TRAC-IT Required Fields Webinar
Contact Notes
Q & A
11/29/23 at 2:00pm

In this document, the questions asked during the webinar are listed. Related questions are grouped together.

General Questions

Q: Is this contact note - IFSP - for therapist or SCs?

Q: The contact note for eligibility determination shows the professional as service coordinator. I thought the professional had to be listed as Educator.

A: For event notes, the note task assigned to the service coordinator in the case will have Service Coordination activities as an option in the note. Note tasks assigned to clinicians who attended the IFSP will have Service activities available in the note. If a service coordinator serves as both the service coordinator and clinician, they can complete the event note auto-generated by TRAC-IT as the service coordinator and an ad hoc note using their clinical discipline. This should be done if the two activities (service coordination and service) should be logged and appear on the billing extracts separately.

Q: Can a contact note be created for a missed visit or is there a place to document a missed visit?

A: In the Contact Note task, you can indicate if a visit was missed by selecting one of the cancelation outcome buttons. You will be required to enter a note in the Communication Log Detail field and a Communication Log is added to the child's record. You can also create a Communication Log independent of the Contact Note task by navigating to the bottom of the case page until you see the menu on the left-hand side of the screen. You can click on Communication Log and click Create +.

Q: Is there a limit on notes that can be entered?

A: There are no limits on the number of notes that can be entered.

Q: I noticed the note you entered passed the 3-day timeline. Will TRAC-It allow to enter "late" notes?

A: TRAC-IT will allow you to enter notes that are in the past. There is not a timeframe in which notes can be entered.

Q: If the service is provided after the 30-day timeline, will it be an option to select the reason?

A: A timeliness task is created if the date of service entered in the services Contact Note task is the first date of service and that date is beyond 30 days of the date the parent signed the IFSP. The reason selected in the timeliness task is added to the service line.

Q: Does the due date only apply to first service note?

A: The Due Date field in the Contact Note task is based on either:

1. the date you enter as the next visit date in the Contact Note task, OR
2. 30 days from the date the service is added to the IFSP, if it is a new service

It is a suggested date and is not stored in the child's record.

Q: How will TRAC IT know what CPT code to use? Is there a prepopulated list for the provider to select?

A: TRAC-IT is using CPT mapping provided by DBHDS. The mapping considers many factors, including the type of insurance, reimbursement category of the clinician, service type, and the intensity of the service. Since there are so many parameters, there is not a drop-down menu from which providers can select.

Q: Are the ICD-9 codes prepopulating? Are the ICD Codes Pediatrician provided?

A: ICD codes can be added to the contact notes once the ICD code is added to the child's record through the Manage ICD-10 Code ad hoc task.

Q: Are ICD-10 codes required in TRAC-IT?

A: ICD-10 codes are not required in TRAC-IT.

Q: How can the provider "reconcile" if all notes of the month were entered?

Q: Is there a place where SCs can look at their required monthly or quarterly contact note for all caseload instead of looking at one by one?

Q: Is there a reconciliation report for all your kids versus looking at each one individually?

Q: Is there a way for a SC to see in one place how many contacts they have completed for a specific month.

Q: Is there a report to check reconciliation of services for each child?

A: A provider can look at the completed Contact Notes in the menu on the bottom left-hand side of the case page and sort the notes in the list. Users with access to the Billing Extract can sort the service logs by clinician and confirm all notes are added by sharing this information with providers. An enhancement request is logged as well to ask for a way for providers to see all their notes in one place.

Q: Will there be a report to combine notes from a specific date range into a single document instead of having to open them individually? For example we often use this report in our electronic health record when training new staff or orienting to a newly assigned SC

A: There is an enhancement the larger project team is working on to create a print template which would include all the completed contact notes.

Q: When an initial therapy session is determined, will the service coordinator start that note or will the therapist need to go in and start it?

A: Contact Note tasks are created when the Assign Service or Reassign Services tasks are completed. In general, this task is completed by the service coordinator. If you do not see a TRAC-IT generated note, you can always use an ad hoc note until the service is assigned to you.

Q: Does each system decide if an event contact note is needed?

A: Event Contact Notes are not required by TRAC-IT, but you should enter all clinically required information based on the guidance provided in the Practice Manual.

Q: When would you check contact note "not needed"?

A: You can select Contact Note Not Needed in a variety of situations:

1. If you did not attend the event even though you were added as an attendee
2. If you already entered a note through an ad hoc Contact Note task
3. If you do not need to enter a billable activity for an event, even though you attended

When you select not needed and complete the task, this completes the task. You will need to create an ad hoc note if you need to enter a note for the event at a later time.

For services Contact Notes, selecting Contact Note Not Needed will end the creation of the note tasks. You would select this if you have duplicate service notes or are ending the service. Clicking Not Needed in a service Contact Note will not end the service on the IFSP.

Q: What type of contact notes are service coordinators going to be using most often?

A: Service coordinators will use the Service Coordination Contact Note tasks most frequently.

Q: If a service coordinator facilitated a Review (for example), does the SC also need to do a contact note that documents the Review?

A: Contact Note tasks are the only way to enter billable activities that will extract onto the billing extracts. So, if you are wanting to document the IFSP Review as a billable activity, you should complete a Contact Note task.

Q: If you don't put a next date of service, will it populate the next session note task?

A: A new Contact Note for that service will generate for that provider with no scheduled date.

Q: Is there a timeframe for how long you can make revisions?

A: Contact notes can be revised at any time.

Q: Can you show how to document a cancellation? Or communications with the family?

Q: What would the provider do if there is a cancellation?

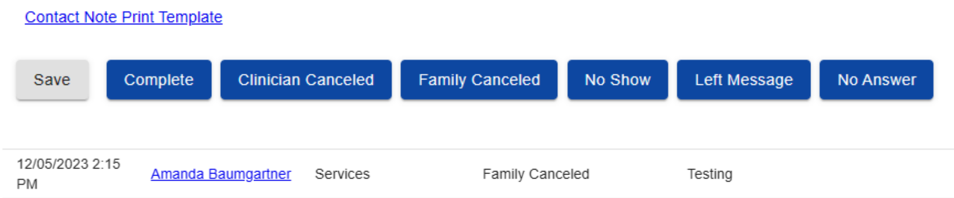
Q: As a service provider, don't we always need a note for sessions, meetings, cancellations, etc.?

Q: Can you show how to enter a cancellation note? Or are these not required? This is with the goal to reconcile the notes required for the month.

A: TRAC-IT does not know whether a contact note is required. Service providers are expected to complete contact notes and/or communication logs to meet all documentation requirements specified in the Practice Manual.

Selecting the appropriate outcome button other than “Complete” will generate a Communication Log

Questions??
Contact Support at
804-508-7229
VATRACITsupport@ssg-llc.com



Q: So we can use one contact note to record a treatment session as 1 service type and IFSP review as 2nd service type performed on the same day?

A: You can enter two service activities on the same Contact Note task, provided the discipline listed would apply to both activities. You would use the plus button next to the service activity fields to add new service activity fields.

If the same discipline does not apply to the service activity, then you would need to use two Contact Note tasks to record the activity.

Q: Could you show an example of a note we would use for indirect activity to account for productivity time?

A: You would use the Service Coordination Contact Note task to record activities you would like extracted to the Productivity Extract. If the activity is not billable, be sure to check Not Billable in the task.

Q: Is there any capability to edits notes once they are completed if quality revisions are needed?

A: You can edit notes at any time by scrolling to the Contact Notes tab on the bottom left-hand side of the case page. Click on the note you would like to edit and the note will appear in the pop-up window. Click EDIT and all the fields are editable. Be sure to click SAVE once you are done making updates and a revision log will be made in the Revisions tab in the note.

Q: Is anyone added to the plan able to read all notes? Sometime the Service Coordinator is involved in activity (financial, Child Protective Services, court testimony, etc.) that the therapist should not be privy to

A: Any provider who has access to the enrollment will have access to the notes.

Q: For individuals open with longevity they simply have a lengthy communication log, task summary etc.? Or will these go in to an IFSP date range?

A: The communication logs, task summary, and any other tab in which there are multiple entries will have many entries over time. You can sort the entries by hovering on the column header and clicking to sort by date or alphabetical order, depending on the column.

Q: If the information has been entered in the IFSP task, Intake Task or assessment task, why is a contact note task also required?

A: The information entered in the IFSP, Intake, or assessment tasks is stored in the actual event into TRAC-IT and creates the IFSP, intake or assessment. If you would like to record any billing information or clinical notes, the Contact Note tasks are the only way to record this information. The information entered into the Contact Notes tasks is extracted into the Billing Extracts.

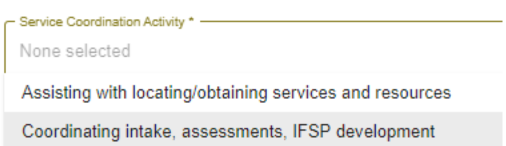
Q: What is the difference between the Contact Note and the Communication Log. And do we need both?

A: Contact Note tasks are the only way to record clinical notes or billing information related to an event or service. The information entered into the Contact Notes tasks is extracted into the Billing Extracts.

Communication logs serve as a log of any communication that is not billable and is not able to be recorded as a non-billable service coordination activity. Logs are not extracted to any report but are useful if you want to record voice mails or attempts to contact the family.

Q: What "Service Coordination Activity" was meant to be used for IFSP Reviews? There is not one specifically for reviews, so which should we use?

A: You can use the following highlighted activity:



Q: Just want to clarify again, if we are not using TRAC-IT for extracts/billing and are maintaining another complete EHR, we still must enter all 4 types of contact notes into TRAC-IT as well?

A: At a minimum, the contact notes in TRAC-IT should be sufficient to determine that events were completed as required and that services were delivered in accordance with the IFSP. In the situation described here, other communication notes may be maintained in the local EHR and are not required in TRAC-IT.

Q: For location, if we are doing something (like Intake, IFSP, ASP) at the office, what location do we use?

A: The guidance discussed in the webinar is to use Other Setting as the location.

Q: There have been times when an event note isn't assigned to me until close to timeliness deadline...in these situations, do you wait and potentially be late or do you proceed with a regular service contact note and specify that it is for an event?

A: The Contact Note tasks are similar, except for the Service Coordination Contact Notes. If you do not have an event Contact Note task, you can create an ad hoc Contact Note to enter your notes and billing information for the event. Then, you would select Contact Note Not Needed when the event note was generated since you have already entered the note.

Q: How do the required fields for s/c note different for a therapist?

A: The required fields for a Contact Note are:

- ✓ **Date of Service**
- ✓ **Location**
- ✓ **Clinician**
- ✓ **Discipline**
- ✓ **Service Type**
- ✓ **Start Time**
- ✓ **Minutes**

The required fields for a Service Coordination Contact Note are:

- ✓ Service Coordination Activity
- ✓ Start Time
- ✓ Minutes
- ✓ Date of Service Provided
- ✓ Location
- ✓ Clinician
- ✓ Professional Discipline
- ✓ Method

Q: What are the 4 types of contact notes: event, services, Service Coordination, and what is the fourth?

A: The four types of contact note tasks are:

1. Contact Note tasks for events
2. Contact Note tasks for services
3. Service Coordination Contact Notes
4. Ad Hoc Contact Notes

Q: What is the difference between data in these 2 fields: professional discipline & service type?

A: In a note, the professional discipline is the discipline that is set by TRAC-IT based on your credentials. The Service Type is the type of service you are providing to the child.