



# CDPAP Billing and Reporting

## Setup and Process Guide

**Sandata**

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## CDPAP Billing and Reporting Setup

To comply with regulatory and reporting requirements from New York State Medicaid Billing, agencies performing administrative services for Consumer Directed Personal Assistance Program (CDPAP) on or after August 1<sup>st</sup>, 2024, for MCO and October 1<sup>st</sup>, 2023, for HRA, can be reimbursed for administrative costs Per Month Per Member (PMPM).

The PMPM reimbursement is based on members:

- Authorized hours for HRA per month.
- Serviced hours for MCO per month.

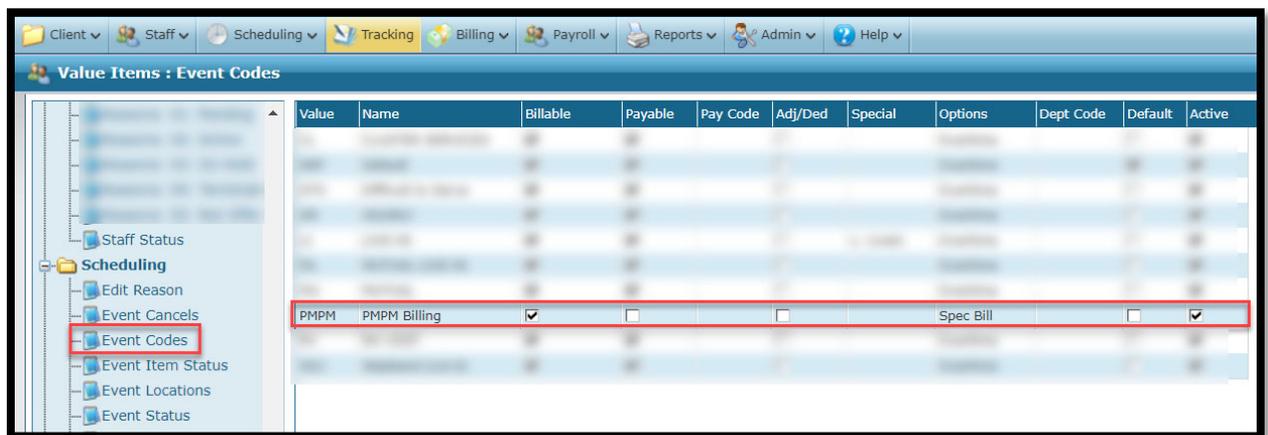
***Important Note:*** Please refer to your payer guidelines for billing this administrative rate as there may be different requirements such as rate codes, timely filing or billing process.

To enable this PMPM administrative service transactions follow the setup and invoice process as stated in this document.

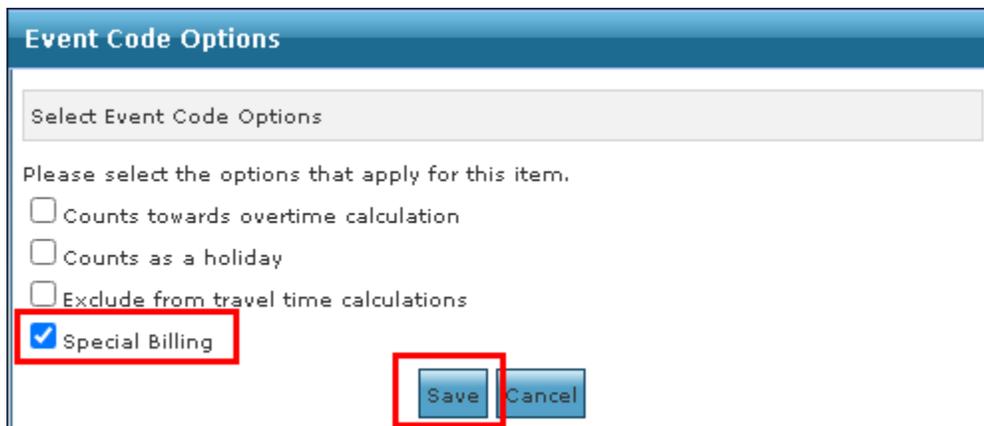
### Value Items Setup

**\*\*Note:** If this was completed for HRA, this step can be skipped.

1. Navigate to the **Value Items** screen.
1. Main Menu > **Admin** > **System Setup** > **Value Items**.
2. Click **Event Codes**.
3. Click **Add**.
4. Name the Event Code Value as “PMPM” & the Event Code Name as “PMPM Billing”
5. Select the **Billable** check box.
6. Click the **Options** box.



7. Select the **Special Billing** check box.
8. Click **Save**.



## Service Setup

**\*\*Note: If this was completed for HRA, this step can be skipped.**

1. Navigate to Service Screen  
Main Menu > **Admin** > **System Setup** > **Services**
2. Click **Add**.
3. Enter ID as PMPM and Name as CDPAP PMPM
4. Check **Suppress Authorization**
5. Default Bill Type: 05 – Unit
6. Click **Save**.

**Service Detail** Delete

**General**

ID: PMPM  
Name: CDPAP PMPM  
External Description: PMPM

This Service Is A Skilled Service  Do not send alerts for this Service  
 This Service Is A Therapy Service  Include in EVV Compliance reporting  
 This Service Is Active  
 Home Delivered Meals  
 Use Schedule Proposed Time For Advanced Visit Processing  
 Allow Scheduling From Authorizations  Allow Supplies  
 Lock Canceled Visits  
 Suppress Authorization  
 Wage Parity Eligible  
 Clinical Integration \*

Default Bill Type: 05-Unit  
Default Pay Type:   
Third Party Service:

**Agency Costs**

Base:  \$0.00  
Total:  \$0.00

## Payor Set Up

Note: For those agencies that are currently billing PMPM for HRA services, no changes in your HRA payor tables are required.

## Payor Set Up - MCO

Below is the tier breakdown by serviced hours per month.

Number of Direct Care Hours Authorized PMPM	Rate Code	FI PMPM Reimbursement Rate
Tier 1 (1-159 Hours)	2443	\$146.45
Tier 2 (160-479 Hours)	2444	\$387.84
Tier 3 (480 + Hours)	2445	\$1,046.36

The following steps should be completed for all MCO CDPAP payors:

- Navigate to a MCO Payor with CDPAP services.
  - Main Menu > **Billing** > **Payors** > **Payor**
- Click the appropriate **Plan** tab.
- Add the billing rate line for the service/event code.
  - Include a valid HCPCS code and a modifier if applicable for that payor.
- Set up the cap and rank by referring to your contract's requirements.
- Enter the applicable RevCode.
- Repeat steps 1-5 for the remaining MCO CDPAP Payors.

Service	Event	Shift	PSC	TSC	RevCode	HCPCS	Misc	Modifiers	Type	Week Rate	Weekend Modifiers	Weekend Rate	Contract Type	Contract Amount	Cap	Rank	Effective Date	Alt Service Code	Taxonomy Code
PMPM	PMPM	NS- No Shifts	32	01	0580	T1022	2443	UA	Unit	\$146.45		\$146.45	0- None	\$0.00	159	1	08/01/2024		
PMPM	PMPM	NS- No Shifts	32	01	0580	T1022	2444	UB	Unit	\$387.84		\$387.84	0- None	\$0.00	479	2	08/01/2024		
PMPM	PMPM	NS- No Shifts	32	01	0580	T1022	2445	UC	Unit	\$1046.36		\$1046.36	0- None	\$0.00	-	3	08/01/2024		

Sample Only - Please see your contracts

## Update CDPAP Clients

For each CDPAP client complete the following three steps:

1. Add a Service of “PMPM” to the CDPAP Client’s Admission
2. Review the client’s Existing PA/CDPAP Authorization
3. Add an Authorization of “PMPM” to the CDPAP Client

### Add a Service of “PMPM” to all CDPAP Client’s Admission

1. Navigate to the General section of the client’s admission.
  1. Main Menu > **Client** > **Search for and Open the Admission** > **General**.
2. Proceed to the ‘Services’ section and select the Green + Sign to add an additional service of PMPM as of:
  - A. Existing MCO service: 8/1/2024 for MCO
  - B. New Admission: Enter the begin date based of the Start of Care (SOC) for both MCO and HRA admissions.

The screenshot displays a software interface for managing client admissions. On the left is a navigation menu with categories like 'Client' and 'Chart', with 'General' highlighted. The main area is divided into three sections: 'Admission Ties And Dates', 'Managers/Etc.', and 'Services'. The 'Admission Ties And Dates' section contains fields for Company, Location, ROC, SOC, and EOC. The 'Managers/Etc.' section contains fields for Staff Manager, Clinical Manager, Coordinator, MRN #, Marketer, Team, and Admit Type. The 'Services' section features a table with columns for Code, Description, Began, Ended, and Case Seq #. Two rows are visible: 'PA Personal Assistant (CDPA)' with a begin date of 01/01/00, and 'PMPM CDPAP PMPM' with a begin date of 10/01/23. A green plus sign is visible in the top right corner of the Services table.

Code	Description	Began	Ended	Case Seq #
PA	Personal Assistant (CDPA)	01/01/00		
PMPM	CDPAP PMPM	10/01/23		

[Review Existing Client Authorizations](#)

On the General tab, check any existing authorization to ensure there are limitations (Authorizations Daily, Weekly or Monthly) entered.

*Note: For HRA only, without defined limitations, the system assumes that the client is authorized for services 24hrs a day, which causes them to receive the highest tier of reimbursement. For MCOs because the calculation is based on the confirmed service hours, the authorization limitation will not affect the tier value.*

The screenshot shows the 'Authorization' form with the following fields:

- General:**
  - Service: PA- Personal Assistant (C)
  - Event Code: HR-HOURLY
  - Ref. No.: 123456789
  - Format: Units
  - Maximum: 0 (0 = Unlimited)
  - Used: 1452.00
  - Modifier 1-4: Empty text boxes
  - Auth Diagnosis Code: Empty text box
  - Voided:
- Date Range:**
  - Begin: 06/01/2023
  - End: 05/31/2024
- Authorization Comment:** Empty text area
- Limitations (highlighted in red):**
  - Limit By: Day
  - Table of units per day:

Sat	Sun	Mon	Tue	Wed	Thu	Fri
32	32	24	24	24	24	24
  - Begin Ranges table:

Sat	Sun	Mon	Tue	Wed	Thu	Fri
00:00	00:00	00:00	00:00	00:00	00:00	00:00
23:59	23:59	23:59	23:59	23:59	23:59	23:59

Buttons: Save, Close

## Create a New Authorization for PMPM Billing

1. Navigate to the General section of the client's admission.
2. Double click on the payer.
3. Click the **Authorizations** tab.
4. Click **Add** (+).
5. Select the **Service** of **PMPM**
6. Select the **Event Code** of **PMPM**
7. Enter 'REMOVE' in the **Ref. No.** field.  
*If the payor's setting does not require an authorization number, leave this field blank.*
8. Select 'Units' in the **Format** drop down.
9. Enter **08/1/2024** in the begin date or the start date of the authorization (MCO).
10. Enter **12/31/2026** (or the preferred End Date)
11. Select 'Month' from the **Limit** drop down.
12. Enter **1** in the Total field.
13. Click **Save**.

**Authorization** [New Events] [Delete]

**General**

\* Service: PMPM- CDPAP PMPM  
Event Code: PMPM-PMPM BILLING  
Ref. No.: REMOVE  
Format: Units  
 Voided  
Maximum: 0 0 = Unlimited  
Used: 11.00

Modifier 1:   
Modifier 2:   
Modifier 3:   
Modifier 4:   
Auth Diagnosis Code:

**Date Range**

Begin: 08/01/2024  
End: 12/31/2026

**Authorization Comment**

**Limitations**

Limit By: Month Total: 1

[Save] [Close]

## Create a PMPM Staff Placeholder

If your agency is already setup for HRA CDPAP skip this step.

1. Using the Staff Search screen (Main Menu > **Staff**), create a new Staff as a Company by clicking on the plus **New Staff** button.
2. Select 'Company' from the Staff Type.
3. Enter "PMPM Placeholder" in the Name field then click on Next.

The screenshot shows the 'New Staff Wizard' window with the 'Name And Other Information' section. The 'Type' dropdown is set to 'Company' and the 'Name' field contains 'PMPM Placeholder'. Below this is the 'Other Information' section with fields for TIN and Home Phone. Navigation buttons at the bottom include 'Cancel', '< Previous', 'Next >', and 'Finish'.

4. Click on **Next** until you reach the position page, then select your PA position.
5. Click on **Next** then **Finish**.

The screenshot shows the 'New Staff Wizard' window at the 'Position' step. A list of job positions is displayed, with 'PA - Personal Assistant (CDPA)' highlighted by a red box. Navigation buttons at the bottom include 'Cancel', '< Previous', 'Next >', and 'Finish'.

6. Activate the PMPM Placeholder Staff, set the start date as 8/1/2024.

The screenshot shows the 'PMPM PLACEHOLDER' staff record page. The 'Agency Designations' section shows 'Position: Personal Assistant (CDP)'. The 'Managers / Etc.' section has checkboxes for 'Staff Manager', 'Clinical Manager', 'Clinical Integration', 'Marketer', and 'Contractor'. The 'Employment Status' section shows '02- Active' selected with a red box, and '01- New Employee' below it. The 'Hire Date' is set to 10/01/2023. A sidebar on the left shows navigation options like 'Staff', 'Overview', 'Personal', 'Contacts', 'Chart', 'General', 'Schedules', 'Availability', and 'Compliance'.

## Create a Schedule for the PMPM Monthly Transaction

1. Using the New Events screen (Main Menu > **Scheduling** > **New Events**), create a new schedule for the end of the month for each client being billed for the PMPM administrative fee. The schedule must recur monthly for the last day of each month, beginning August 2024.
2. Select the PMPM service.
3. Select Unit from the Bill Type
4. Select Hourly from the Pay type.
5. Enter 5:00 – 5:15 in the times fields.
6. Click on the Green Plus in the Event Code(s). Select the PMPM event code and remove the default event code.
7. Enter additional information such as the Client, and PMPM staff placeholder.



### Note:

*If the end of the month does not fall on the 30<sup>th</sup>, adjust the schedule date created to the last day of the month for billing consistency.*

Authz Ref No	Service	EC	Max	Remaining	Begin Date	End Date	Unit By	Max for Week
REMOVE	PMPM	PMPM-CDP 0	N/A	N/A	10/1/2023	12/31/2023	Month	N/A
	PA	L116-LIVE 0	N/A	N/A	4/1/2023	3/31/2024	Day	N/A

To add another month, follow the steps below.

8. Change date to the last day of the next month and select the green + **Add** button.

9. Once all schedules are created for the months you would like to build, press **Commit** on the top right of the 'New Events Screen' in order to create your monthly PMPM visit.

## Confirming the PMPM Visit

**\*\*Important:** Do not run before the middle of the following month for MCO contracts to ensure that all late time sheets are included in the tier calculation.

**Best Practice:** For MCO PMPM: monitor the PA visits in in the Billing Review screen by filtered for “Not OK to Bill,” remove the Confirm status, and “Show as Summary” for the previous month, and hit Refresh. Then sort by “Units” to identify clients where their tier may be affected by the client participant status, and you may want to wait to invoice the PMPM.

Client	Chart ID	Items	Has PRN Visit	Quantity	Units	Amt	Supplies	Payor	Auth No
	12			0.00	1,152	\$0.00	\$0.00	VNS Health Plan MLTC CI	
	25			0.00	997	\$0.00	\$0.00	HIR/Emblem Health CDPAP	
	31			0.00	990	\$0.00	\$0.00	HealthFirst PHSP CDPAP	
	14			504.00	504	\$3,356.64	\$0.00	Molina HealthCare Plan of	
	13			394.00	394	\$2,492.06	\$0.00	Senior Health Partners CC	
	5			164.00	164	\$1,038.12	\$0.00	VNS Health Plan MLTC CI	
	9			0.00	144	\$0.00	\$0.00	VillageCareMAX CDPAP	
	5			0.00	140	\$0.00	\$0.00	Molina HealthCare Plan of	
	3			138.00	138	\$759.00	\$0.00	VillageCareMAX CDPAP	

Items:	Type	Quantity	Status	Quantity	Amount	Type	Amount
163	Visits	0.00	Pending/Hold	55	\$3,356.64	Copy	\$0.00
	Hours	0.00	NOT OK To Bill	1,791.00	\$10,826.54	Supplies	\$0.00
	Units	4,343	Billed	0	\$0.00		
			Total Hours	1,229.75	\$14,183.18		
			Visits w/o	0			

1. Proceed to the Scheduling Overview Screen.
2. Filter by location if you have HRA vs MCO separated by location, if you do not, filter by payor.
3. Select Service PMPM and select the last day of the month.
4. Highlight any schedule in Results:
  1. Right Click
  2. Select All
  3. Right Click
  4. Mass Edit
  5. Status -> Confirmed.

## Creating an Invoice



**\*\*Best Practice:** Do not run before the middle of the following month for MCO contracts to ensure that all late time sheets are included in the tier calculation.  
PMPM Invoices should be created and exported on an alternate day from your standard billing date.

1. Navigate to the **Billing Review** screen.  
Main Menu > **Billing Review**
2. Use the created Event Code to search for visits being billed for CDPAP PMPM reimbursement.  
*Note: All invoices will display the tier one rate and amount until the invoice is created.*
3. Click **Update**.
4. Click **Create Invoices**.

The screenshot shows the 'Billing Review' interface. At the top, there are buttons for 'Clear Filter', 'Refresh', 'Create Invoices', 'Update', 'Print', and 'Close'. Below these are search filters for Admission, Company, Location, Admit Type, Team, Payor, Billing Freq, Rate Plan, Service, Type, Event, Status, Not OK To Bill Reason, Date From, Date To, Time Range, and Weekday. A calendar for November 2023 is visible on the right. Below the filters is a table with columns: Date, Client, ChartID, Service, EC, IN, OUT, TZ, Qty, Units, Rate, Flags, Amt, Copay, Supplies, Status, PRN, Override, Auth No, Auth Qty, Tasks, and Not OK to Bill Reason. A single row is visible for 09/30/2023.

5. Enter the invoice date.
6. Click **Create Invoices**

The screenshot shows the 'Create Invoices' dialog box. It has sections for 'General', 'Dates', 'Comments', and 'Printing'. The 'Dates' section has 'Invoice Date' set to 'Today (11/20/2023)' and 'Due On' set to '12/04/2023'. The 'Printing' section has two checkboxes: 'Print All Invoices Created' and 'Print A Summary Report'. A 'Create Invoices' button is highlighted at the bottom.

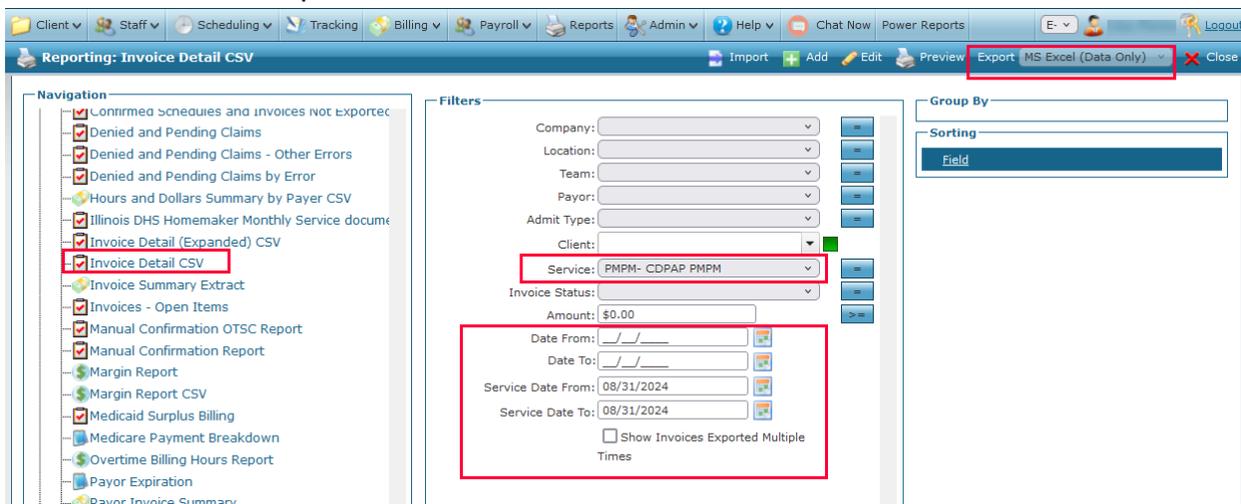
7. Navigate to the **Invoices** screen.  
Main Menu > **Billing** > **Invoices**
8. Double click, to open the invoice.
9. Review the invoice.

## Reviewing PMPM Invoices

Complete the following steps to review PMPM invoices.

Main Menu > Reports > Billing > Invoice Detail CSV

1. Select the PMPM Service
2. Clear the "Date From" & "Date To" by entering a zero in each field. These are the invoice dates.
3. Enter the last day of the month as the service dates.
4. Unselect Show Invoices Exported Multiple Times
5. Add additional filters as desired. From this screen you can filter by Location or payor.  
Note that the CSV file will also have these fields and can be filtered from the file.
6. Click on Export.



1.

### Sample PMPM Invoice Detail CSV:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z				
1	Comp	Company	Loc	Location Name	Payor Name	Chart ID	Client Name	Client Oth	Service Dst	Service D	Rev	Cod	HCPCS	Misc.	Event	Coc	Modifier	Time In	Time Out	Hours	Rate	Invoice Nt	Invoice Da	Date Expo	Total Amou	Invoice S	Amount	Pa	Balance
2	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	264	T1019	8400	PMPM				5:00AM	5:15AM	0.25	\$146.45	98545	9/14/2024	9/14/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
3	1	xxxxxx	3	MCO CDPAP	Health First CDPAP				8/31/2024	PMPM	580	T1022	2444	PMPM	UB			5:00AM	5:15AM	0.25	\$387.84	98544	9/14/2024	9/14/2024	\$387.84	Bill Sent	\$0.00	\$387.84	
4	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	264	T1019	8402	PMPM				5:00AM	5:15AM	0.25	\$1,046.36	98546	9/14/2024	9/14/2024	\$1,046.36	Bill Sent	\$0.00	\$1,046.36	
5	1	xxxxxx	3	MCO CDPAP	Aetna CDPAP				8/31/2024	PMPM	580	T1022	2443	PMPM	UA			5:00AM	5:15AM	0.25	\$146.45	98547	9/14/2024	9/14/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
6	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	264	T1019	8400	PMPM				5:00AM	5:15AM	0.25	\$146.45	98549	9/18/2024	9/18/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
7	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	264	T1019	8401	PMPM				5:00AM	5:15AM	0.25	\$387.84	98550	9/14/2024	9/14/2024	\$387.84	Bill Sent	\$0.00	\$387.84	
8	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	264	T1019	8400	PMPM				5:00AM	5:15AM	0.25	\$146.45	98551	9/18/2024	9/18/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
9	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	264	T1019	8400	PMPM				5:00AM	5:15AM	0.25	\$146.45	98548	9/14/2024	9/14/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
10	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	264	T1019	8400	PMPM				5:00AM	5:15AM	0.25	\$146.45	98552	9/14/2024	9/14/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
11	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	264	T1019	8401	PMPM				5:00AM	5:15AM	0.25	\$387.84	98554	9/14/2024	9/14/2024	\$387.84	Bill Sent	\$0.00	\$387.84	
12	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	580	T1019	8401	PMPM				5:00AM	5:15AM	0.25	\$387.84	98553	9/14/2024	9/14/2024	\$387.84	Bill Sent	\$0.00	\$387.84	
13	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	580	T1019	8400	PMPM				5:00AM	5:15AM	0.25	\$146.45	98555	9/14/2024	9/14/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
14	1	xxxxxx	3	HRA Medicaid CDPAP	HRA Medicaid CDPAP				8/31/2024	PMPM	580	T1019	8401	PMPM				5:00AM	5:15AM	0.25	\$387.84	98556	9/14/2024	9/14/2024	\$387.84	Bill Sent	\$0.00	\$387.84	
15	1	xxxxxx	2	MCO CDPAP	Aetna CDPAP				8/31/2024	PMPM	580	T1022	2443	PMPM	UA			5:00AM	5:15AM	0.25	\$146.45	98557	9/18/2024	9/18/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
16	1	xxxxxx	2	MCO CDPAP	Aetna CDPAP				8/31/2024	PMPM	580	T1022	2443	PMPM	UA			5:00AM	5:15AM	0.25	\$146.45	98558	9/18/2024	9/18/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
17	1	xxxxxx	2	MCO CDPAP	Aetna CDPAP				8/31/2024	PMPM	580	T1022	2444	PMPM	UB			5:00AM	5:15AM	0.25	\$146.45	98559	9/14/2024	9/14/2024	\$146.45	Bill Sent	\$0.00	\$146.45	
18	1	xxxxxx	2	MCO CDPAP	Aetna CDPAP				8/31/2024	PMPM	580	T1022	2444	PMPM	UB			5:00AM	5:15AM	0.25	\$387.84	98560	9/14/2024	9/14/2024	\$387.84	Bill Sent	\$0.00	\$387.84	
19	1	xxxxxx	2	MCO CDPAP	Aetna CDPAP				8/31/2024	PMPM	580	T1022	2444	PMPM	UB			5:00AM	5:15AM	0.25	\$387.84	98561	9/14/2024	9/14/2024	\$387.84	Bill Sent	\$0.00	\$387.84	
20	1	xxxxxx	2	MCO CDPAP	Aetna CDPAP				8/31/2024	PMPM	580	T1022	2444	PMPM	UB			5:00AM	5:15AM	0.25	\$387.84	98562	9/14/2024	9/14/2024	\$387.84	Bill Sent	\$0.00	\$387.84	
21	1	xxxxxx	2	MCO CDPAP	Health First CDPAP				8/31/2024	PMPM	580	T1022	2445	PMPM	UC			5:00AM	5:15AM	0.25	\$1,046.36	98563	9/14/2024	9/14/2024	\$1,046.36	Bill Sent	\$0.00	\$1,046.36	

## Exporting the Invoice

1. Navigate to the **Exports** screen.  
Main Menu > **Billing** > **Exports**
2. Select a CDPAP payor.
3. Click **Export**.

The screenshot shows the 'Billing Export' application window. The top right corner contains buttons for 'Clear Filter', 'Refresh', 'Export' (highlighted with a red box), 'Print', and 'Close'. The search filters section on the left is highlighted with a red box and includes fields for Client, Company, Location, Admit Type, Team, Region, Payor, Status, Format, Provider ID, and FileName (EXP20210430032SUFFOLKCDP). The Date From and Date To fields are also visible. A calendar widget for April 2021 is shown on the right. Below the filters is a table with the following data:

Date	Client	Chart ID	Invoice	Items	Amount	Balance	Status	Comments	As Of
04/30/21			0000018258	2	\$444.72	\$444.72	05- Billable		04/30/21