

Individual Plan of Care Guidance

Medicaid is a state and federal partnership that plays a vital role in funding health and medical services for eligible beneficiaries. School Based Health Services (SBHS) Medicaid program provides partial reimbursement to education agencies¹ for [Medically Necessary and Medically Appropriate](#) Medicaid-covered services provided to children and young adults (birth to age 21) in education settings. Medicaid requires supporting documentation for all services.

The Oregon Health Authority (OHA) has introduced the Individual Plan of Care (IPOC)². The IPOC is a general term that may cover a variety of plans and does not replace the Individualized Education Program (IEP) or the Individualized Family Service Plan (IFSP). The IEP or IFSP may serve as an IPOC. The elements required to bill Medicaid are identified in the table below and may be found between the IPOC and supporting documentation.

Elements Required to Bill Medicaid	
IPOC	Supporting Documentation
<ul style="list-style-type: none">Effective date	<ul style="list-style-type: none">Date, location, and duration of service
<ul style="list-style-type: none">Education Agency name	<ul style="list-style-type: none">Medical need for the service
<ul style="list-style-type: none">Child or young adult's first and last name	<ul style="list-style-type: none">Name of the individual providing the service
<ul style="list-style-type: none">Health service type	<ul style="list-style-type: none">Name of the individual supervising the service (when applicable)
<ul style="list-style-type: none">Nature, extent, or units of service	<ul style="list-style-type: none">Child or young adult's first and last name (number in group, when applicable)
<ul style="list-style-type: none">Therapeutic value of service	<ul style="list-style-type: none">Child or young adult's Medicaid ID
<ul style="list-style-type: none">End date (when applicable)	<ul style="list-style-type: none">Child or young adult's diagnosis code

¹ See Oregon Administrative Rule (OAR) 410-133-0040

² See OAR 410-133-0050

	<ul style="list-style-type: none"> • Signed parent/guardian consent
	<ul style="list-style-type: none"> • Licensed Practitioner Recommendation

*Education agency name must be listed on supporting documentation as well.

If all required elements are met the following plans may serve as an IPOC:

- Individualized Education Program (IEP)
- Individualized Family Service Plan (IFSP)
- Individualized Healthcare Plans (IHP)
- Any individualized health or behavioral health plans containing the required elements, which may include, but are not limited to:
 - Nurse treatment plans of care
 - Occupational therapy service plans
 - Physical therapy plans of care
 - Behavioral health service plans

*Section 504 Plan Consideration

If considering using a Section 504 plan as the IPOC, recommended practice is to have the IPOC as a separate attachment linked to the Section 504 plan, rather than updating the Section 504 plan to contain all the required IPOC elements. For example, for a student who has a Section 504 plan for diabetes management in place, the additional “prescriptive” elements for the IPOC could be contained in the student’s nursing plan of care and supporting documentation (log notes, evaluations/assessments, written recommendation).

The following services may be performed in relation to, or in the development of, an IPOC but do not need to be listed specifically in an IPOC.

- Evaluations and assessments
- Care coordination and consultation when provided as directly related to the SBHS specified on the IPOC
- Episodic occurrences for chronic conditions (i.e. seizures, allergies, asthma)

In the absence of the IPOC, the supporting documentation for these services must include all elements required to bill Medicaid (all the elements listed in the table under IPOC and supporting documentation in the above table).

*Please note: The effective date of a parent/guardian consent is the date that it is signed. Education agencies may want to develop a written notification and parent/guardian consent process where consent is obtained prior to conducting evaluations.

You can get this document in other languages, large print, braille, or a format you prefer free of charge. Contact the School-Based Health Services Medicaid Program at Medicaid.SBHS@oha.oregon.gov.

Medicaid Division
School-Based Health Services Program

