

Medicaid Cost Reporting & Claiming System User Guide

August 2012

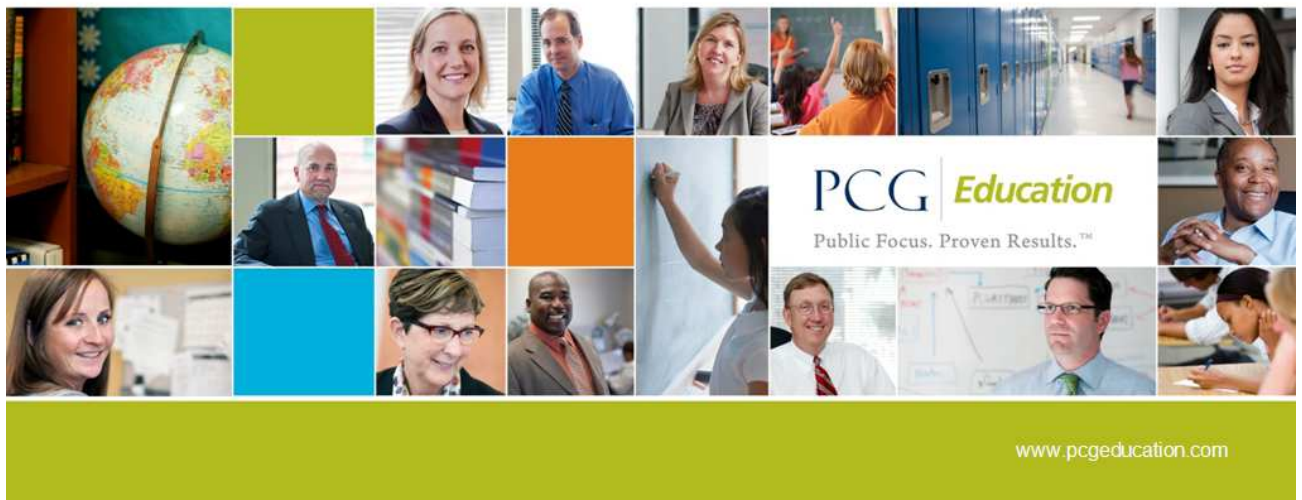


Table of Contents

- Overview – page 2
- Logging In – page 3
- Dashboard – page 4
- Managing Contacts – page 5
- Quarterly Financial Submission and Certification – page 9
- Importing/Exporting Data – page 14

Overview

The U.S. Department of Health & Human Services' Centers for Medicare & Medicaid Services (CMS) requires States to demonstrate that rates paid for school-based services are no higher than the actual cost of providing medical services. All Pennsylvania LEA's participating in the School Based Access Program must comply with these requirements to retain reimbursement, one of which is the submission and certification of financials.

Districts must submit financial information for each participant included in the reporting quarter's Staff Pool List (SPL). Data is submitted and certified via the Medicaid Cost Reporting & Claiming System (MCRCS). This guide walks you through the MCRCS and provides instructions for how to log in, manage contact information, add and edit financial data, import/export data, and finally, how to certify your report.

Logging In

Accessing the MCRCS

The Medicaid Cost Reporting and Claiming System (MCRCS) is the secure, online system for the PA SBAP quarterly financial reporting.

- To access the MCRCS, open an internet browser and enter the following URL:
- <https://costreporting.pcgus.com/Default.aspx?ReturnUrl=%2fpa>

Credentials

- User Name will be your email address
- If your LEA is new to PA SBAP and no contacts at your district have been set up in the system, please email SBAPsupport@pcgus.com to activate your account.

PCGHealth™
Medicaid Cost Reporting and Claiming System

User Name:

Password:

If you forgot your password please click here: [Forgot Password](#)

If you are having trouble accessing your account for any other reason, please call 1-877-395-5018.
(Monday - Friday 8.00am to 5.00pm ET)

Welcome to the New Jersey Medicaid Cost Reporting and Claiming System
Please log in to begin your cost report.

Helpful links:

- [Cost Settlement Overview](#)
- [Dept of Treasury Memo - Cost Settlement and SEMI Waivers](#)
- [SEMI Provider Handbook](#)

Note: If you forget your password, click on the “Forgot Password” link (indicated by the red arrow above). You will be prompted to type in your User Name, and then asked to respond to a security question. Once you correctly answer the security question, the MCRCS will automatically reset and email you the new password.

Dashboard

Upon logging in, you will be directed to the MCRCS Dashboard.

PCGHealth™
Medicaid Cost Reporting and Claiming System

Welcome f.babury1@gmail.com
Logout

Demo Quarter District

Dashboard | Quarterly Financial Submission | Manage Contacts

DASHBOARD

Welcome to the New Jersey Medicaid Claiming & Cost Reporting System. You have logged in successfully.
Below on the Dashboard, you will find various important submission dates and resources. Also, please see the *Training Information* section as it provides all the dates and times that any user can receive trainings for this system. You can download all of the training materials from this page as well.

If you need any assistance with the system please refer to the *Medicaid Cost Reporting & Claiming System User Guide* found in the *Training Resources* section. If you need assistance with quarterly cost reporting, please call 1-877-395-5018.

IMPORTANT DATES & RESOURCES	TRAINING INFORMATION
<p>Submission Dates 2011-2012 School Year</p> <p>April - June Quarterly Financial Submission (04/01/12-06/30/12)</p> <ul style="list-style-type: none"> Opens 07/02/12 Closes 08/17/12 	<p>Upcoming Training and Meeting Dates</p> <p>Quarterly Financial Trainings:</p> <ul style="list-style-type: none"> Quarterly Financial Trainings (Beginner): July 5th - 12pm July 24th - 11am MCRCS System Trainings:

The navigation bar at the top allows you to switch between sections in the MCRCS:

- Dashboard – Provides information and training resources
- Quarterly Financial Submission – Used for financial report data entry, review, and certification
- Manage Contacts – Add, edit, and inactivate MCRCS users

At the bottom of the dashboard, you will find two sections: Important Dates and Resources on the left and Training Information on the right. Here you will find information and resources that will guide you through the financial certification process.

Managing Contacts

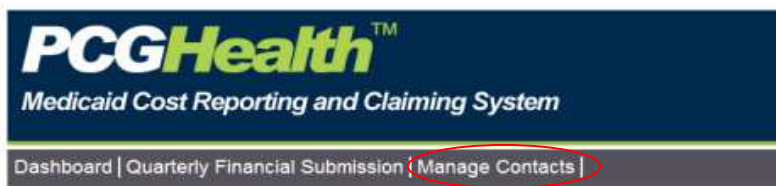
Each District Administrator is responsible for managing their district’s user accounts, user permissions, and contact information. At the beginning of each quarter, please review district user data in the MCRCS and ensure the information is up to date.

Adding New Users

Once logged in, the District Administrator is able to add users to the MCRCS.

- When adding users, consider who in the district will be submitting data, who needs to receive related correspondence, and who will be responsible for certifying financial submissions.

To add a new user, click on the “Manage Contacts” tab on the navigation bar. This directs you to the “District Contact List” page where you can create a new user.



District Contact List

The screenshot shows the 'District Contact List' page. At the top, there are three buttons: 'Create New User', 'Show Inactive Users', and 'Hide PCG Users'. A red arrow points to the 'Create New User' button. Below these buttons is a form for adding a new user. The form fields are: Name: FarhadTest BaburyTest, District: Demo Quarter District, Email: f.babury1@gmail.com, Title: (empty), Address1: (empty), Address2: (empty), City/State/Zip: , NJ, Tele 1: (201) 555-5555, Tele 2: (empty), Fax: (empty), and UserLevel: District Admin. At the bottom of the form are two buttons: 'Inactivate User For This District' and 'Edit User Info For This District'.

Click on the “Create New User” button at the top of the page.

Once you are in the “Create New User” page, enter all required information and click on the “Create User” button at the bottom of the screen. Required information includes name, email address, title, address, city, state, telephone number, and user level.

Assigning User Roles


When creating a new user, you must assign them a “User Level”. The MCRCS has three levels of access for Users:

1. Report Viewer
 - Can only view information;
 - Cannot add, delete, or edit information.
2. Report Editor
 - Can add, delete, or edit information.
3. District Administrators
 - Same basic functionality as the Report Editor:
 - Can add, delete, or edit information.
 - Can “manage” district contacts:
 - Allows you to add, delete, or edit contact information.
 - Can certify the quarterly financial submission.
 - Note: Because only District Administrators can certify reports, each district must designate at least one staff member with this User Level.

When you have entered the user contact information, you will then select their User Level. Click on the “User Role” drop-down and select “District User”. This will automatically populate a district level settings feature at the bottom of the screen:

User Role:

Click "Change" to edit district level settings. When all selections are made, click "Create User" at bottom of page.

	District	Role	Activity Status	Quarterly Submissions	Medicaid Cost Reports
 <input type="button" value="Change"/>	<input type="checkbox"/> Demo Quarter District		<input checked="" type="checkbox"/> Active	Hidden	Hidden

Click on the “Change” button to assign a user type. Once you do this, District, Role, Activity Status, Quarterly Submissions, and Medicaid Cost Reports columns will be available for editing. Check off your district’s name in the district column. Then select the user level by clicking on the “Role” drop-down field, which will display the three user types described above.

Click “Change” to edit district level settings. When all selections are made, click “Create User” at bottom of page.

	District	Role	Activity Status	Quarterly Submissions	Medicaid Cost Reports
<input type="button" value="Cancel"/>	<input type="checkbox"/> Demo Quarter District	District Admin <div style="border: 1px solid black; padding: 2px;"> District Admin Report Editor Report Viewer </div>	<input checked="" type="checkbox"/> Active	<input type="button" value="Select All"/> <input checked="" type="checkbox"/> 07/01/2011 through 09/30/2011 <input checked="" type="checkbox"/> 10/01/2011 through 12/31/2011 <input checked="" type="checkbox"/> 01/01/2012 through 03/31/2012 <input checked="" type="checkbox"/> 04/01/2012 through 06/30/2012 <input checked="" type="checkbox"/> 04/01/2012 through 06/30/2012 A.1 <input checked="" type="checkbox"/> 04/01/2012 through 06/30/2012 A.2 <input checked="" type="checkbox"/> 04/01/2012 through 06/30/2012 A.3	<input type="button" value="Select All"/> <input checked="" type="checkbox"/> 2012

The “Activity Status” column will be marked off by default, as will each of the quarters. You can edit this information as well at any time.

Once you are finished, click on the “Create User” button at the bottom of the page and the user will be added to the MCRCS.

Edit User Information

In addition to adding new users, you can also edit user information. To do this:

- Click on the “Manage Contacts” tab on the navigation bar.
- Click on the “Edit User Info For This District” button at the bottom of the page to update contact information.



District Contact List

Buttons:

Name: FarhadTest BaburyTest
District: Demo Quarter District
Email: f.babury1@gmail.com
Title:
Address1:
Address2:
City/State/Zip: , IU
Tele 1: (201) 555-5555
Tele 2:
Fax:
UserLevel: District Admin

This will open all of the fields and allow you to edit all information. Once you are finished updating all fields, click on the “Save Changes” button at the bottom of the screen to save your new user information updates.

Important Notes:

- Contacts must be entered and maintained by the district.
 - Keep contact information up to date.
- Districts must have at least one District Administrator contact type.
 - PCG recommends that each district also have at least two active contacts, in addition to the District Administrator.

Quarterly Financial Submission and Certification

To begin the certification process, click on the “Quarterly Financial Submission” tab on the navigation bar. This directs you to the “Quarterly Financial Submission Steps” section of the MCRCS:

PCGHealth™
Medicaid Cost Reporting and Claiming System

Welcome f.babury1@gmail.com
Logout

Demo Quarter District ▾
01/01/2012 through 03/31/2012 ▾

Dashboard: **Quarterly Financial Submission** | Manage Contacts |

Quarterly Financial Submission Steps

- Quarterly Payroll Information
- Quarterly Other Costs
- Direct Support Staff Costs
- Tuition Costs
- Quarterly Edits
- Quarterly Certification

In Process: Information has been entered for this report. Once all the information has been reported and any Edits have been resolved or explained, the report can be completed/certified.

Public Focus. Proven Results.™

You will need to review each section, starting first with “Quarterly Payroll Information” and ending with “Quarterly Edits” to ensure your submission is correct. Finally, you will click on “Quarterly Certification” to certify that the report is accurate and complete.

Prior to each quarterly financials deadline, the MCRCS will be pre-populated with data from the Random Moment Time Study (RMTS) System, the system used by districts to submit and certify their staff pool list. Each quarterly submission should include only payroll costs for staff listed (or who replaced someone listed) on the staff pool list for the applicable reporting period.

Note: The status circle at the bottom of the page indicates your district’s certification status:

- A red circle indicates that your district has “Not Started” and no data has been updated;
- A yellow circle indicates that your report is “In Process” and has not yet been certified; and
- A green circle indicates that your report is “Certified”.

Before you begin entering data, you must first select the appropriate calendar quarter from the drop down at the top right of the page.

After selecting the appropriate quarter, you can begin entering costs for each section:

- Quarterly Payroll Information – report of all costs paid, specifically salary and benefit information, to the participant.
- Quarterly Other Costs – report of materials, supplies, travel, and other costs incurred in the delivery of applicable health-related services provided by staff on the staff pool list.
- Direct Support Staff Costs – report of all costs paid, specifically salary and benefit information, to participants that support a staff person that is listed on the Staff Pool List for a percentage of their time (SEMI Coordinators and secretarial staff would fall into this category).

Quarterly Edits

Once you have entered payroll information, the MCRCS will analyze your data and review it for accuracy. The system is programmed with edit checks which will identify outliers or potential errors in the data. Errors must be corrected (or an explanation must be entered in the MCRCS) prior to certifying your quarterly financial submission.

Medicaid Cost Reporting and Claiming System 01/01/2012 through 03/31/2012

Dashboard | Quarterly Financial Submission | Manage Contacts |

[← Return To Report List](#)

Quarterly Edits

Edits Need Resolution: Below you will find one or more Edits that have been found with regard to the costs you have reported. These Edits are designed to ensure that you are submitting accurate information. Please resolve these issues by either correcting the amount of costs reported or providing a reason in the explanation field as to why the information is correct as reported. You will need to resolve each of these Edits before you will be able to certify this quarterly report.

Records Per Grid: 10

No Payroll Information Reported
 There were no costs submitted for the names listed below. If the person worked for the district during the reporting period or was replaced by someone who worked during the reporting period, report the applicable payroll costs. If the person did not work for the district during the period and/or was a duplicate entry, provide an explanation in the "Explanation" column. (i.e. "Retired" or "Did not work for district during this time period")

	Last Name	First Name	Job Category	Staff Employment Status	District Job Title	District Employee ID	Paid Hours	Salaries	Health Insurance	Life Insurance	Retirement	Social Security	Other Employee Insurance	Other Employee Benefits	Contracted Staff Costs	Compensation Federal Revenues	No Payroll Explanation
Edit	Adamski	Chas	Speech-Language Therapist (DS)	Full Time	Speech-Language Therapist (DS)		0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	OOD Provider
Edit	Aguayo	Silas	Speech-Language Therapist (DS)	Full Time	Speech-Language Therapist (DS)		0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	retired

There are three levels of edit checks in the system:

- **Level 1**
 - Will not allow you to save the information when entering directly into MCRCS.
 - An error message will appear, describing the error and how to correct it.
- **Level 2**
 - An edit that is outside expected values.
 - The MCRCS will allow an explanation to be entered and saved.
- **Level 3**
 - This type of entry is not allowed in the MCRCS.
 - It must be corrected before certification occurs.

Level 2 and Level 3 edits will appear under the Quarterly Edits link for review.

Common Errors

Common errors identified by the MCRCS include:

- Salaries or contracted compensation in excess of \$25,000 for a quarter.
- Benefits in excess of \$15,000 for a quarter.
- Federal funding for staff that exceeds the amount of reported payroll costs for that staff.

If a common error is identified in your data, make necessary revisions to resolve the issue; alternatively, if the data is correct, provide a written explanation as to why the reported information is accurate. PCG will follow-up with each district if the explanation does not clearly explain why the edit flag occurred.

Certification

When you have completed entering your data and corrected all edits, click on the “Quarterly Certification” link under the “Quarterly Financial Submission Steps” to certify your report.

PCGHealth™
Medicaid Cost Reporting and Claiming System

Welcome f.baburyf@gmail.com
Logout

Demo Quarter District
01/01/2012 through 03/31/2012

Dashboard | Quarterly Financial Submission | Manage Contacts |

Quarterly Financial Submission Steps

- Quarterly Payroll Information
- Quarterly Other Costs
- Direct Support Staff Costs
- Tuition Costs
- Quarterly Edits
- Quarterly Certification**

In Process: Information has been entered for this report. Once all the information has been reported and any Edits have been resolved or explained, the report can be completed/certified.

Public Focus. Proven Results.™

This page allows you to conduct a final review of your quarterly financial report submission. Once you have reviewed and confirmed that the information is accurate and complete, scroll to the bottom of the page and click on the “Certify Quarterly Financial Submission” button to certify your report.

[Certify Quarterly Financial Submission](#)

This will officially certify your report! Once you have successfully certified, the status circle will

become green:  **Certified:**

Your report is now locked from being edited. If, after final certification, the district realizes that changes are needed, please contact PCG at SBAPsupport@pcgus.com.

Note: For content-related questions about what type of data to enter, please attend an online training. Updated training information is found on the MCRCS Dashboard. Additionally, you can email your client representative or the PA SBAP team at SBAPsupport@pcgus.com.

Importing/Exporting Data

One of the most helpful features of the MCRCS is the ability to import/export data. This will help you input your financial data more efficiently. The import/export feature utilizes Microsoft Excel™. Districts can use this feature to organize their data in a spreadsheet and then import and upload the updated information back into the MCRCS as a comma separated values (CSV) file.

The Import/Export buttons are available at the bottom of the following sections of the MCRCS: Quarterly Payroll Information, Direct Support Staff Costs, Tuition Costs, and Quarterly Edits.

Edit	Altenhofen	Dee	Speech-Language Therapist (DS)	Direct Service	Full Time	Speech-Language Therapist (DS)	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
Edit	Alvin	Clayton	Speech-Language Therapist (DS)	Direct Service	Full Time	Speech-Language Therapist (DS)	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.

Records 1 to 10 of 93 records



To export data, click on the “Export” button:

- You will be prompted to confirm that you want an export: click on the Export button to obtain the extracted data in a CSV file.
- You will be asked to Open or Save the file.
 - PCG recommends that the file be saved to your desktop so it can be easily found.
- Open the file using a spreadsheet application, such as Microsoft Excel™.

Once you have opened the spreadsheet, your screen should look like this:



Click the Export button to export SalaryAndBenefitsData in .csv format.

[Export](#) [Click Here To Return](#)

	A	B	C	D	E	F	G	H	I	J
1	rowid	crvf_last	crvf_first	crvf_job_crsf_staff	crvf_cost	crsf_distri	crsf_distri	crmf_paid	crmf_salar	crmf
2	1070437	Aaronson	Abram	Speech-La Full Time	Direct Ser	Speech-Language Th		101	0	
3	1070438	Abney	Avery	Speech-La Contracto	Direct Ser	Speech-Language Th		0	0	
4	1070439	Acierno	Jayson	Speech-La Full Time	Direct Ser	Speech-Language Th		0	170000	
5	1070440	Adamski	Chas	Speech-La Full Time	Direct Ser	Speech-Language Th		0	0	
6	1070441	Aguayo	Silas	Speech-La Full Time	Direct Ser	Speech-Language Th		0	0	
7	1070442	Ahlers	Lane	Speech-La Full Time	Direct Ser	Speech-Language Th		0	0	

Updating Exported Data

Once you have exported the Excel document to your desktop and have it open, you can enter or edit the salary and benefit information on the spreadsheet.

Important Notes:

- Do not change any formatting or the column headers, as it will cause the upload to fail.
- Do not format any of the cells as 'currency' or 'date' fields.
 - For currency, enter decimals only and exclude currency symbols or commas.
- Once all edits are complete, save the file as a comma separated values, or CSV, file.

Importing Updated Data


Once you have completed your edits, you can now import the spreadsheet back into the MCRCS. To import a file:

- Return to the page where you want to import the data and click on “Browse”.
- Select the updated CSV file that should be imported.
- Click on the “Import” button.

Edit	Altenhofen	Dee	Speech-Language Therapist (DS)	Direct Service	Full Time	Speech-Language Therapist (DS)		0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
Edit	Alvin	Clayton	Speech-Language Therapist (DS)	Direct Service	Full Time	Speech-Language Therapist (DS)		0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.

1 2 3 4 5 6 7 8 9 10

Records 1 to 10 of 93 records



After you click on the “Import” button, the file will be uploaded to your MCRCS site, and your table will reflect all of the updated information.