

BREAKOUT SESSION

School-Based Medicaid & Synergy Integration

An interactive discussion exploring data sync, streamlined processes, and optimized federal funding strategies.

Presented by: Kathy Warren & Jessica Contreras



ABOUT THE PRESENTERS:

Kathy Warren

- SEAS Medicaid Customer Service & Support Specialist since January 2020
- Was a school-based Medicaid Coordinator at Flagstaff Unified for 14 years.
- She is well versed in e-IEP Pro and the entire School-Based Medicaid Program!
- **Fun Fact:** She was born & raised in the Pea and Lentil Capital of the world! Does anyone know where that is?!?!



ABOUT THE PRESENTERS:

Jessica Contreras

- SEAS Medicaid Compliance Officer since September 2024.
- Was a school-based Medicaid Coordinator at Glendale Union for 11 years.
- She has been through 4 PCG Compliance Reviews as a coordinator and now assists districts when they are selected to go through the compliance review process.
- **Fun Fact!** She went to see a friend's band one time at a local venue and got to meet Vince Vaughn, James Hatfield, and Tom Morello all in the same night!!!



| The School-Based Billing Landscape

Reimbursement Realities

School districts face ongoing operational hurdles trying to secure federal IDEA funds while strictly maintaining clinical document accuracy.

AUDIENCE QUESTION

Where does your district encounter the greatest operational friction when using Synergy in School-Based Medicaid?

Administrative Burden

SLPs, OTs, PTs, Nurses, and Behavior Health Providers are clinicians first. Navigating multiple digital platforms, paper logs, and compliance regulations can quickly lose motivation.

AUDIENCE QUESTION

How do you help your providers reduce clinician logging steps without dropping state audit readiness standards?

| Synergy SE Sync & Data Integration



Automated Sync for ROPA

Double-entering student IEP structures wastes admin resources and creates severe drift in document compliance.

AUDIENCE QUESTION

Has anyone had success with extracting an IEP file with the IEP and QMP that signed for each therapy service?

Are you able to use the SEAS Template for upload to DSCtop?

How is that working for you?



HA ADL Files

ADLs and transportation is where the most reimbursement comes from because services happen daily.

AUDIENCE QUESTION

Has anyone had success in getting the ADL information into the SEAS Template?

Most of the ones we see list the student multiple times in the file once per ADL vs one line with ADLs are at the end.

EXAMPLE: *Each cell should look like this:*

Toileting, grooming, use of assistive devices



Progress Report Tracking

Unsigned progress report updates in students' IEPs can lead to finding during your PCG Compliance Review. This audit happens every 4 years.

AUDIENCE QUESTION

How often do you check up on your providers to make sure each provider that has direct services is signing their progress report updates?

Do you do wet signatures, or is your district using electronic signatures?

| Maximizing Nurse Billing and IEP Uploads

Simplify Logging Steps for Nurses

School Based Nurses are always busy. Double charting in both Synergy and DSCtop is a time burden and creates more room for errors in their billing.

AUDIENCE QUESTION

Does your district double chart, or have you found a way to have your nurse's chart in Synergy and send to SEAS for DSCtop upload?

Locking IEPs for DSCtop uploads

Locking IEPs is important as IEPs will not transfer to DSCtop without being locked.

AUDIENCE QUESTION

How does your district successfully make sure IEPs are locked for kiddos with services?

| Other Health Plans (OPOCs) & Transfer IEPs

Billing for Open Care Students on an OPOC

General Education Students that have an Other Plan of Care (OPOC) that are eligible for Medicaid can be submitted for reimbursement through the School-Based Medicaid Program. This became effective during the 2019-2020 school year.

AUDIENCE QUESTION

*Is your district seeking reimbursement through OPOCs yet?
Are your providers creating these in Synergy?*

Is someone in your district making sure that these OPOCs are compliant?

If the service is provided by an SLP, OT, or PT, they must include the scope, frequency, & duration, report progress, and be signed by the provider.

Transfer IEPs

IEP Transfers that are not signed by your providers are not eligible for reimbursement.

AUDIENCE QUESTION

How does your district handle Transfer IEPs?

Do your case managers hold a new IEP right away?

Do your providers sign the transfer IEP with something like “Approved and Accepted by NAME, Credentials, Date”

If you upload a transfer IEP to historical docs, but don’t enter the info into a shell IEP it will not pull that IEP for your DSCtop uploads.

| Parental Consent & Compliance



Leveraging Synergy ParentVUE

Securing parental consent is a critical federal mandate. If a parent ignores standard flyers or refuses, the district cannot claim billing, even if the service is legally mandated under IDEA.

AUDIENCE QUESTION

Has your district successfully embedded the initial Medicaid consent signature into the ParentVUE annual enrollment workflow? If not, how is your district handling Parent Consent?

*If you encounter a student that the parent does **NOT** give permission. How are you handling that?*

| Primary Drivers of Medicaid Claim Denials

- Missing Parental Consent
- Incomplete/ Unsigned Service Records (Unconfirmed Claims)
- Expired Provider Licensure
- Providers not listed as ROPA Provider that are signing IEPs.
(This only applies to SLPs, OTs, and PTs)
- Missed Timeliness Deadlines
(In Arizona, the deadline is 180-day (6-month) timely filing limit from the date of service.)



| Workflow Friction: Risk vs. High-Yield

OPERATIONAL AREA	HIGH-FRICTION SETUP (REVENUE LEAKAGE)	OPTIMIZED SYNERGY WORKFLOW (HIGH-YIELD)	STRATEGIC VALUE
Parent Consent Capture	Paper forms sent home via backpacks; manually filed.	Digital signature integrated into ParentVUE registration.	More students receiving services can have their claims sent in for reimbursement.
Synergy to DSCtop Sync	Double-entry details across platforms.	Automated data synchronization between programs.	Ensures DSCtop stays up to date with your providers goals, progress reports, ROPA info, and current IEPs
Evaluation Checks	Unsigned evaluations by providers creates a high audit risk.	Implement district-level quality checks for MET signatures from providers. .	Loss of MET signatures can result in findings during a PCG Compliance Review.
Provider Logging	Collection of paper logs (if using) is a cumbersome task for the coordinator.	Direct logging ensures that provider therapy notes and service records are submitted and securely stored in DSCtop for audit compliance, even if a provider leaves the district.	Loss of paperwork at the district level can result in no reimbursement for that claim.

| SE User Work Group



Did you know that Edupoint has an SE Users Work Group that meets with districts to gather info on Synergy issues.

This is a great opportunity to talk to Edupoint Reps, so they are in the know on what districts are needing for Medicaid and other SE Synergy issues.

Find another Synergy district to see if they are in the group. They can get you in touch with the right people to get invited to these virtual meetings.

| Questions?





THANK YOU!

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