Q&A from EHR Support Desk – September 2024

Additional Resources:

File Testing and Certification (FTC) Environment Help section (must be logged in):
https://ftc.vaei.casetivity.com/pages/Help

- *Contains EMR File Testing and Certification Guide, EMR File Testing Scenarios, EMR File Upload Instructions, EMR Troubleshooting, Entity Dependencies, EMR Entity Match and Update Logic, EMR Contact Notes guide, and XML schemas.*

ITCVA Website's TRAC-IT Documents section: https://www.itcva.online/tracit-documents

- *Contains the Data Dictionary, XML Schema, XML Input File (sample), EMR Response Schema.*

ITCVA Website's TRAC-IT Webinars section: https://www.itcva.online/trac-it-webinars

- *Contains EMR Upload Demos, EMR Office Hours recordings, and past Q&A documents.*

Q&A:

1. **I successfully uploaded a file containing the intake visit. Can you explain why the Schedule Intake Visit task was canceled in the UI?**

   The schedule intake visit task was canceled because the visit was successfully uploaded to TRAC-IT, so there is no longer a need to schedule the intake. Anytime an event entity is uploaded to TRAC-IT, the task scheduling the event, if open, will be closed.

2. **We received the error, "The discipline is not valid for the attendee." We have sent several different disciplines, but none seem to work.**

   When sending an IFSP attendee, the discipline code of the attendee must match the discipline the provider is certified for in TRAC-IT. For example, if you send an attendee with a Speech and Language Pathology discipline, the discipline code needs to be SLP. The discipline code field references the Value Set tab in the Data Dictionary. *Attendee discipline is only a required field for the IFSP.*

3. **Child and family assessment consents are required for initial assessment data. Where is this in the data dictionary? As the error file states, I do not find it under "Assessment."**

   All consents in TRAC-IT (Child Assessment, Family Assessment, Provision of Early Intervention Services, Consent to Communicate, and Eligibility Determination) are uploaded through the consent entity rather than the specific event/action for which they provide consent. The required fields for consent entities are the *name, date, consent type code, and value code* fields. The consent type and value codes reference the Value Set in the data dictionary.

Have additional questions? Reach out to us at VATRACIT.FileCertification@ssg-llc.com.

4. **Can you please explain the "There are conflicting insurance payer priorities for this child. Please update the start date and end dates of the records or the payer priority to resolve the conflicts."**

   In insured cases, the matching logic for the insurance entity is *insurance coverage type, insurance start date, payer priority, and insurance brand name or insurance brand name/other (exact match).*

   When uploading insurance coverage matching these fields, the insurance record will not change. If any of these fields change in a subsequent upload, TRAC-IT will recognize it as new coverage and add it to the child's record.

   Since your file contained an existing record with the addition of the insurance brand name in the entity, TRAC-IT created a new record and the "*There are conflicting insurance payer priorities for this child. Please update the start date and end dates of the records, or the payer priority to resolve the conflicts*" was thrown. There can only be one insurance of the same payer priority for any period. For example, the record cannot list two insurances that are designated as primary insurance with overlapping dates.

5. **Is the Services Provided Early field required in TRAC-IT?**

   The services provided early field is not a required field in TRAC-IT. This field indicates that an Initial Early Intervention Service Coordination Plan was developed. If your program is using TRAC-IT for service coordination billing, you should plan to upload this field.

6. **Please explain how to upload notes for non-billable activities.**

   Generally, if the note you upload is non-billable, such as documenting a missed visit, you can send this information in the Communication Log entity. The available fields for Communication Logs are listed in the TRAC-IT data dictionary and XML schema. Non-billable Service Coordination contact notes can be uploaded using the progress note and service log entities.

7. **Please define what you mean by Visit Time and Gestational Age.**

   In TRAC-IT, the visit time indicates the start date/time of the service. Gestational age is captured in TRAC-IT as the duration, in weeks, of the child's gestation.

8. **What information is captured in the XML from the Family Cost Share Agreement?**

   The only information uploaded from the FCSA is the monthly cap. This field is not required on the enrollment, but it is important to send it if you plan to bill from TRAC-IT.

9. **If initials are entered in <familyInitialsNoConsent>, is it true that <familyPriorities> and <familyResources> are not required data elements?**

    Family concerns, priorities, and resources are required for the Initial and Annual IFSP, *although parents may decline to provide this information.* Since these fields are required to complete the IFSP, clinicians could enter an appropriate word or phrase if a client declines to share family concerns or priorities, such as "Declined."

10. **I sent blank/null values in fields referencing a value set. Is this why my file failed?**

    A common error in EMR XML files uploaded to TRAC-IT is sending a blank or null value for a field that references a value set. In general, for any fields that are blank or do not have any data, you should omit the field from the file rather than send the tag empty without a value.

11. **Please explain why we received the error "*One or more service plans are missing from the previous IFSP*"?**

    The IFSP that already exists on the record has three service plans, but the IFSP submitted in the file only contains two. TRAC-IT needs to account for the service plan added through the IFSP Review before creating the Annual IFSP. If the previous services ended at the Annual IFSP, you should still include these service plans in the file, but you can add an <endDate> if they have ended.

    IFSP Reviews and Annual IFSPs in TRAC-IT are iterative and build on the Initial IFSP sent originally. Please keep in mind:

    - Whenever an Initial, Annual, or IFSP review is sent, send all active service plans, outcomes, and goals (could be new or existing)

    - Additionally, send all service plans, outcomes, and goals that are ended as a part of the Annual IFSP or IFSP Review (not applicable to Initial IFSP)