

Workflow Enhancements

Question & Answer
Training 12/11/2025; 2 pm

IFSP Updates

Q: But what about if the long term goal was met but the short term goals are not met yet? Would it need to be made clear that the provider needs to make sure to create a new outcome and transfer the short term goals that are still pending?

A: TRAC-IT will be updated to end date all the related short-term goals when a long-term outcome is end-dated. As a result, any pending short-term goals would be needed to be re-entered on a new, active long-term goal.

Q: If the IFSP is saved as a draft and a family decides to refer back and the child is found eligible, can you use that draft IFSP or do you need to create a new IFSP task?

A: When a child is found ineligible, TRAC-IT assumes you are discharging the child. If the child is re-referred later, the draft IFSP is accessible for your reference but you will need to enter a new IFSP for this new referral.

Q: If the child is eligible, but they declined services, will it save a draft IFSP, and will that be available later?

A: A draft document is stored for your use when you complete the IFSP task indicating the guardians declined services.

Q: Will it save a draft of the IFSP at the initial assessment as well (when the child is found not eligible)?

A: A draft IFSP will be saved if the IFSP task is open when the child is found ineligible at an initial or subsequent evaluation.

Contact Note Updates

Q: When we upload a contact note do we have to also create a communication log in the extract?

A: Programs that are uploading contact notes via the EHR process do not need to add a communication log – TRAC-IT will create the log for you as part of storing your uploaded note.

New Tasks

Q: Will the permission to text and permission for telehealth tasks autopopulate into the intake tasks or do we need to select them separately?

A: The Permission for texting check box is still included on the Intake Visit task. However, if you would like the consent to be stored as a document, you should use the Permission for Texting ad hoc task. The permission for telehealth is only able to be documented in the new Permission for Telehealth ad hoc task.

Q: Does the ODU task need completed in order for it to be sent or is there an automatic setting that will send it to them?

A: In the Intake Visit task, you are able to select the guardian to receive the ODU Survey. If you need to update this selection, you would use the new Update ODU Survey Recipient task

Q: Is permission for texting and telehealth required?

A: The tasks are ad hoc tasks that are not required in the workflow in TRAC-IT.

Q: Can the permission for telehealth form be downloaded? Can the permission to telehealth be downloaded for offline?

A: The Permission for Texting and Permission for Telehealth tasks are available to be downloaded for offline use.

FCSA Task – MCO Updates

Q: How does the "child's assigned MCO" on the family Cost Share show in the insurance portion of the record?

There is no change with how the insurance information is displayed in the Insurance tab in the record.

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.