## %UCare

### 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

S	6
2	C

#### **Formatting matters**

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.

### Do's

- By the 15th day of each month, all logs are emailed to UCare at <u>connectintake@ucare.org</u> 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
  - o 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

## %UCare

#### 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		
Assig	gned 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
UCar	ire	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
					Со	lumn	Descrip	tions					

### 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 dropdown 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

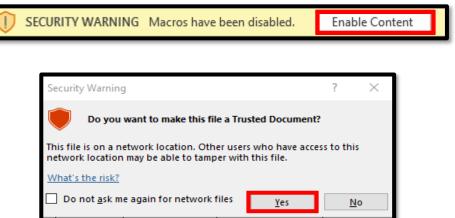
## Tips for Assessment Reporting on the Monthly Activity Log

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)	C
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	
	X  Cut    Scopy  Paste Options:    Paste Special  Paste Special    P  Smart Lookup    Insert Copied C	C & C				

## %UCare.

## 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
  - $\circ$   $\,$  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
  - o 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
  - o Product
  - Member Last Name
  - o Member First Name
  - o UCare Member ID
  - Member Date of Birth (DOB)
  - o Living status *community* or *institutional* are the only values allowed
  - $\circ~$  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

	Te	đ			-
	\$	- %	,	<b>←</b> 0 .00	.00 -
R		Num	nber		Fa





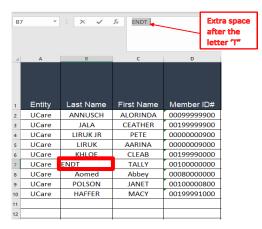
## %Ucare.

## 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)



### II. Remove the noise/extra space

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

E2	E20 • : × ✓ &								
	А	В	с	D					
1	Entity	Last Name	First Name	Member ID#					
2	UCare	ANNUSCH	ALORINDA	000999999900					
з	UCare	JALA	CEATHER	00199999900					
4	UCare	LIRUK JR	PETE	00000000900					
5	UCare	LIRUK	AARINA	00000009000					
6	UCare	KHLOE	CLEAB	00199990000					
7	UCare	ENDT	TALLY	00100000000					
8	UCare	Aomed	Abbey	0008000000					
9	UCare	POLSON	JANET	00100000800					
10	UCare	HAFFER	MACY	00199991000					
11									
12									



- 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

Fil G Dat	P I I From T III I I From V et ta + III From T	ext/CSV [ 👌 Reco	e Layout Form ent Sources ting Connections	ulas 22ata Re Queries & Refresh Properties All- Etdit Links Queries & Conn		onnections Stocks Geography v k Sort Filter Advanced Text to Column
-4	A	В	с	D		E F G H I
1	Entity	Last Name	First Name	Member ID#		Date of Date of Assm Lest Activity Current Outron Convert Text to Columns Wizard - Step 1 of 3 ? X The Text Wizard has determined that your data is beliminet
2	UCare	ANNUSCH	ALORINDA	000999999900		If this is correct, choose Next, or choose the data type that best describes your data.
з	UCare	JALA	CEATHER	00199999900	5	5 Original data type Choose the file type that best describes your data:
4	UCare	LIRUK JR	PETE	00000000900		Choose the file type that best describes your data:
5	UCare	LIRUK	AARINA	00000009000	3	3 S O Fixed width - Fields are aligned in columns with spaces between each field.
6	UCare	KHLOE	CLEAB	00199990000	1:	1
7	UCare	ENDT	TALLY	00100000000	4	4
8	UCare	Aomed	Abbey	0008000000	1:	1:
9	UCare	POLSON	JANET	0010000800	- 1	Preview of selected data:
10	UCare	HAFFER	MACY	00199991000	4	4
11						2 ANNUSCH
12						4 LIRUK JR
13						E KHLOE
14						<b>.</b>
15						Cancel < Back Next > Einish
16						

- 7. Click "Tab"
- 8. Click "Space"
- 9. Click "Next" button

Green Torren Value  Dealing contections  Properties    Bate  Error  Form Value  Stocks  Gregoryby    Bate  From Value  Data types	Fil	e Home	Insert Pag	e Layout Form	ulas Data Re	view	View	Help	Inquire 🔎	Search		
	G	et a + 🖽 From 1	Neb 🌔 Exist Table/Range		Refresh All - B Edit Links			Stocks		Z↓ Sort	Filter Reapply	Text to Columns
A C D C D C P G H Date of Date of Ass Convet Test to Columns: Wand - Step 2 d A This scene is your data contains. You can see how your test is affect UCare ANNUSCH ALORINDA 00009999000 UCare LIRUK /R PTE 0000000000 UCare LIRUK /R PTE 00000000000 UCare CINCAL CEATHER 00199990000 1 UCare LIRUK /R ANINA 00000000000 0 UCare CINCAL CEATHER 00199990000 1 UCare LIRUK /R ANINA 00000000000 0 UCare CINCAL CEATHER 00199990000 1 UCare CINCAL CEATHER 0019999000 1 UCare CINCAL CEATHER 0019990000 1 UCare CINCAL CEATHER 0019900000000 1 UCare CINCAL CEATHER 0019990000 1 UCare CINCAL CEATHER 0019990000 1 UCare CINCAL CEATHER 0019990000 1 UCare CINCAL CEATHER 00199000 1 UCare CINCAL CEATHER 00199000000 0 UCare CINCAL CEATHER 00199000000000 1 UCare CINCAL CEATHER 00199000000000000000000000000000000000												
Date of Last Achieve UCare  Date of Last Achieve ANNUSCH  Accellente Accellente Accellente UCare  Date of Last Achieve UCare  Accellente Accellente UCare  Date of Last Achieve UCare  Accellente Date of Last Achieve UCare  Date of Last Achieve Date of Last Achieve UCare  Accellente Date of Last Achieve UCare  Accellente Date of Last Achieve Date	B2	Ť	× ✓	<u>∱</u> ANNUSCH								
1  Entity  Lest Name  Member UZ  Text Achitette  Ceneet Tet to Columns: Wand-Step 2 of 3  ? >>    1  Entity  Lest Name  First Name  Member UZ  Text Scene its your data certains. You can see how your test is affect    1  UCare  ANNUSCH  ALORINDA  000099999000  State and an	-4	А	В	c	D		E		F	G	н	1.1
Image: Second Secon	I						Convert Text t	o Colur	nns Wizard - Step 2 d	act Activity	Current	Assmt.
UCare      ANNUSCH      ALORINDA      00099999000      In the provine ballow.        UCare      IAIA      CEATHER      00199999000      IS      Issued and the provine ballow.        UCare      LIRUK IR      PETE      0000000900      IS      Issued and the provine ballow.        UCare      LIRUK IR      AARINA      0000009000      IS      Issued and the provine ballow.        UCare      RHIOE      CLEAB      00190990000 1      ISsued and the provine ballow.      Issued and the provine ballow.        UCare      ENIOT      TALLY      00100000000 1      Issued and the provine ballow.      Issued and the provine ballow.        UCare      Anmed      Abbey      00100000000 1      Issue and the provine ballow.      Issue and the provine ballow.        UCare      HAFERR      MACY      00199991000 4      Issue and the provine ballow.      Issue and the provine ballow.        UCare      HAFERR      MACY      00199991000 4      Issue and the provine ballow.      Issue and the provine ballow.      Issue and the provine ballow.        Issue and the provine ballow      Issue and the provine ballow.      Issue and the provine ballow.      Issue and the provine ballow.		Entity	Lost Namo	First Name	Mombor ID#							in all related
UCare      JAAA      CEATHER      00199999000      S      Distance        UCare      URLKIK      PTE      0000009000      S      Distance        UCare      URLKIK      AARINA      0000009000      S      Distance        UCare      URLKIK      CLEAB      00130000000      S      Distance        UCare      RHLOE      CLEAB      00130000000      Distance      Distance        UCare      RHLOE      CLEAB      00130000000      Distance      Distance        UCare      POLSON      JANET      00130000000      Distance      Distance        UCare      MARET      001300000000      Distance      Distance      Distance        UCare      MARET      001300000000      Distance      Distance      Distance        UCare      MARET      001300000000      Distance      Distance      Distance        USare      MARET      Distance      Distance      Distance      Distance        USare      MARET      Distance      Distance      Distance      Distance        USare <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>in the preview</td> <td>below.</td> <td>t the delimiters your</td> <td>bata contains. Too</td> <td>an see now your text</td> <td>is affected</td>							in the preview	below.	t the delimiters your	bata contains. Too	an see now your text	is affected
UCare UIRUK PPTE 0000000000   UCare UIRUK AARINA 00000000000   UCare LIRUK AARINA 0000000000   UCare KHLOE CLEAB 0019990000   UCare KHLOE CLEAB 0019990000   UCare Anned Abbey 0000000000   UCare POLSON JANET 00100000000   UCare HAFER MACY 0019991000   UCare HAFER MACY 0019991000   UCare UIRUK ANRE 0010000000   UCare UIRUK ANRE 00100000000   UCare UIRUK ANRE 0010000000   UCare UIRUK ANRE 00100000000   UCARE ANRE 0000000000   UCARE ANRE 0000000000   UCARE ANRE 00000000000   UCARE ANRE 000000000000000000000000000000000000	2					5		_				-
UCare      LIRUK      AARINA      00000000000      3      Cena      Tot guilifier        UCare      RHIOE      CLEAB      001300000000      1      Bisis      Tot guilifier      Image: State Stat	4					-		7	Treat consecutive	delimiters as one		-
s UCare KHLOE CLEAB 0019990000 1 UCare ENDT TALLY 0010000000 1 s UCare Aomed Abbey 0008000000 1 s UCare POLSON JANET 0010000800 1 ture HAFFER MACY 0019991000 4 ture HAFFER MACY 0019991000 4 ture HAFFER 9 ture 9	5					3		· ·			1	1
UCare      ENDI      IALLY      00100000000      1        UCare      Aomed      Abbey      00100000000      1        UCare      POLSON      JANET      00100000000      1        UCare      HAFFER      MACY      0019991000      4        10      UCare      HAFFER      MACY      0019991000      4        12      -      -      -      -      -        13      -      -      -      -      -        14      -      -      -      -      -      -        15      -	6	UCare	KHLOE	CLEAB	00199990000	1			rext guaimen	×	]	1
S      UCare      POLSON      JANET      0010000800      Data princh        10      UCare      HAFFER      MACY      00199991000      Parameter        11      12      1      1      Parameter      Parameter        12      1      1      1      Parameter      Parameter        13      1      1      1      Parameter      Parameter        14      1      1      1      Parameter      Parameter        15      1      1      1      Parameter      Parameter	7	UCare	ENDT	TALLY	00100000000	4	Other:	~				1
0 UCare      POLSON      PARET      001000000001        11      NACY      0019991000      Analysis        12      Namerica      Namerica      Namerica        13      Namerica      Namerica      Namerica        14      Namerica      Namerica      Namerica        15      Namerica      Namerica      Namerica        16      Namerica      Namerica      Namerica	8	UCare	Aomed	Abbey	00080000000	1		ĸ				[
11 Particle	9	UCare	POLSON	JANET	0010000800	1	Data greview					
11      12<	10	UCare	HAFFER	MACY	00199991000	4						[
13 2.1000 2.0000 2.000 2.000 2.000 2.000 2.000 2	11						JALA					î.
13 potos potos 9, 5	12						LIRUK JI	2				
14 Cancel < Back Nett> Einish	-						KHLOE				0	~
Cancel < Back Next > Einish							<				Э.	
16									Cancel	< <u>B</u> ack	Next >	Einish
	100							-				
17	17		l		l	_		-			l	

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

# %Ucare.

File Ge Dat	From T From V tt a + EFrom T	ext/CSV	e Layout Form ent Sources ting Connections	ulas Data Re Construction Refresh All + B Edit Links Queries & Conn		$\begin{array}{c c} \hline \\ \hline $	Text to Columns
	А	В	с	D		E F G H	1
I						Convert Text to Columns Wizard - Step 3 of 3 ?	Assmt.
1	Entity	Last Name	First Name	Member ID#		This screen lets you select each column and set the Data Format.	
2	UCare	ANNUSCH	ALORINDA	00099999900	-	Column data format	-
3	UCare	JALA	CEATHER	00199999900	5	5 General' converts numeric values to numbers, date 0 Iext to dates, and all remaining values to text.	e values
4	UCare	LIRUK JR	PETE	0000000900		O Date: MDY V Advanced	ł
5	UCare	LIRUK	AARINA	00000009000	3	Do not import column (skip)	H
6	UCare	KHLOE	CLEAB	00199990000	1:	Destination: \$8\$2	Î
7	UCare	ENDT	TALLY	0010000000	4	4	
8	UCare	Aomed POLSON	Abbey JANET	00080000000	1:	Data preview	
9	UCare UCare	HAFFER	MACY	00100000800	-	10	_ +
10 11	UCare	HAFFEN	MACT	00199991000	4	ANNUSCH	<b>_</b> ^ _
12					-	JALA LIRUK WE	-
12						LIRUK KHLOE	
14						<	>
15							12.
16						Cancel < <u>B</u> ack Next > <u>F</u> ir	nish –

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

B2	B2 ▼ : × ✓ f <sub>x</sub> ANNUSCH									
	Α	В	с	D						
1	Entity	Last Name	First Name	Member ID#						
2	UCare	ANNUSCH	ALORINDA	0009999990						
з	UCare	JALA	CEATHER	0019999990						
4	UCare	LIRUK	PETE	0000000090						
-	UCare	LIRUK	AARINA	0000000900						
-	UCare	KHLOE	CLEAB	0019999000						
7	UCare	ENDT	TALLY	0010000000						
8	UCare	Aomed	Abbey	000800000						
9	UCare	POLSON	JANET	001000080						
10	UCare	HAFFER	MACY	0019999100						
11										
12										

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