

UCare Connect/Connect + Medicare

Care Coordination and Long-Term Services and Supports


Title: Monthly Activity Log Job Aid

Purpose: To provide instructions for completing the Connect/Connect + Medicare Monthly Activity Log assessment, TOC and mid-year support plan update reporting.

Procedure: The Connect/Connect + Medicare Monthly Activity Log is designed as a tool for counties/agencies to report to UCare the assessment outcome of each member assigned and the mid-year/TOC support plan updates that occur throughout the year. The required reporting applies to all assigned members in both Connect and Connect + Medicare health plans. The Monthly Activity Log data is collected on a single tab with a drop-down to select the appropriate health plan type. Examples of how to enter data are provided in the top three rows.

Definition:

Delegate: The county or contracted agency that is assigned to a member to provide ongoing care coordination

	<p style="text-align: center;">Formatting matters</p> <p>Entering information in the correct format will eliminate the need for corrections. For tips on editing the Monthly Activity Log (MAL), see Addendum A and B attached.</p>
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Do's

- By the 15th day of each month, all logs are emailed to UCare at connectintake@ucare.org for the previous month's activity
 - Example: assessment conducted in February is reported on the log submitted by March 15th
 - If an assessment occurs prior to the 15th of the month, it may be reported within the same month of the activity
- Delegates submit **one** Excel spreadsheet with all the activity/assessments and support plan updates completed by care coordinators
 - Save the spreadsheet in the following format: **delegate month year**
 - **Example:** Clay July YYYY
- Be sure you indicate the delegate's name in the cell B3
- Enter the member's 9-digit UCare ID# that starts with #4 (Note: This is not the PMI)
- Only add comments to the comment section
- **Connect + Medicare only:** When an Unable to Reach activity type is indicated, ensure there are **4 documented attempts** to reach the member and reflect those dates within the log, in columns K-M. The 4th attempt is the activity date (column H).
 - If there is no working number/address, document efforts to find valid contact information in the member record. Use comments to report no working number/address.
- If an assessment is missed in one month's log, it can be entered in the following month's log
- Add all support plan updates when completed for a mid-year review, transition of care, and other significant updates
- At any time during the year, if a previous UTR/Refusal (NR/NI) member has completed an assessment, add the member to the Monthly Activity Log and update the Health Status code to HP
- Add THRA activity for **Connect + Medicare** when a member has a current HRA/support plan and is unable to be reached
 - **Activity Completion Date:** Date of the last actionable attempt
 - **Type of Activity:** "THRA Attempted: UTR"
 - HS code remains HP

Don'ts

- **Do not add to any other column or try to change the formatting of the spreadsheet**
- Do not report other products on the Connect/Connect + Monthly Activity Log
- **Do not** log delegate transfers unless a new HRA is completed
- Do not add support plan update information when a member is unable to reach or refuses the update
- Do not change the HS code during a Support Plan update
- Do not add refused THRAs that are entered in MnCHOICES
- Do not add completed THRAs that were entered in MnCHOICES
- **Connect ONLY:** Do not add Unable to Reach THRAs there were entered in MnCHOICES

Example:

Member Demographics							Assessment Activity			Connect + Medicare Only		
Assigned Assessor Entity	Product	Last Name	First Name	UCare Member ID# (9 digits)	DOB	Living Status	2025 Activity Completion Date	HS Code (Select from the drop down menu)	If HP: Type of Activity	Unable To Reach Attempt 1	Unable To Reach Attempt 2	Unable To Reach Attempt 3
UCare	Connect+Med	Doe	Jane	451236541	10/20/1960	Community	1/13/2025	HP	THRA Attempted: UTR	1/2/2025	1/7/2025	1/10/2025

Column Descriptions



Member Demographics

Assigned Assessor Entity: Auto populates when the delegate is selected in cell B3.
 Product: Select from drop-down: Connect or Connect + Med
 Last Name/First Name:
 UCare Member ID: Must be 9 digits and start with a "4"
 Date of Birth (DOB): Entered as MM/DD/YYYY
 Living Status: Found on Enrollment Roster
Selection options: Community or Institutional.

Annual Assessment Activity

[YYYY] Activity Completion Date: Enter the date of the current year's assessment activity (this includes the HRA date, UTR final contact attempt or date HRA was declined).
 HS Code: Enter the HS code from the drop-down options
Selection options: HP, NI, NR, and GH (GH is a code for select delegates).
 Type of Activity:
Selection options: In Person, Televideo, Telephonic-F2F offered, THRA Attempted: UTR

Connect + Medicare Only: K – M Enter actionable attempt dates for members unable to be reached for assessment.

Support Plan Updates

NOTE: When entering Support Plan updates, the annual assessment activity columns should NOT be updated.
 [YYYY]Support Plan Update mid-year/TOC: Enter the mid-year, TOC or other support plan updates from the drop-down option.
Selection options: Mid-year, TOC, and other.
 [YYYY] Date of Support Plan Update: Enter the date of the completed Support Plan update.
 Type of Activity:
Selection options: In Person, Televideo and Telephonic.

Care Coordinator/Scheduler

Last Name of Assessor: For refusals or UTR, list the name of the scheduler
 First Name of Assessor: For refusal or UTR, list the name of the scheduler
 Title: Credentials/job title relevant to the care coordinator/scheduler role
 Comments – Use this cell to add notes, details and other clarifying information as needed.

Addendum A

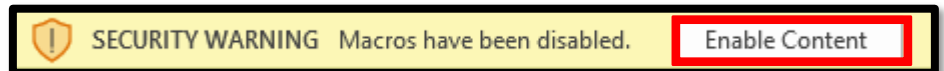
Tips for Assessment Reporting on the Monthly Activity Log

The intended purpose of the Monthly Activity Log (MAL) template is to provide a single place to track member assessment activity and support plan updates. Entering information in the correct format will help eliminate the need for corrections.

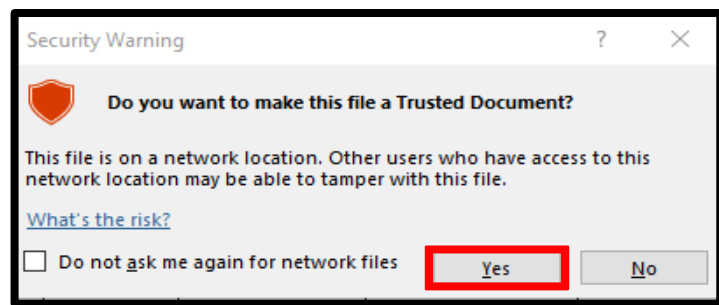
Handling security warnings

When opening the MAL template, the yellow message bar may appear with a shield icon and the Enable Content button.

- Click *Enable Content*



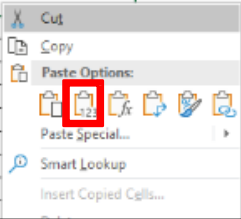
- In the Security Warning pop-up window, click Yes



Pasting information into the template

- Only paste into **columns C (Member Last Name) through G (Living Status)**. Do not paste over column A (Delegate Name).
- After copying information from the source document, **right-click** in the target cell on the log template
- Under **Paste Options**, select **Values (V)**

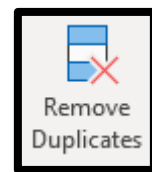
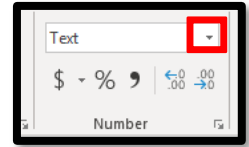
	Last Name	First Name	ID#	DOB	drop down menu	ce
	Doe	Jane	00099999000	1/26/1934	Community	
	Doe	John	00099999100	10/22/1941	Community	
	Doe	Jane	00099999000	1/26/1934	Community	
	Doe	Jane	00099999001	1/27/1934	Community	
	Doe	Jane	00099999002	1/28/1934	Community	
	Doe	Jane	00099999003	1/29/1934	Community	
	Doe	Jane	00099999004	1/30/1934	Community	
	Doe	John	00099999104	10/26/1941	Community	



Aggregating information from different sources

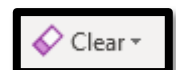
In this scenario, individual care coordinators use a document other than the template for their initial data entry. Before pasting the data into the log template, take the following steps.

- Make sure Member IDs on the source sheet are formatted as **text** as required to retain all 9 digits beginning with #4
 - Highlight the column containing member IDs
 - On the ribbon in Excel, verify that the format is text
 - Use the dropdown arrow to change from other formats to text
- Check for and remove duplicate rows
 - Select all data columns
 - On the *Data* tab in Excel, click *Remove Duplicates*
 - In the Remove Duplicates pop-up screen, verify that the *My data has headers* box is checked and **all** column names are listed and checked
 - Click OK
 - Read the confirmation message to ensure the correct number of rows was deleted. Use the Undo command in Excel (or keyboard shortcut Ctrl + z)
- Cells in the following columns contain key information that should not be missing:
 - Assigned Delegate
 - Product
 - Member Last Name
 - Member First Name
 - UCare Member ID
 - Member Date of Birth (DOB)
 - Living status – *community* or *institutional* are the only values allowed
 - Activity Completion Date – in the current year
 - HS Code – *assessment*, *refusal* and *unable to reach* are the only values allowed (NR, NI, HP, GH (for specific delegates)



Deleting information from the template

- Select cells to delete – single or multiple cells in a row except for cells in column A (delegate name)
- Press the *delete* key on the keyboard or click *Clear* on the ribbon
 - Click on *Clear Content* in the dropdown
- Replace the cells with new data or copy and paste from the rows below



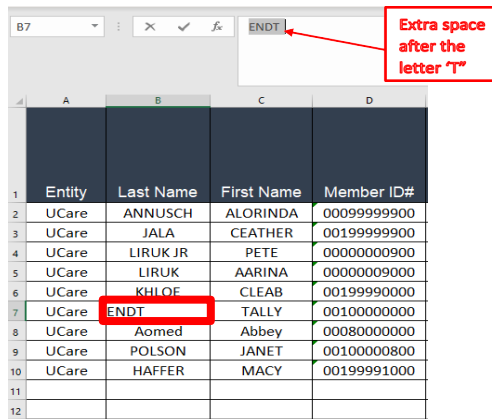
Addendum B

Remove “noise/extra space(s)” before copying & pasting data to the log.

The example below shows the steps to remove noise/extra space. Repeat steps for:

- Last Name
- First Name
- Member ID
- DOB

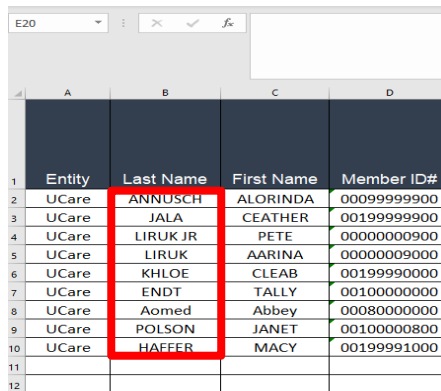
I. Check the data for noise/extra space(s)



Entity	Last Name	First Name	Member ID#
UCare	ANNUSCH	ALORINDA	00099999900
UCare	JALA	CEATHER	00199999900
UCare	LIRUK JR	PETE	00000009000
UCare	LIRUK	AARINA	00000009000
UCare	KHLOE	CLEAB	00199990000
UCare	ENDT	TALLY	00100000000
UCare	Aomed	Abbey	00080000000
UCare	POLSON	JANET	00100000800
UCare	HAFFER	MACY	00199991000

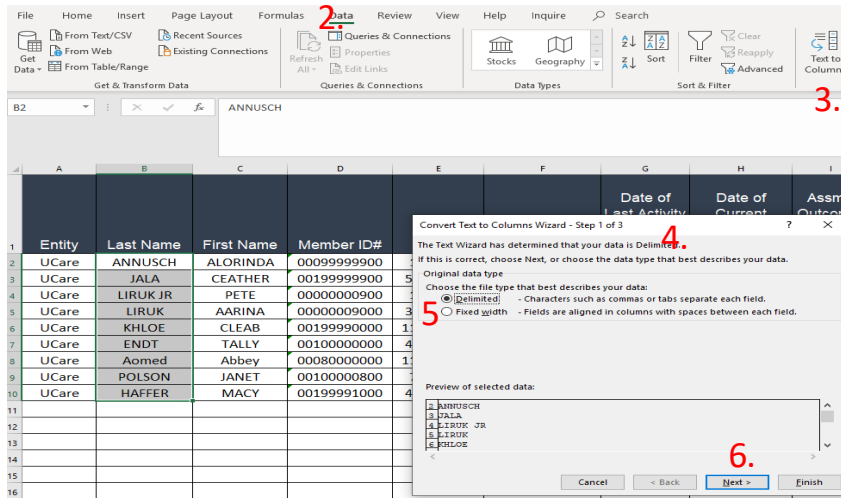
II. Remove the noise/extra space

1. Highlight the data cells in column C (Last Name)

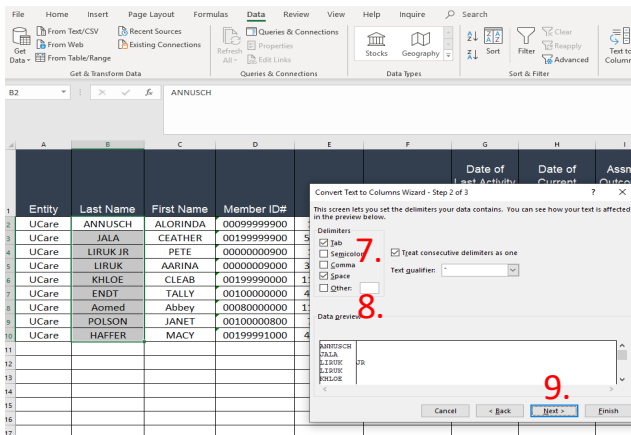


Entity	Last Name	First Name	Member ID#
UCare	ANNUSCH	ALORINDA	00099999900
UCare	JALA	CEATHER	00199999900
UCare	LIRUK JR	PETE	00000009000
UCare	LIRUK	AARINA	00000009000
UCare	KHLOE	CLEAB	00199990000
UCare	ENDT	TALLY	00100000000
UCare	Aomed	Abbey	00080000000
UCare	POLSON	JANET	00100000800
UCare	HAFFER	MACY	00199991000

2. Select Data icon
3. Select the Text to Columns icon
4. The Convert Text to Columns Wizard – Step 1 or 3 appears
5. Select the “Delimited” radio button, if not selected
6. Click “Next” button



7. Click “Tab”
8. Click “Space”
9. Click “Next” button



10. Click the second column (highlight the column black)
11. Click “do not import column (skip)” radio button

Convert Text to Columns Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

General
 Text
 Date: MDY
 Do not import column (skip)

Destination: \$B\$2

Data preview

General Skip Column
 ANNUSCH
 JALA
 LIRUK JR
 LIRUK
 KHLOE

Cancel < Back Next > Finish

12. Click "Finish" button – The extra space is now removed!

	A	B	C	D
1	Entity	Last Name	First Name	Member ID#
2	UCare	ANNUSCH	ALORINDA	00099999900
3	UCare	JALA	CEATHER	00199999900
4	UCare	LIRUK	PETE	00000009000
5	UCare	LIRUK	AARINA	00000009000
6	UCare	KHLOE	CLEAB	00199990000
7	UCare	ENDT	TALLY	00100000000
8	UCare	Aomed	Abbey	00080000000
9	UCare	POLSON	JANET	00100000800
10	UCare	HAFFER	MACY	00199991000
11				
12				

Repeat the steps for First Name, Member ID and DOB.