



## INFORMATIONAL MEMO

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**INFORMATIONAL MEMO NUMBER: HCPF IM 18-027**

**TITLE: BUS UPDATE MEMO AUGUST 2018**

**SUPERSEDES NUMBER: N/A**

**ISSUE DATE: AUGUST 31, 2018**

**EFFECTIVE DATE: SEPTEMBER 1, 2018**

**DIVISION AND OFFICE: OPERATIONS & ADMINISTRATION, OFFICE OF  
COMMUNITY LIVING**

**PROGRAM AREA: POLICY, SYSTEMS, AND OPERATIONS**

**APPROVED BY: JOANNE SVENNINGSSEN**

**KEY WORDS: BENEFITS UTILIZATION SYSTEM, BUS, LOG NOTES, LOG NOTES  
REPORTING**

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### **Purpose and Audience:**

This Benefits Utilization System (BUS) Update Memo describes changes to the Log Notes Reporting functionality and will be sent to all Case Management Agencies. Four enhancements will be made to the Add Log Notes screen, and two new Log Notes Reports have been created.

### **Information:**

On September 1, 2018, four (4) enhancements will be made to the Add Log Notes screen, and two (2) new enhanced log notes reports will be made available for use by Case Management Agencies.


These changes are being made to enhance the reporting capabilities of log notes for Case Management Agencies.

### Change #1 – Log Notes Add Screen – Change to Existing Fields

The Log Notes Add Screen has been modified to incorporate new questions and to provide more information that will populate into the enhanced Log Notes Reports.


1. Log Notes Units – This has now been separated into two fields: Billable Log Note Units and Non-Billable Log Note Units.
2. Eight new Contact Types have been added:
  - a. Complaint
  - b. Complaint Follow-up


- c. Discharge and Termination
  - d. Enrollment Activity
  - e. ICM
  - f. Service Plan Development
  - g. Transition Coordination
  - h. Travel
3. The Current Program the client is enrolled in has been added to the screen and will auto populate.
  4. The question, "Is this log note a Targeted Case Management Note?" has been added to the screen

Log Notes - New	
Date of Contact	08/07/2018
Time of Contact	11:48:16 AM
Person Contacted	
Billable Log Note Units	0 Units
Non-Billable Log Note Units	0 Units
Type of Contact	
Current Program	Brain Injury (BI)
Is this log note a Targeted Case Management Note?	<input type="radio"/> Yes <input type="radio"/> No
Confidential?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Does this log note refer to a New Critical Incident?	<input type="radio"/> Yes <input type="radio"/> No
Does this log note refer to an Existing Critical Incident?	<input type="radio"/> Yes <input type="radio"/> 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:	
<div style="border: 1px solid gray; height: 150px; width: 100%;"></div>	
<input type="button" value="Save"/> <input type="button" value="Clear"/>	

These changes are all indicated on the screenshots below.

## New Contact Types:

<p><b>Type of Contact</b></p> <p><b>Current Program</b></p> <p><b>Is this log note a Targeted Case Management Note? Confidential?</b></p> <p><b>Does this log note refer to a New Critical Incident?</b></p> <p><b>Does this log note refer to an Existing Critical Incident?</b></p> <p><b>If New/Existing Critical Incident is YES, Enter CIRS Number:</b></p> <p> <b>A log note should only be marked confidential if it cannot be viewed by any other agency.</b></p> <p><b>Narrative:</b></p> <div style="border: 1px solid black; height: 150px; width: 100%;"></div>	<ul style="list-style-type: none"> <li>Adult Protection</li> <li>Case Assigned</li> <li>Case Documentation</li> <li>Case/Family Conference</li> <li>Complaint</li> <li>Complaint Follow-up</li> <li>Contact at place of employment</li> <li>Correspondence</li> <li>Discharge and Termination</li> <li>Email</li> <li>Enrollment Activity</li> <li>Face-to-Face</li> <li>FAX</li> <li>Financial Eligibility</li> <li>Home Visit</li> <li>Hospitalization</li> <li>ICM</li> <li>IMT Communication</li> <li>Intra-Office Communication</li> <li>Monitoring Contact-Scheduled</li> <li>Monitoring Contact-Unscheduled</li> <li>Nursing Facility Placement</li> <li>PAR Denial</li> <li>Program notes</li> <li>Psychiatric Review</li> <li>Quarterly</li> <li>Referral - Worker Assigned</li> <li>Service Plan Development</li> <li>Summary Report - 6 Month Review</li> </ul>
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<p><b>Type of Contact</b></p> <p><b>Current Program</b></p> <p><b>Is this log note a Targeted Case Management Note? Confidential?</b></p> <p><b>Does this log note refer to a New Critical Incident?</b></p> <p><b>Does this log note refer to an Existing Critical Incident?</b></p> <p><b>If New/Existing Critical Incident is YES, Enter CIRS Number:</b></p> <p> <b>A log note should only be marked confidential if it cannot be viewed by any other agency.</b></p> <p><b>Narrative:</b></p> <div style="border: 1px solid black; height: 150px; width: 100%;"></div>	<ul style="list-style-type: none"> <li>Face-to-Face</li> <li>FAX</li> <li>Financial Eligibility</li> <li>Home Visit</li> <li>Hospitalization</li> <li>ICM</li> <li>IMT Communication</li> <li>Intra-Office Communication</li> <li>Monitoring Contact-Scheduled</li> <li>Monitoring Contact-Unscheduled</li> <li>Nursing Facility Placement</li> <li>PAR Denial</li> <li>Program notes</li> <li>Psychiatric Review</li> <li>Quarterly</li> <li>Referral - Worker Assigned</li> <li>Service Plan Development</li> <li>Summary Report - 6 Month Review</li> <li>Summary Report - CDAS Reassessment</li> <li>Summary Report - Closure</li> <li>Summary Report - CSR</li> <li>Summary Report - Initial</li> <li>Summary Report - Monthly Contact</li> <li>Summary Report - Quarterly Contact</li> <li>Summary Report - Transfer</li> <li>Supervisory PAR Review</li> <li>Telephone</li> <li>Transition Coordination</li> <li>Travel</li> <li>Veterans Representative</li> </ul>
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## Change #2 – Detailed Log Notes Report

This report will incorporate the new fields added to the Add Log Notes Screen described in Change #1, creating a more robust report for log notes.

Location of Report:

Administration > BUS Reports > - Log Note Detailed Report

The screenshot shows the BUSReporter Menu interface. On the left is a 'Main Menu' with a vertical list of options. The 'Log Notes Detailed Report' option is highlighted with a red rectangular box. To the right of the menu is the 'BUSReporter Menu' header and a note: 'The data in these reports are updated on a daily basis.'

Main Menu	BUSReporter Menu
Administration	The data in these reports are updated on a daily basis.
BUS Reports	
- Assessment	
- Case Management (Agency)	
- Case Status ARCHIVE	
- Case Status	
- Log Notes	
- Referral Dates	
- Service Plan	
- User Aging	
- User List	
- Case Manager (Only) Report	
- Case Manager (Only) Log Notes Report	
<b>- Log Notes Detailed Report</b>	
- Case Manager Face to Face Log Notes Report	
- Face to Face Log Notes Monthly Summary	
- Case Manager Assessment Report	

## Detailed Log Note Report Interface

The screenshot shows the 'Log Notes Detailed Report' interface. At the top right, it says 'Test - BUSReporter' and 'Log Notes Detailed Report'. Below this are search filters for Agency, Case Manager, Start Date, End Date, Date Search Type, and Show Narrative. A 'Submit' button is located at the bottom right.

Agency:	Health Care Policy and Financing
Case Manager:	[All]
Start Date:	07/01/2018 (mm/dd/yyyy)
End Date:	07/31/2018 (mm/dd/yyyy)
Date Search Type:	<input checked="" type="radio"/> Date Entered <input type="radio"/> Date of Contact
Show Narrative:	<input type="checkbox"/>

Submit

# Report View

Test - BUSReporter

### Log Notes Detailed Report

**Agency: Health Care Policy and Financing**  
**Case Manager Name: [All]**  
 Report Created: 08/07/2018 12:43 PM  
 Entered Date: from 07/01/2018 to 07/31/2018  
 Units entered prior to the log note report update on 07/17/2018, are under non-billable units.

	Case Manager	Client Name	Client State ID	Client Program (current)	Client Program (at time of report)	Contact Date	Contact Time	Entered Date	Contact Type	Billable Units	Non-Billable Units	TCM	TCM Units	Non-TCM Units	Narrative
View	Kissinger, Mike	Pudding, Figgy	Z998872	Community Mental Health Supports (CMHS)		07/30/2018	07:38	07/30/2018	Complaint Follow-up	0	0	F	0	0	TC Home Visit
View	Kissinger, Mike	Pudding, Figgy	Z998872	Community Mental Health Supports (CMHS)		07/30/2018	07:24	07/30/2018	Complaint Follow-up	0	0	F	0	0	TC Home Visit
View	Kissinger, Mike	Pudding, Figgy	Z998872	Community Mental Health Supports (CMHS)		07/30/2018	06:52	07/30/2018	Complaint Follow-up	0	0	F	0	0	TC Home Visit
View	Stansell, Keith	Pudding, Figgy	Z998872	Community Mental Health Supports (CMHS)		07/18/2018	15:24	07/18/2018	Home Visit	2	1	T	3	0	'This is a test log note.'

## Change #3 – Face to Face Log Notes Monthly Summary

This new report will summarize all face to face log notes by Case Managers. Case Managers are still required to comply with recent Department direction that all required contacts are to use the "Summary Report" contact type when documenting the contact.

Location of Report:

Administration > BUS Reports > - Face to Face Log Notes Monthly Summary

**Main Menu**

- Administration
- BUS Reports
- Assessment
- Case Management (Agency)
- Case Status ARCHIVE
- Case Status
- Log Notes
- Referral Dates
- Service Plan
- User Aging
- User List
- Case Manager (Only) Report
- Case Manager (Only) Log Notes Report
- Log Notes Detailed Report
- Case Manager Face to Face Log Notes Report
- Face to Face Log Notes Monthly Summary
- Case Manager Assessment Report

**BUSReporter Menu**

The data in these reports are updated on a daily basis.

## Face to Face Log Notes Monthly Summary User Interface

Test - BUSReporter

### Face to Face Log Notes Monthly Summary

The data for this report was last processed: In Process

Agency:

Case Manager:

Year:

**Note: This report is in testing and not currently running on a schedule.**

## Report View

Test - BUSReporter

### Face to Face Log Notes Monthly Summary

Agency: A Rise Above  
Case Manager Name: All  
Report Created: 08/07/2018 12:52 PM  
The data for this report was last processed: 08/07/2018 6:00 AM

2018												
NAME	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Chapman, Donna	1											
					1							
					2							
2018												
NAME	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Ciano-Mcgee, Kathryn					1							
2018												
NAME	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Davidson, Amy				1								
				1								
				1								
					1							
					1							
				1								
				1								
2018												
NAME	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Mathews, Katie							1					
2018												
NAME	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Meior, Antonia			1									

### Attachments:

None

### Department Contact:

Brittani Trujillo, Case Management Section Manager, Office of Community Living  
[Brittani.Trujillo@state.co.us](mailto:Brittani.Trujillo@state.co.us)

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