

Connect & Connect + Medicare Activity Log

September 5, 2020



Purpose of the Log

- Update the monthly Roster/Enrollment file with the members current HS codes.
- Use for the Case Management Identification Model to determine a member suggested health status.
- Part C Special Needs Plans (SNP) Regulatory Reporting. The data is prepared and submitted to Centers for Medicare & Medicaid Services (CMS) Auditors for Connect + Medicare.
- CMS Data Validation audit also feeds into Star Rating measure of *SNP Assessment Reporting* for Connect + Medicare.

Validation Process



- Currently takes 4 hours to combine files and validate the data.
 - Validate the following data:
 - Assigned Assessor Entity
 - Member Last Name
 - Member First Name
 - UCare Member ID#
 - DOB
 - Status
 - Date of Last Activity completed in 2019
 - Date of Current Activity in 2020
 - HS Code



Data Validation Issues

- The log file is setup with data validation restrictions to ensure accuracy in the data entered, reduce the need for corrections and prevent sending the log file back to the user for clarifications.
- We know some of the delegates know how to work around the restrictions.
- As validation issues arise, **logs will be sent back** for corrections.

Copy and Paste Data into the log



- We know majority of you are copying and pasting data into the log, which is okay but it ...
 - Brings in “noise” from...
 - Email
 - Database
 - Software System
 - Etc.
 - Change/Override the format and validation restriction cells
- To prevent issues above, you will need to format the following columns before copying and pasting the data into the log (refer to tip sheet).
 - UCare Member ID# as a **“text”** format
 - DOB as a **“date”** format
 - Date of Last Activity completed in 2019 as a **“date”** format
 - Date of Current Activity in 2020 as a **“date”** format



New 2020 Activity Log

- File name: 2020 connect_monthlyactivitylog.xlsx
 - Consist of three workbooks/tabs:
 - CT + Medicare Activity log 2020
 - CT Expansion Activity log 2020
 - Connect Activity log 2020



2020 CTM Monthly Activity Log #1

2020 CONNECT + Medicare Monthly Activity Log								Drop Down Options	HS Code Key				
Month: <input type="text"/>								Status	HS Code	HS Code Definition			
								Institutionalized	AN	Assessed, Not interested in CC services			
								Community	HP	Member assessed and in need of CC services			
									LM	Member assessed and not in need of CC services, including TCM.			
									NI	Member not interested in assessment (Refusal)			
									NR	Unable to reach			
									GH	Group Home -Bluestone only			
Log all Completed Assessments or Refusals/Unable to Reach by the 15th of following month email to: connectintake@ucare.org by the 20th of the following month for the previous month's activity.													
See SAMPLE data on rows 17 and 21 (highlighted in light yellow)													
Assigned Assessor Entity	Last Name	First Name	UCare Member ID#	DOB	Status	Date of Last Activity completed in 2019	Date of Current Activity in 2020	HS Code (Select from the drop down menu)-	Last Name of Assessor (for Refusals or UTR list name of Scheduler)	First Name of Assessor (for Refusals or UTR list name of Scheduler)	Title of Assessor	Comments	
UCare	Smith	Sam	00101243600	1/1/1958	Institutionalized	9/7/2019	7/5/2020	LM	Brown	Molly	RN		
UCare	Jones	Bob	00101548600	10/6/1964	Institutionalized	9/8/2019	8/5/2020	NR	Stone	Sharon	LSW		
UCare	Sunshine	Suzy	00026878900	5/8/1974	Community	9/18/2019	9/1/2020	NI	Lee	Bruce	RN		
UCare	Buttons	Benjamin	00146523000	8/4/1978	Institutionalized	1/8/2019	1/5/2020	HP	Stallone	Sylvester	LSW		
UCare	Abdi	Mohammed	00016578200	1/1/1970	Community	2/8/2019	2/5/2020	LM	Letterman	David	RN		

↑
Workbook/tab



2020 CT EXP Monthly Activity Log #2

2020 CONNECT EXPANSION Monthly Activity Log								Drop Down Options		HS Code Key			
Month:								Status	HS Code	HS Code Definition			
								Institutionalized	AN	Assessed, Not interested in CC services			
								Community	HP	Member assessed and in need of CC services			
									LM	Member assessed and not in need of CC services, including TCM.			
									LU	Members on a waiver, Institutional			
									NI	Member not interested in assessment (Refusal)			
									NR	Unable to reach			

Log all Completed Assessments or Refusals/Unable to Reach by the 15th of following month
[email to: connectintake@ucare.org](mailto:connectintake@ucare.org) by the 20th of the following month for the previous month's activity.

See SAMPLE data on rows 17 and 21 (highlighted in light yellow)

Assigned Assessor Entity	Last Name	First Name	UCare Member ID#	DOB	Status	Date of Last Activity completed in 2019	Date of Current Activity in 2020	Assmt. Outcome: HS Code (Select from the drop down menu)	Last Name of Assessor (for Refusals or UTR list name of Scheduler)	First Name of Assessor (for Refusals or UTR list name of Scheduler)	Title of Assessor	Comments
UCare	Smith	Sam	00101243600	1/1/1928	Community	8/8/2019	7/5/2020	NI	Brown	Molly	RN	
UCare	Jones	Bob	00101548600	10/6/1954	Institutionalized	9/8/2019	8/5/2020	HP	Stone	Sharon	LSW	
UCare	Sunshine	Suzy	00026878900	5/8/1944	Community	9/18/2019	9/1/2020	LU	Lee	Bruce	RN	
UCare	Buttons	Benjamin	00146523000	8/4/1938	Institutionalized	1/8/2019	1/5/2020	AN	Stallone	Sylvester	LSW	
UCare	Abdi	Mohammed	00016578200	1/1/1932	Institutionalized	2/8/2019	2/5/2020	LM	Letterman	David	RN	

Workbook/tab



2020 CT Monthly Activity Log #3

2020 CONNECT Monthly Activity Log								Drop Down Options		HS Code Key			
Month:								Status	HS Code	HS Code Definition			
								Institutionalized	AN	Assessed, Not interested in CC services			
								Community	HB	High Need - Brain Injury-Member needs Care Coordination			
									HD	High Need - Development Disability-Member needs Care			
									HM	High Need - Mental Health-Member needs Care Coordination			
									HP	High Need - Physical Health -Member needs Care			
									LM	Member assessed and not in need of CC services, including			
									LU	Members on a waiver, Institutional			
									NI	Member not interested in assessment (Refusal)			
									NR	Unable to reach			
									GH	Group Home			
Log all Completed Assessments or Refusals/Unable to Reach by the 15th of following month email to: connectintake@ucare.org by the 20th of the following month for the previous month's activity. See SAMPLE data on rows 17 and 21 (highlighted in light yellow)													
Assigned Assessor Entity	Last Name	First Name	UCare Member ID#	DOB	Status	Date of Last Activity completed in 2019	Date of Current Activity in 2020	Assmt. Outcome: HS Code (Select from the drop down menu)	Last Name of Assessor (for Refusals or UTR list name of Scheduler)	First Name of Assessor (for Refusals or UTR list name of Scheduler)	Title of Assessor	Comments	
Axis	hith	Sam	00101243600	1/1/1951	Institutionalized	8/8/2019	7/5/2020	AN	Brown	Molly	RN		
BIAM	Jones	Bob	00101548600	10/6/1934	Community	9/8/2019	8/5/2020	HP	Stone	Sharon	LSW		
Bluestone	Sunshine	Suzy	00026878900	5/8/1954	Community	9/18/2019	9/1/2020	LU	Lee	Bruce	RN		
UCare	Buttons	Benjamin	00146523000	8/4/1948	Institutionalized	1/8/2019	1/5/2020	LU	Stallone	Sylvester	LSW		
Guild	Abdi	Mohammed	00016578200	1/1/1945	Community	2/8/2019	2/5/2020	LM	Letterman	David	RN		

↑
Workbook/tab

Log Data Entry (see examples on next slides)



2020 CONNECT + Medicare Monthly Activity Log							Drop Down Options		HS Code Key			
Month:							Status		HS Code	HS Code Definition		
							Institutionalized		AN	Assessed, Not interested in CC services		
							Community		HP	Member assessed and in need of CC services		
									LM	Member assessed and not in need of CC services, including TCM.		
									NI	Member not interested in assessment (Refusal)		
									NR	Unable to reach		
									GH	Group Home -Bluestone only		

Log all Completed Assessments or Refusals/Unable to Reach by the 15th of following month
 email to: connectintake@ucare.org by the 20th of the following month for the previous month's activity.
 See SAMPLE data on rows 17 and 21 (highlighted in light yellow)

Assigned Assessor Entity	Last Name	First Name	UCare Member ID#	DOB	Status	Date of Last Activity completed in 2019	Date of Current Activity in 2020	HS Code (Select from the drop down menu)-	Last Name of Assessor (for Refusals or UTR list name of Scheduler)	First Name of Assessor (for Refusals or UTR list name of Scheduler)	Title of Assessor	Comments
UCare	Smith	Sam	00101243600	1/1/1958	Institutionalized	9/7/2019	7/5/2020	LM	Brown	Molly	RN	
UCare	Jones	Bob	00101548600	10/6/1964	Institutionalized	9/8/2019	8/5/2020	NR	Stone	Sharon	LSW	
UCare	Sunshine	Suzy	00026878900	5/8/1974	Community	9/18/2019	9/1/2020	NI	Lee	Bruce	RN	
UCare	Buttons	Benjamin	00146523000	8/4/1978	Institutionalized	1/8/2019	1/5/2020	HP	Stallone	Sylvester	LSW	
UCare	Abdi	Mohammed	00016578200	1/1/1970	Community	2/8/2019	2/5/2020	LM	Letterman	David	RN	

AXIS
BECKER
BLUESTONE
CLAY
KOOCHICHING
LGP
LSS
MAHANOMEN

Institutionalized
Community

AN
HP
LM
NI
NR
GH

1. Enter the Current Month
2. Click drop down menu & select Delegate Name
3. Enter member Last Name
4. Enter member First Name
5. Enter 11 digits UCare Member ID#
6. Enter DOB mm/dd/yyyy
7. Click drop down menu & select living status
8. Enter Last 2019 Activity (only) mm/dd/yyyy
9. Enter 2020 Activity (only) mm/dd/yyyy
10. Click drop down menu & select HS code
11. Enter Assessor Last Name
12. Enter Assessor First Name
13. Enter Title of Assessor
14. Enter Comments, if needed



Log Data Entry #2

Do **not** leave blank

Do **not** enter initials, etc.

Select your entity from the drop down menu

Assigned Assessor Entity	
CTH	
UCare	<input type="button" value="v"/>



Log Data Entries #3 & #4

Do **not** leave last & first names blank

Last Name	First Name
	Bob
Buttons JR	Benjamin
Sunshine	Suzy

Do **not** add letters, numbers, etc. before/after the name

Do **not** add extra space(s) in front or behind the name. Please delete any extra spaces



Log Data Entry #5

Must be formatted as a "text" field to retain the leading zeros

Enter 11 digits
UCare Member ID#

UCare Member ID#	
009000000600	
009-000000-00	
9000000600	

Do **not** enter dashes in the UCare Member ID#

Missing the leading zeros, the "text" formatted cell was changed

Do **not** leave blank



Log Data Entry #6

Must be formatted as a "date" field

Enter DOB (mm/dd/yyyy)

Do **not** enter DOB as a "custom" field

Do **not** enter DOB as a "text" field

Do **not** leave blank

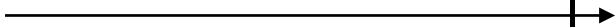
DOB
10/6/1964
4-Aug-78
27157



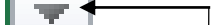
Log Data Entry #7

Status	
Community	▼
Institutionalized	▼

Do **not** leave blank



Select either "Community" or "Institutionalized" from the drop down menu





Log Data Entries #8 & #9

Must be formatted as a "date" field

Date of <u>Last</u> Activity completed in 2019	Date of <u>Current</u> Activity in 2020
9/8/2019	8/5/2020
1/8/2019	1/5/2020
9/18/2019	
	6/29/2020

Enter 2019 dates (only)

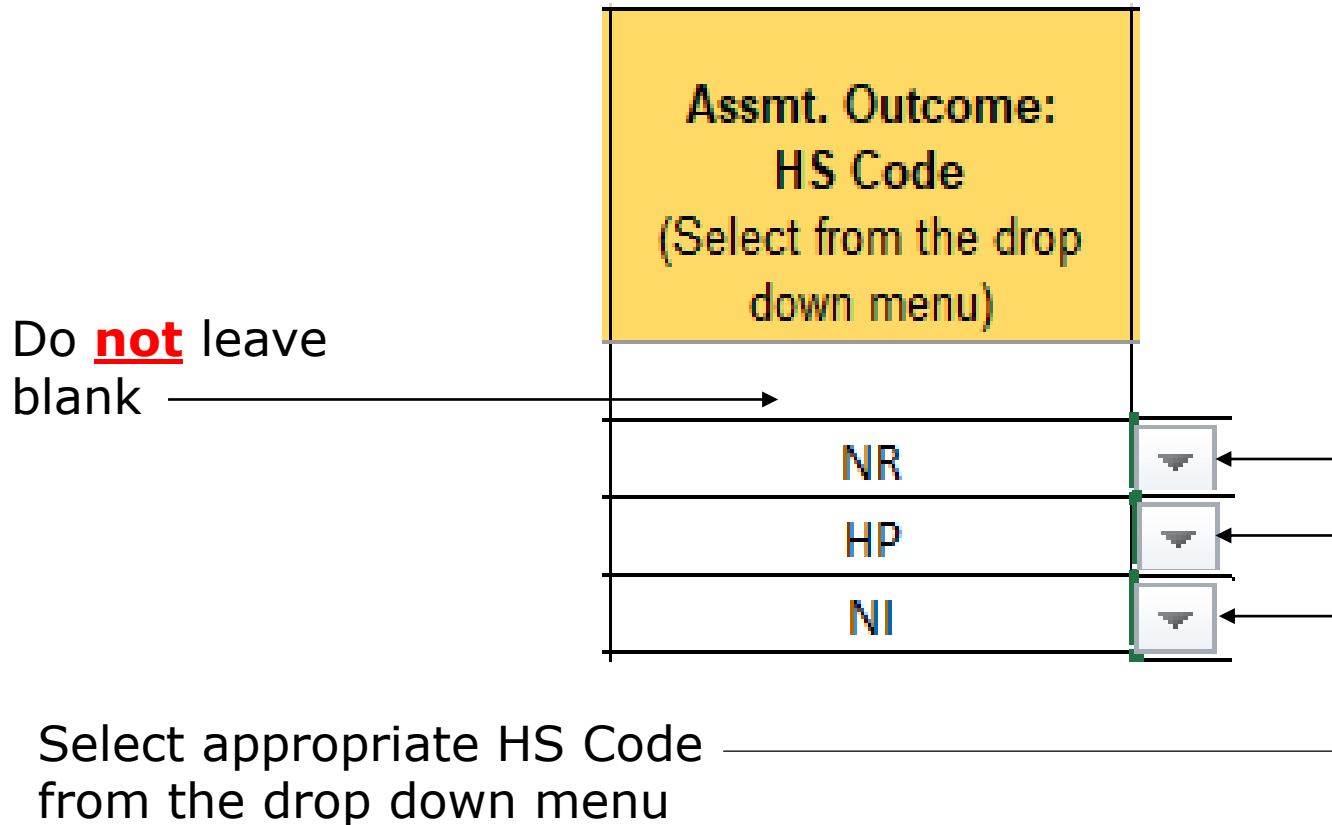
Enter 2020 dates (only)
Do **not** leave blank

Initial assessment leave blank

Do **not** enter any activities dates as a "custom" or "text" field. It must be formatted as a "date" field.



Log Data Entry # 10



If an assessment was **not** completed select either NR "Unable to reach" or NI "Member not interested in assessment (Refusal)". If an assessment was completed please select the appropriate HS code.



Summary

- Use the New 2020 Log and the appropriate workbook/tab
- Select your Entity
 - Do not leave blank
- Enter member last name. Make sure ...
 - Name is correct (no nicknames, Jr, etc.)
 - Not member first name
 - No blank rows
 - No extra space(s) either in front or behind the name. If you copy and paste the data make sure you have not brought in extra space(s).
- Enter member first name (same as above except). Make sure ...
 - Not member last name
- Enter 11 digits UCare Member ID#. Make sure ...
 - UCare Member ID# is correct
 - No blank rows
 - If you copy and paste the data, it must be formatted as a text to retain the leading zeros and not extra space(s).
- Enter DOB. It's formatted as a date. Make sure ...
 - DOB is correct



Summary (cont.)

- Enter DOB (cont.). Make sure ...
 - No blank rows
 - If you copy and paste the data, it must be formatted as a date
- Select the living status (Institutionalized or Community)
 - Do not enter anything else
 - Do not leave blank
- Enter the Date of Last Activity completed in 2019. The cell is formatted as a date
 - Do not enter any dates less or greater than 2019. Only 2019 dates.
- Enter the Date of Current Activity in 2020. The cell is formatted as a date.
 - Do not enter any dates less or greater than 2020. Only 2020 dates.
 - Do not leave blank
- Select Assmt. Outcome HS Code. Make sure ...
 - HS code is correct
 - No blank rows
- Enter Comments, if needed
 - Use this column for anything you want to note or comment
 - Do not add comments in any other columns/sections



Wrap up

- All logs need to be sent to Connectintake@ucare.org by the 15th of each month.
- Please review your data prior to submission.
- Data will be sent back if there are errors or clarifications needed.

