

## Medicaid School Based Services – Guidelines for Billing Evaluations (v7.16.16)

### What is Billable as an Evaluation?

An evaluation includes assessments, evaluations, tests, and all related activities performed to determine if an individual is eligible under the provisions of IDEA 2004 and necessary to develop the student's individual education program (IEP).

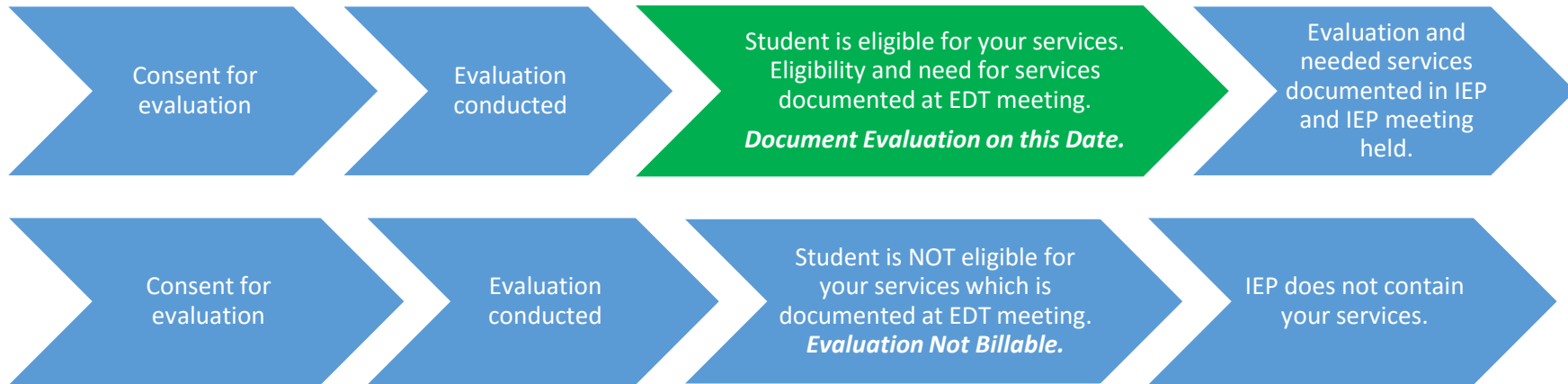
Evaluations for Medicaid School Based Services may be billable for students with IEPs when:

- The evaluation is performed as part of the initial IDEA eligibility and the student is found eligible for the specific related service,
- The evaluation is performed as part of the IDEA re-evaluation process and the student is found eligible or not eligible for the specific related service, and/or
- At any time assessment information is needed in initiating, developing, reviewing or revising a student's IEP plan.

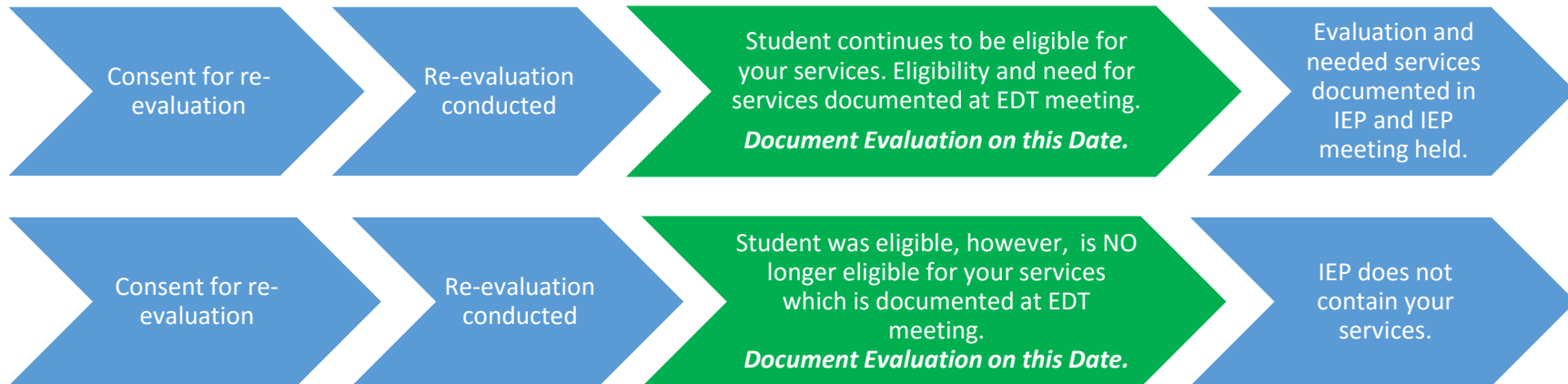
### When Do I Document my Evaluation?

- Document a completed evaluation (using the appropriate billing code) in Service Capture on the *date of eligibility determination for special education*, if your services become part of the student's IEP (initial) or is currently part of the student's IEP (re-evaluation).
- Document a completed evaluation (using the appropriate billing code) in Service Capture on the *date of the IEP, if an evaluation was needed to determine services as part of the annual IEP development*. The evaluation results need to be documented, summarized, and/or linked in the Present Levels of Academic and Functional Performance, Annual Measurable Goals, and Schedule of Services. Possible scenarios include:

## Initial Evaluations



## Re-Evaluations



## Evaluation as Part of IEP Development



## What Codes Do I Use for Evaluations and Re-Evaluations?

For all **initial evaluations**, use the appropriate code listed below that corresponds to your discipline and the evaluation that you completed to determine eligibility.

Service Provider Description	Procedure Code	Description
Audiologist	92557	Comprehensive Audiometry Threshold Eval and Speech Recognition
Audiologist	92567	Tympanometry (Impedance Testing)
Audiologist	92588	Distortion Evoked Otoacoustic Emission, Comprehensive Evaluation (min 12 frequencies) with Interpretation and Report
Occupational Therapist	97003	OT Evaluation
Physical Therapist	97001	PT Evaluation
Social Worker - LISW	90791	Psychiatric Diagnostic Evaluation
Speech Therapist	92521	Evaluation of Speech Fluency (e.g., stuttering, cluttering)
Speech Therapist	92522	Evaluation of Speech Sound Production (e.g., articulation, phonological process, apraxia, dysarthria)
Speech Therapist	92523	Evaluation of Speech Sound Production; with Evaluation of Language Comprehension and Expression) e.g., receptive and expressive language)
Speech Therapist	92524	Behavioral and Qualitative Analysis of Voice and Resonance

For all **re-evaluations**, including evaluations necessary to determine appropriate services as part of the IEP annual review process, use the codes listed above, except for OT and PT. For OT and PT, the appropriate codes for re-evaluations are as follows:

Service Provider Description	Procedure Code	Description
Occupational Therapist	97004	OT Re-Evaluation
Physical Therapist	97002	PT Re-Evaluation

### How Do I Document the Evaluation/Re-Evaluations in Service Capture?

#### Example Entry in Service Capture – Initial Evaluation and Student is Eligible for Your Services

#### Testing Date #1

### Service Record

**Student** Lilly Sample

**Student SASID** 123123123

**Birth Date** 09/06/2004

**District** Sample Schools

**Regional Group** High Plains REC #3

<b>Service</b>	Occupational Therapy
<b>Related Service Type</b>	Other
<b>Session Size</b>	1
<b>Diagnosis Code</b>	
<b>Other Diagnosis Code</b>	3159
<b>Service Date Time</b>	08/26/2014, 12:00 PM
<b>Duration Minutes</b>	60
<b>Goals And Objectives</b>	N/A
<b>Outcome And Progress</b>	N/A
<b>Activity/Service Intervention and Comments</b>	S: Lilly is being evaluated to determine eligibility under IDEA. She was cooperative throughout the testing. O: Completed TVPS and TVMS. A: Will score protocols and analyze scores to determine possible needs and skill deficits, as well as strengths. P: Continue to complete the evaluation/assessments.
<b>Completed</b>	*System should not let you mark complete, as this is an initial and the student does not currently have an IEP with these services. Leave marked incomplete.

Testing Date #2

**Service Record**

Student Lilly Sample  
 Student SASID 123123123  
 Birth Date 09/06/2004  
 District Sample Schools  
 Regional Group High Plains REC #3

<b>Service</b>	Occupational Therapy
<b>Related Service Type</b>	Other
<b>Session Size</b>	1
<b>Diagnosis Code</b>	
<b>Other Diagnosis Code</b>	3159
<b>Service Date Time</b>	09/02/2014, 12:00 PM
<b>Duration Minutes</b>	60
<b>Goals And Objectives</b>	N/A
<b>Outcome And Progress</b>	N/A
<b>Activity/Service Intervention and Comments</b>	S: Lilly worked well during this evaluation time. She was cooperative. Completed the evaluation. O: Completed the administration of The Test of Handwriting Skills. A: Will score protocol, analyze results, and complete report. P: Lilly earned scores that are significantly below grade level. These skills deficits are impacting her educational performance and achievement. IEP/EDT will be held on October 1, 2014.
<b>Completed</b>	*System should not let you mark complete, as this is an initial and the student does not currently have an IEP with these services. Leave marked incomplete.

## Service Record

**Student** Lilly Sample  
**Student SASID** 123123123  
**Birth Date** 09/06/2004  
**District** Sample Schools  
**Regional Group** High Plains REC #3

<b>Provider Type</b>	Occupational Therapist
<b>License Type</b>	OT
<b>Service</b>	Occupational Therapy
<b>Related Service Type</b>	OT Initial Evaluation [97003]
<b>Session Size</b>	1
<b>Diagnosis Code</b>	3159
<b>Service Date Time</b>	10/01/2014, 01:00 PM**
<b>Duration Minutes</b>	90
<b>Goals And Objectives</b>	N/A
<b>Outcome And Progress</b>	N/A
<b>Activity/Service Intervention and Comments</b>	<p>S: Lilly's EDT/IEP was held today.</p> <p>O: Lilly's evaluation was completed and report written. The final testing was completed on 9/2/14. The EDT determined that Lilly is eligible and in need of for Special Education services under the eligibility category of Specific Learning Disability. The team agreed that based on her scores, Lilly needs occupational therapy to access the general education curriculum and make appropriate progress. These services are considered educationally and medically necessary.</p> <p>A: A PLAAFP and OT goals and objectives were written and added to the IEP to meet Lilly's needs.</p> <p>P: Begin therapy targeting IEP goals and objectives. Monitor progress on a regular basis.</p>
<b>Completed</b>	System should allow you to mark complete, as services may begin on the date of the EDT/IEP.

\*\* Notes: Include the actual time spent in the EDT/IEP as begin and end time.

### **Can I Bill for an Initial Evaluation if the Student is Determined Not to be Eligible for Services?**

**No.** You can only bill for an initial evaluation if the student is found eligible for the medically relevant related service and it is documented in the eligibility determination form and the IEP.

- Document all testing completed and the EDT/IEP meeting.
- In Service Capture on the day of the meeting mark:
  - **Other Related Service Type:** “Other”
  - **Completed:** “No”

### **Can I Bill for an Evaluation as Part of the Re-Evaluation Process if the Student is Determined to No Longer be Eligible and/or In Need of Services?**

**Yes.** Due to the fact that, at the time of the evaluation, the student has an IEP with your services documented, you would bill for this evaluation and document the evaluation (see “Entry in Service Capture – Initial Evaluation and Student is Eligible for Your Services” above).

### **How do I Document my Evaluation in the IEP?**

Evaluation and assessment data must be documented in the Present Level of Academic and Functional Performance including the date the evaluation was completed and a summary of the results that documents the need for your services.

### **What Behavior Health Services are Billable as an Evaluation?**

When an EDT or IEP team determines that a student needs behavior health services provided by a social worker or psychologist, the behavior health provider will conduct an evaluation. When the IEP team meets and it is determined that the student needs behavior health services and these services are included in the IEP, then the evaluation is billable.

If the IEP team determines that the behaviors of concern do not have an educational impact and that behavior health services do not need to be added to the IEP, then the evaluation is not billable.

### **What is the Process for Billing for an Evaluation if I am a COTA or PTA?**

If the COTA/PTA is assisting in conducting an evaluation or re-evaluation under the direct supervision of her/his supervisor and as described above, the COTA/PTA will provide all data, scores, and protocols to the supervisor. The supervisor will score, interpret, and write up the report, as well as sign it and finalize the report within TIENET. The documentation of the assessments performed by the COTA/PTA will be included in the COTA/PTA’s Service Capture log, which is then approved by the supervising OT/PT. Final billing of the evaluation or re-evaluation is then documented in the OT/PT’s Service Capture log (including the billing code) and marked as complete.