Job Aid

UCare Connect

Care Coordination and Long-Term Services and Supports

Title: Monthly Activity Log Job Aid

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

Procedure: The Connect 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 Connect health plans. 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

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 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
- 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 to update HS code to 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 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 Unable to Reach THRAs that are entered in MnCHOICES

Example:

Member Demographics							Assessment Activity			Support Plan Updates		
Assigned Assessor Entity	Product	Last Name	First Name	UCare Member ID# (9 digits)	DOB	Living Status	2026 Activity Completion Date	HS Code (Select from the drop down menu)	If HP: Type of Activity	2026 Support Plan Update: Mid-year/TOC	2026 Date of Support Plan Update	Type of Activity
UCare	Connect	Doe	Jane	177777777	1/1/1963	Institutional	7/5/2026	HP	THRA			
UCare	Connect	Doe	John	188888888	10/6/1964	Community	8/5/2026	NR	HRA			
UCare	Connect	Smith	Sam	199999999	12/1/1975	Community				Mid-year	1/7/2026	Telephonic

Column Descriptions

Member Demographics
Assigned Assessor Entity: Auto populates when the delegate is selected in cell B3.
Product: Select from drop-down: Connect
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: HRA, THRA

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

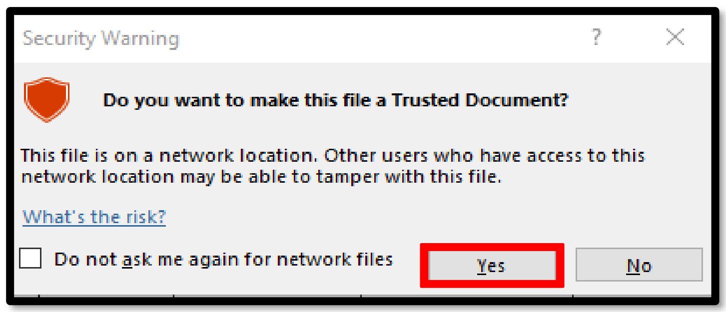
The intended purpose of the Monthly Activity Log (MAL) template is to provide a single place to track member assessment activity and support plan updates. Entering information in the correct format will help eliminate the need for corrections.

Handling security warnings

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

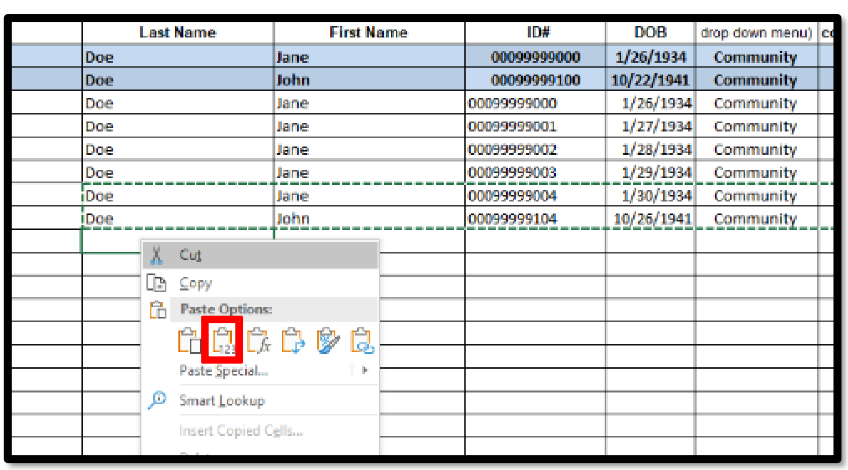
- Click *Enable Content*

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



Pasting information into the template

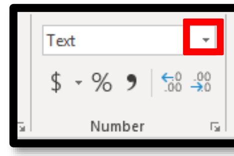
- Only paste into columns C (Member Last Name) through G (Living Status). Do not paste over column A (Delegate Name).
- After copying information from the source document, **right-click** in the target cell on the log template
- Under **Paste Options**, select **Values (V)**



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

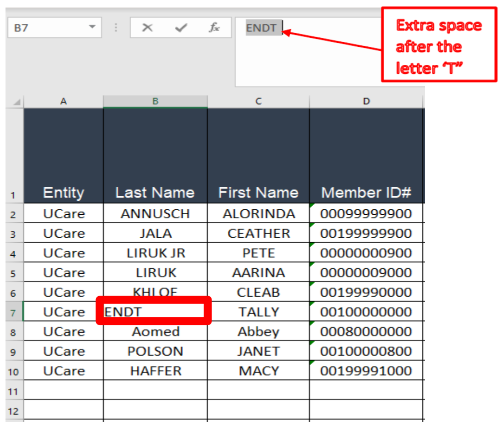
Addendum B

Remove "noise/extra space(s)" <u>before copying & pasting data to the log.</u>

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

- Last Name
- First Name
- Member ID
- DOB

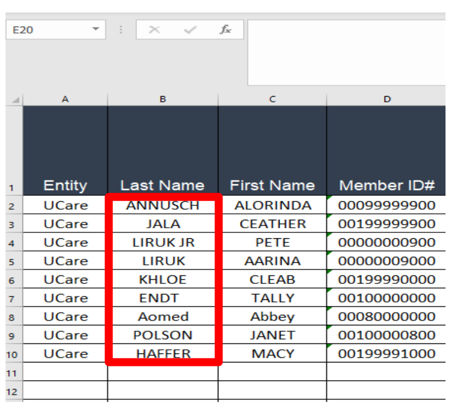
I. Check the data for noise/extra space(s)



	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 JR	PETE	00000000900
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				

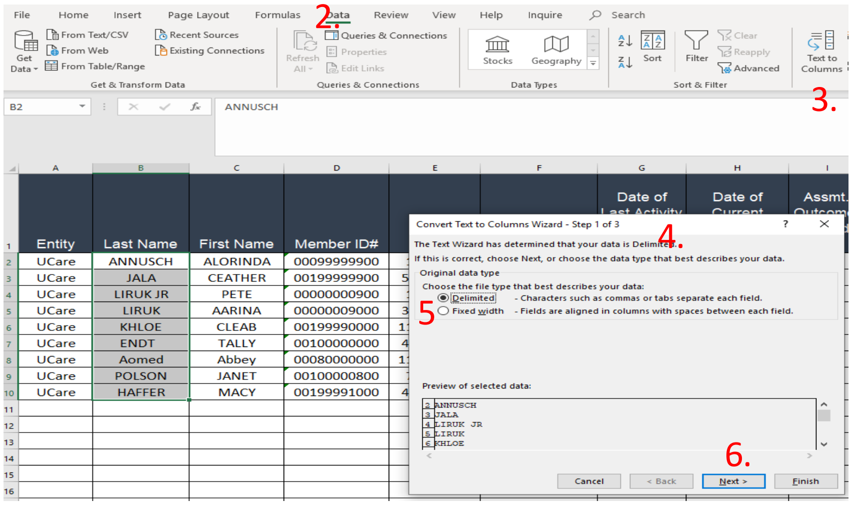
II. Remove the noise/extra space

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

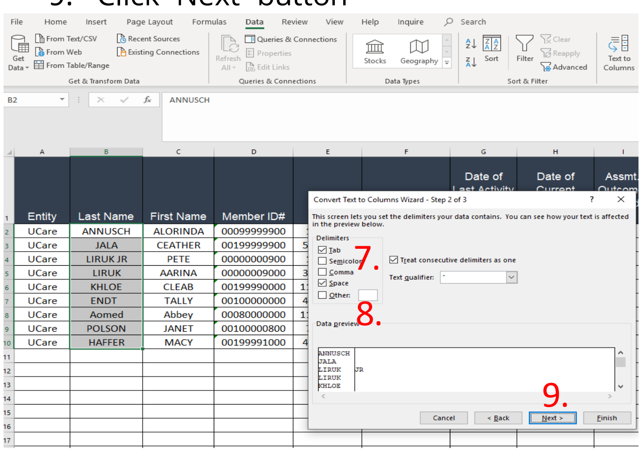


	A	B	C	D
1	Entity	Last Name	First Name	Member ID#
2	UCare	ANNUSCH	ALORINDA	00099999900
3	UCare	JALA	CEATHER	00199999900
4	UCare	LIRUK JR	PETE	00000000900
5	UCare	LIRUK	AARINA	00000009000
6	UCare	KHLOE	CLEAB	00199990000
7	UCare	ENDT	TALLY	00100000000
8	UCare	Aomed	Abbey	00080000000
9	UCare	POLSON	JANET	00100000800
10	UCare	HAFFER	MACY	00199991000
11				
12				

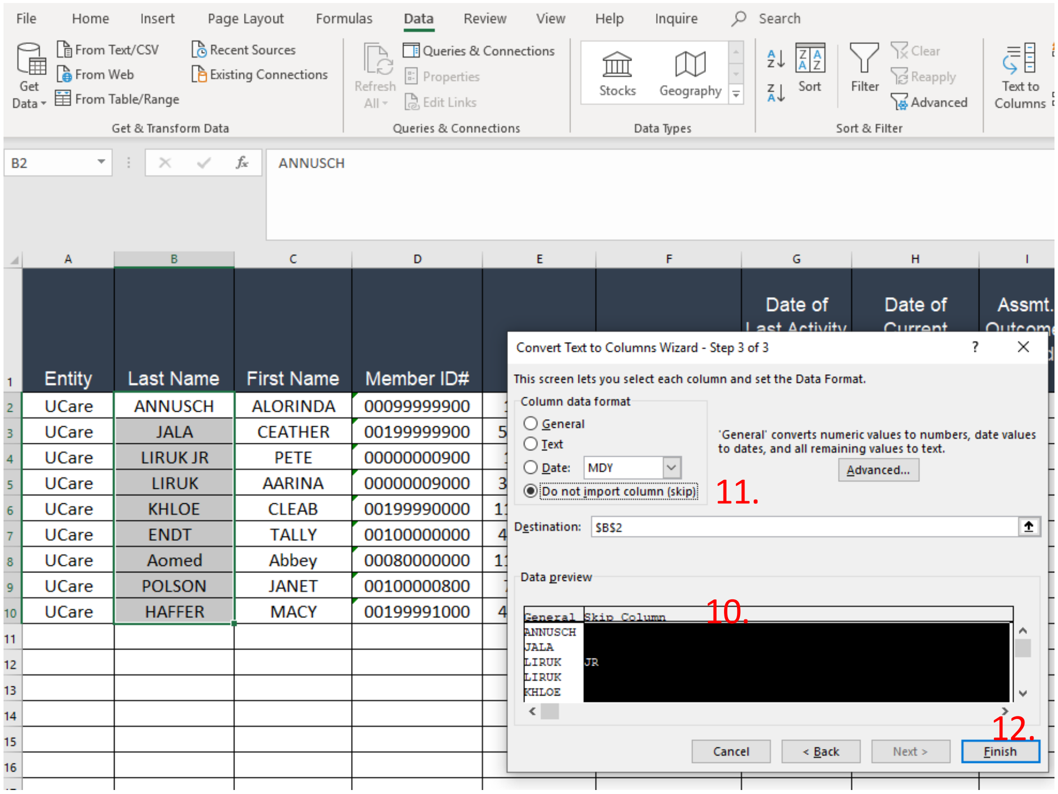
2. Select Data icon
3. Select the Text to Columns icon
4. The Convert Text to Columns Wizard – Step 1 or 3 appears
5. Select the "Delimited" radio button, if not selected
6. Click "Next" button



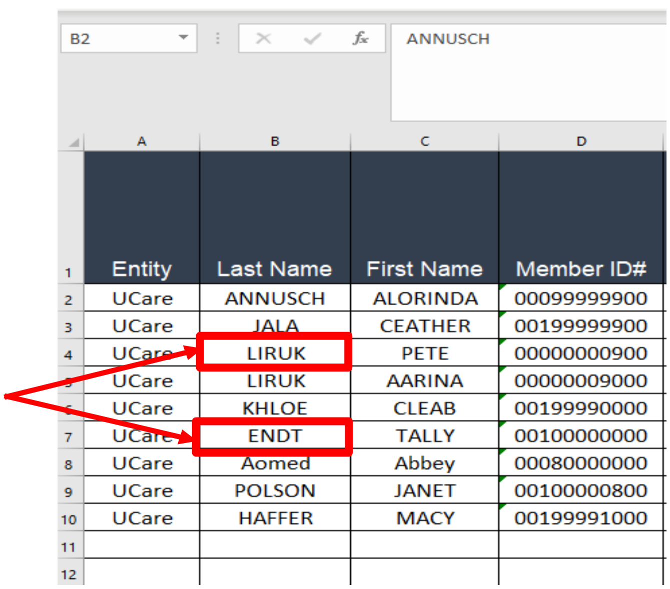
7. Click "Tab"
8. Click "Space"
9. Click "Next" button



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



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



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