



Policy Name	SSIS Activity Log
Policy Number	1.405
Origination Date	7/1/2019
Board Approval Date	7/16/2019
Policy Owner	Fiscal Supervisor
Responsible Personnel	All staff members of the Social Services Unit
Regulatory Requirement	
Cross References	
Attachments	

Appendix Purpose

To outline required SSIS Activity Log procedures to be used by staff

Procedure

1. SSIS activity logs and corresponding case notes are to be completed **by Friday at 4:30 p.m. for the preceding work week.** Daily reporting is encouraged, but not required. Supervisors will assure time reporting compliance.
2. If an employee encounters unusual circumstances (ex: a significant spike in case load size, covering another worker's cases during a leave, an unexpected leave) which make it difficult to fulfill this requirement, the employee should discuss the situation with the Supervisor and together they will determine how to proceed.

Why is Activity Log so important?

Activity Log is the basis of client billing for Targeted Case Management and Waiver Case Management. If activity logs are not completed in an accurate and timely fashion, those case management hours and/or hits will be **lost revenue** to the agency.

- Staff Activity Reporting and Case notes are the basis for many **agency responsibility and liability issues**. Reasonable efforts, compliance with rule/statute, and completion of mandated timelines are all documented through accurate and up to date staff activity entry and case notes.
- When staff activity and case notes are not completed in a timely fashion, it makes it difficult for **co-workers providing coverage** to determine the best course of action should an emergency situation arise and the primary worker is not available to handle the situation.

REPORTING EXPECTATIONS:

It is expected that employees will document 75% of work time as program/case related. For example:

- For someone who works a 40-hour work week, it is expected that 30 hours will be recorded as client related.
- For someone who uses accrued time for a day: the available time would be 40 hours minus the 8 hours of accrued time off. 75% of available time (32 hours) would be 24 hours that would be reported as client related.
- For someone who has a unit meeting lasting 2 hours and an all staff meeting lasting 2 hours during the same week, 75% of available time (36 hours) would be 27 hours that would be reported as client related time.

REPORTING PROCEDURES:

When entering staff activity and case notes, employees should:

- include basic information such as who, what, when and where
- Enter clearly in your staff activity reporting and case note, your plan specific qualifying information.
- List the goal(s) and objective(s) you worked on from the client's case plan.
- Describe your interaction and the client's ability and willingness to participate and relate your activity to the goal
- Complete the Purpose Line with key words that will help you find the case note in the future.

For Mental Health Targeted Case Management Claims:

- Be sure to use the required language including the following key words in both the body of your case note and the purpose line in SSIS Staff Activity Reporting: **Assess, Monitor, Refer, Coordinate, Evaluate, Advocate.**

For Waiver Case Management Claims:

- **May Contain the Following Activities in the Purpose Line of your Staff Activity Entry:**
 - Annual Review of service plans
 - Assisting to identify providers
 - Assisting in accessing services
 - Coordination of service
 - Development of service plan
 - Evaluation & Monitoring of the services identified in the plan.

Our Policy Goal:

Your time is valuable. Please help us claim the revenues you have earned to help serve our clients and provide the necessary resources staff need to perform their work.

Signatures:

Catherine Lee

Catherine Lee, Director

7/16/19

Date

Board Approval:

Gary Hendrickx
Gary Hendrickx, Board Chair

7/16/19

Date