School Medicaid Billing Checklist: Purpose

Medicaid in Education

Oregon's School-Based Health Services (SBHS) Medicaid Program, also known as School Medicaid, is a partnership between the Oregon Health Authority (OHA) and the Oregon Department of Education (ODE) that supports increased student access to school health services by helping education agencies (EAs) get reimbursed for health services provided to Medicaid-enrolled children and young adults ages birth through 21.

Getting Started

Before an education agency can bill School Medicaid, several steps need to be taken.
This checklist is designed to assist Oregon EAs that have decided to bill School Medicaid in completing the required steps necessary to begin.

Many of the steps take time and should be completed concurrently

Contact information and key resources have been included with each step to provide extra support.

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Learn more at https://www.oregon.gov/ode/students-and-family/healthsafety/Pages/medicaid.aspx

School Medicaid Billing Startup Checklist

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For Medicaid Billing to occur, the following are REQUIRED to be in place:

- [x] School Medical Provider Enrollment
- [x] SBHS-Recognized Provider Enrollment and Verification
- [x] Medicaid Provider Web Portal Access
- [x] Written Notification and Parent Consent
- [x] Cost Based Rates & Match Payment Setup
- [x] Supporting Documentation

These additional steps are requirements when applicable:

- [ ] Trading Partner Agreement when using a 3rd billing platform (also known as an Electronic Data Interchange (EDI) system.
- [ ] Executed agreement if partnering with another education agency for Medicaid billing.

Learn more at https://www.oregon.gov/ode/students-and-family/healthsafety/Pages/medicaid.aspx

Startup Checklist: EA Enrollment

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Requirement

School Medical Provider Enrollment

Education agencies must enroll with the Oregon Health Authority (OHA) as a School Medical Provider. Separate provider enrollments are needed to bill for services provided under the Individuals with Disabilities Education Act (IDEA), non-IDEA, and Early Intervention/Early Childhood Special Education (EI/ECSE).

- **This is a critical step that must be completed before any billing can be submitted and before a Trading Partner Agreement (TPA) with a 3rd party vendor can be completed.**
- **This process takes time so education agencies should take this step early.**
- **There is no cost to enroll.**

Contact for assistance:

Provider Enrollment (OHA)
OHA SBHS Inbox: medicaid.sbhs@oha.oregon.gov

Key Resources:

OHA's Provider Enrollment Guide
Enrolling in Oregon School Medicaid webinar recording and slide deck.

Learn more at https://www.oregon.gov/oha/HSD/OHP/Pages/SBHS.aspx

Startup Checklist: Practitioner Enrollment

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Requirement

Verify and Enroll SBHS-Recognized Providers

Education agencies must verify and retain licensure and qualifications for each SBHS-recognized provider participating in the School Medicaid program, including those who are contracted.

All supervisory-level SBHS-recognized providers (e.g., registered nurses, physical therapists, occupational therapists, speech language pathologists, licensed audiologists, licensed clinical social workers, etc.) participating in Medicaid billing must be individually enrolled and have an active Medicaid provider ID. This includes contracted ESD or staffing agency practitioners.

- **Providers cannot be listed on claims until they receive their Oregon Medicaid ID. Applications may request a retroactive effective date of up to one year if the provider's license was effective and their NPI was active.**
- **This process takes time so EAs should take this step early.**

Contact for assistance:

Provider Enrollment (OHA)
OHA SBHS Inbox: medicaid.sbhs@oha.oregon.gov

Key Resources:

OHA's Provider Enrollment Guide
Enrolling in Oregon School Medicaid webinar recording and slide deck.

Learn more at https://www.oregon.gov/oha/HSD/OHP/Pages/SBHS.aspx

Startup Checklist: Provider Web Portal Access

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Requirement

Set up Medicaid Provider Web Portal Access

Medicaid-enrolled providers use the Medicaid Management Information System (MMIS) Provider Web Portal to verify Medicaid eligibility, bill claimable services, and adjust submitted claims.

The Provider Services Unit offers training and resources on the use of the Provider Web Portal.

Contact for assistance:

Provider Services Unit (OHA)

Key Resources:

MMIS Provider Portal
MMIS Provider Portal Resources
MMIS Provider Portal Guides
MMIS Provider Portal Instruction
HERC Prioritized List on the Provider Portal
Oregon Medicaid Eligibility on the Provider Portal

Learn more at https://www.oregon.gov/oha/HSD/OHP/Pages/SBHS.aspx

Startup Checklist: Parent Consent

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Requirement

Written Notification and Parent Consent

Provide written notification and obtain parent consent for students the education agency intends to bill services for. The signed consent form becomes part of the student's file and must be on file for all dates billed to School Medicaid.

- **No billing can occur without parent consent. Obtaining parent consent as soon as possible, and prior to evaluations conducted by SBHS-recognized providers, may help optimize School Medicaid reimbursement.**
- **The effective date of the consent is the date that it is signed.**

Contact for assistance:

Jennifer Dundon (ODE)
jennifer.dundon@ode.oregon.gov

Key Resources:

See ODE Parent Consent web page for written notification (581-1449-e) and parent consent (581-1450-p) forms. This page includes factsheets for parents to help them understand School Medicaid and the consent process.

Learn more at https://www.oregon.gov/ode/students-and-family/healthsafety/Pages/medicaid.aspx

Startup Checklist: Fiscal

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Requirement

Cost Based Rates and Match Payment Setup

Education agencies must complete and submit the cost-based rate calculation worksheet to OHA. This establishes the EA's hourly cost per discipline. Worksheet and instructions can be found here.

- **No School Medicaid billing can occur without reviewed and accepted cost rates.**

Education agencies are required to put up local match funds to draw down federal reimbursement for covered services. Match payments may be made electronically or via check.

- **Medicaid match funds should be tracked for IDEA Maintenance of Effort (MOE) purposes. If billing for multiple areas (EI/ECSE, School Age IDEA, Non-IDEA), develop a process to keep match payments for each provider enrollment separate to ensure that there is no impact on IDEA MOE.**

Contact for assistance:

- MOE and School Finance: Jennifer Dundon at jennifer.dundon@ode.oregon.gov
- Cost Based Rates: Lasa Baxter (OHA) at lasa.baxter@oha.oregon.gov

Key Resources:

- OHA Web Pages:
- Automated Clearing House (ACH) Setup for SBHS and MAC Payments
- Medicaid leveraging
- Medicaid Cost Based Rate Setting webinar recording and slides.

Learn more at https://www.oregon.gov/oha/HSD/OHP/Pages/SBHS.aspx

Startup Checklist: Supporting Documentation

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Requirement

Supporting Documentation

Supporting documentation includes all records required to bill Medicaid, including but not limited to:

- Written notification and parent consent
- Evaluations, assessments, and screenings
- Individual Plans of Care
- Service documentation

Contact for assistance:

Education Requirements: Jennifer Dundon at jennifer.dundon@ode.oregon.gov

Medicaid Requirements: OHA SBHS Inbox at medicaid.sbhs@oha.oregon.gov

Key Resources:

OHA's Supporting Documentation Guidance

Learn more at https://www.oregon.gov/oha/HSD/OHP/Pages/SBHS.aspx

Startup Checklist: Trading Partner Agreement

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Required, when applicable

☐ Trading Partner Agreement When Using a 3rd Party Billing Platform

Education agencies may use an Electronic Data Interchange (EDI) system (3rd party billing submission platform). This requires a Trading Partner Agreement (TPA) and data file testing with the OHA. Education agencies will need to have a TPA in place for each School Medical provider enrollment.

Please note:

- Data integration takes time. Include IT staff early to prevent delays in implementation.
- Clinical documentation is an essential element of Medicaid billing. Ensure systems are in place to support complete, timely, and service-specific documentation.

Contact for assistance:

EDI Support Services (OHA)
OHA SBHS Inbox:
medicaid.sbhs@oha.oregon.gov

Key Resources:

EDI and TPA Resources

Learn more at https://www.oregon.gov/oha/HSD/OHP/Pages/SBHS.aspx

Startup Checklist: Billing Partnerships

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Required, when applicable

☐ Executed Agreement if Partnering with Another Education Agency for Billing

The school district responsible for providing a free appropriate public education (FAPE) must consent to allow another EA to bill on their behalf. If an EA is partnering with another EA for billing support, OHA requires that the EAs have an executed agreement.

Contact for assistance:

OHA SBHS Inbox: medicaid.sbhs@oha.oregon.gov

medicaid.sbhs@oha.oregon.gov

Key Resources:

School Medicaid Provider Guide

Learn more at https://www.oregon.gov/oha/HSD/OHP/Pages/SBHS.aspx

Startup Checklist: Action Steps

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Have you completed the following requirements to begin billing School Medicaid?

☐ School Medical Provider Enrollment

Person Responsible:
Completion Date:
Notes:

☐ SBHS-Recognized Provider Enrollment and Verification

Person Responsible:
Completion Date:
Notes:

☐ Medicaid Provider Web Portal Access

Person Responsible:
Completion Date:
Notes:

☐ Written Notification and Parent Consent

Person Responsible:
Completion Date:
Notes:

Learn more at https://www.oregon.gov/ode/students-and-family/healthsafety/Pages/medicaid.aspx

Startup Checklist: Action Steps (cont.)

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Have you completed the following requirements to begin billing School Medicaid?

☐ Cost Based Rates & Match Payment Setup

Person Responsible:
Completion Date:
Notes:

☐ Supporting Documentation

Person Responsible:
Completion Date:
Notes:

When Applicable:

☐ Trading Partner Agreement When Using a 3rd Party Billing Platform

Person Responsible:
Completion Date:
Notes:

☐ Executed Agreement if Partnering with Another Education Agency for Billing

Person Responsible:
Completion Date:
Notes:

Learn more at https://www.oregon.gov/ode/students-and-family/healthsafety/Pages/medicaid.aspx