

Response to:

Mount Diablo Unified School District

RFP# 1846

LEA Medi-Cal Claims Reimbursement Services

Mount Diablo Unified School District – Purchasing Department

Attn: Elizabeth McClanahan

2326 Bisso Lane

Concord, CA 94520

June 13, 2019

Presented by:

Medical Billing Technologies, INC.

525 W. Main Street, Suite 204

Visalia, CA 93291

559-627-6267

[www.mbt4schools.com](http://www.mbt4schools.com)

## **CONFIDENTIALITY NOTICE**

THE CONTENTS OF THIS DOCUMENT ARE CONFIDENTIAL AND PROPRIETARY TO MEDICAL BILLING TECHNOLOGIES, INC.

EMPLOYEES OF MOUNT DIABLO UNIFIED SCHOOL DISTRICT MAY USE THIS INFORMATION SOLELY FOR EVALUATION OF THIS OFFER.

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## Executive Summary

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Medical Billing Technologies, Inc. (MBT) has more than 25 years of experience in serving K-12 school districts and county offices of education throughout California with participation in the LEA Medi-Cal Direct Billing Option Program (LEA); including, serving Mount Diablo Unified School District (MDUSD) for the past 6 years. While partnering with our districts/COEs, MBT is proud to be described as a high-tech, high-touch organization. We strive to find the optimal balance of in-person and technical service for each of our clients.

Within the last 10 years, the most important tool we have offered our clients has been our industry-leading, web-based software, OptiClaim. OptiClaim has been in development since 2009 and is now successfully tracking services for over 6,000 practitioners in over 135 school districts/COEs. Because MBT is the sole proprietor of our software, we have the flexibility to customize our service and technology to best meet the needs of our clients. Based on functions requested in the RFP, MBT is prepared to offer MDUSD:

- Web-based Medi-Cal claims submission and service tracking software
- Prescription and protocol management
- Collect and process student Medi-Cal eligibility and IEP data
- Real-time reporting capabilities
- Variety of in-person and online training and support solutions
- Assistance with any reporting/invoicing required by the LEA program, including the annual CRCS report

In addition to OptiClaim, MBT's online solution suite includes OptiReports. OptiReports offers real-time information regarding billing status and detailed breakdowns of practitioner participation. MBT uses OptiReports throughout each school year to assist districts with attaining set potentials and maximizing reimbursement opportunities.

Collaboration with MBT for software and consultative services for the LEA program will allow MDUSD staff and administration to optimize funding possibilities while focusing on their 5 strategic initiatives; *"1. Academic excellence and learning. 2. Supportive family and community involvement. 3. High quality effective staff. 4. Respectful, responsive service and communication. 5. Optimal operations and infrastructure."*

Through this proposal, Medical Billing Technologies, Inc. expresses its interest in continuing to provide an exhaustive high-tech and personalized high-touch partnership with Mount Diablo Unified School District for the LEA Medi-Cal Billing Option Program. Over the past 6 years, MBT has helped MDUSD receive more than \$4,000,000 in LEA reimbursements and we continue to be committed to MDUSD in attaining the goals of:

- Optimized reimbursements
- Minimized burden on district staff
- Support in the completion the yearly CRCS report
- Confidence in program compliance

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## Identification of Proposer

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Founded in 1994, Medical Billing Technologies, Inc. has vast experience in working with both K-12 school districts/COEs and the LEA Medi-Cal Billing Option Program. MBT is a California-based firm specializing in serving clients throughout the state. This California concentration allows MBT to provide superior and timely service to meet our clients' individual needs, while giving us a level of expertise and program knowledge not exhibited by firms serving clients in multiple states.

Our service-based approach offers unprecedented support and accessibility to our clients. With Account Managers located in the Bay Area, MDUSD will experience reliable and timely responsiveness to its service needs. Our corporate headquarters are in Visalia, California.

Medical Billing Technologies, Inc.  
525 W. Main Street, Suite 204.  
Visalia, CA 93291  
Phone: (559) 627-6267

Business License Number: BLO14435  
California Secretary of State Entity Number: 2385534  
Tax ID: 75-2971865

For questions regarding MBT's response to this RFP, please contact Reid Stephens, Chief Technical Officer, by phone at (559) 901-6023 or by email [rmstephens@mbt4schools.com](mailto:rmstephens@mbt4schools.com).

As an organization, MBT continually pursues expanded opportunities to demonstrate our core values of integrity, accountability, respect, and heartfelt service in the communities and associations in which we serve. In addition to consulting with California school districts and communities to access Medi-Cal reimbursements, MBT supports and is actively involved with professional organizations that advocate for health care and student success in education. Our hope is that by assisting MDUSD optimize federal reimbursement funds, the student population will benefit from enhanced educational and healthcare services.

## MBT's Service Model

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### Experience

Founded in 1994, MBT has been involved in the evolution of the LEA program since it began in California schools. Over the past 25 years; MBT has partnered with over 135 school districts, county offices of education, community colleges, and community-based organizations to help bring Medi-Cal reimbursements to organizations and communities that need it most. Our clients can attribute to the fact that MBT is much more than just a billing consultant; we are a partner and vital part of the community. When doing business with districts, like MDUSD, our goal is to join in the effort of educating and caring for the student population you serve.

MBT's commitment to superior service motivates us to provide educational entities the tools they need to most successfully participate in the LEA program. In a time when schools were in need of a more hands-on approach, MBT hired Account Managers across the state. When the needs turned toward technology, MBT developed proprietary software to create efficiencies and lessen the burden on district staff. It is a combination of our experienced team of personalized program experts and the use of our suite of online OptiServices that allows MBT to continue to lead the industry in providing the optimal high-tech, high-touch experience for our clients.

### Customer Service

MBT is dedicated to optimizing reimbursements, minimizing burden on staff, and instilling confidence in program compliance. Our team of experts manages the entire LEA reimbursement process from start to finish, so that district staff can focus on their students.

MBT's formula for success includes:

- Generating potential reimbursement figures with district staff through an annual strategic planning meeting
- Utilizing MBT's signature high-tech, high-touch service to submit, track, and report on progress toward potentials throughout the school year
- Communicating with and training district staff via in-person and online tools to meet the needs of the district
- Seamlessly collecting and reviewing data needed for the claims submittal process
- Analyzing data to ensure optimized reimbursements and meeting potentials while maintaining program compliance
- At the end of each year, work with district staff to complete the Cost Reimbursement Comparison Schedule (CRCS) in an accurately and timely manner

Each district/COE is different; therefore, MBT understands the need to tailor the training and implementation process to meet the needs of our clients. For each of our clients, we work with the administration to determine the optimal procedures in collecting and uploading student and IEP data, conducting practitioner trainings, and offering ongoing technical and program support. Our clients will tell you MBT has been thorough and reliable throughout the initial operations and fulfill the promise of excellent collaboration.

MBT follows the same staffing practices for all of our clients. MDUSD will always have a key contact Account Manager that ensures that district personnel is adequately trained and participating in submitting claims. When necessary, MBT will provide extra software support from program experts. For example, additional technical support is often necessary during the onboarding of new practitioners for the purpose of setting up systems for collecting staff, student, and IEP data. If there are issues with accessibility to software – which are rare- MBT is happy to provide further additional accommodations.

On the backend, MBT reviews submitted claims for accuracy and completion. MBT also has a team that reviews enrollment and Medi-Cal tape matches received from the state and completes the lengthy CRCS process. While practitioners and school administration may only have contact with the Account Manager, MBT has a team of dedicated individuals ensuring each district/COE is maximizing their LEA potential and is compliant with program regulations.

### **Software System- OptiServices**

MBT began development of their OptiServices suite of applications in late 2009. OptiClaim, the application used to track school-based services and submit Medi-Cal claims, has been functional in California school districts for eight years and currently supports over 6,000 users. MBT is able to submit nearly 100,000 claims each week through OptiClaim with less than a 1% denial rate. To date, OptiClaim has performed over 50 software releases, allowing for enhanced usability and aligning with all current regulatory criteria. MBT maintains sole ownership of its software and continues to invest in development and improvements.

Within the online suite of OptiServices, clients have the ability to manage their Medi-Cal reimbursement process from beginning to end. MBT's suite of services includes: Administration, OptiClaim, File Processor, OptiReports, and OptiLearn. For most users (practitioners) only OptiClaim, File Processor, and OptiLearn will be available for them to track services and gain access to training tools. Administration and OptiReports are for individuals within the district with coordinator credentials. Because all subsystems are part of the OptiSuite and are maintained by MBT, there are no additional charges or licenses necessary to access the applications.

- **Administration:** This system is where user information is stored – including user emails, application roles and permissions, practitioner credentials, and status. It also can be used to view and manage student information – including Medi-Cal eligibility, occupational and physical therapy treatment plans, and IEP status. This application is reserved for district personnel designated to have coordinator credentials.
- **OptiClaim:** This system is used by practitioners to track services and submit Medi-Cal claims. OptiClaim is industry-leading software that provides efficiency and enhanced program compliance for clients. MBT submits nearly 100,000 claims each week through OptiClaim and has a Medi-Cal denial rate of less than 1%.
- **File Processor:** Practitioners can upload Excel spreadsheets or scanned documents into this secure application for billing purposes. File Processor is also where district administration will upload student enrollment files, IEP lists, and student transportation logs. The file storage system uses industry standard encryption for secure storage and logs all user access to files to assure HIPAA/FERPA compliance.
- **OptiReports:** This system allows district administration real-time status updates and statistical measurements of the district's performance. OptiReports is a vital tool to optimizing practitioner participation and Medi-Cal reimbursements to districts.
- **OptiLearn:** This system hosts MBT's e-classroom environment. All the handouts and guides used in trainings, along with instructional videos, are available 24 hours a day. Users can find information regarding LEA program requirements and OptiClaim tutorials.

OptiServices applications are all web-based and do require an internet connection. MBT hosts, manages, and maintains all aspects of the software suite at no additional cost to MDUSD. Users of the system will need a current version of either Google Chrome, Mozilla Fire Fox, Apple Safari or Microsoft Internet Explorer.

Screen shots of MBT's OptiServices applications are attached as an addendum.

## Software Support

As questions and challenges arise, there is no doubt that MDUSD's users will need quick answers. MBT accommodates four levels of technical support:

- In-person training/workgroup: Live trainings are an essential component to MBT's implementation process; however, MBT also provides ongoing in-person technical and program support when desired. These sessions are often necessary and helpful when new district staff are hired or there are significant changes to LEA program regulations. In-person training and workgroups are available to clients at no additional charge.
- Live Chat: The ability to chat with an MBT employee is available through our website and OptiSuite portal. Clients have access to Live Chat from 7:00am – 4:30pm PST. Live Chat is the easiest and most convenient way for users to get instantaneous answers and/or assistance.
- Telephone: District personnel will have access to MDUSD's Account Manager's direct line and MBT's helpline. Telephone help is available from 7:00am – 4:30pm PST.
- Email: If a question is not urgent, users can email [support@mbt4schools.com](mailto:support@mbt4schools.com) to get an answer within 24 hours.

All support services are included in the flat fee detailed in the "Cost" section. There is no additional charge for ongoing support.

## Quality Control

MBT has implemented several procedures to ensure quality control across many of our business departments.

- Customer Service: MBT staff meets regularly to discuss program changes and updates so we can provide the most current information pertaining to the LEA program to our clients. Account Managers are encouraged to meet with their assigned school districts/COEs as often as needed to ensure LEA Coordinators and Practitioners are properly trained.
- Software Development: MBT works to stay updated with the LEA program changes. Along with software updates to enhance user experience, regulatory updates are implemented in the applications quickly to allow our users to stay compliant with mandates. It is MBT's goal to create an online suite of services that streamlines the Medi-Cal reimbursement process from the user perspective and is always up to date with state and federal regulations.
- Security: Data security is of utmost importance to MBT. Several security layers are employed to protect client data:
  - Physical servers, hosted at Amazon Web Services data warehouse, are protected by security personnel
  - Web access to the production database and servers that host MBT's OptiSuite of applications is firmly protected with only a small number of software engineers holding applicable credentials
  - Communication within the OptiSuite applications is secure with HTTPS/SSL
  - Student data (first name, last name, and date of birth) is encrypted. In the event of a data leak, student identification information could not be distinguished
- Program Compliance: MBT provides comprehensive training and support that will assist MDUSD in identifying and compiling supporting documentation required to promote program compliance. A review checklist is provided so that the district can ensure the proper documentation is stored in the event of a DHCS LEA audit.

MBT has many procedures in place to ensure quality control for all of our clients.



## References

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Below are 5 client references with similar size and demographics as MDUSD; and, a complete list of MBT's clients has been included as an addendum.

Anaheim Elementary School District  
Leslie Coghlan  
lcoghlan@anaheimelementary.org  
714-517-7526 x4110

Corona-Noroc Unified School District  
Cecilia Arzaga-Chester  
Cchester@cnusd.k12.ca.us  
951-736-5111 x1621

Kern Union High School District  
Alan Mattlin  
Alan\_mattlin@kernhigh.org  
661-827-4800

Lake Elsinore Unified School District  
Donna Wolter  
Donna.wolter@leusd.k12.ca.us  
951-253-7051

Visalia Unified School District  
Suzie Skadan  
sskadan@visalia.k12.ca.us  
559-730-7580

## MBT's Staffing Resources

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### Leadership

MBT is a family-owned business that is dedicated to serving California students.

Roberta Stephens – Chief Executive Officer/Founder

- Roberta has been serving California schools for 26 years while providing leadership, supervision and direction to MBT staff
- BA in Public Health from California State University, Fresno
- Located at MBT's headquarters in Visalia, CA
- Roberta is available to meet with MDUSD leadership upon request

Melanie Casares – Chief Business Officer

- Melanie has been a part of the MBT team for 16 years while managing MBT's finances, human resources and client contracts
- Located at MBT's headquarters in Visalia, CA
- Melanie is available to meet with MDUSD leadership upon request

Kelly Stephens – Chief Operating Officer

- Kelly has been a part of the MBT team for 9 years while overseeing customer service, program trainings and client onboarding
- Located at MBT's headquarters in Visalia, CA
- Kelly is available to meet with MDUSD leadership upon request

Reid Stephens – Chief Technical Officer

- Reid has been a part of the MBT team for 10 years while overseeing MBT's software development, IT systems and development of new product lines
- Located at MBT's headquarters in Visalia, CA
- Reid is available to meet with MDUSD leadership upon request

### Service Team

The following individuals are program experts that will be dedicated to helping MDUSD achieve optimized reimbursements, while minimizing burden on staff, and managing program compliance.

Teri Goldwasser – Account Manager

Teri has been a part of the MBT team for 8 years. While serving MDUSD, Teri will be responsible for:

- Training administration in using the online OptiSuite of services to both enter services and manage users
- Training practitioners in using OptiClaim to submit services
- Holding annual strategic planning meetings with district administration to ensure LEA program optimization
- Meeting with district LEA program coordinators to evaluate program participation and reimbursement status

- Oversee the progress of claim capture and reimbursement amounts for the district
- Follow up with district personnel when questions arise

Lori Rettig – Claims Analyst

Lori has been a part of the MBT team for 10 years. While serving MDUSD, Lori will be responsible for:

- Checking the student Medi-Cal tape matches for MDUSD received from DHCS
- Perform claim checks to ensure all claims submitted are valid
- Submit claims on behalf of MDUSD on a weekly basis
- Reconcile all paid claims to verify the proper reimbursements are received
- Investigate all denied claims by Medi-Cal

Mirna Ramos – LEA Financial Manager

Mirna has been a part of the MBT team for 9 years. While serving MDUSD, Mirna will be responsible for:

- Collecting financial data from MDUSD in order to oversee the completion of the CRCS each year
- Oversee the MAA process in order to create accurate MAA invoices each quarter.

## MBT's Pricing

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MBT is proud to deliver a pricing solution that reflects our commitment to serve as your trusted, strategic partner that delivers unmatched business value and investment protection, while meeting MDUSD's strategic goals and objectives today, and in the future.

You will find our LEA pricing solution to be structured in compliance with applicable regulations found in 22 CCRs 51502.1 "Requirements for Electronic Claims Submission." This section of California Administrative Code states that a "biller" shall be determined to be ineligible for electronic claims submission if the biller has entered into an agreement for compensation with any provider based upon percentage or other variable related to the amount billed or collected from the Medi-Cal, Medicaid, or Medicare programs in violation of state or federal law.

MDUSD has the choice between the following two fee schedules:

**MBT is seeking an agreement for \$5,000 a month, flat fee** - this amount totals \$60,000 per calendar year. For comparison, if MDUSD collects \$800,000 per year in the LEA program, MBT's charges would equate to 7.5% of the total reimbursement.

**Or**

**MBT is seeking an agreement for \$54,000 a year, flat fee** - this amount would equate to a 10% discount compared to the monthly fee. For comparison, if MDUSD collects \$800,000 per year, MBT's charges would equate to 6.75% of the total reimbursement.

MBT's pricing solution for the LEA Medi-Cal Direct Billing Option program includes full-service support, our industry-leading software technology, as well as submission of all claims to Medi-Cal. At MDUSD's request, MBT can also assist with the following tasks that are related to the LEA program for additional fees: completion of the annual CRCS report required by Medi-Cal at the end of each billing year, collecting physician approved prescriptions that are required to bill for occupational therapy and physical therapy claims, and assistance with appealing claims that were made in error. Our formal agreement with all the pricing details explained above is included as an addendum.

MBT's pricing offers Mount Diablo Unified School District a combination of unmatched value and alignment with the LEA program regulations.

## MDUSD's RFP Forms

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### RFP #1846 LEA Medi-Cal Reimbursement Services PRICE PROPOSAL FORM

Board of Education  
Mt. Diablo Unified School District  
Concord, CA 94520

The undersigned declares the Request for Proposals has been read and agrees and proposes to furnish all necessary labor, materials and equipment to provide the LEA Medi-Cal Claims including CRCS Services and complete, all in accordance with the terms, conditions, and specifications of RFP No. 1846 and will take in full payment therefore the following total lump sum amount, all taxes included:

1. The undersigned hereby certifies that this RFP is genuine and not fraudulent or collusive, or made in the interest of or in behalf of any person not herein named, and that the undersigned has not directly or indirectly induced or solicited any other Bidder to put in a fraudulent RFP, or any other person, firm or corporation to refrain from bidding, and the undersigned has not in any manner sought by collusion to secure for himself an advantage over any other Bidder. Further, the undersigned also declares under penalty of perjury under the laws of the State of California, that representations made in this RFP are true and correct.
2. The undersigned has notified the District of any discrepancies or omissions, or of any doubt about the meaning of any of the Contract Documents, and has contacted the Purchasing Department before bid date to verify the issuing of any clarifying Addenda.
3. Receipt and acceptance of the following addenda is hereby acknowledged:

No. \_\_\_\_\_, Dated \_\_\_\_\_

No. \_\_\_\_\_, Dated \_\_\_\_\_

No. \_\_\_\_\_, Dated \_\_\_\_\_

Taxpayer's Identification No. 75-2971865

The Bidder is (Check One):             Corporation  
     Partnership  
     Sole Proprietorship

If the Bidder is a Corporation, the bid should be signed with the name of the Corporation by an officer authorized to execute a bid on behalf of the Corporation. This Corporation is organized and existing under and by virtues of the Laws of the State of California.

Federal Tax ID Number: 75-2971865.

If the Bidder is a Partnership, the bid should be signed with the name of the partnership by one of the partners.

Federal Tax ID Number:

If the Bidder is unincorporated and a Sole Proprietorship, the bid should be signed with the name of the Sole Proprietor by that person.

Social Security Number:

Submitted herewith is our proposal to file actual and estimated LEA Medi-Cal reimbursement claims including CRCS for the Mt. Diablo Unified School District for the claim years ending June 30, 2020, June 30, 2021 and June 30, 2022.

Cost and Billing of Services:

Provide detailed information about the cost of the services. Billing and payment procedures should be clearly defined.

If you wish to submit a fee schedule based on a sliding scale, please follow these parameters:

Fee % (based on Fiscal Year Annual Gross Amount of Reimbursement from the State		Annual Gross Amount of Reimbursement from the State
_____	for	\$1 to \$400,000
_____	for	\$400,001 to \$700,000
_____	for	\$700,001 to \$1 million
_____	for	\$1,000,001 to \$ 1,500,000
_____	for	\$1,500,001 to \$2,000,000
_____	for	over \$2 million

Time-task schedule:

Include a time-task schedule and plan showing how this time frame will be met as part of the proposal.

The services will be performed in accordance with the requirements outlined in the “REQUEST FOR PROPOSALS FOR LEA MEDI-CAL REIMBURSEMENT SERVICES” and will be performed by the personnel identified in the “Statement of Qualifications”. The firm will enter into an agreement with the Mt. Diablo Unified School District in the form submitted with this Request for Proposal.

Dated this 10th day of June, 2019

Medical Billing Technologies  
Company Name

525 West Main Street, Suite 204  
Street Address

Reid Stephens  
Authorized Person (Printed Name)

Visalia                      CA                      93291  
City                                      State                      Zip

President - Business Operations  
Title

*Reid Stephens*  
Signature

559-901-6023  
Phone Number

559-627-1022  
Fax Number

Email Address rmstephens@mbt4schools.com

**MT. DIABLO UNIFIED SCHOOL DISTRICT  
STATEMENT OF QUALIFICATIONS**

*(Submit with proposal)*

**RFP #1846 LEA Medi-Cal Claims Reimbursement Services**

The signatory of the Statement guarantees the truth and accuracy of all statements and of answers to all questions hereinafter made. Failure to complete and return this Statement, or any false statement therein may render a bid non-responsive at the sole discretion of the Mt. Diablo Unified School District. All portions of the Statement must be completed. Contractors who do not thoroughly or accurately complete this form will be deemed non-responsive and excluded from submitting the bid.

Firm Medical Billing Technologies

Address 525 West Main Street, Suite 204, Visalia, CA, 93291

Telephone 559-901-6023

Facsimile 559-627-1022

Email rmstephens@mbt4schools.com

Submitted by: Reid Stephens

Date: June 10, 2019

(Name of individual completing statement)

**Names of personnel, with classifications, who will be assigned to the project:**

<u>NAME</u>	<u>CLASSIFICATION</u>
<u>Teri Goldwasser</u>	<u>Account Manager</u>
<u>Lori Rettig</u>	<u>Claims Analyst</u>
<u>Mirna Ramos</u>	<u>LEA Financial Manager</u>
_____	_____
_____	_____
_____	_____
_____	_____



**1. If a corporation, please answer the following:**

Date of Incorporation: June 1994  
In what state: California  
President's Name: Reid Stephens  
Vice President's Name: Kelly Stephens  
Secretary's Name: Kelly Stephens  
Treasurer's Name: Reid Stephens

**2. If a partnership, please answer the following:**

Date of Organization: \_\_\_\_\_  
General or association? \_\_\_\_\_

Name and Address of each general partner

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

3. Number of years in business under this name: 25

4. Number of years in business under other names: 0

Name	Years
• _____	_____
• _____	_____
• _____	_____

5. How many years experience in performing type of work called for in this RFP? 25

6. In what other lines of business do you or your organization or any partner thereof have financial interests? None

7. Have you or your organization, or any office or partner thereof, failed to complete a contract?  
 Yes ( ) No ( X )
8. Has your organization been assessed any penalties for non-compliance violations of the Federal or State Labor laws and/or regulations within the last five (5) years?  
 Yes ( ) No ( X )
9. Does your organization have any outstanding judgments, demands or liens resulting from violating the State Labor Code, the Business and Professions Code, Civil or Criminal decisions?  
 Yes ( ) No ( X )

***Please explain all questions answered "yes" in questions nine (8) and nine (9) above on a separate sheet of paper along with this Statement.***

10. List five (5) references where work comparable to that called for on the bid has been performed:

- A. School District Anaheim Elementary School District  
 Address 1001 South East St, Anaheim CA 92805  
 Telephone Number 714-517-7526  
 Contact Person Leslie Coghlan  
 Date of Work June 2011 - Present  
 Contract Award LEA Medi-Cal Billing
- B. School District Corona-Norco Unified School District  
 Address 2820 Clark Ave, Norco CA 92860  
 Telephone Number 951-736-5111  
 Contact Person Cecilia Arzaga-Chester  
 Date of Work June 2012 - Present  
 Contract Award LEA Medi-Cal Billing
- C. School District Kern Union High School District  
 Address 5801 Sundale Ave, Bakersfield CA 93309  
 Telephone Number 661-827-4800  
 Contact Person Alan Mattlin  
 Date of Work June 2001 - Present  
 Contract Award LEA Medi-Cal Billing

D. School District Lake Elsinore Unified School District  
Address 545 Chaney St, Lake Elsinore CA 92530  
Telephone Number 951-253-7051  
Contact Person Donna Wolter  
Date of Work June 2002 - Present  
Contract Award LEA Medi-Cal Billing

E. School District Visalia Unified School District  
Address 5000 West Cypress Ave, Visalia CA 93277  
Telephone Number 559-730-7580  
Contact Person Suzie Skadan  
Date of Work June 2010 - Present  
Contract Award LEA Medi-Cal Billing

Signed Reid Stephens Date June 10, 2019

*END OF DOCUMENT*

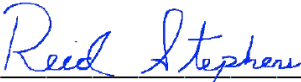
**WORKERS' COMPENSATION INSURANCE CERTIFICATE**  
**RFP #1846**  
*(Submit with proposal)*

TO: THE MT. DIABLO UNIFIED SCHOOL DISTRICT

I am aware of the provisions of Section 3700 of the Labor Code that requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code. I will comply with such provisions before commencing the performance of the work under this contract and submit the necessary evidence of workers' compensation to Mt. Diablo Unified School District.

Company: Medical Billing Technologies Inc.

Business Address: 525 West Main Street, Visalia CA 93291

Signature: 

Name of Signing Official: Reid Stephens

Title of Signing Official: President- Business Operations

Date: June 10, 2019

Company Seal:

**CONFIDENTIALITY AGREEMENT**

**RFP #1846**

*(Submit with proposal)*

The undersigned, a duly authorized officer of Medical Billing Technologies Inc. does hereby represent, warrant and agree to the following statement:

*"All financial, statistical, personal, technical or other information relating to the District's operation which are designated confidential by the District and made available to the undersigned shall be protected by the undersigned from unauthorized use and disclosure"*

Date: June 10, 2019

Firm Name: Medical Billing Technologies, Inc.

By: Reid Stephens  
Signature of Authorized Officer

**VENDOR REPRESENTATION AND CERTIFICATION**

**RFP #1846**

*(Submit with proposal)*

The undersigned hereby affirms that:

1. He/she is a duly authorized agent of the vendor (corporate or other authorization confirmation may be requested prior to final contract execution).
2. The offer is being offered independently of any other Vendor's and is in full compliance with the collusive prohibitions of this State. The vendor certifies that no employee of its firm has discussed, or compared the proposal with any other vendor or District employee, and has not colluded with any other vendor or District employee.
3. The vendor will accept any awards made to it as a result of this solicitation if the acceptance is made within 90 calendar days after the proposal due date.

I hereby certify that I am submitting the following offer as my firm's proposal. I understand that by virtue of executing and returning with this proposal this required response form, I further certify full, complete and unconditional acceptance of the contents of this Solicitation (except as may be noted in the offer). I also agree to be bound by any and all specifications, terms and conditions, contract document, accepted offer and other documents of the Solicitation.


Submitted by: Reid Stephens

Title: President - Business Operations

Company Name: Medical Billing Technologies, Inc.

Address: 525 West Main Street, Suite 204, Visalia CA 93291

Phone: 559-901-6023 Fax: 559-627-1022

By:  Date: June 10, 2019  
Manual Signature of Agent(s)

**NON-COLLUSION DECLARATION**

**Public Contract Code § 7106**

*(TO BE EXECUTED BY BIDDER AND SUBMITTED WITH RFP)*

The undersigned declares:

I am the President- Business Operations **PRINT YOUR TITLE]**

Of Medical Billing Technologies, Inc. **[PRINT FIRM NAME].**

the party making the foregoing Contract.

The RFQ is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on the following date:

Date: June 10, 2019

Proper Name of Bidder: Medical Billing Technologies, Inc.

City, State: Visalia, CA

Signature: Reid Stephens

Print Name: Reid Stephens

Title: President- Business Operations

*END OF DOCUMENT*

## Addendum

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### MBT's LEA Billing Program Contract

#### LEA Medi-Cal Direct Billing Program OptiServices Contract

This Agreement is made this 1st day of July, 2019, between MEDICAL BILLING TECHNOLOGIES, INC, hereinafter called "MBT" and MOUNT DIABLO UNIFIED SCHOOL DISTRICT, hereinafter called "CLIENT". This Agreement states the terms and conditions under which MBT will provide services on behalf of CLIENT under the Local Education Agencies (LEA) Medi-Cal Billing Option Program.

1. **MBT Responsibilities:** MBT shall provide the following services to CLIENT:
  - a. If not already completed, MBT will assist CLIENT in completing its application with the Department of Health Care Services (DHCS) to become a Medi-Cal provider, and track progress of enrollment to activation.
  - b. Work with CLIENT's designated LEA Coordinator.
  - c. Complete analysis of CLIENT's LEA Medi-Cal Billing Option Program and conduct annual strategic planning, assisting CLIENT to incorporate best practices to optimize reimbursement opportunities.
  - d. Provide recommended billing tools and access to online claims entry application for submission of LEA Medi-Cal claims.
  - e. Upon commencement of services, and monthly thereafter, submit CLIENT's student enrollment data to Medi-Cal for purposes of Medi-Cal's determination whether the student is eligible for Medi-Cal, and provide CLIENT the results of Medi-Cal's eligibility determination.
  - f. Provide access to quarterly reports to inform CLIENT of status of achievement of strategic plan.
  - g. Assist in the development and implementation of prescriptions, protocols, and referral procedures.
  - h. Provide practitioner LEA billing training and training materials to enable CLIENT personnel and contractors to successfully complete documentation necessary for submission of LEA Medi-Cal Billing Option Program claims. In providing such training MBT does not provide legal advice but relies on guidelines published by DHCS. MBT is not responsible for any change in DHCS guidelines, changes in State or Federal laws, rules, or regulations, or any change in DHCS interpretation of State or Federal laws, rules, or regulations or its own guidelines.
  - i. As directed by CLIENT, MBT will submit CLIENT's LEA Medi-Cal Billing Option Program billing via electronic transmission within forty-five (45) business days of receipt of all necessary data from CLIENT, properly completed and certified by CLIENT.
  - j. Track and follow up with practitioners to assure claims are submitted in a timely manner in order to optimize reimbursements.
  - k. Provide assistance to CLIENT in the event of a DHCS audit. The form of such assistance shall be solely at the discretion of MBT.
  - l. Comply with federal Family Educational Rights and Privacy Act (FERPA) regulations. Standards for electronic submissions and firewalls have been instituted to block entry into the MBT server and protect against internet attacks. The MBT network server is contained in a secure data center; all unused confidential information is shredded. All MBT staff is trained in HIPAA/FERPA regulations and is required to sign a statement of confidentiality. Student information sent from MBT to CLIENT will be encrypted and password protected.
  - m. At CLIENT's request, MBT will provide Cost Reimbursement Comparison Schedule (CRCS) completion services to CLIENT in compliance with current program regulations. CLIENT shall be responsible for providing necessary fiscal reports to MBT upon request and in a timely manner, according to instructions developed by MBT.
2. **Client Responsibilities:** CLIENT shall do and perform each of the following:



- a. Register and become an authorized LEA Medi-Cal provider under the rules of the Department of Health Care Services (DHCS).
- b. Designate an LEA Program Coordinator.
- c. Provide to MBT on a quarterly basis, and more often if requested by MBT, complete district enrollment data which shall include the students' names, birth dates and gender for purposes of verifying Medi-Cal eligibility with DHCS, and all information required to bill for CLIENT any LEA Medi-Cal or other health covered student, including but not limited to a complete list of students with IEP's in place, a complete list of students with Individual Health Service plans in place, and a list of students CLIENT has determined qualify for specialized medical transportation through the LEA Medi-Cal Billing Option Program.
- d. Determine whether the services provided to students are eligible for reimbursement through the LEA Medi-Cal Billing Option Program and so advise MBT.
- e. Fully and accurately complete and submit billing using MBT's OptiClaim software or electronic upload. Billing forms must include student name, date of birth, date of service, service provided, length of service (when applicable) location of the service, and the practitioner name.
- f. Maintain all LEA Medi-Cal Billing Option Program billing documentation as required by State and Federal laws, rules, and regulations for audit purposes and for such period of time as required by State and Federal laws, rules, and regulations.
- g. Provide access by MBT staff to CLIENT'S practitioners and ensure reasonable availability of practitioners for follow up activities.
- h. Assure CLIENT administration support of practitioner participation in the LEA Medi-Cal Billing Option Program and encourage and emphasize the importance of practitioner involvement in such Program.
- i. Comply with all rules and regulations of DHCS and other applicable government agencies pertaining to providing services, recordkeeping, and retention for the LEA Medi-Cal Billing Option Program.
- j. If MBT is providing CRCS completion services to CLIENT, Client shall provide all necessary documents and records to MBT necessary to complete the CRCS within 60 days of MBT's request each year.
- k. Execute such other and further documents, including the annual report, as may be required by DHCS in order to carry out the purpose of this agreement.

3. **Payment:** CLIENT shall pay to MBT as compensation:

- A flat rate of \$5,000.00 per month, to be paid within 30 days of receipt of monthly invoice; or
- An annual lump sum of \$54,000.00, payable within 30 days of receipt of invoice (representing an annual discount of ten percent (10%).

CLIENT's payment selection shall be evidenced by the checking of the box next to the option selected above. MBT may continue to invoice for services with service dates from previous years according to that year's agreement.

The following fees will be charged for additional services provided at the specific request of CLIENT:

a. **Occupational Therapy Prescriptions, Physical Therapy Prescriptions, and Speech Protocols:**

At CLIENT's request, MBT will process any necessary physician referral for prescription for any Occupational Therapy services and Physical Therapy services that the CLIENT provides to students. CLIENT will pay MBT \$100.00 for each referral processed, whether a prescription is written or not. Rate schedule may be updated to reflect adjustments to physician rates without affecting the other terms of this contract.

At CLIENT's request, MBT will process a referral for a physician signed speech protocol in compliance with current program regulations. CLIENT will pay MBT \$500.00 for each speech

protocol processed by MBT, whether the physician approves the protocol or not. Rate schedule may be updated to reflect adjustments to physician rates without affecting the other terms of this contract.

**b. CRCS Completion Services:**

If CLIENT elects to have MBT provide CRCS completion services to CLIENT, CLIENT shall pay to MBT \$50.00 per practitioner included in the report, but not less than \$250.00 and not more than \$5,000.00 for the completion of each annual CRCS report.

If recalculation of CRCS is required, CLIENT shall pay to MBT \$25.00 per practitioner included in the recalculated report, but not less than \$125.00 and not more than \$2,500.00 for the completion of the recalculated CRCS report.

If MBT is not the sole biller for CLIENT and CLIENT elects to have MBT provide CRCS completion services to CLIENT, CLIENT shall pay to MBT \$75.00 per practitioner included in the report, but not less than \$500.00 and not more than \$10,000.00 for the completion of each annual CRCS report.

**c. Changes After Submission of Billing:**

If CLIENT or CLIENT's providers request changes after MBT's **initial** submission of LEA Medi-Cal Billing Option Program billings, at CLIENT's request MBT shall prepare and submit the Claims Inquiry Form ("CIF") to DHCS to process such change. Because submission of the CIF is labor-intensive, CLIENT shall pay to MBT Ten Dollars (\$10.00) per claim submitted. No fee will be charged where the change requested is due to an error on the part of MBT.

4. **Late Fees:** CLIENT agrees to pay all sums due MBT under this contract within 30 calendar days of receipt of an invoice for services from MBT.

CLIENT will incur a late fee of one and one-half percent (1.5%) per month on amounts unpaid for more than sixty (60) days past the date of invoice.

CLIENT shall, upon request, provide to MBT a copy of all documents and checks received from DHCS evidencing all sums received as a result of the services of MBT. CLIENT shall make all such records available to MBT at reasonable times. MBT shall have the right to audit the records of CLIENT pertaining to LEA Medi-Cal billing.

5. **Document Management:** MBT shall retain in electronic form copies of all LEA Medi-Cal Billing Option bills submitted for CLIENT for a period of five (5) years after the date of submission or such other period as required by law. MBT, upon request, will provide to CLIENT printed copies of such bills. MBT, upon request, shall return to CLIENT all billing forms and other documents provided to MBT for billing purposes. CLIENT shall reimburse MBT for the cost of all containers and for the cost of packing and shipping such documents and records. CLIENT shall retain all such documents and records for at least five (5) years from the date of service or such other duration as may be required by State and Federal laws, rules, and regulations.
6. **Confidentiality Agreement:** All statistical, financial, student and other data relating to the LEA Medi-Cal Billing Option Program billing and the identity of Medi-Cal eligible students shall be held in strict confidence by the parties hereto. The foregoing obligation does not apply to any data that has become publicly available or that is not required to be kept confidential.

The data provided to MBT by the CLIENT will be used for the sole purpose of performing billing for the LEA Medi-Cal Billing Option Program. MBT is responsible to abide by The Health Insurance Portability and Accountability Act (HIPAA) and The Family Educational Rights and Privacy Act (FERPA) and will not share the CLIENT's data with third-party entities except as permitted and required for the LEA Medi-Cal Billing Option Program.

7. **Limitation of Liability:** MBT will use due care in processing the work of the CLIENT based on CLIENT's submission of billing information and CLIENT's determination of eligibility for reimbursement by the LEA Medi-Cal Billing Option Program. MBT will be responsible for correcting any errors which are due to the machines, operators, or programmers of MBT. Such errors shall be corrected at no additional charge to CLIENT. MBT does not guarantee State or Federal approval of billings submitted, and MBT shall not be liable or responsible to CLIENT for DHCS interpretation of State and Federal laws, rules, and regulations, or for changes to State and Federal laws, rules, and regulations, or for claims that are questioned or denied by DHCS or any other State or Federal governmental agency. MBT shall have no liability for CLIENT's inability to provide proper source documentation, including but not limited to Provider records, IEPs, Health Service Plans, and other supporting documentation, to DHCS or any other State or Federal governmental agency.

In no event shall MBT's liability for any and all claims against MBT under this Agreement, in contract, tort, or otherwise, exceed the total amount of the fees paid by CLIENT to MBT during the contract term in issue, and MBT shall not be liable under any circumstances for any special, consequential, incidental, punitive, or exemplary damages arising out of or in any way connected with this Agreement.

8. **Contract Duration and Termination:** The term of this Agreement shall commence upon execution of this contract and continue for a period of three (3) school years, through June 30, 2022 ("Termination Date"). CLIENT's access to MBT's OptiClaim software shall cease upon termination or nonrenewal of this Agreement except as specifically set forth herein.

This Agreement may also be terminated at any time upon mutual agreement of the parties. In addition, the Agreement shall automatically terminate if CLIENT's participation in the LEA Medi-Cal Billing Program terminates. In the event of termination prior to the completion of any school year, MBT shall not be required to provide CRCS completion services to CLIENT for the school year in progress.

9. **Submittals after Termination:** MBT shall, for a period of up to six months after the end of the school year in progress on the date of termination, continue to accept submittals from CLIENT for services provided by CLIENT through the end of the school year in progress on the date of termination, and shall submit billings for such services provided by CLIENT to DHCS for reimbursement. During the period set forth herein CLIENT shall have continued access to MBT's OptiClaim software. MBT shall continue to submit invoices to CLIENT for such billings per the payment schedule set forth in Section 3 above. Any submittals received by MBT from CLIENT for services provided in the school year following the date of termination shall be returned to CLIENT and shall not be processed by MBT for reimbursement.

10. **Notices:** Notices affecting contract terms between the parties shall be in writing and shall be deemed given when (i) personally delivered to the party to whom it is directed; or (ii) five (5) days after deposit in the United States mail, postage prepaid, return receipt requested, addressed to:

MBT  
Medical Billing Technologies, Inc.  
Attn: Reid Stephens, President  
P.O. Box 709  
Visalia, CA. 93279

CLIENT  
Mount Diablo Unified School District  
1936 Carlotta Dr.  
Concord, CA 94519

11. **Copyrights:** CLIENT acknowledges and agrees that all manuals and forms ("MBT Documents") provided to CLIENT by MBT shall remain the property of MBT and shall not be duplicated, copied in any manner and access to MBT Documents shall be restricted to employees of CLIENT who need to use MBT Documents in order to satisfy CLIENT'S obligations under this agreement, without the prior written consent of MBT. All computer programs and materials, including, but not limited to, electronic devices, and the information contained therein are, and shall remain, the property of MBT.

12. **Software as a Service Agreement:** CLIENT represents and agrees it has carefully examined and understands the Master Subscription Agreement for OptiClaim Software as a Service attached hereto and incorporated herein. MBT and CLIENT agree to be bound by each and all of the terms and provisions of the Master Subscription Agreement for OptiClaim Software.
13. **Other Documents:** The parties hereto agree to execute such other and further documents as may be necessary or required by the DHCS to authorize MBT to perform billing services on behalf of CLIENT.
14. **Entire Agreement:** This Agreement supersedes any and all other agreements, either oral or in writing, between the parties with respect to MBT providing LEA Medi-Cal billing services to CLIENT and contains all of the covenants and agreements between the parties with respect to such billing services. Each party to this agreement acknowledges that no representations, inducements, promises, or agreements, orally or otherwise, have been made by any party, or anyone acting on behalf of any party, which are not embodied herein, and that no other agreement, statement, or promise with respect to MBT billing services not contained in this agreement shall be valid or binding.
15. **Modification:** This Agreement may be amended or modified at any time with respect to any provision by a written instrument executed by all parties.
16. **Law Governing Agreement:** This Agreement shall be governed by and construed in accordance with the laws of the State of California.
17. **Mediation and Arbitration:** Any dispute arising under this Agreement shall first be addressed through mediation. If a dispute arises, either party may demand mediation by filing a written demand with the other party. If the parties cannot agree upon a neutral mediator, each party, within twenty (20) days after the parties fail to agree on one mediator, at its own cost shall appoint one mediator and those mediators shall select an impartial mediator to conduct the mediation. The parties shall equally share the cost of the mediator conducting the mediation.

If the parties are unable to resolve any dispute through mediation as set forth herein, all questions and disputes with respect to the rights and obligations of the parties arising under the terms of this Agreement shall be resolved by binding arbitration. Any party may demand arbitration by filing a written demand with the other party. If the parties cannot agree on one arbitrator, each of the parties, within twenty (20) days after the parties fail to agree on one arbitrator, at its own cost, shall appoint one arbitrator and those arbitrators shall select an impartial arbitrator to conduct the arbitration. Should a party refuse or neglect to join in the arbitrator or to furnish the arbitrator with any papers or information demanded, the arbitrator may proceed ex parte.

A hearing on the matter to be arbitrated shall take place before the arbitrator in the County where CLIENT is located, State of California. The arbitrator shall select the time and place promptly and shall give each party written notice of the time and place at least ninety (90) days before the date selected. The parties shall be entitled to conduct discovery by agreement or by order of the arbitrator. Each party may present any relevant evidence at the hearing. The formal rules of evidence applicable to judicial proceedings shall not govern. Evidence shall be admitted or excluded in the sole discretion of the arbitrator. The arbitrator shall hear and determine the matter and shall execute and acknowledge the award in writing and cause a copy of the writing to be delivered to each of the parties.

The parties shall share equally the expense of arbitration, and each party shall bear its own attorney fees and costs incurred in connection with the arbitration.

The arbitrator's decision shall be binding and conclusive on the parties. A judgment confirming the award may be given by any Superior Court having jurisdiction.

**MOUNT DIABLO UNIFIED SCHOOL DISTRICT**

By \_\_\_\_\_  
Authorized Signature

Dated: \_\_\_\_\_

\_\_\_\_\_  
(Printed name)

\_\_\_\_\_  
(Printed Title)

**MEDICAL BILLING TECHNOLOGIES, INC.**

By \_\_\_\_\_  
Reid Stephens, President

Dated: \_\_\_\_\_

**MASTER SUBSCRIPTION AGREEMENT FOR OPTICLAIM SOFTWARE AS A SERVICE**

**1. Definitions:**

- a. "Affiliate" means any entity which directly or indirectly controls, is controlled by, or is under common control of CLIENT.
- b. "Agreement" means this Master Subscription Agreement for OptiClaim Software as a Service.
- c. "Content" means the information, documents, software, products, and services made available to CLIENT.
- d. "CLIENT Data" means any data, information, or material provided by MBT to the Hosted Service.
- e. "Hosted Service" means MBT's online service accessed at a web site or IP address designated by MBT, which CLIENT is being granted access to under this Agreement.
- f. "Intellectual Property Rights" means patent rights, design rights, copyrights, trademarks, service marks, trade names, domain name rights, mask work rights, know-how and trade secret rights, and all other intellectual property rights, derivatives thereof as well as other forms of protection of a similar nature.
- g. "Master Contract" means the LEA Medi-Cal Direct Billing Program OptiServices Contract entered into between CLIENT and MBT.
- h. "MBT Technology" means all MBT proprietary technology made available to CLIENT in providing the Hosted Service.

**2. License Grant & Restrictions:** MBT hereby grants CLIENT a non-exclusive, non-transferable, worldwide right to use the Hosted Service, solely for its own internal business purposes, subject to the terms and conditions of this Agreement.

CLIENT agrees not to: (i) license, sublicense, sell, resell, transfer, assign, distribute or otherwise make available to any third party the Hosted Service; (ii) modify or make derivative works based upon the Hosted Service; or (iii) reverse engineer the Hosted Service.

CLIENT will not: (i) knowingly send or store infringing, obscene, libelous or otherwise unlawful or tortious material to the Hosted Service; (ii) knowingly send or store material containing viruses, worms, Trojan horses or other harmful computer code, files, or programs to or from the Hosted Service; (iii) knowingly interfere with or disrupt the integrity or performance of the Hosted Service; (iv) attempt to gain unauthorized access to the Hosted Service or its systems or networks; or (v) use the Hosted Service in violation of applicable law.

**3. CLIENT Responsibilities:** CLIENT is responsible for all activity occurring under CLIENT user accounts and will abide by all applicable laws, treaties and regulations in connection with its use of the Hosted Service.

**4. CLIENT Data:** MBT does not own any CLIENT Data. CLIENT Data is CLIENT's proprietary and confidential information and will not be accessed, used or disclosed by MBT except as set forth in the Master Contract and except for the limited purpose of supporting CLIENT's use of the Hosted Service. CLIENT has sole responsibility for the accuracy, legality, reliability, and intellectual property ownership to use the CLIENT Data.

**5. Intellectual Property Ownership:** MBT owns all right, title and interest, including all related Intellectual Property Right, in and to the MBT Technology, Content and the Hosted Service. This Agreement and the Master Contract are not a sale, and do not convey any rights of ownership in the Hosted Service.

**6. Charges and Payment of Fees:** CLIENT will pay all fees and charges in accordance with the terms of the Master Contract. All charges, fees and compensation for the Hosted Service are included in the terms of the Master Contract.

**7. Duration and Termination:** The term and duration of this Agreement shall commence on the same date as the Master Contract, shall continue through the same date as the Master Contract, and is subject to termination as set forth in the Master Contract. At the conclusion or termination of this Agreement, CLIENT will no longer have access to the Hosted Service and MBT Technology.

**8. Termination for Cause:** Any breach of CLIENT's payment obligations or unauthorized use of the Hosted Service will be deemed a material breach of this Agreement. MBT may terminate this Agreement, CLIENT account, or CLIENT's use of the Hosted Service if CLIENT commits a material breach of this Agreement or otherwise fails to comply with this Agreement or the Master Contract, and such breach has not been cured within ten (10) days after notice of such breach.

**9. Representations & Warranties:** Each party represents and warrants that it has the legal power and authority to enter into this Agreement. MBT represents and warrants that (a) it will provide the Hosted Service in a manner consistent with general industry standards; (b) the Hosted Service will perform substantially in accordance with the provided documentation; (c) it will use best efforts to detect software viruses and other undesirable components and will promptly take all reasonable steps to remove or neutralize any such components; and (d) it will use leading commercial encryption technology designed to encrypt CLIENT Data in its possession.

**10. Mutual Indemnification:** CLIENT will indemnify, defend, and hold MBT, and each such party's affiliates, officers, directors, employees, attorneys and agents harmless from and against any and all claims, costs, damages, losses, liabilities and expenses arising out of or in connection with: (i) a claim by a third party alleging that use of the CLIENT Data infringes the Intellectual Property Rights of a third party; provided in any such case that MBT (a) promptly gives CLIENT written notice of the claim; (b) gives CLIENT sole control of the defense and settlement of the claim; and (c) provides CLIENT all available information and assistance.

MBT will indemnify, defend and hold CLIENT and CLIENT affiliates, officers, directors, employees, attorneys and agents harmless from and against any and all claims, costs, damages, losses, liabilities and expenses arising out of or in connection with: (i) any breach of confidentiality of CLIENT Data due to the negligence of MBT or its employees or agents, and (ii) a claim by a third party alleging that the Hosted Service directly infringes an Intellectual Property Right of a third party; provided that CLIENT (a) promptly gives written notice of the claim to MBT; (b) gives MBT sole control of the defense and settlement of the claim; and (c) provides MBT all available information and assistance.

**11. Disclaimer:** THE REPRESENTATIONS AND WARRANTIES PROVIDED IN THIS AGREEMENT ARE MBT'S COMPLETE AND EXCLUSIVE REPRESENTATIONS AND WARRANTIES. MBT DISCLAIMS ALL OTHER REPRESENTATIONS, WARRANTIES AND GUARANTIES OF ANY KIND.

**12. Limitation of Liability:** Any damage claims of CLIENT arising out of this Agreement, including claims based on negligence or breach of the terms and conditions of this Agreement, shall be limited as set forth in the Master Contract.



Insurance



**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)  
06/05/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Gary Campbell(9518391) 130 N Akers St Ste B Visalia CA 93291-5121		<b>CONTACT NAME:</b> PHONE (A/C, NO, EXT): 559-627-8700 FAX (A/C, NO): 559-624-0648 E-MAIL ADDRESS: gcampbell@farmersagent.com	
<b>INSURED</b> MEDICAL BILLING TECHNOLOGIES 525 W MAIN ST SUITE 204 & 205 VISALIA CA 93291		INSURER(S) AFFORDING COVERAGE INSURER A: Truck Insurance Exchange 21709 INSURER B: Farmers Insurance Exchange 21652 INSURER C: Mid Century Insurance Company 21687 INSURER D: LandMark American Insurance Company INSURER E: INSURER F:	

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAME ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDTL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
C	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	Y	N	602186454	07/06/2018	07/06/2019	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea Occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
C	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			602186454	07/06/2018	07/06/2019	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			602616892	07/06/2018	07/06/2019	EACH OCCURRENCE \$ AGGREGATE \$ 8,000,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	A19503144	01/01/2019	01/01/2020	PER STATUTE OTHER \$ E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	Professional Liability			LCY832620 00	08/06/2018	08/06/2019	2,000,000

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 Mount Diablo Unified School District listed as additional insured.

<b>CERTIFICATE HOLDER</b> Mount Diablo Unified School District 1936 Carlotta Dr. Concord, Ca 94519	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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## Client List

Client Name	Address	Name	Email Address	Phone Number	Client Since
Alisal Union School District	1205 East Market Street, Salinas, CA 93905	Joshua Kim	Joshua.Kim@alisal.org	(831)753-5711	7/1/13
Anaheim Elementary School District	1001 South East Street, Anaheim, CA 92805	Leslie Coghlan	lcoghlan@anaheimelementary.org	(714) 517-7526 Ext. 4110	1/1/12
Apple Valley Unified School District	12555 Navajo Road, Apple Valley, CA 92308	David Wheeler	david_wheeler@avusd.org	(760) 247-8001 Ext. 1334	5/19/11
Armona Union Elementary School District	P.O. Box 368, Armona, CA 93302	Susan Fagundes	sfagundes@armona.k12.ca.us	(559)583-5002	8/1/08
Aromas-San Juan Unified School District	2300 San Juan Hwy, San Juan Bautista, CA 95045	Mariana Solomon	msolomon@asjusd.k12.ca.us	(831)823-4500 ext. 1214	5/23/17
Arvin Union Elementary School District	737 Bear Mountain Boulevard, Arvin, CA 93203	Kathie Kouklis	kouklis@arvin-do.com	(661)854-6508	5/26/98
Beryessa Union Elementary School District	1376 Piedmont Road, San Jose, CA 95132	Christy Boyd	cboyd@busd.net	(408)254-1820	8/14/07
Bishop Unified School District	301 North Fowler Street, Bishop, CA 93514	Chanel Linnastruth	clinnastruth@bishopschools.org	(760)876-5579	12/19/17
Blochman Union Elementary School District	4949 Foxen Canyon Road, Santa Maria, CA 93454	Nancy Shafer	blochman@sbceo.org	(805)937-1148 Ext. 113	6/24/16
Buellton Union Elementary School District	595 Second Street, Buellton, CA 93427	Rebecca Holmes	rholmes@bueltonusd.org	(805)886-2767 ext.2	8/23/07
Buena Park Elementary School District	6885 Orangethorpe Avenue, Buena Park, CA 90620	Lori Smock	lsmock@bpps.k12.ca.us	(714)736-4257	7/1/11
Burton Union Elementary School District	264 N. Westwood Avenue, Porterville, CA 93257	Anthony Martin	anthony.martin@burtonschools.org	(559)782-5954	5/26/98
Buttontwillow Union Elementary School District	400 McKittrick Highway, Buttontwillow, CA 93206	Susan Watkins	swatkins@buttonwillowschool.com	(661)764-9405	3/15/05
Campbell Union Elementary School District	155 North Third Street, Campbell, CA 95008	Chiara Perry	CPerry@campbellusd.org	(408)364-4200 ext. 6219	6/1/12
Carmel Unified School District	P.O. Box 222700, Carmel, CA 93922	Casey O'Brien	cobrien@carmelunified.org	(831)824-1546 ext. 2010	2/10/11
Central Union Elementary School District	15783 18th Avenue, Lemoore, CA 93245	Andrea Afrunti	aaftrunt@central.k12.ca.us	(559)925-2620	4/24/97
Cerritos College	11110 Alondra Boulevard, Norwalk, CA 90650	Hilary Mennella	hmennella@cerritos.edu	(562)860-2451 ext.7830	7/1/17
Classical Academies Charter Schools	157 East Valley Parkway, Escondido, CA, 92025	Con Coffey	ccoofey@classicalacademy.com	(760)477-5171	7/1/19
Clovis Unified School District	1450 Hemdon Ave, Clovis, CA, 93611	Sue Rutledge	SusanRutledge@clovisusd.k12.ca.us	(559)327-9127	7/1/18
Coast Unified School District	1350 Main Street, Cambria, CA 93428	Courtney Burton	cburton@coastusd.org	(805)927-3889	12/1/07
Columbia College	11600 Columbia College Dr., Sonoma, CA 95370	Laureen Campaña	campanal@yosemite.edu	(209)588-5204	10/16/17
Conejo Valley Unified School District	1400 East Janss Road, Thousand Oaks, CA 91362	Lisa Miller	LAMiller@conejousd.org	(805)622-6900 Ext. 158	8/1/13
Corcoran Joint Unified School District	1520 Patterson Avenue, Corcoran, CA 93212	DeLinda Chubbuck	delinda@chubbuck@corcoranunified.com	(559)992-8888 Ext. 1248	9/13/17
Corona-Norco Unified School District	2820 Clark Avenue, Norco, CA 92860	Cecilia Azaga-Chester	cchester@cnusd.k12.ca.us	(951) 736-5111 Ext. 1621	8/11/16
Cosumnes River College	8401 Center Parkway, Sacramento, CA 95823	Kimberly McDaniel	modanik@crc.losrios.edu	(916)991-7487	10/20/09
Crafton Hills College	11711 San Canyon Road, Yucaipa, CA 92399	Hannah Sandy	hsandy@sbccd.cc.ca.us	(909)389-3272	9/17/08
Cuttler-Orosi Unified School District	12623 Avenue 416, Orosi, CA 93647	Gary Sanchez	gasanchez@cojusd.org	(559)528-3928 ext. 1309	11/14/07
Dinuba Unified School District	1327 E. El Monte Way, Dinuba, CA 93618	Rashella Avalos	Rashella.Avalos@dinuba.k12.ca.us	(559)595-7200 ext. 7210	2/26/95
East Valley SELPA	144 N. Mk. View Avenue, San Bernardino, CA 92408	Patty Metheny	patty_metheny@sbcoss.net	(909)252-4507	8/1/13
Edison School District	P. O. Box 368, Edison, CA 93220	Pam Thomas	pthomas@edison.k12.ca.us	(661)366-8625	9/13/17
El Tejon Unified School District	4337 Lebec Road, Lebec, CA 93243	Wendy Jones	wjones@eltejon.k12.ca.us	(661)248-6247 ext. 1	8/11/16
Evergreen Elementary School District	3188 Quimby Road, San Jose, CA 95148	Carole MacLean	cmaclea@eesd.org	(408)270-6840	10/20/09
Exeter Unified School District	215 North Crespi, Exeter, CA 93221	Aimee Miculian	amiculian@exeter.k12.ca.us	(559)592-9421 ext. 9106	9/17/08
Farmersville Unified School District	571 East Citrus, Farmersville, CA, 93223	Daren Hardy	dhardy@farmersville.k12.ca.us	(559)592-2010	7/1/18
Fillmore Unified School District	P.O. Box 697, Fillmore, CA 93016	Mary Williams	mwilliams@fillmoreusd.org	(805)524-6000	11/14/07
Fremont Union High School District	589 West Fremont Avenue, Sunnyvale, CA 94087	Nancy Sullivan	nancy_sullivan@fuhisd.org	(408)522-2232	2/26/15
Golden Valley Unified School District	37479 Avenue 12, Madera, CA 93636	Diana Forshee	dforshee@gvusd.k12.ca.us	(559)645-7533	6/7/13
Goleta Union Elementary School District	401 North Flarview Ave., Goleta, CA 93117	Margaret Saleh	msaleh@goleta.k12.ca.us	(805)681-1200 ext. 220	7/1/04
Gonzales Unified School District	P.O. Drawer G, Gonzales, CA 93926	Ken Goeken	kgoeken@gonzales.k12.ca.us	(831)675-0100 ext. 8109	8/8/08



Greenfield Union School District (Kem)	1624 Fairview Road, Bakersfield, CA 93307	Melissa Ortiz	ortizm@gfusd.net	(661)837-6130	5/26/98
Greenfield Union School District (Monterey)	493 El Camino Real, Greenfield, CA 93927	Lisa Mazza	LisaK.Mazza@greenfield.k12.ca.us	831-674-2840 x2029	9/25/08
Guadalupe Union Elementary School District	P.O. Box 788, Guadalupe, CA 93434	Anne Rigali	arigali@gusdobbcats.com	(805)843-6155	3/5/03
Hanford Joint Union High School District	823 W. Lacy Boulevard, Hanford, CA 93230	Renee Creech	rreecch@jhjhsd.k12.ca.us	(559)583-5901 ext. 3112	12/17/08
Hesperia Unified School District	15576 Main Street, Hesperia, CA 92345	Matthew Fedders	matthew.fedders@hesperiausd.org	(760)244-4411 ext. 7209	5/15/12
Hollister Elementary School District	2690 Cienega Road, Hollister, CA 95023	Rosa Barraza	rbarraza@hesd.org	(831)930-6312	4/27/05
Hueneme Elementary School District	205 North Ventura Road, Port Hueneme, CA 93041	Denise Hicklin	dicklin@hueneme.org	(805)488-3588 ext. 9241	10/7/05
Irvine Valley College	5500 Irvine Center Dr., SC 150, Irvine, CA 92618	Nancy Montgomery	nmontgomery@ivc.edu	(949)451-5221	3/1/17
Kern Union High School District	5801 Sundale Avenue, Bakersfield, CA 93309	Alan Mattlin	alan_mattlin@kernhigh.org	(661)827-4800	6/30/01
Kernville Union Elementary School District	P.O. Box 2905, Lake Isabella, CA 93240	Randall Fieber	rfieber@kernvilleusd.org	(760)379-2556	8/25/98
Kingsburg Elementary Charter School District	1310 Stroud Avenue, Kingsburg, CA 93631	Heather Schofield	hschofield@kesd.org	(559)897-6864	1/18/11
Lake Elsinore Unified School District	545 Chaney Street, Lake Elsinore, CA 92530	Donna Wolter	donna.wolter@leusd.k12.ca.us	(951)253-7051	11/5/02
Las Virgenes Unified School District	4111 N. Las Virgenes Road, Calabasas, CA 91302	Derek Ihori	dihori@vvsd.org	(818)878-5216	11/5/12
Laton Unified School District	6259 East De Woody St, Laton, CA, 93242	Rachel Kreifels	rkreifels@latonunified.org	(559)922-4065	7/1/19
Lawndale Elementary School District	4161 West 147th Street, Lawndale, CA 90260	Libby Vracin	libby_vracin@lawndale.k12.ca.us	(310)973-1300 ext. 50112	3/19/13
Le Grand Union High School District	12961 East Le Grad Road, Le Grand, CA 95333	Stacie Buchner	sbuchner@lghs.k12.ca.us	(209)889-8400 ext. 195	7/1/17
Lemoore Union High School District	5 Powell Avenue, Lemoore, CA 93245	Mark Howard	mhoward@lhhsd.k12.ca.us	(559)924-8610 ext. 1206	6/22/11
Lennox School District	10319 Firmona Avenue, Lennox, CA 90304	Eric Medrano	eric_medrano@lennox.k12.ca.us	(310)895-4000	5/15/13
Live Oak Elementary School District	984-1 Bostwick Lane, Santa Cruz, CA 95062	Jennifer Ann	jann@losd.ca	(831)475-6333	8/30/04
Los Angeles Pierce College	6201 Winnetka Avenue, Woodland, Hills, CA 91371	Elizabeth Benne	benneea@piercollege.edu	(818)710-4270	7/1/16
McFarland Unified School District	601 Second Street, McFarland, CA 93250	Juan Carrasco	jucarrasco@mfand.k12.ca.us	(661)792-3255	5/12/97
Millennium Charter High School	901 Blanco Circle, Salinas, CA 93901	Shann Chu	principal@mcchs.school	(831)755-0830	10/24/16
Milpitas Unified School District	1331 East Calaveras Boulevard, Milpitas, CA 95035	Carla Crenshaw	ccrenshaw@musd.org	(408)635-2600 ext. 6009	7/12/11
Modesto Junior College	435 College Avenue, Modesto, CA 95350	Lonia Cordova	cordova@yosemite.edu	(209)575-7765	3/8/17
Monson-Sultana Joint Union Elementary School District	P.O. Box 25, Sultana, CA 93666	Benita Cortez	benita@msschool.org	(559)591-1634 ext. 114	7/14/97
Monterey County Office Of Education - Alternative Education	P. O. Box 80851, Salinas, CA 93912	Debra Brau	dbrau@montereycoe.org	(831)755-0830	8/27/02
Monterey County Office Of Education - Home Charter	P. O. Box 80851, Salinas, CA 93912	Justin McCollum	jmccollum@montereycoe.org	831-755-0300 x031	8/27/02
Monterey County Office Of Education - Special Education	P. O. Box 80851, Salinas, CA 93912	Deborah Still	dstill@montereycoe.org	831-755-0331	8/27/02
Monterey Peninsula Unified School District	700 Pacific St, Monterey, CA 93942	Katie Rivera	krvera@mpusd.k12.ca.us	(831)845-1207	7/1/19
Moorpark Unified School District	5297 Maureen Lane, Moorpark, CA 93021	Anne Gibson	agibson@mnpk.org	(805)378-6300 Ext. 140	4/10/03
Morgan Hill Unified School District	15600 Concord Circle, Morgan Hill, CA 95037	Jenna Mittleman	mittlemanj@mhusd.org	408-201-6040 x51040	5/23/08
Mount Diablo Unified School District	1936 Carlotta Drive, Concord, CA 94519	Veronica Pisani	pisaniv@mdusd.org	(925)882-8000 ext. 4058	10/9/13
Mount Pleasant Elementary School District	3434 Marten Avenue, San Jose, CA 95148	Laurie Brelton	lbrleton@mpesd.org	(408)223-3740	6/15/11
Mountain View Whisman School District	750-A San Pierre Way, Mountain View, CA 94043	Gary Johnson	gjohnson@mhwisd.org	(650)526-3500 ext. 1163	4/3/09
Napa Valley College	2277 Napa-Vallejo Highway, Napa, CA 94558	Nancy Tamarisk	ntamarisk@napavalley.edu	(707)556-7000	3/19/03
Ojai Unified School District	P.O. Box 878, Ojai, CA 93024	Rebecca Kirkland	rkirkland@ojaisd.org	(805)640-4300 ext. 1016	6/28/12
Oxnard Union High School District	309 South K Street, Oxnard, CA 93030	Sid Albaugh	sid.albaugh@ouhsd.k12.ca.us	(805)385-2512	3/19/03
Pacific Grove Unified School District	435 Hillcrest Avenue, Pacific Grove, CA 93950	Clare Davies	cdavies@pgusd.org	(831)646-6523	3/19/03
Panama-Buena Vista Union School District	4200 Ashe Road, Bakersfield, CA 93313	Michele Johnson	mjohnson@pbvvsd.net	(661)831-1906 ext. 6544	6/28/12
Pittsburg Unified School District	2000 Railroad Avenue, Suite H, Pittsburg, CA 94565	LA'Shawn Spencer	lspencer@pitsburg.k12.ca.us	(925)473-2313	6/27/07
Pixley Union Elementary School District	300 N. School Street, Pixley, CA 93256	Kory Sanchez	ksanchez@pixley.k12.ca.us	(559)757-3131	5/9/13

Plainsburg Union Elementary School District	3708 S. Plainsburg Road, Merced, CA 93541	Stacie Buchner	sbuchner@ighs.k12.ca.us	(209)389-9400 ext. 195	7/1/16
Planada Elementary School District	P. O. Box 236, Planada, CA 95365	Stacie Buchner	sbuchner@ighs.k12.ca.us	(209)389-9400 ext. 195	5/3/12
Porterville Unified School District	600 W. Grand Avenue, Porterville, CA 93257	Kevin Jessee	kjessee@portervilleschools.org	(559)793-2473	2/23/07
Redondo Beach Unified School District	1401 Inglewood Avenue, Redondo Beach, CA 92078	Jessica Silberling	jsilberling@rbusd.org	(310)798-8683	5/16/17
Reef-Sunset Unified School District	205 N. Park Avenue, Avenal, CA 93204	Micky Yocum	myocum@rsusd.org	(559)386-5300 ext. 1001	5/1/97
Richland Union Elementary School District	331 Shafter Avenue, Shafter, CA 93263	Laurie Roth	lroth@richland.k12.ca.us	(661)746-8613	4/5/99
Rio Bravo-Greeley Union Elementary School District	6521 Eros Lane, Bakersfield, CA 93314	Vicki Duke	vduke@rbusd.org	(661)589-2505	4/5/17
Rosedale Union Elementary School District	2553 Old Farm Road, Bakersfield, CA 93312	Pam Polin	ppolin@uesd.net	(661)588-6000 ext. 155	7/1/10
Saddleback College	28000 Marguerite Pkwy, SSC 177, Mission Viejo, CA 92692	Jeanne Harris-Caldwell	jhamiscaldwell@saddleback.edu	(949)582-4507	5/12/16
Salinas City Elementary School District	840 S. Main Street, Salinas, CA 93901	Jan Hamilton	jhamilton@salinascity.k12.ca.us	831-753-5600	12/19/02
Salinas Union High School District	431 West Alisal Street, Salinas, CA 93901	Renata Rios	renate.rios@salinasuhd.org	831-796-7050	11/12/13
San Benito COE	460 Fifth Street, Hollister, CA 95023	Bill Sachau	bsachau@sbcoe.org	(831)830-2525 ext. 504	7/1/15
San Benito High School District	1220 Monterey Street, Hollister, CA 95023	Paulette Cobb	pcobb@sbhsd.k12.ca.us	831-637-5831	9/9/14
San Bernardino Valley College	701 South Mount Vernon Ave., San Bernardino, CA 92410	Elaine Akers	eakers@sbvcc.cd.ca.us	(909)384-4495	5/12/17
San Miguel Joint Union Elementary School District	1601 L Street, San Miguel, CA 93451	Stephanie Schofield	sschofield@sanmiguelsschools.org	(805)467-3216	4/24/08
Santa Clara County Office of Education	1290 Ridder Park Dr, San Jose, CA 95131	Cynthia Loleng-Perez	cschofield@sanmiguelsschools.org	(408)453-4368	7/1/19
Santa Clara Unified School District	P.O. Box 397, Santa Clara, CA 95052	Rose Dumond	rdumond@scusd.net	(408)423-2072	11/13/06
Santa Cruz City Schools	405 Old San Jose Road, Soquel, CA 95073	Stacy O'Farrell	sofarrell@scs.santacruz.k12.ca.us	831-429-3410 x201	3/9/01
Santa Cruz County Office of Education	400 Encinal Street, Santa Cruz, CA 95060	Deven Wood	dwood@santacruzcoe.org	(831)466-5600	3/9/01
Santa Maria Joint Union High School District	2560 Skyway Drive, Santa Maria, CA 93454	Frances Evans	fevans@smjhsd.org	(805)922-4573 ext. 4221	7/22/02
Santa Maria-Bonita Elementary School District	708 South Miller Street, Santa Maria, CA 93454	Peggy Perdue	pperdue@smbd.net	(805)361-8215	6/26/00
Santa Paula Unified School District	201 South Steckel Drive, Santa Paula, CA 93060	Kristi Grooms	kgrooms@santapaulaunified.org	(805)933-8840	9/15/11
Santa Rita Union Elementary School District	57 Russell Road, Salinas, CA 93906	Nadene Dermody	ndermody@santitaschools.org	(831)443-7200 ext. 1210	1/3/04
Scotts Valley Unified School District	4444 Scotts Valley Dr., Ste. 5B, Scotts Valley, CA 95066	Sharlene Anes	sranes@scottsvalleysd.org	831-438-1820 x103	2/6/13
Selma Unified School District	3125 Wright St, Selma, CA 93662	Kathy Pimer	kpimer@selmausd.org	(559)988-6550 ext. 41197	7/1/19
Soledad Unified School District	1261 Metz Road, Soledad, CA 93960	Nathan Moreno	nmoreno@soledad.k12.ca.us	831-768-1581 x137	1/12/05
Sonoma Valley Unified School District	17850 Railroad Avenue, Sonoma, CA 95476	Nikamie Redcoff	nredcoff@sonomaschools.org	(707)935-6004	5/22/09
South Fork Union School District	5225 Kelso Valley Road, Weldon, CA 93283	Debbie Kennedy	dkennedy@southforkschool.org	(760)378-4000 ext. 6	9/5/00
Southern Kern Unified School District	P.O. Drawer CC, Rosamond, CA 93560	Sheryl Taylor	staylor@skusd.k12.ca.us	(661)256-5060	4/2/08
Strathmore Union Elementary School District	P.O. Box 247, Strathmore, CA 93267	Sherry Hall	shall@suesd.k12.ca.us	(559)568-2118- ext. 207	5/18/99
Sunnyvale School District	819 West Iowa Avenue, Sunnyvale, CA 94086	Debbie Betancourt	debbie_betancourt@ssed.org	(408)522-8200 ext. 230	4/4/13
Taft City Elementary School District	820 N. Sixth Street, Taft, CA 93268	Adele Ward	award@taftcity.org	(661)765-4153	11/11/99
Temecula Valley Unified School District	31350 Rancho Vista Road, Temecula, CA 92592	Ami Paradise	aparadise@tvusd.k12.ca.us	(951)506-7981	4/17/12
Terra Bella Union Elementary School District	9121 Road 240, Terra Bella, CA 93270	Mary Suarez	msuarez@buesd.org	(559)535-4451 ext. 1114	9/9/04
Tipton Elementary School District	P.O. Box 787, Tipton, CA 93272	Stacey Beitencourt	sbeitencourt@tipton.k12.ca.us	(559)752-4213	9/9/11
Tulare City Elementary School District	600 N. Cherry Avenue, Tulare, CA 93274	Tricia Leslie	tleisle@tcsd.k8.org	(559)885-7217	4/10/00
Tulare Joint Union High School District	426 N. Blackstone, Tulare, CA 93274	Marie Pinto	marie.pinto@tulare.k12.ca.us	(559)888-2021	4/29/97
Vineyard Elementary School District	14713 Weedpatch Highway, Bakersfield, CA 93307	Trisha Courson	tcourson@vineyard.k12.ca.us	(661)845-3719	11/7/07
Visalia Unified School District	5000 West Cypress Avenue, Visalia, CA 93277	Suzie Skadan	sskadan@visalia.k12.ca.us	(559)730-7580	5/11/10
Wasco Union Elementary School District	1102 Fifth Street, Wasco, CA 93280	Kellie Absey	keabsey@wuesd.org	(661)758-7190	5/13/97
Western Placer Unified School District	600 Sixth Street, Ste. 400, Lincoln, CA 95648	Diane Metzelaar	dmetzelaar@wpusd.k12.ca.us	(916)845-4078	7/1/11

Woodlake Unified School District	300 West Whitney Avenue, Woodlake, CA 93286	Debbie Kenyon	dkenyon@w-usd.org	(559)564-8081 ext. 8211	6/3/97
Woodland Star Charter School	17811 Arnold Drive, Sonoma, CA 95476	Holly Colangelo	holly@woodlandstarschool.org	(707)896-3849	11/6/17
Yuba County SELPA	935 14th Street, Marysville, CA 95901	Lora Gonzalez	lora.gonzalez@yubacoe.k12.ca.us	(530)749-4873	1/1/14

## OptiServices Screen Shots

The OptiSuite Dashboard allows users to navigate between applications

The screenshot shows the OptiSuite Dashboard for a user named Nurse Betty. The top navigation bar includes the Medical Billing Technologies Inc. logo, a user profile with the name "Welcome, Nurse Betty" and "Change Password" link, and a "Log Out" button. A left sidebar contains navigation links: "Need Assistance? Contact MBT", "Dashboard", "OptiClaim", "OptiReports", "FileProcessor", and "OptiLearn". The main content area is titled "WELCOME, NURSE BETTY !" and features four application tiles: "OptiClaim" (Track services that you provide to students), "OptiReports" (Make informed decisions with valuable data), "FileProcessor" (Upload files quickly and securely), and "OptiLearn" (Learn everything you need to participate in the LEA program). The footer contains version information (Version 1.2.8 Build 1), copyright (© 2011 Medical Billing Technologies, Inc.), and a "Chat with MBT staff" button.

Administration: Manage user specific data

The screenshot displays the "USER - User Information" administration form. The form is divided into several sections:

- User Information:** Fields for First Name (Nurse), Last Name (Betty), Email (nurse@mbt4schools.com), and Phone Number (Area Code, Phone, Ext.). Status is set to Active. Buttons for "Reset Password" and "Send User Credentials" are present.
- Applications:** A row of checkboxes for Administration, OptiClaim, OptiReports, File Processor, and OptiLearn, all of which are checked.
- File Processor Information:** A dropdown menu for "Assign File Processor Roles" is set to "User". A button "Assign File Type(s)" is shown, with "Assigned File Type(s)" listing "LEA Billing".
- OptiClaim Information:** Fields for "OptiClaim Role" (Assign OptiClaim Role(s) with a dropdown showing "Practitioner") and "Practitioner Type" (Assign Practitioner Type with a dropdown showing "Registered Credentialed School Nurse").
- Other Fields:** "Year" (2015-2016), "Bill Services?" (Yes), and "Supervisor" (Mickey Mouse).
- LEA Department:** A button "Assign Departments" with a dropdown showing "Dept 1".

At the bottom of the form are three buttons: "Save And New", "Save", and "Cancel".

Administration: Manage student specific data

### STUDENT SEARCH

**First Name :**  \*

**Middle Name :**

**Last Name :**  \*

**Date of Birth :**  \*

**Gender:**  Male  Female \*

**Medical Eligible:** No Medi-Cal Eligibility Data Available

**BIC # :**

**OT Prescription :** 0 prescriptions

**PT Prescrikption :** 0 prescriptions

**Status:**  Active  Inactive

**Link this student to :**

### OptiClaim Information

**Year:** 2015-2016

**IEP?:**  Yes  No

**Bill Services?:**  Yes  No

**Transportation?:**  Yes  No

<b>Sunday</b>	<input checked="" type="radio"/> One Way	<input type="radio"/> Two Way	<input type="text"/> Miles
<b>Monday</b>	<input type="radio"/> One Way	<input checked="" type="radio"/> Two Way	6 <input type="text"/> Miles
<b>Tuesday</b>	<input type="radio"/> One Way	<input checked="" type="radio"/> Two Way	6 <input type="text"/> Miles
<b>Wednesday</b>	<input type="radio"/> One Way	<input checked="" type="radio"/> Two Way	6 <input type="text"/> Miles
<b>Thursday</b>	<input type="radio"/> One Way	<input checked="" type="radio"/> Two Way	6 <input type="text"/> Miles
<b>Friday</b>	<input type="radio"/> One Way	<input checked="" type="radio"/> Two Way	6 <input type="text"/> Miles
<b>Saturday</b>	<input checked="" type="radio"/> One Way	<input type="radio"/> Two Way	<input type="text"/> Miles

OptiClaim: The Service Entry screen allows users to input service details for submission

**OPTICLAIM - Service Entry** Your Role: Practitioner

Client :  [Add New Student](#)

Practitioner :

Student's Name :

Date of Service :

Service Type :

Reason for Service :

Service Duration :  minutes  Not Performed

[Submit](#) [Cancel](#)

**Recently Entered Services**

Student	Date of Service	Service Type	Service Duration	Reason for Service	
Matthews, Dave	04/05/2016	Nursing Services	20	Seizures (Epilepsy/Lennox Gastaut)	- Select Action --
Matthews, Dave	04/01/2016	Annual Nursing Assessment	0	Assessment, Unspecified	- Select Action --

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[Chat with MBT staff](#)

OptiClaim: The Caseload screen allows users to save and manage caseloads

**OPTICLAIM - Nurse Betty's Caseload** Your Role: Practitioner

Students: 2 [Group View](#) [List View](#) [Edit Caseload](#)

Student:  Date of Birth:  [Search](#) Select Month: April 2016 [Submit](#)

Student	Service Type	Reason For Service	Group Name	Duration	Date of Service
Mouse, Mickey - 01/01/2012 <a href="#">Remove</a>	Nursing Services	Seizures (Epilepsy/Lennox Gastaut)	Monday Morning Group	<input type="text" value="20"/>	<input type="text"/>
Matthews, Dave - 01/01/2012 <a href="#">Remove</a>	Nursing Services	Seizures (Epilepsy/Lennox Gastaut)	Monday Morning Group	<input type="text" value="20"/>	<input type="text"/>

[Submit](#)

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OptiClaim: The Service List allows users to navigate through their history of entered services

**OPTICLAIM - Service List** Your Role: Practitioner

Student :  Date of Service :  To

Service Count : 5

Student	Practitioner	Date of Service	Service Type	Min	Reason for Service	Action
Matthews, Dave 01/01/2012	Betty, Nurse	04/05/2016	Nursing Services	20	Seizures (Epilepsy/Lennox Gastaut)	-- Select Action --
Matthews, Dave 01/01/2012	Betty, Nurse	04/01/2016	Annual Nursing Assessment	0	Assessment, Unspecified	-- Select Action --
Matthews, Dave 01/01/2012	Betty, Nurse	01/01/2016	Nursing Services	30	Adjustment Reaction, Unspecified	-- Select Action --
Matthews, Dave 01/01/2012	Betty, Nurse	12/01/2015	Nursing Services	30	Adjustment Reaction, Unspecified	-- Select Action --
Matthews, Dave 01/01/2012	Betty, Nurse	02/01/2015	Nursing Services	30	Adjustment Reaction, Unspecified	-- Select Action --

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File Processor: Allows users to upload and download digital files such as LEA billing logs, student enrollment files, IEP lists, transportation logs and OT/PT service plans

**FILE PROCESSOR - LEA Billing**

Submit Date :  To  Billing Month :

Total Files: 3 Download Billing Log:

Billing ID	Client	Practitioner	Billing Month	Status	Uploaded By	Uploaded On
<a href="#">27944</a>	Client X	Betty, Nurse	01/2016	Original - Uploaded	Betty, Nurse	04/23/2016 02:27 PM
<a href="#">27943</a>	Client X	Betty, Nurse	02/2016	Original - Uploaded	Betty, Nurse	04/23/2016 02:26 PM
<a href="#">27942</a>	Client X	Betty, Nurse	03/2016	Original - Uploaded	Betty, Nurse	04/23/2016 02:26 PM

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OptiReports: The Practitioner Tracking report allows coordinators to view the history of services entered by each user

Client :  Year :  Practitioner Type :

Title	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Yearly Totals
Speech	11	105	100	49	29		16	39	11				360
<b>Speech Therapist 1</b>								4					4
IEP Assessments:								3					3
Individual Treatments:								1					1
<b>Speech Therapist 2</b>		2	5		21			3					31
IEP Assessments:					3								3
Individual Treatments:		2	2		4			2					10
Group Treatments:			3		14			1					18
<b>Speech Therapist 3</b>	11	103	95	49	8		16	28	11				321
IEP Assessments:	2	8	11	8	1		1	2	2				35
Individual Treatments:	2	86	78	12	6		3	20	9				216
Group Treatments:	7	9	6	29	1		12	6					70

OptiLearn: Allows users to access all MBT's training materials, reference guides, and video tutorials

**OPTILEARN**

**Training Guides, Forms and Handouts**

Documents designed to assist participants with the LEA program.

- [LEA Monthly Billing Log \(0.104 MB\)](#)  
Use for billing monthly IEP assessments and therapy
- [Assessments Log \(0.13 MB\)](#)  
Record IEP and non-IEP assessments on this journal-style log
- [LEA Quick Reference Guide \(0.697 MB\)](#)  
One page handbook explaining the basics of the LEA program.
- [OT Prescription Form \(0.062 MB\)](#)  
OT Prescription Form
- [LEA Billing Upload Instructions for Practitioners \(0.218 MB\)](#)  
For Practitioners: Updated instructions on how to upload LEA billing logs to the File Processor.
- [Specialized Health Care Log Packet Cover Sheet \(0.059 MB\)](#)  
Cover sheet for the specialized health care service logs monthly submission
- [Specialized Health Care Log - Seizures \(0.041 MB\)](#)  
A sample health aide/hursing log created to save time for those working with students with seizures
- [IT Minimum Requirements \(0.221 MB\)](#)  
Minimum requirements to access our Web site, software and e-mail correspondence
- [Random Claims Reviews and Audits \(0.509 MB\)](#)  
Information about what might be requested in an audit or claims review, and an explanation of terms
- [TCM Service Plan \(0.073 MB\)](#)  
A TCM "Service Plan" to be used for billing case management services for an IEP/FSP student.
- [LEA Enrollment, IEP/FSP & Trans Upload Guide \(0.587 MB\)](#)  
Guide for uploading enrollment, IEP/FSP lists and transportation data in File Processor
- [Training Slide Show \(3.163 MB\)](#)  
A copy of the slides from the webinar training presentation
- [Specialized Health Services Log \(0.13 MB\)](#)  
Log for specialized health care services
- [TCM Billing Log \(0.194 MB\)](#)  
Billing log for Targeted Case Management
- [Specialized Phys Health Care Services Log \(0.072 MB\)](#)  
A log to record nurse or paraprofessional specialized physical health care services

**LEA Training Videos**

Videos contain captions, speakers not required.

- [MBT Web Portal and OptiClaim Tutorial \(05:40\)](#)  
Learn how to login and enter Assessments and Treatments.
- [LEA Medi-Cal Billing Overview \(07:55\)](#)  
Gives an overview of how to bill Medi-Cal services.
- [Managing Caseloads \(04:17\)](#)  
Learn how to create groups and submit services using the Caseload feature.
- [Excel Billing Logs \(05:08\)](#)  
Complete the Excel billing logs and use the File Processor
- [Targeted Case Management Training \(16:51\)](#)  
Learn about TCM services and how to log them in OptiClaim



Live Chat: Allows users to access technical and program support instantaneously

**OPTICLAIM - Service Entry**
Your Role: Practitioner

**Client :**  Add New Student

**Practitioner :**

**Student's Name :**

**Date of Service :**

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

**Service Type :**

**Reason for Service :**

**Service Duration :**  minutes  Not Performed

Submit
Cancel

**Recently Entered Services**

Student	Date of Service	Service Type	Service Duration	Reason
Matthews, Dave	04/05/2016	Nursing Services	20	Seizures (Epilepsy/Lenr
Matthews, Dave	04/01/2016	Annual Nursing Assessment	0	Assessment, Unspecifi

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Welcome to MBT Live Chat
— ✕

**Reid Stephens**  
Support Operator

Medical Billing TECHNOLOGIES INC

Reid Stephens

Hello Nurse Betty. How may I help you?

Nurse Betty

Hi. I am new to OptiClaim. Can you assist me in setting up my caseload?

Delivered

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