

Information & Documents Needed to Set up a New County Department or Division 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)*
 - 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 downloading biweekly payroll report? I can help this person set up *IntelliTime Analytics* so the report pulls the data needed and show them where to save the report.
 - What is the address(es) where services are provided? *(Activity Sheets 4, 6, and 15-18)*
 - Besides the county address(es), what other locations are services provided? Such as client's residences and various community facilities or settings, in person and by telephone. *(Activity Sheets 4, 6, and 15-18)*
 - Describe the population served by your department. *(Activity Sheets 4 and 6)*
 - 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)*
 - Are there any contracts managed by this claiming unit? *(Activity Sheet 12-13)*
 - If yes, do any of them relate to physical, mental, oral health, or substance disorders?
 - If yes, please list contracts here and a 1 sentence description for each contract and send copies of contracts.)
 - List staff positions who are managing these contracts.

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 system. See Spreadsheet [“Time Study Set Up Info Needed – County Unit”](#) and fill in blanks.
 - 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 department’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.