I-SNP Assessment Log Tip Sheet

Tips:

✓   Only report your monthly **I-SNP activities** on the log. Do not report any other product assessments.

✓   Every month your agency should submit **one combined** Excel spreadsheet with all the activity/assessments completed by your Care Coordinators.

✓   All logs need to be emailed to UCare at assessmentreporting@ucare.org by the 10th of the following month for the previous month's activity. Example: Assessment conducted in February, should be reported on log submitted by March 10th.

✓   Save the spreadsheet in the following format: delegate/month/year. Example: FairviewJuly2025.

✓   Only add comments to the comment section, do not add to any other column or try to changethe formatting of the spreadsheet.

✓   Be sure to enter the UCare ID# and not the PMI#.

✓   **Do not** log transfers between UCare delegates or transfers within your organization. Example:Member was care managed by Genevive and transferred to Fairview Partners. **Do not** put transfer on the log unless you are completing a new assessment. Review of the existing assessment/POC does not constitute a new Health Risk Assessment.

✓   The I-SNP Assessment Log is designed as tool for delegates to report assessments/activities completed during that month.

Column Descriptions:

Column A – "Delegate" Indicate the entity you are from (i.e. delegate name). Choose from the drop-down choice offered.

Column F – "**Living Status**"

- **Assisted Living** – Member resides in Assisted Living

- **Institutionalized** – Member resides in an institutional setting (examples: SNF/NF, inpatient psychiatric facility)

Column G – "**Date of current activity completed in 2025**" – enter the date of the assessment/activity conducted during the month of the log you are submitting. For unable to reach, this date is your 4th attempt. Ensure you enter the other 3 attempt dates accordingly.

Column H – "**Activity Location in 2025**" - Choose drop down option as to how the activity was conducted. In-Person, Televideo (Audio and Visual) or Phone.

Column I – "**Type of current activity completed in 2025**" -Choose the type of assessment conducted from the drop down choices offered.

- For unable to reach, this date is your 4th attempt. Ensure you enter the other 3 attempt dates accordingly (columns J through L).

- Also enter in this area, any midyear care plan update date or updates to the care plan related to a

transition of care.

REMINDERS:

- When **Unable to Reach** is indicated, ensure you have **4 documented attempts** to reach the member, and reflect those dates within the log.
- Be sure you indicate your delegate name in the first column of the spreadsheet.
- Ensure you label your spreadsheet: delegate/month/year.
- If you miss an assessment in one month's log, you can enter that assessment in the following month's log.
- Only include I-SNP members on this report.