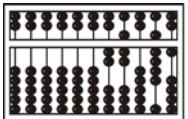


# Medicaid Cost Report

Using Preschool Software system to assist with completing the Medicaid  
Cost Report

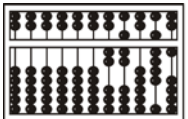


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# Framework

- ▶ IEP Ratio and Tuition Calculations
- ▶ Software changes for Tuition
- ▶ New version of Preschool
- ▶ Supplemental Reports
- ▶ BOCES



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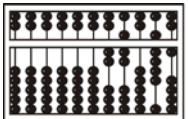
 **PORTAL**

The logo features the letters 'C', 'P', 'S', and 'E' each inside a small colored square (green, blue, yellow, and red respectively), followed by the word 'PORTAL' in a large, bold, black sans-serif font.

# Medicaid Alert 16-07

## IEP Ratio Methodology and Reporting Updates

- ▶ IEP Ratio denominator is “total number of students in the LEA with a direct medical service, as outlined in their IEP”
- ▶ Previously, this was
  - ▶ Calculated for you by BOCES
  - ▶ Based on a BEDS Day snapshot of your data
- ▶ Going forward
  - ▶ Must be supplied by you
  - ▶ Based on full school year of data

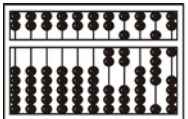


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# Students in the LEA with a Direct Medical Service as outlined in their IEP

- ▶ The SED Medicaid Website (<http://www.oms.nysed.gov/medicaid/>) lists the Direct Medical Service as OT, PT, ST, Psychological Counseling, Skilled Nursing, Psychological Evaluation, Medical Evaluation, Medical Specialist Evaluation, Audiological Evaluation
- ▶ For children with a Fee For Service Related Services that is a direct medical service (OT, PT, ST, etc.), are identified based on the existence of the related service enrollment
- ▶ For children in a center based tuition program we can only identify them if you indicate in the Preschool system that child has a direct medical service

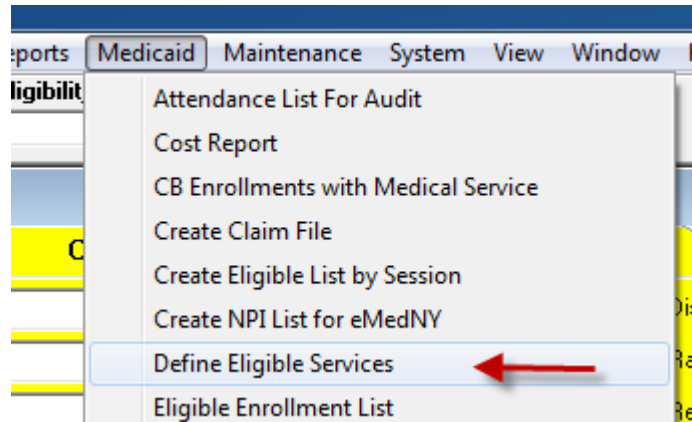


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# Defining Direct Medical Service in Preschool

- ▶ Using the top Menu bar in Preschool, Navigate to Medicaid->Define Eligible Services



Define Medicaid Eligible Services

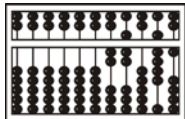
RS Service Types		
Service	Code	Medicaid Eligible
play therapy (OTH2)	OTH2	No
Audiology	AUD	No
Counseling	CSL	No
Occ. Therapy	OT	Yes
Physical Therapy	PT	Yes
Speech Therapy	ST	Yes
Visually Impaired Service	TVI	No
parent education training	CSL	No
Teacher of the Deaf	TDF	No
Orientation and Mobility	OM	No
Nursing	MED	No

Mark RS Service Type As  
Eligible  
Ineligible

Exit

EVAL Service Types		
Service	Code	Medicaid Eligible
Audiological	Aud	No
Education	Edu	No
Occupational Therapy	OT	No
Psychological	Psyc	No
Physical/Medical	PhMd	No
Physical Therapy	PT	No
Social	Soc	No
Speech/Language	SPL	No
Other (Physician)	OthP	No
Psychiatric	Psyi	No
Other (Non-Physician)	OthNP	No

Mark EVAL Service Type As  
Eligible  
Ineligible

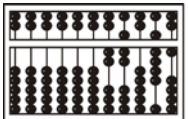


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# Indicating Direct Medical Service for Tuition Children

- ▶ Three options
  1. Enter the services from the IEP using the “RS in CB” screen
  2. Mark the tuition enrollment as having a Medicaid eligible service
  3. Make the very risky assumption that all center based children have a medical eligible service on their IEP
- ▶ We recommend using option 1, enter the services from the IEP
- ▶ Option 2 is a reasonable solution when used accurately
- ▶ We do not recommend option 3



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# Entering RS in CB services (aka CBRS)

Preschool (15-16 10 Month)

File Child / Services Payments Claims Providers eBilling Reports Medicaid Maintenance System View Window Help

Lookup Child **Current Child** **DOB** **Eligibility** **STAC ID** **Current Sess.** **CB**

ADCOCK, MALCOLM 11/1/2011 07/01/14 - 08/31/16 F42773 15-16 10 Month CTrans

Child / Services

Child / STAC Info

Center Based

STAC 09/01/15-06/24/16 9160-CWSN SCHOOL 5HR INTEGRATED (27073) Program Weeks Actual We

Program CWSN SCHOOL 5HR INTEGRATED 9160 (57119) 40 40

Start Date End Date Termination Date

09/01/2015 06/24/2016 MM/DD/YYYY

☒ 1:1 Aide? ☒ RS in CB ☒ Has Medicaid Medical Service on IEP

Program Maximum Hrs/Day Days/Wk

5 5

This Child 5 5

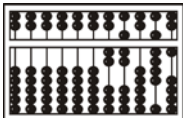
History

Program	Prg Wks	From	To	Term	Weeks	PFTE	FTE	Tuition	Rate	Hrs/Day	Days/Wk	Program Hou
CWSN SCHOOL 5HR	40	9/1/2015	6/24/2016		40		1	27,038.00	27038	5	5	5

RS Delivered As Part of Program

ServiceType	Ind/Grp	FromDate	ToDate	Times/Wk	Min/Sess	Timespan	Rx Start	Rx End	Rx Signed	Service At Home	ICD	Add New
Physical Therapy	I	09/01/15	06/24/16	2	30	Weekly	09/04/15	06/24/16	09/04/15	<input type="checkbox"/>	315	
Speech Therapy	I	09/01/15	06/24/16	2	30	Weekly	09/01/15	06/24/16	09/01/15	<input type="checkbox"/>	315	
Speech Therapy	G	09/01/15	06/24/16	1	30	Weekly	09/01/15	06/24/16	09/01/15	<input type="checkbox"/>	315	
Occ. Therapy	I	09/01/15	06/24/16	2	30	Weekly	09/04/15	06/24/16	09/04/15	<input type="checkbox"/>	315	
Social Work	I	09/01/15	06/24/16	1	60	Monthly				<input checked="" type="checkbox"/>		
*										<input type="checkbox"/>		

OK Cancel



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# How to tell if your County enters RS in CB

- ▶ If you are unsure of whether your county enters CBRS
  - ▶ Run the Enrollment Detail Listing Report (from top menu Reports->Enrollment Reports->Enrollment Detail Listing)
  - ▶ Run the report for just CB/RS service types
  - ▶ If there are only rows for Medicaid Children (CIN column), you probably only enter for Medicaid claiming which is insufficient

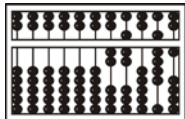
Enrollment Listing

Provider: (All Providers) Reload From: 09/01/15 To: 06/30/16

District: All Districts

Service type: ☐ CB ☐ SEIT ☒ CB/RS ☐ RS ☐ TRANS

Children											
	LastName	FirstName	DOB	Gender	CIN	Provider	ServiceType	ProgramName	Code	SC	FromD
	BOLLINGER	SERGIO	6/17/2011	M	EY20329Z	CWSN SCHOOL	CBRS-ST	CWSN SCHOOL 5HR	9100	I	3/21/20
	BOLLINGER	SERGIO	6/17/2011	M	EY20329Z	CWSN SCHOOL	CBRS-SOC	CWSN SCHOOL 5HR	9100	I	3/21/20
	BRINK	HERMAN	5/5/2012	M		CWSN SCHOOL	CBRS-PSY	CWSN SCHOOL 2.5HR	9165	I	9/1/20
	BRINK	HERMAN	5/5/2012	M		CWSN SCHOOL	CBRS-ST	CWSN SCHOOL 2.5HR	9165	I	9/1/20
	BRINK	HERMAN	5/5/2012	M		CWSN SCHOOL	CBRS-ST	CWSN SCHOOL 5HR	9160	I	2/29/20
	BRINK	HERMAN	5/5/2012	M		CWSN SCHOOL	CBRS-PSY	CWSN SCHOOL 5HR	9160	I	2/29/20



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# Marking the tuition enrollment as having a Medicaid eligible service

- ▶ In lieu of entering the related services in a tuition program from the IEP, you can also just indicate that the child has them
- ▶ On County Center Based enrollment screen, click the check box “Has Medicaid Medical Service on IEP”
- ▶ This is automatically updated when you enter RS in CB

Preschool (15-16 10 Month)

File Child / Services Payments Claims Providers eBilling Reports Medicaid Maintenance System View Window Help

Lookup Child **Current Child** **DOB** **Eligibility** **STAC ID** **Current Sess.** **CB**

ADCOCK, MALCOLM 11/1/2011 07/01/14 - 08/31/16 F42773 15-16 10 Month CTrans

Child / Services

Child / STAC Info

Center Based

RS / SEIT

Transportation

**Center Based**

STAC 09/01/15-06/24/16 9160-CWSN SCHOOL 5HR INTEGRATED (27073) Program Weeks Actual We

Program CWSN SCHOOL 5HR INTEGRATED 9160 (57119) 40 40

Start Date End Date Termination Date

09/01/2015 06/24/2016 MM/DD/YYYY

☒ 1:1 Aide? ☒ RS in CB ☒ Has Medicaid Medical Service on IEP

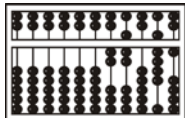
Program Maximum Hrs/Day Days/Wk

5 5

This Child 5 5

History

Program	Prg Wks	From	To	Term	Weeks	PFTE	FTE	Tuition	Rate	Hrs/Day	Days/Wk	Program Hou
CWSN SCHOOL 5HR	40	9/1/2015	6/24/2016		40		1	27,038.00	27038	5	5	5



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# Batch updates of “Has Medicaid Medical Service on IEP”

CB Enrollments with Medical Services On IEP

Session: 15-16 10 Month

Retrieve

Excel

Update from RS in CB

Mark All

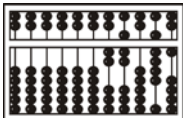
Un Mark All

Has Medical On IEP	Last Name	First Name	CIN	From Date	To Date
<input checked="" type="checkbox"/>	ACUNA	STAR	EV79428W	09/09/15	06/24/16
<input checked="" type="checkbox"/>	ADCOCK	MALCOLM	ES50143J	09/01/15	06/24/16
<input checked="" type="checkbox"/>	AHMAD	NORMAN		11/02/15	06/24/16
<input checked="" type="checkbox"/>	ALARCON	CARROLL	EV83836F	09/08/15	06/23/16
<input checked="" type="checkbox"/>	ALVES	VIRGIE	FQ22287U	11/09/15	06/24/16
<input checked="" type="checkbox"/>	ANDREW	DARRIN		09/09/15	06/24/16
<input checked="" type="checkbox"/>	ARTEAGA	EMILIO	EW70871S	09/09/15	06/23/16
<input checked="" type="checkbox"/>	ASHTON	WESLEY		10/13/15	06/24/16
<input checked="" type="checkbox"/>	ASHTON	WESLEY		09/09/15	10/05/15
<input checked="" type="checkbox"/>	ASKEW	SHANNAN		09/09/15	06/24/16
<input checked="" type="checkbox"/>	BARRAZA	RUTHIE		09/09/15	06/24/16
<input checked="" type="checkbox"/>	BAUGH	WILLARD	ER83237J	10/26/15	06/23/16
<input checked="" type="checkbox"/>	BEARDEN	GRADY	PD90384E	09/08/15	06/23/16
<input checked="" type="checkbox"/>	BELANGER	SOFIA	EZ18077J	09/09/15	06/23/16
<input checked="" type="checkbox"/>	BENNER	VELDA		10/13/15	06/24/16
<input checked="" type="checkbox"/>	BENNETT	LEESA	EX83409H	03/07/16	06/24/16
<input checked="" type="checkbox"/>	BIGELOW	CRAIG	EU78636R	11/09/15	06/23/16
<input checked="" type="checkbox"/>	BILLINGSLEY	VELVA		10/07/15	06/23/16
<input checked="" type="checkbox"/>	BIRCH	TOMIKA		09/09/15	06/24/16
<input checked="" type="checkbox"/>	BLAKELY	RANDY	EX50635T	11/09/15	06/23/16
<input checked="" type="checkbox"/>	BLANK	GARRETT	EV67180H	09/08/15	06/24/16
<input checked="" type="checkbox"/>	BOCK	HARLEY		09/08/15	06/23/16
<input checked="" type="checkbox"/>	BOLAND	VICTORIA		01/04/16	06/24/16
<input checked="" type="checkbox"/>	BOLLINGER	SERGIO	EY20329Z	03/21/16	06/24/16
<input checked="" type="checkbox"/>	BOLLINGER	SERGIO	EY20329Z	09/01/15	03/18/16

Medicaid Maintenance System View Window

- Attendance List For Audit
- Cost Report
- CB Enrollments with Medical Service
- Create Claim File

- ▶ Retrieve fills the grid
- ▶ Excel exports grid to Excel
- ▶ You can update the 1<sup>st</sup> column by clicking in the grid
- ▶ Update from RS in CB, will check the box for every CB enrollment that has corresponding CBRs that are Medicaid eligible
- ▶ Mark All will check the box for every row
- ▶ Un-Mark All will clear the box for every row

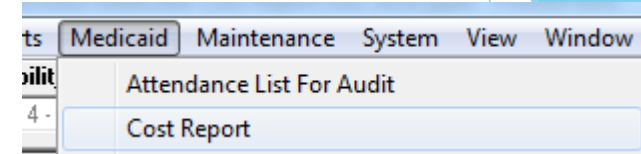
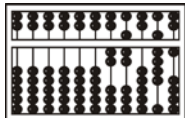


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# Medicaid Cost Report

- ▶ Using the top menu, navigate to Medicaid->Cost Report
- ▶ Enter your date range
- ▶ Choose the appropriate method for determining which tuition enrollments have a Direct Medical Service on their IEP. This method is used for both the IEP ratio as well as determining what tuition costs should be reported

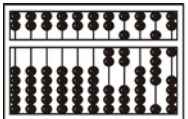
A screenshot of the 'Medicaid Cost Report' form. The form is divided into three main sections: 'Service Date Range', 'For Transportation', and 'For IEP Ratio and Tuition Costs'. The 'Service Date Range' section has 'From Date' set to 07/01/15 and 'To Date' set to 06/30/16. The 'For Transportation' section has two radio button options: 'All Transportation is Specialized Transportation Documented in IEP' (unselected) and 'Only consider enrollments marked as "Meets Medicaid Rules" to have Specialized Trans Documented in IEP' (selected). The 'For IEP Ratio and Tuition Costs' section has three radio button options: 'Use RS Included in CB entries to determine which Children have a direct Medical Service included in IEP' (selected), 'Assume All CB children have a direct Medical Service included in IEP' (unselected), and 'Use "Has Medicaid Medical Service on IEP" indicator to determine children' (unselected). A 'Run Report' button is located on the right side of the form.

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# Cost Report Results

- ▶ Annual Contractor Costs
  - ▶ List that can be exported to CSV and uploaded to PCG reporting site
- ▶ General and Statistical Information
  - ▶ IEP Ratio denominator
  - ▶ Transportation figures
- ▶ Annual Tuition costs
  - ▶ Need to be entered into PCG site
  - ▶ Need to omit BOCES
- ▶ IEP Ratio listing
  - ▶ You can export to Excel, the names of the children that are comprise the IEP Ratio Denominator



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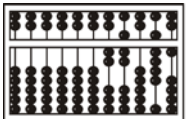
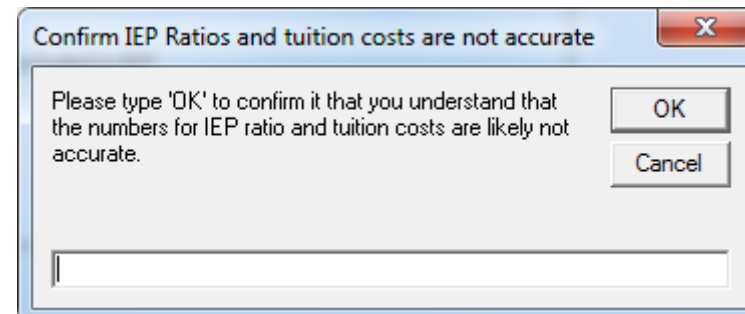
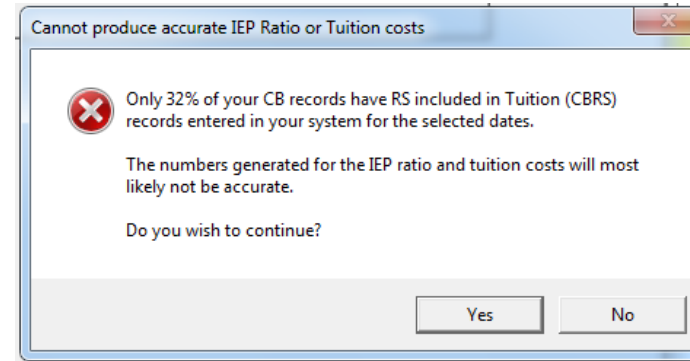
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# Warnings if not using CBRS

- ▶ If you select “Use RS Included in CB Entries to determine...” and the system notices that less than 50% of your CB tuition enrollments have corresponding CBRS,
  - ▶ You will be prompted with a warning
  - ▶ You will need to type “OK” to continue

## For IEP Ratio and Tuition Costs

- ☒ Use RS Included in CB entries to determine which Children have a direct Medical Service included in IEP
- ☐ Assume All CB children have a direct Medical Service included in IEP
- ☐ Use "Has Medicaid Medical Service on IEP" indicator to determine children



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# Disclaimers

- ▶ If
  - ▶ you select “Use RS Included in CB Entries to determine...” and there is less 50% or
  - ▶ You select “Assume all CB children...”
- ▶ Then the numbers will have disclaimers indicating possible unreliability of the IEP Ratio and Tuition costs

Annual Contractors Cost Information | General and Statistical Information | Transportation Other Costs | Annual Tuition Costs

IEP Ratio

Total Medicaid SpEd Students with an IEP-Prescribed Reimbursable Service:

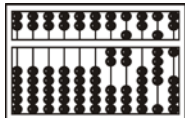
Total SpEd Students with an IEP-Prescribed Reimbursable Service:

**Disclaimer: May not be a reliable figure**

Annual Contractors Cost Information | General and Statistical Information | Transportation Other Costs | Annual Tuition Costs

**Disclaimer: These costs may not be reliable**

School	Notes	Total Cost	Federal Funds
▶ .		\$5,559.00	
		\$2,746,571.03	
		\$3,924,404.95	
		\$1,436,374.29	
		\$499,476.50	



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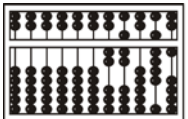
# New version

- ▶ Latest version of Preschool, version 5.6.0
- ▶ Includes changes:
  - ▶ New check box on CB enrollment screen for “Has Medicaid Medical Service on IEP”
  - ▶ New screen to update CB enrollments “Has Medicaid Medical Service on IEP”
  - ▶ Changes to Cost report for
    - ▶ IEP Ratio being full year
    - ▶ Report tuition costs only on children that have a direct medical service on their IEP
- ▶ We have deployed to about ½ the counties so far



# Supplemental Reports

- ▶ # of Encounters & Supplemental form for Contracted Providers (list of providers with NPI)
- ▶ Unless your County Used CPSE Portal for all providers, all services, for the entire period of the cost report, there is nothing in Preschool that can assist with these
- ▶ We will work directly with those Counties to give them their numbers
- ▶ All other Counties must get this information directly from their agencies/providers



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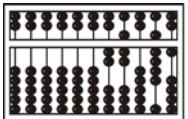
 **PORTAL**

The logo features the letters 'C', 'P', 'S', and 'E' in a 2x2 grid. 'C' is green, 'P' is blue, 'S' is yellow, and 'E' is red. To the right of this grid is the word 'PORTAL' in a large, bold, black sans-serif font.



# Encounters

- ▶ Need both fee for service related service sessions plus tuition based services to be counted
- ▶ Payments for non-treatment sessions should not be reported (CPSE meetings, etc.)
- ▶ Sessions that are not the full duration specified in the IEP should not be counted. If IEP says 2x45, and one day the session was only 40 minutes, that should not be counted

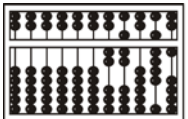


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# List of contracted providers

- ▶ Need name, NPI, profession and supervisor for all providers that provided direct medical service to a child per IEP, regardless of whether the child was Medicaid or not



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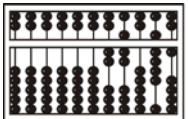
 **PORTAL**

The logo features the letters 'C', 'P', 'S', and 'E' each inside a small colored square (green, blue, yellow, and red respectively), followed by the word 'PORTAL' in a large, bold, black sans-serif font.

# BOCES - Tuition

- ▶ BOCES tuition programs should not be reported as tuition costs
- ▶ Instead, the costs for the direct medical services should be broken out of the tuition and reported as contractor costs
- ▶ How are the service costs broken out of the tuition? According to PCG...

*"BOCES should be able to break out the health related expense at the LEA's request."*



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# BOCES Email Q&A from PCG



Mon 12/5/2016 10:02 AM

nysshsp <nysshsp@pcgus.com>

Re: Cost Report Questions related to Preschool programs

To: Frament, Tim

You replied to this message on 12/5/2016 10:03 AM.

B) A follow up for the BOCES question.

**Where should BOCES tuition fees be reported?**

**BOCES tuition should NOT be reported, just service cost**

The payments to BOCES are single payment for both Tuition and services. For some Counties, the vast majority of the medical service costs are embedded in tuition payments to BOCES.

What guidance does PCG have for determining those medical services costs?

Some possibilities are could be:

- Could BOCES use the County fee for service rate for that service and then approximate it by multiplying the corresponding fee-for-service rate times the # of services provided?

**BOCES should be able to break out the health related expense at the LEA's request.**

- It has been reported in your trainings/presentations, that PCG calculates a Health Related Tuition Percentage for each provider based on their CFR. Can PCG provide that to BOCES so that BOCES can apply that factor to approximate a cost?

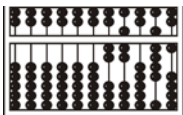
**- We do not get a H RTP for BOCES because BOCES is not approved as a State Approved School for the purposes of this cost report.**

Thank you,

Public Consulting Group, Inc. (PCG)

[NYSSHSP@pcgus.com](mailto:NYSSHSP@pcgus.com)

866-912-2974



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