

BALTIMORE COUNTY PUBLIC SCHOOLS

DATE: April 24, 2007

TO: **BOARD OF EDUCATION**

FROM: Dr. Joe A. Hairston, Superintendent

SUBJECT: **THIRD PARTY BILLING ANNUAL REPORT – 2005-2006**

ORIGINATOR: J. Robert Haines, Deputy Superintendent

**RESOURCE
PERSON(S):** Barbara Burnopp, Chief Financial Officer

INFORMATION

The attached is an update on the Office of Third Party Billing for the 2005 –2006 school year. Information provided includes a historical overview, major accomplishments, revenues and expenses, training reports, and next steps for the Third Party Billing Program.

Attachment I – Third Party Billing Annual Report Executive Summary
Attachment II – Third Party Billing Annual Report 2005-2006

2005-2006 Third Party Billing Annual Report

Executive Summary

The Third Party Billing Program commenced in the spring of 1992 as a collaborative effort between Baltimore County Public Schools (BCPS) and the Baltimore County Department of Health. The Third Party Billing Program is a systemwide effort designed to recover health care costs from Medicaid for health care services rendered to BCPS students.

Funds recovered from the Third Party Billing Program supplement existing program budgets by funding staff positions, supplies, and equipment for several programs designed to enhance special education and health-related services.

The Office of Third Party Billing provides school-based training sessions to all service providers annually, offers incentive programs for schools designed to maximize the recovery of funds, conducts self-monitoring of the program to minimize audit findings, coordinates state monitoring visits conducted by the state health department and the Maryland State Department of Education (MSDE), coordinates visits by external Medicaid auditors, and works collaboratively with other school systems and MSDE on statewide issues that impact the Third Party Billing program.

For the 2005-2006 school year, the Third Party Billing Program had 5,326 students who qualified for the program. These students received approximately 145,000 services from BCPS providers that were billed to Medicaid.

The Office of Third Party Billing rewarded 140 schools with the Certificate of Achievement award. The Certificate of Achievement is given to each school that achieves a percentage of 95 or higher on submitting encounter data forms for case management services.

A facilitator position was also added to the Office of Third Party Billing. The primary role of the facilitator is to work collaboratively with schools and offices in order to ensure that all staff are trained in Third Party Billing Procedures. This individual has also reviewed all of the training material for the office and made changes that should improve compliance with the Medicaid regulations.

The Office of Third Party Billing collected \$8.4 million in revenue for the 2005-2006 school year. This is a \$1.4 million increase over the 2004-2005 school year revenue collections. The Office of Third Party Billing has worked successfully with schools, offices, principals, and families in order to decrease barriers to reimbursement that have been lodged against the program.

Baltimore County Public Schools

Office of Third Party Billing

Annual Report

2005-2006 School Year



Report Composed by:
Charles Tyler, Jr., Fiscal Manager
Office of Third Party Billing

Office of Third Party Billing

Annual Report

July 2005 – June 2006

I. Historical Overview

The Third Party Billing Program began in 1992 as a collaborative effort between Baltimore County Public Schools (BCPS) and the Baltimore County Department of Health (BCDH). The Third Party Billing Program is designed to recover health care costs from Medicaid for health care services rendered to BCPS students. Related services are provided based upon the Individualized Education Plan (IEP) and submitted for billing by speech/language pathologists, occupational therapists, physical therapists, audiologists, psychologists, nurses, and social workers. Transportation services provided to special education students were added as a billable service in 1999. As of June 1, 2006, there were 5,326 eligible special education students identified for third party billing in BCPS. These students constitute 37.93% of the special education population and 4.87% of the students attending BCPS.

Medicaid approved regulations for the billing of case management services in the 1993. Case management data is submitted by special education teachers and speech/language pathologists who coordinate special education services for students. A portion of the case management funds is returned to each school participating in the program, based upon the number of correct case management encounter data forms submitted to the Office of Third Party Billing.

In 2002, the Maryland State Department of Education (MSDE), in conjunction with the Department of Health and Mental Hygiene (DHMH), developed and implemented the

Autism Waiver Program. The Autism Waiver Program is specifically designed to assist the most severely autistic children in our society. In order for a child to qualify for the program, the parents must be willing to institutionalize their child if the program is not successful and must also declare the child as a family of one. The autism waiver had 900 openings statewide for the 2005-2006 school year; BCPS had 120 students on the autism waiver as of June 1, 2006.

Funds recovered from the Third Party Billing Program supplement existing program budgets by funding staff positions and supplies and equipment for several programs:

STAFF

- psychologists
- special education teachers
- school social workers
- instructional assistants
- interpreters
- health assistants
- bus drivers
- bus attendants

SUPPLIES & EQUIPMENT

- speech/language therapy
- psychology
- social work
- occupational therapy
- physical therapy
- nursing services
- school-based health centers

II. Major Accomplishments of the Office of Third Party Billing

- Held school-based training sessions for special education teachers and administrators
- Revised and improved the Third Party Billing Encounter Data Form to facilitate compliance with state and federal regulations
- Conducted two training sessions for 164 IEP chairpersons regarding case management procedures
- Monitored all encounter data forms received from schools in order to determine compliance of schools
- Worked collaboratively with the Office of Internal Audit in order to perform annual monitoring of third party billing data
- Issued 140 Certificate of Achievement awards to schools
- Updated case management, related services, and infants and toddlers training manuals
- Provided all related services office heads with accountability reports detailing the number of forms submitted by provider
- Updated the *Administrator's Guide to Accessing Third Party Billing Funds*.

III. Special Education Medicaid Population

Presently, BCPS has 5,326 Medicaid-eligible special education children for whom encounter data forms are collected and claims submitted to Medicaid. This figure constitutes 39.44% of the children currently receiving special education services. Exhibit A denotes the number of BCPS students who are eligible for the Third Party Billing Program by fiscal year. The Office of Third Party Billing has developed a plan to modify

internal procedures to assist in the Medicaid determination process. On a weekly schedule, the data in the student data tracking system is matched against the data in the third party billing system. The result is a report of students who are new to special education. This list is checked using the State of Maryland electronic verification system in order to determine Medicaid eligibility, schools are informed of the status of the student, and Encounter Data Forms are submitted for reimbursement. Exhibit B is the third party billing registration form that is sent home annually to the families of all special education students. Exhibit C charts the process for a third party billing registration form and parental consent.

IV. Training Sessions

In direct support of the *Blueprint for Progress*, Indicator 8.4, the Office of Third Party Billing provides an array of training sessions to BCPS employees. These sessions include related service provider training sessions, IEP chair training sessions, and school-based training sessions.

Related service provider training sessions are meetings designed to communicate new information regarding billing procedures to continuing employees. Separate training sessions are held at the new teacher induction for related service providers who are new to the school system. These training sessions are more intensive and are designed for employees who have a varied knowledge of billing requirements and procedures. Each attendee receives a *Related Service Training Manual*, which is revised annually in order to ensure accurate information for school-based staff. Exhibit D is a chart of the percentage of related service encounter data forms received by discipline. Exhibit E details the average

amount of reimbursement by discipline, based upon the percentage of encounter data forms submitted.

Training for all IEP chairs is completed annually in conjunction with the Office of Special Education. The sessions are designed to provide an overarching approach to the Third Party Billing Program. In addition, the sessions show the IEP chairs how to ensure accountability in the submission of case management encounter data forms.

The Office of Third Party Billing also provides school-based training sessions, which allow the special education teachers and other service providers the opportunity to ask detailed questions in a small group setting. All meeting attendees receive a *Case Management Training Manual*, which is revised on an annual basis. Exhibit F delineates the training sessions provided during the 2005-2006 school year. Exhibit G details the percentage of case management services provided to students by type.

For the 2005-2006 school year, the Office of Third Party Billing provided its annual survey to all school-based training session participants. The results of the survey are attached as Exhibit H.

Based upon the comments made by the participants in the training sessions, the Office of Third Party Billing implemented some changes including providing the survey to training participants no later than two weeks after the session and developing a list of common mistakes for those who are new to completing third party billing encounter data forms.

V. Creation of the Third Party Billing Facilitator Position

In May, 2006, the position of facilitator was filled. One of the critical functions of the position was to increase third party billing training sessions for schools. The intended goals were to ensure compliance with all third party billing requirements, stress record retention policies for audits, and determine mechanisms that can assist school-based staff to decrease errors on encounter data forms. To improve the encounter data form process, the form has been redesigned. Now, the pre-printed encounter data form is sent to providers and IEP chairs via e-mail as an Excel file. The provider can then use the tabs at the bottom of the screen in order to select the student's name. Once the selection is made, the form will appear with the student identification number, student name, birth date, school name, school number, and school telephone number already completed. Most providers have been pleased with this form because it saves them time formerly spent rewriting the same information monthly. The new form should reduce the number of encounter data forms that need to be returned to schools for corrections.

VI. Third Party Billing Revenue

A graph of third party billing revenues is attached as Exhibit I. For fiscal year 2006, the Office of Third Party Billing generated a total of \$8,448,866 in revenue including \$90,333 in school-based health center reimbursement. Exhibit J details the amount of school-based health center reimbursement generated by year.

VII. Incentive Programs

The Office of Third Party Billing has a strong incentive program in place in order to increase the potential reimbursement for services and to hold schools and offices accountable for the documentation of services.

One of the largest components of the incentive program is the return of a portion of the case management funds to each school. The principal, IEP chair, and case managers are given the opportunity to determine how the returned funds can be utilized to support, expand, and enhance special education and health-related services in schools. In order to ensure accountability with the memorandum of understanding between the MSDE and BCPS, all requests for funds through the incentive program must be approved by the principal, the Office of Third Party Billing, and the area assistant superintendents. A copy of the Third Party Billing Action Plan is attached as Exhibit K. Third party billing funds are allocated based upon the percentage of the case management encounter data submitted. This process ensures equity in the distribution of funds based upon the number of special education Medicaid-eligible students at each school. Individual schools have received from \$25 to \$25,000 annually.

The Certificate of Achievement is an additional incentive for schools. Commenced in 1996, the Office of Third Party Billing produces a Certificate of Achievement for each school that submits 95% or more of its potential case management encounter data. The awards are presented to principals. Many of these awards can be seen displayed in school lobbies and showcases. A chart delineating the number of schools that have received this award in the past nine years is attached as Exhibit L.

VIII. Accountability

A major reason for the success of the Third Party Billing Program is accountability. To assist schools and related service office heads who are accountable for the submission of encounter data forms, the Office of Third Party Billing sends accountability reports on a bimonthly basis. This report shows each case management encounter data form submitted, the procedure code, date of service, and provider name. The school-based staff can use this report as a receipt to ensure that all data were received and to determine what data have not been submitted. Typically, the dissemination of this information leads to a large increase in the encounter data submitted to the Office of Third Party Billing.

The Office of Third Party Billing also produces reports on encounter data forms for all related services office heads. This report allows the office head to monitor the staff at each school. In many instances, the submission of encounter data forms can be linked directly to the caseloads of providers. The use of real-time data as a monitoring tool is an important factor in holding staff accountable for documenting services rendered to special education Medicaid-eligible students.

IX. Interagency Medicaid Monitoring Team

The Interagency Medicaid Monitoring Team (IMMT) was created by the MSDE and the DHMH as a result of the audit report issued by the Office of the Inspector General (OIG) of the United States on the State of Maryland. One of the major findings in the report stated that the MSDE and DHMH lacked proper oversight of the Medicaid program in the schools. The mission of the team is to review records annually of each school system to

ensure compliance with the federal and state regulations. The IMMT has reviewed BCPS records twice. The Office of Third Party Billing has worked collaboratively with several offices to make changes to enhance the Third Party Billing Program and to ensure compliance.

For fiscal year 2006, the following changes were instituted for the Third Party Billing Program and school-based providers:

1. The Case Management Activity Detail Log has been revised for school-based providers to include their credentials. By detailing their credentials, providers who do not meet the minimum requirements to bill Medicaid should be eliminated from the process. A sample of the Case Management Activity Detail Log is attached as Exhibit M.
2. The Case Management Activity Detail Log has been placed on the Office of Third Party Billing website so that school-based staff can download the form and maintain the data electronically.
3. Logs used by speech/language pathologists, occupational therapists, and physical therapists has been edited to include the signature of the provider on each page of the log.

The offices of Health, Counseling, Social Work, and Psychological Services will be developing a standardized form to be used by providers of their respective disciplines. The form will serve the purpose of a log to document that a service was provided to the student.

The document will be required to meet the minimum billing standards as set forth by Medicaid.

X. Internal Monitoring

The Office of Third Party Billing has a very rigorous process for monitoring all encounter data that is received in the office. All encounter data forms are reviewed for errors, and erroneous forms are returned to providers for corrections. In addition, the computer database verifies the accuracy of the date of the service and verifies that the services are actually included in the IEP of the student.

Based upon the OIG audit, the MSDE has mandated that each local education agency set up a self-monitoring process and have it approved by the MSDE. The Office of Third Party Billing has worked collaboratively with the BCPS Office of Internal Audit and MSDE to develop a more comprehensive internal monitoring process.

The Office of Third Party Billing self-monitoring component is a collaborative effort with the Office of Internal Audit. Each year, the Office of Internal Audit determines the claims and students to be reviewed based upon findings in the IMMT report, as well as the previous internal monitoring report. By using this methodology, it is easy to see if process improvements are being made.

In the 2005-2006 school year, the IMMT visited BCPS on April 4, 2006. The BCPS team that participated in the review consisted of members from the Department of Teaching and Learning, the Department of Fiscal Services, the Department of Human Resources, the

Department of Planning and Support Operations, the Department of Student Support Services, and the Office of Internal Audit. The IMMT reviewed records for twenty (20) students that equated to 128 billable services. Most of the findings in the report were minor and will be addressed by the Office of Third Party Billing through training efforts in the upcoming school year.

XI. School-Based Health Center Billing

The school-based health centers are designed to be used to keep students who may have some health-related issues in school and functioning at a high level. The centers are typically used by students who may not receive health care due to a multitude of barriers, including the lack of health care coverage, parents without adequate transportation, as well as parents who may have to lose time from work in order to take the student to the doctor.

BCPS has been providing and billing for school-based health center services since 1995. BCPS bills private insurance companies and Medicaid annually for school-based health center services provided in the fourteen (14) sites. Exhibit N delineates the number of school-based health center visits by center during the 2005-2006 school year. Exhibit O details the funds generated by school-based health centers based upon the number of services provided to students. Since the billing process has been centralized, the revenue from the program has increased steadily with the exception of the 2005-2006 school year. The Office of Third Party Billing has determined that the decrease in reimbursement in that year can be attributed to insurance companies paying their bills after the close of the BCPS fiscal year.

XII. Medicaid Home and Community-based Autism Waiver Program

The Medicaid Home and Community-based Autism Waiver Program is a medical assistance program that was developed as a joint effort between the MSDE and DHMH in order to offer support at home and in the community to this extremely challenging population. Initially, this program offered services including day habilitation, intensive individual support services, respite care, environmental accessibility adaptations, family training, and residential habilitation. Eligibility for waiver services is determined by technical, financial, and medical criteria, and openings have been filled on a “first come, first served” basis. Originally begun with only 150 openings, the waiver program currently has over 900 participants statewide. There are no plans at this time for adding openings to the state cap. The openings only become available when a child reaches the age of 21, moves out of the state, or no longer meets eligibility requirements.

As of June 2006, there were 120 students participating in the waiver program. Many of the families of these students were able to receive services that were unavailable to them by any other means, improving their quality of life significantly. In other cases, parents were able to spend time doing homework with their non-disabled children while the student with autism worked with a technician at home on life skills. Many families have benefited from the behavioral support and family training that has been provided through the autism waiver. The children on the waiver have also experienced, in many cases, improved behavior and support with IEP goals because the home programs are working in tandem with school programs for the overall developmental improvement of these children.

Exhibit P details the autism waiver services provided by type during the 2005-2006 school year.

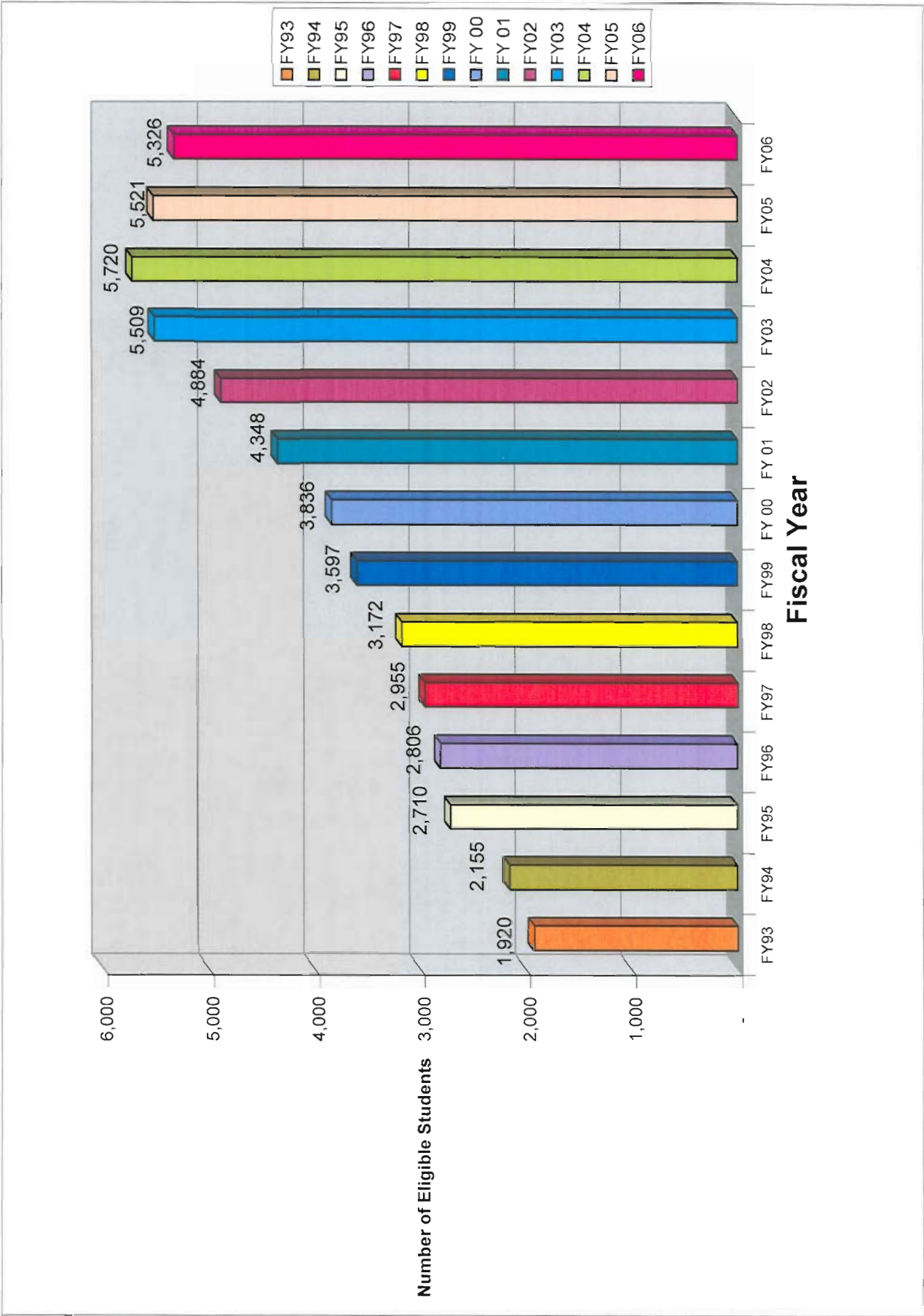
In March 2006, the DHMH conducted an on-site review of the Medicaid Home and Community-based Autism Waiver Program, and representatives from the Inspection of Care (IOC) team selected 10 BCPS students as part of the statewide review. The IOC team reviews files, interviews parents, and visits students in their homes, and residential and school programs. The exit interview and subsequent information revealed that BCPS is doing “an excellent job with large participant load,” that all records were “present, in good order, well purged, with all essentials present,” and that questionable issues are primarily not at the local level, but are being addressed by the MSDE. Overall, the IOC team had praise for BCPS’ program. Suggestions made are being implemented.

The Office of Third Party Billing has been able to demonstrate that revenue can be generated through the autism waiver due to the manner in which it has been managed. In September 2004, BCPS was informed of a decision by the MSDE to not allow billing for day habilitation. This decision has decreased revenues. It was determined that billing for this service was in direct violation of IDEA regulations, and the billing was discontinued.

EXHIBITS

Students Eligible for the Third Party Billing Program by Fiscal Year

Exhibit A



BALTIMORE COUNTY PUBLIC SCHOOLS

Joe A. Hairston, Superintendent

6901 Charles Street Towson, Maryland 21204-3711

Dear Parent/Guardian:

The Baltimore County Public Schools are pleased to provide special education services to your child. In order to maintain the highest quality of special education services, we are requesting your assistance. The Baltimore County Public Schools are able to bill Medical Assistance for some services that may be provided to your child. There is no cost to your family. This will not affect or change your Medical Assistance benefits, and will help the Baltimore County Public Schools to obtain funds for children with special needs.

EVEN IF YOUR CHILD DOES NOT HAVE MEDICAL ASSISTANCE, PLEASE COMPLETE AND RETURN THIS FORM TO YOUR CHILD'S SCHOOL. ALL INFORMATION WILL REMAIN CONFIDENTIAL AND WILL BE USED ONLY TO BILL MEDICAL ASSISTANCE FOR SERVICES PROVIDED TO YOUR CHILD.

We appreciate your cooperation. If you have any questions, please feel free to contact the **Office of Third Party Billing at 410-887-4130** or your child's school.

Sincerely,

Principal

*All student and Case Manager information must be completed by the school.

Student Name: _____

Student Identification Number or Social Security number: _____

Student Date of Birth: _____

School Name: _____

STUDENT MEDICAL ASSISTANCE NUMBER** (MA#)

____ - ____ - ____ - ____ - ____ - ____

**Depending on the Managed Care Organization (MCO) the Medical Assistance number can be located on this card in the following category:

Amerigroup- Medicaid #Jai Medical Systems- Member ID#United Health Care- M/A ID#Diamond Plan- State ID#Maryland Physicians Care- MA#Helix Family Choice- MA ID#Priority Partners- Recipient ID#

I give permission for my child to receive Case Management services, and I approve of the Case Manager(s) for my child.

Case Manager_____
2nd Alternate Case Manager_____
Alternate Case Manager_____
Signature of Parent/Guardian_____
Date

⇒ Please return this form to your child's school tomorrow.

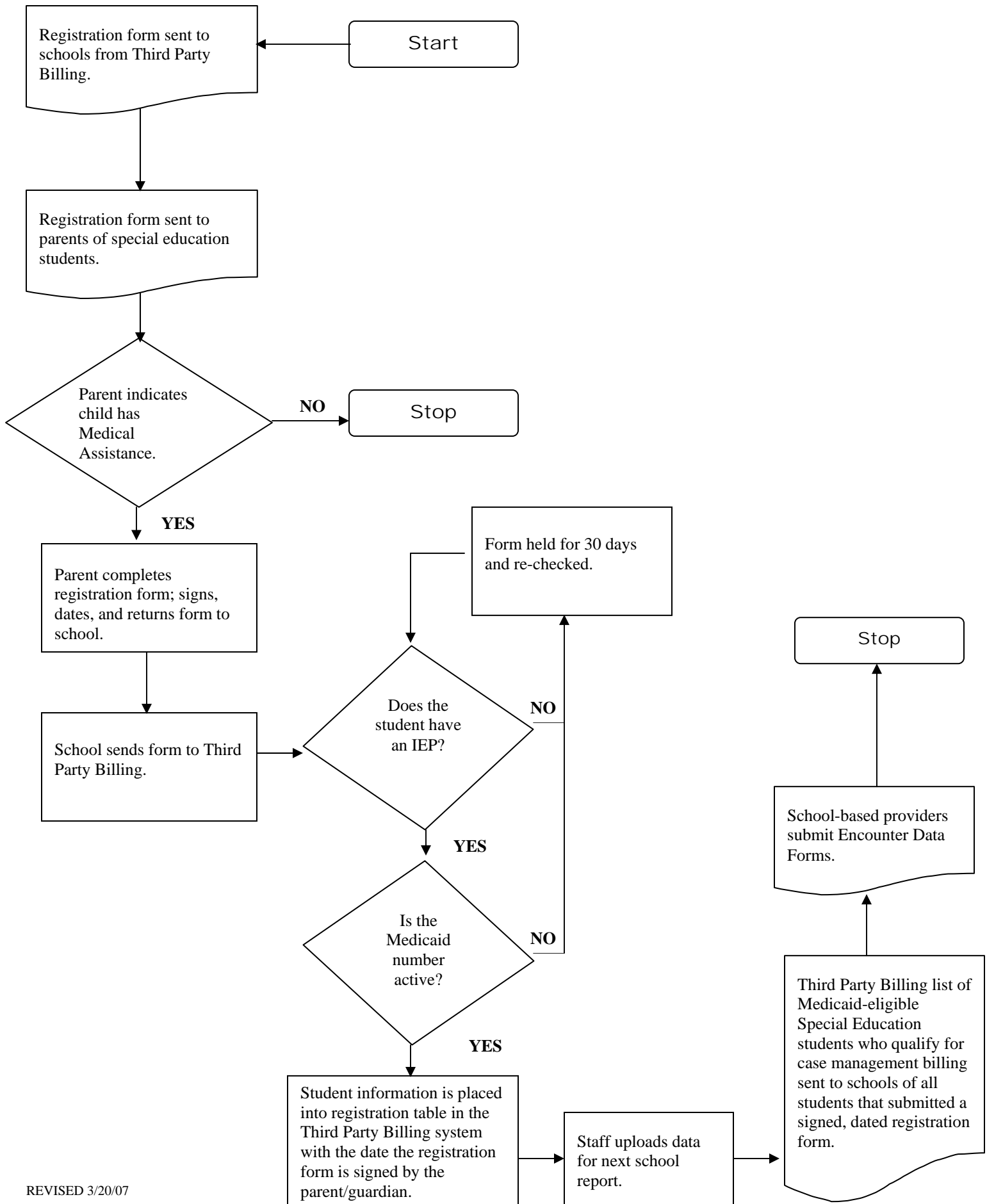
*School staff: Please forward all completed forms to the *Office of Third Party Billing* in Timonium.

For the Office of Third Party Billing use only:

ACTIVE IEP: _____
Date: _____Valid MA# ☐In-Active MA# ☐Invalid MA# ☐Invalid SS# ☐State Funded ☐Invalid Name Code ☐NO/ENDED IEP: _____ / _____
Date Date

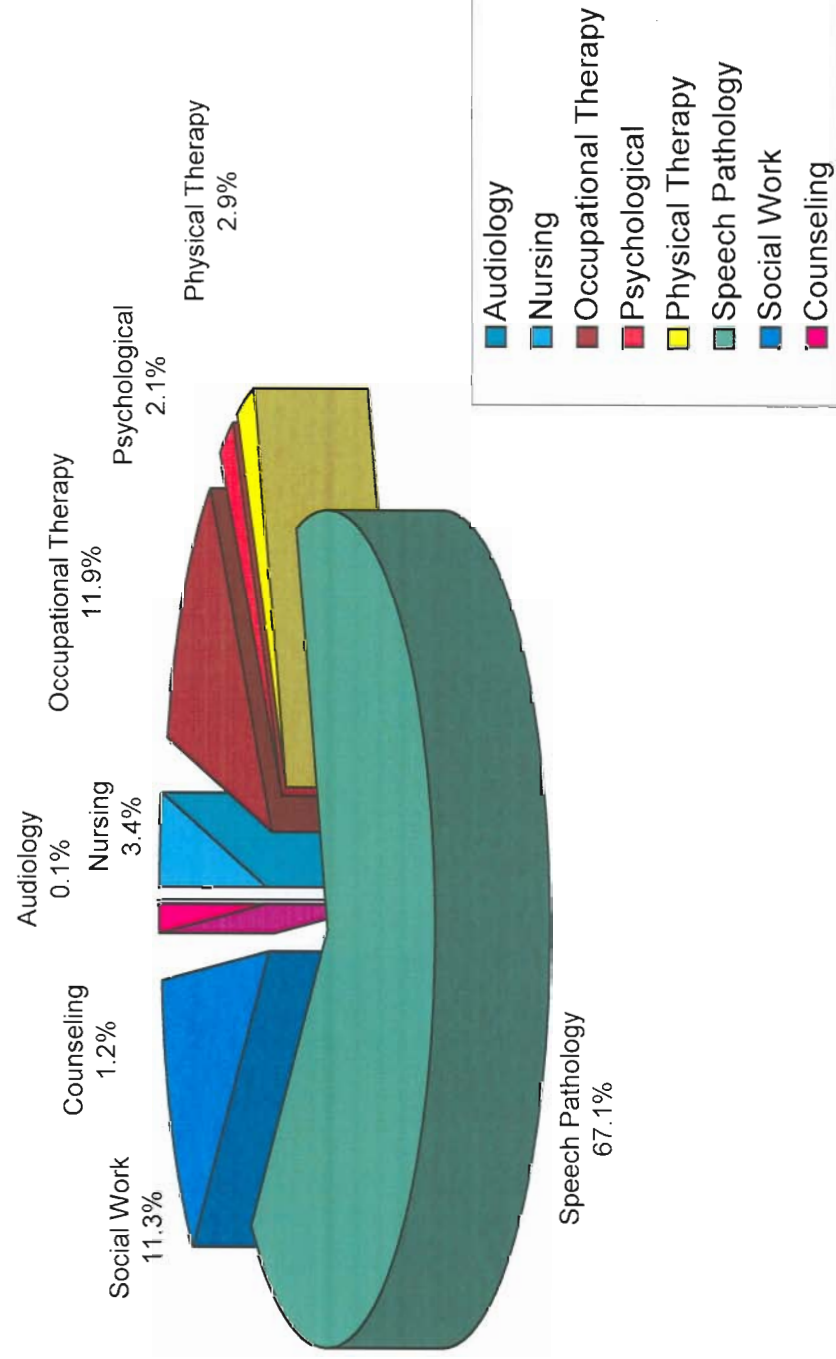
**Process For Baltimore County Public Schools
Third Party Billing Registration Form and Parental Consent
For Case Management Billing**

Exhibit C



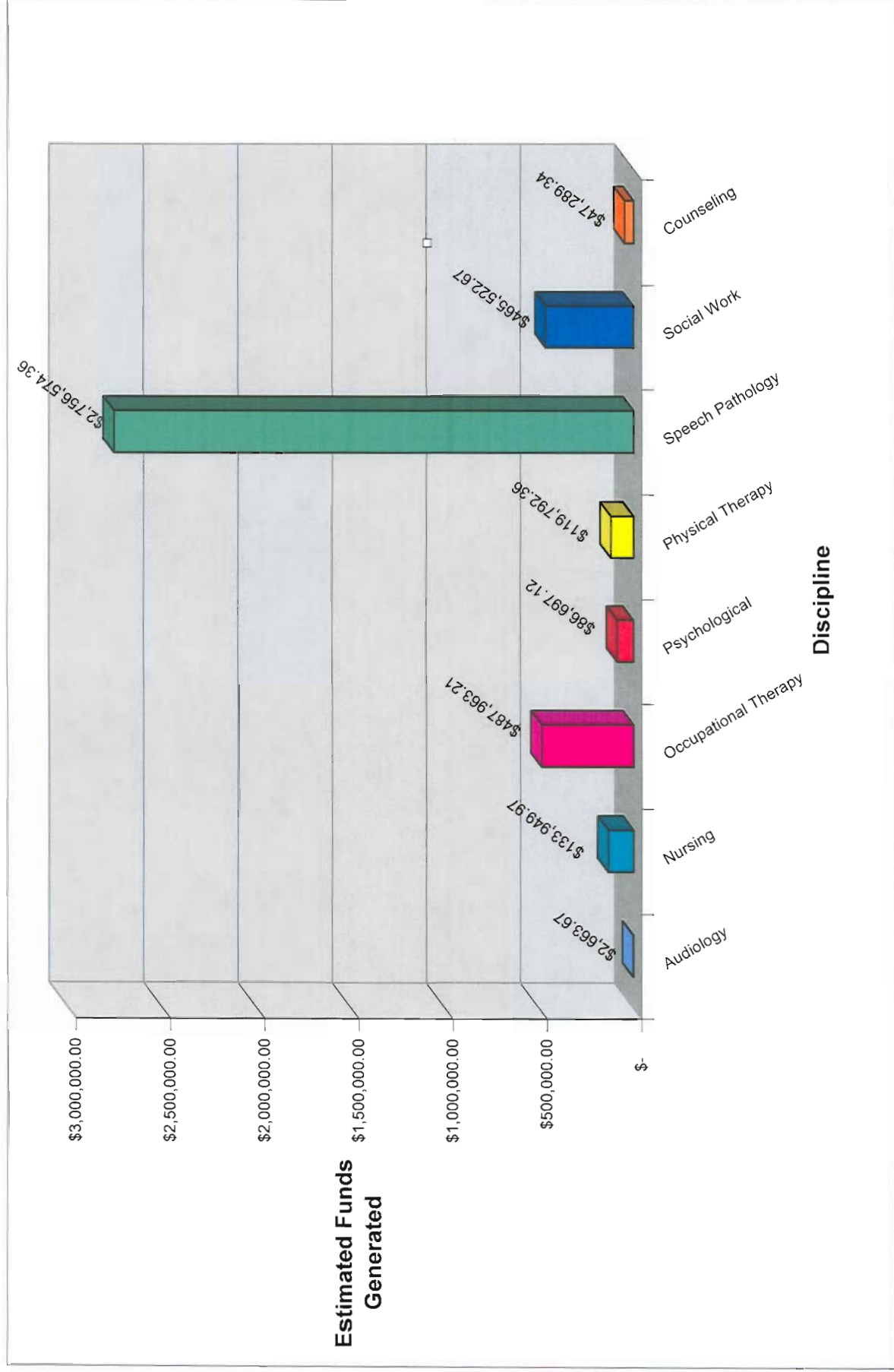
Percentage of Related Service Encounter Data Forms Received by Discipline 2005-2006 School Year

Exhibit D



Estimated Third Party Billing Reimbursement by Discipline FY 06, based upon the percentage of encounter data forms submitted

Exhibit E



BALTIMORE COUNTY PUBLIC SCHOOLS
THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS
2005-2006 School Year

Exhibit F

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Arbutus Elementary	Brent Grabill	Assistant Principal	5	October 18,2005
Arbutus Middle	Meshia Sutton	IEP Chair	11	August 26, 2005
Baltimore Highlands Elementary	Rosemarie D. Kincannon	Principal	5	November 8,2005
Battle Grove Elementary	Sabina Offley	Assistant Principal	8	September 1,2005
Bedford Elementary	Stephen Coco	Assistant Principal	5	November 1,2205
Berkshire Elementary	Sharon Marquette	Assistant Principal	6	October 6,2005
Campfield Eearly Childhood	Deabra Feaster	Principal	12	October 25,2005
Carney Elementary	Kimberly Mark	Acting IEP Chairperson	7	September 1,2005
Catonsville Alternative Center	Deborah Bernfeld	Assistant to the Principal	2	November 1,2005
Catonsville Elementary	Peggy De Crispino	Assistant Principal	6	September 9,2005
Catonsville Middle	Carol O'Brien	Special Education Department Chairperson	7	November 21,2005
Cedarmere Elementary	Teresa Filbert	Principal	4	Septermber 14,2005
Chapel Hill Elementary	Jennifer Mullenax	Assistant Principal	3	October 17,2005
Charlesmont Elementary	Stephen Bender	Assistant Principal	10	September 19,2005
Chase Elementary	Patricia L. Blair	Assistant Principal	11	October 26,2005
Cheasapeake High	Michele Patras	Special Education Department Chairperson	10	September 22,2005
Chesapeake Terrace Elementary	Diane Shupe	Assistant Principal	14	October 19,2205
Colgate Elementary	Joyce Cummings	Assistant Principal	3	September 22,2005

BALTIMORE COUNTY PUBLIC SCHOOLS
THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS
2005-2006 School Year

Exhibit F

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Deep Creek Elementary	Sharon Mason	Assistant Principal	4	November 2,2005
Deep Creek Middle	Jeffrey Matthews	Special Education Department Chairperson	12	November 8,2295
Deer Park Elementary School	Theresia Lafferman	Assistant Principal	6	September 9,2005
Dulaney High	Barbara Kelley	Special Education Department Chair	11	October 6,2005
Dundalk High	Linda Quick	Special Education Department Chair	9	September 22,2005
Dundalk Middle	Eric Depkin	IEP Chairperson	6	September 6,2005
Eastwood	Barbara Lewis	Assistant Principal	7	September 22,2005
Edmondson Heights Elementary	Barbara Davis	Assistant Principal	4	October 14,2005
Fifth District Elementary	Paul Balsamo	Assistant Principal	3	October 28,2005
Fort Garrison Elementary	Arlene Bekman	Assistant Principal	6	August 24,2005
Fullerton Elementary	Kim Munchel	Special Education Teacher	3	November 28,2005
General John Stricker Middle	Barbara Victor	IEP Chairperson	14	October 6,2005
Gunpowder Elementary	Christine Smith	Principal	7	August 24,2005
Halstead Academy	Pamela Peters	Assistant Principal	6	October 6,2005
Hebbville Elementary	Michelle Snell	Special Educaiton Teacher	10	September 6,2005
Hernwood Elementary	Steve Buettner	Principal	7	September 14,2005
Holabird Middle	Marie Gagne-Stacey	IEP Chairperson	8	November 28,2005
Johnnycake Elementary	Tiffany Livingstone	Assistant Principal	4	October 3,2005

BALTIMORE COUNTY PUBLIC SCHOOLS
THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS
2005-2006 School Year

Exhibit F

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Kingsville Elementary	Lois Gorman	Assistant Principal	5	October 6,2005
Lansdowne High	Sharon Loiacono	IEP Chairperson	8	October 11,2005
Lansdowne Middle	Kara Boehl	IEP Chair	9	August 29,2005
Logan Elementary	Sally Barbieri	Assistant Principal	9	September 2,2005
Lutherville Laboratory	Stephanie Fanshaw	Assistant Principal	7	November 10,2005
Maiden Choice School	Yanina Giller	Assistant Principal	23	August 25,2005
Mars Estates Elementary	Linda Chapin	Principal	11	August 31,2005
McCormick Elementary	Kevin Lindsey	Principal	3	October 10,2005
Middleborough Elementary	Douglas Elmendorf	Assistant Principal	9	September 16,2005
Middle River Middle	David Maimone	IEP Chairperson	12	October 10,2005
Middlesex Elementary	Heidi Miller	Assistant Principal	8	October 28,2005
Milbrook Elemetnary School	Brian Cooper	Assistant Principal	4	November 2,2005
Milfod Mill Elemetnary	Renee Bienenstock	IEP Chair	6	August 29,2005
Net Town Elementary	Christina Connelly	Assistant Principal	5	Septermber 2,2005
Norwood Elementary	Nancy Fox	Assistant Principal	5	October 7, 2005
Oakleigh Elementary	Randy Quinn	Assistant Principal	2	November 28,2005
Oliver Beach Elementary	Charlene Behnke	Assistant Principal	6	October 10,2005
Orems Elementary	Julia Olmedo	Assistant Principal	6	October 6,2005

BALTIMORE COUNTY PUBLIC SCHOOLS
THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS
2005-2006 School Year

Exhibit F

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Overlea High	Mary Lou McHugh	IEP Chair	11	August 29,2205
Owings Mills Elementary	Jennifer Bischer	Assistant Principal	4	October 3,2005
Padonia International Elementary	Kate Wolf	Assistant Principal	6	October 6,2005
Parkville High	Allison Jefferson	Special Educaiton Department Chairperson	12	November 21,2005
Parkville Middle School	Donna Seegar-Sedmak	IEP Chairperson	9	October 10,2005
Patapsco High	Wanda Keller	Special Education Department Chairperson	9	November 9,2005
Perry Hall High	Michael Bacon	Special Education Dept. Chair	16	October 24,2005
Pikesville High	Richard Wasserman	Special Education Department Chair	10	November 9,2005
Pikesville Middle	Kathleen Pelletier	Special Educaiton Teacher		September 9,2005
Pinewood Elemetnary	Cheryl Jones	Assistant Principal	10	December 6,2005
Pleasant Plains Elementary	Jennifer Bagnall	Assistant Principal	6	September 13,2005
Randallstown High	Requel Joyner	IEP Chairperson	6	October 11,2005
Reisterstown Elementary	Leslie Dunn	Assistant Principal	8	September 9,2005
Relay Elementary	Brian Williams	Assistant Principal	5	September 2,2005
Riderwood Elementary	Patricia Muphy	Assistant Principal	6	October 17,2005
Ridge Ruxton	Janet Mosso	Assistant Principal	22	October 17,2005
Riverview Elementary	Anna Marie Costello	Assistant Principal	11	October 18,2005
Sandy Plains Elementary	Jason Feiler	Assistant Principal	7	November 1,2005

BALTIMORE COUNTY PUBLIC SCHOOLS
THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS
2005-2006 School Year

Exhibit F

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Scotts Branch Elementary	Alison Donlon	Assistant Principal	5	September 14,2005
Seven Oaks Elementary	roseanne Reimer	Assistant Principal	7	October 26,2005
Seventh District Elementary	Hope Baier	Assistant Principal	6	October 3,2005
Shady Spring Elementary	Nancy Klein	Assistant Principal	4	October 21,2005
Southwest Academy	Robyn Washington	Special Education Teacher	18	September 13,2005
Sparrows Point High	Alvina Danna	IEP Chairperson	5	September 19,2005
Sparrows Point Middle	David Lige	Assistant Principal	6	September 22,2005
Stemmers Run Middle	Judith Grewell	IEP Chair	13	August 29,2005
Stoneleigh Elementary	Melissa Allen	Assistant Principal	5	August 30,2005
Summit Park Elementary	Sharonda Gregory	Assistant Principal	8	October 19,2005
Timber Grove Elementary	Barbara Roberts	Assistant Principal	7	September 2,2005
Victory Villa Elementary	Robin Gladstone	Speech/Language Pathologist	5	October 3,2005
White Oak	Regina Martini	Principal	14	October 6,2005
Winand Elementary	Robin Rupprecht	Assistant Principal	9	September 13,2005
Winfield Elementary	Sharon Attaway	Principal	6	October 19,2005
Woodbridge Elementary	David Wunder	Assistant Principal	6	September 19,2005
Woodholme Elementary	Nashae Bennett	Assistant Principal	5	August 8,2005
Woodlawn High	Nettie Jackson	IEP Chair	13	September 7,2005

BALTIMORE COUNTY PUBLIC SCHOOLS
THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS
2005-2006 School Year

Exhibit F

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Woodlawn Middle	Alice Jones	IEP Chairperson	15	August 8,2005
Woodlawn Middle	Alice Jones	IEP Chairperson	5	November 1,2005
Woodmoor Elementary	Andrea Levine	Special Educaiton Teacher	4	October 27,2005

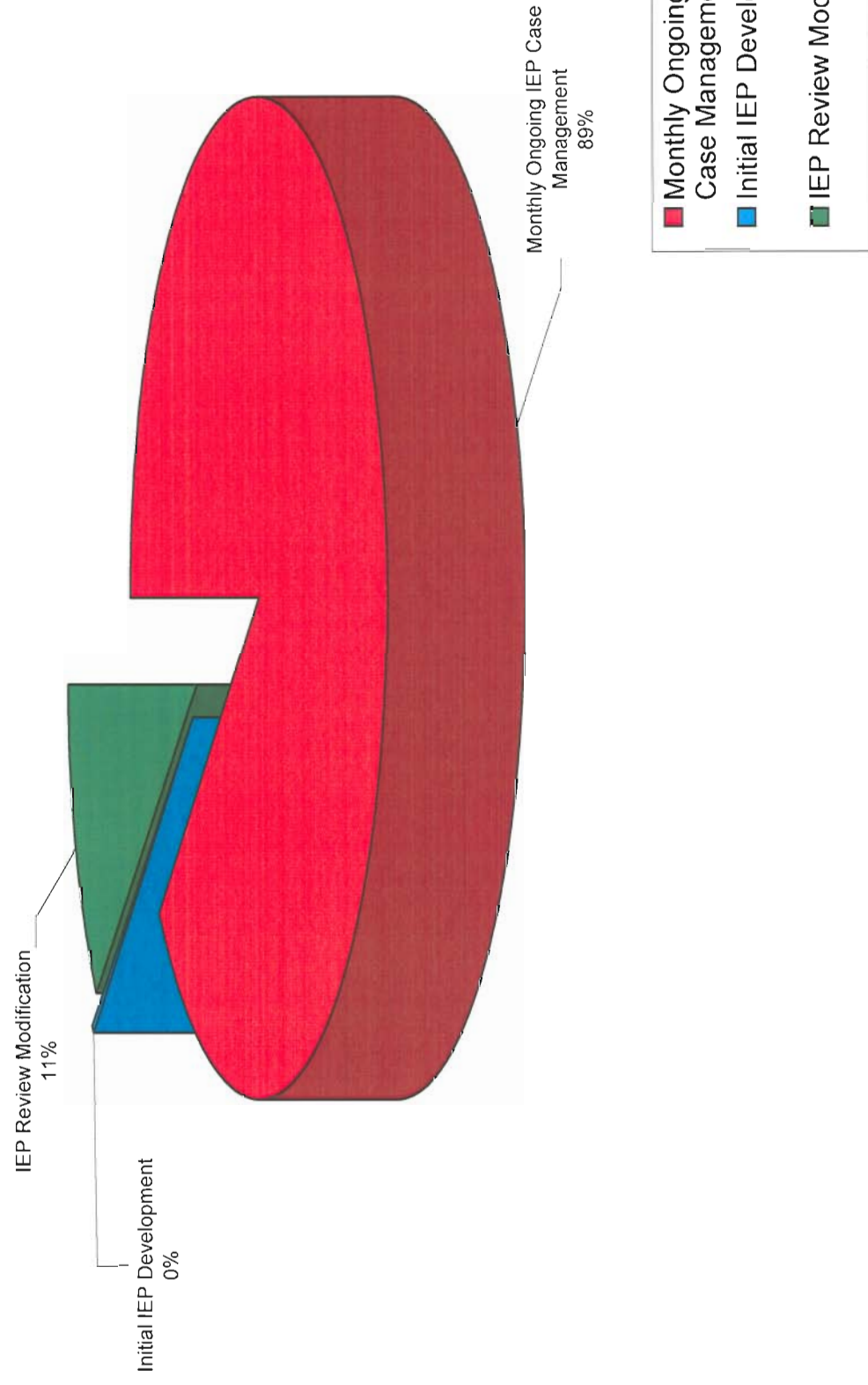
BALTIMORE COUNTY PUBLIC SCHOOLS
THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS
2005-2006 School Year

Exhibit F

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
		Total Staff Trained	718	

Case Management Services Provided to Students by Type 2005-2006 School Year

Exhibit G



BALTIMORE COUNTY PUBLIC SCHOOLS

THIRD PARTY BILLING

School Based Training Session Evaluation

SUMMARY

2005-2006

	YES	NO
1) Was this training session beneficial to you? If not, how could it be improved?	441	4
2) Has the training session clarified your Third Party Billing responsibilities? If not, what is still confusing?	439	6
3) Have you gained additional knowledge about Third Party Billing as a result of this session?	436	9
4) Was the presenter knowledgeable about the subject?	445	0
5) Did the presenter answer all of your questions? If not, please list your questions.	429	5
6) Do you feel that the Case Management Training Manual is user friendly and will serve as a resource to you? If not, how can it be improved?	440	0

Overall, how would you rate this training session? (*please check one of the boxes*)

Excellent **380** Good **61** Average **7** No Rating **4** Total surveys **445**

COMMENTS & SUGGESTIONS (SUMMARY):

- *Mr. Tyler's follow-up letter provided answers to teachers' questions. (2)*
- *This session cleared up my understanding of my role as a case manager and which codes to use. (3)*
- *Charles is an amazing person with a wealth of knowledge on this topic and the ability to communicate that knowledge.*
- *Charles Tyler need to deem "I can see clearly now," as his theme song. He continually presents third party billing information in a very easy to understand manner. He is an asset to Baltimore County Public Schools!!*
- *Your office is so helpful. The training was great! Thank you so much! (2)*
- *Thank you for paying our ASHA certification dues.*
- *Mr. Tyler presented his information in a clear, focused and concise manner. While I have facilitated third party billing for several years, it is always important to have a yearly personal site based update. This update was particularly useful due to the many changes to the third party billing mandates and the team at our school. Thank you so much! (5)*

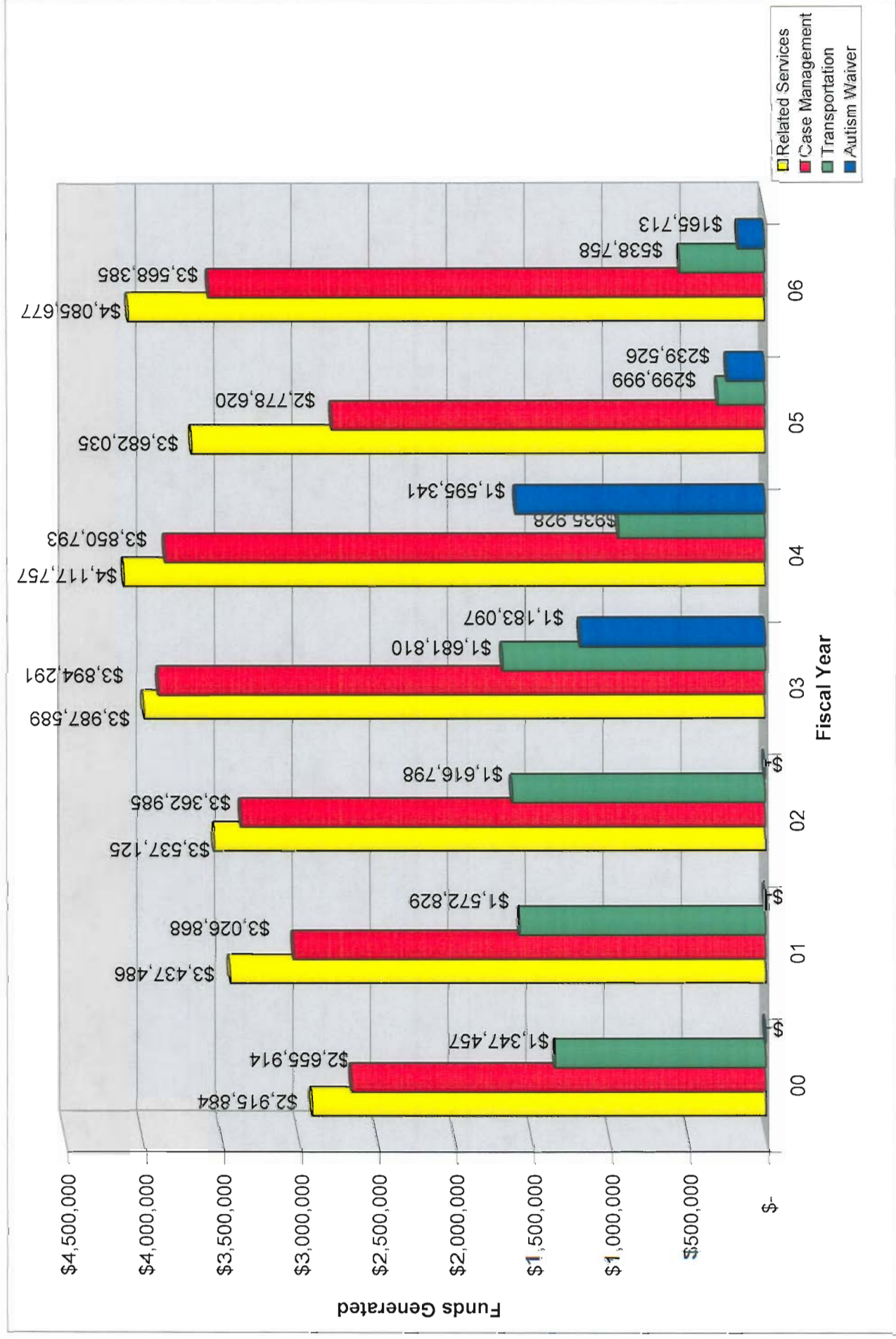
- *Thank you so much for such a wonderful training! Charles was an excellent instructor and it was well worth it for me to attend. (4)*
- *Charles is always excellent! (5)*
- *We love the pens (25)*
- *As always Mr. Tyler makes the session informative. The manual should be given prior to the school year. (10)*
- *I recommend **yearly** refresher and discussion of any changes. The manuals are very helpful resources.*
- *Well done! (20)*
- *Very thorough and well presented. All of our questions were addressed. (6)*
- *The training was beneficial. I have never had to participate with third party billing so the information provided me with an understanding of my responsibility. Thank you for the training. You are extremely knowledgeable and I will be sure to call with any questions. (8)*
- *I really enjoyed the session. Mr. Tyler was very informative and personable. (7)*
- *Charles is so knowledgeable and clear with his explanations that all new assistant principals would benefit from his explanation at a group of new assistant principals training session during the summer. This would save him from all the running as well.*
- *Charles Tyler's presentation was so helpful. He explained case management responsibilities in great detail, referring us to appropriate forms and pages in the manual. He patiently answered our questions and gave explanations based on his experience with the State and Federal government levels. (2)*
- *As a new CFY, I had no idea how to handle third party billing. Thanks to Charles, now I have a clear understanding.*
- *I love Mr. Tyler's presentations! He has a great sense of humor and makes a late day meeting tolerable. He is also very clear and concise in his explanations. (3)*
- *This was a very beneficial training session- especially the information regarding billing hours. The manual is very clear and user friendly, especially with the sample sheets. (3)*
- *As a new teacher the manual is proving to be a great resource! (5)*
- *The monthly newsletters are a great resource!*
- *The training provided some clarification with the "Case Management Activity Detail Logs" we have to complete. Charles also reiterated the importance of completing the detail logs. (5)*
- *We appreciated the scheduling flexibility so this could be accomplished on a professional day.*
- *The "sample" notes were very helpful!*
- *The trainer was very knowledgeable, as if he wrote the manual himself! (2)*
- *Thanks Charles, as always I enjoyed hearing your third party billing updates. (3)*
- *Charles was very knowledgeable, informative, and helpful!(83)*
- *We reviewed information about the audits. This helped clear up many questions of **why** we do what do.*
- *Thank you for including printable encounter data forms and activity detail logs on your website!! (5)*
- *More paperwork is not the answer. You will lose good teachers because we are tired of doing the work for no compensation or appreciation.*
- *Charles is awesome! (1)*
- *The manual is very comprehensive, straight forward, user friendly and easy to follow. (8)*
- *Charles clarifies and answers all of my questions.(5)*
- *Mr. Charles Tyler and Ms. Kay Crofoot seem to always be available through the school year to clarify information and answer questions. They have both been friendly, kind, knowledgeable and approachable.*

- *It was nice to learn we can e-mail parents as a contact. Charles explained in depth the responsibilities of e-mailing as a contact.(3)*
- *This was one of our most useful staff development sessions of the year!*
- *I already know a lot of the information. Maybe you could hold a separate session for new employees who need to learn the billing requirements from scratch and another session for “seasoned” teachers who already know third party and just need to learn the changes.*
- *Charles did a wonderful job educating our department. We appreciate his assistance.(3)*
- *Charles clarified changes and problems we were having last year.*
- *The forms we complete (encounter data forms) were changed. We were not notified and had to redo all of September forms and resubmit.*
- *Thank you! (18)*
- *Chocolate is preferred over life savers!*
- *Charles is wonderful. He is patient with answering our questions and explaining his position. We would really like to get 100% this year. If we have problems, we know we can rely on you and your staff.*
- *Very nice!!! We just need time allotted to do it!(2)*
- *It is good to know the forms are also translated in Spanish!*
- *Thanks Charles! (4)*
- *It is so nice to be able to sit down with someone so knowledgeable and have questions answered immediately! Reference was made to the training manual which was also very helpful! (9)*
- *We couldn't get a better presenter!*
- *It is always a pleasure to have you in our school - not to mention informative! My third party pen made the visit complete! (6)*
- *Please send cookies with Mr. Tyler – not hard candies.*
- *Mr. Tyler knows the material. He “breathes” the material! (2)*
- *Do we need to be re-trained every year? I have been through this session about three times?*
- *Charles makes a very stressful task for the teachers very doable.*
- *Mr. Tyler always personalizes the sessions by referring to each member by name. He was able to clarify how I should handle session provided by my graduate intern.*
- *Charles was excellent! I feel much more confident that I am filing third party forms out correctly. The meeting made me feel like our department was communicating and working as a team.*
- *Charles was very thorough about all the information whether it was now or remained the same.*
- *Mr. Tyler is personable and professional. Thank you for your time.*
- *The session clearly presented the changes in the procedures and the updated forms. The step-by-step “how to” was very helpful for me. The manual will serve as a reference when questions arise. It will be easier to use since the presenter referred to pages during the presentation. The confusion is in selecting the appropriate code.*
- *Any changes in the system or revisions were presented clearly. (3)*
- *Mr. Tyler did an excellent job with keeping the training on task.*
- *This session helped me to understand the differences between the way we did it in the city and how it is suppose to be done. The case management training manual is helpful for forms and valued procedures.*
- *Charles always does an excellent job and always exhibits a positive attitude. In addition, he has a phenomenal memory.*
- *Being new, I would have liked to go just a little slower. However, I'm sure it was more than sufficient for the veteran teachers.*

- *Charles explained and clarified procedures and the reasoning behind certain procedures and policies.*
- *I especially like the model case management encounter data form and the question and answer format.*
- *When you have done this year after year, you only need the changes highlighted. The manual is thorough. The new teachers need “training.” I felt it should be optional for veterans – perhaps they could receive a “refresher instead?”*
- *Our training session was held later in the school year. It would be helpful to have this information earlier in the school year.*
- *Changes to the forms were presented; there was greater clarification given re: ink color (signatures) and certification.*
- *I would like on-line training examples as a follow-up covering the pertinent point of training. Example: it would be helpful especially for the third party billing Case Management Activity Detail Log.*
- *Charles makes the sessions tolerable and points out some needed additional information.*
- *Thanks for keeping us updated!*
- *I thought there would be “new” information from last school year. I felt there wasn’t anything new but it was helpful anyway.*
- *There is too much paperwork!*

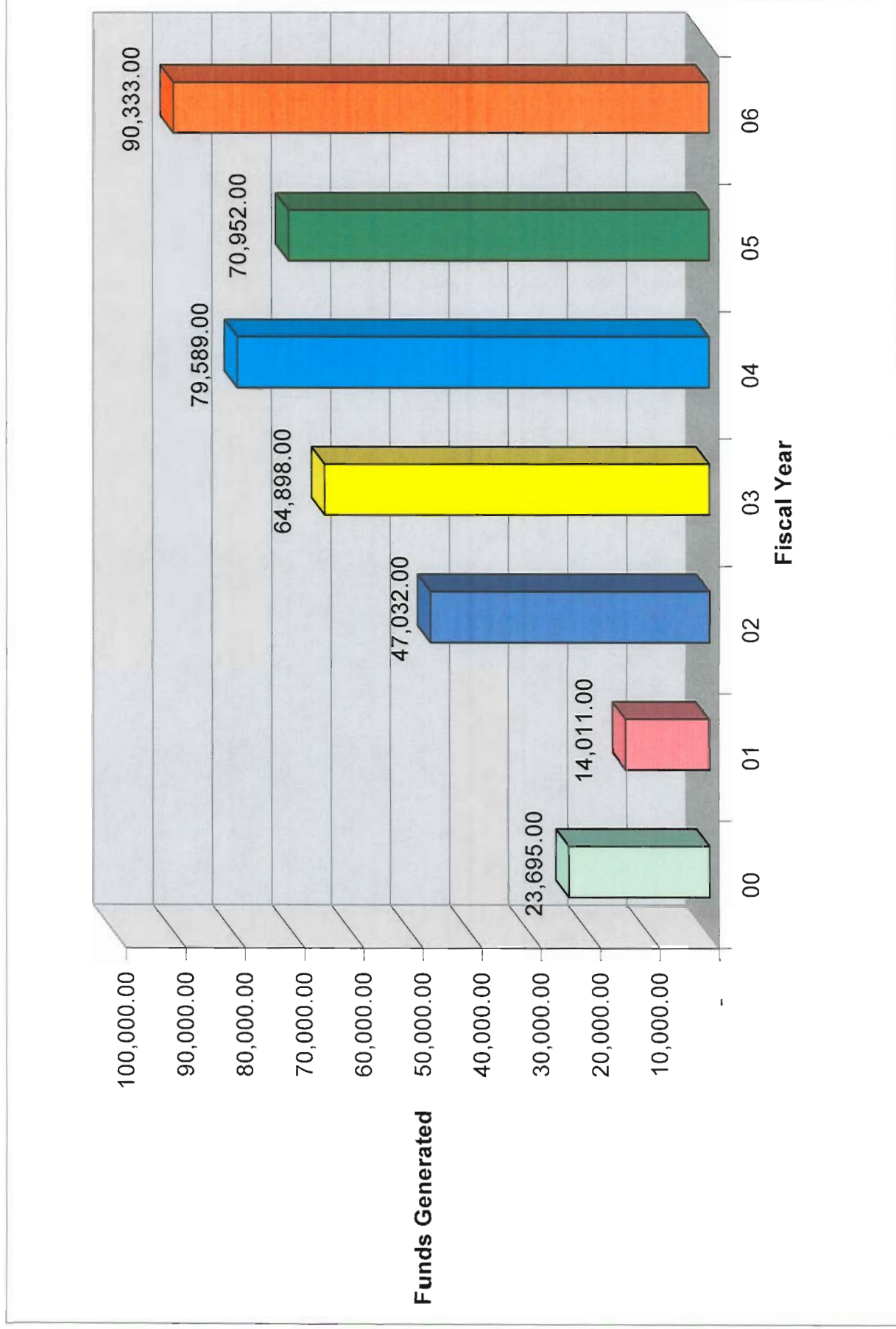
Funds Generated by Program by Fiscal Year

Exhibit I



School-Based Health Center Reimbursement

Exhibit J



Billing of these services prior to the 1999-2000 school year was not consistent
Centralized billing process began in the 2000-2001 school year

Action Plan (For Computer Use)
For Use of Third Party Billing Case Management Funds

School Name:	
---------------------	--

Salary Amount Requested:	\$0.00
FICA 7.65%	0.00
Workers Comp. 0.40%	0.00
Total Salary (including FICA & WC) Requested:	0.00

Non-Salary Items Requested:	
Supplies and Materials Amount:	0.00
Staff Development Amount:	0.00
Equipment Amount:	0.00
Field Trips/Transportation	0.00
Total Non-Salary Items Requested:	0.00

Total Amount Requested	\$0.00
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Provide the following:

1. Justification for requested funding by category and explanation of how funding will enhance special education and/or health related services. 7 typed lines allowed below. Use a separate sheet of paper for additional information.

2. Performance goal, indicator, and strategy number(s) indicating how this request supports the Superintendent's *Blueprint for Progress*.

Principal's Name:	
-------------------	--

Principal's Signature:	
	Date

Third Party Billing Signature:	
	Date

Area Asst. Superintendent's Signature:	
	Date

Number of Schools Receiving the Third Party Billing Certificate of Achievement

Exhibit L

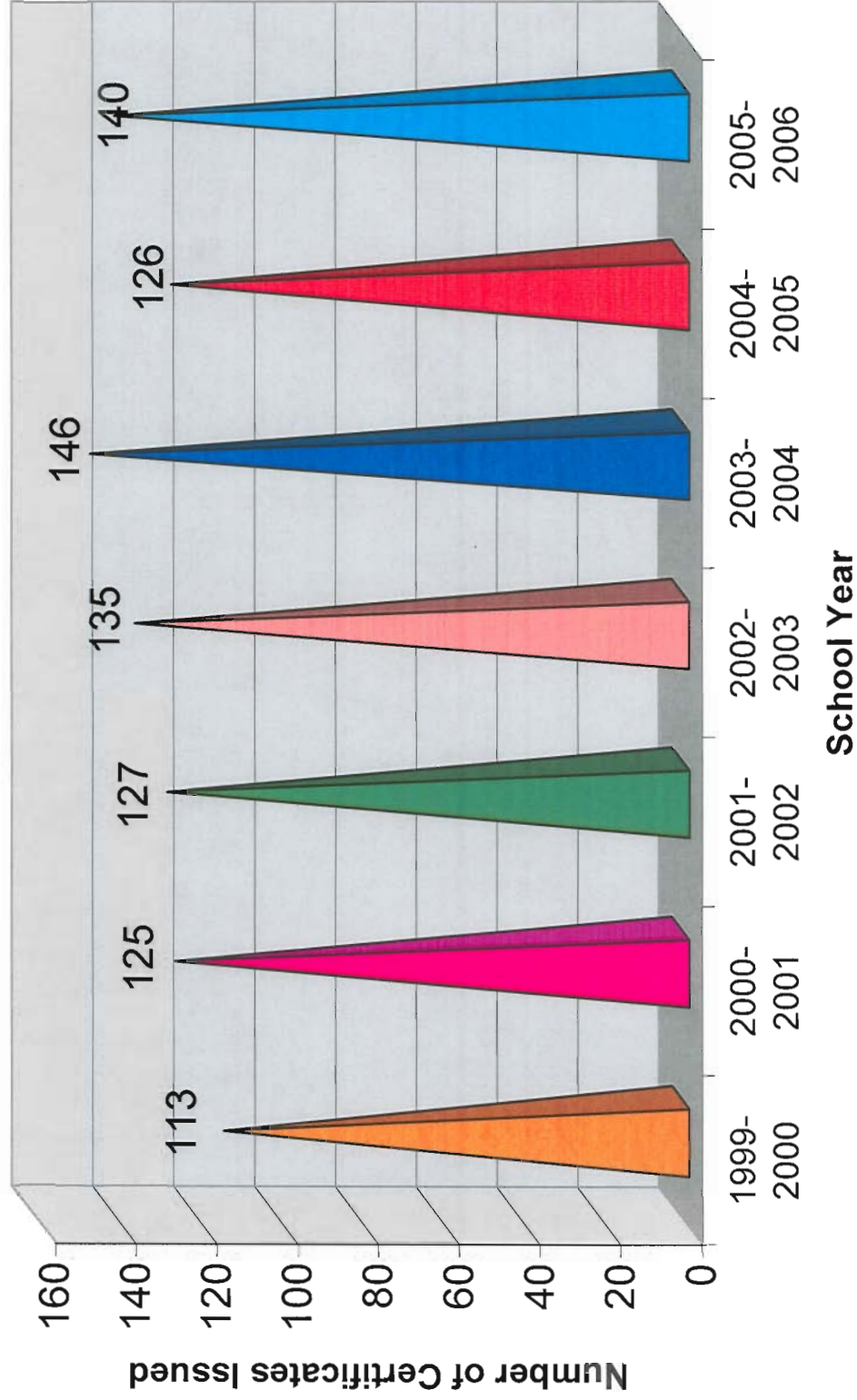


Exhibit M

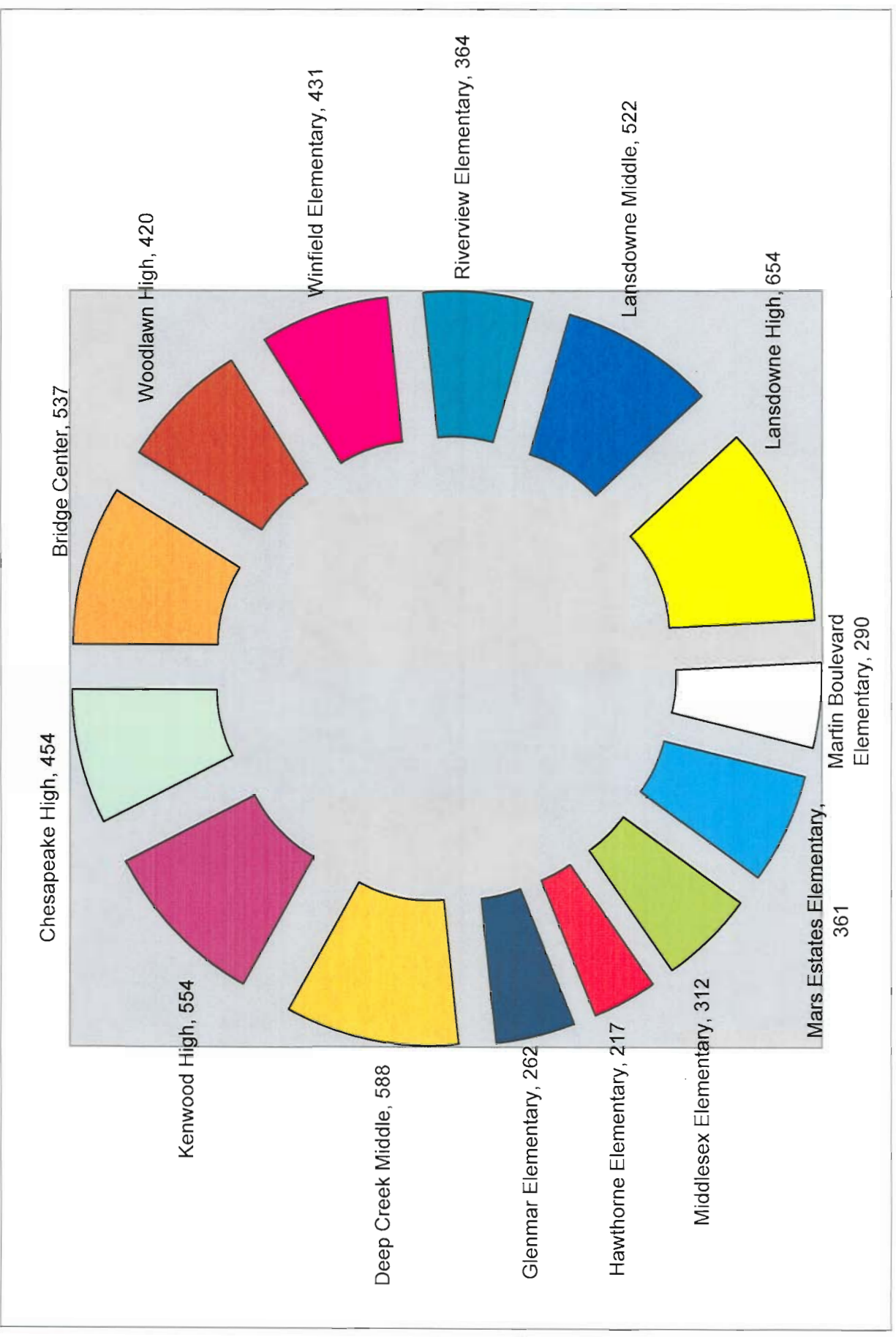
REVISÉ UP

- A. Meeting with child regarding progress.
- B. Written note sent home to parent/guardian regarding child's progress.
- C. Telephone call to parent/guardian regarding child's progress.
- D. Email contact to parent/guardian regarding child's progress.
- E. Consulted with team members-progress/follow-up note sent home with child to parent/guardian.
- F. Meeting held with parent/guardian with child present regarding progress.
- G. Other: This statement must indicate the following: parent/guardian contacted, nature of contact, and any follow-up action. The case manager must be the person making the contact.

PLACE IN STUDENT'S PERMANENT RECORD AT THE CLOSE OF THE SCHOOL YEAR,
OR WHEN THE STUDENT TRANSFERS TO ANOTHER BCPS SCHOOL

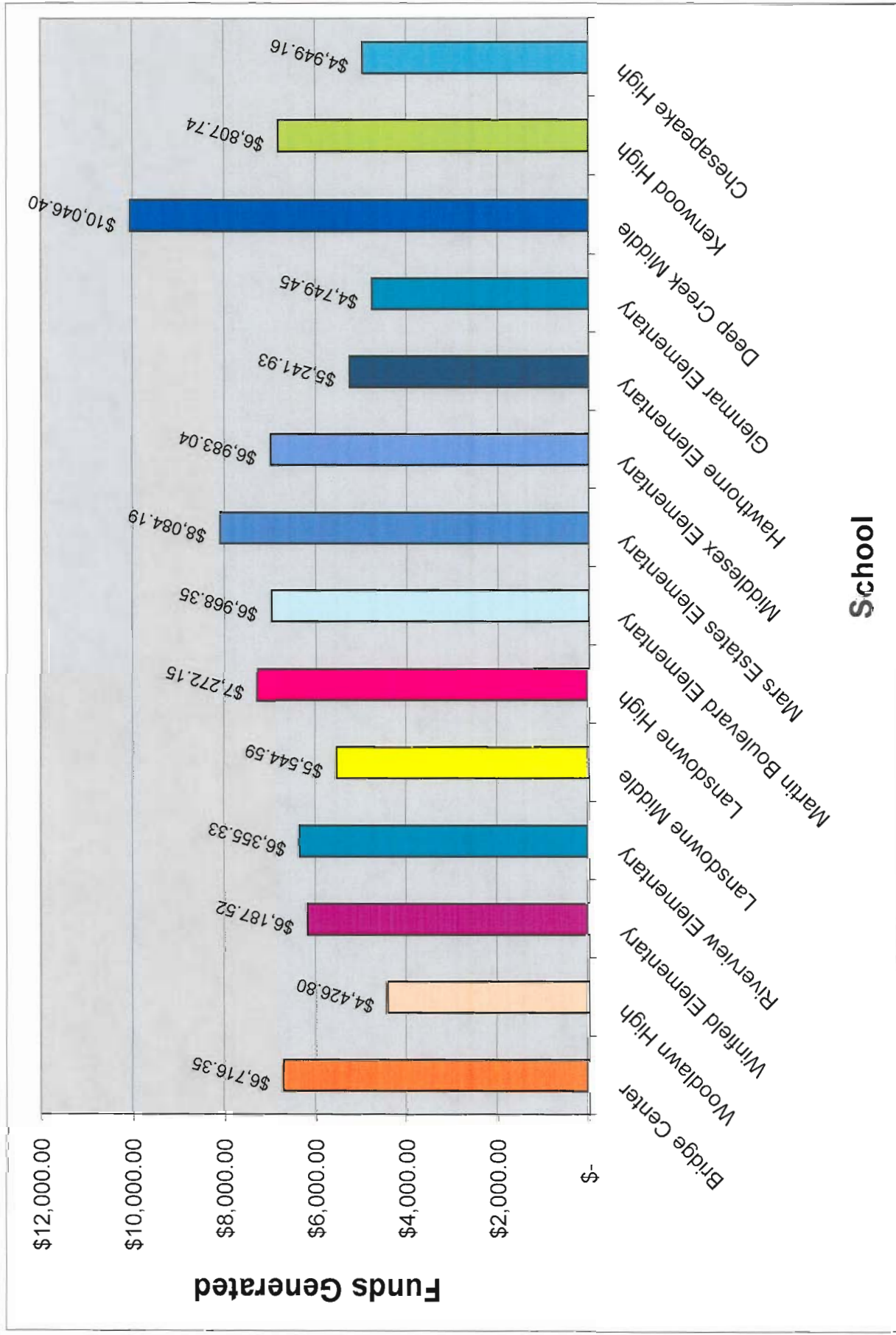
School-Based Health Center Visits 2005-2006 School Year

Exhibit N



School-Based Health Center Funds Generated by School 2005-2006 School Year

Exhibit O



Autism Waiver Services Provided by Type 2005-2006 School Year

Exhibit P

