

Audit Preparation Checklist

For the Montana Medicaid School-Based Services Program, school districts and cooperatives retain responsibility for ensuring that program requirements are met. Schools may not be in compliance if any statement below is checked “No.”

Service Provider Qualifications			
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Do all individual service providers meet the established provider qualifications for the Montana Medicaid School-Based Services Program for their discipline?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Is there documentation that the service providers are credentialed?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Do you verify and maintain contractor provider credentials?
Services Indicated on IEP			
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Is the service that is being billed included in the IEP?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Does the IEP document services that are necessary and being provided as part of the school-based health services program?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Does a team that includes school personnel and qualified providers of health services develop all IEPs?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Does the IEP confirm that services are authorized as medically necessary as certified by a practitioner of the healing arts within their scope of practice?
Service Documentation			
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Is the billing documentation accurate for services performed (including student name, date of service, duration of service, type of service and notes that show progress toward student goals)?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Are all service documentation records regularly maintained by the service provider on the day that services are provided?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Are all service documentation records available at a central district location during an audit?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Is evaluation reimbursement only requested for health related evaluations that are completed to determine if a student requires special education services?
Special Needs Transportation Services			
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Are special transportation services listed on the IEP?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Did the student receive Medicaid reimbursable services on the same day that transportation reimbursement is being requested?
Billing Information			
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Is third party insurance pursued for students with dual insurance coverage?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Do you have documentation retained for a period of six years and three months from the date of service?
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Do you have a process in place to maintain contracted providers' service documentation?