



## National Kidney Foundation Council of Nephrology Social Workers

# CNSW Time Study Instruction Sheet

### INTRODUCTION

The Department of Health and Human Services, Centers for Medicare and Medicaid Services (CMS), published the Final Conditions for Coverage (CfC) for End-Stage Renal Disease (ESRD) Facilities on April 15<sup>th</sup>, 2008. Most provisions of the CfC became effective on October 14, 2008.

The Council of Nephrology Social Workers (CNSW) established a social work task force to develop resources and tools to assist facilities and social workers in complying with new requirements in the CfC. Because of the new requirements and increased emphasis on the clinical role of nephrology social workers, many social workers will likely find themselves faced with additional demands on their already full schedule and workload.

Because of divergent priorities, limited budgets, and other factors, it may be difficult for some social workers to fully explain to managers the impact of the new Conditions for Coverage on their workload. It was for this reason that the task force created the CNSW Time Study Tool. This tool can be used by a dialysis facility social worker to capture the impact of individual tasks on their workload.

With this tool, the social worker would track the amount of time spent on individual jobs tasks for each work day, for one month, and then transfer the data to an Excel spreadsheet. The Excel spreadsheet would automatically generate a report. This report would assist the social worker in having a structured discussion with their manager regarding the individual job tasks.

The following document contains instructions for using these components of the tool:

- I. Task Glossary
- II. Daily Time Tracking Tool (Options 1 & 2)
- III. Monthly Time Tracking Tool
- IV. Summary Report

## I. Task Glossary

The following table provides a list of job tasks (and definitions) most commonly performed by social workers in outpatient dialysis facility settings. The job tasks are grouped into four general categories: Clinical, Administrative and Clerical, Insurance, and Other. The job tasks are used to capture the various activities performed by a nephrology social worker on several tracking logs described later in this document. You may need to refer to this table when completing the logs.

Because social workers tend to have a broad range of experiences, skills, and interests, each nephrology social worker may assume some unique job responsibilities not contained in this table. Furthermore, the culture and nature of the dialysis facility (small versus large, rural versus urban, etc.) also tends to influence job responsibilities.

When using the individual components of this tool, you may choose to add additional job tasks.

*Please note:* If modifications are made to the Excel spreadsheet for the Monthly Time Log, the automatic calculations on the time log and automatic tables in the Summary Report may not operate correctly.

<b>Clinical Tasks</b>	
<b>Task</b>	<b>Definition</b>
Assessments	All activities involved in completing patient assessments and reassessments, including interviewing the patient, collaborating with other team members, reviewing medical records, etc.
Care Planning	All activities involved in the development of the Plan of Care, including discussions with patients/family, collaboration with other team members, writing the care plans, attending care plan meetings, etc.
Comm Resources	Coordinating with community resources (i.e. case managers, home health agencies, mental health providers, long term care facilities, etc).
Counseling, Pt/F	The professional application of social work methods and values in advising/providing guidance to individuals, families, or groups for the purpose of enhancing, protecting, or restoring the capacity for coping with the social environment; includes giving advice, delineating alternatives, helping to articulate goals, and providing needed information.
Consulting-Staff	Discussions with staff members regarding the psychosocial aspects of the patient and integrating it with their care plan.
Documentation	Social work notes, memos, etc. pertaining to patient's care and interventions.
DPC	Decreasing dialysis patient-provider conflict and any involvement in patient complaints, disputes, and grievances.
Education, Pt/F	Providing information on ESRD, dialysis, modality options, advance directives, and community resources.
QAPI	Activities related to the facility's Quality Improvement Program.
QOL Surveys	Involvement in the distribution, completion, collection, tabulation, documentation, tracking, and reporting of results.

Rehabilitation	Interventions related to the goal of rehabilitation, such as referrals, advocacy, career counseling, etc.
Research/Writing	Working on research projects for your company, professional organization, private institutions, etc. Working on materials for publications.
<b>Administrative and Clerical Tasks</b>	
Admissions	Tasks associated with incoming patients, including communication with other care providers, patient, and/or others, faxing/ mailing required forms, receiving medical information, coordinating with other care team members, obtaining insurance information, coordinating/obtaining signatures on initial admission forms, etc.
Applications	Activities related to the process of completing, submitting, tracking, and follow-up of applications for assistance programs.
Clerical	Copying, faxing, filing, obtaining signatures on forms, answering the main phone line at the facility. Completing required CMS forms such as 2728 or entering data into the CMS Crown Web system.
Correspondence	Facilitating letters, forms pertaining to patient's care and interventions for employers, government agencies, etc.
HIPAA Duties	Tasks associated with HIPAA, including Privacy Officer role, accounting for disclosures, completing forms, and copying/sending medical records.
Medication-related	Assessing and applying for community prescription programs. Coordinating pre-authorization/exception requests. Contacting patient pharmacy for compliance issues. Accessing community programs for direct financial assistance.
Organize/Prepare	Daily routine to organize and prioritize workload/tasks/e-mails, to-do or check-off lists. Organizing files of information on various topics, such as patient education information/handouts, community resources information, and applications.
Satisfaction Survey	Any involvement in the distribution, completion, collection, tabulation and reporting of results.
Scheduling Pts.	Any involvement in the scheduling of the patient's permanent or temporary schedules.
Supervision	Responsibilities for supervising SW or clerical staff, including education/training, chart audits, completing performance evaluations.
Transient Dialysis	Involvement in locating, contacting, providing medical information and coordinating with insurance, patient and transient unit. Involvement in being contacted, receiving medical information and coordinating with staff, insurance, patient and unit.
Transportation	Involvement in the registering, scheduling and coordination of patient transportation.

<b>Insurance</b>	
<b>Task</b>	<b>Definition</b>
AKF-HIPP	Assessing, filing out forms, faxing, coordinating with AKF/AKF designee, checking on payment, problems and troubleshooting.
Billing/AR	Coordination through phone calls, e-mails, conference calls and meetings.
Insurance/MSP	Obtaining, filling out, mailing and follow-up of patient obtaining various health insurances (Medicare, secondary insurance, etc.). Coordinating with health insurers regarding authorizations, benefits, referrals, terminations, etc. Supervising of, or performing, the completion of Medicare Secondary Payer forms.
<b>Other</b>	
<b>Task</b>	<b>Definition</b>
Breaks	Daily breaks and mealtime
Company Educ.	Mandatory staff education/in-services on company specific policies/procedures. Safety, infection control, Risk Management meetings. Outside agencies coming to unit and providing information/education as related to their product line.
Meetings-Profes.	Outside professional meetings, seminars, and conferences ( i.e. CNSW, NKF, AKF, NASW, other CEU resources).
PTO/Sick time	Vacations, illnesses, leaves of absence.
Travel Time	Traveling between multiple units that uses hours from your work week that might otherwise be used direct/indirect for patient care tasks.

## II. Daily Time Track Tool (Options 1 & 2)

The following time tracking logs were designed to be printed out in hard copy. After selecting a month to complete the time study, it may be best to print out the logs in advance for each of the work days in the month.

You are provided two log options.

### Option 1

This log is structured using set 30 minute periods of time (example: 7:00 – 7:30 am). For each 30 minute interval, you would place a number “1” in the row containing the task that you performed during the 30 minute period. If you performed more than one task during that 30 minute period, you can divide the period between multiple tasks by placing fractions such as .25 or .5 into the approximate roles (as long as the full 30 minutes is accounted for in the column).

At the end of the day, you add the numbers to get the “Total Units.” You then multiple the Total Units by .5

*Example:*

**DAILY TIME TRACKING TOOL (OPTION 1)**

DATE:	7:00	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30	12:00	12:30	1:00	1:30	2:00	2:30	3:00	3:30	4:00	4:30	4:30	TOTAL	TOTAL
TASKS	7:30	8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30	12:00	12:30	1:00	1:30	2:00	2:30	3:00	3:30	4:00	4:30	5:00		UNITS	TIME
<b>CLINICAL</b>																							(HRS)
Assessments	1		0.25																			1.25	0.63
Care Planning		0.5	0.5																			1	0.50
Comm. Resources		0.5																				0.5	0.25
Counseling, Pt/F			0.25																			0.25	0.13
Consulting, Staff																						0	0.00

### Option 2

This log is structured using 15 minute increments. During the day, each time you spend 15 minutes on a particular task you enter a number 1 in the row for that specific task. At the end of the day you then add up each row to obtain the number of “units” and then multiple that number by .25.

*Example:*

**DAILY TIME TRACKING TOOL (Option 2)**

DATE:	15 Minute Units																				UNITS	TIME	
TASKS	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min		(HRS)
<b>CLINICAL</b>																							
Assessments	1	1	1	1	1	1	1	1	1	1												10	2.5
Care Planning	1	1																				2	0.5
Comm. Resources	1	1																				2	0.5
Counseling, Pt/F	1	1	1	1																		4	1
Consulting, Staff																						0	0
Documentation																						0	0



### DAILY TIME TRACKING TOOL (Option 2)

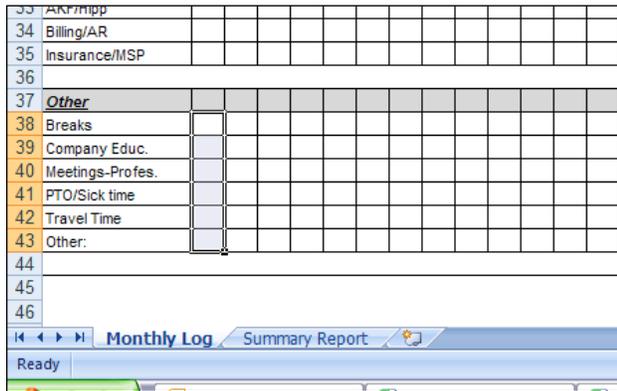
DATE:	15 Minute Units																					UNITS	TIME (HRS)
TASKS	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min	15 min		
<b><u>CLINICAL</u></b>																							
Assessments																							
Care Planning																							
Comm. Resources																							
Counseling, Pt/F																							
Consulting, Staff																							
Documentation																							
DPC																							
Education, Pt/F																							
QAPI																							
QOL Survey																							
Rehabilitation																							
Research/Writing																							
<b><u>ADMIN&amp;CLERICAL</u></b>																							
Admissions																							
Applications																							
Clerical																							
Correspondence																							
HIPAA duties																							
Medication-related																							
Organize/Prepare																							
Satisfaction survey																							
Scheduling-PtS.																							
Supervision																							
Transient Dialysis																							
Transportation																							
<b><u>INSURANCE</u></b>																							
AKF-HIPP																							
Billing/AR																							
Insurance/MSP																							
<b><u>OTHER</u></b>																							
Breaks																							
Company Educ.																							
Meetings-Profes.																							
PTO/Sick time																							
Travel Time																							
<b>TOTAL</b>																							

TOTAL

### III. Monthly Time Tracking Tool & IV. Summary Report

Both the Monthly Time Tracking Tool and Summary Report are located in a separate Excel file.

Once you open the Excel file, you will see two tabs at the bottom of the screen (see image below) – the first tab contains the Monthly Time Tracking Tool and the second tab contains the Summary Report.



You will need to do the following:

- 1) Select the Monthly Log tab.
- 2) Enter the row totals for each task for each day of the month.

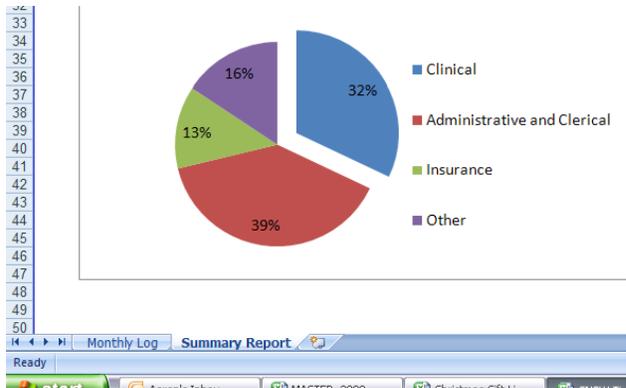
The Excel spreadsheet will automatically calculate the total number of hours spent on each task.

*Example:*

#### MONTHLY TIME TRACKING TOOL

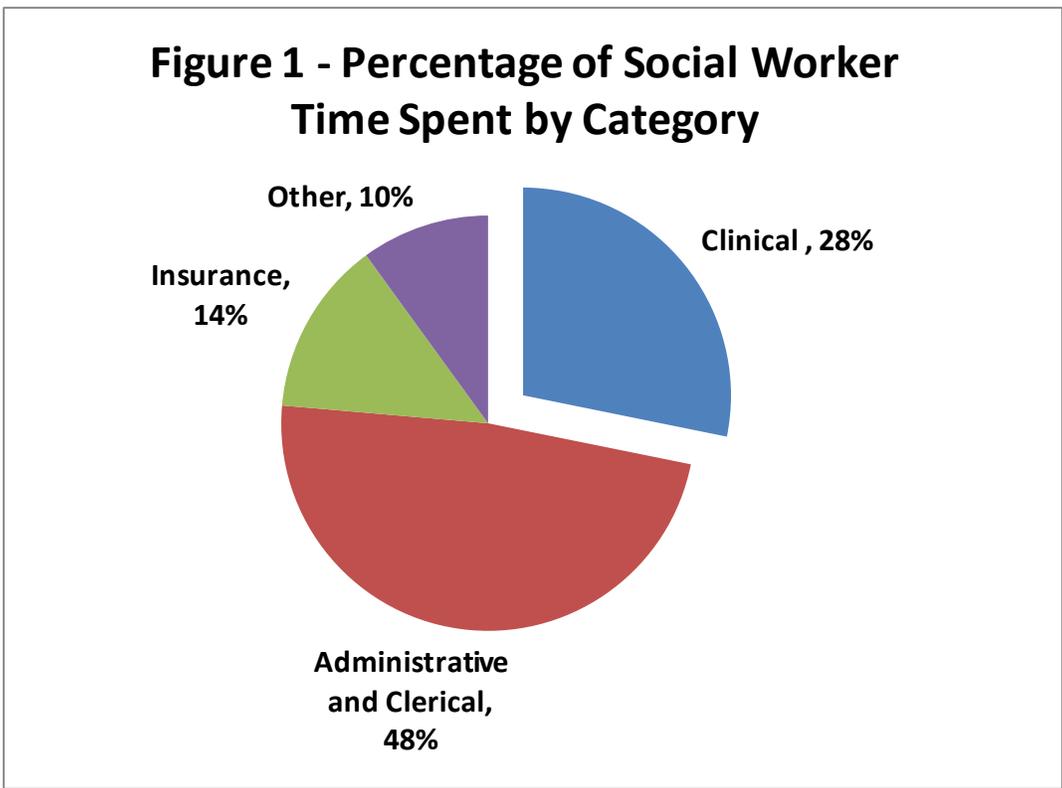
Month:	Hours by Day of the Month																															Total	
TASKS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Total	
<b>CLINICAL</b>																																	
Assessments	3	4																															7.00
Care Planning	2.5																																2.50
Comm. Resources	2.8																																2.75
Counseling, P/VF																																	0.00

Once you have entered all the data for the month into the spreadsheet, you will then select the "Summary Report" tab at the bottom of the screen (see image below).

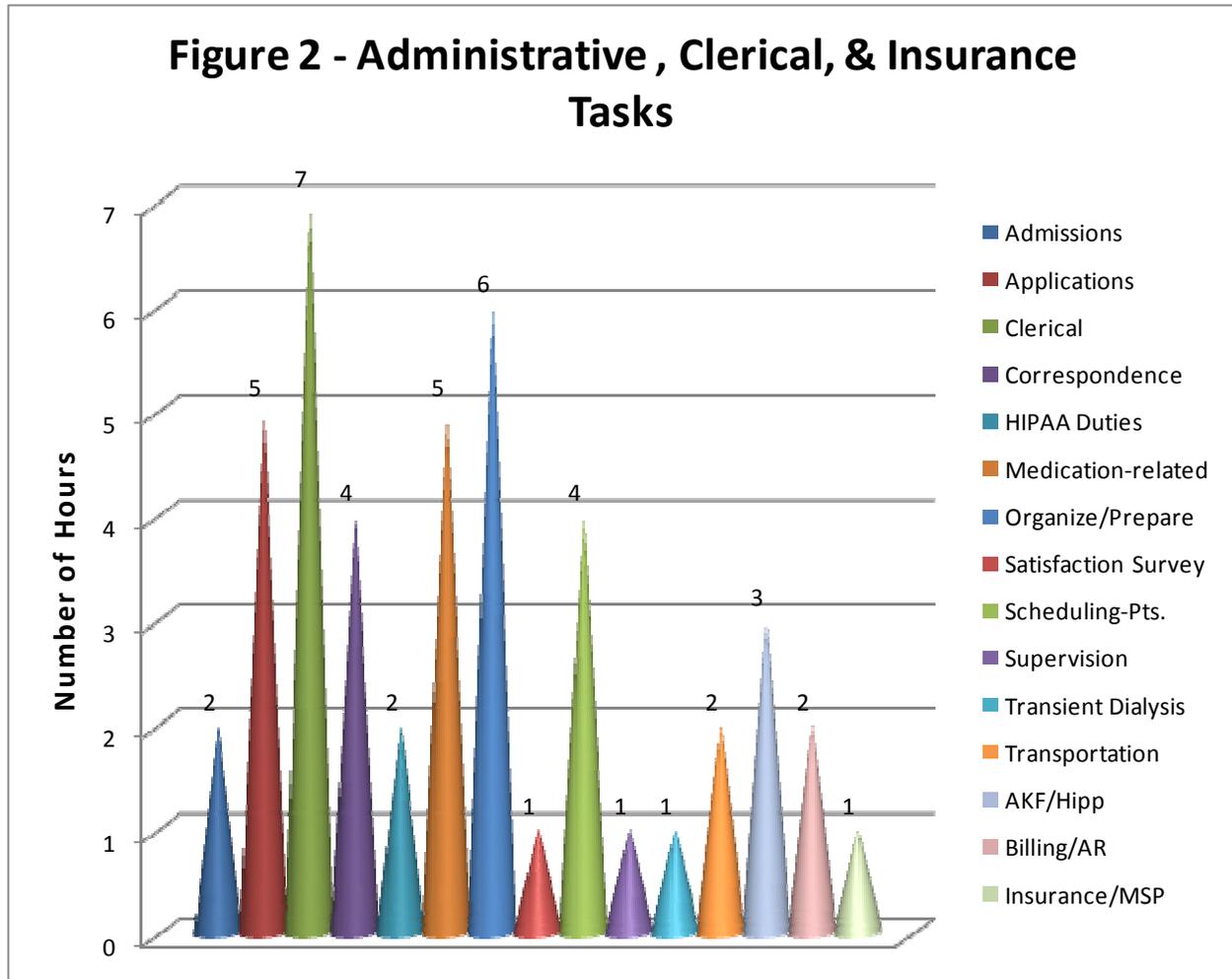


If you have entered your data into the monthly log spreadsheet, you will find on this tab a two page report containing two figures summarizing your data.

*Example:*



Example:



*Please Note:* If printed in black and white, the columns automatically follow the list of tasks, in order from left to right (Admissions being the first column and Insurance being the last column).

Once the report is generated, you may print off the report. The report provides a brief description of its purpose, some brief descriptions of the figures, and a section to write any action plan agreed upon by you and your manager.

*The following page contains an optional hard copy Monthly Time Tracking Tool.*

# MONTHLY TIME TRACKING TOOL

Month: \_\_\_\_\_

Hours by Day of the Month

TASKS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Total	
<b><u>CLINICAL</u></b>																																	
Assessments																																	
Care Planning																																	
Comm. Resources																																	
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Consulting, Staff																																	
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DPC																																	
Education, Pt/F																																	
QAPI																																	
QOL Surveys																																	
Rehabilitation																																	
Research/Writing																																	
<b>Clinical Task Total Hours</b>																																	
<b><u>ADMIN&amp;CLERICAL</u></b>																																	
Admissions																																	
Applications																																	
Clerical																																	
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Supervision																																	
Transient Dialysis																																	
Transportation																																	
<b>Administrative and Clerical Tasks Total Hours</b>																																	
<b><u>INSURANCE</u></b>																																	
AKF/Hipp																																	
Billing/AR																																	
Insurance/MSP																																	
<b>Insurance Task Total Hours</b>																																	
<b><u>Other</u></b>																																	
Breaks																																	
Company Educ.																																	
Meetings-Profes.																																	
PTO/Sick time																																	
Travel Time																																	
Other:																																	
<b>Other Task Hours</b>																																	
<b>Grand Total Number of Hours:</b>																																	