Contact Lapse Audit Report

AWARDS INSTRUCTION SHEET

The "Progress Note Lapse Audit Report" located in the Services, Utilization Reports feature has been renamed the "Contact Lapse Audit Report," and will now offer more reporting flexibility. The report is now capable of reporting the last date of contact for a client, taking into consideration progress notes, contacts logs and group notes written. Additional fields have also been added to the report, as described in this document.

Permissions required to access the Utilization Reports feature and view the Contact Lapse Audit Report are as follows:

- *CHART ACCESS – You must have chart access permission for each program for which the report is to be viewed.*
- *DATA ENTRY / ACCESS – The report is accessed from within the Services module. In order to see this module on your AWARDS Opening Menu page, you must have the "Display Chart Records Services Button," and "Display Any Chart Records Buttons" data entry/access permissions.*

ABOUT THIS DOCUMENT

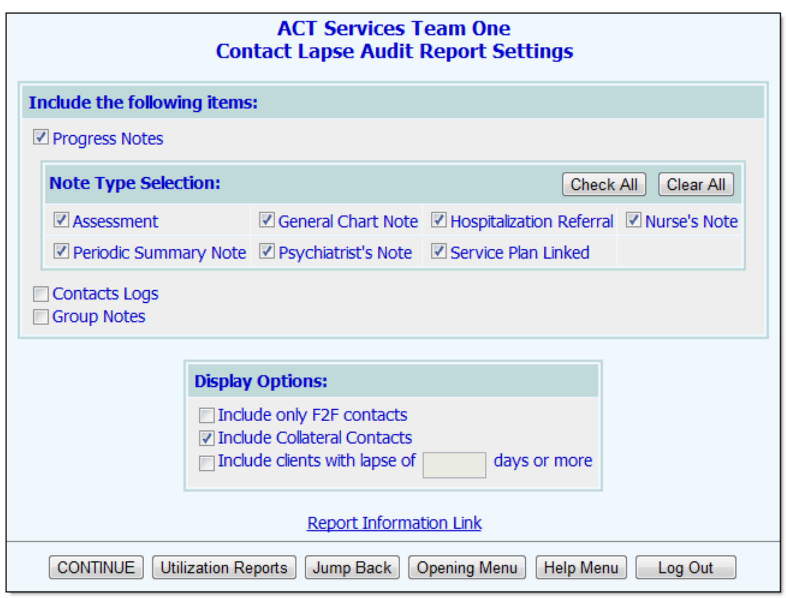
This document is intended to guide you through the process of viewing the Contact Lapse Audit Report. Specific topics covered are:

- Viewing a Contact Lapse Audit Report – Learn how to view and interpret the report. Page **1**
- Frequently Asked Questions – Review answers to common contact lapse audit report questions. Page **3**

VIEWING A CONTACT LAPSE AUDIT REPORT

To view a contact lapse audit 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 for which the report is to be viewed.
3. Click **Utilization Reports**. The *Services Utilization Reports* page is displayed.
4. Click **Contact Lapse Audit Report**. The *Contact Lapse Audit Report Settings* page is displayed.



5. In the "Include the following items" section of the page, check the check box(es) next to the type(s) of contacts you would like included in the report.

   "Progress Notes" is checked by default. When checked, a list of all progress note types is also made available for filtering purposes. If necessary, check/uncheck any combination of note types as needed, keeping in mind that when filtering by note type the report only counts selected types when considering a client's last contact.

   Other contact types available for inclusion in the report are "Contacts Log" and "Group Notes."

6. In the "Display Options" section of the page, check the check box(es) next to the items you wish to include in the report results:

   - **Include only F2F contacts** – By default, the report counts both face-to-face and non face-to-face contacts. When this box is checked, the report will only count face-to-face contacts when determining the last contact for a client. All group notes are considered face-to-face, and collateral contacts are never counted as face-to-face. Due to this second rule, when this option is checked, the "Include Collateral Contacts" option is disabled.

   - **Include Collateral Contacts** – This option is checked by default, and when checked the report will count any collateral contacts when determining the last contact for a client. Uncheck this box if you do not wish to have these types of contacts counted.

   - **Include clients with lapse of _____ days or more** – When this option is selected and a number of days is entered in the available days field, the report will only include clients with a lapse period greater than or equal to the number specified. For example, if running the report with this option checked and set to "10" days, the report excludes any client with a lapse period of 9 days or less.

7. Click **CONTINUE**. The Contact Lapse Audit Report is displayed and contains the following information:

   - **Service Coordinator** – Based on the report settings selected, the report will display the latest contact date with the client by the assigned service coordinator. The service coordinator's name appears in this field, if applicable.

   - **Consumer** – The consumer's name is displayed here.

   - **Last Contact** – This lists the last date of contact found in the system, based on the types of contacts selected on the report settings page. All selected contact types are included in the report, regardless of the contact length or whether they were categorized as face to face or not.

   - **Lapse** – Based on the report settings selected, if any contact is found for the consumer this column displays the number of days from the last contact till today. If no contact has been found, this will display the number of days since the consumer's admission.

   - **NY/NY Eligible** – When applicable, this column contains an asterisk if the consumer is NY/NY eligible.

     This column does not appear for all programs/agencies.

   - **Hospitalized** – This column contains an asterisk if the consumer is currently hospitalized.

   - **No Notes** – This column contains an asterisk if no selected contact types have been entered for the consumer since his or her intake/admission.

   - **Unit** – When applicable, this will list the name of the unit the client is assigned to (i.e. in a clubhouse program).

This column does not appear for all programs/agencies.

- **Other Writer** – Based on the report settings selected, if the latest contact for the consumer was written by someone other than the assigned service coordinator, that staff member's name is displayed in this column. In these instances, the latest contact with the consumer's assigned service coordinator will also be listed in a separate row of the report.

- **Contacts/Notes written within the past 15 days summary table** – The report also displays a summary table listing the number of contacts/notes written within the last 15 days for each service coordinator appearing in the report.

Clicking any of the column headers will allow you to sort the report in both an ascending and descending manner.

Both the main report and the summary table provide an option to show/hide specific columns on the report. This can be done by clicking the **Show/Hide** icon in the upper-left corner of the table, and then checking/unchecking the respective column titles.

The process of viewing a contact lapse audit report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the contact lapse audit report can be a useful reference when you have your own questions about the functionality.

DOES A CONTACT HAVE TO BE A CERTAIN DURATION OR SET TO FACE-TO-FACE TO BE COUNTED AS A CONTACT ON THIS REPORT?

This report does not exclude contacts based on their duration. Every contact meeting the report settings specified on the *Contact Lapse Audit Report Settings* page is included, regardless of duration. Likewise with face-to-face notes which are always included in the report if they meet the report settings. Contacts that are *not* face-to-face may or may not be included based on how the "Display Options" settings for the report are configured.