TRAC-IT Required Fields Webinar
Referral, Intake, Insurance tasks
Q & A
11/14/23, 2pm

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

General Questions

Q: If you forget to enter IFSP attendees OR the team changes between scheduling and completing- are you able to change the team so that the provider can still enter contact notes?

A: There will be an option to add or update the attendees before completing the IFSP tasks. Thus, if the team changes between scheduling and completing the IFSP, the new attendees can be added.

Q: Are you completing these tasks in the order of how they should happen in live time? If so- I am wondering how the hearing and vision can be done prior to intake without this information having been collected.

A: The order of task completion during the trainings is based on the availability of the tasks and the amount of material needed to cover in the task. Since the Vision and Hearing Screening tasks have only one required field, these were completed before the Intake task in the training. You should always complete tasks in the order that is clinically appropriate.

Q: I noticed that the change in attendees did not generate a note for the new person added or take off the old attendee.

A: If the Contact Note tasks are generated before the change in attendee is logged in TRAC-IT (for example, if the ASP attendees are selected in the Schedule ASP task and then changed in the IFSP task), a new task is not generated for the new attendee. The new attendee can claim the existing Contact Note task and change the clinician in the task to themselves. The information in the Contact Note task will be stored in the child's record as it is entered.

Q: Could you please provide a link to the sandbox?

A: The link to the Sandbox is: https://training.vaei.casetivity.com/

Q: IS THERE A WAY FOR A SERVICE COORDINATOR TO SEE WHAT TASKS SHE HAS "SAVED" VERSUS COMPLETED

A: Users are able to see their open tasks in the My Tasks tile in the User dashboard. This tile will list the task

Q: HOW DO I ACCESS THE SERVICE COORDINATORS BILLINGS FOR A MONTH

A: Users with the EI Biller or Program Director role can access the billing extract through the Reporting menu in the navigation bar.

REFERRAL QUESTIONS

Q: WHERE DO YOU PUT THE SYSTEM YOU ARE REFERRING TO WHEN TRANSFERRING TO ANOTHER SYSTEM?

A: When you are referring to another local system, you should indicate you are transferring the child in the most appropriate place. This could be a Contact Note task, a Communication Log, or using the appropriate discharge reason. When transferring, there are a couple steps:

1. Close your open enrollment making sure all the information is added correctly and information is not missing
2. You or the new provider can create the new referral. When creating the new referral, be sure to enter the child's name and date of birth correctly or TRAC-IT will not automatically link the two cases.

Q: HOW ABOUT REFERRALS TO OTHER PART C SYSTEMS

A: When a referral is made from another Part C system, the Review Referral task is generated. This task has all the same required fields as the Referral task.

INSURANCE QUESTIONS

Q: IF THE FAMILY HAS PRIVATE INSURANCE, WANTS TO BILL INSURANCE AND WANTS TO ESTABLISH A MONTHLY CAP/FAMILY DISCOUNTED FEE, HOW DO YOU ENTER THAT INFORMATION IN TRAC-IT? CAN YOU SHOW THAT ON THE SCREEN TO MAKE SURE WE ARE DOING THAT CORRECTLY?

A: In TRAC-IT, you will use the Family Cost Share Agreement task to enter the information by selecting the appropriate boxes related to the family's billing preferences.

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

Intake Questions

Q: When communicating prior to intake, do you put that in the communication log?

A: You can record communications prior to intake in either the Communication Log or in a Contact Note. The Service Coordinator Contact Note task has a box that you can check for non-billable activities.

Q: Is the SC contact note an ad hoc task that can be added prior to the intake completion

A: Yes, the Service Coordination Contact Note task is available prior to completing the Intake task.