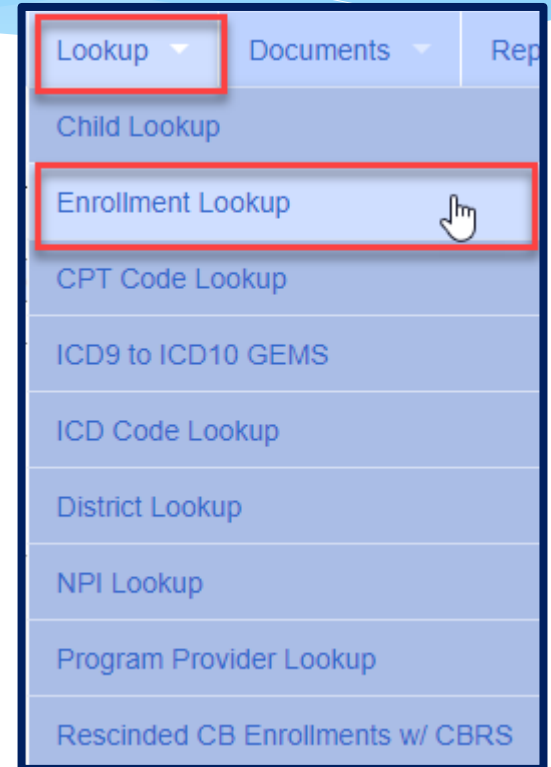
Enrollment Lookup

* Filter the School Year Session, County, and what enrollment type you are looking for.
* Click on Attendances to see all attendances entered on the enrollment.

Enrollment Lookup – Attendance List

* This will also show if the attendances have been billed, and what Voucher # they have been billed on.
* Click on Treatment Log to see the actual session note.

Attendance List

Child Name: CHERRY, YONG   **County:** SCHENECTADY   **Provider:** GEBAUER,BETTY   **District:** Mohonasen
ESID: RS1920W0014784   **From/To:** 9/3/2019-11/19/2019   **Service:** RS-ST (IND)   **Frequency:** 2x30

Service Date	Make Up	Medicaid	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #	
09/11/19			9:10 AM	9:40 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/16/19			9:35 AM	10:05 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/18/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/23/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/25/19			8:55 AM	9:25 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
09/30/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	10/05/19	10/05/19	RS191005101620	Treatment Log
10/02/19			9:15 AM	9:45 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/07/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/09/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/21/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/23/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
10/28/19			9:00 AM	9:30 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	11/11/19	11/11/19	RS191111104620	Treatment Log
11/01/19			11:15 AM	11:45 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log
11/13/19			9:10 AM	9:40 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log
11/15/19			10:50 AM	11:20 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log
11/18/19			9:15 AM	9:45 AM	30	1.00	30	KRISTEN HOFFMAN	Preschool	I	12/02/19	12/02/19	RS191202143036	Treatment Log

Closing

Knowledge Base Articles

* **Entering Weekly Attendance**
  * *http://support.cpseportal.com/kb/a38/entering-weekly-attendance.aspx*
* **Review and Sign Attendance**
  * *http://support.cpseportal.com/kb/a148/review-and-sign-attendance.aspx?KBSearchID=16970*
* **Child Treatment Log**
  * *http://support.cpseportal.com/kb/a28/child-treatment-log.aspx?KBSearchID=16959*
* **Parent/Caregiver Signature Logs (blank logs for counties)**
  * *http://support.cpseportal.com/kb/a69/parent-caregiver-signature-logs.aspx?KBSearchID=16964*
* **Therapist Activity Report**
  * *http://support.cpseportal.com/kb/a27/therapist-activity.aspx?KBSearchID=16966*

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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*
  * When sending an email:
    * Do **not** use child's name
    * Use ESID #, Child # or STAC ID #
    * Include your county, and info needed