

# Welcome!

The session will begin  
shortly

A graphic of six white footprints arranged in an upward-sloping path from the bottom left towards the top right, appearing to lead towards the text.

# TRAC-IT

# Welcome!

- Review Contact Notes
  - Types of Notes
  - Common Questions
- How to Transfer a Child



# Contact Notes

There are 2 types of Contact Notes:

- TRAC-IT Generated Notes
  - Event Notes
  - Service-related Notes
- Ad Hoc Notes
  - Service Coordinator Notes
  - General Contact Notes

**IMPORTANT – ALL COMPLETED NOTES, TRAC-IT GENERATED OR AD HOC, ARE EXTRACTED TO THE BILLING EXTRACT**



# TRAC-IT Generated Notes

## Event Notes:

- Created for all listed attendees when tasks are completed
- Events include Intake, ASP, IFSP, Annual IFSP, IFSP Review, Transition Plan, TPC \*
- Required Fields include *(note – additional fields will be required after 12/11/23)*:
  - Date of service provided
  - Clinician
  - Professional discipline
  - Service type
  - Start time
- Can select Contact Note Not Needed – if selected, this note WILL NOT be extracted to billing extract

**\*A Contact Note for Eligibility Determination is no longer created unless specifically scheduled**

# TRAC-IT Generated Notes

## Service-Related Notes:

- Created for clinician assigned to the service when Assign IFSP Services or Reassign IFSP Services task is completed
- Required Fields include *(note – additional fields will be required after 12/11/23)*:
  - Date of service provided
  - Service Length
  - Clinician
  - Professional discipline
  - Service type
  - Start time
- ❖ Can link goals from the IFSP to your Contact Note
- ❖ Can schedule next visit – if enter next visit time, TRAC-IT will automatically generate the next note

**Contact Note Not Needed & Final Visit Check Boxes = NOTE IS DISCONTINUED**

# TRAC-IT Ad Hoc Notes

## Ad Hoc Notes:

- Created when you create Add Contact Note task from the Ad Hoc task list
- Can be used for events or services
- General intention of this note is to document billable activity that occurs outside of the routine workflow
  - You are serving a dual role at an event (service coordinator AND clinician & need to document BOTH billable activities)
  - You attended an event but were not added as an attendee in the task
- Ad Hoc Contact Notes stored in the child's record in the same place as TRAC-IT generated notes
- Ad Hoc Contact Notes ARE extracted to the Billing Extract
- ❖ Limitations of Ad Hoc Contact Notes:
  - You cannot schedule the next visit
  - You cannot discontinue service-related notes

# TRAC-IT Ad Hoc Notes

## Service Coordination Ad Hoc Notes:

- Available to assigned Service Coordinator in case
- Created by selecting Service Coordination Contact Note from the Ad Hoc task drop down menu
- Should be used for service coordination activities – activity drop down list is specific to service coordination activities ONLY
- General intention of this note is to document billable activity – if you have non-billable activity, you can use a Communication Log *at this time*
- Ad Hoc Service Coordination Contact Notes stored in the child's record in the same place as all other notes
- Ad Hoc Service Coordination Contact Notes ARE extracted to the Billing Extract

# Common Questions

*I am serving in a dual role at the IFSP – as a Service Coordinator and as a clinician. How do I document both billable activities?*

To document your **service coordination activities**:

- Complete the Contact Note – IFSP task: TRAC-IT will provide the service coordination activities in the services drop-down menu in the task

To document your **clinical activities**:

- Create an Ad Hoc Contact Note

RESULT:

2 notes will be added to the child's record documenting the two services you provided.

2 billable activities will be extracted to the Billing Extract



# Common Questions

*I discontinued my Contact Note by mistake – how can I restart TRAC-IT's contact note tasks?*

To restart the Contact Note that was discontinued:

1. Open the child's record and create an ad hoc "Reassign IFSP Services" task.
2. Complete this task WITHOUT a clinician in the service line.
3. Open another "Reassign IFSP Services" task
4. Add the clinician's name to the service line and complete the task.

TRAC-IT recognizes the change in the assignee and will regenerate the note.

# Common Questions

*The due date on the Contact Note task is in the past – how do I update the date?*

**You do not need to update the Due Date**

The due date is a suggested date by TRAC-IT and IS NOT STORED in the child's record.

Enter the correct date of service into the note - the date of service IS STORED in the child's record.

***If you enter the date of service and SAVE the task, the due date of the task will be updated***

# Common Questions

*I completed the Contact Note task, but need to make updates or remove the note completely.*

- Open the Child's record and scroll all the way to the bottom of the page, until you see the menu on the left-hand side of the screen
- Click on "Contact Notes"
- Select the Contact Note you would like to edit and click on the row or the blue arrow on the right-hand side of the screen
- Click "Edit" - the fields you are able to edit will be highlighted in gray.
- Make your change and click "Save", or choose "Delete" in the top left corner if you wish to delete the note.

# Common Questions

*I discharged a child and need to add Contact Notes.*

- Open the Child's record and scroll all the way to the bottom of the page, until you see the menu on the left-hand side of the screen
- Click on "Contact Notes"
- Click "Create +" at the bottom of the list of notes
- Add the visit time, information, and notes
- Click "Save" when you are done. This will create a contact note in the child's record.

# Common Questions

*How does TRAC-IT perform the 30-day timeliness check?*

Dates and parameters factored into timeliness check:

- **Start date** of Service Line
- **First date of service** on completed Contact Note for that service (Contact Note must be completed AFTER IFSP is completed)
- **Service type** selected in completed note MUST be the same as the service type in the service line (i.e., if Developmental Services/Assistive Technology is selected in the note, but Developmental Services is the service type in the IFSP, the completed note WILL NOT be recognized by TRAC-IT when checking the timeliness of Developmental Services provided)

Questions regarding timeliness? Contact Support Desk

# Upcoming Updates

## *Planned Updates to Contact Notes:*

- ❑ Additional required fields for enhancements to the billing extracts
- ❑ Ability to mark Service Coordination Contact Note as not billable vs billable
- ❑ Service Coordination Extracts – will extract Service Coordination Contact Notes into 2 new extracts – one documenting billable activity and one documenting billable and non-billable activity

# When to Contact the Support Desk

- If you have questions related to the timeliness of service
- If you enter a Contact Note in the wrong case – the Support Desk is allowed to remove the completed task in this situation

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

# Transferring A Child

*Three steps:*

- 1. Enter all information into the open case before discharging – most importantly, IFSP information**
- 2. Discharge the child**
- 3. Create the referral for the new local system OR contact the local system outside of TRAC-IT. The new local system will create the referral.**



# Transferring A Child

## *Best Practices/Tips*

- 1. Be sure the information is current BEFORE discharging the child*
- 2. Always discharge the child BEFORE entering a new referral*
- 3. To trigger TRAC-IT's re-enrollment logic:*
  - ✓ Be sure the name and date of birth of the child MATCH EXACTLY (i.e., if John is the first name and Jay-Smith is the last name, DO NOT ENTER JAY AS THE MIDDLE NAME)*
  - ✓ Be sure the referral date is AFTER the discharge date*

# When to Contact the Support Desk

- If you have questions related to any missing information
- If you receive a transfer and the re-enrollment logic was not triggered
- If you are unsure of the discharge date from the previous local system

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



# Open Floor