

Long Term Care Cost Report Upload Process

Ohio Department of Medicaid
Department of Developmental Disabilities
March 2017



Welcome and thank you for attending the second session of Long Term Care (LTC) training for nursing facilities and intermediate care facilities. In the first session we had a brief overview of the new LTC cost report submission process occurring through the MITS portal and a detailed discussion of the security roles each LTC facility will need to be familiar with in order to submit their cost reports on-line through the MITS portal.

The second training has detailed screen shots of the new MITS portal submission process and we will walk you, as a provider, through the steps of submitting a LTC cost report on-line.



Introduction

- Long Term Care providers (Nursing Facilities (NFs) and Intermediate Care Facilities for Individuals with Intellectual Disabilities(ICFs-IID)) are now required to submit Medicaid cost reports online using the MITS portal
- Rule References:
 - NF: Ohio Administrative Code (OAC) 5160-3-20
 - ICF-IID: OAC 5123:2-7-12



Long Term Care providers (Nursing Facilities (NFs) and Intermediate Care Facilities for Individuals with Intellectual Disabilities(ICFs-IID)) are now required to submit Medicaid cost reports online using the MITS portal.

The rule references for the online submission of LTC cost reports can be located in the Ohio Administrative Code (OAC).

The Ohio Department of Medicaid for nursing facilities is located in OAC 5160-3-20.

The Department of Developmental Disabilities for intermediate care facilities is located in OAC 5123:2-7-12.



Introduction

- What this means for you:
 - » No more mailing of diskettes/CDs/flash drives – cost reports and their related documentation will be submitted online through MITS
 - » No more notarized signature page – this will be replaced with an electronic pin signature
 - » “Real time” submission ability – process of submitting and resubmitting should be much easier



What this means for you:

No more mailing of diskettes/CDs/flash drives – all cost reports and their related documentation will be submitted online through MITS for each LTC provider.

You will no longer have to submit a notarized signature page attesting to the accuracy and completeness of the LTC cost report – this will be replaced with an electronic pin signature (number) that an agent associated with the nursing home will use to certify the cost report through the MITS portal which ODM and DODD will be able to access through the MITS system.

“Real time” submission ability – process of submitting and resubmitting should be much easier



Introduction

- What stays the same:
 - » Automated Cost Report (ACR) software will still be used to complete cost reports
 - » Requirements and due dates have been extended – All NFs and ICFs have automatically been given a 14 day extension until April 14, 2017 for this years filing of 4.1 year end cost reports.



What stays the same:

The Automated Cost Report (ACR) software will still be used to complete cost reports.

For this cost reporting cycle for nursing facilities and intermediate care facilities, all long term care providers have automatically been given an extension to April 14, 2017. No extension requests are needed by the nursing facilities and intermediate care facilities and no individual extension requests will be given by the Ohio Department of Medicaid and Ohio Department of Developmental Disabilities as the extension due date of April 14, 2017 is for all long term care providers.



Security / Access Roles

- Cost Report Roles
 - » Prepare Save LTC CR
 - Agent
 - Accounting Firm
 - » View LTC CR
 - Agent
 - Accounting Firm
 - » Sign Approve LTC CR
 - Agent w/ PIN Approval



The detailed training previously reviewed the different roles associated with the submission of cost reports to ODM and DODD.

Cost Report Roles include:

Prepare Save LTC CR (as seen in the MITS portal) which allows the agent to save and upload information to the MITS portal. This will be the role most assigned by the LTC facilities in the MITS portal.

Agent

Accounting Firm

View LTC CR (as seen in the MITS portal) which only allows view only rights to the agent.

Agent

Accounting Firm

Sign Approve LTC CR

Agent w/ PIN Approval (as seen in the MITS portal) and this agent should be associated with the long term care facility (owner/administrator) as entering the PIN number certifies the submission of the cost report to ODM and DODD.

Each role must be established separately by the portal administrator for each NF / ICF. If you have a chain of nursing facilities or intermediate care facilities the agent roles have to be completed for each provider number separately.



Security / Access Roles

- MITS Portal Administrator
 - » Needs to be associated (employed) with the NFs / ICFs
 - » Completed through the MITS Portal
 - » Completed separately for each individual provider number
 - Each NF / ICF roles must be assigned separately to an agent or accounting firm
 - Prepare Save LTC CR (multiple users)
 - View LTC CR (multiple users)
 - Sign Approve LTC CR (one user)



MITS Portal Administrator

Needs to be associated (employed) with the NFs / ICFs as this is the role that assigns all of the other roles (agent, accounting firm, PIN holder)

Completed through the MITS Portal

Completed separately for each individual provider number

Each NF / ICF roles must be assigned separately to an agent or accounting firm

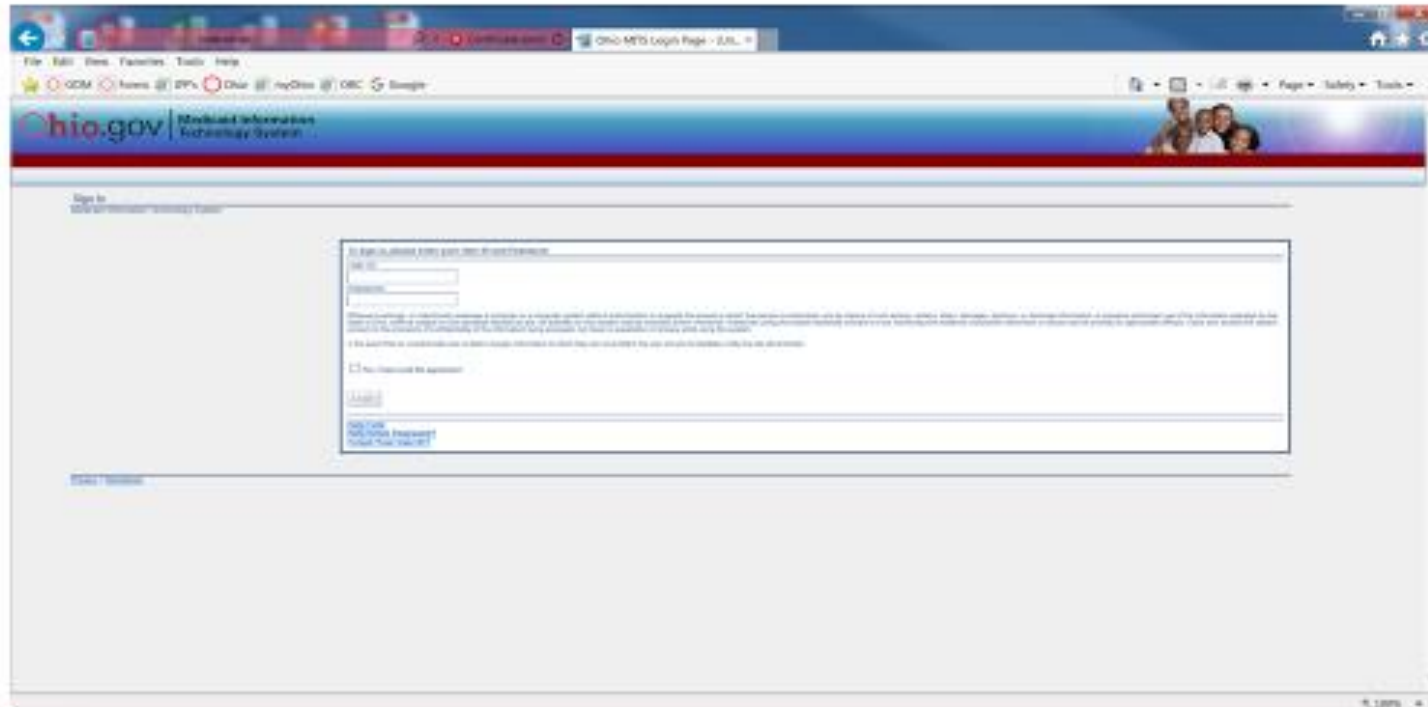
Prepare Save LTC CR (multiple users)

View LTC CR (multiple users)

Sign Approve LTC CR (one user)



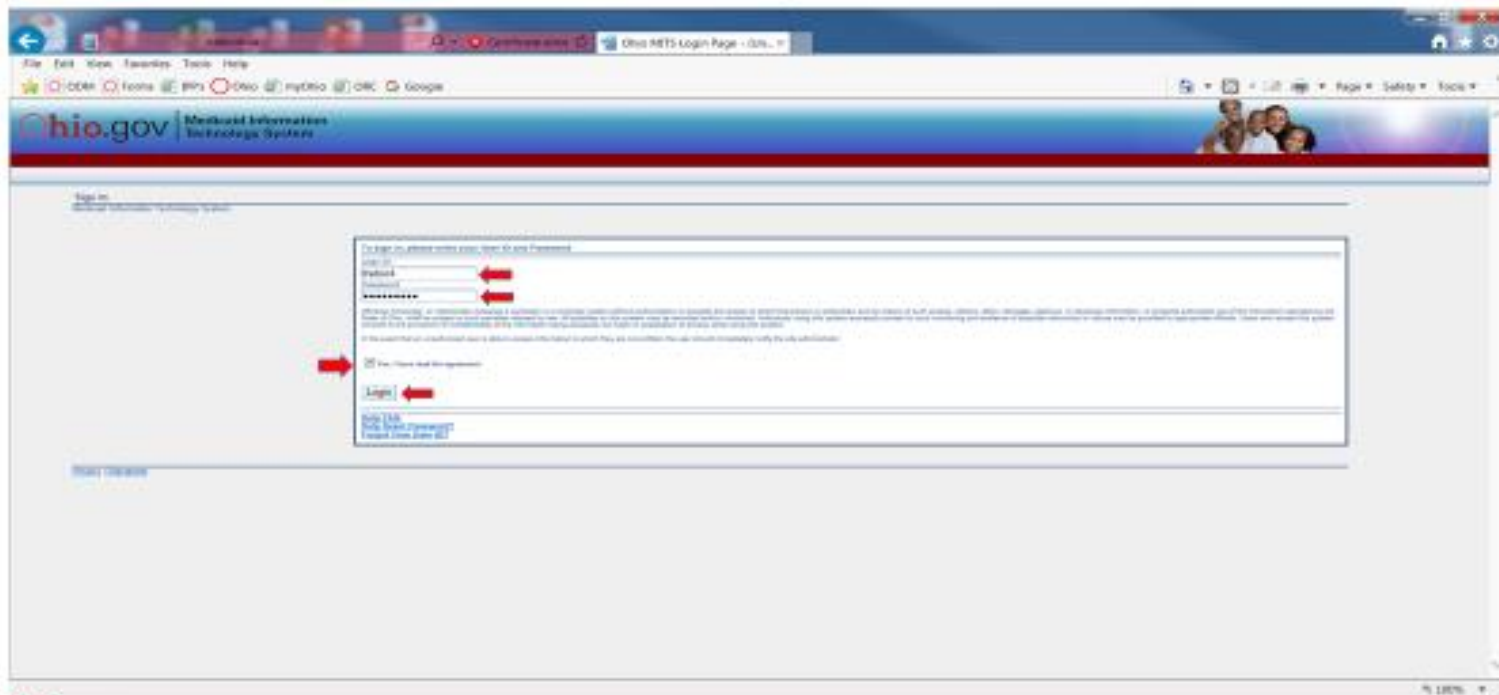
Getting Started - MITS Portal Sign-In Screen



When you enter the MITS portal to attempt to sign-in this should be the initial screen that you see.



MITS Portal Sign-In Screen



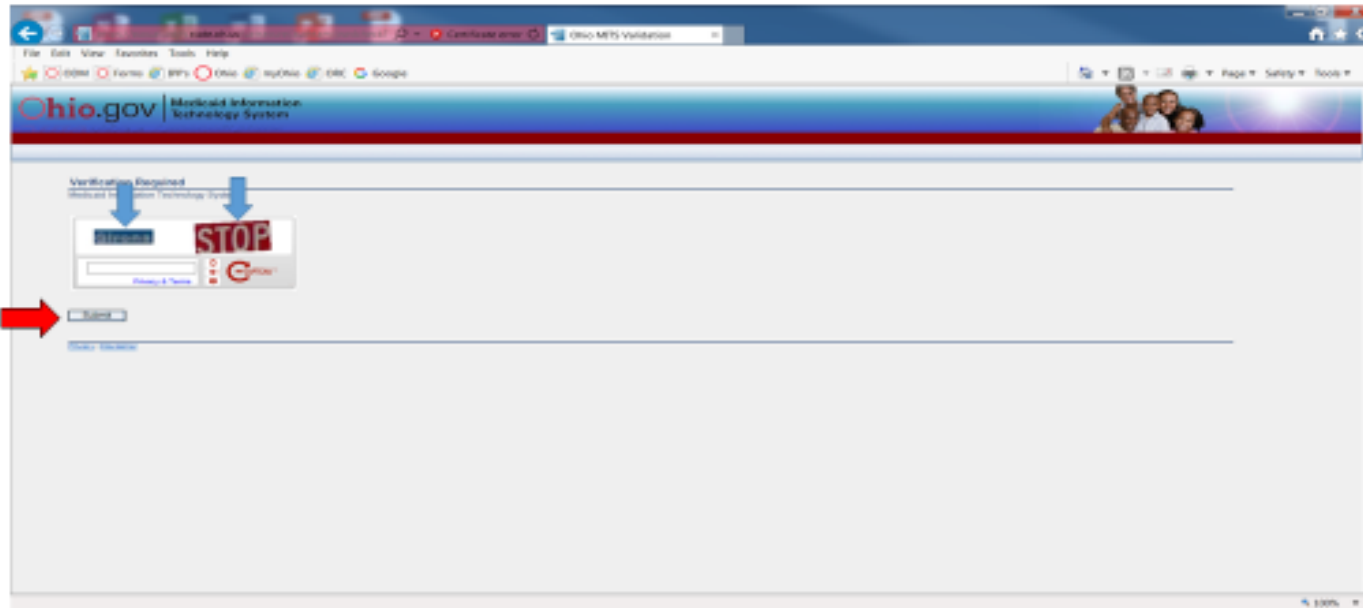
This is the MITS Portal Sign-In Panel. Each user has a specific User ID and Password that is unique to them.

You must also read the consent statement and check the box stating “Yes, I have read the agreement”

Next you click the box marked “Login” which will take you to a second log-in screen to verify that you are an actual user.



MITS Portal Verification Screen



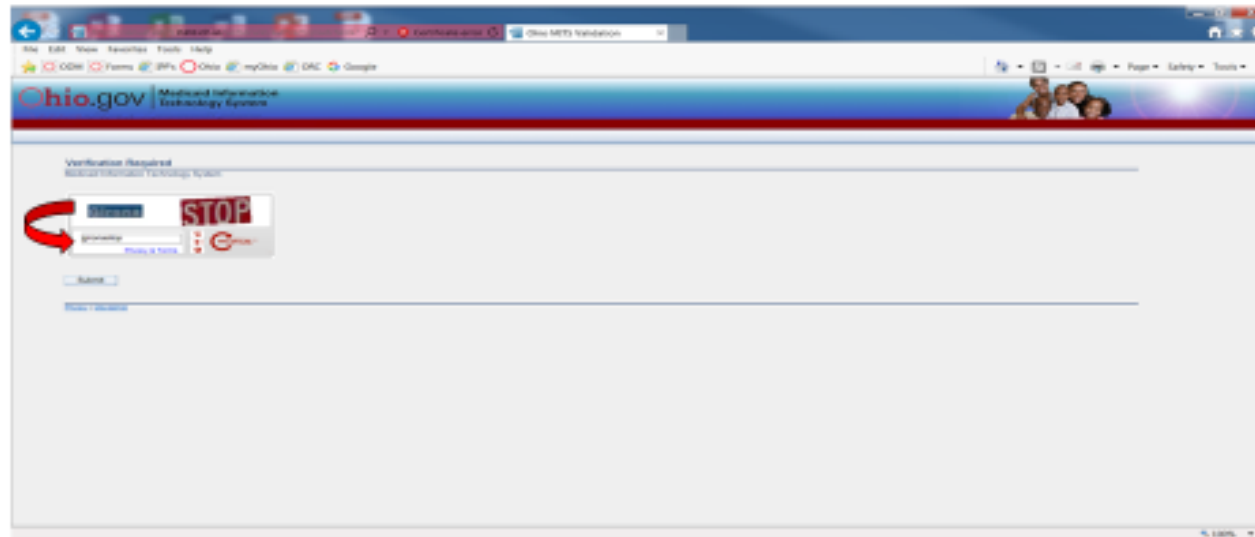
This is the second log-in screen that you must complete to enter the MITS portal. You must type in the visible words into the empty box to ensure you are not a robot who is trying to hack into the MITS portal. In this case you would type in the word “Girona” and “Stop” and click on the submit button.

The system should be able to read the characters whether or not you include a space between the two words or not.

Please note, if you cannot read the words that have been given to you simply click on the “submit” button and two new words will appear.



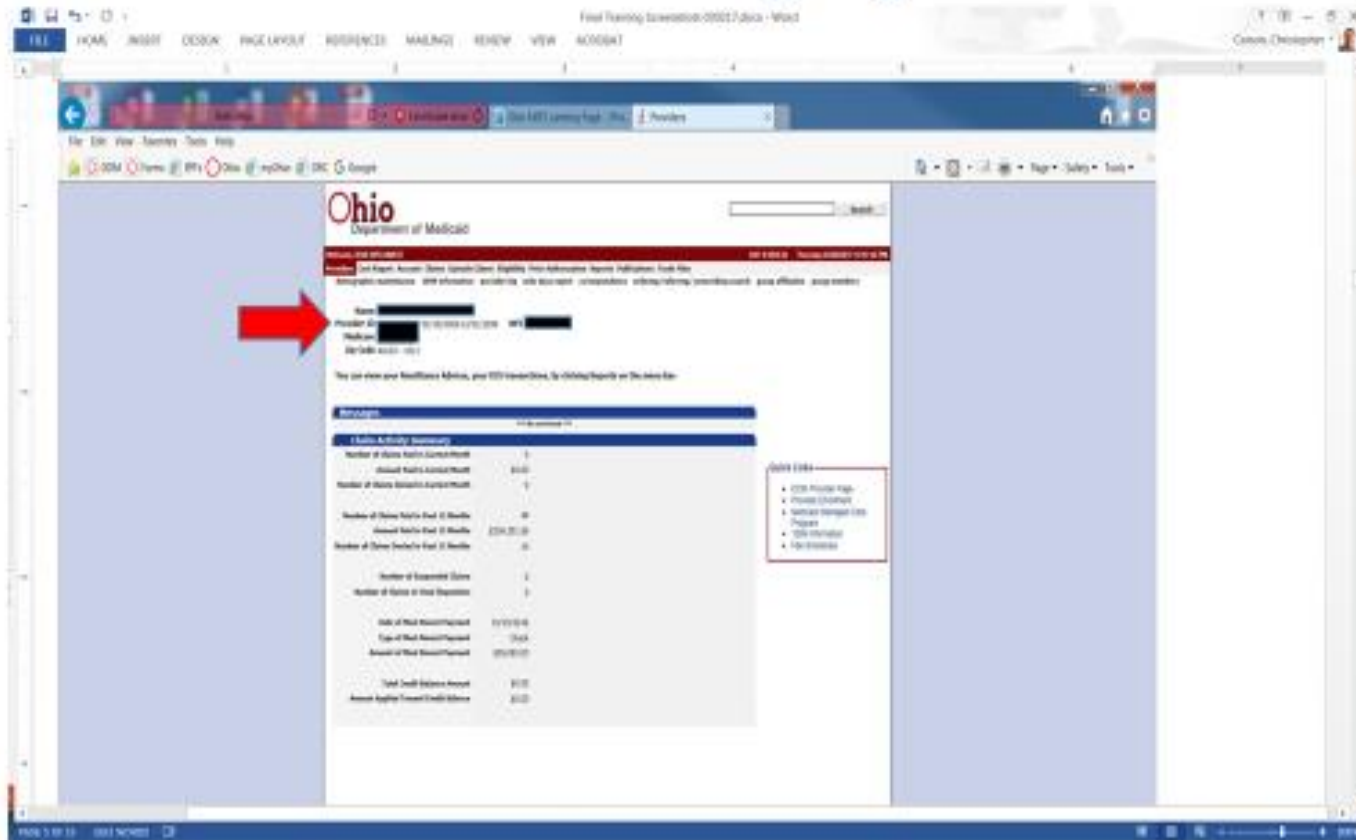
MITS Portal Verification Screen



Again, this can be written as one word or two. The MITS portal should accept it either way as long as it is spelled correctly.



Main Landing Page

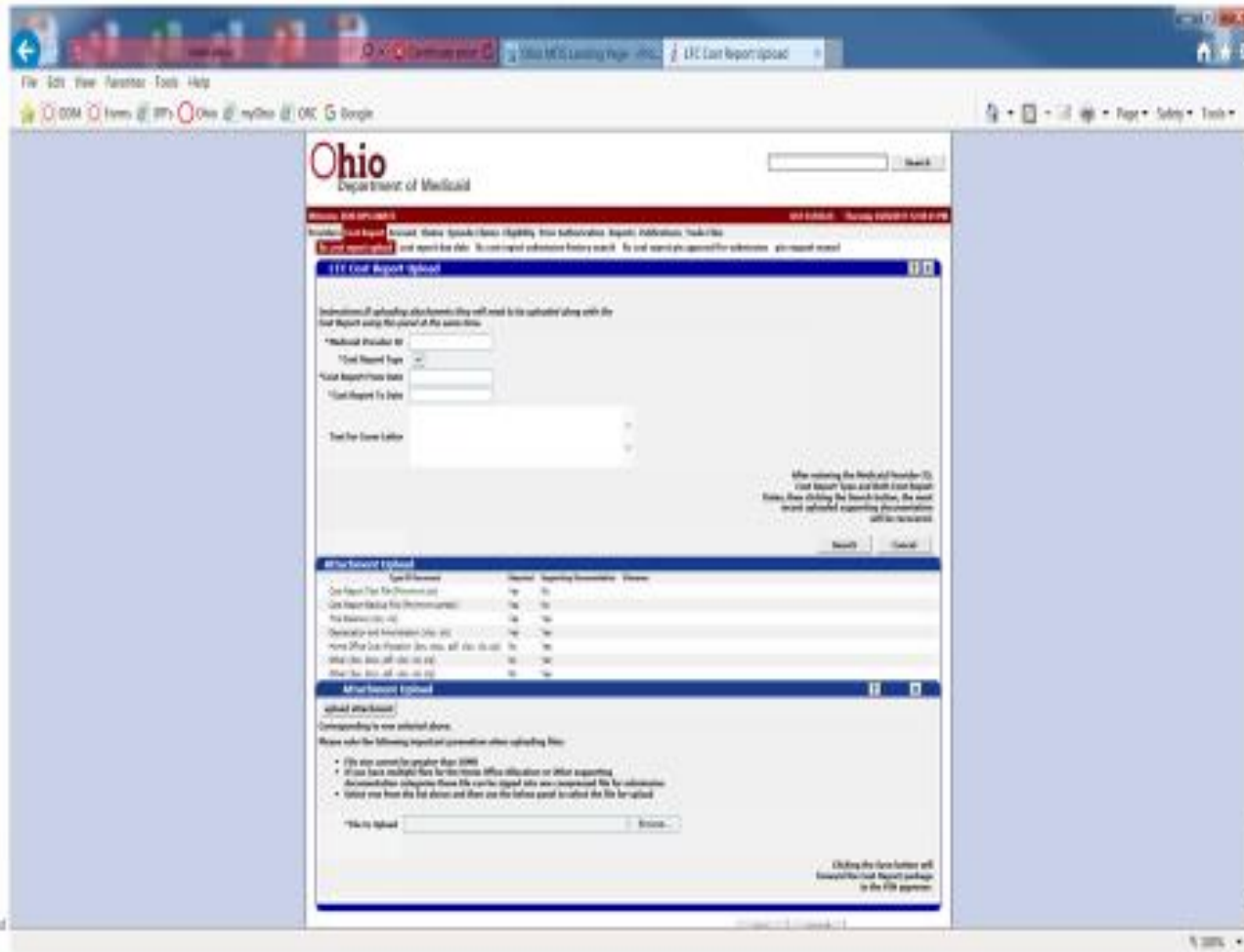


Once you Sign into the MITS portal and enter the correct verification information this should be your main landing page. It should contain the name of your long term care facility and it should have your current Medicaid provider number beneath the Provider name.

Just a note that the provider number, provider name and NPI number have been blacked out because the information in UAT has been backfilled with real provider information.



LTC Cost Report Upload Panel



The long term care cost report upload panel allows the authorized agents (accounting firm / agents) of the long term care provider to upload documents into the MITS portal for review by the Pin holder. In order to upload documents into the MITS portal the agents must have "Prepare Save LTC CR" rights. If the agents only have "View LTC CR" rights assigned to them they will not be able to upload documents to the MITS portal.



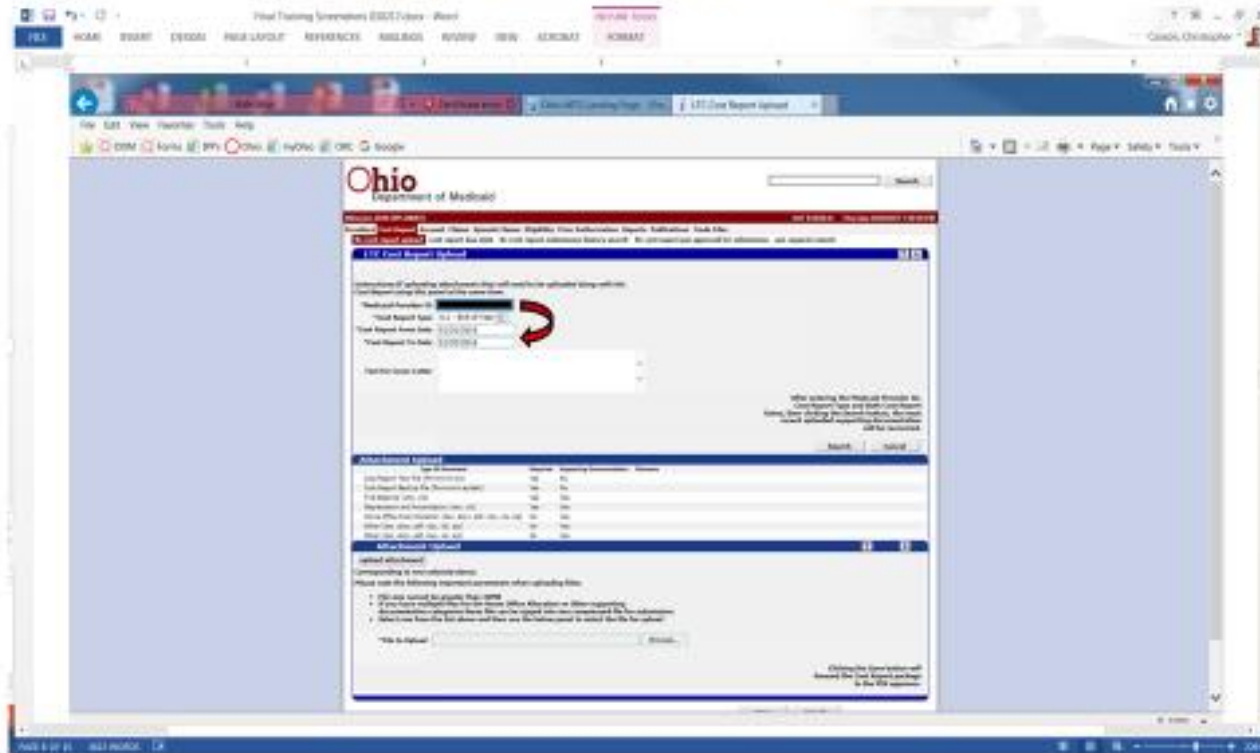
LTC Upload Panel Roles



As a reminder for both agents and accounting firms you must select an available role and move it to an assigned role in order for an agent or accounting firm to be able to save files to the long term care cost report upload screen. This is an example of the accounting firm screen and it shows both the “Prepare Save LTC CR” and the “View LTC Cost Report”. You must select the proper role for the agent or accounting firm move it to the assigned roles and click the submit button towards the bottom of the page. If you do not click the “submit” button then the proper roles will not be assigned to the respective agents and accounting firms.



LTC Cost Report Upload Panel



In order to submit information into the LTC Cost Report Upload Panel the long term care provider must fill in the following information:

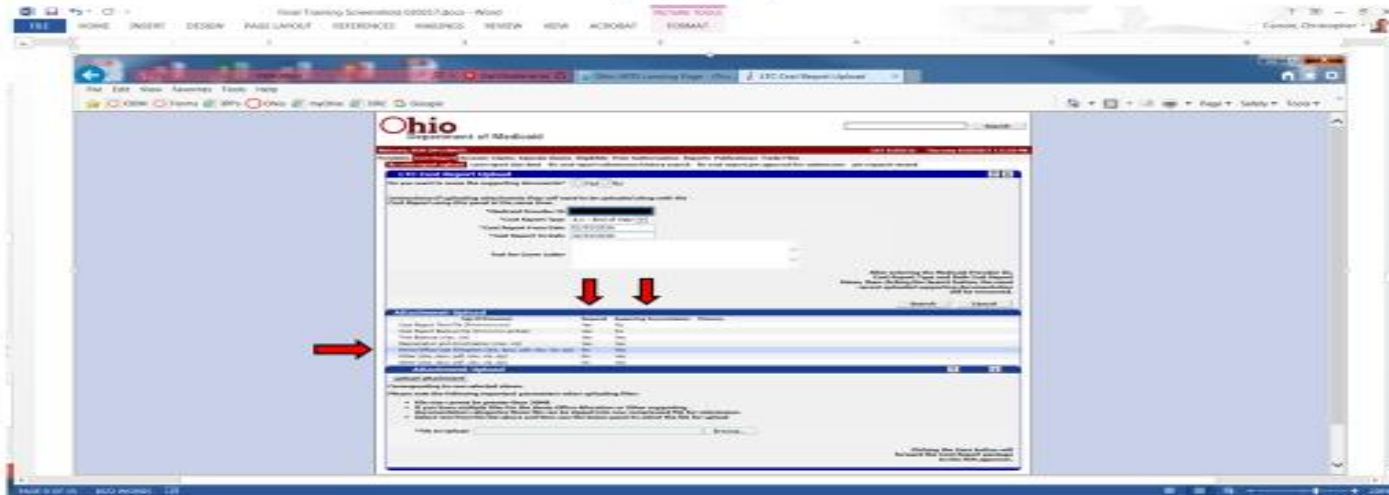
- 1) Medicaid Provider ID
- 2) Cost Report Type
- 3) Cost Report From Date
- 4) Cost Report to Date

Important Note:

This information is required in order to be able to upload documents into the MITS portal.



LTC Cost Report Upload Panel



In order to upload documents you need to click on one of the items listed under type of document. For example, click onto home office cost allocation. As you can see this is not a required document that has to be filed as it is supporting documentation. The document type can be either Word, Excel, PDF or a zip file. At a minimum you must submit the following files as they are required.

- 1) Cost Report Text File in the form of a text file
- 2) Cost Report Back-up File in the form of the ACR (Automated Cost Report)
- 3) Trial Balance as an Excel file

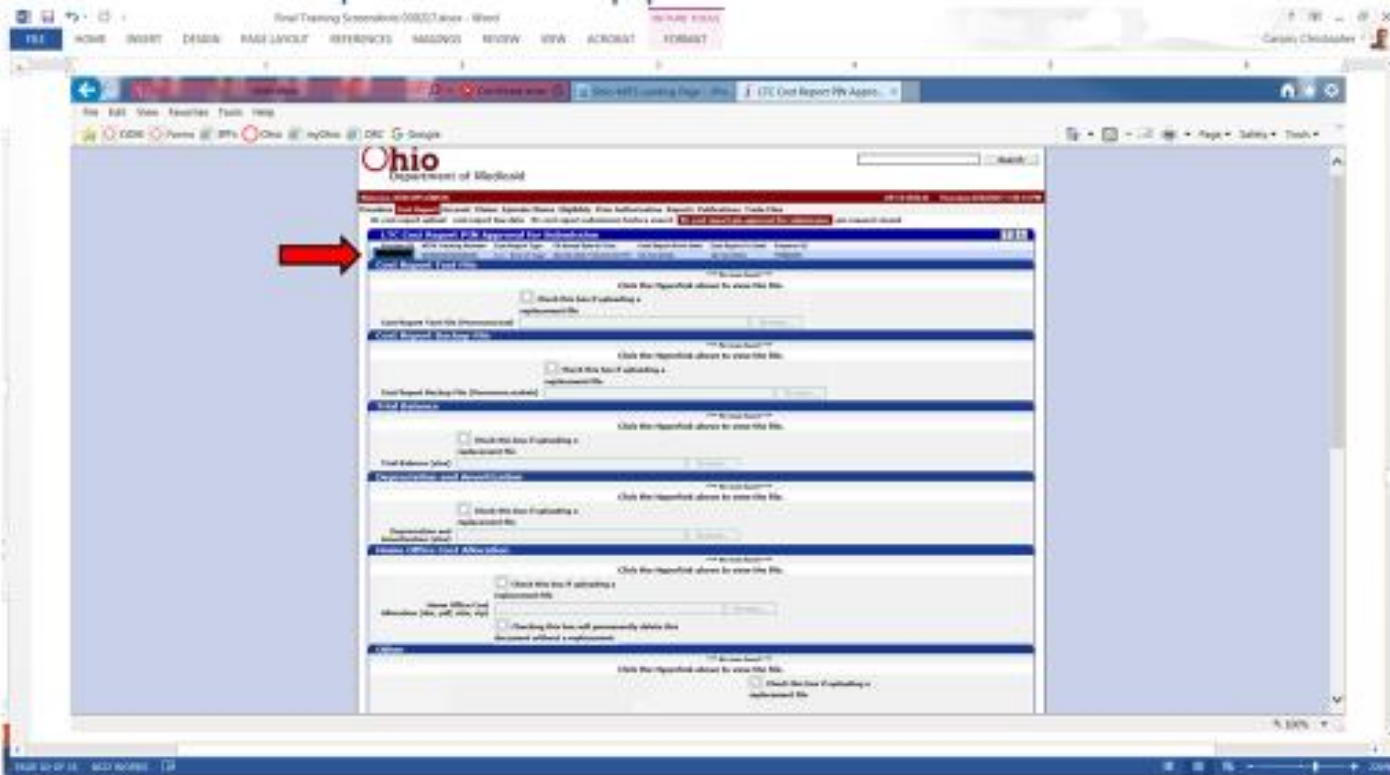
Please note that it has come to our attention that many of the accounting firms do not have the Trial Balance as an Excel file but rather a PDF file. If this is the case for your submission, then you will have to load a blank excel file in the location of the Trial balance since this is a required document to be filed. You can then save the PDF version of the trial balance in an "Other File" location that is located further down the upload document. This is something that we will work on changing for future cost report submissions.

- 4) Depreciation and Amortization file also as an Excel file

In order to upload a file you must click on the file type that you want to upload to the MITS portal. Next, you click on the browse box at the bottom center of the page. This will allow you to browse files on your computer in order to select the correct file that matches the "Type of Document" that you are trying to upload. Once you have selected the correct document to upload through the browse function it shows up in the "File to Upload" box. Once the correct file shows up in the "File to Upload" box you then click on the "Upload Attachment" box in order to attach the file to the MITS portal. You repeat the process until all of the required documents and any non-required documents have been uploaded.



LTC Cost Report PIN Approval for Submission Panel



Once the cost report and other supporting documents have been saved it is forwarded to the PIN holder for review. Unfortunately, the agents (accounting firms and agents) cannot save the files without them being forwarded to the PIN Holder. The agents do have the ability to add and save additional files after the initial save. The documents will be at the PIN holder level and as long as the PIN holder has not certified the documents to ODM or DODD or rejected the files then additional files can be added by the accounting firm and non-PIN holder agents.

The PIN holder has the ability to delete and replace files or delete only. The required files from the LTC Cost Report Upload Panel still have to be maintained in this screen. They may be deleted but they must be replaced prior to certifying the cost report for submission to the Ohio Department of Medicaid and the Ohio Department of Developmental Disabilities.

By clicking on the line by the red arrow the files populate in the proper locations. This allows the PIN holder to open and review the information contained in the individual files.



LTC Cost Report PIN Approval for Submission Panel



This screen shot is the bottom half of the PIN Approval for Submission Panel. This is where the PIN holder has the ability to reject the cost report and supporting documents back to the agents or approve and certify the documents for submission.

When the PIN holder rejects the cost report and supporting documentation it goes back to the accounting firm and agent. The accounting firm and agent must reload all of the documents (both required and non-required) and click the save button. Please remember that the four required documents must be uploaded before the files can actually be saved.



LTC Cost Report Submission History Search Panel



This panel allows the user to view the documents that have been submitted to the Ohio Department of Medicaid and the Ohio Department of Developmental Disabilities for a given cost report period. This screen also shows the status of the cost report so the provider can tell if the cost report has been cleared or is still in a pending status.



LTC Cost Report Submission History Search Panel

The screenshot shows a web browser window displaying the Ohio Department of Medicaid website. The main content area features a search panel titled "LTC Cost Report Submission History Search". The panel includes the following fields and options:

- Provider Type:** A dropdown menu with a red arrow pointing to it.
- Cost Report Type:** A dropdown menu.
- MCO Funding Number:** A text input field.
- Cost Report From Date Range:** A date range selection field.
- Cost Report To Date Range:** A date range selection field.
- Fiscal Year:** A dropdown menu.
- Request ID:** A text input field.
- Search:** A button with a red arrow pointing to it.

At the bottom of the page, there is a footer with the following text: "Home | Privacy Statement | Contact Us", "OH.A.S.A. Connect", and "Copyright 2011 OH Department of Medicaid. All rights reserved." The page number "5/100" is visible in the bottom right corner.

Since the user is already logged in under a specific provider number, the provider type “all” can be selected. This will show the status for all of the submitted documents for this provider. You may have to click on the search button twice in order to have any information become visible on the screen.

You should be able to search by multiple ways in order to find the necessary files. Such as by:

- 1) Provider Type
- 2) Medicaid provider ID
- 3) Cost Report from and to Date range
- 4) MITS tracking number (assigned by the MITS portal once the files are saved)
- 5) Cost report submission date
- 6) Cost report status
- 7) Submitter ID
- 8) Cost Report Type
- 9) Fiscal Year

Since for the initial filing you will only have one fiscal year’s worth of cost report data being submitted the “all” category under the Provider Type may be the easiest way to find out the status of the cost reports that have been submitted.

“Please note that we may currently have a defect on this screen that we are currently checking on. By entering the provider ID number and hitting the search button no files became visible.”



LTC Cost Report Submission History Search Panel

The screenshot displays the 'LTC Cost Report Submission History Search' panel within a web browser. The browser's address bar shows 'http://www.ohio.gov'. The page header includes the Ohio Department of Medicaid logo and navigation links like 'HOME', 'ABOUT', 'CONTACT', etc. The search panel contains several input fields for filtering results, such as 'Provider Type', 'MFR Tracking Number', and 'LTC Report Submission Range'. Below the search fields is a 'Search Results' table with columns for 'LTC Report Number', 'MFR Tracking Number', 'LTC Report Date', 'MFR Tracking Date', 'Status', 'MFR Tracking Status', 'LTC Report Date Range', and 'MFR Tracking Date Range'. The table contains three rows of data. Below the table is a section titled 'Please select one to show the report' with a red arrow pointing to a 'Print' button. The page footer includes the Ohio Department of Medicaid logo and contact information.

The Cost Report for this example is showing four entries. Three of the entries have been obsoleted which means that additional cost reports have been submitted due to errors being discovered and corrections have been made. Only one of the cost reports is current and this one has been cleared. By clicking on the row of the “cleared” cost report the files that have been submitted will populate next to their respective file name.

Once you have submitted your search this screen shows:

- 1) Provider ID
- 2) Cost Report Type (4.1, 4.6, etc.)
- 3) Fiscal Year
- 4) Cost report to and from date
- 5) Provider Type (NF or ICF)
- 6) Cost report submission status
- 7) Cost Report submission date
- 8) Preparer ID (should be the last person to save files when submitting the documents to the PIN Holder)
- 9) Submitter ID (PIN holder that certified the cost report to ODM or DODD)



LTC Cost Report Submission History Search Panel

The screenshot shows a web application interface for searching LTC Cost Report Submission History. At the top, there is a search panel with the following fields:

- Provider: [Text Input]
- Cost Report Year Range: [Text Input]
- Submission Status: [Dropdown Menu]
- Search: [Button]

Below the search panel is a table with the following columns:

Cost Report Year	Submission Status	Provider Name	Address	City	State	Zip	Phone	Fax	Submission Date	Submission Time	Submission User
11	Cleared	...	...	...	...	...	...	...	...	...	...
12	...	...	...	...	...	...	...	...	...	...	...
13	...	...	...	...	...	...	...	...	...	...	...

A red arrow points to the first row in the table, which has a status of "Cleared". Below the table, the details for the selected row are displayed:

- Cost Report Year: 11
- Submission Status: Cleared
- Provider Name: [Text]
- Address: [Text]
- City: [Text]
- State: [Text]
- Zip: [Text]
- Phone: [Text]
- Fax: [Text]
- Submission Date: [Text]
- Submission Time: [Text]
- Submission User: [Text]



Once you click on the appropriate row the files that have been submitted for that particular cost report period will populate. For this row the cost report submission status is denoted as "cleared" and the files associated with the cleared cost report are visible for review by the provider.



Frequently Asked Questions

- Administrative Agents for:
 - » Nursing Facilities
 - » Intermediate Care Facilities

- » This training discusses how the portal administrator assigns roles for the agent, pin holder agent and accounting firms.

http://medicaid.ohio.gov/Portals/0/Providers/ProviderTypes/LongTermCare/AutomatedCostReporting/NF_ICF-IIDNewCostReportWebinar-2017.pdf



As a reminder, the first long term care training centered on the secure portal and having the portal administrator establish rights for the agents and accounting firms. This training is located at the web address noted in the slide. Just copy the web address and place in your browser.



Frequently Asked Questions

For assistance with the MITS Web Portal contact the
ODM Provider Call center: **1-800-686-1516**

For User ID and Password Resets, send an email to:
MITSAccessSupport@jfs.ohio.gov

Trouble shooting and common mistakes help sheet:
[http://www.medicaid.ohio.gov/Portals/0/Providers/MITS/Information%20Releases/August%202011/MITS Registration Troubleshooting Guide.pdf](http://www.medicaid.ohio.gov/Portals/0/Providers/MITS/Information%20Releases/August%202011/MITS%20Registration%20Troubleshooting%20Guide.pdf)



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Trouble shooting and common mistakes help sheet can be found at the following web address. Click on the address to go to the help sheet



Frequently Asked Questions

Contact Information

For assistance with submitting Cost Reports through the MITS Web Portal contact the following areas:

Nursing Facilities

send an email to: nursing.home.correspondent@medicaid.ohio.gov or

Call: Lisa Bowman @ 614.752.3004 / Emerall Young @ 614.752.3708

Intermediate Care Facilities

Send an e-mail to: cr-icf@dodd.ohio.gov or

Call: Ashley McKinney @ 614.644.7596

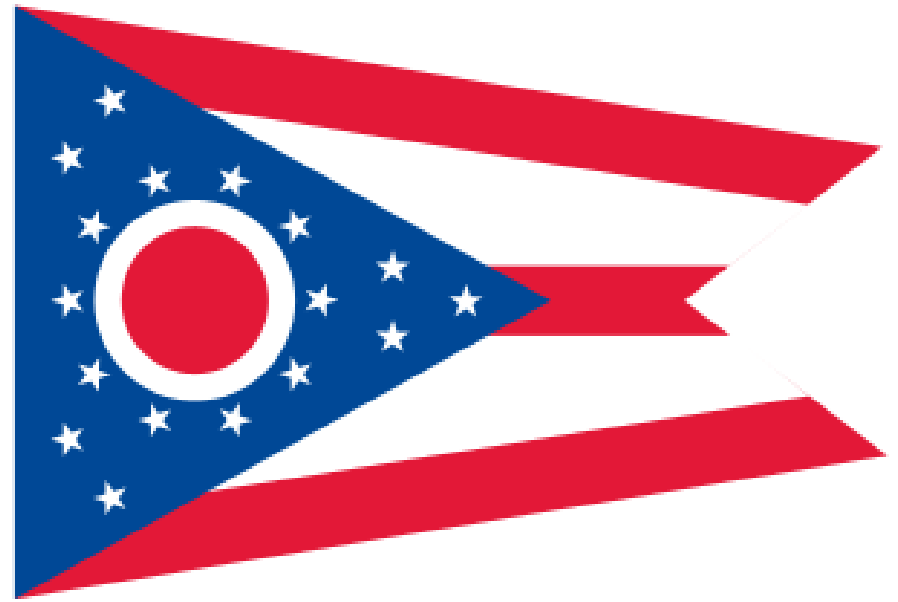


For questions or assistance with submitting cost reports through the MITS portal please e-mail or call the following individuals:

For nursing facilities please e-mail nursing.home.correspondent@Medicaid.ohio.gov or call Lisa Bowman at (614) 752-3004 or Emerall Young at (614) 752.3708.

For intermediate care facilities please e-mail cr-icf@dodd.ohio.gov or call Ashley McKinney at (614) 644-7596.

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OHIO
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Thank you for being part of the team that is Making Ohio Better