



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)	/5/201	2)											
Enter Payroll Information	4	5	6	7	8	9	10	11	12	13	14	15	16	17	Total
Total Hours	2	➡ 8.00	<u>8.00</u>	<u>8.00</u>	<u>8.00</u>	<u>8.00</u>	=	- 2	<u>8.00</u>	<u>8.00</u>	<u>8.00</u>	<u>8.00</u>	<u>8.00</u>	2	80.00

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SECONDARY DOCUMENTATION FOR WORKERS

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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	/5/201	2)
Enter	Payroll Information	4	5	6	7
Total H	lours	2	➡ 8.00	<u>8.00</u>	<u>8.00</u>
Enter	Activity Usage	used: 8.	00 of 8	.00	
🙄 <u>01</u>	Other Programs/Activities	2	➡ 2.00	2	2
🙂 <u>03</u>	Outreach to Non Medi-Cal Programs	- 2	➡ 2.00	- 2	2
<u> 04</u>	Medi-Cal Outreach	- 2	➡ 2.00	2	5
🙂 <u>05</u>	Referral, Coordination, and Monitoring of Non Medi-Cal Services	-	➡ 2.00		-
<u> 06</u>	Referral, Coordination, and Monitoring of Medi-Cal Services	- 2	•	2	2
😁 <u>11</u>	Contract Administration for Non Medi-Cal Services		•	- 2	:
<u>) 12</u>	Contract Administration (A) for Medi-Cal Services Specific for Medi-Cal Populations	-	•	-	=
😊 <u>13</u>	Contract Administration (B) for Medi-Cal Services Specific for Medi-Cal and Non Medi-Cal Populations	-	•	:	=
😁 <u>21</u>	General Administration	2	-	2	2
🙂 <u>22</u>	Paid Time Off		•	:	=
(+) Add	Activity Code	E D L D O	DONE		

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

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

After clicking ADD, enter a "who-whatwhere" explanation. Then click SAVE.

Secon Some of th	e codes used o	cumentation n Monday, Nov 5 require secondary documentation
Code	Hours	Documentation
😂 <u>04</u>	2.00	Needed Add
		Close





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2.00

2.00

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2

2

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

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

Enter	Activity Usage				us	ed: 8.0	00 of 8	.00	
🙂 <u>01</u>	Other Programs/Activities	:	2.00	2.00		1.00	2	-	
🙂 <u>03</u>	Outreach to Non Medi-Cal Programs	- 2	2.00	2.00		1.00	2	÷	
<u> 04</u>	Medi-Cal Outreach	2	2.00	2.00		1.00	2	z.	
🙂 <u>05</u>	Referral, Coordination, and Monitoring of Non Medi-Cal Services		2.00	2.00		1.00	2	z.	
<u>) 06</u>	Referral, Coordination, and Monitoring of Medi-Cal Services	2	÷	÷		1.00	2	z	
🙂 <u>11</u>	Contract Administration for Non Medi-Cal Services		=	=	•	1.00	2	z	
🙄 <u>12</u>	Contract Administration (A) for Medi-Cal Services Specific for Medi-Cal Populations	=	:	:	*	1.00	-	2	
😊 <u>13</u>	Contract Administration (B) for Medi-Cal Services Specific for Medi-Cal and Non Medi-Cal Populations	÷	:	:	•		÷	÷	
🙂 <u>21</u>	General Administration	-	2	2		1.00	1	z.	
😁 <u>22</u>	Paid Time Off	2	=	2			2	z	
<u>(+) Add /</u>	Activity Code					D O N E			

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.

It is not required to enter an explanation before advancing



Enter Activity Usage

04 Medi-Cal Outreach

Non Medi-Cal Services

05

2 Other Programs/Activities

03 Outreach to Non Medi-Cal Programs

Referral, Coordination, and Monitoring of



to the next time survey day. You can CLOSE without adding.



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															
🙂 <u>01</u>	Other Programs/Activities	2	<u>2.00</u>	<u>2.00</u>	<u>1.00</u>	<u>1.00</u>	<u>1.00</u>	2	2	2	2	2	2	2	2	7.00
😁 <u>03</u>	Outreach to Non Medi-Cal Programs	-	2.00	2.00	<u>1.00</u>	<u>1.00</u>	<u>1.00</u>	2	2	2		2	=	5	-	7.00
<u> 04</u>	Medi-Cal Outreach	2	2.00	2.00	<u>1.00</u>	1.00	<u>1.00</u>	2	2	2	2	2	2	2	2	7.00
🙄 <u>05</u>	Referral, Coordination, and Monitoring of Non Medi-Cal Services	:	2.00	<u>2.00</u>	1.00	1.00	<u>1 00</u>	2	=	-	-	-	-	-	-	7.00
😊 <u>06</u>	Referral, Coordination, and Monitoring of Medi-Cal Services	=	2		<u>1.00</u>	<u>1.00</u>	<u>1.00</u>	1	=	=	=	2	=	=	2	3.00
🙄 <u>11</u>	Contract Administration for Non Medi-Cal Services	:	=		<u>1.00</u>	<u>1.00</u>	<u>1.00</u>	:	=	-	-	-	-	-	-	3.00
<u>) 12</u>	Contract Administration (A) for Medi-Cal Services Specific for Medi-Cal Populations	=	÷	-	<u>1.00</u>	<u>1.00</u>	<u>1.00</u>	-	=	=	=	÷	=	÷	:	3.00
😊 <u>13</u>	Contract Administration (B) for Medi-Cal Services Specific for Medi-Cal and Non Medi-Cal Populations	÷	÷	:	-	÷	-	5	=	:	:	:	:	=	:	0.00
🙄 <u>21</u>	General Administration	2	2	2	<u>1.00</u>	<u>1.00</u>	<u>1.00</u>	2	2	2	2	2	2	2	2	3.00
🙂 <u>22</u>	Paid Time Off	:	2	5	2	-	:	2	5	8.00	<u>8.00</u>	<u>8.00</u>	8.00	8.00	=	40.00
<u>(+) Add</u>	Activity Code	E REDO						E R D D T								

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.

Sec Some of	ondary Docu	umen used requ	tation
Code	Date	Hours	Documentation
🙄 <u>06</u>	Wednesday, Nov 7	1.00	Needed Add
😂 <u>06</u>	Thursday, Nov 8	1.00	Needed Add
😂 <u>06</u>	Friday, Nov 9	1.00	Needed Add
😂 <u>12</u>	Wednesday, Nov 7	1.00	Needed Add
<u>) 12</u>	Thursday, Nov 8	1.00	Needed Add
<u>) 12</u>	Friday, Nov 9	1.00	Needed Add
		Close	



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			IDARY DOCUMENTATION			_
		ACTIVITY				
ACTIVITY	OCUMENTATION	CODE	DOCUMENTATION			
CODE DOCUMENT M Worked at th	TATION he downtown clinic and answered questions about Medi-Cai eligibility for those who appe and with the second data and an appendix and an appendix of the second data and the	ared to be po	Worked at the downtown clinic and answered aug	stions	HOURS 2	DATE 11/6/2012
36 Visited patie 34 Worked at th 36 Visited patie	Ints at the county hospital who were not covered by private insurance, and handled out or he downtown clinic and answered questions about Medi-Cal eligibility for those who appe- ters at the creative benefital who were and covered by onlyate insurance, and handled out be	sared to be po	Worked at the downtown clinic and answered que	suons		11/9/2012
12 Monitored th	his arme obarry hospital who were not obvered by private insurance; and nanced out of the women's outpatient clinic for administrative compliance. No problems noted as vaccingtion outpatient clinic for administrative compliance. No problems noted	06	Visited patients at the county hospital who were n	ot cove	1	11/7/2012
		04	Worked at the downtown clinic and answered que	stions		
		06	Visited patients at the county hospital who were n	ot cove		
		12	Monitored the women's outpatient clinic for admin	istrativ	_	
		12	Monitored the vaccination outpatient clinic for adm	ninistra		
_					_	
				HOURS	C	DATE
				·	2	11/6/2012
					1	11/9/2012
					2	11/5/2012
				: 	4	11/0/2012
				I	+	11/0/2012
					1	11/7/2012
				·	1	11/9/2012
					_	
	1					
EMPLOYEE: I certify that and the active	this is a true and accurate report of my time				_	
arris s/10 aCtry						
		EMPLOYEE:	I certify that this is a true and accurate report	rt of my t	ime	
Electronical	y signed by Thomas Gunselman on 12/13/2012					
Electronical Employee's Sig	ly signed by Thomas Gunselman on 12/13/2012 pubure (BLUE INK ONLY)		and the activities were performed as show	1.		

Secondary documentation prints out as a second page to the time survey and is electronically signed at the same time.

PLOYEE:	I certify that this is a true and accurate report of my time
	and the activities were performed as shown.
	Electronically signed by Thomas Gunselman on 12/13/2012



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SECONDARY DOCUMENTATION FOR ADMINISTRATORS

The default instruction appears above the explanation box:

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

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.

Type over the default instruction and click SAVE.

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

Add	Secondary Documentation							
Code	😂 04 - Medi-Cal Outreach							
Date	Tuesday, Nov 6							
Hours	2.00							
Describ	e what you did, who for, and where this service was performed.							
Worked a who appe	Worked at the downtown clinic and answered questions about Medi-Cal eligibility for those who appeared to be potentially eligible.							
	Save							

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

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

Close

- 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.

