

UCare MSC+/MSHO

Care Coordination and LTSS

Title: Monthly Activity Log Job Aid

Purpose: To provide instructions for completing the MSC+ and MSHO Monthly Activity Log assessment, TOC and Mid- Year Support Plan update reporting.

Procedure:

The MSC+ and MSHO 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 MSC+ and MSHO health plans. Examples are provided in the top two 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
<p>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).</p>	

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: assessment conducted in February, is reported on log submitted by March 10th
 - If an assessment 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 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
- Annual Assessments: 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 G).
- 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.
- Add THRA activity for delegate-to-delegate transfers, product changes and New Members from FFS
 - Date of Current Activity Completed [YYYY] is the date of the THRA
 - **Product Change/FFS to MCO/MCO to MCO:** if a member has a current HRA/assessment and 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 "Date of Current Activity" as the last attempt to reach the member or date of refusal

Example:

Member Demographics						Current Year Activity		
Delegate	Last Name	First Name	UCare Member ID#	DOB	Living Status (Select from the drop down menu)	Date of Current Activity Completed in 2024	Activity Location in 2024	Type of Current Activity Completed in 2024
UCare	Doe	Jane	456987412	1/26/1936	Community	1/20/2024	Phone	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 MSC+/MSHO Monthly Activity Log
- **Do not** log delegate transfers when unable to be reached or refuses to complete THRA form
- Do not add Mid-Year Support Plan update information when unable to reach a member or member refuses update

Column Descriptions	
	<p>Member Demographics</p> <p>Assigned Assessor Entity: 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. Selections: Community or Institutionalized</p>
	<p>Current Year Activity</p> <p>Date of <u>Current</u> Activity Completed in [YYYY]: Enter the date of current year's activity. This includes assessment date, UTR final contact attempt/date letter sent or date of verbal decline of assessment. Activity Location in [YYYY] Selections are: In-Person, Televideo (audio and visual), Phone Type of <u>Current</u> Activity Completed in [YYYY] Selections: Annual, Initial, Product Change, Significant Health Change, THRA, THRA Attempted, Mid-Year, TOC/Support Plan Update, Refusal, Unable to Reach</p>
	<p>Unable to Reach only: J - L Enter attempt dates for members unable to be reached for assessment.</p>
	<p>Care Coordinator</p> <p>First/Last Name of Care Coordinator Comments – Use this cell to add notes, details and other clarifying information as needed.</p>

Addendum A

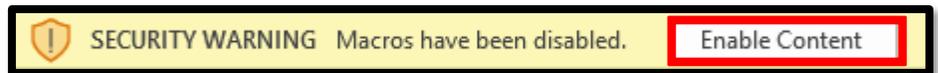
Tips for Assessment Reporting on the Monthly Activity Log

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.

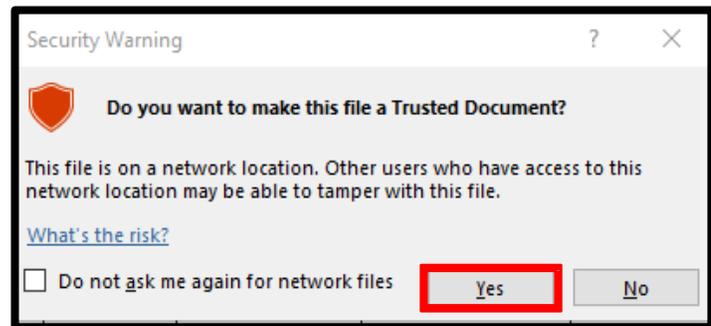
Handling security warnings

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

- Click *Enable Content*



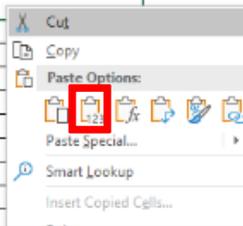
- In the Security Warning pop up window, click Yes



Pasting information into the template

- Only paste into **columns 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)**

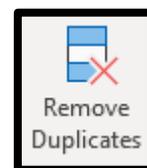
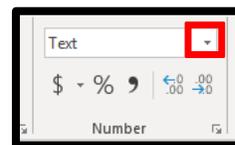
	Last Name	First Name	ID#	DOB	drop down menu)	cc
	Doe	Jane	00099999000	1/26/1934	Community	
	Doe	John	00099999100	10/22/1941	Community	
	Doe	Jane	00099999000	1/26/1934	Community	
	Doe	Jane	00099999001	1/27/1934	Community	
	Doe	Jane	00099999002	1/28/1934	Community	
	Doe	Jane	00099999003	1/29/1934	Community	
	Doe	Jane	00099999004	1/30/1934	Community	
	Doe	John	00099999104	10/26/1941	Community	



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
 - 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

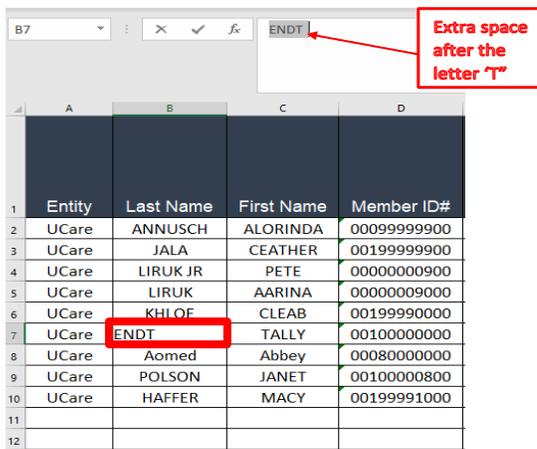


Addendum B

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:

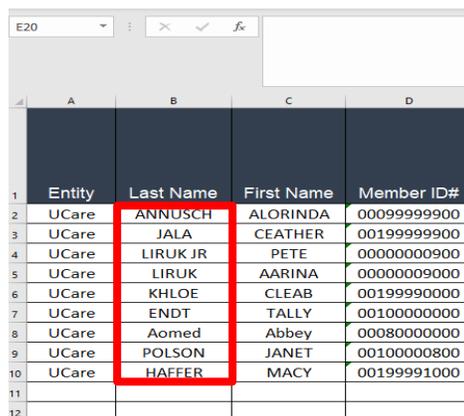
- Last Name
 - First Name
 - Member ID
 - DOB
- I. Check the data for noise/extra space(s)



Entity	Last Name	First Name	Member ID#
UCare	ANNUSCH	ALORINDA	00099999900
UCare	JALA	CEATHER	00199999900
UCare	LIRUK JR	PETE	00000000900
UCare	LIRUK	AARINA	00000009000
UCare	KHLOE	CLEAB	00199990000
UCare	ENDT	TALLY	00100000000
UCare	Aomed	Abbey	00080000000
UCare	POLSON	JANET	00100000800
UCare	HAFFER	MACY	00199991000

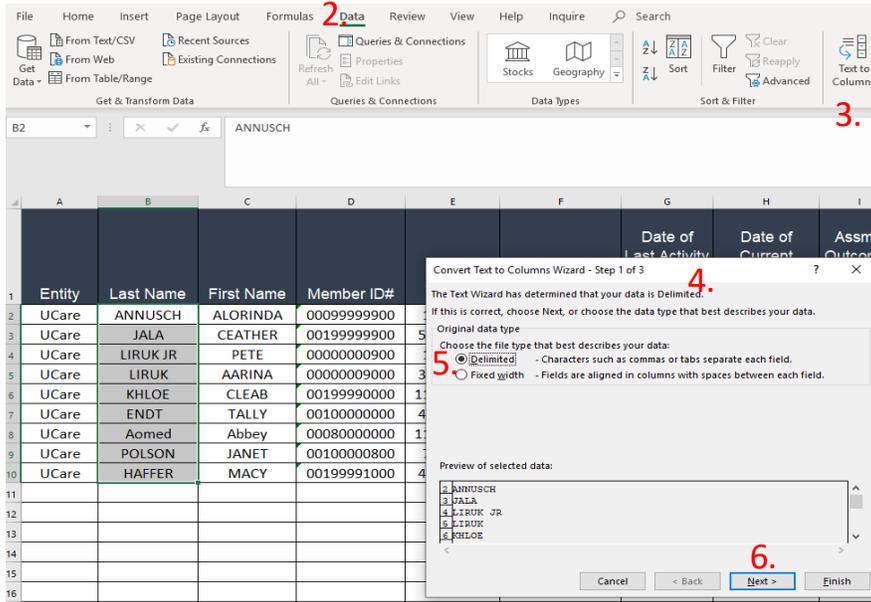
- II. Remove the noise/extra space

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

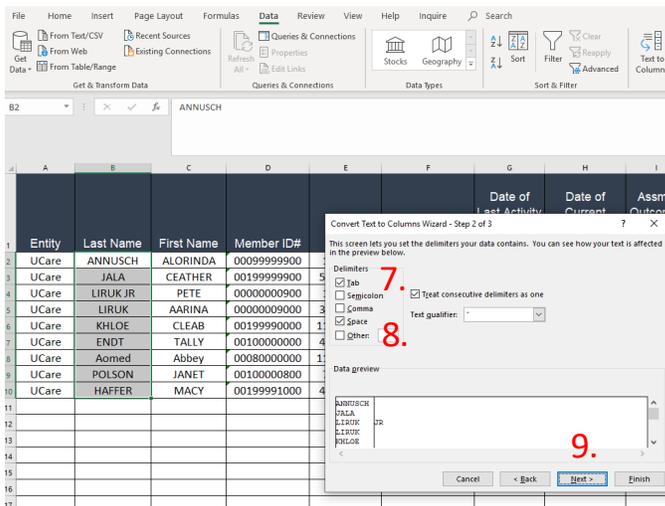


Entity	Last Name	First Name	Member ID#
UCare	ANNUSCH	ALORINDA	00099999900
UCare	JALA	CEATHER	00199999900
UCare	LIRUK JR	PETE	00000000900
UCare	LIRUK	AARINA	00000009000
UCare	KHLOE	CLEAB	00199990000
UCare	ENDT	TALLY	00100000000
UCare	Aomed	Abbey	00080000000
UCare	POLSON	JANET	00100000800
UCare	HAFFER	MACY	00199991000

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

Convert Text to Columns Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

General
 Text
 Date: MDY
 Do not import column (skip)

Destination: \$B\$2

Data preview

General Skip Column

ANNUSCH
 JALA
 LIRUK JR
 LIRUK
 KHLOE

10 11 12

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

Entity	Last Name	First Name	Member ID#
UCare	ANNUSCH	ALORINDA	00099999900
UCare	JALA	CEATHER	00199999900
UCare	LIRUK	PETE	00000009000
UCare	LIRUK	AARINA	00000009000
UCare	KHLOE	CLEAB	00199990000
UCare	ENDT	TALLY	00100000000
UCare	Aomed	Abbey	00080000000
UCare	POLSON	JANET	00100000800
UCare	HAFER	MACY	00199991000

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