⁂ 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 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 are provided in the top three rows for how to enter data.

Definition:
Delegate: The assigned county or contracted agency that is assigned members to provide ongoing care coordination.

	Formatting matters
⁂	Entering information in the correct format will eliminate the need for corrections. See Addendum A and B attached to this job aid for tips to edit the Monthly Activity Log (MAL).

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 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
- Be sure to enter the member's 9-digit UCare ID# that starts with #4 and is not the PMI#
- Only add comments to the comment section
- **Connect + Medicare only:** When Unable to Reach is indicated, ensure there are **4 documented attempts** to reach the member and reflect those dates within the log. The 4th attempt is the activity date (column H).
  - If no working number/address, document efforts to find valid contact information in member record. Use comments to report no working number/address.
- If an assessment is missed in one month's log, it can be entered on the following month's log
- 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 delegate-to-delegate transfers, product change and MCO New Member changes
  - Activity Completion Date is the date of the THRA
  - **Product Change/MCO to MCO:** if a member has a current HRA/support plan and is unable to be reached or refuses the THRA, log the attempt to complete the THRA on the MAL by using the "THRA Attempted" activity drop down with the "Activity Completion Date" as the last attempt to reach the member or date of refusal
- HS code remains HP

Example:

Member Demographics							Annual Assessment Activity		
Assigned Assessor Entity	Product	Last Name	First Name	UCare Member ID# (9 digits)	DOB	Living Status	2024 Activity Completion Date	HS Code (Select from the drop down menu)	If HP: Type of Activity
UCare	Connect	Jane	Doe	456123658	10/20/1960	Community	1/20/2024	HP	THRA Attempted

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 when member is unable to be reached or refuses to complete THRA form
- Do not add Support Plan update information when unable to reach a member or member refuses update
- Do not change the HS code during a Support Plan update

| 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. Selections are Community or Institutional. |
| **Annual Assessment Activity**
[YYYY] Activity Completion Date: Enter the date of current year's assessment activity (this includes HRA date, UTR final contact attempt or date of verbal decline of HRA).
HS Code: Enter the HS code from the drop-down options.
Selections are HP, NI, NR, and GH (GH is a code for select delegate). If HP: Type of Activity
Selections: In Person, Televideo or Telephonic-F2F offered, THRA Attempted, THRA Telephonic, THRA F2F
Connect + Medicare Only: K – M Enter 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 drop-down option. Selections are Mid-year TOC and other.
[YYYY] Date of Support Plan Update: Enter the date of the completed Support Plan update. Type of Activity. Selections are In Person, Televideo or Telephonic. |
| **Care Coordinator/Scheduler**
Last/First Name/Title of the Care Coordinator or Scheduler.
Comments – Use this cell to add notes, details and other clarifying information as needed. |

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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 eliminating the need for corrections.
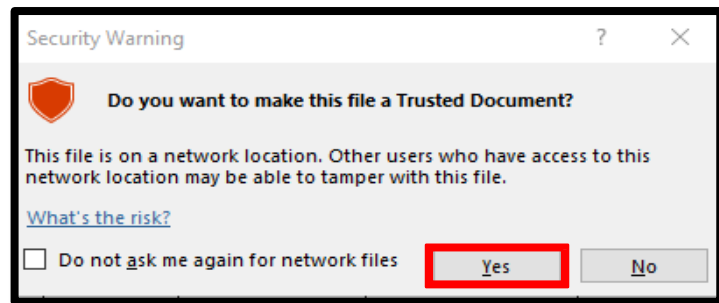
Handling security warnings

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

- Click *Enable Content*
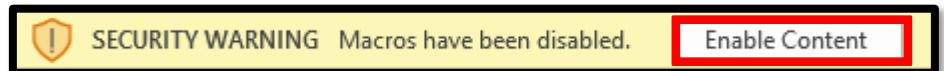
- In the Security Warning pop up window, click *Yes*

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)**

## Aggregating information from different sources

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

- 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 current year
    - HS Code – *assessment*, *refusal* and *unable to reach* are the only values allowed (NR, NI, HP, GH (for specific delegate)
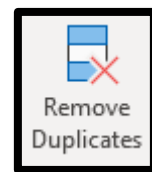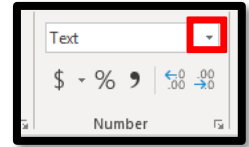
Deleting information from the template

- 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 rows below
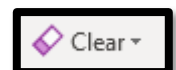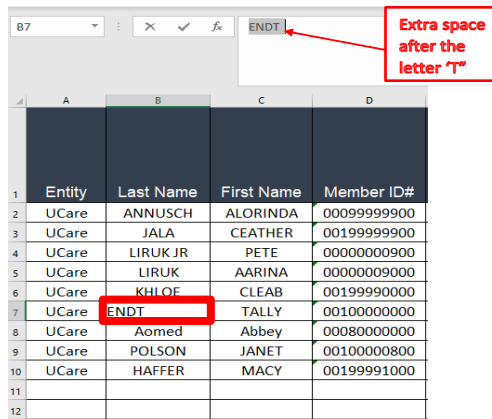
Addendum B

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:

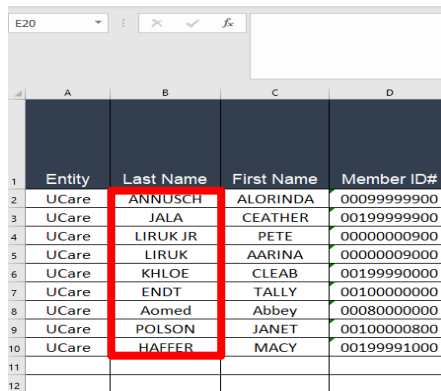- Last Name
- First Name
- Member ID
- DOB

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

II.   Remove the noise/extra space

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

2. Select Data icon
3. Select Text to Columns icon
4. The Convert Text to Columns Wizard – Step 1 or 3 appears
5. Select "Delimited" radio button, if not selected
6. Click "Next" button
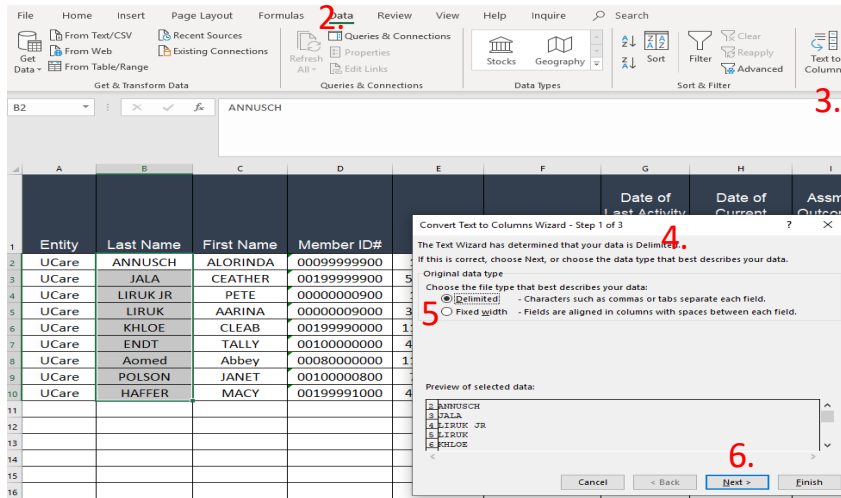
7. Click "Tab"
8. Click "Space"
9. Click "Next" button
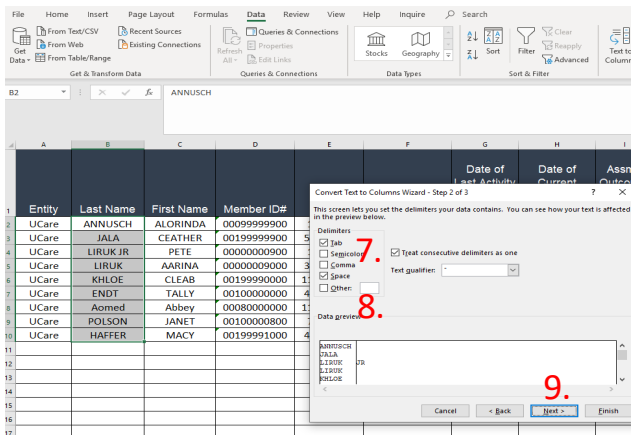
10. Click the second column (highlight the column black)
11. Click "do not import column (skip)" radio button

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

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