Contacts Log

AWARDS INSTRUCTION SHEET

The Contacts Log feature in the AWARDS Services module enables case managers and counselors to quickly and easily record contact with consumers. At the same time contacts log records are being entered or updated, progress notes can also be written to further document each contact. Contacts log reports can also be viewed as necessary using this AWARDS feature.

There are two contacts log formats available for use within AWARDS: the Basic Contacts Log (the default functionality), which is used to record a single service per contact via entry of a contacts log record, and the Supportive Services Checklist, which is used to record one or more services per contact without requiring entry of a contacts log record or progress note. This document provides instructions on using the Basic Contacts Log version of the functionality only. Instructions on using the Supportive Services Checklist can be found here in Online Help.

REQUIRED PERMISSIONS

Permissions required to work with contacts log records are:

- Chart Access – You must have permission for each program associated with the consumer for whom a contacts log record is to be entered, updated, and/or viewed.
- Data Entry / Access – You must have the "Display Chart Records Services Button" and the "Display Any Chart Records Button" permissions in order to see the Services module in the Chart Records portion of your *Opening Menu* page.

Additionally, though you can view contacts written by others using report mode, you can only update and delete contacts log records you yourself entered. An exception is made for users with the "Surrogate Data Entry – Contacts Log" permission.

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of working with contacts log records in both data entry and report modes. Specific topics covered are:

ENTERING AND UPDATING CONTACTS LOG RECORDS

To enter or update a contacts log record, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.

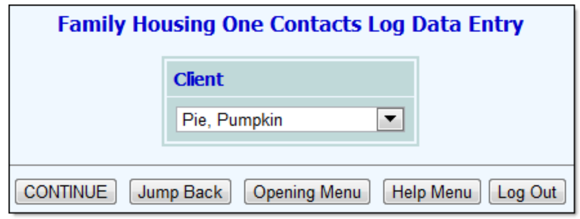
2. Click the **Program** drop-down arrow and select the program or program type associated with the consumer for whom a contacts log record is to be entered or updated.

3. Click the **Database** drop-down arrow and select "Data Entry."

4. To limit consumer selection by name, click the **A-Z** drop-down arrow and select the consumer's last name initial. An asterisk (*) in this field will include all consumers in the selection process.

5. If the contacts log record is to be entered or updated for a former (discharged) consumer, click the **Roster Archives** check box.

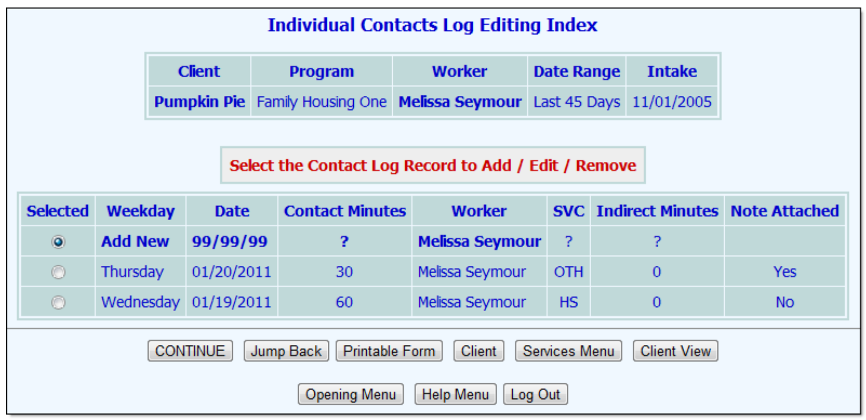
6. Click **Contacts Log**. The *Contacts Log Data Entry* page is displayed.



7. Click the **Client** drop-down arrow and select the consumer for whom the contacts log record is to be entered or updated.

8. If you have the "Surrogate Data Entry – Contacts Log" permission you will also see a **Worker** selection list on this page, with yourself selected by default. If you will be working with contacts log records entered by another user, select that user from the worker list at this time.

9. Click **CONTINUE**. The *Individual Contacts Log Editing Index* page is displayed.



This page contains a list of all existing contacts log records for the selected consumer that have dates within the editing window date range shown at the top of the page.

The Note Attached column displays "Yes" for contacts log records in the index that have corresponding progress notes. Otherwise, this column displays "No."

10. Click the **Selected** radio button next to the record to be updated, or next to "Add New" when entering a new contacts log record.

A solid bullet next to a record indicates one or more of the following:

- *That you are not the individual who recorded the contact. Only the user who entered the record or another user with the "Surrogate Data Entry – Contacts Log" permission can edit it.*

- *That the record falls outside of the editing window and the backdating data entry permission may be required to edit it.*

- *That the record has been locked and cannot be opened for updating. If necessary, this type of record can be unlocked by users with the "Unlock Contacts Log" permission, at which point it can be selected for editing as needed. (For more information, please refer to the Frequently Asked Questions on page 12.)*

A lock and key icon next to a record indicates that the progress note associated with that contact has been electronically signed, preventing further edits. Such records cannot be unlocked and cannot be selected for updating.

11. Click **CONTINUE**. The *Contacts Log Settings* page is displayed.

12. Enter or make changes to the following contact information:

    There are two contacts log record formats – simple and detailed. The format your agency has chosen to use affects which of the contacts log fields and options are available to you on the Contacts Log Settings page. Please disregard instructions for those fields and options listed here that are not included in your contacts log format.

    - **Date** – Click the drop-down arrow and select the date on which contact with the consumer occurred. The default value is today's date.
    - **Duration** – Click the drop-down arrows and select the length of the contact. The default value is 15 minutes for day programs, and 30 minutes for housing programs.
    - **Contact Time** – Click the drop-down arrows and select the length of *in person* contact time, if applicable. The default value is 15 minutes for day programs, and 30 minutes for housing programs.
    - **Face to Face** – Click a radio button to indicate whether contact with the consumer was face to face (in person). Available options are "Yes" and "No."
    - **Service Type** – Click the drop-down arrow and select the type of service that was provided during the contact.
    - **Indirect Time** – Click the drop-down arrows and select the length of *indirect* contact time, if applicable. The default value is no time.
    - **Contact Location** – Click the drop-down arrow and select the location of the contact. The default value is "This program site."
    - **Contact Method** – Click the drop-down arrow and select the method of the contact. The default value is "In Person."
    - **Attempted/Actual Contact** – If "In Person" or "Phone Call" is selected as the contact method, click the "Actual Contact" or "Attempted Contact" radio button to indicate whether the contact was actual or attempted.

13. To enter or update a progress note for this contact, click the **Check Here to Add/Edit Progress Note** check box.

    Progress notes added using this method are saved as "general chart notes."

14. Click **CONTINUE**. If the progress note option was NOT selected, the contacts log record is saved, the updated *Contacts Log Editing Index* page is displayed, and the process of entering or updating a contacts log record is now complete. If the progress note option WAS selected, the *Progress Note Data Entry* page is displayed.

Continue with step **15**.

15. If necessary, click the **Service Type** drop-down arrow and select a different service type for the progress note.

16. Click the **Crisis?** drop-down arrow and select "Routine" or "Crisis" to indicate the nature of the contact on which this note is reporting.

17. In the text box provided, make changes or additions to the progress note text as necessary.

    WARNING! *Deleting the progress note by deleting all text and saving the note also deletes the associated contacts log record.*

18. If necessary, click the **Sign Off Note** check box. When this option is selected, no note overwriting or edits are allowed after the note is saved.

    This option is only available when the "No Automatic Sign Off" option is selected in the System Setup module, Business Rules, Note Editing Rules feature.

19. Click **SAVE NOTE**. The contacts log record and progress note are saved and the updated *Individual Contacts Log Editing Index* page is displayed.

The process of entering or updating a contacts log record and progress note is now complete.

DELETING CONTACTS LOG RECORDS

To delete a contacts log record, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program or program type associated with the consumer for whom a contacts log record is to be deleted.

3. Click the **Database** drop-down arrow and select "Data Entry."

4. To limit consumer selection by name, click the **A-Z** drop-down arrow and select the consumer's last name initial. An asterisk (*) in this field will include all consumers in the selection process.

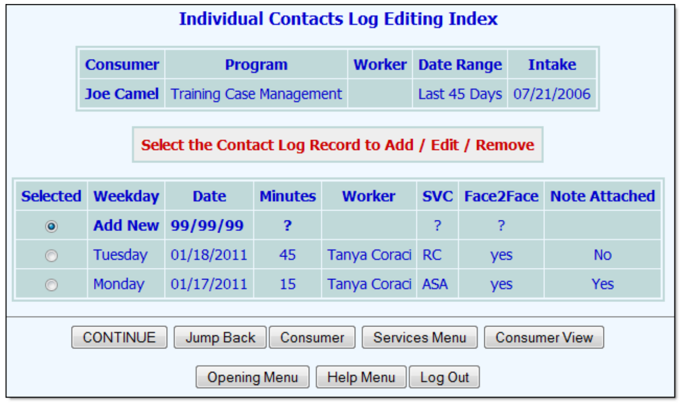
5. If the contacts log record is to be deleted for a former (discharged) consumer, click the **Roster Archives** check box.

6. Click **Contacts Log**. The *Contacts Log Data Entry* page is displayed.

7. Click the **Client** drop-down arrow and select the consumer for whom the contacts log record is to be deleted.

8. If you have the "Surrogate Data Entry – Contacts Log" permission you will also see a **Worker** selection list on this page, with yourself selected by default. If you will be deleting a contacts log record entered by another user rather than one you entered, select that user from the worker list at this time.

9. Click **CONTINUE**. The *Individual Contacts Log Editing Index* page is displayed.



This page contains a list of all existing contacts log records for the selected consumer that have dates within the editing window date range shown at the top of the page.

The Note Attached column displays "Yes" for contacts log records in the index that have corresponding progress notes. Otherwise, this column displays "No."

10. Click the **Selected** radio button next to the record to be deleted.

    A solid bullet next to a record indicates that it has been locked and cannot be opened for deleting. If necessary, this type of record can be unlocked by users with the "Unlock Contacts Log" permission, at which point it can be selected for deletion as needed. (For more information, please refer to the Frequently Asked Questions on page 12.)

    A lock and key icon next to a record indicates that the progress note associated with that contact has been electronically signed, preventing further edits. Such records cannot be unlocked and cannot be selected for deletion.

11. Click **CONTINUE**. The *Contacts Log Settings* page is displayed.

12. De-select the **Check Here to Add/Edit Progress Note** option and click **DELETE**. The *Confirm Delete?* page is displayed.

13. Click **DELETE**. The contacts log record AND corresponding progress note (if applicable) are deleted, and the updated *Individual Contacts Log Editing Index* page is displayed.

The process of deleting a contacts log record is now complete.

VIEWING CONTACTS LOG REPORTS

AWARDS provides users with a variety of contacts log reports designed to meet the most basic or detailed reporting needs:

- Viewing a Basic Contacts Log Report - Page **5**
  The "basic" contacts log report contains individual detail and summary information for contacts that took place during a specified date range.
- Using the Contacts Log ReportBuilder - Page **8**
  The Contacts Log ReportBuilder is used to generate user-customized reports of basic client demographics and detailed client services as recorded in the Contacts Log.

VIEWING A BASIC CONTACTS LOG REPORT

The contacts log report mode enables users to view a read-only report of contacts log information selected based on a variety of criteria.

The contacts log report can also be generated using the Services module Utilization Reports feature, or from within the Report Menu module.

To view a contacts log report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Consumer Services Menu* page is displayed.

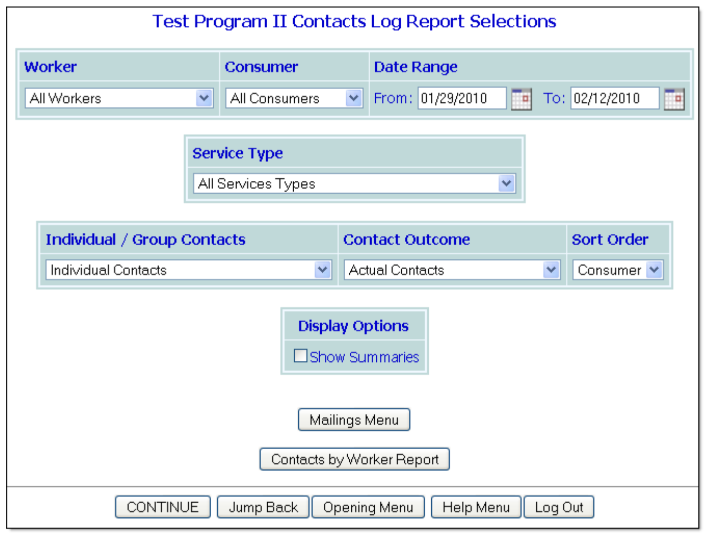
2. Click the **Program** drop-down arrow and select the program or program type associated with the report to be viewed.

3. Click the **Database** drop-down arrow and select "Reports."

4. To limit report selection by consumer name, click the **A-Z** drop-down arrow and select the consumer's last name initial. An asterisk (*) in this field will include all consumers in the report selection process.

5. If the report to be viewed is for a former (discharged) consumer, click the **Roster Archives** check box.

6. Click **Contacts Log**. The *Contacts Log Report Selections* page is displayed.



7. To limit report select by worker (the person who recorded contact with the consumer), click the **Worker** drop-down arrow and select the worker. The default value is "All Workers."

   If the Roster Archives option was selected on the Consumer Services Menu page, "All Workers" must be selected here.

8. Click the **Consumer** drop-down arrow and select the consumer for whom the report is to be viewed. The default value is "All Consumers."

9. To limit the report's contents by date so that only contacts which occurred during a specific time period are included, type a date range in the **Date Range From** and **To** fields (using mm/dd/yyyy format), or click the calendar icon next to each field and select the dates.

10. Click the **Service Type** drop-down arrow and select the service(s) to be viewed in the report. Available selections may include:

All Services Types	Housing
Empowerment and Self Help	School and Training Opportunities
Problem Solving	Daily Activities
Work Opportunities	Health
Wellness Self-Management and Relapse Prevention	Money Management and Entitlements
Family Life and Social Relationships	Medication Support
Integrated Treatment for Substance Abuse	Service Planning and Coordination
Engagement	Other Service Type

The Service Type drop-down list may not appear for all agencies and programs. If you would like this option turned on, please contact the Help Desk or your Senior Project Manager.

11. Click the **Individual/Group Contacts** drop-down arrow and make a selection to indicate the type of contacts to be included in the report. Available options are:

Individual Contacts	Group Attendance Contacts
Individual and Group Attendance Contacts	Collateral Contacts
Individual and Collateral Contacts	Group Attendance and Collateral Contacts
All Contacts	

Group attendance information that is reflected in the report is pulled from both group contacts recorded using the Group Notes feature in the Services module and Activities records (which are not associated with a service type or writer).

12. Click the **Contact Outcome** drop-down arrow and make a selection to indicate the outcome of those contacts to be included in the report. Available options are:

Actual Contacts	Attempted Contacts	Actual and Attempted Contacts

13. Click the **Sort Order** drop-down arrow and make a selection to indicate how the contacts log records are to be displayed in the report. Available options are:

- **Consumer** – When this option is selected, contacts log report information is sorted alphabetically by consumer name.

- **Worker** - When this option is selected, contacts log report information is sorted alphabetically by worker and consumer based on each worker's caseload.

- **Date** - When this option is selected, contacts log report information is sorted by date of contact, with the most recent contacts listed last.

14. Click the **Show Summaries Only** check box if the report is to only display the summary line from each consumer record.

15. Click **CONTINUE**. The contacts log report is displayed on the *Contacts Log Report* page.

The contents of this read-only report are based on the selections made on the previous pages; however, all contacts log reports contain the following information: consumer name, contact date, length (minutes), service type, and worker name.

The report flags time overlaps for contacts entered when sorted by either client or worker. Times that overlap with another contact appear in bold red font with an exclamation point (!) next to the **Time of Contact** for both face-to-face and non face-to-face contacts. When the report is sorted by client, the report flags any contacts with overlapping times, assuming *clients* should not be receiving more than one contact at a given time. Likewise, when the report is sorted by worker, the report flags any contacts with overlapping times, assuming *workers* should not be making more than one contact at a given time. In order to see all overlaps, whether they relate to clients or workers, the report should be run twice using those two sort options.

Contacts log reports also contain statistics on the total number of contact hours, contacts, and notes for each consumer, worker, or date, as well as the overall total number of contact hours, contacts, and progress notes.

When the report is sorted by Consumer, the summary line also includes the total number of workers who provided the contacts, the total number of onsite face-to-face contacts located at "This Program Site" and the total number of offsite face-to-face contacts provided at any other site. (Group notes and group activities attendance will be reported in the "onsite" category.) Any contacts for which there is no location selection, or for which the location is N/A, are recorded at the bottom of the report in the "Location Overall" totals as location "None."

A "Yes" in the Note Attached column in the contacts log report indicates that there is a corresponding progress note for that contact.

The process of viewing a contacts log report is now complete.

USING THE CONTACTS LOG REPORTBUILDER

To create and save a Contacts Log ReportBuilder report that can be re-run in the future, to generate a single-use report, or to use and/or update an existing report format to generate a report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Services**. The *Client Services Menu* page is displayed.

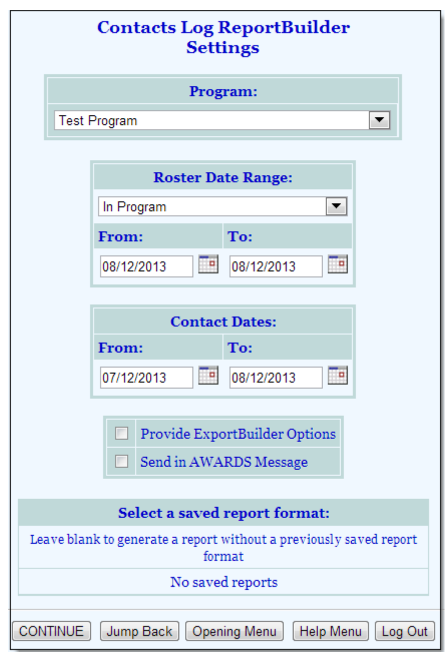
2. Click the **Program** drop-down arrow and select the individual program for which the report is to be run, or select a group of programs using one of the available "All" selections.

3. Click the **Database** drop-down arrow and select "Reports."

4. Click **Contacts Log**. At this time the *Contacts Log Report Selections* page is displayed.

   The report settings on this page are not applicable to the ReportBuilder, and can be left at their default values.

5. Click **Contacts Log ReportBuilder**. The *Contacts Log ReportBuilder Report Settings* page is displayed.



6. Report contents are limited to records for clients who were on the roster of the selected program at some point during the date range specified using the **Roster Date Range** fields on this page.

   By default both Date Range fields contain today's date to include in the report only those clients on the current roster. If necessary, make changes to that default range using the available **From** and **To** fields/date pickers.

   In the event that you are creating a new contacts log report that will be saved, please be aware that the date ranges specified here are not saved with the report. They must be set each time the report is run.

7. For the clients included in the report, contents are limited to contacts log records for those services provided in the selected program(s) at some point during the date range specified using the **Contact Dates** fields on this page.

   By default, the Contact Dates date range is set for the last month. If necessary, make changes to that default date range using the available **From** and **To** fields/date pickers.

8. Leave the **Provide ExportBuilder Options** check box *unchecked*. It is NOT relevant to report generation.

   This option is used to provide access to an ExportBuilder corresponding to the ReportBuilder with which you are working. AWARDS ExportBuilders - which are designed for use by individuals who are familiar with export files and formats, their design, and setup - harness the power of ReportBuilder functionality and take it a step further to meet a variety of outside reporting needs. With ExportBuilders users can create customized data *reports as they would in the ReportBuilder itself, and from those reports generate export files of a number of different types - CSV, TXT, XLS, or XML. Exported files can be saved to your computer, then uploaded into other data collection systems and/or worked with in other applications as needed. Additionally, as can be done with ReportBuilders, ExportBuilder formats can be saved and shared for future use.*

The instructions provided in document detail use of the Contacts Log ReportBuilder only, not the corresponding ExportBuilder. For more information on using ExportBuilders, please refer to the corresponding portion of Online Help, or to the ExportBuilder Basics instruction sheet.

9. If you would like the report to be sent to your AWARDS Messages module upon its completion, click the **Send in AWARDS Message** check box. When this option is selected you need not wait for the report to generate, and can navigate away from the ReportBuilder after finishing the configuration process (in step 11 or 21). Once the report is ready for viewing, it is sent to you in the body of a message accessed via your Messages module inbox. Report messages received in this way also include a Zip file attachment containing an Excel spreadsheet copy of the report data.

   Using this option, the report you generate can be retained in the Messages module for reference at a later time, and the report content can easily be distributed to other users via message forwarding. Additionally, this option can be a time-saver when working with reports containing large amounts of data that might otherwise take a while to display in AWARDS.

10. Use the **Select a saved report format** drop-down options at the bottom of the page to specify whether you will be generating the report from scratch or using a previously saved format. Available choices are to:

    - **Use a previously saved report format –** To generate the report using a previously created and saved format, select that format from this drop-down. When using this method, you can immediately generate the report without changing any settings. Alternately, you can first review and modify the settings of the format by checking off the available **Provide option to modify settings of saved report format** check box.

    - **Start from scratch, without using a previously saved report format –** To create your own report format for single-time use or for saving and later re-use, leave the saved report format drop-down *blank*.

11. Click **CONTINUE**.

    If you are using an existing report format and have NOT chosen to view/modify the settings of that format, you are now taken directly to the report page. Continue with step **22**.

    If you chose to send the report to yourself via the Messages module (in step 9), a notice is first displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report to complete and then proceed with step ***22****.*

    In all other instances, the *Contacts Log ReportBuilder Options* page is displayed.

    This page contains a list of demographic and contacts log record variables, grouped by information type. These variables represent data collected in the following AWARDS locations:

Intake Form	Face Sheet	Basic Contacts Log

Some variables not necessarily found in the above records are also available; for example, "Age" and "Client ID."

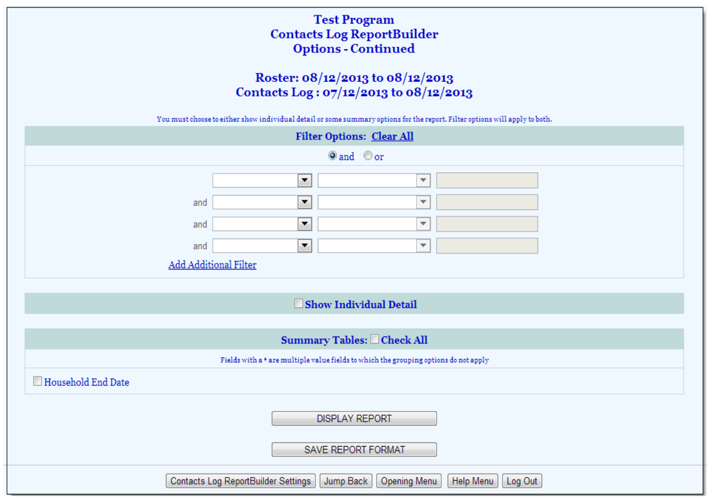
Continue with step **12**.

12. The Contacts Log ReportBuilder report will include all clients who were enrolled in the selected program(s) at some point during the date range specified in step 6. In some cases, that may result in duplicate report records in instances where a client has multiple histories in a single program, or a history in multiple programs. To filter out those duplicates and list each client only once in the report results, click the **Unduplicated Client Count** check box.

    When this option is selected, the report contents are limited to the most recent contacts log record for each included client. In instances where there are multiple contacts with the same date and time, only one of those service contact records is included.

13. Click the check box next to each client or service contact characteristic for which data is to be included in the report, and/or use the available **Check All** option for each type of data as needed.

14. Click **CONTINUE**. The *Report Options – Continued* page is displayed.



15. Configure the options in the "Filter Options" portion of the page as necessary to adjust the scope of the report contents. Set the "Show Individual Detail" and/or "Summary Tables" options to adjust the way in which the contents are displayed.

    Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various report options, please refer to the ReportBuilder Basics *instruction sheet, or AWARDS Online Help.*

16. To save the report settings so that this contacts log report can easily be re-run in the future, click **SAVE REPORT FORMAT**. The *Save Report Format* dialog box is displayed.

    *If it is not necessary to save the report format and you only wish to view the report contents, please skip to step **21**.*

17. In the **Report Format Title** field, type the name of the report.

    We recommend that the title used be indicative of the report contents so that it is easily identifiable when selecting the format for the purposes of running the report in the future.

18. Click one of the available **Save Report Format for** radio buttons to determine who the report should be accessible by. Available options are:

    - **Yourself –** When this option is selected, only the user saving the report format has the ability to use or modify that format.

    - **All Staff –** When this option is selected, all staff in the program(s) selected in step 2 have the ability to view the report; however, only you and other individuals with the ability to save reports for all staff will be able to modify or delete that format.

In a single-agency AWARDS database, only members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by others. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

19. Click one of the available **Allow Report Format for** radio buttons to determine which programs this report format can be used for. Available options are:

    - **This Program –** When this option is selected, the report format being saved is available for use only by the program selected in step 2.

    - **All Programs –** When this option is selected, the report format being saved is available for use by all programs, regardless of which program was selected in step 2.

    The Allow Report Format for options are only available when a single program was selected in step 2; otherwise, the format is saved for all programs by default.

20. Click **Save Report Format**. The report format is saved and the *Report Options – Continued* page is re-displayed.

21. Click **DISPLAY REPORT**. The report is generated and displayed on the *Contacts Log ReportBuilder* page.

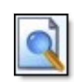
    When working with the report data, please keep in mind that:

    - *If the "Unduplicated Count" option was selected in step 12, only the most recent contacts log record for each of the included clients is displayed.*

    - *When a report is long enough to require you to scroll down the page to view all of its content, the header row of the data table (individual detail and/or summary) "freezes" at the top of the page, while the rest of the report detail is viewed. This enables you to view the column labels, even when scrolling down the page. Similarly, when printing a report that covers more than one page, the header row of any tables split between pages is shown at the top of each page.*

    - *If you chose to send the report to yourself via the Messages module (in step 9), a notice is first displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report to complete and then proceed with step* ***22.***

22. At this time, individual detail and/or summary table content can be hidden or sorted as needed. The report can also be printed or exported to Microsoft Excel. For more information on working with ReportBuilder report contents, please refer to the ReportBuilder Basics instruction sheet, or AWARDS Online Help.

    The magnifying glass preview icon on the report page can be used to view the contact log record from which a specific row of report data was pulled. Clicking the icon for a contact log record with no associated progress note displays that contact in report mode. Clicking the icon for a contact log record with an associated progress note displays that progress note in report mode instead. In all instances the record is opened in a separate browser window. Be sure to close that window when viewing is complete.

The process of generating a Contacts Log ReportBuilder report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the Contacts Log feature can be a useful reference when you have your own questions about the functionality.

ARE GROUP CONTACTS COUNTED AS F2F OR NON-F2F IN THE CONTACTS LOG REPORT?

Though group notes do not have "F2F" next to them on the contacts log report, they are being counted as face-to-face time by default. That face-to-face time will be included in the "Total F2F Contact Hours" summary data at the bottom of the report.

CAN A START TIME BE SPECIFIED WHEN ENTERING CONTACTS LOG RECORDS?

The basic contacts log setup (as opposed to the supportive services checklist) does not include the option for recording start time; it is intended to capture aggregate contact throughout the day. Specifically, the basic contacts log is not meant to record a start time because you cannot have more than one contacts log entry per day.

HOW DO I BACKDATE A CONTACTS LOG RECORD?

The "Backdated Contacts Log/Group Notes Data Entry" permission assigned using the System Setup module Permissions Maintenance feature is required in order to backdate contacts log records.

HOW DO I CALCULATE THE TOTAL NUMBER OF CONTACTS IN A DATE RANGE, INCLUDING THOSE FOR CLIENTS WHO HAVE SINCE BEEN DISCHARGED?

The total number of contacts can be calculated using the Contacts Log feature in report mode. Run the report for "All Workers," "All Consumers," and the date range you are collecting data for. If will give you a list of all the contacts within that date range, and will include the contacts in that period for all clients regardless of whether or not they were discharged during or after the end date used.

HOW DO I EDIT A BACKDATED, LOCKED CONTACTS LOG ENTRY THAT CONTAINS A PROGRESS NOTE?

In order to backdate contacts log entries that contain notes, users must have both the "Backdated Contacts Log/Group Notes Data Entry" and "Backdated Progress Notes Data Entry" permissions. Unless a user has both of those permissions, the backdated contacts log records will remain locked.

If you have the necessary permission and the note is still locked, it may need to be manually unlocked before it can be edited. For more information on unlocking, please refer to the "How do I unlock a locked contacts log record" frequently asked question below.

HOW DO I PRINT THE CONTACTS FOR A TERMINATED EMPLOYEE WHO IS NO LONGER IN THE CONTACTS LOG WORKER SELECTION LIST?

Contacts entered by an employee prior to his or her termination can be printed by running the contacts log report for "All Workers" for a specific date range and the "Worker" sort by option. Within the report contents all of the terminated employee's contacts will be grouped together for you to review and print as needed.

HOW DO I UNLOCK A LOCKED CONTACTS LOG RECORD?

If a contacts log entry has been locked as a result of an associated progress note being locked, both can be unlocked if the user has the "Unlock Contact Log" exception override permission (assigned using System Setup > Permissions Maintenance).

Progress notes may be automatically locked based on the program's Note and Contact Editing Rules under System Setup > Business Rules, or manually locked because the user has clicked the sign off note check box at the bottom of the Progress Notes Composition page.

To allow users with this permission to complete the unlocking process, an "Unlock" link is listed next to any locked contacts log records in the contacts log index in data entry mode. Click the link to unlock the contact and associated progress note. When prompted, click **OK** to confirm the unlocking. The index page is then re-displayed, and the contacts log record in question will no longer be displayed as locked.

This permission does NOT allow electronically signed progress notes to be unlocked. Only contacts with progress notes that have been locked but not electronically signed can be unlocked at this time.

Contact/progress note unlocking is recorded in the audit trial, located under System Setup > Login Maintenance > Audit Trail.

WHEN USING SURROGATE DATA ENTRY, WHOSE PERMISSIONS ARE IN EFFECT?

While the surrogate data entry permission gives a user the ability to access/edit contacts log records as another worker, the user does not take on that worker's permissions. The user will be limited by their own permissions, even though working with the record as someone else.

WHY DOES THE WORKER SETTING ONLY CONTAIN "ALL WORKERS" WHEN RUNNING A CONTACTS LOG REPORT WITH THE ROSTER ARCHIVES OPTION SELECTED?

The Roster Archives option applies to clients rather than workers; therefore, the Worker drop-down selection list is limited to "All Workers" by design.

WHY DOESN'T THE CONTACTS LOG REPORT REFLECT GROUP NOTES WRITTEN FOR "NO SHOWS?"

In general, the system is not set up to report on things that didn't happen and as such, groups for which an attendee was a no show will not be included on the contacts log report. In order to gather no show information, you must review the contents of the group notes report instead.