

This checklist is designed to assist Oregon Education Agencies (EAs) in completing the steps necessary to begin billing School Based Health Services (SBHS), also referred to as School Medicaid. This checklist is meant to provide an overview of the required and recommended steps in the implementation process. Many of the steps below can and should be completed concurrently. **All steps highlighted in blue are required to bill.** The other steps are meant as recommendations to help support efficiency and compliance. Some steps may not apply.

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 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.	Jennifer Dundon (ODE) jennifer.dundon@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
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
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 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. This takes time so EAs should take this step early. There is no cost to enroll.	Provider Enrollment (OHA) OHA SBHS Inbox lasa.baxter@oha.oregon.gov
Enroll SBHS-Recognized Providers	All supervisory-level medically-qualified individuals providing 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 SBHS 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: 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	Verify Medicaid eligibility for students the EA plans to bill services for via the Medicaid Provider Web Portal.	OHA SBHS Inbox medicaid.sbhs@oha.oregon.gov
	Review IEPs, IFSPs, or other Individual Plans of Care (IPOCs) ¹ with health services to ensure requirements are met.	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov
	Review service documentation to ensure it is compliant with School Medicaid requirements.	OHA SBHS Inbox medicaid.sbhs@oha.oregon.gov
Written Notification and Parent Consent	Provide written notification and obtain parent consent for students the EA intends to bill services for (the signed consent form becomes part of the	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov See ODE Parent Consent web page for written notification (581-

¹Individual Plan of Care, as defined by Oregon Administrative Rule (OAR) 410-133-0040, means a prescriptive document for billing Medicaid for each school-based health service provided to a child or young adult in the school setting. To serve as the prescriptive document the plan must include the education agency's name, the specific child or young adult's first and last name, and each necessary and appropriate health service category including the nature, extent, or units of service and therapeutic value for each service.



	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 prior to evaluations conducted by SBHS-recognized providers, may help optimize School Medicaid reimbursement.	1449-e) and parent consent (581-1450-p) forms
Cost Calculations	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.	Lasa Baxter (OHA) lasa.baxter@oha.oregon.gov
Schedule Training	Potential trainings may include: • School Medicaid training for: ○ SBHS-recognized providers (OHA/ODE) ○ Business office staff (OHA/ODE) ○ Medicaid coordinator (OHA/ODE) ○ Administrators (OHA/ODE) ○ Other, as needed (TBD)	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov
Check-In with State School Medicaid Staff	As needed in support of sustainable School Medicaid billing.	Jennifer Dundon (ODE) jennifer.dundon@ode.oregon.gov OHA SBHS Inbox medicaid.sbhs@oha.oregon.gov