



INSTRUCTIONS FOR COMPLETING THE PARTICIPANT ROSTER

We are pleased that you are participating in the Mental Health Funds Recovery Program. This program continues to bring significant revenue to your agency. The purpose of this correspondence is to request an updated roster of staff that perform Medicaid administrative or outreach activities.

If you have any questions regarding this process or are unable to use the file included, please call InteCare at 1-888-591-6128.

Below are the instructions for filling out the roster. A table is also included to help decide which people should be participants. We request that the updated roster be completed no later than **Friday July 31st , 2026.**

InteCare Time Study and Roster Management Application User Guide

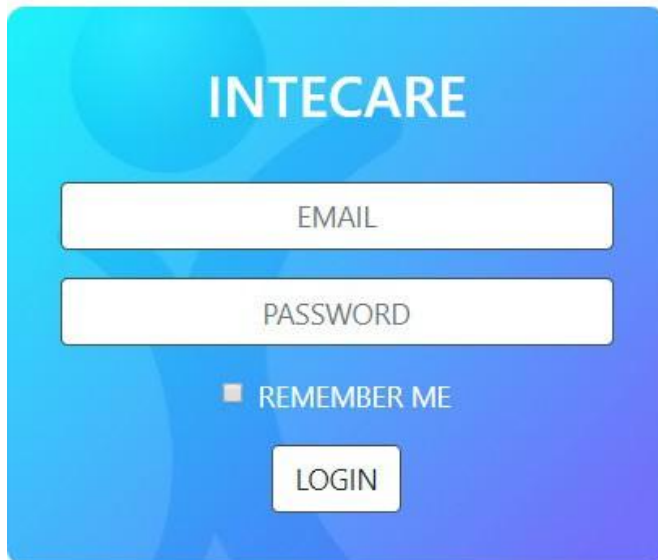
Table of Contents

<i>Accessing the Application</i>	3
<i>Roster Management</i>	3-5
<i>Add/Deactivate Roster Batch</i>	6-8
<i>Example of Job Classifications</i>	9-10
<i>Roster Certification Statement Form</i>	11

Accessing the Application

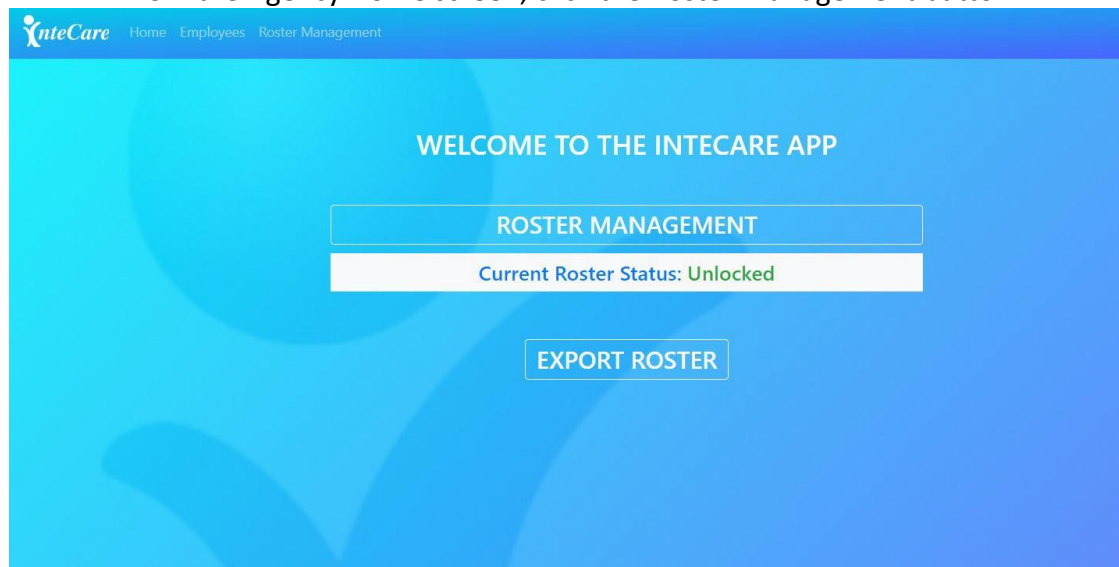
Log In at <http://intecareapp.com>

Enter the provided user credentials and click the Login button

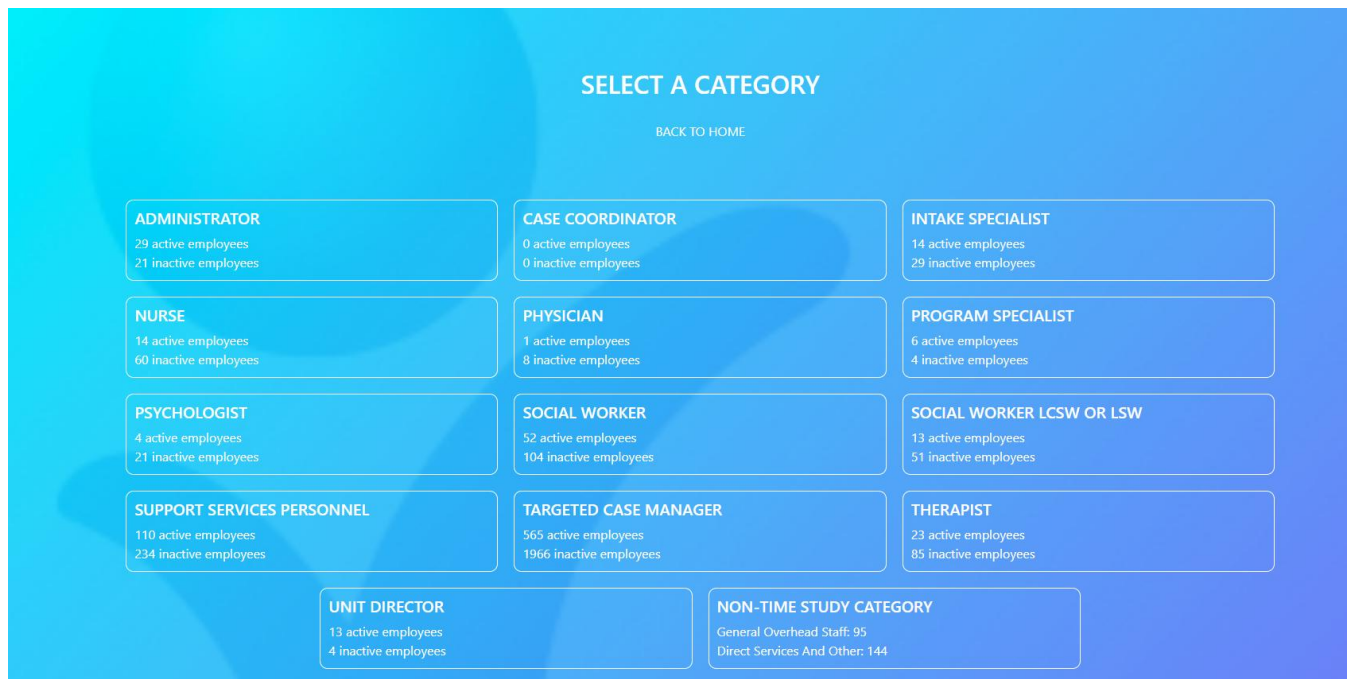
The login form is displayed on a blue gradient background with abstract circular patterns. It features the 'INTECARE' logo at the top. Below the logo are two white input fields: the first is labeled 'EMAIL' and the second is labeled 'PASSWORD'. Under the password field is a checkbox labeled 'REMEMBER ME'. At the bottom of the form is a white button labeled 'LOGIN'.

Roster Management via Roster Management Tab

1. From the Agency Home screen, click the Roster Management button

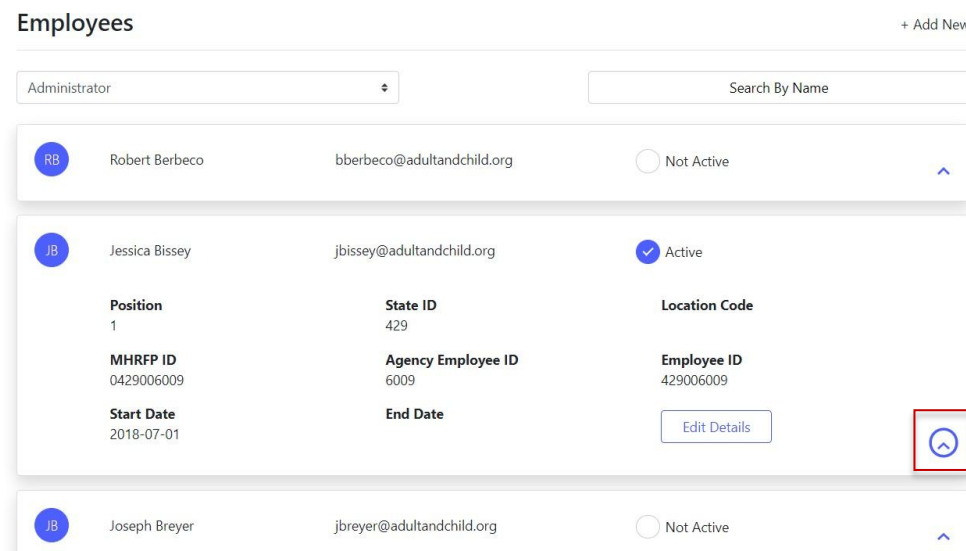
The screenshot shows the 'Roster Management' tab selected in the top navigation bar, which also includes 'Home' and 'Employees'. The main content area has a blue gradient background with the text 'WELCOME TO THE INTECARE APP'. Below this text is a white button labeled 'ROSTER MANAGEMENT'. Directly beneath the button is a white box containing the text 'Current Roster Status: Unlocked', where 'Unlocked' is in green. At the bottom of the screen is another white button labeled 'EXPORT ROSTER'.

- The Roster Management landing page shows a tile for each of the employee types in a given agency. Click a title to view the employees for a position.



3. Managing Employee Data

Employee data can be managed on the detail screen.



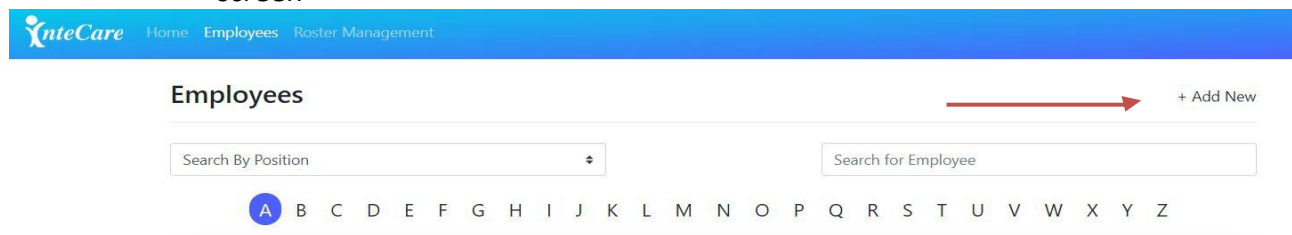
4. Managing Employee Data

Employee data can be managed on the detail screen.

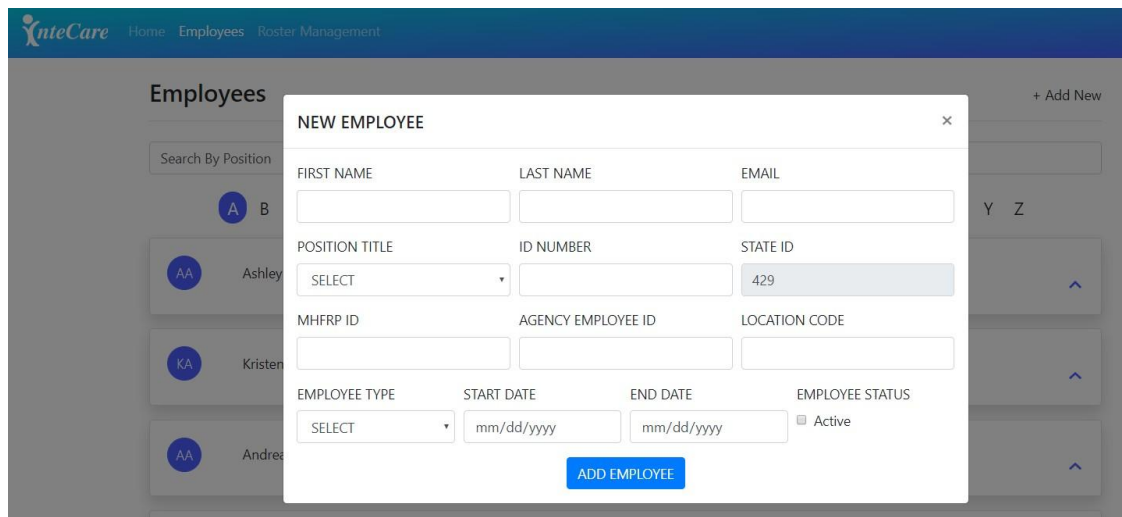
- From the Roster Management home screen, click the label for a tile.
- To make changes to an employee's position, click the drop-down arrow to the right of their name, then click "Edit Details".
- To deactivate an employee, just uncheck the Employee Status box and click Update.
- To change an employee's position title, click the drop-down arrow next to their title and select the new position. Then, press update.
- All fields can be edited except the MHFRPID & State ID.

5. Add a new employee

- To add a new employee, click the "+ Add New" from the Roster Management screen



- Complete the form (All fields can be completed (if applicable) except MHFRPID & State ID).



Roster Management via Batch Upload

Log In at <http://intecareapp.com>

Enter the provided user credentials and click the Login button

1. Receive and Use the Current Template

- At the beginning of each quarter, you will receive a new Excel template.
- Always use the most recent template for roster updates.

[illegible]

2. Enter Employee Updates

- Add any new employees who need to be included.
- Include any employees who need to be deactivated.
- All updates (additions and deactivations) must be entered into the template.

3. Complete Required Fields

Action*	Email	LastName	FirstName	PositionName*	AgencyEmployee	LocationCode	EmployeeType*	Active*	StartDate	EndDate
---------	-------	----------	-----------	---------------	----------------	--------------	---------------	---------	-----------	---------

- Columns marked with an asterisk (*) are required.
- If any required field is missing or contains invalid information, that employee record will not be updated.

Action*	Email	LastName	FirstName	PositionName*	AgencyEn
Add					
Deactivate					

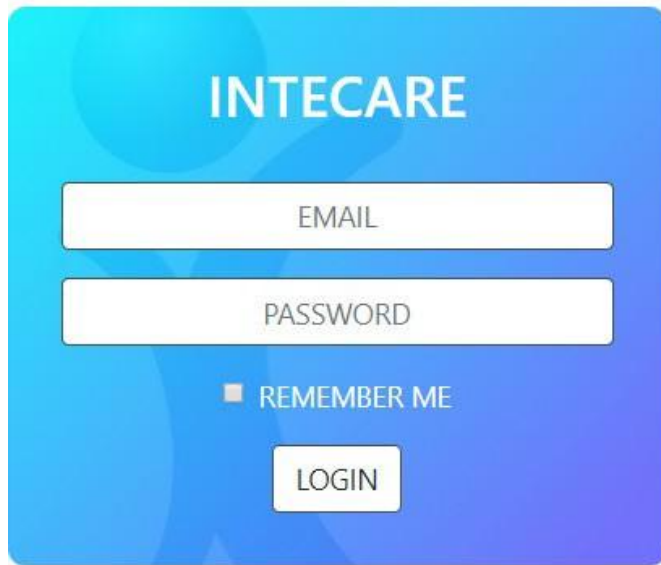
- c. All required fields include a dropdown menu to ensure accurate selections. Use the dropdown options provided.

4. Handling Position Changes

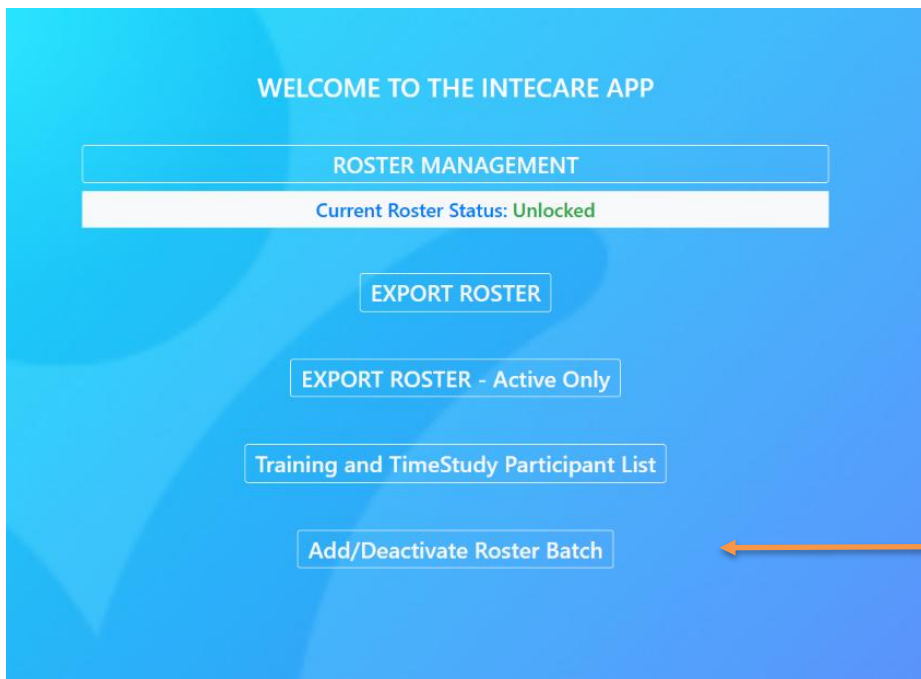
- a. If an employee changes positions:
 - 1) Deactivate the employee in their current position.
 - 2) Add the employee in their new position.
- b. In some cases, it may be easier to update position changes directly in the Roster Management section.

5. Upload the Updated Spreadsheet

- a. Save your completed Excel template.
- b. Go to **intecareapp.com** and log in.



- c. Select the **Add/Deactivate Roster Batch** tab.



- d. Click **Choose Files**.

- e. Select your saved Excel template.
- f. Click **Upload & Import**.

The screenshot shows a web interface titled "Roster Update". Below the title is a subtitle: "Select Excel files (.xls, .xlsx). They will be uploaded, parsed, and inserted into the database." There is a dashed blue box containing the text "Click here to Select Files". Inside this box is a blue button labeled "Choose Files" and the filename "ROSTER_UPDA...PLATE-test.xlsx". Below the filename, it says "Accepted: .xls, .xlsx". Below the dashed box is a solid blue button labeled "Upload & Import Files". Two orange arrows point to the "Choose Files" button and the "Upload & Import Files" button.

6. Confirm Successful Upload

- a. A green check mark and the message **"file uploaded successfully"** will appear once the file has been uploaded, parsed, and inserted correctly.

The screenshot shows the "Roster Update" interface after a successful upload. The title "Roster Update" is at the top. Below it is the subtitle: "Select Excel files (.xls, .xlsx). They will be uploaded, parsed, and inserted into the database." Below the subtitle is a light blue box with a header "Processing: ROSTER_UPDATE_TEMPLATE-test.xlsx". Inside this box, there are four lines of text, each preceded by a green checkmark: "File uploaded successfully.", "Deactivate: 0 employees deactivated.", "Deactivate: Updated 2 employees.", and "Add: Inserted 3 employees." Below these lines is a line of text: "Archived to xls_data/archive/ROSTER_UPDATE_TEMPLATE-test.xlsx". An orange arrow points to the first line of the processing status.

7. Verify Updates

Roster Update

Select Excel files (.xls, .xlsx). They will be uploaded, parsed, and inserted into the database.

 **Processing: ROSTER_UPDATE_TEMPLATE-test.xlsx**

- ✓ File uploaded successfully.
- ✓ Deactivate: 0 employees deactivated.
- ✓ Deactivate: Updated 2 employees.
- ✓ Add: Inserted 3 employees.
- ✓ Archived to xls_data/archive/ROSTER_UPDATE_TEMPLATE-test.xlsx

EXPORT ROSTER



- Confirm changes by exporting your roster and/or returning to the **Roster Management** tab

Sign and submit a Roster Certification Statement. This was included as an attachment via email when you received notification to complete the Roster. Email Gwen Tucker_ (gtucker@intecare.org) or call 1-888-591-6128 or 317-983-1763 if have questions or need another copy.

This document includes examples of categories of people who should be included in the time study sample pool. The table below defines the different categories by their various classifications to assist in identifying these staff.

Following the table are instructions on how to complete the excel spreadsheet roster listing.

Examples of Job Classifications of people to be included in the Time Study Roster

PARTICIPANT CATEGORY	EXAMPLES OF JOB CLASSIFICATIONS TO BE INCLUDED
Administrator - Provides administrative oversight, policy and resource development, inter and intra-agency quality assurance and compliance activities, planning and personnel supervision at the department organizational level.	• Program Director • Director of Operations • Clinical Director for Medical Clinic • Recruit Providers and development
Case Coordinators (unable to bill MRO) - Coordinates overall service delivery and assists clients NOT eligible for Targeted Case Management (TCM) in accessing Medicaid and Non-Medicaid services.	• Case Worker • Case Coordinator • Coordinator Forensic Services • Court Liaison
Intake Specialists – Provides information and referrals, conducts intake interviews and verifies 3rd party payment or Medicaid eligibility to clients for obtaining initial Medicaid eligibility or restoring Medicaid eligibility.	• State Hospital Liaison • Intake Coordinator/Intake Worker • Crisis Clinician • Supervisor of Crisis and Central Intake
Physicians – Provides licensed medical services as authorized under the State Medical Practice Act or regulations.	• Medical Doctor • Psychiatrist
Nurses – Provides nursing services as licensed under the State Nurse Practices Act or regulations. Individual has the designation of RN, BSN and MSN.	• Advanced Nurse Practitioner (ANP) • Registered Nurse (RN) • Licensed Practical Nurse (LPN) – must have 2 year formal training • Clinical Nurse Specialist
Psychologists – Provides licensed psychological services as defined by applicable state regulations.	• Clinical Psychologist • Psychology Intern
Program Specialists Provides general or specialized mental health or substance abuse services in a community service setting.	• Trainer • Transportation/Translation Specialist • Psychosocial Rehabilitation Clinician • Clinical Manager – Addictions Integrated Services

	• Community Liaison • Generic Clinician Category • Licensed Practical Nurse (LPN) – with less than 2 years formal training
Social Workers Provides service linking, assessment, case coordination and assists with activities for Medicaid/Non-Medical services as defined by state regulations for registered or licensed social workers.	• Psychiatric Social Worker • Addictions Social Worker • Social Worker • MSW who is non-licensed
Licensed Social Workers LCSW or LSW Provides service linking, assessment, case coordination and assists with activities for Medicaid and Non-Medical services as defined by state regulations for registered or licensed social workers.	• LCSW • LSW
Support Services Personnel – Provides general administrative functions that involve little or no supervisory activity.	• Administrative Technician • Administrative Assistant • Filing Supervisor • Receptionist
Targeted Case Manager (able to bill MRO) – Coordinates overall service delivery and assists clients eligible for Targeted Case Management (TCM) in accessing Medicaid and Non-Medicaid services.	• Clinical Case Manager • Case Manager • Case Management Supervisor
Therapists – Provides specialized diagnostic screening, prevention or corrective services, in the areas of speech, hearing, language, occupational and physical therapy.	• Occupational Therapist • Physical Therapist • Speech Therapist • LMHCs (Licensed Mental Health Counselor) • LMFTs (Licensed Marriage and Family Therapist)
Unit Directors – Provides direct service personnel oversight, as well as, supervisory and administrative activities.	• Supervise Direct Service • Program Facilitator • Clinical Program Supervisor • Coordinator of Day Therapy • Clinic Manager • Assessment Manager