



Quarter 1 SMAA/RMTS Coordinator Regional Meeting

Region 9 LEC
Administrative Unit

Introductions

Tell us your name, district you represent, and select a word that defines how you are feeling about FY 2026-27:

- Confident
- Excited
- Ready
- Curious
- Overwhelmed
- Optimistic
- Hopeful
- Nervous



Helping Coordinators Be Successful in FY 2026/27



Meeting Objectives

Throughout today's meeting, we're going to:

- Review the Medi-Cal Programs and your role.
- Break down the newest DHCS guidance into practical, easy-to-understand information.
- Simplify complex processes so they're easier to manage throughout the year.
- Reflect on and share best practices and lessons learned from the first quarter and from coordinators across Region 9.
- Discuss common challenges and practical solutions to help you avoid potential pitfalls.
- Provide resources and tools you can take back and implement right away.
- Build your confidence so that when questions arise, you'll know the answers and feel prepared to make informed decisions.
- Finally outline full-service, discuss fiscal data request and annual deadlines.

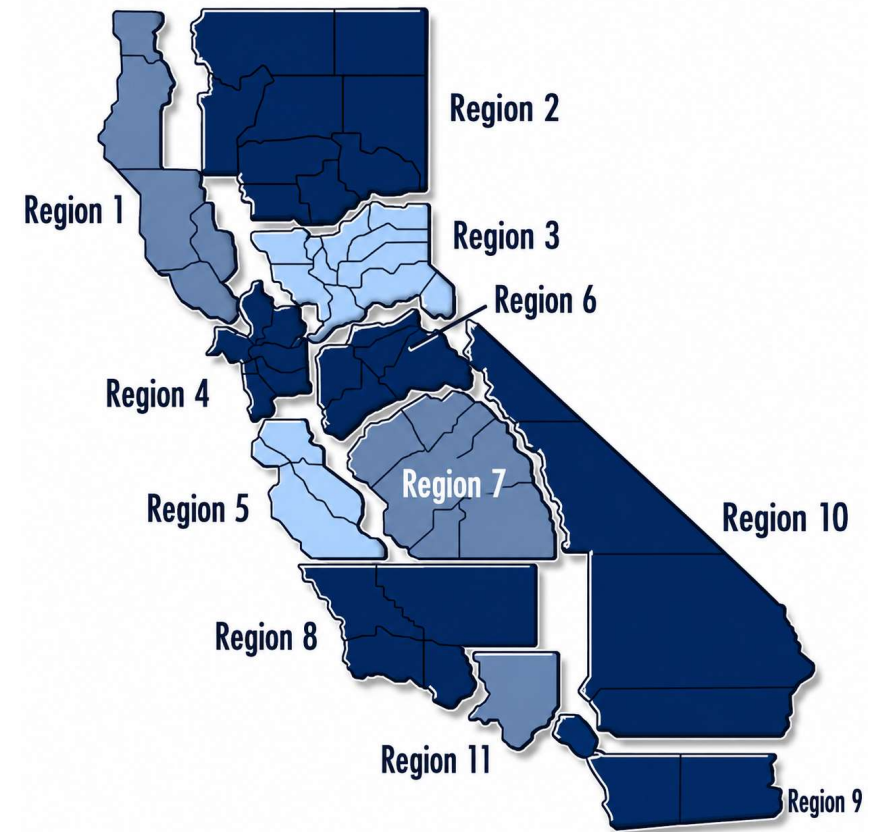
School-Based Medi-Cal Programs

- Local Educational Agency Medi-Cal Billing Option Program (LEA BOP):
- A federally funded program that reimburses Local Educational Agencies (LEAs) for delivering **direct health services** – such as speech therapy, occupational therapy, nursing, and psychological services – to Medi-Cal eligible students based on a fee-for-service model.
- School-Based Medi-Cal Administrative Activities (SMAA)
- A federally funded program that reimburses LEAs for performing **administrative and outreach activities** – such as providing Medi-Cal outreach, coordinating health-related referrals, arranging for translation and/or non-emergency transportation, and program planning – necessary for the proper and efficient administration of the Medi-Cal program.



Understanding California's RMTS Administrative Units/LECs

Since 1999, school agencies throughout Orange, San Diego, and Imperial counties have partnered with the Orange County Department of Education to participate in the SMAA Program through the Region 9 RMTS Administrative Unit—formerly known as Region 9 LEC.



CALIFORNIA SOCAL CONSORTIUM

Agency/program type	Region 8	Region 9	Combined
School districts	62	62	124
Charter schools/programs	4	14	18
County-operated programs	11	5	16
SELPAs	3	5	8
Community colleges	2	0	2
Total listed agencies/program units	82	86	168



168 Agencies participating
across seven Southern
California counties



18, 154 Total TSP
6,324 in Region 8
11,830 in Region 9



What This Means to You

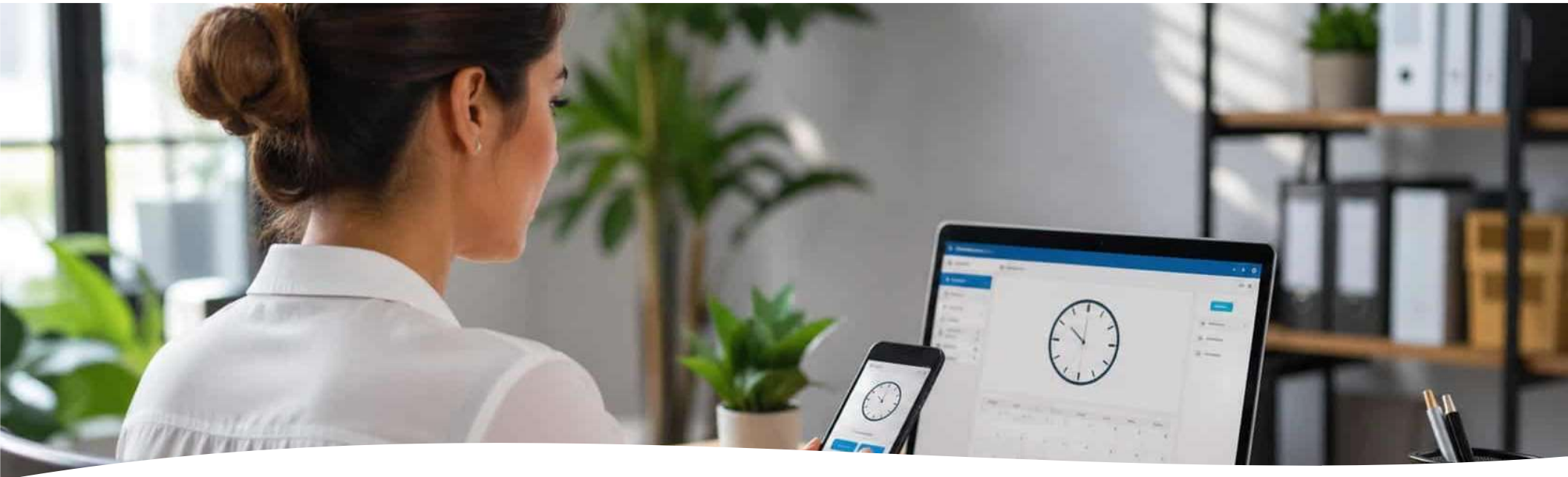
Your LEA is part of one shared regional time study. Every accurate TSP List, properly assigned calendar and shift, completed moment, and timely clarifying-question response contributes to the reliability and success of the entire consortium.

Your participation protects your LEA and strengthens the results for everyone.

Random Moment Time Survey

RMTS





What is Random Moment Time Survey (RMTS)?

Random Moment Time Survey (RMTS) is a federally approved, web-based time study mechanism used in California to determine the portion of an employee's workday spent performing activities that are reimbursable by Medi-Cal.

Participation in RMTS is required for LEAs seeking reimbursement through the LEA BOP or SMAA programs – unless all direct health service practitioners are contracted out and no employees participate in SMAA.

When Does RMTS Take Place?

RMTS occurs throughout each fiscal quarter

 Random moments are generated continuously and occur only within each participant's assigned paid working schedule.

Quarter	Quarterly Sampling Period
Q1	July 1 – September 30
Q2	October 1 – December 31
Q3	January 1 – March 31
Q4	April 1 – June 30

TSIP CLARIFICATION:

The actual time study period begins when the first participating LEA is in session and continues through the last day any participating LEA is in session during the quarter.

The Sample Universe includes all potential paid working minutes that may be randomly selected for an RMTS moment.

How is an RMTS Moment Established?

Certified Participant information determines which paid working minutes are available for random selection.



TSPs

Certified TSP Universe

Participating employees are identified and certified before each quarter.



Paid Working Time

Each TSP is assigned a calendar, working days, and paid working shift.



All eligible minutes

Sample Universe

All potential paid working minutes become eligible for selection.



Random RMTS Moment

The system randomly selects one participant, date, and exact minute.

Certified TSPs + paid working time > random RMTS moment

One participant. One randomly selected paid working minute. One RMTS moment



Why is RMTS Important?

RMTS results are used to allocate costs for school-based reimbursement programs

- **SMAA** program (School-Based Medi-Cal Administrative Activities)
- **LEA BOP** (Local Educational Agency Billing Option Program)

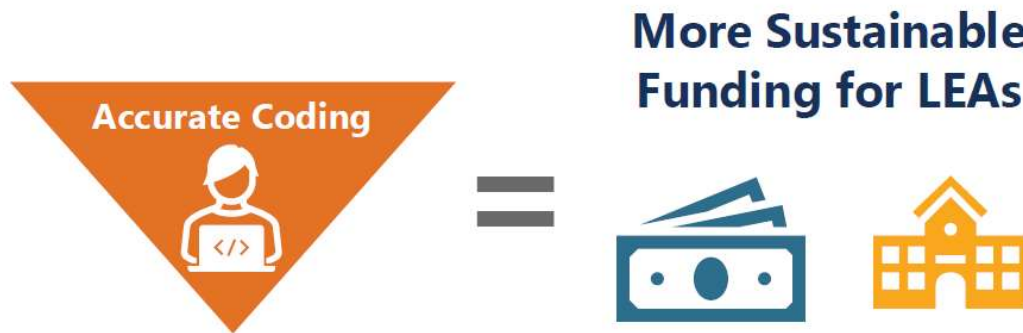
Each LEA's participation impacts other LEAs within the region and the entire consortium.

To remain eligible for both programs, LEAs must maintain a **minimum response rate of 85%**.



Impact of Coding – LEA BOP

- » Higher Direct Medical Services Percentage (DMSP) = higher portion of costs a LEA may receive.
- **Example:** An LEA in a RMTS AU had a **47.35% DMSP** and was owed **\$13,180,852** in reimbursements. If the RMTS AU had a **53.54% DMSP**, the LEA would be owed **\$14,761,808** for costs of providing the exact same services.
- Coding has a direct relationship to reimbursement.



Source: DHCS 2026 RMTS Coder Training. Example shown for educational purposes; actual reimbursement depends on each LEA's eligible costs and applicable claiming requirements.



TSP Training Requirements

[Understanding Random Moment Time Survey \(RMTS\): A Training for Time Study Participants \(TSPs\).](#)



Random Moment Time Study (RMTS):
Time Study Participant (TSP) Training

e-mail notification and accessing rmts moments

If a TSP is selected for a moment, they will receive an email notification one day in advance, followed by a reminder one hour before the scheduled moment. It's essential that the TSP responds to every assigned moment, regardless of whether they are engaged in Medi-Cal-related activities at that time.

Emails will come from calec@pcgus.com
Be sure to check your inbox and spam folder.

The email notification will include a direct link to the secure RMTS website – no login credentials are required.

TSPs simply click the link to access and respond to their moment.





Important reminders:



TSPs should keep their time study notification emails until they've completed and submitted their moment. If an email is **accidentally deleted**, the LEA SMAA Coordinator can resend it.



TSPs must complete their RMTS moment within **3 days**. It is their responsibility to respond promptly and provide detailed, accurate information.



Once submitted, the response is certified and locked – it cannot be edited or re-opened.



If a moment is not completed, the system will send automated email reminders

(Late notices) at 22, 46, and 62 hours after the due date.



The LEA SMAA Coordinator(s) will be copied on the late notices **24, 48 and 64 hours** after the due date.



What does a random moment look like?



Claiming System

LEA: Corona-Norco Unified School District; **Name:** Employee, Test 21013; **Email:** test21013@test.com; **Moment:** 7/1/2026 at 8:21 AM



Were you working at the time of your moment?

- ☐ Yes, I was working
- ☐ No, I was on paid time off
- ☐ No, I was on unpaid time off
- ☐ No, moment is before/after work day
- ☐ No, I was on a break
- ☐ No, I was on a paid lunch
- ☐ No, I was on an unpaid lunch

← Previous

Next →



The TSP will be asked to respond to a question: ***“Were you working at the time of your moment?”***



What does a random moment look like?



All TSPs will then be asked the 3 (three) RMTS sample questions:

1

Who were you working with during the sample moment?



TSPs should identify the person by role (e.g., a student, colleague, parent, etc.), not name.

2

Describe in detail the activity you were performing during your sampled moment.



TSPs should **describe the specific activity** and its primary focus.

3

Describe in detail why you were doing this activity during your sampled moment.



TSPs should explain the specific **purpose of the activity**.



A complete response should:

- ✓ Describe only the activity occurring at the exact minute.
- ✓ Include enough detail for the activity to be understood
- ✓ Avoid vague responses such as “Doing my job”
- ✓ Exclude names, initials, identification numbers, acronyms, and other personally identifiable information.





What does a random moment look like?



If the TSP is listed in Participant Pool #1-Direct Service Providers, then a fourth sample question will be asked:
“Is the activity in your response (including pre- and post-service time) being performed as part of the student’s plan of care?”

- ✓ Yes, the student’s IEP/IFSP
- ✓ Yes, the student’s other type of care plan, such as a 504 Plan, a student health plan, or a nursing plan
- ✓ Yes, the student’s behavioral health plan
- ✓ Yes, the student’s vision/hearing screening or assessment
- ✓ Yes, the student’s physical, mental, or behavioral health screening or assessment
- ✓ Yes, required immunization, or other covered EPSDT (Early and Periodic Screening, Diagnostic, and Treatment) service
- ✓ No, the activity was not applicable to any of the above

What does a random moment look like?

Claiming System

LEA: Unified School District **Name:** **Email:** **Moment:** 5/27/2015 at 9:06 AM

1. Who were you with?
I was by myself in my office

2. What were you doing?
Talking to a parent on the phone

3. Why were you performing this activity?
Parent had called and wanted to talk about student's progress on Speech Therapy goals

☐ By submitting this information, I hereby attest that I have read the materials on this site and certify that I understand the purpose of the Medi-Cal Administrative Activities (MAA) program, my role in the program, and how to accurately complete the Random Moment Time Survey.

[Submit Moment](#) [Edit](#)

By checking the box below their response, the TSP is confirming that they did indeed read the training slides and certify that they do understand the purpose of the SMAA Program, their role as a TSP and how to accurately complete the RMTS survey.

What does a random moment look like?

Claiming System

✓ You've successfully completed this moment!

- The TSP will receive a confirmation screen that the RMTS moment was submitted successfully.
- Responses will not be recorded in the RMTS system until the TSP receives this green check box. The system does not auto-save partial responses.

Clarifying Question/Request for Follow-up



If insufficient or conflicting information is provided by the TSP in their moment response, the RMTS AU may ask up to 2 (two) Clarifying Questions (CQs) per moment may be sent to the TSP.

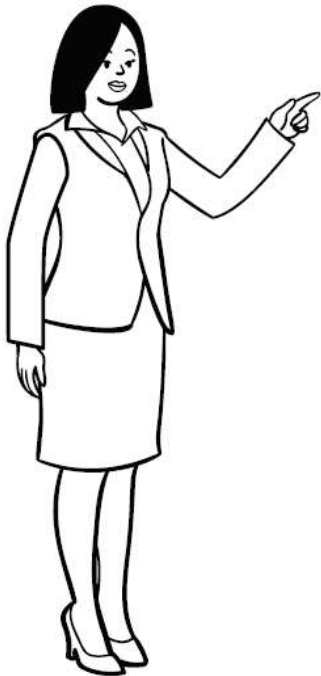


TSPs have **5 student attendance days** to respond to each Clarifying Question.



If a Clarifying Question remains unanswered, the RMTS system will automatically send reminders at **24 and 48 hours**. SMAA Coordinators and other identified RMTS system users will be copied on follow-up reminders at **72 and 96 hours**.

Decoding Moments Using the P.O.I.N.T Framework



P

Primary Focus

What was the primary topic or focus of the TSP's activity?

O

Objective

Why was the TSP completing the activity?

I

Insight

What insight was provided for the activity that the TSP was performing?

N

Necessary Detail

Is there any additional detail you can extract from a clarifying question?

T

Timely

If clarifying questions are required, be sure to ask them in a timely manner (up to two CQs per moment response are allowed within 15 working days from the date the TSP completed their initial moment response).

Clarifying Question/Request for Follow-up

Credentialed School Psychologist	
Pre-Question:	<i>Not sure</i>
Who were you with?	<i>Myself</i>
What were you doing?	<i>Preparing for an IEP meeting -- printing out the report, updating SEIS, etc.</i>
Why were you doing this?	<i>To prepare for an IEP meeting</i>

Final Code: 2Z

Potential Code: 2A, if the CQ response supports that code.

Potential CQ: *You have listed several tasks in your response. Can you describe the specific activity you were performing during this moment?*

Potential Response: *I was updating their goals in SEIS.*

The Full-Service Partnership: Dividing the Work

CA SoCAL, Region 8 & 9 RMTS Administrative Units (RMTS AU)

Administers RMTS and SMAA Claiming

- Administer the RMTS system and quarterly sampling process
- Code RMTS moments and manage clarifying questions
- Prepare and submit SMAA reimbursement invoices
- Monitor compliance and provide regional reporting
- Provide technical assistance and coordinate with DHCS

RMTS COORDINATOR

Local Knowledge and Follow-Through

- Maintain accurate participant, calendar, and shift information
- Ensure TSPs complete the required DHCS training
- Monitor moment responses and follow up with participants
- Submit timely fiscal data and retain required documentation
- Review required reports and communicate changes or concerns



Your Role as the RMTS Coordinator

1 | Coordinate

- Serve as your LEA's primary RMTS contact
- Participate in Region 9 meetings and trainings

2 | Maintain Your TSP List

- Keep participant information current and accurate
- Update required information, including funding source
- Review and certify the TSP List each quarter

3 | Monitor Participation

- Monitor moments throughout the quarter
- Follow up on outstanding responses
- Maintain the required **85% response rate**

4 | Maintain Documentation

- Keep required RMTS records complete and audit-ready

5 | Review & Certify Coding

- Complete the quarterly **LEA Coding Review**
- Review applicable moments and certify the review

Where Can a Third-Party Vendor Help? A vendor may:

- Assist with TSP List updates, particularly Direct Health Care Providers/Pool 1
- Support the LEA during Coding Review for 2A and 2Z moments

Important: Vendors **may not have direct access to the RMTS system. The LEA Coordinator remains responsible for the process.**

RMTS Coordinator's Roadmap: August – October 2026



August 2026

September 2026

October 2026

1

Prepare for Q2

Finalize Staff Pool List
and align district paid-
day calendars.

August 2026

FY 2026/27 Q1 Mandatory Regional Meetings

August 4, 2026

Open FY 2026/27, Q2 RMTS System

August 12, 2026

FY 2025/26, Q4 Coding reports Out to District
(30 days review)

August 28, 2026

FY 2026/27, Q2 Submit Calendar and
Staff Pool List

August 2026

FY 2024/25 Q4 SMAA Invoices out for Signatures

2

Review Coding Reports

Review FY 2025/26 Q4
Coding Reports

September 1, 2026

Request Fiscal Data for FY 2025/26
Q1-4

September 4, 2026

FY 2026/27, Q2 Certify Calendars and
Staff Pool List

September 12, 2026

FY 2025/26, Q4 Coding Reports
Certification

September 18, 2026

Fiscal Data for FY 2025/26 Q1-4 Due

September 28, 2026

FY 2026/27, Q2 Moments will be
generated

3

Maintain RMTS Participation.

October 2026

FY 2026/27, Q2 Regional Meetings

October 26, 2026

FY 2026/27 Q3 RMTS System Opens

Build and Maintain Your TSP list



A successful RMTS quarter starts with the right people on the list.

WHO – Who should Participate?

- Staff who provide direct medical services and/or SMAA related Activities

FUNDING – Are they eligible?

- Regularly perform direct medical services and/or SMAA-related activities
- Not 100% federally funded
- Not fully funded through indirect costs

MAINTAIN – What changes each quarter?

- Add/remove participants (Termination, Job-position changes)
- Keep participant information accurate

CERTIFY – Staff Pool list and Calendars

- Review the TSP list, confirm information is correct (shifts and calendars)

Staff pool list

Staff Pool List

The TSP list organizes participants by job category into two pools:

- Pool 1: **Direct health service practitioners** eligible to bill under the LEA Billing Options Program (LEA BOP)
- Pool 2: **Administrative claiming staff** and **health practitioners not billing for direct medical services** (SMAA)





Pool 1 - Direct Service Providers

Description:

Pool 1 is comprised of direct service staff who provide direct health services and may also perform administrative tasks necessary to support the Medi-Cal programs.

Eligibility Criteria:

- Must be an eligible practitioner under the LEA Billing Options Program (LEA BOP)
- Primary job function is providing direct medical services to students
- Submit claims for reimbursement for their direct services through the LEA BOP
- Job category placement is based on how the staff member bills under the LEA BOP
- If an LEA is not billing through the LEA BOP, it should not have any Pool 1 participants



Pool 1 - Direct Service Providers

The following employees/TSPs should be **excluded** from Pool 1:

- Contracted direct health service practitioners
- Providers who are not eligible to bill for direct medical services under LEA BOP
- Qualified practitioners that the LEA does not intend to bill for in the upcoming quarter
- Practitioners who are 100% federally funded (SACS Resource Codes 3000–5999) or fully funded by the district's indirect cost rate (SACS Function Codes 7120, 7190, 7200–7600, 7700, 8100–8400, 8700)

Please note Job Category #32 (“Other positions approved by CMS for LEA BOP”)

- No TSPs should be assigned to this category
- DHCS will require LEAs to reclassify based on license/credential and billing eligibility



Pool 1 Job Categories

- Associate Marriage and Family Therapist
- Associate Professional Clinical Counselor
- Certified Nurse Practitioner
- Certified Public Health Nurse
- Certified Wellness Coach
- Community Health Worker
- Credentialed Audiologist
- Credentialed School Counselor
- Credentialed School Psychologist
- Credentialed School Social Worker
- Credentialed Speech-Language Pathologist
- Licensed Audiologist
- Licensed Clinical Social Worker
- Licensed Educational Psychologist
- Licensed Marriage and Family Therapist
- Licensed Occupational Therapist
- Licensed Optometrist
- Licensed Physician
- Licensed Professional Clinical Counselor
- Licensed Psychiatrist
- Licensed Physical Therapist
- Licensed Physician Assistant
- Licensed Psychologist
- Licensed Registered Nurse
- Licensed Respiratory Care Practitioner



Pool 1 Job Categories

- Licensed Speech-Language Pathologist
- Licensed Vocational Nurse
- Occupational Therapy Assistant
- Orientation and Mobility Specialist
- Physical Therapist Assistant
- Program Specialist (limited to LEA BOP TCM services only)
- Registered Associate Clinical Social Worker
- Registered Credentialed School Nurse
- Registered Dietician
- Registered School Audiometrist
- Speech-Language Pathology Assistant
- Trained Health Care Aide
- Other: Any job category that is added in a future California State Plan as a qualified rendering practitioner will be included in the above list.

Note: If a practitioner's job title is not listed in the above practitioner job categories, DHCS requires the submission of a TSP Equivalency Request Form.



Pool 2 - Administrative Service Providers

- **Description:**

Pool 2 includes staff who **regularly perform Medi-Cal administrative activities** as part of their job, as well as direct health care providers who are not eligible to submit claims through the LEA Billing Option Program (LEA BOP). These individuals do not direct health services but support the Medi-Cal program through administrative claiming.

Pool 2 Criteria

Staff included routinely perform one or more of the following Medi-Cal Administrative Activities:

- Code 4. Medi-Cal Outreach
- Code 6. Facilitating the Medi-Cal Application
- Code 8. Referral, Coordination, and Monitoring of Medi-Cal Services
- Code 10. Arranging Transportation in Support of Medi-Cal Services
- Code 12. Translation Related to Medi-Cal Services
- Code 14. Program, Planning, Policy Development, and Interagency Coordination Related to Medi-Cal Services
- Code 15. Medi-Cal Claims Administration, Coordination, and Training



Pool 2 Administrative Service Providers

The following employees/TSPs should be **excluded** from Pool 2:

- Staff who **only** perform Code 16 (General Administrative Activities) are not eligible for SMAA
- TSPs who are 100% federally funded or fully funded by the district's indirect cost rate
- LEAs not claiming SMAA, should not include any Pool 2 participants.



Pool 2 Job Categories

- Certified Wellness Coach
- Community Health Worker
- Community Liaison
- Coordinator – various selected positions (Medicaid, Behavioral Health, Speech, Nursing, etc.)
- Direct Service Practitioner (Pool 1) that is not qualified to be billed under the LEA BOP (i.e., a Speech Language Pathologist Assistant without supervision)
- Direct Service Practitioner (Pool 1) that is not providing direct billable health services
- Director/Administrator – various selected positions (i.e., Behavioral Health, Speech, Nursing, etc.)
- Education/Instructional Aide
- Family Resource Center Staff (i.e., manager, secretary, office manager, clerk, assistant, director, coordinator, etc.)
- Health Care Assistant/Advocate
- » Health Center Staff (i.e., manager, secretary, office manager, clerk, assistant, director, coordinator, etc.)
- Health Services Special Education Teacher
- Health Technician/Specialist
- Interpreters & Interpreters Assistant
- Instructor, Orientation and Mobility (visually handicapped)
- Medical Administrative Coordinator/Assistant
- Medical Assistant
- Medical Intern
- Office Clerical Staff (i.e., technician, secretary, office manager, clerk, assistant, etc.)



Pool 2 Job Categories

- Organization Facilitator
- Parent Community Facilitator/Liaison
- Placement Assistant
- Principal and/or Assistant Principal
- Professional Expert
- Pupil Support Services Administrator
- Pupil Support – Technician
- School Bilingual Assistant
- Secretary, Senior Secretary
- Sign Language Interpreter
- Special Education Administrator
- Special Education Support Technician/Assistant
- Student Support Services Coordinator/Case Manager
- Teacher – various selected positions (Special Education, Alternative Education,
- Resource, Special Day Care Class)
- Translator, Senior Translator
- Transportation Planner/Router

Note: If a TSP's job title is not listed in the above practitioner job categories, DHCS requires the submission of a TSP Equivalency Request Form.



Equivalency Request Forms

Equivalency Request Process



LEC RMTS Coordinators must submit a TSP Equivalency Request to DHCS for an exception to the list of approved TSP job classifications on behalf of a participating LEA.



All Equivalency Requests must be approved by DHCS **before** the quarter's sample is generated.



Equivalency Requests must be submitted for LEA job classifications or individual staff that perform duties that are substantially similar to the DHCS-approved TSP job classifications but have different job titles.



All Equivalency Requests must be made **prior** to the start of a quarter using the TSP Equivalency Request Form, found on the DHCS website.



The due dates for TSP Equivalency Requests will be specific to the RMTS Administrative Unit and determined by DHCS prior to the start of each FY.



Once the TSP Equivalency Request Form is approved, the TSP may be included in the Unit's TSP Universe.



State of California—Health and Human Services Agency
Department of Health Care Services



GOVERNOR

**Participant Pool 1 Time Survey Participant (TSP)
Equivalency Request Form**

LEA/LEC: _____ Submitted Date: _____

LEA Name: _____ Fiscal Year and Quarter: _____

RMTS Provider Identifier (NPI) Number: _____ ODS Code: _____

Approved Job Classification Title: _____

Proposed Equivalent Job Classification Title: _____

Request:

☐ Individual TSP ☐ Specific job classification (list number of TSPs that will participate): _____

Pursuant to the California school-based Random Moment Time Survey Manual, each LEA/LEC must ensure LEA staff performing school-based Medi-Cal activities are included in the authorized Time Survey Participant (TSP) universe based on the Job Titles as listed on the approved job classification list and description on the Job Classification Titles with the authorized cost pools within the Medi-Cal Administrative Activities (SMAA) or Local Educational Agencies (LEA) Program qualifications as per the website at: [RMTS ProgramQualifications - DHCS \(ca.gov\)](https://dhcs.ca.gov/ProgramQualifications)

1. Is the primary job function of the proposed equivalent classification to provide:

- ☐ eligible SMAA or LEA cost pool activities?
- ☐ This job classification routinely (daily) provides instructional services
- ☐ This job classification routinely (daily) provides educational services
- ☐ This job classification routinely (daily) provides both instructional and educational services
- ☐ This job classification routinely (daily) provides both instructional and medical services

2. Does the LEA intend to bill for services provided by the proposed equivalent classification when services are received as specified under LEA procedures?

- ☐ Yes, we do intend to bill Medi-Cal Administrative to LEA Program
- ☐ No, we do not intend to bill for the job classification's services

3. Do all practitioners in the proposed equivalent classification meet the practitioner qualification requirements defined in the RMTS Worksheet?

- ☐ Yes, all practitioners in the job classification meet the LEA Program qualifications
- ☐ No, all practitioners in the job classification do not meet the LEA Program qualifications for services

DHCS Form 7023UK
Page 1

Agency: Department of Health Care Services

Administrative Activities (SMAA)
Survey Participant (TSP)
Request Form

Submitted Date: _____

Fiscal Year and Quarter: _____

Medi-Cal Administrative Activities: _____

Administrative Activities (SMAA) Manual, each LEA/LEC must ensure LEA staff performing school-based Medi-Cal activities are included in the authorized Time Survey Participant (TSP) universe based on the Job Titles as listed on the approved job classification list and description on the Job Classification Titles with the authorized cost pools within the Medi-Cal Administrative Activities (SMAA) or Local Educational Agencies (LEA) Program qualifications as per the website at: [RMTS ProgramQualifications - DHCS \(ca.gov\)](https://dhcs.ca.gov/ProgramQualifications)

Intend to bill for services provided by the proposed equivalent classification when services are received as specified under LEA procedures?

Do all practitioners in the proposed equivalent classification meet the practitioner qualification requirements defined in the RMTS Worksheet?

DHCS 4023 B (Revised 04/2022)

Page 1 of 2



Key Takeaway:

Submit early, follow the process, and get approval **before** the quarter begins to ensure the TSP can be included in the Unit's TSP Universe.



Funding Source Compliance Certification

Verify funding. Meet requirements. Support compliance.



After updating the TSP List, each LEA **must** submit a certification of participant funding to their RMTS AU (LEC). This verifies that all participants' salary and benefit costs meet the requirements for Certified Public Expenditures (CPEs), as required by DHCS.



THIS FORM MUST BE:

- ✓ Printed on the LEA's letterhead
- ✓ Signed by the LEA's business/fiscal officer



The Region 9 RMTS AU (LEC) office **cannot** certify the Region's Staff Pool List (SPL) until Attachment A has been received from all participating LEAs.



TIP:

Submit your certification as soon as possible to avoid delays in certifying the Region's Staff Pool List (SPL).

State of California – Health and Human Services Agency
Department of Health Care Services

PDL # 22-004

Attachment A: Certification of Certified Public Expenditure Funding Source
School-Based Medi-Cal Administrative Activities (SMAA) Program
Random Moment Time Survey (RMTS)

Certification of Certified Public Expenditure Funding Source for Fiscal Year 2021-22

I, the undersigned, state the following:

As a public administrator, a public officer, or other public individual duly authorized as having authority to sign on behalf of _____ (Public Agency), I am authorized or designated to make this certification, and declare that this Certification is true and correct.

I understand that the making of false statements or the filing of a false or fraudulent claim is punishable under state and federal law.

This Certification is made under the penalty of perjury.

1. The funding sources for all of the job classifications listed on the attached Local Educational Agency (LEA) RMTS Time Survey Participant (TSP) List for participation in the SMAA program's RMTS are not fully federally funded nor is 100% of their funding used to calculate the ICR.
2. When the funding sources for any of the jobs on the attached LEA RMTS TSP List is partially federally funded or partially funded by the ICR, their costs are calculated proportionately for reimbursement.
3. The funding sources for all job classifications listed in the LEA's TSP List meet the requirements for certified public expenditures set forth in 42 Code of Federal Regulations part 433.51.
4. The Public Agency will maintain documentation supporting the allowable funding sources. This documentation must include all reports required for Medi-Cal desk reviews, site visits, and audit.
5. The Public Agency acknowledges that all records of funding sources are subject to review and audit by DHCS.

When a TSP Position Becomes Vacant

The position may remain in the time study – but the person does not.



Vacancy ≠ Automatic Replacement

Temporary coverage does not automatically make someone the replacement TSP.



Coordinator Action

- ✓ Notify/update Region 9 as required
- ✓ Confirm the employee's last working date
- ✓ Do not allow another employee to respond to the original TSP's moments
- ✓ Contact Region 9 if you're unsure whether a replacement is allowable



RMTS System Termination Request Forms

Two forms. Two situations. Use the right one.



When a Time Survey Participant (TSP) is no longer working in a position that is part of the RMTS sample, LEC RMTS Coordinators **must** submit a termination request in the RMTS system using the appropriate form below.



RMTS SYSTEM REQUEST FOR TSP TERMINATION FROM RMTS SYSTEM

Use this form when a TSP is:

- Leaving the position or the district
- Retiring
- Resigning
- No longer working in a position included in the RMTS sample



Key things to include:

- Upcoming moments
- Replacement information (if any)
- Notes
- Future quarter update request (Yes/No)

LEC SMAA Local Educational Consortium School-Based Medi-Cal Administrative Activities
Region 9 • Imperial, Orange, and San Diego Counties
Administered by the Orange County Superintendent of Schools

..... RANDOM MOMENT TIME SURVEY (RMTS) SYSTEM
REQUEST FOR TIME SURVEY PARTICIPANT (TSP)
TERMINATION FROM RMTS SYSTEM

DISTRICT: _____
RMTS YRQTR: _____
CHANGE REQUESTED BY: _____
TSP NAME: _____
TSP JOB CATEGORY: _____
TSP TITLE: _____
TERMINATION DATE: _____
UPCOMING MOMENTS: _____
IS THERE A DIRECT REPLACEMENT? YES ☐ NO ☐
REPLACEMENT NAME: _____
EMPLOYEE ID#: _____
REPLACEMENT EMAIL ADDRESS: _____
REPLACEMENT BEGIN DATE: _____
NOTES: _____
*IF THIS CHANGE IS BEING REQUESTED TO UPDATE A FUTURE QUARTER, SHOULD THE VACANCY BE DELETED? YES ☐ NO ☐

Orange County Department of Education
2025-24-00011 Only County Superintendent of Schools
200 Education Drive • P.O. Box 10000 • Costa Mesa, CA 92626-0000 • Phone: (714) 946-4800 • Fax: (714) 796-2967



RMTS SYSTEM REQUEST FOR TSP EXTENDED LEAVE*

Use this form when a TSP is:

- Going on an approved leave of absence
- Expected to return to the same position



Key things to include:

- Type of leave
- Leave begin and end dates
- Paid status (Yes/No)
If unpaid, include last day in a paid status and upcoming moments
- Replacement information (if any)
- Notes

LEC SMAA Local Educational Consortium School-Based Medi-Cal Administrative Activities
Region 9 • Imperial, Orange, and San Diego Counties
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..... RANDOM MOMENT TIME SURVEY (RMTS) SYSTEM
REQUEST FOR TIME SURVEY PARTICIPANT (TSP)
EXTENDED LEAVE*

DISTRICT: _____
RMTS YRQTR: _____
CHANGE REQUESTED BY: _____
TSP NAME: _____
TSP JOB CATEGORY: _____
TSP TITLE: _____
TYPE OF LEAVE: _____
LEAVE BEGIN DATE: _____ LEAVE END DATE: _____
PAID: YES ☐ NO ☐ IF UNPAID - LAST DAY IN A PAID STATUS: _____
UPCOMING MOMENTS: _____
IS THERE A DIRECT REPLACEMENT? YES ☐ NO ☐
REPLACEMENT NAME: _____
EMPLOYEE ID#: _____
REPLACEMENT EMAIL ADDRESS: _____
REPLACEMENT BEGIN DATE: _____
NOTES: _____
* SUBMIT THIS FORM ONLY IF TSP RECEIVES A MOMENT AND WILL NOT RETURN WITHIN 4 STUDENT ATTENDANCE DAYS TO RESPOND TO THEIR MOMENT.

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TIP: Submit requests as soon as possible to keep RMTS records accurate and ensure appropriate moments are sent.

Calendars & Shifts Matter

RMTS should sample employees when they are actually scheduled to work.



CALENDAR

What days could they work?

- Identifies working vs. non-working days
- Reflects the employee's work schedule



SHIFT

What hours could they work?

- Defines the participant's available workday
- Should reflect actual scheduled hours



RANDOM MOMENT

When can they be sampled?

- Moments are randomly generated within the established calendar and shift



VALID TIME STUDY

Accurate data you can trust.

- Ensures moments represent time when the participant is actually scheduled to work



Why accuracy matters:

An incorrect calendar or shift can result in a participant receiving a moment when they are **not actually scheduled to work.**

Updating the Staff Pool List

It is essential for LEAs to have an accurate TSP list, as the information will be used **to include the costs** associated with staff for both the quarterly SMAA invoice and to claim services through the LEA Billing Options Program (and/or Targeted Case Management).

All updates will now be completed on your **LEA's 26-27 Q2 TSP List spreadsheet**

District Name	TSP's Job Category	TSP's Job Title	Shift (i.e. Mon to Fri 7:30 am - 4:30 pm)	Employee's Last Name	Employee First Name	Employee's Email	Employee ID	Employment Status	Begin Date
Apple Unified School District	Pool 1 - Speech-language pathology assistant	Speech Language Pathologists Assistant	SLP M-W-F 8:00 AM - 3:30 PM	Smith	Sara	ssmith@appleesd.org	987321	District Payroll	10/01/22
Apple Unified School District	Pool 1 - Credentialled school psychologist	School Psychologists	PSYCH M-F 7:30 AM - 4:00 PM	Smith	John	jsmith@appleesd.org	987365	District Payroll	10/01/22
Apple Unified School District	Pool 2 - Secretary, Sr. Secretary	Front Office Assistant	Red Elem M-F 8:00 AM - 4:30 PM	Smith	Mary	msmith@appleesd.org	987654	District Payroll	10/01/22
Apple Unified School District	Pool 2 - Principal and /or Assistant Principal	Principal	Red Elem M-F 8:00 AM - 4:30 PM	Smith	Adama	asmith@appleesd.org	987254	District Payroll	10/01/22

District Name	TSP's Job Category	TSP's Job Title	Shift (i.e. Mon to Fri 7:30 am - 4:30 pm)	Employee's Last Name	Employee First Name	Employee's Email	Employee ID	Employment Status	First Date in Job Title
	<i>select from drop-down</i>							<i>select from drop-down</i>	
	<i>select from drop-down</i>							<i>select from drop-down</i>	
	<i>select from drop-down</i>							<i>select from drop-down</i>	
	<i>select from drop-down</i>							<i>select from drop-down</i>	
	<i>select from drop-down</i>							<i>select from drop-down</i>	

Note: The terms Staff Pool List and TSP List and can be used interchangeably.



FY 2026/27 Q2 RMTS

(October – December 2026)

RMTS Task	Due Dates
 Review and certify the Calendar in the RMTS System.	 Friday, August 28, 2026
 Review, update, and certify the Staff Pool List/TSP List in the RMTS System.	 Friday, August 28, 2026



- If you have questions regarding Calendar, Shifts (work schedules), or Staff Pool List updates/certification, please contact us at ocdesmaa@ocde.us
- New for FY 2026/27 – our office will email your **LEA's FY 2026–27 Q2 TSP List spreadsheet** for review and updates.



TIP:

Submit updates early to ensure your TSP List is accurate and your RMTS sample is not delayed.

RMTS Calendar Certification

Once certified, calendars are locked to protect the integrity of the time study.



Once an RMTS calendar is certified, it becomes **locked**.



If there is a change to the calendar, please contact our office (ocdesmaa@ocde.us).



Once moments have been generated, **calendars for the active quarter cannot be modified**. Only future calendars can be updated when the respective quarter opens.



Key Takeaway:

Certification locks the calendar and protects the accuracy and validity of the RMTS process for all participants.

The RMTS System

- The terms RMTS System and PCG Claiming System refer to the same platform.

PCG CLAIMING SYSTEM
California SoCal



Welcome to the PCG
Claiming System for
California SoCal.

Region 9 LEC RMTS System is located at:

<https://claimingsystem.pcgus.com/ca89>





Compliance Monitoring



Why is this important to monitor? RMTS results are used to allocate costs for school-based reimbursements for both SMAA and LEA BOP.



LEA may have penalties if the minimum 85% DHCS required response rate is not met.

- Beginning with FY 23/24 Quarter 2, the 85% moment response compliance guideline was reinstated with the end of the Public Health Emergency.
- How each LEA participates affects all other LEAs within the region and entire consortia.



What if your LEA falls below the 85% compliance?



1 FIRST OCCURRENCE:

A warning letter is sent to all impacted parties (e.g., LEA Superintendent, LEA RMTS Coordinator, LEA BOP Coordinator, LEA SMAA Coordinator, etc.) as soon as possible after notifying DHCS but within thirty (30) days after the end of the non-compliant quarter. The RMTS Administrative Unit must further collaborate with DHCS for outreach to and education of the non-compliant LEAs.



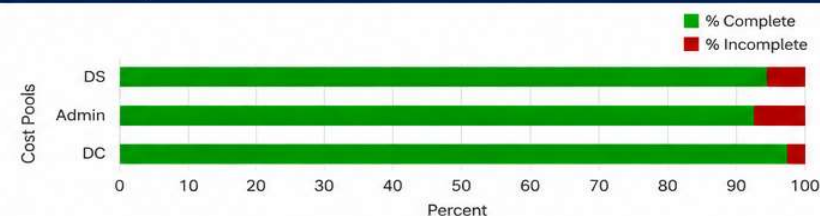
2 SECOND OCCURRENCE (WITHIN THE SAME FY):

LEAs that fail to meet the combined pool response rate of 85 percent for a second quarter, within the same FY, will be placed on a corrective action plan by their RMTS Administrative Unit. If the LEA is non-compliant for a third quarter in a FY, that LEA may not claim or receive federal funding for the participant pool(s) that did not meet the 85 percent response rate for all non-compliant quarters, and may be disenrolled from the program(s).



TIP: Strong participation from every LEA protects everyone's funding and keeps our programs successful.

Moment Compliance



Cost Pool	Moments Submitted	Moments To Date	Follow-Up	Percent Submitted	Total Moments
Direct Service Providers	2710	2761	0	98%	2761
Administrative Service Providers	2642	2761	0	96%	2761
Direct Charge	0	0	0	100%	0
All Pools	5352	5522	0	97%	5522

Region 9: Our Q1 Wins & Lessons Learned

What we learned together during the transition



1

THE CHALLENGE

Calendars Were More Complex Than Expected



Every LEA operates differently.

- Multiple calendars across LEAs
- Different work schedules among TSPs
- Needed to account for all paid working time
- "Floating days off" required additional clarification



Lesson Learned:

One calendar doesn't fit everyone.

2

THE REGION 9 SOLUTION

Simplify the Setup

Region 9 developed a standardized TSP/Calendar/Shift Template.



3

THE WIN

Collaboration Made the Transition Work



- ✓ Created a consistent process across Region 9
- ✓ Reduced the burden on LEA Coordinators
- ✓ Improved accuracy of TSP, calendar & shift information
- ✓ Gave coordinators an opportunity to review before certifying
- ✓ Identified issues early that will improve future quarters



Key Takeaway:

Q1 taught us that **accurate RMTS sampling** starts long before the first moment is generated – it starts with **accurate TSP, calendar and shift data**.

Synthesizing Pro-Tips for Quarter 2 Success



Respond Early

Encourage participants to answer moments within 24 hours. This daily habit secures the 85% requirement.



Ask Questions

If a narrative seems unclear, reach out to the LEC for technical assistance before it is finalized.



Share Changes Immediately

If a staff member leaves or a schedule changes unexpectedly, notify the LEC instantly to adjust the sampling pool.



Partner with Region 9

We are your teammates. Use our weekly monitoring reports as your operational roadmap for the week.

The 85% Compliance Benchmark



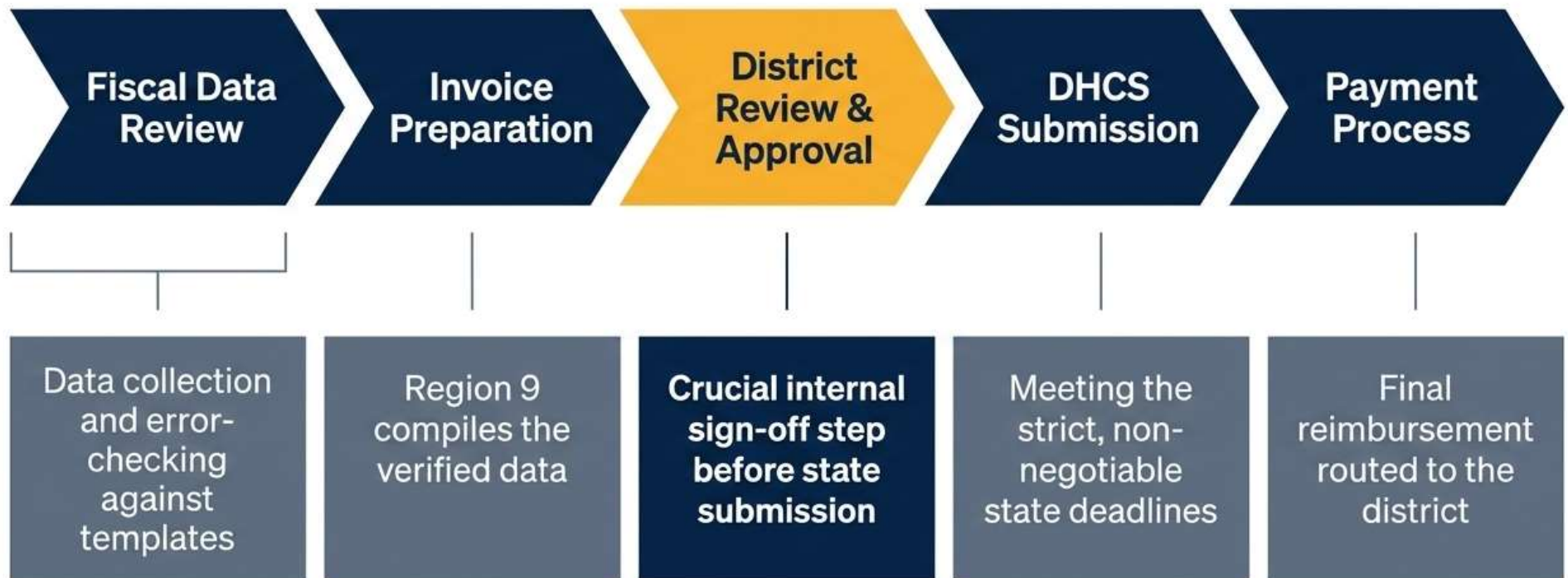
85% Valid RMTS Response Rate.

This is our collective benchmark for excellence and the strict minimum requirement for full reimbursement.

The Strategy: 24-Hour Intervention

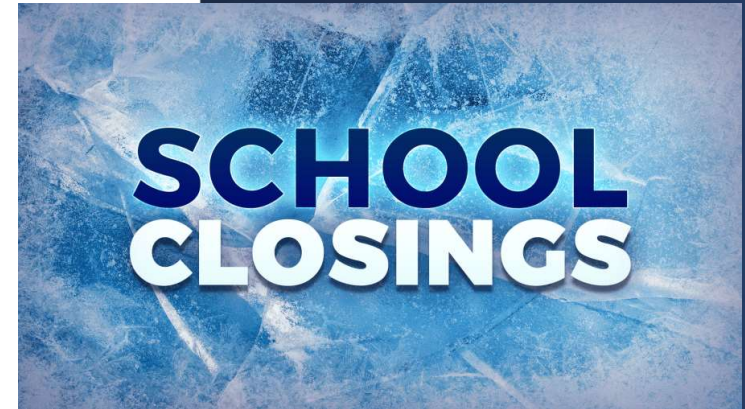


The SMAA Invoice Process Flow



Unplanned Closures

- An unplanned closure is an event that closes a school for unforeseen circumstances such as a fire, power outage, snow, etc. (no students in session)
- Please contact the LEC Office. Paperwork is necessary for any unplanned closure. These dates will be marked in blue on the RMTS system calendar.
- Our office can provide guidance on how they should respond to their moment on these days.
- This will not prevent moment notifications from being sent to TSPs, but it will extend the number of days the TSP has to respond.



The background of the slide features a photograph of a school campus. On the left, a man in a light blue shirt and red tie is smiling and talking to a young boy in a blue polo shirt. On the right, a woman in a white sleeveless top and blue pants is smiling and talking to a young boy in a red polo shirt. They are standing on a paved area in front of a modern school building with large windows and a metal roof. Trees and greenery are visible in the background.

What Success Looks Like in FY 2026–27

A seamless partnership that translates directly into better resources for our students and communities.

- Submitting all RMTS and fiscal information by the published deadlines.
- Maintaining an RMTS valid response rate well above the 85% threshold.
- Keeping Staff Pool Lists and participant information flawlessly current.
- Communicating early when issues arise, rather than waiting for deadlines.

Partner with Region 9—we are here to support your district's success.



- Coder training was held on Wednesday, July 29-30, 2026.
- Coding Review Change (LEC/DHCS/LEA to LEA/LEC/DHCS)
- Medi-Cal Eligibility Rate (MER) issue
- DHCS must review all TSP training materials
- Supporting documentation for Code 2A



REGION 9 LEC - PROGRAM UPDATES

Orange/san Diego/imperial

- FY 2025/26 Q4 Coding Reports will be going out next week.
- FY 2024/25 Q4 are going out for signatures now.
- Calendars for FY 2026/27 are in your packets
- Audit Binders

Coding Review – FY 24/25 Quarter 4

- Verify attendance - supporting documentation needs to be in audit files
- Verify all Code 18 moments - this is the last chance to reclassify a TSP that was on paid/unpaid time off
- Confirm if documentation exists to support LEA BOP activities (Code 2A)
- Review all coded moment responses

**LEC
SMAA**

LOCAL EDUCATIONAL CONSORTIUM SCHOOL-BASED MEDI-CAL ADMINISTRATIVE ACTIVITIES
 REGION 9 • IMPERIAL, ORANGE, SAN DIEGO
 ORANGE COUNTY DEPARTMENT OF EDUCATION

LEA CODING REVIEW REPORT CERTIFICATION
 FY 2024/25 Q3

Claiming Unit Name:
 Claiming Unit Coordinator Name:
 Total Number of Moments Assigned & Reviewed:

☐ Verified ALL of TSP attendance (Paid/Unpaid Time Off)
☐ Verified ALL Expired Moments

☐ Verified Code 2A Moments Accuracy and Supporting Documentation
☐ Verified Correct Coding of ALL Moments

Please indicate necessary changes below:

LEA CODING REQUESTED CODING CHANGES				
TSP Name	Moment Date & Time	Original Code	Proposed Code	Reason for Coding Change?

CERTIFICATION STATEMENT

I, the undersigned, certify that I have reviewed all random moment time survey responses submitted by the time survey participants from my claiming unit for the above noted contract year and quarter. I also certify that, to the best of my knowledge and belief, this report is true and correct and all related data, including supporting documentation of direct medical services and employee attendance verification has been reported in accordance with state regulations for both school-based Medi-Cal programs. This Certification is made under penalty of perjury and I understand that making false statements for the purpose of filing a false or fraudulent claim is punishable under Welfare and Institutions Code sections 14107, 14107.11 and other applicable provisions of law.

Name: _____

CLAIMING UNIT COORDINATOR SIGNATURE: _____

Title: _____

DATE: _____

Region 9 LEC – SMAA Invoices

FY/QTR	DUE TO LEC	DUE TO DHCS
24/25-Q4	August 30, 2026	September 30, 2026
25/26-Q1	October 17, 2026	December 31, 2026
25/26-Q2	January 30, 2027	March 31, 2027
25/26-Q3	April 30, 2027	June 30, 2027

SMAA Invoices along with all supporting documentation will be submitted to the LEC via our SFT. The district and LEC will concurrently review all information submitted.

Once the LEC's SMAA Invoice review is complete, the SMAA Coordinator will receive an email from the Region 9 LEC office to confirm that the LEA has reviewed the invoice and there are no findings and requesting the Authorized Business Official's name, title, and email address.

The invoice is then sent via Adobe Sign and the SMAA Coordinator (or other) is copied. All parties receive a fully executed copy automatically from Adobe Sign. The LEA should retain a copy of all invoice related documents in their audit records.

Region 9 LEC Program Calendar

LEC
SMAA

Local Educational Consortium School-Based Medi-Cal Administrative Activities
Region 9 Imperial, Orange, and San Diego Counties
Administered by the Orange County Department of Education

2026-2027 Program Calendar

July 2026						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

August 2026						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

September 2026						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

October 2026						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

November 2026						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

December 2026						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

January 2027						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February 2027						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

March 2027						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

April 2027						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

May 2027						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June 2027						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

OCDE & LEC Holidays

Region 9 Invoice Dates

F/Y	Qtr	Due
26/27	Q1	10/30/26
26/27	Q2	2/26/27
26/27	Q3	5/31/27
26/27	Q4	8/31/27

Dates for billing vendors to upload to SFT

Qtr 1 Mandatory Training (9AM-12PM)

8/5/26	ICOE Valley Academy
8/6/26	OCDE Bldg D Combo 3-4
8/7/26	San Diego Wiggins Ctr Room B5
Qtr 2 Meetings (9-11AM)	
10/1/26	ICOE Valley Academy
10/5/26	OCDE Board Room
10/9/26	High Tech High Forum Bldg

Qtr 3 Meetings (9-11AM)

2/2/27	OCDE Board Room
2/3/27	ICOE Valley Academy
2/4/27	High Tech High Forum Bldg
Qtr 4 Meetings (9-11AM)	
5/4/27	OCDE Bldg D Combo 1-2
5/6/27	ICOE Valley Academy
5/10/27	High Tech High Forum Bldg

RMTS System Dates

F/Y	Qtr	Open Date	Calendar Due	SPL Due
26/27	Q1	4/20/26	5/22/26	5/22/26
26/27	Q2	8/4/26	8/28/26	8/28/26
26/27	Q3	10/26/26	11/13/26	11/13/26
26/27	Q4	2/1/27	2/12/27	2/12/27

Program Resources

- Region 9 LEC Webpage <https://ocde.us/Medi-CalAdministrativeActivities/Pages/default.aspx>
- SMAA Webpage <https://www.dhcs.ca.gov/provgovpart/pages/smaa.aspx>
- LEA BOP Webpage <https://www.dhcs.ca.gov/provgovpart/Pages/LEA.aspx>
- RMTS Webpage <https://www.dhcs.ca.gov/provgovpart/Pages/School-Based-RMTS.aspx>

Region 9 LEC Contacts

Name	Title	Phone	Email
Rosalee Hormuth	Administrator	714-708-3861	rhormuth@ocde.us
Patti McIntyre	Coordinator	714-708-4980	pmcintyre@ocde.us
Charlie Wu	Program Specialist	714-708-4981	cwu@ocde.us
Vacant	Project Accountant		
Chelsea Metrulas	Project Accountant	714-708-4984	cmetrulas@ocde.us
Michiko Kiyomura	Project Accountant	714-966-4174	mkiyomura@ocde.us
Miriam Marks	Program Data Technician	714-708-4994	<u>mmarks@ocde.us</u>

ocdesmaa@ocde.us

Main Program Line: 714-708-4982

Thank You!

**Your commitment makes
the SMAA Program successful.**



THANK YOU

for your dedication,
collaboration, and the
work you do every day.



TOGETHER

we navigate change,
solve challenges, and
create solutions.



TOGETHER

we make a meaningful
impact for students
across our region.



We appreciate you!

Thank you for being an essential part
of the Region 9 SMAA community.

