

# Illinois Medicaid School Based Services IASBO Meeting

Changes to the School-Based Medicaid Program as a Result of SPA  
Pending Approval

*March 15, 2023*

# Agenda

Recap on previously communicated changes

What is changing with the new SPA?

- New Services, Providers, Students

- Rates, Financial Submission, Cost Settlement

- Time Study

- Specialized Transportation Billing

- Changes under consideration

Understanding the Cost Report

Direct Medical Equipment Depreciation

General and Statistical Information

Transportation Reporting

Questions

**Recap of previously communicated changes**

## Recap on previously communicated changes

- ALL staff billing school-based services MUST be on the staff pool list to include costs on the annual cost report
  - This includes paraprofessionals / health aides
  - Costs for staff NOT on the staff pool list cannot be included on the annual cost report
- Staff contracted from a Special Education Cooperative or other school district are ONLY to be included on the employing entities Staff Pool List and that entity must claim for the direct services they provide under their provider number
  - Contractors from other outside agencies can still be included and claimed
- Job categories matter – there is a difference between Medical Social Workers and Educational Social Workers on the Staff Pool List
  - Only costs for staff identified as Medical Social Workers can be included on the annual cost report
- Districts MUST adhere to the quarterly financial expenditure submission deadlines
  - Failure to submit costs by the due date will result in a loss of cost reporting for that quarter and those costs WILL NOT be included on the annual cost report.
  - There is no longer an 8 quarter filing window for quarterly financial expenditures



**What is changing with the New SPA?**

# Changes in the SPA – Services, Providers and Students

- New Services / Providers have been added:
  - Expansion of Mental Health Services:
    - Licensed Clinical Professional Counselors (LCPCs)
    - Licensed Marriage and Family Therapists
    - Licensed Clinical Psychologists (LCPs)
  - Orientation and Mobility
  - ABA Services provided by Registered Behavior Technicians
- Expanded Population of Eligible Students
  - Medicaid Eligible students that have medical necessity documented in a way other than an IEP/IFSP can have services billed for reimbursement (upon program approval) provided the other traditional requirements are met:
    - Properly licensed provider, Parental Consent, Physician Authorization (if needed), etc.
- Introduction of Cost Settlement
  - Will replace the rate setting process used in the past



# Changes in the SPA – Rates, Financial Submission and Cost Settlement

- Rates
  - Districts will continue to submit claims using the established rates
  - Annual rate collection process will no longer be needed
  - Previous Fiscal Year rate adjustments will continue until adjustments through Fiscal Year 2021 are processed
- Quarterly Financial Submission Policy
  - Effective FY2023 Districts must submit their quarterly financial expenditure data within the posted due date (approximately 6 weeks after the close of the quarter)
  - Districts that fail to submit the quarterly financial expenditure data in the required timeframe LOSE the ability to claim costs for that quarter and those costs WILL NOT be included on the Annual Cost Report
  - FY2022 allowed a two quarter window to submit expenditure data
  - Quarters prior to FY2022 (July 1, 2021) expire on the previous 8 quarter window
    - April-June 2021 will expire with this February 15, 2023 quarterly expenditure due date



# Changes in the SPA – Rates, Financial Submission and Cost Settlement (cont'd)

- Introduction of Cost Settlement
  - Will replace the rate setting process used in the past
  - Annual Cost Report for Fiscal Year 2022 will open on February 15, 2023 and will be due March 31, 2023
  - If a district has not submitted quarter financial expenditures for the Fiscal Year 2022 quarters, those costs WILL NOT be included in the FY 2022 cost report.
    - Quarterly financials MUST BE submitted on time to be included in the Annual Cost Report





# Changes in the SPA – Time Study

- Time Study will continue three times per year
- **IMPORTANT:** The OCTOBER – DECEMBER QUARTER MUST now be expanded to include all regular school days from the start of school in August
  - Time Study in the Fall will now run from August (first day of any district in the State of Illinois) through December 31<sup>st</sup>
  - PCG will be collecting from ALL participating districts their first day of the regular school year for staff for the 2023 – 2024 school year
    - Districts MUST submit their start date in order to participate in the time study
    - Collection of start dates will occur in mid-April to mid-May to allow for district board calendar approval
    - Failure to submit your start date could impact your ability to participate in the time study
  - Staff Pool Lists and formal calendars for the period will begin in June and will be due in early July
- The quarterly financial collection period for what was the July – September quarter will change from July 1 – September 30<sup>th</sup> to July 1 – to the day before first day of any district in Illinois in August.
  - Example, if the first school day for any participating district in Illinois is August 15<sup>th</sup>, the financial collection periods will be July 1<sup>st</sup> – August 14<sup>th</sup> and August 15<sup>th</sup> to December 31<sup>st</sup>.
  - Financials for the July – mid-August period will open in October
  - Financials for the mid-August – December 31<sup>st</sup> period will open in January.



# Changes in the SPA – Transportation

- Specialized transportation will be able to be billed for Special Education Students with Specialized Transportation on their IEP on days when they receive another billable Medicaid covered service – No change

Transportation may be claimed as a Medicaid service when the following conditions are met:

1. Specialized transportation is specifically listed in the IEP/IFSP as a required service;
  2. The child required transportation in a specially adapted vehicle to serve the needs of an individual with an IEP/IFSP disability;
  3. A Medicaid eligible service is provided on the day that the specialized transportation is billed;
- Trip logs must be maintained for billing and audit purposes – No Change
  - Specialized transportation will be billed in the same manner as before using your district's HFS approved transportation billing rate – No Change
  - Specialized Transportation is defined as transportation provided in a specially-adapted vehicle that has been physically-adjusted or designed (e.g., wheelchair lifts, ramps, etc.) - **CHANGE**
    - Bus must be specially-adapted in order for the transportation to be considered specialized
    - The presence of only an aide(s) (on a non-adapted bus/vehicle) or seat belts does not make a vehicle specially-adapted



# Changes in the SPA – Under Consideration

- Random Moment Time Study Moment Notification – HFS is seeking approval to be able to provide prior notification of sampled moments to staff members and LEAs
  - Current notification window is zero notification (time of moment)
  - HFS is seeking a minimum of 24 hours of notification
  - Not yet approved by CMS
- Timely Filing for Fee-for-Service Claims
  - Current timeframe is 18 months from date of service
  - Looking to potentially adjust that to be able to finalize and pay final cost settlement payments sooner to districts
    - Cost reports must be finalized within 24 months after close of fiscal year
    - Cost reports require final interim fee-for-service payment information to finalize
    - Given 18 months to submit claims and time for HFS to process pay and close out claims, leaves little time for the final cost reports to be calculated, reviewed, approved and paid before the mandatory cut-off
    - Shortening submission window WILL NOT change the calculated cost settlement amount for your district.



# **Understanding Interim Payments and the Annual Cost Report**

# Annual Cost Settlement and Cost Reconciliation

- The annual cost report collects school district financial and statistical information to determine the actual costs of providing direct medical services to Medicaid enrolled students with documented medical necessity

| Data Elements for Annual Cost Report  | School District Specific vs. Statewide | Data Source   |
|---|--|---|
| Salary and Benefit Costs  | School District Specific               | Quarterly Financial Submissions for MAC Claims (district financial records) |
| Contractor Costs  | School District Specific               | Quarterly Financial Submissions for MAC Claims (district financial records) |
| Other Non-Personnel Costs   | School District Specific               | Reported in Annual Cost Report (district financial records)                 |
| Unrestricted Indirect Cost Rate   | School District Specific               | ISBE  |
| Direct Medical Service % from RMTS for IEP/ IFSP population(1 per Cost Pool)  | Statewide                              | Quarterly RMTS  |
| Direct Medical Service % from RMTS for Free Care population (1 per Cost Pool) |  |   |
| MER (IEP Ratio)   | School District Specific               | HFS / ISBE data match   |



# Annual Medicaid Allowable Calculation

## IEP Direct Service Calculation



Add transportation allowable costs here if applicable

## Free Care Direct Service Calculation



### Cost Base

Net reported salaries, benefits, contracted and direct medical other costs



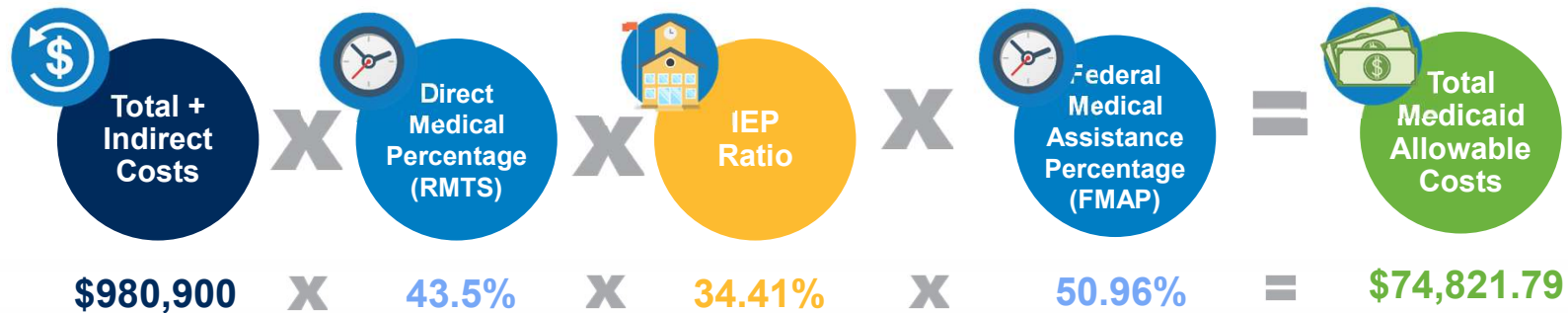
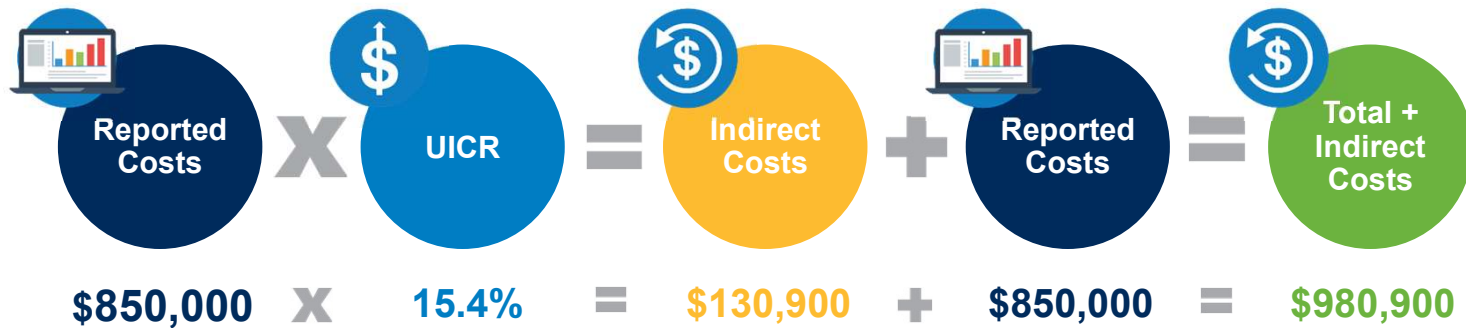
UICR



Medicaid allowable costs



# Example Calculation



UICR= Unrestricted Indirect Cost Rate    IEP Ratio = Medicaid Eligibility Rate



# Annual Settlement



- Amount Received in Reimbursement = the amount received by the district from regular claim submission from HFS for dates of service during the fiscal year
- Nationally, ALL states that have gone to cost settlement have resulted in a Net Increase in Federal Reimbursement





# Direct Medical Equipment Depreciation

# Direct Medical Equipment Depreciation

LEAs/JAs may report depreciable direct medical assets purchases that are directly related to the delivery of medical services

- Allowable direct medical equipment assets that are depreciable are limited the following:

## Allowable Direct Medical Equipment Depreciable Assets

|                       |                         |                              |
|-----------------------|-------------------------|------------------------------|
| Audiometer            | Dynamometer (hand)      | Sanitizer                    |
| Aspirator             | Drapery Tracks          | Scoliometer                  |
| Basins (emesis/water) | FM Amplification System | Sphygmomanometer             |
| Battery Charger       | Folding Partitions      | Stethoscope                  |
| Blood Pressure Device | Nebulizer               | Table (examining)            |
| Cameras               | Ophthalmoscope          | Technology Device (computer) |
| Chart Rack            | Optical Readers         | Thermometer (electric)       |
| Chart Recorder        | Otoscope                | Tympanometer                 |
| Computer Software     | Physician's Scale       | Ultrasonic Cleaner           |
| Defibrillator         | Refrigerator            | Wheelchair                   |



# Entering Direct Medical Equipment

Allowable direct medical depreciable assets are entered on the Annual > Direct Medical Services Equipment Depreciation page of the PCG Claiming System

- Assets are entered by clicking on the 'Add Asset' button
- Once entered within the system, direct medical depreciable assets are rolled over year to year

PCG CLAIMING SYSTEM  
Illinois School-Based Health Services (SBHS) Program

FY22 : Jul-Sep 2021 District: ADDISON SCHOOL DISTRICT NO 4

Home Users Staff Pool Calendar Moments Notifications Quarterly Annual Configuration Reports

### Annual: Direct Medical Equipment Depreciation

**Add Asset** Export Options Import

**Available Filters**

| Unique Asset ID | Asset Type | Service Type       | Description | Placed In Service | Remove From Service | Years of Useful Life | Cost        | Prior Depreciation | Depreciation For Reporting Period | Delete |
|-----------------|------------|--------------------|-------------|-------------------|---------------------|----------------------|-------------|--------------------|-----------------------------------|--------|
| 4114            | Aspirator  | Audiology Services | 1414        | 01/2019           |                     | 15                   | \$50,000.00 |                    |                                   |        |

( 1 Depreciable Asset )

ilmac@pcgclaimingsystem.zendesk.com | 833-976-1847 | www.publicconsultinggroup.com

- Claims
- Claim Status
- Salaried Staff
- Contracted Staff
- Costs By Job Category
- Direct Medical Services Other Costs
- Transportation Salaried Staff
- Transportation Other Costs
- Direct Medical Equipment Depreciation**
- Transportation Equipment Depreciation
- General and Statistical Information
- Interim Payments
- Cost Report
- Desk Review
- CPE Form
- Cost Settlement
- Funds

Prior Depreciation: 7,500.00  
Depreciation For Reporting Period: \$3,000.00



# Direct Medical Equipment Depreciation

Create New Direct Medical Equipment

**Asset Type:**  (Required)

**Unique Asset ID:**  (Required)

**Description:**  (Required)

**Cost Pool:**

**Service Type:**  (Required)

**Placed In Service:**  (Required)

**Removed From Service:**

**Years Of Useful Life:**  (Required)

**Cost:**  (Required)

**Federal Funds and Other Reductions:**  (Required)

**Notes:**

Excluded

Add Another?   (No changes on page)

## Direct medical equipment assets are depreciated using a straight-line depreciation

- All fields that are red and indicated as required must be completed before changes can be saved
- Asset type is selected from the drop-down list that includes only allowable assets
- Unique asset identification and description should match supporting asset ledger
- All portions of the medical equipment assets that are federally funded should be reported as an offset
  - The PCG Claiming System calculates the net allowable medical equipment depreciation costs
- It is imperative that years of useful life, cost, and date placed in service are accurate because of its affect on each subsequent year's depreciation as well



# General and Statistical Information

# Unrestricted Indirect Cost Rate (UICR)

PCG enters the UICR on behalf of LEAs/JAs, but information is displayed on the Annual>General and Statistical Information page

- The Illinois State Board of Education (ISBE) in cooperation with the Department of Education (DOE) develops an indirect cost plan to be used by LEAs/JAs
  - ISBE approves UICRs for DOE, which is the cognizant agency for LEAs/JAs
  - When an UICR is not available, a 10% de minimus rate will be used
  - Indirect Costs determined by applying the LEA/JA specific UICR to adjusted direct costs are added during the cost settlement calculation

The screenshot shows the PCG CLAIMING SYSTEM interface for the Illinois School-Based Health Services (SBHS) Program. The header includes the program name, fiscal year (FY22), period (Jul-Sep 2021), and district (ADDISON SCHOOL DISTRICT NO 4). A navigation bar contains links for Home, Users, Staff Pool, Calendar, Quarterly, Annual, and Reports. The main content area is titled "General and Statistical Information" and includes an "Export Options" button. A table displays the UICR value:

| Variable                               | Value | Warning |
|--|-------|---------|
| Unrestricted Indirect Cost Rate (UICR) | 0.25  |         |



# IEP/IFSP Medicaid Enrollment Ratio

## PCG enters the IEP/IFSP Medicaid Enrollment Ratio on behalf of LEAs/JAs

- The IEP/IFSP Medicaid enrollment ratio determines the proportion of students with an IEP/IFSP prescribed reimbursable medical service that are Medicaid eligible
  - HFS will be working with ISBE to obtain data from the 12/1 Special Education Enrollment Count Report
  - Application of this ratio allocates adjusted direct medical costs to the Medicaid eligible reimbursable population



# Other Plans of Care Medicaid Enrollment Ratio

## PCG enters the Other Plans of Care Medicaid Enrollment Ratio on behalf of LEAs/JAs

- The Other Plans of Care Medicaid enrollment ratio determines the proportion of students within the LEA/JA that are Medicaid eligible
  - HFS will be working with ISBE to obtain data from the 10/1 Fall Enrollment Count Report
  - Application of this ratio allocates adjusted Free Care costs to the Medicaid eligible reimbursable population





# Transportation Cost Reporting

Dismissal for LEAs/JAs not reporting transportation

# Specialized versus Not Only Specialized

Transportation costs will be reported as either 'Specialized' or 'Not Only Specialized'

- Specialized costs are associated with exclusive transport of special education students with specialized transportation prescribed within their IEP/IFSP on a physically modified vehicle
- Physically modified bus ONLY transports students that require the physical modification to the bus
  - Ex. Wheelchair lift bus and ALL students riding that bus require the lift per their IEP

## Specialized Transportation Costs

|                    |  |
|--------------------|--|
| <b>Other Costs</b> | Costs that <b>EXCLUSIVELY</b> pertain to a physically modified vehicle that transports students with specialized transportation in their IEP/IFSP                |
|                    | Costs can be clearly associated with specialized vehicles within supporting documentation  |
| <b>Staff</b>       | Costs associated with staff who <b>EXCLUSIVELY</b> transport students with specialized transportation prescribed in their IEP/IFSPs or work on modified vehicles |
| <b>Vehicles</b>    | <b>EXCLUSIVELY</b> transports students with specialized transportation prescribed in their IEP/IFSPs and is physically modified                                  |



## ‘Specialized’ versus ‘Not Only Specialized’

- “Not Only Specialized” means the bus has a physical modification but NOT ALL students riding that bus require the physical modification
  - Ex. 6 students ride on a bus with a wheelchair lift but only 4 of the 6 students require the wheelchair lift as outlined on their IEP

| ‘Not Only Specialized’ Transportation Costs |  |
|---|--|
| <b>Other Costs</b>                          | Costs that cannot be discretely identified as pertaining to a physically modified vehicle that exclusively transports students with specialized transportation in their IEP/IFSP                                   |
|   | Costs associated with bulk purchases for all vehicles and/or a vehicle that has both general and special education routes  |
| <b>Staff</b>                                | Costs associated with staff who transport <b>BOTH</b> students with specialized transportation prescribed in their IEP/IFSPs on a modified vehicle AND general education students or work on all district vehicles |
| <b>Vehicles</b>                             | Physically modified and transports <b>BOTH</b> students with specialized transportation prescribed in their IEP/IFSPs and general education students   |



# Transportation Notes

- Costs associated with exclusive transport of general/regular education students are not allowable
- Do NOT report costs for ANY bus or routes (if outsource transportation) that does not have a specific physical modification even if they only transport Special Education Students
- Physical modifications include but not limited to:
  - Wheelchair lift
  - Ramp
  - Special harness or seat required by the child per the IEP
- The following are examples of things not considered special modifications:
  - Door-to-door pick-up
  - Standard Seatbelt
  - Aide on the Bus
  - One-on-One Aide that rides the bus with the student
  - Individual student transport only
- Report buses, routes or costs in Specialized ONLY transportation if ALL students on that bus / route (contracted) require the physical modification on the bus
- Report buses, routes or costs in Not ONLY Specialized transportation if not every student on that bus / route (contracted) require the physical modification on the bus



# Transportation Salaried Staff

# Transportation Salaried Staff

Enter cost data for transportation salaried staff from the Annual>Transportation Salaried Staff page

- Select 'Add New Line Item' to enter new transportation salaried staff
  - Transportation staff are not included on the RMTS and MUST be updated as necessary each year
  - Allowable Transportation salaried staff include:
    - Bus drivers
    - Mechanics & mechanic assistants
    - Substitute drivers
  - Ensure categorization ('specialized' or 'not only specialized') is appropriate for the FY

PCG CLAIMING SYSTEM  
Illinois School-Based Health Services (SBHS) Program  
FY22 : Jul-Sep 2021 District: ADDISON SCHOOL DISTRICT NO 4  
Home Users Staff Pool Calendar Moments Quarterly Annual Configuration Reports  
Annual: Transportation Salaried Staff  
Add New Line Item Review Questions Clear Questions Export  
Salaried Staff  
Contracted Staff  
Costs By Job Category  
Direct Medical Services Other Costs  
Transportation Salaried Staff (Opened)



# Adding New Transportation Salaried Staff

All Transportation salaried staff can be entered or edited each FY

- All fields that are red and indicated as required must be completed before changes can be saved
- Job category is selected from the drop-down list that includes only allowable job categories
- Employee identification is a required field
- All portions of salaries and benefits that are federally funded should be reported as an offset
  - The PCG Claiming System calculates the net allowable transportation salaried staff costs

Create New

Service Type:  (Required)

Job Category:  (Required)

Employee Id:  (Required)

First Name:  (Required)

Last Name:  (Required)

Job Title:

Employment Status:  (Required)

Hours Paid:

Employee Salary:  (Required)

**Employee Benefits**

Benefits:  (Required)

**Offsets**

Compensation Federal Revenues:  (Required)

Gross Costs: \$0.00

Net Costs: \$0.00

Notes:

Add Another?   (No changes on page)



## **Transportation Other Costs**



# Transportation Other Costs

Transportation Other Costs are reported under the appropriate service type ('specialized' or 'not only specialized') from the Annual>Transportation Other Cost page

- Enter only allowable costs according to approved program methodology
  - Costs must be formatted with two decimal places and not rounded to the nearest whole dollar
  - LEA/JA must retain all invoices to support reported costs, along with payment verification

PCG CLAIMING SYSTEM  
Illinois School-Based Health Services (SBHS) Program  
FY22 : Jul-Sep 2021 District: ADDISON SCHOOL DISTRICT NO 4

Home Users Staff Pool Calendar Moments Quarterly Annual Configuration Reports

Annual: Transportation Other Costs

Review Questions Clear Questions Export

Please note that any data entered on this page will require the transportation and Statistical Information page.

Salaried Staff  
Contracted Staff  
Costs By Job Category  
Direct Medical Services Other Costs  
Transportation Salaried Staff  
Transportation Other Costs



# Entering Transportation Other Costs

All Transportation other costs are entered by total for all vendors by allowable category

- All fields that are red and indicated as required must be completed before changes can be saved
  - Enter a '0' value if no costs are associated with the required field
- Allowable transportation other costs include:
  - Fuel & Oil
  - Repairs & Maintenance
  - Lease/Rentals
  - Insurance
  - Purchased Professional Transportation Services and/or Equipment
- All portions of transportation other costs that are federally funded should be reported as an offset
  - The PCG Claiming System calculates the net allowable transportation other costs

Edit: 1 / 2

Service Type: Transportation Services (not only specialized trans)

Cost

Repairs & Maintenance:  (Required)

Repairs & Maintenance Federal Funds:  (Required)

Fuel & Oil:  (Required)

Fuel & Oil Federal Funds:  (Required)

Lease/Rentals:  (Required)

Lease/Rentals Federal Funds:  (Required)

Insurance:  (Required)

Insurance Federal Funds:  (Required)

Purchased Professional Transportation Services and/or Equipment:  (Required)

Purchased Professional Transportation Services and/or Equipment Federal Funds:  (Required)

Gross Costs:

Net Costs:

Notes:

< >  Edit Another?   (No changes on page)

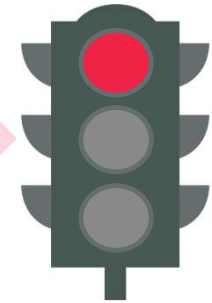


# Transportation Repairs and Maintenance Costs

*“Does it  
make the  
vehicle  
go?”*

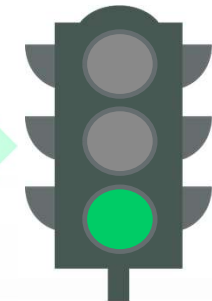
## Non-Allowable

- CPR training/drug testing for drivers
- Student count clickers
- Gloves, masks, shop towels
- Cameras and camera installation software
- General office supplies for the transportation department



## Allowable

- Maintenance of vehicle
- Costs to repair
- Outside labor
- Parts for the vehicle
- Towing cost



# **Transportation Equipment Depreciation**

# Entering Transportation Equipment Depreciation

Allowable transportation depreciable assets are entered on the Annual> Transportation Equipment Depreciation page of the PCG Claiming System

- Assets are entered by clicking on the 'Add Asset' button
  - Once initially entered within the PCG Claiming System, this data will automatically populate into future annual cost reports
- Allowable transportation depreciable assets include student transport vehicles that have been specially adapted to meet the needs of special education students in the school setting

The screenshot displays the PCG CLAIMING SYSTEM interface for the Illinois School-Based Health Services (SBHS) Program. The top navigation bar includes 'Home', 'Users', 'Staff Pool', 'Calendar', 'Moments', 'Notifications', 'Quarterly', 'Annual', 'Configuration', and 'Reports'. The 'Annual' dropdown menu is open, showing a list of options: Claims, Claim Status, Salaried Staff, Contracted Staff, Costs By Job Category, Direct Medical Services Other Costs, Transportation Salaried Staff, Transportation Other Costs, Direct Medical Equipment Depreciation, and Transportation Equipment Depreciation. The 'Add Asset' button is highlighted with a red box, and the 'Transportation Equipment Depreciation' option in the dropdown menu is also highlighted with a red box. The page title is 'Annual: Transportation Equipment Depreciation'.



# Transportation Equipment Depreciation

Create New Transportation Equipment

Asset Type:  (Required)

Unique Asset ID:  (Required)

Description:  (Required)

Cost Pool:  
Service Type:  (Required)

Placed In Service:  (Required)

Removed From Service:

Years Of Useful Life:  (Required)

Cost:  (Required)

Federal Funds and Other Reductions:  (Required)

Notes:

Excluded

Add Another?   (No changes on page)

## Transportation equipment assets are depreciated using a straight-line depreciation

- All fields that are red and indicated as required must be completed before changes can be saved
- Asset type is selected from the drop-down list that includes only allowable assets
- Unique asset identification and description should match supporting asset ledger
- All portions of the purchase price that are federally funded should be reported as an offset
  - The PCG Claiming System calculates the net allowable asset depreciation costs
- It is imperative that years of useful life, cost, and date placed in service are accurate because of its affect on each subsequent year's depreciation as well
- Exclude vehicles that do not meet depreciation requirements for the FY being reported by selecting the 'Exclude' checkbox



# Transportation Equipment Depreciation



- LEAs may report transportation equipment depreciation costs for buses and vehicles if they are physically modified and have been assigned at least one route exclusively dedicated to the transport of special education students with specialized transportation prescribed in their IEP
  - The purchase of a wheelchair lift and other required devices can also be depreciated



- Depreciation is automatically calculated in the PCG Claiming System according to a straight-line depreciation method
  - Depreciated cost for assets placed into service, removed from service, or that become fully depreciated during the cost reporting period will be prorated accordingly by month
  - $X = (\text{Cost} - \text{Federal Funds}) \div \text{Years of Useful Life}$



- Transportation equipment should be assigned the appropriate transportation category according to the FY being reported ('specialized' or 'not only specialized')



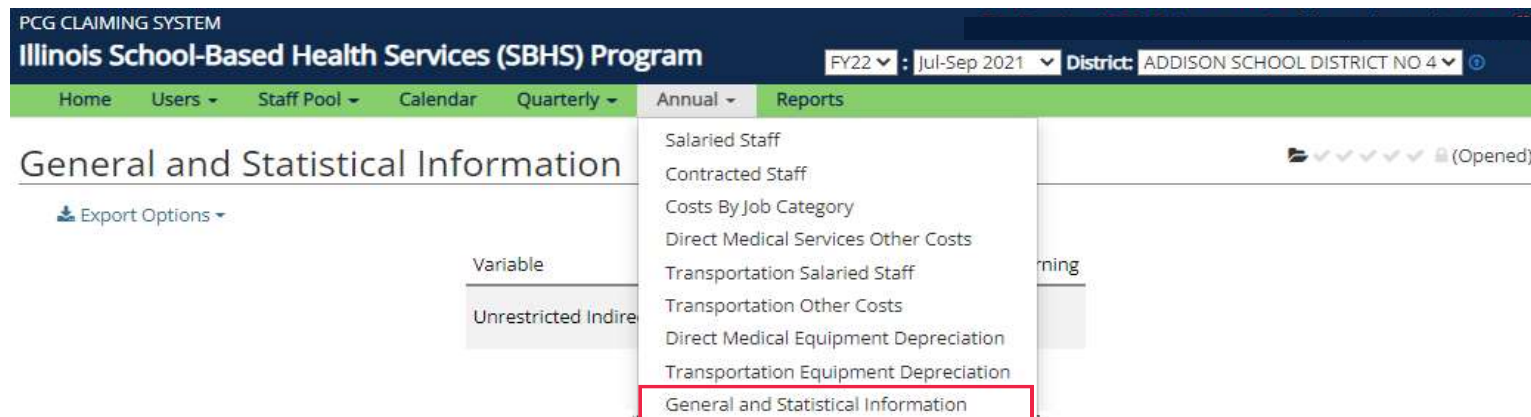
# General and Statistical Information



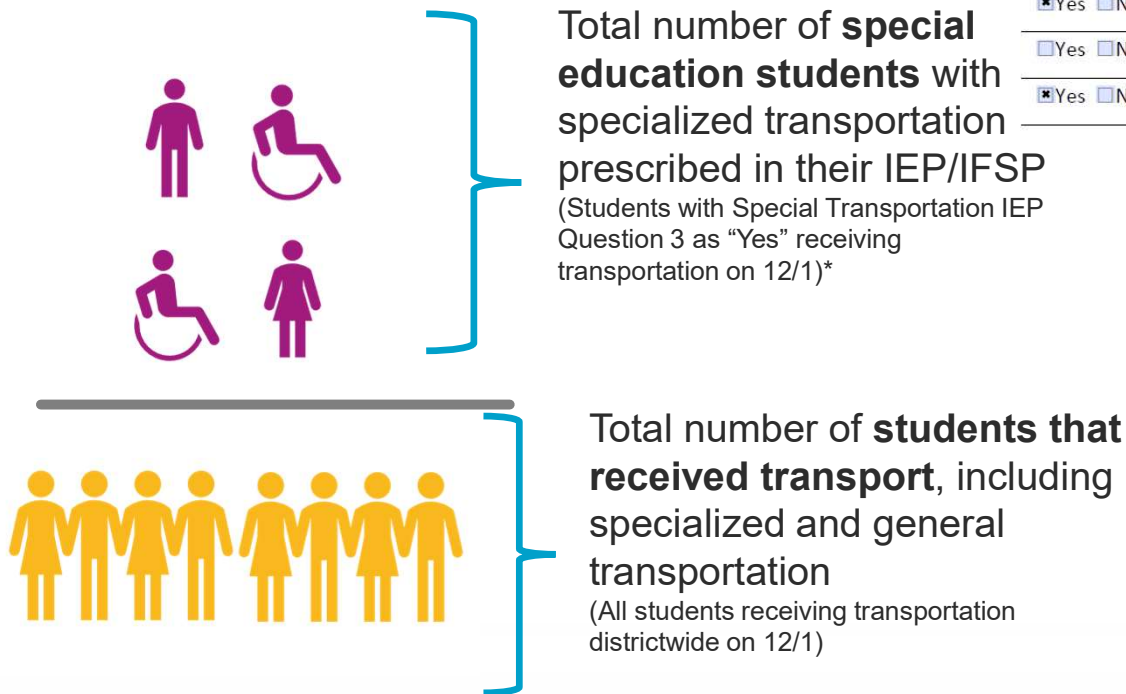
# General and Statistical Information

All transportation ratios appear on the Annual>General and Statistical Information page of the PCG Claiming System

- Transportation ratios are required if report costs associated with transportation
  - Specialized transportation student ratio is not required unless 'not only specialized' costs are reported



# Specialized Transportation Student Ratio



| TRANSPORTATION  |   |
|---|---|
| Check all that apply  |   |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | Special transportation is required to and from schools and/or between schools.          |
| <input type="checkbox"/> Yes <input type="checkbox"/> No            | Special transportation is required in and around school buildings.                      |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | Specialized equipment (such as special or adapted buses, lifts, and ramps) is required. |

PCG recommends using a 'snapshot in time' to collect the data

- For consistency with ISBE Special Education Enrollment Count Report, 12/1 could be used as the capture date
  - If LEA is not in session on 12/1 utilize the next student attendance date
  - Reports and all supporting trip logs should be retained to support total number of students reported
- The denominator includes students receiving both specialized transportation and general transportation

\* Provided answer to question #3 references a special physical modification to the bus required for the child, i.e. wheelchair lift, ramp, special harness, etc.



# Medicaid One Way Trip Ratio

The Medicaid One Way Trip Ratio is used to allocate the Medicaid allowable specialized transportation costs from the total specialized transportation costs reported by the district

- Trip ratio is required for costs associated with both ‘specialized’ and ‘not only specialized’ transportation
  - The numerator for the Medicaid One Way Trip Ratio will be the total number of specialized transportation one-way trips for Medicaid enrolled students
    - Populated by PCG and is based on paid transportation claims
  - Denominator is the total number of specialized transportation one-way trips for all students (Medicaid enrolled and non-Medicaid enrolled students) –
    - You can use the Specialized Transportation Student Ratio Numerator to calculate this number
    - The denominator is reported by the LEA and can be calculated according to one of two methods

**Actual**

- Calculate the actual count according to bus logs per LEA documentation to support all trips
- This method is best practice!

**Conservative**

- Multiply the total number of students with specialized transportation in their IEP, by the total number of school days, by 2 trips (maximum number of claimable trips per day)



## **Steps to Prepare for the SPA**

# Has your district been preparing for billing upon SPA approval?

- Documentation of Medical Necessity
  - How are you documenting medical necessity for students that have that in documentation other than an IEP/IFSP?
    - These can include 504 plans, Individual Health Plans, Prescriptions, Doctor's Orders
    - Do these documents contain all of the required data?:
      - Start and End Date
      - Scope
      - Frequency
      - Duration
      - Justification for service
    - Are these being maintained in a way that they can be retrieved in the event of an audit?
- Obtain Parental Consent for this new population
  - ISBE is requiring Parental Consent be obtained for this student population
    - Consent Form is available on ISBE website
- Documentation of Services
  - Services must be documented in the same manner as you have done for the IEP/IFSP population
  - Do staff have tools / systems to document for this expanded population and have they been trained to do so?



# Steps for Optimizing Reimbursement

# 1) Are ALL of your eligible staff on the Staff Pool List in the Correct Category / Cost Pool

## Direct Service Personnel

### Cost Pool 1

- Audiologist
- Licensed Clinical Professional Counselors (LCPCs)\***
- Licensed Practical Nurses (LPN)
- Licensed Marriage and Family Therapists\***
- Medical Social Worker
- Occupational Therapist
- Occupational Therapy Assistant (COTA)
- Orientation and Mobility Specialists\***
- Physical Therapist
- Physical Therapist Assistant (CPTA)
- Registered Nurse (RN)
- School Psychologist
- Licensed Clinical Psychologist (LCP)\***
- Psychologist Interns
- Registered Behavior Technician(RBT)\***
- Speech/Language Pathologist
- Speech Assistant/Speech Aide
- Hearing and Vision Technicians

## Other Personnel

### Cost Pool 2

- Educational Social Workers
- School Counselor
- Administrators
- Interpreters & School Bilingual Assistants
- Case Managers/Service Coordinators
- Clerical Support Staff
- Other Administrative Personnel

## Other Direct Service Personnel

### Cost Pool 3

- **School Health Aides\***



# Direct Service Cost Pools

The Direct Service and Other Direct Service cost pools contain participants whose costs are collected on a quarterly basis. After costs for all four quarters in the fiscal year have been collected, they roll up into the annual cost report which is used in determining cost settlement reimbursement.



- ▶ Salaries/benefits **can only** be reported for staff that participated in the RMTS
- ▶ Two cost pools will be included: Direct Service and Other Direct Service

## SPL Reminder

Participant's billing should be included on your SPL





# Claiming Contractor Costs

- Contractors can be included on the staff pool list
  - Contractors need to be on the Staff Pool List in order to claim costs for those positions
  - Contractors included on the Staff Pool List are eligible to be sampled for moments and MUST complete any sampled moments like an employee
- Contractors from outside agencies, other than school districts and Special Education Cooperatives, can be included
- Contractors from other school districts / Coops should be claimed and included on the Staff Pool List of the employing school district / Coop



## 2) Does your district have sufficient Shifts to account for varying schedules?

- District must have a ONE shift in the system.
- Shifts are designed to identify when staff are working so people are chosen at moments when they are performing their role within the school.
  - If shifts are too broad staff may be sampled at times when they are not working
  - Ideally, we only want to sample staff during working time.
- If your district has different start and end times by building, or you employ contracted staff that work hours / days that are different than regular staff, you can create additional shifts to reduce sampling staff at non-working time
- Non-worked time does not count towards the minimum working moment statistical threshold that must be achieved each quarter.
- Consider creating additional shifts for your staff if you have not done so to date



### 3) Updating Vacancy and Direct Replacement

- Vacant positions can be added at the beginning of the quarter to preserve positions for which the LEA intends to fill during the quarter but have not done so at the time the Staff Pool List is submitted for the quarter
- Vacant positions are eligible positions, preserve the ability for cost to be reported once filled but also can be selected for a moment.
  - Districts must review vacant positions on their staff pool list and update those once the position is filled with the information of the person that is filling that position
    - Sampled moments will then be automatically sent to those individuals when filled
    - Costs cannot be claimed for a vacant position that is not updated
- If staff leave, the position should be updated to either: 1) vacant if there is no known replace or; 2) the direct replacement for that person should be updated in the system
- Keeping the staff pool accurate during the quarter is critical for accuracy.



## 4) Moment Completion and Completeness

- The Random Moment Time Study results are shared statewide so your district's response rate and participation not only affects your district but ALL districts in the State.
- Are your staff completing all of their sampled moments?
- Are your staff accurately and completely responded to their sampled moments?
  - Resources are available in the PCG Claiming System on the Home Page in Resources that can be shared with staff
    - Have you shared those with your staff?
- Accurate responses are critical for the time study
  - A few extra moments to provide additional details in their response is very helpful



## 5) Management of Federal Funds & Claiming of Expenditures

- Staff that are 100% federally funded cannot be included on the Staff Pool List
  - ESSER Funds are Federal Funds
- How is your district using and applying federal funds?
- Can those be applied differently to lessen the impact on Medicaid reimbursement?
- Communication across your district
  - Are the district staff pool list contacts and the district financial contacts communicating?
  - Are they discussing funding changes, etc.?
- Are staff being accurately identified so quarterly financial expenditures for staff and contractors are included?



**Questions**

# Contacting PCG

Support can be initiated across multiple channels directly in the PCG Claiming System

Includes phone, live messenger chat and submitting a support ticket

LEA Coordinators will continue to be able to initiate support outside the system via the toll-free hotline and email

- **(833) 976-1847**
- **[ilmac@pcgclaimingsystem.zendesk.com](mailto:ilmac@pcgclaimingsystem.zendesk.com)**

The hotline that is accessible from 8:00AM to 5:00PM (CT), Monday through Friday, excluding federal and IL state holidays

The email account is checked regularly throughout the day, Monday through Friday, excluding federal and IL state holidays



## Call Us

Initiate calls from the very page you have a question on. Quick and direct responses from a PCG customer service representative by explaining what you see, and the help you need.



## Live Chat with Us

Live chat and messaging create a personal connection with coordinators looking for support. It is a fast and effective way to offer help—without interrupting their experience. Easily exchange screen shots and other attachments.



## Leave Us a Support Ticket

Leaving a message will auto populate with the user's information making it fast and easy. Narrow down the specific question topic by selecting issues from the dropdown menus. Receive emails with ticket status and notification of updates.





**Solutions that Matter**