

Random Moment Time Survey (RMTS) Coder Training 2024

Welcome



Department of Health Care Services (DHCS)

School-Based Medi-Cal Administrative Activities

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Purpose of this Training

- Annual training is provided for regional/county senior coding staff who will then train their primary coding staff (SMAA Manual 6-17).
- Provide guidance to assist in correctly coding all activities.
- Provide examples for coding Time Survey Participant (TSP) responses.
- Provide examples of submitting Clarifying Questions (CQ).
- Delivering Services in School-Based Settings: A Comprehensive Guide to Medicaid and Administrative Claiming 2023.

Training Overview

- Section 1: Participant Pools & Activity Codes
- Section 2: Reimbursable SMAA Activity Codes
- Section 3: Non-Reimbursable SMAA Activity Codes
- Section 4: Direct Service Activity Codes
- Section 5: Interrelated, Parallel, and Non-Parallel Activity Codes
- Section 6: Clarifying Questions
- Section 7: Moment Responses and Code Assignments

Section 1: Participant Pools and Activity Codes



Guiding Principle

- 42 Code of Federal Regulations 433.15(b)(7)
 - All activities the Secretary of Health and Human Services finds necessary for proper and efficient administration of the State Plan.

Participant Pool 1 List Direct Service Practitioners

Psychology and Counseling Services:

- Associate Marriage and Family Therapist
- Licensed Marriage and Family Therapist
- Credentialed School Counselor
- Credentialed School Psychologist
- Credentialed School Social Worker
- Licensed Clinical Social Worker
- Licensed Psychiatrist
- Licensed Psychologist
- Licensed Educational Psychologist
- Licensed Physicians
- Licensed Physician Assistant
- Registered Associate Clinical Social Worker

Participant Pool 1 List

Direct Service Practitioners

Respiratory Care Services:

- Licensed Respiratory Care Practitioner

Speech Therapy Services:

- Licensed Speech-Language Pathologist
- Credentialed Speech-Language Pathologist
- Speech-Language Pathology Assistant

Participant Pool 1 List

Direct Service Practitioners

Hearing Services:

- Licensed Audiologist
- Credentialed Audiologist
- Licensed Physician
- Licensed Physician Assistant
- Credentialed Speech-Language Pathologist
- Registered School Audiometrist
- Registered Credentialed School Nurse

Nursing Services:

- Registered Credentialed School Nurse
- Licensed Registered Nurse
- Certified Public Health Nurse
- Certified Nurse Practitioner
- Licensed Vocational Nurse
- Trained Health Care Aide

Participant Pool 1 List

Direct Service Practitioners

Nutrition Services:

- Registered Dietitians
- Certified Nurse Practitioners
- Certified Public Health Nurses
- Licensed Physicians
- Licensed Physician Assistants
- Licensed Registered Nurse
- Registered Credentialed School Nurse

Occupational Therapy:

- Licensed Occupational Therapist
- Licensed Occupational Therapy Assistant

Physical Therapy:

- Licensed Physical Therapist
- Licensed Physical Therapist Assistant

Participant Pool 1 List

Direct Service Practitioners

Targeted Case Management (TCM):

- Program Specialist
- Any practitioner with a TCM Certification Form

Vision Services:

- Licensed Optometrist
- Licensed Physician
- Licensed Physician Assistant
- Registered Credentialed School Nurse

Orientation and Mobility:

- Orientation and Mobility Specialists

Participant Pool 2 List

Administrative Service Practitioners

Direct Service Practitioners:

- Direct Service Practitioners (Participant Pool 1) that are unqualified to bill under LEA BOP (i.e. an SLPA without supervision).
- Direct Service Practitioners (Participant Pool 1) that are not providing direct billable health services.

Liaisons:

- Parent Community Facilitator/Liaison
- Community Liaison

Participant Pool 2 List

Administrative Service Practitioners

Health Care:

- Health Care Assistant/Advocate
- Health Center Staff (i.e. Manager, Secretary, Office Manager, Clerk, Assistant, Director, Coordinator, etc.)
- Health Technician/Specialist
- Health Services Special Education Teachers
- Medical Assistant
- Medical Interns

Instructors:

- Instructor, Orientation and Mobility (visually handicapped)
- Education/Instructional Aides
- Special Education Support Technician/Assistant
- Teacher – various selected positions (Special Education, alternative Education, resource, Special Day Class)

Participant Pool 2 List

Administrative Service Practitioners

Directors, Administrators, Principals and Coordinators:

- Director – various selected positions (Speech, Nursing, etc.)
- Director/Administrator – various selected positions (i.e. Mental Health, Speech, Nursing, etc.)
- Special Education Administrators
- Medical Administrative Coordinator/Assistant
- Principal and/or Assistant Principal
- Principal at Special Education Schools
- Student Support Services Coordinator/Case Manager
- Coordinator – various selected positions (Medi-Cal, Mental Health, Speech, Nursing, etc.)

Participant Pool 2 List

Administrative Service Practitioners

Clerical and Secretarial Staff:

- Office Clerical Staff (i.e. Technician, Secretary, Office Manager, Clerk, Assistant, etc.)
- Secretary, Senior Secretary
- Family Resource Center Staff (i.e. Manager, Secretary, Office Manager, Clerk, Assistant, Director, Coordinator, etc.)

Speech and Language:

- Sign Language Interpreter
- School Bilingual Assistant
- Translator; Senior Translator
- Interpreters & Interpreter Assistants

Activity Codes

- Code 1 School-Related, Educational, and Other Activities (Non-Billable)
- Code 2A Direct Medical Services (Billable)
- Code 2Z Direct Medical Services (Non-Billable)
- Code 3 Non-Medi-Cal Outreach (Non-Billable)
- Code 4 Medi-Cal Outreach (Billable)
- Code 5 Facilitating Application for Non-Medi-Cal Programs (Non-Billable)
- Code 6 Facilitating Medi-Cal Application (Billable)
- Code 7 Referral, Coordination, and Monitoring of Non-Medi-Cal Services (Non-Billable)
- Code 8 Referral, Coordination, and Monitoring of Medi-Cal Services (Billable)
- Code 9 Arranging Transportation for Non-Medi-Cal Services (Non-Billable)

Activity Codes (continued)

- Code 10 Arranging Transportation in Support of Medi-Cal Services (Billable)
- Code 11 Non-Medi-Cal Translation (Non-Billable)
- Code 12 Translation Related to Medi-Cal Services (Billable)
- Code 13 Program Planning, Policy Development, and Interagency Coordination Related to Non-Medi-Cal Services (Non-Billable)
- Code 14 Program Planning, Policy Development, and Interagency Coordination Related to Medi-Cal Services (Billable)
- Code 15 Medi-Cal Claims Administration, Coordination, and Training (Billable)
- Code 16 General Administration/Paid Time Off (Billable)
- Code 17 Not Working/Not Paid (Non-Billable)
- Code 18 Invalid Moment/No Response (Non-Billable)

RMTS Moment Notification

- RMTS moments require one student-attendance day notification and a four-student-attendance day response timeline.
- Clarifying questions can be asked within 15 calendar days from the date the TSP completed their moment response.
 - The next slide shows an example of an RMTS Moment Notification calendar for a month that does not include any weekdays and/or holidays.
- TSPs will still have 5 student-attendance days to respond to any clarifying questions.

RMTS Moment Notification Example

Month: October 2024						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Sept 30 Moment Notification	1	2	3	4 Moment Response Limit	5
	TSP needs to respond moment within 4 student-attendance days					
6	7	8	9	10	11	12
	The Coder needs to ask the Clarifying Question by October 21 (15 calendar days)					
13		15	16	17	18	19
	The Coder needs to ask the Clarifying Question by October 21 (15 calendar days)					
20	21 Asking Clarifying Question Limit	22	23	24	25 TSP Responding to Clarifying question Limit	26
	TSP needs to respond to Clarifying Question within 4 student-attendance days					
27	28	29	30	31		

Section 2: Reimbursable SMAA Activity Codes



Reimbursable SMAA Activity Codes

- Code 4 – Medi-Cal Outreach
- Code 6 – Facilitating the Medi-Cal Application
- Code 8 – Referral, Coordination, and Monitoring of Medi-Cal Services
- Code 10 – Arranging Transportation in Support of Medi-Cal Services
- Code 12 – Translation Related to Medi-Cal Services
- Code 14 – Program Planning, Policy Development, and Interagency Coordination Related to Medi-Cal Services
- Code 15 – Medi-Cal Claims Administration, Coordination, and Training
- Code 16 – General Administration / Paid Time Off

Code 4 – Medi-Cal Outreach

- Code 4 is reserved for activities that inform potentially eligible individuals about Medi-Cal programs and how to access them.
- This includes the following activities:
 - Related paperwork, clerical activities, or staff travel required to perform these activities.
 - Initiating and responding to email and voicemail regarding eligibility.

Code 4 – Medi-Cal Outreach

- Outreach materials must be approved by DHCS.
- LEAs are only reimbursed when conducting outreach for the populations served by their schools (i.e., students and their parents or guardians).
- Activities that are not considered Medi-Cal outreach under any circumstances are:
 - General preventive health education programs or campaigns addressed to life-style changes in the general population (e.g., maintaining healthy teeth and gums, anti-smoking, alcohol abstinence, etc.).
 - Outreach campaigns directed toward encouraging persons to access social, educational, legal, or other services not covered by Medi-Cal.

Code 4 Example

- Code 4

“Passed out pamphlets to students for a local health clinic that accepts Medi-Cal students and families.”

- Not Code 4

“Provided information to students about the educational assistance programs.” (Code 3)

Code 6 – Facilitating the Medi-Cal Application

- Code 6 should be used when TSPs are assisting individuals in completing the Medi-Cal application.
- Note: This activity does not include the actual determination of Medi-Cal eligibility.

Code 6 Example

- Code 6

“Discussed Medi-Cal eligibility and assisted with the completion of the Medi-Cal application with a parent.”

- Not Code 6

“Discussed the procedures for obtaining and completing a CalWORKS application with a parent.” (Code 5)

Code 8 – Referral, Coordination, & Monitoring of Medi-Cal Services

- Examples for Code 8 includes:
 - Making referrals for and/or coordinating medical or physical examinations and necessary medical/mental health evaluations.
 - Related paperwork, clerical activities, or staff travel necessary to perform these activities.
 - Initiating and responding to e-mail and voicemail for Medi-Cal covered services.
 - Following up or monitoring the status of a referral.

Code 8 – Referral, Coordination, & Monitoring of Medi-Cal Services

- The following activities **cannot** be claimed as Code 8:
 - Determining the student's placement.
 - Developing the **initial** IEP meeting goals.
 - Writing the **initial** IEP.
 - Any necessary referrals that are required for the initial IEP meeting.
 - Any coordination requirements for the assessment of the initial IEP meeting.
 - Confirming IEP meetings with the parent/guardian are scheduled.
 - Ensuring the IEP meeting is conducted.
 - Participating in the IEP meeting.
 - Ensuring Parental sign-off is obtained.
 - Completing the IEP meeting.
- These activities are considered part of the education mandate and must be coded to Code 1.

Code 8 Example

- Code 8

"I was referring the parent to a Medi-Cal physician for an evaluation based on the physical symptoms the parent explained."

- Not Code 8

"I was referring student to tutoring group for help with their math classes." (Code 7)

"I was working with the IEP team to develop IEP goals."

- Gathering and developing IEP goals are part of the education mandate, therefore making this example a code 1.

Code 10 – Arranging Transportation in Support of Medi-Cal Services

- This code should be used when a TSP is assisting an individual or family in obtaining transportation to health-related services including:
 - Scheduling or arranging transportation to Medi-Cal covered services.
 - The time spent by a transportation supervisor or staff in coordinating transportation to health-related services.

Code 10 – Arranging Transportation in Support of Medi-Cal Services

- Not included in Code 10 are the following:
 - Providing the actual transportation service.
 - Any activity that contributes to the actual billing of transportation as a medical service.
 - Accompanying the student to a Medi-Cal covered service.
 - Calling 911.

Code 10 Example

- Code 10

"Arranged transportation for a student in Medi-Cal to attend a speech therapy appointment."

- Note that if the TSP provides the detail of the nature of the appointment, they do not have to state Medi-Cal.

- Not Code 10

"Arranged medical transportation for a school sporting event."
(Code 9)

Code 12 – Translation Related to Medi-Cal Services

- This code should be used when a TSP is providing translation services as a third party to facilitate access to Medi-Cal covered services.
 - TSP is arranging translation services for a Medi-Cal service.
- Note: Translation services that occur during an IEP meeting may be assigned to Code 12 depending on the moment response.
 - TSP translating as third party = Code 12
 - TSP translating own work = Code 2Z

Code 12 Example

- Code 12

"I translated for a parent and the speech therapist during a meeting where they discussed Medi-Cal covered speech therapy services."

- Not Code 12

"I was translating report card comments for a parent." (Code 11)

Code 14 – Program Planning, Policy Development, and Interagency Coordination Related to Medi-Cal

- This code should be used when TSPs perform activities associated with the development of strategies to improve the coordination and delivery of Medi-Cal covered services to students and their families.
- This code can also be used when TSPs are performing collaborative activities with other agencies and/or practitioners.

Code 14 FAQ

- Will Code 14 mainly be used for a decision-making / administration position because of the nature of the activities?
 - Yes, the TSP should have program planning and/or policy development in their job description.
- Example of a clarifying question that can be asked to determine if a TSP has policy development in their job description.
 - "Can you confirm the job duties within your duty statement that are specific to program or policy development?"

Code 14 Example

- Code 14

“Met with the County Health Department to develop strategies for increasing the capacity of school Medi-Cal health programs.”

- Not Code 14

“Developing strategies to increase services offered to families and their children.” (Code 13)

- A clarifying question can be asked to determine what kind of services were being offered.

Code 15 – Medi-Cal Claims Administration, Coordination and Training

- The code should be used when:
 - An SMAA TSP is performing activities that are directly related to Medi-Cal claims administration, coordination, and or training for the SMAA program.
 - When an LEA has an SMAA TSP that participates in RMTS, they may have a moment coded to code 15 for Medi-Cal claims administration, coordination, and training since they are participating in RMTS and not eligible for direct charge.
- This includes the following:
 - Related paperwork, clerical activities, or staff travel necessary to perform these activities.
 - Initiating and responding to email and voicemail regarding Medi-Cal administration, coordination, and training.
 - [PPL 24-003](#) clarifies direct charge requirements for the SMAA program.

Code 15 Examples

- Code 15

“As the district’s MAA coordinator, I trained staff on state, federal, and local requirements for SMAA claiming.”

- Not Code 15

“I was completing payroll.” (Code 1)

Code 16 – General Administration / Paid Time Off

- The general administration activities must be administrative and clerical activities related to facilities, district functions, and operations.
- This includes related paperwork, clerical activities, or staff travel to perform these activities.

Code 16 – General Administration / Paid Time Off

- Activities that cannot be coded to Code 16:
 - Functions that are considered overhead:
 - Payroll
 - Maintaining inventories
 - Developing budgets
 - Executive functions
 - General administration related to students, instruction, and curriculum.
 - Any other activity that is not directly related to general administration of facilities, district functions, and operations.

Code 16 Examples

- Code 16

"I was completing an annual evaluation on a teacher."

"I was scheduling SLPs to ensure all students with SLP services were covered."

"I was filling out personal mileage reimbursement forms."

- Not Code 16

"I was completing purchase orders." (Code 1)

"I was checking emails." (Code 1)

- A clarifying question to determine the type of emails, which would determine code 16 or code 1.

Section 3: Non-Reimbursable SMAA Activity Codes

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Non-Reimbursable SMAA Activity Codes

- Code 1: School Related, Educational, and Other Activities
- Code 3: Non-Medi-Cal Outreach
- Code 5: Facilitating Application for Non-Medi-Cal Programs
- Code 7: Referral, Coordination, and Monitoring of Non-Medi-Cal Programs
- Code 9: Arranging Transportation for Non-Medi-Cal Services
- Code 11: Non-Medi-Cal Translation
- Code 17: Not Working/Not Paid
- Code 18: Invalid Moment/No Response

Code 1: School Related, Educational, and Other Activities

- This code should be used for school-related activities that are not health related, such as, social services, educational services, employment and job training.
- Example:
 - Providing classroom instruction and monitoring student academic achievement.
 - Preparing for or providing disciplinary behavior management principles to students.
 - Providing initial Individualized Education Plan (IEP) related (administrative) activities.

Note: This code is the code of last resort.

Code 3 - Non-Medi-Cal Outreach

- This code should be used when a TSP is performing activities that inform eligible or potentially eligible individuals about non-Medi-Cal programs.
- For Example:
 - Informing families about non-Medi-Cal wellness programs.
 - Conducting outreach campaigns to access social, educational, legal, or services not covered by Medi-Cal.

Code 5 – Facilitating an Application for Non-Medi-Cal Programs

- This code should be used when a TSP is informing an individual and/or family about programs such as CalWORKs, Food Stamps, WIC, childcare, legal aid, and other social or educational programs.
- Example:
 - Explaining the eligibility for a non-Medi-Cal Program or assisting the individual/family on completing that application.
 - Developing and verifying eligibility for the National School Lunch Program or helping with the college financial assistance application.

Code 7 – Referral, Coordination, & Monitoring for Non-Medi-Cal Services

- This code should be used when a TSP is making referrals for coordinating, and/or monitoring the delivery of non-Medi-Cal services, such as educational services.
- Examples:
 - Making referrals for, coordinating, or monitoring the delivery of scholastic and other non-health-related examinations.
 - Discussing a student's lack of academic progress and developing a plan to support the student.

Code 9 – Transportation for Non-Medi-Cal Services

- This code should be used when a TSP is assisting or accompanying an individual to obtain transportation to services that are not covered by Medi-Cal.
- Example:
 - Scheduling or arranging transportation for social, educational, or any other non-Medi-Cal services, programs, and activities.
 - Arranging transportation for field trips or school sporting events.

Code 11 – Non-Medi-Cal Translation

- This code should be used when a TSP is providing translation services for non-Medi-Cal activities.
- Examples:
 - Arranging translation services related to social, educational, and vocational services.
 - Arranging translation services to assist a parent to enroll a student in an after-school tutoring program.

Code 13 – Planning/ Development/ Interagency Coordination

- This code should be used when TSPs perform collaborative activities with other agencies to develop strategies to improve coordination and delivery of non-medical/non-mental health services.
- Examples:
 - Identifying gaps or duplication of other non-medical services for students and their families.
 - Meeting with the County Department of Social Services to discuss coordination of services.

Code 17 – Not Working/Not Paid

- This code should be used when a TSP responds to a moment and indicates they were not working at the time of the moment, or they were on an unpaid lunch break or other unpaid break/time off.
- Used for moments received by a position that is vacant.
 - Pre-certification
 - Post-certification
- Example:
 - My random moment happened during our lunch time. I was sitting at my desk eating my lunch.

Note: TSPs identified as 100 percent federally funded at the start of the quarter will have moments assigned to Code 17.

For TSPs identified as 100 percent federally funded at the end of the quarter or year, the moment will stand because they were eligible during the time of certification. *Additional steps will be necessary for a retroactive funding change*

Code 18 – Invalid Moment/No Response

- This code should be used when a TSP fails to provide a response to a moment within the required four student attendance days without verified leave status documents.
- **Example:**
 - A TSP is at work during their moment and decides not to answer the moment.

Note: For TSPs who were on leave but failed to notify their LEA coordinator prior to the moment expiration, Code 18 will be initially assigned to a non-response without a verified leave status documents. Once the TSPs leave status is verified by the LEA coordinator, the moment can be reassigned to a Code 16 or Code 17.

Section 4: Direct Service Activity Codes (LEA BOP)



Code 2 – Direct Medical Services

- Code 2 is split into two different sub-codes:
 - 2A (allowable) – Medically necessary direct medical services, including:
 - Assessments
 - Direct medical treatment services
 - Allowable Targeted Case Management (TCM) services
 - Extensions of a billable direct medical service
 - 2Z (unallowable) – Includes non-billable direct medical service, or an extension of a non-billable direct medical service.

Note: A moment from a TSP in Participant Pool 2 **cannot** be assigned a code 2A.

Pre-Question

Pre-question #2 is asked to TSPs in Participant Pool 1

- “Was this activity related to an assessment or screening, or related to a service that is authorized in an Individualized Education Plan (IEP), Individual Family Service Plan (IFSP), or other service/care plan? ”
 - Allowable answers to pre-sample question:
 - **Yes** = Code 2A or another code (Review moment response to confirm).
 - Note: Targeted Case Management (TCM) practitioners in Pool 1 cannot be assigned a code 8, 10, or 12.
 - **No** = Ask a Clarifying Question if needed. Review moment response and code accordingly.
 - **Not Sure** = Ask a Clarifying Question. Review moment response and code accordingly.

Code 2 – Direct Medical Services

- An extension of a direct medical service includes, but is not limited to:
 - Patient follow-up
 - Patient counseling
 - Patient assessment
 - Patient education
 - Parent consultations
 - Billing activities
 - All related paperwork, clerical activities, or staff travel required to perform these activities.
- Parent Consultations may also be Code 8 (referrals for, coordinating, and/or monitoring the delivery of Medi-Cal covered services), depending on moment response.

Code 2A Pre-Service Examples

Examples of allowable pre-service time:

- "I was reviewing the student's records, including cumulative files, health history, and medical records before an assessment."
- "I was observing a student in the classroom as part of my assessment."
- "I was preparing worksheets to use in an upcoming group therapy session."
 - The SMAA Manual Section 5-4 states that 2A codes "includes pre- and post-time directly related to providing direct care services when the student is not present, including... planning activities for the patient therapy session..." The Manual does not indicate timeline stipulations for when this prep time must occur.
- "I was traveling to my next student for their therapy session."
 - Travel can be to or from the treatment session.

Code 2A Post-Service Examples

Examples of allowable post-service time:

- "I was writing a report to summarize assessment results and recommendations for additional LEA services."
- "I was alone in office scoring/interpreting results after an assessment."
- "I was completing paperwork for billing activities related to direct services given to students under my service."
- "I was discussing a student's psychological assessment results with his parent."

Code 2A – Allowable Direct Medical Services

Examples of Code 2A Activities:

- Providing direct treatment services, such as speech, occupational, physical, and other therapies.
- Assessment of students, including mandated screening tests.
- Interviewing student and/or parent when conducting an assessment.
- Completing treatment session notes.
- Traveling to and from the treatment location.
- TCM related direct medical service activities.
- Specialized physical health care services such as catheterization, gastric tube feeding and suctioning.
- Mental health counseling, including substance abuse counseling and guidance.

Code 2A – Direct Medical Services Examples

- "I was writing a report for a speech assessment." – Code 2A.
- "I was assessing a student's hearing." – Code 2A.
 - General screenings are code 2A if done by a TSP from Pool 1.
 - Examples: vision, hearing, and other Early and Periodic Screening, Diagnostic and Treatment (EPSDT).
- "I was writing a student assessment report in preparation for an upcoming Individualized Education Program (IEP) meeting." – Code 2A.
- "I was completing progress notes for a student that had just finished a therapy session." – Code 2A.
- "I was referring a student to another medical practitioner to receive additional medical services per the student's care plan." – Code 2A.

Code 2Z – Unallowable Direct Medical Services

Examples of Code 2Z Activities:

- Direct care services that are not medically necessary (e.g., treatments not listed in an IEP meeting, IFSP meeting or IHSP).
- Administering first aid or emergency services
 - Code 2Z would be applicable for these moments regardless of Participant Pool.
- Participating in IEP/IFSP meetings.
- Supervising a direct medical service.
 - This could be a Code 16 for general administration/paid time off → Ask a Clarifying Question.
- Supervisory review of treatment logs or progress notes.
- Providing Applied Behavioral Analysis (ABA) services to a student.
- Monitoring students related to a short-term illness or recent injury.
- Any direct medical service response by a Pool 2 TSP.
- General cleaning up/organizing materials for the next day.

Code 2Z – Unallowable Direct Medical Services Examples

- “I was taking the temperature of a student with a headache.” – Code 2Z.
- “I was providing first aid to a student” – Code 2Z
- “I was inventorying medical supplies” – Code 2Z
- “I was reporting out a student’s psychological assessment results during a student’s IEP meeting.” – Code 2Z
- “I was editing an IEP” – Code 2Z

Code 2 - FAQ #1

Q: In a situation where a TSP responds to a moment by saying they were discussing a student's covered direct medical service with another TSP, does it matter if the TSP was the service practitioner or the consulting practitioner?

- A: For moments when two direct service practitioners are discussing services that one of them is providing to a student, it would be coded as follows:
 - If the TSP responding is the one providing the services, it would be Code 2A as an extension of a direct medical service.
 - If the TSP is talking to the direct service practitioner and discussing services that the practitioner is providing, it would be Code 8 for coordination of services.

Code 2 – FAQ #2

Q: Will it always be a Code 2Z when a TSP in Participant Pool 1 is attending an IEP meeting even if they are reporting out their own assessment results?

- A: Yes. According to the SMAA Manual (Section 5, page 5), any moment response in which a Pool 1 TSP is attending an IEP meeting, regardless of why they are in the meeting, must always be coded to Code 2Z.

Code 2 – FAQ #3

Q: A Pool 1 TSP answered "No" to the moment being related to a care plan, but the moment response identified that the action was related to an IEP. Would the moment be coded 2A and override the initial "No" response?

- A: A CQ must be asked to override a "No" response. The Moment is likely a 2A, but a CQ must be asked to verify if the service is in relation to an IEP, IFSP or other care plan.

2A – FAQ #4

Q: Can a Licensed Nurse coordinating administration of doctor prescribed medication for a medical condition (for example: prescribed Inhaler for asthma or Vyvanse for ADHD) – be considered a 2A – even if the TSP is unsure, or says "no" to the pre-question in relation to an assessment, IEP/IFSP? The medication administration is included in a doctor's order tied to the student's IEP, but the order is not in his actual IEP.

- A: A CQ must be asked.
- The moment is likely a 2A as the [Local Educational Agency \(LEA\) Service: Nursing \(loc ed serv nurs\)](#) Page 1 confirms that “administration of medications and therapeutic agents necessary to implement a treatment, disease prevention or rehabilitative regimen ordered by and within the scope of licensure of a physician, dentist, podiatrist, or clinical psychologist” is a covered LEA BOP service. However, a CQ should be asked to verify if the service was in relation to an IEP, IFSP or other care plan.

Training Related – FAQ #5

Q: What differentiates the trainings being coded to Codes 1, 2Z, or 16?

- Code 1 is typically used for trainings that are school, curriculum, or education related.
- Code 2Z is for Participant Pool 1 TSPs being trained on how to conduct a direct service.
- Code 16 is used for trainings that are more general in nature, including district wide trainings.

Reference Material

When reviewing Participant Pool 1 moment responses, please use the below resources:

- [SMAA Manual Section 5](#)
- [LEA BOP Provider Manual](#)
- [Policy and Procedure Letters](#)

Section 5: Interrelated, Parallel, and Non-Parallel Activity Codes



SMAA Activity Codes

- SMAA has 18 activity codes to capture 100% of the time for reimbursable and non-reimbursable activities.

Categories

Parallel

- Corresponding codes for different activities.
- (e.g.) Medi-Cal vs Non-Medi-Cal related activities

Non-Parallel

Interrelated

Categories

Parallel

Non-Parallel

Interrelated

- Exist independently and do not have their own counterparts.

Categories

Parallel

Non-Parallel

Interrelated

- Interrelated codes can be similar and have overlap between both educational and Medi-Cal covered activities.

Parallel Codes

- Codes 3-14 are considered parallel codes because they each have their own counterparts.
- For LEA BOP the parallel codes are 2A and 2Z

Outreach

Non-Medi-Cal

Code 3: Non-Medi-Cal Outreach

Medi-Cal

Code 4: Medi-Cal Outreach

Applications

Non-Medi-Cal

Code 5: Facilitating Application
for Non-Medi-Cal Programs

Medi-Cal

Code 6: Facilitating the Medi-
Cal Application

Referral, Coordination, and Monitoring

Non-Medi-Cal

Code 7: Referral, Coordination, and Monitoring of Non-Medi-Cal Services

Medi-Cal

Code 8: Referral, Coordination, and Monitoring of Medi-Cal Services

Transportation

Non-Medi-Cal

Code 9: Arranging Transportation for Non-Medi-Cal Services

Medi-Cal

Code 10: Arranging Transportation in Support of Medi-Cal Services

Translation

Non-Medi-Cal

Code 11: Non-Medi-Cal Translation

Medi-Cal

Code 12: Translation Related to
Medi-Cal Services

Program Planning and Policy Development

Non-Medi-Cal

Code 13: Program Planning, Policy Development, and Interagency Coordination Related to Non-Medi-Cal Services

Medi-Cal

Code 14: Program Planning, Policy Development, and Interagency Coordination Related to Medi-Cal Services

Non-Parallel Activity Codes

- **Code 1:** School Related, Educational, and Other Activities
- **Code 15:** Medi-Cal Claims Administration, Coordination, and Training
- **Code 16:** General Administration/Paid Time Off
- **Code 17:** Not Working/Not Paid
- **Code 18:** Invalid Moment/No Response

Interrelated Activity Codes

- **Code 1:** School Related, Educational, and Other Activities &
- **Code 16:** General Administration/Paid Time Off

- **Code 2:** Direct Medical Services &
- **Code 8:** Referral, Coordination, and Monitoring of Medi-Cal Services

Code 1

- School related activities **that are not health related.**
- Activities specific to **education/curriculum** such as:
 - Teaching services
 - Social Services
 - Training Services
- Includes activities that are primary job duties **outside of those relating to Medi-Cal.**
- "Last Resort" Code
 - If an activity does not clearly fit into another code, it should be coded to code 1.

Code 16

- Facilities, District Functions, and Operations

- General administration duties that are **specific to** administrative/clerical activities related to facilities, district functions and operations.

- Paid Time Off

- Individual who is being paid but is not at work.
- Includes lunch, breaks, leave, vacation or other paid time not at work.

- Training

- Must be general in nature and unrelated to school curriculum, instruction or students.
 - Example: School-wide training, professional development, staff meeting.

Code 1 vs Code 16

- **Education Requirements (All Code 1)**

- Conducting Attendance
- Activities related to immunization requirements for school
- Enrolling new students/obtaining registration information
- Reviewing reports on textbooks or attendance
- Reviewing education records for students who are new to the school

- **Instruction (All Code 1)**

- Providing classroom instruction (including lesson planning)
- Testing, correcting papers, completing report cards
- Monitoring student academic achievement

Code 1 vs Code 16

- IEP (All Code 1)

- Developing, coordinating and processing components of an IEP for a student
- Annual Reviews
- Parental signoffs
- IEP meetings

- Operations (Codes 1 & 16)

- Performing admin or clerical activities related to budgeting, accounting, and payroll within a school or district function. **(Code 1)**
- Compiling, preparing, and reviewing reports related to instruction, curriculum, or student operations. **(Code 1)**
- Administrative oversight responsibilities as a principal, superintendent or assistant principal **(Code 16)**
- Compiling, preparing, and reviewing reports related to general operations. Unrelated to instruction or curriculum. **(Code 16)**

Code 1 vs Code 16

- Meetings and Trainings (Codes 1 & 16)

- Coordinating/conducting a training related to curriculum or instruction **(Code 1)**
- Attending a school staff meeting related to curriculum, instruction and/or discipline and behavior **(Code 1)**
- Trainings that clarify site and district policy, procedures, or issues related to employees **(Code 16)**
- Professional Development Trainings **(Code 16)**

- Review and Planning (Codes 1 & 16)

- Reviewing articles related to curriculum and instructional services **(Code 1)**
- Evaluating curriculum, student/teacher policies and procedures as it relates to curriculum **(Code 1)**
- Reviewing technical literature and research articles **(Code 16)**

Note: If a TSP in Participant Pool 1 is training a direct service practitioner on how to conduct a direct service, **this activity must be coded to a 2Z.** (SMAA Manual Section 5-6, 2Z(d))

Code 1 vs Code 16

- Supervision (Codes 1 & 16)
 - Providing supervision of students (example: playground or lunchroom) **(Code 1)**
 - Handling behavioral issues with students **(Code 1)**
 - Supervision of staff, student teachers, or classroom volunteers **(Code 16)**
 - Evaluation of employee performance **(Code 16)**
- Survey Participant Paperwork (Codes 1 & 16)
 - Paperwork related to initial IEP development **(Code 1)**
 - Completing student academic progress reports **(Code 1)**
 - Completing expense claims as required for work-related travel **(Code 16)**

Code 8

- Referrals for coordinating and/or monitoring delivery of Medi-Cal covered services
- Includes:
 - Related paperwork
 - Clerical activities
 - Staff travel necessary to perform activities
- Gathering any information in advance that may be required for medical/dental/mental health referrals.
 - Can be obtained from an existing IEP.

Code 8

- Attending IEP meetings is part of an education mandate and must not be assigned a Code 8
- Initial assessments leading to IEP meetings must not be assigned a Code 8
- Once IEP is established, Code 8 can be assigned to referrals, coordination, and monitoring of Medi-Cal covered services
- Referral, coordination and monitoring of services provided outside of an IEP/IFSP may be assigned as Code 8

Code 2 vs 8

- TSPs Participant Pool designation should be considered when coding for Code 2 vs Code 8
- Moments for TSPs in Participant Pool 2 should never be assigned to Code 2A; however, Code 2Z may be relevant for these TSPs:
 - **For example**, a Participant Pool 2 TSP may submit a moment related to the provision of speech therapy services.
- When two direct service practitioners are discussing a student's progress, it is important to examine which TSP is performing the direct medical service.

Section 6: Clarifying Questions

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Definition

- Clarifying Questions (CQs)
 - Open-ended question is used to gain additional information to assign the correct activity code.

NOTE: When a CQ requests clarification from the TSP about specific language in their response, it is not considered leading.

Example: TSP response "I was entering progress reports into the billing system."

CQ: "Can you specify and provide further details on what you were entering into the billing system during the 1-minute moment?"

Clarifying Questions (CQs)

- Are relayed through the System Software Platforms.
- Must be open-ended and cannot be leading.
- Used to gain clarity on moment responses.
- No more than two (2) can be asked for a given moment response.
- Both CQs must be issued within 15 calendar days from the moment response. [Section 6-19 of the 2019 SMAA Manual](#) states the following:
 - "Clarifying Questions (CQs) by the senior coder must be issued to the TSP within 15 calendar days from the date the TSP completed their moment response."
- A 10 percent sample is reviewed quarterly.

Example of Open-ended Questions

- In detail, what were you discussing during the one-minute survey?
- Can you describe the topic being discussed during the time of the one-minute survey?
- Without violating privacy, can you provide detail of what was being discussed during the one-minute survey?
- Please indicate the type of IEP meeting this activity was related to and explain what is being discussed.

Example of Leading Questions

- Did the outreach activity you performed during your moment involve passing out Medi-Cal flyers?
- Were the topics that were discussed during the meeting you attended pertain to Medi-Cal?

Examples of Good Questions for Pool 1

2A Moments with a pre-question response “Yes”

- Please elaborate on the specific goals being addressed at the morning meeting.
- Can you please clarify how the redirecting activity is related to a service in a care plan as indicated in question #1?
- Can you please explain what type of assessment had been conducted in order to complete the report you were writing during your moment as part of the IEP assessment process?
- Can you please explain why the 1:1 student required your assistance when walking outside, what goal was your assistance supporting during your 1-minute survey in their IEP, IFSP, or other care plan as indicated in question #1?

Example of Good Questions for Pool 1

2A Moments with a pre-question response “No/Not Sure”

- Please specify if a formal authorization is on file to administer medication and what the student need is.
- Please provide more detail about why the kid needed supervision and is this service part of an IEP, IFSP, Vision or Hearing Screening, Medication Order, Healthcare Provider Authorization Form, Protocol or Doctor's order?
- Please specify which component of the IEP you were writing during the time of your moment?
- Was the therapy session you were prepping for related to a service that is indicated in an IEP, IFSP, or other care plan?

Examples of Good Questions for Pool 1

2A Moments with a pre-question response “No/Not Sure”

- Can you please clarify who, by job title, had conducted the 8th grade mandated screenings that you were reviewing and what is your role in screening the absent students and performing the rescreens for the fails?
- Can you please clarify your response to question #1, was the counseling session you were preparing for during your 1-minute moment related to a service that is authorized in an IEP or other care plan?
- Can you please clarify how the redirecting activity is related to a service in a care plan as indicated in question #1?
- Can you please clarify what type of meeting you were participating in when reporting results on cognitive/processing assessments?

Section 7a: Moment Responses and Code Assignments (SMAA)



Moment Response #1

DIRECTOR Pool 2

Who: Parents.

What: Having a meeting with the parents.

Why: De-escalation of a conflict.

CQ 1: What was the nature of the conflict?

A: Fight at school happened and parent could not make it for a reintegration meeting. Discussed the incident and plan and expectations for progress for student moving forward.

Answer #1

Code

1

Reason: Applying discipline activities. Conferring with students or parents on discipline, academic matters or other school-related issues.

Moment Response #2

SCHOOL PSYCHOLOGIST Pool 1

Who: Myself.

What: Reviewing a student's cumulative records.

Why: Preparing for a student support team meeting and referral for IEP assessment.

Answer #2

Code

8

Reason: Gathering information that may be required for a referral. A clarifying question would have been helpful to determine what was discussed in regards to the cumulative records.

Moment Response #3

SCHOOL NURSE Pool 1

Who: School Administrator.

What: Fire Drill.

Why: This is a mandatory activity done by all staff.

Answer #3

Code

16

Reason: It is an administrative activity related to general building or district function or operation.

Moment Response #4

ADMINISTRATIVE CLERK Pool 2

Who: Office Secretary.

What: Coordinating a school assessment meeting with the psychologist.

Why: Had a parent request for an assessment for her child that attends a private school.

Answer #4

Code

8

Reason: Arranging for any Medi-Cal covered medical/mental health diagnostic or treatment service that may be required because of a specifically identified medical/mental health condition.

Moment Response #5

COMMUNITY RELATIONS SPECIALIST Pool 2

Who: Community Health Worker.

What: Hosting a meeting on Zoom with a parent.

Why: Performing this activity as a goal to establish healthful habits on mental health through parent skill-building and actionable mental and physical activity education.

Answer #5

Code

4

Reason: TSP is meeting with a parent to discuss healthy habits related to mental health.

Moment Response #6

PRINCIPAL Pool 2

Who: Special Education Staff.

What: Participating in a district special education advisory committee discussing behavior supports for students with special needs.

Why: This is a monthly meeting.

Answer #6 Code

14

Reason: TSP explicitly states that they are meeting with a special education group to discuss student support for special needs students.

Moment Response #7

MANAGER Pool 2

Who: English Learning Services.

What: Walking through different school sites.

Why: Calibration and collaboration among different departments, sharing what should be evident in a Pre-K and Kindergarten classroom.

Answer #7

Code

13

Reason: TSP performs collaborative activities with other agencies associated with the development of strategies to improve the coordination and delivery of non-medical/non-mental health services to students and their families.

Moment Response #8

SP ED CLERICAL/TRANSLATOR Pool 2

Who: IEP team both from district and county.

What: In an IEP Meeting.

Why: I am the interpreter for the district.

CQ1: Please indicate the type of information you were interpreting as part of the IEP you were participating in.

A: It was a meeting for a student who is transferring.

Answer #8 Code

11

Reason: Moment does not indicate any translation related to any Medi-Cal services.

Moment Response #9

RESOURCE TEACHER Pool 2

Who: School Psychologist.

What: Discussing mental health concerns for a student.

Why: Concerned about the student's well-being and they may have taken something. They recently lost a parent.

CQ1: Please explain how the mental health concerns about the student were addressed based on the discussion with the psychologist.

A: Psychologist is planning on pulling the student to check in with them.

Answer #9 Code

8

Reason: The resource teacher is coordinating a mental health check-in with a direct service provider.

Moment Response #10

SCHOOL COUNSELOR Pool 2

Who: Colleagues.

What: Mental Health Training.

Why: It was a mandatory training.

CQ1: Can you provide additional information about the mental health training you attended, what was discussed and how will the information be utilized in a school setting?

A: This information provided tools and approaches that I can implement when a student is experiencing a mental health challenge that has not reached crisis level. I work with students who experience many different types of mental health issues. Learning anything that will help my students with what they are experiencing is another tool in my toolbox.

Answer #10

Code

16

Reason: The counselor is taking part in a mandatory training with other colleagues on how they can perform the direct service to their students. See Part H of Code 16 in the SMAA Manual.

Moment Response #11

CLERK II Pool 2

Who: Myself.

What: Gathering and organizing data related to Medi-Cal applications.

Why: I follow up and keep records about all clients I assist with Medi-Cal applications with regards to their eligibility process.

Answer #11

Code

6

Reason: Gathering information related to the application and eligibility determination for an individual.

Moment Response #12

SCHOOL PSYCHOLOGIST Pool 2

Who: School psychologists from other districts for a training.

What: Learning about utilizing the pattern of strengths and weaknesses model for Specific Learning Disability Identification.

Why: So I can better lead the psychologists in my district in Specific Learning Disabilities Identification.

Answer #12

Code

1

Reason: Participating in or coordinating a training that enhances IDEA child find activities (SMAA manual 1(h)). [IDEA Part B Regulations](#) provide guidance for identifying children with specific learning disabilities (SLD), so SLD identification falls directly under IDEA.

Moment Response #13

MENTAL HEALTH SERVICES CASE MANAGER

Pool 2

Who: Myself.

What: Speaking with a parent regarding a student's mental health treatment and educational goals.

Why: Part of mental health case management activities.

CQ 1: Who provides the mental health treatment being discussed?

A: A practitioner at a residential facility that the student is placed at through the IEP.

Answer #13

Code

8

Reason: Arranging for any Medi-Cal covered medical/mental health diagnostic or treatment services that may be required.

Moment Response #14

PRINCIPAL Pool 2

Who: Custodian.

What: Looking at facilities needs, classrooms and the school.

Why: Organizing and maintenance for spaces to better support learning.

Answer #14

Code

16

Reason: Performing administrative and/or supervisory activities related to general building or district functions or operations.

Moment Response #15

NURSE Pool 2

Who: Student's Case Manager.

What: Discussing student's self administration of eye drops in his class.

Why: Parents agreed in IEP meeting that student can self-administer daily eye drops in class, so he doesn't have to miss time walking to the health office.

CQ 1: Clarify if the student's daily self-administration of lubricating eye drops in class was included in the IEP and who were you discussing that with?

A: The self administration was in the team action of the student's IEP and has an order from the physician to administer the eye drops in school. The student is diagnosed with congenital Goldenhar syndrome.

Answer #15

Code

8

Reason: The IEP services were established prior to the coordination of allowing the student to self-administer the eye drops.

Section 7b: Moment Response and Code Assignments (LEA BOP)

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Code 2A and 2Z

- » In LEA BOP, direct medical services moments have two possible subcodes:
- **Code 2A** - Includes medically necessary direct medical services or an extension of direct medical services that are allowable covered services under the LEA BOP.
 - **Code 2Z** - This code includes non-covered direct medical services, or an extension of non-covered direct medical service.

LEA Ops – DHCS Reviews

- Review Process:
 - Examine responses to pre-sample and sample questions in moments coded as 2A and 2Z.
 - Determine whether the moment is related to an IEP, IFSP, or other Care Plan (if required for that particular service).
 - Confirm whether the moment was performed by an appropriate service practitioner.
 - Ensure that no Protected Health Information (PHI) has been added to moment responses.
 - Check if the moment is related to a billable direct service.
 - Inform LEC of outcome: Agree / Disagree / Need more info

LEA BOP Reference Materials

- What we use:
 - [SMAA Manual - Section 5](#)
 - [LEA BOP Provider Manual](#)
 - [LEA BOP Policy & Procedure Letters \(PPLs\)](#)

Moment Examples



Moment Response #1

LICENSED SPEECH LANGUAGE PATHOLOGIST

Pool 1

Pre-Sample (PS) Q2:

Yes.

Who:

By myself.

What:

I was writing a report for an upcoming IEP meeting.

CQ 1:

What report were you writing?

A:

I was writing an assessment report.

Answer #1

Code

2A

Reason: Code 2A includes evaluating the student and developing a report that will be presented at an upcoming IEP meeting.

Moment Response #2

LICENSED VOCATIONAL NURSE Pool 1

PS Q2: No.

Who: Myself.

What: Driving.

Why: To get to my next student.

CQ 1: What services would you provide student upon arrival and is it an IEP directive service?

A: Yes, I was driving to see a student with an IEP. I am a diabetic nurse and my students that day was at different school sites.

Answer #2

Code

2A

Reason: Travel to or from a direct service is an example of indirect service time. Since the student has an IEP, this moment is considered a 2A.

Note: At this point in time, this is a billable activity for LEA BOP, but once we implement the new CMS guidance, it will no longer be available.

Moment Response #3

LICENSED SPEECH LANGUAGE PATHOLOGIST Pool 1

PS Q2:

Yes.

Who:

I was by myself.

What:

I was entering progress reports into SEIS.

Why:

This activity is related to my student's IEPs.

CQ1:

Please specify and provide further details on the aspect of the IEP you were entering into SEIS during the 1-minute moment.

A:

Progress notes.

CQ2:

Please specify the aspect of the IEP progress notes worked on during the 1-minute moment addressed.

A:

I was entering student progress notes into the SEIS system for the students on my caseload.

Review Moment Response and CQ #3

- **Difference Between Progress Reports and Progress Notes:**
 - **Progress Reports*:** Required by IDEA, not a billable activity.
 - **Progress Notes:** Part of a student's IEP speech session, considered an extension of the service, and thus billable.
- **Suggested CQ:**
 - Were you entering a student progress report that is required by IDEA or progress notes for a student's IEP speech session?

*NOTE: Activities that are an integral part of or an extension of a medical service (e.g., student follow-up, student assessment, student counseling, student education, consultation, and student billing activities) are considered direct medical services and are considered Code 2. (SMAA Manual 5-4)

Answer #3 Code

2A

Reason: Paperwork associated with the delivery of direct care services, including the preparation of progress notes, or completion of billing activities, is a Code 2A.

Moment Response #4

LICENSED/CREDENTIALLED SPEECH-LANGUAGE PATHOLOGIST

Pool 1

PS Q2: Yes.

Who: Student and parent.

What: Consulting with the parent, providing strategies to support language development at home.

Why: As part of the student's IEP to facilitate language development.

Answer #4 Code

2A

Reason: This is an example of allowable pre- and post-service.

Moment Response #5

TRAINED HEALTH CARE AIDE Pool 1

PS Q2: No.

Who: I was with staff and students.

What: I was helping students with educational chores.

Why: These chores are on their IEPs to help with life skills.

Answer #5 Code

2Z

Reason: PS Q2 was responded to as “NO” and no CQ asked.

NOTE : This may have qualified as a 2A moment if confirmed through a CQ response that the THCA was assisting in IEP-directed Activities of Daily Living (ADL), which are allowable. However, “educational chores” does not qualify for a 2A.

Possible CQ #5

CQ example 1: Can you provide more details about how these chores are included in their IEPs and how they relate to life skills development?

Moment Response #6

LICENSED SPEECH LANGUAGE PATHOLOGIST

Pool 1

PS Q2: Yes.

Who: By myself.

What: I was editing/finalizing an IEP.

Why: In preparation for an upcoming IEP meeting.

Answer #6

Code

2Z

Reason: Editing/finalizing an IEP are pre- and post-activities of an IEP meeting. CMS has clarified that the IEP document is a requirement of the Department of Education, not Medicaid, and interfacing with the IEP in a group setting is not part of a covered service and not a 2A.

Moment Response #7

SCHOOL NURSE Pool 1

PS Q2: Yes.

Who: Working alone.

What: I was reviewing student lists for initial and three-year IEPs.

Why: This activity helps me plan and know who are the students that I have to assess.

Answer #7

Code

2Z

Reason: This moment was more of a general planning activity than tied to assessing a specific student and would, therefore, be a Code 2Z. Similar to the prior example, this activity is related to updating the IEP as required by the Department of Education.

Moment Response #8

LICENSED MARRIAGE AND FAMILY THERAPIST

TCM Pool 1

PS Q2: Yes

Who: By myself.

What: Writing a report to summarize assessment results and recommendations for additional LEA services.

Why: As a part of TCM services.

Answer #8

Code

2A

Reason: Covered services in relation to an IEP, IFSP, or other care plan and provided by a TCM practitioner.

NOTE : TCM practitioners billing under the LEA BOP must have a TCM Certification Statement.

Moment Response #9

CREDENTIALLED SCHOOL COUNSELOR Pool 1

PS Q2: Yes.

Who: Parent, general education teacher, school psychologist, school nurse, teacher, and speech practitioner.

What: Initial IEP.

Why: Acting as administrative designee.

Answer #9

Code

2Z

Reason: No direct services were provided as this was an administrative service as it took place during an IEP meeting.

Moment Response #10

CREDENTIALLED SCHOOL COUNSELOR Pool 1

PS Q2: Yes.

Who: Myself.

What: Writing a Psychoeducational Assessment Report for an upcoming IEP.

Why: To prepare for an upcoming IEP.

Answer #10

Code

2A

Reason: The practitioner has completed an assessment, which is an allowable service. Writing the report for a direct service is an extension of the service and is allowable under LEA BOP.

Moment Response #11

CREDENTIALLED SCHOOL COUNSELOR Pool 1

PS Q2: Yes.

Who: A student.

What: Assessing a student

Why: Student was referred for an initial evaluation; was assessing them to start the evaluation.

Answer #11

Code

2A

Reason: Assessments are covered under the LEA BOP, [SMAA Manual Page 5-4](#), and the LEA BOP Provider Manual: [loc ed serv psych](#)

Hard to Code Moments



Moment Response #12

LICENSED SPEECH-LANGUAGE PATHOLOGIST

Pool 1

PS Q2:

Yes.

Who:

No one.

What:

Making phone calls to parents and sending follow up e-mails regarding upcoming initial IEPs.

Why:

This is part of my preparation for initial IEP meetings with families.

CQ 1:

Would you provide details of the discussion that took place during the phone call, or the content of the email sent during your moment?

A:

Reviewing initial speech and language report with parent via phone call.
Providing opportunity to provide further clarification and answer questions relative to speech and language assessment results and getting input on potential goal(s) for student.

Answer #12

Code

2A

Reason: Code 2A includes evaluating the student and developing a report that will be presented at an upcoming IEP meeting.

Moment Response #13

LICENSED SPEECH LANGUAGE PATHOLOGIST

Pool 1

PS Q2: No.

Who: No one.

What: Lesson planning.

Why: To prepare for therapy sessions.

CQ 1: Since you answered no to the first question we must ask, was this therapy session authorized by an IEP, IFSP, Care Plan or Service Plan?

A: Okay, I guess it was related to an IEP as student was absent and I was planning what to work on when she returned.

Answer #13

Code

2A

Reason: Planning for an upcoming therapy session is a covered pre-activity code.

Moment Response #14

SCHOOL NURSE Pool 1

PS Q2:

Not sure.

Who:

In the health office.

What:

Calling a teacher to ask them to send a student to the health office.

Why:

I needed a student to come to the health office to take medication.

CQ1:

What type of medication prompted the call to the teacher to send the student to the health office, what medical/health need was it supporting and was the medication administration included in an IEP or other care plan as outlined in PS Q2?

A:

The. I do not believe it is an actual part of the student's IEP, but the IEP is for Other Health Impairment (OHI): ADHD

CQ 2:

Can you please find out whether the student's ADHD medication administration is included in a doctor's order tied to the student's IEP for OHI: ADHD?

A:

The ADHD medication does have a doctor's order and additionally a part of his IEP.

Answer #14

Code

2A

Reason: “Administration of medications and therapeutic agents necessary to implement a treatment, disease prevention or rehabilitative regimen ordered by and within the scope of licensure of a physician, dentist, podiatrist, or clinical psychologist” is a covered LEA BOP service.

Moment Response #15

SCHOOL NURSE Pool 1

PS Q2: No.

Who: Knights Ferry staff.

What: Vision screening for second graders.

Why: Mandatory screening.

Answer #15

Code

2Z

Reason: A CQ should have been asked. Was the TSP conducting a screening, in training about vision screening, or taking a break during the vision screening? This moment's response does not allow for accurate coding.

Note: Without a CQ or if a CQ is asked and there is no response, this would be a 2Z and it would be a Code 1 if it was related to supervisory activities.

Possible CQ #15

CQ 1: Would you clarify whether you were actively conducting a screening at the time of the moment?

Moment Response #16

Trained Health Care Aide Pool 1

PS Q2: Yes.

Who: I was with a student.

What: I was supervising the student complete a fine motor vocational activity.

Why: The activity pertains to their IEP goals.

Answer #16

Code

2Z

Reason: This is a LEA BOP service covered service but not provided by Qualified LEA Rendering Practitioners under Provider Manual section Local Educational Agency (LEA) Rendering Practitioner Qualifications (or “loc ed rend” in the locator key). Please note that THCA’s scope of covered services are limited to ADL assistance and specialized physical healthcare services.

Examples of Well Written Clarifying Questions



Moment Response #17

CREDENTIALLED SCHOOL PSYCHOLOGIST Pool 1

PS Q2: Yes.

Who: Special education teacher, 2 instructional assistants, and 7 special education pre-school students.

What: I was conducting an observation of a student in a pre-school special education class.

Why: I was performing this activity as part of the transition planning to kindergarten next school year.

CQ 1: Please elaborate further on the reason in which you were observing the student during the 1-minute moment.

A: The reason for the comprehensive assessment for this student is a mandated Transition-to-Kinder assessment as the student is currently in a pre-school special day class and will be in kindergarten next year.

Answer #17

Code

2A

Reason: Observing a student in the classroom to gather information for the student's assessment is a Code 2A.

Moment Response #18

TRAINED HEALTH CARE AIDE Pool 1

PS Q2: Yes.

Who: Students.

What: Administering medicine.

Why: Student needs.

CQ 1: Please specify if a formal authorization is on file to administer medication and what the student's need is.

A: Yes- formal medication authorization on file for medication administration. Student need is Asthma.

Answer # 18

Code

2A

Reason: Time spent administering/monitoring medication is a billable service.

Possible CQ #18

CQ 2: Was this activity related to an assessment or screening, or related to a service that is authorized in an Individualized Education Plan (IEP), Individual Family Service Plan (IFSP), or other service/care plan?

Moment Response #19

SPEECH AND LANGUAGE PATHOLOGIST Pool 1

PS Q2: Yes.

Who: A student and the student's behaviorist.

What: I was evaluating the student. I asked a question from the manual.

Why: I was preparing for an upcoming triennial evaluation individualized educational plan.

CQ 1: Please provide more details about what you were specifically evaluating the student at the 1-minute moment.

A: I was evaluating his expressive vocabulary skills.

Answer #19

Code

2A

Reason: Code 2A includes evaluating the student and developing an assessment that will be presented at an upcoming IEP meeting.

Moment Response #20

SCHOOL NURSE Pool 1

PS Q2:

No.

Who:

Co-worker.

What:

Checking incoming emails regarding new medication orders for a student that is not on an IEP.

Why:

New medication orders need to be reviewed by the nurse.

CQ 1:

For the new medication orders that you were reviewing at the time of your moment (8:18 AM), can you please clarify what type of medical/health need it was addressing and if it will be included on a care plan?

A:

It was for an Epi Pen due to an allergy to fish. No separate care plan will be done.

Answer #20

Code

8

Reason: The student does not have a care plan (and one will not be developed, as noted in the moment response). Therefore, it would not qualify as a 2A. However, the nurse is monitoring incoming e-mails regarding new medication orders for a student, which qualifies it for a code 8.

Note: This potentially could have been a 2A moment. However, the TSP clarified that there is not, nor will there be, a care plan. This was clarified multiple times. Therefore, it does not qualify as 2A.

Moment Response #21

TRAINED HEALTH CARE AIDE Pool 1

PS Q2:

No.

Who:

Other students on lunch and staff on lunch duty.

What:

I was supervising a student at lunchtime.

Why:

I was instructed by my administration.

CQ 1:

Can you please provide the purpose for supervising the student at lunchtime and why this support was necessary?

A:

This support is necessary since it is in the nurse's assessment but not in her accommodations or services section of the IEP.

CQ 2:

Can you please clarify how the support you were providing was in the nurse's assessment, what type of assessment was that related to and to address what area of need?

A:

A recommendation by the nurse in the health/status summary on the present levels page. Access to one-on-one paraprofessional for the student is recommended due to high fall risk related to left sided weakness/possible periods of vision loss.

Answer #21

Code

2Z

Reason: The services provided are not part of the accommodations or services section of the IEP. In order for this to be a code 2A, the accommodation would need to be part of the IEP.

RMTS Coding Appeals

- Each LEC produces a Quarterly Coding Report (QCR) within 30 calendar days of coding being finalized for the quarter.
- Each claiming unit has 30 calendar days to review the QCR data to ensure accuracy and submit corrections to the LEC.
- For any specific coding assignment for which the claiming unit and LEC are unable to reach an agreement, the coding appeals process can be utilized (*process contained in [SMAA Manual section 6-24](#)*).
- Request for coding appeals is submitted to DHCS within the 30 calendar days of QCR review.
- DHCS issues a written decision to all parties involved within 60 business days after the request for appeal has been received.

Next Steps



Next Steps

- A PDF copy of this presentation will be provided for all attendees.
- For any further questions or concerns please e-mail the RMTS mailbox (RMTS@dhcs.ca.gov).