

**STATE OF CONNECTICUT**  
**DEPARTMENT OF SOCIAL SERVICES**  
**SBCH PROGRAM - REIMBURSEMENT AND CON**  
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**Bulletin - SBCH Service Documentation & Retention and MSI**  
**Form Part 2**

5/23/2022

**Service Documentation & Retention**

As stated in the State of Connecticut Regulation of the Department of Social Services concerning requirements for Payment for School-based Child Health Services, Sec. 17b-262-220, Documentation and Record Retention Requirements, please be advised of the following:

- (a) A permanent service record documenting each SBCH service provided to each Medicaid eligible child shall be maintained by the LEA at which the child is enrolled at the time of service. The permanent service record may be in paper or electronic format, shall provide an audit trail and shall include, but is not limited to:
  - (1) the written evaluation and the results of any diagnostic tests;
  - (2) the child's diagnosis, in a manner acceptable to the department;
  - (3) the IEP signed in accordance with section 10-76d (d) (9) of the Connecticut General Statutes; and
  - (4) session note(s) signed by a licensed or certified allied health professional who performed or supervised the services within the scope of his or her practice under state law.
  
- (b) For each date of service, the qualified health care provider shall keep a service record within the child's record containing all of the following:
  - (1) The date of service;
  - (2) The type of service;
  - (3) The units of service;
  - (4) A brief description of the service provided;
  - (5) Whether the service was performed in a group or individual setting; and
  - (6) The signature of the qualified health care provider performing the service.
  
- (c) The LEA shall maintain a current record of the applicable licenses or certificates of practice of all licensed or certified persons performing SBCH services.
  
- (d) The LEA shall maintain all supporting records of costs reported for SBCH services.
  
- (e) All records shall be maintained for at least six (6) years.

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## **MSI Form- Part 2**

MSI Form-Part 2 (Narrative) is to be completed at least quarterly pursuant to IDEA requirements. The progress note should reflect the providers' relationship with the student they serviced and should address the goals set. If the student was not serviced regularly for the time written into his/her IEP, providers should make a note to that effort.

Part 2 Narrative forms need to be filled out on a student only if they received services during that narrative quarter. If a student transfers in district at any time during a narrative quarter, each provider that has serviced him/her should complete a MSI Part 1 Claiming form and a progress note for the time they saw the student.

Part 2 Narrative forms reflect progress for the designated service month only. Part 2 forms may be completed in either a paper or electronic format. Part 2 forms are retained by the district.

Districts which have not yet formally or fully implemented this requirement are required to do so by September 1, 2022.