“Visit” Tab/“Contact Log” Tab Integration Feature
This document is a description of the “Visit” tab/”Contact Log” tab integration feature located under the “Visit” tab in BTOTS.

How to Integrate Visits and Contact Log Entries on the “Visit” Tab
On the “Visit” tab, a user can now select the “Include Contact Log Entries” checkbox to view visits and contact log entries simultaneously, as shown in Figure 1. The checkbox must be checked for the contact log entries to be displayed on the “Visit” tab.

Figure 1. “Include Contact Log Entries” Checkbox
Contact Log Entries NOT Available When “Visit” Tab Filters Changed Under “Setting/Service” or “Status”

The “Visit” tab/“Contact Log” tab integration is available when the “Include Contact Log Entries” checkbox is marked. The user may select filters for “IFSP,” “On or After,” and “On or Before” and still see the contact log entries integrated with visits. However, if a user selects from the “Setting/Service” or “Status” drop downs, the “Visit” tab/“Contact Log” tab integration will not be available, as shown in Figure 2.

Figure 2. Contact Log Entries NOT Available when “Setting/Service” or “Status” has a Filter Selected
How Contact Log Entries are Displayed on the “Visit” Tab

An icon representing the type of contact made, e.g., email, phone call, etc., (see Figure 4) and the date of the contact will now appear between visit entries based on the date of the contact log entry. Contact log entries with the same date as a visit appear above the visit entry. The user can also hover over the contact log entry date to view an abbreviated description of the contact log entry, as shown in Figure 3.

Figure 3. Contact Log Entry Hover

![Contact Log Entry Hover](image)

Figure 4. Contact Log Types and Their Associated Icons

<table>
<thead>
<tr>
<th>Contact Log Type</th>
<th>Associated Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td>3/18/2015,</td>
</tr>
<tr>
<td>Mail</td>
<td>3/18/2015,</td>
</tr>
<tr>
<td>Email</td>
<td>3/18/2015,</td>
</tr>
<tr>
<td>Text</td>
<td>3/18/2015,</td>
</tr>
<tr>
<td>In-Person</td>
<td>3/18/2015,</td>
</tr>
<tr>
<td>Fax</td>
<td>3/18/2015,</td>
</tr>
<tr>
<td>Other Contact Type</td>
<td>3/18/2015,</td>
</tr>
</tbody>
</table>
Viewing a Complete Contact Log Entry from the “Visit” Tab

To view the complete contact log entry from the “Visit” tab, the user will click on the contact log date. A pop-up window will then open with the complete contact log entry information, as shown in Figure 5. (Note: the user can only look at one contact log entry at a time from the “Visit” tab. To view another contact log entry, the user must close the pop-up window and click on a different contact log entry to view the information.)

Figure 5. Contact Log Entry Information
“Edit” Contact Log Entry
The contact log entry cannot be edited in the “Visit” tab. To edit a contact log entry, the user must close the contact log entry pop-up window on the “Visit” tab and then go to the “Contact Log” tab and select the “Edit” button, as shown in Figure 6.

Figure 6. “Edit” Contact Log Entry on “Contact Log” Tab

Printing the Integrated Visit/Contact Log Entry List
As with all “Print View” options in BTOTS, the “Print View” option on the “Visit” tab will show all information on the screen at the time the “Print View” is selected. To print a list of contact log entries integrated with visits, the user will select “Print View” with the “Include Contact Log Entries” checkbox selected, as shown in Figures 7 and 8.
Figure 7. Select “Print View” with the “Visit” Tab Filters Set to “All” and “Include Contact Log Entries” Selected

Figure 8. “Print View” of Visits with Contact Log Entries