

**Local Education Agency Medi-Cal Billing Option Program  
Ad Hoc Workgroup Meeting  
February 1, 2012 Meeting Minutes**

**Location:** Natomas Unified School District (USD)

1.	Geri Baucom	DHCS, Safety Net Financing Division (SNFD)
2.	Rick Record	DHCS, SNFD
3.	Cheryl Ward	DHCS, SNFD
4.	Angelia Johnson	DHCS, SNFD
5.	Martin Alvarez	DHCS, A&I Financial Audits Branch (FAB)
6.	Alan Eng	DHCS, A&I FAB
7.	Debbie Lee	DHCS, A&I FAB
8.	Anysia Drumheller	Butte COE
9.	Michelle Cowart	Contra Costa COE
10.	Lisa Chaney	Fresno COE
11.	Diane Torna	Fresno USD
12.	Roni Tunick	Los Angeles COE
13.	Sherry Purcell	Los Angeles USD
14.	Margie Bobe	Los Angeles USD
15.	Laura Baynham	Mendocino COE
16.	Jeremy Ford	Oakland USD
17.	Cathy Bennett	Sacramento City USD
18.	Marlene Burruel	San Joaquin COE
19.	Greg Englar	Sonoma COE
20.	Kevin Harris	Navigant Consulting, Inc.
21.	Gloria Eng	Navigant Consulting, Inc.
22.	Kerry Chang	Navigant Consulting, Inc.

**Handouts**

Each participant was e-mailed an electronic copy of the Workgroup Meeting Agenda, December 2011 Meeting Minutes, and February DHCS Status Update Summary. A copy of the LEA Workgroup Breakout Group Instructions, LEA Service Type Summary and Observations for Potentially Underutilizing LEA Services was passed out to Workgroup members.

**Purpose**

The meeting was convened by DHCS. The purpose of the Workgroup is to improve the Local Educational Agency (LEA) Program. The emphasis of the meeting is to strategize various goals and activities aimed at enhancing the Medi-Cal services provided on school sites and access by students to these services, while increasing federal reimbursement to LEAs for the cost of providing these services.

**Review of Meeting Minutes**

The Workgroup reviewed the minutes and the December meeting minutes were approved as written. The minutes will be posted on the LEA Program website.

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**DHCS SNFD Update Summary**

***LEA Webinar Training – PPA/Annual Report Issues***

- An upcoming special training session will focus on the Provider Participation Agreement (PPA)/Annual Report process and will emphasize key issues including requirements for an interagency collaborative, authorized signers and the new suspension process. A tentative date of 5/9/12 has been reserved.

***PPA/Annual Report Process***

- DHCS has received 165 PPA/Annual Reports to date. Of these, 73 have been accepted and 92 require corrections.
- Planned PPA/Annual Report Updates:
  - Include CDS Code on Provider Enrollment Sheet
  - Change title of Attachment 1B to *Certification of State Matching Funds for LEA Services for Prior Year Funding*
  - Change Attachment 2A to *Interagency Collaborative* and explain interagency requirements for collaborative members
  - Include a billing consortium page for multiple LEAs claiming under the same NPI
  - Instructions for authorized signers to list 1<sup>st</sup> signer as Superintendent or Assistant Superintendent and 2<sup>nd</sup> signer as Superintendent, Assistant Superintendent, Business Official or Fiscal Officer. (and/or functional equivalent)
- Inter-Agency Collaborative: Safety Net Financing Division (SNFD) is in the process of reviewing PPA/Annual Reports to evaluate the LEA collaborative requirements and determine if acceptable.

***Electronic Claims Submissions***

- Authorized Signers: SNFD is developing a process for Affiliated Computer Systems (ACS) to review authorized signers and to establish acceptable classifications based on “functional equivalent”.

***Reimbursement Reports***

- FY 2011/12 will be the last year SNFD will generate Interim Reimbursement and Units of Service (IRUS) reports.
- New reports will be generated and posted on website for LEAs to download. The quarterly report format will be similar to an IRUS report and based on date of service (DOS).
- The first report generated cannot be generated until after 9/30/12 due to the one year claims run-out.

***LEA Website***

- The landing page has been restructured to allow for easier navigating. It includes a *Getting Started* link with instructions on how to enroll as an LEA provider and quick links to required documents.

***Notification Letter regarding the Ad Hoc Workgroup Review and Approval Process for Policy and Procedure Letters (PPLs)***

- Notification letter was disseminated to LEAs on 1/3/12 and is currently under revision.

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**SACS Code 5640 PPL**

- PPL is ready for submittal to Ad Hoc Workgroup for review pending the approval of the PPL review and approval process.

**LEA Suspension Process PPL**

- Draft PPL awaiting internal approval for submittal to Ad Hoc Workgroup for review.

**SPA 05-010 PPL**

- SPA 05-010 was approved on 12/16/11. The new policy will be effective when SNFD issues the PPL to LEAs.
- Draft PPL awaiting internal approval for submittal to Ad Hoc Workgroup for review.

**2010 LEA Annual Legislative Report**

- Submitted to executive management review for final approval. Once approved by all State parties, the report will be posted on the LEA website.

**Development of Target Lists**

- CDE has provided an updated list of County and District Superintendents.
- DHCS is researching to obtain a list of LECs that are SMAA but not participating in the LEA Billing Option Program.
- CDE is researching to provide a list of School Districts without Special Education Programs.
- PED and FI-COD are researching to provide the LEA Provider Extract including legacy number.

**Audits & Investigations Updates (A&I)**

**A&I Audits**

- A&I is sending some 15-day exit letters or audit reports to LEAs this week. A&I will be sending hard copies to the physical address of the LEA and electronic copies via email.

**CRCS**

- NCI presented slides of the CRCS net overpayment/underpayment distributions for FYs 2006/07, 2007/08 and 2008/09 for accepted CRCS reports.
- SNFD, A&I, NCI and the co-chairs are scheduled to have a CRCS meeting on February 9, 2012 to discuss the CRCS process, form flow and issues identified by LEAs.

**LEA Program Outreach**

- NCI discussed the paid claims analysis work conducted to determine service type volumes by LEA
- For the analysis, service types include: 1) assessments, 2) speech therapy/audiology treatment, 3) psychology/counseling treatment, 4) physical therapy treatment, 5) occupational therapy treatment, 6) RN/LVN treatment, 7) trained health care aide treatment, 8) targeted case management, and 9) transportation
- In FY 2009/10, 37 percent of the participating LEAs only billed 1, 2 or 3 service types

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**Workgroup Breakout Sessions**

The goal of the Workgroup breakout sessions is to break into smaller groups during the Workgroup meetings to brainstorm challenges and barriers, and use the combined expertise to provide guidance to DHCS and suggest planning and solutions.

Workgroup members split into four groups to discuss: 1) PPA/Annual Report barriers and streamlining and 2) Non-participating district outreach planning for 2012. Each group was provided a flip chart and pens to document their problem statement, issue and solutions. The groups then presented their statements and recommendations to the larger group. SNFD will review the information and prepare responses.

**LEA Service Documentation**

The Workgroup briefly discussed the service documentation requirements for psychology and counseling. The Workgroup discussed that each practitioner type has professional board standards that practitioners should adhere to when documenting services. This may entail having two sets of documentation records, one for Medi-Cal billing and another for student records.

**CMS Rule 6028 and 5010 File Format**

The Workgroup requested that SNFD research the requirements of CMS Rule 6028 and the 5010 file format to determine the impact for LEAs.

**Next Meeting**

Wednesday, April 4, 2012 10:30am-3:00 pm at Natomas USD