

Tip Sheet on Preparing to Partner on Medicaid Matching Funding: Lessons Learned

You undoubtedly have other experiences in various types of partnerships from which to draw valuable lessons learned. But below are recommendations and lessons learned from your peers, specific to working with Medicaid on planning to apply for Medicaid matching funds.

1. **Take the time to understand the Centers for Medicare & Medicaid Services (CMS) state Medicaid program priorities, drivers, and terminology related to information systems and immunization.**

There are likely to be others in your health department who are already involved with the state Medicaid program. You may have an office within your health department or a State Health IT Coordinator who serves as the actual liaison to Medicaid. Work with your immunization program manager and other health department leaders to seek out these individuals and ask for guidance. Another key source of valuable information will be immunization information system (IIS) managers in other states who have successfully applied for Medicaid matching funding. States that have recently reported receiving Medicaid matching funding are Louisiana, North Dakota, and Washington.

2. **Keep the larger goals and outcomes in mind.** When getting entangled and perhaps disagreeing over the details of activities and budgets, come back to what you can all agree upon: improving the cost-effective delivery of immunization services for those enrolled in Medicaid, achieving improved quality and health outcomes. It can be easier to compromise and to keep things in perspective when you keep the larger goals and outcomes in mind.
3. **Respect and leverage one another's knowledge.** Each of the partners, which may include Medicaid, the IIS and perhaps a health information exchange, will have unique and critical knowledge and perspectives on what will make the project successful. These factors might include where barriers may be lurking or how to deal with them. "We're better together" can reflect the sentiment of better ideas emerging when different perspectives and knowledge bases come together in earnest and respectful ways.
4. **Remember that Medicaid is the expert in these planning cycles and is ultimately responsible and accountable for what gets submitted and is funded.** Preparing and submitting the required Advance Planning Documents (APD) is a big part of what your Medicaid program does, having years of collective experience in working with CMS and the process. An application for a 90% federal/10% state Medicaid match is an Implementation APD (IAPD), while a 75% federal/25% state match application is an Operational APD (OAPD). Acknowledge and respect the Medicaid program's expertise, even as you bring your own expertise in immunizations, information exchange, and working with providers to the table.
5. **Be prepared to have only a limited view into the APD process as a whole** since the state Medicaid program is the primary entity leading the APD process. You may have been asked to provide information on your programs, but not always given the context or full vision of how the pieces of the APD fit together, or exactly what Medicaid would be evaluating in making their determination to submit a request for funds.
6. **Don't be surprised if the Medicaid program does not fully understand the work of your IIS or of public health generally.** This may be more likely if you are in separate agencies. This is part of why describing IIS functions in terms that resonate with Medicaid can be so important.

7. **Be prepared for phasing in and ramping up your activities under this program.** If this is a new collaboration, Medicaid may want to start slowly to ensure you are a reliable partner over time (remember, they are accountable for this funding). There may be other reasons to start slow, including challenges finding the non-federal matching dollars, going through a system/platform migration, or other reasons. You can add additional activities, staff and/or equipment purchases in subsequent years as your familiarity and confidence in the process and the partners grows.
8. **Realize that Medicaid matching funds represent relatively small dollar amounts for a state Medicaid agency, but a relatively large award for you in public health.** Furthermore, these funds come to Medicaid on a **reimbursement** basis. They are not grants or cooperative agreements that provide funding up front. The funds will be transferred from Medicaid to public health, which may require an inter-agency agreement for transfer of funds.
9. **Be prepared for a long approval process.** Obtaining final approval of an APD can take a significant amount of time, involving one or more rounds of CMS review and feedback. This can mean that the final approval may not come until after the start of the federal fiscal year. Be prepared to provide abundant documentation on your IIS, which you can often pull from your CDC funding request, general information fact sheets, or other documents you may have already developed.
10. **As part of the application process, you may be required to provide a contract(s), drafted up front, for contracted IIS services.** The contract(s) are to be signed as soon as funds are approved. This could include, for example, a contract amendment with your IIS vendor, with a consultant/vendor to connect with an HIE, or to connect with a web service (e.g., vaccine forecaster, data quality tool). Check to see if specific information or a template is required, as it may be different than you are used to working with.