PCG RMTS: AOP Best Practices with Tips and Tricks

2018 School-Based Services Conference

August 16 - 17, 2018

PCG | Education

Agenda

- Recent/Upcoming Important Dates
- Partnership between the ISDs, LEAs, MDHHS, and PCG
- PCG Claiming System Enhancements
- RMTS: Compliance, SPLs, Calendars, and Shifts
- Financial Collection: Support Staff
- Informative Guides:
  - RMTS Staff Pool List and Calendar Checklist
  - Financial Reporting Checklist

Recent/Upcoming Important Dates

Thursday, August 16th

July – September 2018 Part 1 Financials **Open**

Time Study Moments **Begin**

Friday, September 7th

October – December 2018 Staff Pool List, Calendar, and Shifts **Due**

Monday, October 1st
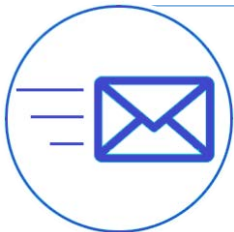
July – September 2018 Part 2 Financials **Open**

Partnership between the ISDs, LEAs, MDHHS, and PCG

Contract Extension

- MDHHS and PCG have extended the partnership to 2023!
- From everyone at PCG, Thank you!
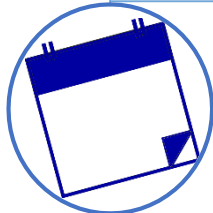
Partnership between the ISDs, LEAs, PCG, and MDHHS

Emails
- Last year, ISDs, LEAs, and PCG exchanged more than 5,191 emails

Phones
- Last year, ISDs, LEAs, and PCG engaged in more than 1,547 phone conversations

Reminders
- PCG strives to proactively communicate through reminders, updates, tips, and additional information

Training
- PCG offers multiple training opportunities each quarter

Flexible Timelines
- ISDs and LEAs work hard to meet deadlines. When needed, PCG tries to accommodate requests for extensions

Optimization
- PCG and MDHHS look for ways to optimize the program

PCG Claiming System Updates

Claiming System Updates and Enhancements

1. Dashboard

2. Participant Tracking
   - Person History
   - Participant Change Details Report

3. Long-term Sub
   - Assists with name tracking within positions

The Dashboard

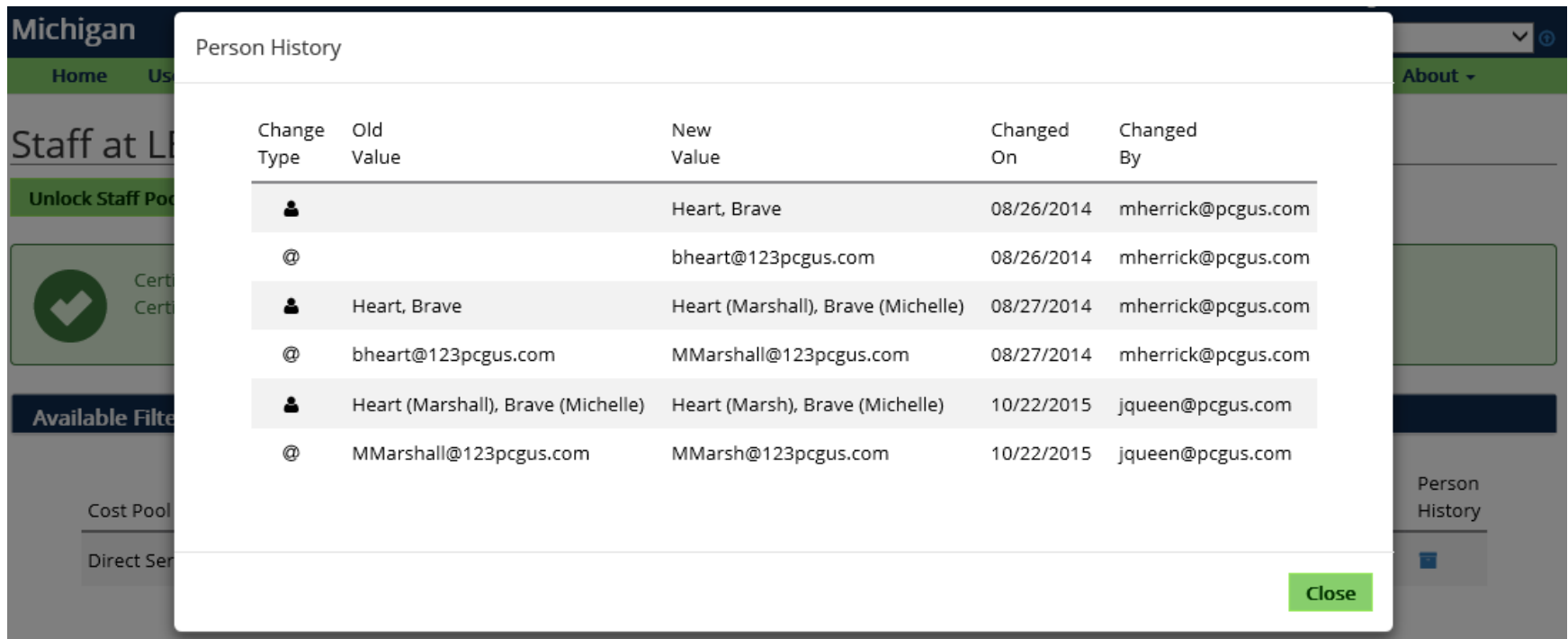The People tab has been split into two dropdowns!
- Users – Grant or change access for LEA/ISD coordinators
- Staff Pool – Make changes to a LEA staff pool list or direct support staff

Person History

- The Person History function is located directly on your SPL page and can be quickly used to view person information
- This tracks the changes of one staff member's information in the position
  - Name edits
  - Email edits

Note: This only tracks a single person, not the entire position history

Participant Change Details Report

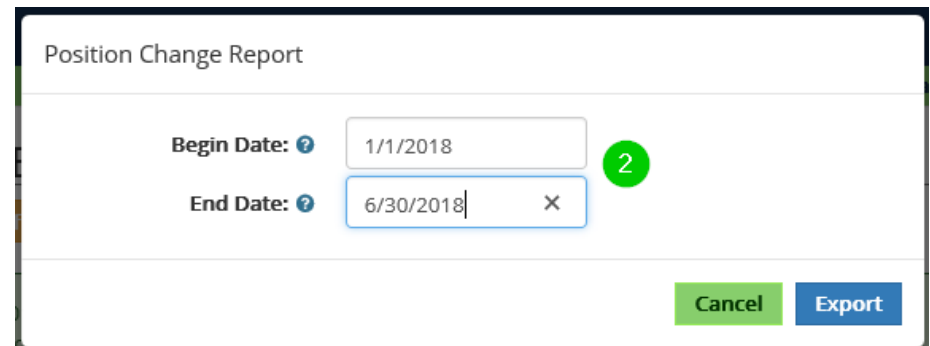- The Participant Change Details Report provides a detailed look into any updates made on a position
- Coordinators will export data into excel which can be manipulated to focus on specific information
- The steps to running the report are as follows:

When on your LEA's Staff Pool List Page, click export and *Export Position Changes*

Enter the desired date range you would like to check data for

Participant Change Details Report

- AuditDate – When the action was completed

- ModUser – Who completed the action

- ChangeType – Brief description of the action

- PreviousData – This is a snapshot of the original data prior to the action

- NewData – Current data reflected in the Claiming System

Position Changes from 1/1/2018 to 6/30/2018								
AuditDate	ModUser	ParentAgency	Agency	JobPositionId	ParticipantId	ChangeType	PreviousData	NewData
6/8/2018 10:42	jqueen@pcgus.com	Demo ISD	Demo LEA	26825	28192	Update Position - Change End Date		4/30/2018
6/8/2018 10:42	jqueen@pcgus.com	Demo ISD	Demo LEA	26825	28268	Fill Position - Staff Email	jlawless@123pcgus.com	abc@test989.com
6/8/2018 10:42	jqueen@pcgus.com	Demo ISD	Demo LEA	26825	28268	Fill Position - Enter Begin Date	10/1/2014	5/25/2018
6/8/2018 10:42	jqueen@pcgus.com	Demo ISD	Demo LEA	26825	28268	Fill Position - Enter End Date	4/30/2018	
6/8/2018 10:42	jqueen@pcgus.com	Demo ISD	Demo LEA	26825	28268	Fill Position - Enter Employment Status	District Payroll	District Payroll
6/8/2018 10:42	jqueen@pcgus.com	Demo ISD	Demo LEA	26825	28268	Fill Position - Staff First Name	Jane	ABCDE
6/8/2018 10:42	jqueen@pcgus.com	Demo ISD	Demo LEA	26825	28268	Fill Position - Staff Last Name	Lawless	TESTing
2/20/2018 11:23	jqueen@pcgus.com	Demo ISD	Demo LEA	26834		Delete Job Position - End Date		2/20/2018
2/20/2018 11:24	jqueen@pcgus.com	Demo ISD	Demo LEA	26853	28239	Update Position - Change End Date		12/31/2017
2/20/2018 11:30	jqueen@pcgus.com	Demo ISD	Demo LEA	26853		Delete Job Position - End Date		12/31/2017

Tracking Assistance!

Notice Anything New!?

Cost Pool:	AOP				
Job Category:	Early Identification/Intervention Personnel				
Shift Type:	Full Time				
Job Position Id:	43558				
Job Title:					
Description:					

Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll		new@enhancement.com	Enhancement, New	10/01/2018		✖

Action: Edit

Edit staff:

☐ Check to enable editing of last name/email ONLY if you are NOT performing a replacement. To perform a replacement please select an appropriate option above.

Employment Type: ❓ District Payroll

Start Date: ❓ 10/01/2018

End Date: ❓ mm/dd/yyyy

Email: new@enhancement.com

☐ No Email

☐ Add Substitute

Employee ID: ❓

First Name: ❓ New
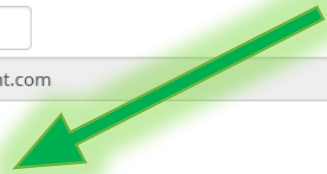
Middle Name:

Last Name: Enhancement

Suffix:

Phone:

Email CC Person:

Long Term Sub!

Create substitute staff:

Start Date: ❓	10/01/2018
End Date: ❓	mm/dd/yyyy
Employment Type:	[dropdown ▼]
	(Required)
Email (new@enhancement.com):	
	(Required)
	☐ No Email
Employee ID: ❓	
First Name (New):	
	(Required)
Middle Name:	
Last Name (Enhancement) :	
	(Required)

- Enter Sub Info!

- View Sub Requirements!

Please Confirm

Can you confirm the long-term sub being entered into the position meets the following:

- A long-term substitute staff must be employed by the ISD/Local Education Agency(LEA) for at least 30 calendar days within the quarter
- The long-term substitute staff must meet all of the program requirements and provider qualifications necessary to participate in the Medicaid school based services program staff pool
- If listed on the staff pool list, the substitute staff must complete the time study moment
- All audit liability for the financial data reported and the tracking of the moments is the responsibility of the ISD/LEA reporting entity

[Cancel] [Confirm]

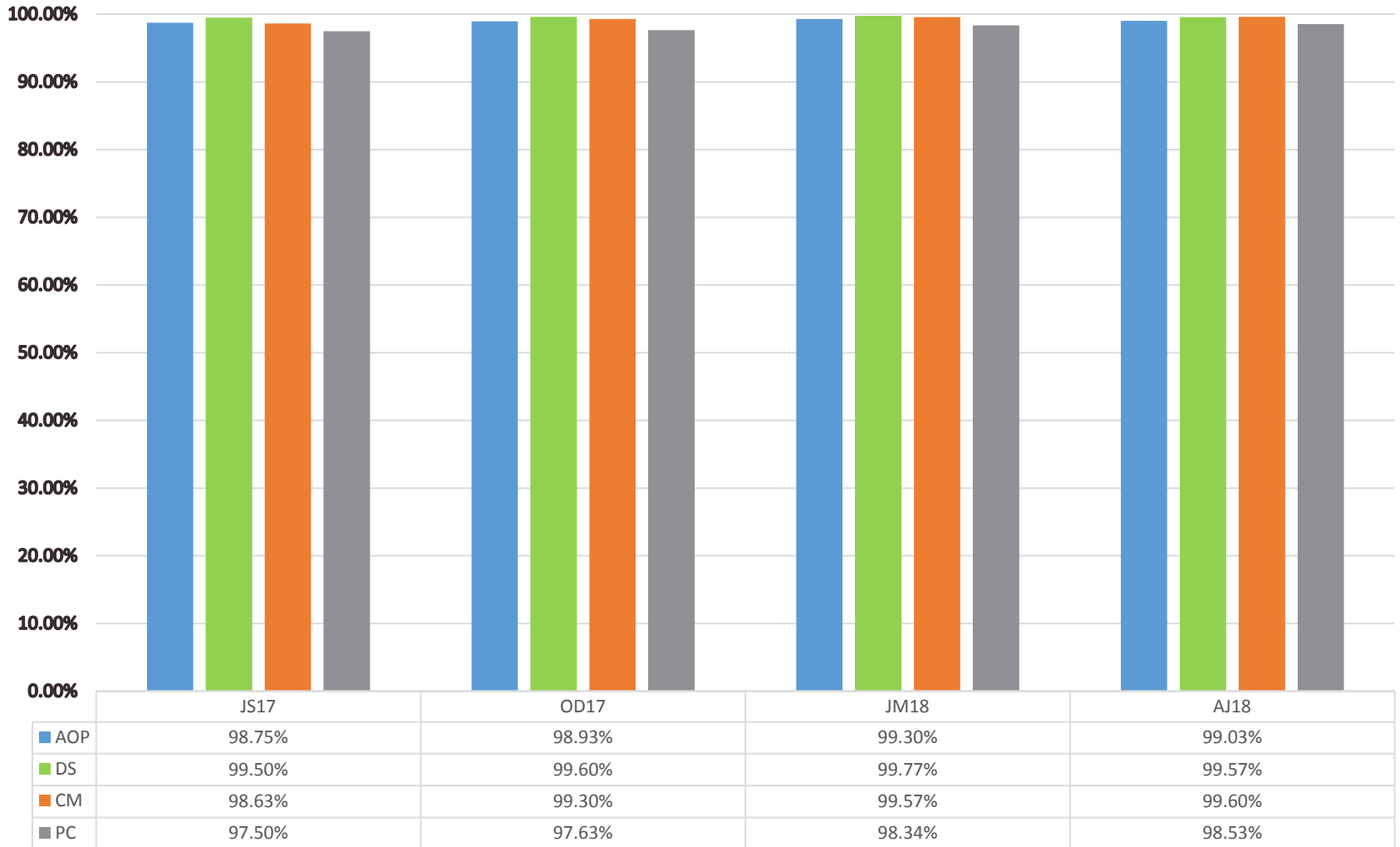| Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll		new@enhancement.com	Enhancement, New	10/01/2018		✖
❶ District Payroll		awesome@stuff.com	Stuff, Awesome	10/02/2018		✖

Action: Edit [▼]

Edit staff:

❶ There is currently a substitute in the position.

- Easy Alerts!

Compliance, SPLs, Calendars, and Shifts

Michigan does a great job with RMTS Compliance.

Statewide Compliance

	JS17	OD17	JM18	AJ18
■ AOP	98.75%	98.93%	99.30%	99.03%
■ DS	99.50%	99.60%	99.77%	99.57%
■ CM	98.63%	99.30%	99.57%	99.60%
■ PC	97.50%	97.63%	98.34%	98.53%

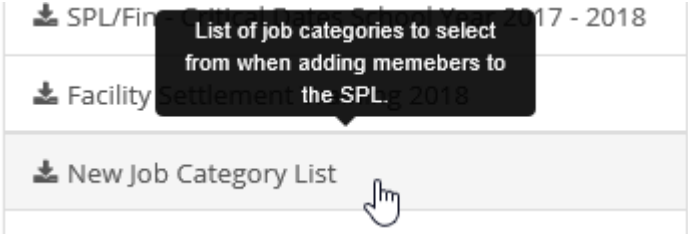# Preparing the October – December 2018 Staff Pool List

AOP

Direct Service

Personal Care

Targeted Case Management

Note: Updated job categories since April – June 2018. For full list and details, visit the "Resources" section of the Claiming System!

SPL/Fina...or, 2017 - 2018

List of job categories to select from when adding memebers to Facility Settlement the SPL.g 2018
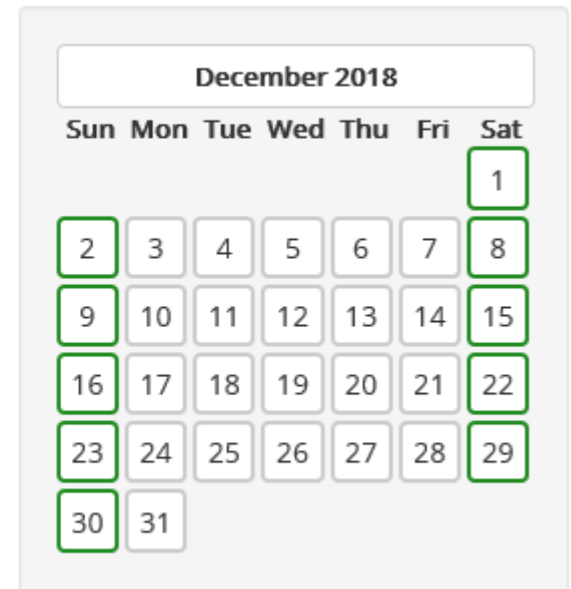
New Job Category List

Creating Your Calendar

Options

- Early Release – Moments are sent out and must be completed
- Teacher In-Service Work Day – Moments are sent out and must be completed
- Holiday/Non-Work Day – Moments are NOT sent out

Feedback

- Do you like the current options/method?
- Is there something you would change?

Have you talked to your LEAs about Shifts?

Most LEAs only have one Shift. → This implies that all schools and staff in the LEA work the same schedule.

Creating multiple, customized Shifts homes in on working time. → This increases the accuracy of the RMTS and can improve compliance and the time study results.

Note: Shifts are an optional feature LEAs can take advantage of. PCG will always encourage using shift, but never requires it.

Financial Collection: Support Staff

Financial Collection: Support Staff

- Financials for Support Staff requires entering of percentage allocation.

- This indicates to the system that costs should be carried over into the claim and allocated to a specific cost pool.

- The allocation percentage can range between 0 – 100

- *Optional Update: Option to create a warning if there is 0 percentage entered*

Current

% Allocation	
AOP:	0
TCM:	0
Personal Care:	0
Direct Service:	0
Total Percent:	0

Financial Collection: Support Staff

% Allocation

AOP:	50
TCM:	0
Personal Care:	0
Direct Service:	0
No Cost Pool:		(Required)
Total Percent:	50

Percents must total to exactly 100

Prompted to enter percentage

Eliminates Zero % error

% Allocation

AOP:	50
TCM:	0
Personal Care:	0
Direct Service:	0
No Cost Pool:	50
Total Percent:	100

Would this be a positive change for users?

Informative Guides

Informative Checklist for RMTS

❑ Check your staff: correct cost pool? Appropriate credentials? State and local funds?

❑ Review your Vacancies
    ❑ **No first or last name of (Vacancy, Vacancy)**

❑ Review staff email addresses and names

❑ Review your Shifts:
    ❑ Create more Shifts as needed
    ❑ Assign staff to appropriate Shifts
    ❑ **No staff assigned to inactive Shifts**

❑ Review your Calendar

Due September 7 (SPL and Calendar Due Date)

❑ Connect with IT about RMTS notifications

❑ Talk to staff about the RMTS

Recommended by October 1, but it's never too soon or too late

Informative Checklist for Financial Reporting

❑ Enter salary staff costs?

❑ Enter contractor costs?

❑ Enter support staff costs?

   ❑ Remember allocation is important for costs to carry over to the summary page.

❑ For all costs, confirm accuracy, cash-basis accounting, and federal funds.

❑ Do you have an E-Signature Form on file?

❑ Are the financials certified?

Due Friday, November 16

❑ Review or confirm edit checks?

❑ Review LEAs for the verification process?

Audit Assistance!

Before we wrap up, any questions?

Contact us

miaop@pcgus.com

877-395-5017

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