



# Random Moment Time Survey (RMTS)

## Coder Training 2022

Department of Health Care Services

# Purpose of this Training

- Provide guidance to assist in correctly coding all activities.
- Provide examples of submitting Clarifying Questions (CQ).
- Provide examples for coding Time Survey Participant (TSP) responses.
- Provide an update on the Local Educational Agency (LEA) Medical Billing Option Program (BOP).
- Annual training is provided for regional/county senior coding staff who will then train their primary coding staff. ([SMAA Manual 6-17](#))

# Training Overview

- Section 1: Participant Pools & Activity Codes (Lydia)
- Section 2: Reimbursable SMAA Activity Codes (Levi)
- Section 3: Non-Reimbursable SMAA Activity Codes (Rida)
- Section 4: Direct Service Activity Codes (Rehana)
- Section 5: Interrelated, Parallel, and Non-Parallel Activity Codes (Terry)
- Section 6: Clarifying Questions (Ezralene)
- Section 7: Moment Response and Code Assignments (Muhammad/LEA Ops)
- Section 8: Next Steps (Phoebe)

# Section 1: Participant Pools and Activity Codes

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# Guiding Principle

42 CFR 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

### 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 who is also a registered school audiometrists

### 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

### Targeted Case Management (TCM)

- » Program specialist

### 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 Providers

### Direct service practitioners:

- » Direct service practitioners (Cost Pool 1) that are unqualified to bill under LEA BOP (i.e. an SLPA without supervision)
- » Direct service practitioners (Cost Pool 1) that are not providing direct billable health services

### Liaisons:

- » Parent Community Facilitator/Liaison
- » Community Liaison

### 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

# Participant Pool 2 List

## Administrative Service Providers

### **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
- » Pupil Support Services Administrators
- » Principal and/or Assistant Principal
- » Principal at Special Education Schools
- » Student Support Services Coordinator/Case Manger

- » Coordinator – various selected positions (Medical, Mental Health, Speech, Nursing, etc.)

### **Instructors:**

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

# Participant Pool 2 List

## Administrative Service Providers

### **Clerical and Secretarial Staff:**

- » Office Clerical Staff (i.e. technician, secretary, office manager, clerk, assistant, etc.)
- » Secretary, Sr. 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; Sr. Translator
- » Interpreters & Interpreter Assistants

### **Other:**

- » Transportations Planner/Router
- » Organization Facilitator
- » Placement Assistant
- » Professional Expert
- » Pupil Support – Technicians
- » Other groups/individuals that may be approved by DHCS.

# Activity Codes

**Code 1** – School-Related, Educational, and Other Activities

**Code 2A** – Direct Medical Services – Billable

**Code 2Z** – Direct Medical Services - Non-billable

**Code 3** – Non-Medi-Cal Outreach

**Code 4** – Medi-Cal Outreach

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

**Code 6** – Facilitating Medi-Cal Application

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

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

**Code 9** – Arranging Transportation for Non-Medi-Cal Services

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

# Activity Codes

- » **Code 11** – Non-Medi-Cal Translation
- » **Code 12** – Translation Related to Medi-Cal Services
- » **Code 13** – Program Planning, Policy Development, and Interagency Coordination Related to Non-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 17** – Not Working/Not Paid
- » **Code 18** – Invalid Moment/No Response

# RMTS Moment Notification

- » RMTS moments require a one student attendance day notification and a four student attendance day response timeline.
- » Clarifying questions can be asked within 15 student calendar days of the moment.
- » TSPs will still have 5 student attendance days to respond to any clarifying questions.

# **Section 2: Reimbursable SMAA Activity Codes**

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# 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:
  - » Bringing potentially eligible individuals into the Medi-Cal system for the purpose of determining eligibility.
  - » 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 should 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 Examples

## » Code 4

“Provided a list of local health clinics that accept Medi-Cal students and families.”

## » Not Code 4

“Provided information to students about the Wellness Fair.”  
(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.
- » This includes the following activities:
  - » Assisting individuals or families to complete a Medi-Cal application,
  - » Related paperwork, clerical activities, or staff travel required to perform these activities.
  - » Initiating and responding to email and voicemail regarding applications.
- » Note: This activity does not include the actual determination of Medi-Cal eligibility.

# Code 6 Examples

## » 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

- » Code 8 should be used when TSPs perform referrals for, coordinate, and/or monitor the delivery of Medi-Cal covered services.
- » This includes the following:
  - » 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 email and voicemail for Medi-Cal covered services.

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

- » The following activities must not be claimed as Code 8:
  - » Making sure the IEP meeting is conducted.
  - » Referral and coordination for the assessment of IEP meeting services.
  - » Developing the initial IEP meeting goals.
  - » Determining eligibility for special education.
  - » Determining the student's placement.
  - » Writing the IEP.
  - » Ensuring Parental sign-off is obtained.
  - » Confirming IEP meetings with the parents are scheduled.
  - » Completing the IEP meeting.
- » These activities to develop the initial IEP are part of the education mandate and must be coded to Code 1 as opposed to Code 8.

# Code 8 Examples

## » 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 initial IEP goals.” (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 Examples

## » Code 10

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

## » 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.
- » Translation may be allowable as an administrative activity if it is not included as part of a direct medical service.
- » Note: Translation services that occur during an IEP meeting may be assigned to Code 12 depending on the moment response.
  - » TSP translating as 3<sup>rd</sup> party = Code 12
  - » TSP translating own work = Code 2Z

# Code 12 Examples

## » 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 providers.

# Code 14 FAQ

- » Q: Will Code 14 mainly be used for a decision-making/administration position because of the nature of the activities?
- » A: Yes, the TSP should have program planning and/or policy development in their job description.
- » Example of CQ to determine if TSP has policy development in their job description.
  - » Can you please provide examples of the duties listed in your job description?

# Code 14 Examples

## » 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)



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

- » The code should be used when the TSP is a LEC, LGA, or LEA coordinator and they are performing activities that are directly related to Medi-Cal Administrative Activities claims administration, coordination, and/or training activities.
- » 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.

# 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

- » Code 16 should be used for general administration activities & 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 must not be coded to Code 16:
  - » Functions that are considered overhead:
    - » Payroll,
    - » Maintaining inventories,
    - » Developing budgets,
    - » Executive functions, and
    - » Similar overhead-related activities.
    - » These activities are only allowable through the application of an approved indirect cost rate and must be coded to Code 1.
  - » 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)

# **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 Services
- » Code 9 – Transportation for Non-Medi-Cal Services
- » Code 11 – Non-Medi-Cal Translation
- » Code 13 – Program Planning, Policy Development, and Interagency Coordination Related to Non-Medi-Cal Services
- » 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/teaching services
  - » Employment and job training that is specific to education/curriculum
  - » Other activities that are not health related
  
- » Note:
  - » This code is the code of last resort. If the activity does not clearly fit in any other code, it should be coded to code 1.
  - » Code 1 should never be used for Pool 1 TSPs attending an IEP, which is a code 2Z activity.
  - » Anything around COVID safety protocols would falls under code 1.



## 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.
  - » **Example:**
    - » Informing families about non-Medi-Cal wellness programs and how to access these programs.
    - » Uploading job training PowerPoint sessions to be sent out to 12th graders across the district.
    - » Discussing services provided by the District that are available to families (homeless services, foster care, etc.) at a Community Fair.

# Code 5 – Facilitating Application for Non-Medical 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.

» **Examples:**

- » Helping a student fill out a CalWORKs health questionnaire.
- » Speaking to a student in regards to the process for applying for college financial assistance.
- » Developing and verifying initial and continuing eligibility for the National School Lunch Program.

# 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-health related services, such as educational services.
  - » **Example:**
    - » Trying to inquire if social services can assist with finding childcare/after-school program for a foster youth student.
    - » 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 an individual to obtain transportation to services that are not health related, or accompanying the individual to services that are not health related.
  - » **Example:**
    - » Assigning field trips to school bus drivers.
    - » Arranging transportation for school sporting events.
    - » Reviewing transport arrangements to take homeless students to a college placement interview.

# Code 11 – Non-Medi-Cal Translation

» This code should be used when a TSP is providing translation services for non-health related activities.

» **Example:**

- » Arranged translation with the secretary to assist a parent with finding childcare services for her children.
- » Arranged translation for a student seeking employment services.

# Code 13 – Planning/ Development/ Interagency Coordination

» This code should be used when TSPs perform collaborative activities with other agencies associated with development of strategies to improve coordination and delivery of non-medical/ non-mental health services to students and their families.

» **Example:**

- » Developed strategies to increase social services offered to homeless students.
- » Met 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.

» **Example:**

» My random moment happened during our lunch time. I was sitting at my desk eating my lunch.

**Note:** The RMTS software will initially ask the TSP if they were working at the time of their assigned moment. LEA Coordinators may assist in verifying attendance during the coding review process.

# Code 18 – Invalid Moment/No Response

» This code should be used when an active TSP fails to provide a response to an assigned moment within the required four student attendance day response time.

» **Example:**

» When a TSP is at work during their moment and decides not to answer the moment within the specified time.

**Note:** For TSPs who were on leave but failed to notify their coordinator prior to moment expiration, Code 18 will be initially assigned to a non-response until the TSP's leave status is verified by the LEA Coordinator.



# Section 4: Direct Service Activity Codes

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# Code 2 – Direct Medical Services

- » Code 2 is split into two different sub-codes:
  - » 2A (allowable under the LEA BOP) – 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 a noncovered direct medical service, or an extension of a noncovered direct medical service.

# Pre-Sample Question

This question 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? ”

» Potential answers to pre-sample question:

- » Yes → Code 2A or 2Z (Review moment response to confirm)
- » No → Do not code to 2A. Review moment response and code accordingly
- » Not Sure → Ask a Qualifying 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. Teacher consultations can also be Code 2 or Code 8 depending on the TSP's Cost Pool

# 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.
- » Following cleaning protocols before/after student specific service (including COVID protocols).

# 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
- » "I was writing a student assessment report in preparation for an upcoming Individualized Education Program (IEP) meeting." – Code 2A.
- » "I was discussing a student's psychological assessment results with his parent." – 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.
- » 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 reporting out a student’s psychological assessment results during a student’s IEP meeting.” – Code 2Z
- » “I was inventorying medical supplies” – 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 provider or the consulting provider?**

- » A: For moments when two direct service providers 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](#), 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?**

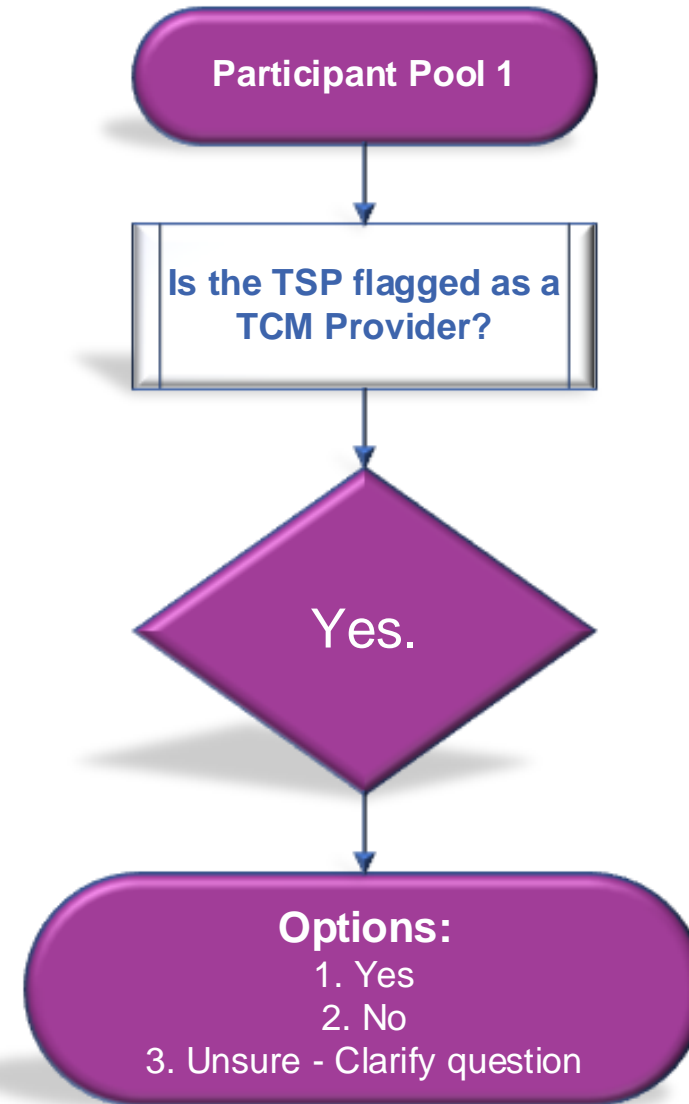
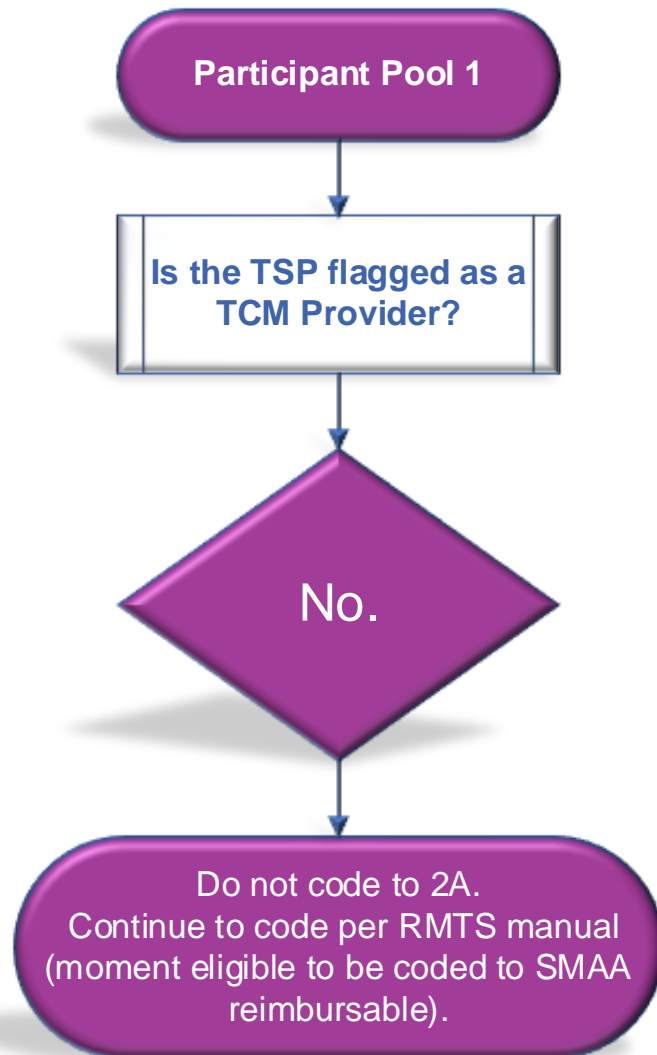
» A: Yes. The moment would be coded 2A and override the initial "no" response.

## Code 2 – FAQ #4

**Q: If a TCM certified TSP provides a moment response that indicates they completed TCM related services, how would it be coded?**

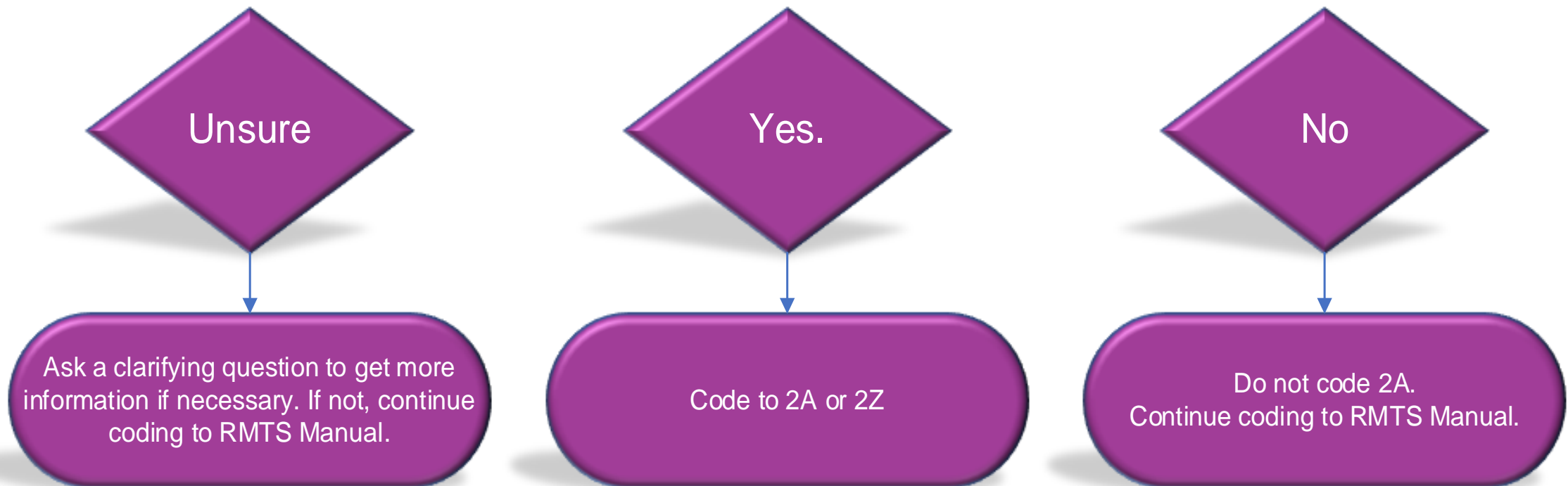
- » A: The coder must look at the TSP's response to pre-sample question #2 and proceed as described below. If the TSP's response to pre-sample question #2 was:
  - » Not sure → Ask a clarifying question and code according to the RMTS manual.
  - » No → Cannot be Code 2A. Continue coding per the RMTS manual.
  - » Yes → Code to either Code 2A or 2Z.
- » Please remember: TCM certified TSPs cannot code to Codes 8, 10, or 12.

# Coding TCM-Related Moments



# Coding TCM-Related Moments

» If the TSP is TCM certified, then you check the TSPs answer to the pre-question.



# Training Related FAQ

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

- » A: Code 1 is typically used for trainings that are school, curriculum, or education related.
- » Code 2Z is for 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 school/district wide trainings.

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

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# Activity Codes

**Parallel**

**Non-Parallel**

**Interrelated**

**LEA BOP**

2A 2Z

<b>SMAA Parallel Codes</b>	
<b>Non-Medi-Cal</b>	<b>Medi-Cal</b>
<u>Code 3</u> Non Medi-Cal Outreach	<u>Code 4</u> Medi-Cal Outreach
<u>Code 5</u> Facilitating Application for Non Medi-Cal Programs	<u>Code 6</u> Facilitating Medi-Cal Application
<u>Code 7</u> Referral, Coordination, and Monitoring of Non Medi-Cal Services	<u>Code 8</u> Referral, Coordination, and Monitoring of Medi-Cal Services
<u>Code 9</u> Arranging Transportation for non-Medi-Cal Services	<u>Code 10</u> Arranging Transportation in Support of Medi-Cal Services
<u>Code 11</u> Non Medi-Cal Translation	<u>Code 12</u> Translation Related to Medi-Cal Services
<u>Code 13</u> Program Planning, Policy Development, and Interagency Coordination Related to Non Medi-Cal Services	<u>Code 14</u> Program Planning, Policy Development, and Interagency Coordination Related to Medi-Cal Services

# Activity Codes

Parallel

**Non-Parallel**

Interrelated

<b>SMAA Non-Parallel Codes</b>	
<u>Code 1</u> School-Related, Educational, and Other Activities	<u>Code 15</u> Medi-Cal Claims Administration, Coordination and Training
	<u>Code 16</u> General Administration/Paid Time Off
	<u>Code 17</u> Not Working/Not Paid
	<u>Code 18</u> Invalid Moment/No Response

# Activity Codes

Parallel

Non-Parallel

**Interrelated**

**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, Educational,  
and Other Activities

- School-related activities **that are not health-related**
- Activities specific to **education/curriculum**
  - 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 in any other code, it should be coded to code 1.

**Code 16**  
General Administration/Paid  
Time Off

**Facilities, District Functions & Ops**

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

**Paid Time Off**

- This code also captures paid time off.
  - Defined as an 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 curriculum, instruction or students
  - School-wide training, Professional Development, Staff meeting

Note: If an activity does not fit into a specific activity code, then it must be coded to code 1 and not to code 16.



Interrelated

**Code 1**  
 School-related, Educational,  
 and Other Activities

Vs.

**Code 16**  
 General Administration/Paid  
 Time Off

<b>Code 1</b>	<b>Code 16</b>
<p><b>Education Requirements</b></p> <ul style="list-style-type: none"> <li>• Performing administrative or clerical activities specific to instructional, curricular, student-focused areas (e.g., attendance)</li> <li>• Performing activities related to immunization requirements for school attendance</li> <li>• Enrolling new students or obtaining registration information</li> <li>• Compiling, preparing, and reviewing reports on textbooks or attendance</li> <li>• Reviewing the education record for students who are new to the school</li> <li>• Conducting external relations related to school/educational issues/matters</li> </ul>	<p><b>Education Requirements</b></p> <ul style="list-style-type: none"> <li>• Does not qualify under Code 16</li> </ul>
<p><b>Instruction</b></p> <ul style="list-style-type: none"> <li>• Providing classroom instruction (including lesson planning)</li> <li>• Testing, correcting papers, completing reports</li> <li>• Monitoring student academic achievement</li> </ul>	<p><b>Instruction</b></p> <ul style="list-style-type: none"> <li>• Does not qualify under Code 16</li> </ul>



**Code 1**  
School-related, Educational,  
and Other Activities

Vs.

**Code 16**  
General Administration/Paid  
Time Off

<b>Code 1</b>	<b>Code 16</b>
<p><b>IEP</b></p> <ul style="list-style-type: none"> <li>Developing, coordinating, and processing the components of the IEP for a student, which includes ensuring that annual reviews of the IEP are conducted, parental sign-off is obtained, IEP meetings are scheduled, and the IEP is completed</li> </ul>	<p><b>IEP</b></p> <ul style="list-style-type: none"> <li>Does not qualify under Code 16</li> </ul>
<p><b>Operations</b></p> <ul style="list-style-type: none"> <li>Performing administrative or clerical activities related to general operations such as accounting, budgeting (including budget development and monitoring of program expenditures), payroll, purchasing and data processing (when these activities are not included in the indirect rate)</li> <li>Compiling, preparing, and reviewing reports related to instruction, curriculum, or student operations</li> </ul>	<p><b>Operations</b></p> <ul style="list-style-type: none"> <li>Fulfilling administrative and oversight responsibilities as Assistant Superintendent, Principal, or Assistant Principal</li> <li>Compiling, preparing, and reviewing reports related to overall general operations, but unrelated to the instructional, curricular, or student information</li> </ul>



**Code 1**  
 School-related, Educational,  
 and Other Activities

Vs.

**Code 16**  
 General Administration/Paid  
 Time Off

<b>Code 1</b>	<b>Code 16</b>
<p><b>Meetings and Training</b></p> <ul style="list-style-type: none"> <li>• Coordinating, participating in, or presenting training related to curriculum, instruction, student focused areas with the goal to improve the delivery of student services for programs other than Medi-Cal.</li> <li>• Attending or facilitation of school or unit staff meetings, board meetings, or required in-service trainings and events related to curriculum, instruction, or student focused areas including discipline and behavior.</li> </ul>	<p><b>Meetings and Training</b></p> <ul style="list-style-type: none"> <li>• Coordinating, participating in, or presenting training necessary to clarify site and district policy, procedures or issues related to employees.</li> <li>• Attending or facilitation of school or unit staff meetings, board meetings, or required in-service trainings and events (not related to curriculum, instruction, or students).</li> <li>• Professional Development trainings</li> </ul>
<p><b>Review and Planning</b></p> <ul style="list-style-type: none"> <li>• Reviewing articles related to curriculum and instructional services.</li> <li>• Evaluating curriculum and instructional services, student/teacher policies, and procedures as they relate to student instruction for the school site or district.</li> </ul>	<p><b>Review and Planning</b></p> <ul style="list-style-type: none"> <li>• Reviewing technical literature and research articles.</li> </ul>





**Code 1**  
School-related, Educational,  
and Other Activities

Vs.

**Code 16**  
General Administration/Paid  
Time Off

Code 1	Code 16
<p><b>Supervision</b></p> <ul style="list-style-type: none"> <li>• Providing general supervision of students (e.g., playground, lunchroom)</li> <li>• Conferring with students/parents about discipline, academic matters, or other school non-health related issues</li> <li>• Applying discipline activities with students</li> <li>• Handling behavioral issues with students</li> </ul>	<p><b>Supervision</b></p> <ul style="list-style-type: none"> <li>• Providing general supervision of staff, including supervision of student teachers or classroom volunteers</li> <li>• Evaluation of employee performance (including person being evaluated)</li> </ul>
<p><b>Survey Participant Paperwork</b></p> <ul style="list-style-type: none"> <li>• Paperwork related to initial IEP development</li> <li>• Completing student academic progress reports</li> </ul>	<p><b>Survey Participant Paperwork</b></p> <ul style="list-style-type: none"> <li>• Completing expense claims as required for work-related travel</li> </ul>
<p><b>Paid Time off</b></p> <ul style="list-style-type: none"> <li>• Does not qualify under Code 1</li> </ul>	<p><b>Paid Time off</b></p> <ul style="list-style-type: none"> <li>• Paid time off (when you are being paid, but you are not at work)</li> <li>• Includes vacation days, jury duty, sick leave and lunch breaks (if it is paid time)</li> </ul>



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

- Referrals for, coordinating, and/or monitoring the delivery of Medi-Cal covered services
- Includes:
  - Related paperwork, clerical activities, or staff travel necessary to perform these activities
  - Gathering any information in advance that may be required for medical/dental/mental health referrals

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

**42 CFR 440.169**

- Ensure the care plan is *effectively* implemented
- Monitoring may be conducted as frequently as necessary to help determine whether the following conditions are met:
  - Ensuring services are being furnished in accordance with the individual's care plan;
  - Ensuring services in the care plan are adequate; and
  - Reviewing if there are changes in the needs or status of the eligible individual
- Adjustments to the care plan and service arrangements with providers

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

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



### **Code 8**

Referral, Coordination, and  
Monitoring of Medi-Cal  
Services

**Vs.**

### **Code 2**

Direct Medical Services

- The TSP's Participant Pool should be examined when coding for Code 2 versus 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 speech language pathologist in Pool 2 may submit a moment related to the provision of speech therapy services.
- When two direct service providers are discussing a student's progress, it is important to examine which TSP's is performing the direct medical service.
- The TCM Decision Tree will help central coding staff evaluate TCM-related moments.

**Interrelated**

# Section 6: Clarifying Questions

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# Clarifying Question

Definition:

- » Open-ended question used to gain additional information to assign the correct activity code

# Clarifying Questions (CQs)

- » CQs must be open-ended and cannot be leading questions.
- » No more than two (2) CQs can be asked for a given moment response.
- » A 10% sample of CQs are reviewed quarterly.
- » Please ask CQs on any moment that is unclear.
- » A CQ can be given in the form of a statement.



# Clarifying Questions: Examples of Open-Ended Questions

- » What specific need were you discussing during the one-minute survey?
- » Can you please describe the specific services you were discussing at the time of the one-minute survey?
- » Without violating privacy, can you please provide detail of what was being discussed with the nurse during the one-minute survey?
- » Please be more specific about the topic of the email you were checking at the time of your 1-minute moment.
- » Please indicate whether this activity is related to an Initial, Annual, or Triennial IEP meeting.
- » Note: No (PII) Personal Identifiable Information

# Clarifying Questions: Examples of Leading Questions

- » Did you discuss a Medi-Cal service at the meeting you attended during your moment?
- » Did the outreach activity during your moment involve passing out Medi-Cal flyers?
- » Is the activity described in this moment related to a Medi-Cal service?

# Section 7: Moment Response and Code Assignment

The slide features a decorative graphic consisting of several overlapping, wavy, horizontal bands in various shades of purple and magenta, positioned below the main title and above the page number.

# Section 7: Moment Response and Code Assignment

- » Section 7A: LEA BOP (Operations Unit) Moment Response and Code Assignment
- » Section 7B: SMAA Moment Response and Code Assignment

# **Section 7A: LEA BOP Operations Unit Moment Response and Code Assignment**

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# Code 2A and 2Z

- » In LEA BOP, there are two codes that are reviewed which are code 2A and 2Z.
  - » 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.

# Moment Response # 1

## OCCUPATIONAL THERAPIST Pool 1

PS Q2: Yes.

Who: I am by myself.

What: I was organizing treatment supplies and creating a sample project for a pending OT sessions.

Why: In order to provide students with an activity related to the acquisition of their IEP goals.

# Answer # 1

## Code

2A

**Reason:** This moment is an extension of a covered LEA BOP occupational therapy service for an IEP student and is considered a Code 2A.



# Moment Response # 2

## LICENSED SPEECH LANGUAGE SPECIALIST

### Pool 1

PS Q2: Yes.

Who: By myself.

What: Writing a report for an IEP.

Why: In preparation for an upcoming IEP meeting.

# Answer # 2 Code

# 2A

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

# Moment Response # 3

## LICENSED NURSE Pool 1

PS Q2: Yes.

Who: Myself in the office.

What: Talking to a parent to update a health assessment.

Why: To finish a health assessment for an upcoming IEP meeting.

# Answer # 3

## Code

2A

**Reason:** Code 2A includes interviewing the parent/guardian when conducting an assessment.

# Moment Response # 4

## SPEECH LANGUAGE PATHOLOGIST Pool 1

PS Q2: Yes.

Who: I was by myself.

What: I was documenting therapy services.

Why: I was reporting what happened in the student's session today.

# Answer # 4 Code

# 2A

**Reason:** Documenting direct services are considered a 2A (extension of a medical service).

# Moment Response # 5

## 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?

Response: 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 # 5

## 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.



# Moment Response # 6

## CREDENTIALLED SCHOOL PSYCHOLOGIST Pool 1

PS Q2: Yes.

Who: No one.

What: Grading an assessment.

Why: To complete a report.

# Answer # 6

## Code

2A

**Reason:** Grading assessment reports are a component of the evaluation and should therefore be coded as a 2A.

# Moment Response # 7

## LICENSED SPEECH THERAPIST Pool 1

PS Q2: Yes.

Who: Student.

What: I was completing a standardized assessment with a 3rd grade student.

Why: I was completing this assessment as part of a triennial evaluation.

# Answer # 7

## Code

2A

**Reason:** Completing an assessment for a triennial evaluation is considered a Code 2A.

# Moment Response # 8

## 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 a comprehensive assessment for the purpose of transition planning to kindergarten next school year.
- CQ 1: Please elaborate further on the reason for the comprehensive assessment in which you were observing the student during the 1-minute moment.
- Response: 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 # 8

## Code

# 2A

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

# Moment Response # 9

## CREDENTIALLED SCHOOL PSYCHOLOGIST Pool 1

- PS Q2: Yes.
- Who: With a parent.
- What: Conducting a parent interview.
- Why: For a parent interview.
- CQ 1: Please specify and provide further details on the purpose of the parent interview conducted during the 1-minute moment.
- Response: Conducted a parent interview to gather parent concerns.
- CQ 2: You answered "Yes" to the pre-question. Please provide further details on the purpose of the parent interview conducted during the 1-minute moment and its relation to a student assessment, IEP, IFSP, or Care Plan.
- Response: Parent interviews are essential to gather information about student, to know what parents are concern about. We start an IEP meeting with concerns and strengths to be able to individualized the plan and best support the student.

## Answer # 9 Code

# 2A

**Reason:** Interviewing the student and/or parent/guardian is considered an example of allowable pre- and post-service time related to assessments.



# Moment Response # 10

## CREDENTIALLED 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.
- CQ 1: Please specify and provide further details on the aspect of the IEP you were entering into SEIS during the 1-minute moment.
- Response: Progress notes.
- CQ 2: Please specify the aspect of the IEP the progress notes worked on during the 1-minute moment address.
- Response: I was entering student progress notes into the SEIS system for the students on my caseload.

# Answer # 10

## Code

# 2A

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

# Moment Response # 11

## SPEECH LANGUAGE PATHOLOGY ASSISTANT Pool 1

- PS Q2: Yes.
- Who: The preschool SLP.
- What: Entering SpEdCare data
- Why: So that the school gets compensated for the children we serviced.
- CQ 1: Please specify the type of service provided for which you were entering data during the 1-minute moment and specify who conducted that service.
- Response: Billing.
- CQ 2: Please specify the type of service you billed during the 1-minute moment and specify who conducted that service.
- Response: I was entering service minutes for the pre-school students seen at Mulberry Elementary School for yesterday's session.

# Answer # 11

## Code

# 2A

**Reason:** Code 2A includes pre- and post-time directly related to providing direct care services when the student is not present, including time to complete all paperwork related to the specific direct care service and completion of billing activities.

# Moment Response # 12

## CREDENTIALLED SPEECH LANGUAGE PATHOLOGIST Pool 1

- PS Q2: Yes.
- Who: I was in the office by myself.
- What: I was writing an assessment report.
- Why: To finish assessing the student.
- CQ 1: Please specify the type of assessment report written during the minute moment.
- Response: Tri
- CQ 2: Please specify the reason for the triennial assessment report written during the 1-minute moment and provide further details on what the assessment addresses.
- Response: The assessment is to evaluate student's use of an AAC device.

# Answer # 12

## Code

# 2A

**Reason:** Writing a report to summarize assessment results and recommendations is considered a Code 2A.

# Moment Response # 13

## PSYCHOLOGIST Pool 1

PS Q2: No.

Who: I was by myself.

What: I was cleaning the table, PPE, and chair where I will be testing a student later, the person that tested a student the day before didn't wipe it down.

Why: For my safety and the safety of the students coming on campus to test for their assessment.

# Answer # 13

## Code

# 2A

**Reason:** Following cleaning protocols before/after student specific service (including COVID protocols) is covered under code 2A.



# Moment Response # 14

## SPEECH LANGUAGE PATHOLOGIST Pool 1

PS Q2: Yes.

Who: I was by myself.

What: I was creating a lesson for a group therapy session.

Why: I have a session tomorrow and need to develop materials.

# Answer # 14

## Code

# 2A

**Reason:** Planning activities for services when students have IEPs/IFSPs/Care Plans are considered a Code 2A.

# 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



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

# Moment Response # 16

## REGISTERED NURSE Pool 1

- PS Q2: No.
- Who: Myself.
- What: Completing and submitting paperwork for stock EpiPens for my school district.
- Why: I need to submit this paperwork annually.
- CQ 1: What type of paperwork are you completing and how will the stock EpiPens be utilized?
- Response: I was completing and submitting paperwork to Bioridge (EpiPens4schools). The stock EpiPens will be utilized in an anaphylaxis emergency situation for staff or students.

# Answer # 16

## Code

2Z

**Reason:** This moment relates to a group of students that may require EpiPens. This moment relates to inventorying supplies used for emergency treatment.

# Moment Response # 17

## SCHOOL NURSE Pool 1

- PS Q2: No.
- Who: Coworker.
- 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 will be included on a care plan?
- Response: It was for an Epi Pen due to an allergy to fish. No separate care plan will be done.

# Answer # 17

## Code

2Z

**Reason:** The student does not have a care plan (and one will not be developed, as noted in the moment response).



# Moment Response # 18

## SPECIAL EDUCATION TEACHER Pool 2

- Who:** My co-teacher, paraprofessional, and our class of students.
- What:** I was providing training and coaching to the paraprofessional regarding the support needs of one of the students with an IEP.
- Why:** I was performing this activity because the student has complex needs including communication needs, executive function needs, motor planning needs, and self help needs. Specific training is essential for the student to be properly supported.

# Answer # 18

## Code

# 2Z

**Reason:** This a pool 2 practitioner so they would not be eligible for a Code 2A. Based on the SMAA Manual, Code 2Z, bullet D, “Training a direct service practitioner on how to conduct a direct service”.

# Moment Response # 19

## 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 # 19

## Code

2Z

**Reason:** This moment was more of a general planning activity, versus tied to a assessing a specific student and would therefore be a Code 2Z.

# Moment Response # 20

## CREDENTIALLED SCHOOL COUNSELOR Pool 1

PS Q2: No.

Who: One of my students on my caseload who does not have an IEP.

What: Teaching a lesson.

Why: I was working with my student to support their social-emotional well-being.

# Answer # 20

## Code

2Z

**Reason:** Counseling provided to students without IEPs/IFSP/Care Plans cannot be coded to 2A.

# Moment Response # 21

## TRAINED HEALTH CARE AID Pool 1

- PS Q2: No.
- Who: Other students on lunch and Staff on lunch duty.
- What: I was supervising a student at lunch time.
- 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?
- Response: 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?
- Response: A recommendation by the nurse in the health/status summary on the present levels page of the IEP and on the School Health Assessment for Triennial IEP Evaluation. 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 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/LGA will produce a Quarterly Coding Report (QCR) within 30 days of coding being finalized for the quarter.
- » Each claiming unit will have 30 days to review the QCR data to ensure accuracy and submit corrections to the LEC/LGA.
- » For any specific coding assignment for which the claiming unit and LEC/LGA are unable to reach an agreement, the coding appeals process can be utilized (*process contained in SMAA Manual*).
- » Request for coding appeals must be submitted to DHCS within 30 days of the LEC/LGA decision on the request for a correction.
- » DHCS will issue a written decision to all parties involved within 60 business days after the request for appeal has been received.

# Section 7B: SMAA Moment Response and Code Assignment

# Moment Response #1

## HEALTH CARE ASSISTANT Pool 1

PS Q2: No.

Who: I was alone.

What: I was delivering supplies.

Why: Classrooms needed face mask for adults and children, disinfecting wipes, and gloves.

# Answer # 1

## Code

1

**Reason:** Anything around COVID/illness related protocols would fall under code 1.

# Moment Response #2

## TEACHER K-12 Pool 2

Who: Myself.

What: Getting COVID tested.

Why: It is part of my job.

# Answer # 2

## Code

1

**Reason:** Anything around COVID/illness protocols would fall under code 1.

# Moment Response # 3

## PRINCIPAL Pool 2

Who: I was by myself.

What: I was on the computer.

Why: I was checking emails.

CQ1: Please describe the nature of the email.

Response: The email was regarding renting the football field for an event.

# Answer # 3

## Code

16

**Reason:** Typically checking emails would be code 1; however, this was related to general school facilities, it is code 16.



# Moment Response # 4

## OCCUPATIONAL THERAPIST Pool 1

PS Q2: No.

Who: Myself.

What: Driving in my car from the COVID PCR testing site.

Why: I needed to get COVID tested weekly per LAUSD policy, and due to possible close exposure.

# Answer # 4

## Code

1

**Reason:** Anything around COVID safety protocols would falls under code 1.

# Moment Response # 5

## HEALTH CARE ASSISTANT Pool 1

PS Q2: Not sure.

Who: With the RSP teacher.

What: Waiting for an assignment.

Why: I was assigned to assist RSP teacher.

# Answer # 5

## Code

1

**Reason:** Please ask a clarifying question to explain the acronyms. If an activity does not fit into a specific activity code, then it must be coded to code 1.

# Moment Response # 6

## SCHOOL PSYCHOLOGIST Pool 1

PS Q2: Yes.

Who: I was with the speech language pathologist.

What: We were discussing special education programs and speech language services for a student who was just assessed for initial placement.

Why: We were performing this activity to determine what the student will need in order to progress in his educational development.

# Answer # 6

## Code

1

**Reason:** Developing the initial IEP is a part of an education mandate. This includes related activities such as developing the initial IEP goals, determining eligibility for special education, determining the student's placement, and writing the IEP.

# Moment Response # 7

## SPEECH LANGUAGE PATHOLOGIST Pool 1

- PS Q2: No.
- Who: No one, I was by myself.
- What: I was writing an email to another SLP in another district.
- Why: To try and obtain a file for a student.
- CQ 1: Please elaborate further on the purpose of the email written during the 1-minute moment and expand on the reason for obtaining the student file.
- Response: There is a new student enrolling at Brightwood, and parents do not have a copy of the child's IEP. I was writing an email to the previous SLP to obtain a copy of the student's IEP and to request his file be sent over.

# Answer # 7

## Code

8

**Reason:** SLP to another SLP requesting information for coordination of Medi-Cal service.



# Moment Response # 8

## COUNSELOR Pool 2

- Who: I'm by myself in my office.
- What: I'm working on a staff presentation regarding PBIS. Coming up with the agenda and plugging in completed graphics and assignments into the presentation.
- Why: We have an all-staff meeting tomorrow (2/9) that's centered around PBIS. I'm part of the PBIS committee that's been tasked to update the staff on our PBIS initiatives for the remainder of the school year as well as next school year.
- CQ 1: Please specify the acronym PBIS and provide further details on the goal for PBIS.
- Response: PBIS stands for Positive Behavior Intervention and Support. It is a district-wide Initiative to promote school culture and encourage positive behaviors around campus. The goal is to decrease negative behavior and develop a preventative mindset when it comes to problematic behavior.

# Answer # 8

## Code

1

**Reason:** TSP was preparing for and providing behavior management principles for students. (1U)

# Moment Response # 9

## SPEECH LANGUAGE PATHOLOGIST Pool 1

- PS Q2: Yes.
- Who: I was with the school psychologist.
- What: I was discussing a new student who will be transitioning to ATP during the summer.
- Why: To learn about a new student's speech/language goals and services, including her AAC needs.
- CQ 1: Please define the acronyms ATP and AAC. Please avoid using acronyms when responding to your moment.
- Response: Adult Transition Program (ATP) and Augmentative and Alternative Communication (AAC)

# Answer # 9

## Code

8

**Reason:** Based on 8L from the SMAA Manual. The TSP was discussing with the school psychologist to coordinate or review a student's needs for health-related services covered by Medi-Cal.

# Moment Response # 10

## COORDINATOR OF SPECIAL EDUC Pool 2

- Who: Alone.
- What: Running a Preschool Special Education Transition Meeting.
- Why: Preschool aged students transition to Kinder and must have an IEP meeting.
- CQ 1: What type of services does the preschool student currently receive that will be transitioned to an IEP?
- Response: Speech and Language, Specialized academic instruction, Occupational Therapy

# Answer # 10

## Code

1

**Reason:** Code 1 because developing the initial IEP is a part of an education mandate.

# Moment Response #11

## COUNSELOR Pool 2

Who: A student.

What: Explaining wellness services.

Why: Student self-referred and wanted more information.

CQ 1: Please provide detail of the type of wellness services you were explaining during the one-minute survey?

Response: Counseling in our wellness center.

# Answer # 11

## Code

7

**Reason:** Wellness services are not considered Medi-Cal related services.



# Moment Response # 12

## SPEECH/LANGUAGE SPECIALIST Pool 1

- PS Q2: Yes.
- Who: Myself.
- What: Parent phone calls, left voicemails with both parents.
- Why: To request that parents sent AT/AAC (Augmentative and Alternative Communication Device) device for communication to school with student.
- CQ 1: What does AT/AAC stand for?
- Response: AT/AAC is an Augmentative and Alternative Communication Device.

# Answer # 12

## Code

8

**Reason:** The TSP was Coordinating the completion of the prescribed services.

# Moment Response # 13

## SDC TEACHER Pool 2

**Who:** I was working with students in Directed Study class who have IEPs or 504s.

**What:** I was working with a student who was struggling in an online English class, and she was stressed and overwhelmed near the point of tears. We determined a game plan on how to manage her stress and reached out to her counselor.

**Why:** As part of my position, I work with students on a variety of different subjects and try to support mental health as they arise, but staffing is thin with counselors and school psychologists.

# Answer # 13

## Code

1

**Reason:** Please re-assign to Code 1 per SMAA Manual section 5-3 letter D. Should have asked a clarifying question asking what specific activity the TSP was performing during the 1-minute moment.

# Moment Response # 14

## PRINCIPAL Pool 2

Who: My staff.

What: Holding staff meeting.

Why: Meeting was related to SSTs, IEP, and COVID protocols.

# Answer # 14

## Code

1

**Reason:** Assign moment response to Code 1 as it is related to curriculum and student focused area.

# Moment Response # 15

## DIRECTOR Pool 2

Who: Special Ed Administrators.

What: Planning for the mental health needs of students.

Why: A part of my job.

# Answer # 15

## Code

1

**Reason:** A CQ is needed to determine what type of planning the TSP was doing; educational assistance, assessments, referrals, staffing, etc. Without knowing that, it can't be accurately coded and can't be reimbursed by SMAA.



# Moment Response # 16

## OCCUPATIONAL THERAPIST Pool 1

PS Q2: Yes.

Who: Student.

What: Consulting with a teacher and student.

Why: IEP Goals.

# Answer # 16

## Code

8

**Reason:** Referral, Coord., and Monitoring of Medi-Cal Services.

# Moment Response # 17

## PSYCHOLOGIST Pool 1

- PS Q2: Yes.
- Who: Behavior Specialist II, Lead Special education teacher, Assistant Principal, and speech therapist.
- What: Developing a behavior support plan for a student with an IEP.
- Why: Student's negative behaviors have escalated in the last week, so the team came together to develop a behavior plan for this student before he returns from suspension.

# Answer # 17

## Code

8

**Reason:** Referral, Coord., and Monitoring of Medi-Cal Services. However, please ask a CQ next time to determine 2 things:

- 1) If the student already had behavioral interventions in their IEP
- 2) If this occurred during an IEP meeting

# Moment Response # 18

## TEACHER Pool 2

- Who: Student and his parents.
- What: Reviewing medical related services.
- Why: As part of student's IEP.

# Answer # 18

## Code

1

**Reason:** Should have asked a CQ next time to determine if this occurred during an IEP meeting. If it does not occur during an IEP meeting it may be coded to Code 8.

# Moment Response # 19

## PSYCHOLOGIST Pool 1

PS Q2: Yes.

Who: TOSA.

What: Discussing a behavior of a student.

Why: Due to a behavior incident on Thursday. Discussion included scheduling an IEP to document incident.

# Answer # 19

## Code

1

**Reason:** Behavioral issues are typically Code 1 unless already established through an IEP. A CQ should have been asked to clarify if the student already had an IEP, or if the TSP wanted to create an initial IEP. Without knowing that, we can't allow it to be coded to a reimbursable code.



# Moment Response # 20

## CREDENTIALLED SCHOOL PSYCHOLOGIST

### Pool 1

PS Q2: Yes.

Who: School Psychologist.

What: Consult for Behavior.

Why: Planning for behavior intervention.

CQ 1: Please confirm, was this consultation for a student? If so, who will be presenting and working with the student towards their behavior intervention?

Response: It was for a student, and the school psychologist I was consulting with and will be working with the IEP team.

# Answer # 20

## Code

8

**Reason:** It is a code 8 activity based on section 5-10 bullet L, “Participating in a meeting/discussion to coordinate or review a student’s needs for health-related services covered by Medi-Cal.”

# Moment Response # 21

## LICENSED OCCUPATIONAL THERAPIST Pool 1

PS Q2: Yes.

Who: SPED Teacher.

What: Discussing tomorrow's morning occupational therapy group.

Why: Creating secondary plans, due to having to be in an IEP at that time.

# Answer # 21

## Code

1

**Reason:** Without a CQ, we can't determine whether the secondary plans were OT or educationally based.

# Moment Response # 22

## OFFICE CLERICAL STAFF Pool 2

- Who: Teachers, Counselors, and a Principal.
- What: Filling out "Request to Attend" forms.
- Why: Staff will be attending a conference.

# Answer # 22

## Code

1

**Reason:** Not Code 16 because that is meant for general administration of building and facilities. This would be more clerical work and fit better as Code 1. Should have asked a clarifying question, what the conference is about?

# Moment Response # 23

## OFFICE CLERICAL STAFF Pool 2

Who: I was alone in my office.

What: Working on submitting Office Depot and Southwest orders for the end of the school year.

Why: To supply the school with necessary items to end the school year.

# Answer # 23

## Code

1

**Reason:** Refer to Code 1 vs Code 16 matrix regarding the overhead.



## Moment Response # 24

### PRINCIPAL AND/OR ASSISTANT PRINCIPAL Pool 2

- Who: The teaching staff at Highland Grove Elementary School.
- What: Attending a training.
- Why: To learn about the offerings from RCSS.

# Answer # 24

## Code

1

**Reason:** Without a CQ, we can't determine what offerings were being presented about RCSS and what it stands for.

# Moment Response # 25

## CREDENTIALLED SCHOOL COUNSELOR Pool 1

PS Q2: No.

Who: School Principal, 2 Sixth Grade Teachers, and a consultant specializing in Positive Behavior Intervention Supports applications.

What: We were going through Tier 1, 2 and 3 data filling out the Positive Behavior Intervention Supports application for Sky View Elementary.

Why: Every year our school applies for an award/recognition for the Positive Behavior Intervention Supports we are providing for our students on campus.

# Answer # 25

## Code

1

**Reason:** Would not be Code 16 because it is meant for general administration of building and facilities. This should be code 1 as it is related to receiving an award. It is important to consider if Medi-Cal should be paying for this activity. Code 1 should be code used if the activity does not fit in any other code.

# Section 8: Next Steps

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# Next Steps

- » School Counselor Moments Update Pending:
  - » Scope of services for credentialed counselors is defined in [Education Code Section 49600](#).
  - » Assembly Bill 2508 expanded the scope of services to include **individual and group counseling**.
  - » Assembly Bill 2508 will allow School Counselors to bill for counseling under the LEA BOP.
  - » Assembly Bill 2508 will allow counseling moments to be coded to 2A.
  - » DHCS will determine the effective date.
  - » DHCS will communicate effective date to all stakeholders.

# Next Steps

- » Update Pending on Health Education/Anticipatory Guidance:
  - » DHCS is in the process of further defining this service.
  - » DHCS will share the updates with stakeholders when the process of defining is completed.
  - » DHCS will send the LEA BOP definition of Health Education/Anticipatory Guidance policy to all stakeholders.
  - » DHCS will offer stakeholder training which will include examples of this service and details on health education or anticipatory guidance.
  - » Guidance will be added to the LEA BOP Provider Manual.

# Thank you!

- For general SMAA questions: [SMAA@dhcs.ca.gov](mailto:SMAA@dhcs.ca.gov)
- For general LEA BOP questions: [LEA@dhcs.ca.gov](mailto:LEA@dhcs.ca.gov)
- For LEA BOP RMTS questions: [RMTS@dhcs.ca.gov](mailto:RMTS@dhcs.ca.gov)