



## BUS Update Memorandum

TO: All BUS Users  
FROM: Rhonda Johnson - BUS Administrator  
DATE: February 7, 2019  
RE: BUS Log Notes Reporting Enhancements

### **What is changing?**

On February 16, 2019, nine (9) enhancements will be made to the Log Notes and Log Notes Reporting modules in the Benefits Utilization System (BUS).

### **Why is this change being made?**

These changes are being made to enhance the reporting of Log Notes. The changes will ensure compliance with federal requirements, improve reporting capabilities for Case Management Agencies (CMAs), and provide oversight for CMAs.


## Change #1

### Two (2) Updates to the Add Log Notes Screen

1. A new contact type of Rights Modification will be added to the existing drop-down menu.

Test - Client - Log Notes - Baklava D pudding - \*\*\*\*-\*\*-6666

### Log Notes - New

Date of Contact	01/30/2019
Time of Contact	9:48:03 AM
Person Contacted	
Billable Log Note Units	0 Units
Non-Billable Log Note Units	0 Units
<b>Type of Contact</b>	
Current Program	
Is this log note a Targeted Case Management Note?	
Did this contact take place Face to Face?	
Confidential?	
Does this log note refer to a New Critical Incident?	
Does this log note refer to an Existing Critical Incident?	
If New/Existing Critical Incident is YES, Enter CIRS Number:	
 A log note should only be marked confidential if it could not be viewed by any other agency.	
Narrative:	

- Adult Protection
- Case Assigned
- Case Documentation
- Case/Family Conference
- Complaint
- Complaint Follow-up
- Contact at place of employment
- Correspondence
- Discharge and Termination
- Email
- Enrollment Activity
- Face-to-Face
- FAX
- Financial Eligibility
- Home Visit
- Hospitalization
- ICM
- IMT Communication
- Intra-Office Communication
- Monitoring Contact-Scheduled
- Monitoring Contact-Unscheduled
- Nursing Facility Placement
- PAR Denial
- Program notes
- Psychiatric Review
- Quarterly
- Referral - Worker Assigned
- Rights Modification**
- Service Plan Development

ould not

Save Clear

- A new question "Did this contact take place Face-to-Face?" will be added. This information will populate a Y or N on the Log Notes Detailed Report reflecting the choice on the Add screen.  
The report will populate N/A for those log notes entered prior to February 16, 2019.

Test - Client - Log Notes - Baklava D pudding - \*\*\*-\*\*-6666

### Log Notes - New

**Date of Contact** 01/30/2019

**Time of Contact** 9:48:03 AM

**Person Contacted**

**Billable Log Note Units** 0 Units

**Non-Billable Log Note Units** 0 Units

**Type of Contact**

**Current Program**

**Is this log note a Targeted Case Management Note?**  Yes  No

**Did this contact take place Face to Face?**  Yes  No

**Confidential?**  Yes  No

**Does this log note refer to a New Critical Incident?**  Yes  No

**Does this log note refer to an Existing Critical Incident?**  Yes  No

**If New/Existing Critical Incident is YES, Enter CIRS Number:**

**A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.**

**Narrative:**

Test - BUSReporter

### Log Notes Detailed Report

**Agency: Health Care Policy and Financing**  
**Case Manager Name: Johnson, Rhonda**

Report Created: 01/30/2019 9:52 AM  
Entered Date: from 01/16/2019 to 01/30/2019  
Units entered prior to the log note report update on 08/31/2018, are under non-billable units.

	Log Note ID	Case Manager	Client Name	Client State ID	Client Program (current)	Client Program (at time of log note)	Contact Date	Contact Time	Entered Date	Person Contacted	Contact Type	Billable Units	Non-Billable Units	TCM Units	Non-TCM Units	Contact Face to Face	
<a href="#">View</a>	29710752	Johnson, Rhonda	pudding, Baklava	A000000	Developmental Disabilities (DD)	Developmental Disabilities (DD)	01/28/2019	08:19	01/28/2019	Administrative Law Judge	Rights Modification	4	5	N	0	9	Y
<a href="#">View</a>	29710751	Johnson, Rhonda	pudding, Baklava	A000000	Developmental Disabilities (DD)	Developmental Disabilities (DD)	01/25/2019	14:01	01/25/2019	Administrative Law Judge	Summary Report - Quarterly Contact	10	0	N	0	10	Y

## Change #2

### One (1) update to the Client Log Note Search

1. The Client Log Note search will now show units in two columns, billable and non-billable.

Current view:

Log Note ID	Date of Contact	Date of Entry	Narrative	Type of Contact	Who Contacted	Input Worker	LogNoteInit
29987096 <a href="#">Display</a> <a href="#">Delete</a>	11/20/2018 08:14:32 AM	11/20/2018 08:14:32 AM	A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.	Case/Family Conference	Adult Protection Worker	Rhonda Johnson	0
29987088 <a href="#">Display</a> <a href="#">Delete</a>	11/20/2018 08:14:30 AM	11/20/2018 08:14:30 AM	A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.	Case Documentation	Adult Protection Worker	Rhonda Johnson	0

New view:

Log Note ID	Date of Contact	Date of Entry	Narrative	Type of Contact	Who Contacted	Input Worker	Billable Log Note Units	Non-Billable Log Note Units
20710752 <a href="#">Display</a> <a href="#">Delete</a>	01/28/2019 08:20:03 AM	01/28/2019 08:20:03 AM	A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.A log note should only be marked confidential if it contains sensitive information that should not be viewed by any other agency.	Rights Modification	Administrative Law Judge	Rhonda Johnson	4	5
29710751 <a href="#">Display</a> <a href="#">Delete</a>	01/25/2019 02:01:33 PM	01/25/2019 02:01:33 PM	should only be marked confidential if it contains sensitive information that should not be viewed by any other agencyshould only be marked confidential if it contains sensitive information that should not be viewed by any other agencyshould only be marked confidential if it contains sensitive information that should not be viewed by any other agency	Summary Report - Quarterly Contact	Administrative Law Judge	Rhonda Johnson	10	0

## Change #3

### Six (6) updates to the Log Notes Reporting Module

1. The report interface will now allow CMAs to select only Case Manager generated log notes, system-generated log notes, or both.

Test - BUSReporter

### Log Notes Detailed Report

Agency:

Type of Contact:

Program Waiver:

Case Manager:

Billable Log Note Units:

Non-Billable Log Note Units:

Start Date:  (mm/dd/yyyy)

End Date:  (mm/dd/yyyy)

Date Search Type:  Date Entered  Date of Contact

**System Generated:  All Lognotes  Non System Generated Lognotes**

Show Narrative:

- The report interface will include a selection for the Client Program Waiver. This will allow CMAs to generate reporting based on the client program.

Test - BUSReporter  
**Log Notes Detailed Report**

Agency: A Rise Above

Type of Contact: All

**Program Waiver: All**

Case Manager: [All]

Billable Log Note Units: All

Non-Billable Log Note Units: All

Start Date: 01/16/2019 (mm/dd/yyyy)

End Date: 01/30/2019 (mm/dd/yyyy)

Date Search Type:  Date Entered  Date of Contact

System Generated:  All Lognotes  Non System Generated Lognotes

Show Narrative:

Submit

- Formatting has been corrected on the Excel exports. Previously, Excel would export log note narratives to multiple lines if the return button was used when entering the narrative. This has been corrected and the narrative will now populate in one cell upon Excel export.

Current view:

Log Note ID	Case Manager	Client Name	Client State ID	Client Program (current)	Client Program (at time of Log Note)	Contact Date	Contact Time	Entered Date	Person Contacted	Contact Type	Billable Units	Non-Billable Units	TCM Units	TCM Units	Non-TCM Units	Narrative
30378302	*****	*****	*****	*****	*****	*****	*****	1/4/2019	Multiple	Service Plan Development	5	0	Y	5	0	***** left me a voice mail  I also received an email from *****  ***** then emailed me  She later called stating *****

New view:

Log Note ID	Case Manager	Client Name	Client State ID	Client Program (current)	Client Program (at time of Log Note)	Contact Date	Contact Time	Entered Date	Person Contacted	Contact Type	Billable Units	Non-Billable Units	TCM Units	TCM Units	Non-TCM Units	Contact Face to Face	Narrative
30378302	*****	*****	*****	*****	*****	*****	*****	1/4/2019	Multiple	Service Plan Development	5	0	Y	5	0	N/A	*****left me a voicemail  I also received an email from *****  *****then emailed me  She later called stating *****

- System generated log notes will now include the client's current program.

Test - BUSReporter  
**Log Notes Detailed Report**  
Agency: A Rise Above  
Case Manager Name: [All]  
Report Created: 01/30/2019 10:12 AM  
Entered Date: from 01/01/2019 to 01/30/2019  
Units entered prior to the log note report update on 08/31/2018, are under non-billable units.

Log Note ID	Case Manager	Client Name	Client State ID	Client Program (current)	Client Program (at time of log note)	Contact Date	Contact Time	Entered Date	Person Contacted	Contact Type	Billable Units	Non-Billable Units	TCM Units	TCM Units	Non-TCM Units	Contact Face to Face
29710693	Tester, Theo	Pudding, Rice	G123456	Elderly, Blind, and Disabled (EBD)	Elderly, Blind, and Disabled (EBD)	01/08/2019	09:05	01/08/2019	System	Eligibility Assessment-Remove Final Date	0	0	N	0	0	N/A

Printable View    Export to Excel

- The TCM column on the Log Notes Detailed report has been updated. The column will now show N for system generated log notes instead of F (false) for consistency.

Test - BUSReporter  
**Log Notes Detailed Report**  
 Agency: A Rise Above  
 Case Manager Name: [All]  
 Report Created: 01/30/2019 10:12 AM  
 Entered Date: from 01/01/2019 to 01/30/2019  
 Units entered prior to the log note report update on 08/31/2018, are under non-billable units.

View	Log Note ID	Case Manager	Client Name	Client State ID	Client Program (Current)	Client Program (at time of log note)	Contact Date	Contact Time	Entered Date	Person Contacted	Contact Type	Billable Units	Non-Billable Units	TCM	TCM Units	Non-TCM Units	Contact Face to Face
	29710693	Tester, Theo	Pudding, Rice	G123456	Elderly, Blind, and Disabled (EBD)	Elderly, Blind, and Disabled (EBD)	01/08/2019	09:05	01/08/2019	System	Eligibility Assessment-Remove Final Date	0	0	N	0	0	N/A

Printable View    Export to Excel

- The Face to Face Log Notes Monthly Summary report has been updated. The criteria to populate this report has been updated to populate based on the Log Note Contact Type of Summary Report - Quarterly Contact, and not Face-to-Face.

This report will only populate data from September 1, 2018 and forward.

Test - BUSReporter  
**Face to Face Log Notes Monthly Summary**  
 Agency: Health Care Policy and Financing  
 Case Manager Name: All  
 Report Created: 01/31/2019 9:29 AM  
 The data for this report was last processed: 01/31/2019 6:00 AM

2018												
NAME	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Brahe, Nora												
pudding, chocolate									1	1		1
Pudding, Strawberry												
Burnham, Terry												
2018												
NAME	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
pudding, Baklava									1	1	1	
Pudding, Figgy												
Tester, Theo												
2018												
NAME	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Pudding, Figgy										1		

Printable View    Export to Excel

If you have any questions about these changes to the Log Notes Reporting, please contact:

BUS Administrator  
 Rhonda Johnson, [Rhondab.Johnson@state.co.us](mailto:Rhondab.Johnson@state.co.us)