

# Opening up the Black Box of Special Education!

## A Deep Dive



December 1, 2023 | **NIU NAPERVILLE**



# Introductions

Mark Altmayer, CFO

Huntley Community School District 158



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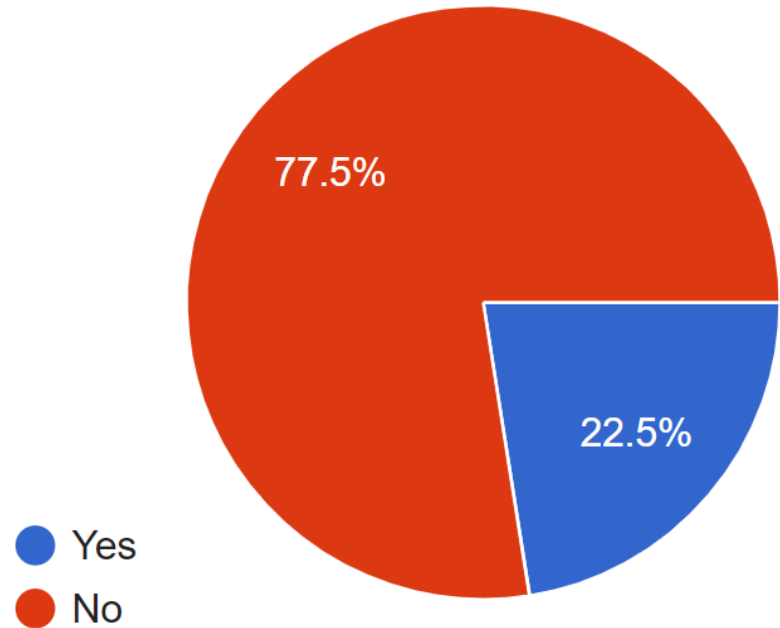
# SPECIAL EDUCATION SURVEY!



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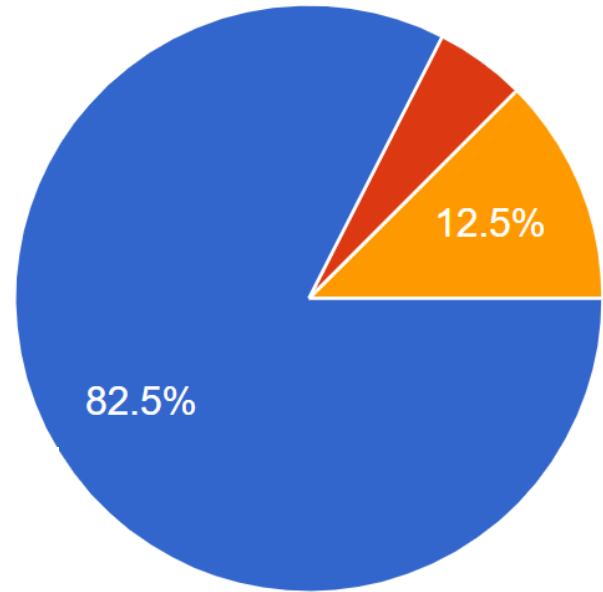


Do you have a full understanding  
of ALL Special Education  
Revenues and Expenditures?



Do you work well with your Special Education Department?

- Yes
- No
- Could be better



82.5% Work Well  
With SPED!!

77.5% **DO NOT**  
have a FULL  
Understanding!

Hmmm, Very Interesting!!!



# Survey

## 1. Do you “Work” with your Special Education Department?

- ✓ Does Fiscal review ALL claims?
- ✓ Does Fiscal have oversight of Medicaid and involvement with all Grants?
- ✓ Do you meet regularly with your Sped team?

## 2. Approximately what % of your Operating Budget is for Special Education?

- a. 5%
- b. 8.2%
- c. 13.1%
- d. 17.0%



# Agenda:

- Medicaid
- Workload & Caseload Management
- Special Education Claims
- IDEA Grants
- Questions?



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# Medicaid



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# Fee for Service

- Benchmarking – Identifying the Opportunity!
  - The 158 Story...
- Opportunities and Suggested Next Steps

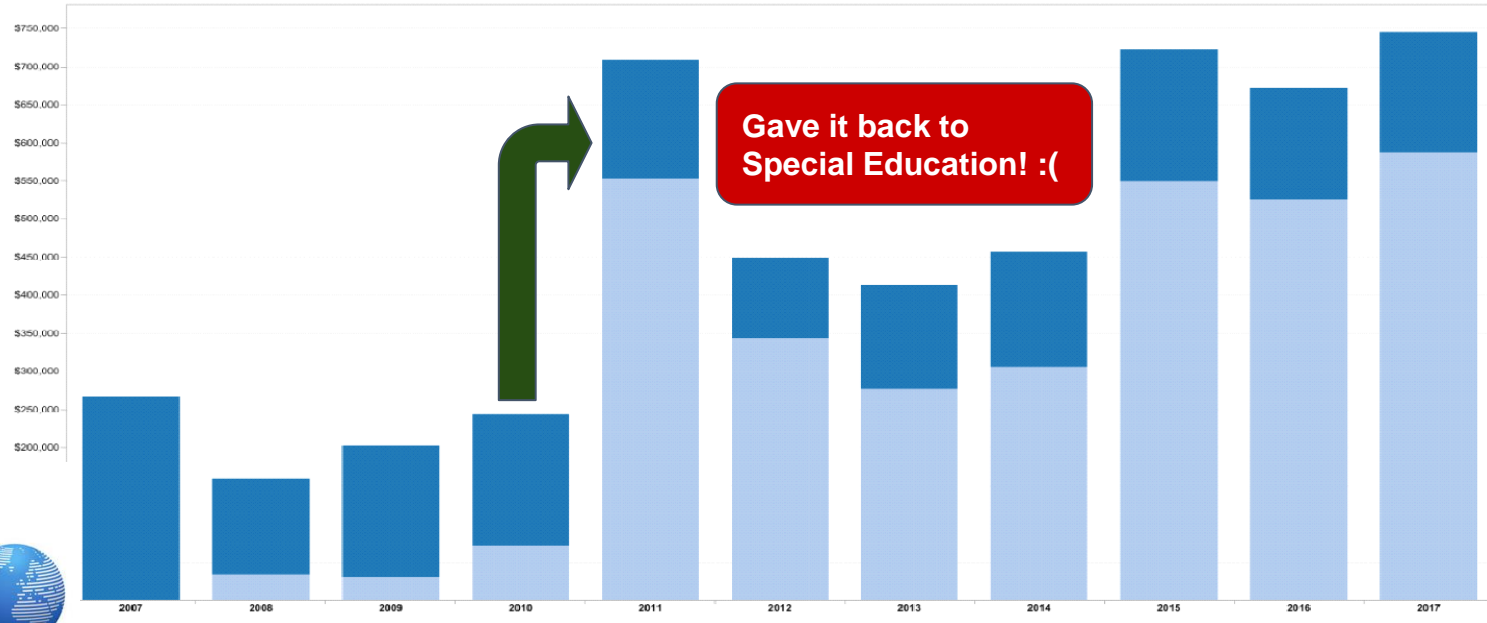


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# Fee for Service – The Huntley Story

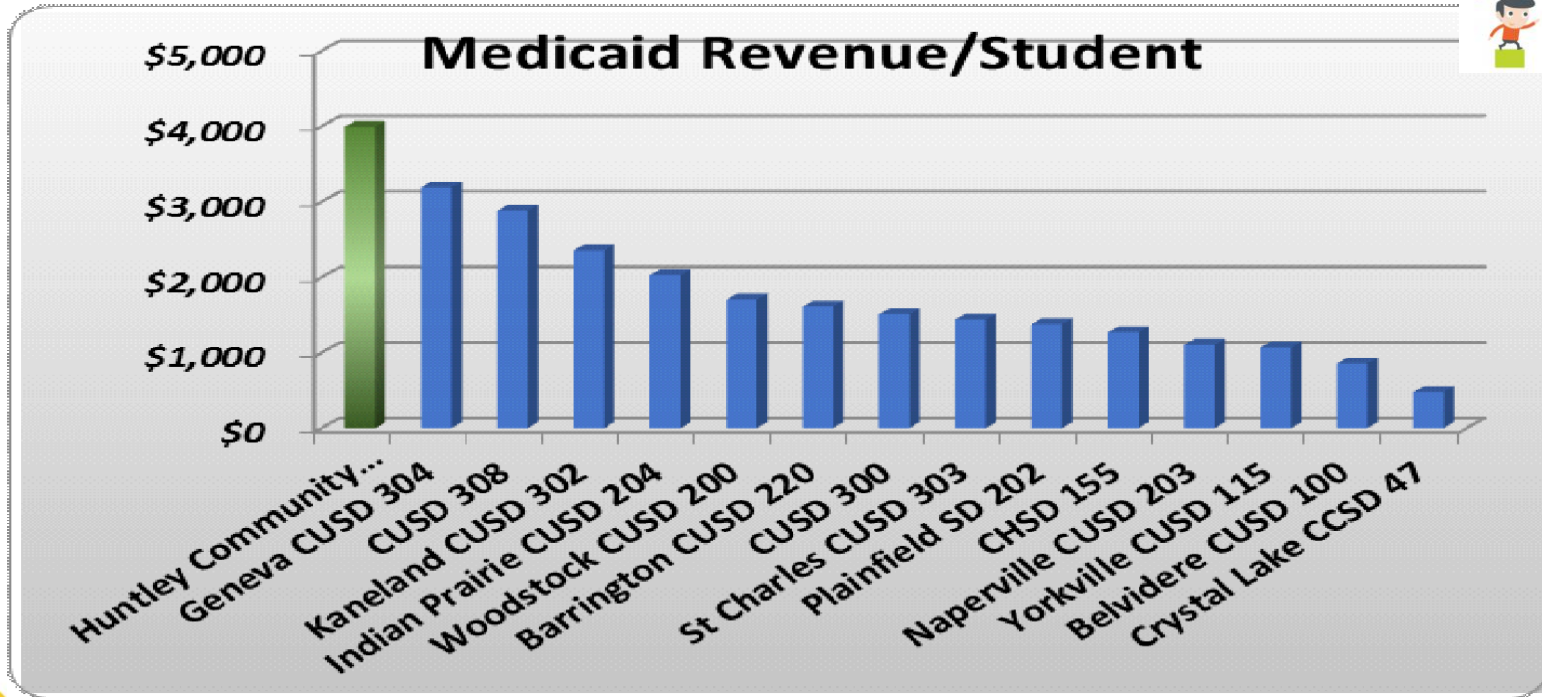
Revenue Bar Chart  
Huntley Community School District 150  
By: Detail Source  
Source: 5 Year Budget and AFR



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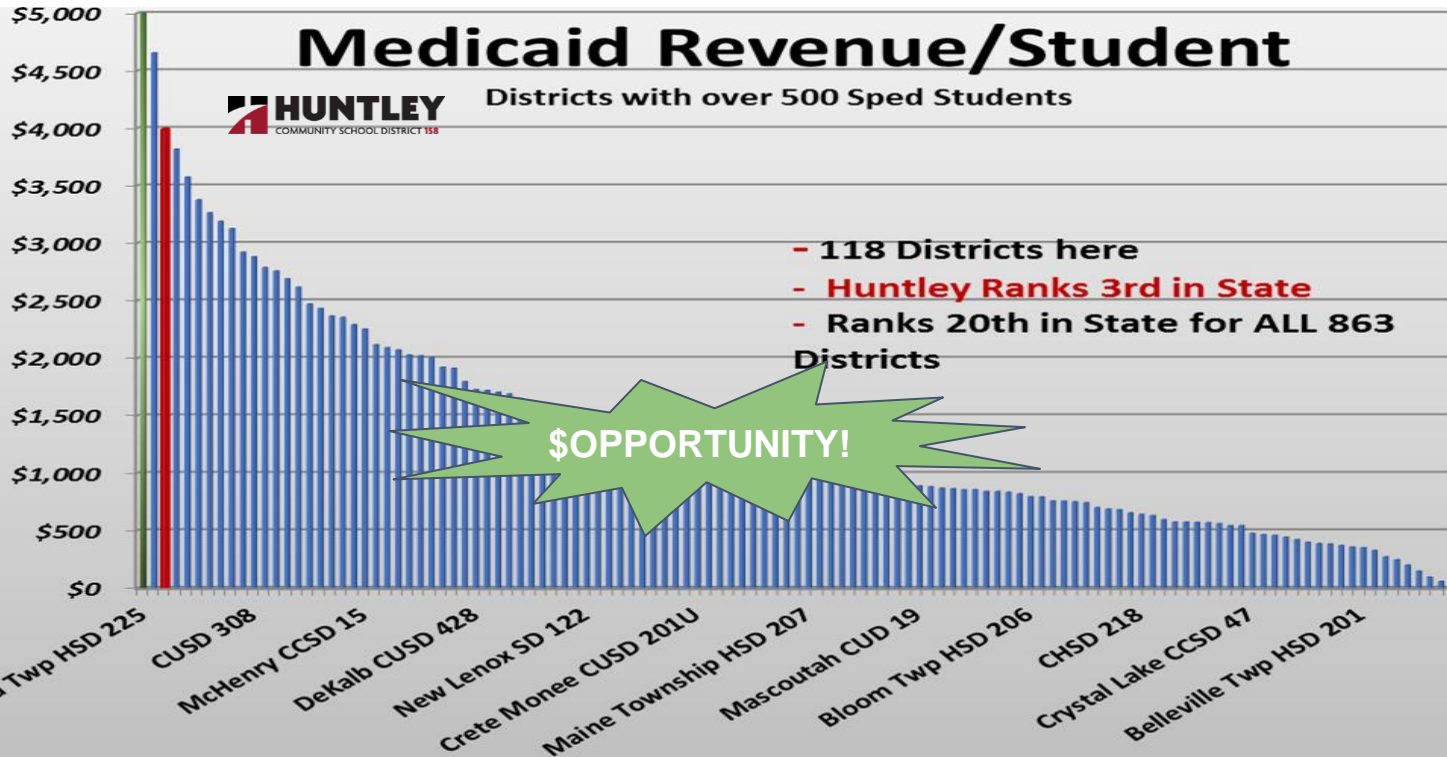
# Benchmarking Medicaid



# Medicaid Revenue/Student



Districts with over 500 Sped Students



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# Fee for Service – Opportunities

- Open the box, and start “working” with SPED!
- Identify your Medicaid Eligible Students
  - Know your number!
  - Check Name Configurations Against the HFS Medi System - Challenge your Medicaid claing admin! Free & Reduced List
- Identify Staff
  - Related Services Staff
  - 1:1 Aides (Schools & Private Facilities), Nurses, Audiologists, etc.
  - Contracted Related Services
- Use a Medicaid Vendor
- Create Oversight & Accountability!
  - Caseload & Workload
  - Recording of Sessions
  - IEP Minutes – Is your Staff Meeting their Minutes?



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# Fee for Service – Manually Entered Data

February 2023

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1 7	2 7	3 7	4
5	6 7	7 7	8 7	9 sick	10 7	11
12	13	14 sick	15 sick	16 7	17 Non-Attendance Day	18
19	20 President's Day No School	21 Institute Day No School	22 7	23 7	24 7	25
26	27 sick	28 7				
1-Enter number of hours student was in attendance per day 2-At the end of every month the aide and supervisor should sign and return original calendar to Debbie Smith @ the district office 3. Keep a copy for your records						

Student Name: John Smith

Student Grade/School: 3rd / Conley

1:1 Aide: Deb Anderson Deb Anderson  
(Print and Sign Name)

Supervisor: Jen Hanson JenHanson  
(Print and Sign Name)



# Fee for Service – Medicaid Eligible #

- Identify your Medicaid Eligible Students
- Sign into PCG! <https://claimingsystem.pcgus.com/il/Account/Login>
- Select the Oct-Dec 2022 Date Range
- Quarterly Drop Down - Select Student Counts



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# Administrative Outreach

- FEDERAL reimbursement to state and local agencies for activities related to the administration of the State's Medicaid plan
- Claims submitted through PCG
- Reimbursement for:
  - Medical and health related outreach
  - Case management
  - Admin activities related to delivery of services



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# Administrative Outreach

1. Create account with PCG (Public Consulting Group)
2. Verify your number of Medicaid eligible students is accurate
3. Identify & add staff for your participant list - NEXT SLIDE
4. Communicate with staff that they are participating in Medicaid Administrative Outreach and to expect random moment time studies (RMTS)
5. Monitor RMTS to ensure all your staff is completing them
6. Submit quarterly financial data



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# Who Completes Random Moment in Time Study?

- ☐ Audiologist
- ☐ Registered Nurse or Licensed Practical Nurse
- ☐ Occupational Therapist
- ☐ Physical Therapist or Physical Therapist Assistant
- ☐ Social Worker
- ☐ School Psychologist & Licensed Clinical Psychologist
- ☐ Speech Language Therapist or Speech Assistant
- ☐ Interpreters
- ☐ Case Management/Administration
- ☐ **Orientation & Mobility Specialist**
- ☐ **Licensed Clinical Professional Counselor (LCPCs)**
- ☐ **Registered Behavior Technician**
- ☐ **Licensed Marriage & Family Therapist**
- ☐ **School Health Aides**



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MEDICAID SYSTEM (MMIS)  
 MARS SUBSYSTEM (M27679N)  
 REPORT ID: 1BPEN571  
 SEQUENCE.: PROVIDER ID,CATEGORY OF SERVICE

STATE OF ILLINOIS  
 HEALTHCARE AND FAMILY SERVICES  
 LEA QUARTERLY TOTAL COST SUMMARY REPORT  
 QUARTER 10/01/22 THRU 12/31/22

RUN DATE: 01/14/23  
 RUN TIME: 23:07:05  
 PAGE: 625

PROVIDER ID: 366005127002  
 PROVIDER: HUNTLEY COMMUNITY SCHOOL DISTR  
 ADDRESS: 650 ACADEMIC DR  
 CITY: ALGONQUIN IL 60102-4423  
 COUNTY:

PROVIDER TYPE 047

PAYEE NUMBER: 3660051276014201  
 PAYEE NAME: HUNTLEY COMMUNITY SCHOOL  
 PAYEE ADDRESS: 650 ACADEMIC DR  
 PAYEE CITY ST: ALGONQUIN IL 60102-44230

CATEGORY SERVICE	TOTAL SERVICES	TOTAL CLIENTS	TOT/AMT BILLED	SERVICES REJ	TOT/AMT REDUCED	TOT/AMT DEBIT	TOT/AMT CREDIT	TOT/AMT PAYABLE	FEDERAL MATCH
010 NURSIN	424	15	31,672.35	45	4,222.84	.00	4,495.58-	31,945.09	15,572.29
011 PT	177	29	7,078.94	48	6,092.53	.00	3,728.44-	4,714.85	787.34-
012 OT	111	66	5,647.46	65	7,852.36	.00	4,266.56-	2,061.66	2,943.13-
013 S/L/O	2,477	210	90,015.87	821	32,765.38	.00	4,431.99-	61,682.48	32,715.86
030 EPSDT	9	5	108.00	0	18.20	.00	.00	89.80	53.92
056 O/TRAN	3,359	231	74,502.62	284	8,370.41	.00	2,071.29-	68,203.50	39,155.92
058 SOCIL	1,303	191	36,317.83	146	6,193.57	.00	1,922.03-	32,046.29	17,209.38
059 PSYCHO	10	58	615.05	3	1,184.01	.00	1,050.21-	481.25	754.03-
093 IND PR	3,062	62	176,512.07	276	81,635.30	.00	72,043.83-	166,920.60	29,711.28
TOTALS	10,932	867	422,470.19	1,688	148,334.60	.00	94,009.93-	368,145.52	129,934.15

DATE VOUCHER NUMBER PAYABLE AMOUNT

DATE VOUCHER NUMBER PAYABLE AMOUNT

DATE VOUCHER NUMBER PAYABLE AMOUNT

10-18-22 2022291G259 .00  
 10-21-22 2022294F522 .00  
**10-22-22 2022305H786 .00**  
 11-01-22 2022305H786 .00

11-18-22 2022322E450 4,649.66  
 11-29-22 2022333H114 .00  
 12-06-22 2022340J362 .00  
 12-13-22 2022347H959 .00

12-16-22 2022350E978 125,284.49  
 12-20-22 2022354J721 .00

**DPA 3790B(N-1-02)**

# Work Load & Caseload Management



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# Work Load vs. Caseload

**Caseload** is the number of students with IEPs assigned to that teacher or specialist

**Work Load** is all of the responsibility required of the special education teacher and specialist to meet the needs of the students.



# Work Load

\*Illinois Admin Code 226.735 Work Load for Special Education

Work Load Plan is designed to allow:

- FAPE (Free and Appropriate Public Education) in the LRE (Least Restrictive Environment)
- Appropriate staff number to support the students' IEP



# Work Load Plan

Plan should be based on:

1. Individual instruction time
2. Consultative services and collaboration
3. Attendance at IEP meetings
4. Paperwork and reporting

\*Speech therapist caseloads shall not exceed 60 students



# Considerations

- Travel
- Needs of the students
- Meetings required (reevaluation vs IEP)
- Direct and consult minutes
- Obligations of CBA
- Other duties as assigned (MTSS, study halls, etc.)



[illegible]



MONTH

WEEK

DAY

January 2023



MON	TUE	WED	THU	FRI
2 9a ALTERGOTT, BRANDON 10a APPLE, DAVID	3	4 11:30a APPLE, BELLA 2p GLASS, GEORGE 2p SMALL GROUP	5 2p BAAR, JEFFREY	
9 9a ALTERGOTT, BRANDON	10	11	12 2p BAAR, JEFFREY	
16 9a ALTERGOTT, BRANDON 10a APPLE, DAVID	17	18 11:30a APPLE, BELLA 2p GLASS, GEORGE 2p SMALL GROUP	19 2p BAAR, JEFFREY	
23 9a ALTERGOTT, BRANDON	24	25	26 12p SMALL GROUP 2 2p BAAR, JEFFREY	
30 9a ALTERGOTT, BRANDON	31	1 11:30a APPLE, BELLA 2p GLASS, GEORGE 2p SMALL GROUP	2 2p BAAR, JEFFREY	

Scheduled

Cancelled/Skipped

Recorded

Consult Recorded

Gen Ed Recorded

Makeup Attempt

Other

support

## DARLEEN SPEECH T [ ACME TOWNSHIP ]

SEE YOUR: [SCHEDULE](#) [STUDENTS](#) [THERAPY RECORDS](#) [GROUPS](#) [SESSIONS](#) [REPORTS](#) [ACTIVITY](#)

Today's Sessions

Scheduled Students

Calendar

Day ◀ 12/22/2022 ▶

### Scheduled Sessions

'Record All' Note

Record All



Skip All

Move All

Name	Status	Individual / Group	Time	Duration	Record Sessions
<a href="#">BARBER, JEVON</a>	IEP	<a href="#">SMALL GROUP 2</a>	12:00 PM	60	<div>Session Notes</div> <div><a href="#">Record</a> ▼ <a href="#">Skip</a> <a href="#">Edit</a> <a href="#">Move</a></div>
<a href="#">BARNEY, DARWIN</a>	IEP	<a href="#">SMALL GROUP 2</a>	12:00 PM	60	<div>Session Notes</div> <div><a href="#">Record</a> ▼ <a href="#">Skip</a> <a href="#">Edit</a> <a href="#">Move</a></div>
<a href="#">BAAR, JEFFREY</a>	IEP	Individual	02:00 PM	30	<div>Session Notes</div> <div><a href="#">Record</a> ▼ <a href="#">Skip</a> <a href="#">Edit</a> <a href="#">Move</a></div>

Add New Session

### Scheduled Activities

Record All

Skip All

Move All

Activity Name	Time	Duration	Record Activity
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Add New Activity



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# Special Education Claims



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# HUGBUG

## Illinois Purchased Care Review Board



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# Orphanage Reimbursement

Reimburses 100% of the current year tuition costs for eligible students with disabilities who are wards of the State under the guardianship of a public agency or who reside in state residential facilities. This includes regular term and summer term.

## Reimbursement Formula

$$\text{Education Costs} + \text{Required Transportation} = \text{Reimbursement}$$

**Regular Orphanage Tuition Claim Due: June 15<sup>th</sup>**  
**STUDENTS MUST BE CODED CORRECTLY IN ISTAR BY MAY 15TH!!!!**

**Summer Orphanage Tuition Claim Due: November 1<sup>st</sup>**  
**Reimbursed Quarterly**



Illinois State Board of Education Darleen Hoffmann

Home Approvals and Claims Residential Claims IEP Admin Goal Mine Facility Search IEP Quality

Approvals Claims Programs Upload Files Case Load Definition

Reported Un-Reported Possible Youth In Care

Possible Youth In Care

This is a list of students that have been identified on a Department of Children and Family Services (DCFS) file provided to ISBE. These students may be either currently on the list, then they are currently not listed in the education data collection system as an orphanage student (i.e., Fund Code of E or F) or, they are in I-Star, but miscoded as not being an orphanage student (i.e., Fund Code of A or B).

PLEASE NOTE: At this time ISTAR validation is only updated on a monthly basis, so new Fund E or F students may not be approved until the end of the month or B until you confirm with ISBE.

Entity: Huntley Comm Sch Dist 158 (2)

School Year: 2019-2020

Search

School Year	District	School	RCDTS	Exit Date	Grade	ISAR
2020	Huntley Community School District 158	Marlowe Middle School	44-063-1580-22-1003	05/22/2020	8 - Grade 8	
2020	Huntley Community School District 158	Martin Elementary School	44-063-1580-22-2005	05/22/2020	4 - Grade 4	
2020	Huntley Community School District 158	Leggee Elementary School	44-063-1580-22-2004	05/22/2020	5 - Grade 5	
2020	Huntley Community School District 158	Conley Elementary School	44-063-1580-22-2007	05/22/2020	4 - Grade 4	
2020	Huntley Community School District 158	Mackeben Elementary School	44-063-1580-22-2006	05/22/2020	Kindergarten	
2020	Huntley Community School District 158	Conley Elementary School	44-063-1580-22-2007	05/22/2020	4 - Grade 4	
2020	Huntley Community School District 158	Chesak Elementary School	44-063-1580-22-2003	05/22/2020	Pre-K	A
2020	Huntley Community School District 158	Heineman Middle School	44-063-1580-22-1002	05/22/2020	7 - Grade 7	
2020	Huntley Community School District 158	Marlowe Middle School	44-063-1580-22-1003	05/22/2020	8 - Grade 8	
2020	Huntley Community School District 158	Leggee Elementary School	44-063-1580-22-2004	05/22/2020	Kindergarten	A
2020	Huntley Community School District 158	Leggee Elementary School	44-063-1580-22-2004	05/22/2020	Kindergarten	X
2020	Huntley Community School District 158	Mackeben Elementary School	44-063-1580-22-2006	05/22/2020	Kindergarten	
2020	Huntley Community School District 158	Marlowe Middle School	44-063-1580-22-1003	05/22/2020	8 - Grade 8	
2020	Huntley Community School District 158	Martin Elementary School	44-063-1580-22-2005	05/22/2020	4 - Grade 4	
2020	Huntley Community School District 158	Marlowe Middle School	44-063-1580-22-1003	05/22/2020	8 - Grade 8	

# Orphanage

I-Star now provides a Possible Youth in Care report that outlines those eligible students for Fund Code E!



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# Tuition Cost Sheets (Orphanage & Tuition-in)

- Cost sheets impact reimbursement for orphan and excess cost
- Include all appropriate staff (1:1 aides)
- Check cost sheets from other schools if they use this for billing purposes (Tuition-in)
- Check cost sheets from your special education department if your business office is not involved in the process
- **See Handout** in Google Drive



# Private Facility Tuition Reimbursement

Provides reimbursement for a portion of the private facility tuition costs incurred by the district from the prior school year

Reimbursement Formula	
Reimbursement Level	Costs exceeding 2x the district per Capita cost

**Private Tuition Claim Due: August 15<sup>th</sup>**

**Reimbursed Quarterly**



# Private Facility Tuition Reimbursement Tips

- 1:1 Aides
- Auditing private facilities
  - Private facilities are assigned a daily rate by the Illinois Purchased Care Review Board
  - You cannot get reimbursed for more than the daily rate so check your bill
  - You can find this in iStar by searching Private Facility or more information at <https://www.isbe.net/Pages/Illinois-Purchased-Care-Review-Board.aspx>
  - Double check that start dates in IStar, Embrace/IEP software and the private facility all agree! Reimbursement can be lost if the start date in IStar is after the actual date at the facility.



# Federal Room & Board Reimbursement

District must have an approved ISBE Private Residential Placement Room & Board Reimbursement Form to transmit a claim

[Form 34-37: Application for Approval of Private Residential Placement](#)

**Claims submitted monthly through I-Star**



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# Excess Cost Claim

- Reimbursement for educational costs of high-cost, high-need students whose costs are in excess of 4 X's the district per capita tuition charges
- There is no dedicated budget line-item allocation for Excess Cost Students
- Reimbursed from excess federal room & board funds
- Recent prorations range from 0% to 39.5%
  - Most recent proration: 21.6%
  - FY 2021: 0% reimbursement
  - FY 2022: TBD

**Excess Cost Claim Due: July 15<sup>th</sup>**

**Reimbursed Quarterly**



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# IDEA Grant



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# IDEA Part B Flow-Through Grant Allocations

## Calculation Factors:

- 85% Based on Total Enrollment at \$518.62 per student
- 15% Based on 3 year-rolling average of Low-Income Enrollment
- Hold Harmless based on 1998 December 1st Child Count

**Base Year Amount for Illinois \$145,798,830**



# IDEA Preschool Grant Allocations

## Calculation Factors:

- 85% Based on Total Enrollment at \$485.55 per student
- 15% Based on 3 year-rolling average of Low-Income Enrollment
- Hold Harmless based on 1996 December 1st Child Count

**Base Year Amount for Illinois \$12,582,011**



# Writing & Spending Your Grant

## Allowable Expenditures:

- Special Education staff Salaries and Benefits (no longer needed names)
- Supplies & Equipment
- Travel Expenses for Personnel
- Professional Development, In-Service, Presenter Fees
- Summer School (list dates of the summer school)
- Multi-year license or subscription are allowed



# Writing & Spending Your Grant

## Expenditures NOT Allowed:

- Expenditures for students with 504 plans
- Cost for nonpublic special education residential and day programs



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# Reporting

## Expenditure Report:

- Submitted on quarterly basis
- Expenditures should be cumulative
- Expenditures must be documented in general ledger and be approved in the grant budget pages
  - Be sure that the account codes match



# Reporting

## Periodic Grant Reporting:

- Submitted on a yearly basis
- Document amount spent on professional development
- Show off your programs and success



# Medicaid - Free Care

Historically, Medicaid only paid for health services included in an IEP/IFSP of a student enrolled in Medicaid. A 2014 change in federal CMS policy provided an opportunity to expand school-based services to ALL Medicaid-enrolled students. This is known as Free Care Policy Reversal and requires Illinois to submit a State Plan Amendment (SPA) to The Centers for Medicare & Medicaid Services (CMS) to remove restrictions in the Medicaid state plan.



# Medicaid - Free Care Proposed Timeline

- **Notice of SPA:** Posted April 9th ([view here](#))
- **Effective date of SPA:** July 1, 2021
- **LEA Handbook changes:** July 1, subject to CMS approval of SPA
- **Training for District LEA staff:** Now?



# Medicaid - Cost Settlement

- Cost Settlement is a process that calculates the “True/Complete” cost that a LEA incurs for providing Medicaid Eligible services to qualified Medicaid Eligible Students
  - This process has been used in hospitals and other medical facilities
  - Currently 21 states use this methodology as part of their School-Based Fee-for-Service program across the country
  - The process still requires regular submission of direct service claims and payments to LEAs
- A LEA specific “cost settlement” amount is calculated each year

**HFS anticipates an estimated annual increase of \$12-\$18 million  
in federal matching funds for Illinois LEAs**



# Where to Start!

- **Collaborate with Special Education!** Set up recurring meetings to discuss these items (medicaid, Claims, etc...)
- **Medicaid - Contact your third party provider** and schedule a mtg to review the 3790B report. See slide on that. Create a plan to start to maximize Medicaid.
- **Medicaid - Identify 1:1 Aides for medicaid eligible IEP'd students.** Start there... GO BACK 18 months! Use student attendance data and begin to manually bill. (Work with your 3rd party provider) - Private facility 1:1's can be claimed too!
- **Medicaid - Admin Outreach - Do the webinar! Work with your 3rd party provider** and make sure all eligible positions are entered!
- **Review/audit your private facility invoices!** Make sure you are not overpaying. (Regular rate versus the intensive rate) - double check all intensive rate invoices to ensure the student has a 1:1 aide.
- **Claims - Work with Sped** to set up a calendar to review and assist with all Sped claims.
- **Contact any of us** if you have questions!



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# Opportunity, Questions, & Answers

*We thank you for your time!*



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# Presenters:

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