

**DEPARTMENT OF DEVELOPMENTAL SERVICES INSTRUCTIONS FOR THE CASE  
MANAGEMENT TIME STUDY (DS 1916)  
SEPTEMBER 2025**

**GENERAL INSTRUCTIONS**

1. Enter name of employee as follows: Last, First, Middle.
2. Check the appropriate box of the employee's TCM Classification.
3. Box 3, (Month/Year) is already populated (September 2025).
4. Check the appropriate box of the employee's job classification.
5. Check the appropriate box of the employee's job status during the time study, i.e., full-time, part-time. (If part-time then show percentage of normal work month.)
6. Enter the regional center name.

**SPECIAL INSTRUCTIONS**

1. Hours may be rounded to the nearest quarter hour. For example: six hours, eleven minutes could be rounded to six hours, fifteen minutes, or 6.25 on the time sheet.
2. Time spent on breaks, except lunch, is to be charged to the last function worked.
3. The total hours worked during the day, including overtime, must be shown.

**SIGNATURES (NEW INSTRUCTIONS)**

1. Use the provided Excel time sheet with employee **and** supervisor signatures.
2. Send time sheets as Excel documents, not PDFs.

**TIME SHEET DEFINITIONS**

A. Examples of Allowable Services

1. Providing information to a specific individual on available programs/services, referrals to such services, and advice regarding the utilization of such services.
2. Assessment of individuals' functioning levels, needs, and progress.
3. Reviews of assessments done by other professionals and consultation with other professionals.
4. Development, revision, and monitoring of Individual Program Plan, including arrangements for services, pre-placement visits, et cetera.
5. Periodic/annual reviews of individuals' progress and needs.
6. Consultation with service providers regarding individuals' progress/needs.
7. Assessment of the care, training, and the services provided to individuals.
8. Individual-specific services which eliminate barriers to gaining access to services, including seeking conservatorships, and assisting in obtaining services from other agencies.
9. Consultation with supervisor regarding specific individuals.
10. All travel associated with the above-described activities.

B. Examples of Unallowable Services

1. Case finding and outreach services.
2. Intake services prior to the determination that the individual is eligible for regional center services.
3. All services provided to individuals who have not been determined to be eligible for regional center services.
4. Public education and regional center information services which are not active individual-specific.
5. Union activities during work time.
6. Services which are already covered by the Medi-Cal program (e.g., physician and psychology services).
7. Services provided as a result of case management.
8. Time spent performing Social Security representative payee activities.
9. Travel associated with the above-described Unallowable Services.

C. Examples of Other Services

1. Regional center staff meetings.
2. Conferences with supervisor on other than individual-specific issues, i.e., regional center policies, job performance, et cetera.
3. In-service and out-service training.
4. Facility liaison activities.
5. Resource development.
6. Evaluation of service providers' programs.
7. Development of policies and procedures for the regional center.
8. Development, revision, and negotiation of interagency agreements.
9. Review and analysis of referral packets received from the other regional centers or developmental centers.
10. Time spent on shared-out cases.
11. Time spent performing administrative, management, or supervisory duties.
12. Management of trust accounts.
13. Travel associated with the above-described other services, including time spent traveling to meet with an individual who fails to keep an appointment.

D. Examples of Time Off

The following activities are to be listed under Time Off:

- |               |                            |                   |
|---------------|----------------------------|-------------------|
| 1. Sick Leave | 2. Vacation                | 3. Holidays       |
| 4. Jury Duty  | 5. Administrative Time Off | 6. Military Leave |

Hours may be rounded to the nearest quarter hour.