COMMUNITY SERVICES

Work Measurement Study for the Period
June 2009 – November 2009

Medically Dependent Children Program
(MDCP) Case Managers

FINAL REPORT 2010

Prepared by:

Performance & Workload Measurement Unit
Budget & Data Management Section
Chief Financial Officer Division
ACKNOWLEDGMENTS

The Performance and Workload Measurement Unit (PWM) staff of the Texas Department of Aging and Disability Services (DADS) conducted this Community Services 2009 work measurement study on the Medically Dependent Children Program (MDCP).

The following PWM staff collected, corrected, analyzed data, and prepared the ensuing report:

- Jan Amazeen, Unit Manager
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- Brad Wood, Senior Analyst

Carol Sloan, Maria Duncan, Sandy Gregory, Jim Essler, the Regional Directors of the Community Services program and Program Budget staff guided the design and implementation of the study.

Linda Moeckly of DADS Claims Management Division provided technical assistance to retrieve program area product count information.

Ricky Wilkins of DADS IT assisted in the automated delivery of study software via distribution through the Novell system.

Leanor Johnston, Human Resources Specialist for HHSC, provided time and leave data.

A special “thank you” to all of the Community Services MDCP Case Managers who participated in the study for their professionalism, patience, and persistence in completing the study.

Each participant is a credit to the Community Services program.

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INTRODUCTION
Background

With the approval of DADS Assistant Commissioner for Access & Intake, Gary Jessee, and DADS Chief Financial Officer, Gordon Taylor, this work measurement study (WMS) of Community Services case managers was conducted by the Performance and Workload Measurement (PWM) unit.

The study provides valid and reliable standard time calculations for the completion of specific case manager products and the percentages of time case managers spend on case-related activities.

Additionally, the study results provide program managers and regional directors with data for evaluating the impact of program and policy changes while providing budget staff additional data for use in the development of the Legislative Appropriations Request (LAR), and the determination of equitable distribution of agency resources.

Study Design

Methodology

To develop standard times and percentages of time with a high degree of statistical reliability, PWM employed a simple random sampling methodology to conduct a Random Moment Time Study (RMTS) using Personal Digital Assistants (PDA’s) for data collection.

A RMTS is a federally recognized statistical sampling technique where participants record work activities from pre-defined selections at random moments during the study period.

Sampling occurred in two stages:

1) random start dates were assigned to each participant to begin collecting data, and,
2) random time samples emitted by the PDA’s were collected by participants.

Participation

The six month study period began June 3, 2009 and ended November 30, 2009.

All 44 full time equivalent (FTE) MDCP Case Manager positions were included in the study with 100% completing the study.

Case Managers participated in the study until collecting a minimum of 100 time samples.

The collection of time samples for each participant allowed for statewide validity of study results.\(^1\) The average number of work hours needed to achieve completion was 52.3 hours (Appendix A).

\(^1\) Statewide validity means that study results are valid at a statewide level but cannot be extrapolated down to a regional level.
Data Collection

Participants were provided a PDA pre-loaded with study software to serve as a self-contained data collection instrument for study information. PWM analysts assisted participants in loading and installing study software on their workstations.

PWM analysts conducted one-on-one telephone training with participants explaining the purpose of the study, and the use of the PDA for collecting, entering, and submitting collected study data. Basic identification and work information for each participant was confirmed during the training session. Participants completed a PowerPoint orientation on the use of the PDA as a data collection instrument prior to the start of study telephone training (Appendix B).

The PDA study instrument used a menu-driven decision tree, with each selection determining the next level of choices. When the device signaled, participants recorded the corresponding activity they were performing at that moment (Appendix C). The PDA emitted random signals (time samples) at an average of 2.4 times per hour. Lunch, leave, and travel times were entered using special manual procedures.

Participants collected time samples whenever working, including work occurring outside normal assigned hours. At least twice per week participants were required to submit collected data via the PDA “hot-sync” process to electronically transmit data to the PWM server (Appendix D).

Selections were entered into the PDA via a three-step entry process based upon the code definitions (Appendix C). Completing an entry took approximately 10 seconds.

Figure 1 provides a flow chart of the entry process.

Figure 1: Study Instrument Decision Tree
With each random time sample received, participants made their three step data entry from the pre-defined selection menu shown in Table 1.

Table 1: Study Selection Menu

<table>
<thead>
<tr>
<th>CASE ACTION</th>
<th>PROGRAM/SERVICE</th>
<th>ACTIVITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Application Processing</td>
<td>MDCP</td>
<td>Case Preparation</td>
</tr>
<tr>
<td>Annual Reassessment</td>
<td>Other DADS Programs/Services</td>
<td>Functional</td>
</tr>
<tr>
<td>Change</td>
<td></td>
<td>Assessment/Reassessment</td>
</tr>
<tr>
<td>Monitoring</td>
<td></td>
<td>Service Planning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other Casework Activity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data Entry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Travel</td>
</tr>
<tr>
<td>General Program Related</td>
<td>MDCP</td>
<td>Billing Problems</td>
</tr>
<tr>
<td></td>
<td>Other DADS Programs/Services</td>
<td>Handling Complaints</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Case Reading</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Processing Reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Answering Questions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Meeting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Email Correspondence</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reviewing Policy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other General Program Activity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Travel</td>
</tr>
<tr>
<td>Non Program Related</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non Work Related</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Confidence Intervals**

The study maintained a ninety-five (95.0%) percent confidence interval with a margin of error of +/- 3.5%.

The confidence interval is a mathematical description of the estimated range of values in which collected results are expected to fall. The degree of confidence, or confidence level, is an index of certainty that the probability of that expected range is true.

MDCP case managers collected 5,113 time samples during the six (6) month study period. Because of the large number of samples collected during the study the calculated standard times and derived percentages of time spent in given activities are both precise and statistically reliable.

**Data Integrity**

To ensure data integrity, PWM staff employed the following quality assurance steps and techniques:

- participants completed a PowerPoint presentation on the use of the PDA as a data collection instrument;
- participants received one-on-one telephone training, with written instructions;
- the PDA data collection structure only allowed logical activity entry combinations;
- PWM analysts reviewed submitted data with the participant throughout their study period;
- PWM analysts used data-cleaning procedures to identify and correct data entry errors prior to analysis of the data.
EXECUTIVE SUMMARY
Key Findings

Standard Times

Results are presented in “hh:mm” format:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Application Processing</td>
<td>09:14</td>
</tr>
<tr>
<td>Annual Reassessment</td>
<td>06:34</td>
</tr>
<tr>
<td>Change</td>
<td>01:05</td>
</tr>
<tr>
<td>Monitoring</td>
<td>01:10</td>
</tr>
</tbody>
</table>

Percentage of Time Spent in Case Actions

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Reassessment</td>
<td>33.7%</td>
</tr>
<tr>
<td>General Program Related</td>
<td>26.7%</td>
</tr>
<tr>
<td>Initial Application Processing</td>
<td>16.3%</td>
</tr>
<tr>
<td>Change</td>
<td>9.6%</td>
</tr>
<tr>
<td>Monitoring</td>
<td>9.2%</td>
</tr>
<tr>
<td>Non Work Related</td>
<td>2.3%</td>
</tr>
<tr>
<td>Non Program Related</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

Percentage of Time Spent in Program/Services

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDCP</td>
<td>92.5%</td>
</tr>
<tr>
<td>Other DADS Programs/Services</td>
<td>3.0%</td>
</tr>
<tr>
<td>Non Work Related*</td>
<td>2.3%</td>
</tr>
<tr>
<td>Non Program Related*</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

*Non Program Related and Non Work Related activities were captured as Case Actions and the percentages are included to account for this time.

Percentage of Time Spent in Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional Assessment/Reassessment</td>
<td>18.6%</td>
</tr>
<tr>
<td>Case Preparation</td>
<td>13.9%</td>
</tr>
<tr>
<td>Service Planning</td>
<td>13.5%</td>
</tr>
<tr>
<td>Travel</td>
<td>10.1%</td>
</tr>
<tr>
<td>Other Casework Activity</td>
<td>9.5%</td>
</tr>
<tr>
<td>Answering Questions</td>
<td>6.9%</td>
</tr>
<tr>
<td>Email Correspondence</td>
<td>5.1%</td>
</tr>
<tr>
<td>Other General Program Activity</td>
<td>4.8%</td>
</tr>
<tr>
<td>Data Entry</td>
<td>4.1%</td>
</tr>
<tr>
<td>Processing Reports</td>
<td>2.7%</td>
</tr>
<tr>
<td>Meeting</td>
<td>2.5%</td>
</tr>
<tr>
<td>Non Program Related*</td>
<td>2.3%</td>
</tr>
<tr>
<td>Non Work Related*</td>
<td>2.2%</td>
</tr>
<tr>
<td>Training</td>
<td>1.0%</td>
</tr>
<tr>
<td>Handling Complaints</td>
<td>0.9%</td>
</tr>
<tr>
<td>Reviewing Policy</td>
<td>0.6%</td>
</tr>
<tr>
<td>Case Reading</td>
<td>0.6%</td>
</tr>
<tr>
<td>Billing Problems</td>
<td>0.5%</td>
</tr>
</tbody>
</table>

*Non Program & Non Work Related activities were captured as Case Actions & the percents are included to account for this time.
STANDARD TIMES
Standard Time Definitions

Results of a work measurement study are normally expressed in the output of a “standard time.”

A “standard time” is the average time to perform or complete a given Case Action, from start to finish, within a given Program/Service. The time samples collected, Case Actions completed, and hours worked by participants serve as the basis for developing standard times and for determining percentages of time devoted to work activities. Standard time calculations include all time spent by Case Managers.

*Standard times are presented only where sufficient data is available to ensure statistical reliability. Where time samples or products completed for a Case Action/Program/Service combination were too low for reliable calculation, **NS (not sufficient)** is listed.*

*Standard times are stated in hours and minutes (e.g. 1 hour and fifteen minutes = 01:15).*

A standard time is calculated as follows:

\[
\text{Percent of Time Spent in Case Action & Program/Service Combinations}^2 \times \text{Net Hours Worked by Participants in the Study Period}^3 \div \text{Products Completed in Case Action & Program/Service Combinations}^4
\]

Case Actions Definitions

**Initial Application Processing:** All activities associated with processing an initial application for new program/services; from the receipt of the assignment/intake to the issuance of the notice of eligibility.

**Annual Reassessment:** All activity associated with re-determining program/service eligibility & reviewing service plans/authorizations.

**Change:** Assessing the need for and/or processing a change to the existing service plan/authorization between annual reassessments.

**Monitoring:** Involves a 30-day or Six month scheduled consumer contact as required by program/service guidelines.

**General Program Related:** Performance of any program/service related activity not associated with a specific case action listed above (e.g. handling complaints, case reading, billing problems, processing reports, answering questions, attending training & meetings, reviewing program email & policy, completing travel vouchers, attending Outreach presentations, etc.)

**Non Program Related:** Performance of any non-program related activity such as answering general questions, non-program training (e.g. Excel, Word, Outlook, etc.), staff meetings, non-program email, reviewing HR policy, etc.

**Non Work Related:** Break, rest-room, personal phone call, or work related to this study.

---

2 Calculated from time samples collected during the study period by participants.
3 Calculated from time/leave data provided by Human Resources: work hours available in each month, plus overtime earned, minus leave taken.
4 Calculated from product count data provided by regions, program area staff and automated systems.
Program/Service Definitions

**Medically Dependent Children Program (MDCP):** The MDCP provides a variety of services and supports for families caring for children who are medically dependent as an alternative to residing in a nurse facility.

**Other DADS Programs/Services:** Applicable for other DADS Program/Services (Not MDCP).

Standard Time Results

<table>
<thead>
<tr>
<th>Table 2: Standard Times in Hours and Minutes (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Application Processing</td>
</tr>
<tr>
<td>Annual Reassessment</td>
</tr>
<tr>
<td>Change</td>
</tr>
<tr>
<td>Monitoring</td>
</tr>
</tbody>
</table>
PERCENTAGE OF TIME
Case Action

The first level of data collected by case managers identified one of seven (7) possible case actions in which they were engaged at the time the PDA emitted a signal.\(^5\)

Figure 2 provides the percentage of time spent within each Case Action.

**Figure 2: Case Action**

Subsequent sections provide the percentage of time spent within each Program/Service and Activity for each case action depicted in Figure 2.\(^6\)

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\(^5\) General Program Related, Non Program Related, and Non Work Related are listed as case actions for collection purposes only.

\(^6\) Excluding Non Program Related and Non Work Related.
Program/Service

The second level of data collected by case managers identified one of four (4) possible Program/Service predicated by the case action selection.

Figure 3 provides the percentage of time spent within each Program/Service.\(^7\)

Figure 3: Program/Service

\(^7\) Non Program Related and Non Work Related is time spent without an associated Program/Service.
Activity

The third level of data collected by case managers identified one of sixteen (16) possible Activities predicated by the Case Action and Program/Service selections. Activities with percentages of less than one percent are not shown.

Figure 4 provides the percentage of time spent within each Activity; regardless of Case Action or Program/Service.

Figure 4: Activity

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional Assessment</td>
<td>18.6%</td>
</tr>
<tr>
<td>Case Preparation</td>
<td>13.9%</td>
</tr>
<tr>
<td>Service Planning</td>
<td>13.5%</td>
</tr>
<tr>
<td>Travel</td>
<td>10.1%</td>
</tr>
<tr>
<td>Other Casework Activity</td>
<td>9.5%</td>
</tr>
<tr>
<td>Answering Questions</td>
<td>6.9%</td>
</tr>
<tr>
<td>Email Correspondence</td>
<td>5.1%</td>
</tr>
<tr>
<td>Other General Program Activity</td>
<td>4.8%</td>
</tr>
<tr>
<td>Data Entry</td>
<td>4.1%</td>
</tr>
<tr>
<td>Processing Reports</td>
<td>2.7%</td>
</tr>
<tr>
<td>Meeting</td>
<td>2.5%</td>
</tr>
<tr>
<td>Non-Work Related</td>
<td>2.3%</td>
</tr>
<tr>
<td>Non-Program Related</td>
<td>2.2%</td>
</tr>
<tr>
<td>Training</td>
<td>1.0%</td>
</tr>
<tr>
<td>Case Reading</td>
<td></td>
</tr>
<tr>
<td>Billing Problems</td>
<td></td>
</tr>
</tbody>
</table>

Activity percentages of less than one (1.0%) percent not shown in Figure 4:

- Handling Complaints
- Reviewing Policy
- Case Reading
- Billing Problems

---

8 Non Program Related and Non Work Related activities were captured as Case Actions and the percentages are included to account for this time.
PERCENTAGE OF TIME BY CASE ACTION
Initial Application Processing

Initial Application Processing accounted for 16.3% of time samples collected (Figure 2, page 8).

The Program/Service selections for Initial Application Processing were MDCP and Other DADS Program/Service.

Within Initial Application Processing:

- MDCP accounted for almost ninety-nine (98.8%) percent of time.
- Other DADS Program/Service accounted for over one (1.2%) percent of time.

Figure 5 provides the percentage of time spent by Case Managers within Initial Application Processing.

![Figure 5: Initial Application Processing](image)

Other DADS Program/Service activities were less than one (1.0%) percent and are not shown in Figure 5.
Annual Reassessment

Annual Reassessment accounted for 33.7% of time samples collected (Figure 2, page 8).

The Program/Service selections for Annual Reassessment were MDCP and Other DADS Program/Service.

Within Annual Reassessment:

- MDCP accounted for ninety-seven (97.4%) percent of time.
- Other DADS Program/Service accounted for almost three (2.6%) percent of time.

Figure 6 provides the percentage of time spent by Case Managers within Annual Reassessment.

**Figure 6: Annual Reassessment**

<table>
<thead>
<tr>
<th>Activity</th>
<th>MDCP</th>
<th>Other DADS Program/Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional Assess/Reassess</td>
<td>32.4%</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Case Preparation</td>
<td>22.5%</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Service Planning</td>
<td>15.3%</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Travel</td>
<td>13.7%</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Other Casework Activity</td>
<td>8.0%</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Data Entry</td>
<td>5.6%</td>
<td>&lt;1%</td>
</tr>
</tbody>
</table>

Other DADS Program/Service activities were less than one (1.0%) percent and are not shown in Figure 6.
Change

Change accounted for 9.6% of time samples collected (Figure 2, page 8).

The Program/Service selections for Change were MDCP and Other DADS Program/Service.

Within Change:

- MDCP accounted for ninety-seven (97.0%) percent of time.
- Other DADS Program/Service accounted for three (3.0%) percent of time.

Figure 7 provides the percentage of time spent by Case Managers within Change.

![Figure 7: Change](image)

Other DADS Program/Service activities were less than one (1.0%) percent and are not shown in Figure 7.
Monitoring

Monitoring accounted for 9.2% of time samples collected (Figure 2, page 8).

The Program/Service selections for Monitoring were MDCP and Other DADS Program/Service.

Within Monitoring:

- MDCP accounted for almost ninety-seven (96.8%) percent of time.
- Other DADS Program/Service accounted for over three (3.2%) percent of time.

Figure 8 provides the percentage of time spent by Case Managers within Monitoring.

Other DADS Program/Service activities were one (1.0%) percent or less and are not shown in Figure 8.
General Program Related

General Program Related accounted for 26.7% of time sample collected (Figure 2, page 8).

The Program/Service selections for General Program Related were MDCP and Other DADS Program/Service.

Within General Program Activities:

- MDCP accounted for ninety-five (95.0%) percent of time.
- Other DADS Program/Service accounted for five (5.0%) percent of time.

Figure 9 provides the top five percentages of time spent by Case Managers within General Program Related. Over seventy-eight percent (78.1%) of the time spent occurred within the top five activities.

Figure 9: General Program Related

Other DADS Program/Service activities were one (1.0%) percent or less and are not shown in Figure 9.
General Program Related: All Activities

Table 3 provides the percentage of time MDCP case managers spent within all General Program Related activities.

Table 3: General Program Related by Program/Service - All Activities

<table>
<thead>
<tr>
<th>Program/Service</th>
<th>Activity</th>
<th>%</th>
<th>Total % by Program/Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDCP</td>
<td>Answering Questions</td>
<td>24.7%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email Correspondence</td>
<td>18.7%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other General Program Activity</td>
<td>17.5%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Meeting</td>
<td>8.6%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Processing Reports</td>
<td>8.6%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training</td>
<td>3.9%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Travel</td>
<td>3.6%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Handling Complaint</td>
<td>3.5%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reviewing Policy</td>
<td>2.2%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Case Reading</td>
<td>2.1%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Billing Problems</td>
<td>1.8%</td>
<td></td>
</tr>
<tr>
<td>Other DADS</td>
<td>Processing Reports</td>
<td>1.4%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Program/Service</td>
<td>Answering Questions</td>
<td>1.2%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Meeting</td>
<td>1.0%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email Correspondence</td>
<td>0.6%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other General Program Activity</td>
<td>0.5%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reviewing Policy</td>
<td>0.2%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Case Reading</td>
<td>0.1%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Billing Problems</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Handling Complaints</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Travel</td>
<td>0.0%</td>
<td></td>
</tr>
</tbody>
</table>
CONCLUSION
Limitations

Standard times were reported only for Case Action/Program/Service combinations where sufficient data was available with statistical reliability. Where time samples reported or case actions completed within a Case Action/Program/Service combination were insufficient for a reliable calculation a standard time was not listed.

PWM calculates standard times on Case Action/Program/Service combinations with time samples or a product count (e.g. completed Case Action) of thirty (30) or more.\(^9\) Standard times for unreported combinations can be provided, but without the level of statistical reliability as standard times presented within the report.

Product counts for completed Case Actions, as defined in the WMS, rely upon ad hoc query reporting of automated systems or counts provided by regional program staff.

Based upon the number of available Case Managers, standard time calculations are statistically valid at a statewide level. The small number of staff in each region would have required extensive sampling of participants to obtain sufficient data for reliable regional calculations.

As used in this report, standard times indicate the average amount of time Case Managers spend to complete a particular Case Action, not how much time the Case Action should have taken to complete.

There were no MDCP releases during the period of June through November 2009. As a result, all Initial Application Processing data are mainly based upon Money Follows the Person (MFP) conversions to MDCP.

Because this study was conducted for the six-month period of June through November 2009, rather than a full year, the impact of seasonality on this study is unknown.

Recommendation

To better inform agency leadership of the effects of major initiatives and address seasonal concerns, it is recommended that work measurement studies be conducted on a continuous basis.

---

\(^9\) Statistical research has demonstrated that as the sample size approaches or exceeds thirty (30) the distribution of the means moves closer to the norm. Accordingly, in order to report the most statistically reliable standard times, PWM has established a product count of thirty (30) as the threshold for publishing the calculation.
APPENDIX A

BASIC STUDY STATISTICS
APPENDIX A: Basic Study Statistics

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average number of hours on study</td>
<td>52.3</td>
</tr>
<tr>
<td>Average number of time samples per hour</td>
<td>2.4</td>
</tr>
<tr>
<td>Length of study in days</td>
<td>6.5</td>
</tr>
<tr>
<td>Population</td>
<td>44</td>
</tr>
<tr>
<td>Number of participants</td>
<td>44</td>
</tr>
<tr>
<td>Participation rate</td>
<td>100%</td>
</tr>
</tbody>
</table>
APPENDIX B

PDA POWERPOINT DEMO
APPENDIX B: PDA PowerPoint Demo

WMS Purpose

The Work Measurement Study (WMS) determines the amount of time spent on various LTSS activities.

WMS results are used by program management and budget staff to:

• assess the amount of time spent in various activities,
• evaluate the impact of program and policy changes,
• develop the Legislative Appropriations Request (LAR),
• develop accurate case weights, and
• equitably distribute agency resources.

PDA Orientation

Complete this demo prior to your telephone training with your Performance & Workload Measurement analyst.

You should have received:

• Personal Digital Assistant (PDA),
• PDA Cradle Charger, and
• Study Instruction Booklet.

The demo lasts 10 minutes.

Note: Please retain the packing material to return your equipment.
PDA Orientation

The orientation provides a "real-time" example of how to make entries for the WMS.

The demo has pre-set selections; use your mouse cursor to make the selections.

Have fun.

Your PDA

You will use these functions and features daily.

Turning on the PDA

NOTE: The demo has pre-set selection entries and will only produce responses matching the examples.
Starting the Study

Move your cursor over the “SamplePro Icon” and click to initiate the study software.

Entering Your User ID

Move your cursor over the “Keyboard Icon” and click to bring up the PDA keyboard.

Entering Your User ID

Your “User ID” is located on the front label of your study instruction booklet.
Enter your "User ID".

Move your cursor over the keyboard and click the keys to enter your "User ID".

"b"

"c"

"d"
Moving your cursor over the “Done” button and click to enter your “User ID.”
Use the backspace key for corrections.

Moving your cursor over the “Continue” button and click to complete sign on.

Moving your cursor over the “Start Study” button and click to begin the study.
"Sound" is the default setting that emits a beep for sample alerts.

"Buzz" causes the PDA to silently vibrate for sample alerts.

"LED" is not recommended since it is silent and you may miss sample alerts.

There are three options on how you want the PDA to signal. You may choose a combination of these options.

The "Sampling in Progress" screen is the primary screen where you wait for sample alerts. Once you are on this screen you have started the study. Resume your work duties and wait to respond to sample alerts.

To simulate a "Sample Alert" click anywhere on the screen.

Click "OK" to respond to the sample alert.

You have six minutes to make your selection. You will get a one-minute warning beep.
You have 6 minutes to respond to an alert. If you do not respond to the alert within 5 minutes, you get a "one-minute warning" signal. Click "OK" to respond to the sample alert.

If you don’t respond after the "one-minute warning" you will receive a final series of beeps to let you know you missed a sample alert.

For this example, click "Annual Reassessment" as the Case Action.

Your training instruction booklet provides the level menu definitions.

For this example, click "MDCP" for your Program/Service selection.

2. Choose the appropriate “Program/Service” for the activity you are engaged in at the precise time of the sample alert.
For this example, click “Service Planning” for your Activity.

3. Choose the appropriate “Activity” that you are engaged in at the precise time of the sample alert.

Review your entries before clicking “OK.” Corrections are made by clicking the first entry to re-display the selections.

4. After checking for accuracy, click “OK” to enter your selections.

Once you’ve entered your selections, you will return to the “Sampling in Progress” screen to await the next sample alert.

Repeat the four-step entry process for each sample alert.
There are three instances where you will ignore the sample alerts you receive:

- Lunch
- Leave
- Travel

You will enter Lunch/Leave/Travel time through the entry screens discussed in the following pages.

Click on the “Lunch/Leave/Travel” button to make these entries.

If this is the first entry of the day, the “Activity Log” will be blank. Click on the “New” button to access the selection menu.
Click on the "Lunch" selection to make a lunch entry.

For this example, click on the "12P" to enter the "hour" portion of the lunch "Start Time" entry.

The "Start Time" defaults to 8:00 AM.

For this example, click on the "30" to enter the "minutes."
You must enter an "End Time" to complete your entry.

For this example, click on the "1" to enter the "hour."

Click on the "30" to enter the "minutes."

Lunch/Leave/Travel entries always require both a "Start Time" and an "End Time."
After checking that selections are correct, click the "OK" button to submit the entries.

The "Activity Log" is now updated to include the entry.

Click the "Save" button to conclude the "Lunch" entry.

Leave and Travel entries follow the same procedure.

Once you've entered your selections, you will return to the "Sampling in Progress" screen to await the next sample alert.

Additional Lunch, Leave or Travel entries are made by repeating the preceding steps.

For accuracy, it is recommended that Lunch/Leave/Travel entries be made as soon as the activity ends.
Signing Off of the Study

It is very important that you remain logged on to the study as long as you are on “state time” and working.

Click the “Exit Study” button to start the log-off process.

Signing Off of the Study

Click the “End Study” button to exit the study. This is a critical step.

Be Sure to Recharge

Be sure to recharge the PDA each night using the charger cradle or the sync cable.
You will get a chance to perform actual "hands on" practice with the PDA during your training session with the PWM analyst.

The training session will take approximately one (1) hour to complete.

Contact the Performance and Workload Measurement Unit for questions.

workmeasurement@dads.state.tx.us

Thanks!
APPENDIX C

SELECTION GUIDE, STUDY CODES & DEFINITIONS
## APPENDIX C: Selection Guide and Study Codes & Definitions

### MDCP SELECTION GUIDE

<table>
<thead>
<tr>
<th>CASE ACTION</th>
<th>PROGRAM/SERVICE</th>
<th>ACTIVITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Application Processing</td>
<td>MDCP</td>
<td>Case Preparation</td>
</tr>
<tr>
<td>Annual Reassessment</td>
<td>Other DADS Programs/ Services</td>
<td>Functional Assessment/Reassessment</td>
</tr>
<tr>
<td>Change</td>
<td></td>
<td>Service Planning</td>
</tr>
<tr>
<td>Monitoring</td>
<td></td>
<td>Other Casework Activity</td>
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<td></td>
<td>Data Entry</td>
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<td></td>
<td></td>
<td>Travel</td>
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<tr>
<td>General Program Related</td>
<td>MDCP</td>
<td>Billing Problems</td>
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<td></td>
<td>Other DADS Programs/ Services</td>
<td>Handling Complaints</td>
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<td></td>
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<td>Case Reading</td>
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<td></td>
<td>Processing Reports</td>
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<td></td>
<td></td>
<td>Answering Questions</td>
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<td>Training</td>
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<td>Meeting</td>
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<td>Email Correspondence</td>
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<td></td>
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<td>Reviewing Policy</td>
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<tr>
<td></td>
<td></td>
<td>Other General Program Activity</td>
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<tr>
<td></td>
<td></td>
<td>Travel</td>
</tr>
<tr>
<td>Non Program Related.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non Work Related.</td>
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</tbody>
</table>

### MDCP STUDY CODES AND DEFINITIONS

<table>
<thead>
<tr>
<th>CASE ACTION</th>
<th>DEFINITION</th>
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</thead>
<tbody>
<tr>
<td>Initial Application Processing</td>
<td>All activities associated with processing an initial application for new program/services; from the receipt of the assignment to the preparation &amp; issuance of the notification of eligibility.</td>
</tr>
<tr>
<td>Annual Reassessment</td>
<td>All activity associated with re-determining program/service eligibility &amp; reviewing service plans/authorizations.</td>
</tr>
<tr>
<td>Change</td>
<td>Assessing the need for a change and/or processing a change to the existing service plan and/or authorization between annual reassessment or six month monitoring.</td>
</tr>
<tr>
<td>Monitoring</td>
<td>Involves a 30 Day or Six Month scheduled consumer contact as required by program/service guidelines.</td>
</tr>
<tr>
<td>General Program Related</td>
<td>Performance of any program/service related activity not associated with a specific case action listed above (e.g. handling complaints, case reading, billing problems, processing reports, answering questions, attending training &amp; meetings, reviewing program email &amp; policy, completing travel vouchers, attending outreach presentations, etc.)</td>
</tr>
<tr>
<td>Non Program Related</td>
<td>Performance of any non-program related activity such as answering general questions, non-program training (e.g. Excel, Word, Outlook, etc.), staff meetings, non-program related email, reviewing HR policy, etc.</td>
</tr>
<tr>
<td>Non Work Related</td>
<td>Break, rest-room, personal phone call, or work related to this study.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROGRAM/SERVICE</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medically Dependent Children Program (MDCP)</td>
<td>The MDCP provides a variety of services and supports for families caring for children who are medically dependent as an alternative to residing in a nursing facility.</td>
</tr>
<tr>
<td>Other DADS Program/ Services</td>
<td>Applicable for other DADS program/ services (not MDCP).</td>
</tr>
<tr>
<td>ACTIVITY</td>
<td>DEFINITION</td>
</tr>
<tr>
<td>----------</td>
<td>------------</td>
</tr>
</tbody>
</table>
| **Initial App Processing, Annual Reassessment, Change, Monitoring Activities** | Includes activities such as:  
- Scheduling Interview  
- Preparing case folder – evaluating application or active case as part of work planning (e.g., evaluating verifications or interviews needed, etc., usually as part of the certification or recertification process). |
| **Case Preparation** | Includes activities such as:  
- Service arrangement  
- IPC/Outside resources - Developing, discussing, &/or concurring with all parties in establishing the IPC. Includes related activities: inquiry, verification, documentation, etc. |
| **Functional Assessment/Reassessment** | Includes activities such as:  
- IPC/Outside resources - Developing, discussing, &/or concurring with all parties in establishing the IPC. Includes related activities: inquiry, verification, documentation, etc. |
| **Service Planning** | Includes activities such as:  
- HHSC forms for Disability Determination (Initial Only) – Any aspect of completing an application form (includes H3034, H3035)  
- HHSC forms for Medicaid Eligibility – Any aspect of the completion of an application form (includes H1200, H1010)  
- Requesting verifications – Conducting verification procedures by telephone, letter, fax, computer, or in person. Includes reviewing WTPY, SAVER, Form 2438 (Initial Only)  
- Analyzing case information – conducting an analysis to determine probable eligibility or continuation/change in eligibility status. |
| **Other Casework Activity** | Includes activities such as:  
- Consulting w/contracted providers (not complaints or billing issues)  
- Consultation with other agencies  
- Referrals to other resources  
- Activities associated with consumer refusal to comply with health & safety issues  
- Fair Hearing activities – activities related to hearings, preparation of material & sending it to the hearing officer, as well as attending  
- Translating  
- Narrative documentation  
- Notices/Correspondence  
- Staffings  
- Explaining consumer’s rights & responsibilities |
| **Data Entry** | Includes activities such as:  
- Data entry: SAS, Scheduler– Conducting any activity related to entries in the automated systems from manually completed forms. Includes SAS downtime |
| **Travel** | Any case-related travel; includes preparation, walking to your car, reviewing a map, etc. |
| **General Program Related Activities** | Includes activities such as:  
- Data entry: SAS, Scheduler– Conducting any activity related to entries in the automated systems from manually completed forms. Includes SAS downtime |
| **Billing Problems** | Any activity involved in resolving a reported billing problem for a specific consumer/case or program/service (e.g. service authorization issues, receipt of services, etc.). |
| **Handling complaints** | Any activity involved in resolving a reported complaint for a specific consumer/case or program/service. This DOES NOT include staffings (see Other Casework Activities). |
| **Case Reading** | All activities involving formal/informal case reading of selected cases for review; including the selection process, actual review, & reporting. |
| **Processing Reports** | Any activity associated with processing reports related to a specific program/service. |
| **Answering Questions** | Any general program/service related questions not related to a specific Case Action. |
| **Training** | Any program/service related training intended or required for the performance of your casework duties (e.g. specific program/service policy training, SAS training, CJST, WBT, etc.). Includes all time providing training/mentoring to other employees. |
| **Meeting** | Any program/service related meetings (e.g. COMMUNITY SERVICES conferences, presentations, health fair booths, professional seminars, etc.). |
| **Email Correspondence** | Any general program/service related email not related to a specific Case Action. |
| **Reviewing Policy** | Resolving/researching general program/service related policy issues not related to a specific Case Action. |
| **Other General Program Activity** | Any general program/service related activity, not related to a specific case/consumer that is not noted above. |
| **Travel** | All travel related to the general program/service related activities not related to a specific Case Action. Also includes preparation, walking to your car, reviewing maps, etc. |
Long Term Services & Support (LTSS)

Medically Dependent Children Program (MDCP)
Case Managers

WORK MEASUREMENT STUDY INSTRUCTION BOOKLET 2009
PURPOSE AND OVERVIEW

The Performance and Workload Measurement (PWM) unit of the Office of Budget and Data Management is conducting this Long Term Services and Supports (LTSS) work measurement study (WMS) at the request of the Chief Financial Officer and the Assistant Commissioner for Access and Intake.

The purpose of the WMS is to provide statistically valid and reliable information about the amount of time MDCP case managers spend performing various Community Service activities.

WMS results are used by managers as a tool to assess and analyze the impact of program and policy changes on the MDCP program. Agency budget analysts use the results in the development of the Legislative Appropriations Request (LAR), case weights, and the equitable distribution of agency resources.

What is a work measurement study?

A WMS is a systematic, statistically valid method of gathering information about the amount of time spent by staff on key functions and activities within the MDCP program.

The WMS documents the time spent in key functions and activities by collecting random work moments each day over a six-month study period.

During the six-month study period, randomly selected participants, with randomly selected start dates, collect data over approximately a one week period.

Why conduct a work measurement study?

The results of the WMS yield an accurate picture and model of how time is spent in the various key functions and activities of the MDCP program.

Budget analysts use the information to determine workload associated with current caseloads and to determine the level of staff needed to meet caseload demands.

What results are produced by work measurement studies?

The primary output of a WMS is the calculation of a Standard Time.

A standard time is the average time it takes to complete a specific process resulting in a quantifiable product or unit of work. For example, the product may be the number of initial applications processes completed.

The WMS also produces detailed information on the percentage of time spent in various key functions and activities.
CONTACTS AND TROUBLESHOOTING ASSISTANCE

Performance & Workload Measurement Unit (PWM)
Office of Budget & Data Management
Department of Aging & Disability Services
701 W. 51st Street, W-421
Austin, TX 78751

Fax: (512) 438-4370

Contacts for:

- General Study Questions
- PDA Equipment
- PDA Use

Jan Amazeen, Manager  (512) 438-3785
Rick Ash, Senior Analyst  (512) 438-5743
Hope Hargrove, Senior Analyst  (512) 438-3909
Brad Wood, Technical Analyst  (512) 438-4608

E-mail: workmeasurement@dads.state.tx.us

Please contact a PWM analyst for all hardware or software problems and questions.
WORK MEASUREMENT EQUIPMENT

PALM m500 PDA

You will be using a Palm M500 for the study, your study package should include the following items enclosed in protective bubble wrap:

- Palm PDA
- Palm Power Cord (AC Charger)
- Palm Synchronization Cradle

- The power cord for the Palm should be attached to the cradle's USB cord.
- You may also receive a sync/charger cable for use in the car or with your PC.
- It allows you to charge the PDA while in the car and to synch the PDA without use of the cradle.

NOTE: Please retain the bubble wrap and shipping package for returning your equipment upon completion of the study.
PDA HARDWARE SETUP

Plug the AC adapter into an AC current outlet (Figure 1). Connect the AC adapter cord to the cradle cable (Figure 2). The charger cable connects the same way (Figure 4).

Plug the PDA synchronization cradle/cable into any available USB port on your PC as shown below (Figure 4).

Be sure the AC Charger is plugged into a wall outlet (Figure 1) and the AC Charger cable is connected to the Cradle Cable (Figure 2).

The stand-alone Sync/Charger Cable can be used in your car with the Car Adapter (Figure 3) or plugged to the USB port of your PC.

**Note:** When charging the PDA, the PDA Cradle does not have to be connected to your computer.

**Palm Cradle Installation**

**Note:** The Palm Sync/Charger Cable connects to your desktop PC in the same manner.
PDA MAINTENANCE

Charge the PDA in the synchronization cradle or using the sync/charger cable as shown below:

Insert the PDA into the PDA Cradle as shown (Figure 1).

The stand-alone Sync/Charger connects to the PDA as shown (Figure 2).

Note: If you have inserted the PDA correctly, you will hear a short beep and see the On/Off button light up.

Remove the PDA from the PDA Cradle as shown (Figure 3).

The PDA removes from the Sync/Charger by squeezing the plug.

General Maintenance:

- Never use a pen, pencil, or other sharp object on the surface of the PDA screen.
- The PDA is not waterproof. Do not expose it to rain or other moisture.
- Do not drop the PDA or expose it to strong bumps or impacts.
- Keep the PDA away from heaters and other heat sources.
FAQ

The following graphic shows important features of your PDA:

Where is the stylus?

The stylus is located on the right side of the PDA in a designated slot.

What if I lose my stylus?

Contact the Performance & Workload Measurement unit (p.2) for replacement.

Why won’t my stylus tap where I am pointing?

Your stylus and PDA needs to be calibrated. Follow the Calibration Procedures to correct the problem (p.15). If the problem persists, contact the Performance & Workload Measurement unit.

Why does my PDA keep turning itself off?

The PDA has an automatic “sleep” feature to conserve battery power after two minutes of inactivity. Press the power button to “wake” the PDA. Sample alerts continue while in “sleep” mode.

Why won’t my PDA turn on?

The PDA’s battery may be low. Please make sure you charge your PDA every day (p. 5).

Why won’t my PDA charge?

Ensure all connections are secure (p.5). If you still have problems contact the Performance & Workload Measurement unit for instructions (p. 2).

For additional problems or questions, contact the Performance & Workload Measurement unit. See Contacts and Troubleshooting Assistance (p. 2).
STUDY INSTRUCTIONS OVERVIEW

General Instructions

When you begin each work day you will turn on the PDA, sign on to the work measurement study, and remain logged on until your work day ends. You will receive and respond to random “sample alerts” or signals throughout your work day. It is critical that you sign on to the study properly and remain logged on until your work day ends. Stopping and starting the PDA can alter the reliability of your collected data.

NOTE: Your “work day” is not just when you are working your normal office hours, but is defined as any time you are “on the clock” for state pay. If your day begins from home with work-related travel, log on to the study before traveling, or if you work after hours, do not log off the study until your work day ends. Your normal commute to and from the office does not count as work-related travel.

During lunch, remain logged on to the study. You will continue receiving sample alerts, but DO NOT respond; just ignore the signals. You will enter the time separately to account for lunch.

When driving, remain logged on to the study. You will continue receiving sample alerts, but DO NOT respond to the PDA signals (too dangerous). You will enter the time separately to account for travel.

Similarly, if you are temporarily off duty during the middle of the work day for sick or annual leave, ignore the sample alerts until you return to work. You will enter the time separately to account for leave.

Your 15-minute break is paid state time, respond using the Non Work Related case action entry.

Your participation in the study continues until you have successfully responded to at least one hundred (100) “good” sample alerts (approximately five days). The more diligently you respond to sample alerts, the sooner the study ends.

You should receive about twenty (20) sample alerts during the course of an average eight (8) hour work day (approximately 2.5 sample alerts per hour). For each sample alert you receive, you have a total of six (6) minutes to respond. If you do not make an entry, the PDA will provide a reminder beep when you have one (1) minute left. If you fail to make an entry you will receive a final “missed sample alert” beep.

If you miss responding to a sample alert, make a note of the time and activity and provide this information to your PWM Analyst. If you do not see the “Sampling in Progress” screen on your PDA, or your PDA fails to send a sample alert for over two (2) hours, you may need to re-sign on to the study.

PLEASE REMEMBER TO CHARGE YOUR PDA EACH DAY.

NOTE: You are responsible for maintaining the proper functioning of your PDA by keeping it fully charged using the cradle or charger cable.

At least once per week you are required to transmit or “Hot Sync” your collected data to the PWM server (See PDA Synchronization Procedures on p. 31).

When you “Hot Sync” your data, please call your analyst to verify that the data was received, to confirm the accuracy of the data, and/or provide information on any missed sample alerts you noted.

Your analyst will provide an update on your study progress and let you know when you have met the required number of time samples. When you have completed the study, your analyst will provide you with equipment return instructions.
## MDCP SELECTION GUIDE

<table>
<thead>
<tr>
<th>CASE ACTION</th>
<th>PROGRAM/SERVICE</th>
<th>ACTIVITY</th>
</tr>
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<tbody>
<tr>
<td>Initial Application</td>
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<tr>
<td>Processing</td>
<td>MDCP</td>
<td>Case Preparation</td>
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<td></td>
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<td>Functional Assessment/Reassessment</td>
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<td>Monitoring</td>
<td>Other Casework Activity</td>
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<td>Data Entry</td>
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<td>Travel</td>
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<tr>
<td>General Program</td>
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<tr>
<td>Related</td>
<td>MDCP</td>
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<td>Other DADS Programs/Services</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Travel</td>
</tr>
<tr>
<td>Non Program Related.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non Work Related.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### MDCP STUDY CODES AND DEFINITIONS

<table>
<thead>
<tr>
<th>CASE ACTION</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Application</td>
<td>All activities associated with processing an initial application for new</td>
</tr>
<tr>
<td>Processing</td>
<td>program/services; from the receipt of the assignment to the preparation &amp;</td>
</tr>
<tr>
<td></td>
<td>issuance of the notification of eligibility.</td>
</tr>
<tr>
<td>Annual Reassessment</td>
<td>All activity associated with re-determining program/service eligibility &amp;</td>
</tr>
<tr>
<td></td>
<td>reviewing service plans/authorizations.</td>
</tr>
<tr>
<td>Change</td>
<td>Assessing the need for a change and/or processing a change to the existing</td>
</tr>
<tr>
<td></td>
<td>service plan and/or authorization between annual reassessment or six month</td>
</tr>
<tr>
<td></td>
<td>monitoring.</td>
</tr>
<tr>
<td>Monitoring</td>
<td>Involves a 30 Day or Six Month Review scheduled consumer contact as required</td>
</tr>
<tr>
<td></td>
<td>by program/service guidelines.</td>
</tr>
<tr>
<td>General Program</td>
<td>Performance of any program/service related activity not associated with a</td>
</tr>
<tr>
<td>Related</td>
<td>specific case action listed above (e.g. handling complaints, case reading,</td>
</tr>
<tr>
<td></td>
<td>billing problems, processing reports, answering questions, attending training</td>
</tr>
<tr>
<td></td>
<td>&amp; meetings, reviewing program email &amp; policy, completing travel vouchers,</td>
</tr>
<tr>
<td></td>
<td>attending outreach presentations, etc.)</td>
</tr>
<tr>
<td>Non Program Related.</td>
<td>Performance of any non-program related activity such as answering general</td>
</tr>
<tr>
<td></td>
<td>questions, non-program training (e.g. Excel, Word, Outlook, etc.), staff</td>
</tr>
<tr>
<td></td>
<td>meetings, non-program related email, reviewing HR policy, etc.</td>
</tr>
<tr>
<td>Non Work Related.</td>
<td>Break, rest-room, personal phone call, or work related to this study.</td>
</tr>
</tbody>
</table>

### PROGRAM/SERVICE DEFINITION

<table>
<thead>
<tr>
<th>PROGRAM/SERVICE</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medically Dependent Children</td>
<td>The MDCP provides a variety of services and supports for families caring for</td>
</tr>
<tr>
<td>Program (MDCP)</td>
<td>children who are medically dependent as an alternative to residing in a</td>
</tr>
<tr>
<td></td>
<td>nursing facility.</td>
</tr>
<tr>
<td>Other DADS Program/Services</td>
<td>Applicable for other DADS program/services (not MDCP).</td>
</tr>
</tbody>
</table>
### MDCP STUDY CODES AND DEFINITIONS

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initial App Processing, Annual Reassessment, Change, Monitoring Activities</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Case Preparation</strong></td>
<td>Includes activities such as:</td>
</tr>
<tr>
<td></td>
<td>• Scheduling Interview</td>
</tr>
<tr>
<td></td>
<td>• Preparing case folder – evaluating application or active case as part of the work planning procedure (e.g. evaluating verifications or interviews needed, etc., usually as part of the certification or recertification process).</td>
</tr>
<tr>
<td><strong>Functional Assessment/Reassessment</strong></td>
<td>Includes activities such as:</td>
</tr>
<tr>
<td></td>
<td>• Service arrangement</td>
</tr>
<tr>
<td></td>
<td>• IPC/Outside resources - Developing, discussing, &amp;/or concurring with all parties in establishing the IPC. Includes related activities: inquiry, verification, documentation, etc.</td>
</tr>
<tr>
<td></td>
<td>• Form 2410</td>
</tr>
<tr>
<td></td>
<td>• Form 2065-B: authorizing services via SAS or by completing Form 2402, 2414, 2415, 2416, 8604.</td>
</tr>
<tr>
<td><strong>Service Planning</strong></td>
<td>Includes activities such as:</td>
</tr>
<tr>
<td></td>
<td>• HHSC forms for Disability Determination (Initial Only) – Any aspect of the completion of the an application form (includes H3034, H3035</td>
</tr>
<tr>
<td></td>
<td>• HHSC forms for Medicaid Eligibility – Any aspect of the completion of the an application form (includes H1200, H1010)</td>
</tr>
<tr>
<td></td>
<td>• Requesting verifications – Conducting verification procedures by telephone, letter, fax, computer, or in person. Includes reviewing WTPY, SAVERR, etc.</td>
</tr>
<tr>
<td></td>
<td>• Form 2438 (Initial Only)</td>
</tr>
<tr>
<td></td>
<td>• Analyzing case information – conducting an analysis of information to determine probable eligibility or continuation/change in eligibility status.</td>
</tr>
<tr>
<td></td>
<td>• Denials &amp; Terminations</td>
</tr>
<tr>
<td></td>
<td>• Resolving/researching policy issues</td>
</tr>
<tr>
<td></td>
<td>• Documenting eligibility decision</td>
</tr>
<tr>
<td></td>
<td>• Assessing the overall satisfaction with program/services</td>
</tr>
<tr>
<td><strong>Other Casework Activity</strong></td>
<td>Includes activities such as:</td>
</tr>
<tr>
<td></td>
<td>• Consulting w/contracted providers (not complaints or billing issues)</td>
</tr>
<tr>
<td></td>
<td>• Consultation with other agencies</td>
</tr>
<tr>
<td></td>
<td>• Referrals to other resources</td>
</tr>
<tr>
<td></td>
<td>• Activities associated with consumer refusal to comply with health &amp; safety issues</td>
</tr>
<tr>
<td></td>
<td>• Fair Hearing activities – activities related to hearings, including preparation of material related to the appeal &amp; sending it to the hearing officer, as well as attending the hearing.</td>
</tr>
<tr>
<td></td>
<td>• Translating</td>
</tr>
<tr>
<td></td>
<td>• Narrative documentation</td>
</tr>
<tr>
<td></td>
<td>• Notices/Correspondence</td>
</tr>
<tr>
<td></td>
<td>• Staffings</td>
</tr>
<tr>
<td></td>
<td>• Explaining consumer’s rights &amp; responsibilities</td>
</tr>
<tr>
<td><strong>Data Entry</strong></td>
<td>Includes activities such as:</td>
</tr>
<tr>
<td></td>
<td>• Data entry: SAS, Scheduler – Conducting any activity related to entries in the automated systems from manually completed forms.</td>
</tr>
<tr>
<td></td>
<td>• Includes SAS downtime</td>
</tr>
<tr>
<td><strong>Travel</strong></td>
<td>Any case-related travel; includes preparation, walking to your car, reviewing a map, etc.</td>
</tr>
</tbody>
</table>
### MDCP STUDY CODES AND DEFINITIONS

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Program Related Activities</strong></td>
<td></td>
</tr>
<tr>
<td>Billing Problems</td>
<td>Any activity involved in resolving a reported billing problem for a specific consumer/case or program/service (e.g. service authorization issues, receipt of services, etc.).</td>
</tr>
<tr>
<td>Handling complaints</td>
<td>Any activity involved in resolving a reported complaint for a specific consumer/case or program/service. This DOES NOT include staffings (see Other Casework Activities).</td>
</tr>
<tr>
<td>Case Reading</td>
<td>All activities involving formal/informal case reading of selected cases for review; including the selection process, actual review, &amp; reporting).</td>
</tr>
<tr>
<td>Processing Reports</td>
<td>Any activity associated with processing reports related to a specific program/service.</td>
</tr>
<tr>
<td>Answering Questions</td>
<td>Any general program/service related questions not related to a specific Case Action. Answering questions regarding a specific consumer/case should be reported under the appropriate Case Action.</td>
</tr>
<tr>
<td>Training</td>
<td>Any program/service related training intended or required for the performance of your casework duties (e.g. specific program/service policy training, SAS training, CJST, WBT, etc.). Includes all time providing training/mentoring to other employees.</td>
</tr>
<tr>
<td>Meeting</td>
<td>Any program/service related meetings (e.g. LTSS conferences, presentations, health fair booths, professional seminars, etc.).</td>
</tr>
<tr>
<td>Email Correspondence</td>
<td>Any general program/service related email not related to a specific Case Action. Answering questions regarding a specific consumer/case should be reported under the appropriate Case Action for the program/service.</td>
</tr>
<tr>
<td>Reviewing Policy</td>
<td>Resolving/researching general program/service related policy issues not related to a specific Case Action.</td>
</tr>
<tr>
<td>Other General Program Activity</td>
<td>Any general program/service related activity, not related to a specific case/consumer that is not noted above.</td>
</tr>
<tr>
<td>Travel</td>
<td>All travel related to the general program/service related activities not related to a specific Case Action.</td>
</tr>
</tbody>
</table>
TURNING ON THE PDA

This screen is your “home” screen.

- Turn on the PDA by pressing the “On/Off” button at the top right corner of the device.

Note: If you do not see this screen when you turn on your PDA, use your stylus to tap the “Home” button until this screen appears.

The following actions calibrate your PDA.

- Tap the “Welcome” Icon.

Note: Calibrating the PDA sets the parameters to your screen touch. This allows you to more accurately select your entries.
CALIBRATION PROCEDURES

This is the “Set Up screen.

- Tap anywhere on the screen.

Time for target practice!

- Tap the center of each target.

Note: You will receive a series of these targets, it is important that you tap exactly in the center of each target.
CALIBRATION PROCEDURES

You can correct the date & time if necessary.

- Tap the “Next” button to continue.

Note: If your time & date settings are incorrect, your analyst can walk you through the correction process. To correct these entries, tap on the entry to make the change.

This completes the calibration process.

- Tap the “Done” button.

Note: If you have problems with the stylus not tapping accurately during the study, repeat the calibration procedures (p. 13-15).
SIGN-ON PROCEDURES

The sign-on procedures must be used each time you log on to the study.

• Tap the “SamplePro” icon.

Note: If you do not see these four icons, tap the “Home” button until the screen appears.

This is the “User Ref” screen for entering your User ID.

• Tap the “Keyboard” icon (_kb_).

Note: Your “User ID” is located on the label on the front of your study instruction booklet. You will enter your “User ID” each day to log on to the study.

Alert your PWM analyst if the study name reads anything other than MDCP 2009.
SIGN-ON PROCEDURES

This is the keyboard screen for entering your User ID.

- Tap in your four-letter “User ID”
- Tap the “Done” Button.

Note: The “User ID” is NOT case sensitive.
If you make an error, the backspace key is located in the right hand corner.

Entering your “User ID” correctly is important to avoid the loss of your data.

- Tap the “Continue” Button.

Note: Make sure your User ID is correctly listed in the User Ref box.
SIGN-ON PROCEDURES

Tapping “Start Study” begins the study and starts the PDA’s sampling alerts.

• Tap the “Start Study” button.

Note: This is a critical entry screen from which you begin and end the study each day.

This is the “Sampling in Progress” screen.

The study is now in progress and this screen is where you will wait for all sample alerts.

Once you see this screen, you can return to work until the PDA signals you to respond.

• The “Lunch/Leave/Travel” button will be discussed later (p. 23).
• The “Exit Study” button will be discussed later (p. 27).
• THE “Sound,” “LED” and/or “Buzz” checkboxes allow you to change how the PDA signals.

Put your PDA away for now and refer to the following pages while your analyst explains the selection instructions for when you receive a sample alert. If you receive a sample alert during the training let your analyst know.
This is the "Sampling Alert" screen.

When you receive a sampling alert signal, you are prompted for an entry by the device.

The sampling alert screen is shown here.

Tapping the "OK" button takes you to the data collection screen.

**Note:** You have six (6) minutes in which to respond to a sample alert.

If you do not tap "OK" within five (5) minutes, you will receive a one-minute warning.

This is the "Sampling Alert Warning" screen.

The one-minute warning screen is shown here.

Tapping the "OK" button takes you to the data collection screen.

**Note:** If you have not entered a selection after one-minute you will receive a series of beeps indicating you have missed an alert.
DATA ENTRY

This is the first level selection menu.

The Case Action selection menu is shown.
You must choose a Case Action best describing your current activity.
Use your stylus to tap on your selection.
In this example:
  • Annual Reassessment

Note: The “Exit” and “Note” buttons are not used in this study.

This is the second level selection menu.

Your Case Action selection is shown and the Program/Service selection menu is a drop-down.
Based upon your chosen Case Action, you must now choose a specific Program/Service best describing your current activity.
The choices of the Program/Service selection menu are based upon your Case Action selection.
In this example:
  • MDCP
This is the third level selection menu.

Your Case Action & Program/Service selections are shown and the Activity selection menu is a drop-down.

Based upon your Case Action & Program/Service selections, you must now choose a specific Activity best describing your current activity.

The choices of the Activity selection menu are based upon your previous Case Action & Program/Service selection.

In this example:

- Service Planning

This is the selection summary & entry screen.

Your Case Action, Program/Service, & Activity selections are summarized. Review the entries for accuracy.

Tapping the “OK” button enters your selections.

You will be returned to the “Sampling in Progress” screen to wait for your next sample alert.

Note: If corrections are required, tap the first selection (Case Action) to re-display the menus.

In this example: Annual Reassessment
DATA ENTRY

The entry process leads you back to the “Sampling in Progress” screen.

From the “Sampling in Progress” screen you will wait for your next sample alert.

From this screen you will initiate the next lesson in your training:

- Lunch/Leave/Travel

Note:

As discussed in the General Instructions (p. 7), there are three (3) instances where you ignore the sample alerts you receive:

- when you have lunch
- when you take leave during the day (but will return)
- when you travel in a car or plane

Any time you are engaged in one of these activities you will not respond to PDA sample alerts.

<< STOP >>

Retrieve your PDA to continue the rest of your training session. Press the power button to wake the device from “sleep” mode.
The “Lunch/Leave/Travel” function allows you to account for time during the study in which you will not respond to sample alerts.

- Tap the “Lunch/Leave/Travel” button.

**Note:** The “Lunch/Leave/Travel” entries require you to enter a start and end time. For accuracy, it is recommended that you make these entries immediately after your lunch, taking leave, or after travel.

This is the “Activity Log” screen.

- Tap the “New” button.

**Note:** “Lunch/Leave/Travel” entries for each day are summarized on the Activity Log. If this is your first “Lunch/Leave/Travel” entry, your screen will be blank.
The menu displays a list for lunch, leave, & travel.

- Tap on the “Travel” entry.

The “Activity Log” screen & entries are the same for Lunch, Leave, or Travel.

The “Start Time” box is highlighted and defaults to 8:00 am.

- Tap the “End Time” box.
- Tap the hour 09 & the minute 15.

The system will calculate the total elapsed time and present it for confirmation purposes.

- Tap the “OK” button.

**Note:** You must enter a “Start Time” AND an “End Time” to complete your entry.

Use the scroll bars to reveal times not shown.
LUNCH/LEAVE/TRAVEL

The “Activity Log” will list each entry you make.

- Tap the “Save” button.

Note: If you have additional entries, tap “New” and repeat the entry process.

Tapping the “Save” button will return you to the “Sampling in Progress” screen.

An example of multiple listings.
LUNCH/LEAVE/TRAavel

You can correct Lunch/Leave/Travel entries.

To correct an entry, tap it with the stylus to bring up the Edit/Delete screen.

Tapping “edit” will return you to the time entry screen. Tapping “delete” will erase the entry.

Note:

If you receive a sample alert prior to saving your “Lunch/Leave/Travel” entry, the “Sampling Alert” screen appears and requires a response.

Your entry in this situation will be “Non Work Related” since you were working on the study at the time of the signal.

Sample alert signals take priority and will exit you from “Lunch/Leave/Travel.”

After entering “Non Work Related,” you must restart the “Lunch/Leave/Travel” entry process over (p. 23).
ENDING THE STUDY DAY

It is important to log off the study each day.

- Tap the “Exit Study” button.

Note: If you do not exit the study, your device will continue to signal.

Don’t forget to “End Study” to complete the log off process.

- Tap the “End Study” button.

Note: Logging off returns you to the four-icon start screen (p. 13) where you turn off the device.
ENDING THE STUDY DAY

You can now turn off the PDA.

- Press the “On/Off” button to turn off the device.

Notes:
PDA SYNCHRONIZATION PROCEDURES

The synchronization process, called the “Hot Sync Operation” or “Sync,” is the transferring of information between a computer and a PDA. The PDA transfers data to your computer, which then transfers the data to a Performance & Workload Measurement server.

Palm PDA Sync Procedures

1. Place the PDA in the cradle

2. Press the “Hot Sync” button on the cradle as shown below (Figure 1). If you are using a sync/charger cable, you will tap the “Hot Sync” icon (Figure 2) and the “Hot Sync” button (Figure 3):

   ![Figure 1: PDA in cradle with Hot Sync button highlighted](image1.png)
   ![Figure 2: Hot Sync Icon](image2.png)
   ![Figure 3: Hot Sync Button](image3.png)

   **Note:** To successfully “sync” the cradle must be plugged in to the USB port of your computer.

3. The first time you sync the PDA, the following message will appear:

   ![New Hardware Found](image4.png)

   Windows is installing the software for your new hardware.

   The above message will disappear when the following message comes up:

   ![Network HotSync](image5.png)

   Create a new account on this PC?

   [OK] [Cancel]
PDA SYNCHRONIZATION PROCEDURES

When you tap on the “OK” button, the following message may appear:

```
Network HotSync

The 'Network' option is not checked in the HotSync Manager menu. If you want to perform a HotSync operation via the network, cancel this dialog and check the 'Network' option.

Otherwise, click OK.

OK    Cancel
```

Tap on the “OK” button.

4. When synchronization begins, the following screen appears:

```
HotSync Progress

Status: Identifying user
User: EM244

Note: The status will rapidly scroll through numerous headings.
```

5. While synchronization is in progress, a screen similar to the following will be displayed:

```
HotSync Progress

Status: Synchronizing Memo Pad
User: EM244

Note: The status will rapidly scroll through numerous headings.
```
PDA SYNCHRONIZATION PROCEDURES

When synchronization has completed, the message below will appear:

![Data Sync Successful](image)

Leave the message on the screen.

6. **When the PDA has finished synchronizing, repeat step 2.**
   
   *This is a critical step: YOU MUST SYNCHRONIZE TWICE.*

7. You should receive the same successful message as shown above after the second sync.

8. Tap “OK” on the two messages to clear them from your screen.

9. Remove the PDA from the cradle.

10. If synchronization is unsuccessful, contact your analyst (p. 2).

11. You will return to the “Hot Sync Screen” upon completion, tap the “Home” button to return to the four-icon sign on screen (p. 13).

![PDA Hot Sync Screen](image)

After hot-syncing, tap the “Home” button to return to the four-icon sign on screen (p. 13).
12. Once you have completed syncing the PDA and returned to the icon sign on screen, you can restart the study, or turn off the PDA as necessary.

- Press the “On/Off” button to turn off the device.

**Note:** Hot-syncing will exit you out of the study, if your work day continues after syncing, you must restart the study after syncing.