Commonwealth of Virginia
Medicaid and Schools Program
Eligibility Matching

Virginia Medicaid
Department of Medical Assistance Services

UMass Chan Medical School

August 2022
Housekeeping Notes

Housekeeping Items:

• My name is Emily Hall, with the UMass Chan Medical School
• Please remain on mute during the presentation to reduce background noise.
• If you’re accessing audio via your phone, *6 will mute and unmute.
• Please take a moment to locate the Zoom “Q&A” feature where you can post questions.
• At the end of the presentation, we’ll have plenty of time to take questions and we’ll answer them aloud for everyone to hear.
Medicaid Eligibility Matching – Learning Objectives

Learning Objectives:

• Understand why an accurate eligibility match is important
• Understand how the results of the eligibility match are used in the reimbursement process for AAC and for the Direct Medical Services Cost Report
• Know the timeframes and deadlines involved
• Understand how to complete an eligibility match using the web-based system
• Gain some helpful tips and tools to ensure that your school division is maximizing your AAC and Cost Report reimbursement through employing a robust matching process, while meeting all program requirements
Medicaid Eligibility Matching – Why?

Cost-Based Reimbursement Methodology

Allowable Costs for Covered Direct or Admin Services (School Division specific)

RMTS Results (Statewide)

Medicaid Penetration Factor (School Division specific)

Gross Medicaid Allowable Amount

$500,000 \times 10\% \times 50\% = $25,000

Significant impact on reimbursement!
Before you can begin...

Before any school division can begin utilizing the web-based eligibility matching system, the following items must be in place:

1. Privacy & Security Agreement with UMMS directly
2. Designee form to designate any staff to be given login access to the website and permission to perform eligibility matching tasks on behalf of the school division. There are 2 separate eligibility roles indicated on the form:
   - **Eligibility Uploader**: Creates a school division student roster in correct upload format and template and uploads the file to the matching system
   - **Eligibility Reviewer**: Reviews the matching results, reviews possible matches and other scenarios requiring school division decision and manual intervention to complete the match
   - Roles can be assigned to the same person or to different people
   - Multiple users may be assigned if needed
Medicaid Eligibility Matching

- Medicaid Eligibility Matching is integral to the Medicaid and Schools Program.
- School Divisions will need to complete a minimum of 5 matches per year as of defined effective or snapshot dates.

<table>
<thead>
<tr>
<th>DMAS Eligibility Effective (&quot;snapshot&quot;) Date</th>
<th>Fiscal Quarter</th>
<th>Results Used in (AAC / Cost Report)</th>
<th>School Division Students to be Included</th>
<th>School Division Student Enrollment Effective (&quot;snapshot&quot;) Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 1</td>
<td>Q1 (7/1-9/30)</td>
<td>1st Quarter AAC</td>
<td>Division-wide total enrollment</td>
<td>September 1</td>
</tr>
<tr>
<td>December 1</td>
<td>Q2 (10/1-12/31)</td>
<td>2nd Quarter AAC</td>
<td>Division-wide total enrollment</td>
<td>December 1</td>
</tr>
<tr>
<td>December 1</td>
<td>Q2 (10/1-12/31)</td>
<td>Annual Cost Report</td>
<td>Dec. 1 Special Education Child Count</td>
<td>December 1</td>
</tr>
<tr>
<td>March 1</td>
<td>Q3 (1/1-3/31)</td>
<td>3rd Quarter AAC</td>
<td>Division-wide total enrollment</td>
<td>March 1</td>
</tr>
<tr>
<td>June 1</td>
<td>Q4 (4/1-6/30)</td>
<td>4th Quarter AAC</td>
<td>Division-wide total enrollment</td>
<td>June 1</td>
</tr>
</tbody>
</table>
Eligibility Files – “Snapshot” Concept

The CMS-approved reimbursement methodology prescribes the use of a “snapshot” in time on one day of the claiming period to calculate the Medicaid Penetration Factor to be used for that period.

Therefore, the Medicaid Eligibility Matching system compares:

*Includes all children age 2 through their 22\textsuperscript{nd} birthday enrolled in Medicaid (including FAMIS) as of the snapshot date

*Includes all students enrolled in the school division as of the snapshot date
### Eligibility Files – “Snapshot” Concept, cont.

#### Matching Illustration:

<table>
<thead>
<tr>
<th>School Division Enrollment File</th>
<th>DMAS Enrollment File</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Apple, Amy A; dob 1/1/11; F</td>
<td>Apple, Amy A; dob 1/1/11; F</td>
</tr>
<tr>
<td>2. Banana, Bert; dob 2/13/12; M</td>
<td>No matches</td>
</tr>
<tr>
<td>3. Carrot, Carl; dob 7/2/13; M</td>
<td>Carrot, Carl; dob 7/12/13; M</td>
</tr>
<tr>
<td>4. Eggplant, Ella; dob 6/3/10; F</td>
<td>Eggplant, Ellen; dob 6/3/10; F</td>
</tr>
<tr>
<td>5. Fig, Fiona; dob 3/18/09; F</td>
<td>No matches</td>
</tr>
<tr>
<td>6. Garlic, Gary; dob 3/22/18; M</td>
<td>No matches</td>
</tr>
<tr>
<td>7. Lettuce, Lucy; dob 4/10/18; F</td>
<td>No matches</td>
</tr>
</tbody>
</table>
Understanding the “snapshot” data – an example:

In my student enrollment file, my student Fiona Fig is a student that I know is enrolled with Medicaid. So why didn’t she match?

- **Possibility #1**: Fiona’s name, dob, gender is too different from how Medicaid’s enrollment file has her listed for it to match successfully.

  - **School Division Info**: DMAS Info:
    - Fig, Fiona; dob 3/18/09; F
    - Onion-Fig, Flora; dob 3/18/09; F

- **What can I do?**
  - Try adding her Medicaid ID to your school division enrollment file to increase the chance of getting at least a “possible match”
  - Use the “individual override” option to match with her Medicaid ID
Understanding the “snapshot” data – an example, continued:

- **Possibility #2**: Fiona’s enrollment with DMAS was not “active” on the day that the snapshot was generated
  - Eligibility can sometimes be retroactively reinstated
  - Eligibility can also be retroactively terminated

- **What can I do?**
  - Try adding her Medicaid ID to your school division enrollment file to increase the chance of getting at least a “possible match”
  - Use the “individual override” option to match with her Medicaid ID
  - If neither of these options yields a match, then you know that some kind of retroactive activity occurred or the child simply was not eligible for Medicaid on the snapshot date. There’s nothing more to do. This student cannot be counted as “eligible” in your claim statistics.
Student Roster Matching Instructions

As a Medicaid Coordinator (or other designated eligibility uploader or reviewer) my best friends are the instruction guides!

- Find what you need on the DMAS website page that’s dedicated to Medicaid school-based services: https://www.dmas.virginia.gov/for-providers/school-based-services/

- For Medicaid Eligibility Matching, refer to the “Medicaid Eligibility Matching User Guide”
  - Step-by-step instructions
  - Screenshots to help you follow along
  - Sample reports
DMAS Website

Medicaid and Schools program information is easy to find on the DMAS website. You don’t have to remember the link, simply navigate to:

https://www.dmas.virginia.gov

- Providers
  - School Based Services
Create a School Division Enrollment Roster

School Divisions upload their school-wide rosters including:

1. Name
2. Unique student ID
3. DOB
4. Gender
5. Address
6. Special Education Status
7. Medicaid ID ("RID") – if known
8. Optional Field
9. Parental Consent Status (required only on 12/1 Billing Compliance Review (BCR) matching file only)

Rosters must be run using a ‘snapshot’ of the School Division’s enrollment effective as of the 1st day of the 3rd month of the quarter (3/1, 6/1, 9/1 and 12/1)
Create and upload an Excel file including the required data using the correct file format and headings. Use the provided template to reduce the likelihood of formatting errors.
After successfully uploading file, the system verifies the file and completes the match.
Matching Process

System matching process separates students into these categories:

- **Eligible**
  - Auto-Matched
  - History Matched
  - Manually Matched

- **May be Eligible**
  - Possible Match
  - Duplicate Match
  - Review Needed

- **Not Eligible**
  - Auto-Rejected
  - History Rejected
  - Manually Rejected
Matching Status Definitions

- **Auto Matched**: These students were an exact match to a recipient in the DMAS eligibility file.
- **Manually Matched**: These students were manually matched to a recipient in the DMAS eligibility file.
- **History Matched**: These students exactly matched a pair of records (School Division record and DMAS eligibility file record) that was previously manually matched.
- **Possible Matched**: These students are close matches to one or more students in the DMAS eligibility file. Further review is required by school division personnel.
- **Review Needed**: These students were not manually matched or manually rejected. The school division reviewer assigned these records for further review.
- **Auto Rejected**: These students were not matches or even possible matches to any recipient in the DMAS eligibility file.
- **Manually Rejected**: These students were manually determined not to match any recipient in the DMAS eligibility file.
- **History Rejected**: These students exactly matched a pair of records (School Division record and DMAS eligibility file record) that was previously manually rejected.
- **Duplicate Matched**: These students are close matches to one or more students in the DMAS eligibility file. Further review is required by school division personnel.
Live Demonstration
Eligibility Matching Tips / Best Practices
Duplicate Matches

Always process your ‘Duplicates’ first!

Retrieve Records marked as ‘Duplicates’ and indicate the matching decisions. Only one ‘set’ of duplicates/multiples is displayed on the page at a time. Click ‘save’ to process and move on to the next ‘set.’
Possible Matches

Review the Possible Matches & make the ‘matching’ decision

Retrieve Records marked as ‘Possible Match’ and indicate the matching decisions.
### Review Needed Process

Retrieve Records marked for ‘Review Needed’ and indicate the matching decisions.

<table>
<thead>
<tr>
<th>Match</th>
<th>Non-match</th>
<th>Review Needed</th>
<th>RID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>DOB</th>
<th>Gender</th>
<th>Address Line 1</th>
<th>Address Line 2</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td></td>
<td></td>
<td>104000677811</td>
<td>Lemon</td>
<td>Larry</td>
<td>P</td>
<td>02/08/1999</td>
<td>M</td>
<td>15 SEAGULL LANE</td>
<td>24 CLOUDY STREET</td>
<td>RICHMOND</td>
<td>VA</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>104556077811</td>
<td>Lemon</td>
<td>Larry</td>
<td>L</td>
<td>02/08/1999</td>
<td>M</td>
<td>77 SESAME STREET</td>
<td></td>
<td>RICHMOND</td>
<td>VA</td>
</tr>
<tr>
<td>✔</td>
<td></td>
<td></td>
<td>100000685111</td>
<td>Nectanne</td>
<td>Nancy</td>
<td>N</td>
<td>11/18/2006</td>
<td>F</td>
<td>52 BAY BLVD</td>
<td>52 BAY BLVD UNIT B</td>
<td>RICHMOND</td>
<td>VA</td>
</tr>
<tr>
<td>✔</td>
<td></td>
<td></td>
<td>600049782361</td>
<td>Redd</td>
<td>Patricia</td>
<td>J</td>
<td>10/05/2001</td>
<td>F</td>
<td>19 NORTH STREET</td>
<td>970 LEMON LANE</td>
<td>RICHMOND</td>
<td>VA</td>
</tr>
</tbody>
</table>
Individual Override

You can ‘un-match’ a student from any ‘matched’ status:
You can ‘match’ a student from any ‘unmatched’ status:
Individual Inquiry

Look up a single student at a time using the ‘Individual Inquiry’ screen.
History Matching

The system remembers the history of manual matching decisions from one quarter to the next

1. Records left in ‘Possible Match’ or ‘Review Needed’ status are not considered in history matching

2. In order for a pair (School Division record compared to DMAS record) to be either ‘History Matched’ or ‘History Rejected’, the exact same pair must occur in a future quarter (Name, DOB & Gender)

3. ‘Manually Matched’ and ‘Manually Rejected’ pairs are remembered by the system and considered in history matching
   - If any of those data elements changes on either the School Division record or the DMAS record, the system will not apply history matching
The sum of Auto Matched + Manual Matched + History Matched = Total Eligible

Note that all Q2 files will include this response section. The system does not know if the file being matched is your 12/1 child count file or not, so this section is always displayed on a Q2 match.
## Reports

School Division data appears on the left

Matching DMAS data appears on the right

<table>
<thead>
<tr>
<th>School Division Upload File</th>
<th>DMAS Eligibility File</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td><strong>First Name</strong></td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>AMANNA</td>
<td>01/08/2006</td>
</tr>
<tr>
<td>GREGORY</td>
<td>01/06/2006</td>
</tr>
<tr>
<td>LUCINDA</td>
<td>10/22/2001</td>
</tr>
<tr>
<td>POLLY</td>
<td>12/21/1999</td>
</tr>
<tr>
<td>SALLY</td>
<td>01/08/2006</td>
</tr>
<tr>
<td>TIMOTHY</td>
<td>01/08/2006</td>
</tr>
<tr>
<td>VIOLA</td>
<td>03/06/2005</td>
</tr>
<tr>
<td>JAMIE</td>
<td>01/06/2001</td>
</tr>
<tr>
<td>WENDY</td>
<td>01/08/2006</td>
</tr>
</tbody>
</table>
This is important for identifying and excluding FAMIS students from eligibility statistics for Administrative Claims.

Medicaid Type is identified in the DMAS record.
Gender Neutral Matching

*We realize that some schools aren’t gathering ‘M’ or ‘F’ gender for students*

- **How to Match:**
  - **Match with both!** Upload your student matching file with all your students listed twice – once with all ‘M’ and once with all ‘F’.
    - For example: You have 500 total students to match, you would now have 500 students with ‘M’ in the gender field, and 500 students with ‘F’ in the gender field, totaling 1,000 students in your upload.
  - **Review and complete the match**, as usual.
  - **Remove duplicates** from the results.
    - For students that successfully matched to Medicaid eligibility, keep the student record that matched to Medicaid (either M or F).
    - For the students that did not match, keep either the M or the F (just not both)
  - **Upload the final matching file** with one record for each of your students so that you have the correct DMAS gender data and you get an accurate match.
Plan to do Medicaid Outreach

- The eligibility responses for all matched students include:
  - Aid Category
  - Aid Category Description
  - Benefit Plan Start Date

- Use this information to track when families will need to renew their eligibility and conduct outreach to help those families stay enrolled

⭐ This work qualifies as a Medicaid Administrative activity and is reimbursable!
Other Use of Eligibility Matching System

• We do use the Eligibility Matching system and process for one other purpose that was not reviewed today:

  ➢ BCR!

• Details of how this is used when completing your BCR will be included in the Cost Report & BCR presentation, which will happen closer to the time when you’ll be working on that.
Contact Information

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