TRAC-IT concerns and recommendations expressed by CoCoA:

1. Systems are experiencing multiple difficulties with various steps in the process for the children who migrated from ITOTS to TRAC-IT. Trainings, the User Manual, and the Quick Reference Guides did not include information about how to do Day 1 tasks for children who were migrated from ITOTS. Training only covered what to do with children starting from referral. Many systems are particularly struggling with the discharge process. Recommendation: SSG/DBHDS provide training directions (step by step) for Day 1 tasks for children who migrated from ITOTS to TRAC-IT. Systems are having significant difficulties navigating children in different stages of the process, including discharge, and there are many unanswered questions. It is much more efficient to offer training for everyone across the state at once rather than have individual users either spend time trying to figure out processes or contacting the Help Desk.

Response:

*Based on Help Desk tickets, many of the difficulties local systems are experiencing with children who migrated from ITOTS to TRAC-IT are due to errors in the spreadsheets submitted by local systems prior to go-live and/or errors in ITOTS data entry with the subsequent need to correct that data in TRAC-IT. Assuming the data is correct, the workflow is the same for children who migrated as it is for those whose referral was entered in TRAC-IT (though you are starting at a different point in the flow). Since the workflow and tasks themselves work the same way regardless of whether the child’s data migrated from ITOTS or the referral was entered in TRAC-IT, the steps covered in the manual, quick reference cards and trainings still apply. To assist local systems as they get through the initial learning curve and “catch-up” those children who migrated from ITOTS, we are doing the following:*

- **Reducing Requirements:** For children who migrated from ITOTS and will turn three or transition to Part B on or before 9/30/22, you do **not** need to enter any updates to their service plan or insurance as long they have at least an initial service plan and the minimum required insurance information in TRAC-IT. You will only need to complete the discharge tasks (including exit assessment data) for these children as they exit Part C.

- **Adding Office Hours:** We will hold office hours on July 27, 8:30AM-10:00AM, to address questions related to the workflow for children who migrated from ITOTS to TRAC-IT. This will be an open session to answer your specific questions about progressing migrated children forward in the workflow. Register at the following link: [https://attendee.gotowebinar.com/register/840436326371974926](https://attendee.gotowebinar.com/register/840436326371974926)

- **Writing a Guide:** We are developing a companion document for the recorded Day 1 Entry Walkthrough. The document will provide the timestamp for each topic/TRAC-IT task covered so users can easily access the walkthrough of the task they are seeking to understand.

- **Tips on Discharge:** Based on questions frequently asked of the Help Desk, specific steps for discharging children who have an IFSP were provided in writing to all local systems on July 7th. SSG is developing a Quick Reference Card related to discharge that will outline steps for discharges that occur at various points in the workflow.
2. Systems report the private insurance information from the spreadsheets we spent time completing did not transfer in. In some cases, we have been told there were errors in the spreadsheets, but we were not given an opportunity to make corrections. Recommendation: Offer an opportunity to correct the import spreadsheets and have the data uploaded again rather than correct each item by hand in TRAC-IT.

Response:

With the exception of one local system, private insurance information transferred in unless there were errors in the spreadsheet. In order to allow local systems as much time as possible to complete the spreadsheets with the most current information possible, due dates for submitting the spreadsheets were very close to the launch date for TRAC-IT. As emphasized prior to spreadsheet submission, errors must be corrected directly in TRAC-IT. We recognize this will take some time. We have not set deadlines, nor are we monitoring this data or timely entry of this data.

3. Reasons for 45-day delay did not migrate from ITOTS to TRAC-IT. This is slowing the process down when trying to discharge children who were previously in ITOTS. It may be necessary to allow us access to ITOTS to view that data.

Response:

Our initial investigation indicates that the 45-day delay reasons were programmed to migrate, and SSG is running a check to ensure the migration logic ran correctly. If the IFSP did not import correctly due to errors in a spreadsheet, this may have blocked the reason from migrating (because there was not an IFSP date to trigger the reason). If you have an example where the IFSP information was correct on Day 1 but the 45-day timeline reason was not migrated from ITOTS, please submit a ticket to the Help Desk with the TRAC-ID so they can further investigate.

4. Training database (the Sandbox) has faults and doesn’t allow for records that were built in early June to proceed past the intake. This has created problems in local training capability and has resulted in more work at the local level to train staff adequately.

Response:

For those using the training environment, the Sandbox, to conduct local training or to practice, you will want to use records created on or after 6/17/22. You also may want to create your own new records for this purpose. If there are other faults in the Sandbox that are causing problems, please let the Help Desk know.

5. Systems experience slow responses at times to Help Desk queries. Some systems reported waiting more than a week for a response to emails. When calls are made, there are times messages have to be left. These delays add to the frustration at the local level and slow down our work in TRAC-IT. Recommendation: Provide additional support at the SSG Help Desk to ensure prompt replies on a consistent basis to questions.
From the local level, to the state office, to SSG, we are all moving through this initial implementation phase together. We appreciate your patience as the Help Desk responds to a large volume of questions and issues. We and SSG are monitoring response times, and there have been only 2 short periods when the average first response to an email or phone message took more than 24 hours.

We expect wait times will decrease as we move past this initial launch period. Some of the longer resolution times have occurred when the question/issue identified a bug in the system that required a fix or an investigation back through submitted spreadsheets or ITOTS data to identify errors. We expect fewer of these types of issues to surface moving forward. Also, to help ensure SSG Help Desk staff are aware of our policies and practices and that we (state Part C staff) are aware of the questions and issues coming into the Help Desk, many of the requests are forwarded to us for our approval before SSG makes a change. Now that we have a feel for the requests, we are issuing blanket approvals to the Help Desk for certain changes.

6. Issues exist with how to modify guardians when custody changes from parent to foster care and vice versa. Additionally, how to protect the foster parents’ identity when printing the IFSP is not clear. Recommendation: Help us with answers/resolutions to issues like those for children in foster care.

Response:

The ad hoc task for Update Child/Guardian Information can be used to modify information when there are custody changes. Options for sequestering records/information will be added as enhancements to TRAC-IT. Timelines for those added features are under consideration. In the meantime, you could use initials or fake names in TRAC-IT so actual names will not appear on print documents, or you could choose to use forms outside of TRAC-IT since these are not required in TRAC-IT until 11/15/22.

7. The IFSP structure was changed in TRAC-IT without concurrent training on how to implement the changes. Recommendation: Provide training to local systems so we understand the expectations the Part C office has for the revised IFSP.

Response:

Although there were some changes to the layout of the IFSP, there were not significant substantive changes. We are preparing a new IFSP form that those who are not completing the IFSP in TRAC-IT could use in order to become familiar with the layout and fields prior to full implementation of TRAC-IT starting 11/15/22. Using the new form between now and November will be optional. We also are happy to plan a webinar to review the changes with the field.

8. Notification that a referral was made is not provided; one is required to log in and then look for it. Recommendation: Establish a notification mechanism for referrals entered in TRAC-IT similar to the email notification we get from VISITS. If that is not possible, then create a notification that pops up when we get to the dashboard.
Response:

We will add these notification suggestions to our list of potential enhancements for TRAC-IT. In the meantime, checking the system for referrals can be handled much like checking for voicemails, faxes, etc. that may have referrals.

9. The TRAC-IT Webinar recordings have no index to find specific questions and answers, and few of us have the time to listen again to multiple long webinars to get answers to our questions. All training webinars need some sort of index so we can find answers quickly.

Response:

We are developing a companion document for the recorded Day 1 Entry Walkthrough. The document will provide the timestamp for each topic/TRAC-IT task covered so users can easily access the walkthrough of the task they are seeking to understand. We also encourage you to reference the User Manual, which has a detailed, hyperlinked table of contents, and the Quick Reference Cards. If you still have questions, please contact the Help Desk.

10. Transferring records between local systems is not as smooth as was presented and requires the sending system to initiate a referral and type in duplicate data. In addition, the User Manual has a transfer between systems as “re-enrollment.” There is not enough detail in this section. Additionally, if you transfer a child whose IFSP is more than 6 months old, TRAC-IT will require you to go back through eligibility even though they have an active IFSP. Recommendation: Correct the transfer process (“re-enrollment”) so we have more detail on the process and so the sending system does not need to type in duplicate data, including adding eligibility information.

Response:

The scenarios we are seeing through the Help Desk where there is a need to re-enter data for transfers are due to errors in data that were imported through the spreadsheets. When data is correct, there is no need to re-enter data or repeat steps.

The logic in TRAC-IT is built to require you to go back through eligibility and other steps in the workflow only if it has been 6 months or more since the child was discharged (not since the IFSP date). This logic worked correctly during User Acceptance Testing. If you have an example of where the 6 months was based on the IFSP date rather than the discharge date, please submit a ticket to the Help Desk and provide the TRAC-IT ID number.

We have shared with SSG the request for additional detail in the relevant section of the User Manual.

11. Institute ongoing, weekly Office Hours to assist systems with the transition to TRAC-IT, to include an index of topics that were addressed when each Office Hours webinar is posted on the website. Office Hours should include training based on Help Desk tickets so all of us can learn the answers to questions that are being asked by others around the state – because at some point we will likely have the same questions too. Maintaining Office Hours through at least November and beyond, if possible, will help make this transition run more smoothly.
Response:

We held Office Hours twice during the week TRAC-IT launched, and both sessions had fewer than 5 participants. One of the two sessions had no questions asked. Based on that lack of use and the fact that it takes SSG staff away from the Help Desk, we have opted not to hold weekly Office Hours. However, we will continue to assess the need and hold targeted sessions. As indicated in response to #1, an Office Hours session has been scheduled for July 27 to address questions related to migrated data.

We are sending a weekly email to all local system managers, contract agencies and independent practitioners with tips, reminders and updates based on common questions and issues from the Help Desk.

12. Because TRAC-IT is going to be such a key component of our EI system in Virginia, we recommend the TAs and Monitors be trained as “Super Users” (unless they are already) so they are very familiar with how TRAC-IT works and can be an ongoing support to local systems. Their knowledge will also be helpful when TRAC-IT is discussed during regional meetings.

Response:

The Help Desk will always be the primary source of support for TRAC-IT users. This ensures consistent answers and our ability to have dashboards and data regarding questions, response times, etc. All Part C staff have completed the Overview training and most have completed the other trainings offered as well. We are in the process of planning some additional training for TAs and Monitors to continue building their general familiarity with TRAC-IT. That will help TAs and Monitors support local systems in thinking about their local processes and changes that may be necessary to align with the TRAC-IT workflow.

13. Reporting functions like what we had in ITOTS (plus more) need to be in TRAC-IT as soon as possible. We would like to have input into the reporting functions we need to manage our local systems.

Response:

Whereas the only way to see and use data in ITOTS was with reports, TRAC-IT will provide data via dashboards, extracts and reports. As indicated during training sessions, TRAC-IT launched with just the basics. Partly this was because such limited data was being required in TRAC-IT on Day 1 that many potential dashboards, extracts and reports would have little data or use. It also was because we wanted to get input from the field on what they would use and this input would be better informed once users were familiar with the system. Some users have already sent their requests to the Help Desk, and others are welcome to do the same. We will ask for additional ideas and have a user group assist us in reviewing those ideas before making final decisions about additional dashboards, extracts and reports.

14. Allow systems to check data in ITOTS to assist with updating data on migrated children in TRAC-IT

Response:
ITOTS has been decommissioned. Although we have access to the data that was in ITOTS, local systems cannot go back into ITOTS itself. If it is determined, in conjunction with the Help Desk, that there is a specific situation that necessitates access to ITOTS data, we will facilitate that happening.