Information & Documents Needed to Set up a
New Community Based Organization (CBO) Claiming Unit

1. *Schedule a date for Time Study Training for all staff who will time study (must complete prior to start of new quarter). Need 1.5 hours for the training. Best to train a week or less before starting time studying – too far in advance doesn't work as well.*

2. Answer questions needed to set up unit and create Activity Sheets (complete one month before quarter starts). Note – Answers directly correlate to questions in labeled Activity Statements noted in italics.
   - Decide if new unit will be using countywide Medi-Cal rate or Actual Client Count. If using Actual Client Count, will need to share client names and dates of birth at the end of each quarter. (*Activity Sheets 6 and 15-18*)
     o If using the organization's Medi-Cal rate, how is that generated? Such as which electronic system tracks this information. Can reports be run quarterly?
   - Who will be helping set up trainings and time study reminders? Can assign a special code (19) to this person for time studying. *(Activity Sheet 19)*
   - Who will be matching time studies to time sheets each month (payroll verifications)?
   - Do staff submit time sheets every other week or once per month?
   - Please provide the dates for a recent pay period, such as December 8 – December 21 or January 1 – January 31.
   - Describe the population served by your organization. *(Activity Sheets 4 and 6)*
   - What is the address(es) where services are provided? *(Activity Sheets 4, 6, and 15-18)*
   - Besides the office address(es), what other locations are services provided? Such as client's homes and various community settings, in person and by telephone. *(Activity Sheets 4, 6, and 15-18)*
   - Do staff work later than 5pm or weekends? *(Activity Sheet 4)*
   - As part of case management services, do staff ever help clients arrange transportation to medical/dental/mental health appointments? This could be working with managed care plans to schedule rides. *(Activity Sheet 6)*

3. Documents Needed (one month before quarter starts):
   - Organizational Chart, if available, listing all staff names, classifications, and reporting structure.
   - List of staff names, employee #'s, email addresses, and their regular schedule (such as 8 hrs Monday – Friday) for set up in online time study program. See Spreadsheet "[Time Study Set Up Info Needed – Community Based Organization](#)" and fill in blanks.
   - A one paragraph description for each job classification. I use these descriptions to create *Duty Statements* (needed for CMAA Plan).

- If available, resource guide that lists mental, physical, or oral health resources that is used by staff or provided to clients. (*Activity Sheet 15-18*)
- If available, copies of any flyers or outreach materials with information about applying for Medi-Cal. *(Activity Sheet 4)*
- Copy of your organization's paid holiday calendar.
- Copy of your organization's policy related to providing materials to clients in alternative formats (such as braille or sign language). If you don't already have a similar policy in place, we can provide sample language for you to develop a policy.

4. Send *Duty Statements* to staff and ask them to sign prior to first day of time study.

5. Make sure all time study participants attend initial training and organize make-up training sessions for any staff that miss the training. Staff can't start time studying until they complete an initial time study training.