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Adjusted Allocation: 0.00

Remaining: -219,000.00
Applicants shall respond to the prompts or questions in the areas listed below in a narrative form.

A) APPLICANT INFORMATION - General Information, Experience and Capacity

1. Project Title: Optimizing Medicaid in Ohio Schools

2. Executive summary: Provide an executive summary of your project proposal and which goal(s) in question 8 you seek to achieve. Please limit your responses to no more than three sentences.

This project will help schools claim funds available to them through Optimizing Medicaid in Ohio Schools program, which reimburses schools for the cost of clinical services provided to low income special needs students. Over 85% of available funds are left unclaimed by Ohio schools every year, primarily due to the unwieldy administrative processes involved in filing Medicaid claims. Project partners will develop software that transmits data recorded by clinicians directly to Medicaid billers, automating the process of filing claims and driving hundreds of thousands of dollars back into classrooms.

8400 3. Total Students Impacted:

4. Lead applicant primary contact: - Provide the following information:

First Name, Last Name of contact for lead applicant: Mark Wilcheck
Organizational name of applicant: TRECA Digital Academy
Unique identifier (RIN/Fed Tax ID): 143305
Address of lead applicant: 100 Executive Drive Marion, Ohio 43303
Phone Number of lead applicant: 740.389.4798
Email Address of lead applicant: mwilcheck@trea.org

5. Secondary applicant contact: - Provide the following information, if applicable:

First Name, Last Name of contact for secondary applicant: Larry Zimmerman
Organizational name of secondary applicant: TRECA Digital Academy
Unique identifier (RIN/Fed Tax ID): 143305
Address of secondary applicant: 100 Executive Drive Marion, Ohio 43303
Phone number of secondary applicant: 740.389.4798
Email address of secondary applicant: lzimmerman@trea.org

6. List all other participating entities by name: Provide the following information for each additional participating entity, if applicable: Mention First Name, Last Name, Organizational Name, Unique Identifier (RIN/Fed Tax ID), Address, Phone Number, Email Address of Contact for All Secondary Applicants in the box below.

Gary Barber - Marion City Schools, RIN 044339, 420 Presidential Dr., Marion, Oh 43302 (740) 387.3300 gary_barber@marioncity.k12.oh.us
James Gunner - Sandusky Perkins Local Schools, RIN 046813, 1714 Campbell St., Suite B., Sandusky, Oh 44870 (419) 450.3728 jgunner@perkinschools.org

7. Partnership and consortia agreements and letters of support: - (Click on the link below to upload necessary documents).

* Letters of support are for districts in academic or fiscal distress only. If school or district is in academic or fiscal distress and has a commission assigned, please include a resolution from the commission in support of the project.

* If a partnership or consortium will be established, please include the signed Straight A Description of Nature of Partnership or Description of Nature of Consortium Agreement.

Upload/GrantApplicationAttachment.aspx

8. Please provide a brief description of the team or individuals responsible for the implementation of this project including relevant experience in other innovative projects. You should also include descriptions and experiences of partnering entities.

The organization responsible for providing leadership and support for the successful implementation of the Optimizing Medicaid in Ohio Schools program is the Tri-Rivers Educational Computer Association (TRECA). At TRECA we are in the business of helping schools reduce their operational costs through the sharing of expertise, resources, and technology. Since our founding in 1979, we have operated on the principles of understanding the challenges schools face on a daily basis and delivering quality services to overcome those barriers. With a growing consortium of 38 school districts, TRECA is committed to helping clients get the most out of their educational support services for the lowest possible cost. TRECA is an Information Technology Center (ITC) site, that provides fiscal, support, and student services statewide to Ohio’s school districts. Headquartered in Marion, OH, TRECA districts across the state (the TRECA “footprint”), CAM Achievement is led by Tom McDowell, who has over 40 years of educational experience as a Teacher, Speech and Language Pathologist, Educational Diagnostician, Special Education Coordinator, Assistant Principal, Principal, Director, Executive Director, and Educational Consultant. He was responsible for integrating the online Individual Education Plan (IEP) system with the web-based Medicaid billing system in the state of Florida, which has enabled Florida Schools to claim and recover nearly $200MM in Medicaid reimbursements. Atlantic Research Partners work with schools across the country to analyze and improve the organizational, pedagogical, project management and leadership practices that affect student achievement. Experienced education and project management professionals provide sustainable, research-based supports to improve employee performance, school accountability and efficiency, and ultimately student achievement. The three school districts selected for participation in this pilot project are among the most underserved, needy districts in Ohio. With large populations of low-income special needs students, they were selected because they stand to make the most significant immediate gains from improved access to Medicaid reimbursements. Marion is a small urban post-industrial city that has seen a substantial increase of student poverty in recent years. According to the district’s 2012-2013 Report Card, the district has an average daily enrollment of nearly 4,300 students, 99.9% of whom are considered economically disadvantaged. 17.3% of students have confirmed disabilities. Sandusky-Perkins (Perkins) is a small service area, with nearly 3,300 students, one-third are economically disadvantaged, and 12% burdened with increasing poverty. Of approximately 2,300 students, one-third are economically disadvantaged, and 12% burdened with increasing poverty. Of approximately 2,300 students, one-third are economically disadvantaged, and 12% burdened with increasing poverty. However, lack of awareness about the program and logistical challenges have historically prevented schools from taking full advantage of it. In many cases, students’ Individualized Education Plans (IEP) call for special services such as speech pathology, occupational therapy and physical therapy. For low-income students with special needs, these services are Medicaid-eligible. Presently, schools in Ohio may request reimbursement via two types of claims: 1) Fee-for-Service Claiming - Medicaid reimburses schools for the cost of direct services provided, such as an occupational therapy or counseling session. Full or partial reimbursement is available, depending on the nature of the service. Fee-for-service claims are submitted to the state Medicaid agency. 2) Administrative Claiming - Schools may request reimbursement for work that is related to the provision of direct services to students, such as referrals and case management. Schools calculate costs using a formula that takes into account the amount of staff time spent and number of individuals involved. Though it sounds simple, excessive paperwork, cumbersome administrative processes, lack of understanding of the process, and the inability to capture...
12. Describe how it will meet the goal(s) selected above. - If school/district receives school improvement funds/support, include a brief explanation of how this project will advance the improvement plan.

Because TRECA serves as one of the largest educational consortiums in Ohio, it is poised to lead an effort integrating the data it already stores and assists districts to manage - all of which could lead to improved patient outcomes. The project would lead to new and improved patient outcomes. The project would lead to new and improved patient outcomes. The project would lead to new and improved patient outcomes.

13. Financial Documentation - All applicants must enter or upload the following supporting information. Responses should refer to specific information in the financial documents when applicable:

   a. Enter a project budget
   b. Upload the Straight A Financial Impact Template forecasting the expected changes to the five-year forecast resulting from this project. If applying as a consortia or partnership, please include the five-year forecasts of each district, community school or STEM school member for review.

   c. If subsection (b) is not applicable, please explain why, in addition to how the project will demonstrate sustainability and impact.

14. What is the total cost for implementing the innovative project?

219,000.00 * Total project cost

* Provide a brief narrative explanation of the overall budget. The project should include the source and amount of other funds that may be used to support this concept (e.g., Title I funding, RTT money, local funding, foundation support, etc.), and provide details on the costs of items included in the budget (i.e. staff counts and salary/benefits, equipment to be purchased and cost, etc.).

125,000 Purchased Service - Software interface development for district use to interface with Student Information Systems as well as Individualized Education Plan software. 12,000 Purchased Service - Licensing fee for Medicaid Billing program $21,000 Purchased Service - Medicaid in Schools reimbursement documentation and protocol $31,000 Purchased Service - Professional Development for staff on documentation and protocol $30,000 Capital Outlay - iPad/dsaa entry devices for documentation of Medicaid billing by providers at district level. 60 iPads at $500 each The iPad's would be used by therapists and clinicians to enter the data. Other funds that would be used would be local funds to implement and support the development of the program estimating that each district and provider would spend $25,000.

15. What new/recurring costs of your innovative project will continue once the grant has expired? If there are no new/recurring costs, please explain why.

22,500.00 * Specific amount of new/recurring cost (annual cost after project is implemented)

* Narrative explanation/rationale: Provide details on the costs of items included in the budget (i.e. staff counts and salary/benefits, equipment to be purchased and cost, etc.). If there are no new/recurring costs, please explain why.

Recurring costs would be a yearly $12,000 in licensing fee renewals and $10,500 in yearly audit fees as required by the Medicaid program. This totals $22,500 per year or $121,500 for the five fiscal years listed in the Financial Impact Template. The only other possible recurring costs would be software interface updates as well as the cost of administrative overhead and billing. Presently these are estimated at a 4% reduction (10% over the cost of the first year) to $12,000 for the next four years. The total spending would reduce this amount to less than 20% cumulative. The equipment purchases would be used to offset staff time for the keystroking and data reentry of the billing and documentation.

16. Are there expected savings that may result from the implementation of the innovative project?

466,500.00 * Specific amount of expected savings (annual)

* Narrative explanation/rationale: Provide details on the anticipated savings (i.e. staff counts and salary/benefits, equipment to be purchased and cost, etc.).

The project will generate an estimated $1,945,000 in recovered funds for the participating, pilot school districts over the five year period listed in the Financial Impact Template. Additional district in the TRECA footprint and participating school districts are expected to receive similar returns, with an overall expected savings of more than 25% of the total recovery. The project is self-sustainable and provides a 450% return on investment with no additional staff or personnel needed to implement the program, and the utilization of greater resources to the classroom. This expected savings was determined by using the number of students being served that would be eligible for Medicaid reimbursement (370) at an average reimbursement of $1,950 per student ($555,000) an subtracting the cost of reimbursements ($4 students at $1,500 or $6,000 for the three participating districts. This would provide an additional $489,000 annually for services that school districts are currently using other local funds to pay for. Subtracting the $22,500 recurring costs leaves a total expected savings of $466,500. These additional recovered funds will allow the partnering districts to reduce the purchased services costs they are currently paying for eligible services.

17. Provide a brief explanation of how the project is self-sustaining. If there are ongoing costs associated with the project after the term of the grant, this explanation should provide details on the cost reductions that will be made that are at least equal to the amount of new/recurring costs detailed above. If there are no new/recurring costs, explain in detail how this project will sustain itself beyond the term of the grant.

The ongoing costs associated with this program are estimated to be less than 25% of the funds to be recovered. The savings of $466,500 on every dollar recovered will allow the participating districts to fund the additional services that students will need. The remaining 25 cents on the dollar will go towards funding existing staff positions, purchasing software upgrades and occasional equipment replacements. With program costs estimated at less than 25% of the total recovery, the project is self-sustainable and provides a 450% return on investment. No additional staff or personnel will be needed to implement the program, and the reduction in
D) IMPLEMENTATION - Timeline, communication and contingency planning

18. Fill in the appropriate dates and an explanation of the timeline for the successful implementation of this project. In each explanation, be sure to briefly describe the largest barriers that could derail your concept or timeline for implementation and your plan to proactively mitigate such barriers. In addition, the narrative should list the stakeholders that will be engaged during that stage of the project and describe the communication that occurred as the application was developed.

Describe the ongoing communication plan with the stakeholders as the project is implemented. (Stakeholders can include parents, community leaders, foundation support and businesses, as well as educational personnel in the affected entities.)

* Proposal Timeline Dates

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<th>Plan (MM/DD/YYYY):</th>
<th>1.6.14 - 1.3.14</th>
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* Narrative explanation

Plan development phase including contingency for barriers Barriers will be staff needs for certification, changes in federal laws once project begins, training of parents and staff, and unions. The stakeholders will be IDEA school staff, Parents, Administrators at the school. In particular, a barrier could be special education staff and directors as well as outside agencies. The barriers will be managed through administrative and policy means to overcome resistance. Because these funds will eventually fund the positions of staff, there is a natural relationship between success and continued employment and adequate staffing.

Implement (MM/DD/YYYY): 2.1.14 - 4.1.14

* Narrative explanation

Implementation phase including management plan: The management plan development will coordinate each step of the process through the deliverables outlined elsewhere in the document and assure a successful completion. TRECA, the primary partner, has extensive success and experience in managing technology projects to completion as evidenced by their successful online school. The milestones for each step in the management plan will be developed in accordance with technology protocols and standards and then placed in a project management tool that drives reminders and specific deadlines for the calendars of all parties involved.

Summative evaluation (MM/DD/YYYY): 4.1.14 - 4.15.14

* Narrative explanation

Summative evaluation phase This project will utilize a managed communication plan to all staff members impacted by the work including weekly updates that include progress to date with key benchmarks. Further, we would demonstrate through the existing decentralized by powerful communications program of TRECA Digital Academy and TRECA the consortium and partnership roles as well as the implementation steps outlined in the deliverables found elsewhere in this grant would be administered in a project management approach that clearly demonstrates the benefit to school districts of the substantial return on investment (over 500% and over $450,000 annually of additional resources generated to serve students of poverty with special needs while minimizing the local contribution that previously had to used to fill this gap).

19. Describe the expected changes to the instructional and/or organizational practices in your institution.

Changes resulting from this project will be primarily organizational. The project will fundamentally change the way districts document services provided to special needs students, streamlining the process to save staff time and resources. While many participating schools were previously unable to fully participate in the Medicaid in Schools program, this project will virtually automate the process of filing Medicaid claims for clinical services provided to low-income special needs students. The new software will improve the efficiency of administrative staff, and will also relieve teachers and clinicians of tedious busywork. While the project will not directly change the instructions practices, the significant new revenue stream available to participating schools will have a profound impact on the quality and availability of services for special needs students. With access to Medicaid reimbursements, schools will be able to expand the scope of services offered to low-income students with special needs. Schools already offering support services will recover hundreds of thousands of dollars that can be redirected to classrooms. More funds for classrooms will likely result in a number of positive changes to instructional practices, which remain to be seen.

E) SUBSTANTIAL IMPACT AND LASTING VALUE - Impact, evaluation and replication

20. Describe the rationale, research or past success that supports the innovative project and its impact on student achievement, spending reduction in the five-year fiscal forecast or utilization of a greater share of resources in the classroom.

On October 6, 2013, the Akron Beacon Journal reported that Ohio Schools were leaving over $200 million in Medicaid funding uncollected on an annual basis. The article went on to cite administrative costs in place to track the program's progress). The State of Ohio recently began offering incentives for Medicaid providers to accept and implement electronic health record technology. As the State makes a broad move towards digital health records, this grant initiative demonstrates a timely alignment with public policy in Ohio and the needs of Ohio's schools. This project replicates and adapts successful efforts in states including Florida (Panhandle Area Education Consortium), Kentucky (School-Based Health Services program), and Kansas (Medicaid Transformation Program).

21. Is this project able to be replicated in other districts in Ohio?

Yes

22. If so, how?

The Optimizing Medicaid in Ohio Schools project will generate significant, steady revenue for participating schools. By streamlining the process of filing Medicaid claims, it will enable schools to access a resource that has gone grossly understated by many years. It will drive more dollars into Ohio classrooms, and provide schools with the funding needed to improve instructional services for students of all backgrounds and levels of ability. The project will also seize an unprecedented opportunity for schools to benefit from new legislation: i.e., the Affordable Care Act. With thoughtful preparation and an innovative approach, Ohio can take advantage of new resources available to students through the ACA outside of the new law.

23. Describe the substantial value and lasting impact that the project hopes to achieve.

The Optimizing Medicaid in Ohio Schools project will generate significant, steady revenue for participating schools. By streamlining the process of filing Medicaid claims, it will enable schools to access a resource that has gone grossly understated for many years. It will drive more dollars into Ohio classrooms, and provide schools with the funding needed to improve instructional services for students of all backgrounds and levels of ability. The project will also seize an unprecedented opportunity for schools to benefit from new legislation: i.e., the Affordable Care Act. With thoughtful preparation and an innovative approach, Ohio can take advantage of new resources available to students through the ACA outside of the new law.

24. What are the specific benchmarks related to the fund goals identified in question 9 that the project aims to achieve in five years? Include any other anticipated outcomes of the project that you hope to achieve that may not be easily benchmarked.

Student Achievement: The resources that go to the classroom will target classroom interventions for eligible children and will result in a reduction of at least 5% within three (3) years in the learning gap for students with disabilities and students of low income. Spending Reductions and Cost Avoidance: Spending for Medicaid billing would be reduced by half within five (5) years of the implementation. Cost avoidance from staff not being utilized for additional paperwork and hand keystroking of data would be reduced by 75% during the period of the grant. Utilization of Greater Share of Resources in the Classroom: 100% of recovered funds will be returned to classroom targeted at instruction.

25. Describe the plan to evaluate the impact of the concept, strategy or approaches used.

* Include the method by which progress toward short- and long-term objectives will be measured. (This section should include the types of data to be collected, the formative outputs and outcomes and the systems in place to track the program's progress).

* Include the method, process and/or procedure by which the program will modify or change the program plan if measured progress is insufficient to meet program objectives.

The Optimizing Medicaid in Ohio Schools project will use monthly data reports showing funds received in key Medicaid areas of services to determine the effectiveness of the project. The services that will be reviewed will be Speech/Language, Occupational Therapist, Physical Therapist, Social work, Psychologist, nurses, special transportation, and guidance counselor. Data will be collected from the Medicaid billing system and CMS. The progress will be determined by the percentage of funds received to the percentage of services provided/cost of services. If the ratio changes to a negative outcome then modifications to the billing system and selected procedures will be reviewed and corrective measures implemented.

By virtue of applying for the Straight A Fund, all applicants agree to participate in the overall evaluation of the Straight A Fund for the duration of the evaluation timeframe. The Governing Board of the Straight A Fund reserves the right to conduct evaluation of the plan and request additional information in the form of data, surveys, interviews, focus groups, and any other related data to the legislature, governor, and other interested parties for an overall evaluation of the Straight A Fund.
I agree, on behalf of this applicant agency and/or all identified partners to abide by all assurances outlined in the Assurance section of the CCIP. In the box below, enter "I Accept" and indicate your name, title, agency/organization and today's date.

I Accept

Mike Carter
Superintendent, TRECA Digital Academy
Executive Director, TRECA
10.25.2013