



This checklist is designed to assist Oregon school districts in completing the steps necessary to begin billing Medicaid. Many of the steps below can and should be completed concurrently. This checklist is meant to provide an overview of the required and recommended steps in the implementation process. Some steps may already be completed and/or do not apply. All steps highlighted in blue are required to bill. The other steps are meant as helpful recommendations to help support efficiency and compliance. Please contact Jennifer Dundon with any questions about this document and the content contained therein.

Step	Details	Contact
Meet with State School Medicaid Staff	Meet with State School Medicaid staff to discuss school district needs and vision. State staff can help provide an overview of both direct service and administrative claiming, provide historical context for school district billing, and can cater assistance depending on the readiness of the school district.	Oregon Department of Education: Jennifer Dundon jennifer.dundon@ode.oregon.gov Oregon Health Authority (OHA): Jennifer Smith Jennifer.R.Smith@oha.oregon.gov Lasa Baxter, by contract, lasa.baxter@imesd.k12.or.us
Conduct a Cost-Benefit Analysis	School districts can use the School Medicaid Cost-Benefit Analysis tool to determine whether the potential benefits outweigh the costs.	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov Lasa Baxter, by contract, (OHA) lasa.baxter@imesd.k12.or.us
Conduct a Readiness Assessment	School districts can use the School Medicaid Readiness Assessment tool in preparation for implementation of a School Medicaid program.	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov Lasa Baxter, by contract, (OHA) lasa.baxter@imesd.k12.or.us
Enroll as a School Medical Provider with the Oregon Health Authority	School districts must enroll with the Oregon Health Authority as a School Medical Provider. This may take time; it is recommended that this step is taken early. There is no cost to enroll. Please see final page for additional instructions about staff	Jennifer Smith (OHA) Jennifer.R.Smith@oha.oregon.gov and Provider Enrollment (OHA)



	enrollment. This is a critical step that must be completed before any billing can be submitted and before a 3rd party vendor can be set up.	
Enroll Medically Qualified Staff	By June 1, 2024, all medically qualified staff providing direct services billed to Medicaid will need a National Provider Identifier (NPI) and to be enrolled with the Oregon Health Authority to serve as the referring provider on claims submission.	Jennifer Smith (OHA) Jennifer.R.Smith@oha.oregon.gov and Provider Enrollment (OHA)
Set up systems	Determine whether claims will be submitted via: The Medicaid Provider Web Portal – A Medicaid system used by Medicaid-enrolled providers to verify Medicaid eligibility, bill claimable services, and adjust already submitted claims – OR - Electronic Data Interchange (EDI) system (third-party billing submission platform). This requires a Trading Partner Agreement and data file testing with the OHA). Please note: LEAs will need Web portal access to adjust submitted claims and paid incorrectly.	Provider Services Unit (OHA) EDI Support Services (OHA)
Identify the students that you intend to bill for	Verify Medicaid eligibility for students the school district plans to bill services for.	Lasa Baxter, by contract, (OHA) lasa.baxter@imesd.k12.or.us
	Review IEP health related services provided to students the district plans to bill for to ensure health services are clearly listed.	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov



	Review service documentation to ensure it compliant with licensing board and Medicaid requirements.	Jennifer Smith (OHA) Jennifer.R.Smith@oha.oregon.gov
Written Notification and Parent Consent	Provide written notification and obtain parent consent for students you intend to bill services for (signed consent forms become part of the student’s file. Parent consent must be on file for all dates billed to Medicaid). No billing can be done without parent consent. It is allowable to bill Medicaid for 12 months from the date of service. Obtaining parent consent as soon as possible may help optimize Medicaid reimbursement.	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov See ODE Parent Consent web page for written notification (581-1449-e) and parent consent (581-1450-p) forms
Cost Calculations	Complete and submit the cost calculation worksheet. This establishes the school district’s hourly cost per discipline. Worksheet and instructions can be found here . No billing can occur without reviewed and accepted cost-rates.	Lasa Baxter, by contract, (OHA) lasa.baxter@imesd.k12.or.us
Schedule Training	Potential trainings may include: <ul style="list-style-type: none"> • Provider web portal (OHA) • School Medicaid training for: <ul style="list-style-type: none"> ○ Medically qualified staff (OHA/ODE) ○ business office staff (OHA/ODE) ○ Medicaid coordinator (OHA/ODE) 	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov Jennifer Smith (OHA) Jennifer.R.Smith@oha.oregon.gov Lasa Baxter, by contract, (OHA) lasa.baxter@imesd.k12.or.us



	<ul style="list-style-type: none">○ Administrators (OHA/ODE)○ Other, as needed (TBD)● Third-party billing submission platform(s), if applicable. Before staff can be trained by 3rd party billing submission vendors, they must receive training from State School Medicaid Staff.	
Check-In with State School Medicaid Staff	As needed in support of sustainable School Medicaid billing.	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov Jennifer Smith (OHA) Jennifer.R.Smith@oha.oregon.gov Lasa Baxter, by contract, (OHA) lasa.baxter@imesd.k12.or.us