

## Designated Case Manager – 135 Teacher Consultant - 139

### Case Management Guidelines:

- Student's only have *one Case Manager*, usually the Special Education Teacher/Teacher Consultant who coordinates the IEP/IFSP meetings
- Student must receive a DIRECT or DIRECT/CONSULT medically-related service pursuant to their IEP/IFSP (i.e. Speech, OT, PT, etc.) in order for case management to be billable
- Case manager is responsible for obtaining One-Time Parental Consent  
Case manager will provide the parent/guardian with Annual Notification

### Medicaid Billable Case Management Services:

A. Assuring that standard re-examination and follow-up are conducted on a periodic basis to ensure that the student receives needed diagnosis and treatment.

Examples include:

- Contacting service providers regarding student's IEP progress,
- Coordinating meetings to discuss plan of care progress and all related preparation.

B. Assisting families in identifying and choosing the most appropriate providers of care and services, scheduling appointments, and helping families maintain contact with staff and outside providers.

Examples include:

- Linking parents with providers (providing contact info, scheduling appointments, etc.)
- Assist families with questions re: providers and available services

C. Follow-up to ensure that the student receives needed diagnostic and treatment services.

Examples include:

- Discussing student progress with service providers
- Reviewing IEP to ensure services are being provided as specified
- Reviewing IEP to determine progress in goal areas
- Schedule student's services (OT, PT, speech, social work, etc.)

D. Assuring that case records are maintained and indicate all contacts with, or on behalf of, the student.

Examples include:

- Reviewing, organizing and updating student files
- Updating and collecting student health forms, updating student contact info
- Reviewing psychology reports

E. Coordinating school-based services and treatment with parents and the child.

Examples include:

- Communicating with student's family about IEP goals / services
- Scheduling conference times with parents and service providers
- Attending conferences with student's family to review IEP goals

F. Monitoring and recommending a plan of action.

Examples include:

- Coordinating behavior intervention meetings with team members
- Making necessary arrangements or adjustments if there are any changes in the needs or status of student

G. Coordinating the performance of evaluations, assessments and other services that the student needs.

Examples include:

- Coordinating and scheduling REED / MET
- Notifying participants of meetings (e-mail, letters, phone calls)
- Gathering documents necessary for assessment or referrals

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H. Facilitating and participating in the development, review, modification and evaluations of the IEP/IFSP or Manifestation Review meeting.

Examples include:

- Scheduling IEP / IFSP, sending out invites, attending IEP/ IFSP
- Gathering documents necessary for IEP / IFSP
- Completing amendment to authorize personal care services

I. Activities that support linking and coordinating needed health services for the student.

J. Summarizing provider, parent and student consultation.

K. Coordinating with staff/health professionals to establish a continuum of health and behavioral services in the school setting.

Examples include:

- Coordinating services with principals, counselors, Personal Care Aides.

Examples of Non-billable Services	
<b>Non-Billable</b>	<p><b>Consult Only</b> – Use for logging students with consult only services listed in the Program &amp; Services section of their IEP</p> <p><b>Monitoring</b> – Use for logging students with monitoring service listed in the Accommodation section of their IEP</p> <p><b>Behavior Plan Meeting</b> – use to log for students with a behavior plan</p> <p><b>Communications</b> – Use to log communications with parent, other providers, staff,</p> <p><b>Attendance</b> - Use to log when a student is missing therapy(ies) due to absences</p> <p><b>No School Day</b> – Use to document snow days or other no school day</p> <p><b>Record Keeping</b> – Use for any student record keeping purposes you want to track</p> <p><b>Student Observation</b> – Use to document time observing students for evaluation purposes</p>

**Reminders and Tips:**

- Case management is a “per month” service, so the service date is the **last school day of the month**
- The service note field is required – case managers can write “see Monthly Summary”
- Monthly summary notes should list:
  - ALL of the dates services were provided
  - Individuals involved (no names, just titles)
  - The service provided
  - The outcome or resolution if applicable

**Example:**

Service Date – 10-31-2019

10/10 – Reviewed student’s progress report for advancement of speech and social work goals and sent to parents.

10/14 – Discussed student’s progress with speech path, no changes needed to treatment plan. 10/20 – Followed up on evaluations and invited parents and staff to 3 year re-evaluation MET and IEP. 10/26 – Facilitated and participated in the IEP Meeting.

**\*Services won’t be submitted to the state until you mark them “Ready to Bill”, be sure to click on “OK” when prompted. This includes all Non-billable services.**