

| Attendees:                              |   |                                     |                             |                                     |                        |
|---|---|-------------------------------------|-----------------------------|-------------------------------------|------------------------|
| <input checked="" type="checkbox"/>     | Jon Brogger   | <input checked="" type="checkbox"/> | Jennifer Inman              | <input type="checkbox"/>            | Annie Goodwin          |
| <input type="checkbox"/>                | Kathy Spoor   | <input checked="" type="checkbox"/> | Leslie Hopkins              | <input checked="" type="checkbox"/> | Cathy Mortell          |
| <input checked="" type="checkbox"/>     | April Fisk  | <input type="checkbox"/>            | Deanna Quinn                | <input checked="" type="checkbox"/> | Carrie Riemann         |
| <input checked="" type="checkbox"/>     | John Abplanalp  | <input type="checkbox"/>            | Lynda Thomas                | <input checked="" type="checkbox"/> | Benton Franklin        |
| <input checked="" type="checkbox"/>     | Patty Proctor   | <input type="checkbox"/>            | Hansine Fisher              | <input checked="" type="checkbox"/> | Clark County           |
| <input type="checkbox"/>                | Adams County  | <input checked="" type="checkbox"/> | Asotin County               | <input type="checkbox"/>            | Grant County           |
| <input type="checkbox"/>                | Chelan-Douglas  | <input type="checkbox"/>            | Clallam County              | <input type="checkbox"/>            | Jefferson County       |
| <input type="checkbox"/>                | Columbia County   | <input type="checkbox"/>            | Cowlitz County              | <input checked="" type="checkbox"/> | Kittitas County        |
| <input type="checkbox"/>                | King County   | <input type="checkbox"/>            | Island County               | <input type="checkbox"/>            | Mason County           |
| <input type="checkbox"/>                | Klickitat County  | <input type="checkbox"/>            | Kitsap Public Health        | <input checked="" type="checkbox"/> | Pacific County         |
| <input checked="" type="checkbox"/>     | NE Tri County   | <input checked="" type="checkbox"/> | Lewis County                | <input type="checkbox"/>            | Skamania County        |
| <input checked="" type="checkbox"/>     | San Juan County   | <input checked="" type="checkbox"/> | Okanogan County             | <input checked="" type="checkbox"/> | Tacoma-Pierce County   |
| <input checked="" type="checkbox"/>     | Snohomish Health District   | <input checked="" type="checkbox"/> | Skagit County               | <input checked="" type="checkbox"/> | Yakima Health District |
| <input type="checkbox"/>                | Thurston County   | <input type="checkbox"/>            | Spokane Reg Health District | <input type="checkbox"/>            | Walla Walla County     |
| <input checked="" type="checkbox"/>     | Whatcom County  | <input type="checkbox"/>            |                             | <input type="checkbox"/>            |                        |
| <b>Please Register for the webinar:</b> | <a href="https://attendee.gotowebinar.com/register/2253744130631232258">https://attendee.gotowebinar.com/register/2253744130631232258</a><br><b>Call-in: 1-888-407-5039/Participant PIN: 95523097</b> |                                     |                             |                                     |                        |
| <b>Desired Outcome:</b>                 | <input checked="" type="checkbox"/> Program updates, question and answers.  |                                     |                             |                                     |                        |

| Agenda Items                  | Lead     | Comments  | Summary Meeting Notes  |
|-------------------------------|----------|---|--|
| <b>Welcome</b>                | Jennifer | Attendance is tracked via webinar registration.   |  |
| Reminder: Contact Jon Brogger | Jennifer | Please direct email inquiries to Jon, with a CC to Jennifer.  | Please send all LHJ-related email inquiries to Jon Brogger at <a href="mailto:jon.brogger@hca.wa.gov">jon.brogger@hca.wa.gov</a>   |
| Code Reviewer Training Dates  | Jon      | Registration will be sent soon for the Eastern WA training dates, which are tentatively scheduled for: <ul style="list-style-type: none"> <li>• 4/24 Tri Cities</li> <li>• 4/25 Spokane</li> </ul> An additional King County training date is being considered in May or June.<br><br>Reminder: trainings are scheduled for: <ul style="list-style-type: none"> <li>• 3/1 King County</li> <li>• 3/8 Olympia</li> </ul> | The Eastern Washington dates are tentative—an official notice and registration will be sent soon. Once a date is determined for King County, a notice and registration will be sent out.<br><br>Code reviewer trainings are mandatory. If you have not registered, please contact Carrie with HFA at <a href="mailto:carrie@hfa3.org">carrie@hfa3.org</a> to register.<br><br><b>Question:</b> can a training in the NE region of the State could be considered?<br><b>Answer:</b> While there is nothing scheduled, other than the dates already mentioned, it may be an option for future trainings. |

|  |        |   |   |
|--|--------|---|---|
| Complete code reviewer training survey     | Jon    | Please respond to the survey monkey sent out after each training—this assists in refining the training.                               | A survey is sent to participants after each training. Please respond as this helps us develop future trainings.   |
| Q2 2015—Q1 2016 revised invoices           | Carrie | These quarters must be revised—see <i>Q215-Q116 Revised Invoices</i> PDF.   | A reminder to submit revisions for Q215-Q116 if you submitted your invoice prior to September 16, 2016. See the handout and manual for the process for creating a revised invoice in URMTS. Carrie with HFA will be following up with affected LHJs to offer additional guidance as needed.   |
| URMTS Enhancements                         | Carrie | Review of recent updates to the URMTS application. See <i>URMTS Changes</i> PDF   | Several enhancements to the URMTS were recently released, including several related to the direct charge tab. Please refer to the handout for additional information.   |
| Reminder: Annual Participant Training Due  | Carrie | Training is now posted. All participants are required to complete training.<br>Certifications Due: <b>March 27<sup>th</sup>, 2017</b> | Please complete this required training as soon as possible. As a reminder, if participants do not complete the training by the deadline, their moments will be coded to 99 until the training has been completed, which has a negative impact on the RMTS results   |
| End of quarter updates                     | Carrie | New participant in-person training due date is 3/27.  | All new participants must be provided in-person training, which is due by 3/27/17. Coordinators must certify their participant lists by 3/20/17.  |
| Comments/Questions                         | All    | Open for any comments/questions   | <b>Question:</b> What about participants who will return to work after the training deadline (3/27).<br><br><b>Answer:</b> to Consider whether the participant should be included in the time study for that quarter. Missing the deadline would result in that participants moments being coded to 99 until they return and are able to complete the training. |
| <b>Next Meeting: 3/20/17 3:30pm-4:00pm</b> |        |   |   |
| <b>Adjourn</b>                             |        |   |   |

# Q2-Q4 2015 & Q1 2016 Client ID Review Instructions

## Background

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In preparing the RMTS results for the reconciliation invoices, HFA staff discovered instances where data had been entered into the client ID field that appear to be text other than a client ID. This affects Quarter 2, 2015 – Quarter 1 2016.

The database that generates the RMTS results for each consortium uses all MAC linkage-related moments with data in the client ID field in the calculation of the activity percentage for these codes. Since not all LHJs use the same client ID format, the URMTS system was programmed to recognize anything entered into the field as a client ID.

Unfortunately, some client ID fields contain text other than a client ID. Counting them as client ID would inflate the percentage of moments in the linkage related MAC codes where a client ID is applied and would result in the LHJs being out of compliance with both the federally-approved Cost Allocation Plan that went into effect with Q2 15 and with the reconciliation plan covering the eleven quarters affected by the deferral.

## Required Action

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As a result, the erroneous data entered into the client ID field it must be corrected in order to get an accurate percentage of MAC linkage-related codes associated with a client ID.

The reason for correcting these errors in the client ID is threefold:

- To ensure compliance with the federally approved MAC Cost Allocation Plan and the Reconciliation proposal.
- To preserve the original RMTS files for audit purposes - they are source documentation for the original invoices. Their results were certified, and invoices were submitted to HCA using this data.
- To have a transparent process for correcting erroneous client IDs and to provide an audit trail that will clearly show how the corrected RMTS file was created.

### Reconciliation RMTS Results and Invoices

While the client IDs are being corrected, HFA will suspend processing RMTS results for the reconciliation invoices. However, HFA will continue to open each reconciliation invoice on the published schedule so that LHJs may begin entering expenditures and funding into URMTS.

The first two quarters of reconciliation results (Q3 and Q4 2012) that have already been processed will need to be revised. LHJs that previously certified these invoices will need to re-certify them once revised RMTS results have been entered.

Once all the client IDs are corrected, HFA will resume processing the RMTS results for the reconciliation invoices.

### Q2 2015 –Q4 2015 & Q1 2016 Invoices

The invoices for these quarters (Q2 2015-Q4 2015 & Q1 2016) will need to be revised to reflect the updated RMTS results.

# Q2-Q4 2015 & Q1 2016 Client ID Review

## Timeline & Checklist

- **August 31<sup>st</sup> -September 1<sup>st</sup>:** HFA will delete the random moment coding certifications for all LHJs for quarters 2, 3, and 4 2015 and Q1 2016. The RMTS results will be unlocked and the original RMTS results archived.
- **September 9<sup>th</sup>:** LHJs will complete their client ID review, make necessary corrections, and recertify all quarters.
- **September 13<sup>th</sup>:** HFA will re-process the RMTS results for the four quarters affected by the inaccuracies in the client ID.
- **September 15<sup>th</sup>:** HFA will resume processing the RMTS results for the reconciliation invoices in the URMTS, as follows:
  - September 15: Q1-Q4 2013
  - September 19<sup>th</sup>: Q1-Q2 2014
  - September 26<sup>th</sup>: Q3 2014-Q4 2014
  - October 3<sup>rd</sup>: Q1 2015
- **October 14<sup>th</sup>:** LHJs will have completed all reconciled invoices and submitted an electronic copy of the excel-based A19 for HCA review.

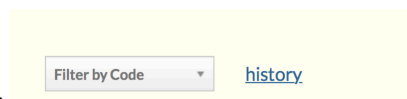
## LHJ Tasks

### Correcting the Client IDs

- Each LHJ will review its client IDs for Q2, Q3, Q4 2015, and Q1 2016 using the attached summary report.
  - All corrections must be done in the Code Review section of URMTS.
  - Any client IDs that are being modified should include a comment explaining why a change was made.
- The review of moments with client IDs, including any necessary corrections and certification of the final code review for each quarter, must be completed within **5 business days (no later than September 9<sup>th</sup>)**. This is a tight turnaround, but it is necessary to keep the overall reconciliation process moving as closely as possible to the original timeline in order to meet the October 14<sup>th</sup> deadline.
  - LHJs that have no corrections to their client IDs will still need to recertify their final code review.

### How to Correct Client IDs

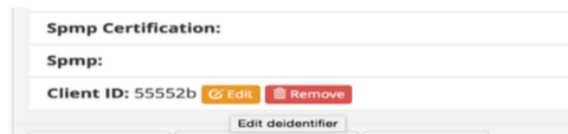
- Review the attached report to identify client IDs that need correction. This includes any ID that is invalid or contains erroneous text. (If there is no valid client ID, this field should be blank.)
- Login to URMTS.
- Click on the “Coding Queue” menu item.
- Select the quarter using the filter at the top of the page.



- Click on the “History” button to open the moments.

# Q2-Q4 2015 & Q1 2016 Client ID Review

- Search for the moments using the filters (the code reviewer can search by RMTS participant or use the activity code filter – retrieve all moments assigned to the MAC-related linkage codes - 6b,7b,7d, 10b, and 12b)
- Click on “return to coding” next to the moment.
- Return to your coding page after you have returned all moments to the coding queue.
- Click on either “edit” or “remove” next to the client ID. Enter the change, and click save. Repeat this for all moments a



client ID that must be edited.

## How to Certify “Codings Finalized”

- When the LHJ has confirmed that all corrections to the client ID for a quarter are completed, go to the RMTS menu item.
- Select the appropriate quarter (for example 2015.Q2.Consortium 9)
- Click on the red “certify” button.
- Click the check box next to the certification statement, then click “submit”.
- Repeat for all four quarters (2015 Q2, 2015 Q3, 2015 Q4 and 2016 Q1).

## Reconciled Invoices

- LHJs should not certify any reconciled invoices until notified by HFA.
- LHJs who have already certified a Q3 or Q4 2012 reconciliation invoice will need to adjust funding, re-certify the invoice and the CPE form, once the revised RMTS results are populated in the reconciliation invoices.
  - HFA will unlock these invoices and delete the CPE form.
  - The LHJ will adjust funding as needed.
  - The LHJ will re-certify and submit the invoice and regenerate the CPE form.
- LHJs who have begun entering data may need to adjust funding once the new reconciled RMTS results are posted.
- HFA will notify each consortium when the revised RMTS results for reconciliation results have been entered into the URMTS' reconciliation invoices.

## Submit Revised Invoices

- Each LHJ must submit revised invoices for 2015 Q2, 2015 Q3, 2015 Q4 and 2016 Q1.
- Invoices cannot be revised until the original invoice has been paid.
- Once the LHJ receives payment, a revised invoice will need to be created in URMTS. See the URMTS User Guide for step-by-step instructions for preparing and submitting a revised invoice.

# URMTS Update: Invoice Changes

February 2017

Effective for the Q4 2016 invoice, several changes to the URMTS invoice have been deployed. Below is a summary of the changes. For further details and/or instructions, please see the updated URMTS User Guide.

## Direct Charge Page

1. The headers for the sections have been renamed for accuracy. The first section will now read “Single Cost Objective Employee Expenses”. The 2<sup>nd</sup> section will now read “Contract Expenses”.
2. There is a box to select so that if you are entering a direct charge for a subcontractor, it can be noted.

Activity Type: Title XIX Medicaid Interpretation fi...  
MER Percent: 100 %  
Is Subcontractor?   
Personal Service Contracts: 0.00

3. A new section has been added in order to document “Non-Matchable Expenses.” This section would be used if the contract you are direct charging has expenses that cannot be assigned to the MAC single cost objective. (In the Excel version of the MAC invoice this is documented in lines 45 and 96 of the direct charge page.)

| Total Non-Matchable Direct Charge Costs |                    |               |                   |                            |               |
|---|--------------------|---------------|-------------------|----------------------------|---------------|
|   | Salary             | Benefits      | Travel & Training | Personal Service Contracts | Other Costs   |
| Employee                                | \$22,000.00        | \$0.00        | \$0.00            | \$100.00                   | \$0.00        |
| Contract                                |                    |               |                   | \$500.00                   | \$0.00        |
| <b>TOTALS</b>                           | <b>\$22,000.00</b> | <b>\$0.00</b> | <b>\$0.00</b>     | <b>\$600.00</b>            | <b>\$0.00</b> |

4. The direct charges will indicate (based on the code selected) if the charge applies to CP4 or CP5.

| Activity | Employee First Name | Employee Last Name |
|----------|---------------------|--------------------|
| 11B CP4  | John                | Doe                |

5. A new box has been added that shows the direct charge subtotals, by cost pool. This box will show the subtotals for the direct charges by cost pool and then the totals by cost pool, after the MER has been applied.

|             | CP4      | CP5       |
|-------------|----------|-----------|
| Subtotals   | \$53,454 | \$443,454 |
| MER Applied | \$23,439 | \$123,435 |

## HCA A19 Approval

Beginning with Q3 2016 invoices, HCA will note when an A19 has been approved in URMTS. Once HCA approves an A19, the invoice document vault will also be locked—no further changes can be made to the documents either by uploading new documents, editing, or deleting them.

ST: 2016q2 Claim Locked on 9/28/2016 at 4:01pm

## Invoice Document Vault for Revised Invoices

The invoice document vault will store invoices for revised invoices separate from the original invoice documentation. Previously, all backup documentation was stored in the same folder for one quarter.

# URMTS Update: Invoice Changes

February 2017

## Invoice Navigation

A new navigation button has been added on the basic information page of the invoice. This button can be used to return the user to the claims summary page for the applicable invoice.

**Basic Information** [Claim Summary](#)

Invoice Properties