MAC Training FAQs

1) What is the purpose of MAC training?

The MAC program relies on accurate documentation from claimants as a means to verify and approve each claim; that documentation comes from MAC surveys. Those who complete the online surveys—county/district employees selected by the Local MAC Coordinator--must therefore be knowledgeable in how to fill out and submit the surveys. The survey forms use a coding system similar to the work codes that LPHA human-resources departments use for tracking categories of work activities for payroll payment purposes. For MAC surveys, each of the codes and subcodes that are entered by an employee onto the form denote a specific activity that the employee engaged in during a corresponding time interval; as there are a total of 24 codes and subcodes from which to choose for denoting a specific activity, a comprehensive training is critical in order for every survey to be as accurate as possible.

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2) What is the process for training someone in MAC for the first time?

1. The Local MAC Coordinator (LMC) determines that an employee is a good candidate for the department's MAC "cost pool" (the group of employees that will be expected to complete MAC surveys during a coming quarter), and then informs the employee of the training requirement.
2. The employee must, at minimum, view the following videos accessible via the links on the *MAC Support* page of the MESD website (https://sites.google.com/cascadetech.org/mac/oregon-public-health):
    a. The three "Health Dept. Training Videos"; and
    b. "Video Training - How to complete the MAC Survey"; and
    c. "Video Training - Reopened Survey - How to Code Missing Time."
3. It is highly recommended, though generally not required, that the LMC also:
    a. Ask the OHA MAC Specialist to schedule a "live" (i.e. virtual, or in-person if possible) supplemental training with the employee; or
    b. Provide such training themselves (again, either online or in person); and/or
    c. If appropriate, encourage employee to avail supplemental MAC training tools (see list below in FAQ #14 "What training tools are available?").
4. Once an employee has informed the LMC of completing MAC training, the LMC will make a note of the date when training was completed for that employee.
5. No later than the second-to-last working day of a quarter, the LMC must enter information on the employee, and any other first-time MAC trainees trained during that quarter, into the "MAC Training of First-Time Trainees" form (see how to access the form under FAQ #8 below "What MAC forms do I use to certify training?"); by no later than 3 PM on that same day--
6. The LMC must send the form to MESD (macmedicaidsupport@cascadetech.org).

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3) What is the process for re-training someone in MAC?

1. The LMC determines that an employee who is currently a cost pool member, or who has been a cost pool member in the past, will be included in the cost pool for the next MAC quarter.
2. The LMC checks to determine whether that cost pool member's "trained" status has, or will before the next quarter, lapse (See below FAQ #4 "How will I know when the 'trained' status of a cost pool will lapse?'").

3. The LMC determines what areas of MAC re-training the employee should focus on in order to improve their familiarity with MAC claimable activities/codes/survey procedures. This determination process should include a review of the employee's most recent survey results, and a conversation with the employee to discuss issues that could possibly be addressed with a review of specific MAC topics. The LMC then instructs the employee to view those portions of the three "Health Dept. Training Videos" containing material that the LMC and employee have mutually agreed would be appropriate for the employee's review.
4. Once the LMC is satisfied that the employee has been adequately re-trained, the LMC will include that employee's name, and the date of the re-training, on the Training Log for the next quarter. (See how to access the form on list under FAQ #8 below: "What MAC forms do I use to certify training?")
5. The LMC sends the Training Log for the upcoming quarter to MESD no later than the second-to-last working day of the current quarter.

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4) How will I know when the "trained" status of a cost pool member will lapse?

You will find a list of your current cost pool participants on the MESD website for MAC administration:

1. Log in from "MAC Links" on the *MAC Support* page for Oregon Public Health to gain access to the MESD admin section.
2. On the left-hand side of the "Dashboard" page, click on the link for "Training Status."
3. On the "Training Status" page, first make sure that the current quarter is showing in the top right corner of the page, right after "County Health Depts"; if not, click on the arrow next to the quarter's name for a dropdown box from where you can select the current quarter.
4. The quarter's "Training Status" page will list all of the participating LPHAs; find your LPHA and then go to the column headed "Training Complete."
5. A number in that column will show the number of your employees whose training is current (making them eligible for the current cost pool); click on the number.
6. You will be taken to the "Training Complete" page, where the name of each trained employee is listed, along with other info; the last column for each employee shows the "Training Expires" date.
7. Keep in mind that the date on which each employee's training actually expires is the last day of the quarter immediately preceding the quarter of the date shown in the "Training Expires" column. If the most recent training date for a cost pool participant is ***more than nine months prior to the start date for the next quarter***, that individual's trained status will ***lapse at the end of the current quarter***. Another way to look at this is to determine in what quarter the most recent training date took place—that quarter was the "training quarter" for that individual, and that person must be re-trained before the start of the "anniversary quarter" of the training. For example, a cost pool participant whose anniversary date for training was in September of the previous year (let's say 2021) will have their training lapse before Summer Quarter of the following year (2022 in this case), because Summer 2022 marks the anniversary quarter, when training lapses.

Let's say that Employee "A" completes MAC training on March 15.

2022																			
Winter (First) Quarter																			
January							February							March					
						1			1	2	3	4	5			1	2	3	4	5
2	3	4	5	6	7	8	6	7	8	9	10	11	12	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28						27	28	29	30	31		
30	31																			

Employee "A" is eligible for the next (Spring 2022) quarter's cost pool. So, if the LMC includes "A" in the next quarter's cost pool, "A" will start completing MAC surveys beginning the first survey day of that quarter; let's say it's on April 5.

1st MAC survey day of Spring

Spring (Second) Quarter 2022																			
April							May							June					
					1	2	1	2	3	4	5	6	7				1	2	3	4
3	4	5	6	7	8	9	8	9	10	11	12	13	14	5	6	7	8	9	10	11
10	11	12	13	14	15	16	15	16	17	18	19	20	21	12	13	14	15	16	17	18
17	18	19	20	21	22	23	22	23	24	25	26	27	28	19	20	21	22	23	24	25
24	25	26	27	28	29	30	29	30	31					26	27	28	29	30		

"A" will continue to complete all four of Spring Quarter's surveys (highlighted). If the LMC wants "A" to stay in cost pools for Summer and Fall, the LMC will include "A's" name on the cost pool lists for those quarters. "A" can remain in those two quarters' cost pools without having to be re-trained.

At some point during Fall Quarter, "A" will need to be re-trained, as "A"'s trained status will lapse at the end of the quarter—that is, on Dec. 31. Per MAC protocol, any training taking place during a quarter must be completed by 3 PM on the second-to-last working day of the quarter, and so—in this case—Dec. 29 is the absolute deadline for training for those who will be in the next quarter's cost pool. Let's say that "A" completes re-training on Dec. 21, and that "A"'s certification is sent to MESD by Dec. 29…

Fall (Fourth) Quarter 2022																			
October							November							December					
						1			1	2	3	4	5					1	2	3
2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10
9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17
16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24
23	24	25	26	27	28	29	27	28	29	30				25	26	27	28	29	30	31
30	31																			

"A" is now eligible for MAC participation through the first three quarters of 2023.

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5) Why do cost pool members have to be re-trained every three quarters in order to stay in the cost pool?

The short answer is that annual re-training of MAC survey-takers is a contractual obligation between Oregon Health Authority and the federal Centers for Medicaid and Medicare Services.

The long answer is that periodic re-trainings provide a standardized, formal, somewhat structured means by which individuals—whose regular job responsibilities do not include, nor require, knowledge/skills in MAC coding and surveytaking—will nonetheless be reminded of the importance of giving an accurate accounting of their activities on MAC survey days, and be afforded an opportunity to learn something new.

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6) As the LMC, I want to train Jane Doe at the same time that I'm re-training other cost pool members, but I will not be adding her to next quarter's cost pool (let's say that it is Spring in this case) as she will be on maternity leave for most of that time. If Jane's first quarter of actual survey-taking is then on the subsequent (Summer) quarter, will her training be valid through Spring Quarter of next year?

The "warranty" of an individual's trained status is based on the length of time from that person's most recent training date, not on the time from the first MAC survey day that falls after that date. In this example, Jane's training (whether it's her first or a re-training is irrelevant to the question) is taking place in the Winter of Year 1, and she will be on leave and therefore not participating during Spring of the same year. Her trained status will lapse just before the start of her "training anniversary" quarter, which in this case is Winter of Year 2. Even if Jane does not participate in any MAC surveys during Year 1, she will still need to be re-trained before the end of that year.

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7) Why are there different certification forms for first-time trainees and returning trainees?

The form for first-time MAC trainees contains information that needs to be loaded into the MESD system in order for that individual to be eligible for a future cost pool; specifically, the form will contain—in addition to the person's name—the individual's job title, job location, FTE, MAC ID #, and email address. These identifiers are important to either (a) aid in a review of survey data to identify potential anomalies in survey results, or (b, in the case of the MAC ID #) ensure that the system does not get confused when there may be two or more individuals in the MESD system with the same name.

Once these data are entered into the MESD system, the only information that is needed for certifying returning cost pool members who have been trained at least once before is their name and the date of their most recent training. The system will match the name of the trainee on the Training Log with those data already in the system that are associated with that name.

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8) What MAC forms do I use to certify training?

There are two forms to use for certification of MAC training of staff:

1. "MAC Training of First-Time Trainees" form must be used to certify training of an individual who has completed MAC training for their first time. The form includes the name of the county or district employing the trainee(s), and each trainee's name, title, FTE, job location, MAC ID #, email address, and the date on which the individual(s) completed training. The form can be used for certifying one or multiple trainees. The comprehensive information on the form makes it possible for MESD to load all of the specific data on each respective MAC novice that helps a reviewer of survey data (e.g. an LMC or the OHA Specialist) to evaluate how each cost pool member is affecting the county's/district's overall claim.

   Note: By signing the "First-Time Trainees" form, the ***Local Coordinator attests that those individuals listed on the form have watched all three "Health Dept. Training" videos in their entirety, AND that the trainee(s) have indicated sufficient understanding of MAC in order to accurately complete and submit the surveys.*** See FAQ below ("How should the training videos be used?") for more on this.

2. "Training Log": This form is used to certify re-training of returning cost pool members. Only the name and training date need to be entered into the form, as the MESD system will already contain other important information about the employee(s) such as title and FTE, from the first-time trainee form.

The first-time trainee form is available for downloading from the *MAC Support* page of the MESD website. A Training Log specific to the next quarter's cost pool is emailed to all LMCs about five weeks ahead of the start of that quarter.

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9) MAC used to employ a "train the trainer" principal; that is, an individual who received MAC training directly from OHA could then train and certify any other individual in MAC, and that person in turn could also serve as a trainer. Is that still the case?

See response to next FAQ.

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10) The *MAC Manual* has instruction that says that each LMC should designate a "Local Trainer" to handle a county's/district's MAC-training duties. Is that still current?

In the past, there were some MAC protocols that relied on a "train the trainer" principal, but that practice is no longer valid. Since September 2021, these are the changes affecting MAC training protocols:

1. The Local MAC Coordinator no longer needs to designate (or self-designate) a Local MAC Trainer. The LMC must continue to manage all local MAC training; that is, the LMC is still responsible:
   a. to ensure that each quarter's cost pool is adequately trained,
   b. to ensure that trained status of cost pool members is up to date,
   c. to ensure that all certifications of training are submitted in time, and
   d. for serving as a local resource for their cost pool members' questions about MAC.

2. The MAC training videos available for viewing / downloading on the MESD *MAC Support* page replace all MAC training materials previously posted on the MESD website, including any and all versions of MAC training power points and the "self-test module".
3. The "MAC Training Sign-in Sheet" which formerly served as certification of training (and is Appendix A in the *Manual*) is now replaced by the two forms cited in the FAQ immediately preceding this one.

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11) How should the training videos be used?

As stated above, the videos are intended to be a comprehensive training tool for your cost pool. From the MAC page on the MESD website, they can be accessed by anyone, or any time. It is up to the LMC's discretion whether (a) to schedule a time when multiple employees view the videos together / simultaneously, or (b) to have individuals view the videos as each person's time allows.

First-time trainees must view all three "Health Dept" videos and the "How to complete the MAC survey" video; the LMC must attest to each trainee's completion of these requirements by signing the form certification.

It is recommended that returning cost pool members review those sections of the videos that cover those areas where respective members have specific need for review. The LMC may determine, following a review of recent survey results and/or discussion with a cost pool member, which sections that individual should review. In any case, once the employee has completed review of those areas AND indicates an understanding of them, the LMC can then certify that individual's completed training via the relevant Training Log.

As an aid to retraining, following is an outline showing the location of MAC topics in the training videos:

<u>Video 1: Intro to MAC</u>

- Slides 2 - 5: What it is
- Slide 6: Oregon MAC programs
- Slide 7: MAC Benefits to your department
- Slides 8 – 10: Cost pool and surveys: what is a cost pool? How many surveys do cost pool members complete each quarter
- Slides 11 – 13: Logging in and completing your survey

<u>Video 2: Survey Basics, Activity Codes A1 and B1</u>

- Slides 14 – 16: Survey basics: Completing for all paid time, survey 'flags'(clocks)
- Slides 17 - : MAC Activity Codes
  - Slide 18: Code 'F'
  - Slide 19: Code 'E'
  - Slides 20 – 22: 'A1' and 'A2'
  - Slides 23 – 25: 'B1' and subcode 'B1.1'

<u>Video 3: Activity Codes B1 (continued), C1, D1; Documenting Claimed Time; Documentation Examples</u>

- Slides 26 – 34: Subcodes 'B1.2', 'B1.3', B1.4', 'B1.5' and 'B1' scenarios
- Slide 35: 'B2'
- Slide 36: 'C1' and subcodes

  - Slide 37 - 38: 'C1' scenarios
  - Slide 39: Recap of 'A1', 'B1', 'C1'
  - Slide 40: How 'D1' is different from 'A1', 'B1', and 'C1'
  - Slides 41 – 42: 'D1'
  - Slides 43 – 45: 'D1' scenarios
- Slides 46 – 48: Documenting your claimed time
- Slides 49 - 51: Documentation examples
- Slides 52 & 53: Tips on completing and submitting MAC surveys

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12) Does OHA still provide real-time MAC trainings as a substitute for reviewing the videos?

Yes; direct training from OHA is still an option in order to get certified. Contact the OHA Public Health MAC Specialist (David.v.anderson@dhsoha.state.or.us , 971-276-0412) in order to schedule a MAC training or trainings for your prospective or returning cost pool members.

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13) As an LMC, do I need to complete periodic retrainings?

All LMCs must complete a one-time LMC Orientation session with the OHA Public Health MAC Specialist at the time when they are appointed by their county or district to assume the LMC role; the Orientation encompasses all MAC training points covered in the videos; it is recommended, nonetheless, that the LMC also review the videos after the Orientation in order to gain background in what the cost pool's training covers.

Re retrainings: the answer is no, an LMC does not need to take periodic retrainings in order to maintain the LMC role. Of course, if the LMC is also a member of a cost pool, the LMC must complete the same trainings as any cost pool member in order to gain and retain "trained" cerification.

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14) What training tools are available?

On the *MAC Support* page of the MESD website, the materials which are required for review by first-time trainees are:

Under "Survey Participants":

2. Video Training - How to complete the MAC Survey ; and/or
3. Written Instructions - How to complete the MAC Survey; **and**
5. Video Training - Reopened Survey - How to Code Missing Time

These may also be used for refresher training for returning cost pool members.

Under "Health Dept Materials":

Health Dept Training Videos Parts 1, 2 and 3 (See FAQ #2 above for guidance on viewing these videos).

Also on the *MAC Support* page, the following helps are listed under "Health Dept Materials":

- Frequently Asked Questions – A link to a list of general FAQs about MAC rules, policies, and best practices.

- Training FAQs – A link to a list of FAQs re MAC training.
- MAC Activity Chart – A link to a spreadsheet of 27 types of activities that most often get coded on MAC surveys, and what corresponding codes should be used. The table includes columns that show the positions that can be expected to perform specific activities; if a cost pool member has a title different from those in the positions shown for a particular type of activity, chances are the activity is not being coded correctly. For example, an Office Specialist or similar type of position will not be expected to code any "D1" time, except for the specific types of activities (e.g. " Admin support for assessments, reports, and meetings") as shown on the chart.
- Flowchart – A link to a decision-tree model aimed to guide the process for determining what codes to use for denoting specific activities.
- Flowchart Guide – A link to a document explaining the flowchart and how to use it.
- Key to Flowchart – A link to a key explaining how shapes and colors used in the chart can further support specific coding decisions.