
EMR Contact Notes

Please use this guide in conjunction with the EMR Data Dictionary and XML schema to learn about the different types of contact notes in **TRAC-IT** and how each type should be imported.

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General Information

- ❖ Three types of contact notes

See the following sections for details about how to send each of the three types of contact notes: Service Coordination, Services, and Event contact notes. A contact note's type is determined by the *service type* sent in the note.

- ❖ Segment requirements

A single file can contain notes for multiple clients. Each Client entity must contain a minimum of client first name, last name, and birth date. Within the Client entity, the Enrollment entity must be sent with the child's enrollment number (**TRAC-IT** ID). Contact notes are sent within the Enrollment segment.

- ❖ Entities: Progress Notes and Service Logs

Each Contact Note consists of two entities in **TRAC-IT**: A Progress Note, and a Service Log. One or more Service Logs must be included inside a Progress Note.

- ❖ Updating contact notes

If planning to send updates to previously imported contact notes, retain the Progress Note ID and Service Log ID that are returned in the Response File after an import. Re-sending the contact note with these two IDs allows for updates, otherwise a new contact note will be created.

- ❖ Missed visits / cancelation notes

To upload a cancelation note or any other non-billable correspondence, consider uploading the Communication Log entity in addition to contact notes. Additional details for this entity can be found in the EMR data dictionary and XML schema.

Service Coordination Contact Notes

Service Types

| Code | Display |
|------|----------------------|
| 12 | Service Coordination |

All Available Fields

Bold denotes required. Please refer to the Data Dictionary for details about each field such as data type, length, and description.

- ❖ ProgressNote
 - **program > number**
 - **clinician > login**
 - **disciplineCode**
 - **locationCode**
 - participants
 - externalIdentifier
 - telehealth
 - id
 - **serviceLogs**
 - ❖ ServiceLog
 - **visitTime**
 - **minutes**
 - **serviceTypeCode**
 - **serviceCoordinationActivityCode**
 - progresses > Progress > description
 - externalIdentifier
 - clinicalNotes
 - diagnosis > icd10Code
 - diagnosis2 > icd10Code
 - diagnosis3 > icd10Code
 - notBillable
 - cptCode
 - units
 - modifier
 - familyContact
 - childPresent
 - noteMethodCode
 - id

Services Contact Notes

Service Types

| Code | Display |
|-------------|---|
| 1 | Assistive Technology Device |
| 2 | Audiology |
| 3 | Counseling |
| 4 | Health Services |
| 5 | Medical Services (diag/eval) |
| 6 | Nursing Services |
| 7 | Nutrition Services |
| 8 | Occupational Therapy |
| 9 | Physical Therapy |
| 10 | Psychological Services |
| 11 | Respite Care |
| 13 | Social Work Services |
| 15 | Speech-Language Path |
| 16 | Transportation |
| 17 | Vision Services |
| 18 | Developmental Services |
| 20 | Audiology/Assistive Technology Services |
| 21 | Audiology/Sign Language Services |
| 22 | Audiology/Cued Speech Services |
| 23 | Audiology/Listening and Spoken Language Services |
| 24 | Audiology/Assistive Technology Services/Sign Language Services |
| 25 | Audiology/Assistive Technology Services/Cued Speech Services |
| 26 | Audiology/AT Services/Listening and Spoken Language Services |
| 27 | Developmental Services/Assistive Technology Services |
| 28 | Developmental Services/Sign Language Services |
| 29 | Developmental Services/Cued Speech Services |
| 30 | Developmental Services/Listening and Spoken Language Services |
| 31 | Developmental Services/Assistive Technology Services/Sign Language Services |
| 32 | Developmental Services/Assistive Technology Services/Cued Speech Services |
| 33 | Developmental Services/AT Services/Listening and Spoken Language Services |
| 34 | Occupational Therapy/Assistive Technology Services |
| 35 | Physical Therapy/Assistive Technology Services |
| 36 | Vision Services/Assistive Technology Services |
| 37 | Speech-Language Path/Assistive Technology Services |
| 38 | Speech-Language Path/Sign Language Services |
| 39 | Speech-Language Path/Cued Speech Services |
| 40 | Speech-Language Path/Listening and Spoken Language Services |
| 41 | Speech-Language Path/AT Services/Sign Language Services |

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|----|---|
| 42 | Speech-Language Path/AT Services/Cued Speech Services |
| 43 | Speech-Language Path/AT Services/Listening and Spoken Language Services |
| 44 | Assistive Technology Services |

All Available Fields

Bold denotes required. Please refer to the Data Dictionary for details about each field such as data type, length, and description.

- ❖ ProgressNote
 - **program > number**
 - **clinician > login**
 - **disciplineCode**
 - **locationCode**
 - familyCaregiverUpdate
 - participants
 - externalIdentifier
 - telehealth
 - id
 - **serviceLogs**
 - ❖ ServiceLog
 - **visitTime**
 - **minutes**
 - **serviceTypeCode**
 - **intensityCode**
 - teamServices
 - progresses > Progress > description
 - externalIdentifier
 - ongoingAssessment
 - suggestions
 - clinicalNotes
 - diagnosis > icd10Code
 - diagnosis2 > icd10Code
 - diagnosis3 > icd10Code
 - cptCode
 - units
 - modifier
 - noteMethodCode
 - id

Event Contact Notes

Service Types

| Code | Display |
|-------------|---|
| 45 | Initial IFSP |
| 46 | Annual IFSP |
| 47 | IFSP Review |
| 48 | Eligibility Determination |
| 49 | Initial Assessment for Service Planning |
| 50 | Assessment |
| 51 | Intake |

All Available Fields

Bold denotes required. Please refer to the Data Dictionary for details about each field such as data type, length, and description.

- ❖ ProgressNote
 - **program > number**
 - **clinician > login**
 - **disciplineCode**
 - **locationCode**
 - familyCaregiverUpdate
 - participants
 - externalIdentifier
 - telehealth
 - id
 - **serviceLogs**
 - ❖ ServiceLog
 - **visitTime**
 - **minutes**
 - **serviceTypeCode**
 - progresses > Progress > description
 - externalIdentifier
 - ongoingAssessment
 - suggestions
 - clinicalNotes
 - diagnosis > icd10Code
 - diagnosis2 > icd10Code
 - diagnosis3 > icd10Code
 - cptCode
 - units
 - modifier
 - noteMethodCode
 - id