

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).

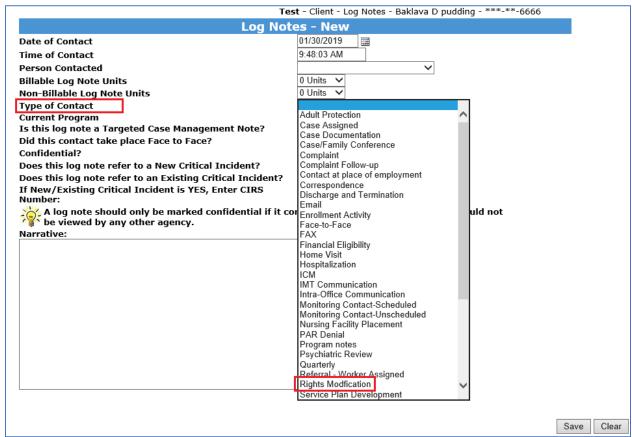
Why is this change being made?

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 dropdown menu.



2. 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.

| Te | est - Client - Log Notes - Baklava D pudding - ***-**-6666 |
|--|--|
| Log Not | tes - 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 | Developmental Disabilies (DD) |
| Is this log note a Targeted Case Management Note? | ○ Yes ○ No |
| Did this contact take place Face to Face? Confidential? | ○ Yes ○ No |
| Does this log note refer to a New Critical Incident? | ○ Yes ● No ○ Yes ○ No |
| Does this log note refer to a New Critical Incident? Does this log note refer to an Existing Critical Incident? | ○ Yes ○ No |
| If New/Existing Critical Incident is YES, Enter CIRS | ○ Yes ○ No |
| Number: | |
| /¥^ be viewed by any other agency. Narrative: | |
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| | Save |

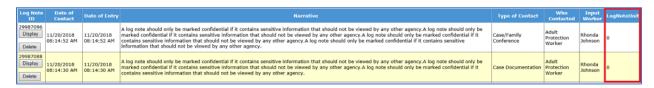


Change #2

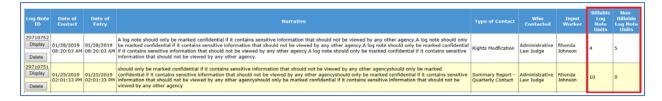
One (1) update to the Client Log Note Search

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

Current view:



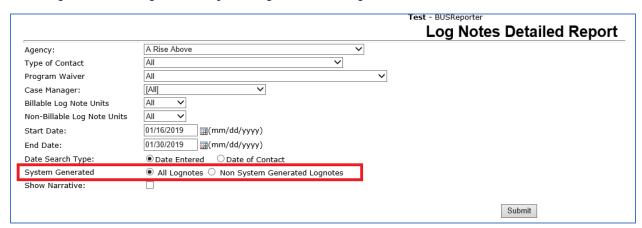
New view:



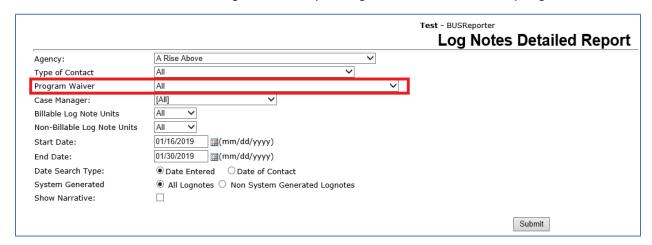
Change #3

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.

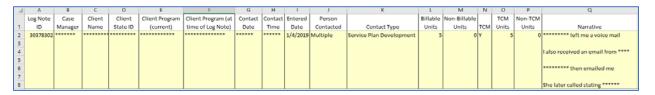


2. The report interface will include a selection for the Client Program Waiver. This will allow CMAs to generate reporting based on the client program.



3. 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:



New view:



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



5. 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.



6. 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 Created: 03/31/31/31/31/31/31/31/31 | | | | | | | | | | | | | | |
|--|------|-----|-----|-----|-----|-----|--|-----|---|-----|-----|-----|--|--|
| Brahe, Nora | | | | | | | | | | | | | | |
| NAME | JAN | | MAR | APR | MAY | JUN | | AUG | | OCT | NOV | DEC | | |
| pudding, chocolate | | | | | | | | | | 1 | | 1 | | |
| Pudding, Strawberry | | | | | | | | | 1 | | | | | |
| Burnham, Terry | 2018 | | | | | | | | | | | | | |
| NAME | JAN | FEB | MAR | APR | MAY | JUN | | AUG | | ост | NOV | DEC | | |
| pudding, Baklava | | | | | | | | | 1 | | 1 | | | |
| Pudding, Figgy | | | | | | | | | | 1 | | | | |
| Tester, Theo | 2018 | | | | | | | | | | | | | |
| NAME | JAN | | MAR | APR | MAY | JUN | | AUG | | | 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

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