



“ACHIEVE A BIG SKY
STATE OF MIND”

N A M E

National Alliance for Medicaid in Education, Inc.

2016 NAME Annual Conference

September 18 - 21, 2016

Bozeman, MT

Platinum Sponsor



Fairbanks partners with state and local government agencies to provide solutions to support Medicaid and other claiming programs. We support program integrity and the monitoring and oversight which are integral to our clients' responsibilities and to our approach. We provide a depth of industry, programmatic and technology expertise that is dedicated to each client's success in partnership with them. Our team has designed, implemented and managed Medicaid claiming in 15 states, representing 8,000 LEAs and 10 million students for state agencies, local school districts and consortia and other organizations.

Fairbanks understands the challenges of navigating complex Medicaid policies. Our focus is not on the single-minded goal of maximizing what can be claimed from Medicaid but to enable every client to obtain all of the Medicaid reimbursement to which they are entitled while managing risk and strictly adhering to applicable guidance and regulations. We are guided by our commitment to deliver uncompromised quality and client service to our clients by providing Medicaid expertise and web-based solutions that achieve efficiency, effectiveness and exactness while enhancing program integrity and regulatory compliance.



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Program

SUNDAY, SEPTEMBER 18, 2016	
3:00 pm – 8:00 pm Best Western Ballroom Foyer	Registration
3:00 pm – 8:00 pm <u>Tamarack Room, Best Western</u>	Drop Off Silent Auction Items
4:00 pm - 6:00 pm Best Western Ballroom	<p style="text-align: center;"><u>The Academy: Introduction to Medicaid School Based Services</u></p> <ul style="list-style-type: none"> Medicaid: Shannon Huska (CO) Special Education: Elaine Lerner (NJ) Local Education Agency: Jeremy Ford (CA)
6:00 pm – 8:00 pm Best Western Courtyard Ballroom Foyer	Welcome Reception Hot hors d'oeuvres
MONDAY, SEPTEMBER 19, 2016	
7:30 am - 4:00pm Best Western Ballroom Foyer	Registration
8:00 am - 9:00am Best Western Ballroom Foyer	Breakfast
9:00 am - 10:00 am Best Western Ballroom	<p style="text-align: center;"><u>Welcome</u></p> <ul style="list-style-type: none"> NAME: Tracy Brunner (IN), Rena Steyaert (MT), John Hill (KY) Bozeman Mayor Carson Taylor, Esq. Director of Special Education, MT Office of Public Instruction, Frank Podobnik Policy Director, Department of Public Health and Human Services, Jessica Rhoades <p style="text-align: center;"><u>NAME Update/Reports from Committees/Introduction of NAME Leadership Team, 2016 Drumheller Scholarship Recipients</u> Tracy Brunner (IN)</p>

	<u>Conference Overview</u> Rena Steyaert (MT)																		
<u>10:00 am - 11:00 am</u> Best Western Ballroom	<u>Opening Keynote: The Flint Water Crisis! The Situation and Our Response</u> <ul style="list-style-type: none"> • Cherie Wager (MI), Assistant Superintendent for Special Education Services • Deb Marshall (MI), Supervisor, Student Data Management, Medicaid Coordinator 																		
<u>11:00 am - 11:15 am</u> Holiday Inn	Morning Break																		
<u>11:15 am - 12:15pm</u> Holiday Inn	<u>Regional Town Hall Meetings</u> <ul style="list-style-type: none"> • Region 1: Jefferson • Region 2: Montana-State • Region 3: Gallatin 																		
<u>12:15 pm - 1:15 pm</u> Best Western Ballroom	<u>Charity Luncheon</u> Presentation by Bozeman Area Special Education Parent Teacher Association (SEPTA), 2016 NAME Charity http://www.BozemanSEPTA.org																		
<u>1:30 pm-3:30 pm</u> Holiday Inn	<u>Nugget Sessions (repeated four times)</u> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #003366; color: white;">Session</th> <th style="background-color: #003366; color: white;">Presenter</th> <th style="background-color: #003366; color: white;">Room</th> </tr> </thead> <tbody> <tr> <td>How Would Free Care Work in my LEA?</td> <td>Bob Bundy (NH)</td> <td>Gallatin: Holiday Inn</td> </tr> <tr> <td>Incorporate Compliance into Your Daily Routine</td> <td>Nicole Ziegler (MT) Susan Starkweather (MI)</td> <td>Jefferson: Holiday Inn</td> </tr> <tr> <td>Using Software to Improve Compliance</td> <td>Brooke Denton (CA) Roger Vang (CA) Amanda Mozes (CA)</td> <td>Montana: Holiday Inn</td> </tr> <tr> <td>Managed Care and Medicaid in the Schools</td> <td>Melinda Hollinshead (AZ) Christopher Connor (MA)</td> <td>State: Holiday Inn</td> </tr> <tr> <td>Preliminary Findings, NAME Biennial Survey</td> <td>John Hill (KY) Laurie Ray (NC)</td> <td>University: Holiday Inn</td> </tr> </tbody> </table>	Session	Presenter	Room	How Would Free Care Work in my LEA?	Bob Bundy (NH)	Gallatin: Holiday Inn	Incorporate Compliance into Your Daily Routine	Nicole Ziegler (MT) Susan Starkweather (MI)	Jefferson: Holiday Inn	Using Software to Improve Compliance	Brooke Denton (CA) Roger Vang (CA) Amanda Mozes (CA)	Montana: Holiday Inn	Managed Care and Medicaid in the Schools	Melinda Hollinshead (AZ) Christopher Connor (MA)	State: Holiday Inn	Preliminary Findings, NAME Biennial Survey	John Hill (KY) Laurie Ray (NC)	University: Holiday Inn
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<u>5:30 pm</u> Meet in hotel lobby	<u>Social Activities in Bozeman</u> <ol style="list-style-type: none"> 1. Museum of the Rockies (Meet in Best Western lobby) 2. Scavenger Hunt in Bozeman and Montana State University (Meet in Holiday Inn lobby) <p>Pre-registration and payment required—See NAME Conference website</p>																		

TUESDAY, SEPTEMBER 20, 2016

<u>7:30 am - 4:00 pm</u> Best Western Ballroom Foyer	Registration																		
<u>7:00 am - 8:00 am</u> Meet in Best Western Lobby or Ballroom Foyer	<u>4th Annual Anysia Drumheller Memorial Scholarship Fundraiser</u> 5K/1 Mile Run/Walk/Roll Wear your PINKEST ATTIRE!																		
<u>7:30 am - 9:00 am</u> Best Western Ballroom Foyer	Breakfast																		
<u>9:00 am-10:00 am</u> Best Western Ballroom	Fireside Chat: An Update from <u>NAME</u> <ul style="list-style-type: none"> • John Hill (KY), Executive Director • Amy Edwards (VA), Chair, Govt. Affairs and Public Relations Committee • Shannon Huska (CO), President Elect • Elaine Lerner (NJ), Secretary • Margarita Bobe (CA), Membership Chair • Mark Smith (OH), State Education Agency At-Large Representative 																		
<u>10:05 am - 11:15 am</u> Best Western Ballroom	Practitioner Panel <ul style="list-style-type: none"> • Laurie Alban Havens, American Speech-Language Hearing Association • Shawna Rader Kelly, National Association of School Psychologists • Laurie Ray, American Physical Therapy Association • Chrissy Vogeley, American Occupational Therapy Association • Liz Clark, National Association of School Nurses • Lauren Holahan (NC), Moderator 																		
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<p><u>12:45pm - 1:45 pm</u> Best Western Ballroom</p>	<p style="text-align: center;"><u>Networking Luncheon</u> Presentations by Platinum Sponsors</p> <p style="text-align: center;">Get to know NAME Committees and their work</p>																		
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<p><u>4:45 pm - 5:30 pm</u> Best Western Ballroom</p>	<p style="text-align: center;">Silent Auction Winners Announced</p>																		
<p><u>6:00 pm</u></p>	<p style="text-align: center;">Dinner on your own</p>																		

WEDNESDAY, SEPTEMBER 21, 2016

<u>7:30 am – 10:30 am</u> Best Western Ballroom Foyer	Registration
<u>7:30 am – 9:00 am</u> Best Western Ballroom Foyer	Breakfast
<u>9:00 am – 9:30 am</u> Best Western Ballroom	<u>Closing Keynote Address: Meet the Need</u> • Charlie Siebenga (MT)
<u>9:30 am -10:30 am</u> Holiday Inn	<u>NAME Town Hall Reflections: Next Steps</u> • Region 1: Jefferson • Region 2: Montana-State • Region 3: Gallatin
<u>10:30 am – 11:30 pm</u> Best Western Ballroom	Regional Reports NAME Annual Membership Meeting Passing the Gavel and Call to 2017 NAME Conference Conference Concludes
<u>12:15 pm – 1:45 pm</u> Hyalite Room, Best Western	<u>Board of Directors Meeting and Leadership Team Lunch</u> (NAME members may sit in) Board of Directors Meeting and Conference Recap
<u>1:45 pm - 5:00 pm</u> Hyalite Room, Best Western	<u>NAME Long Range Planning</u> (NAME Leadership Team Only)

THURSDAY, SEPTEMBER 22, 2016

<u>7:30 am - 4:00 pm</u> Hyalite Room, Best Western	<u>NAME Long Range Planning</u> (NAME Leadership Team Only)
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Gold Sponsors	<p><u>Compliance Services Association</u></p> <p>Chris Hayes 208.922.9300 chayes@isbus.us</p>	
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<p><u>Sivic Solutions Group</u></p> <p>Siva Kakuturi 315.733.3200 skakuturi@sivicsolutionsgroup.com</p>		
<p><u>University of Massachusetts Medical School (UMASS)</u></p> <p>Teresa Pastore 617.886.8078 Teresa.Pastore@umassmed.edu</p>		
<p><u>Paradigm Healthcare</u></p> <p>Brooke Denton 415.489.1381 bdenton@paradigm-healthcare.com</p>	<p><u>CASE</u></p> <p>Luanne Purcell 478.333.6892 lpurcell@casecec.org</p>	
<p><u>Kinney and Assoc.</u></p> <p>Joe Kinney 518.424.1894 jkinney@kinneyassoc.com</p>	<p><u>Healthcare Billing Service</u></p> <p>Daniel Thomas 740.653.6711 DThomas@teamHBS.com</p>	
	<p><u>Schools Integrated Medicaid Solutions</u></p> <p>Ban Troung & Van Vu 916.760.7540 btroung@schoolsmed.com</p>	

General Session Descriptions

NAME Academy If you are new to Medicaid-in-Education then our Academy is for you! It is an interactive presentation that will provide a broad overview, while also addressing specific challenges inherent with implementing Medicaid in a school setting. You will gain a basic understanding of Medicaid and Special Education, and have an opportunity to ask questions relevant to integrating these two programs in the public school. The Academy's experienced presenters will provide a session that will benefit new staff from state agencies, local school districts, vendors and partner organizations who want to understand the unique relationships of these two federal programs and how they work locally, as well as provide a refresher to those attendees who are veterans of school based Medicaid programs.

Flint Water Crisis! The Situation and our Response Michigan's Genesee County Intermediate School District (ISD) provides many programs and services, and oversees 34 public school academies and local public school districts, including Flint Community Schools, the epicenter of the lead water crisis of Flint's water system that began in April 2014. Lead exposure symptoms are well documented and have lasting adverse health effects. Hear from one of the most important partners in the midst of the crisis, Genesee ISD's Assistant Superintendent of Special Education, Cherie Wager, and her Medicaid Coordinator Deb Marshall for the School Based Services Program. They will share what services GISD had in place prior to the Flint Water Crisis and how they aggressively responded to the Flint community, providing the expansion of services that were needed, while developing new strategies for the future. One part of their message will be that lead exposure or another crisis could happen anywhere.

Town Hall Meetings NAME members have two opportunities to meet with other members from their Region to discuss issues, concerns, emerging themes or other topics in the Region and/or nationally. Facilitated by the Region's Representatives to the NAME Board of Directors, the first Town Hall is early in the Conference on Monday morning to allow members to get re-acquainted and organize. The second Town Hall is one of the last sessions of the Conference to allow reflection and planning as a Region for the coming year.

Fireside Chat: An Update From NAME For several years, NAME has facilitated a discussion featuring a distinguished panel of representatives to discuss events, policies and strategies at the federal level. This year, the NAME Executive Director and Chair of the Governmental Affairs and Public Relations Committee will preside. This interactive session with NAME Leadership Team Members will review the highlights from the *Healthy Students, Promising Future Collaborative to Expand Access to School-Based Medicaid Services Convening*, which was hosted by the US Departments of Education and Health and Human Services, along with the Centers for Medicare and Medicaid Services. It was held on July 27, 2016 in Washington DC.

Practitioners Panel The members of this panel have been invited by NAME because they are leaders in their national professional associations, representing Occupational Therapists (AOTA); Physical Therapists (APTA); School Nurses (NASN); Speech-Language Pathologists (ASHA); mental health professionals (Center for School Mental Health); and the School Psychologists (NASP). These six distinguished experts will provide an overview of the role each health care profession serves in the educational settings. Each representative will likely address some aspect of model school-based programs, documentation, medical necessity, practitioner credentialing, coordination of school-based services, and emerging practice trends, such as tele-health services. As much of the session as possible will be reserved for responding to questions posed by audience members.

Closing Keynote: Meet the Need This presentation begins with the assumption that unmet needs will lead to drama and sometimes tragedy through the telling of personal stories, including where needs were met and how that led to success. You will hear how needs can be met through various sources including education and role models.

Nugget Sessions

How Would Free Care Work in my LEA? In late 2014, CMS altered its guidance surrounding free care and school Medicaid programs. At the 2015 NAME conference, free care was a hot topic but there were a lot of unanswered questions and a lot of NAME members still wondering how to implement free care in their state/local agency. This session will describe the change in CMS guidance and give examples of practical application in LEAs. It will also present areas surrounding free care and school Medicaid programs that are still not clearly defined and/or areas of caution for attendees. We will also discuss how free care has been implemented in several places and lessons that have been learned.

Incorporate Compliance into your Daily Routine Learn how to identify and remove the threats to your Medicaid program. We will cover the basic elements of Medicaid compliance and walk you through the process of developing a QA framework. Using the QA framework, you will be able to organize your compliance activities into manageable components.

Using Software to Improve Compliance Attendees will be briefed on School Medicaid Programs audit findings that are related to software performance, and methods that can be used to validate Medicaid claiming software, such as Random Moment Time Study (RMTS) software. By understanding the process of validating software (from front-end functionality to back-end data management), you will be able to make better informed decisions, protecting not only the investment in software itself, but the integrity of your Medicaid billing program as well. This session is geared toward individuals involved in evaluating RFPs or contracts with a software component, or who are responsible for ongoing program compliance.

Managed Care: What does it mean for School Based Services Moving to a managed care model for Medicaid is a trend that has seen recent momentum. Although not a new concept, many states are either establishing Medicaid managed care models or expanding their current models to include programs previously carved out of managed care. In most states with managed care, school based services have continued to be administered as a fee for services program. What does it mean when there is a proposal to carve it in? LEAs often face significant challenges resulting from the changes required to administer school based services under managed care. What LEAs should know about the implications of managed care to their school based claiming program.

Preliminary Findings, NAME 2016 Biennial Survey This session will provide an overview of the NAME Biennial Survey 2016, review the questions, survey procedures, number of respondents to date and any pertinent updates. Time will be reserved for discussion, feedback, questions and answers.

Parental Consent, HIPAA and FERPA Parental consent regulations are pretty clear as they apply to Medicaid billing. But what about Medicaid eligibility? What are the consent rules around checking eligibility? This session will discuss eligibility checking as it relates to the new consent regulations, FERPA, and HIPAA considerations and will present documented decisions/opinions that every LEA should be aware of.

10 Strategies for a Stronger, Effective Medicaid Program In this session you will learn the Top 10 basic strategies to running a strong, efficient Fee For Service Medicaid program in your school district so you receive all the reimbursement to which you are entitled. By following these steps, Topeka Public Schools was able to generate a 400% increase in Medicaid reimbursement. Participants will learn from our mistakes and successes. Although the examples are from the Great State of Kansas, most of the information should be applicable for other states.

Billing Other Insurance/ Third Liability: The Easy Way In the past two years, CMS removed the free care issue and expanded Medicaid reimbursement for all covered services delivered in schools. One remaining issue is compliance with the federally-mandated Third Party Liability (TPL) requirement. This session will outline all TPL requirements and methods for obtaining a federal waiver, using the experience of four states and ongoing discussions with CMS.

Breakout Sessions

Designing a Practical and Effective Medicaid Compliance Plan The topic of Medicaid compliance for school-based Medicaid programs can generate much debate and even anxiety. This is because Medicaid compliance requirements are generally geared towards healthcare, rather than educational organizations. Regardless, ensuring complete compliance with state and federal Medicaid laws is a critical aspect of the program; the consequences of non-compliance can have a real and significant financial impact on the school. So how do you develop, implement, and effectively maintain a compliance program in a school setting? This session will teach a proven framework for designing a school-friendly compliance program, with specific tactics and case studies for implementing the program and ensuring that it is working. Topics will include: roles and responsibilities; risk assessment in developing the compliance plan; the compliance team; effective communication and training; methods for program reviews; and corrective action plans.

School Based Telehealth Services and Medicaid Telehealth services (online high speed interactive video and remote computing applications that provide therapy services such as speech therapy, occupational therapy, and mental health services) are an innovative option for schools to meet their students' federally mandated IEP requirements. However, Medicaid is often a step behind when it comes to reimbursement for such services, inhibiting a school's ability to utilize telehealth. We will discuss the benefits of telehealth, which States have made the transition for Medicaid reimbursement and how, and what you can do in your State to secure reimbursement.

The Ever Evolving Landscape of School Based Services Requirements Maintaining program compliance is an ongoing challenge for LEAs participating in school based Medicaid. That challenge is compounded by the ever changing landscape of requirements placed on the program. New program requirements frequently result from compliance audit results or from the process for new program approvals by CMS. Participants will be introduced to three areas where new requirements are challenging states, (1) methodology and factors included in Cost Settlement, (2) Random Moment Time Study methodology, (3) coding requirements for Random Moment Time Studies. Hear from experts with a national perspective on the current changing SBS landscape, as well as from program specialists at the state level currently working through these proposed changes.

Free Care: Past, Present and Future of California School Based Health Services In December 2014, CMS issued new guidance to states regarding the Free Care Rule, potentially opening up the ability for schools to seek reimbursement for non-IEP health services for all Medicaid students. This presentation will examine California's progress towards implementing the change to free care reimbursement. Presenters will provide a timeline overview of California's progress by reviewing the current status and components of the state's Medicaid State Plan Amendment, highlight the success of stakeholder engagement and discuss some of the remaining challenges/pending questions surrounding expanding school-based health services.

Montana's School Based Services Program Montana's Medicaid School Based Health service program started in 2003. It uses a Fee for Service method of reimbursement that includes School Mental Health as well as the health related services allowed in a child's Individual Education Plan (IEP). You will hear from the State Medicaid Program Officer, the State Office of Public Instruction Special Education Director, the School Mental Health Program Officer and from the Bozeman Public School Special Education Director. The panelists will each speak of their role in the program and offer a complete picture from policy-making to describing how the program works in schools for the successful education of the children of Montana who are eligible for Special Education.

Are you Receiving all the Reimbursement Revenue You Deserve? The only way to assure successful Medicaid Program reimbursement is to maintain compliance, monitor, and measure your program continually. But such a successful outcome requires careful planning and constant review. This session will present best-practices and real-life examples of both areas that all LEAs can apply immediately to maintain their compliance and receive all the Medicaid reimbursement they deserve.

Making Sense of Free Care: Can My State Benefit? For a year and a half states have been struggling to understand the implications of CMS' reversal of their policy on claiming for Free Care services. Learn about the experiences of states that have taken the next step and have investigated the opportunities and challenges associated with the decision whether or not to expand their programs to include Free Care services. From the implications of amending their SPA and identifying services, to understanding the pool of providers and students, these states are in various stages of the process of making sense of Free Care.

We survived an OIG Audit, you can too! The Office of Inspector General (OIG) provides independent and objective oversight that promotes economy, efficiency, and effectiveness in the programs and operation of the U.S. Department of Health and Human Services. Starting in October 2013, the OIG was tasked with auditing the State of Michigan School Based Services program. This session will discuss the results of the OIG report. The presentation will include a timeline of the audit process, methodology used to conduct the audit, Michigan's steps to reduce findings, and a summary of audit results and recommendations resulting from the OIG report.

New CMS Guidelines: Big Blue Skies or Storms a 'Coming? Representatives from the Centers for Medicare and Medicaid Services (CMS) announced at the NAME 2015 Conference, that updated guidance regarding Medicaid in Schools is coming. It is expected that the new CMS guidance will transform Medicaid programs nationally. The anticipated changes will represent the most sweeping changes and significant challenges to states and school districts in well over a decade. This session will address the new Medicaid guidance from CMS that will impact all Medicaid programs and not just schools. CMS is consolidating Medicaid guidance for all state programs that claim reimbursement for administration and significant changes to approved claiming methods and procedures. Presenters will be discussing the pending CMS changes to Medicaid Administrative Claiming and how this will affect all state stakeholders. Topics covered will include: "how we know changes in program guidance are coming", "what changes in program guidance to anticipate", "how current trends in the marketplace are reflecting CMS influence", "The consequences of these programmatic changes on states and school districts." What are some of the strategies needed and implementation challenges that states will face? The session will address anticipated policy changes and how they will impact current methodologies and procedures, stake-holders use of technology and how enhanced program integrity methods will be necessary for LEAs and state agencies to prepare for, review and respond to the proposed changes, and after enacted, to comply with the final changes.

Student Success through Medicaid Supported Comprehensive School Mental Health Services Schools offer significant advantages as venues for mental health services. An extensive and under-appreciated array of Medicaid options and approaches can support positive mental health for low-income students. Medicaid resources can support universal, selective and intensive levels of surveillance, assessment, treatment and support of students' mental health issues, and CMS guidance to help states capitalize on that potential has been prolific. This breakout session will examine how Medicaid resources can support a comprehensive multi-tiered approach to student mental health using resources provided by CMS, and featuring exemplars from across the United States.

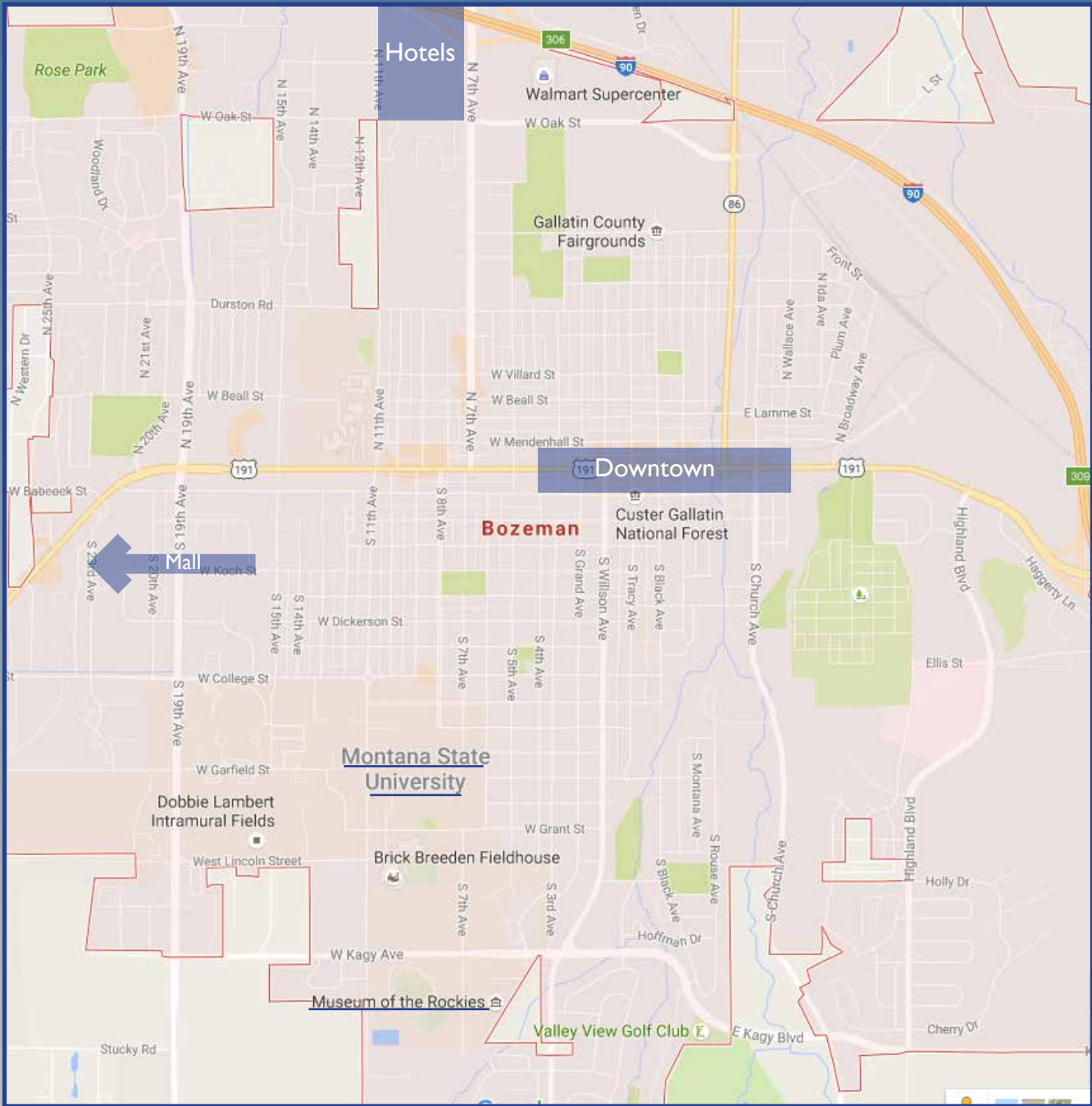
Analyzing Your Medicaid Program's Data: It's NOT Scary! You probably have a good handle on your Medicaid program revenue – but is that the only (or best) way to measure the success of your program? Besides revenue, what else should you look at? How do you use the data to make decisions? And what should you use to analyze the data you have? This session will answer all those great questions. You will have a leg up on what data to collect, analyze, and receive the tools needed to do it. This session combines two highly-successful topics from previous NAME Conferences and includes practical information that you can use such as: 1) Data to collect and analyze; 2) How to use that data to make decisions about your Medicaid program; and 3) Day-to-day use of standard Microsoft Excel® features as a data analysis tool.

Pie In the Sky: Legislation supporting School Health Services There's much to do about something in the California LEA Medi-Cal Billing Option program on the heels of successful legislation promoting free care. Come learn about successful steps taken to pass this legislation in California to optimize health services to students with medically necessary services.

School-Based Health Centers: Partners to Implement the Free Care Policy In the post free care world, schools and school Medicaid programs are thinking about opportunities to expand school health services beyond IEP/IFSP-related services. Research shows that schools benefit from providing health services to all students. School-based health centers (SBHCs) can be critical assets in partnering with school district health staff to support the health of all students. This workshop will describe the SBHC model, identify ways in which SBHC advocates are partnering with schools in the post-free-care world, and provide strategies for partnering with SBHCs to improve the health of all students.

The Power of a Strategic Plan for Medicaid Yonkers Public Schools has realized a 300%+ increase in Medicaid reimbursement over the past three years, and they are just getting started! The program's success is largely due to how the district approached the challenge. Hear directly from Lucy Scopino, the Medicaid/SSHSP Specialist for the City of Yonkers Finance Division, to learn how and why she developed a strategic plan to address the district's biggest challenges with Medicaid claiming, and what the outcome was. This interactive breakout session is presented as a case study, and will include details on the approach and specific tactics used by Yonkers Public Schools.

Become a Medicaid All-Star: A Guide to Audit Proof Medicaid Claiming In this session, we will provide Medicaid program administrators with a step by step guide to creating an audit proof Medicaid program while increasing reimbursements. This will include key activities to perform monthly to ensure all eligible services are billed, tools to ensure providers are documenting all services, and strategies for using data to identify additional reimbursement opportunities and manage compliance.



Hotels

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Montana State University

Bozeman

Museum of the Rockies

Valley View Golf Club

Walmart Supercenter

Gallatin County Fairgrounds

Custer Gallatin National Forest

Dobbie Lambert Intramural Fields

Brick Breeden Fieldhouse

Rose Park

Valley View Golf Club