



Welcome!

The session will begin shortly



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- Introduction
- Re-enrollment Logic



Re-Enrollment Logic in TRAC-IT

TRAC-IT copies information from previous enrollment if:

- Intake is completed in previous enrollment AND
- Child was eligible in previous enrollment AND
- Discharge date is less than 6 months before the new referral date

Information copied:

- First Referral Date
- Intake Information
- Eligibility Through Date (Eligibility Determination)
- IFSP/Service Plan

Reminder – The re-enrollment logic is triggered twice – once after the Referral task is completed and again after the intake task is completed.

Common Error #1

Referral Date entered in the re-referral is equal to or before the Discharge Date in the previous case.

If previous case is discharged, a new referral case will be created and the re-enrollment logic WILL NOT be triggered. The next opportunity for the re-enrollment logic to be triggered is when the Intake task is completed.

SOLUTION:

1. Contact the Support Desk to update the referral date to be after the previous discharge date.
2. Complete the Schedule Appointments and Assign Service Coordinator task.
3. Complete the Intake task with minimal information. The re-enrollment logic will be triggered and TRAC-IT will carry forward all the information from the previous case.

Common Error #2

The Referral task is completed BEFORE the child is discharged from the previous local system.

If previous case is still open, TRAC-IT will accept the referral but create the Child Record Open task. Once this task is completed, the next opportunity for the re-enrollment logic to be triggered is when the Intake task is completed.

SOLUTION:

1. Be sure the referral date entered is AFTER the discharge date entered by the previous local system. If the date needs to be updated, contact the Support Desk.
2. Complete the Schedule Appointments and Assign Service Coordinator task.
3. Complete the Intake task with minimal information. The re-enrollment logic will be triggered and TRAC-IT will carry forward all the information from the previous case.

Common Error #3

The Referral task is completed with the correct dates, but the name and/or date of birth of the child is not an exact match.

If the child's name and date of birth are not exactly the same in the referral, TRAC-IT will create the Review Possible Duplicate Child task. It is important to resolve the possible matches as soon as possible.

SOLUTION:

1. Be sure the referral date entered is AFTER the discharge date entered by the previous local system.
2. Complete the Review Possible Duplicate Child task – resolving the matches.
3. Complete the Schedule Appointments and Assign Service Coordinator task.
4. Complete the Intake task with minimal information. The re-enrollment logic will be triggered and TRAC-IT will carry forward all the information from the previous case.

Common Questions from the Support Desk

Q: I have additional information to add to the child's intake but do not have the task due to the re-enrollment. What should I do?

A: You can use all the ad hoc tasks to make any corrections to the child's record.

Q: I received incorrect information in the referral and need to re-enroll the child. How can I do this?

A: You can use the Update Child/Guardian task to update the child's information to match the previous case. Once you complete the Intake task, the re-enrollment logic will be triggered.

Common Questions from the Support Desk

Q: I received a completely new TRAC-IT ID for this child and it should be a second referral. Can you help?

A: This is one of the more complicated issues – once a TRAC-IT ID is created, it cannot be edited. There are two options:

-Update the child's name and date of birth to match the previous case. Once updated, the two cases will link. Then, you complete the Intake task to trigger the re-enrollment logic.

OR

-The Support Desk can remove the referral completely and you can re-enter the information, being sure the name and date of birth match. You would also need to be sure the referral date is AFTER the discharge date.

When to Contact the Support Desk

- If you are unsure what the discharge date is from the previous local system's case.
- If you need the referral date to be updated to be AFTER the discharge date.
- You have progressed past the Intake task and TRAC-IT's re-enrollment logic has not been triggered.

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



Open Floor