UCare MSC+

Care Coordination and Long-Term Services and Supports

Title: Monthly Activity Log Job Aid

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

Procedure:

The MSC+ Monthly Activity Log is a tool for counties/agencies to report certain required assessment activity and support plan updates that occur throughout the year for each assigned member. The required reporting applies to all assigned members in MSC+ health plans that experience a reportable event. Examples of how to enter data are provided in the top two rows of the log.

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 10th day of each month, all logs are emailed to UCare at assessmentreporting@ucare.org for the previous month's activity
  - Example: activity conducted in February is reported on the log submitted by March 10th
  - If an activity occurs prior to the 10th 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 to indicate the delegate's name in the cell B3
- Enter the member's 9-digit UCare ID number that starts with #4 (Note: This is not the PMI)
- Only add comments to the comment section
- If an assessment/activity 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
- Add all completed Institutional Health Risk Assessments and Institutional Transitional Health Risk Assessments (THRAs)

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 MSC+ Monthly Activity Log
- Do not log delegate-to-delegate transfers
- Do not add support plan update information when a member is unable to be reached or refuses the update
- Do not add THRAs that were entered in MnCHOICES for community members
- Do not add assessments that were entered in MnCHOICES for community members

- Do not add THRAs/FNUs that were **completed** in MnCHOICES for community members

THRA/FNU Scenarios on the MAL

Scenario	Add to MAL	Do NOT Add to MAL
THRA or FNU is successfully completed.		☑
Member is unable to be reached for a THRA		☑
Member transfers from UCare delegate to UCare delegate with a current assessment.		☑
Member is institutional (initial, reassessment, and THRAs)	☑	
Community Member is unable to be reached or refused FNU		☑
Community Member refuses THRA		☑

Example:

Member Demographics						Assessment Activity			Support Plan Updates		
Delegate	Last Name	First Name	UCare Member II	DOB	**Living Status** (Select from the drop down menu)	Date of Current Activity Completed in 2026 (4th Unable to Reach Attempt	Activity Location in 2026	Type of Current Activity Completed in 2026	2026 Support Plan Update Ty	2026 Date of Support Plan Update	Activity location
UCare	Doe	Jane	412345678	1/26/1934	Institutional	1/25/2026	In-Person	Institutional Assessment			
UCare	Doe	Jill	442345678	10/22/1941	Community				Mid-year	6/8/2026	Telephonic

Column Descriptions

Member Demographics
Delegate: Auto-populates when the delegate is selected in cell B3.
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 Institutionalized

Current Year Activity
Date of Current Activity Completed in [YYYY]: Enter the date of the current year's activity. Activity Location in [YYYY]
Selection options: In-Person, Televideo (audio and visual), and Phone
Type of the "Current Activity Completed in [YYYY]"
Selection options: Institutional Assessment, THRA (Institutional only)

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 Support Plan Update, 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
Name of Care Coordinator: First and last name
Comments – Use this cell to add notes, details, and other clarifying information as needed.

Additional Resources: [Transfer Member Job Aid-MSC+]
[Transfer Member Job Aid-Connect]
[Assessment Checklists]

Addendum A

Tips for Assessment Reporting on the Monthly Activity Log

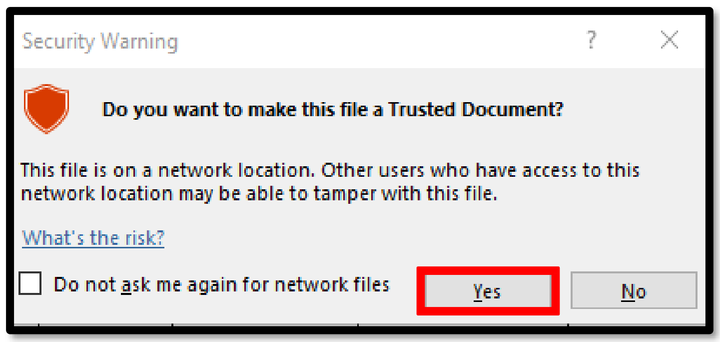
The intended purpose of the Monthly Activity Log (MAL) template is to provide a single place to track member assessment activity and support plan updates. Entering information in the correct format will help eliminate the need for corrections.

Handling security warnings

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

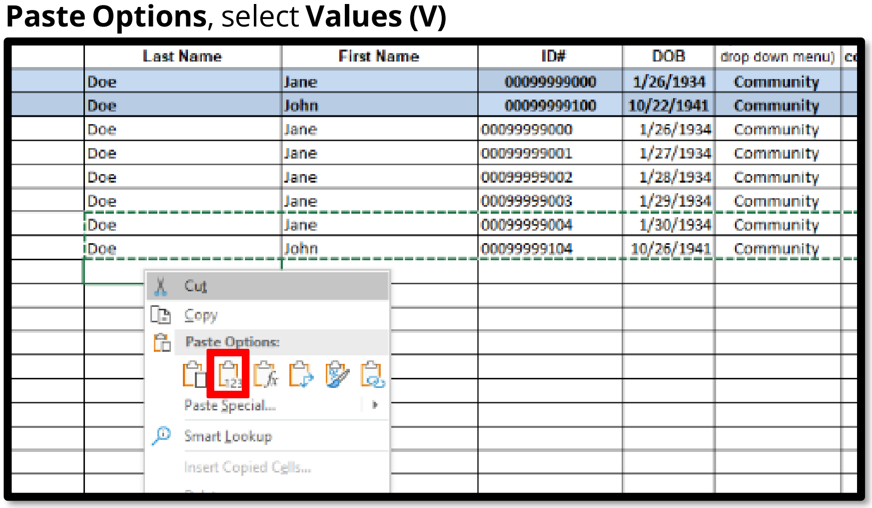
- Click *Enable Content*

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



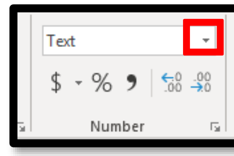
Pasting information into the template

- Only paste into columns B (Member Last Name) through F (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
  - Member Last Name
  - Member First Name
  - UCare Member ID
  - Member Date of Birth (DOB)
  - Living status – *community* or *institutionalized* are the only values allowed

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

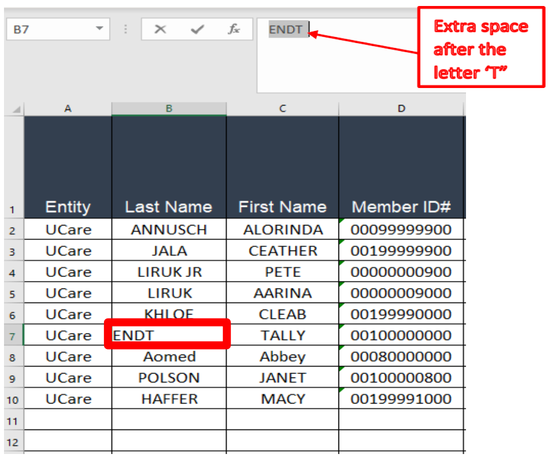
Addendum B

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

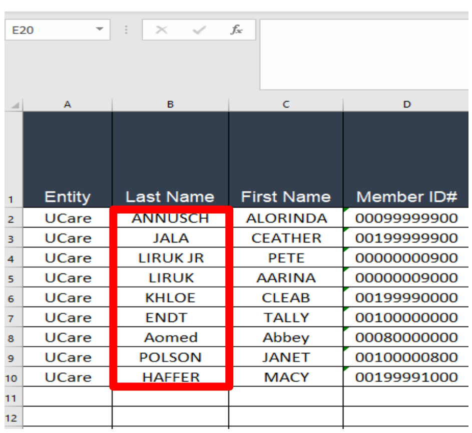
I. **Check the data for noise/extra space(s)**



	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

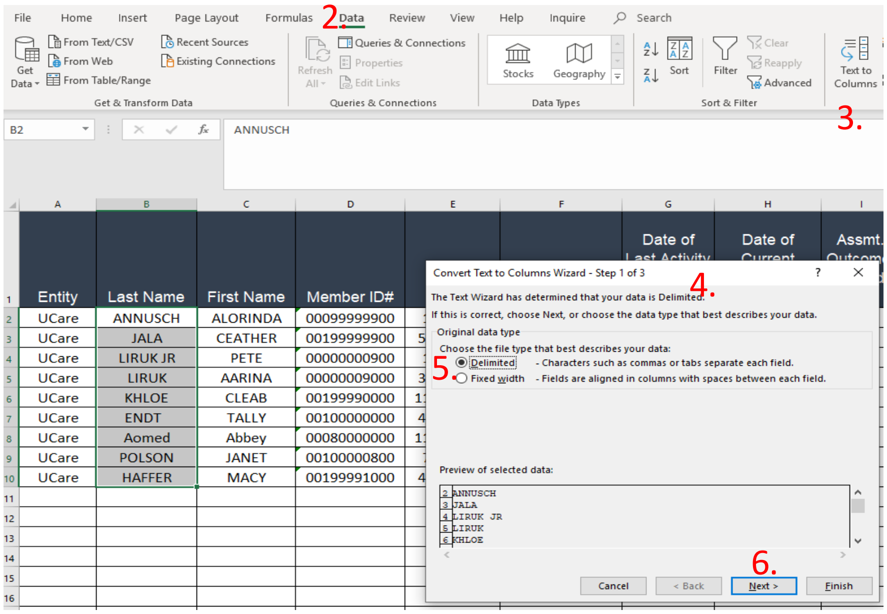
II. **Remove the noise/extra space**

1. Highlight the data cells. See the example in column B (Last Name)

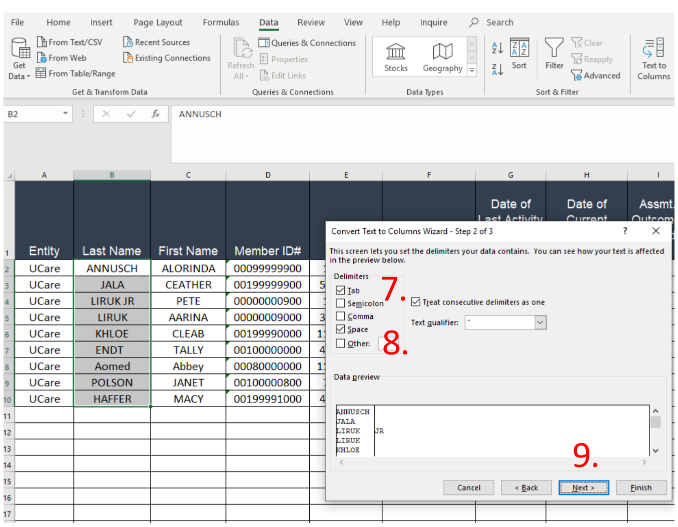


	Entity	Last Name	First Name	Member ID#
2	UCare	ANNUSCH	ALORINDA	00099999900
3	UCare	JALA	CEATHER	00199999900
4	UCare	LIRUK JR	PETE	00000000900
5	UCare	LIRUK	AARINA	00000009000
6	UCare	KHLOE	CLEAB	00199990000
7	UCare	ENDT	TALLY	00100000000
8	UCare	Aomed	Abbey	00080000000
9	UCare	POLSON	JANET	00100000800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

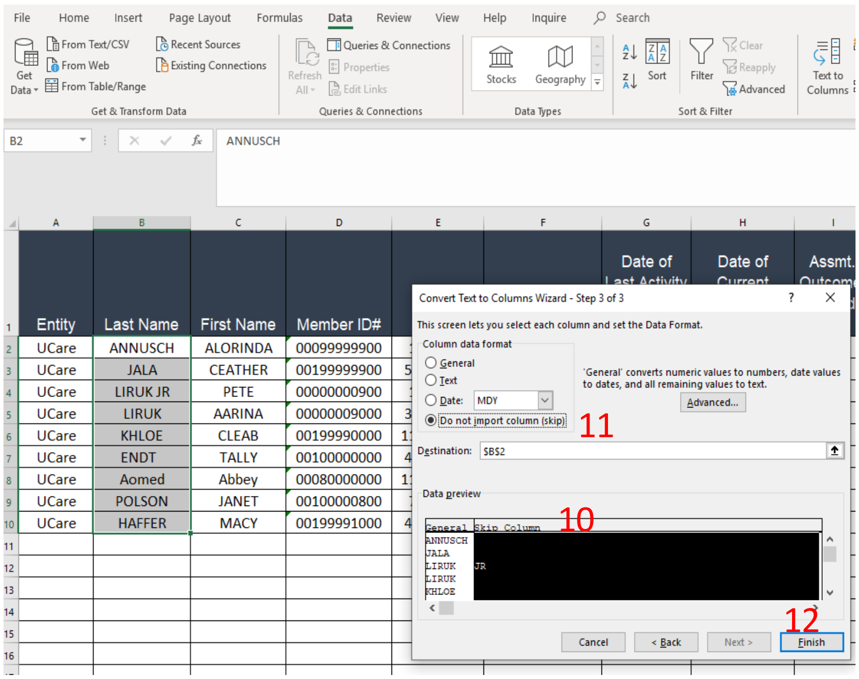
2. Select Data icon
3. Select the Text to Columns icon
4. The Convert Text to Columns Wizard – Step 1 or 3 appears
5. Select the “Delimited” radio button, if not selected
6. Click “Next” button



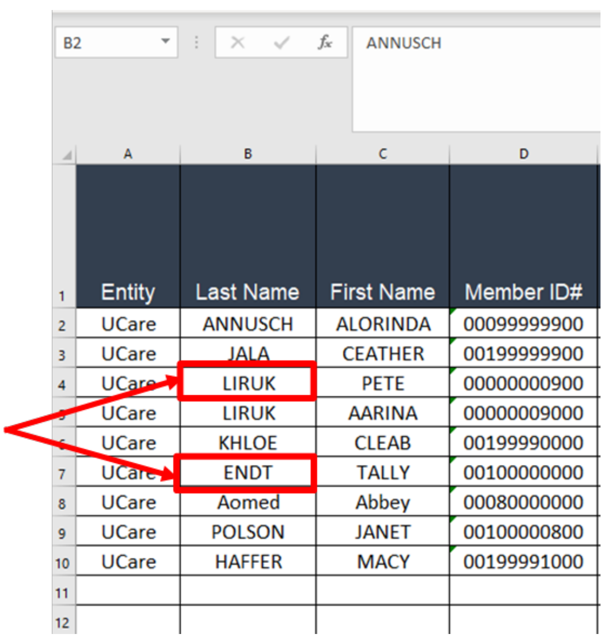
7. Click “Tab”
8. Click “Space”
9. Click “Next” button



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



12. Click the “Finish” button – the extra space is now removed!



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