

CMAA

Claiming Plan Training

HANDOUTS

- Handouts were emailed to all LGA Coordinators
- Appendix H – Comprehensive Claiming Unit Grid
- Appendix I – Claiming Unit Function Grid
- Appendix J – Activity Sheets
- Appendix K - Duty Statement
- Appendix L – SPMP Questionnaire
- Code 19 example

The CMAA Claiming Plan

- An LGA must have a comprehensive CMAA claiming plan for each claiming unit that performs MAA.
- An LGA's approved CMAA claiming plan is required for claiming reimbursement through the CMAA program.

CMAA CLAIMING PLAN DOCUMENTS

Existing LGAs are only required to submit specific portions of the CMAA claiming plan documents to DHCS on an ongoing basis:

- The LGA Comprehensive Claiming Unit Grid (CCUG).
- The LGA Claiming Unit Functions Grid (CUFG).
- Code 19 Justification on Letterhead, if applicable

CMAA CLAIMING PLAN DOCUMENTS

LGAs participating in the CMAA program for the first time will be required to submit all claiming plan documents to DHCS.

- Verify correct version of templates (see DHCS website for most current template).

THE LGA COMPREHENSIVE CLAIMING UNIT GRID (CCUG)

- Specific to each individual LGA.
- Provides a listing of all active claiming units.
- Identifies the time survey frequency or indicates that the entire claiming unit direct charges.

CCUG SUBMISSION REQUIREMENTS

- Submit to DHCS prior to the beginning of the new quarter:
 - Q1 – by June 30
 - Q2 – by Sept 30
 - Q3 – by Dec 31
 - Q4 – by Mar 31
- When updating, adding, deleting a claiming unit.
- When increasing or decreasing the time survey frequency.
- When changing from direct charge to time survey (or vice versa).

CCUG SUBMISSION REQUIREMENTS

(CONT.)

- Signed and certified by the LGA MAA Coordinator.
- Must have an accompanying Claiming Unit Functions Grid for each claiming unit.
- Must agree with claims submitted to DHCS:
 - Changes made during or after the claiming quarter has begun must not be included in the quarterly invoice.
 - Claims that do not agree with the CCUG will be rejected.

The LGA Claiming Unit Functions Grid (CUFG)

1. Specific to each individual claiming unit.
2. Provides a listing of:
 - Employee classifications that participate in MAA.
 - Number of participants in each employee classification.
 - MAA activities that are performed by each classification.
 - Employee classifications designated as Skilled Professional Medical Personnel (SPMP) for enhanced reimbursement.
 - Employee classifications designated to Direct Charge.

The LGA Claiming Unit Functions Grid (CUFG) (Cont.)

- Name of Claiming Unit
- Total staff listed on the Grid
- Submittal Date: FY and Quarter (e.g. FY 15/16 Q1)
 - Do NOT list the date of actual submission
- Contact Person: LGA Coordinator

The LGA Claiming Unit Functions Grid (CUFG) Submission Requirements

1. When adding, deleting, or changing number of staff.
 - This may affect the time survey frequency (5, 10, 20, perpetual, direct charge).
2. When staff job classification changes.
3. When making MAA code changes.
4. When making SPMP, non-SPMP, or Direct Charge changes.

The LGA Claiming Unit Functions Grid Submission Requirements(Cont.)

- Must be signed and dated by the LGA MAA Coordinator.
- Must also be submitted with the CCUG.
- Must agree with CCUG.
- Must agree with claims submitted to DHCS.
 - Changes made during or after the claiming quarter has begun must not be included in the quarterly invoice.
 - Claims that do not agree with the CUFG will be rejected.

CCUG and CUFG

- All CCUGs and CUFGs must be submitted by hard copy and postmarked before start of quarter
- After DHCS review:
 - If documents need correction, CMAA analyst will contact LGA Coordinator.
 - If approved, CMAA analyst will sign and email a scanned copy to LGA Coordinator.

ELIGIBLE CMAA PARTICIPANTS

JOB CLASSIFICATIONS

To establish and confirm participant eligibility an LGA must:

- Identify eligible participants to direct charge or time survey
- Identify each employee that performs the MAA
- Ensure the employee duty statement reflects all MAA
- Establish a list of eligible participants for each claiming period prior to the start of the claiming period in CUFG.

ELIGIBLE CMAA PARTICIPANTS

- Any direct employee of the LGA
- Personal Services Contractor
- Contract employee
- Subcontractor employee
- Part-time employee
- Temporary employee

INELIGIBLE CMAA PARTICIPANTS

- Volunteers who receive no compensation for their work.
- Staff positions funded 100% by non-allowable matching fund federal dollars.

ELIGIBLE STAFF ACTIVITIES

- Medi-Cal Outreach
- Referral, Coordination and Monitoring of Medi-Cal Services
- Facilitating Medi-Cal Application
- Arranging and/or Providing Non-Emergency, Non-Medical Transportation
- Contract Administration for Medi-Cal Services
- Program Planning, Policy Development
- MAA/TCM Coordination and Claims Administration
- MAA/TCM Implementation Training

DUTY STATEMENTS

- Not submitted to DHCS, kept in audit file.
- A description of all job functions and responsibilities staff in a specific classification perform.
- Functions and responsibilities specific to the performance of MAA.
- The MAA must be identified by placing the designated activity code number next to each related activity.
- Must include an employee signature.
- If activity or classification is changed, Duty Statement must be updated, signed and dated.

SKILLED PROFESSIONAL MEDICAL PERSONNEL (SPMP) QUESTIONNAIRE

- Not submitted to DHCS, kept in audit file.
- Required when MAA claiming includes expenditures for staff designated as SPMP (Codes 16 and 18).
- One SPMP Questionnaire for each qualified SPMP staff member.
- Validates SPMP status for MAA claiming.

SKILLED PROFESSIONAL MEDICAL PERSONNEL (SPMP) QUESTIONNAIRE (CONT.)

Supporting documentation for SPMPs, as applicable:

- A copy of the SPMPs license
 - Indicates the license type, number, and issuing state
- A copy of the SPMPs educational degree
- A copy of the SPMPs Curriculum Vitae (C.V.) (if available)
- A copy of the SPMPs certification or registration by a health or health-related national or California certifying organization (if applicable)
- Employee's Signature
- Supervisor's signature
- LGA Coordinator's signature verifying SPMP eligibility

LGA ACTIVITY CODE SHEETS

- Do not submit; keep in audit file
- For each activity on CUFG per Claiming Unit
- The information includes, but is not limited to:
 - A description of the MAA and how it will be performed
 - The intended target population
 - The length of time the MAA may take
 - The location where the MAA will be performed
 - How frequently the MAA will be performed
 - Description of how the MAA costs will be developed
 - Names of subcontractors who will be performing MAA

CMAA REIMBURSEMENT FOR CBOs

- CBOs are only reimbursed at **non-enhanced** rate (50%).
- CBOs may not claim for Contract Administration.
- CBOs may only claim for “support activities” under Program Planning and Policy Development (PP&PD), such as:
 - Developing Resource Directories
 - Preparing Medi-Cal Data Reports
 - Conducting Needs Assessments
 - Preparing Proposals for expansion of Medi-Cal services

MAA/TCM COORDINATION AND CLAIMS ADMINISTRATION CODE 19

- Only 1 full time equivalent (FTE) may claim to Code 19 per claiming unit.
- Code 19 justifications must be submitted when more than one person claims to code 19.
 - The total of claimable time under Code 19 is still limited to 1 FTE.
- MAA/TCM Claiming Coordination Units who solely direct charge may have multiple FTE staff who claim to code 19.
- Justifications must be submitted on LGA letterhead prior to beginning of quarter.

OTHER NON-FINANCIAL DOCUMENTATION IN AUDIT FILE

- Not submitted to DHCS, kept in audit file
- See audit file checklist on DHCS website
- Includes, but not limited to:
 - Organization Chart
 - Examples of MAA (e.g. flyers, agenda, contracts)
 - Time Surveys

RESOURCES

Department of Health Care Services website:

www.dhcs.ca.gov

CMAA website:

www.dhcs.ca.gov/provgovpart/Pages/CMAA.aspx

TCM website:

www.dhcs.ca.gov/provgovpart/Pages/TCM.aspx

LGA Consortium website:

www.maa-tcm.com

Questions?

