

Tips for Part C delegates (MSHO members)

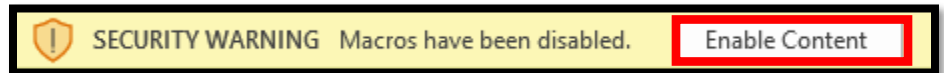
Care coordinator using the log for activity tracking

This is the intended purpose of the log template. Individual care coordinators enter information in the correct format therefore eliminating the need for corrections.

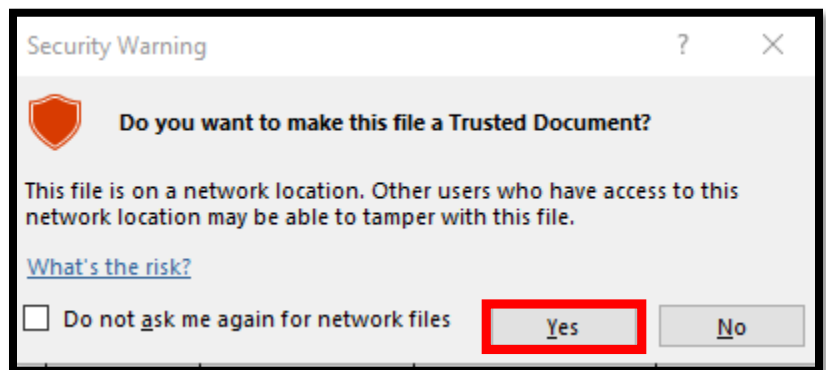
Handling security warnings

When you open the log template, the yellow message bar may appear with a shield icon and the Enable Content button.

- Click *Enable Content*



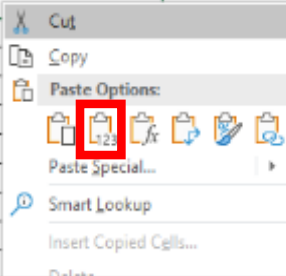
- In the Security Warning pop up window, click Yes



Pasting information into the template

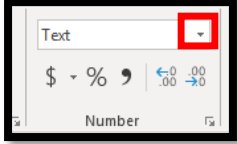

- Only paste into columns B (Member Last Name) through K (Comments). Do not paste over column A (Delegate Name).
- After copying information from the source document, **right click** in the target cell on the log template
- Under **Paste Options**, select **Values (V)**

	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	



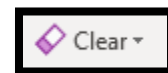
Aggregating information from different sources

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 11 digits including leading zeros
 - 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)
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- Cells in the following columns contain key information that should not be missing:
 - Member ID
 - Member Last Name
 - Member First Name
 - Member Date of Birth (DOB)
 - Date of current activity – in 2020
 - Type of activity – *assessment*, *refusal* and *unable to reach* are the only values allowed
 - 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



Reporting date of deaths and new members

This is not necessary as UCare has the information