Welcome!

The session will begin shortly

SSG

TRAC-IT

June 2025 Enhancements

- Cosigning Contact Notes
- Printing Batches of Contact Notes

TRAC-IT

June 2025 Enhancements

- **Update to the Overlapping Insurance Dashboard tile**
  - Displays discharged and open cases
- **Certification/Recertification – provider TIN field added (optional)**
- **Timeliness visible in the header of the case page**
- **Renaming the Services Provided Early box to Initial Service Coordination Plan Completed**

- **Soft Warnings:**
  - Discharge Task – if IFSP, Eligibility Determination, ASP tasks are open or if any tasks are open and assigned to a parent in the Parent Portal
  - Schedule IFSP Review and Annual IFSP tasks – a reminder to create the ad hoc Prior Notice task
- **Service Plan methods – only one will be allowed**
- **Cosigning Contact Notes**
- **Printing Batches of Contact Notes**
- **Medicaid Insurance**
  - Multiple updates that streamline how Medicaid insurance records are entered

TRAC-IT

CoSigning Contact Notes

✓ **Enables cosignature of Contact Notes**

✓ **Cosignature is displayed on Print Template**

Important Notes

❖ Cosignature date is not the date used for timeliness validation – date of service entered in the note is the date used for timeliness validation

❖ Cosignature date must be the day the task is being completed

❖ Cosigner must:
- Have an active account in TRAC-IT
- Be from the same organization as the person requesting the cosignature
- Have one of the following roles in their TRAC-IT account: Service Coordinator, Supervisor, Provider

❖ User assigned to the cosignature task must be the clinician chosen to cosign the note

❖ Billing Extract has two additional columns added for cosigner and cosign date

Demo of Cosigning Contact Notes

Printing Batches of Contact Notes

✓ **Enables printing batches of Contact Notes on the TRAC-IT Print Template**

✓ **Can select from the following options:**

- ✓ **Date range**
- ✓ **Clinician/Provider**
- ✓ **Cosigned Notes only**
- ✓ **Enrollment**

Important Notes

❖ Information in the file is extracted from the stored Contact Note.

❖ TRAC-IT provides a file with up to 250 notes included. If the request produces more than 250 notes, multiple files will be provided.

❖ Sort of the notes in the file:

- ▪ First – Enrollment
- ▪ Second – Clinician
- ▪ Third – Date of Service

Demo of Printing Batches of Contact Notes