

Targeted Case Management (Teacher) Tip Sheet

ONE "Case Management Encounter [T-2023]" and ONE "Monthly Progress Summary"

- You must be the student's Case Manager (the person responsible for the student's IEP or IFSP) to log for TCM services.
- There may be only ONE Case Manager per student.
- The student's IEP/IFSP must contain at least one DIRECT health-related service. These services include: Psychology, services include: Social Work, OT, PT, Nursing, Speech, Audiology, Orientation&Mobility or Personal Care.
- You may not log for the Initial MET or IEP. TCM services start AFTER the student is certified as Special Education. - Services may be billed only **ONE** time per month, with the service dated sometime during the last week (that school was in-session) of each month.

Procedure Code	Targeted Case Management
T2023	<p>SERVICE TYPE: Case Management Encounter: ONE per month, per eligible student</p> <p>Provider Notes: <i>CANNOT be related to curriculum</i></p> <p>You may want to use one or more of the BOLDED statements listed below that best describes the service you provided:</p> <ul style="list-style-type: none"> - 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: <ul style="list-style-type: none"> • coordinating transition planning meetings, • contacting service providers regarding student's IEP 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, and helping families maintain contact with staff and outside providers. Examples include: <ul style="list-style-type: none"> • 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. Examples include: <ul style="list-style-type: none"> • Discussing student progress with service providers • Reviewing IEP to ensure services are being provided as specified • Reviewing IEP to determine progress in goal areas • Setting up therapy schedule for student (OT, PT, speech, social work, etc) - Assuring that case records are maintained and indicate all contacts with, or on behalf of, the student. Examples include: <ul style="list-style-type: none"> • Reviewing, organizing and updating student files / CA-60s • Updating and collecting student health forms, updating student contact info • Reviewing psychology reports • Track/record student progress towards IEP goals/objectives - Coordinating school based services and treatment with parents and the child. Examples include: <ul style="list-style-type: none"> • 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 - Monitoring and recommending a plan of action. Examples include: <ul style="list-style-type: none"> • Coordinating behavior intervention meetings with team members • Making necessary arrangements or adjustments if there are any changes in the needs or status of student - Coordinating the performance of evaluations, assessments and other services that the student needs. Examples include: <ul style="list-style-type: none"> • Coordinating and scheduling REED / MET • Notifying participants of meetings (e-mail, letters, phone calls) • Gathering documents necessary for assessment or referrals - Facilitating and participating in the development, review, modification and evaluation of the IEP/IFSP or Manifestation Review meeting. Examples include: <ul style="list-style-type: none"> • Scheduling IEP / IFSP, sending out invites, attending IEP / IFSP • Gathering documents necessary for IEP / IFSP • Completing amendment to authorize personal care services - Activities that support linking and coordinating needed health services for the student. - Summarizing provider, parent and student consultation. - Coordinating with staff/health professionals to establish a continuum of health and behavioral services in the school setting. Examples include: <ul style="list-style-type: none"> • Coordinating services with principals, counselors, Personal Care Aides.

	<p>Areas Covered/Assessed (Three drop-downs available in PowerSchool Special Education):</p> <p>From the drop-down, select one or more of the statements listed below that best describes the service you provided:</p> <ul style="list-style-type: none"> - Assure re-eval & follow-up are conducted periodically. - Assist Families in Identifying/Maintaining contact with providers; scheduling appts. - Maintenance of student records. - Coordinated services with student & parent. - Monitor & recommend plan of action. - Coordinate evals/assessments/services. - Coordinate health services for student. - Provide summary of health/behavioral consultation. - Coordinate with staff/health professionals to establish continuum of services in school setting.
Monthly Progress Summary	<p>SERVICE TYPE: Monthly Progress Summary: ONE per month, per eligible student</p> <p>MONTHLY SUMMARY PROGRESS NOTE EXAMPLE:</p> <p>10/9/13 - Reviewed progress report for advancement toward speech & social work goals and sent to parents. 10/14/13 - Discussed student progress with Speech Path. 10/26/13 - Followed up on evals and invited parents and staff to 3 Year Re-Eval MET & IEP. 10/29/13 -Facilitated and participated in the IEPT meeting. 10/30/13 - Discussed IEP with school principal and arranged for classroom accommodations for the student, who is physically impaired.</p>
	RECORD-KEEPING ONLY - Non-billable services
Communication	<p>Choose any of the procedure codes at the left from your drop-down box if you wish to create a log for record-keeping purposes only. For example:</p> <ul style="list-style-type: none"> - A service was rendered that was not billable (could not be classified under one of the notes listed above.) - Services were not rendered because a key participant was absent or not available. - You wish to make a record-keeping only entry into the system. <p>Records created using any of the codes at the left <u>will not be billed</u>.</p> <p>DO NOT use any of the codes at the left if you are intending to log your Case Management Encounter or Monthly Progress Summary.</p>
Consultation	
No School Day	
Other	
Provider Absent	
Provider Not Available	
Student Absent	
Student Not Available	

Staff Qualifications:

- A baccalaureate degree with a major in a specific special education area, or
- Has earned credit in course work equivalent to that required for a major in a specific special education area, or
- Has a minimum of three years personal experience in the direct care of an individual with special needs.

To record TCM Services, you must complete the following fields in the Service Record:

- Service Date & Time: Should be a day sometime during the last week of the month (when school was in session.)
- Duration Minutes: Record a duration that reflects how long it took you to write your case management note.
Example: Provider sat down at 3:15 pm and finished the note at 3:30 pm, thus, the duration is 15.
- Progress Report: Select from the drop-down, you student's overall progress in the classroom for the month. **DO NOT USE "NOT APPLICABLE"**
- Service Targeted Case Manager
- Service Type: Case Management Encounter is a "per month" service, so you may record this service just one time per month, per student. Please use a day sometime during the last week (when school

was in-session) of the month.

If your service relates to a DIRECT "medical" service that is listed on the Programs and Services section of the student's ACTIVE IEP/IFSP, select "Case Management Encounters" from the service type drop-down.

- Group Size
1
- Provider Notes
Enter a provider note that details case management **health-related** type activities you did through the month(note SHOULD NOT be related to curriculum.) See NOTE EXAMPLE above with procedure code T2023.
- Areas Covered/Assessed
From the Drop-down, select one or more of the statements listed that describes the service(s) you provided. (Three drop-downs are available for multiple selections.)
- Check the box "Has this service been completed?"
- Save the record

To record Monthly Progress Summary

- Service Date & Time: Can be on the same day, just change the TIME.
- Service Type: Monthly Progress Summary Group size: 1
- Provider Note: see example above under Monthly Progress Summary
- Areas covered/assessed: Monthly Summary
- Check the box "Has this service been completed?"

To record your attendance at the IEP Meeting (not INITIAL), you must complete the following fields in the Service Record:

- Service Date & Time: This should be the day and time in which the meeting took place.
- Duration Minutes Record how long the meeting took.
- Service Targeted Case Manager