PORTAL

NIAGARA COUNTY QUICK REFERENCE GUIDE

CPSE Portal Website: **www.cpseportal.com**

CPSE Portal Knowledge Base: **http://support.cpseportal.com/kb/root.aspx**

Portal Support: **Support@cpseportal.com**

Please note: This quick reference guide has been developed to assist you in navigating the CPSE Portal, as with any new processes, and as providers move through the CPSE Portal Process, this guide will be updated as needed based on identified concerns. Updates to the guide will be provided to you via e-mail notification with the most current version housed on the NCDOH-CWSN website under the "For Providers" link.

Updated October 2018

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1. Provider Information/License Attestation Process

Upon initial log in to CPSE Portal, licensed therapists (OT/COTA, PT/PTA, ST) will need to complete License Attestation. This process will also be required any time any information changes, name, license update, etc.
For information/instructions on Attestation check this Knowledge Base article:
http://support.cpseportal.com/kb/a150/credential-verification-providers.aspx

Once the provider completes their attestation process, each licensed provider must be approved by the County (if a provider attestation is not county approved you will not be able to sign attendance or bill services from that provider). Before Niagara County will approve any attestations we must have on file:

- ✓ a copy of the actual provider license (initially and any renewals)
- ✓ Applicable Supervision Plans
- ✓ *New Providers*: Staff Exclusion List check (county completes for RSO contractors, 4410's are required to complete their own checks.
- ✓ *New Providers*: County will enter all providers through the Medicaid Exclusion lists and will require agency/provider assistance with resolving any potential matches.

2. Your Caseload

Rendering Providers must be assigned to children and enrollments in order to enter daily session information. To review assigning providers check this Knowledge Base Article:
http://support.cpseportal.com/kb/a34/assign-children-to-therapist.aspx

To view you cases go to Caseload Maintenance – Caseload (bottom of list). To see your current caseload, choose your school year (ex. 2018-2019 Winter). Make sure your enrollments are correct. The enrollment frequency and duration must match exactly to the IEP.

Check:
Service type; Individual or Group;
Frequency and Duration: for all services this must match exactly
        All enrollments are entered as 30 minutes. If the IEP says 1x60, the Portal will say 2x30.

3. Electronic Signature

Go to **My Account – My Profile – Personal and Professional –** In the box that says: Signature, Title, and Credentials – make sure you have your name and professional credentials (ex. Mary Jones, MA, CCC-SLP)
Go to **My Account** – **My PIN** – this where you will choose a PIN. This is what you will use to electronically sign your attendance (log notes).

4. Signature Sheets/Session Verification Logs

Confirmation of Service Delivery/Session Verification Forms – **Print from Portal**
Go to Caseload Maintenance – Caseload
> At the bottom of the list of your enrollments is a button that says: **Generate Blank Signature Logs for Selected Enrollments**

Click the box to the left of the enrollments to print Signature Logs. You must use these forms for SEIS and RSO-not required for CBRS.

You must have a signature for each session.

Just fill in the date of the session, the start and end time, the code and have parent sign.

Your Signature is required on the bottom of the form – Sign and date at the **end** of the month.

Requirements for CPSE Service Types

	Related Service (RS/RSO)	Coordination	SEIS	Center Based Program (CB)	Center Based Related Services (CBRS)
Session Verification Log	X	Indicate on RS log	X		
Session Notes	X	X	X		X
Attendance				X	X
Script	OT/PT/ST				X

5. Defaults

Even if you have only child, we recommend you set your DEFAULTS. This will save a lot of time for every session you enter.

Go to Caseload Maintenance – **Caseload**, click on "Defaults" all the way in the last column on the right. In there you can choose default settings for each service enrollment:

Ensure you have the correct provider name and school year selected, then click Retrieve.

Bill each entry as [1] 30 minute session(s) for a total duration of 30 minutes
* All Related Services - The Default number of sessions will always be one, as you can only provide one session per day.

Bill each entry as [2] 30 minute session(s) for a total duration of 60 minutes

Service Setting – Choose the service setting for this enrollment (ex. Preschool, Community Setting, Home)

Location – Type in the location. For more information about specificity requirements for Medicaid see NYSED Medicaid in Education Q & A #'s 105 and 164
(http://www.oms.nysed.gov/medicaid/q_and_a/).

Default CPT Code – choose the CPT code(s) you will use most often.

Default ICD10 Code – choose the appropriate ICD10 for that student.

Non-Medicaid billable services (Parent Training, Vision, TVI, Coordination) do not need an ICD10 or CPT Code. Set your DEFAULTS as NOICD and NOCPT.

6. Favorites

Go to **My Account – My Profile – My Favorites**

Favorite ICD10 Codes (most commonly used codes). If you set your DEFAULTS, you will not need to create Favorite ICD10 Codes. **But you should make one of your favorite ICD10 codes – "NOICD".**

Favorite CPT Codes (most commonly used codes). Since each discipline only uses a few CPT Codes frequently, I still think it is a good idea to put a few Favorite CPT Codes into your favorites. **Definitely make one of your favorite CPT Codes – NOCPT.**

7. SEIS Billing
Due to differences in SED reimbursement and SED service provision guidelines for SEIS services, payment is based on 30 minute increments of service. SEIS Services must be provided in 1 hour increments per the child's IEP. In order to ensure correct payment for services you must bill your SEIS as 2x30 minute sessions.

This can be accomplished 2 ways:

Option 1-Change the box indicating units with in session to 2 for each attendance date entered.

Option 2-Change the default setting **PER EACH CHILD*** with SEIS to indicate *"Bill each entry as 2.00 – 30 minute sessions for a total of 60.00 minutes"* (*Remember Defaults are per child-this must be done for every enrollment)

Enrollment Defaults

Enrollment Info

Child Name:	Electronic Service ID:
County: NIAGARA	Provider: COUNTY OF NIAGARA District:
Service Nickname:	

Enrollment Type: SEIT   RS Type:

Enrollment Notes:

For each new attendance use these default values

Bill each entry as [2.00] 30 minute session(s) for a total duration of 60.00 minutes.

Service Setting: Preschool   Location: UPK-Ohio St. School, NT

Default CPT Code for new attendance

	CPT Code	Description	Units	
Edit	NOCPT	No CPT Code for this service	1	Delete
				Add

Default ICD10 Code for new attendance

	ICD 10 Code	Description	
Edit	NOICD	No diagnosis	Delete
Edit	NOICD	No diagnosis	Delete
			Add

If you are creating a voucher for SEIS and notice your payment amount is lower than expected then you did not complete one of the 2 options listed you will not be paid at the full 1 hour rate. Your rendering provider will need to un-sign their attendance and make the correction, resign and then the correct amount will be billed on your voucher. PLEASE MAKE CORRECTIONS BEFORE SUBMITTING VOUCHER TO COUNTY.

8. Entering Sessions

ENTERING YOUR SESSIONS:
Go to **Attendance - Weekly Attendance→Click on the box (Date and Time)** where your session belongs - This will bring you to the screen where you will enter in all the information for your session.

Calendar Boxes – Each box is 15 minutes. If you click in the box of the start time of the session (ex. 9:00AM) the time will automatically prefill as 9:00AM to 9:30 AM. If you click on the box for 9:00 AM and hold the mouse down and drag it over 3 boxes it will automatically fill in 9:00 AM to 9:45 AM, etc. Please Note: the system is very sensitive, if you move the mouse within the one box, it will only calculate 15 minutes. (9:00 AM – 9:15 AM).

Time – it should prefill in the times for a 30 minute session, starting with the time you choose (please double check). You can manually adjust the times if needed.   NOTE: *If you accidentally enter times that overlap, the system will not warn you. However, when you look at the Calendar you will see two boxes side by side. That means something is wrong with the times. You should only see one box (with the child's name – or children's names if Group session). You will not be able to sign attendances which are overlapping unless a group services was provided.*

If you have set your DEFAULTS set per child, you will not need to enter all info each time, the items marked with * below will fill based on your "Default Entries" – Number of sessions, Setting, Location, ICD10, CPT codes. If you have not set your Defaults, you will need to manually enter these.

Child – choose Child from drop down
Number of Sessions*- ☐ x 30 (45 or 60) minute sessions (should be 1 in most cases)

Setting* – choose from list based on where services are being provided (if setting does not match what is authorized in the IEP it is the PROVIDERS responsibility to contact School District for an amendment:

- **Home:** IEP says Home
- **Facility Location/Private Office:** IEP says Office – Provider Office/Facility Location
- **Preschool:** IEP says Preschool, Nursery school, Daycare, UPK, Classroom, Therapy Room (at Preschool), etc.
- **Community:** Local Library (usually an "Other" on IEP's)
- **Daycare:** any daycare location or setting

Location* – Type in the location. For more information about specificity requirements for Medicaid see NYSED Medicaid in Education Q & A #'s 105 and 164 (http://www.oms.nysed.gov/medicaid/q_and_a/).

Diagnosis Code* –If you have your favorites entered, just click on the "heart" to choose from your list of favorites. If not, enter the ICD10 code and choose from list. Every session must have an ICD10 code.

CPT Codes* – click on "heart" to choose from favorites, or enter code and choose from list. OT/PT (Individual) must have one code for every 15 minutes (if the same code is used more than once, change the number of "Units". If it is not a Medicaid billable session (ex. Coordination) and there is no CPT code, enter "NOCPT".

For Niagara County Services: <u>DO NOT check the box for Make-up visit or Does Not Meet Medicaid Requirements</u>

Progress – These boxes are optional for providers to use if they choose.

Session Notes – Type in your note.

Click "Save" – Make sure it is filled in completely and accurately. You can edit the entries any time prior to the electronic signature being added.

Overlapping Times:
The Portal will allow you to enter overlapping times **without any warnings or red flags**. While entering your sessions, look at your weekly Calendar.   Make sure everything looks good. If you have any overlapping times, 2 session bubbles will appear side by side within the same time box.   You should never see 2 bubbles within the same time box.   Even group sessions are only one bubble inside the 1-time box (it just has the multiple children's names listed in the1 bubble). Check each week you are submitting billing for before going on to sign your attendance.

9. **Coordination Activities**

If you are the Coordinator of Services, enter it exactly as you would a session under the Weekly Attendance (**Enrollment Service Type is COR –**this is separate from your service enrollment). You must include times. Pick one day near the end of the month and enter in one 30 minute session that does not overlap with another session. It is understood that coordination takes place over the course of the entire month, but you can only bill for 30 minutes. Use the NOCPT code (all caps, no space). Please include a line on your session verification log for the service date and indicate "coordination" in the signature area.

10. **Groups**

To enter a group session into Portal, click on the date and time to enter the group session. Click on add the first child in the group and fill in all information, click save. Then click on [Child 2] (on the left), enter the information for that child's session and click "save". Repeat for all children in the group.

If you provide group services for only 1 child (G1) use the NOCPT code option in the CPT blank.

11. **Classroom attendance**

To view instructions for recording classroom attendance view this Knowledge Base article.
http://support.cpseportal.com/kb/a5/classroom-attendance-instructions.aspx

12. **Absences**

Do not enter any absences on the Attendance Calendar. Absences may be recorded in the Portal under **Activities-Activities Management**. Go to **Activities-Activities Management** choose: Add Activity, then choose either Child Absent or Provider Absent. Do not enter Times.

Providers should offer and complete make-ups per Niagara County Policy, please do not check the box to indicate the session as a makeup in CPSE portal.

13. **Adding Children and Enrollments**

> To Add a Child
> - Under "Caseload Maintenance" tab →Select "Unmatched Children"→ click the "Add Child" button
> - Enter all known child information, name, school district, DOB, address **DO NOT NEED TO ENTER ANYTHING IN THE SEDSTACID space**
>
> To Add enrollments for the child (RS/CB/SEIS)

- From the "Unmatched Children" list select "Enrollments" for the child (to the right blue type)
- Enter in the Session, Session Dates from and to, Enrollment type, RS Type, select "I" or "G", "units" and "minutes" and "timespan" in order to add the enrollment, then select "Add" button

Assign to Therapist
- Under "Caseload Maintenance" tab → select "Assign Child's Therapist(s) and Service Providers"→type in child name or hit "Search" for list of children. *Advanced Search Options allows you to search buy school year, county, etc.
- Select the child then the correct enrollment. To select the provider, click the box next to the provider name then select the "Add Therapist/Service Provider button.

For more information look at this Knowledge Base Article.
http://support.cpseportal.com/kb/a71/entering-unmatched-children-and-unmatched-enrollments.aspx

14. Reviewing and Signing Attendance-Related Services

Go to Attendance
    Digital Signature
        Sign Attendance
Choose "From Date and To Date": (if signing daily select that day in the range, or set week if signing weekly* Niagara County requires notes to be signed AT LEAST on a weekly basis)
Enrollment: Leave as "Not Selected" so all your enrollments will appear (or you can choose specific enrollments by Child)
County: Select Niagara
Provider: Select the Provider you are currently signing for (if you work for more than one provider)
Click: Retrieve

Click on Last Name to sort your attendance by the Child's Name. Your attendance will now appear by child (in alphabetical order) and date of service. You will see everything that you entered into every session. Review this against your Parent Signature form to make sure that you have every signature you need and that you did not enter any absences as sessions, etc.

If you are missing anything (Date, Time, ICD10, CPT Code, Note, etc.) you will see a yellow box. You will not be able to sign for any sessions where anything is missing. If you see a yellow box, or anything that requires a correction, click on the "Edit" button at the end of the row. This will bring you back to the session. Make any additions or corrections and hit Save. You will be brought back to the signature page (although you will need to resort it by Last Name, as it will revert back to date order.).

Once you are sure everything is correct, click on the box on the top row to the left of Last Name, this will check every box.

Click "Sign Attendance" (top, right, next to Retrieve)
A dialogue box will open. Enter Your Pin: number and click "I agree".

15. Reviewing and Signing Attendance-Classroom Attendance

Go to Attendance
     Digital Signature
          Sign Attendance
Choose "From Date and To Date": (if signing daily select that day in the range, or set week if signing weekly* Niagara County requires notes to be signed AT LEAST on a weekly basis)
Enrollment: Leave as "Not Selected" so all your enrollments will appear (or you can choose specific enrollments by Child)
County: Select Niagara
Provider: Select the Provider you are currently signing for (if you work for more than one provider)
Click: Retrieve

Click "Sign Attendance" (top, right, next to Retrieve)
A dialogue box will open. Enter Your Pin: number and click "I agree".

16. Reviewing and Signing Attendance-Co-Signatures

Co-signatures are required for COTAs, PTAs, CFYs LMSW's, and for 4410 program TSHHs and TSLDs. If your billing requires a Supervisor's signature, your Supervisor has access to your sessions in the Portal.

Anyone who is a supervisor must be assigned with a role of Supervisor in the Portal. To sign attendance as a supervisor go to the Attendance tab → Digital Signature→ Co-Sign attendance.
From there the supervisor will select the children they are working with and proceed to sign with their PIN number. **Remember supervisors must sign case notes within 45 days of the date of service.**

17. Treatment Log Notes–the Portal calls it "Printing" but it really is "Downloading"

You DO NOT have to Print your Log Notes to Submit with your billing but providers may want to make sure they have a copy of notes for their own records.

     Go to Reports - Child Treatment Log
Select Provider Name and rendering provider.
Service Dates: Click Choose Date Range:
From Date: (always choose the 1st day of the Month you are submitting billing for)
To Date: (always choose the last day (30th or 31st) of the Month you are submitting billing for)
County:
Children: All – or you can print each child separately.
Click Print Report.

Print Report brings up a PDF file of your Treatment Log Notes. Make sure that none of them say "Signed: NOT SIGNED". If any do, go back and sign it before saving or printing your log notes.

17. Corrections – Un-sign Attendance (please contact Niagara County before you do this for the first time)

Once you have signed your attendance, you cannot make any changes to your sessions. You must unsign the session you need to correct or delete. In the Portal go to Attendance – Digital Signature – Unsign Attendance. Choose the From Date and To Date to cover the session you wish to delete. **Enrollment –** leave as **Not Selected.** Make sure you have the correct County and Provider then click Retrieve. Click on the session you want to unsign. You must write a reason for unsigning the attendance (ex. typographical error, data error, missing information). Once you have unsigned the session, you can then edit the session, make any corrections or delete the session. Once the correction has been made, you must **resign** the session.

18. Vouchers

Providers must submit vouchers to Niagara County monthly, before submitting voucher check any "unmatched" children and enrollments to see if the County record is available yet. If the county record is available, you must match the enrollments and move the session notes from the unmatched record to the county record, see the Knowledge Base Article:
http://support.cpseportal.com/kb/a53/move-attendance-between-enrollments.aspx

Creating Voucher
Click on Billing Tab→ Voucher Management→Create Voucher

Select the County, Enrolment type and school year you are creating voucher for.

*Remember if you are a CB provider you will need to create a CB voucher (this is how you will be paid), and a CBRS Voucher (this gets your session information to the county). Niagara County will not download and pay provider CB vouchers without the corresponding CBRS voucher-do not submit one without the other.

The blanks for Vendor Invoice, claimant info, etc. can be filled out as each agency or provider chooses. These field are not required.

Once you have all the data you want included on the invoice click either save and edit or save and return.

Save and edit brings you to the page to add actual billing and enrollments to you invoice. Add the services you want to bill, by clicking the small box to the left of the name and assigning claims onto you bill. Once you are finished hit save button.
*Best practice would be to click the button indicating Items Not Ready to Bill before you submit your vouchers so that you can correct any errors on these claims and bill on current invoice.

Submit Voucher

Click on Billing Tab→ Submit Voucher
All vouchers that can be submitted will be in the list, if there are problems with claims on the voucher, there will be Problems on Voucher in red on the right side of the list. Before you can submit you need to correct those problems.

If there are no problems click the box(es) to the left of the page to select then hit the "Submit Voucher" button. Complete steps to electronically sign and electronically send your voucher to Niagara County.

You do not need to send the voucher summary to county, but you may want to keep this for your records.

Now you must send a paper copy of the Niagara County voucher along with Session Verification forms (for related services only), and all monthly supervision notes. Your voucher will not be downloaded or processed by the county until these items are received by Niagara County.

19. **Uploading Scripts and Medicaid Consents**

Upload all prescriptions for services into CPSE portal, as of Sept 2018 you only need to upload the file no need to data enter any of the prescription info into the CPSE Portal.

For instructions on upload a script review this Knowledge Base article
http://support.cpseportal.com/kb/a120/uploading-script-documentation.aspx?KBSearchID=7253

Niagara County continues to request provider assistance with obtaining the one time only Medicaid Consent (if you have it once and uploaded it we do not need again for the entire time the child receives CPSE Services.

For instructions on uploading the Medicaid Consent review this Knowledge Base article:

http://support.cpseportal.com/kb/a123/uploading-parental-consents.aspx?KBSearchID=7254