Contact Note Enhancements

Question & Answer
Training 12/9/2025; 9 am

Communication Log Extract

Q: Are all of the completed visit notes also going to now show up in the Comm Log? or just in this report?

A: After 12/15/25, all completed Contact Note tasks will have a corresponding communication log generated. If the Contact Note task is completed and a service was delivered, the log will indicate that the service was provided. If the Contact Note task is completed by selecting one of the cancellation options, the log will reflect the cancellation that occurred.

Q: Do adhoc cancellation notes come up on this report as well?

If you are directly entering a cancellation note in the Communication Logs, it will appear in the extract. However, it is important to note that entering a log directly provides limited fields as opposed to using a Contact Note task to document the cancellation.

Q: What generates outcome of communication

The outcome of the communication in the extract is determined by the outcome button selected in the Contact Note task.

Deleted Contact Note Extract

Q: Can the deleted contact note report be run for an entire system regardless of whether system or provider agency does the billing? I think I heard you say we can run it by provider or is it solely by date?

A: The parameters for the Deleted Contact Note Extract are:

- Services Provided On or After Date & Services Provided On or Before Date
- Contact Note Deleted On or After Date & Contact Note Deleted On or Before Date

The notes that are returned will include the local system as well as any affiliated provider agencies for which the local system performs the billing activities.

Monitoring Ongoing Services Report

Q: Does the 'number of notes logged' include cancel notes?

The number of notes logged column will reflect the number of notes in which a service was delivered. It will not reflect notes in which a cancellation occurred – the Communication Log Extract would be the best source for this information.

Q: Does it tell you what change was made or just that a change was made?

Q: If the answer is YES to any of those change columns what other information will be added?

A: There are columns in this extract that will reflect if the service fields were edited in the reporting period with a yes or no. If yes is entered, this means that the field was edited in the reporting period.