

# 2014-2015 Tip Sheet

## Targeted Case Management (TCM)

### Case Management Guidelines:

- You must be the student's Case Manager (the person responsible for the student's IEP or IFSP) to bill for TCM services.
- There may be only ONE Case Manager per student.
- The student's IEP must contain at least one DIRECT health-related service to address a "medical" disability. These services include: Psychology, 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 style="background-color: #90ee90;"><b>Case Management Encounter: ONE per month, per eligible student</b></p> <p><b>Provider Notes:</b> Health-related in nature (CANNOT be related to curriculum.)</p> <p>You may want to use one or more of the <b>BOLDED</b> statements listed below that best describes the service you provided:</p> <ul style="list-style-type: none"> <li>- <b>Assuring that standard re-examination and follow-up are conducted on a periodic basis to ensure that the student receives needed diagnosis and treatment.</b> Examples include: <ul style="list-style-type: none"> <li>• coordinating transition planning meetings,</li> <li>• contacting service providers regarding student's IEP progress,</li> <li>• coordinating meetings to discuss plan of care progress and all related preparation.</li> </ul> </li> <li>- <b>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.</b> Examples include: <ul style="list-style-type: none"> <li>• Linking parents with providers (providing contact info, scheduling appointments, etc)</li> <li>• Assist families with questions re: providers and available services</li> </ul> </li> <li>- <b>Follow-up to ensure that the student receives needed diagnostic and treatment services.</b> Examples include: <ul style="list-style-type: none"> <li>• Discussing student progress with service providers</li> <li>• Reviewing IEP to ensure services are being provided as specified</li> <li>• Reviewing IEP to determine progress in goal areas</li> <li>• Setting up therapy schedule for student (OT, PT, speech, social work, etc)</li> </ul> </li> <li>- <b>Assuring that case records are maintained and indicate all contacts with, or on behalf of, the student.</b> Examples include: <ul style="list-style-type: none"> <li>• Reviewing, organizing and updating student files / CA-60s</li> <li>• Updating and collecting student health forms, updating student contact info</li> <li>• Reviewing psychology reports</li> </ul> </li> <li>- <b>Coordinating school based services and treatment with parents and the child.</b> Examples include: <ul style="list-style-type: none"> <li>• Communicating with student's family about IEP goals / services</li> <li>• Scheduling conference times with parents and service providers</li> <li>• Attending conferences with student's family to review IEP goals</li> </ul> </li> <li>- <b>Monitoring and recommending a plan of action.</b> Examples include: <ul style="list-style-type: none"> <li>• Coordinating behavior intervention meetings with team members</li> <li>• Making necessary arrangements or adjustments if there are any changes in the needs or status of student</li> </ul> </li> <li>- <b>Coordinating the performance of evaluations, assessments and other services that the student needs.</b> Examples include: <ul style="list-style-type: none"> <li>• Coordinating and scheduling REED / MET</li> <li>• Notifying participants of meetings (e-mail, letters, phone calls)</li> <li>• Gathering documents necessary for assessment or referrals</li> </ul> </li> <li>- <b>Facilitating and participating in the development, review, modification and evaluation of the IEP/IFSP or Manifestation Review meeting.</b> Examples include: <ul style="list-style-type: none"> <li>• Scheduling IEP / IFSP, sending out invites, attending IEP / IFSP</li> <li>• Gathering documents necessary for IEP / IFSP</li> <li>• Completing amendment to authorize personal care services</li> </ul> </li> <li>- <b>Activities that support linking and coordinating needed health services for the student.</b></li> <li>- <b>Summarizing provider, parent and student consultation.</b></li> <li>- <b>Coordinating with staff/health professionals to establish a continuum of health and behavioral services in the school setting.</b> Examples include: <ul style="list-style-type: none"> <li>• Coordinating services with principals, counselors, Personal Care Aides.</li> </ul> </li> </ul>

	<p>Areas Covered/Assessed (Three drop-downs available):</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"> <li>- Assure re-eval &amp; follow-up are conducted periodically.</li> <li>- Assist Families in Identifying/Maintaining contact with providers; scheduling appts.</li> <li>- Maintenance of student records.</li> <li>- Coordinated services with student &amp; parent.</li> <li>- Monitor &amp; recommend plan of action.</li> <li>- Coordinate evals/assessments/services.</li> <li>- Coordinate health services for student.</li> <li>- Provide summary of health/behavioral consultation.</li> <li>- Coordinate with staff/health professionals to establish continuum of services in school setting.</li> </ul>
<p>Monthly Progress Summary</p>	<p><b>Monthly Progress Summary: ONE per month, per eligible student</b></p> <p>MONTHLY SUMMARY PROGRESS NOTE EXAMPLE:</p> <p>10/9/13 - Reviewed progress report for advancement toward speech &amp; 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 &amp; 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>
<b>RECORD-KEEPING ONLY - Non-billable services</b>	
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"> <li>- A service was rendered that was not billable (could not be classified under one of the notes listed above.)</li> <li>- Services were not rendered because a key participant was absent or not available.</li> <li>- You wish to make a record-keeping only entry into the system.</li> </ul> <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.
- 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