SpEdDoc Medicaid Guide

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For SpEdDoc 13

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Introduction

This guide is designed to help users of SpEdDoc 12 or later take advantage of the latest Medicaid case management and documentation features. It does not substitute for the AOE's Medicaid Manual, which explains the requirements of the billing program.

Submitted Electronically

Some SD/SU's use the Submitted Electronically (Signed Electronically) process to permit a case manager to "sign" a service or provider log by checking a box on the form (do not use this feature unless so directed by your SD/SU). To ensure that the specific log is not modified by someone other than the one who submitted the log, the log is locked once the Submitted Electronically box is checked. At that point, no one else can edit the log (unless the one who submitted it deselects the Submitted Electronically box).

To use the Submitted Electronically feature, the case manager must first create a Medicaid Password on the Begin screen. While on that screen, the case manager clicks on the New button to create a password. Once created, the Medicaid password must be entered on the Begin screen in addition to the User Code if the case manager will be making changes to locked forms or checking the Submitted Electronically box. In the future, the case manager can use the Modify button on the Begin screen to change the password.

Other users, such as Medicaid clerks, cannot modify a record once it has been locked (but Medicaid Clerks can use Submitted Electronically for the LOC - see details in Level of Care section). However, other personnel can print locked records and use the Duplicate Record button to duplicate locked records in order to start a new ones (duplicated records are not initially signed/locked when created). Up to three case managers may be assigned to a student using the Add CM feature. For example, if the special educator is the primary case manager but the SLP is assigned as a secondary CM, then the SLP can create a Medicaid password and use the Submitted Electronically process.

If you do not use the Submitted Electronically process (i.e., never check the Submitted Electronically box), then you do not need a Medicaid password to use the Medicaid forms.

Medicaid User Values

Save time by populating the Medicaid User Values so frequently used information displays in popups. Go to any Medicaid form (from Student Portals > Med-

icaid) and then to User Values by selecting Scripts > Edit User Value Lists - Current Area. The User Values and the forms they appear on include:

- CM Name: LOC, Evaluation and IEP Logs
- Doctor's Name, Phone and Address: Release of Information and Physician Authorization
- Notice Sender, Position and Phone: Release and Physician Authorization Letters
- Provider Name and Title: Related Services, DAT, Personal Care, CM Assurance

Main Medicaid Record

Access the main Medicaid record through Student > Portals (click on the Medicaid tab). Click on the New button for the Medicaid record or, if there is an existing record, click on the Go button at the beginning of that record line. Since the Service and Provider Logs are now separate from the main Medicaid record, you may find that you only need one Medicaid record per student while maintaining multiples of one or more of the provider forms. Once in the main Medicaid record, you'll see a row of buttons to access forms and other features.

Main Menu

This screen includes the following buttons:

- Status Report: This shows a list of the found set of Medicaid records with information useful for case management. Note that the Medicaid List (Student > Main Menu) may be more useful since it contains one record per student and can be sorted by several column headings. If you do use the Status Report, select *Find All Students for User* from the Scripts menu on the FileMaker toolbar to view all your records.
- Edit User Values: This shows the lists that popup on the Medicaid forms. You can add to these user-editable lists. The three columns with a blue background are linked so that the doctor's phone and address will fill onto forms when the doctor's name is selected.

List View

This screen displays a list of the found set of Medicaid records (select *Find All Students for User* from the Scripts menu on the FileMaker toolbar to view all your records). Click on a student's name on the list and then navigate to one of the forms on the button row.

Release of Info and Release Letter

These forms are used to obtain permission to begin the process for Medicaid billing. They largely auto-fill based on data in Student. If the physician information is entered in User Values, selecting the physician's name will auto-fill the phone and address.

Physician Authorization and Physician Letter

These forms are used to obtain a physician's authorization to bill Medicaid for services. They largely auto-fill based on data in Student.

Release of Info/18

Release of Information IEP 18 Year Old Student is used to obtain permission to begin or continue the process for Medicaid billing when a student becomes a legal adult. It largely auto-fills based on data in Student. If the physician information is entered in User Values, selecting the Physician's Name will auto-fill the phone and address.

Service Logs

Access the Service Logs through Student > Portals (click on the Medicaid tab). Click on the New button for the desired pink or blue log or, if there is already a record, click on the Go button at the beginning of that record line to view the existing record. Click the expansion icon to the right of the logs to expand the view beyond the default two lines (see image). Note that, to retain an existing log in SpEdDoc, you must create a new record. Overwriting an existing record will permanently remove the old information. Disregard the "Submitted Electronically" feature unless your school system directs you to use it. The bottom box is reserved for use by the Medicaid clerk.

Evaluation Service Log

Three-Year Special Education Re-evaluation Service Log largely auto-fills the top section based on data in Student (make sure that the Diagnostic Code has been entered on Student > Main Data). Check at least 6 items in the left hand column (be sure to include item 10).

IEP Service Log

Annual IEP Service Log – Case Management largely auto-fills the top section based on data in Student (make sure that the Diagnostic Code has been entered on Student > Main Data). Check at least 6 items in the left hand column.

Provider Logs

Access the Provider Logs through Student > Portals (click on the Medicaid tab). Then do one of the following:

- Click on the triangular button (to the right of the last four log forms) to expand that portal beyond the default two lines that show for each form,
- Click on the New button to create a new log, or
- If there is already a record, click on the Go button at the beginning of that record line to view the existing record.

Note that, to retain the data on an existing log in SpEdDoc, you must create a new record. Overwriting an existing record will permanently remove the old information.

If you have completed Provider Logs for a billing period and want to create logs for the next period, use the Duplicate Record button. This button copies the current record except for the data specific to that billing period (e.g., data entered on calendars or the RS Activity Description section). If you have a found set of records to be duplicated, hold the Control key while clicking the Duplicate Record button to copy all of them at once.

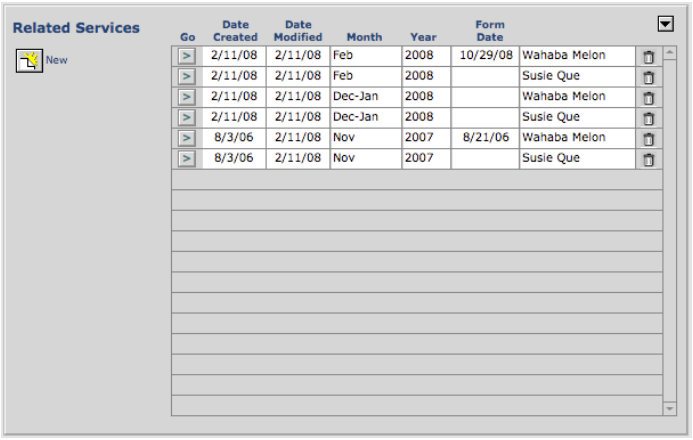
You can find a set of records so you can print or duplicate them all at once. For instance, if you are on a DAT log for March 2013 and have completed all your logs for that period, click on the *Find All* button to create a found set of DAT logs for March 2013. To duplicate all of those records in preparation for the next billing period, hold the Control key while selecting the Duplicate Record button.

To print the found set of logs (except for Related Services logs), select Print Page and, in the Print dialog, switch from *Current Record* to *Records being*

browsed before printing (if you don't see these options in the Print Dialog, you may first need to switch from *Copies & Pages* to *FileMaker Pro*).

To print the found set of Related Services logs, select Print Page and, in the ensuing dialog, select Found. This brings up the Print dialog (simply select Print).

Related Services Log



Related Services Documentation Log can be completed electronically or printed and completed manually. Select the billing period (Month and Year) on top of the layout before entering services or printing forms. Click on the Current Billing button to show the current billing period or click the Month and Year to pick the desired billing period. The Current Billing button is only available if no services have been entered on the lines below.

Click the Add button to enter a service. In the Sm Grp or Indiv column, indicate whether a service was provided in an Individual or Group context or (optionally) give a reason for the service not being provided (refer to the key in the blue note on the right side of the screen). If the service lines are entered electronically, the form will automatically total the time.

If you add one or more lines to the service description section (even if you leave them blank), then selecting the Print Page button generates a form with most of the blank service lines removed. If nothing is added in the service description section, then selecting the Print Page button generates a one-page form with 15 lines to write in service data. To clear the service descriptions, use the trash can icons to the right of the service lines (simply deleting data from the fields will not trigger the one-page printed form with lines). Also note that Current Billing button is only available when no service lines have been added.

The Description column includes an auto-complete feature that finds matching text as you type. Ignore this and continue typing to write something new. If you see what you want highlighted, press tab to enter it. If

you see a list of matches and want something further down the list, click on the one you want. The auto-complete items stem from all the past Description entries, including those from other users of a server-based SpEdDoc installation. Consequently, do not include identifiable information such as a student's name in the Description (the student's name is already on the top of the form).

Developmental & Assistive Therapy Log

Developmental & Assistive Therapy Services Documentation Log can be completed electronically or printed and completed manually. Select the billing period above the calendar before entering services or printing forms. Click on the Current Billing button to show the current billing period on calendars or click the Reselect button to select the first month of the billing period. For two-month billing periods, both months will show.

You may complete the form except for the calendars and print in order to finish the logs manually. Or, you may document the services on the appropriate dates prior to printing in order to complete the form on the computer (the form will automatically total the time). Click once on a box to select from popup choices or, if the service time differs from what the IEP specifies, double-click to type the actual minutes of service provided on a given date. To clear an entry, click the box and use the Delete key.

Starting with the July 2013 billing period, there are two places on each date to enter service time - Individual services on top and Group on the bottom.

Personal Care Log

Personal Care Services Documentation Log can be completed electronically or printed and completed manually. Select the billing period above the calendar before entering services or printing forms. Click on the Current Billing button to show the current billing period on calendars or click the Reselect button to select the first month of the billing period. For two-month billing periods, both months will show.

You may complete the form except for the calendars and print in order to finish the logs manually. Or, you may enter the services on the appropriate dates prior to printing in order to complete the form on the computer (the form will automatically total the time). Double-click to type the hours provided on a given date or, optionally, click once on a box to select from

popup choices that explain why a service wasn't provided. To clear an entry, click the box and use the Delete key.

Personal Care Verification

Personal Care Verification can be completed electronically or printed and completed manually. Completing the form electronically offers the advantage of automatically totaling the times that are entered. However, it will not total if either of the questions on top of the form are answered negatively.

Case Management Assurance

Case Management Assurance can be completed electronically or printed and completed manually. Select the billing period (Month and Year) on top of the layout before entering services or printing forms.

This form documents the amount of case management provided during a billing period. A single CMA record can be used or, if you wish to retain an electronic record for each billing period, new records can be created either from Student Portals or from the CMA form itself (click the Duplicate Record button located under the print buttons).

Case Management Tools

Main Menu and Main Data in Student contain tools to assist with Medicaid case management. Using the list and report saves time by eliminating the need to track information on a separate spreadsheet.

Medicaid List

The Medicaid button on the Lists side of Student > Main Menu provides access to information that can be used to verify and track Medicaid eligibility. For server-based schools, the last column can be used by the Medicaid clerk to communicate with case managers. For instance, the Medicaid clerk can indicate documents that need to be completed for specific students. Then case managers can refer to the list at any time to view a list of outstanding items. Click the italicized headings to sort the list (e.g., click on the Med Elig heading to sort by eligibility).

Medicaid List includes two print buttons on the bottom right of the screen. Landscape prints on standard letter paper while Legal requires legal paper.

Medicaid by CM Report

The Medicaid button on the Reports side of Student > Main Menu provides information from the Medicaid List sorted by case manager. After clicking the button, a dialog offers the option of viewing and printing continuously or with a new page for each case manager. Print the document in landscape orientation. Use legal paper in order to include the Other column, or manually change to letter size in the print dialog.

Medicaid Box on Main Data

The Medicaid box on Main Data provides a place to enter basic Medicaid data on each student. That information displays on the Medicaid List and Report and also transfers to Medicaid documents when you create them.

Level of Care

Level of Care Billing Documentation Form is the responsibility of Medicaid clerks. This form largely auto-fills the top section based on data in Student. The LOC services may be entered manually, or the Category and Type data can be automatically transferred from the current IEP. To transfer services from an IEP, select the IEP based on Initiation Date using the box on the right side of the LOC layout (you may need to scroll right to view it). Follow the instructions detailed under AutoLOC Feature.

AutoLOC Feature

The Service and Type can be transferred from the IEP Services List to a Medicaid LOC form. The transfer occurs according to the following rules:

• The IEP service will be entered into the Medicaid Service Category if it matches the following items:

Case Management	Occupational Therapy
Dev. & Asst. Therapy	OT
Mental Health Counseling	Physical Therapy

Nutrition	PT
Rehabilitative Nursing	Speech, Hearing & Language
Vision Care	Speech/Language
Personal Care	Speech Language

- If the IEP service doesn't match the state's LOC Services list, and it has an IEP service category of SpEd, then the IEP service will be entered into the Developmental and Assistive Therapy Description column and Dev & Asst. Therapy will be entered into the Medicaid Service Category column.
- All services transfered from the IEP Services page show on the right hand side of the Full LOC data entry form for convenient reference.

Check the AutoLOC box for each service that is Medicaid billable. Services that are red on the IEP Services List automatically trigger RS in the Category column. Execute the transfer using the AutoLOC button located to the right of the IEP Services portal (click the Create New LOC button if the student doesn't already have a LOC). If there is more than one Medicaid record for the student, select which one you want services to transfer to (the From and To billing dates will show if they have been entered on the LOC). If you select a pre-existing LOC, any services previously entered on the LOC will be replaced by those that are currently selected in the AutoLOC column of the IEP.

Full.Mid-Month and Multi LOC's

The AutoLOC process sends data to the Full, Mid-Month and Multi LOC forms so you can decide which form is appropriate for a given billing period. The full LOC appears by default, so click on the Mid or Multi tabs to switch forms.
It's generally best to use the AutoLOC process to ensure that the services on the IEP and LOC match. However, to manually enter services, select from the popup menus and enter the time in hours (the units will auto-calculate).

To edit existing data, double-click on the item. To delete an item, click on the trash can icon at the end of the line.

When the LOC has been completed, the Medicaid Clerk may print the form or, if local practice allows, enter his or her name and then select the Electronically Submitted box (see next section). To have your name popup in the signature line, go to an LOC form and then User Values by selecting Scripts: Edit User Value Lists - Current Area (enter Medicaid Clerk's name in the Notice Sender column). When printing a Mid-Month LOC, the third page will not print automatically if there are no school days entered for the IEP 3 column.

Submitted Electronically

The Medicaid Clerk cannot use the Submitted Electronically feature on service and provider forms, but can use it for the LOC. Check with your special education director if you are not certain whether your SU/SD uses the Electronically Submitted process. To use the Submitted Electronically feature to sign the LOC, the Clerk must first create a User Code and Medicaid Password on the Begin screen. While on Begin, the Clerk enters a self-created User Code and then clicks on the New button to create a self-created Medicaid password (the password indicator turns green when the process has been successfully completed). Once created, the same User Code and Medicaid password must be entered on the Begin screen whenever the Clerk will be making changes to locked LOC forms or checking the LOC Submitted Electronically box. Use the Modify button on the Begin screen to later change the password. The User Code and Medicaid password do not provide access to records (the Clerk still needs to enter a school or SU-level password for access).

Submitted Electronically allows a user who would otherwise print and sign a form to instead submit and lock the form based on a User Code/Medicaid Password combination. Each person needs a unique User Code and a confidential Medicaid Password in order to ensure that no one else is modifying their documents after they "sign" them. The DOE requires assurance that the person who submits a form is the one who signed it. The SpEdDoc Submitted Electronically process was created because the DOE found in past years that other people were modifying forms after a provider Submitted Electronically. The DOE would no longer allow schools to use the Submitted Electronically process unless that was prevented.