

Time and Task Reporting

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 and 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 or when the customer may be eligible for Medicaid or an MRP.
- **Education:** Providing information to an individual or the public 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 Organization (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:** Discussing Medicaid or an MRP, including providing a Medicaid application. (Assisting with completing the application is Cat. 4).
- **Long-Term Care Functional Screen (LTCFS) Activities:** Discussing activities related to the LTCFS **except** administering and calculating the LTCFS (e.g., consultation with a colleague or DHS, discussion of the screen at a staff meeting or with a MCO/ICA, follow-up with the customer/family re: results, LTCFS meetings, webcasts, Continuing Skills Testing (CST), studying for the CST.), screen lead quality checks.
- **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.

- **Outreach and Marketing:** Developing, distributing, or presenting Medicaid outreach materials, such as brochures, handouts, or other documentation. Marketing activities for ADRC.
- **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 and Reporting:** Performing the following: paperwork, data entry, and reporting related to activities listed in this section.
- **Program Participation System (PPS):** Entering information into PPS for the adult long-term care waiting list.
- **Quality Improvement:** Participating in projects regarding improvements specific to the Medicaid/MRP process or long-term care functional screen (LTCFS) process.
- **Social Security Account:** Establishing a personal social security account for an individual for the purposes of obtaining Medicaid benefits.
- **Training:** Attending Medicaid, MRP, or LTCFS trainings.
- **Translation:** Arranging translation services to provide information about Medicaid or an MRP.
- **Travel:** Traveling to provide information about Medicaid, MRP, or LTCFS or to attend trainings about Medicaid, MRP, or 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-I/DD, 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:** Conducting prevention programs or sharing educational information with individuals 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.
- **Health Care Data:** Identifying and analyzing service gaps which affect Medicaid service gaps.
- **Locate Providers:** Assisting an individual to find service providers to meet his or her needs.
- **Moves:** Assisting a customer with locating services when moving from one county to another.

- **Paperwork, Data Entry, and Reporting:** Performing the following: paperwork, data entry, and reporting related to activities listed in this section.
- **Resource Database:** Researching and entering service information into the resource database. Time is divided between 2A and 2B depending on if the service can be covered by Medicaid or not.
- **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:** 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, 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 Care Data:** Identifying and analyzing service gaps unrelated to Medicaid.
- **Health Insurance Marketplace:** Providing information and assistance, training 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.
- **Support Groups:** Organizing or facilitating family, caregiver or individual support groups.
- **Training:** Attending or providing training specific to Medicare.
- **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 (DVR), employment assistance, etc.

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.

Category 8A: General Administration

Activities such as staff meetings, or general administration, or training specific to ADRC staff to help employees do their job better (except Medicaid, LTCFS-cat. 1 and Medicare training-cat. 5).

- **Committees, Meetings or Planning Groups:** Participating in committees, meetings or planning groups aimed at improving access to services.
- **County/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.
- **General Administrative Duties:** Typing agendas or minutes, copying general resource materials, typing a column for a newsletter, gathering or providing data to boards, etc.
- **Paid Breaks:** Time during the work day when a break is considered paid work time.
- **Quality Improvement:** Participating in projects to improve ADRC processes. (Projects specific to the Medicaid and MRP process or LTCFS are Category 1).
- **Staff Meetings:** Participating in ADRC staff meetings (unless time specific to another category).
- **Staff Meetings:** Participating in employer- and/or county-specific meetings not related to ADRC activities.
- **Time and Task Reporting:** Completing time reporting tasks that do not fit in another category.

- **Trainings:** Attending trainings to help ADRC staff do their jobs better, except Medicaid and LTCFS trainings (Category 1) or Medicare trainings (Category 5).
- **Work with Other Agencies:** Working to improve service delivery and expand access, such as TAC and I-Team meetings.

Category 8B: Paid Time Off (PTO)

Time when an employee is not working but is receiving compensation through his or 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.

Other Programs Columns

Non-ADRC related tasks. Columns should be labeled by the local ADRC

Do Not Record Unpaid Time (e.g., unpaid lunches, unpaid breaks, unpaid leave, furlough days)