Welcome!

The session will begin shortly

SSG

TRAC-IT

Welcome!

- Insurance Record Accuracy
- IFSP
  - Entry of IFSP
  - Common Questions

TRAC-IT

Insurance Record Accuracy

Why does accurate insurance information matter?

1. *If child is re-enrolled, insurance information can be carried to the next referral*

2. *New Fiscal enhancements being built with the assumption insurance information is correct – new extracts, insurance validations, and reports will be available in the fall*

Updating Insurance Information

Updating record WITHOUT the Insurance Role:

1. Create the task "Update Insurance Information"
2. Enter the correct insurance information
3. Complete the task.
4. An Insurance Confirmation task will be created for your Insurance personnel to complete.

Updating an insurance line directly WITH the Insurance Role:

1. Open the child's case page and scroll to the bottom of the page
2. Click the tab on the left-hand side labeled "Insurance"
3. Click on the row of the insurance you wish to edit
4. Click Edit in the top left corner
5. Edit the record and click Save.

IFSP tasks

There are 3 types of IFSP tasks:

- **Initial IFSP Meeting**

- **IFSP Review**

- **Annual IFSP**

IMPORTANT – ONCE IFSP TASKS ARE COMPLETED, SUPPORT DESK IS NOT ABLE TO MAKE CHANGES OR EDITS

Initial IFSP Meeting task

Intention: Task to be used when entering initial IFSP

- Tasks that must be completed before IFSP can be COMPLETED:

IFSP information can be added and saved, but the task cannot be 'COMPLETED' until the following are complete: Intake, Eligibility Determination, Schedule ASP, Notice and Consent of ASP, Hearing Screening, Vision Screening, Family Cost Share Agreement and Prior Notice - Eligible / IFSP Needed, Insurance/PCP Information, Insurance Confirmation

- Information from Intake Visit and Hearing & Vision Screening tasks populated into IFSP

- Once task is completed, edits to task not allowed

- Completion of task generates IFSP print template

IFSP Review task

Intention: To document IFSP Reviews; can also be used to edit services and outcomes if entered incorrectly in initial IFSP or Annual IFSP tasks
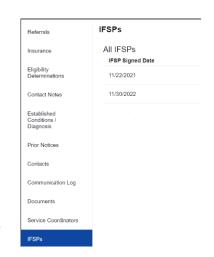
- Scheduling Review can happen anytime AFTER initial IFSP task completed through ad hoc task menu

- Ability to update, edit, or end date services and outcomes in IFSP

- Once task is completed, edits to task not allowed

- Completion of task generates IFSP Review print template

Annual IFSP task

> ***Intention: To enter the Annual IFSP; can also be used to edit text entered in the Initial IFSP task***

- Scheduling Annual can happen anytime AFTER initial IFSP task completed through ad hoc task menu

- Ability to update, edit, and/or end date services, outcomes and edit text in IFSP

- Once task is completed, edits to task not allowed

- Completion of task generates IFSP print template

IFSP's in TRAC-IT are iterative in nature – this means that they build upon each other. History of IFSPs are located here:

IFSP Print Templates

TWO Print Templates:

Document created when IFSP tasks are COMPLETED:

- Stored in the Documents section

- Contains information from the task from this moment in time

- If corrections are needed, this print template WILL not reflect corrections

- Corrections will appear in the new print template created by the new IFSP task

Referrals

Insurance

Eligibility Determinations

Contact Notes

Established Conditions / Diagnosis

Prior Notices

Contacts

Communication Log

Documents

Documents

Document

Document ↑

IFSP Addendum signed on 04/04/2023.docx

IFSP Review signed on 04/04/2023.docx

IFSP Review signed on 08/04/2022.docx

IFSP signed on 11/30/2022.docx

IFSP Print Templates
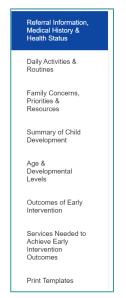
TWO Print Templates:

Current IFSP print template:

- Created on request

- Contains current information on active IFSP

- Includes changes to services and outcomes made in IFSP Reviews

- DOES NOT include Transition and Signature pages

1. Click on View IFSP:

Enrollment:

TRAC-IT ID

Child

Intake
Intake Visit on 11/03/2021

Enrollment Status
Services

Local System
ITC Hampton-Ne

Click to View IFSP
IFSP

2. Click on Print Templates:

Referral Information, Medical History & Health Status

Daily Activities & Routines

Family Concerns, Priorities & Resources

Summary of Child Development

Age & Developmental Levels

Outcomes of Early Intervention

Services Needed to Achieve Early Intervention Outcomes

Print Templates

3. Click on IFSP Print Template:

Print Templates

Print templates will be available on Online mode

IFSP Print Template

Common Questions

I completed the IFSP task but forgot to add a service – what can I do to add the service?

Once the IFSP tasks are completed, edits are not able to made by you OR Support Desk.

To edit the services or outcomes:

1. Create the IFSP Review task

2. Use the same date as the date of the IFSP you are updating

3. Make updates to services or outcomes
4. Complete the task

Remember – the tasks are just how information is entered into TRAC-IT and are not the record. So, by using the same date, you are updating the existing IFSP.

Common Questions

I finished the Annual IFSP and forgot to add some information – what should I do?

Once the IFSP tasks are completed, edits are not able to made by you OR Support Desk.

To edit text in IFSP:

1. Create the Annual IFSP task

2. Use the same date as the date of the IFSP you are updating

3. Make updates to services or outcomes

4. Complete the task

Remember – the tasks are just how information is entered into TRAC-IT and are not the record. So, by using the same date, you are updating the existing IFSP.

Common Questions

I entered information in the Initial IFSP Meeting task and after I completed the Intake Visit task, it is gone. What happened?

This can happen when information is entered in this order:

1. The Initial IFSP Meeting and Intake tasks are open at the same time

2. Information is entered in the Initial IFSP task in the same fields the Intake Visit task will populate

3. Initial IFSP task is SAVED

4. Intake Visit task is completed WITHOUT information in the fields

5. Saved information in IFSP task is overwritten by blank fields

To AVOID this – enter information directly in the Intake Visit task vs the IFSP

❖ *TRAC-IT is expecting the Intake Visit to be completed before the IFSP task*

❖ *Information from Intake Visit will populate into IFSP task and is available for editing*

❖ *If these fields are left blank, the Intake Visit print template will not have any information*

Common Questions

I created an IFSP Review task vs an Annual IFSP task – what should I do?

When you create the IFSP Review or Annual IFSP, TRAC-IT generates a version of the IFSP for you to edit.

If you create the task in error, contact the Support Desk – we need to remove the temporary version of the IFSP for you.

Upcoming Updates

Planned Updates to IFSP:

❑ Additional required fields in December

❑ Ability to easily reschedule IFSP meetings

❑ Save complete IFSP print template when an IFSP Review is completed

When to Contact the Support Desk

ANY TIME YOU ARE UNSURE – SAVE THE TASK AND WE CAN TAKE A LOOK WITH YOU

Open Floor