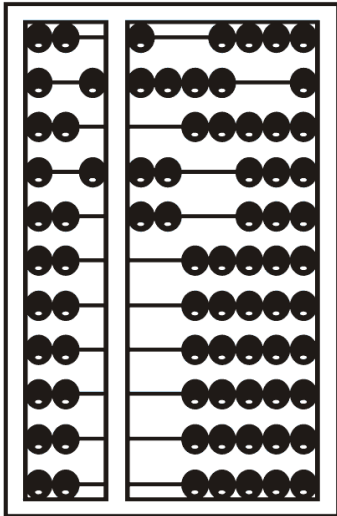


JAMES MCGUINNESS
& ASSOCIATES INC.
Consultants



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



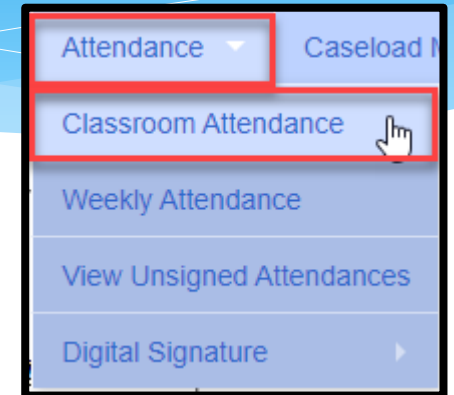
Classroom Attendance

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.

Entering Classroom Attendance

- * Go To **Attendance -> Classroom Attendance**
- * Click on “Attendance” to the right of the classroom.


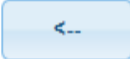
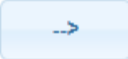


A screenshot of a classroom management interface. At the top, there is a 'Filter Classrooms' section with dropdowns for 'Session' (2019 - 2020 Winter), 'Program' (Active During), and 'Active During (Select Month & Year)'. Below the filters is an 'Apply Filter' button. A red arrow points from the second bullet point in the list above to the 'Attendance' button in the first row of the table below.

Attendance	Class	Description	School Year	Program	# Students	# Teachers	# Aides		
Attendance	AQ - 1 AM (29:0:0)	AQ - 1 AM	2019 - 2020 Winter	9100	8	1	0	Edit Classroom	Assign Children
Attendance	AQ - 2 (97:0:0)	AQ - 2	2019 - 2020 Winter	9160	7	1	0	Edit Classroom	Assign Children
Attendance	AQ - 3 AM (82:0:0)	AQ - 3 AM	2019 - 2020 Winter	9165	8	2	0	Edit Classroom	Assign Children

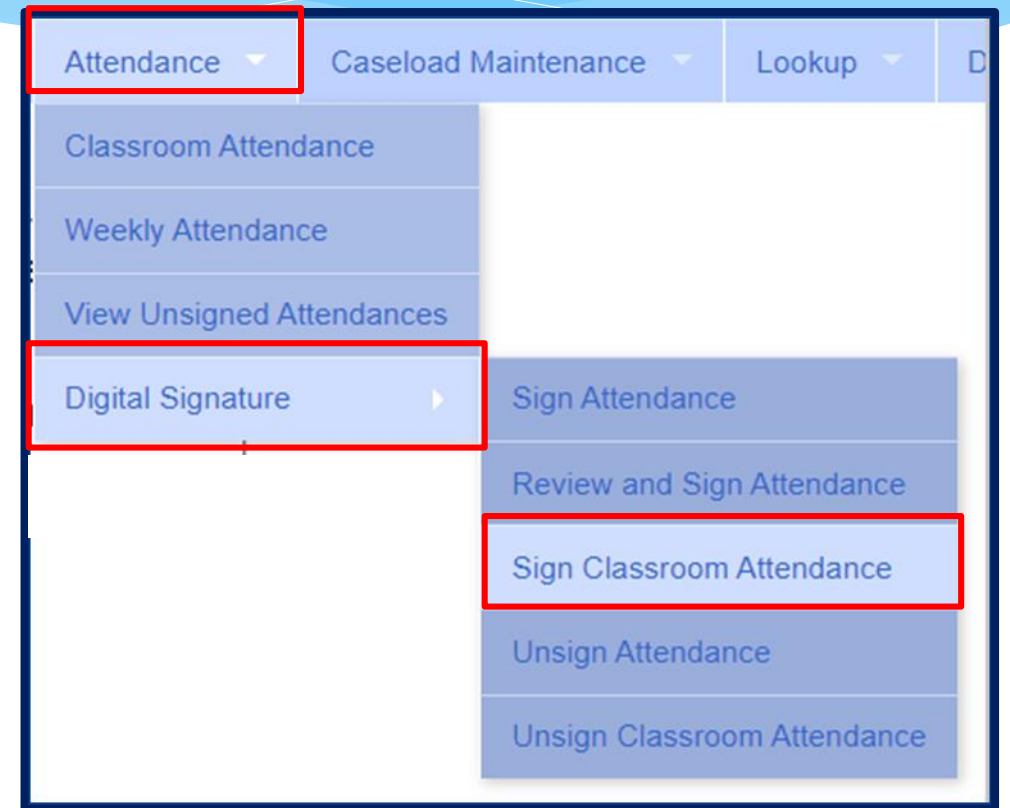
Entering Classroom Attendance

- * 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.

		Current Week 										
				03/06/22	-	03/12/22						
Enrollment		Mon <input checked="" type="checkbox"/>	Tue <input checked="" type="checkbox"/>	Wed <input checked="" type="checkbox"/>	Thu <input checked="" type="checkbox"/>	Fri <input checked="" type="checkbox"/>						
		03/07/22	03/08/22	03/09/22	03/10/22	03/11/22						
1/03/22-6/24/22	(CB2122W0009637)	signed	signed	signed	signed	signed						
9/02/21-6/24/22	(CB2122W0009481)	signed	signed	signed	signed	signed						
9/20/21-6/24/22	(CB2122W0009461)	signed	signed	signed	signed	signed						
9/02/21-6/24/22	(CB2122W0009629)	signed	signed	signed	signed	signed						
											Total Sessions:	20

Signing Classroom Attendance

- * Go to **Attendance > Digital Signature > Sign 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”.

Classroom: Month: County: Provider:

<input type="checkbox"/>	Child Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
<input type="checkbox"/>	[blurred]							Green	Green	Green			Red	Red	Red	Red	Red			Red	Red											
<input type="checkbox"/>	[blurred]							Green	Green	Green			Green	Green	Green	Green	Green			Green	Green											
<input type="checkbox"/>	[blurred]							Green	Green	Green			Red	Green	Red	Green	Green			Green	Green											
<input type="checkbox"/>	[blurred]							Green	Green	Green			Red	Red	Red	Red	Red			Red	Red											
<input type="checkbox"/>	[blurred]							Green	Green	Green			Green	Green	Green	Green	Red			Green	Red											



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:

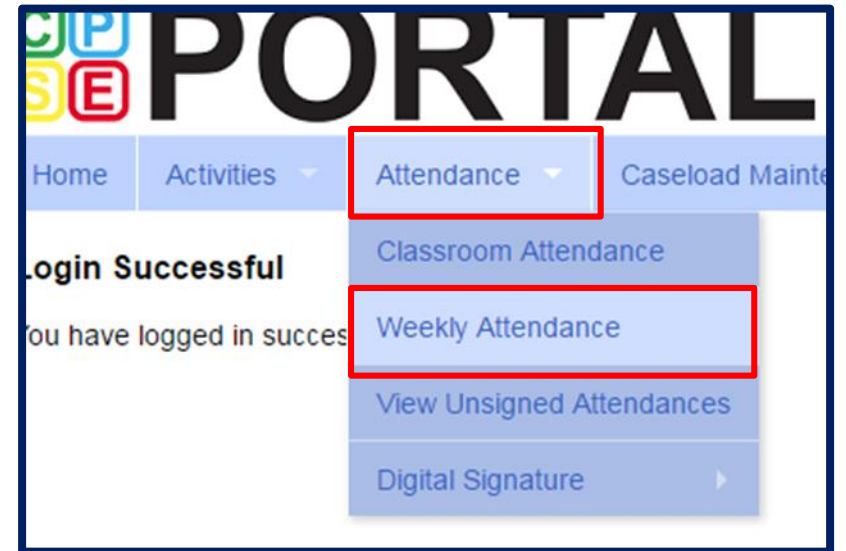
- * Child
- * Service Type
- * Individual vs. Group
- * Date of Service
- * Time In/Time Out
- * Co-Visit with Supervisor
- * Setting
- * Location
- * Entry Type: Provided, Missed or Make-Up
- * ICD 10 Codes
- * CPT Codes
- * Does Not Meet Medicaid Requirements
- * Progress
- * Notes - also referred to as session notes, treatment notes or treatment logs.

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.**

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.

Weekly Attendance

HOFFMAN, KRISTEN Jump To: 02/28/21 Save

<< today >> Feb 28, 2021 - Mar 06, 2021

	Sunday Feb 28, 2021	Monday Mar 01, 2021	Tuesday Mar 02, 2021	Wednesday Mar 03, 2021
7AM				
8AM				
9AM		09:00 am to 09:30 am DUDLEY HARDEN 09:30 am to 10:00 am PRUDENCE THORNTON	08:45 am to 09:15 am JERROD BENTON	09:00 am to 09:30 am DUDLEY HARDEN 09:30 am to 10:00 am PRUDENCE THORNTON
10AM		10:05 am to 10:35 am FREDRICK POWERS 10:45 am to 11:15 am ERNEST FOSTER	10:05 am to 10:35 am TAD STOVALL 10:45 am to 11:15 am LOWELL HOLBROOK	10:10 am to 10:40 am FREDRICK POWERS
11AM		11:40 am to 12:10 pm DOLLA AND MONTALVO	11:20 am to 11:50 am PAULINE PEOPLES	11:15 am to 11:45 am JERROD BENTON

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

New Session for Mar 13, 2023

Time In: 08:00 AM Time Out: 08:30 AM Setting: Not Selected

Bill this session as: 1 x minute session(s) Location:

Co-Visit with Supervisor

[Child 1]

Enrollment: Not Selected

ESID	Nickname	Service Type	Frequency

Entry Type: [v]

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

CPT Codes: [Lookup]	Units:
♥ []	[]
♥ []	[]
♥ []	[]
♥ []	[]
♥ []	[]

Does Not Meet Medicaid Requirements

Progress: No Progress Limited Progress Progress

Session Notes:

Signature: Kelly Knowles **CoSignature Required**

Profession: License: NPI:

save cancel

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.

The screenshot shows a web form titled "New Session for Mar 5, 2021". The form contains several input fields and a checkbox. Three red rectangular boxes highlight specific areas: the first box encloses the "Time In" field (11:15) and its AM/PM dropdown (AM), the "Time Out" field (11:30) and its AM/PM dropdown (AM), and the "Setting" dropdown menu which is currently set to "Daycare". The second box encloses the "Location" dropdown menu which is currently set to "Little Red Schoolhouse, Hurley, NY". The "Bill this session as:" field is set to "1" x30 minute session(s). There is also an unchecked checkbox for "Co-Visit with Supervisor".

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

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

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) Location: Little Red Schoolhouse, Hurley, NY

Co-Visit with Supervisor

[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) Location: Little Red Schoolhouse, Hurley, NY

Co-Visit with Supervisor

[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

[AYERS, ISABELL] Child: AYERS, ISABELL 2x30 - ST - I 09/09/20 - 06/25/21

Entry Type: **Provided Treatment Session** ▼

[AYERS, ISABELL] Child: AYERS, ISABELL 2x30 - ST - I 09/09/20 - 06/25/21

Entry Type: **Missed Treatment Session** ▼

[AYERS, ISABELL] Child: AYERS, ISABELL 2x30 - ST - I 09/09/20 - 06/25/21

Entry Type: **Make Up Session** ▼ Make Up for:

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: <u>John Smith</u>	Service Type: <u>Speech Therapy</u>
Date: <u>December 10, 2015</u>	Location: <u>Springdale Elementary</u>
Time in/Time out: <u>10:00am /10:30am</u>	Indiv (I) Group (G) (incl # in group): <u>I</u>
Practitioner Name: <u>Martha Clark</u>	
Session Note: <u>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.</u>	
<u>Martha Clark</u> TSHH Practitioner's signature, title, and credentials	<u>King Emer, SLP 1/8/16</u> 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

[ADAM, ENRIQUE]

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

ESID CBR2223W0101481 Nickname

Service Type ST Frequency 2 x 30

Entry Type: Missed Treatment Session

♥ Diagnosis Code(s):
NOICD

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

Does Not Meet Medicaid Requirements

Attendance Entry – Missed Treatment Session

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

Weekly Attendance

Knowles, Kelly Jump To: 03/12/23 Save

<< today >> Mar 12, 2023 - Mar 18, 2023

	Sunday Mar 12, 2023	Monday Mar 13, 2023	Tuesday Mar 14, 2023	Wednesday Mar 15, 2023	Thursday Mar 16, 2023	Friday Mar 17, 2023	Saturday Mar 18, 2023
7AM							
8AM							
9AM		09:00 am to 09:30 am ANTONIO	09:00 am to 09:30 am HILARY				
10AM							
11AM							
12PM							

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.

New Session for Mar 13, 2023

Time In: 10:00 AM Time Out: 10:15 AM Setting: Not Selected

Bill this session as: 0.25 x60 minute session(s) Location:

Co-Visit with Supervisor

[REDACTED], HILLARY] Enrollment: HILLARY 1x60 MONTHLY - PNT - I 01/03/23 - 06/23/23

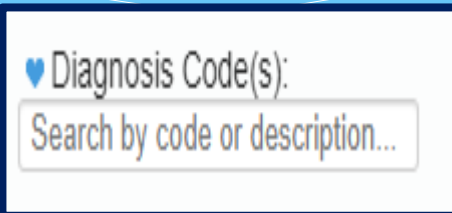
ESID CBRS2223W0106721 Nickname

Service Type PNT Frequency 1 x 60

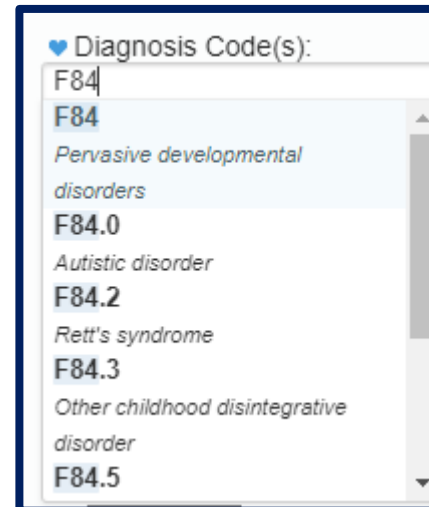
Entry Type: **Make Up Session** Make Up for: 03/09/2023

Attendance Entry – Diagnosis Code

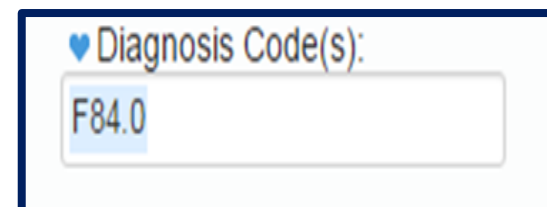
- * Type the start of the diagnosis code (or entire code)... pause for a second for list to fill... choose code.
- * Once chosen, the code will show in the text box highlighted in light blue.
- * To add a second code, repeat the process.



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



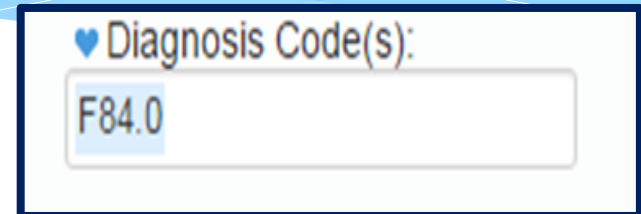
♥ Diagnosis Code(s):
F84
F84
Pervasive developmental disorders
F84.0
Autistic disorder
F84.2
Rett's syndrome
F84.3
Other childhood disintegrative disorder
F84.5



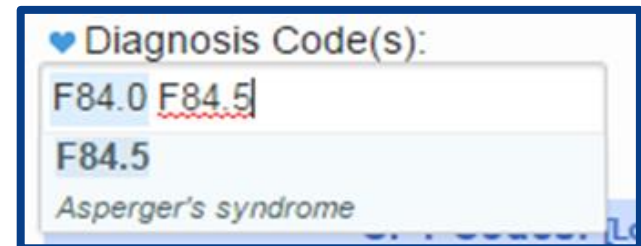
♥ Diagnosis Code(s):
F84.0

Attendance Entry – Additional Diagnosis Codes

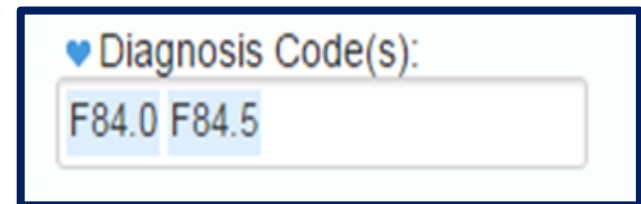
- * To add additional ICD codes:
 - * Click the blank space to the right of the last diagnosis code displayed.
 - * Type the new code... when the list appears... select the correct one.
 - * The additional codes will be displayed in the text box.



♥ Diagnosis Code(s):
F84.0



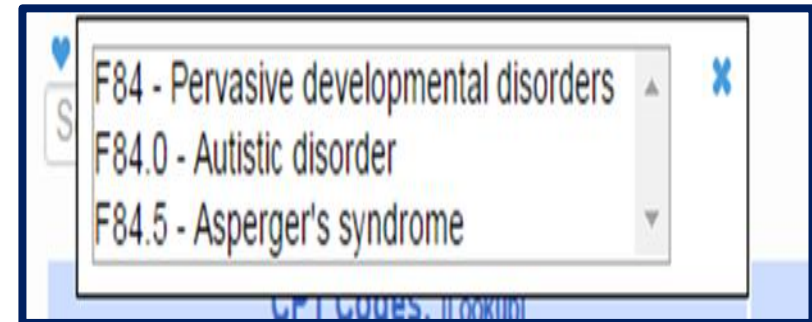
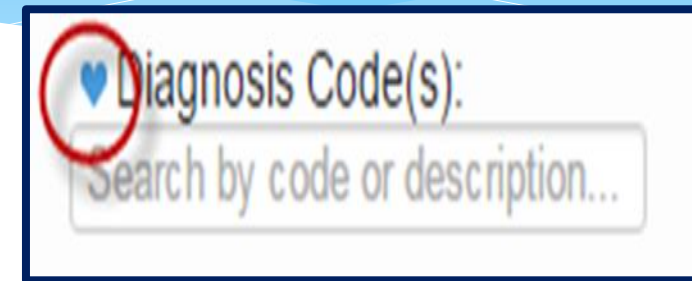
♥ Diagnosis Code(s):
F84.0 F84.5
F84.5
Asperger's syndrome



♥ 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.

CPT Codes: [Lookup]		Units:
<input type="text" value="92507"/>	TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/ OR AUDITORY PROCESSING DISORDER; INDIVIDUAL	<input type="text" value="1"/>
<input type="text"/>		<input type="text"/>

CPT Codes: [Lookup]		Units:
<input type="text" value="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	<input type="text" value="2"/>
<input type="text" value="97110"/>	THERAPEUTIC PROCEDURE, ONE OR MORE AREAS, EACH 15 MINUTES; THERAPEUTIC EXERCISES TO DEVELOP STRENGTH AND ENDURANCE, RANGE OF MOTION AND FLEXIBILITY	<input type="text" value="1"/>
<input type="text"/>		<input type="text"/>

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 un-sign your attendance, then the child is likely on a billing voucher, and needs to be removed.

Monday May 02, 2016	Tuesday May 03, 2016	Wednesday May 04, 2016	Thursday May 05, 2016	Friday May 06, 2016
			09:00 am to 09:30 am MAGDALENA DELONG	
	09:45 am to 10:15 am TRACY CRAIN	09:20 am to 09:50 am JOSEFA LEVINE	10:00 am to 10:30 am TRACY CRAIN	
		10:10 am to 10:40 am MAGDALENA DELONG	10:35 am to 11:05 am TRACEY FELICIANO	
	11:00 am to 11:30 am BRAIN LEVY	11:00 am to 11:30 am BRAIN LEVY	11:30 am to 12:00 pm BRAIN LEVY	
	12:00 pm to 12:30 pm TRENT MCCORMACK	12:00 pm to 12:30 pm TRENT MCCORMACK		
	01:00 pm to 01:30 pm MAGDALENA DELONG	01:00 pm to 01:30 pm TRACEY FELICIANO	12:45 pm to 01:15 pm JOSEFA LEVINE	
		01:35 pm to 02:05 pm TRACY CRAIN		
	02:30 pm to 03:00 pm RENE ORTEGA	02:30 pm to 03:00 pm RENE ORTEGA		

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.

New Session for Jun 20, 2016

Time In: 09:15 AM Time Out: 09:45 AM Setting: Preschool

1 x 30 minute session(s)

Co-Visit with Supervisor

Number of Children in Group: 3

[BERTRAND, GORDON]
[BIRCH, BRENT]
[Child 3]
[Child 4]
[Child 5]

Child 2: BIRCH, BRENT 2x30 - ST - G 12/21/15 - 06/24/16

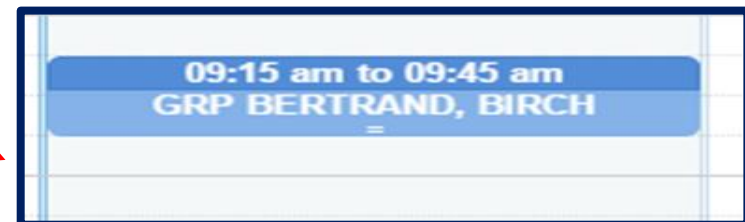
♥ Diagnosis Code(s):
Search by code or description...

CPT Codes: [Lookup] Units:

[BERTRAND, GORDON]
[BIRCH, BRENT]
[Child 3]
[Child 4]
[Child 5]

Child 3: Not Selected

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



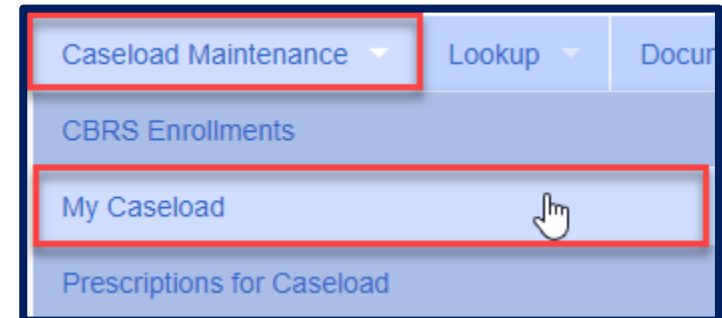


Creating Defaults for Session Notes

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.***



Creating Defaults

- * Click on the “*Defaults*” button at the end of the enrollment.

My Caseload

Filter By

Provider:

Session: 2021 - 2022 Winter

Search

	Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned		
<input type="checkbox"/>		RS2122W0016895	BOYKIN	MATTIE	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	01/20/22	06/24/22	ST 2x30 Individual		Attendances	Defaults
<input type="checkbox"/>		RS2122W0016896	BOYKIN	MATTIE	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	01/20/22	06/24/22	ST1 1x30 Group		Attendances	Defaults
<input type="checkbox"/>		RS2122W0016596	BROUSSARD	DENVER	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	09/07/21	01/04/22	ST 2x30 Individual		Attendances	Defaults
<input type="checkbox"/>		RS2122W0016597	BROUSSARD	DENVER	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	09/07/21	01/04/22	ST1 1x30 Group		Attendances	Defaults

Creating Defaults

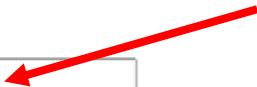
- * Now you will enter:
 - * Service Setting
 - * Location
 - * Default CPT Code
 - * Default ICD 10 Code
- * You can also enter an enrollment note. Here you can enter the goals off of the IEP, and the goals will then populate to each session note. You can then adjust as needed.

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 30 minute session(s) for a total duration of 30 minutes.

Service Setting: Location:

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
	<input type="text"/>		<input type="text"/>	Add

Default ICD10 Code for new attendance

	ICD 10 Code	Description	
Edit	F80.2	Mixed receptive-expressive language disorder	Delete
	<input type="text"/>		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.

New Session for Jun 10, 2022

Time In: Time Out:

Bill this session as: x30 minute session(s)

Co-Visit with Supervisor

Setting:

Location:

[BOYKIN, MATTIE]

Child:

Entry Type:

Diagnosis Code(s):

CPT Codes: [Lookup]		Units:
<input type="text" value="92507"/>	TREATMENT OF SPEECH, LANGUAGE, VOICE, COMMUNICATION, AND/ OR AUDITORY PROCESSING DISORDER; INDIVIDUAL	<input type="text" value="1"/>
<input type="text"/>		<input type="text"/>
<input type="text"/>		<input type="text"/>
<input type="text"/>		<input type="text"/>
<input type="text"/>		<input type="text"/>

Does Not Meet Medicaid Requirements

Progress: No Progress Limited Progress Progress

Session Notes:



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:

Password Verification

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

Password



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.

PIN Selection

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

PIN Number:

Save PIN

PIN Selection

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

PIN Number:

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.

Profile


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


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

Edit  **Credentials:**

Status	Profession Code	Description	Credential Type	#	State	From	To
	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

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.


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
	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)

Audit | By Week | By Enrollment

Status	Child	Date of Service	Time In	Time Out	
	HESTER, DEWITT	1/11/2022	09:40	10:10	<input type="button" value="Edit"/>
	PERSON, LIBERTY	6/18/2020	01:00	01:30	<input type="button" value="Edit"/>
	RHODES, BOBBIE	1/18/2022	11:35	12:05	<input type="button" value="Edit"/>
	RHODES, BOBBIE	1/20/2022	11:30	12:00	<input type="button" value="Edit"/>
	RHODES, BOBBIE	1/21/2022	09:40	10:10	<input type="button" value="Edit"/>

Review and Sign

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

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
⚠	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

Issues Found With Attendance:

Issue Type	Description	Data Causing Issue
WARNING	Exceeds Weekly Frequency for Enrollment	Enrollment Frequency: 2x30

Ok

Review and Sign

- * Click “*Edit*”, and make appropriate changes to session note.

Unsigned Attendances

School Year Session: (School Year Session) ▾

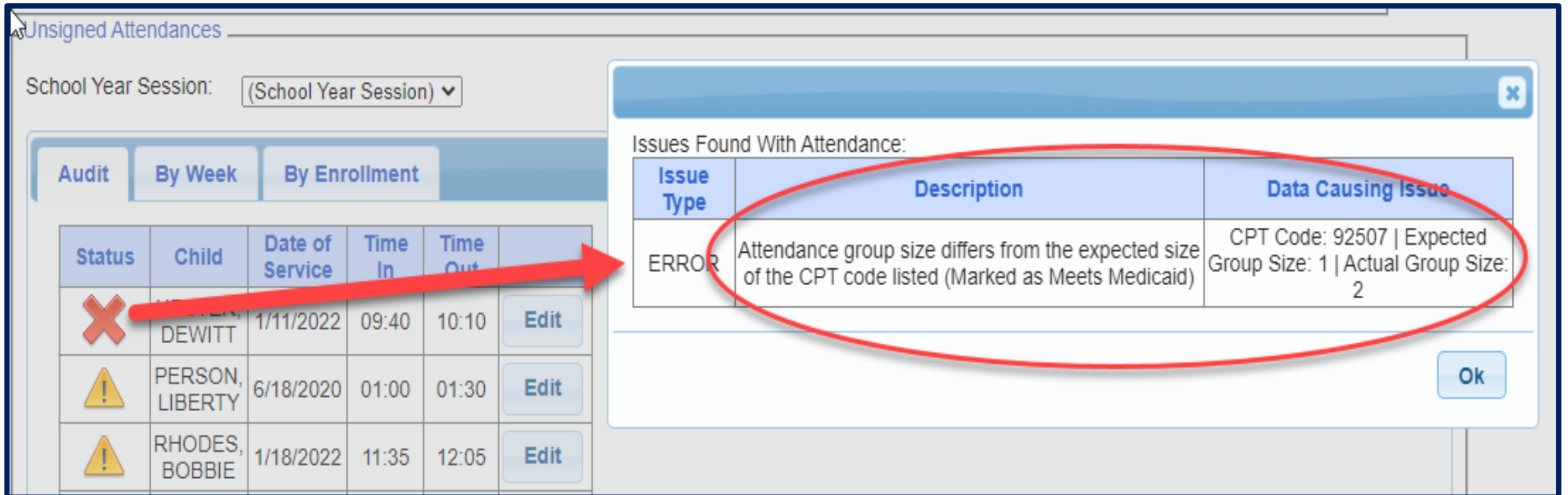
Audit By Week By Enrollment

Status	Child	Date of Service	Time In	Time Out	
✘	PERSON, 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

Issues Found With Attendance:

Issue Type	Description	Data Causing Issue
ERROR	Attendance group size differs from the expected size of the CPT code listed (Marked as Meets Medicaid)	CPT Code: 92507 Expected Group Size: 1 Actual Group Size: 2

Ok



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.


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
	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)

Audit **By Week** By Enrollment

Start Date	End Date	Number Of Unsigned Attendances	Navigation
10/27/2019	11/02/2019	1	Review And Sign
06/14/2020	06/20/2020	1	Review And Sign
01/02/2022	01/08/2022	28	Review And Sign
01/09/2022	01/15/2022	34	Review And Sign
01/16/2022	01/22/2022	30	Review And Sign

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.

Unsigned Attendances

Showing Attendances for the week of: 10/27/2019 - 11/2/2019 [Sign](#)

Sunday (0)
 Monday (1)
 Tuesday (0)
 Wednesday (0)
 Thursday (0)
 Friday (0)
 Saturday (0)

<input type="checkbox"/>	Status	Child Name	ESID	Service Type	Service Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes	
<input type="checkbox"/>		BENTON, JERROD	RS1920W0022957	ST	10/28/19	08:00 AM	08:30 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		CHERRY, YONG	RS1920W0014784	ST	10/28/19	09:00 AM	09:30 AM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		WINTERS, LEANORA	RS1920W0014352	ST	10/28/19	09:45 AM	10:15 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		DAVILA, FOSTER	RS1920W0014799	ST	10/28/19	10:35 AM	11:05 AM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		OAKES, CHERYL	RS1920W0022741	ST	10/28/19	11:30 AM	12:00 PM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		NORWOOD, ROSSANA	RS1920W0022744	ST	10/28/19	12:15 PM	12:45 PM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		KRAUSE, EVON	RS1920W0014555	ST1	10/28/19	12:50 PM	01:20 PM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		SALDANA, DONN	RS1920W0014569	ST	10/28/19	01:20 PM	01:50 PM	30	1.00	30	30	92507 (x1)	F80.2	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		HONG, IRA	RS1920W0022745	ST	10/28/19	01:55 PM	02:25 PM	30	1.00	30	30	92507 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	
<input type="checkbox"/>		DAVILA, FOSTER	RS1920W0014800	COR	10/28/19	04:00 PM	04:30 PM	30	1.00	30	30	99366 (x1)	F80.0	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	Edit


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.


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
	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**

Child	ESID	Service Month	Service	Number Of Unsigned Attendances	Navigation
BROUSSARD, DENVER	RS2122W0016884	January 2022	ST	2	Review And Sign
BROUSSARD, DENVER	RS2122W0016885	January 2022	ST1	4	Review And Sign
DAVILA, FOSTER	RS1920W0014800	October 2019	COR	1	Review And Sign
DELATORRE, CARINA	RS2122W0016811	January 2022	ST	2	Review And Sign
DUFF, TOD	RS2122W0016554	January 2022	ST	6	Review And Sign
ERWIN, DEANDRA	RS2122W0016902	January 2022	ST	2	Review And Sign
ERWIN, DEANDRA	RS2122W0016903	January 2022	ST1	2	Review And Sign
FOSTER, ERNEST	RS2122W0016162	January 2022	ST	2	Review And Sign
FOSTER, ERNEST	RS2122W0016888	January 2022	ST	1	Review And Sign
FOSTER, ERNEST	RS2122W0016889	January 2022	ST1	2	Review And Sign

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.



Enrollment Info

Child Name: BROUSSARD, DENVER ESID: RS2122W0016884
Service Type: Speech Therapy IND Frequency: 1x30
Dates: 01/05/22 - 06/24/22 Status: OK

January 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Sign Attendance 

<input type="checkbox"/>	Status	Service Date	Time In	Time Out	Duration	Sessions To Bill	Minutes Per Session	Minutes To Bill	CPT Codes	ICD Codes	Notes	<input type="checkbox"/>
<input type="checkbox"/>		01/10/22	11:15 AM	11:45 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="checkbox"/>
<input type="checkbox"/>		01/18/22	09:30 AM	10:00 AM	30	1.00	30	30	92507 (x1)	F80.0, F80.1	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="checkbox"/>

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:

Signing As:

NPI:

Date:

Pin:

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**



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

Filter:

Service Provider: DELISA DAVISON

Child: CORRIE CREWS

Service Type: PT

Month: January 2022

<input type="checkbox"/>	Service Date	Service Setting	CoVisit Therapist	Make Up For	Start Time	End Time	CPT Codes	ICD Code	Notes	<input type="button" value="View"/>
<input type="checkbox"/>	1/12/2022	Teletherapy	PLUMMER, SHERILL		12:00 PM	12:30 PM	97530	R62.50	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>
<input type="checkbox"/>	1/14/2022	Therapy Room			12:15 PM	12:45 PM	97530	R62.50	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>
<input type="checkbox"/>	1/18/2022	Therapy Room			12:30 PM	1:00 PM	97530	R62.50	Notes for training purposes. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sit amet interdum nunc. In quis scelerisque mauris. Donec congue mauris ut tincidunt molestie. Nunc dapibus pretium metus, sit amet finibus ipsum finibus sed.	<input type="button" value="View"/>

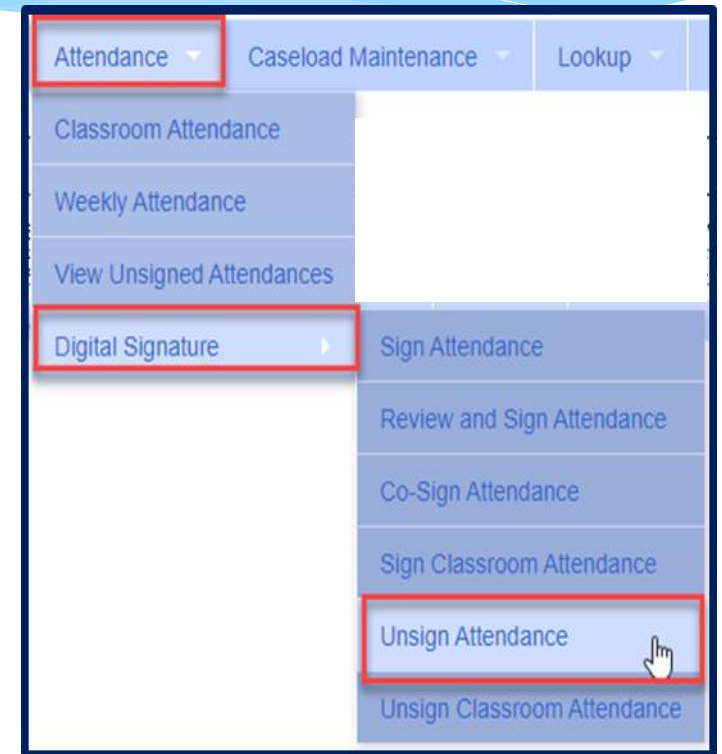




Un-signing Attendance / Making Corrections After Signed

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

From Date: To Date: Enrollment: County: Provider:

<input type="checkbox"/>	Last Name	First Name	Service Date	Start Time	End Time	CPT Codes	Notes
<input type="checkbox"/>			2/01/2022	10:00 AM	10:30 AM	97530	Devin engaged in fine motor activities. He was positioned to work on the floor to engage core working in tall kneel and quad coordination. He was building his own structures not replicating designs or patterns. He was more accepting of therapist work.
<input type="checkbox"/>	E		2/01/2022	10:30 AM	11:00 AM	97530	Teo transitioned easily to the motor room. He engaged in a sensorimotor obstacle course incorporating climbing and sliding. table for a sensory experience while using magnet blocks working on hand strength and bilateral hand coordination. Teo enjoyed

- * 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.

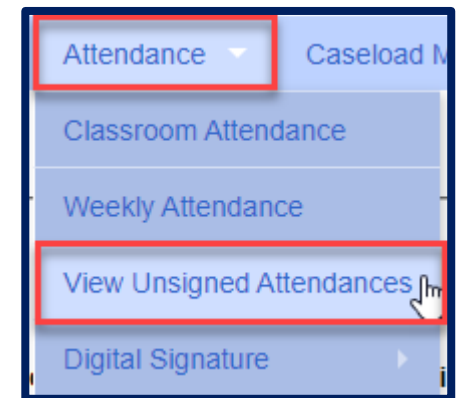
By entering my pin number, I/We certify that on the dates selected, the selected services, which I previously verified and signed, were not accurate, and must be changed in order to accurately reflect the services that took place for the specified children on the specified dates.

Reason for unsigning

Pin

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.



Unsigned Attendances										
Last Name	First Name	Service Date	Start Time	End Time	Attendance Type	Enrollment Type	RS Type	Service Provider	ESID	
AYERS	ISABELL	3/18/2020	11:00 AM	11:15 AM						Delete



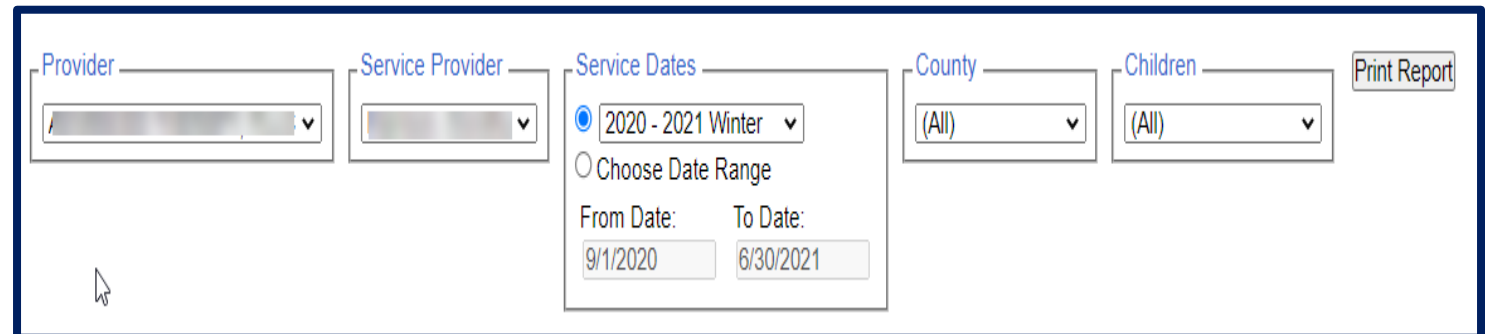
Printing Logs

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)

A screenshot of the filter form for the Child Treatment Log report. The form includes several dropdown menus and a 'Print Report' button. The 'Provider' and 'Service Provider' dropdowns are currently blank. The 'Service Dates' dropdown is set to '2020 - 2021 Winter', with radio buttons for 'Choose Date Range' and 'From Date: 9/1/2020' and 'To Date: 6/30/2021'. The 'County' dropdown is set to '(All)' and the 'Children' dropdown is also set to '(All)'. A mouse cursor is visible over the 'Print Report' button.

Child Treatment Log



Child Treatment Log

Printed: 5/28/2021 8:25:51 AM

Page 1 of 2

09/01/2020 - 06/30/2021

ESID: CBRS2021W Occupational Therapy- Individual

Child: C

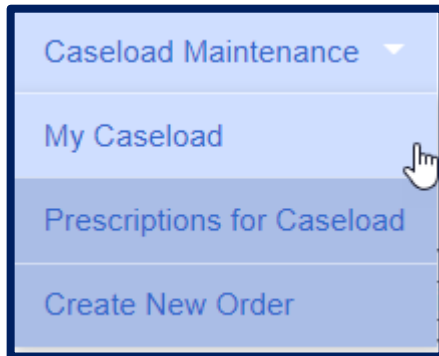
Date of Birth: E

Therapist: Do

Date / Time	Setting	ICD/CPT Codes	Notes	
04/16/21 In: 10:05AM Out: 10:35AM	Universal Pre-K Classroom	F82 97530x2	Student engaged in fine motor tabletop task tracing three various shapes, triangle, circle and square with modified tripod grasp and 1 vc to stay on boundary line while tracing to increase coordination followed by coloring each shape according to color chart with minimal whole space when coloring and 1 vc to color within boundary lines.	Notes Entered: 5/4/2021 9:12:26 AM Notes Last Modified: 5/4/2021 9:12:26 AM Signed: 5/4/2021 D OTA Cosigned: 5/5/2021 K MSOTR/L Meets Medicaid Requirements: Yes
05/04/21 In: 12:00PM Out: 12:30PM	Universal Pre-K Classroom	F82 97530x2	Student engaged in fine motor task tracing various shapes with right modified tripod grasp with 1 vc to stay on boundary lines when tracing followed by coloring each shape with 1 vc to slow down to increase motor coordination in right dominant hand. Composed first three letters in first name independently with visual model of rest of letters in first name due to difficulty with formation of letter y with directionality.	Notes Entered: 5/7/2021 11:00:51 AM Notes Last Modified: 5/7/2021 11:00:51 AM Signed: 5/7/2021 D A Cosigned: NOT COSIGNED Meets Medicaid Requirements: Yes

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.



My Caseload

Filter By: Provider: [dropdown] Session: [2020 - 2021 Winter] Search [button]

Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned		
<input checked="" type="checkbox"/>	CBF	C		COLUMBIA		Taconic Hills CSD	CBRS	04/12/21	06/24/21	OT 2x30 Individual	YES	Attendances	Defaults
<input type="checkbox"/>	CBF	J		COLUMBIA		KINDERHOOK CSD	CBRS	09/08/20	06/24/21	OT 2x30 Individual	YES	Attendances	Defaults

Excel [button] Generate Blank Signature Logs for Selected Enrollments [button]

Generate Parent/Guardian Signature Logs

Choose one of the following options for log generation:

Don't specify month


One for each month

These Months:

Month
<input type="checkbox"/> Sep 20
<input type="checkbox"/> Oct 20
<input type="checkbox"/> Nov 20
<input type="checkbox"/> Dec 20
<input type="checkbox"/> Jan 21
<input type="checkbox"/> Feb 21
<input type="checkbox"/> Mar 21
<input type="checkbox"/> Apr 21
<input type="checkbox"/> May 21
<input type="checkbox"/> Jun 21

Generate [button]

Print Parent Signature Log



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 Patholo	License 008342	NPI 1508012717

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

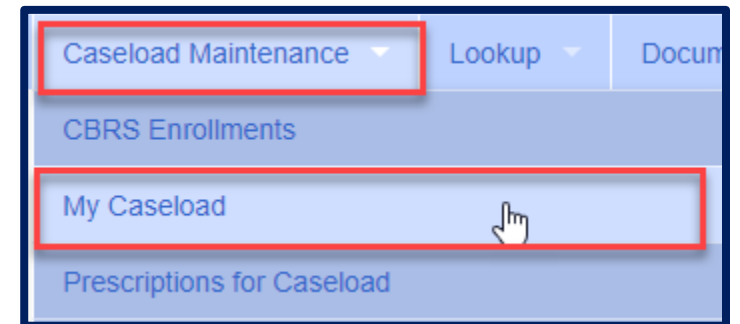
Service Codes: P-Service Provided, CA-Child Absent, TA-Teacher Absent, MU-Makeup



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.



View Caseload

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

My Caseload

Filter By

Provider: Session:

	Status	ESID	Last Name	First Name	County	Provider	District	Type	From	To	Service	Assigned		
<input type="checkbox"/>		RS2122W0016895	BOYKIN	MATTIE	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	01/20/22	06/24/22	ST 2x30 Individual		Attendances	Defaults
<input type="checkbox"/>		RS2122W0016896	BOYKIN	MATTIE	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	01/20/22	06/24/22	ST1 1x30 Group		Attendances	Defaults
<input type="checkbox"/>		RS2122W0016596	BROUSSARD	DENVER	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	09/07/21	01/04/22	ST 2x30 Individual		Attendances	Defaults
<input type="checkbox"/>		RS2122W0016597	BROUSSARD	DENVER	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	09/07/21	01/04/22	ST1 1x30 Group		Attendances	Defaults
<input type="checkbox"/>		RS2122W0016884	BROUSSARD	DENVER	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	01/05/22	06/24/22	ST 1x30 Individual		Attendances	Defaults
<input type="checkbox"/>		RS2122W0016885	BROUSSARD	DENVER	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	01/05/22	06/24/22	ST1 2x30 Group		Attendances	Defaults

View Caseload

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

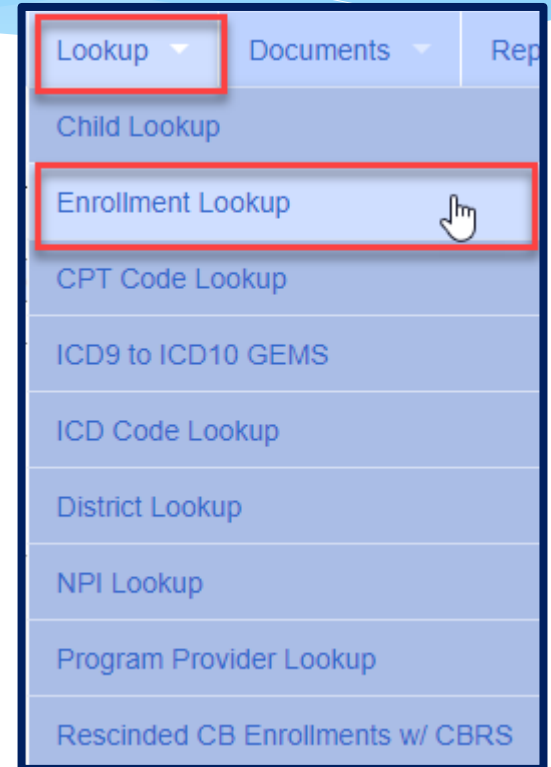
Attendance List

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**



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.

Enrollments

School Year Session County CBRS

Provider RS SEIT CB

Status	ESID	Last Name	First Name	DOB	County	Provider	District	Enroll Type	RS Type	Start	End	Frequency	Indiv / Grp	Program	1:1	Rate	Sessions Billed	SED Weeks Enrolled	Calendar Weeks Enrolled	Maximum Sessions	
	RS2122W0016895	BOYKIN	MATTIE	12/6/2016	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST	1/20/2022	6/24/2022	2x30	I	9200-2		51.50	0.00	21	23	42	Attendances
	RS2122W0016896	BOYKIN	MATTIE	12/6/2016	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST1	1/20/2022	6/24/2022	1x30	G	9200-2		51.50	0.00	21	23	21	Attendances
	RS2122W0016596	BROUSSARD	DENVER	3/5/2017	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST	9/7/2021	1/4/2022	2x30	I	9200-2		51.50	30.00	16	18	32	Attendances
	RS2122W0016597	BROUSSARD	DENVER	3/5/2017	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST1	9/7/2021	1/4/2022	1x30	G	9200-2		51.50	14.00	16	18	16	Attendances
	RS2122W0016884	BROUSSARD	DENVER	3/5/2017	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST	1/5/2022	6/24/2022	1x30	I	9200-2		51.50	0.00	24	25	24	Attendances
	RS2122W0016885	BROUSSARD	DENVER	3/5/2017	SCHENECTADY	GEBAUER,BETTY	Schenectady	RS	ST1	1/5/2022	6/24/2022	2x30	G	9200-2		51.50	0.00	24	25	48	Attendances
	RS2122W0016811	DELATORRE	CARINA	8/14/2017	SCHENECTADY	GEBAUER,BETTY	SCHALMONT CSD	RS	ST	11/29/2021	6/24/2022	2x30	I	9200-2		51.50	8.00	28	30	56	Attendances
	RS2122W0016554	DUFF	TOD	1/18/2018	SCHENECTADY	GEBAUER,BETTY	ROTTERDAM-MOHONASEN CSD	RS	ST	9/7/2021	6/24/2022	2x30	I	9200-2		51.50	20.00	40	42	80	Attendances

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 #	Treatment Log
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>

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