

Time and Task Reporting for Dementia Care Specialists

The guidance contained within this TA is only meant to be utilized by dementia care specialists (DCS). All other ADRC and ADRS staff who time report should refer to the general Time and Task Reporting Technical Assistance document [P-02009 Volume 2020 Issue 5](#).

DCS should utilize categories 1-5 and category 6 when working directly with or on behalf of a customer. When providing or attending marketing, outreach, training and/or working with groups or committees to the community’s knowledge and/or dementia efforts, time should be captured in the “other programs” category which has been renamed for use by the DCS. Paid time off should be recorded in category 8b and compensatory time should be recorded in the “Comp Taken” column.

Category 1: Medical Services Administration

Discussions about Medicaid or a Medicaid related program (MRP), any service those programs provide, and enrollment requirements to get enrolled into those program(s).

Medicaid/Medicaid Related Programs (MRP) (This is not an all-inclusive list):

Adoption Assistance Medicaid	Medicare Part D (with dual eligible)
BadgerCare Plus	Minimum Data Set-Section Q
EBD Medicaid	Qualified Medicare Beneficiary (QMB)/Specified
Family Care	Low Income Beneficiary (SLMB)
Foster Care Medicaid	Program of All-Inclusive Care for the Elderly (PACE)
Healthy Start for Pregnant Women	Partnership
Institutional Medicaid	SeniorCare (Level 1, 2a, 2b or 3)
Include, Respect, I Self-Direct (IRIS)	SSI (if for Medicaid eligibility)
Katie Beckett Medicaid	SSI-E
Medicaid with a Deductible	Wisconsin Well Woman
Medicaid Purchase Plan (MAPP)	

- **Appeals:** Providing information, assistance, and advocacy on appeals needed for Medicaid or MRP eligibility.
- **Benefit Check-Up:** Checking program criteria for potential Medicaid or MRP eligibility.
- **Citizenship or Alien Status:** Assisting a customer with necessary citizenship or alien status determinations needed for Medicaid eligibility.
- **Disenrollment:** Discussing a disenrollment due to loss of eligibility and conversation is about how to maintain long-term care program eligibility.
- **Early Identification:** Reviewing a customer’s financial status to determine how/when the customer may be eligible for Medicaid or an MRP.
- **Education:** Providing information to an individual about Medicaid or an MRP.
- **Eligibility Status:** Verifying an individual’s Medicaid eligibility status in Forward Health or CARES.
- **Enrollment Counseling:** Discussing long-term care (LTC) program options (Family Care, IRIS, Partnership, PACE) and/or managed care organizations (MCO)/independent consultant agency (ICA) options within one of the LTC programs.
- **Income Maintenance:** Communicating with IM regarding Medicaid or an MRP.
- **Information and Assistance:** Discussion about Medicaid or an MRP, including providing a Medicaid application. (Assisting with completing the application is cat. 4.)

- **Minimum Data Set-Section Q (MDS-Q) or MDS-Q Like Activities:** Providing information about community service options to a resident of a nursing home.
- **Moves:** Providing enrollment options to a person currently enrolled with a MCO or ICA when voluntarily moving from one county to another county to assure continuity of care.
- **Pre-Admission Consultation (PAC) or PAC-Like Activities:** Providing information about service options to a customer, who is considering or has recently moved to assisted living, for the purpose of delaying or preventing their need for Medicaid.
- **Paperwork, Data Entry, Reporting:** Performing the following: paperwork, data entry, and reporting related to activities listed in this section.
- **Social Security Account:** Establishing a personal social security account for an individual for the purposes of obtaining Medicaid benefits.
- **Translation:** Arranging translation services to provide information about Medicaid or an MRP.
- **Travel:** Traveling to provide information about Medicaid, MRP, or long-term care functional screen LTCFS.

Category 2: Medical Services Coordination

Discussions about individual services such as home care, assisted living facilities, housekeeping, etc., outside the context of a program. Select 2A when assisting a customer that is a Medicaid recipient or 2B when assisting a customer that is not a Medicaid recipient.

Individual Services Examples (This is not an all-inclusive list):

<ul style="list-style-type: none"> Adult day care Assisted living facilities (CBRFs, RCACs, AFHs) Durable medical equipment Home delivered meal program Hospice care Mental health and substance use services Personal care worker services (PCW) Physician, dentist or other primary care provider 	<ul style="list-style-type: none"> Services covered by Forward Health card Skilled nursing facilities (nursing homes, ICF-MR, and state centers) Supportive home care (SHC) Therapies (i.e., occupational, physical, speech and language) Transportation (medical)
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- **Care Meetings:** Participating in care meetings to coordinate or review an individual's need for services.
- **Complaints:** Receiving complaints about service providers, MCOs, IRIS, or the ADRC.
- **Dementia (Memory) Screens:** Screening of individuals to identify dementia and refer appropriately.
- **Disease Control and/or Prevention:** Sharing educational information, with an individual, aimed at disease control or prevention.
- **Disenrollment Counseling:** Discussing how to maintain Medicaid services after disenrollment from a long-term care program. Typically, disenrollment is voluntary.
- **Early Diagnosis Activities:** Identifying actions that may lead to a diagnosis of a future health problem and/or early treatment to avoid or prevent serious health problems.
- **Follow-Up:** Performing follow-up activities to assure an individual is connected with the services they need.
- **Locate Providers:** Assisting an individual to find service providers to meet his/her needs.
- **Moves:** Assisting a customer with locating services when moving from one county to another.
- **Paperwork, Data Entry, Reporting:** Performing the following: paperwork, data entry, and reporting related to activities listed in this section.
- **Short-Term Services:** Assisting individuals in the ADRC target populations, who do not receive case management from another source, to access Medicaid services.

- **Translation:** Arranging translation services to provide information about Medicaid related services.
- **Transportation:** Arranging medical transportation services.
- **Travel:** Traveling to provide information about Medicaid related services.

Category 3: Functional Screen

Activities necessary to administer and calculate a Long Term Care Functional Screen.

- **Data Entry:** Entering information and the calculation of the LTCFS.
- **Gathering Information:** Gathering information from collateral contacts or medical professionals in order to complete the LTCFS.
- **Paperwork, Data Entry, and Reporting:** Performing the following: paperwork, data entry, and reporting related to activities listed in this section.
- **Performance:** Completing the customer interview to gather information for the LTCFS.
- **Travel Time:** Traveling to administer the LTCFS.

Category 4: Data Gathering

Assisting a customer with completing and obtaining paperwork in order to obtain full benefit Medicaid.

- **Medicaid Application:** Assisting a customer with the completion of a Medicaid application.
- **Medicaid Eligibility Maintenance:** Completing activities specific to a Medicaid review, e.g., assisting a customer to sign the signature page of a Medicaid application and/or gathering verifications.
- **Tracking:** Checking CARES Worker Web to track a customer's Medicaid application.
- **Travel:** Traveling to assist a customer with completing a Medicaid application.
- **Verifications:** Assisting a customer to gather documents needed to support a Medicaid application.

Category 5: Non-Allowable Medical Services Activities

Discussions about programs unrelated to Medicaid. When Medicaid is involved, a different category should be selected.

- **Adult Protective Services (APS) or Elder Abuse (EA):** Referring a customer for APS or EA services.
- **Advocacy:** Providing referrals to advocacy organizations or advocacy unrelated to Medicaid.
- **Caregiver Program:** Providing information on caregiving programs, such as AFCSP or NFCSP.
- **Food:** Providing information about food and nutrition resources including Food Share program, food pantries and emergency food.
- **General Information:** Providing service information about non-Medicaid services (e.g., housing options, evictions, energy assistance.)
- **Guardianship:** Providing information about guardianship.
- **Health Insurance Marketplace:** Providing information and assistance on all aspects.
- **Legal Questions:** Responding to non-Medicaid related legal inquiries, i.e., estate planning.
- **Loan Closets:** Sharing information about, gathering equipment, completing paperwork for usage of items in the loan closet.
- **Medical Directives:** Providing information about health care or financial power of attorney, living will, etc.
- **Medicare:** Providing information about Medicare.
- **Medicare Part D:** Assisting a customer, who is not dual eligible, find a Part D plan. If dual eligible then time is recorded in Category 1.

- **Non-Medicaid Program Referrals:** Providing information or referrals for errand services, rides for people to get out to vote, pet care referrals, etc.
- **Recreation:** Providing recreational information, organizing, hosting, or providing information about volunteer programs, educational (non-health related) programs, social gatherings, etc.
- **Retired and Senior Volunteer Program (RSVP):** Providing information or referral to the RSVP or like program.
- **Senior Centers:** Providing information about senior centers and non-Medicaid programs they sponsor.
- **SSDI:** Discussing or assisting with a SSDI application.
- **Transportation:** Providing information about non-medical transportation.
- **Veteran Benefits:** Providing information or assistance with VA benefits.
- **Vocational Rehabilitation:** Providing information or referrals to Division of Vocational Rehabilitation.

• Category 6: Case Identifier

A customer's first and last initial or "anonymous" is required for all time in which interactions with or on behalf of a specific customer take place. For DCS, customer initials or "anonymous" will always be entered into Category 6 when time is captured in categories 1, 2, 3, 4, or 5.

Category 8B: Paid Time Off (PTO)

Time when an employee is not working but is receiving compensation through his/her employer.

- Holidays or paid time off
- Sick days
- Personal or discretionary days
- Vacation time

EXCEPTION: Comp Time taken should be recorded to the far right of the daily log.

Do not record unpaid time (e.g., unpaid lunches, unpaid breaks, unpaid leave, furlough days.)

Other Programs: Dementia Care Specialist

Column A is specifically identified to be used by the DCS staff to record activities where the DCS is not working with or on behalf of a specific customer.

- **Agency Collaboration:** Working with other agencies to improve dementia awareness.
- **Committees, Meetings or Planning Groups:** Participating in committees, meetings or planning groups aimed at improving access to services (e.g., Dementia Friendly Communities, Memory Care Connections (when discussing with a group)).
- **County- or Employer-Specific Information:** Learning about procedures for employment, employer specific insurance or benefit fairs, annual trainings such as HIPAA, Discrimination and/or Harassment Prevention, Workplace Violence and Threats, etc.
- **Dementia Resource Materials:** Updating or writing materials for ADRC staff or the community.
- **General Administrative Duties:** Typing agendas or minutes, copying materials, typing a column for a newsletter, gathering or providing data, etc.
- **Health Care Data:** Identifying and analyzing service gaps, in general, which could affect both Medicaid and non-Medicaid services.
- **Memory Screen Fidelity Checks:** Reviewing memory screens of ADRC staff for accuracy. (Shadowing memory screeners is captured in 2A/B).

- **Outreach and Marketing:** Developing, distributing, or presenting information about dementia programs or the ADRC.
- **Paid Breaks:** Time during the workday when a break is considered paid work time.
- **Programming:** Planning, scheduling, and assisting with programs that help create dementia awareness and support (e.g., virtual dementia tours, memory cafés, dementia friendly communities, etc.)
- **Quality Improvement:** Participating in projects to improve ADRC processes. Regardless of the type of QI project, DCS should capture time in this category.
- **Staff Meetings:** Participating in ADRC staff meetings (unless time specific to a specific customer).
- **Staff Meetings:** Participating in employer- or county-specific meetings not related to ADRC activities.
- **Time and Task Reporting:** Completing time reporting tasks that do not fit in another category.
- **Training Provided by DCS:** Planning, creating materials, scheduling, and providing training to ADRC staff or to community members.