



California
Department of
Health Services

SANDRA SHEWRY
Director

State of California—Health and Human Services Agency
Department of Health Services



ARNOLD SCHWARZENEGGER
Governor

June 1, 2006

PPL No. 06-009

TO: Local Educational Consortia and
Local Governmental Agency Coordinators for
School-Based Medi-Cal Administrative Activities

SUBJECT: **SUPPLEMENTAL WORKSHEET AND REQUIREMENTS FOR
QUARTER AVERAGING**

This Policy and Procedure Letter (PPL) is to notify the Local Educational Consortia (LEC), Local Governmental Agencies (LGA), and Local Educational Agencies (LEA) of the requirements for the enclosed supplemental averaging worksheets.

If a claiming unit chooses to average a particular quarter, they must submit with their invoice a Quarter Averaging Worksheet. Enter the number of participants and total hours for each activity code in the worksheet and it will automatically calculate the average.

Additionally, all claiming units are required to complete the Time Survey Summary Worksheet, entering individual participants' time survey data as shown in the enclosed example. The Time Survey Summary worksheet must be kept onsite in the operational plan. **These supplemental averaging worksheets are a requirement for invoices submitted beginning fiscal year 2005/2006 First Quarter.**

- **Averaging:** Applies only if all the participants time survey three quarters in that fiscal year. The LEA can average the time survey results of any quarter in a fiscal year. The averaging quarter cannot be chosen after time surveys are completed. Completed surveys must be used for that quarter. Please refer to PPL No. 05-008 regarding averaging.

How to Average:

1. Identify those positions that participated in each of the three quarters time surveyed during the fiscal year.

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2. Compile the time survey results for each of the positions identified by Activity Code for each of the three quarters to arrive at a new recalculated time survey percentage.
3. The recalculated percentages should be added together and divided by three. This will give you the averaged quarter averaging percentage.
4. Be sure to make your calculations clear and well documented in the event of an audit or site visit.
5. If a Claiming Unit, wishes to claim for a position that did not time survey all three quarters, the position must participate in a separate time survey quarter. Those results are included separately on the invoice, tab 1 – Survey Medi-Cal %, Column D – survey results percentages.

If you have any questions concerning this PPL, please contact your School-Based MAA Analyst or Ms. Barbara Schultz, Chief of the School-Based MAA Unit, at (916) 552-9616 or by email at BSchultz@dhs.ca.gov.

Sincerely,

Original Signed by Elizabeth Touhey

Elizabeth Touhey, Acting Chief
Medi-Cal Benefits Branch

Enclosures

cc: Ms. Cathleen Gentry
MAA/TCM Consultant
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