

Monterey County Behavioral Health Quality Improvement

Re:	Employee Activity Report
Form Reference	314 Employee Activity Report
Initial Release Date	10/23/2023
Effective	7/1/2023

Purpose

Monterey County Behavioral Health (MCBH) has developed the **Employee Activity Report** which reflects finalized services and calendar activities captured in Avatar. This report includes (1) a summary level of services and (2) detailed sub reports that reflect various activities staff complete throughout their workday for a selected date range.

This report takes into consideration staff that work full time and can also accommodate staff who are less than full time (i.e. 32 or 20 hour a week).

Limitations:

- For staff that are scheduled to work on weekends: this report will capture all service/calendar activities, even those that occur on weekends. **If you have a work schedule other than Monday – Friday from 8-5pm, please contact 415-QA@co.monterey.ca.us to modify/update your Avatar Scheduling Calendar. Please include in the subject line: Employee Activity Report Scheduling Calendar.**
- For staff that work 9/80s or 4/10 schedules: this report should have a start date and end date that corresponds with a two week pay period. If staff who work 9/80s or 4/10s do not run this reporting during a complete two week pay period, the report may over/under capture your total percentage of work time.

Procedure

- The 314 Employee Activity Report will be available in Avatar starting 10/23/2023.
- The Employee Activity Report will capture activities entered in Avatar starting 7/1/2023 via a finalized progress note and Avatar Scheduling Calendar. This

report will not run for dates prior to 7/1/2023.

- In order for the Employee Activity Report to reflect staff activities, staff must ensure they are finalizing their progress notes and accurately entering time in the Avatar Scheduling Calendar.
- The Employee Activity Report is a staff based report for a selected date range
- Only finalized progress notes and Avatar Scheduling Calendar time is reflected in this report.
 - “Claimable Services” and “Lock Out/ Non-Claimable Services” is captured through finalized progress notes in Avatar.
 - “Other time (from appt sched)” is time accounted for in the Avatar Scheduling Calendar.
 - “Total Activity” is the sum of “Claimable Services” and “Lock Out/ Non-Claimable Services” and “Other time (from appt sched)”. Claimable Services may change from week to week depending on error resolution completed by QI/Billing.
- **Holiday: this is a NEW Avatar Scheduling Calendar code.** The Holiday 804 code is used to reflect a county holiday. Staff who do not work on holidays must enter the 804 code for 8 hours/480 minutes to account for a full day. This time will be reflected in the “Vacation/Sick/Holiday” line of the Employee Activity Report. **If staff are scheduled to work on a county holiday, do not use this code.**
- **Abbreviated Schedule: this is a NEW Avatar Scheduling Calendar code.** The Abbreviated Schedule 828 code is only permissible for staff who have a reduced work schedule (less than 80 hours per pay period). This code reduces the number of minutes an employee works from a workday. **This code must not be used to account for vacation, sick, or county holiday.**
 - For example, you are a .5 FTE (20 hour a week) employee who works full days on Mondays and Wednesdays and half days Friday.
 - Abbreviated schedule would be used to block out non-working days for 8 hours on Tues/Thursday and 4 hours on Friday.
 - **Please consult with your supervisor before using an abbreviated schedule code.**

This memo and report are NOT intended to communicate sustainability standards. Please contact your direct supervisor for expectations.

Exhibit A



**Monterey County Health Department
Behavioral Health Bureau**
Employee Activity Report

Date Range of 7/1/2023 to 7/31/2023

During this time there were 20 work days totaling 9,000 minutes

Practitioner Name: [REDACTED]

Staff ID: [REDACTED]

Claimable Services			Total Services: 41
Direct Service	3,019	33.5%	a. Click on hyper-link to view sub-report (details of all services for the selected date range)
Documentation	3,695	41.1%	
Travel	1,380	15.3%	
Lock-out / Non-Claimable Services			Total Services: 14
Direct Services	118	1.3%	b. Vacation/Sick/Holiday : this includes 803 (Vacation/Sick) and 804 (Holiday) codes that are entered in the Scheduling Calendar
Documentation	357	4.0%	
Travel	0	0.0%	
Other Time (from appt sched)			Total Services: 5
Interpretation	0	0.0%	c. Other Services/Activities : all other codes used in the staff's calendar will be captured here
Training	0	0.0%	
QI / QA	0	0.0%	
Non-Working Hours	0	0.0%	d. The sum of all service activity (in minutes) for the selected date range
Vacation/Sick/Holiday	0	0.0%	
Supervision	120	1.3%	e. The percentage of accounted service activity based on the total minutes for the indicated date range (8,989/9,000 x 100 = 99.9%)
Other Services/Activities	300	3.3%	
Abbreviated Schedule*	0	0.0%	
Total Activity			
Total:	8,989	99.9%	*Abbreviated Schedule is not part of the Total Activity totals.

a

a. Click on [hyper-link](#) to view sub-report (details of all services for the selected date range)

b. **Vacation/Sick/Holiday**: this includes 803 (Vacation/Sick) and 804 (Holiday) codes that are entered in the Scheduling Calendar

c. **Other Services/Activities**: all other codes used in the staff's calendar will be captured here

d. The sum of all service activity (in minutes) for the selected date range

e. The percentage of accounted service activity based on the total minutes for the indicated date range (8,989/9,000 x 100 = 99.9%)

b

c

d

e

Definitions

Progress Note Documentation:

Direct Service, Documentation, and Travel Time is calculated by time entered in via a finalized progress note.

- Direct Service: time is spent with the beneficiary for the purpose of providing a service and in some cases, time spent with the members of the beneficiary's care team, with family members or other supports, and other community support services.
- Documentation: time it takes to document the service within the electronic health record such as writing progress notes or complete other forms of documentation (i.e. CalAIM Assessment) when the beneficiary is not present.
- Travel: time spent traveling to and from your work location to provide a service to the beneficiary at their home or in the community.
- Lock-out/Non-Claimable Services: This includes the following service codes: 330CA Non-Billable, Lock-out codes, and No Medical Necessity codes; Direct Service, Documentation, and Travel are defined as above for the Lock-out/Non-claimable section of the report.

Common Scheduling Calendar Codes:

The following codes must be documented in the Avatar Scheduling Calendar in order to appear on the Employee Activity Report.

- Interpretation: 5002 code used for a third party providing sign language/oral interpretation during the beneficiary service for another rendering provider and is NOT considered translation (i.e. interpretation is oral translation is written).
- Training: this includes all trainings codes as an 823.
- QI/QA: this includes any activity that falls under the 802 codes and/or trainings identified as 802 (i.e. Law and Ethics, CPI).
- Non-Working Hours: the 809 code is used when staff participate in jury duty or other activities as directed.
- Vacation/Sick Hours: the 803 code is used to reflect time when a staff member was on vacation, used educational leave, or was out sick. **Staff must enter the 803 code for 8 hours/480 minutes to account for a full day.**
- ***NEW* Holiday: the 804 code is used to reflect a county holiday. Staff who do not work on county holidays must enter the 804 code for 8 hours/480 minutes to account for a full day. This time will be reflected in the "Vacation/Sick/Holiday" line of the Employee Activity Report. Staff who are scheduled for holidays do not use this code.**
- Supervision: the 807 code is used for general individual or group supervision received by the staff that is not billed to a beneficiary's chart.
- Other Services/Activities: all other codes used in the staff's calendar will be captured here.
 - Note: 818 Practitioner of the Day and 819 Access to Treatment does not factor into the service activities on the report

- *NEW* Abbreviated Schedule: the 828 code is only permissible for staff who have a reduced work schedule (less than 80 hours per pay period). This code reduces the number of minutes an employee works a day. **This code must not be used to account for vacation, sick, or county holiday.**
 - Staff members who are a part-time employees (i.e. 20 hours a week) or has an officially adjusted work schedule (i.e. 32 hour work week versus a 40 hour work week) will use the 828 code on the scheduling calendar to account for the non-working days.