Commonwealth of Virginia

Medicaid and Schools Program

How to Complete LEA Eligibility Matching

forHealth CONSULTING ™ at UMass Chan Medical School

Department of Medical Assistance Services

Cardinal Care
Virginia's Medicaid Program

Welcome and Housekeeping Notes

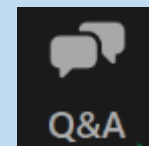_for_Health™ CONSULTING at UMass Chan Medical School

My name is Emily Hall. My team at ForHealth Consulting at UMass Chan Medical School administers the Medicaid and Schools Program on behalf of DMAS in Virginia.

Please remain on mute during the presentation to reduce background noise.

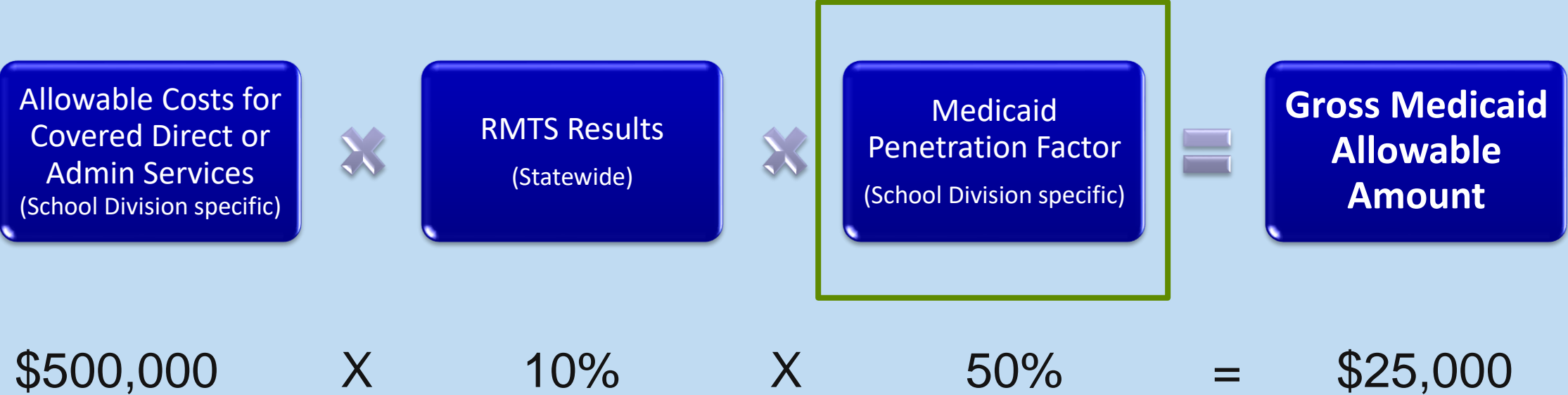If you're accessing audio via your phone, *6 will mute and unmute.

Please take a moment to locate the Q&A feature on the Zoom toolbar where you can post questions.

Learning Objectives

- Understand why an accurate eligibility match is important

- Understand how the results of the eligibility match are used in the reimbursement process for AAC and for the Direct Medical Services Cost Report

- Know the timeframes and deadlines involved

- Understand how to complete an eligibility match using the web-based system

- Gain some helpful tips and tools to ensure that your school division is maximizing your AAC and Cost Report reimbursement through employing a robust matching process, while meeting all program requirements

Eligibility Matching – Why?

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Cost-Based Reimbursement Methodology

Allowable Costs for Covered Direct or Admin Services (School Division specific)	✕	RMTS Results (Statewide)	✕	Medicaid Penetration Factor (School Division specific)	=	Gross Medicaid Allowable Amount
$500,000	X	10%	X	50%	=	$25,000

Significant impact on reimbursement!

Before you can begin...

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Before any school division can begin utilizing the web-based eligibility matching system, the following items must be in place:

1. Privacy & Security Agreement with UMMS directly

2. Designee form to designate any staff to be given login access to the website and permission to perform eligibility matching tasks on behalf of the school division. There are 2 separate eligibility roles indicated on the form:

   - **Eligibility Uploader**: Creates a school division student roster in correct upload format and template and uploads the file to the matching system

   - **Eligibility Reviewer**: Reviews the matching results, reviews possible matches and other scenarios requiring school division decision and manual intervention to complete the match

   - Roles can be assigned to the same person or to different people

   - Multiple users may be assigned if needed

Medicaid Eligibility Matching

- Medicaid Eligibility Matching is integral to the Medicaid and Schools Program.
- School Divisions will need to complete a minimum of 5 matches per year as of defined effective or snapshot dates.

DMAS Eligibility Effective ("snapshot") Date	Fiscal Quarter	Results Used in (AAC / Cost Report)	School Division Students to be Included	School Division Student Enrollment Effective ("snapshot") Date
September 1	Q1 (7/1-9/30)	1st Quarter AAC	Division-wide total enrollment	September 1
December 1	Q2 (10/1-12/31)	2nd Quarter AAC	Division-wide total enrollment	December 1
December 1	Q2 (10/1-12/31)	Annual Cost Report	Dec. 1 Special Education Child Count	December 1
March 1	Q3 (1/1-3/31)	3rd Quarter AAC	Division-wide total enrollment	March 1
June 1	Q4 (4/1-6/30)	4th Quarter AAC	Division-wide total enrollment	June 1

Eligibility "Snapshots"

The CMS-approved reimbursement methodology prescribes the use of a "snapshot" in time on one day of the claiming period to calculate the Medicaid Penetration Factor to be used for that period.

Therefore, the Medicaid Eligibility Matching system compares:

*Includes all children age 2 through their 22nd birthday enrolled in Medicaid (including FAMIS) a of the snapshot date

Medicaid Enrollment File

School Division Enrollment File

*Includes all students enrolled in the school division as of the snapshot date

Eligibility "Snapshots"

Matching Illustration:

School Division Enrollment File	DMAS Enrollment File
1. Apple, Amy A; dob 1/1/11; F	Apple, Amy A; dob 1/1/11; F
2. Banana, Bert; dob 2/13/12; M	No matches
3. Carrot, Carl; dob 7/2/13; M	Carrot, Carl; dob 7/12/13; M
4. Eggplant, Ella; dob 6/3/10; F	Eggplant, Ellen; dob 6/3/10; F
5. Fig, Fiona; dob 3/18/09; F	No matches
6. Garlic, Gary; dob 3/22/18; M	No matches
7. Lettuce, Lucy; dob 4/10/18; F	No matches

Understanding "Snapshot" Data

Understanding the "snapshot" data – an example:

In my student enrollment file, my student Fiona Fig is a student that I know is enrolled with Medicaid. So why didn't the system find a match?

- **Possibility #1:** Fiona's name, dob, gender is too different from Medicaid's enrollment file information for it to match successfully.

  <u>School Division Info:</u>   <u>DMAS Info:</u>

  Fig, Fiona; dob 3/18/09; F   Onion-Fig, Flora; dob 3/18/09; F

- **What can I do?**

  - Try adding the Medicaid ID to your school division enrollment file to increase the chance of getting at least a "possible match"

  - Use the "individual override" option to match with her Medicaid ID

"Snapshot" Example

Understanding the "snapshot" data – an example, continued:

- **Possibility #2:** Fiona's enrollment with DMAS was not "active" on the day that the snapshot was generated
  - Eligibility can sometimes be retroactively reinstated
  - Eligibility can also be retroactively terminated
- **What can I do?**
  - Try adding the Medicaid ID to your school division enrollment file to increase the chance of getting at least a "possible match"
  - Use the "individual override" option to match with her Medicaid ID
  - If neither of these options yields a match, then you know that some kind of retroactive activity occurred or the child simply was not eligible for Medicaid on the snapshot date. There's nothing more to do. This student cannot be counted as "eligible" in your claim statistics.

Student Roster Matching Instructions

As a Medicaid Coordinator (or other designated eligibility uploader or reviewer) my best friends are the instruction guides!

- Find what you need on the DMAS website page that's dedicated to Medicaid school-based services: https://www.dmas.virginia.gov/for-providers/school-based-services/

- For Medicaid Eligibility Matching, refer to the "***Medicaid Eligibility Matching User Guide***"

  - Step-by-step instructions

  - Screenshots to help you follow along

  - Sample reports

DMAS Website

Medicaid and Schools program information is easy to find on the DMAS website. You don't have to remember the link, simply navigate to:

https://www.dmas.virginia.gov

- Providers
  - School Based Services
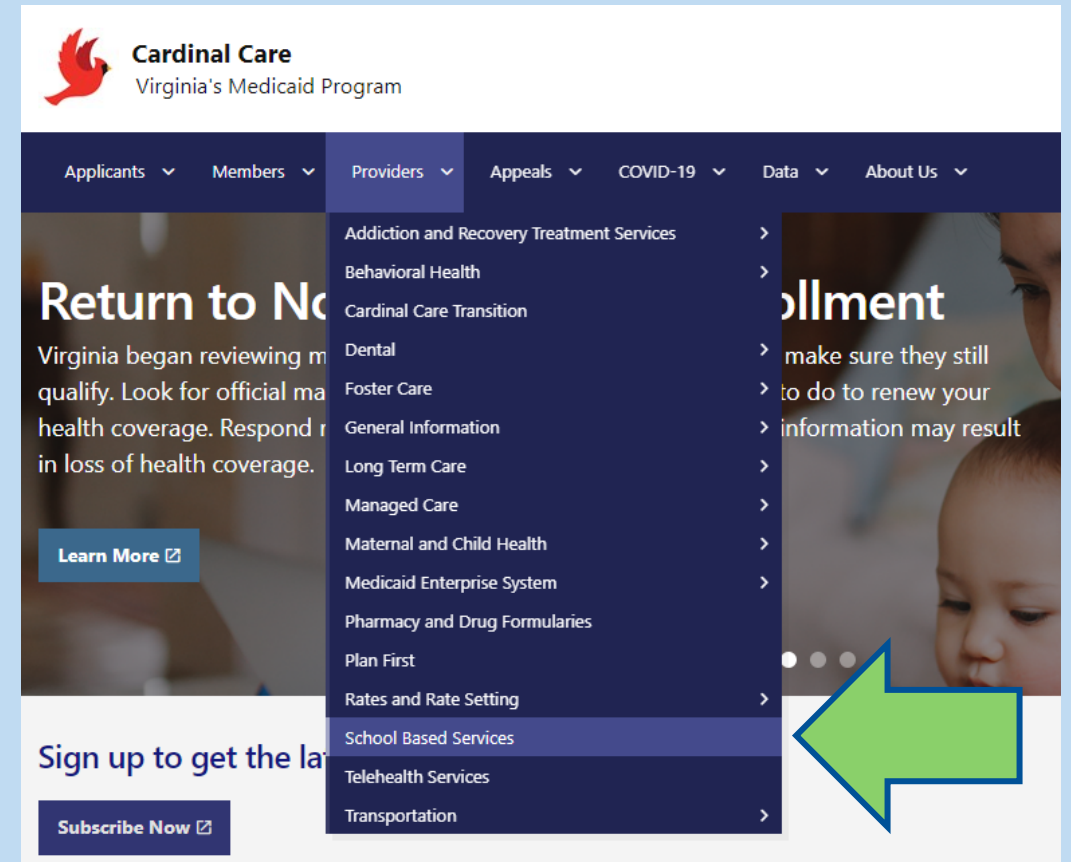
School Division Enrollment Roster

School Divisions upload their school-wide rosters including:

1. Student Name

2. Unique student ID

3. DOB

4. Gender

5. Address

6. Special Education Status

7. Medicaid ID ("RID") – if known

8. Optional Field

Rosters must be run using a 'snapshot' of the School Division's enrollment effective as of the 1st day of the 3rd month of the quarter
(3/1, 6/1, 9/1 and 12/1)

Student Roster Upload Process

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Create and upload an Excel file including the required data using the correct file format and headings. Use the provided template to reduce the likelihood of formatting errors.

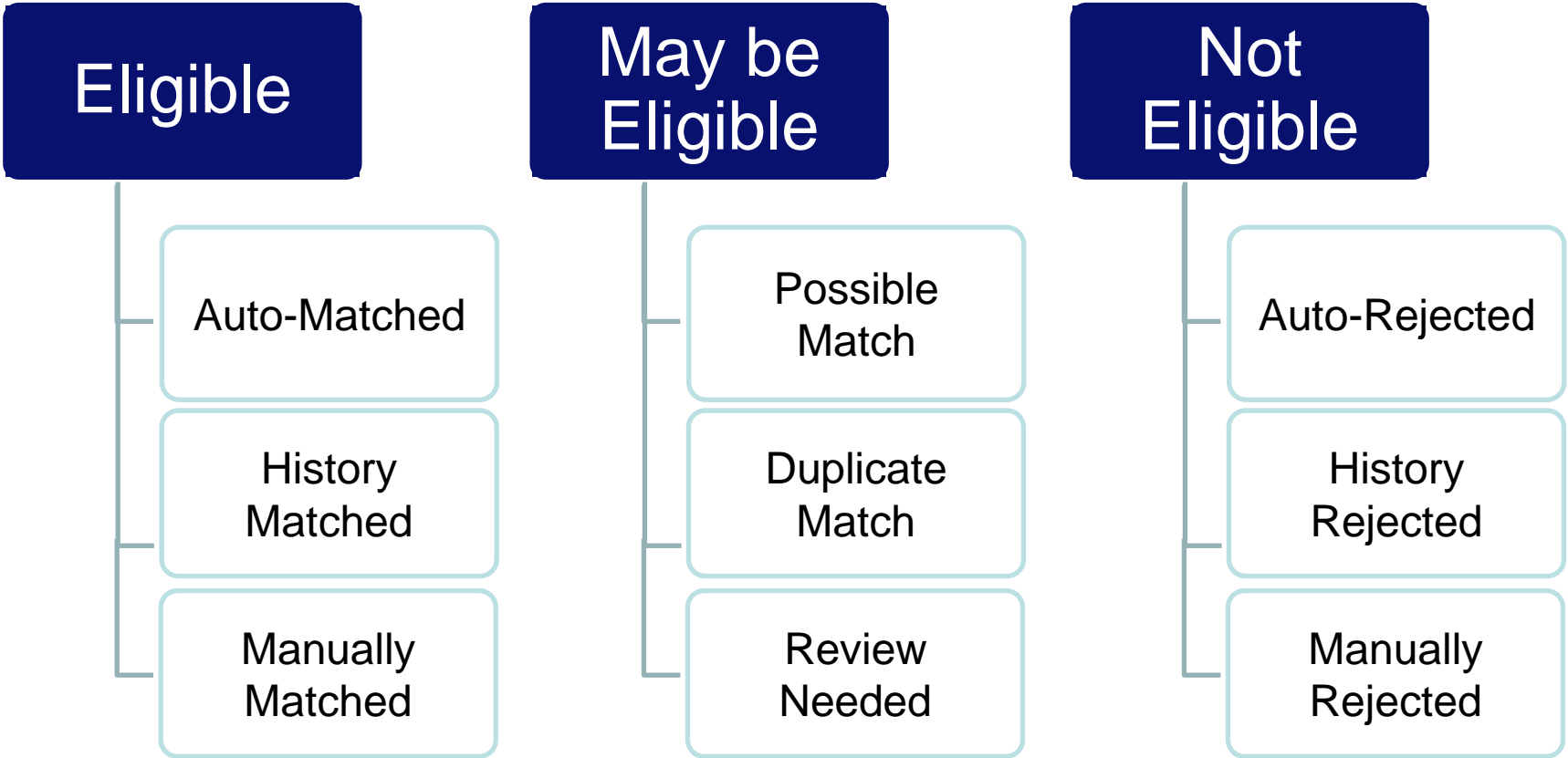| Student Unique ID	RID	Last Name	First Name	Middle	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip code	SPED	Optional
20	Apple	Amanda			1/8/2006	F	148 Summer Street		Richmond	VA	23225	N	
9	Banana	Betty			12/20/2008	F	4 West Street		Richmond	VA	23224	N	
22	Ginger-Root	Gregory			1/8/2006	M	1400 Surf Drive	Apt. 19B	Richmond	VA	23225	Y	
24	Grape	Alexandra			1/28/2009	F	98 Jenny Lane		Richmond	VA	23222	Y	
1	Green	Lucy			10/20/2003	F	392 Lilac Lane		Springfield	VA	22150	Y	IEP Student
14	Grey	Lucinda			10/22/2001	F	100 Pine Avenue		Springfield	VA	22150	Y	
30	Hamburger	Harold			9/21/2002	M	209-B Brick House Ln		Richmond	VA	23229	Y	IEP Student
32	Homerun	Bradley			6/6/1999	M	490 Stadium Way		Richmond	VA	23231	Y	
29	Hotdog	Herman			8/22/2002	M	99 Pajama St		Richmond	VA	23228	Y	IEP Student
17	Kiwi	Georgie			1/8/2006	M	101 Sydney Lane		Richmond	VA	22079	Y	Parental Consent Y
25	Lemon	Larry	P		2/8/1999	M	15 Seagull Lane		Richmond	VA	23224	Y	
28	Lettuce	Louisa Jane			8/14/2001	F	892 Train Track Lane		Richmond	VA	23227	Y	IEP Student
23	Nectarine	Nancy			11/18/2006	F	52 Bay Blvd		Richmond	VA	23221	N	
11	Onion	Kim			11/12/2001	F	79 Park Ave		Richmond	VA	23224	Y	Parental Consent Y
5	Orange	Ollie			6/22/2003	M	34 South Streeet		Springfield	VA	22079	Y	
13	O'Reily	Linda			6/12/2002	F	200 S. Pineapple Way		Springfield	VA	22079	Y	Parental Consent Y
15	Parsely	Paul			1/8/2006	M	500 Winter Street		Richmond	VA	23224	N	
27	Peach	Morgan			7/12/1999	F	87 Main St, Unit E		Richmond	VA	23226	Y	IEP Student

Student Roster Upload Process

After successfully uploading file, the system verifies the file and completes the match

State	School District

Your file has been queued for processing. The application will:
- Verify that data is in the proper format
- Upload the information
- Perform the automated matching process

The time needed to perform these steps will vary depending upon the size of your file and the number of other files that are in the queue.

*Year : [2016 ▾]
*Quarter : [1 ▾]
*School District : [A B C Public Schools ▾]
*File Path : [Choose File] No file chosen   [Upload]

Today's Upload:

Refresh   Delete

1

School District	File Name	Year	Qtr	Upload Date ▼	Status	Record Count	Download	Uploaded By	☐
A B C Public Schools	SMM_SDVA_4981243_1_2016_01.XFR	2016	1	09/12/2015 05:42:56 PM	Queued			AudetteE	☐

Matching Process

The system matching process separates students into these categories:

Eligible	May be Eligible	Not Eligible
Auto-Matched	Possible Match	Auto-Rejected
History Matched	Duplicate Match	History Rejected
Manually Matched	Review Needed	Manually Rejected

Matching Status Definitions

Auto Matched: These students were an exact match to a recipient in the DMAS eligibility file.

Manually Matched: These students were manually matched to a recipient in the DMAS eligibility file.

History Matched: These students exactly matched a pair of records (School Division record and DMAS eligibility file record) that was previously manually matched.

Possible Matched: These students are close matches to one or more students in the DMAS eligibility file. Further review is required by school division personnel.

Review Needed: These students were not manually matched or manually rejected. The school division reviewer assigned these records for further review.

Auto Rejected: These students were not matches or even possible matches to any recipient in the DMAS eligibility file.

Manually Rejected: These students were manually determined not to match any recipient in the DMAS eligibility file.

History Rejected: These students exactly matched a pair of records (School Division record and DMAS eligibility file record) that was previously manually rejected.

Duplicate Matched: These students are close matches to one or more students in the DMAS eligibility file. Further review is required by school division personnel.

Live Demonstration

Tips & Best Practices

Duplicate Matches

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Always process your duplicates first!

Possible Matches

Review the Possible Matches & make the matching decisions

Review Needed Process

Review Needed is a way to set records aside for a more indepth review later or by another person. But matching decisions must be made before you mark the review complete.

| School Division: | A B C Public Schools | | Year: | 2016 |
| File Name: | SMM_SDVA_4981243_1_2016_01.XFR | | Status: | Review in |

Retrieve Records marked for 'Review Needed' and indicate the matching decisions

Matching Status: Possible Match ▼
Possible Match
Manually Matched
Manually Rejected
Review Needed

First Name:
Gender:

Match	Non-match	Review Needed	RID	Last Name	First Name	Middle Name	DOB	Gender	Address Line 1	Address Line 2	City	State
		☐		Lemon	Larry	P	02/08/1999	M	15 SEAGULL LANE		RICHMOND	VA
☐	☑		104006677811	Lemon	Larry	L	02/08/1999	M	24 CLOUDY STREET		RICHMOND	VA
☐	☑		104556677811	Lemon	Larry	G	02/08/1999	M	77 SESAME STREET		SPRINGFIELD	VA
		☐		Nectarine	Nancy		11/18/2006	F	52 BAY BLVD		RICHMOND	VA
☑	☐		100006685111	Nectarine	Nancy	N	11/18/2006	M	52 BAY BLVD UNIT B		RICHMOND	VA
		☐		Redd	Patricia		10/05/2001	F	19 NORTH STREET		RICHMOND	VA
☐	☑		900046782361	Redd	Patricia	J	10/05/2000	F	970 LEMON LANE		SPRINGFIELD	VA

Review Complete | Save | Reset | Close

Individual Override

You can "un-match" a student from any "matched" status

Individual Override

You can "match" a student from any "un-matched" status

Individual Inquiry

You can look up a single student at a time using the Individual Inquiry

History Matching

The system remembers the history of manual matching decisions from one quarter to the next

1. Records left in 'Possible Match' or 'Review Needed' status are not considered in history matching

2. In order for a pair (School Division record compared to DMAS record) to be either 'History Matched' or 'History Rejected', the exact same pair must occur in a future quarter (Name, DOB & Gender)

3. 'Manually Matched' and 'Manually Rejected' pairs are remembered by the system and considered in history matching

   - If any of those data elements changes on either the School Division record or the DMAS record, the system will not apply history matching

Summary Report

	A	B	C	D	E	F	G	H	I	J
1	**School Based Medicaid Eligibility Report**									
2	**Summary Report**									
3	**Effective Date:**	12/01/2016								
4	**Run Date:**	06/09/2017								
5	**Run Time:**	08:48:16 AM								
6	**School District:**	ABC Public Schools								
7	**File Name:**	SMM_SDVA_4979036_2_2017_99_20170609084814.XFR								
8	**Number of Records in SD file:**	6563								
9	**File Status:**	Finalized								
10										
11										
12		**AUTO MATCHED**	**MANUAL MATCHED**	**HISTORY MATCHED**	**POSSIBLE MATCH**	**REVIEW NEEDED**	**AUTO REJECTED**	**MANUALLY REJECTED**	**HISTORY REJECTED**	**Record Count**
14	**Medicaid**	2567	3	176	0	N/A	N/A	N/A	N/A	2746
15	**Expansion**	347	1	22	0	N/A	N/A	N/A	N/A	370
16	**FAMIS**	199	0	12	0	N/A	N/A	N/A	N/A	211
17	**Total**	3113	4	210	0	N/A	N/A	N/A	N/A	3327
18										
19										
20	**Administrative Claim Data**									
21										
22	Total Students	6563								
23	Total Eligible Students (Excluding FAMIS)	3,116								
24										
25	Medicaid Eligibility Rate:	47.48%								
26										
27	**Cost Report Data (Q2 Only)**									
28										
29	Total Medicaid Students	2,746								
30	Total Expansion Students	370								
31	Total FAMIS Students	211								
32	Total Students	6563								
33										
34	Medicaid Eligibility Rate:	50.69%								

The sum of Auto Matched + Manual Matched + History Matched = Total Eligible

Note that all Q2 files will include this response section. The system does not know if the file being matched is your 12/1 child count file or not, so this section is always displayed on a Q2 match.

Matching Results Export

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School Division data appears on the left

Matching DMAS data appears on the right

School Division Upload File												DMAS Eligibility File			
ne	First Name	Middle Nai	Date of Birth	Gender	Address Line 1	Address Line :	City	State	Zip	SPED	Optional		RID	Last Name	First Name	Mid
	AMANDA		01/08/2006	F	148 SUMMER STREE		RICHMOND	VA	23225	N			100006655111	APPLE	AMANDA	A
OOT	GREGORY		01/08/2006	M	1400 SURF DRIVE	APT. 19B	RICHMOND	VA	23225	Y			100006677111	GINGER-ROOT	GREGORY	A
	LUCINDA		10/22/2001	F	100 PINE AVENUE		SPRINGFIELD	VA	22150	Y			109036767664	GREY	LUCINDA	+
E	POLLY		12/21/1999	F	774 BASKET STREE		RICHMOND	VA	23224	N			100001111111	PINEAPPLE	POLLY	E
RRY	SALLY		01/08/2006	F	43 BEACH STREET		RICHMOND	VA	23220	Y			100076676111	STRAWBERRY	SALLY	S
SE	TIMOTHY		01/08/2006	M	14 SANDY LANE	APT. 7	RICHMOND	VA	23222	N			100006612211	TURQUIOSE	TIMOTHY	A
	VIOLA		03/06/2005	F	66 HIGH RD		SPRINGFIELD	VA	22151	Y	IEP Student		100031355438	VIOLET	VIOLA	+
ELON	JAMIE		03/06/2001	F	662 FARM RD		SPRINGFIELD	VA	22151	Y	Parental Consent Y		100044222222	WATERMELON	JAMIE	+
	WENDY		01/08/2006	F	104 HAPPY STREET		RICHMOND	VA	23221	Y	Parental Consent Y		100006633111	WHITE	WENDY	A

Matching Results Export

Medicaid Type is identified in the DMAS record

DMAS Eligibility File

RID	Last Name	First Name	Middle Name	Date of Birth	Gender	Address Line 1	Address Line 2	City	State	Zip	Medicaid Type
100006655111	APPLE	AMANDA	A	01/08/2006	F	148 SUMMER STREET		RICHMOND	VA	23225	MEDICAID
100006677111	GINGER-ROOT	GREGORY	A	01/08/2006	M	1400 SURF DRIVE APT 19		RICHMOND	VA	23225	MEDICAID
109036767664	GREY	LUCINDA		10/22/2001	F	100 PINE AVE		SPRINGFIELD	VA	22150	MEDICAID
100001111111	PINEAPPLE	POLLY	E	12/21/1999	F	774 BASKET STREET		RICHMOND	VA	23224	FAMIS
100076676111	STRAWBERRY	SALLY	S	01/08/2006	F	43 BEACH STREET		RICHMOND	VA	23220	MEDICAID
100006612211	TURQUIOSE	TIMOTHY	A	01/08/2006	M	14 SANDY LANE		RICHMOND	VA	23222	FAMIS
100031355438	VIOLET	VIOLA		03/06/2005	F	66 HIGH RD.		SPRINGFIELD	VA	22151	EXPANSION
100044222222	WATERMELON	JAMIE		03/06/2001	F	662 FARM RD		SPRINGFIELD	VA	22151	MEDICAID
100006633111	WHITE	WENDY	A	01/08/2006	F	104 HAPPY STREET APT ‹		RICHMOND	VA	23221	MEDICAID

This is important for identifying and excluding FAMIS students from eligibility statistics for Administrative Claims

Gender Neutral Matching

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We realize that some schools aren't gathering 'M' or 'F' gender for students

How to Match:

- **Match with both!** Upload your student matching file with all your students listed twice – once with all 'M' and once with all 'F'.

  - For example: You have 500 total students to match, you would now have 500 students with 'M' in the gender field, and 500 students with 'F' in the gender field, totaling 1,000 students in your upload.

- **Review and complete the match**, as usual.

- **Remove duplicates** from the results.

  - For students that successfully matched to Medicaid eligibility, keep the student record that matched to Medicaid (either M or F).

  - For the students that did not match, keep either the M or the F (just not both)

- **Upload the final matching file** with one record for each of your students so that you have the correct DMAS gender data and you get an accurate match.

Medicaid Outreach

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- The eligibility responses for all matched students include:
  - Aid Category
  - Aid Category Description
  - Benefit Plan Start Date
- Use this information to track when families will need to renew their eligibility and conduct outreach to help those families stay enrolled

  ★ This work qualifies as a Medicaid Administrative activity and is reimbursable!

Note: *During the COVID-19 unwinding period, Medicaid enrollees are being redetermined for continuing eligibility on a different unwinding period schedule.*

Thank You

School-Based Medicaid Help Desk
1-800-535-6741
RMTSHelp@umassmed.edu