

Documentating Medicaid Consent in ACHIEVE

Historically, the Medicaid consent form was available in the legacy system and on the Department's [School-Based Medicaid webpage](#). Currently, three unique Medicaid consent forms are also available in ACHIEVE:

1. **Early ACCESS:** Consent for Medicaid Reimbursement for IFSP Services
2. **Special Education:** Consent for Medicaid AEA
3. **Special Education:** Consent for Medicaid LEA

Families may provide consent allowing each respective agency to access Medicaid insurance information to determine eligibility and, if eligible, to seek reimbursement for agency-provided services in the following ways:

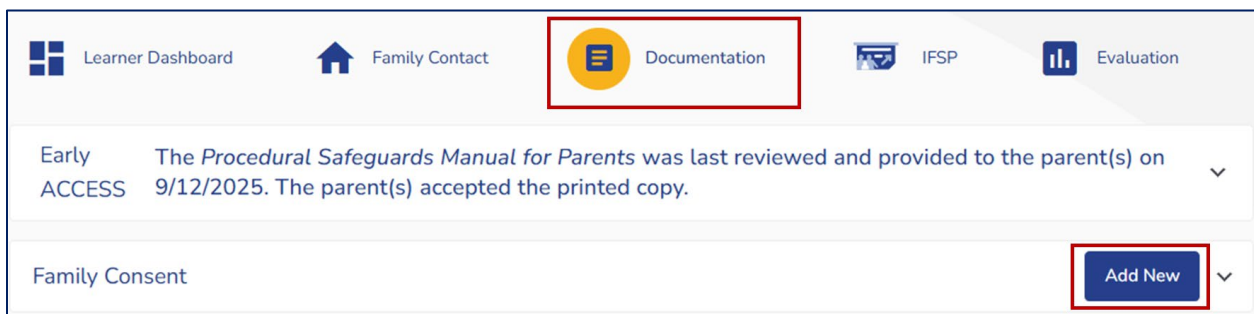
1. Digitally sign the existing Medicaid Consent in ACHIEVE,
2. Physically sign a printed copy of the existing Medicaid Consent in ACHIEVE (a copy of which must be uploaded into ACHIEVE while manually changing consent status), OR
3. Physically or electronically sign a Medicaid consent form available in the legacy system or from the [School-Based Medicaid webpage](#) (a copy of which must be uploaded into ACHIEVE while manually changing consent status).

To support the rollout of new Medicaid eligibility reports in ACHIEVE, learners must have Medicaid consents documented in ACHIEVE, including those previously signed on a consent form outside of ACHIEVE.

Documenting Medicaid Consents for Early ACCESS Learners

IFSP Service Coordinators, IFSP Service Providers, and AEA Staff assigned with an edit user role for the learner's AEA may complete the following steps:

1. Navigate to the **Learner Dashboard** for the corresponding learner.
2. In the **Documentation** stepper, navigate to the **Family Consent** accordion.
3. Select the **Add New** button.



The screenshot shows the ACHIEVE system interface. At the top, there is a navigation bar with icons and labels for 'Learner Dashboard', 'Family Contact', 'Documentation' (highlighted with a red box), 'IFSP', and 'Evaluation'. Below this, there is a section for 'Early ACCESS' with a text entry: 'The Procedural Safeguards Manual for Parents was last reviewed and provided to the parent(s) on 9/12/2025. The parent(s) accepted the printed copy.' Below this section, there is a 'Family Consent' accordion, which is expanded to show an 'Add New' button (highlighted with a red box).

4. A pop-up modal allows you to request a new *Consent for Medicaid Reimbursement of IFSP Services*.
 - a. *Note: For learners for whom a signed consent has been obtained prior to requesting the consent in ACHIEVE, a **backdated Request Date** should be entered when adding the new consent to align with the timeframe in which the consent was originally provided to the family.*

Add New Consent

Type of Consent
 Consent for Medicaid Reimbursement for IFSP Services

Notes

Status
 Requested

Date
 10/01/2024

Cancel Complete

5. Discuss implications of Medicaid consent form with family and determine whether family agrees to provide consent for the agency to access Medicaid insurance information to determine eligibility and, if eligible, to seek reimbursement for agency-provided services.
6. Consent may be documented in ACHIEVE in several ways:
 - a. Family member signs ACHIEVE consent electronically via the ACHIEVE Family Portal.
 - b. Family member signs ACHIEVE consent electronically during an in-person meeting.
 - i. To allow family to sign consent electronically during an in-person meeting, expand the Medicaid consent accordion menu.
 - ii. Select the kebab next to the corresponding family member's name.
 - iii. Select *Sign*.

Consent Type	Notes	Status	Date
⋮	Consent for Medicaid Reimbursement for IFSP Services	Requested	12/22/2025 ^

Signatures

View Add Signatures

Actions	First Name	Last Name	Signature Status
⋮	Example	Parent1	Pending
Sign	Example	Parent2	Pending

- c. Family member physically or electronically signs a non-ACHIEVE consent form.
 - i. When this option is used, consent status must be manually changed by the **IFSP Service Coordinator** by selecting the kebab to the left of the Medicaid consent. This will display the option to upload a document, update notes, and/or add a status.

Consent Type	Notes	Status	Date	
Consent for Medicaid Reimbursement for IFSP Services		Requested	12/22/2025	▼
<div> <div>⋮</div> <div> <div>Upload Document</div> <div>Update Notes</div> <div>Add Status</div> </div> </div>				

- ii. Select **Add Status** to manually update the consent status to Approved or Declined, enter the Date Received, Date Signed, and name of person provide consent. A copy of the signed consent form may also be uploaded here.
- iii. *Note: Only the **IFSP Service Coordinator** will have option to select **Add Status** and manually change consent status. Service Providers and other AEA staff will not be able to complete this process.*

Update Consent for Medicaid Reimbursement for IFSP Services

Status Type *

Notes

Date Received*

Signed By*

Date Signed*

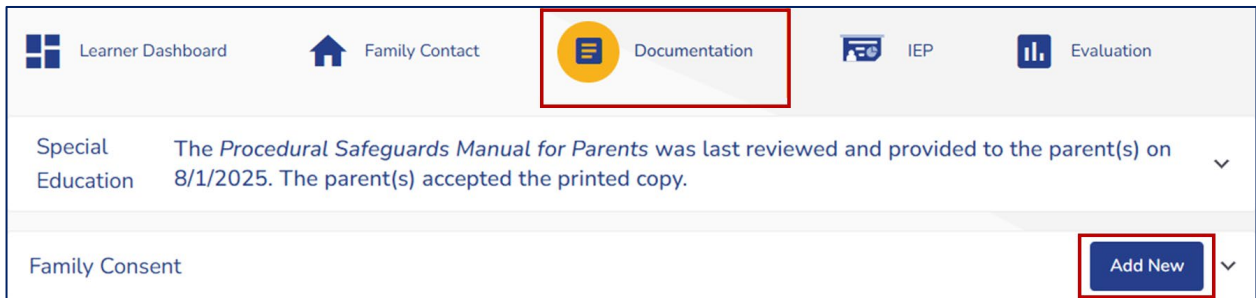
Upload Document

Cancel
Ok

Documenting Medicaid Consents for Special Education Learners

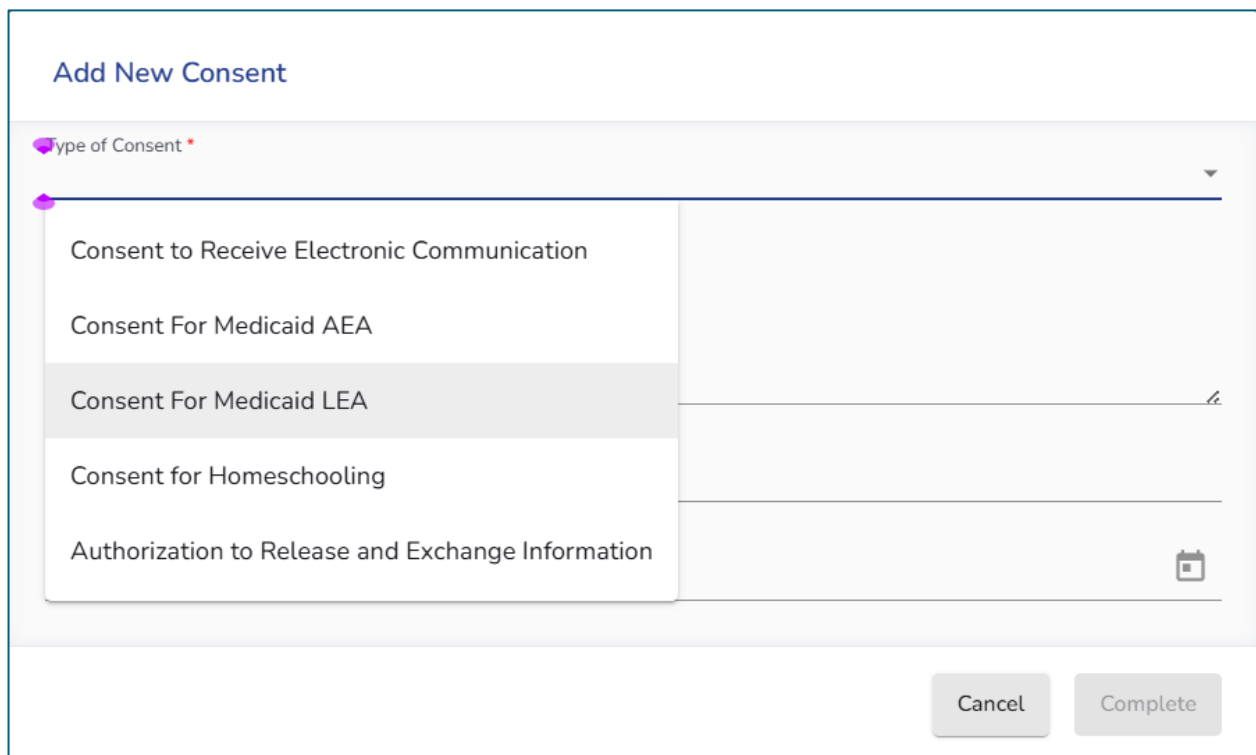
IEP Facilitators, IEP Service Providers, and LEA Staff assigned with an edit user role for the learner's LEA may complete the following steps:

1. Navigate to the **Learner Dashboard** for the corresponding learner.
2. In the **Documentation** stepper, navigate to the **Family Consent** accordion.
3. Select the **Add New** button.



The screenshot shows the top navigation bar with icons for Learner Dashboard, Family Contact, Documentation (highlighted with a red box), IEP, and Evaluation. Below the navigation bar, there is a section for Special Education with a text entry: "The Procedural Safeguards Manual for Parents was last reviewed and provided to the parent(s) on 8/1/2025. The parent(s) accepted the printed copy." Below this, there is a Family Consent section with an "Add New" button highlighted by a red box.

4. A pop-up modal will allow you to request a *Consent for Medicaid AEA* or *Consent for Medicaid LEA*. You will be required to indicate the corresponding AEA or LEA requesting permission for Medicaid reimbursement within this pop-up modal.



The screenshot shows a modal titled "Add New Consent". It features a dropdown menu labeled "Type of Consent" with a red asterisk. The dropdown is open, showing five options: "Consent to Receive Electronic Communication", "Consent For Medicaid AEA", "Consent For Medicaid LEA" (which is highlighted), "Consent for Homeschooling", and "Authorization to Release and Exchange Information". At the bottom of the modal, there are two buttons: "Cancel" and "Complete".

- a. *Note: For learners for whom a signed consent has been obtained prior to requesting the consent in ACHIEVE, a **backdated Request Date** should be entered when adding the new consent to align with the timeframe in which the consent was originally provided to the family.*

Add New Consent

Type of Consent
Consent For Medicaid AEA

AEA *
A value must be selected from the list

Notes

Status
Requested

Date
10/01/2024

Cancel Complete

5. Discuss implications of Medicaid consent form with family and determine whether family agrees to provide consent for the agency to access Medicaid insurance information to determine eligibility and, if eligible, to seek reimbursement for agency-provided services.
6. Consent may be documented in ACHIEVE in several ways:
 - a. Family member signs ACHIEVE consent electronically via the ACHIEVE Family Portal.
 - b. Family member signs ACHIEVE consent electronically during an in-person meeting.
 - i. To allow family to sign consent electronically during an in-person meeting, expand the Medicaid consent accordion menu.
 - ii. Select the kebab next to the corresponding family member's name.
 - iii. Select *Sign*.

Consent for Medicaid AEA (AEA Name) – OR –
Consent for Medicaid LEA (LEA Name)

Requested

10/3/2025

⌵

Signatures

View Add Signatures

Actions	First Name	Last Name	Signature Status
⋮	Example	Parent1	Pending
✍ Sign	Example	Parent2	Pending

- c. Family member physically or electronically signs a non-ACHIEVE consent form.
 - i. When this option is used, consent status must be manually changed by the **IEP Facilitator** by selecting the kebab to the left of the Medicaid consent. This will display the option to upload a document, update notes, and/or add a status.

The screenshot shows a 'Family Consent' interface. At the top, there is a instruction: 'Click on the consent to view/sign.' Below this is a table with columns: 'Consent Type', 'Notes', and 'Status'. A single row is visible with 'Consent For Medicaid AEA' in the 'Consent Type' column and 'Requested' in the 'Status' column. To the left of this row is a kebab menu (three vertical dots) which is circled in red. A dropdown menu is open from this kebab, showing three options: 'Upload Document', 'Update Notes', and 'Add Status'. The 'Add Status' option is highlighted in yellow. A red line connects the red circle around the kebab to the 'Add Status' option.

- ii. Select **Add Status**. Manually update the consent status to Approved or Declined, enter the Date Received, Date Signed, and name of person provide consent. A copy of the signed consent form may also be uploaded here.
- iii. *Note: Only the assigned **IEP facilitator** will have the option to select **Add Status** and to manually change consent status. Service Providers and other LEA staff will not be able to complete this process.*

The screenshot shows the 'Update Consent For Medicaid AEA' form. It contains several input fields: 'Status Type*' (with a red box around it and a red error message 'Field is required' below it), 'Notes', 'Date Received*' (with a calendar icon), 'Signed By', and 'Date Signed' (with a calendar icon). At the bottom of the form is a yellow 'Upload Document' button, which is also highlighted with a red box. Below the form are 'Cancel' and 'Ok' buttons.