



# OCCUPATIONAL THERAPIST OCCUPATIONAL THERAPIST ASSISTANT (COTA) LEA Billing Option Program (LEA)

## Who Can claim LEA reimbursement?

- Registered Occupational Therapist:  
Must be licensed to practice by the California Board of Occupational Therapy. Occupational therapists must be graduates of an educational program for occupational therapists that is accredited by the American Occupational Therapy Association's Accreditation Council for Occupational Therapy Education (ACOTE).
- Certified Occupational Therapist Assistant (COTA)  
♥ Must be licensed to practice by the California Board of Occupational Therapy.

## YOU CAN CLAIM LEA REIMBURSEMENT FOR:

### IEP Assessments (OTs only):

Initial (even if the student does not qualify for an IEP)  
Annual  
Triennial  
Amended

\*Recommendation or referral is required and must be documented in student file or stored in SBR system.

### NON-IEP Assessments (OTs only):

Non-IEP Developmental  
EPSDT Recommended Screenings [periodicity schedule.pdf \(aap.org\)](#)

### IEP Treatments:

Individual and Group

### NON-IEP Treatments:

Individual and Group

**Targeted Case Management (TCM):** Assist eligible children and family members to access needed medical, social, educational, and other services when TCM is covered by an IEP or IFSP or other health plan.



## SUPERVISION:

Supervision is required by licensed Occupational Therapist

## LEA PROGRAM REQUIREMENTS:

- Treatments must be medically necessary.
- Treatments must be identified in a student's **IEP, 504** or other **Care Plan**.
- Student must be covered by Medi-Cal during time of treatment.
- Student must have signed orders (**ORP**) for all OT services, updated annually.
- The referral for assessment and the assessment documentation must be kept five years after reimbursement and be available for audit review.
- Treatment and progress notes must be recorded in the SBR LEA-WEB system or some other method that is readily available for audit review for five years after reimbursement.

## HOW TO LOG ON TO THE SBR LEA-WEB SYSTEM:

Open a WEB browser and enter [ca.sbrpartners.com](http://ca.sbrpartners.com) in the address line.  
Enter username (district email) and password. (New users click "New User" and follow instructions).



## LEA REIMBURSEMENT RATES

OT Assessment	Initial or Triennial	\$122.60
OT Assessment	Amended or Annual	\$85.14
OT Treatment Individual	First 45 minutes	\$40.44
OT Treatment Group	First 45 minutes	\$13.90
COTA Treatment Individual	First 45 minutes	\$17.94
COTA Treatment Group	First 45 minutes	\$5.98

Treatment service increments are rounded up to one unit if direct task takes 7+ continuous minutes

## REQUIRED COMPONENTS OF AN ASSESSMENT

ACTIVITY	Ini/Tri	Ann/Amend
Review student records	✓	✓
Interview student and/or parent/guardian	✓	✓
Observation of student in appropriate settings	✓	✓
Schedule and administer appropriate tests and assessments	✓	If Needed
Score and interpret test results, as applicable	✓	If Needed
Write a report summarizing assessment results	✓	✓

## REMINDERS

### DOCUMENT YOUR NOTES AND PROGRESS (Program requirement)

Make sure you enter documentation in the NOTES section of the Treatment Input Screen. Type in a brief description of the activity you were working on and some measurement or progress toward the goal. This will ensure audit proof claims. **This is mandatory for billing.**

### E-SIGN YOUR LOGS (Program requirement)

Sign individual logs or in bulk by month. Supervisors can review and sign once the supervised practitioner has signed. **This is mandatory for billing.**

### ORP (Ordering, Referring, Prescribing) (Program requirement)

An ORP is required to bill Medi-Cal for treatments (not required for assessments). The ORP is created for individual students by a licensed practitioner and must cover all dates of service and be renewed annually. Each ORP must be approved and signed by an eligible ORP signer. This process is done electronically in the SBR system. **This is mandatory for billing.**

### MAA MOMENTS (Program requirement)

In order to participate in the LEA Billing Program, you must also participate in MAA; contracted staff are an exception. Your MAA participation will affect your LEA Billing reimbursement. One of the 4 questions you will be asked is whether you were working on an activity related to a student's IEP or Health Care Plan. If you are providing a health service, make sure your response reflects that and you log the service into the SBR-LEA Billing System. You will have 24 hr. notification and 4 working days to respond to your moment. Unanswered moments will negatively impact your district's LEA Billing and MAA results.

### HOW TO...

Don't forget to check out the HOW TO tab for documents and videos to help you navigate the SBR system.

