

Logging Service Records in PSSP – [Case Managers](#)

All logged services are due the 15th of the following month (eg. September due October 15th).

CASELOAD: It is important to keep your caseload current. Add new students and remove students as necessary. If removing a student, do this only after all Service Records have been completed.

*PSSP homepage: Report titled [\[WISD\] My Medicaid Caseload](#) (right column) automatically lists who on your caseload is Medicaid eligible. **NOTE:** These are the students for whom you log Services + a Monthly Summary, and if you do not see the *'My Medicaid Caseload'* report on your homepage, please contact me.

Logging Service Records:

1. **PSSP Homepage:** Scroll down to your caseload and click the **Calendar icon** to the left of student name
2. Highlight the Student for whom you are logging services, or check the box, if using a Mac
3. Select the calendar date of your service. Right click on that date. Click **Record Past Service**.
4. Fill in the following fields: **Service** – click on Targeted Case Manager

Service Type:

- If attending/amending/doing prep for an IEP/IFSP, select [IEP/IFSP Participation \[T1024 TM\]](#)
NOTE: All time spent on an IEP goes in one service captured on the date of the IEP meeting.
- All other case management activities (coordinating/reviewing/consulting/updating/discussing/meetings, etc.) select [Targeted Case Management Services \[T2023\]](#). (See list of billable activities on next page.)
- If documenting academics for record-keeping purposes, select ["Other - Academics"](#)
- If completing a monthly summary, select [Monthly Progress Summary](#)

Fill in the **Time** of your service, and fill in how long it lasted (total minutes) in the **Duration** field.

Fill in **Progress Report**. Select from the drop-down your student's overall progress in the classroom. If it is not applicable to the service you are logging, select (NA) Not Applicable.

5. **Provider Notes:** This field must include enough detail to allow reconstruction of what transpired for each service you are logging; e.g., who was present, what was done or discussed, what is the plan going forward.
6. **Areas Covered/Assessed:** At least one area needs to be selected. If none fit, choose "Other" and specify what "Other" is in the field to the right.
7. Check the box titled: **Has this service been completed?** and click **Save**.

*Logging Monthly Progress Summaries for **MEDICAID ELIGIBLE STUDENTS ONLY!**

- Monthly Progress Summaries must be dated in the month the services were provided.
NOTE: Using the last school day of the month is recommended.
- Repeat Steps 1-4 from above. **NOTE:** For **Service Type**, you **must** select ["Monthly Progress Summary"](#)
- **Duration** is not required for monthly summary.
- **Provider Notes:** Summarize how the student did overall during the month. Include evaluation of progress, changes in medical and mental status, and any changes in treatment with rationale for change.
- **Areas Covered/Assessed:** Choose **Monthly Summary**.
- Check the box titled: **Has this service been completed?** and click **Save**.

CASE MANAGER TIP SHEET: *Options of Billable Items (Resource Rm and Self-Contained)*

Case Management is a “per month” service.

1. Record a minimum of one Case Management Service from the list below and one Monthly Progress Summary per month for each Medicaid eligible student on your Caseload. *Please use “Other/Academics” for anything not on the below list and academics related.*
2. If you attend or amend an IEP/IFSP, select IEP/IFSP Participation, and log that as well.
3. Provider Notes: Include enough detail to allow reconstruction of what transpired for each service.
4. All logged services are due the 15th of the following month (eg. September due October 15th)

PLEASE NOTE: Below are examples of billable activities for Targeted Case Management Services [T2023] only. These comments alone do not include sufficient detail for a provider note; make sure to describe the specific details of the service.

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

- Coordinating transition planning meetings
- Contacting service providers regarding student’s IEP/IFSP progress
- Coordinating meetings to discuss plan of care progress and all related preparation

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

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

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

- Discussing student progress with service providers
- Reviewing IEP to ensure services are being provided as specified
- Reviewing IEP to determine progress in goal areas (not academic goals)
- Setting up therapy schedule for student (OT, PT, speech, social work, etc.)

Maintenance of student records

- Reviewing, organizing, updating student files, CA-60s; reviewing psychologist’s reports, etc.
- Updating and collecting student health forms, updating student contact info
- Track/record student progress towards IEP/IFSP goals and objectives

Coordinating school-based services and treatment with parents and/or the child

- Communicating with student’s family about IEP/IFSP goals and services
- Scheduling conference times with parents and service providers
- Preparing and distributing progress reports to family
- Attending conferences with student’s family to review IEP/IFSP goals (may be a phone conference)

Monitoring and recommending a plan of action

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

Coordinating evaluations, assessments and other services the student needs

- Coordinating and scheduling REEDs and or METs
- Notifying IEP/IFSP Team and parents of meetings (email, letters, phone calls); sending forms for signature
- Gathering documents necessary for assessment or referrals

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

- Scheduling IEP/IFSP, sending out invites, attending IEP/IFSP; gathering documents necessary for IEP/IFSP
- Collaborating with service providers to develop goals; identify needs
- Completing amendments to authorize personal care services

Activities that support coordinating health services

- Making referrals and/or scheduling appointments for health, behavioral services, vision or hearing screens, etc.
- Communicating with other agencies regarding services (Family & Children Services, outpatient therapies, etc.)

Coordinating with other health professionals in the school to establish a continuum of health and behavioral services

- Coordinating services with ancillary staff, principals, counselors, personal care aides, etc.

Logging a Case Management Service

Service Record

Student Sample, A

Service Targeted Case Manager

Staff Sample, B

Service Type Targeted Case Management Ser

Service Date Time 11/15/2022 11:30

Group Size 1

Duration Minutes 20

Progress Report Moderate Progress

In your professional opinion, select the progress that fits the service you are providing. If it is "not applicable," choose it from the drop down.

Select the service type that best fits what you are seeing the student for.

Provider Notes

Consulted with Speech Therapist regarding student progress. He continues to need support with articulation and language issues. Will continue to support with modeling and corrections as they occur.

Provider notes must contain enough detail to be able to reconstruct what transpired during your service, e.g. who was present, what was done, next steps. A couple sentences with good details is all you need.

Areas Covered/Assessed:

Coordinate with staff/health prof

(If Other Specify):

(none)

(If Other Specify):

(none)

(If Other Specify):

Areas covered: select one item from the drop down. If nothing fits what you did, selecting "Other" is fine. However, be sure to fill in the field to the right: (If Other Specify)... as in what does "other" mean to you.

Has this service been completed?

Check this box when you are done.

Lastly, click save.

Save

Cancel

A warning will pop up. It means you can edit any service records you have created if it has not been submitted for billing. If it has already been submitted, and you need to change/correct something, reach out to the ISD Medicaid Department for assistance.

Logging IEP Meetings

Service Record

Student Sample, A

Service Targeted Case Management

Staff Sample, B

Service Type IEP/IFSP Participation [T1024 T

Select the service type that best fits what you are seeing the student for.

Service Date Time 10/26/2022 11:30

Date of service is the date of the IFSP/IEP.

Group Size 1

Duration Minutes 60

Progress Report Not Applicable

In your professional opinion, select the progress that fits the service you are providing. If it is "not applicable," choose it from the drop down.



Provider Notes

Conducted an IEP Meeting with the Speech Therapist, CET Team, general education staff, and parents. Student's eligibility for Special Education changed from SLI to ASD. We updated her progress, goals and objectives, and supplementary aides and services in order to develop an IEP that better describes her current needs.

State what your particular role and/or tasks were for this IFSP/IEP, What did you discuss/advise at this meeting? Plan going forward? Does not need to be lengthy, 2-3 sentences with detail.

Areas Covered/Assessed:

Participate in IEP Meeting

(If Other Specify):

Areas covered: select Participate in IEP Meeting

(none)

(If Other Specify):

(none)

(If Other Specify):

Has this service been completed?

Check this box when you are done.

Save

Cancel

Lastly, click save.

A warning will pop up. It means you can edit any service records you have created if it has not been submitted for billing. If it has already been submitted, and you need to change/correct something, reach out to the ISD Medicaid Department for assistance.

Logging a Monthly Summary

Service Record

Student Sample, A

Staff Sample, B

Service Date Time

 

Select a time when school is in session.

Duration Minutes

Duration is not required

Progress Report

In your professional opinion, select the progress the student made for the month.

Provider Notes



New IEP is scheduled for December. Although some progress has been seen, there are skills which will continue to be worked on in order to maintain. Student is showing longer periods of tolerance and will continue to assert himself when he needs to be adjusted or out of a specific piece of equipment. No changes in medical/mental status, no changes in treatment.

Summarize how the student did overall during the month. Include evaluation of progress, changes in medical and mental status, and any changes in treatment with rationale for change.

Service

Service Type

You MUST select "Monthly Progress Summary."

Group Size

Areas Covered/Assessed:

(If Other Specify):

Areas covered: select Monthly Summary.

(If Other Specify):

(If Other Specify):

Has this service been completed?



Check this box when you are done.

Lastly, click save.

A warning will pop up. It means you can edit any service records you have created if it has not been submitted for billing. If it has already been submitted, and you need to change/correct something, reach out to the ISD Medicaid Department for assistance.

Targeted Case Manager: Service Record Examples

Service Captures
Met with behavioral specialist, social worker and other teachers regarding behaviors that student is exhibiting. A behavior plan is being recommended. Parents contacted and informed of situation.
Reviewed IEP goals to determine student's progress in preparation for conferences. Emailed service providers about open progress reports and need to input data for reports.
Spoke to the classroom teachers about student's progress for the first week of school in regard to persisting at tasks and participating in classroom activities. Student continues to require assistance to complete tasks and remain attentive during group activities.
Consulted with social worker and administration to address student's absences recently. There seems to be a transportation issue and the school is working with the parents to alleviate this issue. The current plan is for the school to stress the importance of daily attendance and parents will do their best to assist.
Gathered all the necessary documents needed to complete the REED, met with psychologist & social worker to discuss if student should be reevaluated or if there was sufficient evidence not to reevaluate. The team considered looking into an EI evaluation but after further discussion with the social worker it was determined that he would not qualify and the behaviors are not consistent with an EI qualification.
Assured case records are maintained by opening up student's progress report so other providers can put information in for the end of the marking period coming up on March 20. An e-mail will be sent out to inform service providers that the progress report is open and when the information is due.
Coordinated school based service by meeting with parent and general education teacher at parent/teacher conferences. Went over the student's progress report and answered questions parents may have. As a team we will continue to work with the child to help the child meet their IEP goals and objectives.
In talking with speech pathologist, student continues to have difficulty with vocalic /r/ productions. Student is able to consistently produce /sh/ and /ch/ at the single word level. This objective has been the focus over the last few months given high levels of frustration regarding /r/ production. We will continue to help student with his speech goals.
Consulted with Occupational therapist re: student's fine motor difficulties and how to best support in the classroom. A pencil grip and loop scissors were recommended to help the student be more successful.
Consulted with Speech therapist regarding student progress. He continues to need support with articulation and language issues. Will continue to support with modeling and corrections as they occur.
Contacted the TC in Lakeview to coordinate needed paperwork for student to enroll in school. Mom has had to move and needs assistance with getting all documents to enroll her there. Copied IEP, transcript, psych report, shot record, and discipline files to be taken to Lakeview for enrollment.

Monthly Progress Summary Examples

Include evaluation of progress, changes in medical and mental status, and any changes in treatment with rationale for change.

Student has been doing well this month. She has been having upper respiratory issues and hasn't been feeling well consistently, but she has been participating in circle time and during curriculum. Student has been using simple buttons to make error-less choices and has been using facial expressions and eye gaze to make selections between 2 or 3 choices. Student has also been working with the PT and OT. She has been working well with the staff and seems to show progress with their positioning and stretches. No changes in medical, mental status or treatment plan.

Student has returned to school this year with more language. He is initiating conversation with adults, but very little with his peers. He is using language to get his needs met. He continues to have difficulty persisting at tasks and maintaining attention during group activities. He is not as silly during circle time and appears to be able to sit for longer periods of time in comparison to last school year. Attending circle time for up to four minutes and then an adult intervenes and prompts him. No changes in medical, mental status or treatment plan.

For the month of December, Sam's parents were contacted multiple times to coordinate services that are being provided by Area Mental Health. Also followed up with social worker on techniques that can be used in the classroom to address Sam's behavior issues. No changes in medical, mental status or treatment plan.

Examples of Insufficient Monthly Summaries:

"Continues to progress on IEP goals."

"Coordinated Services."

"Limited progress."

"Services Delivered."

"Made progress on goals."

"Student doing well."

"Some progress towards goals."

"The student is making some progress toward his/her IEP goals and objectives."

"Coordinating and monitoring IEP services on behalf of student."

"Maintenance of Case Records."

Random Moment Time Studies – a Guideline for Designated Case Managers

- The time study gathers information on the activities that school staff provide students and classifies them as educational or related to case management services that could be reimbursed by the Medicaid program.
- Notification is via email from miaop@pcgus.com. For compliance, responses are expected within 24-48 hours.
- It is important that the person who reviews and assigns a code to your answers understands your activity, so please follow these important guidelines.

Using detail and being specific helps to avoid follow-up questions.

Question 1 - Who was with you?

Too Vague	Detailed Response
A student	A student who is severely, multiply impaired
A parent	A parent of a student with autism
A teacher	The SXI classroom teacher
A principal and staff	The principal of our center program for special ed. students, along with the OT, PT and Social Worker

Question 2 – What were you doing?

Too Vague	Detailed Response
Talked with staff	Consulted with the OT concerning the student’s wheelchair needing repair; leg locks are missing internal bolts; front wheel wobbly.
Discussion with parent	Talked to parent about the effects of new medication that I have observed. Student is calmer in the classroom. Parent reporting that behavior is improving at home as well. I will update the school nurse.
Phone call home	Received update from parent after student’s hospital visit. Parent received prescription for new medication and a script for OT and PT services.

Question 3 - Why were you doing this activity

Too Vague	Detailed Response
Wheelchair is shaky	Student is wheelchair bound and personal care providers are having a difficult time moving student. There is difficulty for our transportation staff as well.
Monitoring behavior	Student receives nursing services and medication is monitored at school. The student’s behavior in the classroom is affected by the medication.
Follow up on services	Student is to receive OT and PT services per the IEP. Script needed to begin services at school

Question 4 - Is the service you provided part of the child’s medical plan of care or for which medical necessity has been determined? Options include: (pick one)

- Yes – IEP/IFSP
- Yes – Medical Plan of Care other than an IEP/IFSP (i.e. 504 plan, student health plan, nursing plan, physician’s order, crisis intervention services)
- Medical necessity established in other method
- No, or N/A

Question 5 - Are you this student’s Designated Case Manager?

For students on your caseload who have an ancillary service on their IEP (even those over age 21) the answer is **YES**. The student does not need to be Medicaid eligible for you to answer yes to this question.

Random Moment Time Study AT • A • GLANCE

Frequently Asked Questions: RMTS

What is the Random Moment Time Study (RMTS)?

The RMTS is the federally accepted method of documenting the amount of staff time spent on direct service and administrative outreach activities.

What is the purpose of the RMTS?

The RMTS is a program requirement that helps schools receive federal reimbursement for time spent on allowable related activities.

What is my role in the RMTS?

Your role is to respond to all moments you have been selected for in a timely manner.

How did I get selected to complete an RMTS survey?

Your district's RMTS coordinator identified you as a person who performs activities related to Medicaid and health-related services as part of your job.

How many RMTS surveys will I get?

It varies, but people typically receive 0-5 surveys per quarter.

How long does it take to complete an RMTS survey?

The survey is five questions and can usually be completed in less than five minutes.

How should I respond to the RMTS survey questions?

- Provide truthful and thorough responses. There are no wrong answers, but remember to answer completely and accurately. Do not include student names.
- The survey is asking about one minute in time. When answering your RMTS survey, provide specific information about that sixty second period.

Tips for specific situations:

IF YOU WERE...	TELL US...
In an IEP meeting	What was the single topic of discussion at your assigned RMTS time?
Conducting an assessment	What type of assessment were you conducting?
Discussing a student	What was the single topic of discussion at your assigned RMTS time?
On a prep period	What were you preparing at the time of your moment?
Completing an IEP	What specific part of the IEP was being worked on at the time of your moment?
Working on an IEP goal	What specific goal was being worked on at the time of your moment?
Working on email	What was the content of the specific email you were reading or writing?
Driving to next location	What was the first task completed upon arriving at your next location?
Completing multiple tasks	What one specific task was being completed at the exact time of your moment?
At a conference/training/PD	What was the topic of discussion at the time of your moment?

Final Tips:

- When responding to the "why" question, think about the intended outcome of the activity you were doing.
- You should not drop everything to complete your RMTS survey. However, you should complete it as soon as possible after the moment passes. Ideally, complete the RMTS survey before leaving work for the day.
- If you are absent, not scheduled, or leaving work before your moment occurs, complete it the next day.
- If you are not working with a student at the time of your moment, that is fine. You should still complete the moment and respond with the activity you were doing at that date and time.