

**BALTIMORE COUNTY PUBLIC SCHOOLS**

**DATE:** March 28, 2006

**TO:** **BOARD OF EDUCATION**

**FROM:** Dr. Joe A. Hairston, Superintendent

**SUBJECT:** **OFFICE OF THIRD PARTY BILLING ANNUAL REPORT 2004-2005**

**ORIGINATOR:** J. Robert Haines, Deputy Superintendent, Business Services

**RESOURCE  
PERSON(S):** Barbara Burnopp, Executive Director for Fiscal Services  
Charles Tyler, Fiscal Supervisor, Third Party Billing

**INFORMATION**

The attached is an update on the Office of Third Party Billing for the 2004 –2005 school year. Information provided includes a historical overview, major accomplishments, revenues and expenses, training reports, and next steps for the Third Party Billing Program.

\* \* \* \* \*

## Third Party Billing Executive Summary

The Third Party Billing Program commenced in the spring of 1992 as a collaborative effort between Baltimore County Public Schools (BCPS) and the Baltimore County Department of Health (BCDH). The Third Party Billing Program is a systemwide effort of BCPS designed to recover health care costs from Medicaid for health care services rendered to BCPS students.

Funds recovered from the Third Party Billing Program supplement existing program budgets by funding staff positions and supplies and equipment for several programs designed to enhance special education and health related services.

The Office of Third Party Billing provides school-based training sessions to all service providers annually, offers incentive programs for schools designed to maximize the recovery of funds, conducts self-monitoring of the program to minimize audit findings, coordinates state monitoring visits conducted by the state health department and the Maryland State Department of Education (MSDE), coordinates visits by external Medicaid auditors (OIG), and works collaboratively with other LEAs and MSDE on statewide issues that impact the Third Party Billing program.

Since 2000, the Medicaid program has undergone several changes at the federal and state levels. Since fiscal year 2004, BCPS has started to see a reduction in revenue. Detailed below are some of the factors that have caused a decrease in the revenue generated by the Third Party Billing Program:

1. Autism Waiver Day Habilitation is no longer billable after September 28, 2004.
2. Changes in the transportation regulations  
In October 2004, BCPS was informed that we can no longer bill for transportation on a day that a case management service was provided.
3. Case management consent  
The Third Party Billing Registration Form was amended to include the parental consent of the case manager. Each form must be signed and completed by the parent annually before BCPS can bill for case management services.
4. Shrinking base of students  
The Office of Third Party Billing realized a loss of 199 students due to students graduating and leaving the system and fewer elementary school students becoming Medicaid eligible.

In order to address the revenue reduction, the board requested 32.6 positions, a total of \$1,883,000, in the operating budget for fiscal year 2007. The movement of these positions from the Third Party Billing budget to the operating budget will maintain the same level of services delivered to students.

# **Baltimore County Public Schools**

## **Office of Third Party Billing**

### **Annual Report**

**2004-2005 School Year**

**Report Composed by:  
Charles Tyler, Jr., Fiscal Supervisor  
Office of Third Party Billing  
December 2005**

# **BALTIMORE COUNTY PUBLIC SCHOOLS**

**Division of Business Services  
Department of Fiscal Services**

**Office of Third Party Billing  
Charles Tyler, Jr., Fiscal Supervisor**

**Suzanne Belt  
Accountant**

**Kay Crofoot  
Administrative Secretary**

**Donna Dell  
Data Clerk**

**Debra Henninger  
Autism Waiver Facilitator**

**Amanda Killian  
Data Clerk**

**Jane Mullen  
Infants & Toddlers Administrative Secretary**

**Nadine Ruocco  
Data Clerk**

**Report prepared by:  
Office of Third Party Billing  
December 2005**

# OFFICE OF THIRD PARTY BILLING 2004-2005 ANNUAL REPORT

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# Office of Third Party Billing

## Annual Report

### July 2004 – June 2005

#### **I. Historical Overview**

The Third Party Billing Program commenced in the spring of 1992 as a collaborative effort between Baltimore County Public Schools (BCPS) and the Baltimore County Department of Health (BCDH). The Third Party Billing Program is a systemwide effort of BCPS designed to recover health care costs from Medicaid for health care services rendered to BCPS students. Related services are provided and submitted for billing by speech/language pathologists, occupational therapists, physical therapists, audiologists, psychologists, nurses, and social workers. Transportation services provided to special education students were added as a billable service in 1999. As of June 1, 2005, there were 5,521 eligible special education students identified for third party billing in Baltimore County. These students constitute 39.44% of the special education population and 5.11% of the students attending BCPS.

Medicaid approved regulations for the billing of case management services in the 1993-94 school year. Case management data is submitted by special education teachers and speech/language pathologists who coordinate special education services for students. A portion of the case management funds is returned to each school participating in the program, based upon the number of case management encounter data forms submitted.

In 2002, the Maryland State Department of Education (MSDE) in conjunction with the Department of Health and Mental Hygiene (DHMH) developed and implemented the Autism Waiver program. The autism waiver program is specifically designed to assist the most severely autistic children in our society. In order for a child to qualify for the program, the parents must be willing to institutionalize their child if the program is not successful and must also declare the child as a family of one. The autism waiver had 900 slots statewide for the 2004-2005 school year; BCPS had 124 students on the autism waiver as of June 1, 2005.

Funds recovered from the Third Party Billing Program supplement existing program budgets by funding staff positions and supplies and equipment for several programs:

#### **STAFF**

- 5 speech/language pathologists
- 6 psychologists
- 53 special education teachers
- 10 school social workers
- 3 pupil personnel workers
- 21 instructional assistants
- 9 interpreters
- 23 health assistants

#### **SUPPLIES & EQUIPMENT**

- speech/language therapy
- psychology
- social work
- occupational therapy
- physical therapy
- nursing services
- school-based health centers

## **II. Major Accomplishments of the Office of Third Party Billing**

- Held 119 school-based training sessions for 863 special education teachers and administrators
- Revised and improved Third Party Billing Encounter Data Form to facilitate compliance with state and federal regulations
- Conducted 2 training sessions for 164 Individualized Education Plan (IEP) chairpersons regarding case management procedures
- Monitored all Encounter Data Forms received from schools in order to determine compliance of schools
- Worked collaboratively with Office of Internal Audit in order to perform annual monitoring of third party billing encounters
- Issued 126 Certificate of Achievement awards to schools
- Updated case management, related services, and infants and toddlers training manuals
- Provided all related services office heads with accountability reports detailing the number of forms submitted by provider
- Updated Administrator's Guide to Accessing Third Party Billing Funds

## **III. Special Education Medicaid Population**

Presently, BCPS has 5,521 Medicaid-eligible special education children for whom encounter data forms are collected and claims submitted to Medicaid. This figure constitutes 39.44% of the children currently receiving special education services. Exhibit A denotes the number of BCPS students who are eligible for the Third Party Billing program by fiscal year. The decrease from the 2003-2004 school year was 199 students. The Office of Third Party Billing has developed a plan to modify internal procedures to assist in the Medicaid determination process. On a weekly schedule, the data in the student data tracking system is matched against the data in the third party billing system. The result is a report of students who are new to special education. This list is checked using the electronic verification system in order to determine Medicaid eligibility, schools are informed of the status of the student, and Encounter Data Forms are submitted for reimbursement. Exhibit B is the third party billing registration form that is sent home to the families of all special education students annually. Exhibit C charts the process for a third party billing registration form and parental consent.

## **IV. Training Sessions**

In direct support of the *Blueprint for Progress* indicator 8.4 the Office of Third Party Billing provides an array of training sessions to BCPS employees. These sessions include related service provider training sessions, IEP chair training sessions, and school-based training sessions.

Related service provider training sessions are usually refresher meetings designed to communicate new information regarding billing procedures to continuing employees. Separate training sessions are held for related service providers who are new to BCPS. These training sessions are more intensive and are designed for employees who have a

varied knowledge of billing requirements and procedures. Each attendee receives a *Related Service Training Manual*, which is revised annually in order to ensure accurate information for school-based staff. Exhibit D is a chart of the percentage of Related Service Encounter Data Forms received by discipline. Exhibit E details the average amount of reimbursement by discipline, based upon the percentage of Encounter Data Forms submitted.

Training for all IEP chairs is completed annually in conjunction with the Office of Special Education. The sessions are designed to provide an overarching approach to the Third Party Billing Program. In addition, the sessions show the IEP chairs how to ensure accountability in the submission of Case Management Encounter Data Forms.

The Office of Third Party Billing also provides school-based training sessions, which allow the special education teachers and other service providers the opportunity to ask detailed questions in a small group setting. All meeting attendees receive a *Case Management Training Manual*, which is revised on an annual basis. Exhibit F delineates the training sessions provided during the 2004-2005 school year. Exhibit G details the percentage of case management services provided to students by type.

For the 2004-2005 school year, the Office of Third Party Billing provided its annual survey to all school-based training session participants. The results of the survey are attached as Exhibit H.

Based upon the various comments made by the participants in the training sessions, the Office of Third Party Billing implemented some changes including providing the survey to training participants no later than two weeks after the session and developing a list of common mistakes for those who are new to completing third party billing forms.

## **V. Third Party Billing Revenue**

A graph of third party billing revenues is attached as Exhibit I. For fiscal year 2005, the Office of Third Party Billing generated a total of \$7,592,403 in revenue. This figure is a substantial reduction from previous years. The reasons for the decrease in revenue are discussed in Section XIII, New Barriers to Increasing Medicaid Revenue.

## **VI. Incentive Programs**

The Office of Third Party Billing has a strong incentive program in place in order to increase the potential reimbursement for services and to hold schools and offices accountable for the documentation of services.

One of the largest components of the incentive program is the return of a portion of the case management funds to each school. The principal, IEP chair, and case managers are given the opportunity to determine how the returned funds can be utilized to support, expand, and enhance special education and health-related services in schools. In order to ensure accountability with the memorandum of understanding between the MSDE and BCPS, all requests for funds through the incentive program must be approved by the principal, the Office of Third Party Billing, and the area assistant superintendents. A copy



of the Third Party Billing Action Plan, a form designed to capture all information and detail the approval process, is attached as Exhibit J. Third party billing funds are allocated based upon the percentage of the case management encounter data submitted. This process ensures equity in the distribution of funds based upon the number of special education Medicaid-eligible students at each school. Individual schools have received from \$25 to \$25,000 annually for their special education programs through this initiative.

The Certificate of Achievement is an additional incentive for schools. Commenced in 1996, the Office of Third Party Billing produces a Certificate of Achievement for each school that submits 95% or more of its potential case management encounter data. The awards are presented to principals, and many of these awards can be seen displayed in school lobbies and showcases. A chart delineating the number of schools that have received this award in the past eight years is attached as Exhibit K. To offset a decrease in the number of certificates awarded to schools, third party billing will be providing more reports to principals stressing the rewards of the program.

## **VII. Accountability**

A major reason for the success of the Third Party Billing Program is accountability. To assist schools and related service office heads who are accountable for the submission of Encounter Data Forms, the Office of Third Party Billing sends accountability reports on a bimonthly basis. This report shows each case management Encounter Data Form submitted, the procedure code, date of service, and provider name. The school-based staff can use this report as a receipt to ensure that all data were received and to determine what data have not been submitted. Typically, the dissemination of this information leads to a large increase in the encounter data submitted to the Office of Third Party Billing.

The Office of Third Party Billing also produces reports on Encounter Data Forms for all related services office heads. This report allows the office head to monitor the staff at each school. In many instances, the submission of Encounter Data Forms can be linked directly to the caseloads of providers. The use of real-time data as a monitoring tool is an important factor in holding staff accountable for documenting services rendered to special education Medicaid-eligible students.

## **IX. Interagency Medicaid Monitoring Team**

The Interagency Medicaid Monitoring Team (IMMT) was created by the MSDE and the DHMH as a result of the report issued by the Office of the Inspector General (OIG) of the United States on the State of Maryland. One of the major findings in the report stated that the MSDE and DHMH lacked proper oversight of the Medicaid program in the schools. The mission of the team is to review records annually of each school system to ensure compliance with the Federal and State regulations. The IMMT has reviewed BCPS records twice. The Office of Third Party Billing has worked collaboratively with several offices to make changes to enhance the Third Party Billing Program and to ensure compliance.

For fiscal year 2006, the following changes have been instituted for the Third Party Billing Program and school-based providers:

1. The Case Management Activity Detail Log has been revised for school-based providers to include their credentials. By detailing their credentials, providers who do not meet the minimum requirements to bill Medicaid should be eliminated from the process. A sample of the Case Management Activity Detail Log is attached as Exhibit L.
2. The Case Management Activity Detail Log has been placed on the third party billing website so that school-based staff can download the form and maintain the data electronically.
3. Logs used by speech language pathologists, occupational therapists, and physical therapists will be edited to include the signature of the provider on each page of the log.

The office heads of health, counseling, social work, and psychology will be developing a standardized form to be used by providers of their respective disciplines. The form will serve the purpose of a log to document that a service was provided to the student. The document will be required to meet the minimum billing standards as set forth by Medicaid.

## **X. Self-Monitoring of Processes**

The Office of Third Party Billing has a very rigorous process for monitoring all encounter data that is received in the office. For example, all encounter data forms are reviewed for errors, and the erroneous forms are returned to providers for corrections. In addition, the computer database verifies the accuracy of the date of the service and verifies that the services are actually included in the IEP of the student.

Based upon the OIG audit, the MSDE has mandated that each local education agency set up a self-monitoring process and have it approved by the MSDE. The Office of Third Party Billing has worked collaboratively with the BCPS Office of Internal Audit and MSDE to develop a more comprehensive self-monitoring process.

The Office of Third Party Billing self-monitoring component is a collaborative effort with the Office of Internal Audit. Each year, the Office of Internal Audit determines the claims and students to be reviewed based upon findings in the IMMT report as well as the previous self-monitoring report. By using this methodology, it is easy to see if process improvements are being made.

In the 2004-2005 school year, the IMMT visited BCPS on April 13, 2005. The BCPS team that participated in the review consisted of members from the Department of Federal and State Programs, the Department of Fiscal Services, the Department of Human Resources, the Department of Planning and Support Operations, the Department of Student Support Services, and the Office of Internal Audit. The IMMT reviewed records for twenty (20) students that equated to 128 billable services. Most of the findings in the report were minor, and will be addressed by the Office of Third Party Billing through training efforts in the upcoming school year.

## **XI. School-Based Health Center Billing**

The school-based health centers are designed to be used to keep students who may have some health related issues in school and functioning at a high level. The centers are typically used by students who may not receive health care due to a multitude of barriers, including the lack of health care coverage, parents without adequate transportation, as well as parents who may have to lose time from work in order to take the student to the doctor.

BCPS has been providing and billing for school-based health center services since 1995. BCPS bills private insurance companies and Medicaid annually for school-based health center services provided in the fourteen (14) sites. Exhibit M delineates the number of school-based health center visits by center during the 2004-2005 school year. Exhibit N details the funds generated by school-based health centers based upon the number of services provided to students. Since the billing process has been centralized, the revenue from the program has increased steadily with the exception of the 2004-2005 school year. The Office of Third Party Billing has determined that the decrease in reimbursement in that year can be attributed to insurance companies paying their bills after the close of the BCPS fiscal year.

## **XII. Medicaid Home and Community-Based Autism Waiver Program**

The Medicaid Home and Community-based Autism Waiver Program is a medical assistance program that was developed as a joint effort between MSDE and DHMH in order to offer support at home and in the community to this extremely challenging population. Initially, this program offered services including day habilitation, intensive individual support services, respite care, environmental accessibility adaptations, family training, and residential habilitation. Eligibility for waiver services is determined by technical, financial, and medical criteria, and slots have been filled on a “first come, first served” basis. Originally begun with only 150 slots, the waiver program currently has over 900 participants statewide and there are no plans at this time for new slots to be added to the state cap. The slots only become available when a child reaches the age of 21, moves out of the state, or no longer meets eligibility requirements.

In BCPS, there were 124 students participating in the waiver program as of June 2005. Many of the families of these students were able to receive services that were unavailable to them by any other means, and improved their quality of life significantly. In other cases, parents were able to spend time doing homework with their non-disabled children while the student with autism worked with a technician at home at the same time on life skills. Many families have benefited from the behavioral support and family training that has been provided through the autism waiver. The children on the waiver have also experienced, in many cases, improved behavior and support with IEP goals because the home programs are working in tandem with school programs for the overall developmental improvement of these children. Exhibit O details the autism waiver services provided by type during the 2004-2005 school year.

In March 2005, DHMH conducted an on-site review of the Medicaid Home and Community-Based Autism Waiver program and representatives from the Inspection of Care (IOC) team selected 7 BCPS students as part of the statewide review. The IOC team

reviewed folders, interviewed parents, and visited students in their homes, and residential and school programs. The exit interview and subsequent information revealed that BCPS is doing “an excellent job with large participant load,” that all records were “present, in good order, well purged, with all essentials present,” and that questionable issues are primarily not at the local level, but are being addressed by MSDE. Overall, the IOC team had praise for BCPS’ program, and suggestions made have begun to be implemented gradually.

The Office of Third Party Billing has been able to demonstrate that revenue can be generated through the autism waiver due to the manner in which it has been managed. In September 2004 BCPS was informed of a decision by MSDE to not allow billing for day habilitation. This decision has decreased revenues. It was determined that billing for this service was in direct violation of IDEA regulations, and the billing was discontinued. BCPS has approximately 20% of the 1,200 names on the autism waiver registry waiting list. Approximately 25 additional BCPS students will be added to the autism waiver beginning in July, 2006.

### **XIII. New Barriers to Increasing Medicaid Revenue**

Since 2000, the Medicaid program has undergone a plethora of changes at the federal and state level. Specifically, there has been a concerted effort to decrease the amount of reimbursement paid to schools for services rendered to special needs students. Detailed below are some of the barriers to billing that have caused a significant decrease in the revenue generated by the Third Party Billing Program:

- Autism Waiver Day Habilitation no longer billable after September 28, 2004
  - When MSDE and DHMH worked to get the Autism Waiver Medicaid Home and Community Based Program reauthorized for five years, they did not include day habilitation as a service since it was questioned at the federal level at an estimated one million dollars annually.
- Changes in the transportation regulations
  - MSDE informed LEAs in October 2004 at the medicaid coordinator annual meeting that we can no longer bill for transportation on a day that case management was provided, at an estimated net loss to BCPS of \$500,000 annually.
- Case management consent
  - In April 2004, the IMMT review showed that the case management billing consent form that was in use by BCPS was faulty. Specifically, the name of the case manager was not recorded on the same page as the parent signature approving the case manager. As a direct result, the Office of Third Party Billing met with the Offices of Special Education and Legal Counsel in order to determine the appropriate change. For the 2004-2005 school year, the Third Party Billing Registration Form was amended to include the parental consent of the case manager. 83.12 % of the registration forms were returned during the 2004-2005 school year, thus resulting in a decrease in reimbursement to BCPS of approximately \$800,000.

The action plan for the Office of Third Party Billing is to work with principals, IEP chairs, pupil personnel workers, and social workers to get the forms returned from families in a timely fashion in order to increase reimbursement.

- Transportation logs
  - BCPS does not currently maintain rider logs for special education students in regular schools. The rider log is a requirement in order to bill Medicaid. The intent of the log is to show that the student got on and off of the bus on the day that the student also received a related service at an estimate net loss to BCPS of \$300,000 dollars annually.

The Office of Third Party Billing is working with the Office of Transportation to get a new Global Positioning System running on all special buses. This system will electronically log when the student gets on and off of the bus and will satisfy the requirement for maintaining logs.

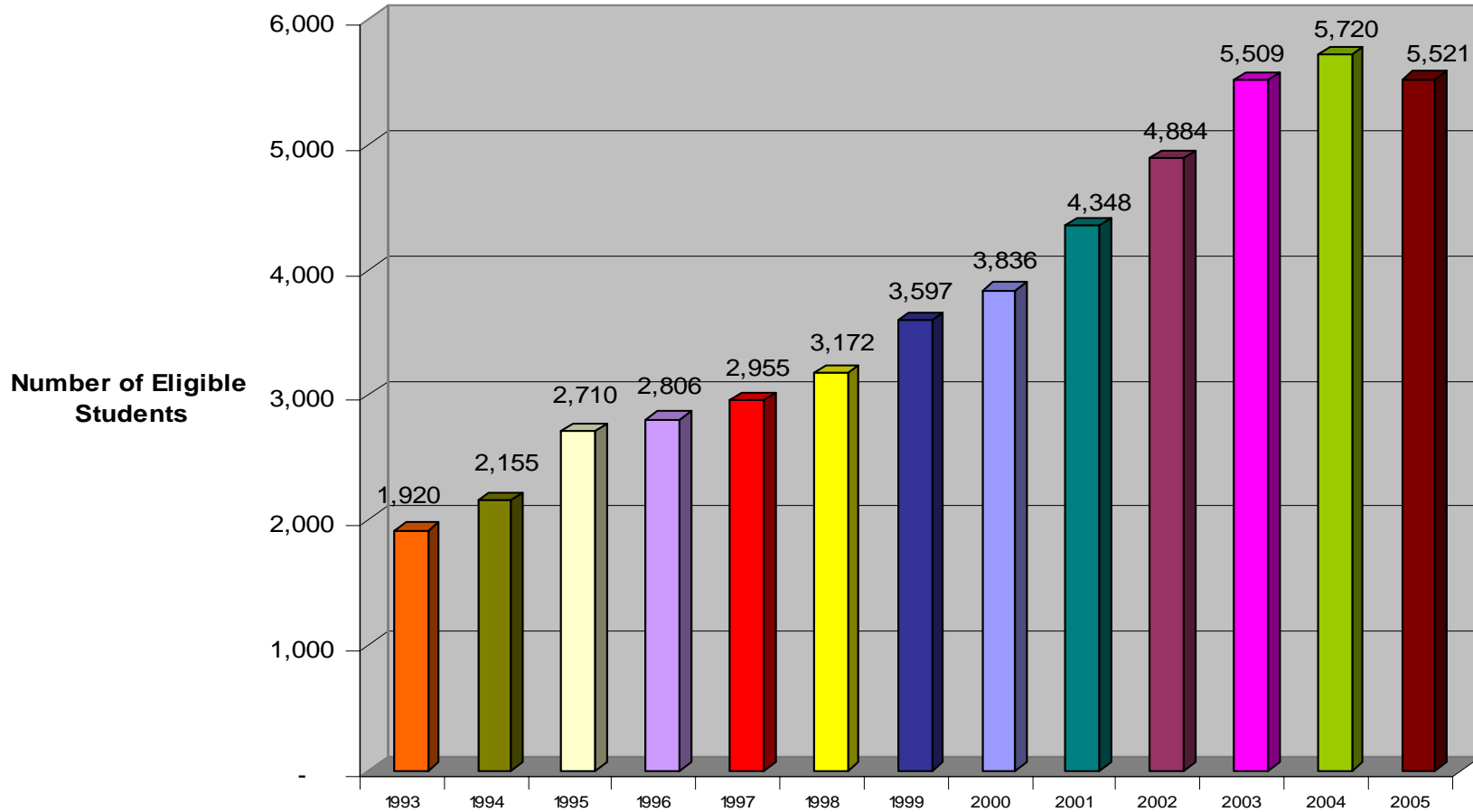
- Shrinking base of students
  - The Office of Third Party Billing saw a loss of 199 students identified as being eligible for the program from the 2003-2004 school year to the 2004-2005 school year (see Exhibit A). This loss is attributed to children graduating and leaving the system and fewer elementary school students becoming Medicaid eligible at an estimated net loss to BCPS of \$700,000 dollars annually.

The Office of Third Party Billing plans to work with the Offices of Student Support Services, Special Education, Area Assistant Superintendents, and the Baltimore County Department of Health in order to have a new Medical Assistance awareness program for parents. This should increase the number of eligible students.

# EXHIBITS

Kay New/04-05/Annual/Overview

## Students Eligible for the Third Party Billing Program by School Year



# BALTIMORE COUNTY PUBLIC SCHOOLS

Joe A. Hairston, Superintendent

6901 Charles Street

Towson, Maryland 21204-3711

Dear Parent/Guardian:

The Baltimore County Public Schools are pleased to provide special education services to your child. In order to maintain the highest quality of special education services, we are requesting your assistance. The Baltimore County Public Schools are able to bill Medical Assistance for some services that may be provided to your child. There is no cost to your family. This will not affect or change your Medical Assistance benefits, and will help the Baltimore County Public Schools to obtain funds for children with special needs.

**PLEASE COMPLETE AND RETURN THIS FORM TO YOUR CHILD'S SCHOOL. THIS INFORMATION WILL REMAIN CONFIDENTIAL AND ONLY BE USED TO BILL MEDICAL ASSISTANCE FOR SERVICES PROVIDED TO YOUR CHILD.**

We appreciate your cooperation. If you have any questions, please feel free to contact **The Office of Third Party Billing at 410-887-4130** or your child's school.

Sincerely,

Principal

-----  
**Student Name:** \_\_\_\_\_

**Student Identification Number or Social Security:** \_\_\_\_\_

**Student Date of Birth:** \_\_\_\_\_

**School:** \_\_\_\_\_

**STUDENT MEDICAL ASSISTANCE NUMBER (MA#)**

\_\_\_\_ - \_\_\_\_ - \_\_\_\_ - \_\_\_\_ - \_\_\_\_ - \_\_\_\_ - \_\_\_\_ - \_\_\_\_

**I give permission for my child to receive Case Management services and I approve of the Case Manager for my child.**

\_\_\_\_\_ Case Manager

\_\_\_\_\_ Alternate Case Manager

\_\_\_\_\_ 2<sup>nd</sup> Alternate Case Manager

\_\_\_\_\_  
**Signature of Parent/Guardian**

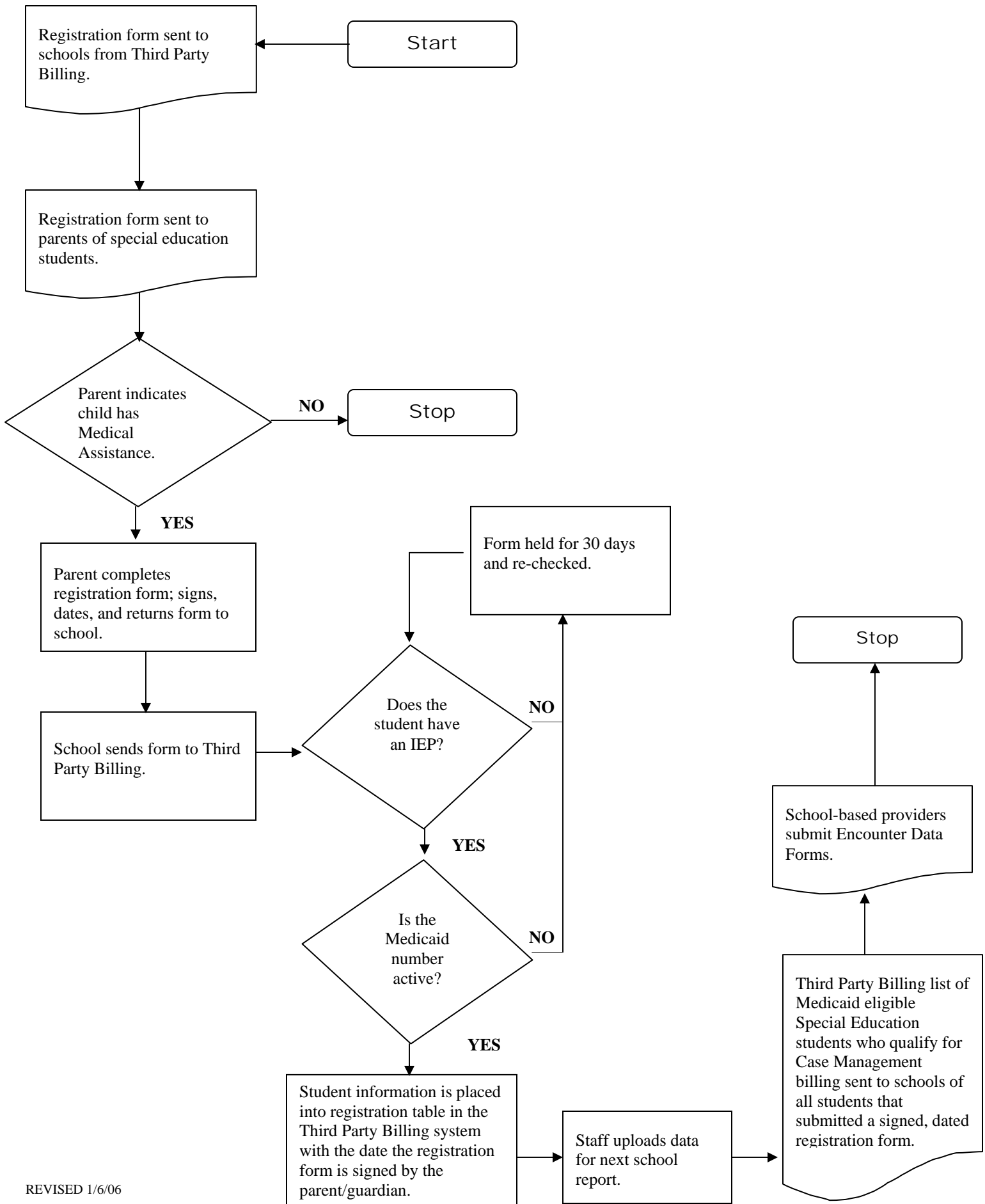
\_\_\_\_\_  
**Date**

⇒ Please return this form to your child's school.

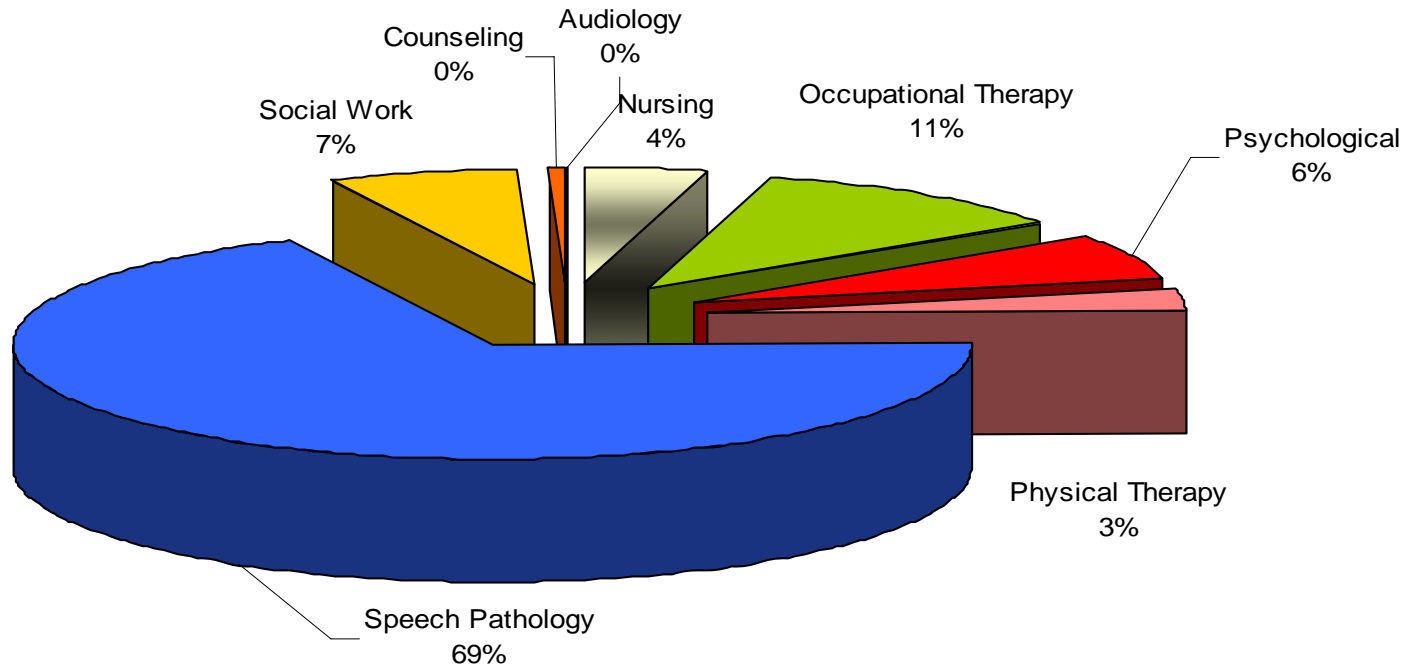
\*School Staff: Please forward all completed forms to the *Office of Third Party Billing* in Timonium.



**Process For A Baltimore County Public Schools  
Third Party Billing Registration Form and Parental Consent  
For Case Management Billing**



**Baltimore County Public Schools  
Percentage of Related Service Encounter Data Forms Received by Discipline  
2004-2005 School Year**



**Estimated Third Party Billing Reimbursement by Discipline  
2004-2005 School Year, Based Upon the Percentage of Encounter Data Forms Submitted**

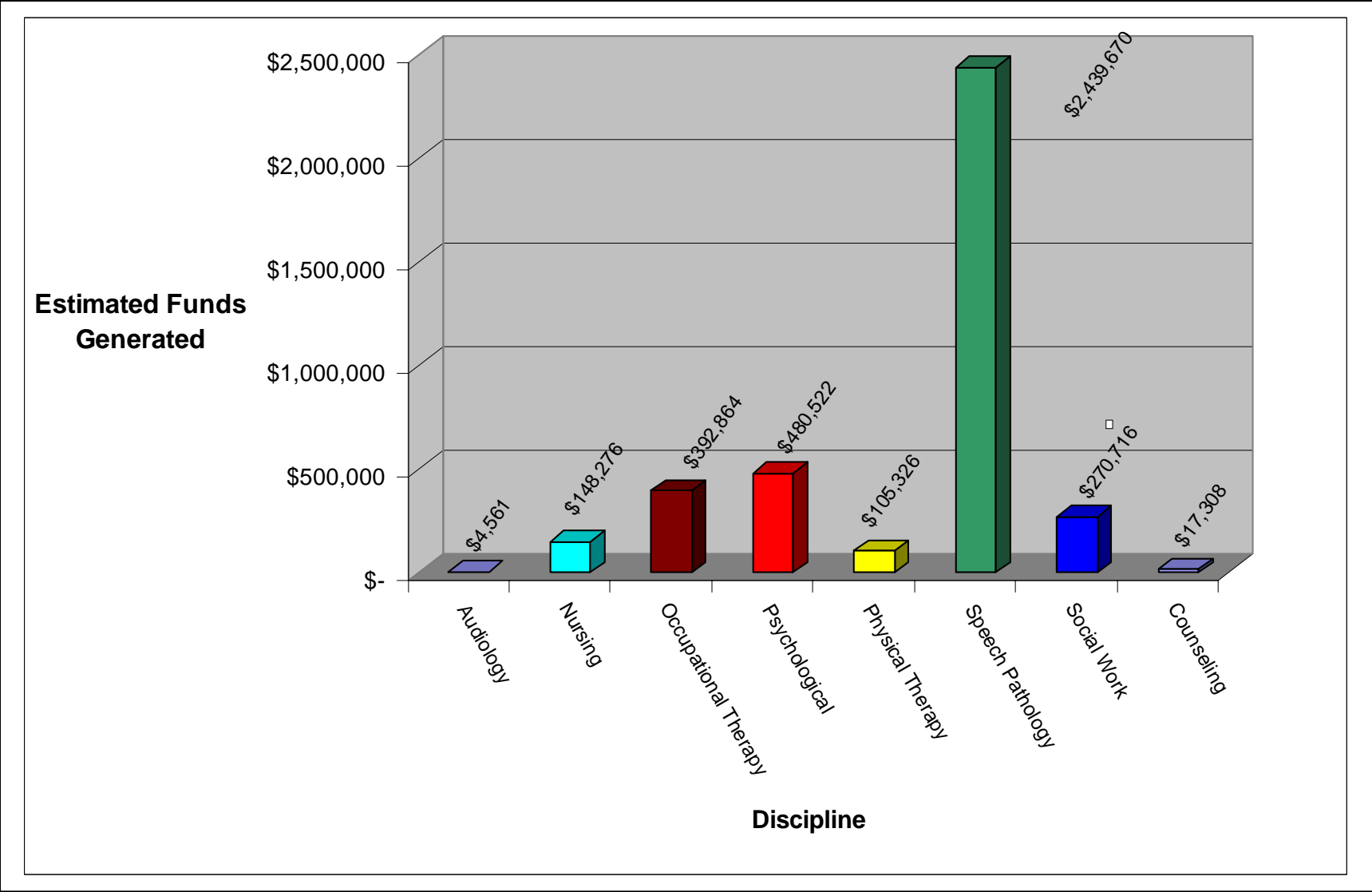


Exhibit E

**BALTIMORE COUNTY PUBLIC SCHOOLS**  
**THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS**  
**2004-2005 School Year**

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Arbutus Middle	Thea Golub	Special Education Department Chairperson	8	October 18, 2004
Baltimore Highlands Elementary	Barbara Shields	Assistant Principal	7	October 8, 2004
Battle Grove Elementary	Sabina Offley	Assistant Principal	6	October 21, 2004
Battle Monument School	Rosie Daddura	Principal	13	October 25, 2004
Bedford Elementary	Tracy Faddis-Robinson	Assistant Principal	4	September 29, 2004
Berkshire Elementary	Sharon Marquette	Assistant Principal	5	September 8, 2004
Campfield Early Childhood Learning	Lydia Blake	Assistant Principal	13	August 24, 2004
Carney Elementary	Mary Kriebel	Assistant Principal	7	October 8, 2004
Carver Center for the Arts	Allyson Haley	Special Education Department Chairperson	5	August 24, 2004
Catonsville Middle	Nicole Norris	Assistant Principal	7	December 13, 2004
CCBC	Monica Simonsen	Teacher	2	September 27, 2004
Cedarmere Elementary	Holly Shorr	Special Educator	5	October 26, 2004
Chadwick Elementary	Edna Dunn-Rogers	Assistant Principal	3	September 3, 2004
Charlesmont Elementary	Diane Shupe	Assistant Principal	8	November 11, 2004
Chase Elementary	Patricia Blair	Assistant Principal	5	September 24, 2004
Church Lane Elementary	Beth Abraham	Assistant Principal	5	October 29, 2004
Cockeysville Middle	Katie Schmitt	IEP Chairperson	7	November 8, 2004
Colgate Elementary	Joyce Cummings	Assistant Principal	3	October 8, 2004

**BALTIMORE COUNTY PUBLIC SCHOOLS**  
**THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS**  
**2004-2005 School Year**

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Cromwell Valley Elementary	Darlene Morrison	Assistant Principal	3	October 27, 2004
Deep Creek Elementary	Sharon Mason	Assistant Principal	4	August 31, 2004
Deep Creek Middle	Carisa Bowman	Special Education Department Chairperson	10	September 3, 2004
Deer Park Elementary	Theresia Lafferman	Assistant Principal	8	August 25, 2004
Deer Park Middle Magnet	Kalisha Miller	Special Education Department Chairperson	6	September 27, 2004
Dogwood Elementary	Kimberly Mitchell	Assistant Principal	4	December 7, 2005
Dundalk Elementary	Meghan Nelson-Tracey	Assistant Principal	8	August 31, 2004
Dundalk Middle	Eric Depkin	Special Education Department Chairperson	5	October 10, 2004
Eastern Technical High	Diane Young	Assistant Principal	3	October 25, 2004
Eastwood Center	Marge Roberts	IEP Chairperson	5	September 20, 2004
Edgemere Elementary	Kim O'Connor	Assistant Principal	5	September 20, 2004
Edmondson Heights Elementary	Barbara Davis	Assistant Principal	8	October 12, 2004
Elmwood Elementary	Donna Bergin	Assistant Principal	10	October 13, 2004
Fifth District Elementary	Carol Quental	Principal	2	September 7, 2004
Fort Garrison Elementary	Arlene Bekman	Assistant Principal	10	August 23, 2004
Fullerton Elementary	Lynn Lavery	Assistant Principal	3	October 6, 2004
General John Stricker Middle	Barbara Victor	Special Education Department Chairperson	13	October 19, 2004
Glenmar Elementary	Kathleen Warren	Assistant Principal	7	September 8, 2004

**BALTIMORE COUNTY PUBLIC SCHOOLS**  
**THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS**  
**2004-2005 School Year**

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Glyndon Elementary	Barbara Johnson	Assistant Principal	4	November 8, 2004
Golden Ring Middle	Ali Mahon	IEP Chairperson	12	October 26, 2004
Grange Elementary	April Seifert	Assistant Principal	5	September 15, 2004
Gunpowder Elementary	Christine Smith	Principal	6	August 26, 2004
Halethorpe Elementary	Gerry DePetris	Assistant Principal	15	October 27, 2004
Halstead Academy	Pamela Peters	Assistant Principal	3	October 29, 2004
Hampton Elementary	Sylvia Lemons	Assistant Principal	3	October 19, 2004
Hawthorne Elementary	Jacob Little	Assistant Principal	9	November 16, 2004
Hebbville Elementary	Dawn Marschall	Assistant Principal	11	September 9, 2004
Hernwood Elementary	Stephen Coco	Assistant Principal	7	September 21, 2004
Home and Hospital	Vicky Ciulla	Principal	10	October 26, 2004
Holabird Middle	Paul Satterfield	IEP Chairperson	8	November 15, 2004
Jacksonville Elementary	Nancy Aumiller	Assistant Principal	10	October 27, 2004
Johnnycake Elementary	Tiffany Livingstone	Assistant Principal	4	September 15, 2004
Joppa View Elementary	Michael Parker	Assistant Principal	6	September 1, 2004
Kenwood High	Karen Huggins	Special Education Department Chairperson	16	November 9, 2004
Kingsville Elementary	Susan Peterson	Assistant Principal	5	August 31, 2004
Lansdowne Elementary	Kim Shaw	Special Education Department Chairperson	3	November 11, 2004

**BALTIMORE COUNTY PUBLIC SCHOOLS**  
**THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS**  
**2004-2005 School Year**

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Lansdowne High	David Stovenour	IEP Chairperson	8	September 21, 2004
Lansdowne Middle	Kara Boehl	Special Education Department Chairperson	6	November 12, 2004
Loch Raven Academy	Sally Bowers	IEP Chairperson	9	September 13, 2004
Loch Raven High	Patricia Dwyer	Special Education Department Chairperson	6	November 16, 2004
Logan Elementary	Sally Barbieri	Assistant Principal	7	August 23, 2004
Lutherville Laboratory Elementary	Kathleen Poff	Principal	6	November 5, 2004
Mars Estates Elementary	Harry Belsinger	IEP Facilitator	8	August 27, 2004
Martin Blvd. Elementary	Jill Bender	Principal	7	November 23, 2004
McCormick Elementary	Nellie Slater	Assistant Principal	6	September 8, 2004
Middlesex Elementary	Jeanne McGuire	Assistant Principal	10	September 22, 2004
Middleborough Elementary	Douglas Elmendorf	Assistant Principal	7	November 4, 2004
Middle River Middle	Mary Ann Knapp	Special Education Department Chairperson	10	August 27, 2004
Milbrook Elementary	Brian Cooper	Assistant Principal	4	September 1, 2004
Milford Mill Academy	Venice Williams	IEP Chairperson	9	November 10, 2004
New Town Elementary	Nashae Bennett	Assistant Principal	6	August 25, 2004
New Town High	Michellaine Fields	Special Education Department Chairperson	3	September 17, 2004
Norwood Elementary	Nancy Fox	Assistant Principal	4	September 9, 2004
Old Court Middle	Sandra DeMar	Special Education Department Chairperson	10	October 20, 2004

**BALTIMORE COUNTY PUBLIC SCHOOLS**  
**THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS**  
**2004-2005 School Year**

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Oliver Beach Elementary	Charlene Behnke	Assistant Principal	4	October 15, 2004
Orems Elementary	Julia Olmedo	Assistant Principal	6	August 30, 2004
Owings Mills Elementary	Jennifer Bischer	Assistant Principal	4	September 8, 2004
Owings Mills High	Sharon Baylin	Special Education Department Chairperson	8	September 13, 2004
Parkville High	Allison Jefferson	IEP Chairperson	15	September 22, 2004
Patapsco High	Mary E. Harbach	Special Education Department Chairperson	11	October 28, 2004
Perry Hall High	Michael Bacon	IEP Chairperson	9	November 3, 2004
Perry Hall Middle	Robin Cooney	IEP Chairperson	13	November 4, 2004
Pikesville Middle	Kathleen Pelletier	Special Education Department Chairperson	11	November 1, 2004
Pine Grove Elementary	Jennifer Severson	Assistant Principal	3	September 13, 2004
Pinewood Elementary	Cheryl Jones	Assistant Principal	6	September 27, 2004
Pleasant Plains Elementary	John Lanahan	Assistant Principal	6	September 3, 2004
Pot Spring Elementary	Jane Martin	Assistant Principal	5	September 17, 2004
Randallstown Elementary	Benjamin Mertes	Assistant Principal	5	September 13, 2004
Randallstown High	Vickie Watts	Special Education Department Chairperson	7	October 1, 2004
Red House Run Elementary	Drue Whitney	Assistant Principal	7	October 27, 2004
Riderwood Elementary	Patricia Murphy	Assistant Principal	6	September 1, 2004
Ridge Ruxton School	Edmund Bennett	Principal	27	September 7, 2004



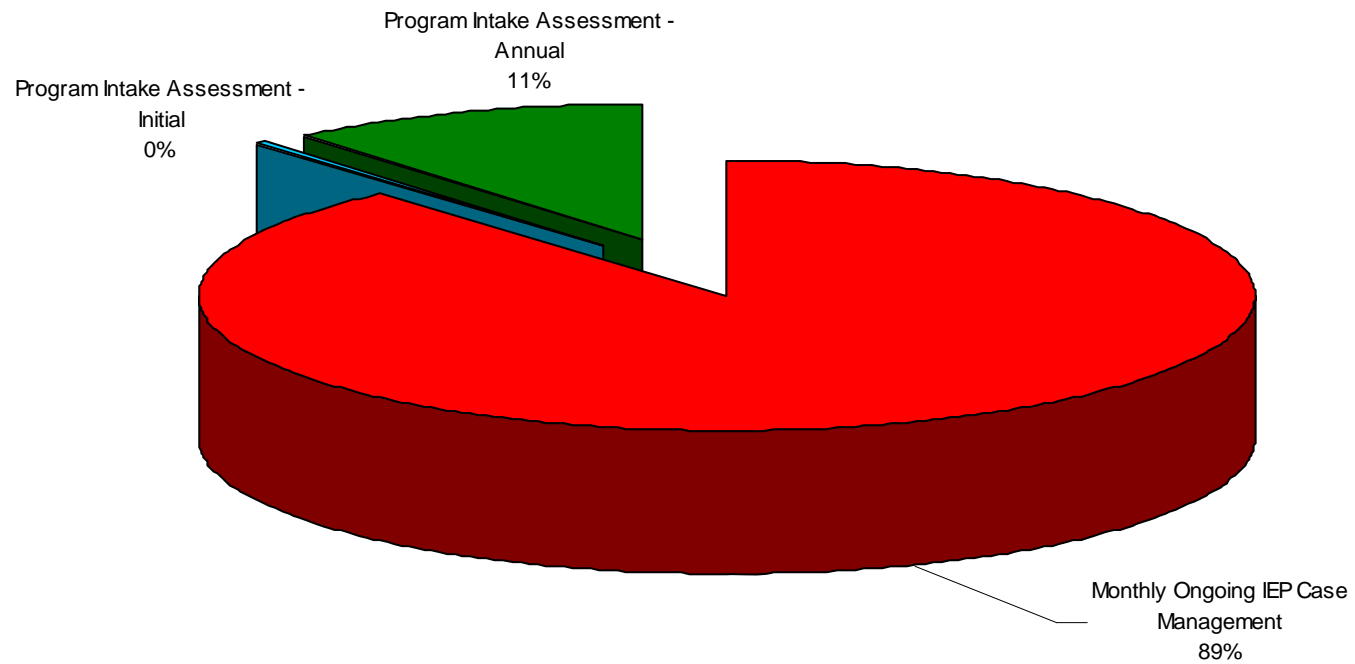
**BALTIMORE COUNTY PUBLIC SCHOOLS**  
**THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS**  
**2004-2005 School Year**

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Ridgely Middle	Barbara Lopez	IEP Chairperson	9	October 7, 2004
Rosedale Center School	Linda MacLeod	Special Education Department Chairperson	6	October 21, 2004
Sandalwood Elementary	Barbara Lewis	IEP Chairperson	6	September 7, 2004
Sandy Plains Elementary	Wendy Cloughen	Assistant Principal	9	September 10, 2004
Scotts Branch Elementary	Wanda Shelton	Assistant Principal	6	August 26, 2004
Seneca Elementary	Brad Palmer	Assistant Principal	4	September 20, 2004
Seventh District Elementary	Hope Baier	Assistant Principal	6	August 26, 2004
Shady Spring Elementary	Nancy Kline	Assistant Principal	6	September 2, 2004
Southwest Academy	Denise Thomas	Special Educator	10	September 13, 2004
Southwest Academy	Denise Thomas	Special Educator	4	October 25, 2004
Sparks Elementary	Melissa Fanshaw	Assistant Principal	6	September 24, 2004
Sparrows Point High	Alvina Danna	Special Education Department Chairperson	5	October 18, 2004
Sparrows Point Middle	David Lige	Special Education Department Chairperson	5	September 2, 2004
Stemmers Run Middle School	Judi Grewell	Special Education Department Chairperson	13	October 5, 2004
Summit Park Elementary	Sharonda Gregory	Assistant Principal	6	September 23, 2004
Timber Grove Elementary	Stacy Durkovic	Assistant Principal	5	October 13, 2004
Victory Villa Elementary	Robin Gladstone	Speech Language Pathologist	4	November 29, 2004
Warren Elementary	Sue Eisenhart	Principal	3	February 23, 2005

**BALTIMORE COUNTY PUBLIC SCHOOLS**  
**THIRD PARTY BILLING STAFF DEVELOPMENT TRAINING SESSIONS**  
**2004-2005 School Year**

School Name	Contact Person	Title	Number of Staff Trained	Date of Meeting
Wellwood International Elementary	Adell Cothorne	Assistant Principal	4	October 14, 2004
Westchester Elementary	Karen Bevers	Assistant Principal	6	September 27, 2004
Western School of Technology	Karen Hickman	IEP Chairperson	5	September 10, 2004
Westowne Elementary	Patricia Vogel	Assistant Principal	8	November 11, 2004
White Oak School	Marcella Savage	Assistant Principal	26	September 21, 2004
White Oak School	Marcella Savage	Assistant Principal	25	September 23, 2004
Winand Elementary	Robin Rupperecht	Assistant Principal	7	October 7, 2004
Winfield Elementary	Marsha Brett	Assistant Principal	9	October 13, 2004
Woodlawn High	Nettie Jackson	IEP Chairperson	9	September 13, 2004
Woodlawn Middle	Alice Jones	Special Education Department Chairperson	14	August 11, 2004
Woodmoor Elementary	Janis Wasser	IEP Chairperson	6	October 28, 2004
		<b>Total Staff Trained</b>	<b>875</b>	

# Baltimore County Public Schools Case Management Services Provided to Students by Type 2004-2005 school year



**BALTIMORE COUNTY PUBLIC SCHOOLS**  
**THIRD PARTY BILLING**  
**School Based Training Session Evaluation**  
**SUMMARY**  
**2004-2005**

	<b>YES</b>	<b>NO</b>
1) Was this training session beneficial to you? If not, how could it be improved?	525	1
2) Has the training session clarified your Third Party Billing responsibilities? If not, what is still confusing?	519	5
3) Have you gained additional knowledge about Third Party Billing as a result of this session?	520	5
4) Was the presenter knowledgeable about the subject?	519	
5) Did the presenter answer all of your questions? If not, please list your questions.	512	7
6) Do you feel that the Case Management Training Manual is user friendly and will serve as a resource to you? If not, how can it be improved?	517	2

Overall, how would you rate this training session? (*please check one of the boxes*)

Excellent **433**    Good **84**    Average **8**    No Rating **5**    Total surveys **530**

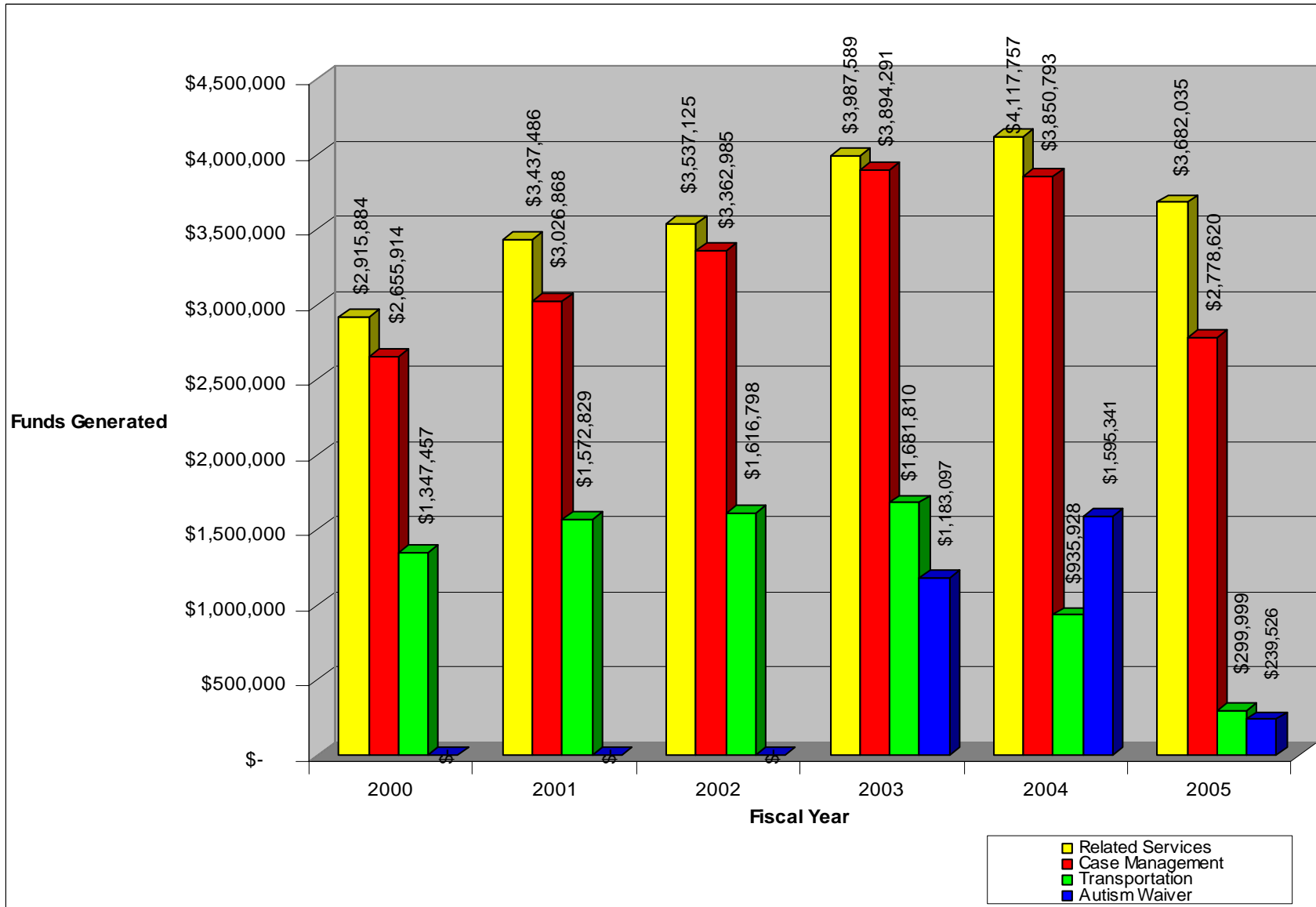
**COMMENTS & SUGGESTIONS (SUMMARY):**

- *Thanks for getting us off to a good start. (5)*
- *Nice job as usual.*
- *The school-based training sessions are undoubtedly a lot of work for the staff of Third Party Billing but very worthwhile. Thank you!*
- *It would be very helpful to have the entire process online via internet. Hopefully, within the very near future.*
- *Mr. Tyler handled the meeting in a professional manner. He patiently answered all questions. Teachers found the session helpful. The manual is comprehensive. (5)*
- *First of all, it is always nice when Charles comes to visit. As a Speech and Language Pathologist (SLP), I thought I understood all there was to know about Third Party Billing and the recent changes. Our small group of Q & A clarified several items for me. I now understand the different items that there are to select from for case management. I am pleased that Charles is supporting the SLP's request for assistance with paying for our licenses.*
- *The presenter is extremely knowledgeable and professional. (32)*

- *Not enough “turn around time” given to us as case managers to get the “forms” out to parents and returned!*
- *Charles did a great job. He is very informative and his sense of humor only adds to his success. (10)*
- *All the staff in the Third Party Billing Office is so nice and helpful when you call with a question! ( 6)*
- *My questions were clearly answered and Charles was very knowledgeable about the Third Party Billing process. (12)*
- *The training was beneficial. It was important to receive the updated changes in person and be able to ask questions and have them answered/clarified immediately. (85)*
- *So helpful and straightforward. (3)*
- *The manual is clear and informative.*
- *There should be a separate training session for people who have never been responsible for Third Party Billing. (5)*
- *We as teachers do not need more things to do as far as paperwork. Too time consuming! DO NOT LIKE IT! ( 3)*
- *I knew very little about this before the training. I feel well equipped to speak intelligently about it now. You also presented it in a very user-friendly manner. Thank you! (9)*
- *Thank you for all your help and thanks to your staff. We are trying to remember everything.*
- *Charles always gives good information to clarify our confusion. He also told us some things that we hadn't heard, like keeping confidential copies if a student leaves the county.*
- *My whole department felt very positive about the time spent on the training.*
- *The presentation was extremely helpful, well paced, to the point and answered all our questions. Thanks for your continuing support. (10)*
- *We needed more time.*
- *I liked the freebies!*
- *This session was critical to our need for updated information on new protocols. (15)*
- *This was my first introduction to Third Party Billing so everything was beneficial. Mr. Tyler was an amazing reference. He had everything in his head.*
- *Necessary information, well presented. Charles was extremely thorough and knowledgeable.*
- *Charles did an outstanding job of presenting rather boring subject matter in a humorous non-threatening way. He is very knowledgeable about Third Party Billing and the case management process. (4)*
- *My case managers received invaluable information that will enable them to become more proficient with their Third Party Billing responsibilities.*
- *As always, the delightful presenter was informative. He answered all our questions and he was brief – also an asset! (10)*
- *Thanks Charles! (2)*
- *Thanks for the blue pens!! They always come in handy.*
- *Please do a training session for all special education folks during the week before students arrive. That way questions can be addressed before forms are filled out incorrectly and have to be re-done.*
- *I felt very confident after the training due to the fact that the presenter was so knowledgeable about the subject.*
- *Good and to the point.*
- *Charles knows what he is talking about.*
- *Great job! (5)*

- *The new requirements (time involved in encounters) license number, case management letter, etc. were made very clear. Accurate record-keeping was emphasized and possible monetary consequences (to the county) were made clear. (2)*
- *My knowledge of Third Party Billing is spotty. The manual and information will assist me considerably. (5)*
- *Charles always presents the information in a clear, concise fashion with humor to assist via e-mail or phone.*
- *We enjoyed the treats!*
- *I appreciate Mr. Tyler's continued efforts to keep us informed and reduce duplicated paperwork as much as possible.*
- *New requirements for listing alternate case manager are not entirely clear to me.*
- *The summary of the meeting is very helpful.*
- *Thanks for your continued support and assistance. (32)*
- *As the administrator working in special education, I learned a great deal about what is required for Third Party Billing. It will help me provide support for the faculty doing the forms.*
- *These meetings are beneficial to us since it give us the opportunity to clarify procedures in relation to Third Party Billing. (3)*
- *Third Party Billing has been significantly changed with the addition of billing services by time spent. Charles does an excellent job every year of explaining all changes in billing and helping us understand why every item is so important. (15)*
- *The training was very helpful because we were able to ask our school-specific questions.*
- *Charles always give the reasons and sympathy for procedures, changes, etc. in Third Party Billing. He gives great directions in a relaxed, calming manner. It's great to have somebody remove stress!! We love his treats too! (2)*
- *I like when I call the office and there is someone "live" who can answer and clarify questions.*
- *Just give me my names, I'll fill it out! This just seems to be a little extra written work.*
- *Due to all of the changes made during the summer; I think it would be beneficial for all schools to have the training. Charles answered questions specific to our school and the teacher's questions were answered. (2)*
- *I need a contact person in case I have any further questions.*
- *Excellent Job!( 15)*
- *The training provided an excellent opportunity for follow-up questions to be answered and provided. A purpose for why we must do certain things. This you can only get in face-to-face meetings. (7)*
- *A minor thought – sometimes when you're presenting a new concept or requirement, you move ahead a little too fast/ before I fully understand what you are saying. Overall, a very good job!*
- *Thanks! (25)*
- *Prior to the new procedures beginning, training should have been conducted.*

**Baltimore County Public Schools  
Office of Third Party Billing  
Funds Generated by Program by School Year**



**ACTION PLAN**  
**FOR USE OF THIRD PARTY BILLING CASE MANAGEMENT FUNDS**

SCHOOL NAME: \_\_\_\_\_ SCHOOL #: \_\_\_\_\_

Goal #	Indicator #	Strategy #	Items or Contractual Employee Requested	Budget Amount Requested
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

- If additional space is required, please attach additional sheets
- If requesting a contractual employee, see **Step IC** for cost calculation

**TOTAL AMOUNT REQUESTED** \_\_\_\_\_

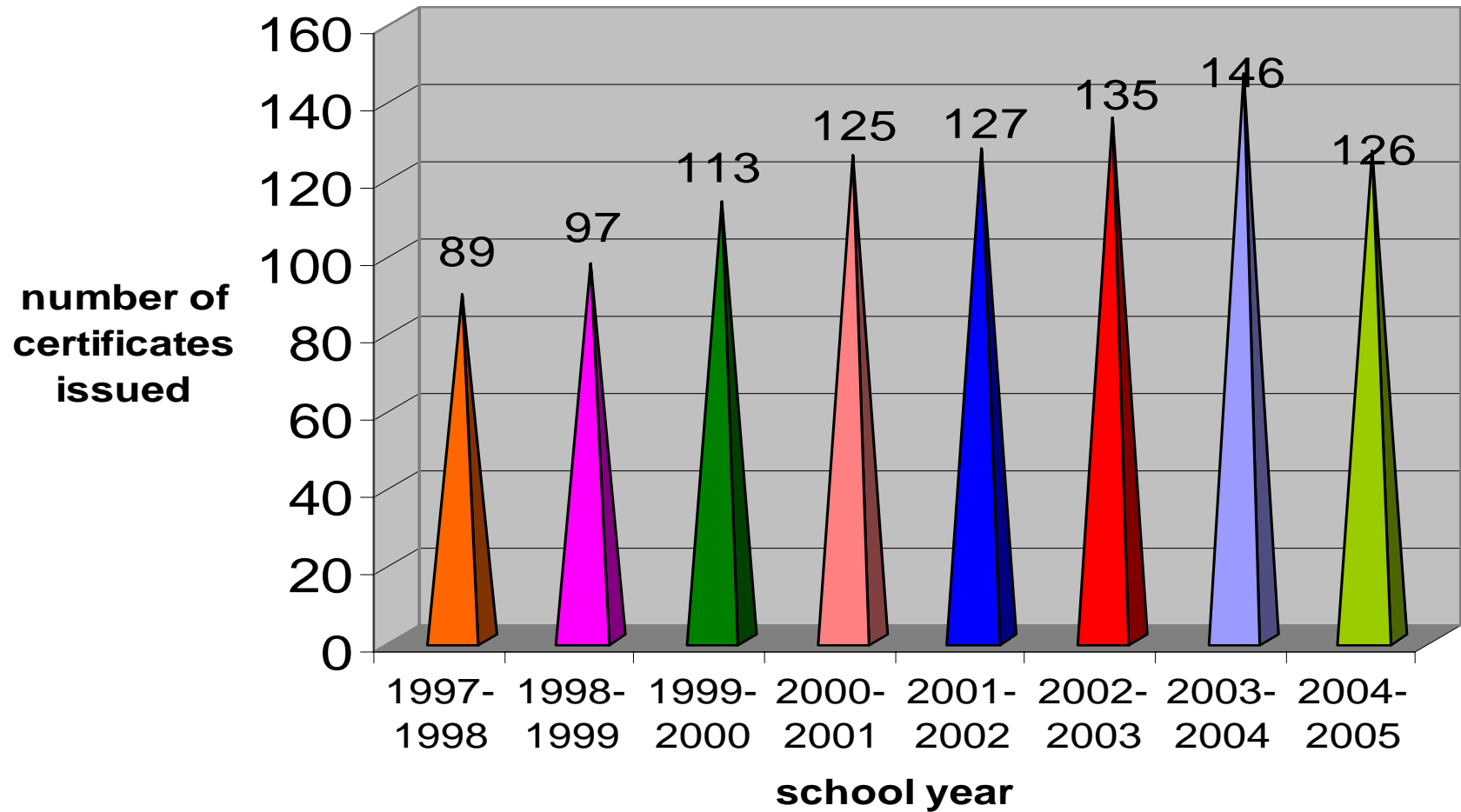
Please describe, in narrative form, how the items and/or contractual employee position requested will be used to support, expand, and enhance **special education and/or health related services** in schools.

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

_____ Print Principal's Name	_____ Executive Director of Schools	Approved <input type="checkbox"/> Returned <input type="checkbox"/>	_____ Date
_____ Principal's Signature	_____ Office of Third Party Billing	Approved <input type="checkbox"/> Returned <input type="checkbox"/>	_____ Date



## Number of Schools Receiving the Third Party Billing Certificate of Achievement



BALTIMORE COUNTY PUBLIC SCHOOLS  
 OFFICE OF THIRD PARTY BILLING  
 Case Management Activity Detail Log

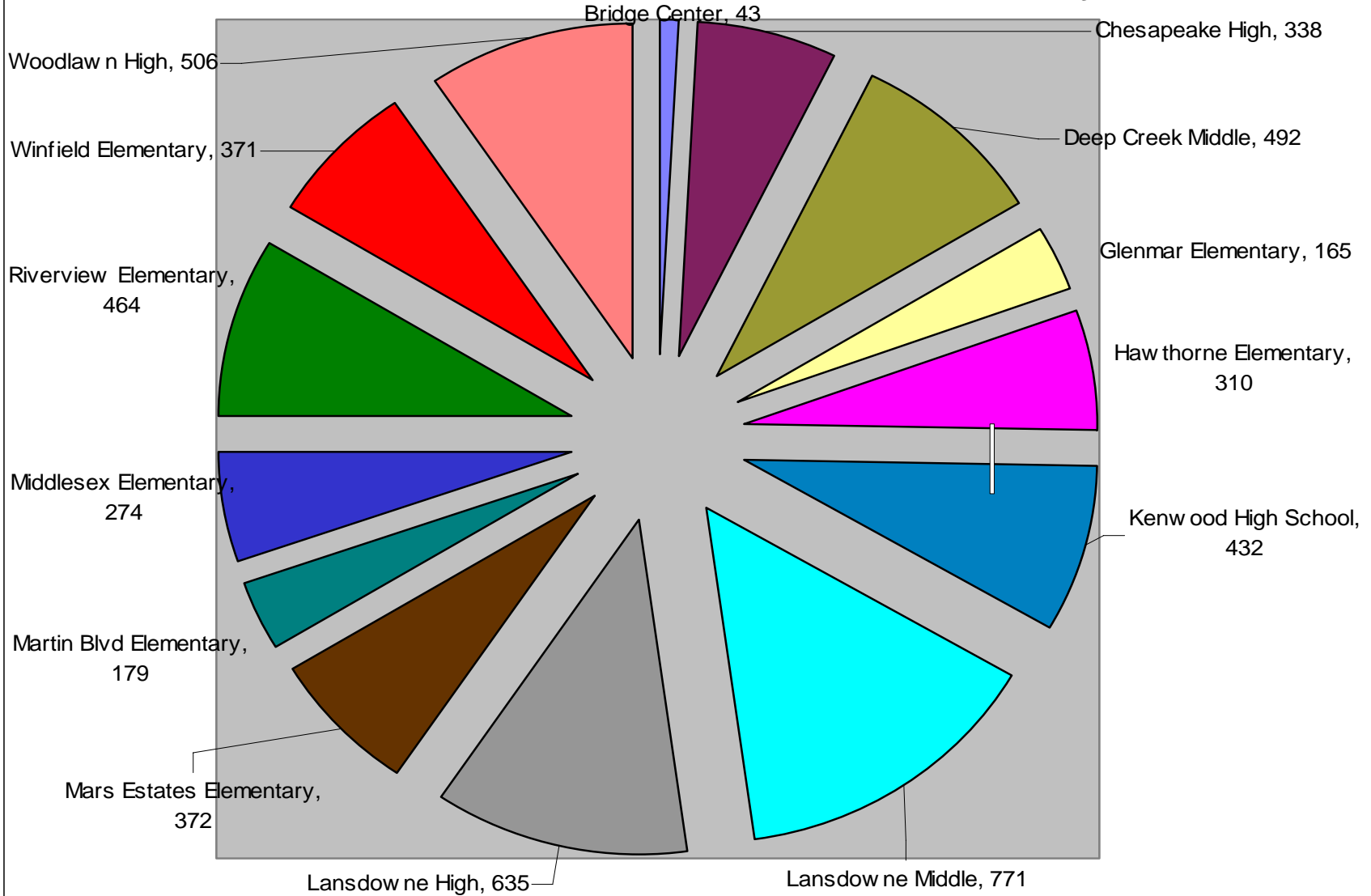
Student ID#		Student Name	School Name	
Date	Outcome Statement	Comments	Case Manager	Credentials

**Outcome Statements**

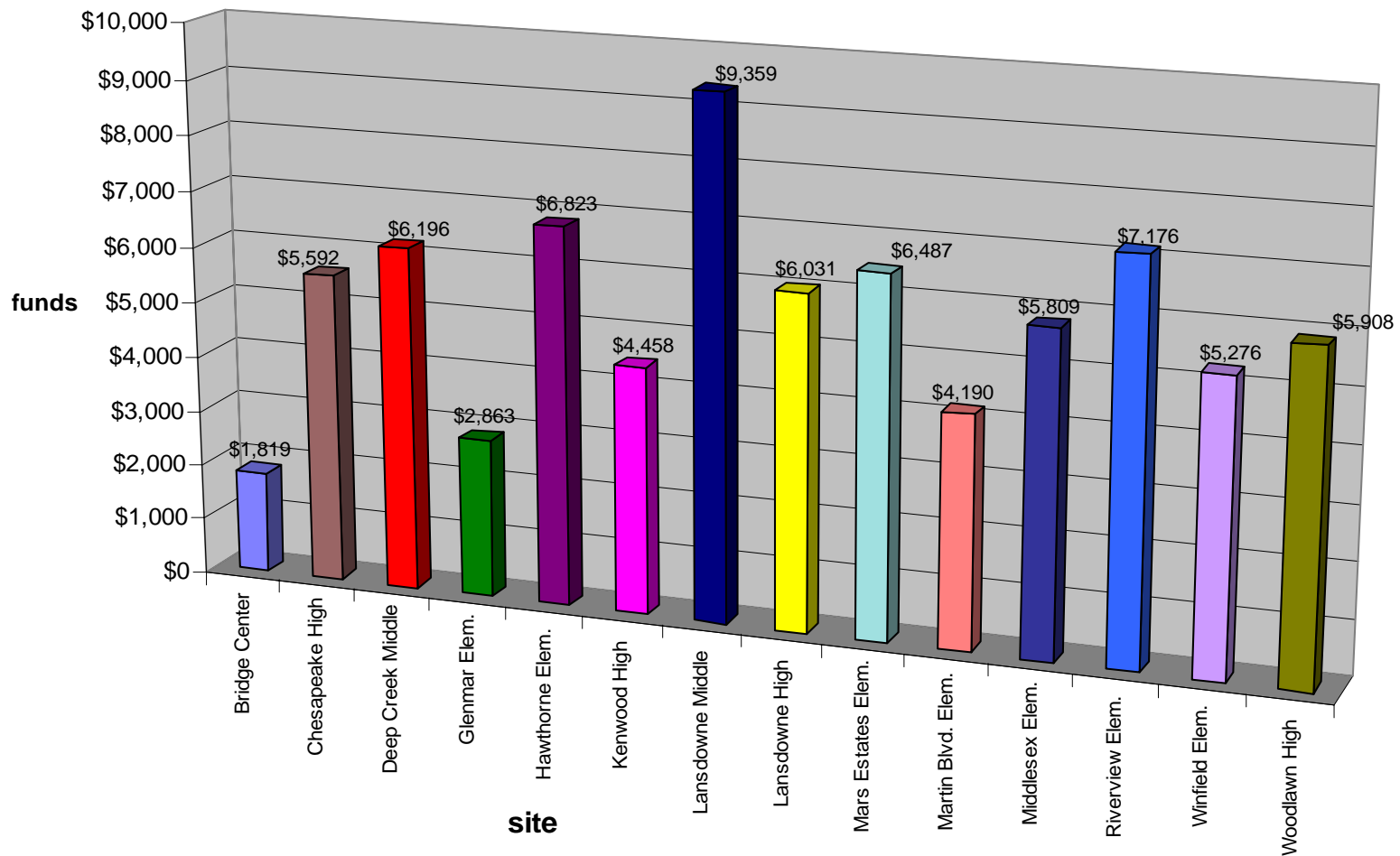
- A. Meeting with child regarding progress.
- B. Written note sent home to parent/guardian regarding child's progress.
- C. Telephone call to parent/guardian regarding child's progress.
- D. Email contact with Parent/Guardian.
- E. Consulted with team members-progress/follow-up note sent home with child to parent/guardian.
- F. Meeting held with parent/guardian with child present regarding progress.
- G. Other: This statement must indicate the following: parent/guardian contacted, nature of contact, and any follow-up action.  
 The case manager must be the person making the contact.

PLACE IN STUDENT’S PERMANENT RECORD AT THE CLOSE OF THE SCHOOL YEAR,  
 OR WHEN THE STUDENT TRANSFERS TO ANOTHER BCPS SCHOOL.

# School-Based Health Center Visits 2004-2005 school year



## Funds Generated by SBHC 2004-2005 school year



**Baltimore County Public Schools  
Autism Waiver Services Provided by Type  
2004-2005 School Year**

Periodic Autism Waiver  
Assessment  
16%

Initial Autism Waiver  
Assessment  
0%



Monthly Ongoing Autism  
Waiver Case Management  
84%