



Reviewing a Year of Progress and What's on the Horizon: Increasing Access to Medicaid School-Based Services (SBS)

Thursday, September 19, 2024

3 p.m. to 4 p.m. ET | 2 p.m. to 3 p.m. CT | 12 p.m. to 1 p.m. PT



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Baltimore, MD 21244



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Welcome Back to a New School Year!



Agenda

- ▶ Welcome
- ▶ Objectives
- ▶ Overview of the Technical Assistance Center (TAC)
- ▶ Medicaid School-Based Services (SBS) Grants and Current Progress
 - ▶ State Panel with Alaska and Oregon
- ▶ Upcoming TAC Events and Reports
- ▶ Questions, Conclusion, and Adjournment
- ▶ Resources



Objectives

- ▶ This webinar is intended to provide an overview of State progress toward increasing access to Medicaid SBS.
- ▶ This webinar will:
 - ▶ Review milestones from the past year.
 - ▶ Describe the TAC resources available to help States understand various topics in Medicaid SBS.
 - ▶ Describe how Medicaid SBS is currently delivered across the United States.
 - ▶ Identify the work of States in implementing and establishing SBS programs.
 - ▶ Identify forthcoming TAC events and resources aimed to support States.



Welcome from CMS!

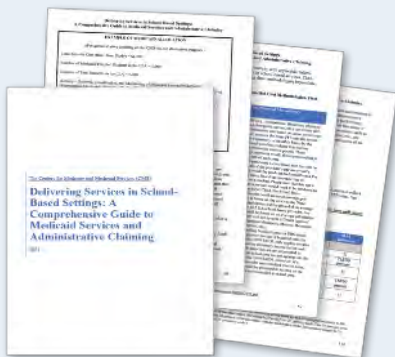
The Bipartisan Safer Communities Act (BSCA)

On June 25, 2022, President Joe Biden signed the BSCA into law.

BSCA Section 11003

The Centers for Medicare & Medicaid Services (CMS) collaborated with the U.S. Department of Education (ED) to release guidance related to Medicaid SBS:

1. 2023 Comprehensive Guide to Medicaid Services and Administrative Claiming.
2. An accompanying CMS Informational Bulletin (CIB).



Increase access to Medicaid-funded school-based health services, including mental health services.

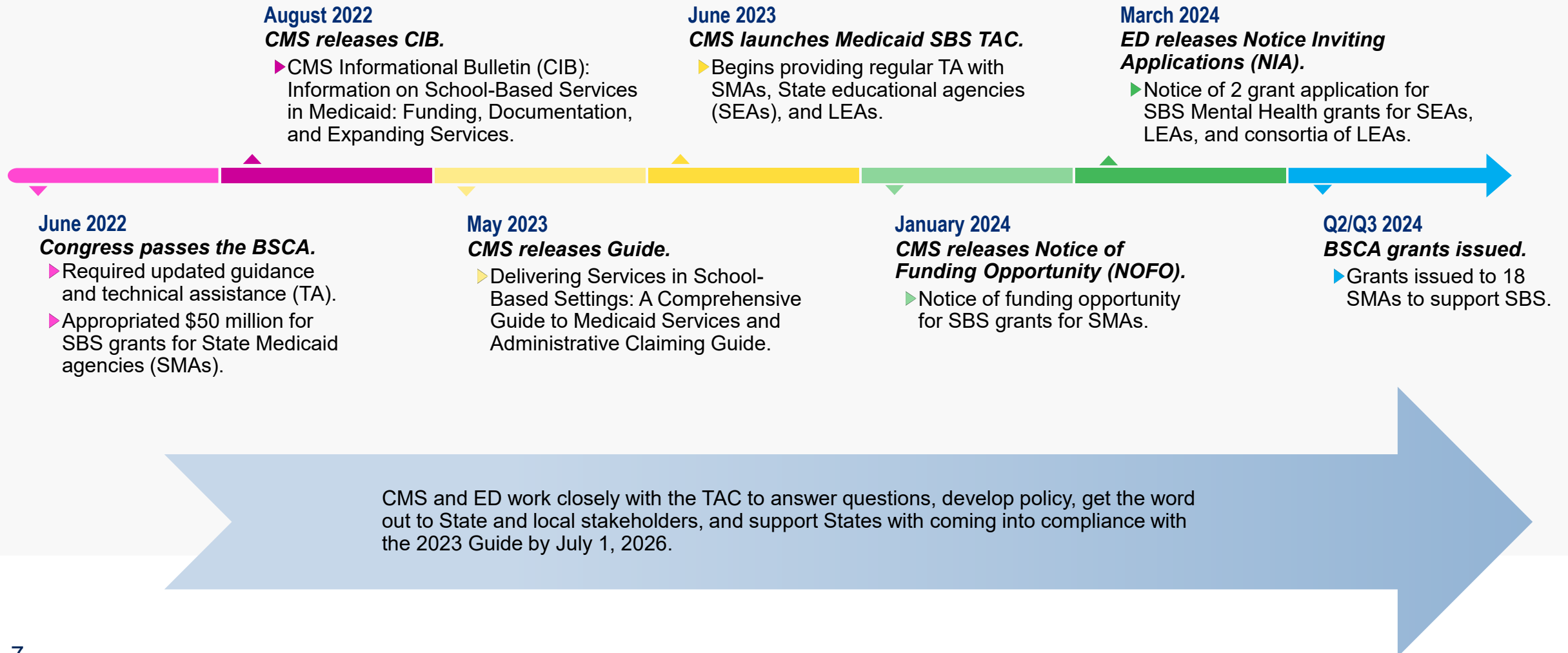
Reduce administrative burden.

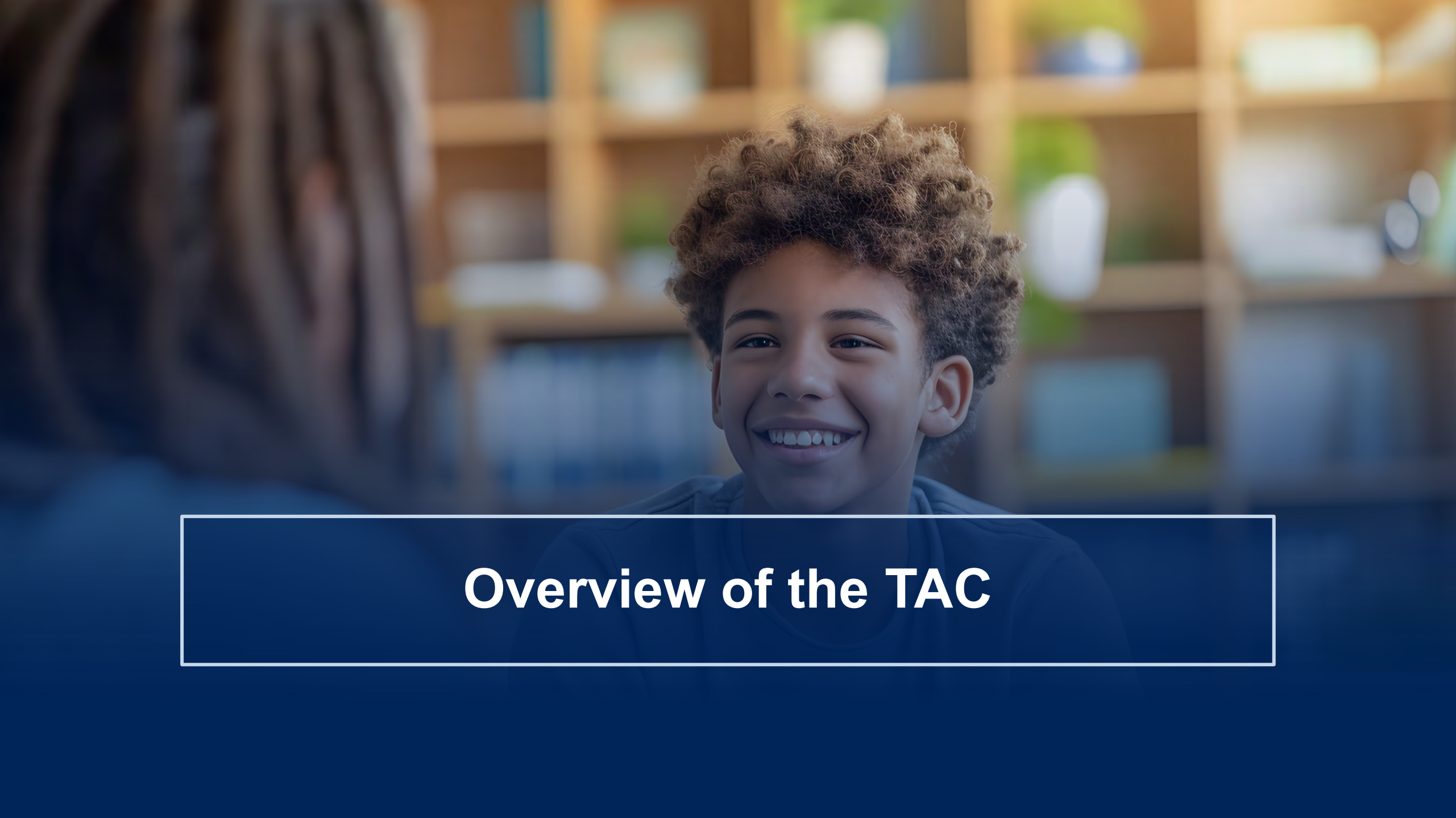
Support Federal compliance with Individuals with Disabilities Education Act (IDEA) requirements.

Ensure ongoing coordination and collaboration between the U.S. Department of Health and Human Services (HHS) and ED.

Provide information to State and local educational agencies (LEAs) on how to utilize funding to ensure payment under Medicaid for assistance provided in SBS.

Milestones: Commemorating Anniversaries of the TAC and the BSCA





Overview of the TAC

Purpose of the TAC



- CMS and ED share a commitment to children and youth and work together with the TAC to ensure children have the health services and supports necessary to build resilience and thrive.
- The TAC seeks to assist and expand the capacity of SMAs, SEAs, LEAs, and school-based entities to provide greater assistance to Medicaid eligible children and youth in K–12 schools.

TA activities provided by the TAC include:



Convening large and small group stakeholder calls.



Developing specific resource materials.



Responding to questions via the CMS Medicaid SBS Mailbox.

Helping States Increase Access to SBS



CMS, ED, and TAC

Serving as a TA resource to support SMAs, SEAs, and LEAs **throughout the process** of increasing access to Medicaid SBS.



Interest in **expanding SBS** or **covering costs** for SBS services that must be provided.



New or updated **Federal and State program documentation** to guide SBS:

- State plan amendment (SPA).
- Cost report instructions.
- Payment methodologies.
- Time study methodologies.
- State-specific administration and direct service guidance.

Comprehensive Review and Analysis

Players and Stakeholders

- School staff and providers
- Parents and students
- SMAs, SEAs, and LEAs

Information Dissemination

Building Coalition



Increased access to Medicaid in schools.

2023–2024 TAC Accomplishments



A total of 1,045 contacts were sent 16 outreach messages, including webinar invitations and announcements.

Eight national webinars were held, reaching 1,294 SMA, SEA, and LEA attendees.

Five virtual meetings were held, reaching 731 attendees.

Fifty FAQs were posted on the CMS website.

Five resource documents were posted on the CMS website.

A total of 430 inquiries were submitted to the SBS Mailbox.

2024–2025: TAC TA

Webinars

- ▶ Getting Started with Medicaid SBS
- ▶ Medicaid Coverable and Administrative Services for Medicaid SBS
- ▶ Understanding Rate Setting and Cost-Based Interim Payment Methodologies for Direct SBS
- ▶ Primer for LEAs on Medicaid SBS
- ▶ Provider Billing for Mental Health Services Within Medicaid School-Based Services
- ▶ Promoting Mental Health and Well-Being in Schools: An Action Guide for School and District Leaders
- ▶ The Intersection of Medicaid Managed Care and School-Based Services

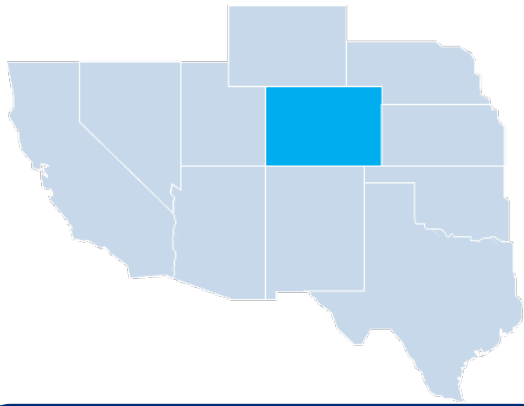
Virtual Meetings

- ▶ We Want to Hear from You
- ▶ Comprehensive School Mental Health Systems
- ▶ Digging into Challenges and Opportunities in Time Study Implementation Plans
- ▶ Fostering Program Integrity for School-Based Services – How SMAs Can Help LEAs with Compliance
- ▶ Introduction to the Readiness Checklist: A Comprehensive Tool to Assist with SBS SPA Submission and Compliance

Resources

- ▶ Understanding Cost Pools Job Aid
- ▶ How to Answer Random Moment Time Study (RMTS) Job Aid
- ▶ Reimbursement for Specialized Transportation within Medicaid SBS
- ▶ Medicaid SBS Federal Documentation Requirements for LEAs
- ▶ Considerations for Developing a Time Study Implementation Plan (TSIP)
- ▶ Medicaid SBS Readiness Checklist

Highlights From Previous State Panelists at TAC Events



Colorado SMA

Webinar: Understanding Rate Setting and Cost-Based Interim Payment Methodologies for Direct SBS

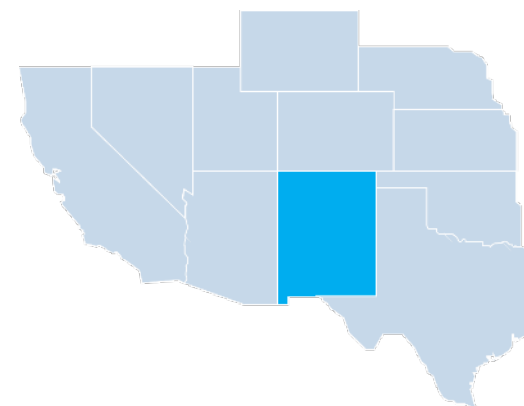
- Shared their experience developing a payment methodology.
- Discussed challenges/barriers experienced during the process and how they mitigated them.
- Provided advice to other States embarking on this work.



Massachusetts SMA & LEA

Virtual Meeting: Comprehensive School Mental Health Systems

- Discussed their efforts to leverage Medicaid to support student mental health, including:
 - Challenges in Medicaid claiming.
 - Potential for Medicaid SBS claiming in a school district.
 - Legislative advocacy.
 - Recommendations for readiness to claim Medicaid in schools.



New Mexico LEAs

Webinar: Primer for Local Education Agencies (LEAs) on Medicaid SBS

- Shared current services and billing practices within school districts.
- Shared the vision to increase student access to Medicaid SBS in school districts.
- Discussed factors/key decisions that led to successful implementation of Medicaid SBS in school districts.
- Discussed allotted roles to aid in schools implementing Medicaid SBS and in schools looking to increase Medicaid access.



Michigan SEA, Minnesota SEA, Colorado SMA & SEA

Webinar: Provider Billing for Mental Health Services within Medicaid SBS

- Shared State-specific efforts to support behavioral health services in schools.

Highlights From Previous State Panelists at TAC Events



Connecticut Provider

Webinar: Promoting Mental Health and Well-Being in Schools: An Action Guide for School and District Leaders

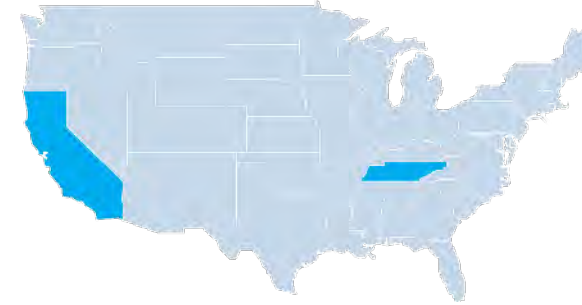
- Shared efforts to support mental health practices in schools and the community as a Licensed Clinical Social Worker, including:
 - Elements of a successful partnership with schools.
 - Strategies to reach schools with limited resources and how to promote them outside of school.
 - How schools can address the diverse needs of students and support parents.



Michigan SMA & LEA

Virtual Meeting: Fostering Program Integrity for School-Based Services – How SMAs Can Help LEAs with Compliance

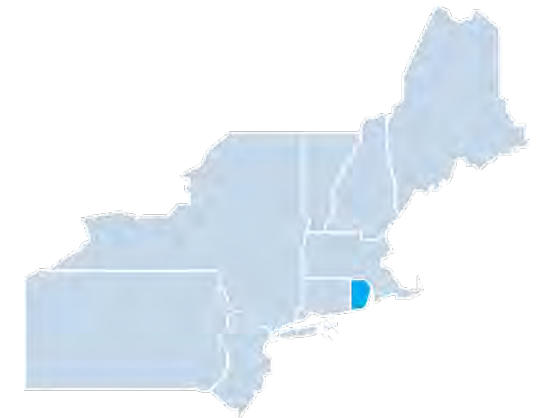
- Discussed key challenges, successes, and offered ideas for how SMAs, SEAs, and LEAs can work together to support program integrity for SBS, RMTS compliance, and service documentation compliance.



California SMA & Tennessee SMA

Webinar: The Intersection of Medicaid Managed Care and SBS

- Shared context on State's Medicaid managed care landscape and how it intersects with the delivery of SBS.
- Shared experience establishing relationships between LEAs and managed care plans (MCPs).
- Shared how to work with MCPs to improve quality metrics and how data on SBS factors into this.
- Discussed challenges/barriers in establishing and implementing processes and how to mitigate them.



Rhode Island SMA

Virtual Meeting: Introduction to the Readiness Checklist: A Comprehensive Tool to Assist with SBS SPA Submission and Compliance

- Shared the vision for the SBS program.
- Discussed who will use the SBS Readiness Checklist and how it will be used.
- Shared experience using the SBS Readiness Checklist and how they anticipate using it before, during, and after SPA submission.
- Shared suggestions for other States that may use the tool.



**Medicaid SBS Current State Progress
and Grants**

Current U.S. Landscape of Medicaid SBS Services

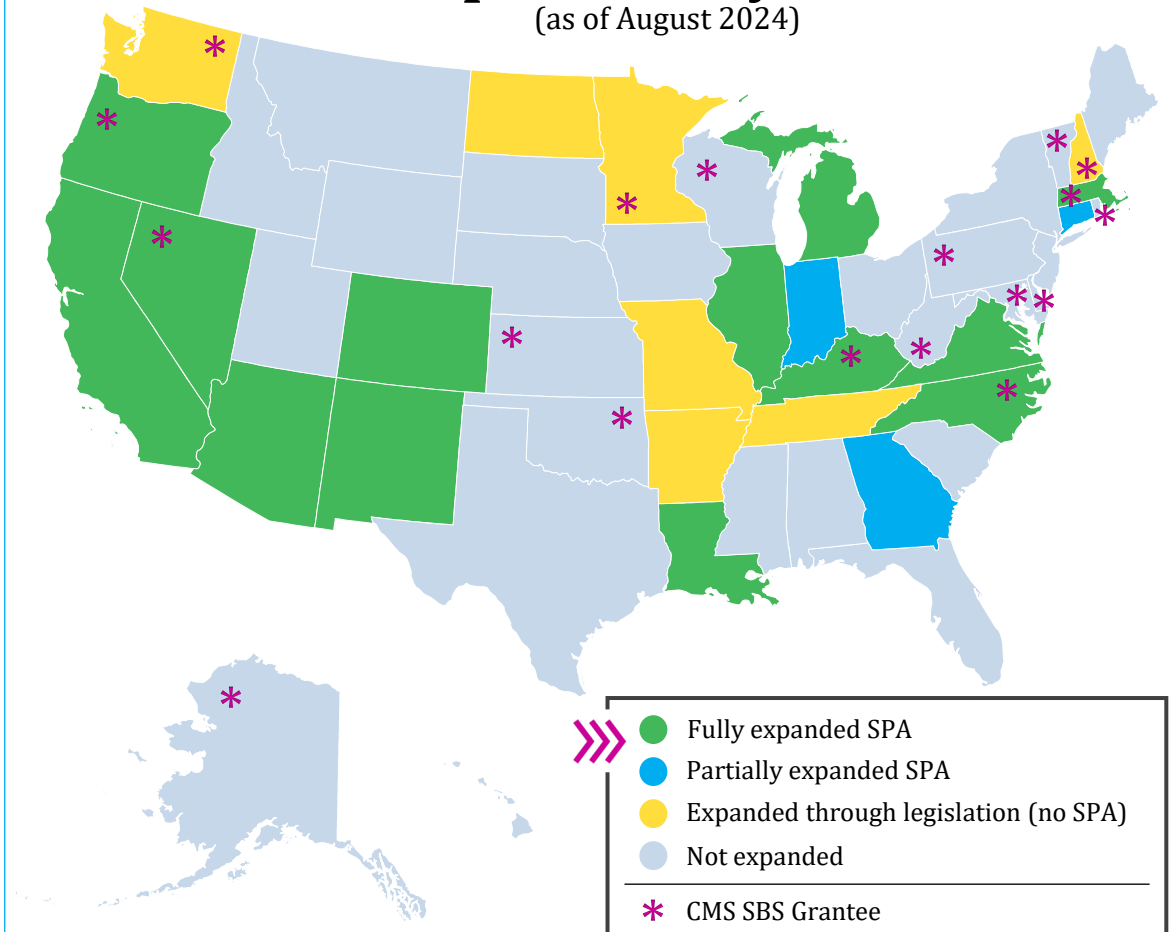
As of September 2024, 16 States have fully or partially expanded their Medicaid SBS programs beyond services provided through an Individualized Education Program (IEP) with a CMS-approved SPA.

- 13 States have fully increased access beyond IDEA to cover all medically necessary services.
- 3 States partially expanded to cover at least non-IEP service (e.g., nursing services, 504 plans)
- Medicaid SBS expansion has allowed these States to:
 - Bring in additional resources to expand access to health services for vulnerable students.
 - Address the increased demand for mental health services in schools.

Many States have not taken formal action to implement or align their State Medicaid plans, if necessary, with the 2014 Free Care State Medicaid Director Letter (SMDL).

Medicaid School-Based Services Expansion by State

(as of August 2024)



Purpose of the Medicaid SBS Grants

- BSCA section 11003(b) specifically stated:
 - “There is authorized to be appropriated \$50 million for fiscal year 2022 for the Secretary to award grants to States for the ***purpose of implementing, enhancing, or expanding the provision of assistance through school-based entities under Medicaid or [the Children’s Health Insurance Program (CHIP)].***”
- Funding is intended to allow States to build additional partnerships and coordination between SMAs and SEAs to improve the quality and delivery of care.
- Schools offer a unique opportunity to deliver healthcare services to children and youth, especially for the millions enrolled in Medicaid and CHIP.
 - From preventive and behavioral healthcare to physical care, among other benefits, Medicaid SBS offers families convenient care from trusted partners right where children learn and grow.
 - Such services also have a track record for advancing children’s health and improving educational outcomes.

Medicaid SBS Grant Types and Awardees

18 States were awarded grants.

Implementation Grantees

- ▶ Alaska
- ▶ Kansas
- ▶ Maryland
- ▶ Oregon
- ▶ Pennsylvania
- ▶ Rhode Island
- ▶ Vermont
- ▶ Washington
- ▶ West Virginia
- ▶ Wisconsin

Expansion Grantees

- ▶ Delaware
- ▶ Nevada
- ▶ New Hampshire
- ▶ North Carolina
- ▶ Oklahoma

Enhancement Grantees

- ▶ Kentucky
- ▶ Massachusetts
- ▶ Minnesota

State Panelists

Christal Hays, MS-SLP

State of Alaska, Department of Health, Anchorage
Project Coordinator for School-Based Services

Betsy Wood, MPA

State of Alaska, Department of Health, Juneau
Associate Director for the Office of Health Savings

Rusha Grinstead, MS, MPH

Oregon Health Authority
Medicaid Policy Manager

Jennifer Smith, MPA

Oregon Health Authority
SBS Lead and Grant Project Director

Panelist Questions

- ▶ Describe the progress your State has made in expanding Medicaid SBS.
 - ▶ Can you share more about how your State provides Medicaid SBS within rural school districts and Tribal schools/districts?
- ▶ What factors have contributed to your State making progress in pursuing Medicaid SBS expansion?
- ▶ What do you see as the greatest opportunity for your State and other States in expanding Medicaid SBS?
- ▶ What do you see as the greatest barrier to expanding Medicaid SBS?
- ▶ Is there any advice you can provide to other State Medicaid or education leaders about the Medicaid SBS journey?





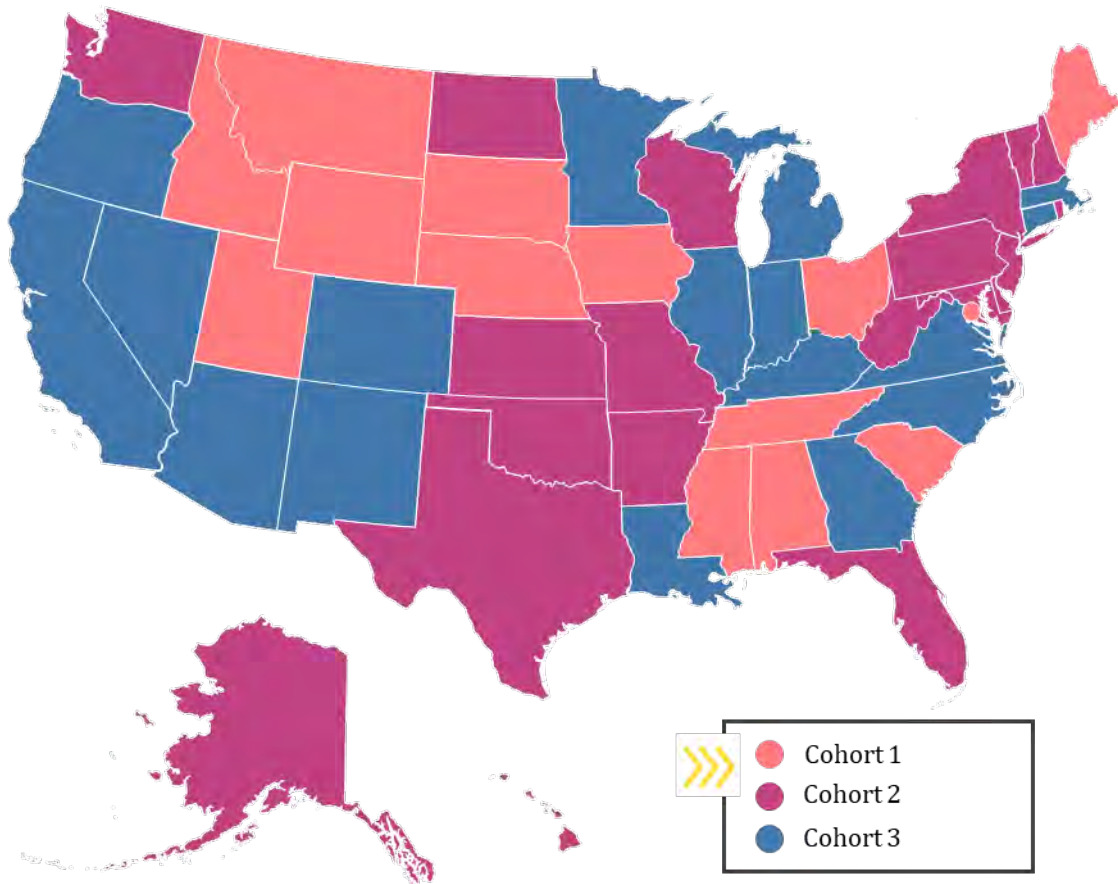
Upcoming TAC Events and Reports

Forthcoming State Cohort Meetings – Purpose

States that have similarly aligned expansion status regarding their efforts to increase healthcare to Medicaid children in schools have been grouped into three specific types of cohorts to learn how to advance efforts, receive assistance from the Medicaid SBS TAC, and identify reasonable alignment targets.

Cohort 1	Cohort 2	Cohort 3
<ul style="list-style-type: none"> • Only cover IEP services. • Are not grantees. • Are not currently working on a SPA to expand SBS. • May have communicated with the TAC for other topics. 	<ul style="list-style-type: none"> • In the process of expanding SBS. • Includes most grantees who received Implementation or Expansion grants. • Let the TAC know they are interested in expansion or have passed State legislation to expand SBS. 	<ul style="list-style-type: none"> • Have an approved SPA to expand SBS beyond IEP/IFSP services. <p>OR</p> <ul style="list-style-type: none"> • Have partially expanded to include services in 504 plans or other types of services.
October 29, 2024, 2PM EST	October 22, 2024, 1PM EST	October 23, 2024, 1PM EST

Forthcoming State Cohort Meetings – State Assignments and Next Steps



What are next steps for States to prepare for State cohort meetings?

- Identify key State leaders/SMA personnel who set goals for SBS and are responsible for SBS policy.
- Ensure the TAC has all key personnel contact information to invite them to cohort meetings.
- Keep an eye out for additional TAC communication regarding cohort meetings.
- Reach out to the TAC Mailbox at SchoolBasedServices@cms.hhs.gov for any questions or concerns!

Forthcoming TAC Webinars

Webinar Name	Tentative Date*
Medicaid and CHIP Funding for School Preventive Behavioral Health Services	November 14, 2024
Implementing Mental Health Initiatives in Schools	January 16, 2025
Best Practices for Billing and Documentation for Common Medicaid SBS	February 13, 2025
Unique Needs of Frontier/Remote/Rural Communities and LEAs in School-Based Health	March 20, 2025
Children with Complex Health Care Needs (CCHCN) and Medicaid SBS	May 8, 2025

* Dates are subject to change.

Forthcoming Resource Topics



In addition, the Medicaid SBS TAC will be producing a number of resources based on our understanding of what States need at this time. These include the following:

- ▶ Explaining Medicaid SBS (Video)
- ▶ Medicaid SBS 101 Quick Guide
- ▶ Interagency Agreements for State Educational Agencies
- ▶ Parental Consent/Data Sharing
- ▶ Update of Readiness Checklist

Forthcoming Biennial Report

The BSCA requires the TAC to report biennially to the HHS Secretary.

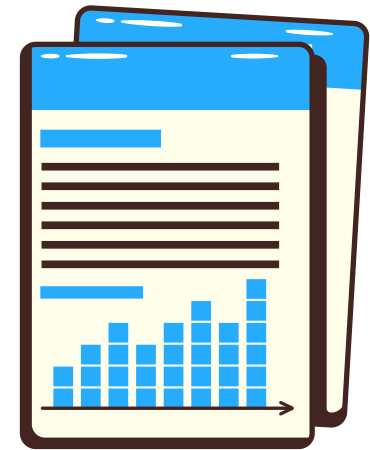
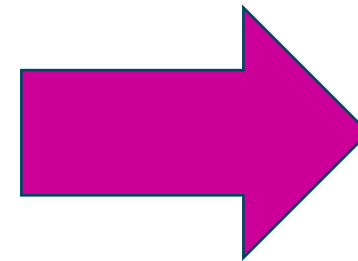
Provide an overview of TAC activities.

Summarize issues encountered and resolutions.

Analyze information gathered about Medicaid SBS implementation by State and identified trends.

Support outcomes with quantitative and qualitative data.

Identify impacts and expected outcomes from activities.



Biennial Report

The Biennial Report will include measures that are intended to enable the Secretary and Congress to understand the activities delivered by the TAC and the areas where most assistance was requested.



Questions?

Email: SchoolBasedServices@cms.hhs.gov



Resources

- ▶ [Technical Assistance Center \(TAC\) | Medicaid](#)
- ▶ [Past Events | Medicaid](#)