

CALIFORNIA DEPARTMENT OF AGING

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PROGRAM MEMO

CDA 1014 (Rev. 02/14)

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| TO: Area Agency on Aging Directors in Cal MediConnect Demonstration Counties | | NO.: PM 15-13 (P) |
| SUBJECT: HICAP | | DATE ISSUED: November 2, 2015 |
| Financial Alignment Grant Two Financial Alignment Contract FA-1516; Cal MediConnect Demonstration | | EXPIRES: September 30, 2017 |
| REFERENCES: PM 13-11 | | SUPERSEDES: N/A |
| PROGRAMS AFFECTED: | <input type="checkbox"/> All <input type="checkbox"/> Title III-B <input type="checkbox"/> Title III-C1/C2 <input type="checkbox"/> Title III-D <input type="checkbox"/> Title III-E <input type="checkbox"/> Title VII <input type="checkbox"/> Title V <input checked="" type="checkbox"/> HICAP <input checked="" type="checkbox"/> Other: Financial Alignment | |

Purpose

This Program Memo (PM) transmits your Financial Alignment (FA) contract, budget display, budget form (CDA 229FA), budget narrative template, budget narrative instructions, and work plan template for contract activities funded under the California Department of Aging's (CDA) second Federal Financial Alignment Grant (FA-1516) contract.

Contract Information

This contract is identified as the "FA-1516" contract. As a reminder, the first FA grant contract has a different number (FA-1316) as referenced in Program Memo 13-11. The first and second FA grant/contract periods overlap.

AAAs will use FA-1516 contract funds to provide additional and enhanced Health Insurance Counseling and Advocacy Program (HICAP) outreach, education and counseling related to Cal MediConnect. Funds will be used to educate providers and community-based partners and to provide assistance to individuals eligible for both Medicare and Medi-Cal (dual eligible beneficiaries) in understanding their options and choices under California's Cal MediConnect demonstration.

The FA-1516 contract term is from November 2, 2015 to September 30, 2017.

Background

The Centers for Medicare & Medicaid Services (CMS) awarded CDA a second grant (FA-1516) to support local HICAPs in providing expanded Cal MediConnect services that are above and beyond services provided under the first FA contract.

The Cal MediConnect demonstration is a joint effort between California's Medi-Cal program and the Federal Medicare program. The goal is to promote coordinated

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Background
continued

delivery of medical, behavioral health, long-term institutional and home- and community-based services through a single organized system to older adults and people with disabilities who are dually eligible for both Medicare and Medi-Cal. Cal MediConnect is part of the larger Coordinated Care Initiative (CCI) authorized pursuant to Senate Bill (SB) 1008 (Chapter 33, Statutes of 2012) and SB 1036 (Chapter 45, Statutes of 2012).

Contract Activities

FA-1516 funds should be used to:

- Increase training of Cal MediConnect HICAP staff to perform additional Cal MediConnect counseling, outreach, and community education services;
- Provide outreach, counseling, and community education services to Cal MediConnect-eligible beneficiaries and sub-populations that may not have been reached with the funding from the first FA contract;
- Provide outreach and/or education to providers, including, but not limited to, physician groups, board and care providers, and non-profit agencies who were not reached with the funding from the first FA contract to:
 - Address problems related to provider non-participation in the project; and
 - Assist beneficiaries who have continuity of care issues that could result in their opting-out of the project;
- Provide options counseling to beneficiaries eligible for Cal MediConnect who were not reached with the funding from the first FA contract.
- Provide counseling regarding coverage options under Medicare and Medi-Cal to beneficiaries who opted-out of Cal MediConnect;
- Provide options counseling to beneficiaries who were passively enrolled in a Cal MediConnect plan and are experiencing problems with their plan; and
- Expand existing partnerships and develop new community partnerships.

FA-1516 funds may be used to provide “other” services in addition to those listed above, as long they are not duplicative of services provided under the first FA contract.

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**Allocation/
Distribution
Methodology**

CDA will distribute \$900,000 in FA grant funding across two State Fiscal Years (SFY) to AAAs that are providing HICAP Cal MediConnect services. Approximately 67 percent of the funding is allocated in 2015-16 and 33 percent in 2016-17.

CDA will allocate the \$900,000 as follows:

1. A flat amount of \$294,000 is split evenly across the seven participating AAAs— 67 percent in 2015-16 and 33 percent in 2016-17.
2. The remaining \$606,000 is allocated based on each AAA's proportional share of the total Cal MediConnect eligible population – 67 percent in 2015-16 and 33 percent in 2016-17

**Documents
Required Prior
to Distribution
of Funds**

CDA must receive and approve the following documents no later than 30 days from the date of this PM:

- FA-1516 Budget Form (CDA 229FA)
- FA-1516 Budget Narrative
- FA-1516 Work Plan
- Fully Executed Contract

Note: CDA must have a fully executed contract on file before funds can be released.

**Budget Form
(CDA 229)
Submission
Instructions**

Each AAA must submit its FA-1516 Budget Form (CDA 229FA) in the following manner:

- Incorporate the amounts shown in your Budget Display as appropriate.
- Specify the administration amounts up to the maximum allowed of 10 percent.
- Submit FA-1516 Budget Form (CDA 229FA) electronically to your assigned CDA AAA Fiscal Team Specialist.
- Download the form and instructions at:
http://www.aging.ca.gov/ProgramsProviders/AAA/Fiscal_Form_Documents

Due Date: The completed budget form must be submitted no later than 30 days from the date of this PM. Please submit the form electronically to your assigned CDA Fiscal Specialist.

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Reporting Requirements

Client-level performance data must be entered into the State HICAP Automated Reporting System (SHARP) on a monthly basis and as specified in Exhibit E of the FA-1516 contract.

Mid-term, year-end, and final narrative reports must be submitted to CDA as outlined in Exhibit E of the FA-1516 contract. These reports include budgeted and actual expenditures and surplus/deficit by line item.

Contract Expenditure Deadline and Closeouts

Even though your FA-1516 contract term extends through September 30, 2017, AAAs must expend all funds in this contract by June 30, 2017. To ensure this deadline is met, please be diligent about submitting timely reconciled expenditure reports.

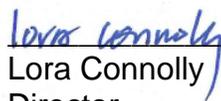
Instructions for "closing out" 2015-16 expenditures and for final contract closeout in SFY 2016-17 will be transmitted at a later date.

Questions

- Please contact your assigned CDA Fiscal Team Specialist if you have questions related to the budget.
 - Please contact Carol Berul at carol.berul@aging.ca.gov or 916-419-7560 if you have questions related to the contract provisions.
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Attachments

- FA 1516 Budget Displays are available for downloading from the CDA website at:
http://www.aging.ca.gov/ProgramsProviders/AAA/AAA_Budget_Displays/
 - FA 1516 Budget Template and Instructions are available for downloading from the CDA website at:
http://www.aging.ca.gov/ProgramsProviders/AAA/Fiscal_Form_Documents/
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Lora Connolly
Director