

Time and Task Scenarios for Categories 2 and 5

These scenarios are based on the Time and Task Reporting Focus Days, categories 2 and 5.

1. Referral for vocational rehabilitation

You meet with a customer who sustained a significant injury that no longer allows them to return to work with their previous employer. The customer shares that they have an interest in auto mechanics. Maybe they'd like to pursue being a diesel mechanic, but they know it may require training, certification, and tools. In discussing employment options, you share information about vocational rehabilitation and discuss the services that can be provided through Division of Vocational Rehabilitation (DVR). The customer is interested in pursuing this, and you provide them with the application information to get started.

Q: In which category do you record your time?

A: Category 5

Explanation: Vocational rehabilitation, such as services provided through DVR to assist people with disabilities find, keep, or gain a better job, is recorded in category 5.

2. Assisted living facilities

A customer's daughter calls the ADRC and is seeking information about assisted living options for her dad. You gain information from her that indicates that this customer has sufficient funds to privately pay for his needs for the next several years. You provide information related to supportive home care services, adult day care centers, and options to continue to support him in his home, but she feels that assisted living would be the best option for him. You offer to provide her with a list of the facilities in the area, as well as refer her to your online resource directory. She requests that you mail a copy of the resource directory to her dad's home so that she can review the options with him.

Q: In which category do you record your time?

A: Category 2B

Explanation: After gaining information about his ability to privately pay, you know that he's not a current Medicaid recipient. Discussing the services - assisted living, adult day care, and supportive home care - was related to the individual service options available, so all your time would be recorded in category 2B.

3. Veteran benefits and medical transportation

Scenario 1: You receive a call from a spouse, and the spouse feels that her husband needs more care and services than what he's currently receiving from Veterans Affairs (VA). He receives a small VA pension and 10 hours per week of supportive home care (SHC). You learn that she hasn't contacted them to see if he'd be eligible for additional supports or services in their home, or an increased financial benefit, which may allow private pay for additional services. She's unsure whom she would need to contact about this, so you provide her with the contact number for the local veterans' service office (VSO), to further discuss his current benefits, eligibility for other VA benefits, and how to request an increase in SHC benefits. She hopes to make those connections this week, so you ask if you can make a follow-up call to her within two weeks to see how it went and if additional options are needed. She indicates agreement with this plan.

Q: In which category do you record your time?

A: Category 5

Explanation: Although her initial request was about additional supportive services in the home for her husband, during the conversation with her, you focused on the VA connection that already exists to provide more supportive home care.

Scenario 2: Two weeks later, you call her for follow up, and she indicates that they met with the VSO and applied for an Aid and Attendance Benefit. They also contacted the VA social worker to gain increased SHC services. In addition, she asks about transportation to a specialist appointment that he has in three weeks. The specialist is at a provider in a neighboring county. She doesn't feel comfortable driving him there and they don't have family that can take time off work to take him instead. You talk with her to see if this appointment is something that the VA SHC worker could provide transportation to and from. You then provide her with other transportation options including private pay as well as a volunteer driver program through a local organization. She indicates that she's going to contact the VA social worker about the transportation first, and then will call the other options if needed. During this 15-minute follow-up call, five minutes was spent discussing VA benefits, and 10 minutes was spent discussing transportation options for the specialist appointment.

Q: In which category do you document your time?

A: Category 2B

Explanation: Although you did complete follow up about the VA benefits and SHC services, most of your contact revolved around transportation options. Since you didn't discuss Medicaid at all, and don't know if this customer has Medicaid, you record in category 2B.

4. Guardianship and legal issues

You receive a referral from a Children's Long-Term Support (CLTS) program case worker for an 18-year-old youth who recently moved to your county and needs to pursue adult long-term care (LTC) programs to transition from CLTS. You follow up with the parent to start the referral. You spend most of your contact with the parent discussing the youth's needs and diagnosis, adult LTC programs, and functional and financial eligibility. The parent also shares that because of their move and life situation, they never pursued guardianship when the youth turned 18 a few months ago, and it's something that has been recommended by others. You discuss guardianship and how adult protective services (APS) can assist with providing more detailed information for them. You also provide information about supported decision making and power of attorney for finances and healthcare. You schedule an appointment to meet with the customer and the parent to pursue options counseling and a long-term care functional screen (LTCFS) interview if the youth is interested and agreeable, and then offer to mail them information on the LTC programs and legal decision-making options. The parent indicates that they'd appreciate receiving the information before the appointment to review. You spent approximately 30 minutes gathering and discussing information about LTC programs, and 15 minutes talking about guardianship and legal decision making.

Q: In which category(ies) do you record your time?

A: Categories 1 and 5

Explanation: The 30 minutes you spent discussing LTC programs and eligibility is captured in category 1, and the 15 minutes you spent discussing guardianship, legal decision-making options and APS falls into category 5.

5. Achieving a Better Life Experience (ABLE) account and special needs trust (SNT)

You are working with a customer whose parent wants information about setting up an Achieving a Better Life Experience (ABLE) account or special needs trust (SNT) once guardianship is in place, so that all the customer's assets won't be considered countable assets for Medicaid eligibility purposes. Once this is completed, the guardian will assist the customer in pursuing publicly funded long-term care, because then the customer's countable assets would be below the Medicaid asset limit.

Q: In which category would you record your time?

A: Category 1

Explanation: Because the context of the discussion about ABLE accounts and SNT is related to gaining future MA eligibility to pursue publicly funded LTC programs, your time is recorded in category 1.

6. Dental care and locating providers

Scenario 1: A customer calls and needs to have a tooth pulled. You learn from the customer that they are in an SSI HMO, so you encourage them to contact their SSI HMO provider to gain a list of dental providers within their network. Your agency also has a list of dental providers who offer services to individuals who have Medicaid, as well as available community dental clinics, and you offer this list to the customer.

Q: In which category do you record your time?

A: Category 2A

Explanation: Dental services are coverable by Medicaid, and because you are assisting a customer to locate providers, you'd document your time in category 2. Because you know this customer is a current Medicaid recipient, you would select category 2A.

Scenario 2: A customer calls and needs to have a tooth pulled. They have Medicare Parts A and B, a Medigap policy, and Medicare Part D for prescription coverage. The customer does not have Medicaid coverage and doesn't have dental insurance with their Medicare coverage. You provide the listing of dental providers who offer services to under or uninsured individuals, and providers who run community dental clinics.

Q: In which category do you record your time?

A: Category 2B

Explanation: Dental services are a Medicaid-related service in category 2 - physician, dentist, or other primary care provider. Since this person is not a current Medicaid recipient, you would select category 2B.

7. SSDI appeal

You meet with a customer who needs assistance with their appeal for disability benefits. This is a request for reconsideration for SSDI only. The customer has a 401K with assets well over the SSI asset limit of \$2000. You help submit their appeal online and complete releases so that you can gain a copy of their file from the Social Security Administration (SSA).

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Q: In which category do you record your time?

A: Category 5

Explanation: SSDI applications and appeals are recorded in category 5 because there is no direct Medicaid eligibility component with a positive determination for SSDI benefits.

Additional information: Assisting with an SSI/SSDI concurrent application or appeal is recorded in category 4.

8. Resource database

You keep your agency's resource database up to date, so that when staff utilize it to provide referrals for customers, they're able to provide the most accurate and appropriate information and referrals. On a monthly basis, you review the resource emails and work in the database. This is with Medicaid and non-Medicaid providers.

Q: In which category do you record your time?

A: Category 2

Explanation: Although the work you are doing may seem administrative in nature, because it is specific to maintaining the resource database, it is captured in category 2. If working on entering or updating a resource that is specific to Medicaid or a Medicaid-related program (MRP), it should be recorded as category 2A, and time spent on non-Medicaid resources as category 2B.

9. Memory screen

You have a walk-in at your agency, and in meeting with the customer and a friend they brought along, they identify that there may be some concerns with memory. The customer indicates that they haven't talked to their doctor about it yet. You offer to complete a memory screen today with the customer, and they accept. You complete the memory screen, and it shows some indications that there may be a concern with memory. You offer to provide that information to their doctor, and they agree for you to do so.

Q: In which category do you record your time?

A: Category 2

Explanation: A memory screen is captured in category 2. Select category 2A if the customer currently has Medicaid, and category 2B if the customer is not currently a Medicaid recipient or you are unsure.

Additional information: A memory screen that is done as part of a LTCFS interview to assist with information needed for making a scoring determination in the Memory Loss Section would be recorded in category 3, along with the rest of your LTCFS interview time.

10. Early diagnosis activities and disease control and/or prevention

Scenario 1: A customer is talking with you about some health symptoms they are having, such as frequent urination, extreme fatigue, and increased thirst. They haven't sought medical care, and no diagnosis has been determined. Based on what you know about diabetes, you know that these symptoms could be the early signs of type II diabetes, but you also recognize that you are not able to give medical advice or diagnosis. You share that you cannot provide medical advice or diagnosis and encourage a conversation with their doctor about what they are experiencing. You also discuss the benefit of early detection and diagnosis. They indicate that they are willing to schedule an appointment with their doctor to discuss their symptoms.

Q: In which category do you record your time?

A: Category 2

Explanation: Early diagnosis activities are captured in category 2. If you know the customer is currently a Medicaid recipient, you'd select category 2A for early diagnosis activities discussion, and if the customer isn't a Medicaid recipient, or you are unsure, you'd select category 2B.

Scenario 2: This customer calls you back about a month later and indicates they met with their doctor. After a series of tests and lab work, it was determined that they are pre-diabetic. They indicated they want to do everything that they can to prevent becoming diagnosed with type II diabetes but are unsure of the resources and support available to them. You're aware of an upcoming Healthy Living with Diabetes workshop, so you share information about the program with the customer. The customer indicates an interest in pursuing this, so you gain all needed information for the registration and provide that to the staff who is facilitating the workshop.

Q: In which category do you record your time?

A: Category 2

Explanation: This contact focused on disease control and/or prevention, and dependent upon the customer's current Medicaid status, you'd select either category 2A or 2B.

11. Support group

Scenario 1: The senior center in your county had organized and facilitated a caregiver support group, but recently they've been unable to consistently provide a volunteer to facilitate it. While it will still be offered at the local senior center, the ADRC is going to take on facilitation until a new volunteer can be found. You've volunteered for this opportunity and will facilitate the support group once a month for an hour. You'll also need to plan the topics and content for each meeting and organize any guest speakers that the group will have.

Q: In which category do you record your time?

A: Category 5

Explanation: Support groups, including caregiver, family, or individual, are all captured in category 5.

Scenario 2: You utilize one of the caregiver support group meetings to provide a presentation about ADRC services. You spent an hour preparing for the support group, and then an hour presenting to the participants.

Q: In which category do you record your time?

A: Category 1

Explanation: Because you are utilizing this specific session as an opportunity to educate the caregivers about ADRC services and programs, this would be considered an outreach activity and can be captured in category 1.

12. Transportation

Scenario 1: You receive a call from a customer who needs a ride to a medical appointment. You learn from the customer that they have BadgerCare, so you tell them the non-emergency transportation provider, Veyo, is whom they'd need to contact. They talk about issues they've had in the past with utilizing Veyo and want to know about other options that are available to them. You discuss private pay options and a volunteer ride program available through a local agency and provide them with the contact information they'd need to pursue these options.

Q: In which category do you record your time?

A: Category 2A

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Explanation: Providing information about transportation services is recorded in category 2. Because medical transportation is a covered Medicaid benefit, and you know this customer has BadgerCare, you'd select category 2A.

Scenario 2: The same customer calls you back and says that they've got their ride for the appointment scheduled through Veyo. They're going to try it again because it didn't make sense to pay for another ride when they could get that one for free. Now they are also asking about a ride to the food pantry, a bingo session at the senior center, and an appointment that they have with county human services to apply for energy assistance. You discuss the same transportation options that you had previously provided. You also talk about connecting with a natural support, who may also be going to the food pantry or to the bingo session (maybe a neighbor, friend, or family member who could give them a ride). Additionally, you refer them back to county human services to see if they could provide a taxi ticket for the customer to attend the energy assistance appointment, as you know that it's something that's been offered to other customers in need of transportation.

Q: Which category do you use to document this contact?

A: Category 2A

Explanation: Providing information about transportation services is recorded in category 2. This customer is a current Medicaid recipient, so you would select category 2A.

13. Equipment

Scenario 1: You're working with a customer who has recently become disabled from a car accident. The customer's health insurance is refusing to provide adequate coverage for adaptive equipment. You discuss a referral to a benefit specialist at the ADRC for assistance with an appeal. The customer also wants to learn about options for privately purchasing the equipment now, because they heard that appeals could take a long time and needs the equipment immediately. You provide a list of durable medical equipment providers in the area that the customer could contact to find out about private pay pricing in the meantime.

Q: In which category do you record your time?

A: Category 2

Explanation: Durable medical equipment is a topic in category 2, when discussed outside the context of Medicaid or a Medicaid-related program. If the customer does have Medicaid, even if it's currently denying coverage, you would document time in category 2A. If the customer is not a current Medicaid recipient, you would document time in category 2B.

Scenario 2: You receive a call back a few months later from the customer, who did work with the benefit specialist regarding the insurance appeal and was successful in gaining coverage for that equipment. The customer is still in need of a few pieces of equipment that aren't covered by insurance, like an electronic pill dispenser. Your ADRC has a loan closet and has several items that they could benefit from. You discuss the loan equipment and fill out paperwork to fulfill their equipment needs.

Q: In which category do you record your time?

A: Category 5

Explanation: Because this equipment is specific to the loan closet, you'd document your time in category 5.

14. Medicare Part D

You assisted a customer to review their Medicare Part D plan options during a special enrollment period. At the beginning of the appointment, you confirmed basic income and asset information with the customer, to ensure that there was no potential for obtaining dual eligibility or a low-income subsidy for their Part D coverage. Through the review, the customer was able to select the plan that they wish to enroll into. You discussed next steps for enrollment, and they indicated that they would call the plan this afternoon to enroll.

Q: In which category do you record your time?

A: Category 5

Explanation: Medicare and Medicare Part D counseling, when a customer does not have dual eligibility, is captured in category 5.

Additional information: If a customer is dual-eligible, then this Medicare counseling is captured in category 1.

15. Disenrollment counseling

A customer is interested in voluntarily disenrolling from Family Care. They are a MAPP recipient, so disenrollment will not affect their ability to maintain Medicaid. You review the different services that they are currently receiving through Family Care, which include transportation to medical appointments, personal care services to assist with bathing, physical therapy, and supportive home care for cleaning one time per week. All the services could be covered by Medicaid, except for cleaning. The customer indicates that their family could come to

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do that, so they are not concerned about the loss of that paid service. You assist the customer with proceeding with a member-requested disenrollment.

Q: In which category do you record your time?

A: Category 2A

Explanation: Disenrollment counseling, when it focuses on how the customer can maintain their currently covered services upon disenrolling, is recorded in category 2. At the time of disenrollment counseling, the customer is a Medicaid recipient, so it is recorded in category 2A.