



SHARS Matters Webinar Series

May 2023 – Documentation Requirements & Best Practices

Presented by Dario Avila, TASB Special Education Solutions



Special Education Solutions

This information is provided for educational purposes only to facilitate a general understanding of the law or other regulatory matter. This information is neither an exhaustive treatment on the subject nor is this intended to substitute for the advice of an attorney or other professional advisor. Consult with your attorney or professional advisor to apply these principles to specific fact situations.

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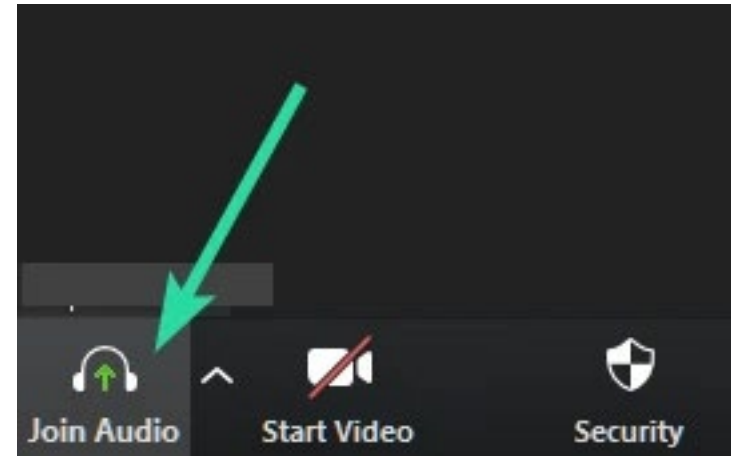
Housekeeping Items

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Housekeeping Items

- Audio options
 - Phone Audio
 - Computer Audio
- Got questions?
 - Submit questions through the Zoom Chat window or by email to shars@tasb.org.



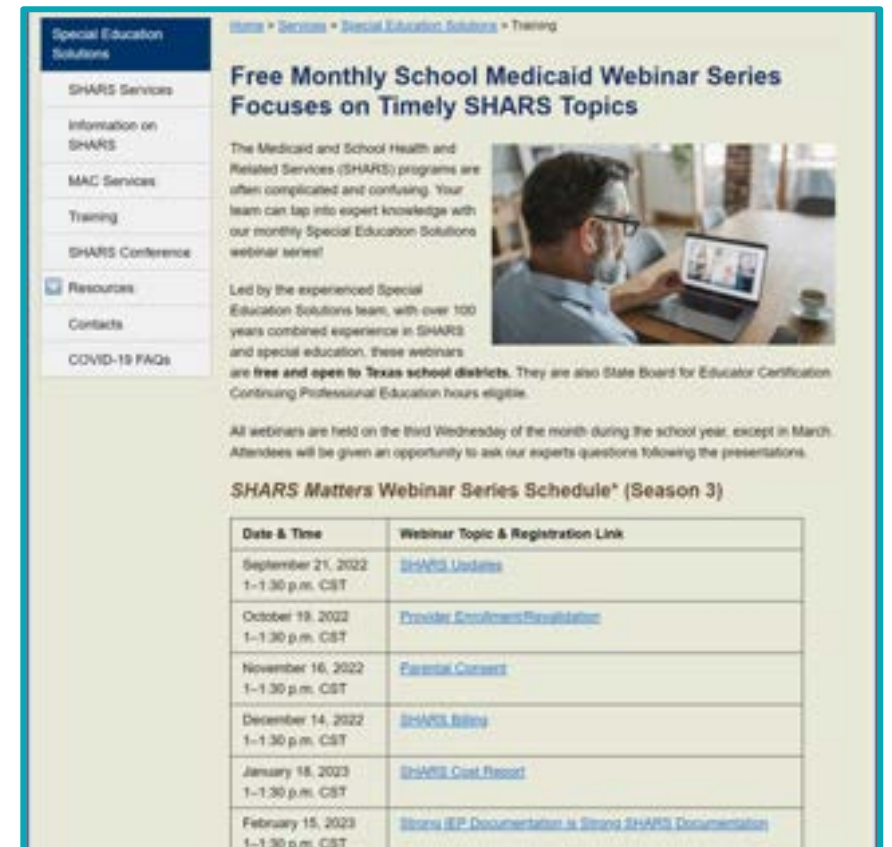


Housekeeping Items

- Need SBEC Credit?
 - Download certificate from the Chat window.
- Download today's presentation from the Chat window

Housekeeping Items

- Session being recorded
- All *SHARS Matters* webinars are available for download from the [TASB Special Education Solutions Training page](#).



The screenshot shows a webpage titled "Free Monthly School Medicaid Webinar Series Focuses on Timely SHARS Topics". The page includes a navigation menu on the left with options like "SHARS Services", "Information on SHARS", "MAC Services", "Training", "SHARS Conference", "Resources", "Contacts", and "COVID-19 FAQs". The main content area features an introductory paragraph about the complexity of Medicaid and School Health and Related Services (SHARS) programs, followed by a photo of a man in a light blue shirt looking at a laptop displaying a webinar. Below the photo, it states that the webinars are free and open to Texas school districts and are also eligible for State Board for Educator Certification Continuing Professional Education hours. A section titled "SHARS Matters Webinar Series Schedule* (Season 3)" contains a table with the following data:

Date & Time	Webinar Topic & Registration Link
September 21, 2022 1-1:30 p.m. CST	SHARS Updates
October 19, 2022 1-1:30 p.m. CST	Provider Enrollment/Revalidation
November 16, 2022 1-1:30 p.m. CST	Parental Consent
December 14, 2022 1-1:30 p.m. CST	SHARS Billing
January 18, 2023 1-1:30 p.m. CST	SHARS Cost Report
February 15, 2023 1-1:30 p.m. CST	Strong IEP Documentation & Strong SHARS Documentation



TASB Special Education Solutions Team



Dario Avila



Carrie Pawloski



Dr. Karlyn Keller



Tricia Gray



Denise Carter



Dr. Ehrikka Hodge



Laurie Woodel



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Agenda

- General SHARS Documentation Information
- Minimum Documents to Collect & Maintain
- Service Logs
- Session Notes
- Trip Logs
- Best Practices
- Questions / Reminders / Contact Info

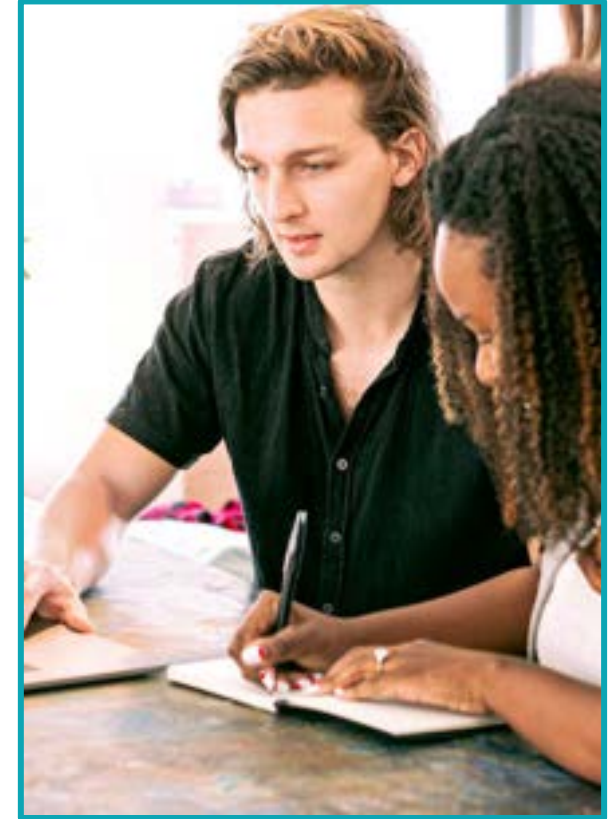
General SHARS Documentation Information

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General SHARS Documentation Information

- All SHARS services require some form of documentation to support the medical necessity of the service delivered.
- All documentation must be legible, dated, and signed by the performing provider.
- Each page of medical record documents must include the student's name and Medicaid number
- SHARS records must be retained for seven years.
- Services must be documented within 1 week (7 days) of delivery



Minimum Documents to Collect & Maintain

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Minimum Documents to Collect & Maintain

- Signed parental consent
- [IEP](#)
- Current provider qualifications (if applicable)
- Prescriptions & referrals
- Medical necessity documentation
- Signed session notes / service logs
- Supervision logs
- Special transportation (trip) logs
- Claims submittal & payment histories
- Assessments / evaluations
- Written agreements for contracted services
- Copies of completed COF letters with supporting information
- E-signature authorization forms (if applicable)
- Shared service arrangement / cooperative agreement



Service Logs

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Service Logs

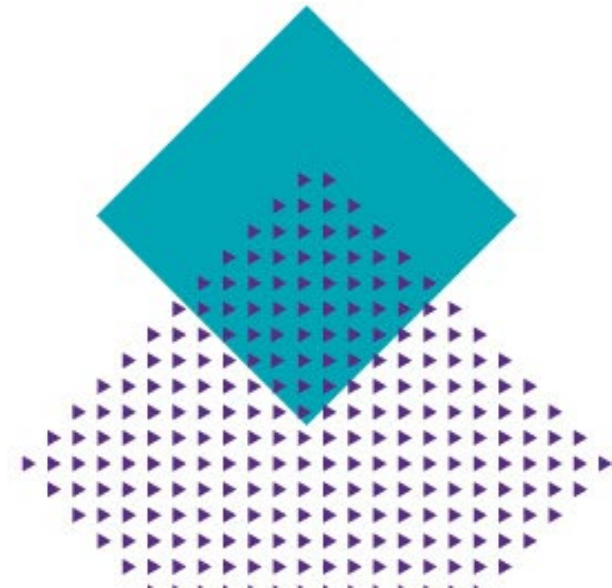
- Required for all SHARS services prescribed in a student's IEP
- Must include:
 - Student's name and date of birth
 - Student's Medicaid number (on every page)
 - Performing provider's printed name, title, and signature (handwritten or electronic)



Service Logs



- Must include (continued):
 - Date of service; and for each date of service:
 - Billable start and stop time
 - Total billable minutes
 - Student observation
 - Procedure code(s)
 - Note of activity performed



Session Notes

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Session Notes

- Required for all therapies
- Include all elements of a service log plus:
 - Student's progress towards goals (if applicable)
 - Note whether the service was provided individually or in a group setting
 - The related IEP objective

Session Notes

- Not required for evaluations
 - Evaluation documentation requirements include:
 - Billable start and stop time
 - Total billable minutes
 - Note of activity performed
 - Service providers are expected to perform and document evaluations in accordance with their discipline-specific standards of practice.

Trip Logs

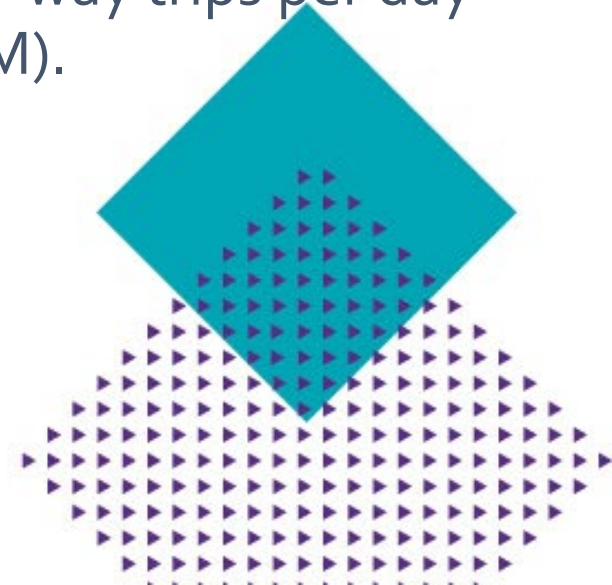
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Trip Logs



- Documentation of each one-way trip must be maintained
- Should be recorded daily
- Must include the number of one-way trips per day and the time of the trip (AM / PM).





Trip Logs

At minimum, trip logs should include the following:

- District name
- Route name or number
- Bus driver's name
- Student's name and Medicaid number
- Dates of service & date of the week
- Student should be marked absent if service was not provided
- Indication if a bus aid/monitor was needed
- Bus aid/monitor name and initials (if applicable)
- Type of personal care service provided and modality (if applicable)
- Dated signature of the bus driver and aid/monitor (if applicable)



Best Practices

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Best Practices

- Establish operating procedures
- Conduct self-audits periodically
- Summer folder review project
- Dedicate a staff member to obtaining parental consent
- Establish incentives



Questions / Reminders / Contact Info

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Get the latest School Health and Related Services (SHARS) news and trends!

Sign up at tasb.org/specialeducation.



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September 2020

SHARS Amidst COVID-19

All of us have been impacted by the COVID-19 pandemic in some way, shape, or form. Even the School Health and Related Services (SHARS) program has been temporarily modified to accommodate for the changes school districts have had to implement to ensure the health and safety of their students and communities. Throughout the ongoing global pandemic, we have remained in constant contact with state and federal agencies to stay informed of all the latest



SHARS Matters quarterly e-newsletter



Free Monthly School Medicaid Webinar Series

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Contact Information



Website

www.TASB.org/specialeducation



Email

shars@tasb.org



Phone

888.630.6606



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Thank You!

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