School Health And Related Services

Operating Procedures

Special Education Solutions

CONTENTS

SCHOOL HEALTH AND RELATED SERVICES (SHARS)

Special Education or Special Populations Department

Districts may choose to “house” the School Health and Related Services (SHARS) program within the Special Education or Special Populations Department. There is no legal requirement as to which department within the district is the lead contact for the program. An efficient SHARS program will collaborate with several departments to ensure everyone has what is needed.

Roles and Responsibilities

Key roles assigned will include a SHARS Lead Contact and a SHARS Program Supervisor. Depending on the size of the district, this role may be divided or consolidated based on the district and available personnel.

- SHARS Lead Contact – Most questions about SHARS will be funneled to this contact. This contact should have a good understanding of the SHARS programs and the SHARS Policies. As updates to SHARS policies are made, this person should disseminate the information to all providers. Specific Responsibilities may include:
    - Set up an administrator account in Texas Medicaid & Healthcare Partnership, TMHP (your TASB SES Primary Account Executive can assist)
    - Attend required annual Random Moment Time Student (RMTS), SHARS Cost Report, and Medicaid Administrative Claiming (MAC) training offered through the Health and Human Services Commission (HHSC)
    - Superintendent or Primary financial contact will need to create an account in Fairbanks for your role—RMTS, SHARS Financial Contact, and/or Cost Report Preparer, etc.
    - Develop the quarterly Participant List and certify in Fairbanks

  - Edit/Delete positions on the Participant List as required
  - Remind providers about the Random Moment Time Study (RMTS) and provided required training when selected
  - Set up new providers in the SMART Solutions software
  - Import student data into SMART Solutions
  - Provide staff training on the SHARS program
  - Review and Process SHARS Claims on a timely basis
  - Save Remittance & Status (R&S) and Certification of Funds (COF) reports from TMHP at least monthly
  - Review and submit the quarterly COF statement to TMHP (reconcile SHARS checks received from TMHP to COF statement)
  - Ensure SHARS Cost Report is submitted by April 1st
  - Liaison between TASB Special Education Solutions and the district on SHARS matters

- SHARS Program Supervisor – This person makes the final decisions on issues unable to be addressed by the SHARS Lead Contact. This may include decisions on documentation records, claim submissions, and overall compliance. This person should have a good understanding of the SHARS program and the related policies. Responsibilities may include:
  - Ensure compliance with the SHARS program
  - Provide staff training on the SHARS Program
  - Ensure SHARS Cost Report is submitted by April 1st
  - Liaison between TASB Special Education Solutions and the district on

Provider Set Up

Review all staff providing a SHARS service and include those staff members on the Participant List (PL) in Fairbanks. The PL is a position-control document and may be updated each quarter. Each participant is required to document SHARS services provided within 7 days from the date of service (DOS). Using the staff listed on the PL the SHARS Lead Contact will ensure all staff have access to the SMART Solutions documentation software and any needed training.

- SHARS Lead Contact will attend the District Admin training for SMART Solutions provided by TASB Special Education Solutions
- SHARS Lead Contact will need *District Admin* access in SMART Solutions in order to add providers to the software
- SHARS Lead Contact will need to know the Licensure of all providers (except PCS)
- Depending on the licensure, some providers will need supervisors assigned in order to review and submit SHARS claims (e.g., Speech Language Pathologist Assistant (SLPA), (Certified Occupational Therapy Assistants (COTA), Physical Therapy Assistants (PTAs), etc.)
- It is recommended that a licensed Speech Language Pathologist (SLP) provide a NPI when setting up the account in SMART Solutions
- Maintain the Referring and Prescribing Providers tile in SMART Solutions

Student Information Update

SHARS Lead Contact may use the district's student information system (PEIMS) or special education management system to create a spreadsheet to import bulk student data into SMART Solutions. The import specifications are listed under the Help tab in SMART Solutions.

- It is recommended the SHARS Lead Contact import student information on a consistent basis—monthly, bi-monthly, each grading period, etc. in order to maintain an up-to-date list of students in SMART Solutions. It is possible to manually update students one at a time in the software.

- Districts are encouraged to import IEP data into SMART Solutions monthly. This will keep the student data accurate and assist with the ease of documenting and processing SHARS claims.

- Districts may choose to import student absences into SMART Solutions after each grading period. This is another validation step to ensure no billing is processed on days a student was marked absent.

Training

TASB Special Education Solutions offers training opportunities for members throughout the year.

- At the beginning of the school year a SHARS 101 review training is offered for each provider type—Personal Care Services (PCS), Nursing, Related Services, etc. and includes a training for the Random Moment Time Study (RMTS). In addition, each member has access to the TASB online management system which provides on-demand videos for SHARS providers.

- A Mid-Year training is offered to assist districts with the preparation of the SHARS Cost Report. Timelines and deadlines are provided to ensure that a district that needs assistance is helped in a timely manner prior to the Cost Report deadline of April 1st.

- Each spring TASB Special Education Solutions hosts an annual SHARS Conference. This conference is a time to meet other SHARS contacts across the state, hear the latest in SHARS policies and learn from experts in the SHARS field.

Anytime a district needs a training for a larger group or 1:1, the SHARS Lead contact can reach out to the assigned Primary Account Executive to set up an onsite or virtual training.

Session Documentation

SHARS sessions should be documented within 7 days from the date of service. SHARS Program Supervisor should determine what is acceptable documentation for providers. Providers may document initial session logs in SMART Solutions, paper logs, or providers may document in third-party documentation software. If initial session documentation is in SMART Solutions, sessions should be entered within 7 days from the date of service. If first place of documentation is kept elsewhere, session logs must contain the following information:

- Student’s Name
- Student’s date of birth
- Student’s Medicaid Number
- Date of service
- Billable start and stop time
- Total billable minutes
- Student observation
- Procedure code
- Activity performed
- SHARS provider’s name, title, original signature, or electronic signature

Session notes for therapy should include all elements listed above as well as:

- Student’s progress towards goals
- Note indicating whether the service was provided individually or in a group setting
- The IEP objective

Record Retention: SHARS records must be maintained for seven years. SHARS Program Supervisor should determine where records will be kept.

Supervision: SHARS Lead Contact should assign supervisors in SMART Solutions for licensed SLP interns, a grandfathered SLP, a licensed SLP assistant, an Occupational Therapy Assistant, and a Physical Therapy Assistant.

Session Documentation monitoring: Expectations for session documentation should be clearly defined by SHARS Program Supervisor. SHARS Lead Contact should verify that providers are documenting sessions in SMART Solutions within the time frame specified in the district's operating procedures.

Claim Submissions

SHARS Lead Contact or designee is responsible for verifying required documentation prior to processing claims. When at all possible, utilizing SMART Solutions available validations is helpful.

Required documentation for SHARS services includes:

- Parental Consent (see Parental Consent sections for more information)
- Was the session documented within 7 days from date of service
- Prescriptions and/or Referral (see Prescriptions and Referrals section for more information)
- Individual Education Plan (IEP) – is the procedure listed in the IEP? Does the IEP include the medical necessity, frequency, setting etc.?
- Do the session logs/notes include all required elements (see Session Documentation section for more information)?
- Provider Signature – Is the provider utilizing electronic signature? If not, did the provider print, sign full name next to each session, and submit paper logs to SHARS Lead Contact?
- Attendance – Does the district attendance record match SHARS billing?
- Total Billable minutes – Does total billable minutes match what is indicated in the IEP?
- Providers License – Is the provider's current license on file or available for audit purposes?
- Supervision – If applicable, is documentation verifying supervision on file?
- Participation list – Is provider/position on the district's participant list for the appropriate date range?

If all required documentation is accounted for, the SHARS Lead Contact or designee, may approve claims to be sent to TMHP.

If all required documentation is not accounted for, the SHARS Lead Contact or designee, may return the session to the provider for edits or defer the session. SHARS Lead Contact should track sessions returned for edits to ensure edits are made in a timely manner.

Parental Consent:

Signed Medicaid Parental Consent (PC) must be obtained prior to billing for any SHARS services. SHARS Program Supervisor should decide if parental consent should be requested during Child Find or Annual Admission, Review, Dismissal (ARD) meeting. Operating Procedures should indicate that consent should be informed, targeted and as such only PC for Medicaid eligible students should be signed by parent/guardian after PC is thoroughly explained by district personnel.

After signed PC is secured, district personnel should forward consent to SHARS Lead Contact. SHARS Lead Contact should enter signed PC in SMART Solutions and retain consent for audit purposes.

Prescriptions:

Prescriptions are required for Occupational Therapy and Physical Therapy SHARS sessions. Prescriptions must be updated every 3 years. Prescribing provider must have a NPI and must be enrolled as a Medicaid Provider. Prescriptions should be forward immediately to the SHARS Lead Contact for entry into SMART Solutions as soon as possible. Prescriptions should be retained for audit purposes.

Referrals:

Referrals are required for all Speech and Audiology SHARS services. Referrals must be updated every 3 years. Referring provider must have a NPI and must be enrolled as a Medicaid Provider. SHARS Program Supervisor should determine which SLPs, and Audiologists will become referring providers. Referrals should be forwarded to SHARS Lead Contact. Referrals should be retained for audit purposes.

Finance (Business) Department

Districts may choose to “house” the School Health and Related Services (SHARS) program within the Finance (Business) Department. There is no legal requirement as to which department within the district is the lead contact for the program. An efficient SHARS program will collaborate with several departments to ensure everyone has what is needed.

Roles and Responsibilities

Key roles assigned will include a SHARS Lead Contact and a SHARS Program Supervisor.

Depending on the size of the district, this role may be divided or consolidated based on the district and available personnel

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- Set up an administrator account in TMHP (your TASB SES Primary Account Executive can assist)
- Attend required annual RMTS, SHARS Cost Report, and MAC training offered through the Health and Human Services Commission (HHSC)
- Superintendent or Primary financial contact will need to create an account in Fairbanks for your role—RMTS, SHARS Financial Contact, and/or Cost Report Preparer, etc.
- Develop the quarterly Participant List and certify in Fairbanks
- Edit/Delete positions on the Participant List as required
- Remind providers about the Random Moment Time Study (RMTS) and provided required training when selected
- Review and Process SHARS Claims
- Save R&S and COF reports from TMHP at least monthly
- Review and submit the quarterly Certification of Funds (COF) Statement to TMHP (reconcile SHARS checks received from TMHP to COF statement)
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    - Ensure compliance with the SHARS program
    - Provide staff training on the SHARS Program
    - Ensure SHARS Cost Report is submitted by April 1st
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TASB Special Education Solutions offers training opportunities for members throughout the year.

- At the beginning of the school year a SHARS 101 review training is offered for each provider type—PCS, Nursing, Related Services, etc. and includes a training for the Random Moment Time Study (RMTS). In addition, each member has access to the TASB online management system which provides on-demand videos for SHARS providers.
- A Mid-Year training is offered to assist districts with the preparation of the SHARS Cost Report. Timelines and deadlines are provided to ensure that a district that needs assistance is helped in a timely manner prior to the Cost Report deadline of April 1st.
- Each spring TASB Special Education Solutions hosts an annual SHARS Conference. This conference is a time to meet other SHARS contacts across the state, hear the latest in SHARS policies and learn from experts in the SHARS field.

Anytime a district needs a SHARS training for a larger group or 1:1, the SHARS Lead contact can reach out to the district's Primary Account Executive to set up an onsite or virtual training. New staff assigned as the SHARS Lead Contact should reach out to the district's Primary Account Executive to set up SMART Solutions software access and training.

Session Documentation

SHARS sessions should be documented within 7 days from the date of service. SHARS Program Supervisor should determine what is acceptable documentation for providers. Providers may document initial session logs in SMART Solutions, using paper logs, or providers may document in third-party documentation software. If initial session documentation is in SMART Solutions, sessions should be entered within 7 days from the date of service. If first place of documentation is kept elsewhere, session logs much contain the following information:

- Student's Name
- Student's date of birth
- Student Medicaid Number
- Date of service
- Billable start and stop time
- Total billable minutes
- Student observation
- Procedure code
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Session notes for therapy should include all elements listed above as well as:

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Record Retention: SHARS records must be maintained for seven years. SHARS Program Supervisor should determine where records will be kept.

Supervision: SHARS Lead Contact should assign supervisors in SMART Solutions for licensed SLP interns, a grandfathered SLP, a licensed SLP assistant, an Occupational Therapy Assistant, and a Physical Therapy Assistant.

Session Documentation monitoring: Expectations for session documentation should be clearly defined by SHARS Program Supervisor. SHARS Lead Contact should compare IEP services with session logs/notes documented in SMART Solutions. If sessions are not being entered in a timely manner next steps should be taken accordingly.

Claim Submission

SHARS Lead Contact or designee is responsible for verifying required documentation prior to processing claims. When at all possible, utilizing SMART Solutions available validations is helpful.

Required documentation for SHARS services includes:

- Parental Consent (see Parental Consent sections for more information)
- Was the session documented within 7 days from date of service
- Prescriptions and/or Referral (see Prescriptions and Referrals section for more information)
- IEP – is the procedure listed in the IEP? Does the IEP include the medical necessity, frequency, setting etc.?
- Do the session logs/notes include all required elements (see Session Documentation section for more information)?
- Provider Signature – Is the provider utilizing electronic signature? If not did the provider print, sign full name next to each session, and submit paper logs to SHARS Lead Contact?
- Attendance – Does the district attendance record match SHARS billing?
- Total Billable minutes – Does total billable minutes match what is indicated in the IEP?
- Providers License – Is the provider’s current license on file or available for audit purposes?
- Supervision – If applicable, is documentation verifying supervision on file?

- Participation list – Is provider/position on the district's participant list for the appropriate date range?

If all required documentation is accounted for, the SHARS Lead Contact or designee, may approve claims to be sent to TMHP.

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After signed PC is secured, district personnel should forward consent to SHARS Lead Contact. SHARS Lead Contact should enter signed PC in SMART Solutions and retain consent for audit purposes.

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Prescriptions are required for Occupational Therapy and Physical Therapy SHARS sessions. Prescriptions must be updated every 3 years. Prescribing provider must have a NPI and must be enrolled as a Medicaid Provider. Prescriptions should be forward immediately to the SHARS Lead Contact for entry into SMART Solutions as soon as possible. Prescriptions should be retained for audit purposes.

Referrals:

Referrals are required for all Speech and Audiology SHARS services. Referrals must be updated every 3 years. Referring provider must have a NPI and must be enrolled as a Medicaid Provider. SHARS Program Supervisor should determine which SLPs, and Audiologists will become referring providers. Referrals should be forwarded to SHARS Lead Contact. Referrals should be retained for audit purposes.

Transportation Department

Specialized transportation is a reimbursable SHARS service when combined with another eligible SHARS service provided on the same day. The transportation staff play a key role in documenting services of transportation and personal care services (PCS) as listed in a student's IEP. The SHARS Program requires each transportation log to contain the following: district name; student's full name and ID, plus Medicaid #, when applicable; the bus route name/number; a clear method to identify AM/PM trips; a clear method to verify the attendance of the driver and service provider each day; a clear method to indicate a student's absence on any given day or part of day; and the providers' signatures and date when the log is complete.

Roles and Responsibilities

There are two roles for the documentation of specialized transportation for students in the SHARS program

- Bus Monitors (aides) – provide PCS to students on the bus for safety, health, supervision, or other activities. This support must be documented in the student's IEP. The bus monitor will maintain a daily log to document services provided and student absences. If using a paper log, the bus monitor must initial each time PCS is provided to the eligible student and include the type of PCS provided. The completed log must be signed and dated before submitting to the SHARS Lead Contact for the processing of reimbursements.

- Bus Drivers – provide the transportation trip for students. Each trip provided to the eligible student must be documented on a daily basis. If using a paper log, the bus driver must initial each time a trip is provided to the eligible student. The completed log must be signed and dated before submitting to the SHARS Lead Contact for the processing of reimbursements.

Training

SHARS Lead Contact should coordinate training for bus drivers and bus monitors (aides) at the beginning of year required trainings and during mid-year orientation. New bus drivers and monitors (aides) should be trained as needed.

Session Documentation

Bus Driver:

Transportation trips should be documented on transportation log for each trip provided. Transportation logs may be a weekly log or monthly log. Bus driver should initial transportation log in the corresponding date and time space to verify driver attendance. If student is absent for a particular trip, driver should indicate absence with an “A” in the corresponding space. At the conclusion of each transportation log, driver should include printed name, signature, title, and date of signature.

PCS on bus:

PCS on bus should be documented for each trip provided. Session logs may be a weekly log or a monthly log. Bus monitor (aide) should initial log in the corresponding date and time space to verify monitor (aide) attendance. If student is absent for a particular trip, monitor (aide) should denote absence with an “A” in the corresponding space. Session log should include observation and PCS provided in addition to session log elements. At the conclusion of each transportation log, bus monitor (aide) should include printed name, signature, title, and date of signature.

Claim Submission

SHARS Lead Contact should coordinate with transportation department to receive transportation logs at the end of each month.

SHARS Lead Contact should verify:

- The IEP clearly indicates an adaptation and/or PCS are needed on the bus.
- Transportation logs include all required elements for billing.

SHARS Lead Contact should enter transportation trips and/or PCS on bus that qualify in SMART Solutions and retain logs for audit purposes. Logs will be required for Cost report documentation.

Resources:

[Texas Medicaid Provider Procedures Manual | TMHP]

[School Health and Related Services | Texas Education Agency]

[School Health and Related Services (SHARS) | Provider Finance Department (texas.gov)]

[Special Education Solutions (tasb.org)]