

Time and Task Scenarios for Categories 3 and 4

These scenarios are based on the Time and Task Reporting Focus Days, categories 3 and 4.

1. Application for Medicaid

During your appointment today, you assisted your customer with filling out their Elderly, Blind, or Disabled (EBD) Medicaid application, including making copies of their identification, lease, bank statements, and outstanding medical bills. After the appointment, you scan a copy for your records, submit the application and verifications to income maintenance (IM), and complete your client tracking.

Q: In which category do you record your time?

A: Category 4

Explanation: Your prep time for this appointment, time spent in this appointment assisting a customer to complete their application for full benefit Medicaid, and time after the appointment to complete paperwork, data entry, and reporting are all documented in category 4.

2. Options counseling visit

You conduct a home visit with a customer who needs long-term care services to remain in their home due to some chronic medical issues. You discover that they have limited assets and are unable to pay for these services privately so would need to apply for Medicaid. You complete options counseling, including talking about Community Waiver Medicaid, and you conduct the long-term care functional screen (LTCFS) per their request. You also have the customer sign a release of information to obtain their medical records from their primary physician. 45 minutes of the visit was spent discussing options, including Medicaid programs, and 30 minutes of the visit was spent conducting the LTCFS.

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

A: Categories 1 and 3

Explanation: The time spent providing options counseling and discussing publicly funded long-term care programs is documented in category 1. The time spent administering the LTCFS and obtaining signatures is documented in category 3.

3. Appeal for Supplemental Security Income (SSI)

You assisted a customer with starting their SSI Request for Reconsideration appeal last week, but they didn't have all the needed information. Today they've come back to complete their Disability Report—Appeal form. You assist the customer with completing the form and then submit it to the Social Security Administration.

Q: In which category do you record your time?

A: Category 4

Explanation: Assisting a customer with completing their SSI appeal and any documents and forms needed to assist their appeal process is documented in category 4. SSI eligibility provides an income benefit and entitlement to full benefit Medicaid.

4. Application for Medicare Savings Program (MSP)

You meet with a customer to assist with their application for Specified Low-Income Medicare Beneficiary (SLMB), which is an MSP. The customer prefers to do a paper application, so you assist the customer with completing the EBD Medicaid application and make copies of the verifications they provided. After the appointment, you scan a copy of the application and verifications for your records and submit this to IM. Then you complete your client tracking for this contact.

Q: In which category do you record your time?

A: Category 1

Explanation: Applications and appeals for MSPs are documented in category 1, because MSPs are not full benefit Medicaid. Although the paper application for MSP is actually the same paper application for EBD Medicaid, the intent of completing that application in this scenario is only related to obtaining MSP, not a concurrent application for MSP and EBD Medicaid.

5. LTCFS case consult

As part of completing the LTCFS for a customer, you submit the medical record request to the primary physician. After two weeks, you follow up on the medical records status because you have not heard back during the requested time. Once you receive medical records back, there is an unknown diagnosis included that is contributing to their medical needs. You consult with the DHS Long-Term Care Functional Screen Team to determine where to capture the diagnosis on

the diagnosis cue sheet. You then complete the LTCFS after the case consult regarding the diagnosis.

Q: In which category would you record your time?

A: Category 1 and 3

Explanation: Consult on the diagnoses for a functional screen, including consult with the DHS LTCFS Screen Team, is documented in category 1 as LTCFS activities. Data gathering for the purpose of the LTCFS, including reaching out to collateral contacts and follow-up on medical records should be documented in category 3.

6. Tracking in Client Assistance for Re-employment and Economic Support System (CARES)

Scenario 1: You assisted a customer with submitting their EBD Medicaid application two weeks ago, and they call and say they've received a letter from the consortium that they don't understand. You access their case in CARES and review the case comments and correspondence. The letter they received indicates that they need to provide their bank statement from last month. You explain this to the customer, and they indicate that they can bring it in to you tomorrow afternoon to submit to IM for them.

Q: In which category do you record your time?

A: Category 4

Explanation: Because you are actively assisting the customer with gaining full benefit Medicaid eligibility, when you utilize CARES to determine the status of their application and discuss what additional verification is needed with the customer, this time is documented in category 4.

Scenario 2: You determined functional eligibility for a customer and referred them to apply for EBD Medicaid through the consortium. It's been about three weeks since that referral was made, so you access CARES to see if they've submitted the application or where it is in process. You can see that they submitted about two weeks ago, it was processed last week, and is pending verification of their pension. The customer has not contacted you to request any assistance regarding the letter they received from the consortium, so you assume that they will submit the verification by the due date. You document your review of their case in client tracking, but you do not follow up with the customer to discuss or offer assistance.

Q: In which category do you record your time?

A: Category 1

Applies to:
ADRC
Tribal ADRS
Tribal Benefit Specialist

P-02009-22-03
(05/2022)

Explanation: In this scenario, you use CARES to verify the customer's application status and Medicaid eligibility, but you are not providing any follow-up and assistance to the customer with their application process. This time would be documented in category 1.

7. Time reporting the next day

You meet with a customer for a home visit and complete the LTCFS interview. You end your day there, so you do not report your time in client tracking that day. When you're back in the office the next day you enter your notes into client tracking and record your time spent in the workbook for both days.

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

A: Category 3

Explanation: You would document in category 3 for the time spent with the customer on the date of the home visit as well as the time spent the next day when documenting in client tracking (if it takes the majority of a 15-minute increment).

Because documentation occurred in category 3 for the work done with the customer, there is also a requirement to document in Category 6 for these contacts. This documentation should be the customer's initials on the date you met with them. When documenting notes in client tracking for the next day, Category 6 should indicate Client Tracking, Wellsky, case notes, or something similar to note that it was a follow-up from a customer interaction.

8. Collateral contacts

Last week you met with a customer and their daughter to complete the LTCFS interview, but they were unable to answer some specifics related to the customer's personal care needs. Today, you call the assisted living facility, and you have an opportunity to talk to the staff, who provide information needed for the LTCFS. The staff also emails you the customer's face sheet and care plan.

Q: In which category do you record your time?

A: Category 3

Explanation: Gathering information from collateral contacts or medical professionals in order to complete the LTCFS is documented in category 3.

9. Medicaid Assistance Purchase Plan (MAPP) Review

This afternoon you met with a customer to complete their annual MAPP review. You reviewed the renewal form sent to them by income maintenance and assisted them with making a few updates on the form. You also discussed the verifications that they will need to provide, which include their paystubs for the past 30 days and their most recent bank statement. They indicated that they have all of that at home and can bring those to you on Thursday afternoon because they aren't scheduled to work. After the appointment, you submitted the signed renewal form to IM.

Q: In which category do you record your time?

A: Category 4

Explanation: Assisting a customer with their Medicaid review is documented in category 4 as Medicaid eligibility maintenance.

10. LTCFS and memory screen

You meet with a customer to complete a LTCFS. During the screen, the customer indicates they are having trouble remembering appointments and where they put things. They do not have a formal diagnosis of memory loss. You discuss a memory screen, and they agree to it. You complete the memory screen during this time, and they do not pass either the animal naming or the word recall sections of the screen. 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 3

Explanation: 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.

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11. Studying for the Continuing Skill Test (CST)

The CST for LTCFS screener certification is scheduled for next month, and you attend a staff meeting led by your agency's screen liaison. During this meeting, you and your colleagues study materials provided by the DHS Long-Term Care Functional Screen Team to prepare for the testing.

Q: In which category do you record your time?

A: Category 1

Explanation: LTCFS activities, including studying for and taking the CST, are documented in category 1.