

# Targeted Case Management

## Case Management Guidelines

- You must be the student's Case Manager (the person responsible for the student's IEP/IFSP) to log Case Management services.
- There may be only one Case Manager per student.
- To log Medicaid services, the student's IEP/IFSP must prescribe at least one **direct** service to address a medical disability. These services include: Social Work, Occupational Therapy, Physical Therapy, Nursing, Speech, Audiology, and Orientation and Mobility. Services listed in the IEP as Consult or Supplemental do not qualify for Medicaid logging.
- Case Management logs are always related to adult-to-adult interactions. It does not include the teacher's direct work with the student.

## Case Management Billable Services

The Case Manager is the person responsible for the implementation of the student's IEP. They coordinate activities to assist the student receiving special education or early intervention services to gain access to needed medical, social, educational, and other services. Examples of billable services include but are not limited to:

- Contacting service providers regarding student's IEP progress
- Coordinating meetings to discuss plan of care progress and all related preparation
- Scheduling services
- Making referrals and scheduling appointments for needed services
- Completing forms or reports requested by student's physician
- Communicating with other agencies regarding services
- Linking parents with providers
- Assist families with questions regarding providers and available services
- 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 progress
- Discussing student progress with service providers
- Reviewing IEP to ensure services are being provided as specified in the IEP
- Reviewing IEP to determine progress in goal areas
- Setting up therapy schedule for student (OT, PT, speech, etc.)
- Collaborating with service providers to develop IEP goals/objectives
- Reviewing, organizing, and updating student files/CA-60s
- Updating and collecting student health forms
- Reviewing psychology reports
- Identifying the student's needs and completing related documentation
- Coordinating and scheduling REED/MET
- Coordinating services with principal and counselors
- Notifying participants of meeting (phone calls, letter, email)

## IEP/IFSP Participation

An IEP/IFSP log should be entered when logging for your attendance at the student's IEP meeting or if amending the IEP. The date of service is the date the IEP meeting was held. *All prep work for the IEP meeting should be documented in a Case Management log.* Please note: You may NOT bill for the initial Eligibility Determination or IEP/IFSP. Case Management services start *AFTER* the student is certified as Special Education.

## Example Case Management Logs

The Michigan Department of Health and Human Services (MDHHS) has emphasized the importance of thoroughly documenting all services provided. Below is an example of what a month of case management logs may look like for a student:

### Case Management Log Examples:

- 9/6/2021: Reviewed Jane's file and IEP to determine services for the new school year. Jane receives direct OT and SLP services.
- 9/7/2021: Contacted SLP and OT regarding Jane's services and schedule – OT therapy will be Tuesdays and SLP on Mondays and Thursdays.
- 9/8/2021: Prepared and distributed accommodations sheets to help ensure student success.
- 9/13/2021: Met with behavioral specialist, social worker, and other teachers regarding behaviors student is exhibiting. A behavior plan is being recommended. Parents contacted and informed of situation.
- 9/15/2021: Developed behavior plan with IEP team to address recent behavior issues. Implementations to begin next Monday.

## Contact Us

If you have any questions on Medicaid logging or would like training on the EdPlan system, please let us know.

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