

MEDICAID ADMINISTRATIVE CLAIMING in Oregon

Center for Prevention & Health Promotion
Oregon Health Authority
8/28/2017

Medicaid Administrative Claiming Is:

...a method of identifying and accounting for the time spent by staff of school districts, educational service districts (ESDs), home visiting providers, and health departments on activities that generally connect clients eligible for Medicaid with Medicaid-covered services.

In cases where these employees perform administrative activities that directly support the Medicaid program, some or all of the costs of these activities may be reimbursable when an appropriate claiming mechanism is used.

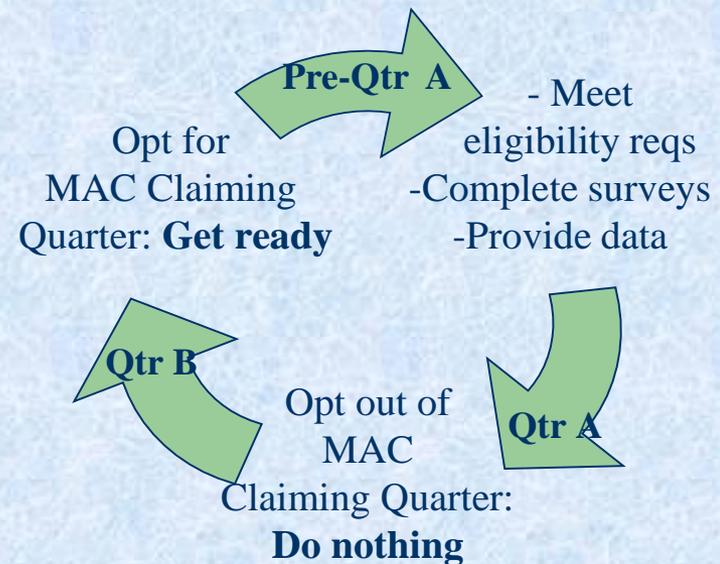
The time study is the primary mechanism for identifying and categorizing Medicaid administrative activities performed by eligible employees. The time study also serves as the basis for developing claims for the costs of administrative activities that may be properly reimbursed under Medicaid.

Status of Public Health Medicaid Administrative Claiming in Oregon (8/2017)

- Currently 22 counties and one health district participating in Public Health MAC.
- LHDs are claiming a range of percentages of their surveyed times as MAC claimable—between 15-45%.
- Most LHDs are claiming in range of 20-25%.
- Average claim for a given quarter is \$32,000.
 - ❖ Net revenue per quarter = \$16,000. (Three LHDs are regularly netting \$ 25,000 or more per quarter.)

Participation in MAC is voluntary...

- An agency having an active intergovernmental agreement with the State Department of Human Resources may opt in or out of participation at any time, but...
- Participation requires following certain rules and procedures in order for the MAC claim for a quarter to be valid.



What data are collected for MAC (quarterly)?

- Number of hours of paid time for identified employees who typically engage in Medicaid-supportive activities. (Time study survey)
- Percentage of that time that is spent carrying out those activities, according to four basic types:
 - Outreach and application assistance
 - Referral and case coordination
 - Translation and transportation
 - System coordination
- Salaries and benefits paid to these employees (actual)
- Portion of s & b that is non-federal (actual)
- Percentage of clientele that is Medicaid-eligible (estimate)

Data in red are based on survey results, logged into the MESD system within four days of survey date.

Underlined data are derived by each LHD from their records and sent to OHA after the end of the completed MAC quarter.

Start-of-Quarter Cost Pool Info for each employee designated by LHD to take surveys for quarter (submitted by LHD to MESD)

- Name
- ID# (assigned by LHD)
- FTE
- Position title

Eligibility of employee is determined by MAC-trained status (must have completed training/re-training within previous 9 months).

End-of-Quarter Cost Pool Report

(submitted by LHD to MESD)

			Allowable (Non-fed)		
	ID #	FTE	Salary	Benefits	Total s&b
Employee name					
GRAND TOTAL					S & B

Time Study Surveys are basis for deriving a percentage of “MAC-Claimable” time

- Strategy of random moment sampling using time study done quarterly
- Random day selection:
 - 4 days are selected for each quarter by OHA using random number table
 - LHDs are notified of an upcoming MAC survey date one week before the date
 - Cost pool staff complete online surveys on **all** of the 4 days
- Each staff in cost pool must have all paid time accounted for, on every survey day

MAC Survey

How it Works

- Individual employee does on-line survey four days per survey period.
- Survey dates are randomly selected by DHS.
- Paid time at work is surveyed in 15-minute increments.
- Staff time falls into any one of ten activity codes.
- Predominant portion of a 15-minute increment is what's recorded.



- Activity**
- [A1. Outreach / Application Assist. For Medicaid](#)
 - [A2. Outreach / Application Assist. For Non-Medicaid](#)
 - [B1. Referral, Coordination, Monitoring and Training of Medicaid Services](#)
 - [B2. Referral, Coordination, Monitoring and Training of Non-Medicaid Services](#)
 - [C1. Medicaid / OHP Transportation/Translation](#)
 - [C2. Non-Medicaid / OHP Transportation/Translation](#)
 - [D1. System Coordination Related to Medicaid Services](#)
 - [D2. System Coordination Related to Non-Medicaid Services](#)
 - [E. Direct Health Care Services](#)
 - [F. Other Work Activities](#)

Time

- 7:00 - 7:15 am
- 7:15 - 7:30 am
- 7:30 - 7:45 am
- 7:45 - 8:00 am
- 8:00 - 8:15 am
- 8:15 - 8:30 am
- 8:30 - 8:45 am
- 8:45 - 9:00 am
- 9:00 - 9:15 am
- 9:15 - 9:30 am

Clear Time

Save Survey

Retrieve Previous Answers

Time	A1	A2	B1	B2	C1	C2	D1	D2	E	F	
7:00 - 7:15 am	<input type="radio"/>	Select Activity Description									
7:15 - 7:30 am	<input type="radio"/>	Select Activity Description									
7:30 - 7:45 am	<input type="radio"/>	Select Activity Description									
7:45 - 8:00 am	<input type="radio"/>	Select Activity Description									
8:00 - 8:15 am	<input type="radio"/>	Select Activity Description									
8:15 - 8:30 am	<input type="radio"/>	Select Activity Description									
8:30 - 8:45 am	<input type="radio"/>	Select Activity Description									
8:45 - 9:00 am	<input type="radio"/>	Select Activity Description									
9:00 - 9:15 am	<input type="radio"/>	Select Activity Description									
9:15 - 9:30 am	<input type="radio"/>	Select Activity Description									
9:30 - 9:45 am	<input type="radio"/>	Select Activity Description									
9:45 - 10:00 am	<input type="radio"/>	Select Activity Description									
10:00 - 10:15 am	<input type="radio"/>	Select Activity Description									
10:15 - 10:30 am	<input type="radio"/>	Select Activity Description									
10:30 - 10:45 am	<input type="radio"/>	Select Activity Description									
10:45 - 11:00 am	<input type="radio"/>	Select Activity Description									
11:00 - 11:15 am	<input type="radio"/>	Select Activity Description									
11:15 - 11:30 am	<input type="radio"/>	Select Activity Description									
11:30 - 11:45 am	<input type="radio"/>	Select Activity Description									
11:45 - 12:00 pm	<input type="radio"/>	Select Activity Description									
12:00 - 12:15 pm	<input type="radio"/>	Select Activity Description									
12:15 - 12:30 pm	<input type="radio"/>	Select Activity Description									
12:30 - 12:45 pm	<input type="radio"/>	Select Activity Description									
12:45 - 1:00 pm	<input type="radio"/>	Select Activity Description									
1:00 - 1:15 pm	<input type="radio"/>	Select Activity Description									
1:15 - 1:30 pm	<input type="radio"/>	Select Activity Description									
1:30 - 1:45 pm	<input type="radio"/>	Select Activity Description									
1:45 - 2:00 pm	<input type="radio"/>	Select Activity Description									
2:00 - 2:15 pm	<input type="radio"/>	Select Activity Description									

Time	A1	A2
7:00 - 7:15 am	<input type="radio"/>	<input type="radio"/>
7:15 - 7:30 am	<input type="radio"/>	<input type="radio"/>
7:30 - 7:45 am	<input type="radio"/>	<input type="radio"/>
7:45 - 8:00 am	<input type="radio"/>	<input type="radio"/>
8:00 - 8:15 am	<input type="radio"/>	<input type="radio"/>
8:15 - 8:30 am	<input type="radio"/>	<input type="radio"/>
8:30 - 8:45 am	<input type="radio"/>	<input type="radio"/>
8:45 - 9:00 am	<input type="radio"/>	<input type="radio"/>
9:00 - 9:15 am	<input type="radio"/>	<input type="radio"/>
9:15 - 9:30 am	<input type="radio"/>	<input type="radio"/>
9:30 - 9:45 am	<input type="radio"/>	<input type="radio"/>
9:45 - 10:00 am	<input type="radio"/>	<input type="radio"/>
10:00 - 10:15 am	<input type="radio"/>	<input type="radio"/>
10:15 - 10:30 am	<input type="radio"/>	<input type="radio"/>
10:30 - 10:45 am	<input type="radio"/>	<input type="radio"/>
10:45 - 11:00 am	<input type="radio"/>	<input type="radio"/>
11:00 - 11:15 am	<input type="radio"/>	<input type="radio"/>
11:15 - 11:30 am	<input type="radio"/>	<input type="radio"/>
11:30 - 11:45 am	<input type="radio"/>	<input type="radio"/>
11:45 - 12:00 pm	<input type="radio"/>	<input type="radio"/>
12:00 - 12:15 pm	<input type="radio"/>	<input type="radio"/>

Code A1

Outreach and Application Assistance for the Medicaid Program

Summary:

Interviews, group meetings, phone contacts or home visits that inform Medicaid eligible and potential Medicaid eligible individuals and their families about the benefits and availability of services provided by the Medicaid program. Additionally informing individuals and their families on how to access, use and maintain participation in all health care resources (ie Medicaid, Early Periodic Screening and Diagnostic Testing, etc), creating and/or disseminating materials to inform children and families about Medicaid and assisting them to make application for Medicaid eligibility (ie collecting information for the Medicaid application, helping to complete necessary forms for the Medicaid application, and updating of forms as necessary if a child or family's circumstances change), related staff travel and paperwork.

Examples:

- Informing clients and others about the OHP/Medicaid program and referring them to the Department of Human Services, the local branch office or other outreach facility to make application;
- Date stamping and handing out OHP applications to clients.
- Providing information regarding Medicaid managed care programs and health plans to individuals and families and how to access that system.
- Confirming or verifying with DHS an individual's current Medicaid eligibility status;
- Explaining Medicaid eligibility rules and the Medicaid eligibility process to prospective applicants.
- Assisting an applicant to fill out a Medicaid eligibility application.
- Gathering information related to the application and eligibility determination for an individual, including resource information and third party insurance coverage information, as a prelude to submitting a formal Medicaid application.
- Providing necessary forms and packaging all forms in preparation for the Medicaid eligibility determination.
- Providing translation for Medicaid outreach and application assistance.
- Informing individuals and their families about the availability of Medicaid services, such as preventive, treatment, and screening including services provided through the Early and Periodic Screening Diagnosis and Treatment Program (EPSDT) mental health, addictions treatment.
- Assisting in early identification of people who could benefit from the health services provided by Medicaid.
- Informing individuals and their families how to effectively use and maintain participation in all health resources under the Medicaid program.
- Contacting pregnant and parenting teenagers about the availability of Medicaid prenatal, and well baby care programs and services.
- Conducting a health education outreach program or campaign if it is targeted specifically to Medicaid-covered services (family planning, prenatal care, immunizations, etc.).
- Promote consistent on-going infant toddler immunizations and well-child checks.

Developing The Claim Formula for Reimbursement

$$\begin{aligned} & \text{Cost Pool (provided locally)} \\ & \quad \times \\ & \quad \% \text{ of allowable time (time study)} \\ & \quad \quad \times \\ & \quad \quad \% \text{ of Medicaid eligible (local estimate)} \\ & \quad \quad \quad = \text{Total Claim} \\ & \quad \quad \quad \quad \times \\ & \quad \quad \quad \quad 50\% \text{ non-federal match} \\ & \quad \quad \quad \quad = \text{Net revenue} \end{aligned}$$



MAC: How it works

1. Local health dept identifies appropriate staff to be in cost pool.



2. Cost pool members are trained in MAC.

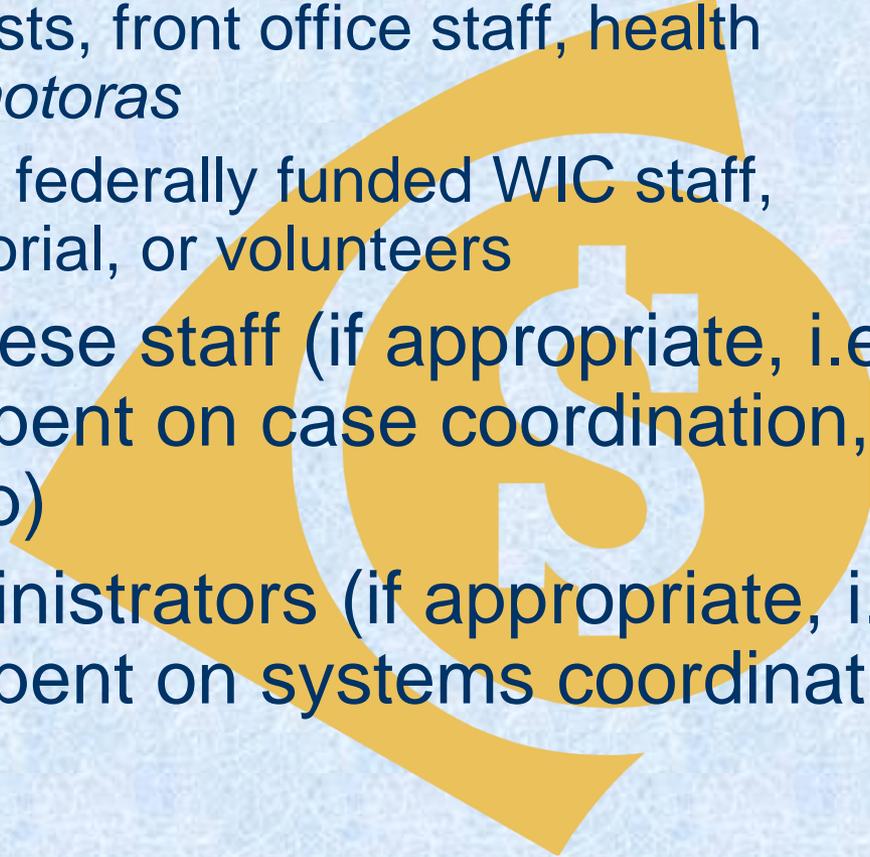
3. Certification of trainees sent to MESD.

4. Before start of a quarter, list of those trained cost pool members who will be in that quarter's cost pool is sent to MESD.

5. During quarter, all cost pool members participate in four random MAC survey dates.

6. At end of quarter, fiscal manager calculates total salary & benefits paid to cost pool during quarter.	\$ 120,000
7. Fiscal manager subtracts portion of this figure that is paid out of federal sources.	<u>- 20,000</u>
	\$ 100,000
8. Total non-fed salary & benefits for cost pool is reported to MESD, along with % of LHD's clientele that is Medicaid-eligible (50-70%).	X 25%
	=
9. MESD calculates average amount of time spent by cost pool in claimable activities during quarter (from survey data), applies to total cost pool pay, then times M/E %.	\$25,000
	X 66%
	=
10. Resulting dollar figure is LHD's claim for the quarter.	<u>\$ 16,500</u>

Cost Pool

- Those having routine contact with children and families
 - Nurses, community health workers, interpreters, eligibility specialists, front office staff, health educators / *promotoras*
 - Does not include federally funded WIC staff, sanitarians, janitorial, or volunteers
 - Supervisors of these staff (if appropriate, i.e. significant time spent on case coordination, providing back up)
 - Department administrators (if appropriate, i.e. significant time spent on systems coordination)
- 

Ten Activity Codes

- **A1. Outreach and application assistance for Medicaid/OHP Program**
- **A2. Outreach and Application assistance for non-Medicaid/OHP Outreach**
- **B1. Referral, Coordination, Monitoring and Training of Medicaid services**
- **B2. Referral, Coordination, Monitoring and Training of Non-Medicaid Services**
- **C1. Medicaid/OHP Transportation and Translation**
- **C2. Non-Medicaid/OHP Transportation and Translation**
- **D1. System Coordination related to OHP services.**
- **D2. System Coordination related to Non-OHP services.**
- **E. Direct Health Care Services.**
- **F. Other work activities**

Documentation for Positive MAC codes

A1: Outreach and Application Assistance for the Medicaid Program

- **A1.1** Conducted individual or group session to inform potentially Medicaid eligible individuals about the benefits and availability of services provided by the Medicaid program.
- **A1.2** Informed a person on how to effectively access, use, and maintain participation in Medicaid/OHP-covered health care resources. (Includes describing the range of services, and distributing OHP literature)
- **A1.3** Created and/or disseminated materials to inform individuals or families about Medicaid
- **A1.4** Assisted a person on how to access, apply for and/or complete the Medicaid/OHP application (includes transportation and translation related to the application and gathering appropriate information)
- **A1.5** Checked a person's OHP status
- **A1.6** Contacted a pregnant woman or parent about the availability of Medicaid/OHP for prenatal and well baby care programs
- **A1.7** Staff travel or paperwork related to outreach and application assistance for the Medicaid program.

Documentation for Positive MAC codes

B1: Referral, Coordination, Monitoring and Training of Medicaid Services

- **B1.1** Referred a person for medical, mental health, dental health and substance abuse evaluations and services covered by Medicaid/OHP.
- **B1.2** Coordinated the delivery of medical health, mental health, dental health and substance abuse services covered by Medicaid/OHP. (Includes participation in multidisciplinary team meetings, conferencing on health, developmental issues, consultations, and preparing or presenting materials for case review)
- **B1.3** Monitored the delivery of medical (Medicaid/OHP) covered services.
- **B1.4** Participated in, coordinated or conducted a training on Medicaid Administrative Claiming.
- **B1.5** Staff travel or paperwork related to Referral, Coordination, Monitoring and Training of Medicaid Services.

Code B-2: Referral, Coordination, Monitoring and Training of Non-Medicaid Services

- ✓ Case planning for non-Medicaid/OHP services
- ✓ Coordinating and monitoring educational, vocational, and social services of family plan
- ✓ General health, weight loss
- ✓ Training on these type programs
- ✓ Referral to WIC, food banks, TANF, energy assistance

Documentation for Positive MAC codes

C1: Medicaid/OHP Transportation and Translation

- **C1.1** Scheduled, arranged or provided transportation to OHP covered services (not as part of the direct services billing for transportation)
- **C1.2** Scheduled, arranged or provided translation for OHP covered services (translation for access to or understanding necessary care and treatment)
- **C1.3** Staff travel or paperwork related to Medicaid/OHP transportation and translation

Code D-1: System Coordination Related to OHP Services

- ✓ Working internally and with other agencies to improve OHP services
- ✓ Identifying gaps, duplications, overlaps of medical services
- ✓ Developing strategies to access or increase the capacity of medical, developmental, dental, mental health programs
- ✓ Interagency coordination to improve delivery of OHP services

Code D2: System Coordination Related to Non-OHP Services

- ✓ Working collaboratively with other agencies to identify gaps, overlaps or duplication of non-medical/health services, such as vocational, social or educational services
- ✓ Improving coordination and expanding access or delivery of non-Medicaid/OHP services
- ✓ Developing strategies to assess or increase the capacity of non-medical, dental and mental health programs

Code E: Direct Medical Services

- ✓ Targeted Case Management or Maternity Case Management Services
- ✓ Providing direct health/dental/mental health care services
- ✓ Conducting health/dental/mental health assessments/evaluations and diagnostic testing
- ✓ Administering first aid or prescribed injection or medication to an individual

Code F: Other Work Activities, or Any Other Paid Time

- ✓ All other job related activities that do not fall under one of the above categories
- ✓ Paid time off; vacation leave, sick leave; or any other paid time away from work



Survey Documentation Protocols

- In most cases, it is not necessary for staff to provide a written narrative account of an activity; documentation is in the form of a numeric system that associates an activity narrative with a number.
- MESD web survey system has the method for documenting built in to the survey
- **Exceptions:**
 - ✓ When an employee claims 50%+ of time worked as MAC, the Coordinator should note the reason for this and keep in a file.
 - ✓ When employees claim time spent attending meetings or trainings lasting for several hours, a record of the session should be on file which will document that the agenda item(s) during claimed time were claim-eligible.

QUESTIONS



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