12th Annual NAME Conference

Niagara Falls, NY

September 16-19, 2014

Fall for Medicaid in Education!
WELCOME FROM THE PRESIDENT

On behalf of the NAME Board of Directors, it is both my honor and pleasure to welcome you to the 12th Annual Conference of the National Alliance for Medicaid in Education (NAME) in beautiful Niagara Falls, New York. Our Conference theme this year, “Fall for Medicaid in Education” aligns wonderfully with the words of a long-written poem about the place where we meet—a place where voices gather to be heard.

Niagara Falls is also a place where potential energy is harnessed for the benefit of others far from its falling waters. Let’s use the energy we take from the time we shared together here in Niagara to better our nation’s school-based Medicaid programs. Let’s use the energy of the Falls to charge our collective batteries, and to take that energy back to help make the potential of children with special education fully realized. Let’s channel those energies together and make our time together productive—both from our planned programming and our networking at the conclusion of each day.

All of us who are enmeshed in the Medicaid-in-Education arena face daunting hurdles as we implement a program that is constantly evolving. We look at the falls and marvel as the waters that once glistened in shimmering Great Lakes reach their potential by majestically coursing over Niagara in the path onwards to the Sea…and by removing a little bit of that impediment with each drop that falls. We believe this Conference will provide information to empower you in your everyday work with students, clinicians, and of course, federal, state and local requirements. Our dedicated Conference Committee has designed four days of innovative ideas and networking opportunities for you amid a backdrop of one of the Seven Wonders of the Natural World.

Please check out the detailed Conference Program for those sessions that can help you the most in your day-to-day work. Commencing the week on Tuesday is our Academy: Introduction to School Based Medicaid session, and we adjourn the week on Friday noon with the Annual NAME Membership meeting that includes the induction of new Board Directors. In between, you will find a diverse array of events, including general sessions, breakout sessions, Town Hall meetings and two days of our popular nugget sessions, all related to Medicaid and Special Education.

On Wednesday morning, we invite you to Get Your Pink On! and participate in our 2nd annual “5K/1 Mile Fun Run/Walk/Roll” fundraiser to benefit the NAME Anysia Drumheller Memorial Scholarship, in memory of Anysia Drumheller, a long-time NAME member and former Board member. Details of the Scholarship, created by the NAME Board of Directors to honor her, are on the NAME website. Participants are asked to wear your most pink running/walking/rolling gear in honor of breast cancer awareness. If you haven’t signed up yet, onsite registration is available at our registration desk. We continue to honor Anysia’s memory by using fitness to bring about awareness.

Whether you are new to NAME this year or a seasoned veteran, we hope you find this year’s conference has something to offer you to enrich your potential. You may be looking for a session focusing on principles or best practices, or how to conduct stronger training sessions, increase efficiencies, or improve outcomes in your School Based Services Program. We think you will find our speakers and topics are the best assembly to give our membership information that is beneficial to their efforts to make School-Based Medicaid a success from California to Rhode Island, and from Montana to Arizona.

Outside the main Conference, the Conference Committee has planned several social and networking events. Please join us Wednesday evening for the Conference Welcome Reception/national block party. Options for Thursday evening include Tours of Fort Niagara and Guide Tours of the Falls. If you haven’t already prepaid separately for those Thursday social events, please visit...
our onsite registration desk – there may still be room for you. As always, we invite you to take advantage of the daily breaks between sessions and meal times to introduce yourself to a member of the NAME Board, other Conference attendees and to catch up with old friends.

Bids for the Silent Auction fundraiser to benefit a local charity open on Tuesday and the winners will be announced early afternoon on Thursday. The local charity selected this year is the **Food Bank of Western New York- Backpack Program**. Details about the charity can be found at [http://www.foodbankwny.org](http://www.foodbankwny.org). You can drop off your charity auction items at our registration desk beginning on Tuesday. Items donated and brought by **YOU** from your home state are bid on silently by Conference participants. We encourage you to fall in love with these donations and bid **often and high** to support this wonderful charity.

A small but dedicated army of NAME volunteers has spent the last year developing this incredible opportunity, so please enjoy Niagara Falls and savor the educational and networking potential it provides. When you see me (or any of NAME’s leadership) around the hotel and conference center, please stop and say hello- our organization exists to serve you, and we welcome the chance to better understand how we can harness our collective power and make our efforts a success.

Finally, after you’ve completed the annual evaluation of this Conference with suggestions for improvement, you can start planning to attend our Conference next year. NAME is excited to be hosting our next conference October 4-7, 2015 in Medicaid’s hometown of Baltimore, Maryland. We look forward to seeing you at the Renaissance Baltimore Harborplace Hotel- a literal stone’s throw from the fabulous Inner Harbor. Like the waters cascading over the Niagara Falls, we plan to reach our potential on the shores of the ocean...

Let the energy be unleashed!

Mark H. Smith (Ohio)
President,
National Alliance for Medicaid in Education
September 2014

Dear Attendees of the National Alliance for Medicaid in Education (NAME) Conference:

On behalf of the residents of Niagara Falls, I am delighted to welcome you to our city as you hold your September 2014 National Alliance for Medicaid in Education (NAME) conference hosted by the Niagara Falls Conference & Event Center.

NAME was formed the purpose of providing an information network among professionals working in the nation’s state Medicaid, education and local education agencies, as well as individuals, businesses or parties interested in issues pertinent to reimbursement from Medicaid for school-based health & administrative outreach services which aids in boosting economies for cities, counties, and states across the country.

I am honored that you have taken the time to plan your conference in Niagara Falls, and wish you a most successful gathering.

Be sure to enjoy our legendary waterfall—experience it up close and personal. Your walk throughout the historic Niagara Falls State Park, with all its new completed restorations is enhanced by the redesign of Old Falls Street and the addition of the Niagara Falls Culinary Institute. We welcome you to all that Niagara Falls and Niagara County affords our visitors—the rich history, wonderful restaurants and attractions.

Thank you again for choosing Niagara Falls, NY to convene. Enjoy and visit us again anytime!

Sincerely,

Paul A. Dyster, Mayor
### AGENDA

#### DID YOU KNOW?
The Niagara Falls are visited by around 30 million people every year.

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<thead>
<tr>
<th></th>
<th>REGISTRATION</th>
<th>EXHIBITS</th>
<th>SILENT AUCTION</th>
<th>BREAKFAST</th>
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<tr>
<td>TUESDAY</td>
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<td>Grand Foyer</td>
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<td>(Drop off items)</td>
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<td>WEDNESDAY</td>
<td>7:00 am - 5:00 pm</td>
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<td>Grand Foyer</td>
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<td>Cataract Room</td>
<td>Cascades Ballroom I &amp; II</td>
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<td>THURSDAY</td>
<td>7:00 am - 5:00 pm</td>
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<td>FRIDAY</td>
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<td>Grand Foyer</td>
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<td>Cascades Ballroom I &amp; II</td>
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#### TUESDAY, SEPTEMBER 16, 2014

<table>
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<tr>
<th>Time</th>
<th>Event</th>
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| 1:30 pm-2:00 pm | Welcome to the Conference: Overview/Orientation  
Steven Wright (NY), Kelly Gicobbi (NY), Conference Co-Chairs |
| 2:00 pm-5:00 pm | NAME Academy: Introduction to School-Based Medicaid Experts in Special Education (IDEA) & Medicaid provide an introductory overview  
Elaine Lerner (NJ) Special Education, Jennifer Haase (MI) Local Education Agency, Melinda Hollinshead (AZ) Medicaid |
| NAME Nugget Sessions 2:35 pm-4:25 pm | Public Speaking: Managing the Terror  
Red Jacket  
Bob Bundy (AZ) |
| 2:35 pm-3:05 pm Session A  
3:15 pm-3:45 pm Session B  
3:55 pm-4:25 pm Session C | Steer Clear of the Falls: A Review of CMS’ 2013 Medicaid Fraud and Abuse Prevention Training Workbook  
• Handout – 66 page PDF  
Olmsted  
Jim Donoghue (IA) |
**Regionalization of NAME: MSP Stability and Integrity Through Ongoing Regional Alliances**
*Schoellkopf*
Chris Meroff (TX), Zach Male (TX)

**Be Your Own Auditor**
*Governor*
Megan McCann (NY), Michael Albino (NY), Lawrence Charny (NY), Cindi Clarke (NY)

**All Systems Go! Activating Your Quality Assurance Program Autopilot**
*Hennepin*
Susan Starkweather (MI)

**State Variation in Medicaid Direct Billing for IEP Services**
*Whitney*
Julia Bailer (MD)

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<th>Time</th>
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<tr>
<td>3:30 pm-4:00 pm</td>
<td>Break for Academy Attendees</td>
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<td>3:30 pm-5:30 pm</td>
<td>Light Snacks Provided for Arriving Conference Attendees</td>
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<tr>
<td>4:45 pm-5:15 pm</td>
<td>NAME Sponsorship Meeting</td>
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<td>6:00 pm-7:30 pm</td>
<td>NAME Town Hall Meetings</td>
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<td>Facilitated by NAME Regional and At-Large NAME Board of Directors</td>
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<tr>
<td>7:30 pm</td>
<td>Dinner, Networking-on your own</td>
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**DID YOU KNOW?**

**WEDNESDAY, SEPTEMBER 17, 2014**

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<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:00 am-8:00 am</td>
<td>2nd Annual Anysia Drumheller Memorial Scholarship Fundraiser 5K/1 Mile Run/Walk/Roll Wear your MOST GRAND PINK ATTIRE!</td>
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<tr>
<td>8:30 am-9:15 am</td>
<td>Welcome Mark Smith (OH), Steven Wright (NY), Mayor Paul Dyster (NY), John Hill (IN)</td>
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<td>NAME Update/Introduction of NAME Leadership Team Mark Smith (OH)</td>
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<td>Conference Overview Steven Wright, (NY)</td>
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<td>Time</td>
<td>Session</td>
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<tr>
<td>9:15 am-10:45 am</td>
<td><strong>Opening Keynote Address: “I’m Here and I’m Ready! Unleashing your Potential”</strong>  &lt;br&gt;Dr. John J. Pelizza</td>
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<td>10:45 am-11:00 am</td>
<td>Morning Break</td>
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<td>Grand Foyer</td>
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<tr>
<td>10:45 am-11:00 am</td>
<td><strong>“Hard, But Not Impossible”</strong>                                           &lt;br&gt;<em>Porter-DeVeaux</em>  &lt;br&gt;Dr. John J. Pelizza</td>
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<td>Grand Foyer</td>
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<tr>
<td>11:00 am-12:30 pm</td>
<td><strong>“Stretch Your Knowledge of Telepractice”</strong>                             &lt;br&gt;<em>Red Jacket</em>  &lt;br&gt;Cheris Frailey (MD), Sue Grogan-Johnson (OH)</td>
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<td>Grand Foyer</td>
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<tr>
<td>11:00 am-12:30 pm</td>
<td><strong>“How to Network at NAME”</strong>                                            &lt;br&gt;<em>Olmsted</em>  &lt;br&gt;Holly Christopher (TN), Melissa Christopher (TN)</td>
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<td>Grand Foyer</td>
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<tr>
<td>12:30 pm-1:30 pm</td>
<td>Lunch</td>
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<td>Cascades Ballroom I &amp; II</td>
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<tr>
<td>1:30 pm-1:30 pm</td>
<td><strong>“Drafting and Managing the RFP Process”</strong>                             &lt;br&gt;<em>Red Jacket</em>  &lt;br&gt;Matthew Flaminio (MI)</td>
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<tr>
<td>1:35 pm-3:30 pm</td>
<td><strong>“The OIG is Coming: How to Prepare and Speak to Auditors”</strong>            &lt;br&gt;<em>DeVeaux</em>  &lt;br&gt;Stacy Dye (MO)</td>
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<tr>
<td>1:35 pm-3:30 pm</td>
<td><strong>“Medicaid in Schools After the ACA (and After Free Care)”</strong>            &lt;br&gt;<em>Porter</em>  &lt;br&gt;Gregory Morris (MI)</td>
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<tr>
<td>1:35 pm-3:30 pm</td>
<td><strong>“After the Fall: Federal and State Sanctioned/Excluded Providers”</strong>    &lt;br&gt;<em>Olmsted</em>  &lt;br&gt;Lawrence Charny (NC)</td>
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<td>1:35 pm-3:30 pm</td>
<td><strong>“Advancing School Health Through Public Health and Education Partnerships”</strong>  &lt;br&gt;<em>Governor</em>  &lt;br&gt;Mary Vernon-Smiley, MD (GA)</td>
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<td>Grand Foyer</td>
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<td>3:30 pm-3:45 pm</td>
<td>Afternoon Break</td>
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<tr>
<td>3:30 pm-3:45 pm</td>
<td><strong>“Mind the Gap!”</strong>                                                     &lt;br&gt;<em>Schoellkopf</em>  &lt;br&gt;Megan McCann (NY), Michael Albino (NY), Lawrence Charny (NC), Laurie DiBlasi (CT)</td>
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<td>Grand Foyer</td>
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<td>3:45 pm-5:15 pm</td>
<td><strong>“Don’t Let Your Revenue Fall”</strong>                                       &lt;br&gt;<em>Red Jacket</em>  &lt;br&gt;Bob Bundy (AZ)</td>
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<tr>
<td>5:15 pm - 7:15 pm</td>
<td>Old Falls Street Block Party</td>
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<td>7:15 pm</td>
<td>Dinner, Networking—on your own</td>
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<td>TBD</td>
<td>Night at the Movies</td>
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**DID YOU KNOW?**

FREDERICK LAW OLMPSTED, LANDSCAPE ARCHITECT OF NIAGARA FALLS STATE PARK, ALSO DESIGNED CENTRAL PARK IN NEW YORK CITY

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**THURSDAY, SEPTEMBER 18, 2014**

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<th>Time</th>
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<tr>
<td>8:30 am-10:00 am</td>
<td>“Practitioner Panel Discussion”</td>
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<td>Christina Metzler (MD) AOTA, Laurie Ray (NC) APTA,</td>
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<td>Laurie Alban Havens (MD) ASHA, Liz Clark (CO) NASN, Lauren Holahan (NC)</td>
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<tr>
<td>10:00 am-10:15 am</td>
<td>Morning Break</td>
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<td>Breakout Sessions</td>
<td>“How Does Your Documentation System Measure Up?”</td>
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<td>10:15 am-11:45 am</td>
<td>Porter-DeVeaux</td>
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<td>Melissa Christopher (TN), Holly Christopher (TN)</td>
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<td>Breakout Sessions</td>
<td>“Increase Program Alignment: IDEA and Medicaid”</td>
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<td></td>
<td>Red Jacket</td>
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<td>Megan McCann (NY), Michael Albino (NY), Lawrence Charny (NC), Barbara Sabia (NY)</td>
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<tr>
<td>Breakout Sessions</td>
<td>“Don’t Let Your Revenue Fall”</td>
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<td>Schoellkopf</td>
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<td>Bob Bundy (AZ)</td>
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<tr>
<td>Breakout Sessions</td>
<td>“Reimbursing for Telepractice: Implications for Cost Savings,</td>
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<td>Outcomes, and Accountability”</td>
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<td></td>
<td>Olmsted</td>
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<td>Clay Whitehead (CA), Melissa Jakubowitz (CA), Mark Smith (OH)</td>
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| 8:30 am - 9:30 am | NAME Town Hall Reflections  
Facilitated by NAME Regional and At-Large Board of Directors |
| 9:45 am - 10:30 am  | NAME Town Hall Reflections: Next Steps                               |
| 10:30 am - 10:45 am | Morning Break                                                           |
| 10:45 am - 12:30 pm  | NAME Annual Membership Meeting  
Passing the Gavel and Call to 2015 NAME Conference  
Conference Concludes                       |
| 12:30 pm - 1:45 pm  | Board of Directors Meeting and Leadership Team Lunch  
(NAME members may sit in)  
Board of Directors Meeting and Conference Recap |
| 2:00 pm - 5:00 pm   | NAME Long Range Planning  
(NAME Leadership Team Only)                                   |

**DID YOU KNOW?**

ABOUT 500 OTHER WATERFALLS IN THE WORLD ARE "TALLER" THAN NIAGARA. THE ANGEL FALLS IN VENEZUELA IS TALLEST AT 979 METERS (3,212 FT.).
“WELCOME TO THE CONFERENCE: OVERVIEW AND ORIENTATION”
1:30 PM - 2:00 PM
PORTER-DEVEAUX
STEVEN WRIGHT (NY), KELLY GICOBBI (NY)

For a head start to the week, join NAME Conference Co-Chairs Steven Wright and Kelly Gicobbi as they walk you through the Conference Program; review the locations for all Conference-related materials; review the layout of the Convention Center; describe the “NAME Booth” and NAME’s “Town Hall Meetings”; talk about “things to do” in Niagara Falls; and remind NAME voting members of the NAME Board of Directors election schedule and link for voting. Plan to arrive early so you don’t miss this session!

Objectives:
1. Find all conference materials and handouts for the week online
2. Describe the purpose of the “NAME Booth” and find its location at the 2014 NAME Conference
3. Learn about fun things to do in Niagara Falls

“NAME ACADEMY: INTRODUCTION TO SCHOOL-BASED MEDICAID”
2:00 PM - 5:00 PM
PORTER-DEVEAUX
MELINDA HOLLINSHEAD (AZ), ELAINE LERNER (NJ), JENNIFER HAASE (MI)

If you are new to Medicaid-in-Education, then our Academy is for you! It is broad in scope and packed with details while small enough to allow for meaningful discussions. You will gain a basic understanding about Medicaid and Special Education, including history and federal regulations. In addition, experienced presenters will share how best to integrate both worlds in a school setting. The Academy has much to offer new staff from State Agencies, LEAs, vendors and partner organizations who want to understand the unique nuances and relationships of these two federal programs and how they work locally.

Speakers:
Jennifer Haase is the Financial Project Specialist for the Special Education and Early Childhood Services Department at the Muskegon (Michigan) Area Intermediate School District (MAISD), where she manages Medicaid reimbursement for fifteen local school districts. She trains local providers, assists office staff with program coordination and communicates current information to ensure compliance. Additionally, Ms. Haase works closely with Superintendents and Business Managers to project, reconcile and maximize Medicaid reimbursement. She is responsible for maintaining licensure, certification and approval documentation for all Special Education Personnel in Muskegon County, coordinating IDEA Grants and conducting Medicaid Quality Assurance File Reviews. Ms. Haase is in the process of finalizing the implementation of a new Special Education Case Management and Medicaid billing system for the MAISD.
**Objectives:**

1. Describe at least three of the primary features of the Medicaid Program that are pertinent to all states in the country.
2. Explain at least three of the primary features of the federal IDEA law as it applies to Special Education programs in the country’s public schools.
3. Discuss three considerations for developing a school-based billing program.

**Dr. Melinda Hollinshead** holds a Masters and a Ph.D. in Public Administration from Arizona State University (ASU), and has over 20 years of public policy experience at both the federal and state levels of government. Dr. Hollinshead currently works for the Arizona Medicaid agency, AHCCCS (Arizona Health Care Cost Containment System), as one of the Program and Policy Managers for the Medicaid School Based Claiming program. Dr. Hollinshead specializes in the areas of intergovernmental relations and social policy, and has considerable experience with policy and program analysis and evaluation primarily in the public health care arena. Prior to joining AHCCCS, Dr. Hollinshead spent several years with the Urban Data Center at ASU conducting research related to state capacity to manage social programs, as well as two years as a Legislative Assistant to U.S. House of Representatives Speaker Thomas Foley.

**Elaine Lerner** works in the New Jersey Department of Education in the Office of Special Education. Ms. Lerner is responsible for overseeing the school based Medicaid billing program on behalf of the Office of Special Education. Ms. Lerner collaborates with the Departments of Medicaid and Treasury in the implementation of New Jersey’s Special Education Medicaid Initiative program. Ms. Lerner plays an integral role in ongoing policy development by aiding in the collection of necessary information. She also communicates information regarding Medicaid billing directly to NJ school districts and state representatives, often conducting presentations to interested stakeholders. Ms. Lerner has been a member of NAME since its inception, serves on NAME’s Board of Directors as its Secretary and sits on various NAME committees.

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**NAME NUGGETS**

**“Public Speaking: Managing the Terror”**

**RED JACKET**

**Bob Bundy (AZ)**

You’ve been asked (or told) to give a 20-minute presentation to a group of school administrators or teachers....or the school board. What’s your first reaction? For most people, their first reaction is to begin stoking the fires of their anxiety, slowly building until it’s a raging inferno the day of the presentation! Even if you’re terrified of public speaking, there are ways to manage your fear and give a terrific presentation. Take a few minutes away from parental consent, FMAP, and Medicaid audits to learn ways to increase your confidence and be more effective when giving presentations.

**Objectives:**

1. Learn strategies to help minimize their anxieties around presenting.
2. Build a plan to prepare for their presentations.
3. Structure their presentation to maximize its impact on the audience including incorporating A/V and handling audience questions.

**Speaker:**

For many years, **Bob Bundy** was the President of a school Medicaid billing and consulting organization that provided services to school agencies around the country. Mr. Bundy has worked with school agencies and State departments on school Medicaid policies, procedures, and program improvement. He is a regular presenter at national and State School Medicaid meetings. He is recognized for his real-world application of complex concepts and humorous presentation style. He has over thirty years’ experience in high-tech services organizations and over a decade in educational services and brings a broad background of solutions design and innovation to his organization and the customers they serve.
**“Steer Clear of the Falls: A Review of CMS’ 2013 Medicaid Fraud and Abuse Prevention Training Workbook”**

**Olmsted**

**Jim Donoghue (IA)**

CMS' 2013 Medicaid Fraud and Abuse Prevention Training Workbook and the accompanying PowerPoint Presentation slides will be reviewed. Come see how you can build or update your organization’s Fraud and Abuse Prevention training program. Section 6032 of the Deficit Reduction Act mandates that any provider entity who is paid $5,000,000 or more in one federal fiscal year must present to their state Medicaid Program Integrity office, within 90 days, their organization’s written policies and procedures for all employees, including management and contractor’s employees, for detecting and preventing fraud, waste, and abuse. Why wait? Be prepared before you reach the falls!

**Objectives:**
1. Identify CMS’ 3 Medicaid Fraud and Abuse Prevention Lessons.
2. Build a Fraud and Abuse Prevention Training presentation.
3. Correctly answer CMS’ Workbook 3 Learning Questions.

**Speakers:**

Jim Donoghue has been a member of NAME since 2008 and is the NAME Board Region II Education representative. Mr. Donoghue holds a master’s degree in psychology and works as a consultant at the Iowa Department of Education where he provides technical assistance for Iowa’s IEP, school health center and IFSP Infant Toddler Medicaid programs. He has worked in higher education as a university lecturer, in mental health services both in directing a psychiatric emergency team and in private practice, and in the insurance/managed care industry in contracting, utilization management and quality improvement. Mr. Donoghue has co-authored papers in Psychological Reports, Educational and Psychological Measurement, Journal of Psychology and Journal of Mental Health Administration and published a chapter on methamphetamine in a nursing textbook on adolescent substance abuse.

**“Regionalization of NAME: MSP Stability and Integrity Through Ongoing Regional Alliances”**

**Schoellkopf**

**Chris Meroff (TX), Zach Male (TX)**

A discussion on the benefits of an ongoing forum for regional members of NAME to share best practices among MSP stakeholders within their state and region throughout the year. Illustrative issue-electronic signature in Texas now allowed due to NAME support and governmental affairs campaign

**Objectives:**
1. Learn of recent developments that have allowed NAME to offer support to region or state-based alliances.
2. Progress in the Texas Alliance for Medicaid in Education, and the impact it has had for ISD’s participating to the MSP in Texas.
3. Progress in the Ohio Alliance for Medicaid in Education, and the impact it has had for school districts participating to the MSP in Ohio.
4. Methodology that will allow participants to mobilize legislative, executive agency, and school district support for MSP Program Integrity in their home states.

**Speakers:**

Chris Meroff was born in Cape May, New Jersey and raised in southern New Hampshire. Growing up, he began a lifelong love of sports and played on his high school teams. He went on to study Business Administration at Bob Jones University and the University of Massachusetts in Lowell, Massachusetts. He serves at MSB as Executive Director and is passionate about creating client evangelists by solving problems for school districts. He has over 20 years of experience with the Medicaid to Schools Program and has helped to pioneer the program in many states.

Zachary Male was born in West Virginia and raised in southern Ohio. The son of a school superintendent and a speech therapist, he grew up learning the importance of public schools serving students with special needs. Mr. Male has always had a passion for government affairs, politics and campaigning, which led him to attend The Ohio State University, where he graduated with a double major in History and Political Science. Over the years, he has worked and campaigned for elected officials and advocated for public education. At MSB, Mr. Male is passionate about helping schools get the most out of the Medicaid to Schools program. He helps to keep key government officials aware of the importance of these reimbursements for schools.
Nobody likes surprises in a Medicaid audit! Avoid being caught off guard by performing regular self-audits and internal reviews. A self-audit looks at a sample of paid claim data, and is a great tool for assessing potential risk areas and impact. An internal review can be done for targeted areas or look at the program more broadly. Once you have a format in place, the process is quick and the benefits are significant. Participants will learn easy step-by-step methods for all three kinds of internal audits and reviews, and hear case studies from districts that use these methods successfully.

**Objectives:**
2. Learn a step-by-step process for targeted internal review (specific requirement, example is USO/UDO documentation).
3. Learn how to approach a broad-scope internal review, and how findings can be used to improve processes that support Medicaid.

**Speakers:**

**Megan McCann** has five years of experience providing consulting services to school districts in nine states regarding program management for fee-for-service, administrative claiming, and cost reconciliation methodologies for school-based Medicaid claiming. Ms. McCann designs and manages Medicaid claiming and IEP software solutions that promote compliance and support cost recovery. She is currently the Product Manager for Medicaid Direct software in New York and Connecticut.

**Michael Albino** is the former Director of Audit Resource Management for the NYS Office of the Medicaid Inspector General (OMIG), and has over 35 years of experience in fee-for-service and cost-based Medicaid reimbursement. Starting in 1993, he was involved in the implementation of SSHSP, and, as Director of Audit Resource Management, he oversaw the transition of OMIG’s role in SSHSP from focusing on program policy and oversight to being the primary agency responsible for auditing school-based Medicaid claims. Mr. Albino is a founding member of NAME.

**Lawrence Charny** worked for 25 years in special education programs for the New York City Department of Education (NYCDOE) as a teacher, supervisor and school principal. Since that retirement he has been involved with Medicaid claiming for school-based related services services for over 15 years. He was retained by the Chief Financial Officer, the Office of Legal Services and the Office of Special Education Initiatives to work with outside counsel to direct the efforts to collect and review documents needed to substantiate Medicaid claims dating back to 1990, in response to a series of federally conducted audits by Centers for Medicare and Medicaid Services (CMS) and the Department of Justice (DOJ). Mr. Charny presently works as a consultant with the Centris Group providing guidance in quality assurance oversight of compliance requirements. He has worked with the New York City Center for Charter Schools to develop a feasibility study on Medicaid claiming for eligible students in NYS charter schools. He serves on the Communications Committee and the Governmental and Legislative Issues Committee of the National Alliance for Medicaid in Education (NAME) and is a member of the Health Care Compliance Association (HCCA).

**Cindi Clarke**, as a Regional Information Center Medicaid in Education Specialist, Ms. Clarke has developed a strong working relationship with New York State Education Department and the Monroe region’s school districts, county and agencies. Ms. Clarke became a member of the Medicaid team in 2009, worked extensively with SED and regional Providers as the NY State Plan Amendment was adopted, and now serves as a valuable resource to the Providers in the Monroe region. To help increase regulatory compliance and claiming accuracy, Ms. Clarke provides Medicaid 101, Medicaid web reports, and Medicaid software training, creates help documents and gives technical assistance on Medicaid systems used by the region’s Providers.
If the thought of a Medicaid audit scares you more than a ride over the falls in a barrel, you might need help with your QA Plan. We will show you some simple strategies you can use right away to help you organize your QA processes and put your plan into action.

**Objectives:**
1. Develop a QA framework by mapping the program rules and requirements with QA tasks.
2. Organize QA effort into manageable components.
3. Establish and implement a peer review program.

**Speaker:**
Susan Starkweather has worked as a Medicaid Coordinator for an intermediate school district in Michigan. She currently serves as a project manager for CompuClaim and manages new project implementations and also provides support and compliance services to clients in Alaska, Illinois, Kansas, Michigan, New Mexico and North Dakota.

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Children with disabilities receive a variety of health services in schools as a result of the Individuals with Disabilities Education Act, which provides limited funding for these services. As a result, states often turn to Medicaid for funding. States have significant autonomy in developing a school-based Medicaid program, resulting in a great deal of variation between states in the IEP related services covered by Medicaid. The presentation will discuss the variation in covered services between states, identify the categories of services with the greatest variation, and describe how this variation relates to Medicaid reimbursement.

**Objectives:**
1. Describe variation across states in Medicaid school-based covered services.
2. Identify key categories of variation (e.g. Occupational therapy, behavioral health services, speech therapy).
3. Assess the relationship between Medicaid school-based covered services and Medicaid reimbursement.

**Speaker:**
Julia Baller, BA, is a PhD Candidate at Johns Hopkins Bloomberg School of Public Health. She received her BA in cognitive sciences at Washington University in St. Louis. Prior to beginning the PhD program at Johns Hopkins, Ms. Baller was an Intramural Research Training Awardee at the National Institute of Mental Health in the Genetic Epidemiology Branch. Her dissertation is focused on Medicaid financing for school-based health services. Her research interests include child and adolescent mental health, and the intersection between child health and social policy.
NAME TOWN HALL MEETINGS
6:00 PM-7:30 PM
REGION 1: RED JACKET, REGION 2: OLMSTED, REGION 3: PORTER

Each year, the NAME Conference seems to fly by, and in spite of several opportunities during the week to network with our peers, we often wish we’d spent more time discussing major issues with each other. This session intends to provide you with just that chance. Organized by NAME’s three geographic regions (a map of the NAME regions is located in your Conference Program), attendees will be encouraged to reflect on issues or events in their state programs, bring up new topics for consideration, or review those that arise every year. Several questions will be available for each region to consider and the NAME Board of Directors hopes to send registrants some topics and issues before you arrive, so you may come prepared to discuss. Each Regional meeting will be led by members of the NAME Board of Directors, and the recommendations for next steps and/or action will be reported out to the entire group later in the Conference. Bring your creative ideas, data, concerns, suggestions for action, stories of success, and actively participate! The Town Hall meetings begin on Tuesday, and wrap up on Friday.

NAME is organized into three geographic regions:

Region I - Connecticut, Delaware, District of Columbia, Kentucky, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, North Carolina, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia and West Virginia

Region II - Alabama, Arkansas, Florida, Georgia, Illinois, Indiana, Iowa, Louisiana, Michigan, Minnesota, Mississippi, Missouri, Ohio, Oklahoma, Puerto Rico, Texas, U.S. Virgin Islands and Wisconsin

Region III - Alaska, Arizona, California, Colorado, Hawaii, Idaho, Kansas, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oregon, South Dakota, Utah, Washington and Wyoming
**Keynote Address: “I’m Here and I’m Ready! Unleashing Your Potential”**

9:15 AM-10:45 AM

CASCADES BALLROOM I & II

**Speaker:**

Nationally known, Dr. Pelizza is a leading authority on wellness, change process, stress management, productivity, team building and personal growth. He is a dynamic speaker to over 3,500 businesses, professional and civic groups throughout North America. John J. Pelizza, Ph.D., received his Bachelor of Science Degree from Pittsburg State University, Pittsburg, Kansas and his Master's Degree from Temple University, Philadelphia, Pennsylvania. John received his Doctor of Philosophy Degree from the University of New Mexico at Albuquerque, Albuquerque, New Mexico. The founder of Pelizza & Associates, an organization designed to help people grow personally and professionally, Dr. Pelizza has dedicated himself to helping others . . . feel BETTER and do BETTER -- to helping people maximize their personal wellness and growth. John is the former hospital wellness director and former chairman of Health Education, The Sage Colleges, Troy, NY. He is currently a Professor of Health Education at The Sage Colleges. John is a recipient of the "Outstanding Young Alumni Award" from Pittsburg State University, Pittsburg, Kansas. He was the creator and presenter of a weekly radio segment, "Pelizza's Positive Principles" and has been the guest on several Radio and TV shows. John is also a member of the National Speakers Association.

<table>
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<tr>
<th>Session Descriptions &amp; Speakers</th>
<th>Wednesday, September 17th</th>
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<td><strong>Did You Know?</strong> 3,160 tons of water flows over Niagara Falls every second</td>
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The goal of this workshop is to help participants learn how to increase their happiness level. Participants will learn how to prevent negative stress (distress) and increase positive stress (eustress). Specific techniques for dealing with stress will be demonstrated. Participants will learn how to deal with difficult situations and populations. Participants will also learn what motivation is and what keeps an individual motivated and its relationship to stress. Analysis of how stress impacts an individual’s family, personal and professional growth will be provided.

Speaker:
Dr. Pelizza
Refer to Page 15 “I’m Here and I’m Ready! Unleashing Your Potential” for speaker bio.

In this session, participants will learn about the practice considerations, and reimbursement issues in providing services using telepractice. The benefits of telepractice service delivery, barriers to practice, licensing considerations, reimbursement and coverage issues including Medicaid will be highlighted. Additionally, data on the success of a pilot telespeech program through a Kent State and Ohio Public Schools partnership will be reviewed.

Objectives:
1. Demonstrate an understanding of Medicaid reimbursement currently with telepractice in at least two states.
2. Identify licensure requirements and barriers to practice.
3. List at least two strategies for successful integration of a telepractice program into an education system.

Speakers:
Cheris Frailey is the Director of State Education and Legislative Advocacy for ASHA. She serves as the state liaison to the southern region by providing resources, assistance and support regarding legislative regulatory issues and guidance to state association leaders, members and government agencies. She monitors and addresses issues in telepractice and education. Ms. Frailey previously worked as a speech-language pathologist with experience in all settings. She has supervised assistants, CFs and student interns. She has co-authored several children’s games and Apps and assisted with the development of many other products currently on the market. She worked and consulted for several companies in the expansion and selection of their speech therapy product line. Working in all areas of speech-language pathology provides a depth of knowledge and understanding to her role with ASHA.

Sue Grogan-Johnson, Ph.D., CCC/SLP is an assistant professor in speech-language pathology at Kent State University, Kent, OH. She teaches courses in pediatric and adult language disorders and directs the school-based telepractice project at the university. Beginning in 2007, Dr. Grogan-Johnson worked to develop and implement a school based telepractice project designed to provide speech-language therapy services by live, interactive video conferencing to school-age students in rural school districts in Ohio. Originally funded by the Ohio Department of Education, this project also investigates the efficacy and effectiveness of services provided through telepractice. Dr. Grogan-Johnson has co-authored several articles regarding results from the school-based telepractice project as well as providing numerous presentations at ASHA, and state conferences. She is also assistant coordinator of the ASHA Special Interest Group on Telepractice.
I’m here, now what? Conference attendees benefit greatly from networking with peers from other states with similar programs. But it is difficult to find those peers! This session will be a facilitated networking session. Participants will be grouped by commonalities in their programs. Groups may include “Cost-Based Reimbursement Programs”, “Currently working on SPA/Just finished SPA”, “MAC Programs”, “Managed-Care States”, Statewide Program States” “District-Run Program States”, “Programs less than 5 years old”, etc. Attendees will be encouraged to participate in the group that most closely resembles their program/concern. Make the most of this opportunity to learn with other attendees!

**Objectives:**
1. Identify and meet conference attendees from other areas with similar programs.
2. Establish relationships for future communications, during the conference and after.
3. Identify resources in the NAME community.

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Meet colleagues from Arizona, Massachusetts, and Michigan, and learn about the approaches these states have proactively taken to help ensure school-based services program compliance at all levels. State and LEA representatives will share best practices for supporting system-wide program integrity and meeting Medicaid rules and regulations.

**Objectives:**
1. Use at least three techniques to prepare for an audit of your program.
2. Learn best practices for preventative quality assurance practices in your MAC, FFS and Cost settlement programs.
3. Learn about audit findings nationally and how to help prevent them in your state.

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**Speakers:**

- **Melissa Christopher** has worked as an Occupational Therapist since 1991 in a variety of settings, and started Stellar Therapy Services in 2001. The company was originally a therapy staffing service, and expanded into school district staffing and Medicaid billing shortly thereafter. In addition to managing Stellar’s 100 staff members, Ms. Christopher provides consultative and clinical guidance for the company’s Medicaid reimbursement program, currently implemented in 27 of the school districts in Tennessee. Based on having worked in dozens of different facilities as a therapist, all using different methods of documentation, Ms. Christopher assisted in creating a user-friendly and Medicaid compliant web-based documentation system specifically designed for therapists in school districts.

- **Holly Christopher** has been Chief Financial Officer of Stellar Therapy Services since 2003, and was instrumental in developing the first successful Medicaid Reimbursement Program for Tennessee School Districts. Ms. Christopher provides technical assistance for program implementation and development to 27 school districts in Tennessee. Stellar Therapy Services offers consultative services to school districts, specializing in clinical supervision, therapist retention/satisfaction, best-practices for OT, PT, and Speech services in schools, Medicaid compliant documentation, and program review. Ms. Christopher assisted in designing a user-friendly and Medicaid compliant web-based documentation system designed for therapists in school districts.

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3. Learn about audit findings nationally and how to help prevent them in your state.

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**Speakers:**

- **Bryan Hawkom**, Manager, has been with Public Consulting Group (PCG) for 14 years. In that time, he has worked with school districts large and small as well as state agencies in MA, RI, NH, CT, MN, MI, NJ, PA, TX, IN, Washington DC and more. Mr. Hawkom currently oversees PCG Education’s work in the Northeast and Midwest. He holds a Bachelor’s degree in Economics and Master’s degree in Health Care Administration. Part of Mr. Hawkom’s work at PCG has focused on compliant Medicaid billing and allowable reimbursement maximization, as well as program design, rate setting, and the implementation of technology. He understands relevant state and federal regulations, as well as the challenges faced by states and school districts in implementing successful Medicaid billing programs.

- **Kathleen Cummins Merry** is the Executive Director of Medicaid Reimbursement for Wayne RESA, the largest educational service agency in Michigan. Since the onset of her position in 1994, Ms. Cummins Merry has been an integral part of the development of the Medicaid program at both the state and federal level. She sits on the School Based Services state advisory board in Michigan, and is the LEA representative for the NAME organization.

- **Dr. Melinda Hollinshead** Refer to Page 9, “Introduction to School-Based Medicaid” for speaker bio.
“DRAFTING AND MANAGING THE RFP PROCESS”  
RED JACKET  
MATTHEW FLAMINIO (MI)

Too often RFPs for IEP and / or Medicaid reimbursement programs are merely templates taken from other LEAs. Moreover, RFP responses are drafted and presented by skilled and experienced private sector experts. This presentation will give participants the tools and metrics needed to draft and manage more effective RFPs and RFQs. Topics covered will include: Pricing; Change Orders; Transition from an incumbent (timing and impact on the LEA participants); Identification of the specific account managers; diligent examination of references; SOW language; Termination arrangements; Renewal language, etc.

Objectives:
1. Draft or assist in drafting RFPs and RFQs.
2. Manage the RFP process, from examination of submissions to oral presentations.
3. Establish and maintain accountability standards when contracts are awarded.

Speaker:
Matthew M. Flaminio, Esq. is a Michigan-licensed attorney who is also admitted to practice before the United States Supreme Court, Mr. Flaminio is a specialist in Medicaid reimbursement and special education for the last sixteen years. He has worked closely with the Nebraska Association of School Boards for the expansion of the state’s school-based Medicaid program and has many years of experience providing insight and guidance to school-based Medicaid billing vendors as they have navigated the myriad of intricacies at the state and federal levels. Among his other activities, he is an active member of the National Alliance for Medicaid in Education (NAME) Government Relations Committee, American Bar Association, Michigan Bar Association, served as a panel member at a NAME Conference, and has submitted published works to the American Bar Association’s E-Privacy Project. As President, he directs and oversees all aspects of the company in matters of day-to-day management and policy decision-making.

“The OIG IS COMING: HOW TO PREPARE AND SPEAK TO AUDITORS”  
DEVEAUX  
STACY DYE (MO)

Certainly, an audit can be stressful and exhausting, but it can also be a learning experience. Surviving an audit puts project management skills to the ultimate test as one manages the requests from auditors, while also maintaining our daily work. This session will provide best practices for preparation, as well as examples of proper communication techniques. This is an interactive session with real-life audit scenarios and attendee participation.

Objectives:
1. Better prepare for a state or federal audit of their program(s).
2. Avoid missteps when speaking to auditors and providing data/materials.

Speaker:
Stacy L. Dye brings 32 plus years of Medicaid healthcare claiming experience working in the school, office, hospital and transportation sectors. She founded Claim Care, Inc., a Missouri based Women-owned Business Enterprise (WBE) in 1991. Exclusive to Missouri, Claim Care, Inc., addresses the specific needs of Missouri public schools claiming Medicaid school-based reimbursement for services provided in Missouri. Ms. Dye is responsible for overall management and operations of her company with a specific focus on enhanced provider screening. She has been involved with the National Association of Medicaid in Education (NAME) since 2006 and was a previous LEAnet sponsor in 2009. Ms. Dye is an active associate member of the Missouri Association of Rural Education (MARE) believing all willing qualified providers/school districts, rural and urban, deserve the opportunity to participate in the Medicaid program. Ms. Dye is a former faculty member for the National Association of Claims Assistance Professionals (NACAP) receiving national recognition by Kiplinger’s Retirement Letter, Home Office Computing, Woman’s Day, The Business Radio Network and others for her previous work with older adults, cancer and dialysis patients and their families.
This session will focus on two areas – First, the impact of Obamacare on school health programs - removal of the cap, removal of the pre-exiting conditions denial, impact of new Medicaid populations, which states are playing and which are not, new Health Home opportunities, Medicaid reimbursement for preventative services, cross-over between "new" Medicaid and CHIP, and Second, an update on the campaign to remove the free care rule and TPL from the school billing environment and its potential impact on §504 children. Links to resources and sites for updates will be provided.

Objectives:
1. Analyze and report on the impact of the ACA and other Medicaid changes affecting school-based health programs.
2. Track the impact of those changes in both national and state jurisdictions and on the participant’s own LEA, if appropriate.
3. Track the campaign to eliminate free care and TPL and be able to analyze and report on the impact those changes could make in both state and LEA (as appropriate) Medicaid reimbursement programs.

Speaker:
Gregory Morris, B.A., Stanford; J.D., University of Santa Clara. Law clerk with the California Supreme Court. Senior positions with nearly a dozen school Medicaid consulting companies; co-founder and Executive Director of LEAnet; presenter at the last 10 NAME conferences; consultant on state-level Medicaid in schools projects in Wyoming, New Mexico, Ohio, and Alabama. Former local and regional elected and appointed official; Chairman of Government Efficiency Team charged with overhauling California’s health budget. Webmaster of www.leanet.org. Has practiced public policy law for more than 35 years, specializing in school-based Medicaid reimbursement and special education. Father of a special needs child.

The federal government, as do most states, maintains a constantly updated list of service providers and vendors that are excluded from claiming for Medicaid reimbursement, either directly or indirectly. This session will discuss how to access this data, how school districts can develop and efficient and timely methodology for keeping current with updated listings, the long term financial impact of not identifying an excluded provider when the name first appears on the lists, reasons why a provider would be placed on these lists, and implications, beyond Medicaid claiming, for having an excluded provider working with your student population. We will do a brief overview of the policies and practices of NYS and then open the discussion to other states and how these concerns are being addressed.

Speaker:
Lawrence Charny
Refer to Page 12, “Be Your Own Auditor” for speaker bio
Objectives:
1. Identify areas of exposure for not properly implementing a policy of sanctioned / excluded provider reviews.
2. Identify federal regulations related to Sanctioned / Excluded providers for Medicaid reimbursement.
3. Identify strategies for working with IT to develop software for exclusion data reviews.

“ADVANCING SCHOOL HEALTH THROUGH PUBLIC HEALTH AND EDUCATION PARTNERSHIPS”
GOVERNOR
MARY VERNON-SMILEY (GA)

CDC/DASH is a unique source of support for monitoring priority youth health-risk behaviors and improving healthy behaviors among children and adolescents. Schools are critical for promoting healthy behaviors, health services, and linking and referring students to health services located in the community. DASH funds state and local education agencies and national organizations to build their capacity to promote adolescent health through school-based prevention and surveillance efforts. This presentation will provide current trends in health behaviors among youth and address priorities for improving the capacity of schools to increase access to preventive health services through direct on-site services or linkage and referral to youth-friendly community-based health services.

Objectives:
1. Identify current trends in youth health risk behaviors and school health policies that impact health education and health services and improve the health of school-age youth.
2. Describe CDC’s priority approaches to improving school health education and services to reduce HIV, other STDs and teen pregnancy.
3. Identify at least two strategies that enhance collaborative partnerships with schools and community-based health service providers to reduce HIV, other STDs and teen pregnancy among school age youth.

Speaker:
Mary Vernon-Smiley, MD, MPH, MDiv joined the CDC in 1991 from Duke University Medical Center (DUMC) where she served as Assistant Professor of Pediatrics in the Department of Pediatrics and Director of Adolescent Health Programs at the Lincoln Community Health Center located in Durham, North Carolina. She completed Pediatric residency training (1976-1979) and a Robert Wood Johnson General Academic Pediatric Fellowship (1979-1981), both at DUMC. She earned a Medical Degree from the Columbia University College of Physicians and Surgeons in New York City (1976) and received the Harry S. Altman Award for outstanding accomplishments in General Pediatrics. While at DUMC she earned a Master degree in Public Health (1990) from The UNC School of Public Health in Maternal and Child Health Division at the University of North Carolina in Chapel Hill, NC. Most recently in 2012 she earned a Master of Divinity degree from the Mercer University McAfee School of Theology in Atlanta, GA. Currently, Dr. Vernon-Smiley is a Senior Medical Officer in the Division of Adolescent and School Health (DASH), Centers for Disease Control and Prevention (CDC), Atlanta, Georgia. She is responsible for providing guidance to DASH on various school health services related issues such as school-based health services and integrating medical and public health policies and practices that support the mission of DASH.
Reaching your Medicaid reimbursement potential is a challenge faced by districts right across the country, and while some of these challenges are specific to the State Medicaid Plan, most are common themes. For example: provider participation; parental consent; provider caseloads and scheduling; support from district Leadership; resources for program management; lack of visibility; provider credentials; and more. Participants will learn real-life strategies and solutions for resolving issues through case studies presented by school districts from New York and Connecticut.

**Objectives:**
1. Identify the most common challenges in reaching Medicaid reimbursement potential.
2. Learn how to identify the challenges in your own district.
3. Learn real-life strategies for implementing process improvements to close the gap.

**Speakers:**
Megan McCann, Michael Albino, Lawrence Charny
Refer to Page 12 “Be Your Own Auditor” for speaker bios

Laurie DiBlasi, During her 21-year career in education, Ms. DiBlasi has served as Medicaid Coordinator for two of the largest school districts since the initiation of School Based Child Health billing in CT. She has successfully transitioned through the years of antiquated hard copy Medicaid billing to the electronic methodology most frequently used today. In addition to her extensive responsibilities, her primary focus is maximizing revenue and keeping the program “audit ready” for the Hartford Public School System. She serves as Hartford’s liaison to the Dept. of Social Services and Dept. of Administrative Services and works closely with other participating local Education Agencies. She was instrumental in successfully petitioning a change to Connecticut State Law eliminating the need for a Physician’s Substantiation. In addition to her wealth of knowledge and experience, her compassion, sense of humor, and resiliency allow her to guide and support a multitude of practitioners in Hartford’s Public School system.

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No school district/LEA participates in school-based Medicaid hoping to get a fraction of the available reimbursement. But maximizing program revenue requires careful planning and constant review. The only ways to maximize your Medicaid Program revenue are: Maintain compliance, Monitor and measure your program continually. This session will present best-practices and real-life examples of both areas that all LEAs can apply immediately to maintain their compliance and maximize their program revenue.

**Objectives:**
1. Receive examples of reports they can review to monitor their program.
2. Understand the planning and allocation of time required to maximize program revenue.
3. Receive compliance checklists that they can use as a starting point and adapt to their own LEA/state-specific needs.

**Speaker:**
Bob Bundy
Refer to Page 10, “Public Speaking: Managing the Terror” for speaker bio.
### “Student Confidentiality: How HIPAA and FERPA Guide School Health Practice”

**Olmsted**

**Tia Campbell (VA)**

This presentation provides information on the privacy laws governing confidential health records in the health care and educational settings. Basic history and components of the laws will be discussed and barriers impacting student health will be explored.

**Objectives:**
1. Define HIPAA and FERPA.
2. Discuss similarities and differences in the two privacy laws.
3. Discuss the implications of confidentiality laws in the school setting.

**Speaker:**

Tia Campbell received her diploma in nursing from Richmond Memorial Hospital School of Nursing in 1983. In 1985 she received her bachelor of science in nursing from the Medical College of Virginia and completed her master of science in nursing, with a concentration in nursing education from Walden University in 2008. Ms. Campbell joined the Division of Special Education and Student Services at the Virginia Department of Education as school health specialist in August 2005. She provides technical assistance and training to 132 school divisions regarding school nursing, school health issues, homebound instruction, Family Life Education, School Health Advisory Boards, and Medicaid billing in schools. Ms. Campbell is a National Board Certified School Nurse and served as Vice President of the National Association of School Nurses from 2010-2014. She received the 2012 Walden University Outstanding Alumni Award for promoting social change. In 2014 she was inducted as a Fellow in the National Academy of School Nursing.

### “The 2013 NAME Survey: Using Data to Navigate Around Hazardous Currents”

**Porter-DeVeaux**

**Amy Edwards (VA), Alicia Neumann (CA), Rick Jacobs (IL)**

NAME’s Biennial Survey is an important resource in supporting NAME’s mission of advocating program integrity for Medicaid School Based Services, informing Medicaid and Education officials and assisting policy makers to evaluate program and policy changes that improve Medicaid School Based Services. The NAME Survey assists in assessing the past effectiveness of Medicaid School Based Services and provides insights that can shape program and policy decisions for the future. This session is designed for those participants who are eager to understand national and state-by-state trends and to discover where Medicaid School Based Services in your state may or should be headed.

**Objectives:**
1. Compare their state Medicaid School Based Services Program with national statistics and data from other states.
2. Learn about major trends and identify program changes that may affect their state.
3. Identify best practices and opportunities for improvements in Medicaid School Based Services Programs.

**Speakers:**

Rick Jacobs is a Fairbanks LLC Principal based in Washington, DC. Mr. Jacobs has more than 25 years of experience in government, health care and consulting with governmental and non-profit organizations. Mr. Jacobs is a former Principal of Deloitte Consulting LLP and Managing Director of its School Based Health Services practice. Mr. Jacobs provides policy and risk management support to all Fairbanks projects and by maintaining a local presence in the nation’s capital enables Fairbanks to keep current on policy and program issues. This benefits state and local agency clients by helping them to ensure that approved methodologies and principles are followed to maintain program integrity and manage risk. By bringing health care and Medicaid experience as a hospital administrator and government official to clients, Mr. Jacobs enables Fairbanks to fuse national issues with state and local best practices. Mr. Jacobs earned both a Masters of Public Administration (MPA) degree and a Masters of Regional Planning (MRP) from the Syracuse University Maxwell Graduate School of Citizenship and Public Affairs, and graduated cum laude from Temple University with a Bachelor of Arts in American Studies.

Alicia V. Neumann, Ph.D., M.P.A. is a public health and policy consultant. Her work on NAME’s Education and Research Committee is an integral part of her work with Paradigm Healthcare Services’ Policy Division. This division is dedicated to identifying obstacles and opportunities to improve reimbursement claiming for schools and making this information available publicly. Prior to consulting, Ms. Neumann worked in policy and planning for the San Francisco Department of Public Health and, among other responsibilities, coordinated the County’s MAC and TCM reimbursement systems. She has supported school and community programs through numerous audits, and is currently working to help schools improve their coordination of mental health services.
Amy Edwards has worked with Medicaid and Schools for 22 years. She was hired in 1992 by the Hanover Regional Grant to work with four Virginia counties to implement the Medicaid and school billing program. In 1999, she was hired by the Virginia Department of Education as the Medicaid Specialist. Her duties include working closely with our state Medicaid agency on such issues as memorandum of agreements, development of new school division Medicaid billable services, program requirements, and the State Plan Amendment. The State Plan Amendment involves reimbursement methodology issues, program requirements, and participating in meetings with the Centers for Medicaid and Medicare. She also works with parental consent issues regarding Medicaid and Schools. Ms. Edwards works directly with local school divisions to enhance their Medicaid billing program which includes regional trainings and state-wide annual Medicaid and schools program training.
This panel of Related Service Providers or RSPs (representing our national professional associations for Occupational Therapy-AOTA, Physical Therapy-APTA, School Nursing-NASN and Speech-Language Pathology-ASHA) will provide attendees with an overview of the role each health care profession serves in educational settings. Each representative will likely address some aspect of model school-based therapy and nursing programs, documentation, medical necessity, practitioner credentialing, coordination of school-based services, and emerging practice trends, like telehealth services. The majority of the session will be reserved for responding to questions posed by audience members.

**Objectives:**
1. Describe the role of each profession in school-based practice.
2. List appropriate credentials to bill Medicaid.
3. Identify and describe education and Medicaid compliant components of related service provider documentation.
4. Provide examples of coordinated, educationally relevant related services.

**Speakers:**
- **Elizabeth “Liz” Clark** has 20 years of experience in school-based nursing practice in Colorado. She has been a School Nurse for 20 years, and a Medicaid consultant since 2002. She received her Master’s Degree in Nursing Care of Children from the University of Colorado, Health Sciences Center in 1991. She serves as adjunct faculty for the University of Northern Colorado, School of Nursing. She was also elected to the National Association of School Nurses Board of Directors in 2012, and is serving a four year term. Ms. Clark is a member of the American Nurses Association, and a Past President of the Colorado Association of School Nurses, and is a nationally certified school nurse.

- **Laurie Alban Havens** is a seasoned professional in the fields of speech-language pathology and health care administration. She is currently Director of Private Health Plans and Medicaid Advocacy for the American Speech-Language-Hearing Association (ASHA). Her prior experience includes employment as a compliance officer, reimbursement and coverage consultant, skilled nursing facility administrator, and as a speech-language pathologist. She services as the ASHA liaison to the HAB coalition – an advocacy group dedicated to improving habilitation services coverage, as well as ex-officio to ASHA’s Medicaid subcommittee and facilitator to ASHA’s State Advocate for Reimbursement (STAR) network. She holds degrees in both speech-language pathology and health care administration.

- **Laurie Ray** has 15 years of experience in school-based practice in North Carolina. Ms. Ray has been the Physical Therapy Consultant for NC Department...
of Public Instruction (NC DPI) since 2005 and Medicaid consultant since 2006. She received her MPT and PhD (in Special Education) from UNC Chapel Hill where she is on faculty in the Division of Physical Therapy. Ms. Ray serves the APTA’s Section on Pediatrics (SoP) as Director for Region V (Southeastern) and as a Board member of SoP’s School Special Interest Group (SIG). She is a reviewer for Pediatric Physical Therapy and has presented at APTA and NAME national conferences. Laurie serves on the NAME Board as the Education-at-Large representative and chair of the Education & Research Committee.

**Christina Metzler** is the Chief Public Affairs Officer for AOTA. In this position she directs the Federal, State and Regulatory Policy Departments. Previously Ms. Metzler was Director of Federal Affairs for AOTA and has been at AOTA for twenty years. She has worked for national associations in Washington in health care, disability policy and long term services issues for over 25 years. In her current position, she is the chief lobbyist for AOTA and also runs the other government and external activities. Ms. Metzler directs these activities and the grassroots program which supports advocacy on the part of occupational therapy practitioners. She is the editor of the Health Policy Perspectives column in the American Journal of Occupational Therapy. She is also responsible for the AOTPAC, the political arm of the profession, raising funds and disbursing them to candidates for the House and the Senate who support occupational therapy.

**Lauren Holahan** has 17 years of experience in occupational therapy practice and administration in both education and hospital settings. As Occupational Therapy and Medicaid Consultant for North Carolina Department of Public Instruction (since 2007), she provides technical assistance, guidance, professional development, policy analysis/development, and workforce development services to occupational therapy practitioners and administrators in NC public schools. She recently completed a four-year term, including service as chair, for the North Carolina Board of Occupational Therapy. She is pursuing a doctorate in Occupational Science through the UNC School of Medicine, Division of Occupational Science and Occupational Therapy.

**Breakout Sessions**

**10:15 AM-11:45 AM**

**“How Does Your Documentation System Measure Up?”**

**Porter-DeVeaux**

**Melissa Christopher (TN), Holly Christopher (TN)**

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Technology changes daily – is your documentation system keeping up? Components of a good documentation program – what makes it Medicaid/IDEA compliant? HIPAA/FERPA compliant? Clinically appropriate? User-friendly? Are the providers actually using it as designed? Is there an app for that? Discussion of impact of technology on Medicaid Reimbursement documentation systems and how small changes can greatly impact results.

**Objectives:**

1. Identify traits of a Medicaid compliant

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**Speakers:**

Melissa Christopher, Holly Christopher

Refer to Page 16, “How to Network at NAME” for speaker bios.
documentation system.
2. Identify HIPAA/FERPA regulations related to online documentation systems.
3. Determine if your documentation system is as user-friendly as it can be.
4. Identify factors in development and selection of customized documentation systems.

**“INCREASE PROGRAM ALIGNMENT: IDEA AND MEDICAID”
RED JACKET**

Megan McCann (NY), Michael Albino (NY), Lawrence Charny (NC), Barbara Sabia (NY)

One of the common challenges districts face with Medicaid is the perception that participating in the program means extra work for busy service providers. But is that true? In fact, many of the IDEA-related regulations, such as provider credential requirements, orders/referrals for health-related services, documentation of evaluations, proof of related service provision, state reporting data, and quarterly progress reporting, also support the Medicaid program. In identifying and strategically communicating how IDEA requirements overlap with Medicaid, districts can improve provider participation, and increase the quantity and quality of Medicaid documentation required for claiming.

**Objectives:**
1. Identify the IDEA and Medicaid requirements that can be met with the same or similar documentation and processes.
2. Learn tips for communicating these overlap areas to district staff and service providers.
3. Discuss real-life examples with other participants and hear case studies from presenting school districts.

**Speakers:**
Megan McCann, Michael Albino, Lawrence Charny
Refer to Page 12 “Be Your Own Auditor” for speaker bios.

Barbara Sabia has been a Supervisor at Nassau BOCES for sixteen years. She began her career in Nassau BOCES supervising the installation of technology in districts along with the supervision of various student management systems in Nassau districts. Barbara is a Medicaid Trusted Agent of NY State and supervises the Medicaid in Education program in Nassau’s 56 school districts. In her role as Trusted Agent she conducts Document Reviews in various Nassau County districts, conducts Medicaid 101 and Medicaid Reports trainings, and facilitates NY State Medicaid Update trainings and focus groups. She also is presenting to district administrators and treasurers ways to maximize reimbursement when possible and review with the districts ways to correct errors that have been made in the billing and claiming system. She holds a Bachelor’s Degree in Elementary Education and a Master’s in Special Education and a Certificate in School District Administration.

**“DON’T LET YOUR REVENUE FALL”**

SCHOELLLKOPF

Bob Bundy (AZ)

No LEA participates in school-based Medicaid is hoping to get a fraction of the available reimbursement. But maximizing program revenue requires careful planning and constant review. The only ways to maximize your revenue are: Maintain compliance, and Monitor and measure your program continually. This session will present best-practices and real-life examples of both areas that all LEAs can apply to maintain their compliance and maximize their program revenue.

**Objectives:**
1. Receive examples of reports they can review to
Recent innovations in the delivery of services to special needs students are showing incredible results. Through the power of technology, students are receiving live, online therapy that is producing measurable gains in outcomes, lowered costs, and more rigorous tracking of student data. Many states have taken the lead in recognizing the promise of these innovations and have created policies that provide funding parity between in-person and online therapy services. This engaging panel features state leaders, practitioners, and researchers sharing about creating new policies that recognize the power of exciting advances in teaching and learning for special needs students.

**Objectives:**
1. Describe recent advances in educational technology and practice related to special education services and the benefits of online therapy compared to in-person therapy.
2. Identify the drivers of cost savings from online therapy.
3. Explain the accountability systems behind online therapy.
4. Summarize the research behind online therapy and student outcomes.
5. Propose new regulatory frameworks to establish funding parity for technology-enabled special education services and ensure students are getting the services available.

**Speakers:**
- **Clay Whitehead** is the Co-Founder, Co-CEO, and chief student advocate at PresenceLearning. He is also a member of the company’s board of directors. Mr. Whitehead leads the company’s school partnership efforts, driving its commitment to ensuring the best care possible for all students. Mr. Whitehead was inspired to found PresenceLearning in part by the role of technology in his own struggles with learning disabilities as a young child. His background spans consulting, successful startups, and venture capital. He holds a B.A. from Princeton University and an M.B.A. from Stanford’s Graduate School of Business.
- **Mark Smith** currently serves as the Program Coordinator for Medicaid in Schools at the Ohio Department of Education. He was worked for the State of Ohio for nearly 13 years, and is a graduate of the Ohio State University where he earned his BA and MPA.
- **Melissa Jakubowitz** is a SLT with over 20 years of clinical and managerial experience and is a Board Recognized Specialist in Child Language. She is the past-president of the California Speech-Language Hearing Association, which, with over 5,000 SLP members, is the largest SLP state association in the country. She is also active in ASHA, serving as a Legislative Counselor for 12 years. Ms. Jakubowitz began her career working in the public schools. She has also operated a successful, multi-office private practice and is a past Director of the Scottish Rite Institute for Childhood Language Disorders in Stockton.
Prior to working in Maryland, Mr. Larrimore served as a legal intern and legal fellow for members of Congress and served as a special assistant to a Governor. Mr. Larrimore is a graduate of Virginia Commonwealth University, William and Mary School of Law and is a member of the Virginia bar.

Nancy Reder has served as NASDSE’s deputy executive director and director of government relations for 14 years. She has more than 35 years of experience providing direct services to vulnerable children and families, policy analysis in human service programs and nonprofit management. She has worked on a broad array of federal legislative and regulatory issues affecting children and families, including families of children with disabilities and family economic issues. In addition to her work at NASDSE, Ms. Reder’s social work experiences include serving as a vocational rehabilitation counselor, a child welfare worker and a Title I school social worker. She served as director of social policy for the League of Women Voters Education Fund and as a senior staff member of the U.S. House of Representatives Select Committee on Children, Youth and Families. She has spoken widely on federal policy affecting children with disabilities and their families. She received her B.A. and M.S.W. degrees from the University of Michigan and her J.D. from Catholic University of America.

Dr. Luann Purcell is currently the Executive Director of the international Council of Administrators of Special Education, Inc (CASE), a division of the Council for Exceptional Children (CEC). As Chief Executive Officer of an international professional organization of school administrators whose primary responsibility is in leadership of special education programs for children, her responsibilities include: consulting and advising administrators on best practices for leadership and development of quality programs for students with disabilities; assisting members in developing networking systems through state, provincial, and country units in order to provide better services to members; advocating at the governmental level to assure appropriate legislation to facilitate the development and maintenance of quality programs for students with disabilities; and providing Keynote/breakout sessions/etc at state/provincial and regional conferences on leadership, legislative/policy updates, attitude adjustment, the passion in compassion, and other current education issues. In the last 12 years, she has keynoted and led sessions in over 38 states and 3 other countries on IDEA, NCLB and the development of proactive leadership skills in times of change.

John Hill, On April 1, 2014, John Hill became the first Executive Director for the NAME, is a founding member and a past President of NAME, and served eight years as the Chair of its Governmental Affairs & Public Relations Committee. Mr. Hill’s career has focused on state and federal-level policy affecting individuals with disabilities. He previously managed Indiana’s Home & Community-Based Services Waiver for Persons with Developmental Disabilities and served as the Director of Indiana’s Bureau of Developmental Disabilities. More recently, he worked for the Indiana Department of Education where his assignments included addressing racial/ethnic disproportionality in special education and acting as the Department’s liaison with the state Medicaid agency to enhance Indiana’s public schools’ reimbursement for medically related education services and Medicaid outreach. Mr. Hill retired from state service as the Director of Policy, Planning and Program Development with the Division of Disability & Rehabilitation Services within Indiana’s Family and
Social Services Administration. In his years of service he has provided leadership to numerous boards and commissions including serving as chair of the Indiana Commission of Rehabilitation Services on two occasions, president of the Jackson County Indiana ARC, and co-chair of the Covering Kids & Families Schools Committee. He also served on the Indiana Governor’s Council for Persons with Disabilities, Indiana School for the Blind & Visually Impaired Board, and the Indiana School for the Deaf Board.

GENERAL SESSION: “BUILDING BRIDGES: TRANSFORMING NEW YORK’S SCHOOL SUPPORTIVE HEALTH SERVICES PROGRAM”
2:45 PM - 4:15 PM
CASCADES BALLROOM I & II
JOSEPH WEBER (NY), STEVEN WRIGHT (NY), CONSTANCE DONOHUE (NY)

A panel discussion on the NY School Supportive Health Services Program (SSHSP) following the Federal audit of the program including discussion on the audit, the resulting compliance agreement, policy changes and the implementation of a certified public expenditure reimbursement methodology, including the CMS approval process. The discussion will include the perspective of the two state agencies involved in the program Medicaid (DOH) and Education (SED) as well as the perspective of 2 LEAs and the lessons learned by all entities.

Objectives:
1. Understand the significance of Federal regulations and guidance pertaining to Medicaid billing and cost settlement.
2. Identify potential audit risks before an audit occurs.
3. Learn from the experiences of NY school based Medicaid claiming.
4. Understand the multiple components of a compliant Medicaid direct service billing and cost settlement program.

Speakers:
Joe Weber, a Senior Consultant for PCG, has over nine years of experience in providing Medicaid reimbursement consulting to state healthcare agencies. Mr. Weber has a wide range of cost reporting experience from hospitals to community behavioral health providers to school based health services providers. Mr. Weber currently serves as a product line lead for PCG’s efforts related to school based health services program including DC, GA, PA, NY, NJ, and WV. He is currently responsible for managing PCG’s efforts related to school based settlement in NY, NJ, PA, and WV. Mr. Weber has a BA in Economics from the College of the Holy Cross and an MBA from Clark University.

Steven Wright has worked for the New York State Education Department for the past 20 years, most recently in New York’s school based services program. In conjunction with the New York Medicaid agency, his team oversees policy and training for this program. He holds both undergraduate and graduate degrees in accounting from the State University of New York at Albany. Over the past nine year, Mr. Wright has been active in the NAME organization as a Board Director, Treasurer and NAME’s 2012/2013 President. He is currently on the NAME Board of Directors as the Immediate Past President and is this year’s conference co-chair.

Connie Donohue is the Assistant Director of the Bureau of Medical, Dental and Pharmacy Policy in the Division of Program Development and Management, Office of Health Insurance Programs at the New York State Department of Health (NYSDOH). Her state government career includes seven years in the NYSDOH Early Intervention Program, where she helped establish and implement the statewide Newborn Hearing Screening Program, and five years at the Office of the State Comptroller, managing the Outreach Training Program. Dr. Donohue is an audiologist and co-author of a textbook that is in its second edition. She has a BS in Communication Disorders from the College of St. Rose, and MA in Audiology and Hearing Impairment from Northwestern University, and a doctorate in audiology from the University of Arizona School of Health Sciences.
# Session Descriptions & Speakers

Friday, September 19th

## Did You Know?

Four of the five Great Lakes drain into the Niagara River, (Superior, Michigan, Huron and Erie) before emptying into Lake Ontario. These Great Lakes make up almost 1/5 of the world’s fresh water supply.

## Name Town Hall Meetings: Reflections

Facilitated by NAME Regional and At-Large Board of Directors

8:30 AM - 9:30 AM

**Region 1: Red Jacket, Region 2: Olmsted, Region 3: Porter**

Join your colleagues in Part 2 of NAME members networking for learning. This edition of the Regional Town Hall meetings will allow participants to again meet in Regions; reflect and summarize the information learned and shared this week; and consider solutions to challenges with proposed action steps to implement the solutions.

## Name Town Hall Meetings: Next Steps

9:45 AM – 10:30 AM

**Cascades Ballroom I & II**

After meeting with your colleagues in the previous hour, all attendees will come together and the summaries will be shared with the entire Conference during this final Town Hall session. Dialogue and clarification will be encouraged, and the NAME Board of Directors will be listening carefully and compile the results which may be used to assist with NAME’s long range planning to set the direction for NAME in the coming year(s).

## Name Annual Membership Meeting

10:45 AM-12:30 PM

**Cascades Ballroom I & II**

The NAME Bylaws require at least one meeting annually of NAME members. During this meeting, the NAME committees will provide summaries of their accomplishments this past year; the proposed NAME Operating Budget for 2015 will be shared; NAME Board of Directors election results will be reported and the successful candidates will be installed; we will be called to the 2015 Conference, scheduled to be held in Baltimore, Maryland.
### 2014 Board and Committee Members

**Did You Know?**
The age of the falls = 12,000 years

#### Board of Directors

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<tr>
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<th>Education</th>
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#### Executive Committee

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NAME was established in 2003 in response to the need to find a national forum for addressing the increasing complexity and challenges of Medicaid in school settings. It has evolved into a clearinghouse for information in the service of helping members analyze their options in daily decision-making. NAME members from around the country are generous in sharing their expertise that comes from experience, networking and information disseminated by NAME.

**Mission**
NAME advocates program integrity for school-based Medicaid reimbursement

**Who Belong to NAME**
NAME has 265 members from 42 states and Washington DC. Our members:
1. Represent State Departments of Medicaid and Education, local educational agencies (LEAs), and dozens of businesses and professional organizations at the state and national levels.
2. Are professionals working at the state or local level who are involved in school-based Medicaid claiming for services provided to students in special education. Our members are involved in, but not limited to: Medicaid claiming and billing; Medicaid quality assurance oversight; Medicaid program development; policy making; policy implementation; and advocacy.

**What Does NAME Do?**
1. Provides professional development by sponsoring Annual Conferences in September or October
2. Hosts telephonic town meetings that focus on one specific topic at a time, allowing for dynamic interaction of participants and experts sharing news in their fields
3. Shares information with and facilitates networking among members and interested parties via the NAME website:
   - Only NAME members have access to specific information on NAME’s Members-Only website, such as: NAME National surveys, Education and Research topical conference call information, NAME Regional updates, federal and state technical advisories, audit reports, an expanding database of relevant documents for research, and links to other websites and organizations with shared interests
4. Distributes a periodic newsletter, the NAMEtag, with timely updates from a variety of sources to keep members in touch with their regions, the NAME

**DID YOU KNOW?**
The movies Niagara and Superman were filmed in part at the Falls
Conference Committee, the NAME President, and others
5. Builds relationships and partners with national professional organizations, federal agencies and others to focus on issues important to NAME members
6. Develops and conducts biennial surveys. This project gathers and interprets data and information from state Medicaid agencies, state education agencies and LEAs around the country to better understand the School Based Medicaid Program nationwide. Components include program composition, services covered and fiscal and programmatic policy. Invaluable information has been provided to the press, government agencies, policy makers and NAME members.

NAME Provides:
1. A growing directory of members to contact with specific questions
2. A research database with information on various state policies for Medicaid funding in education
3. A networking opportunity for like-minded policy makers and professionals to connect with at all levels of involvement in the unique

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