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

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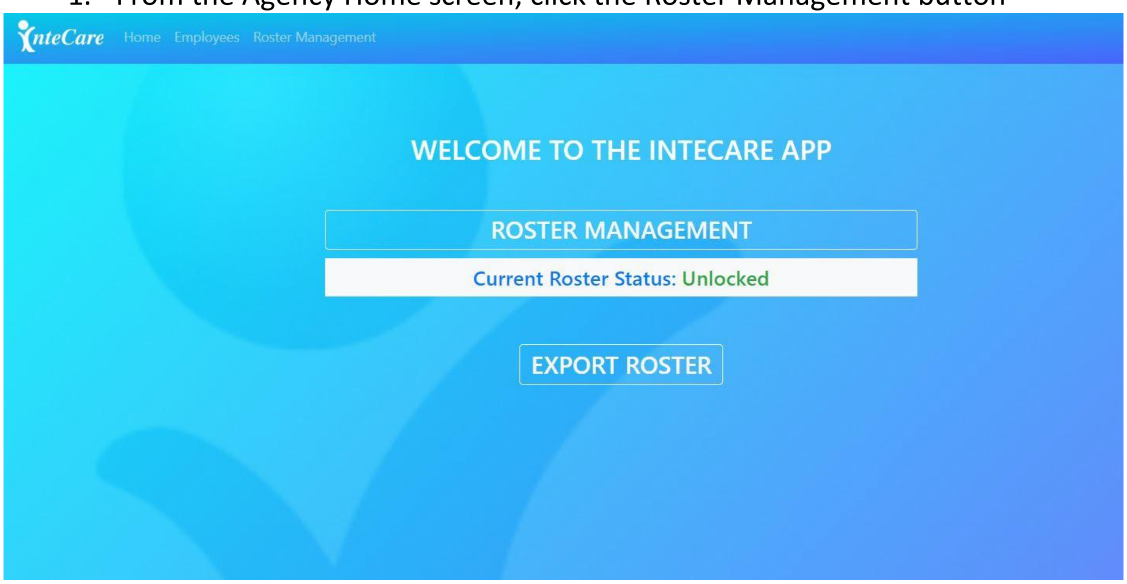
Accessing the Application

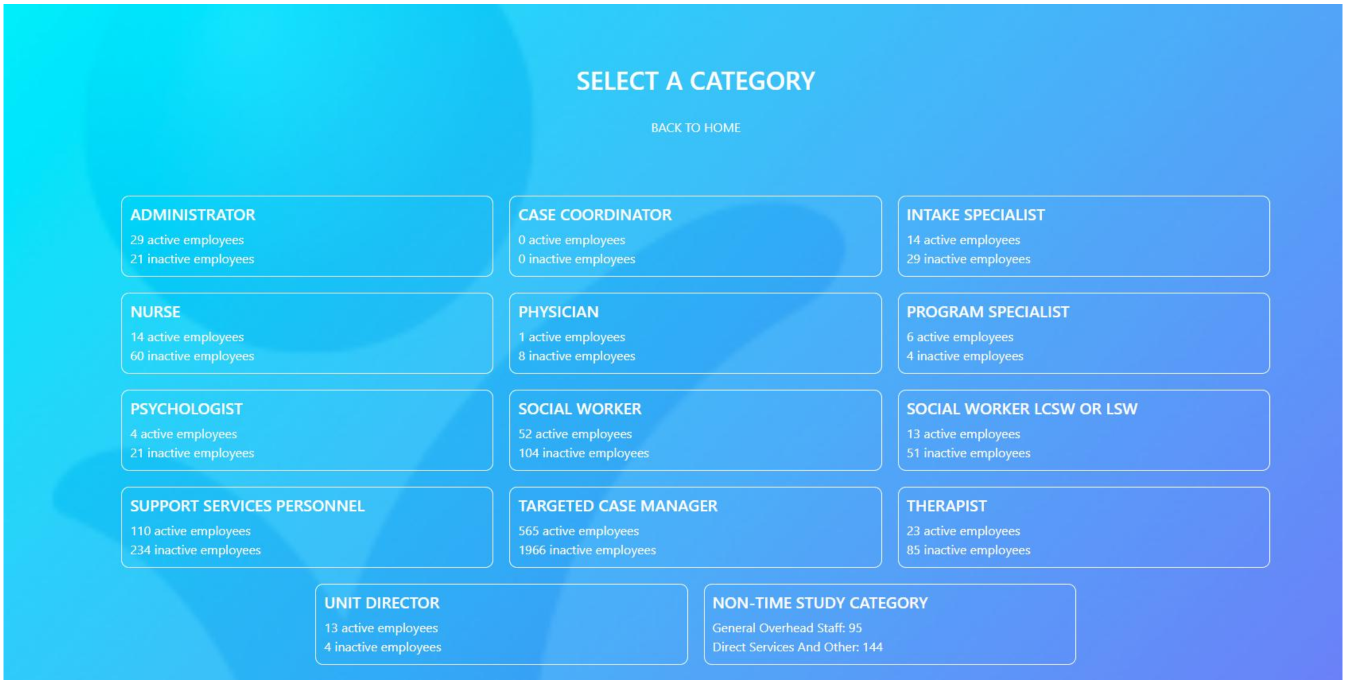
Log In at http://intecareapp.com
Enter the provided user credentials and click the Login button

Roster Management via Roster Management Tab

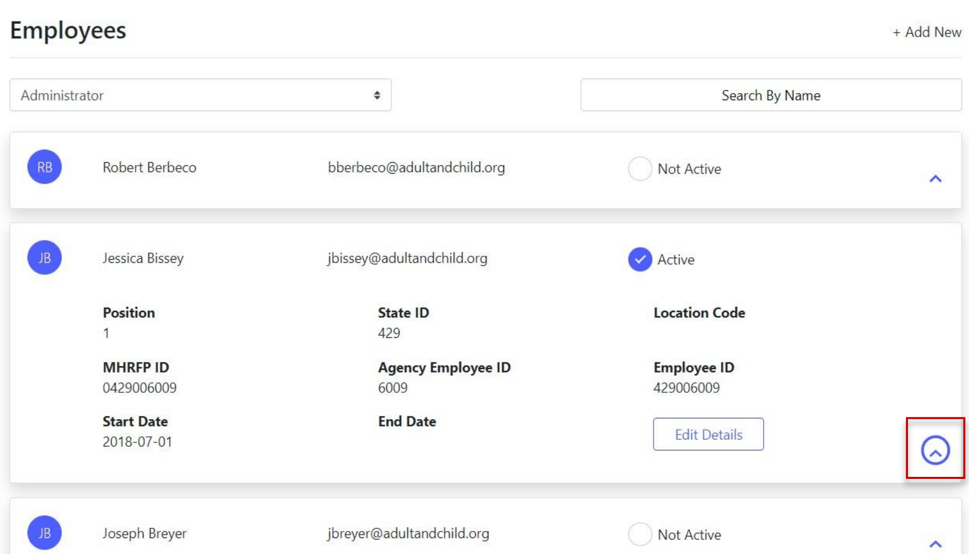
1. From the Agency Home screen, click the Roster Management button



2. 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.



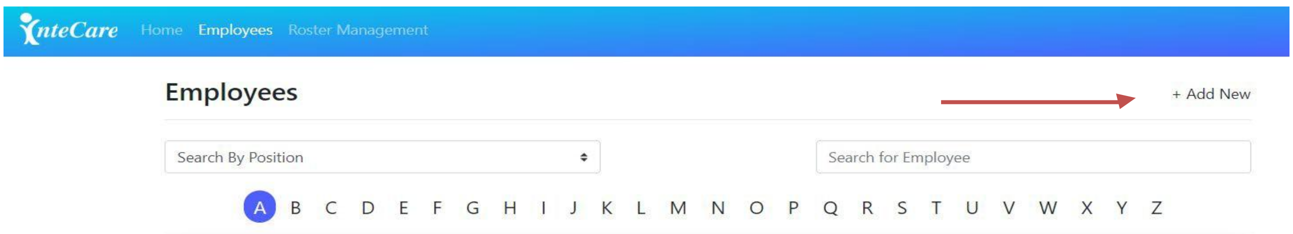
3. Managing Employee Data
   Employee data can be managed on the detail screen.



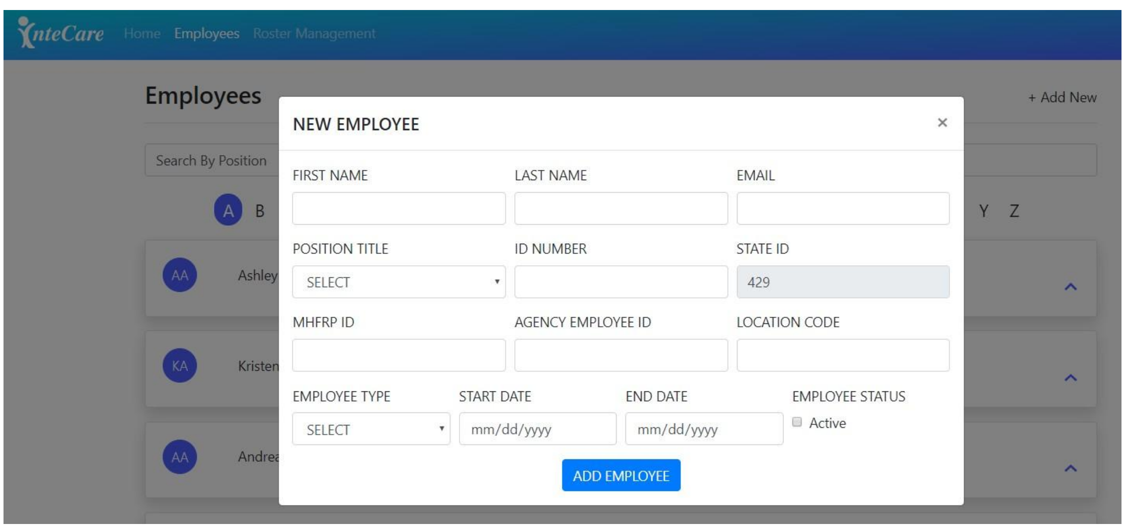
4. Managing Employee Data
   Employee data can be managed on the detail screen.

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

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



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



Roster Management via Batch Upload

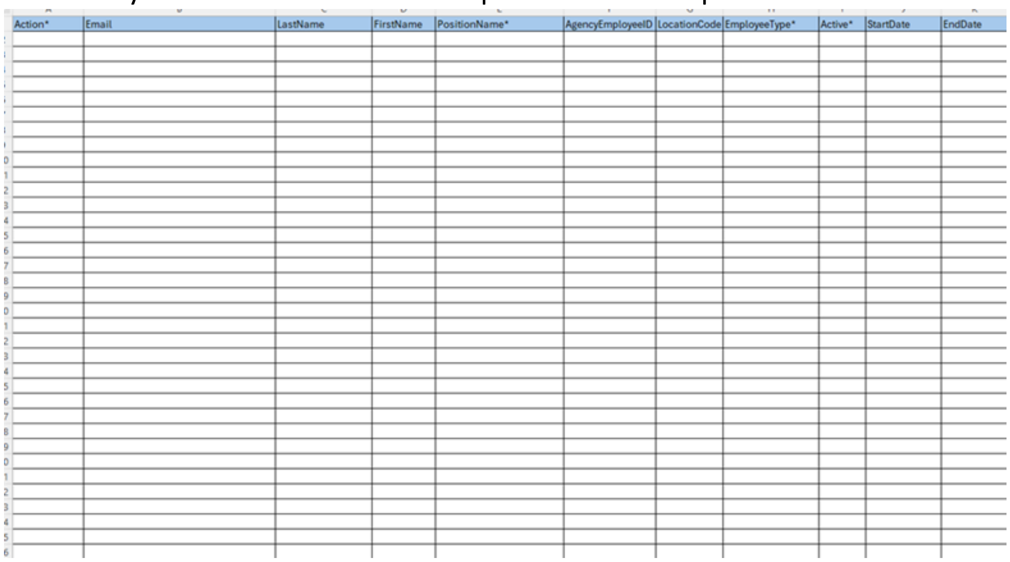
Log In at http://intecareapp.com

Enter the provided user credentials and click the Login button

1. Receive and Use the Current Template

a. At the beginning of each quarter, you will receive a new Excel template.

b. Always use the most recent template for roster updates.



2. Enter Employee Updates

a. Add any new employees who need to be included.

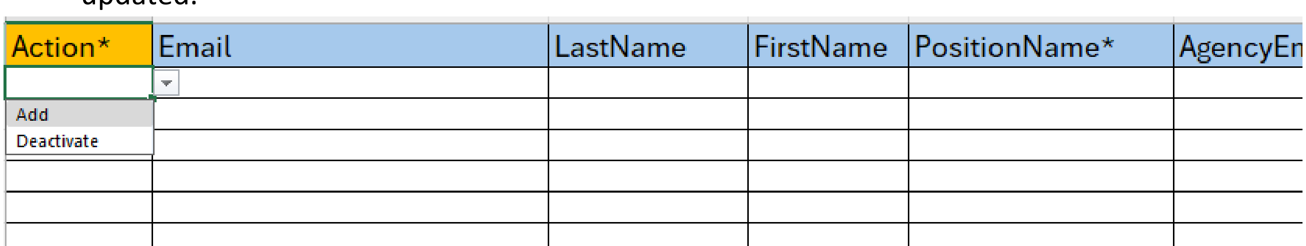
b. Include any employees who need to be deactivated.

c. All updates (additions and deactivations) must be entered into the template.

3. Complete Required Fields

a. Columns marked with an asterisk (*) are required.

b. If any required field is missing or contains invalid information, that employee record will not be updated.



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.

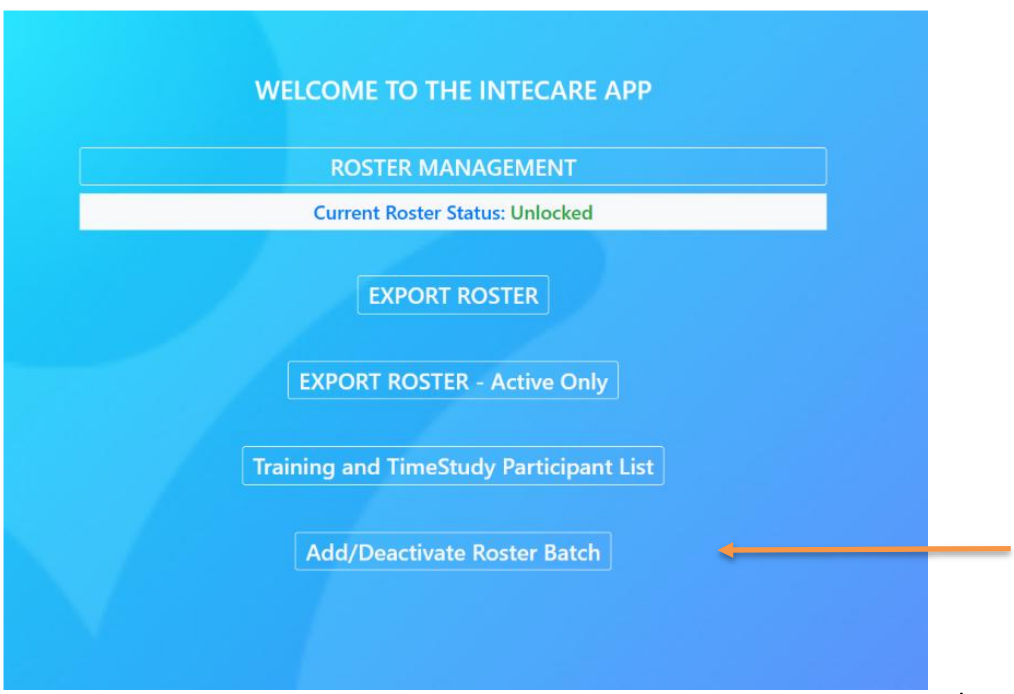
b. In some cases, it may be easier to update position changes directly in the Roster Management section.

5. Upload the Updated Spreadsheet

a. Save your completed Excel template.

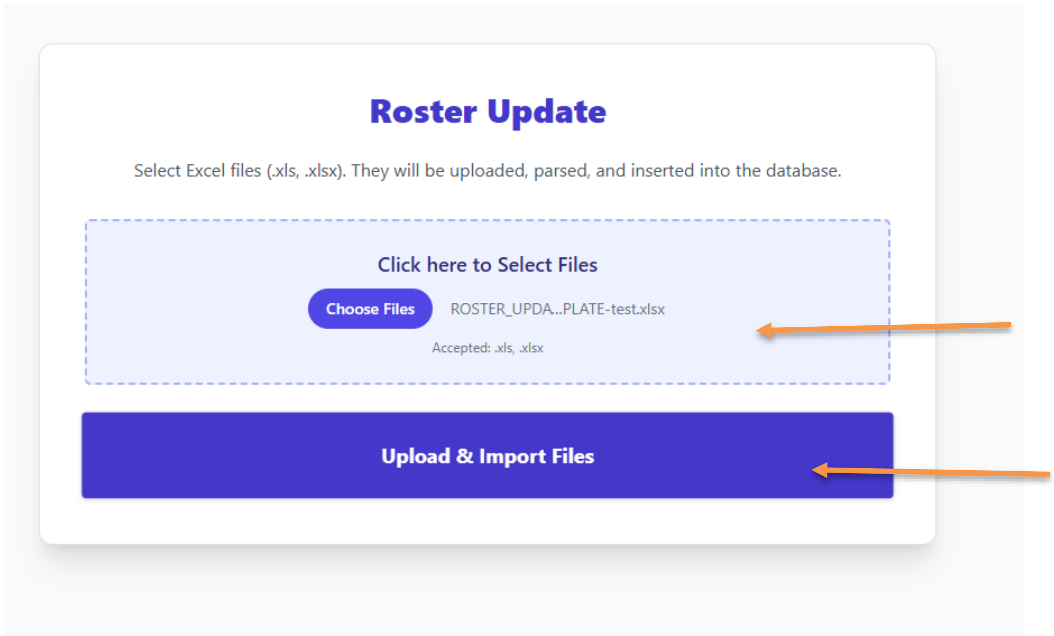
b. Go to **intecareapp.com** and log in.

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



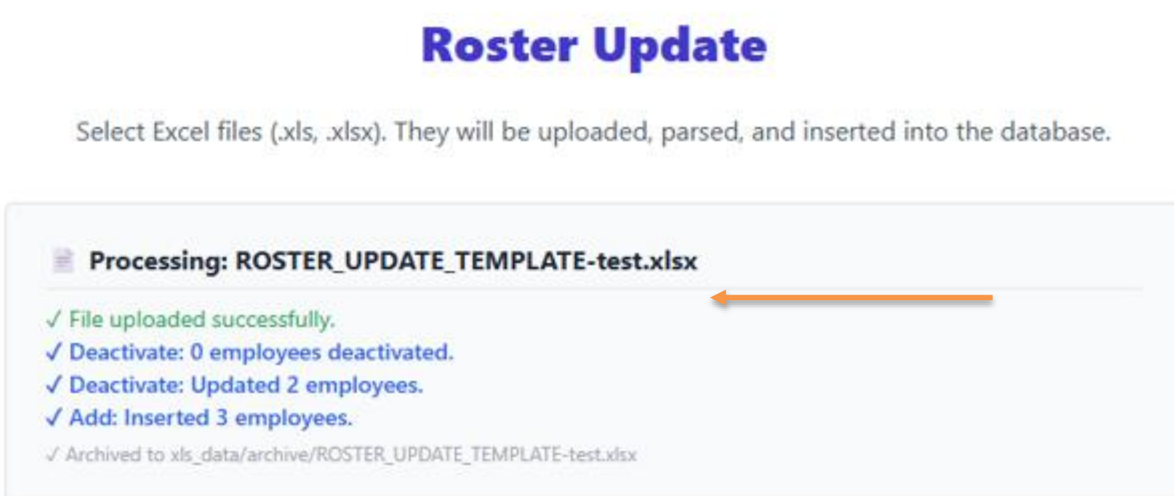
d. Click **Choose Files**.

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

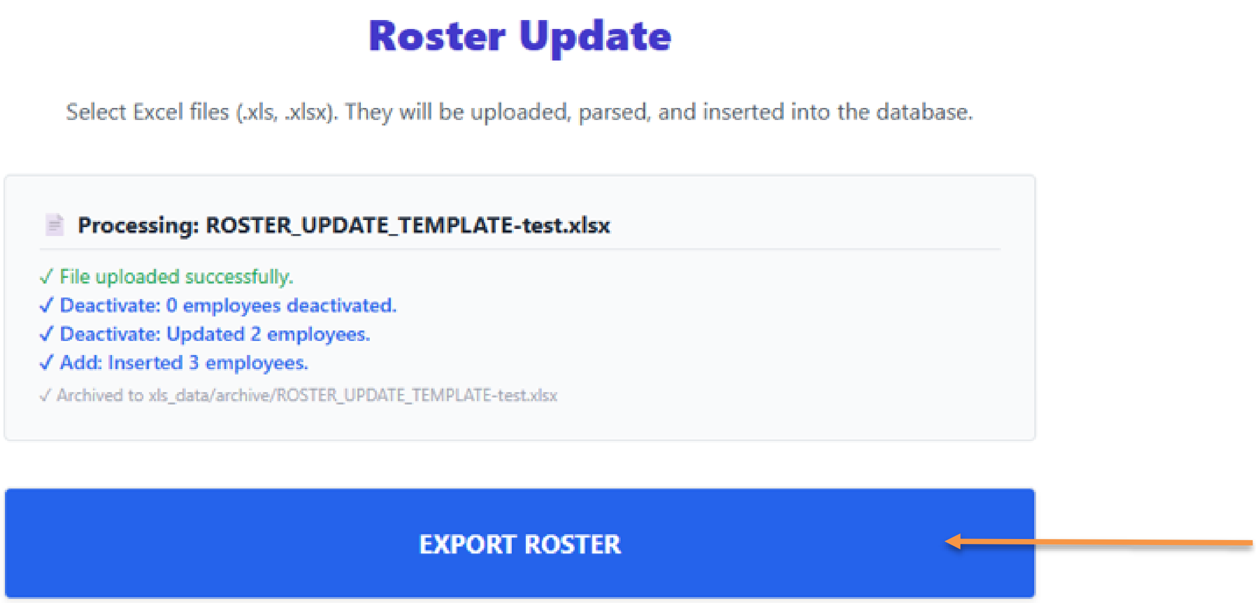


6. Confirm Successful Upload

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



7. Verify Updates



a. 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.

<u>Examples of Job Classifications of people to be included in the Time Study Roster</u>

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