Commonwealth of Pennsylvania
Department of Human Services

MATP Quarterly Administrators Session

July 26, 2023

Throughout the agenda, we'll be taking a Live Poll to get your real time perspective on different topics.
Get Ready Now!

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Welcome!

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Please make sure your microphone is muted when not speaking

During the presentation, please feel free to add your questions in the chat window

During the Q&A session, please use the 'raise hand' feature to ask a question –or continue to utilize the chat

TEAMS GUIDE

Post Q&A

Raise Hand

Camera (on/off)

Mute (on/off)

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Welcome & Overview

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Purpose

Provide a regular forum to share program and fiscal information with MATP administrators and gather feedback from participants.

Gain knowledge, receive and/or provide technical assistance and increase connections across the MATP network.

Hosts

- Gwendolyn Zander, Bureau Director, Managed Care Operations
- Tammi Carter, MATP Program Director
- Daphne Simeonoff, MATP Program Supervisor
- Amy Brandt, Director, Division of Budgets and Contracts
- Danielle Spila, Bureau Director, Public Transportation
- John Taylor, Mass Transit Manager, Bureau of Public Transportation
- Chris Stout, MATP Program Monitor
- Maribel Torres, MATP Program Monitor

Topics for future calls will vary and continue to be responsive to questions and feedback from participants. Suggestions are welcomed!

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Agenda

Quarterly Administrators Call

Welcome and Overview	Administrative Discussion	Spotlight Presentation	BFM Updates	PennDOT Updates	Administrative Discussion	Questions and Answers
Purpose of the Quarterly Administrators Call	Program Standards Reviews (PSR)	PSR: Recent Experience	BFM Reporting	MATP Mileage Reimbursement	• Written Notices, Referrals, and Methadone Exceptions • Se.GOV Review • Post Call Survey Results	Open Discussion

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Administrative Processes
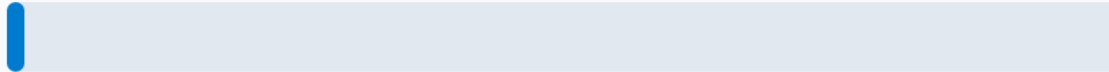
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How familiar are you with the MATP S&G? (Responses are Anonymous)

Very Familiar

Familiar

Somewhat Familiar
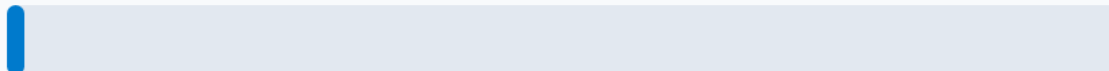
Not Very Familiar
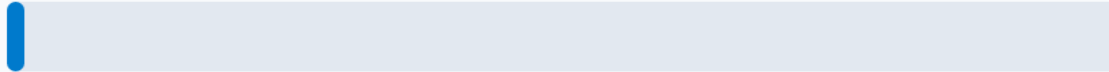
Legend: Very Familiar, Familiar, Somewhat, Not Very

Pie chart: 69% Very Familiar, 23% Familiar, 4% Somewhat, 4% Not Very
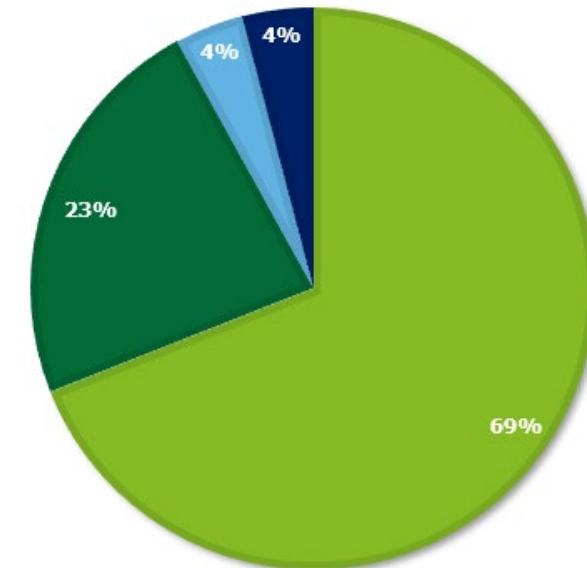
Participants: ~28

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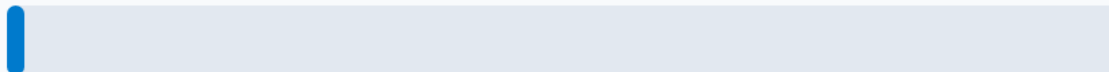
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What is the Program Standards Review (PSR)?

A PSR is a review conducted by your DHS MATP Program Monitor and county MATP program administrators/providers. This review will cover your existing MATP services and determine the current state of alignment with the MATP Standards and Guidelines.

What is the goal of the process?

The main goal of the PSR is to optimize MATP service delivery to identify:

1. Areas of Strength

2. Areas for Improvement

3. Areas for Additional DHS MATP Support

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When will this process begin?

A phased roll-out will begin in Fall 2023 and continue throughout Summer 2025. To initiate, we will start with a small group of 4-6 counties. Those selected will be notified in August 2023.

What will be my role as a MATP program administrator/provider in the process?

1. Provide supporting documentation to support MATP S&G adherence

2. Attend a scheduled virtual kick off meeting and on-going progress update meetings

3. Coordinate virtual/in-person on-site visits (If Necessary)

4. Incorporate recommendations on areas of improvement

5. Serve as a mentor/guide to others going through a PSR (Optional)

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Spotlight: County Monitoring

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Informal Baseline Review

Our Intentions Are…

- To establish a baseline
- To celebrate best practices
- To create actionable ways to continuously improve
- To work collaboratively
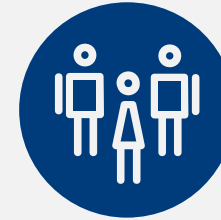
Our Intentions Are Not…

- To have a "gotcha" moment
- To focus only on deficiencies
- To expect immediate improvement/change
- To work against your program

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County Program On-Site Visit

- **Forms and policies** were on hand, but supplied electronically after

- Lasted from early morning until slightly after lunch

- **Monitoring Tool dictated topics**, but conversation flowed naturally:
  - Based on current **Standards & Guidelines**
  - Allowed for **compliance determination** of specific Standards and overall program

- Certain Standards were highlighted as most important prior to visit

Visit Follow-Up

- All **notes were complied** along with policies and forms

- **Electronic copies of forms and policies** supplied

- DHS **discussed** findings:
  - **S&G Compliance determinations** were made
  - Not all Standards were relevant
    - For Example, not all programs use volunteers
  - **Best practices identified**

- DHS created a **Visit Report**
  - **Summary** of program
  - **Concerns**
  - **Action Steps/Follow-Up**

- Meeting with Program was held to discuss Report and Action Steps

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Based on what you just learned about the MATP Program Standards Review, select the option below on how prepared you feel to support this initiative. (Responses are anonymous)

Prepared

Somewhat Prepared

Not Prepared

Unsure of Current Level of Preparedness

Prepared   Somewhat Prepared

Not Prepared   Unsure

8%

38%

54%
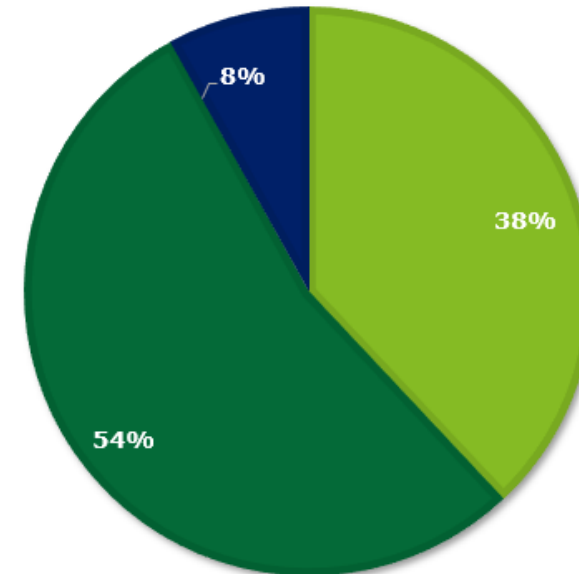
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Updates: BFM

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Financial Reporting Update & Deadline Reminders

As we wrap up the fiscal year and enter the new one, we wish to remind everyone of the reporting deadlines that play a pivotal role in allocating proper funding for the MATP Program.

Reporting Expectations

Our primary focus is accurate and timely reporting from all counties. This is integral to our operations, and throughout the year we will collaborate with the MATP Program team to monitor financial data submitted

Value Add & Impact

Collaboration will not only streamline our processes but also help counties avoid the need for multiple data submissions

This approach:

- Increases efficiency
- Streamlines operations
- Improves communication
- Promotes data consistency

Timeline

Reporting & Agreements	Deadlines
County Budget Projections	Occurs annually **between the months of March and May**
Initial Allocations & Grant Agreements	Signed Allocation and Grant Agreements are due in by **08/31 of each year**
Quarterly Cost Reporting	Each cost report is due the last day of the proceeding month after a quarter ends, apart from Q4 which is due 2 months after the quarter ends
Quarter 1	**Due 10/31 of year**
Quarter 2	**Due 01/31 of each year**
Quarter 3	**Due 04/30 of each year**
Quarter 4	**Due 08/31 of each year**
Monthly Trip Data	**Due 45 days after the reported month has ended**
Reconciliation	Due 08/31 of each year
Broker Reporting	Due monthly
Sole Source Reporting	Due monthly

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Q&A

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Updates: MATP Mileage Reimbursement

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The Pennsylvania Department of Transportation (PennDOT), in partnership with the Pennsylvania Department of Humans Services (DHS) and the Pennsylvania Public Transportation Association (PPTA), submitted a grant application to the Federal Transit Administration (FTA) for the 2021 Innovative Coordinated Access and Mobility (ICAM) grant.

This project will focus on creating a new web-based application for managing mileage and fixed route fare reimbursements for human service transportation programs.

The three major goals of the project will be to:

1. Create a simple and accessible statewide process for consumers participating in these reimbursement programs.

2. Provide a tool to the local organizations administering these programs that improves their ability to detect fraud, waste, or abuse while decreasing their total number of manhours spent on oversight.

3. Create a consistent and accurate statewide reporting process for DHS that funds these programs.

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Proposed Process Flow

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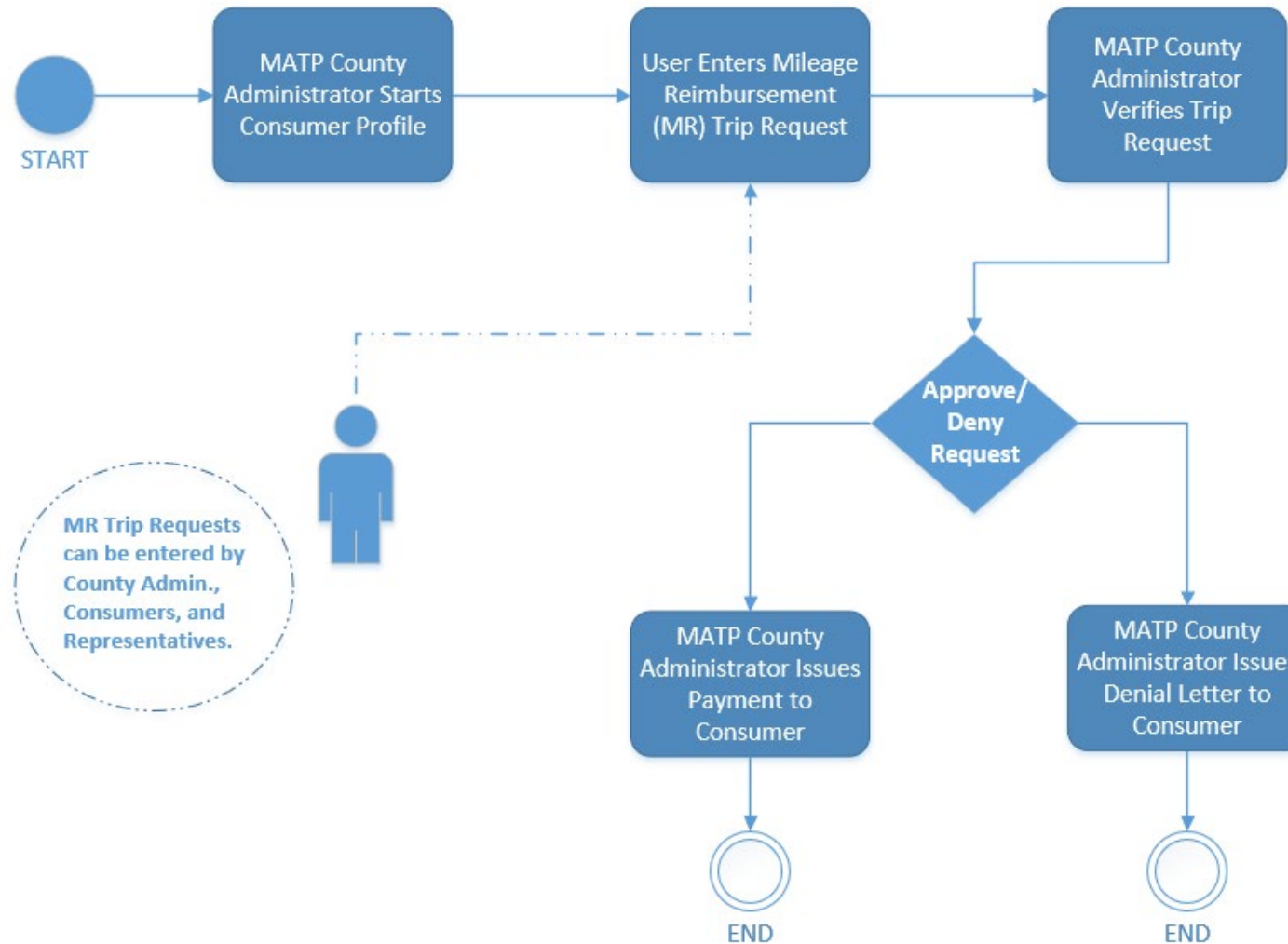
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User Type	Description	User Access	Process Starts
Consumer	Recipient of benefits through the MATP Mileage Reimbursement Program	Keystone Login	**Step 8** – User selects to enter Mileage Reimbursement Trip Request.
Representative	Individual who represents someone who is a recipient of benefits such as a parent or guardian	Keystone Login	**Step 8** – User selects to enter Mileage Reimbursement Trip Request.
Business Partner	Individual who works for an organization that is an approved DHS business partner such as a Dialysis Provider or Methadone Clinic	ESEC Login	**Step 8** – User selects to enter Mileage Reimbursement Trip Request.
MATP County Administrator	MATP County Administrator who will have the ability to enter trip information, review trip requests, and approve or deny trip requests	ESEC Login	**Step 1** – User starts the process by creating a consumer profile.

DHS users will also have the ability to access the system for monitoring purposes.

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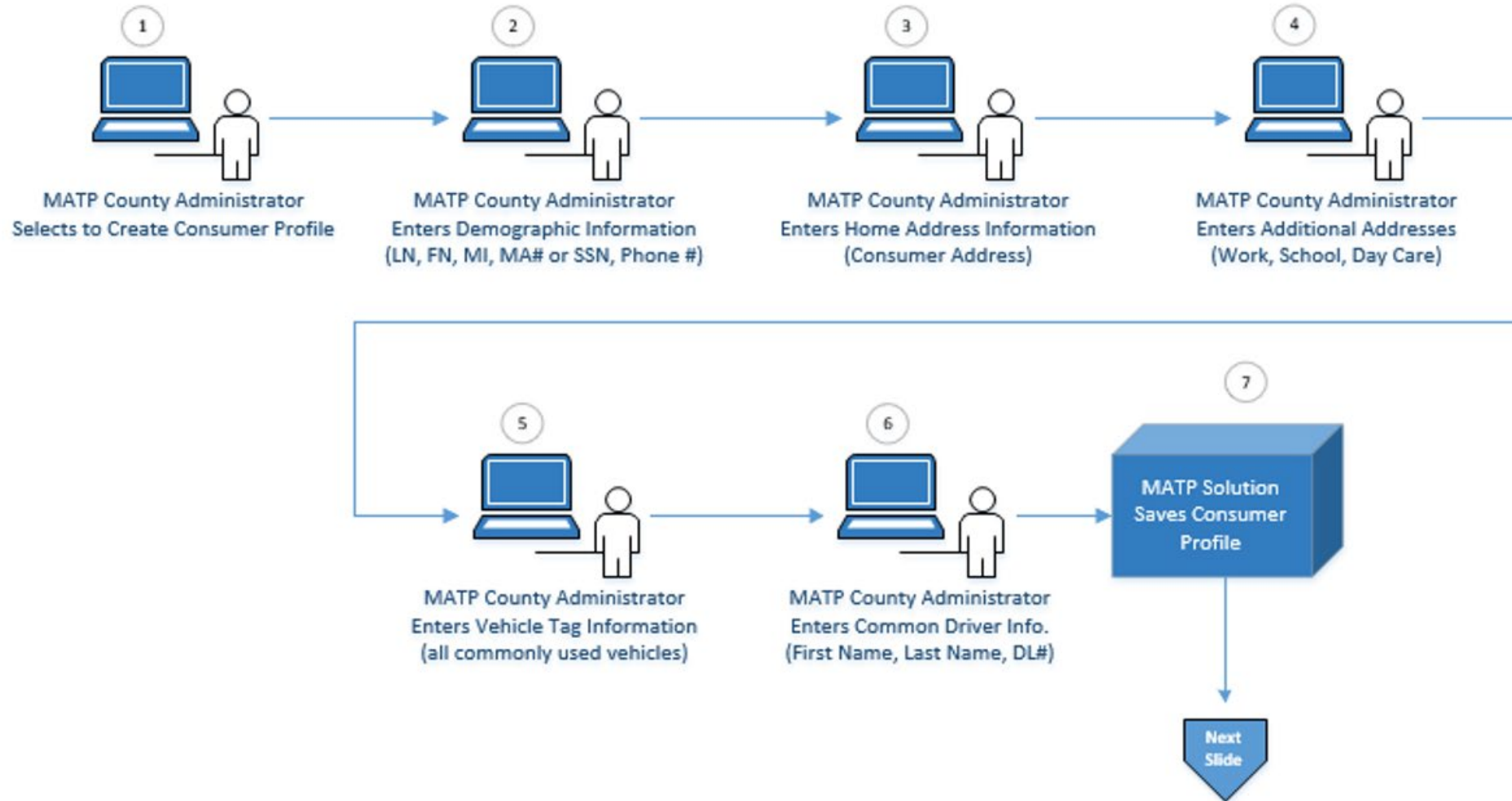
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Trip Request Record Processing

System will flag records using county-based rules.

- System will look at county-based rules table for flag conditions:
  - First look at provider, if on frequent provider list, no flag needed, continue. If not on list, look at service type mileage threshold.
  - If service type mileage threshold is set and is exceeded, flag record. If not set, look at default mileage threshold for the county. If exceeded, flag record.
  - If record is within service type threshold (if set) or default threshold, continue processing, no flag set.
  - System will flag records that are similar based on entered data fields.
- MATP County Administrators will have the ability to review flagged records and add comments.
- MATP County Administrators will have the ability to upload documents to support comments.
- System will hold trip records in a queue for payment processing based on state determined schedule.
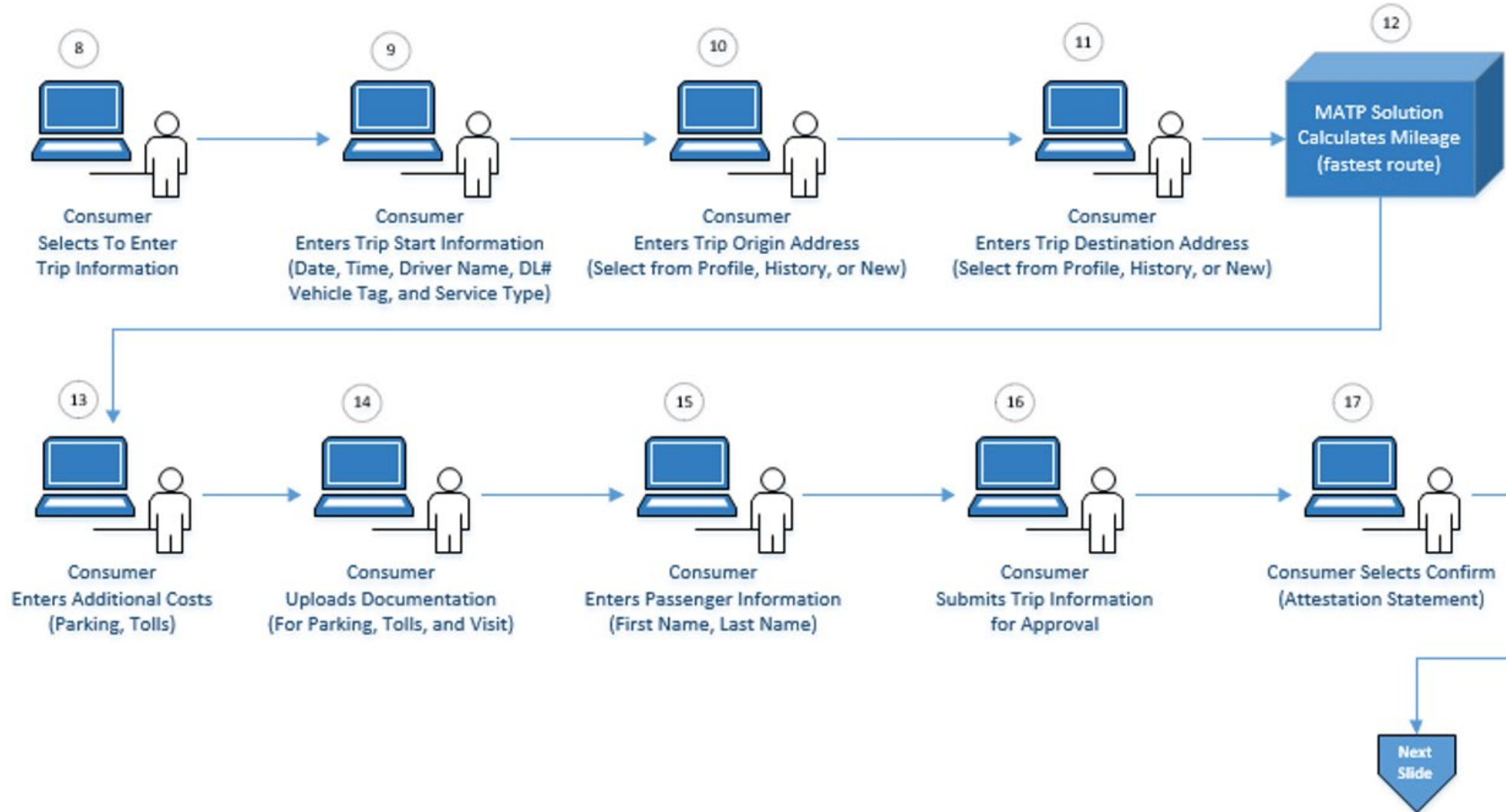- System will apply business rules specific to methadone exception request processing.

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22 — County Reviews and Verifies Trips (Enters Notes As Needed)

Approve or Reject?

APPROVE → 24 — MATP System Processes Reimbursement → END

REJECT → 23 — MATP System Generates Denial Letter → END

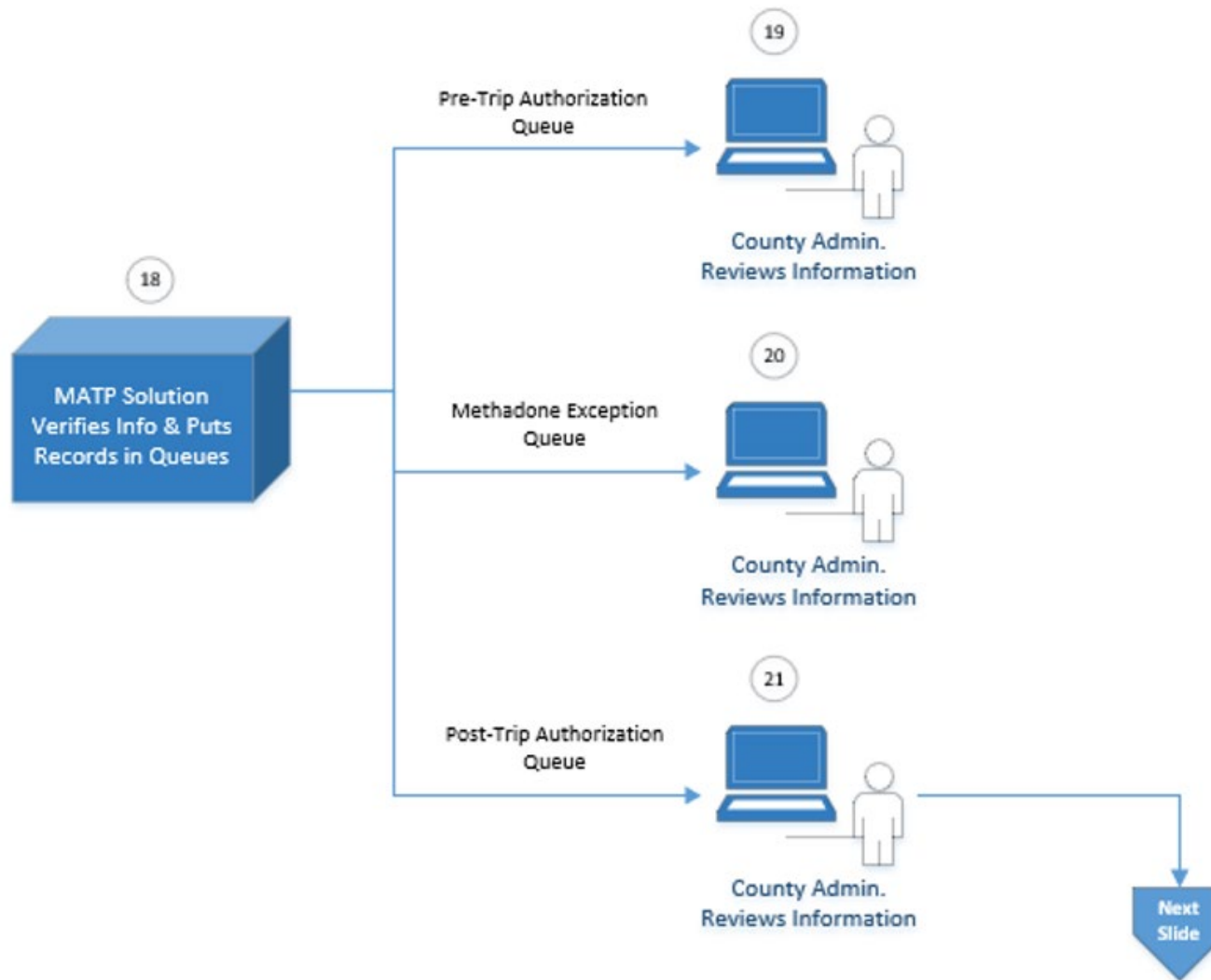You can participate in the poll by going to PollEv.com/matpqacall or by texting *matpqacall* to **22333** to respond.
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Q&A

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Administrative Processes

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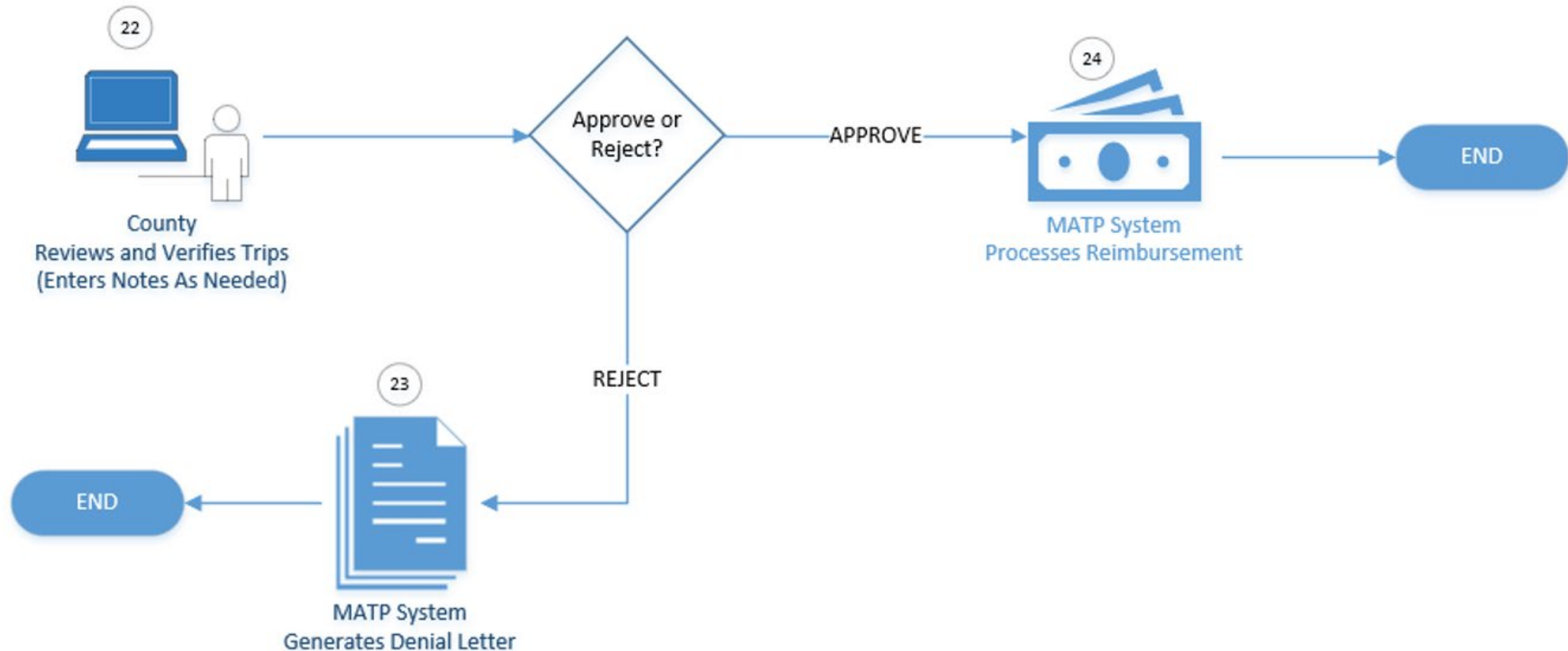For Q&A you can post in the Chat throughout today's presentation

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A written notice **must** be sent to a consumer whenever a program denies, reduces or terminates the consumer's request for transportation except in the instance of service denial due to MA ineligibility or when the consumer requests a trip to a nonmedical service. **Reference 1**

Written Notices Must Be...

1. Sent to the county DHS Program Monitor for review **before** they are issued to the consumer
2. Completed on the electronic form and forward it to the DHS Program Monitor via email
3. Issued to the consumer in a timely manner after review by DHS MATP. Delays will affect the appeal process timeline.

Appeals Requests Must Be...

1. Returned to the county MATP by the consumer
2. Stamped with date of receipt to your office
3. Forwarded to DHS MATP Office immediately either electronically to ra-matp@pa.gov or by mail at the address on the bottom of the second page of the form

If you have a question about whether to issue a written notice, contact your county DHS Program Monitor.

Reference 1 *"When the Grantee denies, reduces, or terminates a consumer's request for transportation, the Grantee shall send the Department's standard written notice form explaining the reason for the denial and informing the consumer of the right to appeal." MATP S&G Rev. 11/2016 Page 37*

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MATP OPS Memo # 11/2022-001 was issued on November 30,2022 notifying MATP Agencies of the **revised referral process** to be used when a request for transportation cannot be provided through the MATP and efforts have been made to seek possible local resources.

Referrals Must Be sent to the county DHS Program Monitor for review **before** they are forwarded to the Managed Care Organization (MCO), Community Health Choices (CHC-MCO), or County Assistance Office (CAO)

After the referral has been reviewed by the DHS Program Monitor and returned:

1. Referrals for all Consumers with MCO or CHC-MCO services must be first sent to their MCO or CHC-MCO for review
2. If the MCO or CHC-MCO deny the services, the referral will then be forwarded to the County Assistance Office
3. Referrals for Consumers covered by Fee For Service should be sent to the CAO

When Services Are Denied, Suspended, or Terminated a **Written Notice** should be sent to the Consumer when a referral is made.

If you have a question about whether to issue a written notice, contact your county DHS Program Monitor.

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A methadone clinic exception request can be made by an MATP Agency on behalf of the Consumer. This is done by completing the Consumer Methadone Exception Clinic Request (which explains the reason they need to travel to a more distant clinic), attaching documentation and forwarding it to DHS.

- Methadone Exception requests should not be sent to the CAO.
- If the closest Methadone Clinic to the consumer's home is out of county, the transportation should be provided to that clinic by MATP. This would not require an exception.
- A program can make a Methadone Exception Request if it is less costly to group multiple Consumers and transport them together. DHS can provide guidance with the process.

If you have a question about methadone clinic exception requests, contact your county DHS Program Monitor.

Reference 2 *"The MATP Grantee shall only coordinate paratransit and mileage reimbursement trips for MA consumers up to the distance of the closest in-network methadone clinic or substance abuse program to a consumer's residence."* MATP S&G Rev. 11/2016 Page 163.

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Administrative Processes:
Se.GOV Process

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To submit a monthly MATP Trip Report:

- Must have a *secure connection* with PA Department of Human Services
  - Counties may have *up to 2 people* activated in the system
  - To be activated in the system, you must complete the *SeGOV User Registration Form*

- To modify a User, you must complete the *SeGOV Registration Change Form*

- Both forms are on *matp.pa.gov* under the *For Providers > Provider Forms tab*

SeGOV User Registration Form
Request for New Managed Domain Account for Business Partner

Field	Value	Notes
OU		To be completed by OIS Account Administration
Last Name		Mandatory - Last Name of User being Registered
First Name		Mandatory - First Name of User being Registered
Do you currently have an SeGov PA-DHS UserID?		Mandatory - Select Value from from Drop Down List
If Y - please provide ID(s):		Mandatory - If Y above
Account	b-	Completed by OIS Account Administration
Password		Completed by OIS Account Administration
Phone Number		Mandatory
Phone Number 2		Optional
Email Address		Mandatory
EVS Provider Number		Mandatory - Provider Number + Location Code (13 Digits)
User IP Address		Mandatory - (often www.whatismyip.com)
DHS moveitprogram		Mandatory - See Drop Down List
DHS moveitsubfolder		**Enter County Name** for which you are providing services For a joined Counties please enter primary County
Enable Account	Yes	OIS Account Administration will enable upon completion
Environment		Select Value from Drop Down List: Production, Test, or Both
Type of Connection		Select Value from Drop Down List: Browser, FTP, SFTP, FTPS
Agency FEIN		Mandatory - Federal FEIN
Organization Name		Enter Entity Name which matches the FEIN
Organization DBAs		Enter Name(s) Entity is also doing business as (DBA)
Business Address		Address 1 Address 2 City, State, Zip
Organization Description		Select Value from from Drop Down List
Expires	Yes	90 day expiration of all passwords, User to create answers to hint questions for password reset and account unlocking

User IP Address	Please consult your Technical person or Internet Service Provider.
FEIN	*This is the Federal Tax ID assigned to the entity*
Environment	Default environment is Production, please indicate if test or both are required
FTP Accounts	FTP Accounts will be issued machine service accounts that begin with b-srv

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Review of Se.GOV User Registration Form

SeGOV User Form **Request for New Managed Domain Account for Business Partner**		
Criteria	**Completed by User** **(as applicable)**	**Instructions**
OU		To be completed by OIS Account Administration. **Leave blank**
Last Name	Maribel	Mandatory - Last Name of User being Registered
First Name	Torres	Mandatory - First Name of User being Registered
Do you currently have a SeGov PA-DHS UserID?	No	Mandatory - **Select Value from Drop Down** List; Options are Yes, No, Not Sure
If Y - please provide ID(s):		Mandatory - If Y above. **Leave blank if you don't have one. Fill out your b-username if you have one for another DHS program**
Account	b-	Completed by OIS Account Administration: **Leave blank**
Password		Completed by OIS Account Administration: **Leave blank**
Phone Number	717-772-6873	Mandatory
Phone Number 2		Optional
Email Address	martorres@pa.gov	Mandatory

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Review of Se.GOV User Registration Form

SeGOV User Form Request for New Managed Domain Account for Business Partner		
Criteria	**Completed by User (as applicable)**	**Instructions**
EVS Provider Number	(123456789) (0001)	Mandatory - Provider Number + Location Code (13 Digits)
User IP Address	123.22.33.123	Mandatory - (often www.whatismyip.com)
DHS moveitprogram	MATP	Mandatory - **See Drop Down Choices are:** Aging, BFO, Childline, DOI, FTP, Liheap, MATP, MHMR, OCYF, OCDEL, ODP, OIM, OMAP, OMHSAS, PROMISe, TPL, TSM
DHS moveitsubfolder	Greene	Enter County Name for which you are providing services For a joined Counties please enter primary County
Enable Account	Yes	OIS Account Administration will enable upon completion
Environment	Production	Select Value from **Drop Down List: Production, Test, or Both**
Type of Connection	Browser	Select Value from **Drop Down List: Browser, FTP, SFTP, FTPS (Please let us know if you using a Cloud service and which one)**
Agency FEIN	22-123456	Mandatory - Federal FEIN **(Federal Tax ID #)**

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Review of Se.GOV User Registration Form

SeGOV User Form Request for New Managed Domain Account for Business Partner		
Criteria	**Completed by User (as applicable)**	**Instructions**
Organization Name	Greene County	Enter Entity Name which matches the FEIN
Organization DBAs		Enter Name(s) Entity is also doing business as (DBA)
Business Address	123 Locust Lane Greene, PA 17555	Address 1 Address 2 City, State, Zip
Organization Description	Contractor for PA DHS	**Select Value from Drop Down List Options: County Transit Authority, Contractor for PA-DHS, Contractor for Transit Auth**
Expires	Yes	90 day expiration of all passwords, User to create answers to hint questions for password reset and account unlocking
User IP Address	Please consult your Technical person or Internet Service Provider. **We need to know the IP address that will come through the OA Firewall at the Commonwealth.**	
FEIN	This is the Federal Tax ID assigned to the entity	
Environment	Default environment is Production, please indicate if test or both are required	
FTP Accounts	FTP Accounts will be issued machine service accounts that begin with b-srv **These accounts will be manually created in AD with DPWmoveitsubfolder being added by OIS account administration. DPWmoveitprogram attribute is FTP.**	

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SeGOV Registration Change Form
Request for New Managed Domain Account for Business Partner

	Current Information	Update	Only the Change is to be listed in the Update Column
OU			To be completed by OIS Account Administration
Last Name			Mandatory - Last Name of User being Registered
First Name			Mandatory - First Name of User being Registered
Account	b-		Completed by OIS Account Administration
Phone Number			Mandatory
Phone Number 2			Optional
Email Address			Mandatory
EVS Provider Number			Mandatory - Provider Number + Location Code (13 Digits)
User IP Address			Mandatory - (often www.whatismyip.com)
DHS moveitprogram			Mandatory - See Drop Down List
DHS moveitsubfolder			**Enter County Name** for which you are providing services. For a joined Counties please enter primary County
Connection: Active/Suspend			Select Value from Drop Down List: Active or Suspend
Environment			Select Value from Drop Down List: Production, Test, or Both
Type of Connection			Select Value from Drop Down List: Browser, FTP, SFTP, FTPS
Agency FEIN			Mandatory - Federal FEIN
Organization Name			Enter Entity Name which matches the FEIN
Organization DBAs			Enter Name(s) Entity is also doing business as (DBA)
Business Address			Address 1 Address 2 City, State, Zip
Reason for Change:			FIELD IS MANDATORY. New users CANNOT be registered with a change form. Change forms for Previous Users connection need to be SUSPENDED. Be sure to include all user attributes in the Current Information column

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SeGov Registration Change Form Request for New Managed Domain Account for Business Partner			
Criteria	**Current Information**	**Update**	**Instructions – Only the Change is to be Listed in the Update Column**
OU			To be completed by OIS Account Administration
Last Name	Maribel		Mandatory - Last Name of User being Registered
First Name	Torres		Mandatory - First Name of User being Registered
Account			Completed by OIS Account Administration **(Leave Blank)**
Phone Number	717-772-6873		Mandatory
Phone Number 2			Optional
Email Address	martorres@pa.gov		Mandatory
EVS Provider Number	(123456789) (0001)		Mandatory - Provider Number + Location Code (13 Digits)
User IP Address	123.45.678.98	659.32.123.59	Mandatory - (often www.whatismyip.com)
DHS moveitprogram	MATP		Mandatory - See Drop Down List

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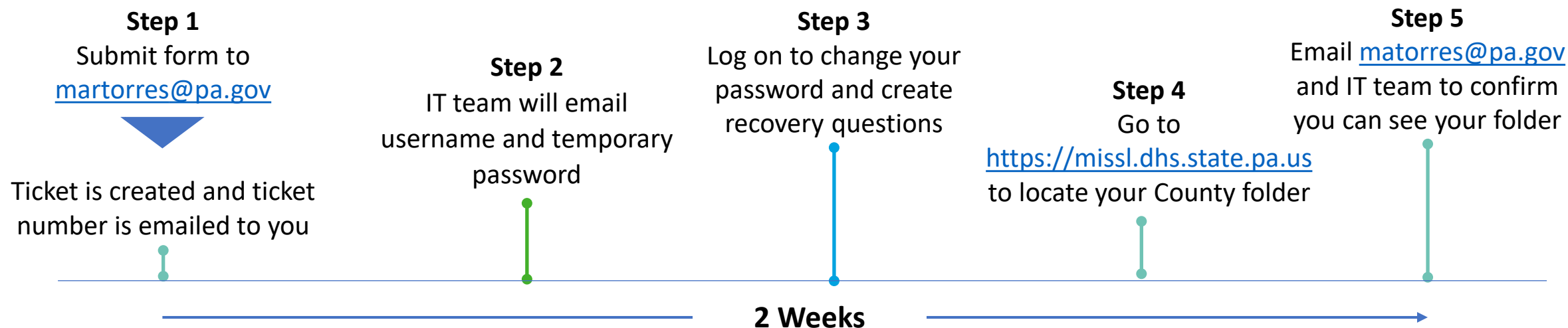DEPARTMENT OF HUMAN SERVICES

SeGov Registration Change Form
Request for New Managed Domain Account for Business Partner

Criteria	Current Information	Update	Instructions – Only the Change is to be Listed in the Update Column
DHS moveitsubfolder	MATP		Enter County Name for which you are providing services For a joined Counties please enter primary County
Connection: Active/Suspend	Active		Select Value from **Drop Down List: Active or Suspend**
Environment	Production		Select Value from **Drop Down List: Production, Test, or Both**
Type of Connection	Browser		Select Value from **Drop Down List: Browser, FTP, SFTP, FTPS (Let me know if you use Cloud service and which one?)**
Agency FEIN	22-123456		Mandatory - Federal FEIN
Organization Name	Greene County		Enter Entity Name which matches the FEIN
Organization DBAs			Enter Name(s) Entity is also doing business as (DBA)
Business Address	123 Locust Lane Greene, PA 17555	550 Smith Street Greene, PA 17555	Address 1 Address 2 City, State, Zip
Reason for Change:		Maribel Torres moved office location and has a new IP address	FIELD IS MANDATORY. New users CANNOT be registered with a change form. Change forms for Previous Users connection need to be SUSPENDED. Be sure to include all user attributes in the Current Information column

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Step 1
Submit form to
matorres@pa.gov

Ticket is created and ticket
number is emailed to you

Step 2
IT team will email
username and temporary
password

Step 3
Log on to change your
password and create
recovery questions

Step 4
Go to
https://missl.dhs.state.pa.us
to locate your County folder

Step 5
Email matorres@pa.gov
and IT team to confirm
you can see your folder

2 Weeks

SeGOV User Registration Form
Request for New Managed Domain Account for Business Partner

OU		To be completed by OIS Account Administration
Last Name		Mandatory - Last Name of User being Registered
First Name		Mandatory - First Name of User being Registered
Do you currently have an SeGov PA-DHS UserID?		Mandatory - Select Value from from Drop Down List
If Y - please provide ID(s):		Mandatory - If Y above
Account	b-	Completed by OIS Account Administration
Password		Completed by OIS Account Administration

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Password Management

- *Change password every 90 days*

- *Change password before it expires*

To **reset passwords**:

1. Go to **Keystone Login website**:

   https://www.hhsidm.state.pa.us/iam/im/businesspartners/ca12/index.jsp

   OR

   https://www.humanservices.state.pa.us/selfservice.html

2. Click on the **Forget Password** link

3. Hit continue; enter user id; answer hint questions, and change password.

Contact Person:

Maribel Torres

717-772-6873

martorres@pa.gov

You can participate in the poll by going to **PollEv.com/matpqacall** or by texting *matpqacall* to **22333** to respond.

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Administrative Processes:
April 2023 Survey Recap

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April Quarterly Administrators Call Feedback Survey Results

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20 individuals *representing* **21 counties** *responded to the survey – April 2023*

Call Follow Up

What are some topics that you would like to see addressed during the next call?

- Feedback on the new MCO referral process
- Cancellations and No Shows
- Enhance PROMISe system integration to identify consumers who live outside the county
- Mileage Reimbursement/Bus Pass Reporting System
- Provision of Out of County Transportation
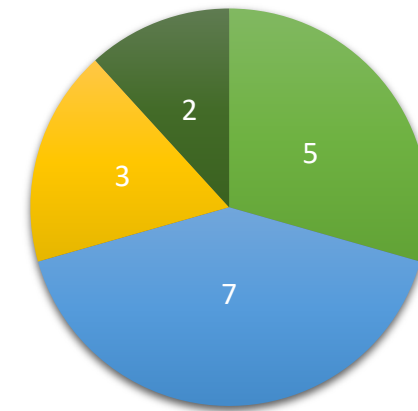- S&G revisions/Updates

Personnel Training

What is your biggest need from a training perspective?
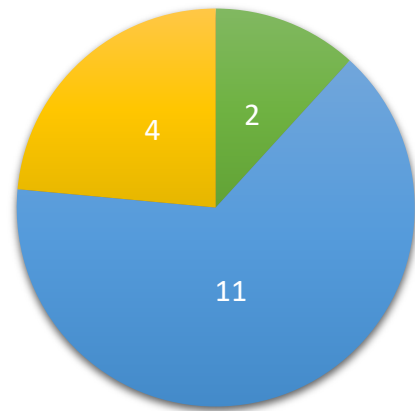
- ■ Resources to create training — 2
- ■ Resources to provide training — 11
- ■ Other — 4

If you had access to training resources, what kind of training would be beneficial to your program at this time?

- ■ Communication — 5
- ■ De-escalation Training — 7
- ■ Safety Training — 3
- ■ Other — 2

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Q&A

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Do you have any additional questions or comments about topics covered in today's session?

Please use the **Raise Hand** function to ask a question or share a concern

TEAMS GUIDE

Post Q&A

Raise Hand

Camera (on/off)

Mute (on/off)

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Thank You!

Email us with any suggestions or questions

- **Tammi Carter: tacarter@pa.gov**

- **Daphne Simeonoff: daphsimeon@pa.gov**

- **Amy Brandt: amybrandt@pa.gov**

Stay tuned for a feedback survey immediately following this call

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