



SECONDARY DOCUMENTATION

The Time Study Buddy™ has integrated Secondary Documentation into its regular time survey process.

Secondary Documentation is required for Claiming Units with over 100 workers who are using one of the 5/10/20 workday periods per quarter instead of doing perpetual time surveys. It requires up to 2 “who-what-where” explanations for each federally funded activity code.

In the examples that follow we use a 10 workday time survey.

		Mon (11/5/2012)														
Enter Payroll Information	4	5	6	7	8	9	10	11	12	13	14	15	16	17	Total	
Total Hours	-	8.00	8.00	8.00	8.00	8.00	-	-	8.00	8.00	8.00	8.00	8.00	-	80.00	

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SECONDARY DOCUMENTATION FOR WORKERS

In the example to the right, 2.00 hours were recorded on the active day to 4 activity codes. Note that Code 04 has a **green** happy face indicating it is federally funded.



		Mon (11/5/2012)			
Enter Payroll Information		4	5	6	7
Total Hours	:	8.00	8.00	8.00	8.00
Enter Activity Usage		used: 8.00 of 8.00			
01	Other Programs/Activities	2.00			
03	Outreach to Non Medi-Cal Programs	2.00			
04	Medi-Cal Outreach	2.00			
05	Referral, Coordination, and Monitoring of Non Medi-Cal Services	2.00			
06	Referral, Coordination, and Monitoring of Medi-Cal Services				
11	Contract Administration for Non Medi-Cal Services				
12	Contract Administration (A) for Medi-Cal Services Specific for Medi-Cal Populations				
13	Contract Administration (B) for Medi-Cal Services Specific for Medi-Cal and Non Medi-Cal Populations				
21	General Administration				
22	Paid Time Off				
(+ Add Activity Code)					
		EDIT	EDIT	DONE	

After clicking the DONE button for that day, a screen pops up indicating that Secondary Documentation may be required.

Secondary Documentation

Some of the codes used on Monday, Nov 5 require secondary documentation

Code	Hours	Documentation
04	2.00	Needed

[Add](#)

[Close](#)

Click the ADD button to add documentation. Alternately you can click CLOSE to add documentation later.

After clicking ADD, enter a “who-what-where” explanation. Then click SAVE.

Add Secondary Documentation

Code: 04 - Medi-Cal Outreach

Date: Monday, Nov 5

Hours: 2.00

Describe what you did, who for, and where this service was performed.

Worked at the downtown clinic and answered questions about Medi-Cal eligibility for those who appeared to be potentially eligible.

[Save](#)



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Note that a **green** triangle has been placed in the cell containing the explanation on the time survey.

Enter Activity Usage			
☹️ 01	Other Programs/Activities	:	2.00
☹️ 03	Outreach to Non Medi-Cal Programs	:	2.00
😊 04	Medi-Cal Outreach	:	2.00
☹️ 05	Referral, Coordination, and Monitoring of Non Medi-Cal Services	:	2.00

In this example, on the active day 1.00 hour was recorded to 8 different codes.

Enter Activity Usage				used: 8.00 of 8.00			
☹️ 01	Other Programs/Activities	:	2.00	2.00	➡ 1.00	:	:
☹️ 03	Outreach to Non Medi-Cal Programs	:	2.00	2.00	➡ 1.00	:	:
😊 04	Medi-Cal Outreach	:	2.00	2.00	➡ 1.00	:	:
☹️ 05	Referral, Coordination, and Monitoring of Non Medi-Cal Services	:	2.00	2.00	➡ 1.00	:	:
😊 06	Referral, Coordination, and Monitoring of Medi-Cal Services	:	:	:	➡ 1.00	:	:
😊 11	Contract Administration for Non Medi-Cal Services	:	:	:	➡ 1.00	:	:
😊 12	Contract Administration (A) for Medi-Cal Services Specific for Medi-Cal Populations	:	:	:	➡ 1.00	:	:
😊 13	Contract Administration (B) for Medi-Cal Services Specific for Medi-Cal and Non Medi-Cal Populations	:	:	:	➡	:	:
☹️ 21	General Administration	:	:	:	➡ 1.00	:	:
☹️ 22	Paid Time Off	:	:	:	➡	:	:

(+) Add Activity Code

EDIT REDO EDIT REDO EDIT REDO **DONE**

After clicking DONE for the day, Code 06 and 12 now appear in the popup. Code 04 already had two instances of documentation and now meets the requirement, so it is no longer displayed in the popup.

Secondary Documentation			
Some of the codes used on Wednesday, Nov 7 require secondary documentation			
Code	Hours	Documentation	
😊 06	1.00	Needed	Add
😊 12	1.00	Needed	Add

Close

It is not required to enter an explanation before advancing to the next time survey day. You can CLOSE without adding.



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In this example the remaining days have been completed and we're viewing the entire time survey. Note that a **red** triangle appears in the cells where explanations were required, but bypassed.

Enter Activity Usage														
☹️ 01	Other Programs/Activities	-	2.00	2.00	1.00	1.00	1.00	-	-	-	-	-	-	7.00
☹️ 03	Outreach to Non Medi-Cal Programs	-	2.00	2.00	1.00	1.00	1.00	-	-	-	-	-	-	7.00
😊 04	Medi-Cal Outreach	-	2.00	2.00	1.00	1.00	1.00	-	-	-	-	-	-	7.00
☹️ 05	Referral, Coordination, and Monitoring of Non Medi-Cal Services	-	2.00	2.00	1.00	1.00	1.00	-	-	-	-	-	-	7.00
😊 06	Referral, Coordination, and Monitoring of Medi-Cal Services	-	-	-	1.00	1.00	1.00	-	-	-	-	-	-	3.00
☹️ 11	Contract Administration for Non Medi-Cal Services	-	-	-	1.00	1.00	1.00	-	-	-	-	-	-	3.00
😊 12	Contract Administration (A) for Medi-Cal Services Specific for Medi-Cal Populations	-	-	-	1.00	1.00	1.00	-	-	-	-	-	-	3.00
😊 13	Contract Administration (B) for Medi-Cal Services Specific for Medi-Cal and Non Medi-Cal Populations	-	-	-	-	-	-	-	-	-	-	-	-	0.00
☹️ 21	General Administration	-	-	-	1.00	1.00	1.00	-	-	-	-	-	-	3.00
☹️ 22	Paid Time Off	-	-	-	-	-	-	-	-	8.00	8.00	8.00	8.00	40.00
(+ Add Activity Code)		EDIT	REDO											

To ADD an explanation click on the **red** triangle and enter your explanation, then SAVE. To view or edit an existing explanation click on the **green** triangle.



When the time survey is ready for electronic signature, an automatic reconciliation process will determine if the Secondary Documentation requirement has been met.

If not, you will see a popup containing all of the entries for which an explanation was bypassed.

Note: A time survey cannot be printed or signed until the Secondary Documentation requirement has been met.

Secondary Documentation				
Some of the codes you have used require secondary documentation				
Code	Date	Hours	Documentation	
😊 06	Wednesday, Nov 7	1.00	Needed	Add
😊 06	Thursday, Nov 8	1.00	Needed	Add
😊 06	Friday, Nov 9	1.00	Needed	Add
😊 12	Wednesday, Nov 7	1.00	Needed	Add
😊 12	Thursday, Nov 8	1.00	Needed	Add
😊 12	Friday, Nov 9	1.00	Needed	Add
Close				



SECONDARY DOCUMENTATION FOR ADMINISTRATORS

The default instruction appears above the explanation box:

“Describe what you did, who for, and where this service was performed.”

Add Secondary Documentation

Code 04 - Medi-Cal Outreach

Date Tuesday, Nov 6

Hours 2.00

Describe what you did, who for, and where this service was performed.

Worked at the downtown clinic and answered questions about Medi-Cal eligibility for those who appeared to be potentially eligible.

Save

The instruction can be changed for each activity code.

To do so, click on the Activity Code and then on MANAGE.

Note: If you have multiple Claiming Units you will need to do this for each one.

06 - Referral, Coordination, and Monitoring of Medi-Cal Services

Manage

Referral, Coordination, and Monitoring of Medi-Cal Services includes making referrals for coordinating, and/or monitoring the delivery of Medi-Cal covered services.

Examples:

- A Public Health Nurse making a client referral to a local public, mental health provider.
- Identifying and referring adolescents who may be in need of Medi-Cal family planning services.
- Making referrals and/or coordinating medical or physical examinations for necessary medical/dental/mental health evaluations.
- Providing follow up contact to ensure that a child has received the prescribed medical/dental/mental health services covered by Medi-Cal.
- Gathering any information that may be required in advance of these referrals.

Close

Type over the default instruction and click SAVE.

Please note that Secondary Documentation is only available for federally funded activity codes.

Manage Code 06 - Referral, Coordination, and Monitoring of Medi-Cal Services

Comments

Secondary Doc Usage Describe what you did, who for, and where this service v

Indicator good (default)
 impartial
 bad

Inactive no ▾

Cancel **Save**