SANTA CRUZ COUNTY HMIS CALAIM WORKFLOW

Last Updated: April 2025

1. INTRODUCTION AND OVERVIEW

1.1 CalAIM in HMIS

California Advancing and Innovating Medi-Cal (CalAIM) is a transformation of Medi-Cal services to create a more coordinated, person-centered, and equitable health system. Through CalAIM, Santa Cruz County housing and homeless service providers can contract with Managed Care Plans (MCPs) to obtain reimbursement for costs associated with providing Enhanced Care Management (ECM) and Community Supports to people at risk of or experiencing homelessness.[1]

Contracted CalAIM providers must document, track, and use CalAIM authorization and services information for invoicing and reporting to MCPs. Providers authorized to provide ECM services must meet additional documentation and case plan requirements.

Many homeless and housing services providers in Santa Cruz County are required to use the Homeless Management Information System (HMIS) to track client demographics and the provision of housing and related services. To assist local contracted CalAIM providers streamline the documentation and invoicing of CalAIM ECM and Community Supports, Santa Cruz County's Housing for Health Partnership (H4HP), the countywide homeless Continuum of Care (CoC), developed a workflow for utilizing HMIS to track CalAIM authorization and services information and developed a customized CalAIM invoicing report. The customized CalAIM invoicing report requires information on client CalAIM authorizations and the provision of related services to be entered into HMIS. The information entered in HMIS can be exported through HMIS and used for invoicing to MCPs.

This training guide provides a detailed overview and step-by-step guidance on entering data in HMIS for tracking CalAIM authorizations and services and generating reports for invoicing. Appendix A provides a check-list for setting up CalAIM services in HMIS for your agency and Appendix B provides a summary step by step of this workflow.

1.2 Limitations of using HMIS for CalAIM data entry, reporting, and invoicing

HMIS is designed to capture data on client demographics and the provision of housing and services to individuals and families experiencing or at risk of homelessness. The HMIS vendor in Santa Cruz County is Clarity, developed and managed by Bitfocus. While HMIS can be customized to fit the need of each Continuum of Care, the system was designed to meet federally mandated data requirements and may not have the flexibility to capture CalAIM invoicing and reporting data as seamlessly as other data systems.

Bitfocus and H4HP coordinated to create a workflow that maximizes the collection of CalAIM billing information in HMIS within the system's limitations. In some instances, the workflow

[1] To learn more about CalAIM services, visit https://calaim.dhcs.ca.gov/

requires workarounds to collect and report on required information; the HMIS workarounds are highlighted in this guide.

1.3 Privacy and Security

CalAIM providers are responsible for maintaining the privacy and confidentiality of client information as specified by H4HP's HMIS Privacy and Security policies and in contracts with MCPs.

Some data collected for CalAIM authorizations is considered Protected Health Information (PHI). To maintain the confidentiality of clients' PHI, certain CalAIM authorization fields in HMIS are only visible to designated CalAIM contracted provider staff, including:

- Medical Record Number
- Authorization Number
- Homeless Indicators Codes (Z Codes)
- Other Medical Diagnosis Codes associated with the CalAIM authorization

CalAIM providers must specify which staff can access the sensitive data fields.

2. DOCUMENTING CALAIM AUTHORIZATIONS

2.1 Entering Authorization Information

An assessment was created in HMIS to capture clients' CalAIM authorization information as required by the MCP's invoicing process. When a provider determines a client is likely eligible for CalAIM services, they submit an authorization request to the MCP. The MCP responds to the provider's request outside of HMIS, with the client's CalAIM authorization information and related communication. To use HMIS and the customized CalAIM invoicing report for services provided, service providers must document clients' CalAIM authorization information in the applicable CalAIM Authorization Assessment. CalAIM authorization information which is necessary to populate CalAIM invoicing report includes the following:

- Managed Care Provider
- Client Member ID
- Authorization Number
- Authorization Date
- Authorization Expiration Date
- Homeless and other Indicator Codes (Z Codes)

The authorization assessment should be completed in HMIS as soon as the client is authorized for CalAIM services. To complete a CalAIM Authorization Assessment follow the step-by-step instructions below.

Step 1: Locate the appropriate CalAIM Authorization Assessment

From the client's HMIS profile, navigate to the global "Assessments" tab. Under the "Assessments" section, a list of all CalAIM Authorization Assessments will appear. Each type of CalAIM Community Support has its own authorization assessment. CalAIM ECM has a singular authorization assessment. Complete an authorization assessment for each CalAIM service type that the client is authorized for. Select the appropriate assessment and click "Start".

Important Notes

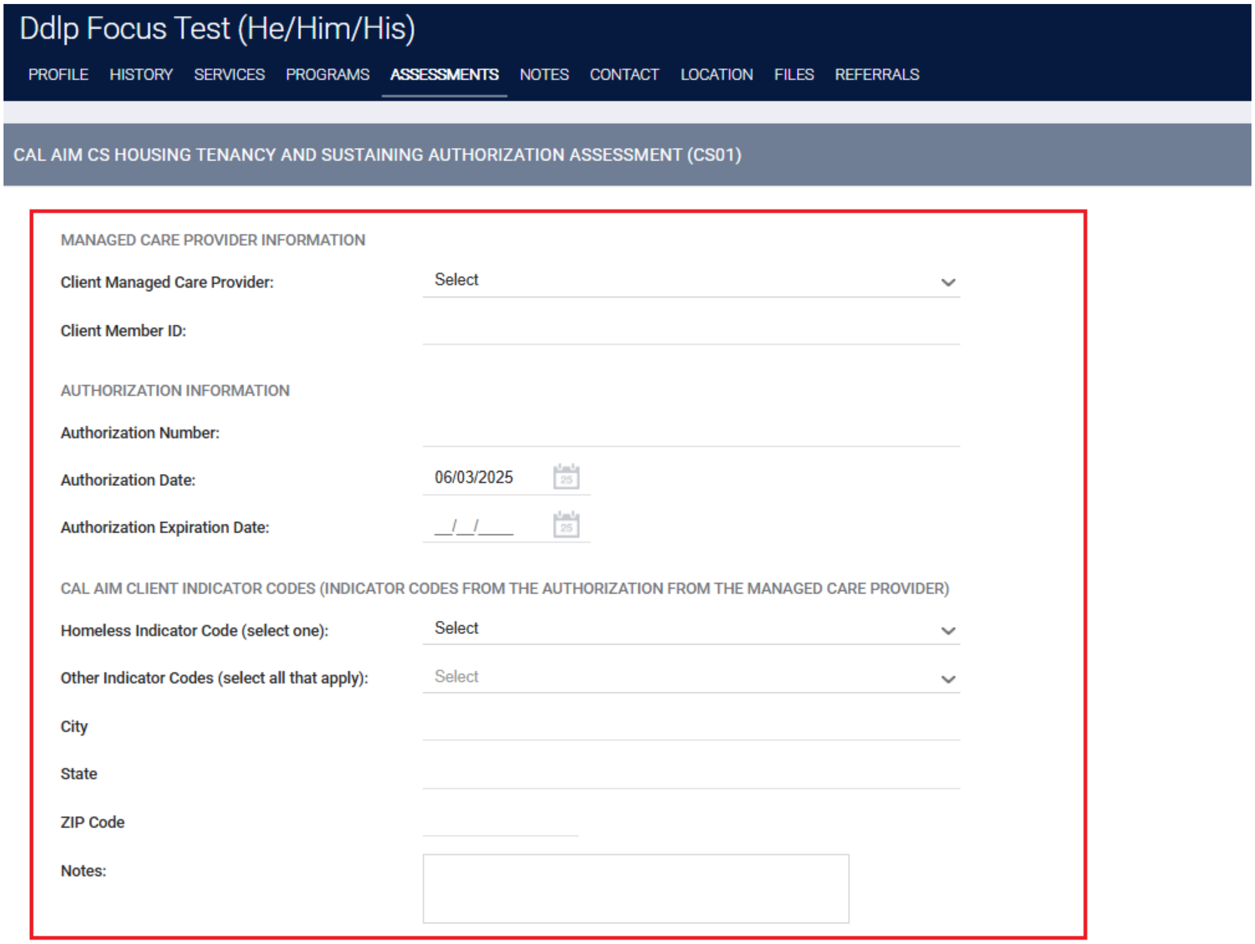
Selecting the wrong assessment may prevent the correct client services to link to the correct authorization information resulting in an inaccurate or incomplete invoice report.

CalAIM authorization assessments are collected at the global level, unlike other housing programs' assessments. This allows CalAIM authorization information to be linked to a client and not a specific housing program enrollment. If a client switches housing programs, the CalAIM authorization information does not need to be re-documented in HMIS.

Step 2: Complete the CalAIM Authorization Assessment

Complete all fields in the CalAIM Authorization Assessment.

a. Select the Managed Care Provider who authorized the client for CalAIM services from the dropdown menu.
b. Enter the Client Member ID: This is the client's Medi-Cal ID number.
c. Enter the Authorization Number: This is the number provided by the MCP which authorizes the client for CalAIM Services.
d. Enter the Authorization Date: This is the date that the client can begin receiving billable CalAIM services. The authorization date will be used to verify that all services in the invoicing report fall within the authorization window.
e. Enter the Authorization Expiration Date: This is the date that the client's current authorization will expire. This date is used to verify that all services in the invoicing report fall within the authorization window.
f. Enter the Homeless Indicator Code for the participant. This code corresponds to the homeless/housing status Z code submitted to the MCP at the time of the authorization request.
g. Based on whether the Z code you provide indicates the client is homeless or housed, you will be asked to provide their address and/or City, State, and Zip Code.
    i. For housed clients, enter the Client Address, City, State, and Zip Code.
    ii. For any client that is experiencing homelessness, enter just the City, State, and Zip Code. If the client moves from city to city, enter the city and zip code where they most commonly reside.
h. Enter Other Indicator Codes: Select all other indicator codes included in the client's authorization request. Note: If an indicator code is missing from the dropdown, please contact your HMIS Administrator to submit a change request to Bitfocus.
i. <u>For Housing Deposit Assessments Only</u>: Enter the number of household members authorized for Housing Deposits and whether the Housing Deposits were billed to the Managed Care Provider.



Once all the authorization information has been entered, click "Save".

2.2 Updating Authorization Information

Anytime there are updates to a client's authorization information, the information should be updated in HMIS. Depending on the type of update, you may need to edit the existing Authorization Assessment or you will need to submit a new Authorization Assessment (see examples below). There are two common instances when authorization information may change:

(1) The client's authorization ends **prior to** the authorization expiration date
   - A client may lose their CalAIM eligibility or authorization prior to the initial authorization end date. If this happens, update the "Authorization Expiration Date" field in the **existing**, most recent Authorization Assessment to the new end date for that CalAIM service type.

(2) The client's authorization has expired or will be expiring **soon,** and an extension has been approved

    - If a client still needs CalAIM services but their initial authorization has expired or is about to expire, the service provider will submit a re-authorization request to the MCP. If approved, a new authorization for services will be provided. Enter the new authorization information in a **new** Authorization Assessment. Do not update the original assessment. Instead, follow the steps in section 2.1 "Entering Authorization Information".

Important Notes

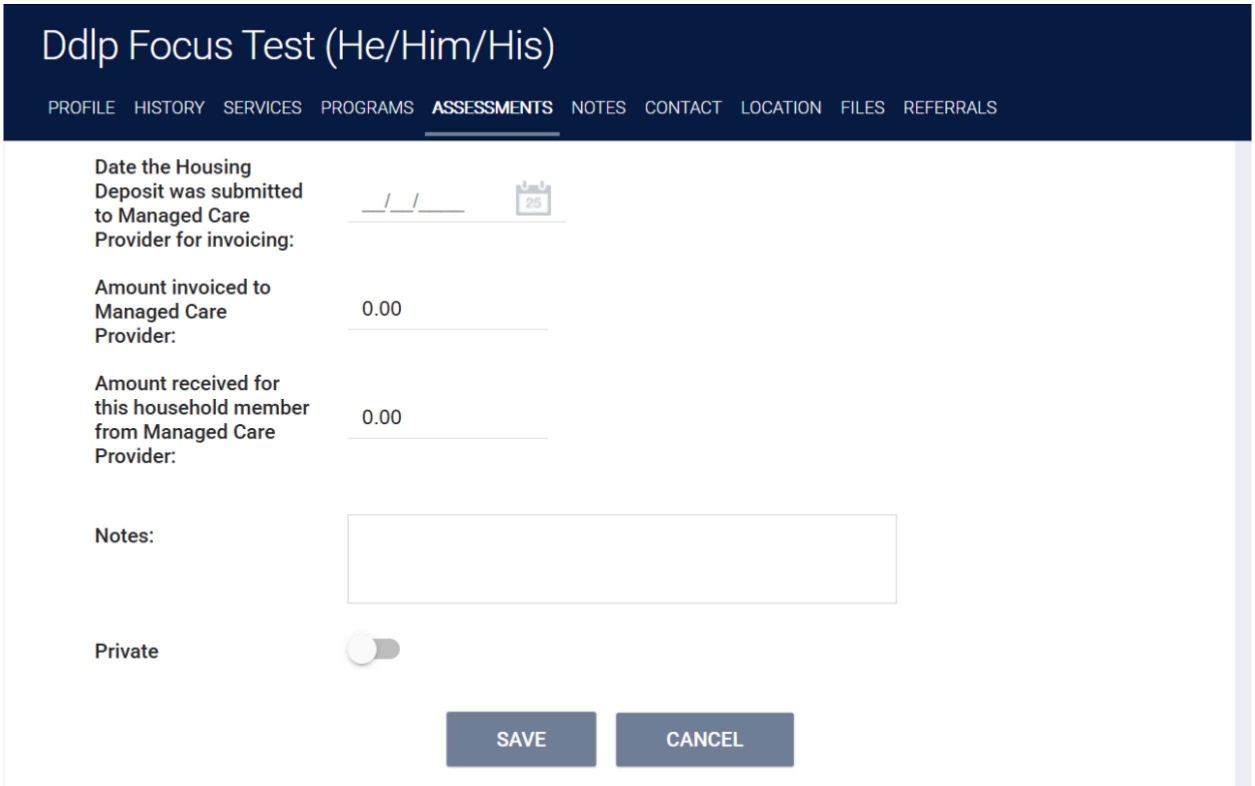
If a client requires a new authorization assessment, information from the most recent authorization assessment may auto-populate in new assessments. Review all fields for accuracy before saving new assessments.

2.3 Updating Housing Deposits Assessment After Invoice

Once a client's Housing Deposit expenses have been invoiced to the MCP, the same CalAIM CS Housing Deposit Authorization Assessment used to document the authorization information must be updated. This allows the tracking of the clients who have used their Housing Deposit benefit and supports cross-agency information sharing. To update, navigate to the existing Housing Deposit Authorization Assessment and:

- Update the "Was client's Housing Deposits billed to Managed Care Provider?" to "Yes"
- Enter the date the housing deposit was submitted for invoicing
- Enter the amount that was invoiced

Once the MCP has paid the invoice, update the last field with the amount that was received for the household for Housing Deposits.



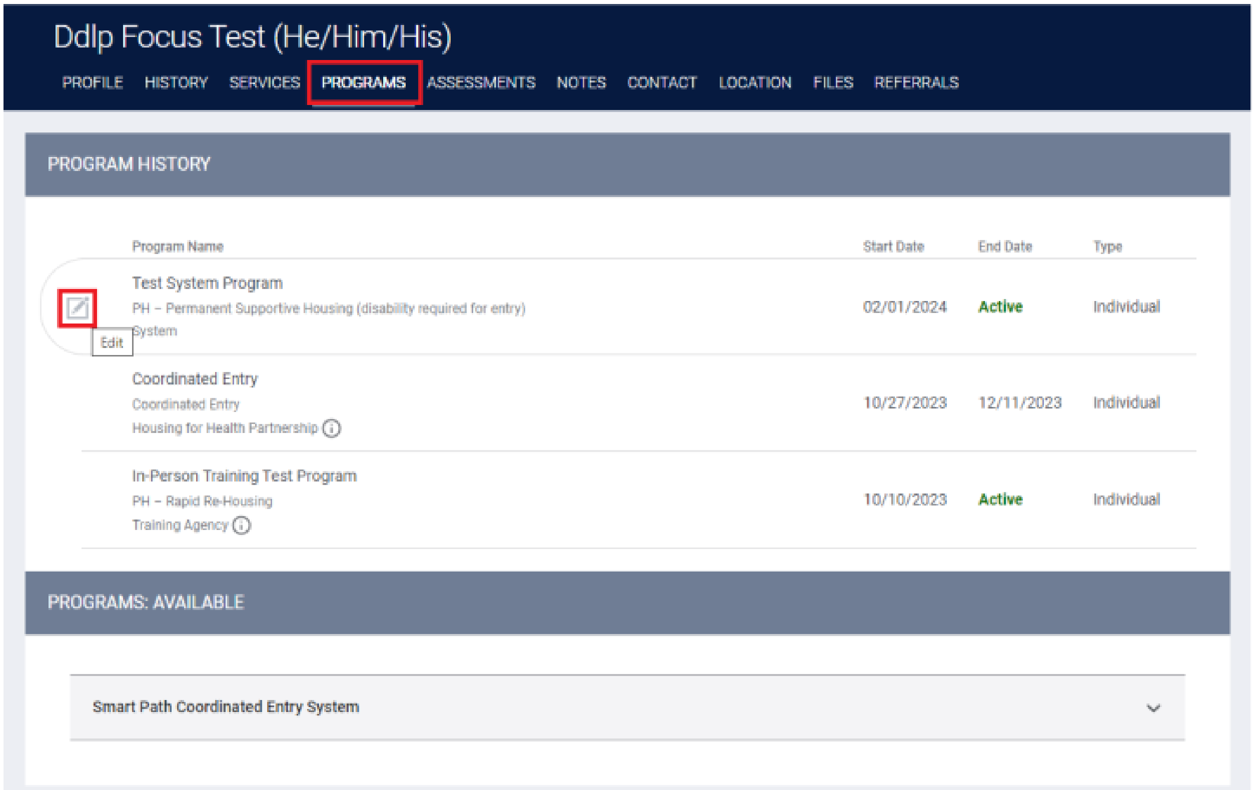
3. DOCUMENTING CALAIM SERVICES

CalAIM services must be documented in HMIS for them to appear in the CalAIM Invoicing Report.

Customizations to collect information through the Services module in Clarity are limited. H4HP and Bitfocus established a workaround to collect the necessary services information for CalAIM billing and reporting, using the fields available in the Services module. Please pay close attention to the nuances highlighted below when entering Services information in HMIS. To document a CalAIM service:

Step 1: Locate the appropriate service provided

From the client's HMIS profile, navigate to the "Programs" tab and locate the applicable program. Click the pencil icon next to the program name.

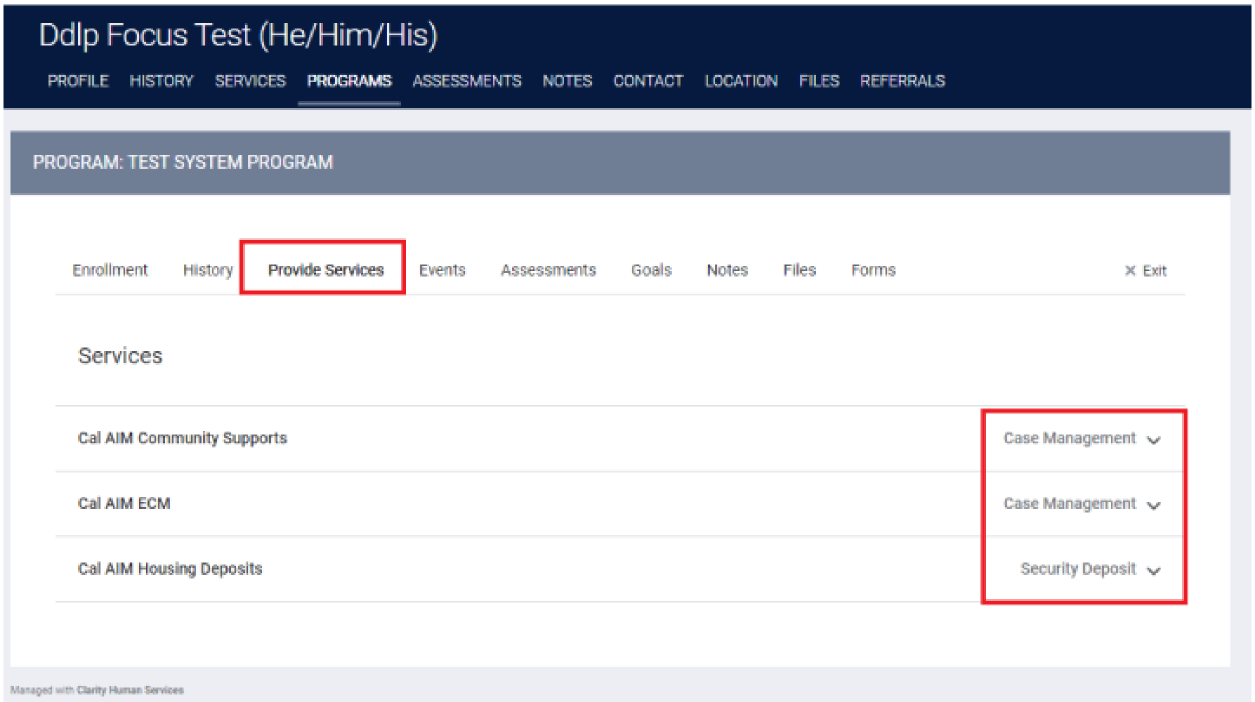


Once in the correct program, click the “Provide Services” tab. From this page, you will see up to three different CalAIM services categories based on the CalAIM services your agency provides and your agency’s CalAIM HMIS set up. These service categories include:

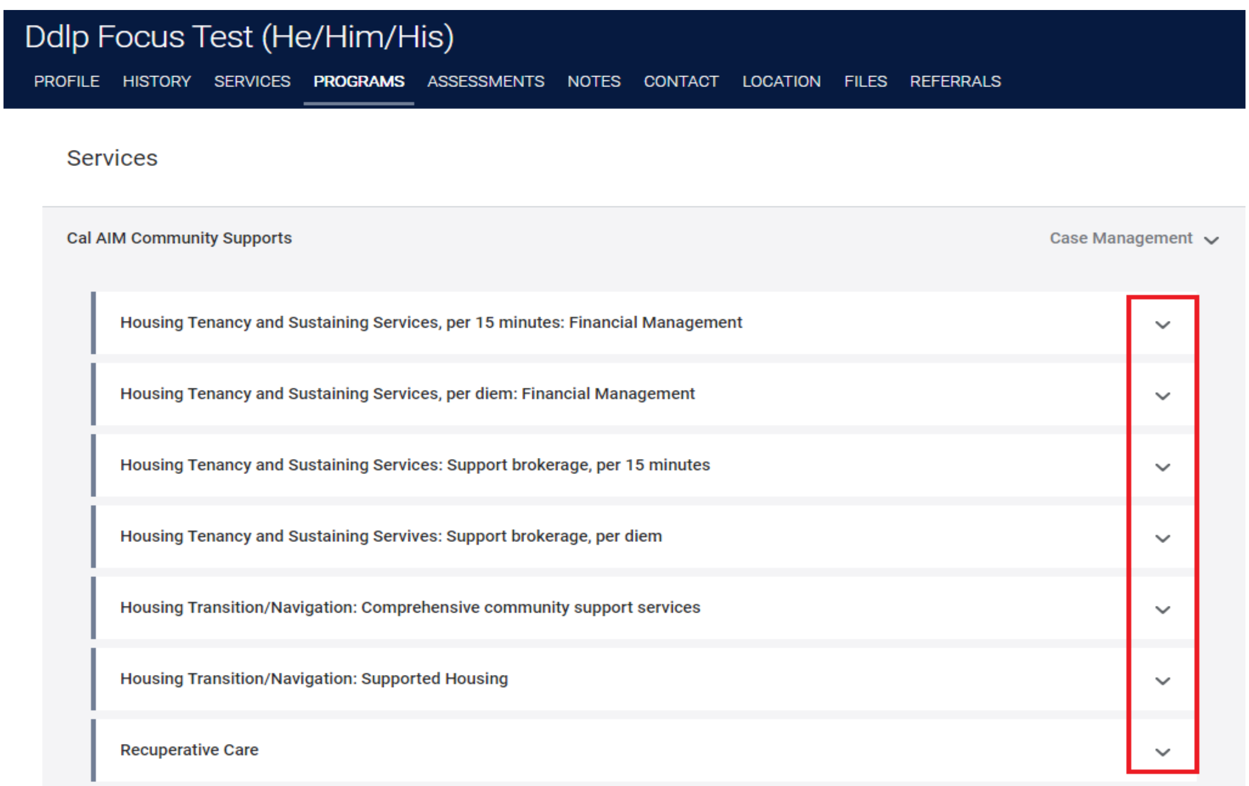
- CalAIM Community Supports
- CalAIM ECM
- CalAIM Housing Deposits

Although Housing Deposits is a CalAIM Community Support, it has its own services category to allow for tracking applicable client costs.

Click the expand arrow next to the category of services you would like to see.



A list of CalAIM services will appear. Select the CalAIM service that aligns with the service provided. Click the expand arrow next to the correct service.

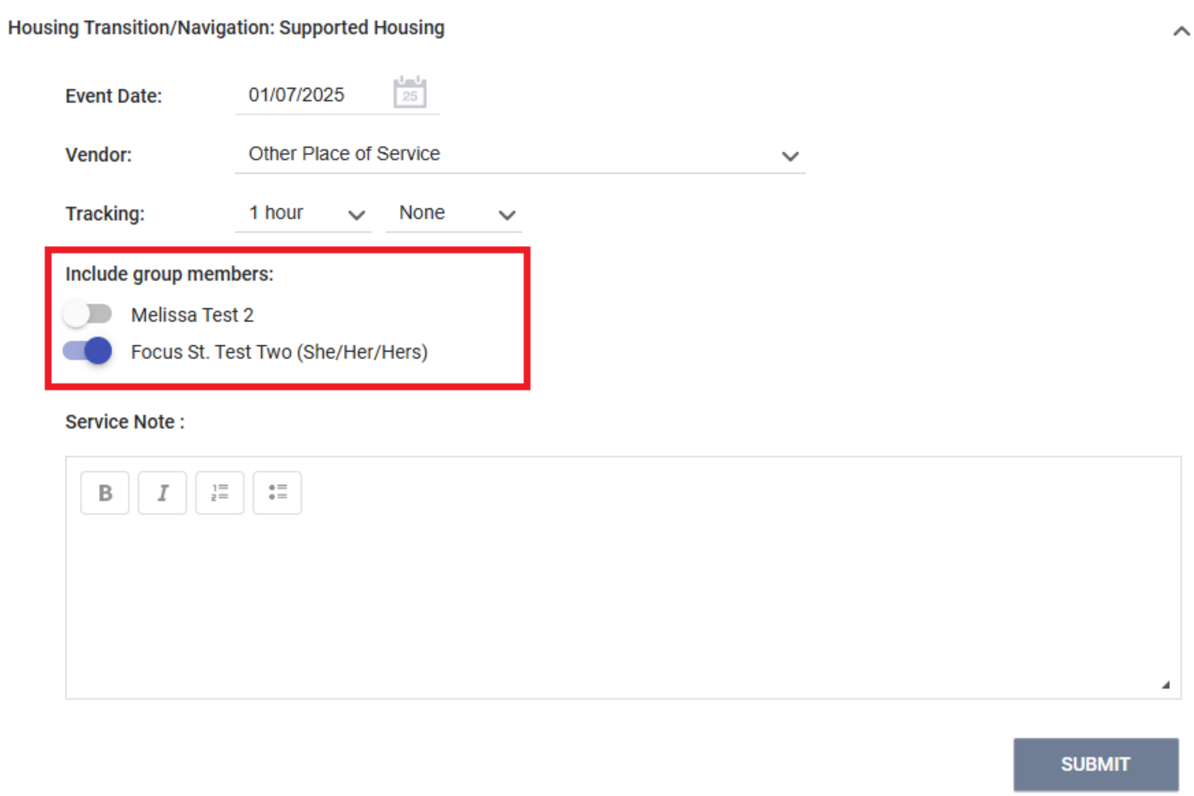


Important Notes

Please note that some services may seem similar but reflect slightly different service options. For example, if you provided Housing Tenancy and Sustaining Services, Financial Management, you will see an option for a service that is billed in 15-minute intervals and a different option that is billed per diem. For questions about which service to select, please contact your agency's CalAIM team.

Step 2: Select the CalAIM authorized household members who received the service

When selecting a non-Housing Deposits service, you will have the option to select additional household members who received the service. If you intend to bill the same service for multiple authorized household members, click the toggle next to their names to select those who received the service.



The toggle will link the service to selected household members' HMIS profiles and pull the service information into the CalAIM Invoicing Report for each selected household member with the applicable authorization. Only select household members with a current CalAIM authorization for that type of service.

Housing Deposit services will not allow you to select additional household members. This is so the expense is not duplicated for each household member in the invoicing report.

Important Notes

If you toggle the service for household members who do not have a CalAIM authorization documented in HMIS, it will appear as an error in the CalAIM data quality report and the service will not appear in the CalAIM invoicing report.

Step 3: Enter in the service details

Enter the services information as follows:

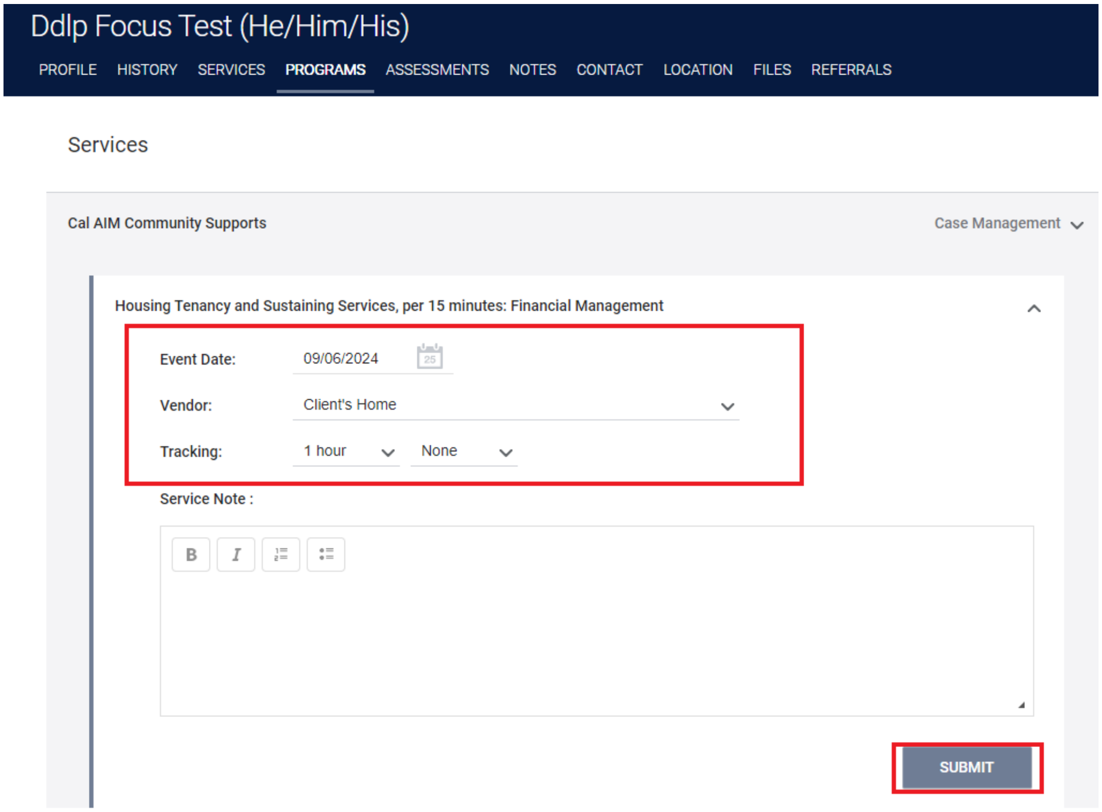
a. The Event Date should reflect the date that the service was provided.
b. **The Vendor field is used as a workaround for collecting the "Place of Service".** Select the correct "Place of Service" from the Vendor field dropdown. If you do not see the appropriate place of service listed in the Vendor field, please contact your HMIS lead to submit a request to Bitfocus to update the dropdown list.
c. Enter the amount of time spent providing the service. Round the time to the nearest 15-minute increment in adherence with the "Rule of Eight."

Rule of Eight

- 0-7 minutes – Not Reportable
- 8-22 minutes – Equals 1 Unit (enter 15 minutes)
- 23-37 minutes – Equals 2 units (enter 30 minutes)
- 38-52 minutes – Equals 3 units (enter 45 minutes)
- 52–67 minutes – Equals 4 units (enter 1 hour)

d. For Housing Deposits only: Instead of the "Time" field, the service includes an "Expense Amount" field. Enter the amount of the Housing Deposit related expense that will be submitted for reimbursement.

Once done, click "Submit".



4. COORDINATED ENTRY (CE) & CALAIM CONNECTOR SERVICES PROGRAM ENROLLMENTS

For CE providers, connector services are often eligible for CalAIM reimbursement. However, given that CE data entry includes events rather than services, a unique workflow is required to document connector services that are billable to MCPs. If a client is enrolled in any other non-CE program in HMIS, the provider should document CalAIM services provided to the client through their respective program. Examples of non-CE HMIS enrollments include programs like Shelter and Street Outreach.

Alternatively, if a client is not enrolled in any other program in HMIS aside from CE, the client should be enrolled in the CalAIM Connector Services Program. CalAIM services should be captured through this program enrollment.

Important Note

The CalAIM Connector Services program enrollment screen contains the minimum program data requirements allowed by Clarity HMIS to help reduce administrative burden on providers. This means it has very few data fields and looks different than other HMIS program enrollments. For providers needing access to the CalAIM specific Coordinated Entry enrollment, communicate with your HMIS lead for set up.

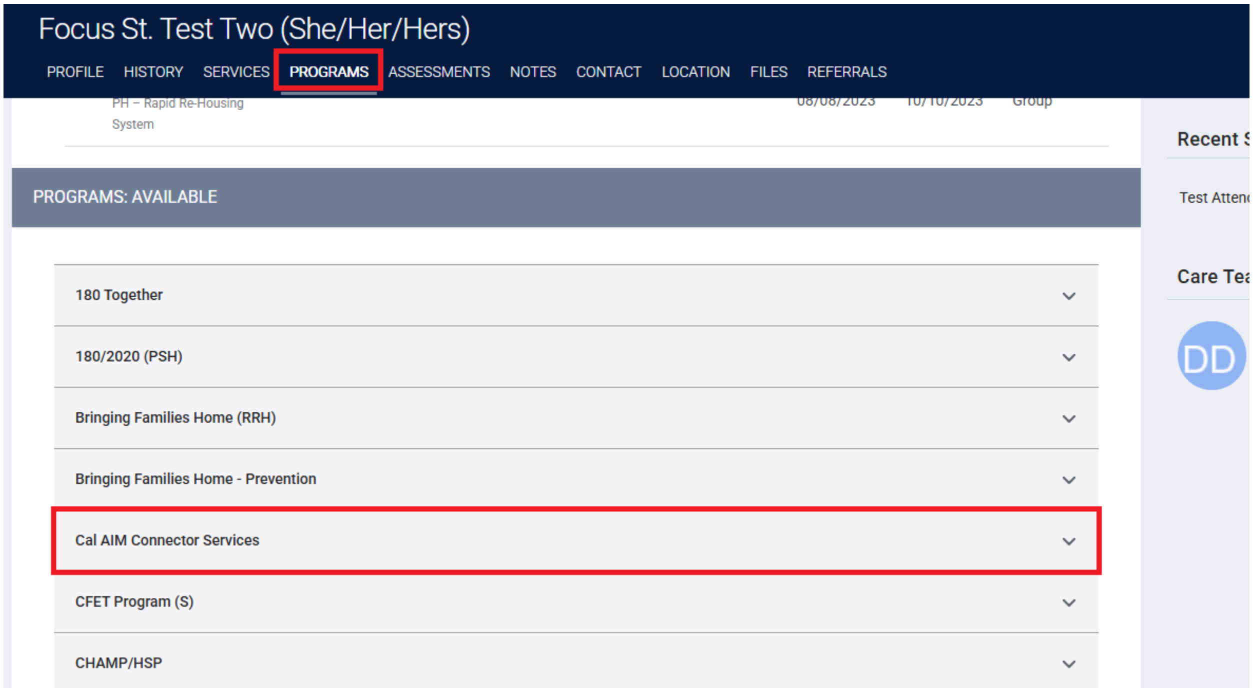
The following details the workflow for when the additional program enrollment is needed. To complete this workflow in HMIS:

Step 1: Confirm the client has a CE enrollment in HMIS and has completed the CE workflow

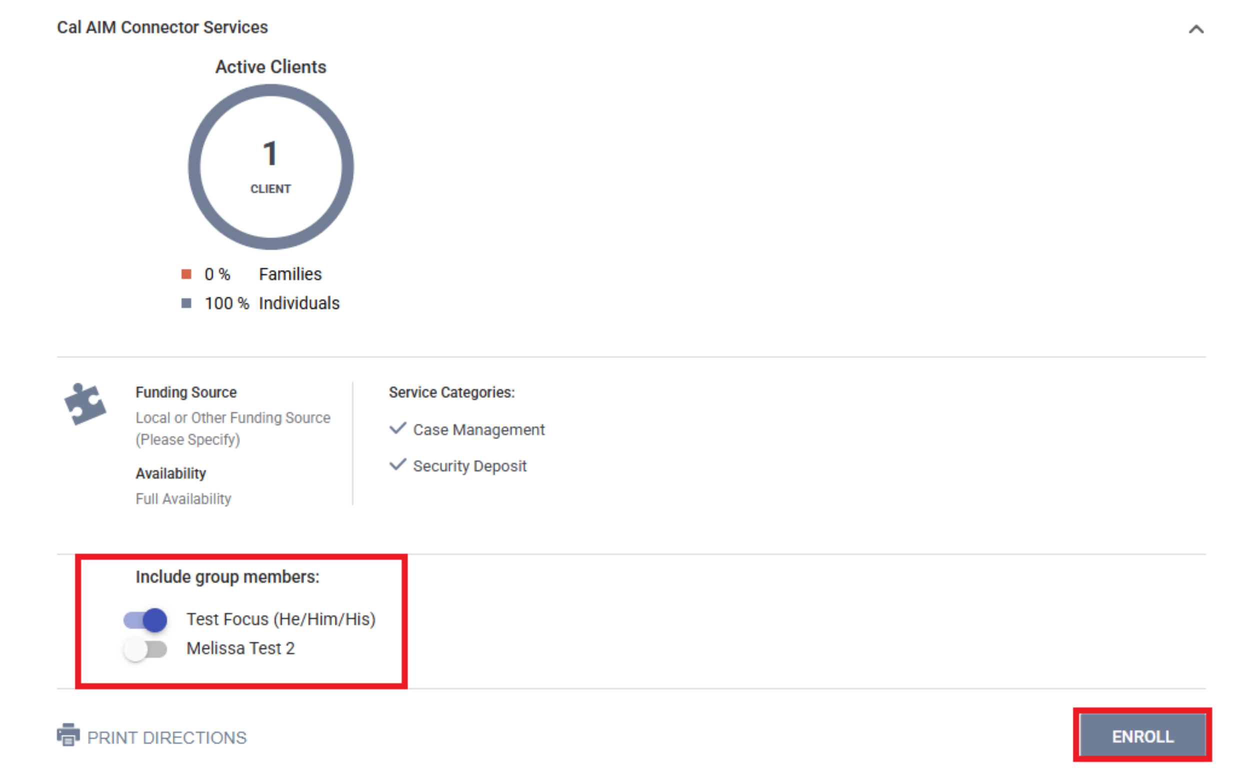
The CE provider needs to follow the standard HMIS CE workflow (HMIS profile creation, CE program enrollment, Housing Needs Assessment - HNA, Housing Action Plan - HAP, CE event, and Status Updates) as delineated in the CE Policies and Procedures, prior to any of the data entry steps for CalAIM.

Step 2: Enroll the client in the CalAIM Connector Services Program

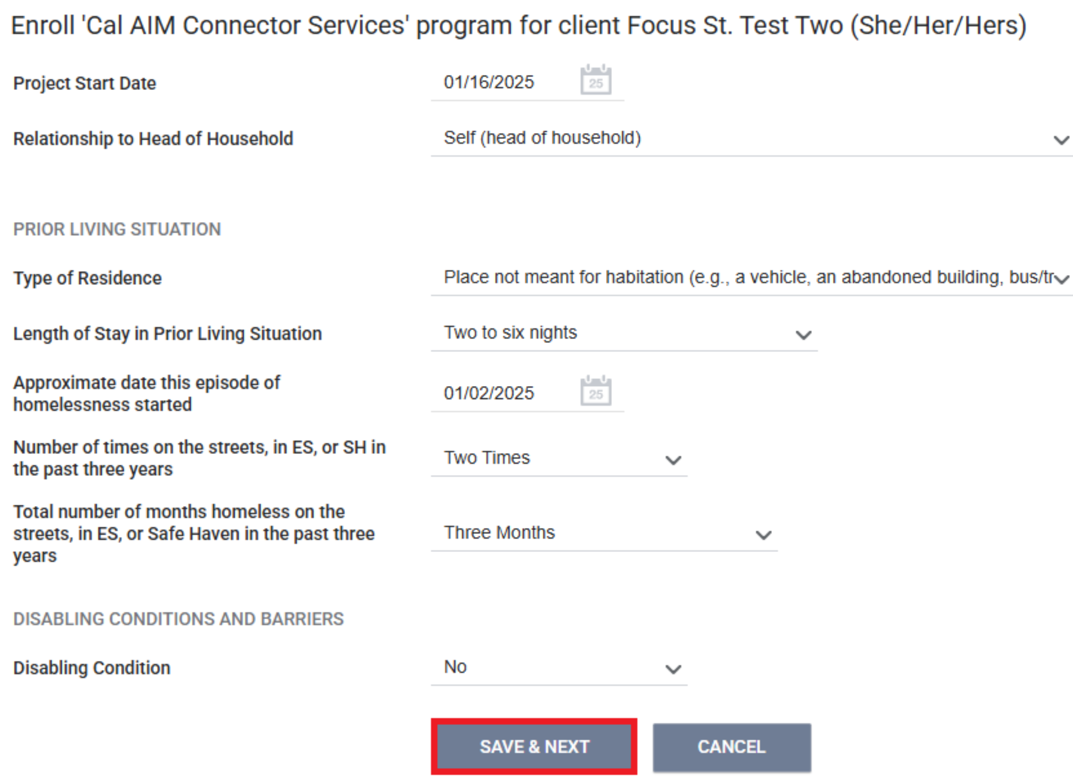
If a client has been authorized for CalAIM services and is not enrolled in a non-CE program in HMIS (i.e. client's only active program is "Coordinated Entry"), enroll the client in the "CalAIM Connector Services" program linked to your agency. To enroll a client, navigate to the client's profile, select the "Programs" tab, and locate the CalAIM Connector Services from the "Programs: Available" Section. Click the expand arrow.



From the "Include group members" section, toggle on all household members authorized for CalAIM services. Toggled members will be included in the program enrollment. Do not toggle any household members for whom you are unable to bill CalAIM services. Click Enroll.



Complete the program enrollment for the head of household by answering all questions. Once done, click "Save and Exit" if a single person household. Click "Save and Next" if you are enrolling multiple household member. Repeat by completing the enrollment questions and save for each additional member.



Step 3: Add CalAIM authorizations and CalAIM services to HMIS as applicable

CE providers should follow the CalAIM Authorization Assessment workflow and CalAIM Services workflow outlined in the respective sections of this document to capture information on clients enrolled in the CalAIM Connector Services Program.

CE providers will need to switch from the Coordinated Entry Agency back to their Home Agency in HMIS to enter client services linked to their agency's CalAIM Connector Services program.

Important Note

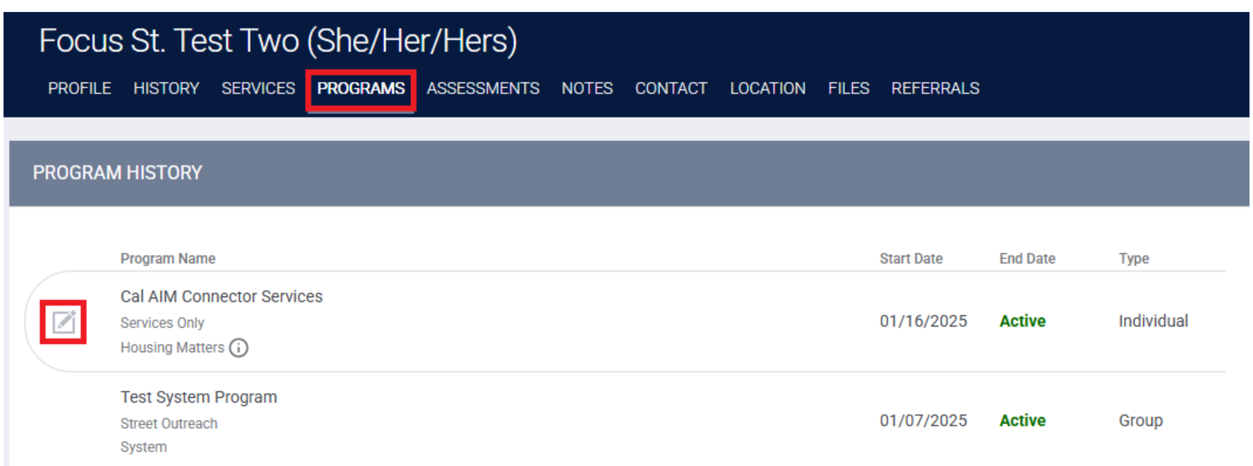
Entering CalAIM services in HMIS CalAIM Connector Services Program replaces the steps in the current CE data entry workflow. Providers with clients dual enrolled in CES and a CalAIM Connector Services program only need to enter services and quarterly reports in the CalAIM program; they do not need to enter CE events nor complete quarterly reports in the CES program. Staff should follow the [dual enrollment matrix] for tracking CE events in addition to documenting CalAIM authorizations and services for billing. For the purposes of maximizing programming funding, it is **most important** that Connector staff enter the CalAIM authorization assessments and services for reimbursement. Without these data entry steps, the provider will not be able to bill using HMIS data.

Step 4: Exiting Clients from the CalAIM Connector Services Program

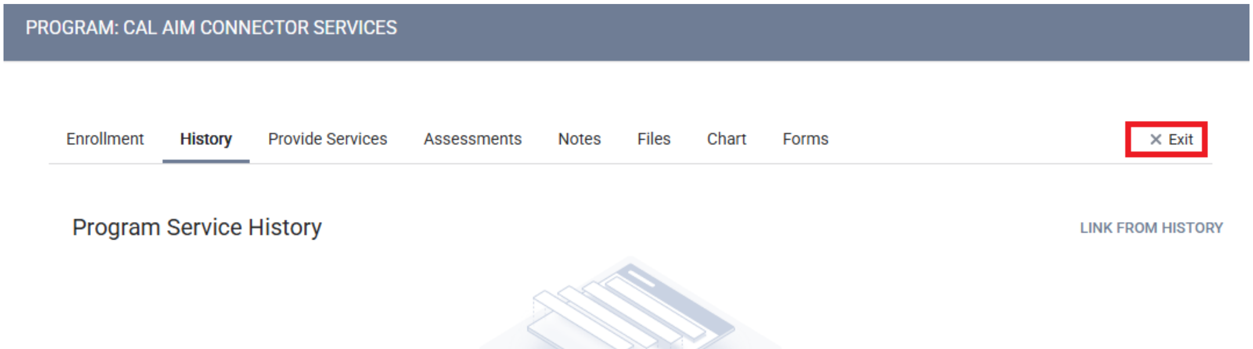
Exit the participant from the CalAIM Connector Services program if:

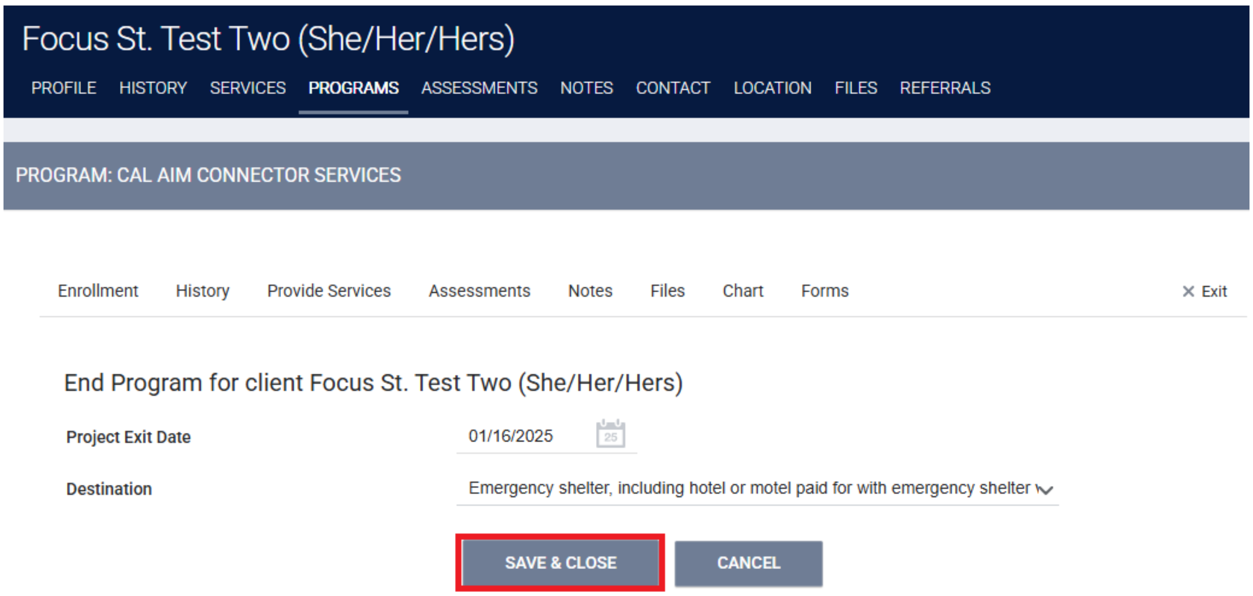
- The client is enrolled in a housing program. At this point, CalAIM services should be recorded in the HMIS housing program the client is enrolled in *or*,
- The client's CalAIM authorizations end, meaning you can no longer bill for CalAIM services *or*,
- The client has been exited from the Coordinated Entry program and is no longer receiving services through the homelessness response system.

To exit a client from the CalAIM Connector Services program navigate to the "Programs" tab from the client's profile and click the pencil icon next to the CalAIM Connector Services program.



Click the "Exit" tab.





Enter the date the client is exiting from the program, review and respond to all fields in the exit screen and click "Save & Close". If multiple household members are enrolled, be sure to exit all persons in the household.

Clients who have no CalAIM services documented in HMIS for over 120 days will be automatically exited from the applicable CalAIM Connector Services program by the system.

5. USING HMIS REPORT FOR INVOICING

CalAIM data entered in HMIS using the above workflow can be used for invoicing the MCP for eligible services provided. The following CalAIM reports are available in HMIS to help with invoicing:

CalAIM Data Invoicing and Monitoring Reports: These reports only include ECM, Housing Navigation, and Tenancy and Sustaining services.

- <u>CalAIM Data Quality Flags:</u> This report provides potential data entry errors and can be used to verify that all entered CalAIM information is correct before downloading the CalAIM Invoicing Report.
- <u>CalAIM Invoicing Report:</u> This report was developed to align with the excel invoicing template required by the MCPs and the Department of Health Care Services (DHSC) invoicing requirements. This report pulls in information from CalAIM services documented in HMIS and matches it with information in the most recent CalAIM Authorization Assessment of that service type.
- <u>Authorization Assessment Review:</u> This report provides a summary of how many authorizations and services a client has in HMIS. This report is for information only; no action is needed for this report.

CalAIM Invoicing Report – Housing Deposits: These reports include information related to CalAIM Housing Deposits authorizations and services.

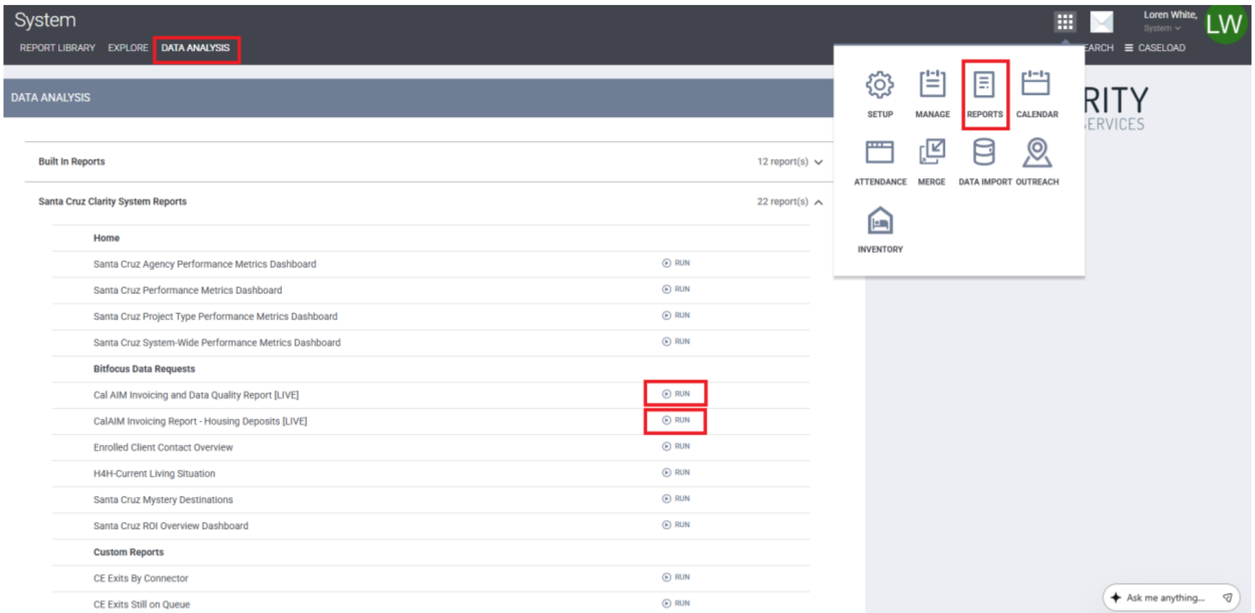
- <u>CalAIM Invoicing Report – Housing Deposits:</u> This report was developed to align with the excel invoicing template required by the MCPs and the Department of Health Care Services (DHSC) invoicing requirements. This report pulls information from Housing Deposit services, combines it into a single row per client, and matches the information to the client's Housing Deposit Authorization information. Although this report mirrors the CalAIM Invoicing Report, it is a separate report to allow for invoicing of Housing Deposit services when all Housing Deposit expenses have been accrued and is appropriate for the client.
- CalAIM Housing Deposits Services Detail: This report provides information about each unique Housing Deposit service and a countdown until the Housing Deposit Authorization expires.

6.1 Accessing CalAIM Reports

Only HMIS users with a manager license can access the CalAIM reports in HMIS. If you do not have access, your HMIS lead should have access. For any questions about access to the reports, please contact your agency's HMIS lead.

Step 1: Run CalAIM Reports in Clarity's Data Analysis Tab

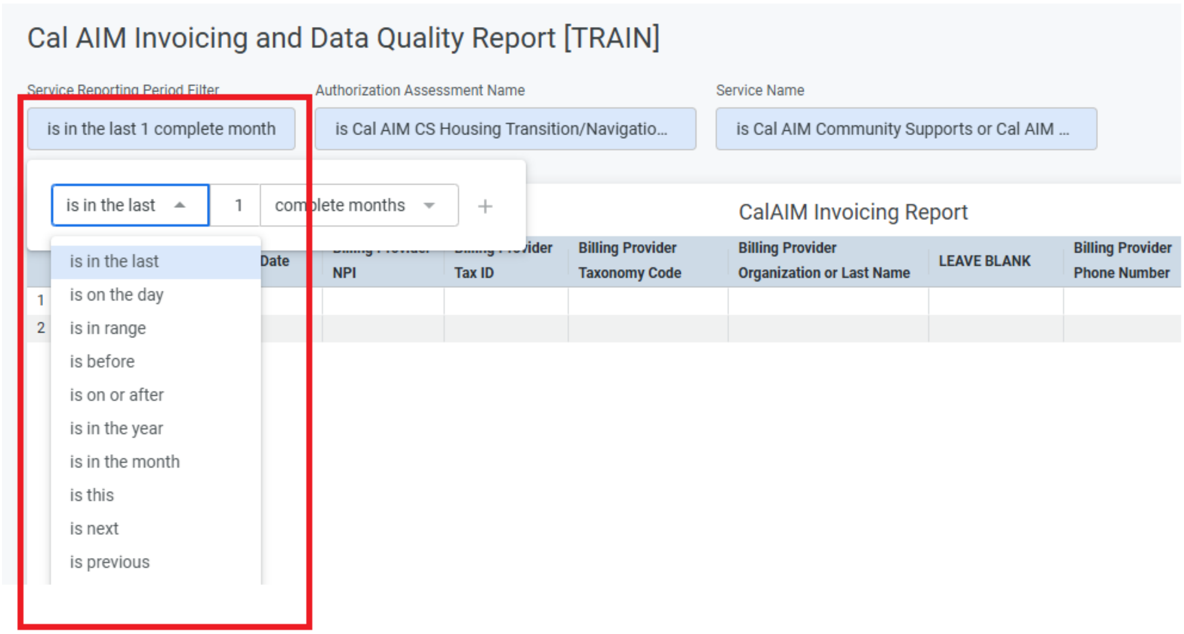
To access the CalAIM reports, from the HMIS home page, click the application launcher icon to the left of the mail icon and select "Reports". From the Reports page, click the "Data Analysis" tab. Locate the "CalAIM Invoicing and Data Quality Report" or "CalAIM Invoicing Report – Housing Deposits" under the Santa Cruz Clarity System Reports section and click "Run".



Step 2: Confirm report filters are accurate

The CalAIM Data Invoicing and Monitoring reports will be automatically filtered to only show services documented during the last complete month. For example, if you are running the report in March 2025, only services documented for February 2025 will appear. Providers are encouraged to submit monthly invoices to MCPs.

You can select a different reporting period by clicking on the "Service Reporting Period Filter".



The CalAIM reports currently only capture client services provided under CalAIM authorizations for Community Supports Housing Tenancy and Sustaining Services and Housing Transition and Navigation Services and ECM.

The CalAIM Invoicing Report-Housing Deposits will be filtered to include services for clients who do not have a "Yes" response in the "Was client's Housing Deposits billed to Managed Care Provider?" field in the CS Housing Deposit Authorization Assessment. This means that only services for clients whose Housing Deposits have not been invoiced to the MCP will appear in this report.

5.2: Using the CalAIM Data Quality Flags Report to verify data

The CalAIM Data Quality Flags Report provides a list of services that were provided in the reporting period, but do not appear in the CalAIM Invoicing Report because of a data error. Review and correct any data errors prior to downloading the CalAIM Invoicing Report data. Errors flagged in the Data Quality Flags report include:

- Service does not align with Authorization Assessment Type. This flag occurs when the client does not have any CalAIM authorizations or the correct Authorization Assessment associated with the service provided documented in HMIS. For example, a flag would appear if the client has an ECM service documented in HMIS, but the client's only documented Authorization Assessment is for Community Supports – Housing Tenancy Authorization.

To correct this error:

- If the incorrect service was entered, delete that service from HMIS and document the correct service type corresponding to the authorization assessment.
- If the service was correct, but there is no corresponding authorization, complete the correct CalAIM Authorization Assessment in HMIS.

- Service falls outside of the most recent authorization. This flag occurs when the service date either before the authorization start date or after the authorization end date of the most recent authorization documented in HMIS of that service type. For example, a flag would appear if a service was entered on 3/15/2025, but the client's most recent authorization expiration date for that service type was 3/10/2025.

  To correct this error:

  - Verify the client's authorization information and the date the service was provided. Update the CalAIM Authorization Assessment if needed. If the client was re-authorized for services, complete a new CalAIM Authorization Assessment in HMIS.
  - If the client's CalAIM authorization expired and the client was not re-authorized for services, your agency can decide whether they would like to keep the service logged and ignore them on the Data Quality Report or delete the service and enter it as a non-CalAIM service. It is important for services to remain logged in the system for tracking and monitoring services provided to clients.

Important Note

The CalAIM Data Quality Flags Report matches services data with the most recent CalAIM Authorization Assessment of that type. If a client was re-authorized for services in the middle of the reporting period, a service may be flagged as incorrect, even if it was correctly entered.

For example, if a client is reauthorized for services starting on March 15, 2025, services with a date on or before March 14 will be flagged as a "service that falls outside of the most authorization" even though the service was provided during a prior authorization. In this case, ignore the error message and **manually enter that service into the CalAIM Invoicing Report before submitting to the MCP**.

5.3 Using the CalAIM Housing Deposits Services Details Report

For Housing Deposits, the Housing Deposits Services Details report provides a list of all Housing Deposits services for clients who have not had their Housing Deposits billed to

MCPs (as entered in their Housing Deposits Authorization Assessment). This report can be used to identify:

- The number of days left before the client's Housing Deposit Authorization expires. This report should be used to help prompt accruing all expenses before the expiration date and submitting an invoice if no more housing deposit expenses can be accrued.
- The total amount of Housing Deposits expenses. The report sums the amount of all Housing Deposits expenses, allowing the user to see how many expenses a client has accrued and when they are close to their Housing Deposit expense cap.

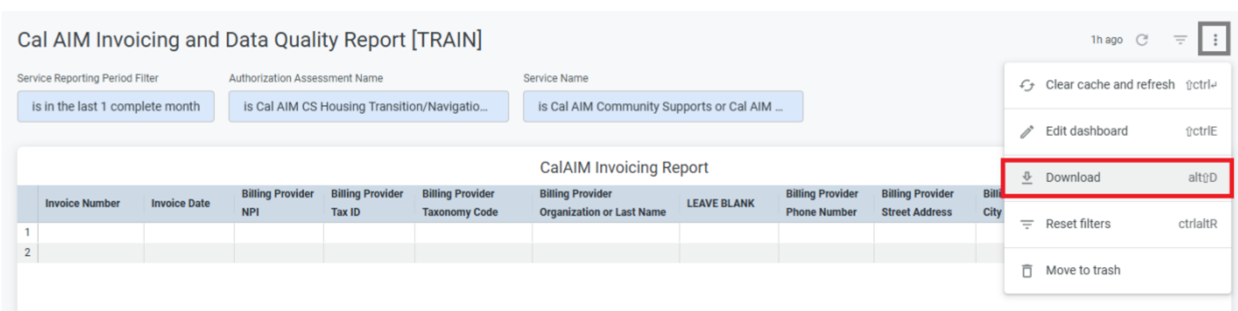
5.4 Download and Reformat CalAIM Invoicing Report

Once all data quality flags have been verified and corrected, download the CalAIM Invoicing report.

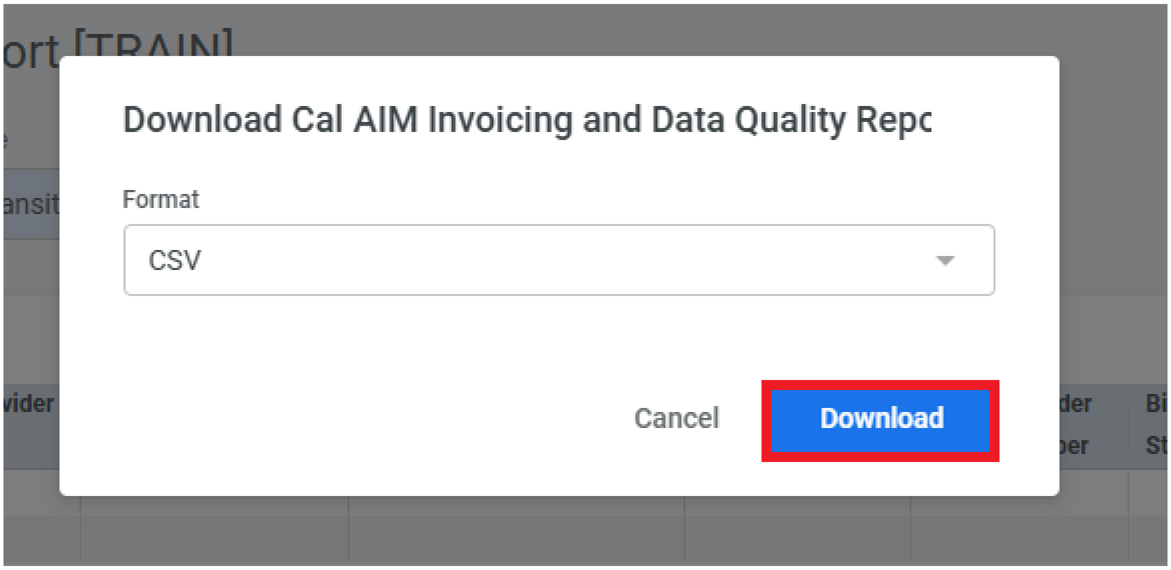
While the CalAIM Invoicing Report contains all fields MCPs expect from providers in CalAIM invoicing reports, HMIS is not set up to collect and populate all the necessary information in the report. Fields for which data is not collected in HMIS will appear as blank columns in the invoicing report. Providers will need to manually enter the applicable data in these fields after running and downloading the report before sending to the MCP. An example of data that will need to be manually added to the report by the provider includes provider billing information.

Step 1: Download the CalAIM Invoicing Report

Click the three dots on the top right side of the report and click "Download".



From the popup, leave the format as CSV and click "Download".



Step 2: Reformat CSV export to align with invoicing template

Once downloaded, it will be saved on your device. The columns in the CSV download will appear in a slightly different order than how they appear in the report in Clarity and what is required in the MCP's invoicing template.

- For the CalAIM Invoicing Report: An Excel Power Query can be used to transform the exported report to match the MCP's invoicing template. A step-by-step guide for using the Power Query to re-format the report is found in Appendix C. Alternatively, you can also manually cut and paste the columns of the downloaded report into the order of the MCP's invoicing template to submit.
- For the CalAIM Invoicing Report – Housing Deposits: The last three columns (highlighted in red in Clarity) are the only three columns that are out of order. Manually move the columns to the correct location based on the MCP Invoicing Template.

APPENDIX A: CHECKLIST FOR CALAIM HMIS PROCESS SET UP

Use this check-list to set up the CalAIM data collection process in HMIS. For any questions on the process, contact santacruz@bitfocus.com.

☐ Once your agency is in contract to provide CalAIM services, complete the HMIS CalAIM Set Up Request Form

- H4HP and Bitfocus will work to set up the HMIS training site with the CalAIM authorization and services. They may reach out to clarify questions about your responses in CalAIM Set Up Request Form.

☐ Ensure all staff members who will document CalAIM information in HMIS have HMIS access.

☐ Review and test the CalAIM data collection workflow on the training site. This will allow you to familiarize yourself with the workflow and ensure HMIS is set up correctly. Reach out to H4H or Bitfocus with any questions.

☐ Once you are ready to implement the workflow, request for the CalAIM set up on the HMIS live site.

☐ Train staff to use the new workflow. Use this training guide as a resource for staff.

☐ Select a start date for implementation.

☐ Monitor the workflow and data collection practices to ensure accuracy and consistency.

APPENDIX B: SUMMARY OF CALAIM HMIS DATA COLLECTION WORKFLOW

This document serves as a high-level summary for documenting CalAIM authorizations and services in HMIS.

Documenting Authorizations in HMIS

When a client is authorized for CalAIM services, complete a CalAIM Authorization Assessment:

1) Locate the appropriate CalAIM Authorization Assessment, found in the global "Assessments" tab in HMIS.
2) Complete the assessment. Enter the information exactly as listed in the CalAIM authorization provided by the MCP. Complete all required fields.

<u>Updating Authorization Information</u>

- If a client loses their eligibility prior to the authorization expiration date, update the **existing** CalAIM Authorization Assessment with the new expiration date.
- If a client is approved for an extension, enter the re-authorization information through a **new** CalAIM Authorization Assessment.
- If a client's Housing Deposits have been invoiced to the MCP, update the **existing** CalAIM Housing Deposits Authorization with the date and amount that was invoiced.

Documenting CalAIM Services

Once a client is authorized for CalAIM services, document any billable services in HMIS:

1) Locate the appropriate CalAIM service under the correct program enrollment. CalAIM services should be documented under the client's existing HMIS program enrollment unless the client is **only** enrolled in Coordinated Entry. If the client only has a Coordinated Entry enrollment, create a CalAIM Connector Services program enrollment and document CalAIM services under this program.
2) Select all household members authorized for CalAIM services and whose service is billable.
3) Enter the service details. Be mindful of nuances with documenting service information, such as using the Vendor field to capture "Place of Service" and documenting time in 15-minute increments using the "Rule of Eight".

Using HMIS Report for Invoicing

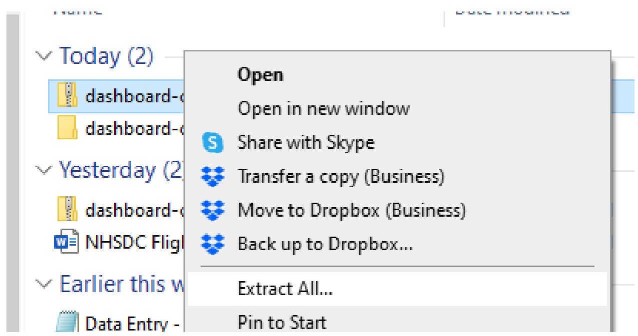
Use the HMIS reports to verify the authorization and service information is correct and to pull the information necessary to create an invoice:

1) Run the CalAIM Invoicing and Data Quality Reports and the CalAIM Invoicing Report – Housing Deposits in HMIS.
2) Use the CalAIM Data Quality Flags Report and CalAIM Housing Deposits Services Details report to verify all services and authorization information is accurate. Correct any errors that appear in this report.
3) Download the CalAIM Invoicing Report.
    a. To submit to the MCPs, manually enter information for any missing columns, such as provider information, and reformat the columns in the report by using the PowerQuery code or moving the columns manually to align with the MCPs invoicing template.

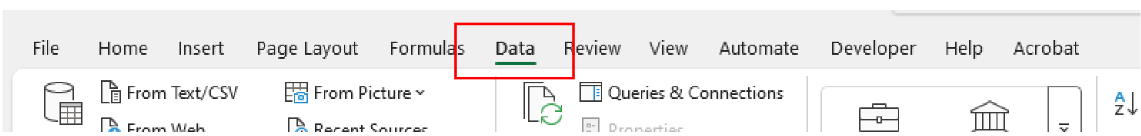
APPENDIX C: INSTRUCTIONS FOR RE-FORMATTING REPORT EXPORT USING POWER QUERY

The following instructions can also be found in the following video: [Excel Power Query Demo (with sound)]

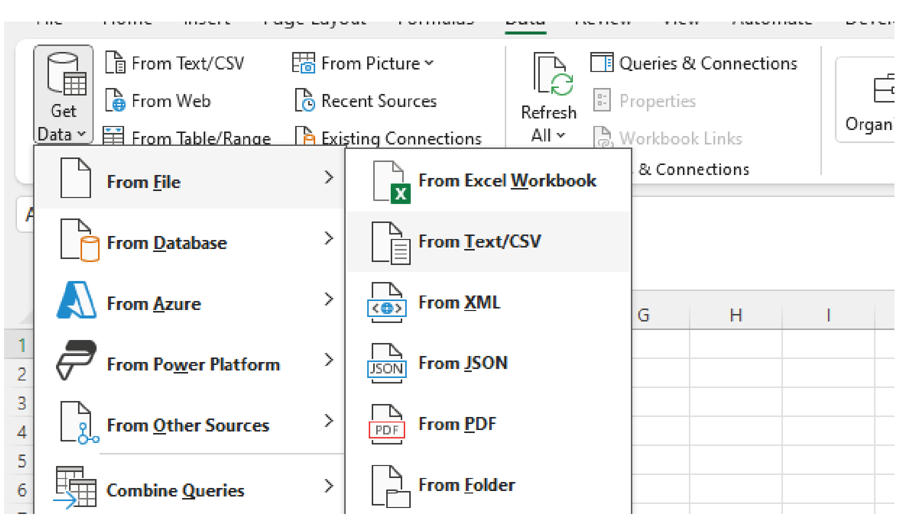
1) Download the CalAIM Invoicing Report from Clarity (this may take a few minutes)
2) Before completing the next steps, find the downloaded file. Right click and select "Extract All".



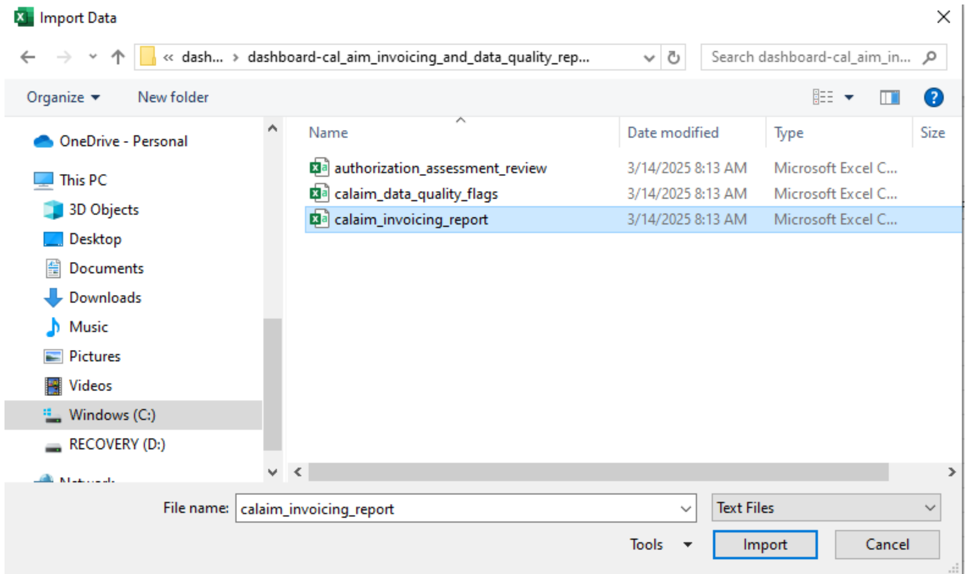
3) Open a new/blank excel sheet
4) Click "Data"



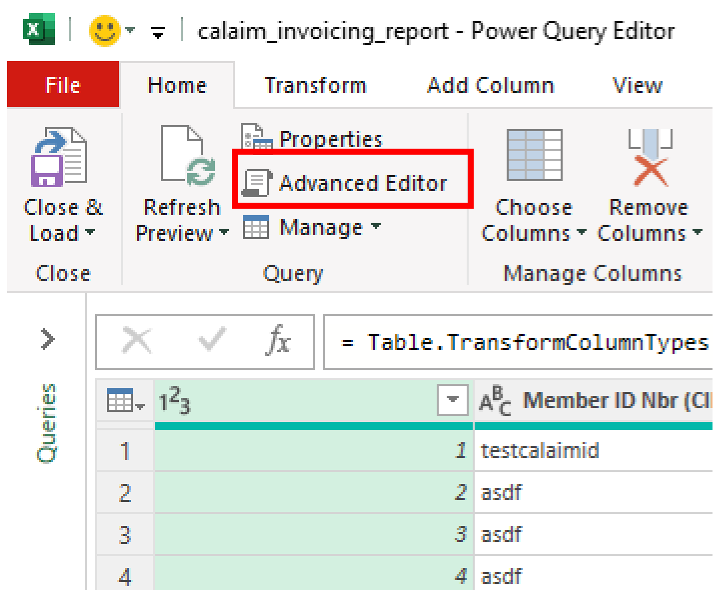
5) Click Get Data → From File → From Text/CSV



6) Locate the calaim_invoicing_report and click "Import"



7) From the pop-up click "Transform Data".
8) Click "Advanced Editor" in the Query Section



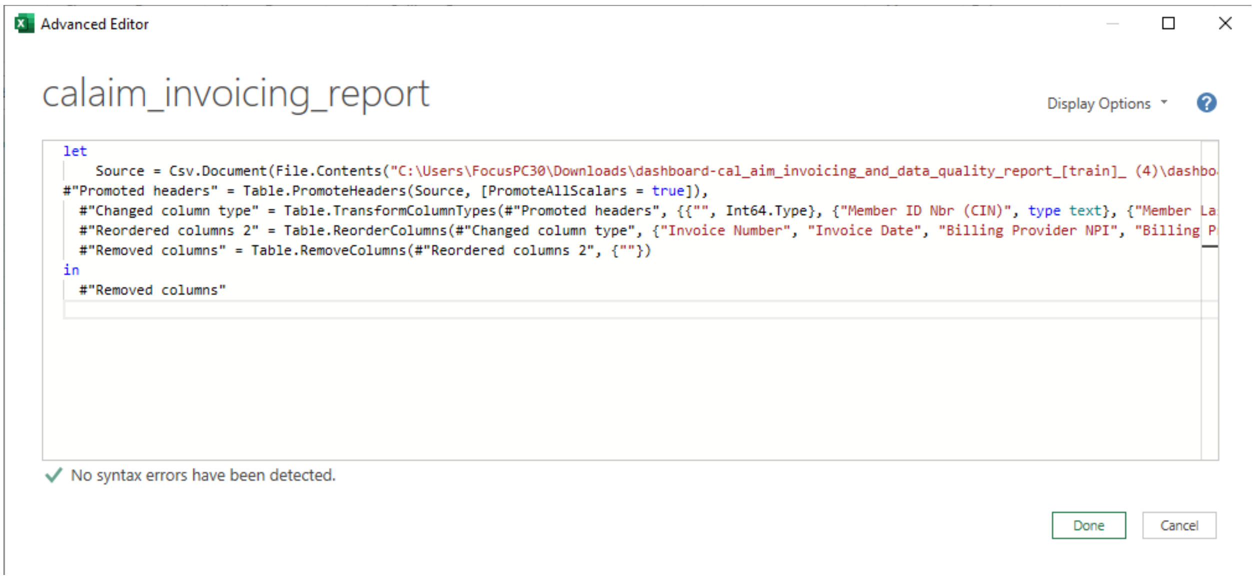
9) From the pop-up, copy and paste the code below starting on the row that reads "#"Promoted Headers". The text in the red box below will be replaced with the new code (also below).


Advanced Editor
calaim_invoicing_report
Display Options
let
Source = Csv.Document(File.Contents("C:\Users\FocusPC30\Downloads\dashboard-cal aim invoicing and data quality report [train] (4)\dashbo
#"Promoted Headers" = Table.PromoteHeaders(Source, [PromoteAllScalars=true]),
#"Changed Type" = Table.TransformColumnTypes(#"Promoted Headers",{{"", Int64.Type}, {"Member ID Nbr (CIN)", type text}, {"Member Last Nam
in
#"Changed Type"
No syntax errors have been detected.
Done
Cancel

The code you paste is:

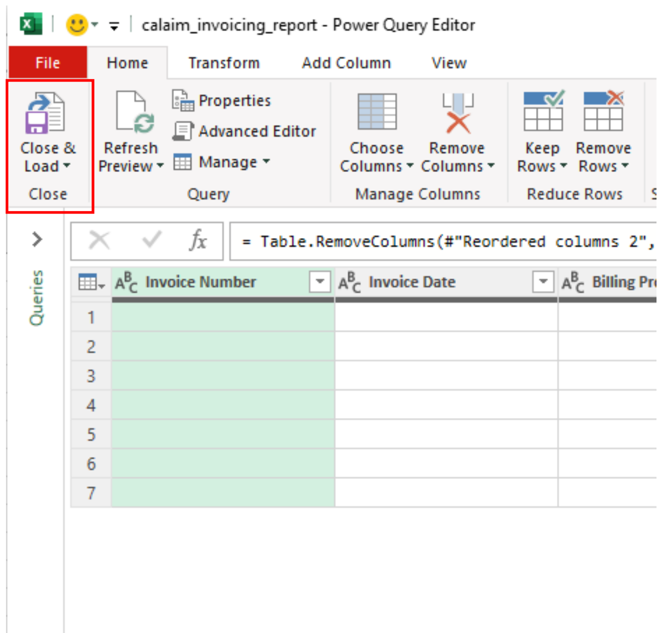
```
#"Promoted headers" = Table.PromoteHeaders(Source, [PromoteAllScalars = true]),

  #"Changed column type" = Table.TransformColumnTypes(#"Promoted headers", {{"", Int64.Type}, {"Member ID Nbr (CIN)", type text}, {"Member Last Name", type text}, {"Member First Name", type text}, {"Member Street Address", type text}, {"Member City", type text}, {"Member State", type text}, {"Member Zip Code", type text}, {"Member Date of Birth", type text}, {"Member Gender - MALE", type text}, {"Member Gender - FEMALE", type text}, {"Member Gender - UNKNOWN", type text}, {"Payer ID", type text}, {"Diagnosis Code 1", type text}, {"Place of Service (POS)", type text}, {"Service Start Date", type text}, {"Service End Date", type text}, {"Diagnosis Code 2", type text}, {"Diagnosis Pointer Code", type text}, {"Authorization Number", type text}, {"Payer Name", type text}, {"Procedure Code", type text}, {"Modifier 1", type text}, {"Modifier 2", type text}, {"Service Unit Count(s)", Int64.Type}, {"Service Unit Cost", type text}, {"Total Billed Amount", type text}, {"LEAVE BLANK", type text}, {"LEAVE BLANK_1", type text}, {"LEAVE BLANK_2", type text}, {"LEAVE BLANK_3", type text}, {"LEAVE BLANK_4", type text}, {"Invoice Number", type text}, {"Invoice Date", type text}, {"Billing Provider NPI", type text}, {"Billing Provider Tax ID", type text}, {"Billing Provider Taxonomy Code", type text}, {"Billing Provider Organization or Last Name", type text}, {"Billing Provider Phone Number", type text}, {"Billing Provider Street Address", type text}, {"Billing Provider City", type text}, {"Billing Provider State", type text}, {"Remarks (Optional)", type text}, {"On set date", type text}, {"Rendering Provider NPI", type text}, {"Diagnosis Code 3", type text}, {"Diagnosis Code 4", type text}, {"Diagnosis Code 5", type text}, {"Modifier 3", type text}, {"Modifier 4", type text}, {"Accept Assignment", type text}, {"LEAVE BLANK_5", type text}, {"Billing Provider Zip Code", type text}}),

  #"Reordered columns 2" = Table.ReorderColumns(#"Changed column type", {"Invoice Number", "Invoice Date", "Billing Provider NPI", "Billing Provider Tax ID", "Billing Provider Taxonomy Code", "Billing Provider Organization or Last Name","LEAVE BLANK_3", "Billing Provider Phone Number", "Billing Provider Street Address", "Billing Provider City", "Billing Provider State", "Billing Provider Zip Code", "Remarks (Optional)", "Member ID Nbr (CIN)", "Member Last Name", "Member First Name", "On set date", "Member Street Address", "Member City", "Member State", "Member Zip Code", "Member Date of Birth", "Member Gender - MALE", "Member Gender - FEMALE", "Member Gender - UNKNOWN", "Rendering Provider NPI", "LEAVE BLANK", "LEAVE BLANK_1", "Payer ID", "Payer Name", "Diagnosis Code 1", "Diagnosis Code 2", "Diagnosis Code 3", "Diagnosis Code 4", "Diagnosis Code 5", "Place of Service (POS)", "LEAVE BLANK_2", "Procedure Code", "Modifier 1", "Modifier 2", "Modifier 3", "Modifier 4", "Service Start Date", "Service End Date", "Diagnosis Pointer Code", "Service Unit Count(s)", "Service Unit Cost", "Total Billed Amount", "Authorization Number", "Accept Assignment", "LEAVE BLANK_4", "LEAVE BLANK_5"}),

  #"Removed columns" = Table.RemoveColumns(#"Reordered columns 2", {""})

In

  #"Removed columns"
```

10) The editor now looks like this. Once done, click “Done”



11) The changes to the report should be complete! Click “Close & Load” and save your new file.

a. Note – you may need to delete “Sheet 1” from the report tabs to save in the format the Alliance is requesting.


calaim_invoicing_report - Power Query Editor
File
Home
Transform
Add Column
View
Close & Load
Refresh Preview
Properties
Advanced Editor
Manage
Choose Columns
Remove Columns
Keep Rows
Remove Rows
Close
Query
Manage Columns
Reduce Rows
Queries
= Table.RemoveColumns(#"Reordered columns 2",
Invoice Number
Invoice Date
Billing Pr