



School Medicaid Billing Startup Checklist

This checklist is designed to assist Oregon Education Agencies (EAs) in completing the steps necessary to begin billing School 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 recommendations to help support efficiency and compliance.

Step	Details	Contact
Meet with State School Medicaid Staff	Meet with State School Medicaid staff to discuss Education Agency (EA) needs and vision. State staff can help provide an overview of both direct service and administrative claiming, provide historical context for billing, and can cater assistance depending on the readiness of the EA.	Shelby Parks (ODE) shelby.parks@ode.oregon.gov
Conduct a Cost-Benefit Analysis	EAs 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 (OHA) lasa.baxter@oha.oregon.gov
Conduct a Readiness Assessment	EAs 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 (OHA) lasa.baxter@oha.oregon.gov
Enroll as a School Medical Provider with the Oregon Health Authority	EAs must enroll with the OHA as a School Medical Provider and maintain separate provider enrollments to distinguish billing for covered Individuals with Disabilities Education Act (IDEA) health services and non-IDEA health services. This takes time so EAs should take this step early. There is no cost to enroll. 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.	Provider Enrollment (OHA) OHA Inbox medicaid.sbhs@oha.oregon.gov
Enroll SBHS-Recognized Providers	All supervisory-level SBHS-recognized providers that provide direct services billed to School Medicaid need a National Provider Identifier (NPI) and to be enrolled with the OHA to serve as the referring provider on claims. See OHA's Referring Provider FAQ for additional information.	Provider Enrollment (OHA) OHA Inbox medicaid.sbhs@oha.oregon.gov



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 already submitted claims. The Provider Services Unit offers training and resources on the use of the Provider Web Portal.	Provider Services Unit (OHA)
Determine if EA will use a 3rd party billing submission platform	Electronic Data Interchange (EDI) system (3 rd party billing submission platform). This requires a Trading Partner Agreement (TPA) and data file testing with the OHA. EAs will need to have a TPA in place for each School Medical provider enrollment. Please note: <ul style="list-style-type: none">• If using a 3rd party billing submission platform, EAs will still need Medicaid Provider Web Portal access to adjust submitted claims that paid incorrectly.• Before staff can be trained by 3rd party billing submission vendors, they must receive training from State School Medicaid Staff (see below).	EDI Support Services (OHA)
Identify the students that EA intend to bill for	<ul style="list-style-type: none">• Verify Medicaid eligibility for students the EA plans to bill services for via the Medicaid Provider Web Portal.• Review service documentation to ensure it is compliant with licensing board and School Medicaid requirements.• Review IEPs, IFSPs, or other Individual Plans of Care (IPOCs) health services provided to students the EA plans to bill for to ensure requirements are met.	OHA Inbox medicaid.sbps@oha.oregon.gov Shelby Parks (ODE) shelby.parks@ode.oregon.gov
Written Notification and Parent Consent	Provide written notification and obtain parent consent for students the EA intend to bill services for (the signed consent form become part of the student's file. Parent consent must be on file for all dates billed to School Medicaid). No billing can occur without parent consent. It is allowable to bill School Medicaid for 12 months from the date of service. Obtaining parent consent as soon as possible, and	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



	<p>prior to evaluations conducted by SBHS-recognized providers, may help optimize School Medicaid reimbursement.</p>	
Cost Calculations	<p>Complete and submit the cost calculation worksheet. 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.</p>	Lasa Baxter (OHA) lasa.baxter@oha.oregon.gov
Schedule Training	<p>Potential trainings may include:</p> <ul style="list-style-type: none">• School Medicaid training for:<ul style="list-style-type: none">○ Medically qualified staff (OHA/ODE)○ Business office staff (OHA/ODE)○ Medicaid coordinator (OHA/ODE)○ Administrators (OHA/ODE)○ Other, as needed (TBD)	Shelby Parks (ODE) shelby.parks@ode.oregon.gov
Check-In with State School Medicaid Staff	<p>As needed in support of sustainable School Medicaid billing.</p>	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov Shelby Parks (ODE) shelby.parks@ode.oregon.gov OHA Inbox medicaid.sbhs@oha.oregon.gov