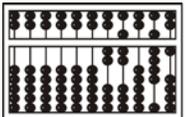


# CPSE Portal

Entering Attendance



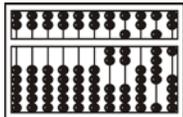
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# Webinar Getting Started

CPSE Portal is located at

<https://www.cpseportal.com/>

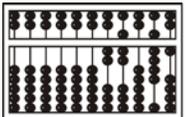


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# Webinar Outline

- ▶ Billing Overview
- ▶ Provider PIN
- ▶ Creating a Voucher
- ▶ Print Voucher Summary
- ▶ Submitting a Voucher
- ▶ Viewing Attendance Details
- ▶ Matching Children Enrollments
- ▶ Moving Attendance between Enrollments
- ▶ Rescinded Enrollments

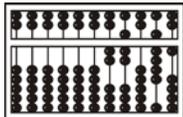


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**S E** **PORTAL**

# Resources

- ▶ Email [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
- ▶ CPSE Portal support site <http://support.cpseportal.com>
  - ▶ Knowledge Base Articles
- ▶ Knowledge Base Menu from [www.CPSEPortal.com](http://www.CPSEPortal.com)

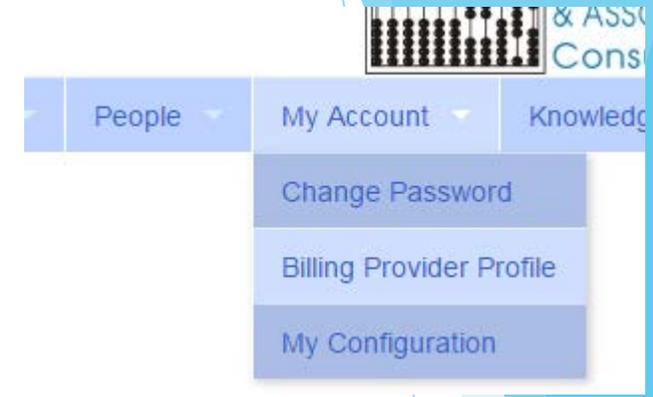


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# Provider PIN

- ▶ Navigate to Billing Provider Profile under the My Account menu
- ▶ Select the PIN tab
- ▶ Enter your PIN and click "Create PIN"



## Billing Provider Profile

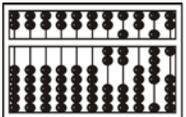
**NPI Registry**   **User Information**   **PIN** 

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

PIN Number:  [Create PIN](#)

# Billing Overview

- ▶ Attendance Gets Entered
- ▶ Attendances Signed (and co-signed if necessary)
- ▶ Empty Voucher is created
- ▶ User adds items to voucher
- ▶ User reviews the voucher
- ▶ User digitally submits voucher(s) to County using their Provider PIN
- ▶ User prints out Voucher Summary
- ▶ User mails Voucher Summary to County

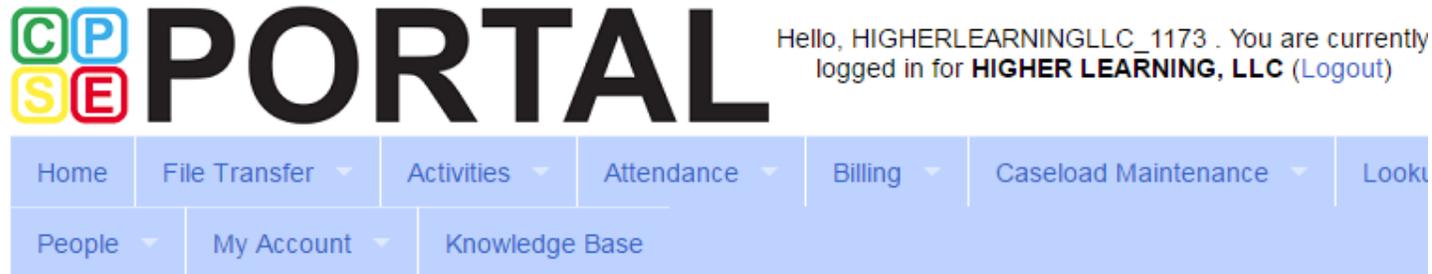
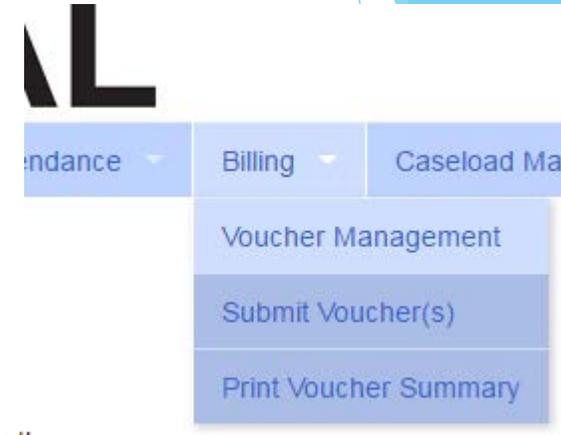


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# Creating an Empty Voucher

- ▶ Navigate to Voucher Management screen under the Billing menu
- ▶ Click the Create Voucher Button



## Pending Vouchers



# Creating Voucher

- ▶ Select County
- ▶ Select Type (RS, SEIT, CB, CBRs)
- ▶ Select School Year & Session
- ▶ Voucher # is created for you
- ▶ Billing Date is the date you plan to mail to the County
- ▶ Description is to help describe what will be on the voucher (ex. July 2016 Speech)
- ▶ Authorized Claimant is name of individual representing the Provider. For an independent provider this is the therapist. For an agency, typically this is the Owner, President, Director, etc.
- ▶ Claimant Title would be the title of the claimant (ex. President)

**Create/Edit Voucher**

**Parameters**

ERIE ▼ RS ▼ (School Year Session) ▼

**Info**

Voucher #  Description

Billing Date  Claimant Title

Authorized Claimant

# Create Voucher - Calculates potential items

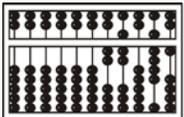
- ▶ Looks for any attendance that
  - ▶ Is associated with at County created enrollment (has an ESID/is matched)
  - ▶ Has been signed (has a signed date)
  - ▶ Has been co-signed or determined to not need a cosignature (has a co-signed date)
  - ▶ Is not on another voucher already
- ▶ Groups those attendances by enrollment (ESID) and Service month and calculates an amount for that month for that enrollment.

# Adding Details to the Voucher

- ▶ After initially creating the voucher, all the pending (not yet submitted to County) will appear on the Voucher Management Screen
- ▶ Info button allows you to edit the Billing Date, Description, Claimant and Title
- ▶ Details button takes you to the voucher details screen where you and can add items to the voucher.

**Pending Vouchers**

Voucher #	Bill Date	Type	County	Session	Description	Enroll. Count	Total Billed				
RS160731064142	8/1/2016	RS	ERIE	2016 - 2017 Summer	July 2016 Occupational Therapy	0	\$0.00	<input type="button" value="Info"/>	<input type="button" value="Details"/>	<input type="button" value="Recalc"/>	<input type="button" value="Delete"/>
RS160731064200	8/1/2016	RS	ERIE	2016 - 2017 Summer	July 2016 Speech	0	\$0.00	<input type="button" value="Info"/>	<input type="button" value="Details"/>	<input type="button" value="Recalc"/>	<input type="button" value="Delete"/>
RS160731064211	8/1/2016	RS	ERIE	2016 - 2017 Summer	July 2016 Physical Therapy	0	\$0.00	<input type="button" value="Info"/>	<input type="button" value="Details"/>	<input type="button" value="Recalc"/>	<input type="button" value="Delete"/>



# Voucher Details

## Voucher Details

### Info

Voucher #: RS160731064142

Billing Date: 8/1/2016

Authorized Claimant: Mary Jones

### Voucher header information

Description: July 2016 Occupational Therapy

Claimant Title: Executive Director

Service month filter    Service Type filter

July 2016  
July 2016

Program (Service)  
 9200

Filter

Unassigned

A=Adjustment    R=Regular

<input type="checkbox"/>	Last Name	First Name	Month	Sessions	Amount	Svc	ESID
<input type="checkbox"/>	ASH	SON	July 2016	6	\$300.00 (R)	ST	RS1617S0083825
<input type="checkbox"/>	BERMAN	MARCELINA	July 2016	7	\$350.00 (R)	ST	RS1617S0083262
<input type="checkbox"/>	BLUM	MERYL	July 2016	2	\$100.00 (R)	PT	RS1617S0083935
<input type="checkbox"/>	BRADLEY	GILBERT	July 2016	4	\$200.00 (R)	OT	RS1617S0084047
<input type="checkbox"/>	BREWSTER	RAMON	July 2016	5	\$250.00 (R)	ST	RS1617S0083820
<input type="checkbox"/>	BUSTAMANTE	RICHARD	July 2016	5	\$250.00 (R)	ST	RS1617S0084049
<input type="checkbox"/>	BYRD	BRITTANI	July 2016	1	\$50.00 (R)	ST	RS1617S0084015
<input type="checkbox"/>	CALHOUN	KRISTAL	July 2016	5	\$375.00 (R)	ST	RS1617S0083260
<input type="checkbox"/>	CAMPOS	CAREY	July 2016	4	\$200.00 (R)	ST	RS1617S0083934
<input type="checkbox"/>	CARUSO	LOWELL	July 2016	4	\$200.00 (R)	ST	RS1617S0083928

Assigned = items on voucher

Assigned

<-- Unassign

If you are looking for entries that are not appearing, try clicking "recalc"!

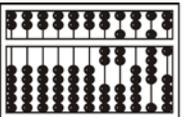
Assign -->

Return to Voucher Management

Recalc

Save

Amount Billed: \$0.00



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# Adding items to Voucher

- ▶ Select the Service Month(s) you want to include
- ▶ Select the Service Type(s) you want to include
- ▶ Click "Filter"
- ▶ Select (click the check box) the rows that you want to include
- ▶ Click "Assign" to add them to the Voucher

**Voucher Details**

**Info**

**Voucher #:** RS160731064142

**Billing Date:** 8/1/2016

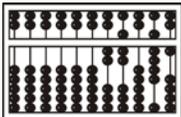
**Authorized Claimant:** Mary Jones

**Service month filter** **Service Type filter**

July 2016  Program ST  9200  **Unassigned**

<input checked="" type="checkbox"/>	Last Name	First Name	Month	Sessions	Amount	Svc	ESID
<input checked="" type="checkbox"/>	ASH	SON	July 2016	6	\$300.00 (R)	ST	RS1617S0083825
<input checked="" type="checkbox"/>	BERMAN	MARCELINA	July 2016	7	\$350.00 (R)	ST	RS1617S0083262
<input checked="" type="checkbox"/>	BREWSTER	RAMON	July 2016	5	\$250.00 (R)	ST	RS1617S0083820
<input checked="" type="checkbox"/>	BUSTAMANTE	RICHARD	July 2016	5	\$250.00 (R)	ST	RS1617S0084049
<input checked="" type="checkbox"/>	BYRD	BRITTANI	July 2016	1	\$50.00 (R)	ST	RS1617S0084015
<input checked="" type="checkbox"/>	CALHOUN	KRISTAL	July 2016	5	\$375.00 (R)	ST	RS1617S0083260
<input checked="" type="checkbox"/>	CAMPOS	CAREY	July 2016	4	\$200.00 (R)	ST	RS1617S0083934
<input checked="" type="checkbox"/>	CARUSO	LOWELL	July 2016	4	\$200.00 (R)	ST	RS1617S0083928
<input checked="" type="checkbox"/>	CAVANAUGH	TOMMY	July 2016	8	\$400.00 (R)	ST	RS1617S0083927
<input checked="" type="checkbox"/>	CORREA	NATHAN	July 2016	7	\$350.00 (R)	ST	RS1617S0083698

**If you are looking for entries that are not appearing, try clicking "recalc"!**



# Removing items

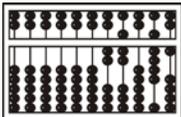
- ▶ To take an item off the voucher select the item in the Assigned list and click the “Unassign” button

A=Adjustment R=Regular

**Assigned**

<input type="checkbox"/>	Last Name	First Name	Service Month	Sessions	Amount Billed	ESID
<input type="checkbox"/>	ASH	SON	July 2016	6	\$300.00 (R)	RS1617S0083825
<input type="checkbox"/>	BERMAN	MARCELINA	July 2016	7	\$350.00 (R)	RS1617S0083262
<input type="checkbox"/>	BREWSTER	RAMON	July 2016	5	\$250.00 (R)	RS1617S0083820
<input type="checkbox"/>	BUSTAMANTE	RICHARD	July 2016	5	\$250.00 (R)	RS1617S0084049
<input type="checkbox"/>	BYRD	BRITTANI	July 2016	1	\$50.00 (R)	RS1617S0084015
<input type="checkbox"/>	CALHOUN	KRISTAL	July 2016	5	\$375.00 (R)	RS1617S0083260
<input type="checkbox"/>	CAMPOS	CAREY	July 2016	4	\$200.00 (R)	RS1617S0083934
<input type="checkbox"/>	CARUSO	LOWELL	July 2016	4	\$200.00 (R)	RS1617S0083928
<input type="checkbox"/>	CAVANAUGH	TOMMY	July 2016	8	\$400.00 (R)	RS1617S0083927
<input type="checkbox"/>	CORREA	NATHAN	July 2016	7	\$350.00 (R)	RS1617S0083698

[<-- Unassign](#)



# Viewing/editing item details

- ▶ You can click the service month on a row to view the details
- ▶ The screen will show the attendance entries that make up that item
- ▶ If there is an issue, you can click edit to change the # of sessions, minutes per session, and amount billed
- ▶ You can also click the check box to include/exclude an entry from this voucher

A=Adjustment R=Regular

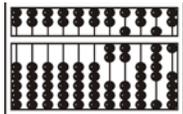
**Assigned**

<input type="checkbox"/>	Last Name	First Name	Service Month	Sessions	Amount Billed	ESID
<input type="checkbox"/>	ASH	SON	July 2016	6	\$300.00 (R)	RS1617S0083825
<input type="checkbox"/>	BERMAN	MARCELINA	July 2016	7	\$350.00 (R)	RS1617S0083262
<input type="checkbox"/>	BREWSTER	RAMON	July 2016	5	\$250.00 (R)	RS1617S0083820
<input type="checkbox"/>	BUSTAMANTE	RICHARD	July 2016	5	\$250.00 (R)	RS1617S0084049
<input type="checkbox"/>	BYRD	BRITTANI	July 2016	1	\$50.00 (R)	RS1617S0084015
<input type="checkbox"/>	CALHOUN	KRISTAL	July 2016	5	\$375.00 (R)	RS1617S0083260
<input type="checkbox"/>	CAMPOS	CAREY	July 2016	4	\$200.00 (R)	RS1617S0083934
<input type="checkbox"/>	CARUSO	LOWELL	July 2016	4	\$200.00 (R)	RS1617S0083928
<input type="checkbox"/>	CAVANAUGH	TOMMY	July 2016	8	\$400.00 (R)	RS1617S0083927
<input type="checkbox"/>	CORREA	NATHAN	July 2016	7	\$350.00 (R)	RS1617S0083698

[<< Unassign](#)

## Attendance Entries for July 2016

Child Name		CAREY CAMPOS		ESID	RS1617S0083934		Service Type	RS ST	Dates	7/1/2016-8/31/2016	Frequency	2x30	Enrollment Rate	\$50.00
Date	Start	End	Duration	Service Provider	Signed	Co-Signed	Voucher	# Sess	Mins/Sess	Total Mins	Amount Billed	Included		
07/18/16	3:15 PM	3:45 PM	30	HISAKO SONG	07/18/16	07/18/16	RS160731064142	2.00	30	30	100.0000	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	
07/20/16	3:15 PM	3:45 PM	30	HISAKO SONG	07/20/16	07/20/16	RS160731064142	1.00	30	30	50.0000	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	
07/25/16	3:15 PM	3:45 PM	30	HISAKO SONG	07/25/16	07/25/16	RS160731064142	1.00	30	30	50.0000	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	
07/27/16	3:15 PM	3:45 PM	30	HISAKO SONG	07/27/16	07/27/16	RS160731064142	1.00	30	30	50.0000	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	



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# Print Voucher Summary

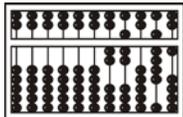
- ▶ Navigate to Print Voucher Summary under the Billing menu
- ▶ Set filters to limit the number of rows and click “Apply Filter”
- ▶ Find the row you are looking for and click the Print link for that row
- ▶ The report will appear in your browser as a PDF file.
- ▶ This file can be viewed, saved as a PDF or printed.

## Print Voucher Summary Reports

..Filter By...

School Year Session:  Enrollment Type:  County:  Billing Month:  Service Month:  Voucher Status:

Voucher #	Enrollment Type	Description	Billing Date	Total Billed	Submitted Date	Claimant Title	Authorized Claimant	Destination County	# Enrollments	Print All Voucher Submission Reports
RS160731064142	RS	July 2016 Occupational Therapy	8/1/2016	\$1,550.00		Director	Mary Jones	ERIE	7	<a href="#">Print</a>
RS160731064200	RS	July 2016 Speech	8/1/2016	\$7,075.00		Director	Mary Jones	ERIE	29	<a href="#">Print</a>
RS160731064211	RS	July 2016 Physical Therapy	8/1/2016	\$750.00		Director	Mary Jones	ERIE	3	<a href="#">Print</a>



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# Voucher Summary



## Voucher Summary

Printed: 7/31/2016 7:56:15 PM

Page 1 of 1

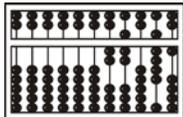
**Provider:** HIGHER LEARNING, LLC  
**Vendor#:**  
**Tax ID:**  
**SED Provider Code:**  
**Bill To County:** ERIE

**Bill Date:** 8/1/2016  
**Voucher#:** RS160731064142  
**Service Month:** July 2016  
**Voucher Description:** July 2016 Occupational Therapy

Child Name	ESID	Frequency	Service	Dates Of Service	Rate	Units	Minutes Per Unit	Amount
BRADLEY, GILBERT	RS1617S0084047	2x30 - I	RS - OT	Jul 2016 - 19, 21, 25, 26	\$50.00	4.00	30	\$200.00
DEVRIES, SHAYNA	RS1617S0083923	2x30 - I	RS - OT	Jul 2016 - 12, 13, 19, 21, 26, 28	\$50.00	6.00	30	\$300.00
HEIN, SHEENA	RS1617S0083946	3x30 - I	RS - OT	Jul 2016 - 12, 13, 15, 19, 21, 22, 26, 28	\$50.00	8.00	30	\$400.00
MCCORD, THERON	RS1617S0083270	1x30 - I	RS - OT	Jul 2016 - 6, 19, 26	\$50.00	3.00	30	\$150.00
NIETO, OWEN	RS1617S0083427	2x30 - I	RS - OT	Jul 2016 - 12, 13, 18, 19, 21	\$50.00	5.00	30	\$250.00
VICKERS, KIARA	RS1617S0083792	1x30 - I	RS - OT	Jul 2016 - 21, 26	\$50.00	2.00	30	\$100.00
WHITT, ROLLAND	RS1617S0083265	1x30 - I	RS - OT	Jul 2016 - 6, 22, 25	\$50.00	3.00	30	\$150.00
<b>Grand Total:</b>								<b>\$1,550.00</b>

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

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



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# Submit Voucher

- ▶ Navigate to the Submit voucher(s) screen under the Billing menu
- ▶ Select the County and Service type
- ▶ Select Vouchers you wish to submit and click "Submit Voucher(s)"
- ▶ Enter the Name and Title of the submitter
- ▶ Enter your Billing Provider PIN
- ▶ Click "I Agree" to agree and digitally sign the voucher and submit to the County

Submit voucher(s) for ERIE county (unbilled RS vouchers).

ERIE ▼ RS ▼

Select any Unbilled Vouchers

Select	Bill Date	Voucher #	Description	Authorized Claimant	Claimant Title	# Enrollments	Amount Billed
<input checked="" type="checkbox"/>	8/1/2016	RS160731064200	July 2016 Speech	Mary Jones	Director	29	\$7,075.00
<input checked="" type="checkbox"/>	8/1/2016	RS160731064211	July 2016 Physical Therapy	Mary Jones	Director	3	\$750.00
<input checked="" type="checkbox"/>	8/1/2016	RS160731064142	July 2016 Occupational Therapy	Mary Jones	Director	7	\$1,550.00

Select All **Total Billed:** \$9,375.00

Submit Voucher(s)

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.

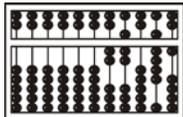
Provider Name: HIGHER LEARNING, LLC

Username: HIGHERLEARNINGLLC\_11

Name & Title: Mary Jones, President

Pin

I agree.

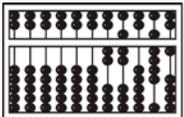


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# Recalc

- ▶ Any items that have been changed since the initial creation of the voucher are not reflected in the total. These changes include
  - ▶ Signed/re-signed
  - ▶ Matched to a County Enrollment
  - ▶ Attendance moved from one voucher to another.
- ▶ The Recalc process ...
  - ▶ Looks for any attendance that
    - ▶ Is associated with at County created enrollment (has an ESID/is matched)
    - ▶ Has been signed (has a signed date)
    - ▶ Has been co-signed or determined to not need a cosignature (has a co-signed date)
    - ▶ Is not on another voucher already
  - ▶ Groups those attendances by enrollment (ESID) and Service month and re-calculates an amount for that month for that enrollment.

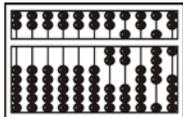


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# Why doesn't attendance appear to be added to a voucher

- ▶ The attendance has been added or modified (matched, signed/co-signed) since the voucher was created.
  - ▶ Use Recalc to have system look for ready attendances
- ▶ The attendance is on an unmatched enrollment (no ESID)
  - ▶ Match to County Created enrollment and use Recalc
- ▶ The attendance is missing a Signed Date or Cosigned Date
  - ▶ Have the therapist/supervisor sign or co-sign the attendance
- ▶ The attendance is on another Voucher
  - ▶ If the other voucher has not been submitted you can remove it from that voucher
  - ▶ If the County denied that attendance on that other voucher, submit request to [support@CPSEPortal.com](mailto:support@CPSEPortal.com) to rebill for that ESID and date of service

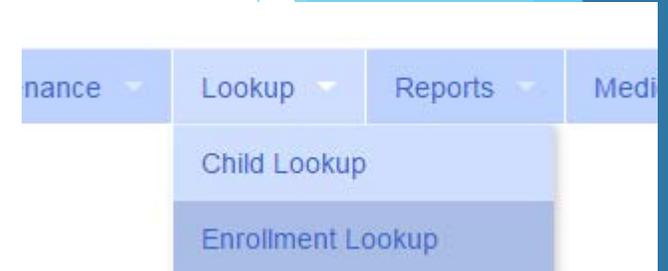


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# How to research Attendance not appearing to bill

- ▶ Navigate to Child Lookup screen under the Lookup menu
- ▶ Enter search criteria to find the child (use Advanced Search options if applicable)
- ▶ Click the Details link on the child you are researching



## Child Lookup

Last Name   [\[ Hide Advanced Search options \]](#)

School Year  County  Provider  District  STAC ID  Electronic Service ID

Last Name	First Name	DOB	SED STAC ID	District	County	Match Status	
ORTEGA	RENE	2/19/2012	G04240	Orchard Park	ERIE	County Record	<a href="#">Details</a>

# Researching attendance

- ▶ Locate the row for the enrollment on the Child Details screen. You may need to change the school year filter.
- ▶ Make sure the row has an ESID (is a County created enrollment)
  - ▶ If there is no ESID, it cannot be billed. You need to match this enrollment to a County created enrollment
- ▶ Next, click the Attendances link to view the attendances for that enrollment

## Child Details (ORTEGA, RENE)

DOB: 2/19/2012 Gender: M

Address:  
3094 62nd Street

County: ERIE  
District: Orchard Park  
Matched?: Y

, NY

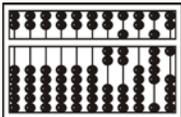
View Information for School Year: 2015 - 2016 ▼

<< Back to Search Results

### Enrollments

Strikethrough = The county deleted this enrollment

Status	School Year	From	To	ESID	Provider	Enrollment	Service	Frequency	Individual Or Group	
	2015 - 2016 Winter	2/2/2016	6/30/2016	RS1516W0082830	HIGHER LEARNING, LLC	RS	ST	3x30	I	Attendances
	2015 - 2016 Winter	9/1/2015	2/1/2016	RS1516W0079642	HIGHER LEARNING, LLC	RS	ST	2x30	I	Attendances



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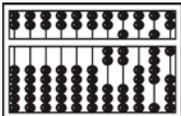
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# Researching attendance

- ▶ Make sure the attendance exists in the list.
  - ▶ If it does not appear, then it is not in the system, or it is entered under a different child or different enrollment
- ▶ Make sure there is a date in the Signed Date column
  - ▶ If it is empty, have the therapist sign it
- ▶ Make sure there is a date in the Co-Signed Date column (even if no co-signature is required for that therapist)
  - ▶ If the therapist requires a co-signature, have the supervisor co-sign
  - ▶ If the therapist does not require a co-signature, have the therapist make sure that their profile only lists their licensed credential (SLP and not TSHH). Have the therapist un-sign and resign.
- ▶ Make sure the Voucher # is empty.
  - ▶ If it is on another voucher that has not been submitted to the County you can edit that other vouchers details and remove it. If the voucher has been submitted to the County and the County denied it and you would like to rebill it, follow the rebilling process.

**Attendance List**  
**Child Name:** ORTEGA, RENE    **County:** ERIE    **Provider:** HIGHER LEARNING, LLC    **District:** Orchard Park  
**ESID:** RS1617S0083890    **From/To:** 7/1/2016-8/31/2016    **Service:** RS-ST (IND)    **Frequency:** 2x30

Service Date	Make Up	Time In	Time Out	Duration	# Sess	Mins/Session	Service Provider	Setting	Ind/Grp	Signed Date	Co-Signed Date	Voucher #
07/12/16		11:00 AM	11:30 AM	30	1.00	30	CECILA CUELLAR	Home	I	07/12/16	07/12/16	RS160731064200
07/14/16		11:00 AM	11:30 AM	30	1.00	30	CECILA CUELLAR	Home	I			
07/26/16		11:15 AM	11:45 AM	30	1.00	30	CECILA CUELLAR	Home	I			

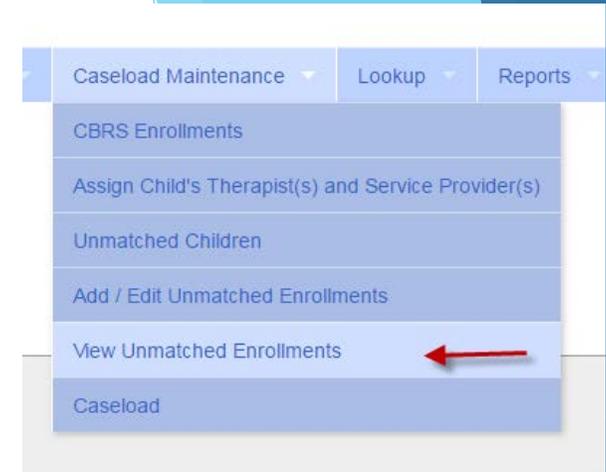


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# View Unmatched enrollments

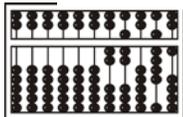
- ▶ Navigate to View Unmatched Enrollments under Caseload Maintenance



## Unmatched Enrollments

Retrieve

County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description				
ERIE	CHASE	VIKKI	05/13/11	201617	07/01/16	08/31/16	RS	ST	2x30	Attendances			Delete
ERIE	COPE	ROGELIO	10/28/11	201617	07/11/16	08/19/16	RS	ST	2x30	Attendances			Delete
ERIE	DAIGLE	RONI	04/01/11	201617	07/01/16	08/31/16	RS	ST	3x30	Attendances	Attempt Child Match		Delete
ERIE	ESTEP	RONDA	11/23/11	201617	07/01/16	08/19/16	RS	OT	2x30	Attendances	Attempt Child Match		Delete
ERIE	FINCH	ARLEEN	09/28/12	201617	07/01/16	08/31/16	RS	ST	5x30	Attendances			Delete
ERIE	GARY	KELLY	01/30/11	201516	04/20/16	06/30/16	RS	OT	1x30	Attendances			Delete
ERIE	GERBER	MEGAN	02/17/12	201516	03/30/16	06/30/16	RS	ST	3x30	Attendances	Attempt Enrollment Match		Delete
ERIE	HOANG	JULES	03/24/11	201516	04/07/16	06/30/16	RS	ST	2x30	Attendances	Attempt Enrollment Match		Delete
ERIE	PRYOR	GLEN	10/08/12	201617	07/01/16	08/31/16	RS	PNT	1x60	Attendances			Delete
ERIE	RHODES	MOHAMMED	10/03/11	201617	07/01/16	08/31/16	RS	PT	1x30	Attendances			Delete
ERIE	SARGENT	HECTOR	10/08/12	201617	07/01/16	08/31/16	RS	PNT	1x60	Attendances			Delete
ERIE	TALLEY	ANTONIO	04/04/12	201617	07/01/16	08/31/16	RS	MUS	1x30	Attendances			Delete
ERIE	TALLEY	ANTONIO	04/04/12	201617	07/01/16	08/31/16	RS	ST	3x30	Attendances			Delete
ERIE	TALLEY	ANTONIO	04/04/12	201617	07/01/16	08/31/16	RS	ST	4x30	Attendances			Delete

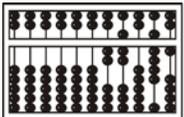


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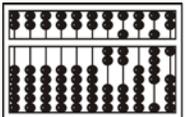
# Attempt Matching

- ▶ Row says “Attempt Child Match”
  - ▶ The enrollment is associated with a child record that was created by the provider, not the County
  - ▶ You need to match the child record to a County created child before the enrollment can be matched
- ▶ Row says “Attempt Enrollment Match”
  - ▶ The enrollment is associated with a County created child record, and that County created child has County created enrollments that may match
- ▶ Row says neither “Attempt Child Match” nor “Attempt Enrollment Match”
  - ▶ The enrollment is associated with a County created child record, however that County created child does not have any County created enrollments that may match



# Matching Enrollments

- ▶ Attendance associated with unmatched enrollments cannot be billed to the County
- ▶ Use the View Unmatched Enrollments screen to try to match enrollments
- ▶ If the row says “Attempt Child Match”, you must first match the child to a County created child
- ▶ If the row says “Attempt Enrollment Match, you can try to match to a County created enrollment.



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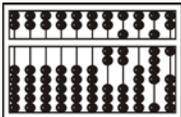
# Matching Children

- ▶ Items cannot be submitted to the County on “Unmatched” children/enrollments. They can only be submitted for County created enrollments
- ▶ In order to address this, you need to “Match” the temporary/placeholder entry to a County created one and then the data will be merged into the County created entry
- ▶ Click Attempt Child Match from View Unmatched Enrollments

## Unmatched Enrollments

Retrieve

County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description			
ERIE	BLUM	MERIL	03/24/12	201516	04/06/16	06/30/16	RS	PT	1x30	Attendances	Attempt Child Match	Delete



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# Matching Children

## Match Child Against County-Imported Child

### Current Unmatched Child:

**BLUM, MERIL** County: **ERIE** District: **Frontier** DOB: **3/24/2012**

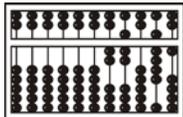
### Potential Matches:

DOB To Match

Showing children matching the DOB, and with the same first  letters ("BLU") in their last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	BLUM	MERYL		3/24/2012	ERIE	Frontier	2250 STATE RTE 32		NY		

- ▶ The top of the screen will show the information you entered for the child
- ▶ The bottom shows the potential matches
- ▶ You can alter potential match search criteria for DOB and First ? letters of their last name
- ▶ Make sure the child you are selecting to match is the correct one and click select



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# Confirming your Child Match

- ▶ Click Select to choose the Count created child that matches your agency entered child.
- ▶ The bottom of the screen will ask you to confirm the information.
- ▶ Double check the information for accuracy and if it is correct, click Match

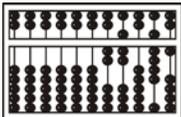
Showing children matching the DOB, and with the same first 3 letters ("BLU") in their last name.

	Last Name	First Name	MI	DOB	County	District	Address1	City	State	Zip	Home Phone
Select	BLUM	MERYL		3/24/2012	ERIE	Frontier	2250 STATE RTE 32		NY		

**WARNING:** By clicking the button below, you are combining these two children (including any associated data - not limited to: enrollments, attendances, medicaid consents, medicaid eligibility, IEPs, log notes, scripts/orders). Make sure the match is correct. This cannot be undone.

BLUM, MERIL (3/24/2012) → BLUM, MERYL (3/24/2012)

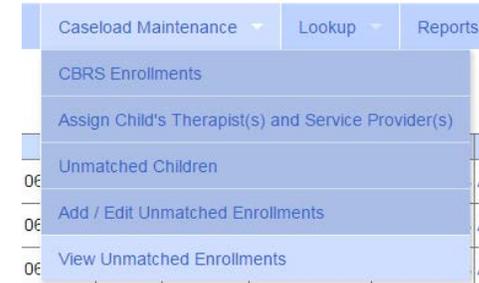
Match!



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# Matching Enrollments



- ▶ Navigate top menu to Caseload Maintenance -> View Unmatched Enrollments

## Unmatched Enrollments

Retrieve

County	Last Name	First Name	DOB	School Year	From	To	Type	Service	Description				
ERIE	BLUM	MERIL	03/24/12	201516	04/06/16	06/30/16	RS	PT	1x30	Attendances	Attempt Child Match		Delete
ERIE	GARY	KELLY	01/30/11	201516	04/20/16	06/30/16	RS	OT	1x30	Attendances			Delete
ERIE	GERBER	MEGAN	02/17/12	201516	03/30/16	06/30/16	RS	ST	3x30	Attendances		Attempt Enrollment Match	Delete
ERIE	HOANG	JULES	03/24/11	201516	04/07/16	06/30/16	RS	ST	2x30	Attendances		Attempt Enrollment Match	Delete
ERIE	LACKEY	ISIAH	06/27/12	201516	03/30/16	06/30/16	RS	ST	3x30	Attendances		Attempt Enrollment Match	Delete

- ▶ If the child is an Unmatched child (agency created) you can Attempt Child Match
- ▶ If the enrollment has potential matches (same child and service type), the "Attempt Enrollment Match" link appears

# Matching Enrollments to County Created entries

## Match Enrollment Against County-Imported Enrollment

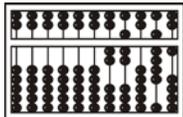
Child:  
**SHELDON, NEAL** County: **ERIE** District: **Orchard Park** DOB: **7/22/2011**

**Current Unmatched Enrollment:**  
Session: **2015 - 2016 Winter** From Date: **3/30/2016** To Date: **6/24/2016**  
Enrollment Type: **RS** Service Type: **ST** Individual or Group: **I** Frequency: **1x30**

### Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2015 - 2016 Winter	9/1/2015	6/30/2016	I	2x30	RS1516W0081795

- ▶ The top of the screen shows the agency created enrollment information
- ▶ The bottom shows a list of potential matches based on service type only (doesn't check dates)
- ▶ **If** you can find a County created match, click Select



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# Confirm Enrollment Match

- ▶ When you select an enrollment to Match, you will be prompted to confirm the information.
- ▶ Double check the information is correct.
- ▶ If it is correct, click Match

## Potential Matches:

	Enrollment Type	Service Type	Session	From Date	To Date	I or G	Frequency	ESID
Select	RS	ST	2015 - 2016 Winter	9/1/2015	6/30/2016	I	2x30	RS1516W0081795

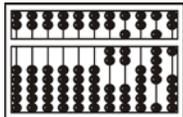
**WARNING:** By clicking the button below, you are combining these two enrollments (including any associated data - not limited to: attendances, orders/scripts, log notes, therapist/provider assignments). Make sure the match is correct. This cannot be undone.

UNMATCHED ENROLLMENT  
(3/30/2016 - 6/24/2016)  
1x30



RS1516W0081795  
(9/1/2015 - 6/30/2016)  
2x30

Match!

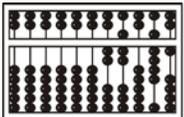


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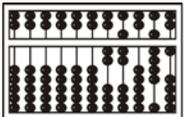
# Rebilling

- ▶ If you submit attendance to the County and the County denies it, and now you would like to bill it again, here is the process
  - ▶ Remove the attendance from the original voucher. This is done by submitting a request to [support@CPSEPortal.com](mailto:support@CPSEPortal.com). We need the County, ESID and dates of service that need to be removed. See <http://support.cpseportal.com/kb/a81/removing-attendance-from-submitted-voucher-order-to.aspx>
  - ▶ Correct the attendance (if necessary)
    - ▶ Move to correct ESID or;
    - ▶ Unsign, modify the attendance and re-sign
  - ▶ Add it to a new voucher
  - ▶ Submit voucher



# Removing attendance from the voucher

- ▶ Using the process here, <http://support.cpseportal.com/kb/a81/removing-attendance-from-submitted-voucher-order-to.aspx> , notify [support@CPSEPortal.com](mailto:support@CPSEPortal.com) that you wish to have attendance removed from a voucher
- ▶ We will remove it and notify you when that is complete
- ▶ We only take it off the original voucher so that you can fix it.
  - ▶ We don't delete it from the system
  - ▶ We don't un-sign it
  - ▶ We don't correct it

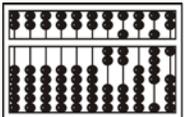


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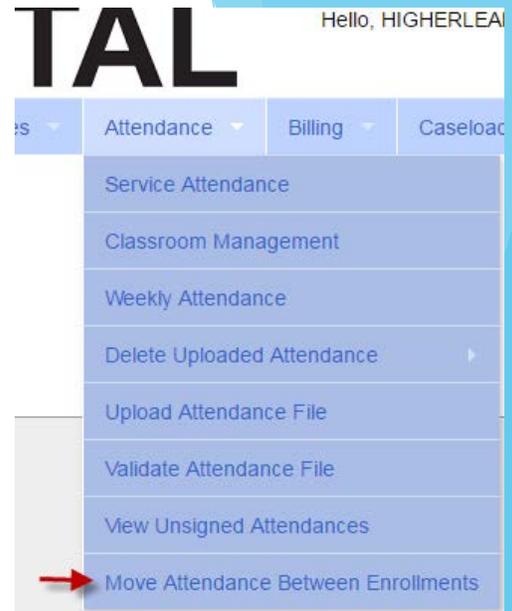
# Attendance on incorrect ESID

- ▶ Sometimes the County will deny the entry because attendance is on the wrong ESID for a child. This could be because
  - ▶ The County rescinded the enrollment and you submitted under the rescinded ESID.
  - ▶ The dates of service for the enrollment changed (ex. child moved districts) after the attendance was entered
- ▶ To resolve this, use the Move Attendance between enrollments



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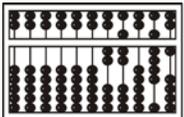


# Moving Attendance

- ▶ Navigate to the Move Attendance Between Enrollments under the attendance menu
- ▶ Put in search criteria to find the child/enrollment that is currently associated with the attendance
- ▶ Hint... running this report with no name and Problems Only will show items that are problems that you may not be aware of

2015 - 2016 Winter ▼ RIVERSIDE EARLY INTERVENTION ▼ Last Name   Problems Only  Show All

School Year	County	District	Provider	ESID	Last Name	First Name	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group	
2015 - 2016 Winter	NASSAU	ELMONT UFSD	RIVERSIDE EARLY INTERVENTION	RS1516W0131351	GIBBS	OTIS	RS	9/2/2015	12/31/2015	COR	1x30 MONTHLY	I	Select
2015 - 2016 Winter	NASSAU	MASSAPEQUA UFSD	RIVERSIDE EARLY INTERVENTION	RS1516W0133275	BERMAN	VINCENZA	RS	2/22/2016	6/30/2016	OT	2x30	I	Select
2015 - 2016 Winter	NASSAU	MERRICK UFSD	RIVERSIDE EARLY INTERVENTION	RS1516W0131185	PORTER	RANEE	RS	9/1/2015	11/30/2015	ST	3x30	I	Select
2015 - 2016 Winter	NASSAU	NORTH BELLMORE UFSD	RIVERSIDE EARLY INTERVENTION	RS1516W0132389	MORGAN	ALEXANDRA	RS	11/30/2015	6/8/2016	ST	2x30	I	Select
2015 - 2016 Winter	NASSAU	NORTH BELLMORE UFSD	RIVERSIDE EARLY INTERVENTION	RS1516W0133010	SIMMONS	CRYSTAL	RS	1/19/2016	6/12/2016	ST	2x30	I	Select



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# Moving Attendance

1. Select the enrollment that is currently associated with the attendance
2. Select the attendances that you would like to move
3. Select the new destination enrollment that you would like the attendances to be associated with
4. Click Move to move the attendances

2015 - 2016 Winter	NASSAU	NORTH BELLMORE UFSD	RIVERSIDE EARLY INTERVENTION	RS1516W0132389	MORGAN	ALEXANDRA	RS	11/30/2015	6/8/2016	ST	2x30	I	Select
2015 - 2016 Winter	NASSAU	NORTH BELLMORE UFSD	RIVERSIDE EARLY INTERVENTION	RS1516W0133010	SIMMONS	CRYSTAL	RS	1/19/2016	6/12/2016	ST	2x30	I	1 Select

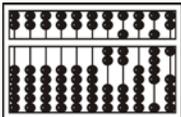
## Selected Enrollment Info

Service Date	Service Provider	Individual Or Group	County	District	ESID	Enrollment Type	From Date	To Date	RS Type	Frequency	Individual Or Group
6/1/2016	WAYNE DIAZ	I	Select	NASSAU	NORTH BELLMORE UFSD	RS	6/13/2016	6/24/2016	ST	2x30	I
6/6/2016	WAYNE DIAZ	I									
6/7/2016	WAYNE DIAZ	I									
6/8/2016	WAYNE DIAZ	I									
<input checked="" type="checkbox"/> 6/13/2016	WAYNE DIAZ	I									

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# Rescinded Enrollments

- ▶ Navigate to the County Rescinded Enrollments page under Caseload Maintenance menu
- ▶ List will show all Enrollments rescinded by the County
- ▶ Nightly processing removes rescinded enrollments that do not have any attendance
- ▶ Any attendance submitted on a rescinded enrollment will not be paid by County
- ▶ Use County Rescinded Enrollment screen to find rescinded enrollments and move attendance



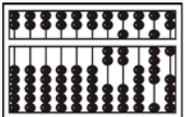
Provider:

Child Name	ESID	From Date	To Date	County	District	RS Type	I / G	Frequency		
Doe, Jane	RS1415W0122445	9/3/2014	6/25/2015	NASSAU	HICKSVILLE UFSD	OT	I	2.00 x 30 WEEKLY	Move Attendance	Delete
Doe, Jane	RS1415W0122446	9/3/2014	6/25/2015	NASSAU	HICKSVILLE UFSD	ST	I	2.00 x 30 WEEKLY	Move Attendance	Delete
Doe, Jon	RS1415W0123489	9/3/2014	6/25/2015	NASSAU	GREAT NECK UFSD	ST	I	2.00 x 30 WEEKLY	Move Attendance	Delete
Doe, Jon	RS1415W0121224	9/2/2014	6/26/2015	NASSAU	WESTBURY UFSD	ST	I	3.00 x 30 WEEKLY	Move Attendance	Delete
Evans, Mary	RS1516W0132249	11/30/2015	6/24/2016	NASSAU	OCEANSIDE UFSD	ST	I	3.00 x 30 WEEKLY	Move Attendance	Delete
Jones, Mike	RS1516W0131757	10/29/2015	6/24/2016	NASSAU	MINEOLA UFSD	ST	G	1.00 x 60 WEEKLY	Move Attendance	Delete
Martin, Sara	RS1415W0123294	9/3/2014	6/26/2015	NASSAU	MALVERNE UFSD	CSL	I	1.00 x 60 MONTHLY	Move Attendance	Delete
Porter, Karen	RS1516W0129780	9/2/2015	6/24/2016	NASSAU	PORT WASHINGTON UFSD	OT	I	2.00 x 30 WEEKLY	Move Attendance	Delete
Porter, Karen	RS1516W0129779	9/2/2015	6/24/2016	NASSAU	PORT WASHINGTON UFSD	PT	I	2.00 x 30 WEEKLY	Move Attendance	Delete
Sullivan, Jennifer	RS1516W0131702	9/28/2015	6/23/2016	NASSAU	VALLEY STREAM 30 UFSD	ST	I	3.00 x 30 WEEKLY	Move Attendance	Delete

1 2

# Best practices

- ▶ Be proactive, fix potential problems before they get to the County on a voucher
- ▶ On a regular basis try to match children and enrollments
- ▶ On a regular basis move attendances that are on the wrong enrollment (outside of date range or rescinded)
- ▶ Before submitting the voucher, check again for attendance outside of date range

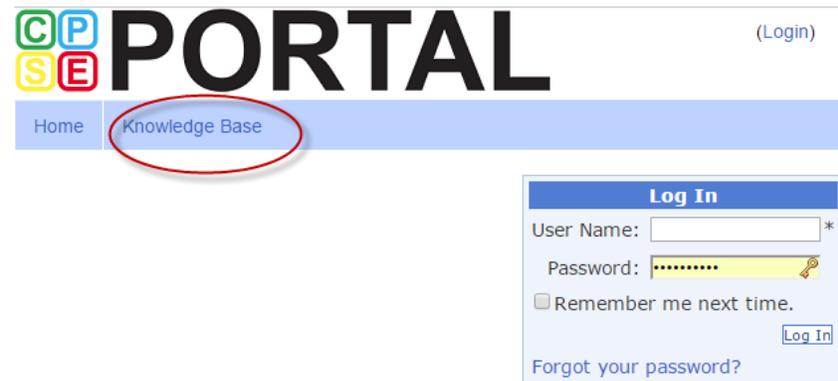


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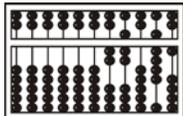
**C** **P** **S** **E** **PORTAL**

# Additional Information

- ▶ Email [support@CPSEPortal.com](mailto:support@CPSEPortal.com)
- ▶ CPSE Portal support site <http://support.cpseportal.com>
  - ▶ Knowledge Base Articles
- ▶ Knowledge Base Menu from [www.CPSEPortal.com](http://www.CPSEPortal.com)



The screenshot shows the CPSE Portal website interface. At the top left is the logo consisting of the letters 'C', 'P', 'S', and 'E' in colored boxes (green, blue, yellow, red) next to the word 'PORTAL' in large black letters. To the right of the logo is a '(Login)' link. Below the logo is a navigation bar with two items: 'Home' and 'Knowledge Base'. The 'Knowledge Base' item is highlighted with a red oval. To the right of the navigation bar is a 'Log In' form. The form has a blue header with the text 'Log In'. It contains a 'User Name:' field with an asterisk, a 'Password:' field with a key icon, a checkbox for 'Remember me next time.', and a 'Log In' button. Below the form is a link for 'Forgot your password?'.



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