

Time and Task Scenarios for Categories 1 and 6

These scenarios are based on the Time and Task Reporting Focus Days, categories 1 and 6.

1. Appeal for full-benefit Medicaid eligibility

A customer contacts the ADRC because they were denied Medicaid Purchase Program (MAPP) eligibility and believe that they should be eligible for the benefit. You review their case in CARES, and it appears that income maintenance has incorrectly counted their spouse's income in the calculation, causing them to be ineligible. You discuss with the customer their options, which include submitting a new application, filing an appeal, or being referred to a benefit specialist for assistance. The customer requests a referral to the benefit specialist because they think they'd like to appeal but need more assistance to do so.

Q: In which category do you record your time?

A: Category 1

Explanation: Accessing CARES to determine eligibility status and providing information and referral for assistance on appeals for full-benefit Medicaid are category 1.

If you were providing hands-on assistance with the appeal for full-benefit Medicaid, that time would be captured in category 4.

2. Quality improvement

Your team discusses the recent issues with Medicaid applications with your income maintenance unit. You spend an entire hour discussing the process and how the ADRC could possibly work on a better system to get applications to income maintenance for processing. The team decides that this would be a great quality improvement (QI) project for the year.

Q: In which category do you record your time?

A: Category 1

Explanation: Because this QI discussion and subsequent project revolves around the Medicaid application process, it's recorded in category 1.

3. Looking up customers in CARES

You have several customers that completed Medicaid applications independently and submitted them to income maintenance on their own. You spend about 15 minutes going into CARES Worker Web (CWW) to review application status and case comments regarding all these customers.

Q: In which category do you record your time? How do you identify your time in category 6?

A: Category 1. For category 6, you can use initials of all customers or document “CARES.”

Explanation: You are not actively working on a Medicaid application, but you are verifying the Medicaid status so you should record your time in category 1. Within the 15-minute increment, you looked up multiple customers and/or cases. If you are not planning to record a note for that time in your client tracking system, then in category 6 it may make sense for you to document “CARES.” If you are doing additional work on all the customers you are looking up and plan to document your activities in the client tracking system, you may want to use all the initials for each customer you looked up.

4. Time and Task training

You attend a Time and Task Focus Day training presented by the Office of Resource Center Development. The training is one hour in length and focuses on categories 1 and 6.

Q: In which category do you record your time?

A: Category 8a

Explanation: Time and Task training is specific to ADRC and tribal staff to help employees do their job better, so it is recorded in category 8a. The full training time is recorded in category 8a because the training is focused on Time and Task reporting and not on the actual topics captured in the specific categories.

5. Training on Medicare

Disability Rights Wisconsin hosted its annual Medicare Open Enrollment Training for Professionals, and you attended the full-day event. The three-hour session in the morning focused on Medicare Part C and D plans, and then the three-hour session in the afternoon focused on dual-eligible customers (those who have both Medicare and Medicaid coverage), including information on special needs plans (SNP) and Low-Income Subsidy (LIS) Part D plans.

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

A: Categories 1 and 5

Explanation: Although many types of training that ADRCs and tribal ADRS and tribal benefit specialists attend are recorded in category 8a, this training is specific to Medicare. The morning three hours are recorded in category 5, as Medicare is a category 5 topic. The afternoon three hours are recorded in category 1 because Medicare for dual-eligible customers is category 1.

6. Appeal for a Medicaid-related program (MRP)

Last week, you had received a referral for a customer whose Medicare Savings Program (Specified Low-Income Beneficiary/SLMB) is terminating. After reviewing CARES for income maintenance's determination and the notice sent to the customer, you called the customer to discuss and offered options. The customer was interested in filing an appeal with your assistance, so you scheduled an appointment.

Today you met with the customer, reviewed the details, and assisted them to complete the Request for a Fair Hearing form. You made copies of supporting verifications, made the customer a copy and one for your records, and then mailed the form and verifications to the Division of Hearings and Appeals. This appointment and the time spent documenting in client tracking afterwards took you an hour and a half.

Q: In which category do you record your time?

A: Category 1

Explanation: Appeals related to any MRP are always recorded in category 1 - whether it's reviewing the case in CARES, providing information to the customer about their appeal rights, making a referral to a benefit specialist or other party who can assist with the appeal, or providing actual hands-on assistance for an MRP appeal. Time spent completing paperwork, data entry, and reporting related to activities in category 1 is also recorded in category 1.

Hands-on assistance with an MRP appeal cannot be recorded in category 4 because MRPs are not full-benefit Medicaid, and activities in category 4 are specific to obtaining or maintaining full-benefit Medicaid.

7. Minimum Data Set - Section Q (MDS-Q)

You receive an email that you have an MDS-Q referral in the system. You spend quite a bit of time gathering the information, following up with the nursing home, and documenting your

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time. You learn that the customer was discharged last week, and you will not need to do any additional follow up. All of this took about 15 minutes.

Q: In which category do you record your time?

A: Category 1

Explanation: Time spent on MDS-Q activities should be captured in category 1. In this situation you gathered information and intended to contact the customer who agreed to speak with someone about living in the community.

8. Time spent providing outreach and marketing related to Medicaid

You are asked to do a newsletter article regarding an ADRC event coming up next month. The event is a senior expo that will provide information on power of attorney documents, Medicare, ADRC resources, and Medicaid benefits.

Q: In which category(ies) do you record your time for the newsletter article? Where would you record your time for the time spent at the event?

A: Both activities should be recorded in Category 1.

Explanation: Writing an article for a newsletter is an outreach and marketing activity in this category. The event is an ADRC event, and while you may be providing information about activities that would go into another category, the entire event is outreach and marketing allowed in category 1.

9. Staff meeting with a training component

As the functional screen lead for your agency, you provide regular training to your colleagues during monthly staff meetings. This month, you discussed a customer scenario and how to capture those needs in the long-term care functional screen (LTCFS). You also utilized study guide questions provided by the DHS Screen Team for the Continuing Skills Test (CST). In total, half of the hour-long staff meeting was spent discussing and reviewing LTCFS scenarios and questions.

Q: In which category do you record your time?

A: Category 1

Explanation: Long-term care functional screen activities recorded in category 1 include discussion of a screen during staff meetings and studying for the CST.

10. Discussing home-delivered meals

You're discussing a customer's current home-delivered meals with them, and how they are currently on a donation basis. You share that the meals could also be funded with the FoodShare benefit or be part of a care plan when enrolled in a publicly funded long-term care program. The customer indicates that neither of those apply to them right now. The customer indicates that they would like to increase meals from three days to five days per week, and you let the customer know that you'll transfer them to the nutrition program coordinator to request that as soon as you finish the rest of your conversation about other services they'd like to discuss. You continue to talk to the customer about transportation needs that they have and provide several resources.

Q: Where do you record your time spent discussing these topics?

A: Category 2

Explanation: Because the discussion of these topics (home-delivered meals and transportation) was outside of the context of Medicaid or an MRP, it is captured in category 2. The customer specifically stated that long-term care programs and FoodShare didn't apply, but if the customer had indicated that they wanted to learn more about services covered in long-term care programs, then these topics would have been recorded in category 1, as discussion about the services would have been within the context of an MRP.

11. Resource database

You have been assigned the task of updating your ADRC's resource database. This afternoon, you spent two hours working on contacting agencies listed in the resource database. About 75% of the agencies that you contacted accept Medicaid as a payment source. The other 25% of the agencies do not accept Medicaid as a payment source.

Q: In which category(ies) do you report your time? What do you record in category 6?

A: Category **2A** for 1.5 hours and category **2B** for .5 hour. In category 6 you can report the client ID as R. Database or something similar, as long as it is more than two initials.

Explanation: Medicaid services can be reported in Category 2A. The services that do not accept Medicaid as a payment source must be reported in 2B.

12. Non-MDS-Q

You have been contacted by a nursing home about a resident who is currently in one of their swing beds for rehabilitation. The customer is ready for discharge and has expressed interest in enrolling into a long-term care program for additional help when they go home.

Q: In which category do you record your time?

A: Category 1

Explanation: While this referral did not come to the ADRC through the MDS-Q referral system, it remains a referral to discuss publicly funded community service options.

13. Disenrollment counseling

You are meeting with a customer who is currently enrolled in Family Care, and the customer indicates that they no longer want to be enrolled. You discuss their current living situation, current services and supports, their current Medicare and Medicaid benefits, and how disenrollment affects these services and benefits. You discuss how the customer can maintain Medicaid-covered services after disenrolling and other resources the customer can access. The customer indicates that they'd like to proceed, and you assist the customer to complete a Member Requested Disenrollment.

Q: In which category do you record this time?

A: Category 2

Explanation: Disenrollment counseling is recorded in category 2, as you are assisting the customer to look at their options for maintaining their services or meeting their needs outside of a publicly funded long term care program. If the conversation was about an involuntary disenrollment and the customer wants to maintain their long-term care program, then your time would be recorded in category 1.

14. Training in learning management system (LMS)

Your afternoon appointment with a customer is cancelled, so you have some "free" time available and decide to work on one of your annual performance goals, which is to complete Motivational Interviewing in the learning management system (LMS).

Q: In which category do you record your time?

A: Category 8a

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Explanation: This is an ORCD-offered training that is specific to ADRC and tribal staff to help you do your job better. However, it's not tied to a specific topic that falls into a different category (like training specific to Medicaid or MRP, or the LTCFS, which would be category 1), so your time spent in this type of training is recorded in category 8a.

15. Creating an advertisement

Your ADRC assigned you the task of creating an advertisement in the local newspaper for an ADRC event that will showcase all of the work your ADRC encompasses. Your work includes developing a marketing flyer, contacting the newspaper, faxing the information, and ensuring payment to the newspaper for this advertisement.

Q: In which category(ies) would you record your time? What do you record in category 6?

A: Category 1, and category 6 can state "M & O" or something similar.

Explanation: When you are developing content and distributing the information about the ADRC and its services and programs, all of your time can be captured in category 1.

16. Subsequent contact for an MDS-Q referral

Last week you made initial contact with a customer after an MDS-Q referral. At that time, you learned that the customer is interested in publicly funded long-term care. You set up another meeting and met with the customer to do the LTCFS, which takes an hour. You also spent another 30 minutes reviewing all the long-term care programs and provider options.

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

A: Category 3 for the LTCFS time and category 1 for time spent discussing enrollment options.

Explanation: This referral started out as an MDS-Q contact, which is category 1; however, the subsequent contacts are recorded in the category in which you spent your time. Time spent administering and calculating the LTCFS is recorded in category 3. All of your time spent discussing enrollment options for publicly funded long-term care is recorded in category 1.

17. Resource materials

Scenario 1: Your ADRC is running low on the long-term care program folders that ADRC specialists take to home visits. You spend two hours making copies of the "Tell Me More..." documents, LTCFS, Elderly Blind and Disabled Medicaid applications, and other Department of

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Health Services approved documents for options and enrollment counseling. You put together 50 folders for ADRC specialists to use.

Q: In which category do you record your time?

A: In category **8a**, as this is general administration.

Scenario 2: On a monthly basis, you are assigned with ensuring that the ADRC's resource room is stocked with copies of documents, forms, and applications that the ADRC staff use to mail out resources to customers or prepare for customer appointments. This month, there were lots of documents that only had a copy or two left in the filing cabinet, so you spent an hour making copies and restocking the folders so that everything is available for the staff to grab and go.

Q: In which category do you record your time?

A: In category **8a**, as this is general administration.

Explanation: In both of these scenarios, you are not working on customer-specific materials (gathering documents or forms to take to an appointment with a customer), as you are putting documents and folders together that could be used by any staff to help them do their job better.