

Internal Self-Assessment (ISA) and District Self-Assessment (DSA) Overview

**Office of Medicaid Services (OMS)
2025–2026**



**SOUTH CAROLINA
DEPARTMENT OF EDUCATION**

Purpose of Training

To provide an overview of the Internal Self-Assessment (ISA) and District Self-Assessment (DSA) completion within the Quality Assurance (QA) application.



Internal Self-Assessment (ISA)

The school districts' South Carolina Department of Health and Human Service (SCDHHS) Rehabilitative and Related Services contract requires each school district to complete a QA Internal Self-Assessment (ISA) at least 14 days prior to the annual QA review. SCDHHS requires each school district to complete a student record review and enter the findings of the audit into the “Discrepancies” section of the QA application's ISA tab.



Internal Self-Assessment Components

The internal self-assessment must include:

- examination of a random sampling of records. This sample must include at least one (1) record from each service type.
- examination of records related to School District Administrative Claiming (SDAC) and Special Needs Transportation (SNT).
- assessment of compliance with Medicaid standards, policies, and procedures.
- evaluation of credentials of staff involved in the provision of Medicaid related services.
- review of the Medicaid billing operation.
- the checklists published on the OMS webpage.



ISA Resources

The OMS' webpage has the following resources to help the districts with the ISA completion:

- ISA/DSA Overview: a presentation that covers the entire ISA/DSA completion process.
- QA Checklists: to be utilized for the student's file review.
- ISA Checklist: to guide the districts step-by-step, while completing the ISA.



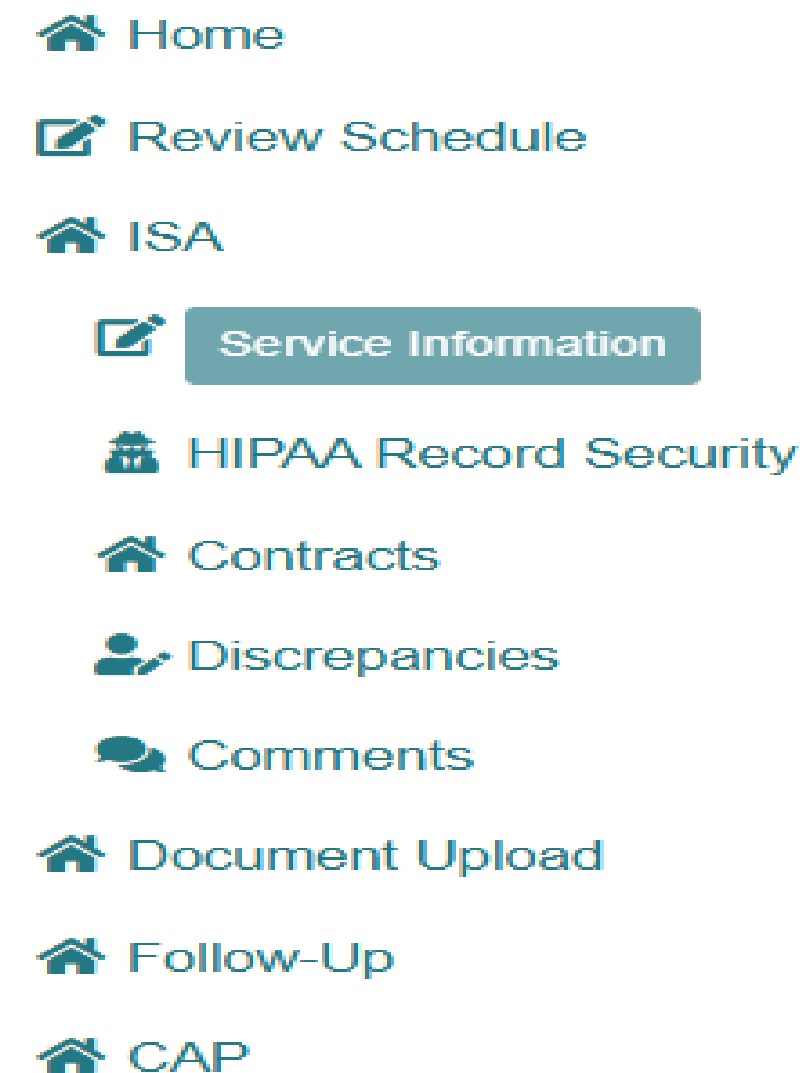
ISA Requirements

- The ISA must be completed at least 14 days prior to the scheduled review date.
- Once the QA review is scheduled the district may complete the ISA.
- If the ISA is not completed at least 14 days prior to the review date, the QA review may be cancelled, and the system will generate an email to the Medicaid Coordinator (listed in DEIMs) on day 13 prior to the QA review stating the district will conduct a DSA (their own QA review).



ISA—Log in

- If district staff has issues with logging onto the QA application or password issues, contact the Web Access Coordinator (WAC) before reaching out to the OMS.
- Once logged in, notice that the application tabs are located on the left side of the screen.
- Click the “ISA” tab to move to the first section.



ISA—Service Information

- In this section the services provided by the district are entered.
- Select the service option(s) that apply to the district.
- Enter the required information in each field.

Service Information - Create New
(Rehabilitative Services for which the District Bills Medicaid)

Home
Review Schedule
ISA
Service Information
HIPAA Record Security
Contracts
Discrepancies
Comments
Document Upload
Follow-Up
CAP

Service *

Occupational Therapy Services (OT) ▼

☐ District has providers which it employs who provide the service?
☒ District subcontracts with a provider?

Total Providers Rendering Service *

3

Total Medicaid Students Receiving Services *

35

Save Back



ISA—Service Information (Cont.)

Service Information is the first section of the ISA tab and the information to be entered is:

- Service Type.
- If the district provides/subcontracts the service.
- *# Total providers rendering the service.
- *# Total Medicaid students receiving the service
- The district staff must click the “Create New” button to enter information.

*This # does not have to be entered for SDAC.

Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Service Information - 2025-2026

(Rehabilitative Services for which the District Bills Medicaid)

Create New

Show 10 entries

Search:

Service	District Provides	District Subcontracts	# Total Providers Rendering Service	# Total Medicaid Students Receiving Services	
Occupational Therapy Services (OT)	☐	☒	3	35	EditDelete

Showing 1 to 1 of 1 entries

Previous1Next

Next

Back



ISA—Service Review

- Once all entries are made, there is the option to edit or delete, if needed.
- Clicking the “next” button on the lower left side will lead to the next section.

Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Service Information - 2025-2026

(Rehabilitative Services for which the District Bills Medicaid)

Create New

Show 10 entries

Search:

Service	District Provides	District Subcontracts	# Total Providers Rendering Service	# Total Medicaid Students Receiving Services		
General Nursing Service	☒	☐	20	5000	Edit	Delete
Nursing: IHP/ITP Service	☒	☐	5	15	Edit	Delete
Occupational Therapy Services (OT)	☐	☒	3	35	Edit	Delete
Physical Therapy Services (PT)	☐	☒	2	35	Edit	Delete
Speech Therapy Services (ST)	☒	☐	7	75	Edit	Delete

Showing 1 to 5 of 5 entries

Previous1Next

Next

Back



ISA—HIPAA Record Security

- All school districts (SDs) are required to comply with all Federal HIPAA standards and regulations.
- The district must answer all questions by selecting an option from the dropdown menu and then click “Save.”
- The system will then advance the application to the “Contracts” tab.

HIPAA Record Security View

District: Darlington Review Year: 2025 - 2026

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Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

HIPAA Record Security - 2025-2026

Does your school district have an Information, Security, and Privacy policy in place to protect the school district's Medicaid files?

-- Select an Option --

How often are the electronic records backed up?

-- Select an Option --

How often does the Information Technologist (IT) staff scan for data breaches, virus, and malware?

-- Select an Option --

Do you have a Record's Management staff or a privacy liaison?

-- Select an Option --

Does your school district follow the Federal, State (Proviso), and Local Education regulations related to record retention and purging documents?

-- Select an Option --

Save

Back



ISA—Contracts

- The district is required to provide the OMS with information regarding SCDHHS contracts.
- The district must click on the “Create New” button to upload contracts.
- The district will select the option(s) that apply.

Create Contract

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Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Contracts – New

Do you have Contracts on file for the PRIOR and CURRENT school year (check all that apply):

☒

SCDHHS SBRS/RBHS Contract

☐

RBHS Subcontract (if applicable)

Upload Contract

Choose Files

No file chosen

Save

Back

ISA—Contracts Upload

This screen displays the “Choose Files” button to upload the applicable contract(s).

Create Contract

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Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Contracts – New

Do you have Contracts on file for the PRIOR and CURRENT school year (check all that apply):

☒

SCDHHS SBRS/RBHS Contract

☐

RBHS Subcontract (if applicable)

Upload Contract

Choose Files

Contract (TEST).docx

Save

Back



ISA—Contracts Review

Once the district finishes uploading the contract(s), there is an opportunity to review the uploads and edit or delete, if needed.

Contracts

District: Darlington Review Year: 2025 - 2026

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Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Contracts - 2025-2026

SCDHHS SBRS/RBHS Contract	RBHS Subcontract (if applicable)	
☒	☐	EditDelete

Next

Back



ISA—Discrepancies

- In this section, the district will report the findings of the ISA. The staff must click the “Create New” button. The system will prompt the staff to complete all fields for each file reviewed.
- The district must audit at least one file per service using the QA checklists found on the OMS webpage. The findings from the district’s audit must be documented in the discrepancies section of the ISA.

Discrepancies

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Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Discrepancies in Services and Billing - 2025-2026

Create New

Show 10 entries

Search:

Service	Discrepancy Noted	Corrective Action	Student Name	SCDE Comments
No data available in table				

Showing 0 to 0 of 0 entries

Previous Next

Next

Back



ISA—Discrepancies Detail

- Select the service from the drop-down menu and applicable option (i.e., district performed service or subcontracted service).
- Enter the student's name in the “Student Name” field.
- Select “Yes” or “No” if there was or was not an identified discrepancy.
- Save entries and continue.

Create Discrepancy District: Darlington Review Year: 2025 - 2026 qa72testuser@gmail.com

Home
Review Schedule
ISA
Service Information
HIPAA Record Security
Contracts
Discrepancies
Comments
Document Upload
Follow-Up
CAP

Service Discrepancies - Create New

Service *
General Nursing Service

Service Performed By?
District performed service ☒ Subcontracted service ☐

Student Name *
Bruce Wayne

Was there a discrepancy identified?
Yes ☐ No ☒

Save Back



ISA—No Discrepancies

If no discrepancies were identified, the system will display “N/A” on the “Discrepancy Noted” and “Corrective Action” fields.

Discrepancies

District: Darlington Review Year: 2025 - 2026

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Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Discrepancies in Services and Billing - 2025-2026

Create New

Show 10 entries

Search:

Service	Discrepancy Noted	Corrective Action	Student Name	SCDE Comments
General Nursing Service	N/A	N/A	Bruce Wayne	

Showing 1 to 1 of 1 entries

Previous 1 Next

Next

Back



ISA—Discrepancies Identified

- The district staff must identify the service, the student's name, the checklist question number, and add a comment explaining the discrepancy.
- For each discrepancy, the district staff will need a corrective action plan (CAP) that must state how the mistake will be averted in the future.
- Once the CAP is completed, the district staff should click “Save” and continue the process until every service is reviewed. Click “Next” to proceed.
- The district must upload all completed checklists to the QA application, choosing “ISA Checklist” as the document type from the drop-down menu.

Create Discrepancy

District: Darlington Review Year: 2025 - 2026

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Home
Review Schedule
ISA
Service Information
HIPAA Record Security
Contracts
Discrepancies
Comments
Document Upload
Follow-Up
CAP

Service Discrepancies - Create New

Service *
Occupational Therapy Services (OT)

Service Performed By?
District performed service ☒ Subcontracted service ☐

Student Name *
Peter Parker

Was there a discrepancy identified?
Yes ☒ No ☐

Checklist Question Number *
5.2: Is each CSN dated, titled, and sig

Is each CSN dated, titled, and signed (electronically or handwritten) by the provider?

Discrepancy Noted *
The CSN for 9/1/24 is not titled.

1967 Characters remaining:

Corrective Action *
The Medicaid Coordinator will hold an OT staff training. All OT staff in attendance will be trained on completing CSNs correctly, including signing, dating, and titling all CSNs.
The OT supervisor will check OT staff's CSNs once per month.



ISA—Discrepancies Review

Once all entries are made, you have the option to edit or delete, if needed.

Discrepancies

District: DarlingtonReview Year: 2025 - 2026

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Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Discrepancies in Services and Billing - 2025-2026

Create New

Show 10 entries

Search:

Service	Discrepancy Noted	Corrective Action	Student Name	SCDE Comments
General Nursing Service	N/A	N/A	Bruce Wayne	EditDelete
Occupational Therapy Services (OT)	The CSN for 9/1/24 is not titled.	The Medicaid Coordinator will hold an OT staff training. All OT staff in attendance will be trained on completing CSNs correctly, including signing, dating, and titling all CSNs. The OT supervisor will check OT staff's CSNs once per month.	Peter Parker	EditDelete

Showing 1 to 2 of 2 entries

Previous1Next

Next

Back



ISA—Discrepancies OMS Comments

The ISA Discrepancy tab is interactive between the district and OMS.

- Once the ISA is submitted, the QA application will notify the Education Associate (EA).
- The EA will review the ISA and will be able to enter comments in the “Discrepancies” tab, if needed.
- The QA application will then generate an action email to notify the district that comments were added into the discrepancies tab.
- The district will log in to the QA application to review comments entered by the EA.

Discrepancies

District: Darlington Review Year: 2025 - 2026

tdouglas

Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Checklist

Follow-Up

CAP

Admin

Discrepancies in Services and Billing - 2025-2026

Create New

Show 10 entries

Search:

Service	Discrepancy Noted	Corrective Action	Student Name	SCDE Comments	
General Nursing Service	N/A	N/A	Bruce Wayne	Thank you for completing your ISA.	Edit Delete
Occupational Therapy Services (OT)	The CSN for 9/1/24 is not titled.	The Medicaid Coordinator will hold an OT staff training. All OT staff in attendance will be trained on completing CSNs correctly, including signing, dating, and titling all CSNs. The OT supervisor will check OT staff's CSNs once per month.	Peter Parker		Edit Delete

Showing 1 to 2 of 2 entries

Previous 1 Next

Next Back



ISA—Checklist Upload

- The completed checklists utilized for the ISA must be uploaded to the QA application.
- Checklists are required to be submitted even if no discrepancies were identified.
- Choose “ISA Student Checklist” as the document type to be uploaded.
- When uploading files, take into consideration the following system requirements for naming conventions of documentation:
 1. Districts should refrain from using the following characters when naming documents: / \ : * ? “ < > | .
 2. The character limit for titles of documents must be no larger than 50 characters.

Document Upload

District: Darlington Review Year: 2025 - 2026

qa72testuser@gmail.com

Home

Review Schedule

ISA

Document Upload

Follow-Up

CAP

Document Upload

Upload a Document

ISA Student Checklist

Choose Files No file chosen Upload

Show 10 entries

Search:

Name	Date	Type		
Contract (TEST1).pdf	07/03/2025 07:58 AM	ISA Document	Download	Delete

Previous 1 Next



ISA—Comments

- The district is not required to enter comments; however, the OMS encourages the district to enter comments.
- The district may write comments regarding their ISA, QA review, and/or training requests.
- To write a comment, click the “Create New” button, enter the comment, and save.

Comments

District: Darlington Review Year: 2025 - 2026

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Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Comment - Create New

Comments

1

2

The following are being addressed for the discrepancies identified:

- OT Training for CSNs

1913 Characters remaining:

Save

Back



ISA—Submission

- Prior to submitting the ISA, the district has the option to edit or delete comments.
- This is the last opportunity to review all entries in every section of the ISA to make and save changes before submitting.
- Once all entries have been reviewed click the “Submit” button.

Comments

District: Darlington Review Year: 2025 - 2026

qa72testuser@gmail.com

Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Comments - 2025-2026

Create New

Comments

User ID

Entry Date

The following are being addressed for the discrepancies identified:

QA72Testuser@gmail.com

7/3/2025 8:33:37 AM

Edit

Delete

OT Training for CSNs

Submit

Back



ISA—Submission Incomplete

- If any of the required steps of the ISA are not completed, the QA application will display a message in red, letting you know the submission failed.
- Review all sections and correct as needed to submit.
- Ensure that the screen displays a submission confirmation.

Comments

District: Darlington Review Year: 2025 - 2026

qa72testuser@gmail.com

Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Comments - 2025-2026

Create New

Comments

The following are being addressed for the discrepancies identified:

OT Training for CSNs

The Internal Self-Assessment cannot be submitted until the following pages have been entered: Contracts;

Submit

Back

User ID	Entry Date
QA72Testuser@gmail.com	7/3/2025 8:33:37 AM

Edit Delete



ISA—Submitted

- The QA application will display an ISA submission confirmation that verifies date and time of submission.
- A notification email will alert your assigned EA that the district’s ISA has been submitted.

ISA Submission Confirmation

District: Darlington Review Year: 2025 - 2026

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Home

Review Schedule

ISA

Service Information

HIPAA Record Security

Contracts

Discrepancies

Comments

Document Upload

Follow-Up

CAP

Internal Self-Assessment Submission Confirmation

Time Submitted: 7/3/2025 8:44:22 AM

SCDE Medicaid has been notified of your submission.



What happens if the ISA is not completed by the required due date?



District Self-Assessment (DSA)

- If the district does not complete their ISA by the due date, the district may not be reviewed by the SCDE's OMS.
- If the OMS does not conduct a QA review, the district must conduct a District Self-Assessment (Article 4, Section B of the district's SCDE SCDHHS contract).
- The district will receive notification if they must conduct a DSA and a due date reminder.



DSA Tab

- If the QA review is cancelled, the ISA section will no longer display on the QA application screen.
- A DSA tab will now display.

District Self-Assessment

District: Darlington Review Year: 2025 - 2026

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Home

Review Schedule

DSA

Document Upload

Follow-Up

CAP

District Self-Assessment

The Internal Self-Assessment (ISA) required per the district's contract with the South Carolina Department of Health and Human Services (SCDHHS) was due on: **6/4/2025**. Due to the ISA not being completed, the district must conduct a District Self-Assessment (DSA). The district is required to complete the DSA internally. The District Self-Assessment Summary is due on: **8/3/2025**.

To upload the District Self-Assessment Summary, click the **Choose File** button, select the District Self-Assessment Summary document, and then click **Upload**.

District Self-Assessment Summary

Choose File

No file chosen

Upload

The logo of the South Carolina Department of Education is a circular seal. It features a palm tree in the center, with an open book at its base. The words "SOUTH CAROLINA" are written along the top arc, and "DEPARTMENT OF EDUCATION" along the bottom arc. The year "1868" is inscribed at the very bottom.

DSA Requirements

- The district must review a random sample that represents all services rendered by the district and subcontractors.
- The sample must include at least 10 student files per service.
- All professional staff involved in the service delivery must be represented in the sample.
- Compliance with Medicaid standards, policies, and procedures must be assessed.
- The Self-Assessment must include credential checks of staff involved in the provision of Medicaid-related services.
- SCDE approved tools (i.e., checklists) shall be utilized to complete the DSA.



DSA Requirements (Cont.)

- The district's Medicaid billing operation's efficiency, effectiveness, and adherence to Medicaid policy must be assessed.
- An exit conference with staff must be held to discuss findings and develop a corrective action plan, if necessary.
- The student files and checklists utilized for the DSA must be uploaded to the QA Application as document type "Student File."
- Submit (upload) a summary report (assessment of the quality of Medicaid-related services, compliance with Medicaid regulations and policies, identified deficiencies, and corrective action recommendations CAP (if applicable); report shall also indicate any technical assistance requested from the SCDE.
- The document to upload shall be identified as District Self-Assessment (DSA) Summary Report.



DSA Completion

- Within two weeks of submission, the EA will review the submitted DSA Summary.
- The EA will arrange the provision of training and/or technical support, if requested.
- The OMS will send the DSA Summary Report to SCDHHS.



DSA Resources

The OMS' webpage has the following resources to help the districts with the DSA completion:

- ISA/DSA Overview: a presentation that covers the entire ISA/DSA completion process.
- DSA Checklist: to guide the districts, step-by-step, while completing the DSA.
- The DSA Summary Report template: a form that includes all the required components of the DSA Summary Report.



Uploading the DSA Summary Report

- To upload the DSA summary report, click “Choose File.”
- Click the “Upload” button.
- After completion, the screen will display an upload confirmation.
- The district’s assigned EA will review the DSA.

District Self-Assessment

District: Darlington Review Year: 2025 - 2026

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Home

Review Schedule

DSA

Document Upload

Follow-Up

CAP

District Self-Assessment

The Internal Self-Assessment (ISA) required per the district's contract with the South Carolina Department of Health and Human Services (SCDHHS) was due on: **6/4/2025**. Due to the ISA not being completed, the district must conduct a District Self-Assessment (DSA). The district is required to complete the DSA internally. The District Self-Assessment Summary is due on: **8/3/2025**.

To upload the District Self-Assessment Summary, click the **Choose File** button, select the District Self-Assessment Summary document, and then click **Upload**.

District Self-Assessment Summary

Choose File

 No file chosen

Upload





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