

Creating a Culture of MAA/TCM



County of San Diego, Health and Human Services Agency

Public Health Services

SANDIEGOCOUNTY.GOV/HHSA



Introductions



Presenters



Venus Zayas
LGA Coordinator
County of San Diego



Ben Simsuangco
MAA Coordinator
County of San Diego



Dora Zeevaert
TCM Coordinator
County of San Diego

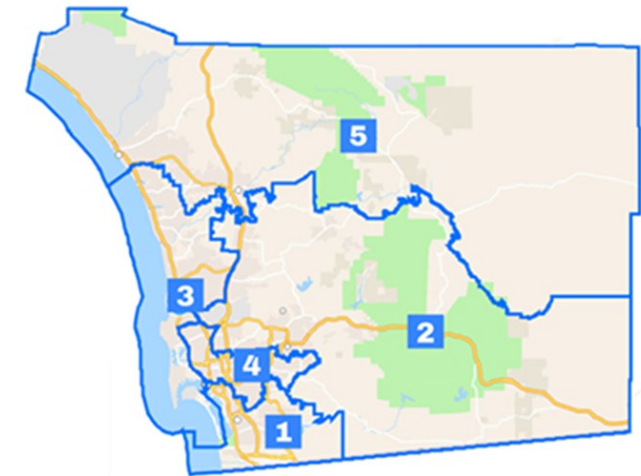


Elisa Mack
Program Specialist
HFA

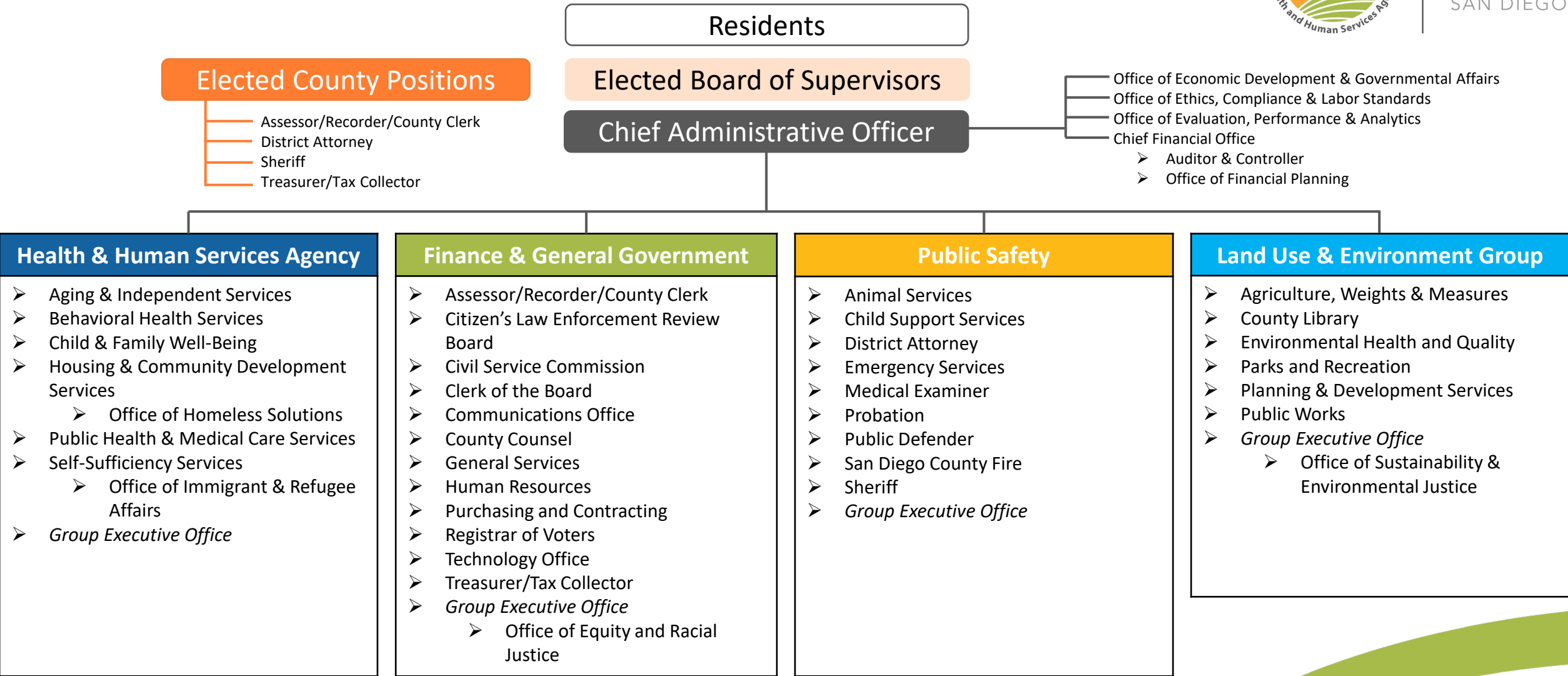
County of San Diego



- One of California's original 27 counties
- Covers 4,526 square miles, includes a mix of urban, suburban and rural areas... and a diverse landscape
- 2nd most populous county in California, and 5th in the USA, with 3.29 million residents
- Largest industry is GOVERNMENT!
- Includes 18 incorporated cities and unincorporated areas
- Divided into 5 districts, that were last adjusted in 2023
 - Represented by an elected Board of Supervisor
- Board of Supervisors are policy makers for the region



County of San Diego Organization



Elected County Positions

- Assessor/Recorder/County Clerk
- District Attorney
- Sheriff
- Treasurer/Tax Collector

Elected Board of Supervisors

Chief Administrative Officer

- Office of Economic Development & Governmental Affairs
- Office of Ethics, Compliance & Labor Standards
- Office of Evaluation, Performance & Analytics
- Chief Financial Office
 - Auditor & Controller
 - Office of Financial Planning

Health & Human Services Agency

- Aging & Independent Services
- Behavioral Health Services
- Child & Family Well-Being
- Housing & Community Development Services
 - Office of Homeless Solutions
- Public Health & Medical Care Services
- Self-Sufficiency Services
 - Office of Immigrant & Refugee Affairs
- *Group Executive Office*

Finance & General Government

- Assessor/Recorder/County Clerk
- Citizen's Law Enforcement Review Board
- Civil Service Commission
- Clerk of the Board
- Communications Office
- County Counsel
- General Services
- Human Resources
- Purchasing and Contracting
- Registrar of Voters
- Technology Office
- Treasurer/Tax Collector
- *Group Executive Office*
 - Office of Equity and Racial Justice

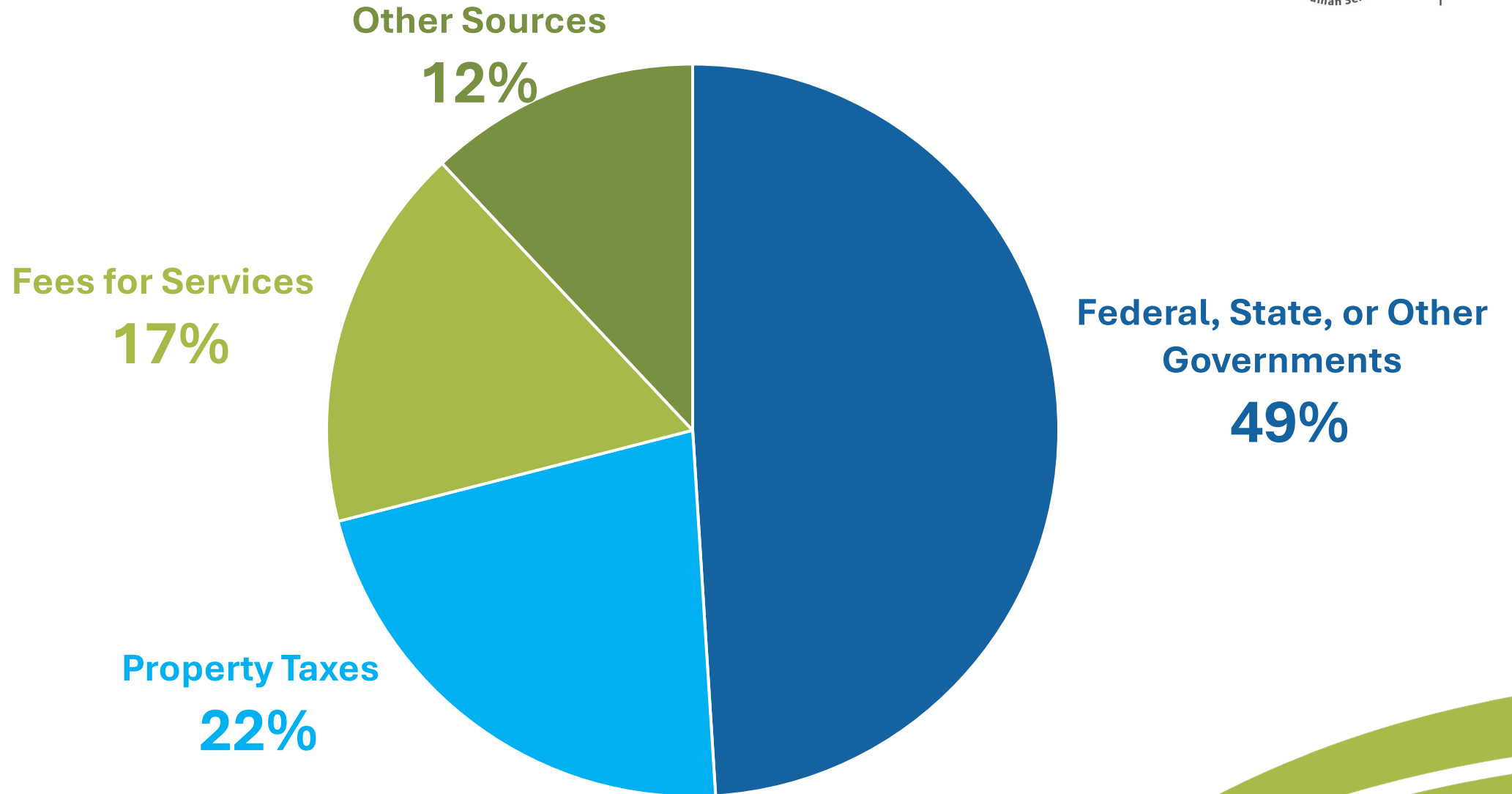
Public Safety

- Animal Services
- Child Support Services
- District Attorney
- Emergency Services
- Medical Examiner
- Probation
- Public Defender
- San Diego County Fire
- Sheriff
- *Group Executive Office*

Land Use & Environment Group

- Agriculture, Weights & Measures
- County Library
- Environmental Health and Quality
- Parks and Recreation
- Planning & Development Services
- Public Works
- *Group Executive Office*
 - Office of Sustainability & Environmental Justice

Where Does the County's Funding Come From?



County's Fiscal Year 2025-26 Budget

Total Adopted Budget: **\$8.63 Billion**



Local Governmental Agency (LGA)



- In Order to participate in MAA/TCM you must:
 - Have a contract with Department of Health Care Services (DHCS)
 - Have a contract with the Host LGA (County of Santa Cruz)
 - Become a member of the LGA Consortium
- Benefits of being part of the LGA Consortium
 - Ability to network with like Counties
 - Have access to Subject Matter Workgroups
 - Have access to assistance from the Host LGA
 - Invitation to the Annual Conference
 - Develop working relationships with DHCS on policy and program issues

Medi-Cal Administrative Activities (MAA)

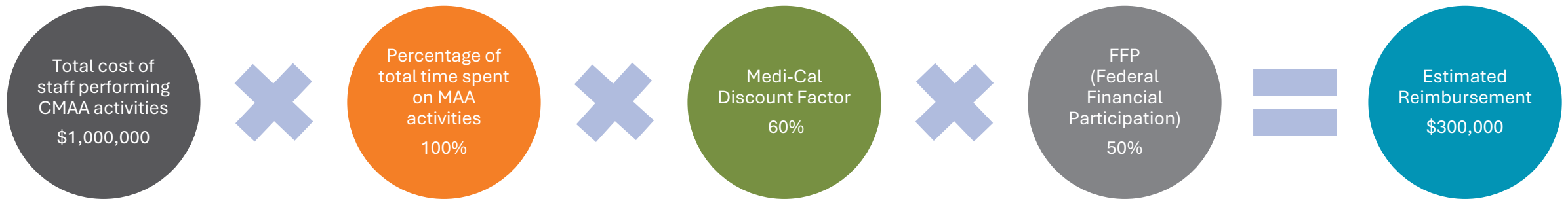


Purpose of the MAA Program

MAA allows participating LGAs to receive reimbursement from federal Medicaid for the cost of performing administrative activities that directly support efforts to identify and enroll potentially eligible individuals into Medi-Cal and Medi-Cal covered services.



MAA Reimbursement Calculation

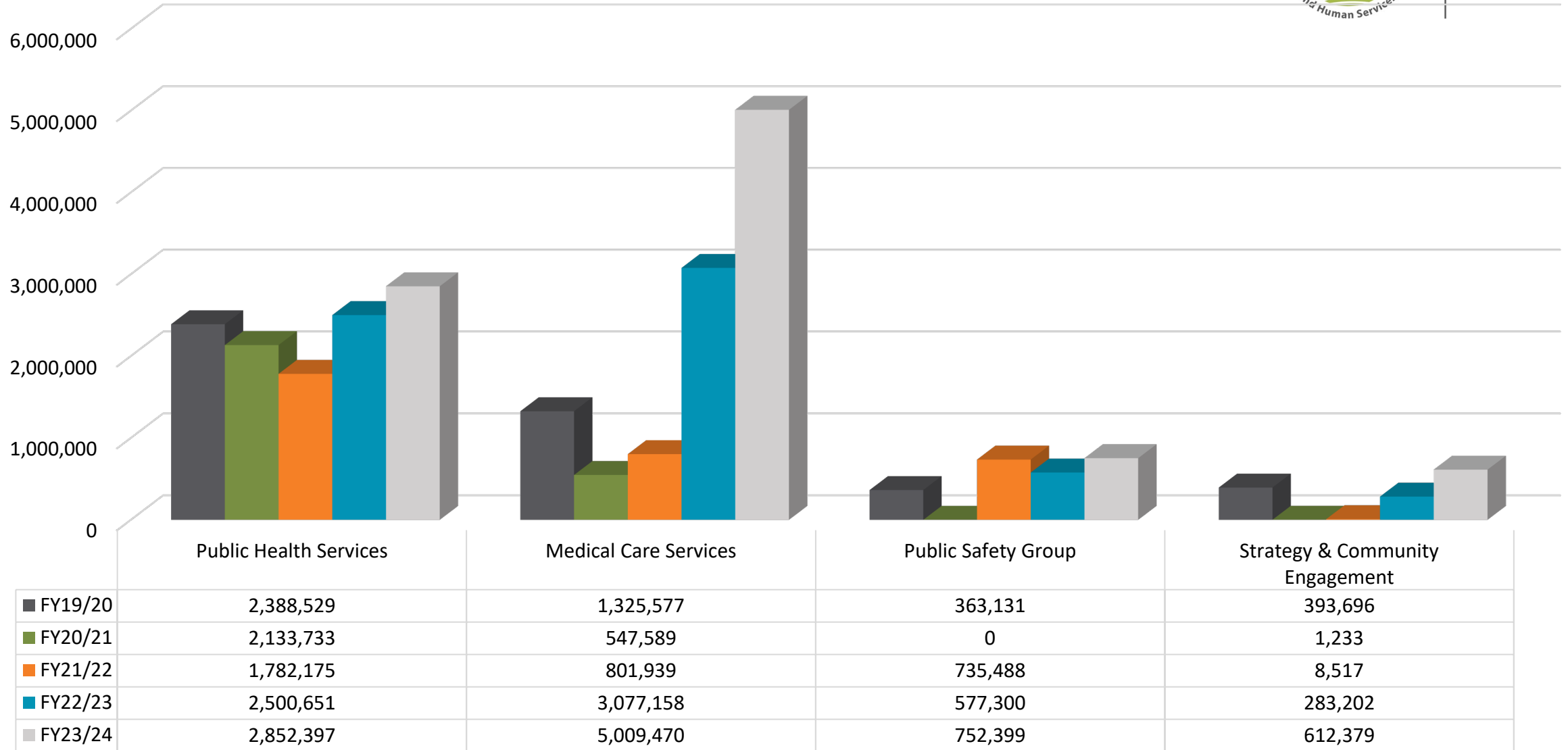


MAA Within the County of San Diego



County Departments	Participating Organizations		Scope
Public Health Services	<ul style="list-style-type: none"> • MAA/TCM • PHS Admin • Public Health Preparedness and Response • Immunizations • Border Health • California Children’s Services 	<ul style="list-style-type: none"> • HIV/STD/Hepatis Branch • Tuberculosis Program • Epidemiology • Vital Records • Maternal, Child, and Family Health Services 	<ul style="list-style-type: none"> • protects and promotes community health through prevention, education, and emergency response • focuses on disease prevention, reducing health hazards, promoting healthy behaviors, ensuring access to quality care, and supporting recovery during public health emergencies
Medical Care Services	<ul style="list-style-type: none"> • MCS Administration • Nursing • Pharmacy • SDAIM (CaAIM) 		<ul style="list-style-type: none"> • ensures access to high-quality, equitable, and evidence-based care through oversight, policy development, and direct service delivery • provides quality assurance, nursing and pharmaceutical services, and clinical guidance to support programs that improve the health and well-being of San Diego residents of all ages and populations
Public Safety Group	<ul style="list-style-type: none"> • Emergency Medical Services Administration • County Fire Information Technology, Emergency Medical Services • Probation • Sheriff’s Office 		<ul style="list-style-type: none"> • collaborate to protect and serve the community through prevention, emergency response, law enforcement, and rehabilitation services • provide essential functions such as client supervision and support, disaster coordination, public safety enforcement, court and detention services, and regional emergency and investigative operations
Strategy and Community Engagement	<ul style="list-style-type: none"> • Community Health Promotion 		<ul style="list-style-type: none"> • consists of communications, data, and operations specialists who collaborate across teams to lead the development and implementation of HHSA strategies • tracks outcomes and supports Agency executives in making data-informed decisions

MAA Revenue for the County of San Diego

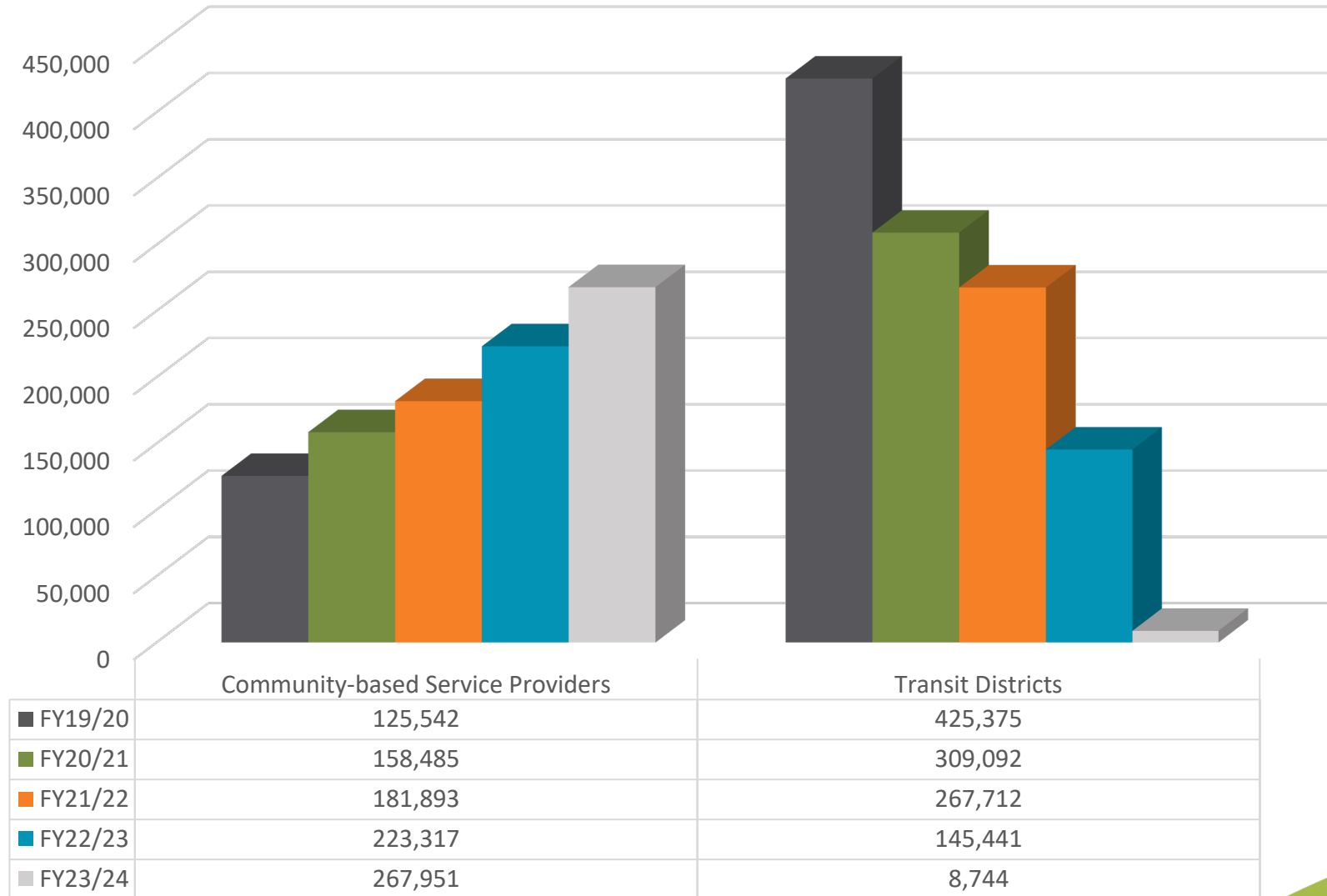


MAA CBOs in the County of San Diego



Community-Based Organizations	Scope
American Academy of Pediatrics	<ul style="list-style-type: none"> • coordinates countywide initiatives to improve health, developmental, and behavioral outcomes for children through programs funded by the County of San Diego and the First 5 Commission • strengthens Medi-Cal service systems, expands access and provider capacity, and promotes quality, culturally responsive care through policy coordination, early intervention, and program evaluation
Home Start	<ul style="list-style-type: none"> • child safety and family well-being through programs offering housing, in-home support, and parent education for low-income, homeless, and at-risk populations in San Diego County • conduct Medi-Cal outreach and referrals, while leadership collaborates with the County on planning and policy development to improve access to Medi-Cal services for vulnerable families
South Bay Community Services	<ul style="list-style-type: none"> • serving over 50,000 individuals annually in South San Diego County, offering services such as housing, counseling, and child and family support • promotes early childhood development by connecting at-risk families with medical, behavioral, and developmental resources to ensure children are healthy, nurtured, and school-ready
Transit Districts (San Diego Metropolitan Transit System, North County Transit District)	<ul style="list-style-type: none"> • offer non-emergency, non-medical transportation for Medi-Cal-eligible individuals to access Medi-Cal-covered services through ADA-compliant paratransit programs • services cover cities and unincorporated areas across San Diego County

MAA CBO Revenue in the County of San Diego



Building Bridges to Expand MAA



- Our Goal:
 - Expand Medi-Cal Administrative Activities (MAA) Program reach
- Our Strategy:
 - Focused engagement with key County Cal AIM stakeholders
 - Importance of branch leadership buy-in for sustained growth
 - Leverage County funds to support program planning



Justice-Involved Reentry Initiative



- Pilot for MAA expansion
- Collaborative planning across Sheriff and Probation Departments
- Tool to capture eligible federal reimbursement to cover County expenses
- Tailored outreach to key stakeholders:
 - Leadership
 - Fiscal
 - Line Staff

Lessons Learned Onboarding New Programs



- Role of leadership in championing MAA adoption
- The importance of aligning stakeholders across branches
- Importance of identifying MAA-claimable activities early
 - Translating Justice Involved Reentry Initiative tasks into MAA code definitions
- Communication and training to ensure buy-in and accuracy of claiming

Looking Ahead: Sustainability & Growth



- Use of nonfederal funds to draw down federal reimbursement
- Built-in sustainability by expanding to other eligible programs
- MAA as a flexible funding mechanism for public health priorities

Targeted Case Management (TCM)



TCM is a federal Medicaid service that **reimburses** eligible providers for a set of case management activities provided to individuals on Medi-Cal in a defined target population (including individuals with communicable disease).

Federally-Approved TCM Target Populations

Children Under the Age of 21 (SPA 14)

Medically Fragile Individuals (SPA 15)

Individuals at Risk of Institutionalization (SPA 16)

Individuals in Jeopardy of Negative Health or Psycho-Social Outcomes (SPA 17)

Individuals with a Communicable Disease (SPA 18)

TCM Participants



County of San Diego

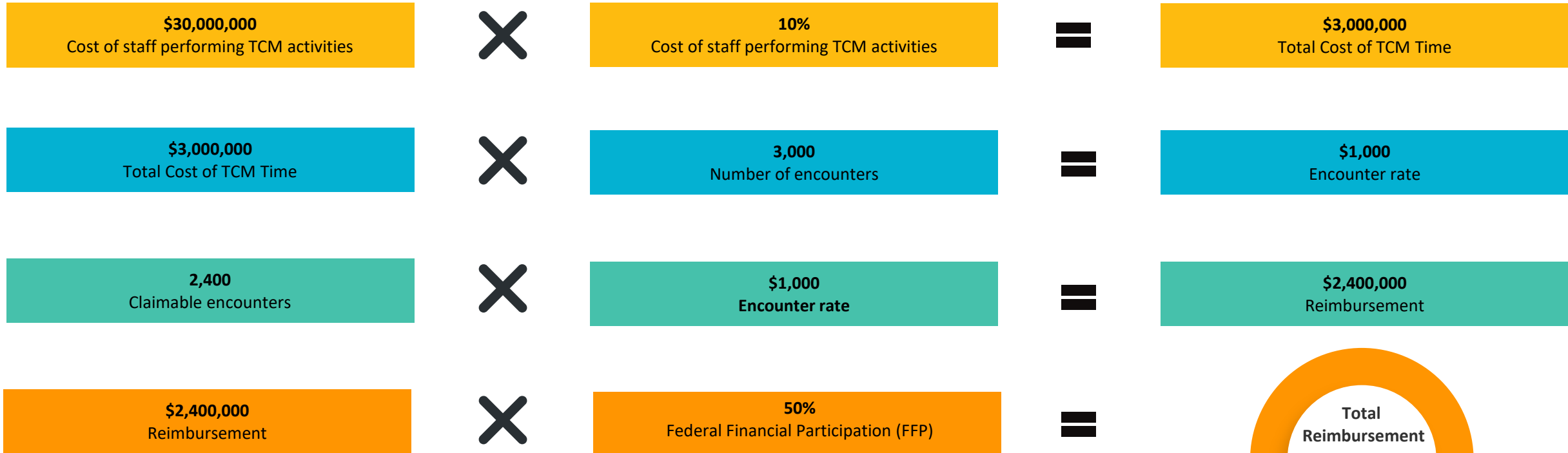
- Medical Care Services: Home Visiting Program
- Public Health Services: Tuberculosis (TB) Program

Community Base Organizations

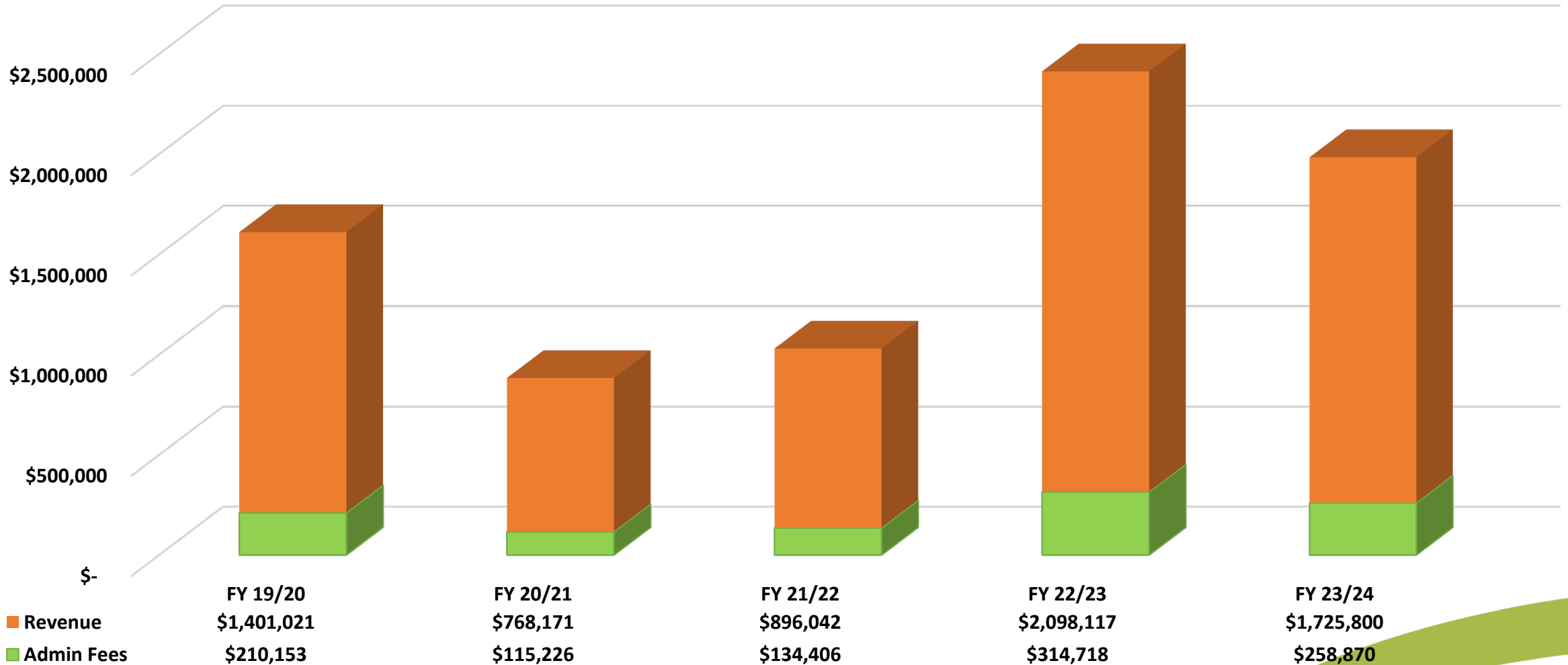
- SBCS Corporation



TCM Reimbursement Calculation



TCM Revenue for MCS Home Visiting Program



TB Program Need for TCM



- Reduction in Federal and State funding allocations
- Over-utilization of General Purpose Revenue
- Request from Agency Budget Office to identify new revenue, or come up with a strategy to reduce costs or services
- Openness of new leadership to explore new revenue opportunities

TB Program Onboarding



- Connected leadership to other TB programs participating in TCM
- Created a mock “Cost Report” to calculate estimated revenue based on Medi-Cal clients
- Identified a pilot group of case managers

TB Program: Sustainability & Growth



Keys to Success:

- Lead program person to manage the program
- Monthly meetings with program to provide support, answer questions and provide clarifications
- Ongoing quality assurance to optimize revenue and ensure program compliance

PRAISE, ENCOURAGE, ENGAGE



MAA and TCM Tools and Resources



MAA Program Overview

MAA Activities

- Outreach and Application Assistance**
Informing individuals about the Medi-Cal program, its benefits, encouraging them to apply, and assisting them to enroll.
- Linkage & Referrals**
Linking individuals to Medi-Cal services (medical, dental, mental health, substance abuse, well-childcare, etc.) through referral, coordination, and monitoring activities.
- Contract Administration**
Administering, monitoring, and oversight of contracts with CBOs or other provider agencies for the provision of Medi-Cal services and/or MAA.
- Program Planning & Policy Development**
Program planning, policy development, and interagency coordination to improve the delivery of Medi-Cal services by increasing access and removing barriers.

What is Medi-Cal Administrative Activities (MAA)?

- The State Department of Health Care Services (DHCS) partners with counties to participate in a federal Medicaid reimbursement program – Medi-Cal Administrative Activities (MAA).
- Counties draw down federal reimbursement for a defined set of Medi-Cal administrative activities that local governments and their contractors are already performing, when these activities are supported with state or local tax dollars. Federal funds are ineligible.
- No new money is required for these programs.

Documentation

- Staff must document time spent on activities. There are two options:

Perpetual Time Survey

• Staff document 100% of their MAA and non-MAA activities using a set of activity codes.

• Time is documented on a paper or electronic activity log (UKG) in 15-minute increments.

Direct Charge

• Staff document a specific MAA activity that occurs in discrete blocks of time.

• Time spent on the MAA activity is documented in 15-minute increments on an activity log.

Reimbursement

- Reimbursement is based on the actual cost of performing MAA activities, the type of MAA activities performed, the percentage of Medi-Cal clients served, and the availability of state or local funds paying for these activities.
- Invoices are submitted quarterly.
- The county charges an administrative fee for program oversight and management and for an audit reserve.
- On average, reimbursement equates to 50% of eligible total costs.

FOR ADDITIONAL INFORMATION, CONTACT:
SAN DIEGO MAA COORDINATOR - BEN.SIMSUANGCO@SDCOUNTY.CA.GOV

Targeted Case Management (TCM)

Reimbursable Activities

- The 4 TCM Service Components
 - Comprehensive assessment and periodic reassessment
 - Development and periodic revision of a specific care plan
 - Referrals and linkage based on the care plan.
 - Monitoring and follow-up activities related to identified needs.
- Other activities related to the delivery of TCM services.

Reimbursement

TCM reimbursement is cost-based. The amount of reimbursement is based on total costs, the percentage of time reported to TCM activities, and the availability of state or local general funds.

Reimbursement is generated through TCM encounters, which occur when a case manager performs one of the four TCM service components with a client via face-to-face or via telehealth.

Encounters are invoiced and paid at an interim rate determined by an annual cost report.

A final encounter rate is set during the cost report reconciliation audit, which occurs no later than 3 years after the cost report submission.

TCM is a federal Medicaid service that reimburses eligible providers for a set of case management activities provided to individuals on Medi-Cal in a defined target population (including individuals with communicable diseases). TCM assists them to access needed medical, social, educational, and other services.

Who can provide TCM?

- A registered nurse.
- An individual with a bachelor's degree from an accredited college or university, who has completed an agency-approved case management training course.
- An individual with an Associates of Arts degree from an accredited college, who has completed an agency-approved case management training course and has two years of experience performing case management duties in a health and human services field.
- An individual who has completed an agency-approved case management training course and has four years of experience performing case management duties in a health and human services field.

Documentation Requirements

- Staff document their TCM encounters (TCM service components provided face-to-face or via audio/video or audio only) to TCM-eligible clients.
- Staff document other TCM related activities, proof of eligibility, and other actions required by the State in the client's case file.
- Staff report the time they spend on allowable TCM activities in UKG using a set of activity codes established by the State.

SAN DIEGO TCM COORDINATOR: DORA.ZEEVAERT@SDCOUNTY.CA.GOV

How to Determine if a Program is Eligible



- Program Review Meeting with Staff
 - Preferred method to learn about staff's daily work and determine if there is a connection to MAA/TCM activities
- Written Activity Logs
 - Another method if time is limited

Sample Activity Log



The 'What': Please list all the activities you performed today.	The 'Why': Please provide basic background information on major activities.	MAA Alias
1 Read and reply to emails (general)	Preferred communication for most work done in the TBCRH Branch, and covers a variety of topics/activities/tasks.	Code to purpose of email
2 Attended the PHS Contracts & Fiscal Meeting	Monthly department-wide meeting that covers various contracting and fiscal topics.	MAA GEN ADM
3 Connected with staff about a vehicle with issues/needing repair	Received report of a county car in our fleet that was dropped off at the garage initially for an overheating concern. It was determined that this is an older car that will need multiple repairs and was already in the que for replacement, so a conversation about whether or not to complete the repairs should be approved or when the replacement car would be received.	TB ADMIN
4 Rescheduled contract monitoring activities for various contracts	Initial IIR for two contracts needed to be moved to different dates, as well as reviewing status of insurance certificate updates being sent in (same two contracts), and other various monitoring check ins.	MAA MC CONTR
5 Met with DPC to review and reply to comments on SSC Report	PCO let me know she received feedback from her chief and ACS Director on an SSC Report that I have been helping with as a TA. The chair was out of town, so the PCO and I met to work through the comments and update the report. We also discussed next steps and timelines.	If RFP is related to a Medi-Cal service, MAA MC CONTR. If not, TB ADMIN.
6 Updated to do list/plan for the next week	Every Friday I spend a little bit of time in the afternoon reviewing the tasks I completed and what needs to be done the next week, and update a "To Do" list I have in one note	MAA GEN ADM
7		
8		
9		
10		
11		
12		
13		
14		

Sample Program Activities Guide



TB Control - MAA Activities Guide



REMEMBER TO ASSIGN TIME BASED ON THE ACTIVITY'S PURPOSE!

UKG
ALIAS/MAA
CODE

MEETINGS

Staff, Unit, or Interagency Meetings



PRESENTATIONS

Trainings, Events, Symposiums



REPORTS

Grant Reporting, County Reports, Literature Reviews



DEVELOPMENT

Project Planning and Policy Development



MAA GEN
ADMIN
(CODE 21)

- Providing or listening to general unit updates
- Attending mandated monthly team building meetings
- Attending required ACS series trainings.

- Preparing presentation for a TB staff meeting.
- Presenting RHAP to the County Nursing Academy

- Creating and preparing financial review reports
- Preparing a health equity report requested from leadership

- Reviewing documents on the Federal Communications Commission website to update our communication policies.

MAA REFERRAL
(CODE 6)

- Prepare for and attend meetings with ISESALUD and Mexican Consulate partners to discuss infectious/chronic diseases and preventive strategies/initiatives.

- Prepare emergency preparedness presentations and engage community stakeholders during outreach events for the Partner Relay Program.
- Prepare documents for the Queso Fresco task force to educate Latinx population on the risk of consuming unpasteurized cheese.

- Reviewing FEMA guide to identify best practices of the Whole Community Approach to ensure alignment with Partner Relay policies.

- Discuss epidemiology and vector-borne disease surveillance data with partners to identify priorities and how to communicate **prevention** measures to the community.

MAA PPPD
(CODE 17)

- Attending meetings with the steering committee, sub-committee chairs, and state partners for the San Diego and Imperial Counties Border Health Collaborative where the discussion is about Medi-Cal services.

- Participate in Binational Health Week events to increase awareness of the unique health challenges Latinxs and Latinx Immigrants face.

- Meeting to discuss data and final report for the Love Your Heart Campaign.
- Preparing a Clear Impact quarterly report on cross border planning for emergency medical services.

- Planning for, attending or sharing information from the Consortium's Mental Health, HIV, Cancer, Tuberculosis, and Obesity workgroups with Binational Partners to improve access to health care.

Sample Program Activities Guide – TB Program



TCM Activities for TCM Participants TB

TCM Activity Codes

Code 24: Providing TCM Service Components UKG Alias: TCM FF Activity

(Face to Face, Audio Video, Audio Only)

- TCM Comprehensive Assessment for any client who may be eligible for TCM (telehealth or in-person)
 - Initial visit by the nurse or social worker when all screens are conducted together.
- TCM Action Plan Development (telehealth or in-person)
 - Updates to the care plan around failed screens (visual acuity, PHQ, etc.) and treatment schedule
- TCM Linkage and Referral (telehealth or in-person).
 - Referral to ophthalmologist for vision in initial assessment
 - referral to ophthalmologist for failed vision screen
 - Referral to behavioral health for failed PHQ
 - Referral to ENT
 - Referral to cardiologist for questionable EKG
 - Referral to PCP if client does not have one
- Follow up or monitoring of referrals and/or goals of the Action Plan for a TCM client (telehealth or in-person).
- Completing a 6-month periodic review (minimum) or reassessment (telehealth or in-person).

Code 26: Travel Related to Providing TCM Activities UKG Alias: TCM Travel

- Prorated travel time to and from client based on how much time was spent performing one or more of the TCM service components

Code 25: TCM Encounter-Related Activities UKG Alias: TCM NON-FF ACTIVITY

- Performing tasks that directly support TCM face-to-face or telehealth encounters for TCM clients before, during, and after the encounter, scheduling, charting, etc.
- Making an appointment for a face-to-face or telehealth (video/audio or audio only) TCM visit with a TCM client.
- Preparing for a face-to-face or telehealth TCM visit, including going to a no-show visit (video/audio or audio only).
- Entering TCM case documentation into the client case file
- Attempting a scheduled telehealth visit with a TCM client with the intent to discuss new needs, update a care/action plan, or follow up on the progress of referrals identified in the TCM action/service plan.
- Meeting with a supervisor to discuss TCM clients' needs, TCM action/care plans, or TCM-related referrals.
- Following up with TCM clients about items raised in the needs assessment, the TCM action plan, or TCM-related referrals, when the activity is not part of a TCM encounter.
- Researching potential referral sources for the specific needs of TCM clients.
- In supervision, discussing TCM-related issues.
- Participating in case conferences or consultations about the service needs of TCM clients.
- Transferring a TCM client to another TCM case manager; updating them on the assessment, action/care plan, and status of referrals; doing the warm handoff.
- New nurses (after attending MAA/TCM training) on job shadowing related to TCM service components.
- Teaching or learning how to perform the four TCM service components.
- Training specific to community referrals for TCM clients.
- Reviewing clinic visit notes for TCM clients
- Arranging transportation for patient to access their appointments

TCM Activity Codes for use by Supervisors, QA Specialists, and SSAs ONLY

Code 19: MAA/TCM Coordination and Claims Administration UKG Alias: MAA CLAIM COORD Supervisors Only)

Quality Assurance

- Participating in quality assurance activities related to the TCM program.

Code 27: Supervision of Case Manager UKG Alias: TCM CM SUPRVR

- Supervising case managers in the performance of TCM-related services.
- Reviewing TCM clients' comprehensive assessments, reassessments/periodic reviews, and action plans to ensure appropriate actions are taken to meet their goals and needs.
- In supervision, discussing referral sources for TCM clients.

Code 28: Encounter Entry into TCM On-Line System UKG Alias: TCM DATA ENTRY

- Entering encounters into the TCM online system from the case manager encounter logs.

Code 32: Program Planning/Policy Development UKG Alias: TCM PPPD

- Develop strategies to increase TCM service capacity and close gaps in resources needed by TCM clients.
- Participating in local, regional, or statewide TCM workgroups.

Code 29: TCM Data Systems and Claiming Coordination UKG Alias: TCM COORDINATION

(Cannot be performed by a case manager)

- Assisting TCM case managers and their supervisors to reconcile TCM Medi-Cal encounters identified as pending or non-claimable in the State TCM system.

Code 30: TCM Quality Assurance and Performance Monitoring UKG Alias: TCM QA

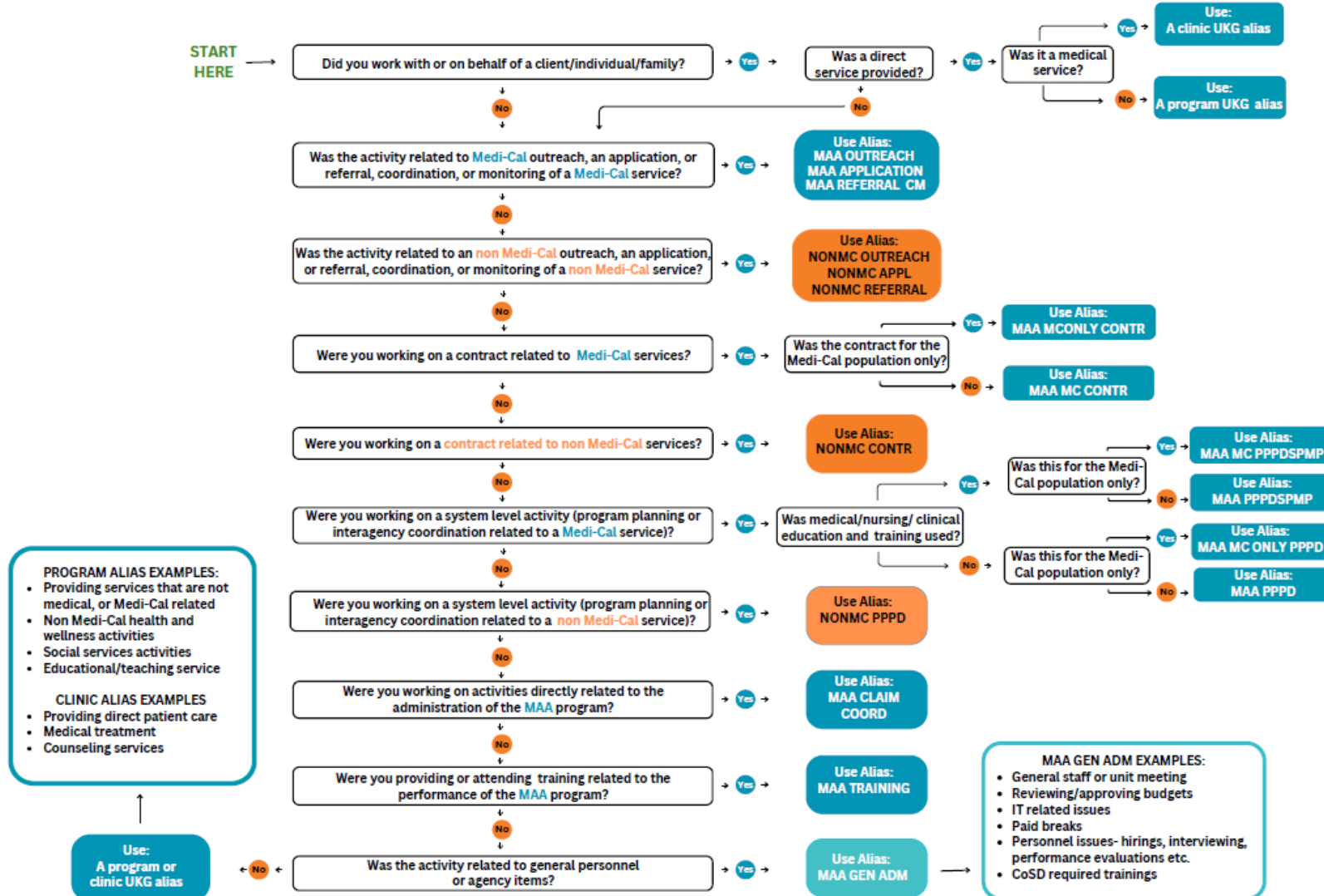
(Public Health Nurse Supervisor only)

- Developing and maintaining a TCM performance monitoring plan to prevent duplication of services and ensure coordinated case management services for the TCM client.
- Reviewing and organizing documents that may be required for DHCS TCM desk reviews or A&I reconciliation audits.
- Reviewing TCM case documentation for programmatic compliance.
- Attending TCM quality assurance meetings to review the accuracy of TCM documents.

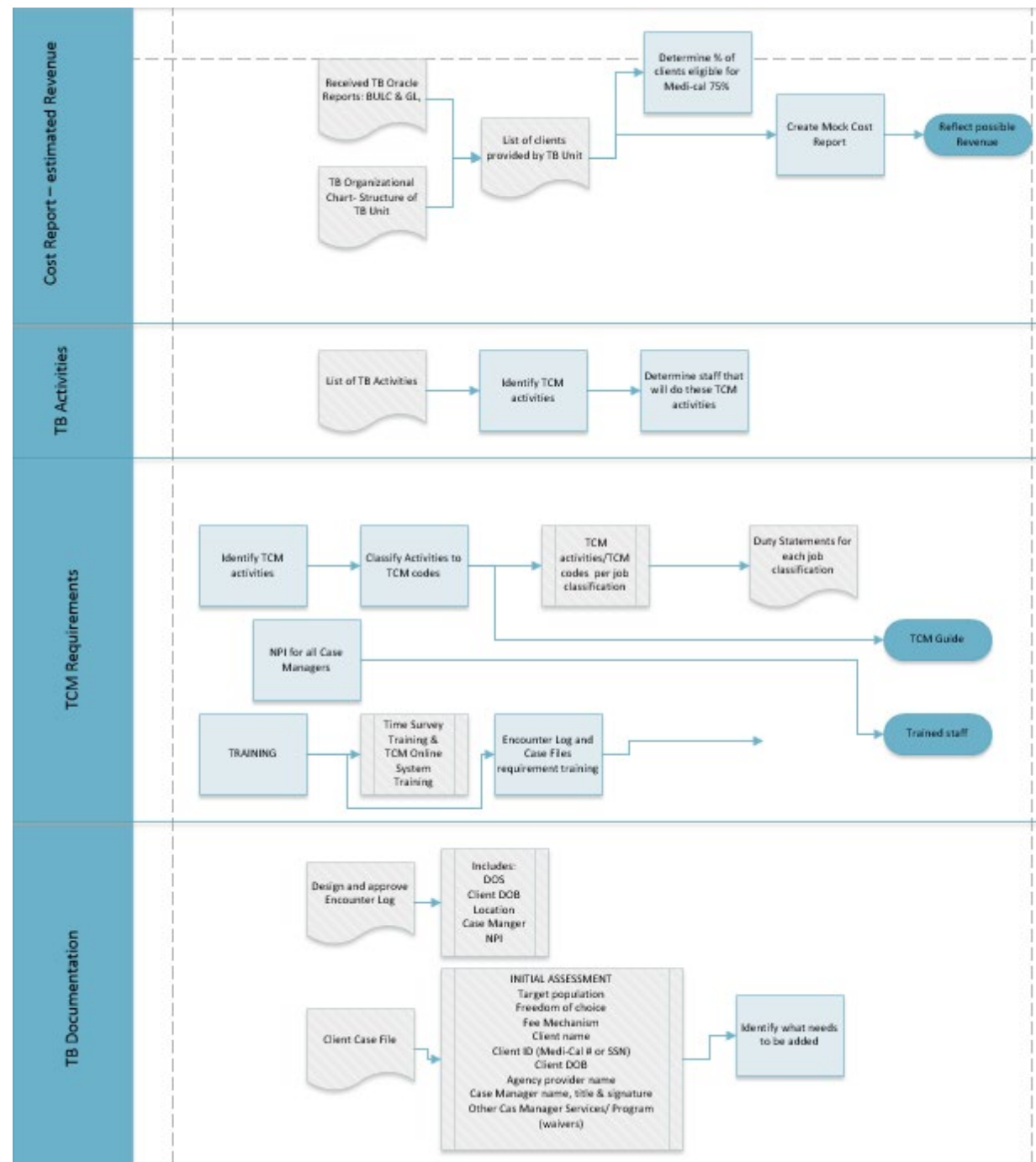
Identifying MAA-Eligible Activities



IDENTIFYING MEDI-CAL ADMINISTRATIVE ACTIVITIES (MAA)



TCM Road Map



Ongoing Monitoring and Support



- Frequent check-ins
- *“Ask us anything”* policy
- Frequent analysis of program documentation
- Specialized trainings as needed
 - Train the Trainer
- “Best Practice” sharing
- Monthly Quality Control Meetings

Questions?



Contact Us



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THANK YOU



The Public Health Services department, County of San Diego Health and Human Services Agency, has maintained national public health accreditation, since May 17, 2016, and was re-accredited by the Public Health Accreditation Board on August 21, 2023.