

## CHECKLIST FOR A MEDICAID-COMPLIANT WRITTEN ORDER

<u>What should I be checking?</u>		
<ul style="list-style-type: none"> <li>✓ <i>Handwriting should be legible for all eight required elements.</i></li> <li>✓ <i>Scanned documents should be checked to ensure that all content was scanned and the image is clear/readable.</i></li> <li>✓ <i>Corrections must be crossed out and initialed. White out is not permissible on Medicaid documentation.</i></li> <li>✓ <i>Check for any missing information – (Items left blank.) <b>OR</b>, Make sure a stamp is not covering other pertinent information.</i></li> </ul>		
(8) Required Elements	Medicaid Compliant (Valid)	Non-Medicaid Compliant (Invalid)
<b>1. CHILD’S NAME</b>	<ul style="list-style-type: none"> <li>• Child’s First &amp; Last Name (<i>spelled correctly</i>)</li> </ul>	<ul style="list-style-type: none"> <li>• No Name</li> <li>• Name spelled incorrectly</li> <li>• Only first name (or only last name)</li> <li>• Name of another child</li> <li>• Incorrect date of birth</li> </ul>
<b>2. TERM OF SERVICE</b>	<p style="text-align: center;"><u>Preferred format for expressing dates - (MM/DD/YY)</u></p> <ul style="list-style-type: none"> <li>• July 1, 2018 – June 30, 2019</li> <li>• 7/1/18 – 6/30/19</li> <li>• 7/1/2018 – 6/30/2019</li> </ul>	<p style="text-align: center;"><u>Incomplete Dates:</u></p> <ul style="list-style-type: none"> <li>• 2018 – 2019 or 18/19</li> <li>• 9/2018 – 6/2019</li> <li>• July 2018 – June 2019</li> <li>• No “Term of Service” listed on the order</li> </ul>
<b>3. SERVICE(S) BEING ORDERED Frequency &amp; Duration of Service</b>  <i>(The service (OT/PT/ST) should Be listed on the order along with <b>ONE</b> of the following options – <b>NOT BOTH.</b>)</i>	<p><b>Option 1:</b>* Specific reference to adopt the frequency and duration “as per the IEP.” <i>(If this option is used, the frequency/duration should <b>not</b> be delineated on the order.)</i> * Using this option is “best practice” and will reduce the chance of potential issues. <b>–OR–</b></p> <p><b>Option 2:</b> Actual Frequency and Duration of Service</p> <ul style="list-style-type: none"> <li>• Frequency and duration “As per the IEP” <b>–OR–</b> Speech 2x30 (I) - Speech 1x30 (G)</li> <li>• If the frequency/duration is specified on the order, it should match the frequency/duration listed on the IEP. If the frequency/duration is specified and does not match the IEP, a new order should be requested.</li> <li>• If an order template is being used with multiple services, make sure the correct services are checked.</li> </ul>	<ul style="list-style-type: none"> <li>• OT 2X (<i>frequency listed, but not the duration</i>)</li> <li>• As per the regulations, either the reference to the IEP <b>or</b> the specific frequency/duration should be used on the order; <b>not both.</b></li> <li>• If the frequency/duration are adopted by IEP reference, on the order and the frequency/duration changes, a new written order is required; “as per IEP” no longer applies once the IEP changes.</li> </ul>
<b>4. Patient Diagnosis / Need for Service(s)</b>	<ul style="list-style-type: none"> <li>• ICD Code – F82</li> <li>• “Specific developmental disorder of motor function”</li> </ul>	<ul style="list-style-type: none"> <li>• The absence of an ICD code or reason/need for service.</li> </ul>
<b>5. Signature of the Order Practitioner Is the order Signed?</b>	<p><u>Acceptable methods of signing:</u></p> <ul style="list-style-type: none"> <li>• Signed with a hand-written signature</li> <li>• Signed with an electronic or digital signature*</li> </ul>	<p><u>Unacceptable methods of signing:</u></p> <ul style="list-style-type: none"> <li>• Signature stamp</li> <li>• Scanned “image” of signature (i.e., JPEG) or font substitution</li> </ul>
<b>6. Date the Order was Written &amp; Signed</b>	<ul style="list-style-type: none"> <li>• June 1, 2019,</li> <li>• 6/1/19, or</li> <li>• 6/1/2019</li> </ul>	<ul style="list-style-type: none"> <li>• Absence of the date the order was signed.</li> <li>• Date is unclear</li> <li>• An unacceptable correction was made.</li> </ul>
<b>7. Ordering Practitioner’s NPI or License #</b>	<p>NPI <b>or</b> license number is required on the order; however, both the NPI and license number are <i>preferred</i>* on the order.</p> <ul style="list-style-type: none"> <li>• NPI number (<i>Is the NPI # 10 digits?</i>) 1234567890</li> <li>• License number (<i>Is the license # 6 digits?</i>) 123456</li> </ul> <p>* Having both the NPI and License number on the order will reduce the chance of potential issues.</p>	<ul style="list-style-type: none"> <li>• Absence of the NPI or the license number. One must be delineated on the order.</li> <li>• NPI and license numbers are listed on order, but are not readable. (<i>Handwriting is illegible or a stamp was used and not readable.</i>)</li> <li>• A stamp of the practitioner’s NPI/License # was used and was stamped over other pertinent information on the order.</li> </ul>
<b>8. Ordering Practitioners Contact Information</b>	<ul style="list-style-type: none"> <li>• 123 Main Street (<i>Street Address</i>) Anytown, NY 12345 (<i>City, State, Zip</i>) (516) 555-5555 (<i>Phone number w/ area code</i>)</li> </ul>	<ul style="list-style-type: none"> <li>• 123 Main Street Anytown, NY 12345 (<i>Phone # missing</i>)</li> <li>• 123 Main Street Anytown (<i>State, zip &amp; phone # missing</i>)</li> <li>• The contact information is included, but not readable, or a stamp was used and the stamped information was placed over other pertinent information on the order.</li> </ul>
<p><b>A NEW WRITTEN ORDER IS REQUIRED FOR THE FOLLOWING REASONS:</b> (Annual Review Meeting • Change in Service • Transfer Meeting • New Referral)</p> <ul style="list-style-type: none"> <li>✓ Each IEP period (<i>Annual Review, Summer Session/Winter Session if not listed on the same IEP</i>)</li> <li>✓ Whenever a review meeting results in a change of service (<i>frequency/duration/class size</i>)</li> <li>✓ The child transfers to another school district (<i>This requires a new IEP so a new order is required.</i>)</li> <li>✓ New Referrals (<i>Newly-identified students</i>)</li> </ul> <p>* The “As per IEP” reference does not apply once the IEP changes. A new order is required for any of the circumstances listed above.</p>		