

Salt Lake County

# UWITS Tip Sheet

## Encounter Notes

Billable

Miscellaneous

Encounter Notes

This tip sheet outlines the procedures to document treatment encounters, services provided by treatment, progress notes and miscellaneous notes.

Total Pages: 8



UWITS

## Notes

### Encounters

**Background:** This module allows you to document client service encounters.

**1. Entry Steps:** Client List, select client, Admission/Enrollment, Activity List.

**2. Encounters:** To enter an encounter for a client (e.g. individual counseling, etc.) Click **Encounters** from the left menu bar, click the **Add Substance Abuse Encounter**.

**Note:** **Export** will allow you to save your Encounter Notes to an Excel spreadsheet.

3. For SUD notes complete at all required system and agency fields.

Create "**Priority, Goal, Method Statements**" for each Dimension by clicking on "**Review**".

**Note:** Entering **Service** and **Start Date** will then load the Previous ASAM Severities and Statements from the last "Signed TXPlan".

4. Click **Next** to advance to the next screen.

5. Address ASAM Treatment dimensions according to severity.

**Note:** **Severity Rating** of Med or High must be addressed before you can sign off an SUD TXPlan.

To access the Encounters module, click **Encounters** from the Left Menu Bar.

Click **Add Encounter** by type of treatment to enter a new Encounter Note.

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Domain	Status
	1/1/2016	90791 -MH Evaluation	1728	Westergard, Cory, SLCoOU	Mental Health	Mental Health	Not Released
	8/25/2015	90791 -MH Evaluation	1690	Westergard, Cory, SLCoOU	TEDS 99_2.5_GenAdult	Substance Abuse	Not Released
	8/13/2015	90834 - Individual Therapy 38 to 52 min	1668	Westergard, Cory, SLCoOU	Mental Health	Mental Health	Not Released
	7/21/2015	90791 -MH Evaluation	1679	Westergard, Cory, SLCoOU	Mental Health	Mental Health	Not Released
	7/12/2015	90832 - Individual Therapy 16 to 37 min (Crisis timeframe 16 to 30 min)	1666	Westergard, Cory, SLCoOU	TEDS 99_2.5_GenAdult	Substance Abuse	Not Released

**Treatment Plan/Encounter Notes**

Service: 90834 - Individual Therapy 38 to 52 min  
 Program: 7-Administrative Unit/TEDS 99\_1.0\_GenAdult : 2/16/2016 -  
 Start Date: 3/17/2016  
 Start Time: 8:00 AM  
 End Date: [blank]  
 End Time: 9:00 AM  
 Created Date: [blank]  
 Rendering Staff: Clinician, Cory, MIU  
 Billable: Yes  
 Duration: 60 Min

Dimension	Reload Previous ASAM	Priority, Goal, & Method Statement	Review
1 - Acute Intoxication and/or Withdrawal Potential	Severity Rating: Low as of: 12/13/2013	[text area]	<a href="#">Review</a>
2 - Biomedical Conditions and Complications	Severity Rating: Low as of: 3/28/2014	[text area]	<a href="#">Review</a>
3 - Emotional, Behavioral, or Cognitive Conditions and Complications	Severity Rating: Low as of: 3/28/2014	[text area]	<a href="#">Review</a>
4 - Readiness to Change	Severity Rating: High as of: 12/13/2013	By Westergard, Cory, SLCoOU 3/28/2014 11:21:09 AM: jkkkkkkkk	<a href="#">Review</a>
5 - Relapse, Continued Use, or Continued Problem Potential	Severity Rating: Med as of: 12/13/2013	By Westergard, Cory, SLCoOU 3/28/2014 11:20:36 AM: something	<a href="#">Review</a>
6 - Recovery / Living Environment	Severity Rating: Low as of: 12/13/2013	[text area]	<a href="#">Review</a>

Administrative Actions  
[Sign Treatment Plan](#)

# Notes

## Encounters - SUD Notes

**Background:** This module allows you to document client encounters and associated notes.

1. **Sign Notes:** Notes can either be signed or unsigned. To electronically append your notes to the encounter and make them uneditable (signed), type the progress notes in the **Unsigned Notes** box at the bottom, then click the **Sign Note** button.

**Note:** Once you click on **Sign Note** your note is stamped with your name, credentials and date. Then click on **Save**.

2. From here you can **Bill Service** if applicable.

3. Click **Save** or **Finish** after completing

Encounter Narrative 3/17/2016 -

Signed Notes

Signed by Clinician, Cory, MIU 3/17/2016 6:19:45 PM:  
Note for session

Release This Note? No [v] [Cancel] [Save] [Finish] [◀] [▶]

Unsigned Notes

Administrative Actions

**Sign Note** Bill Service

## Notes

### Billable - SUD Notes

- 1. Bill Service:** Only notes with a completed, saved, **Sign Note** can be **Released to Billing**.
- Only those who have **Billing Rights** can release to Billing.
- Notes can only be entered within the date range of the **Program** selected.
- Diagnosis** will populate based on the most recent Diagnosis entered as of the date of service.
- Add-On** codes should be entered according to the service provided.

### Release to billing

- The Group Enrollment dropdown reflects Client Profile>Payor Group Enrollments effective on the encounter date of service.
- Release to Billing can only be used if all yellow fields are Completed and the **Encounter Note** narrative is complete.

**Encounter Profile**

ENC ID 1666      Created Date 8/12/2015 1:31 PM

Service 90832 - Individual Therapy 16 to 37 min (Crisis timeframe)      Program 6-Administrative Unit/TEDS 99\_2.5\_G

Start Date 7/12/2015      End Date      # of Sessions 1

Start Time 8:00 AM      End Time 9:00 AM      Duration 60 Min

Rendering Staff Westergard, Cory, SLCoOU      Service Location Non-residential Substance Abu...

Diagnoses for this Service

Primary 310.1-Personality Change Due to... [Indicate the General Medical Condition](DSM IV) x

Secondary Select an option

Tertiary Select an option

**Add-On Services List** Add New Add-On

Actions	Service	Units

Administrative Actions

Cancel
Save
Finish

i The Client Group Enrollment dropdown reflects Client Profile>Payor Group Enrollments effective on the encounter date of service

**Release To Billing**

Client Group Enrollment

OPTUM Medicaid Group [OPTUM Medicaid 837]

Client Statements [Private Pay]

## Notes

### Billable - MH Notes

- 1. Bill Service:** Only notes with a completed, saved, **Sign Note** can be **Released to Billing**.
- Only those who have **Billing Rights** can release to Billing.
- Notes can only be entered within the date range of the **Program** selected.
- Diagnosis** will populate based on the most recent Diagnosis entered as of the date of service.
- Add-On** codes should be entered according to the service provided.
- The **NEXT >>** screen will capture the note of the service

Encounter 1 of 5

Note Type: Progress Notes

ENC ID: 1728 Created Date: 1/25/2016 3:44 PM

Service: 90791 -MH Evaluation

Parent Service:   
 Program Name: 3-Administrative Unit/Mental Health : 12/3/2015 - Billable: Yes

Service Location: Non-residential Substance Ab... Start Date: 1/1/2016

Start Time: 8:00 AM End Date:   
 End Time: 9:00 AM

Duration: 60 Min # of Sessions: 1

Emergency:

Diagnoses for this Service

Primary: F07.0-Personality change due to known physiological condition(ICD)

Secondary: F10.121-Alcohol abuse with intoxication delirium(ICD)

Tertiary: Z72.811-Adult antisocial behavior(ICD)

Rendering Staff: Westergard, Cory, SLCoOU

Supervising Staff:

Add-On Services List [Add New Add-On](#)

Actions	Service	Units

Administrative Actions

Cancel
Save
Finish
▶▶

# Notes

## Encounters - MH Notes

**Background:** This module allows you to document client service and association to Treatment Plan.

1. Use links [Add Goals](#), [Add Objectives](#), or [Add Interventions](#) to include Treatment plan information on the service note.

2. **Sign Notes:** Notes can either be signed or unsigned. To electronically append your notes to the encounter and make them read only (signed), type the progress notes in the Unsigned Notes box at the bottom, then click the Sign Note button.

**Note:** Once you click on [Sign Note](#) your note is stamped with your name, credentials and date. Then click on [Save](#).

3. From here a link for [Release to Billing](#) will be visible at the bottom of the screen if applicable.

4. Click **Save** or **Finish** after completing

The screenshot displays the 'Encounter Notes' interface. At the top, there is a 'Goal Progress' dropdown menu. Below this are three sections for adding information to the note:

- Add Goals:** A table with columns 'Actions', 'Goal #', 'Goal', and 'Description'. An 'Add Goals' button is in the top right.
- Add Objectives:** A table with columns 'Actions', 'Obj #', 'Objective', and 'Description'. An 'Add Objectives' button is in the top right.
- Add Interventions:** A table with columns 'Actions', '#', 'Intervention', and 'Status'. An 'Add Interventions' button is in the top right.

Below these sections are two text input areas:

- Signed Notes:** A large greyed-out text area.
- Unsigned Notes:** A large white text area.

At the bottom right, there is a control bar with an 'Allow Disclosure' dropdown set to 'No', and buttons for 'Cancel' (red), 'Save' (green), 'Finish' (blue), and navigation arrows. At the very bottom right, there are 'Add Note' and 'Sign Note' buttons.

# Miscellaneous Notes

## Notes

1. **Entry Steps:** Login, Select Facility, Client List, select client, Activity List.

2. From the Activity List, click **Notes**.

3. Click **Add New Misc. Note**.

4. Complete all system and agency required fields.

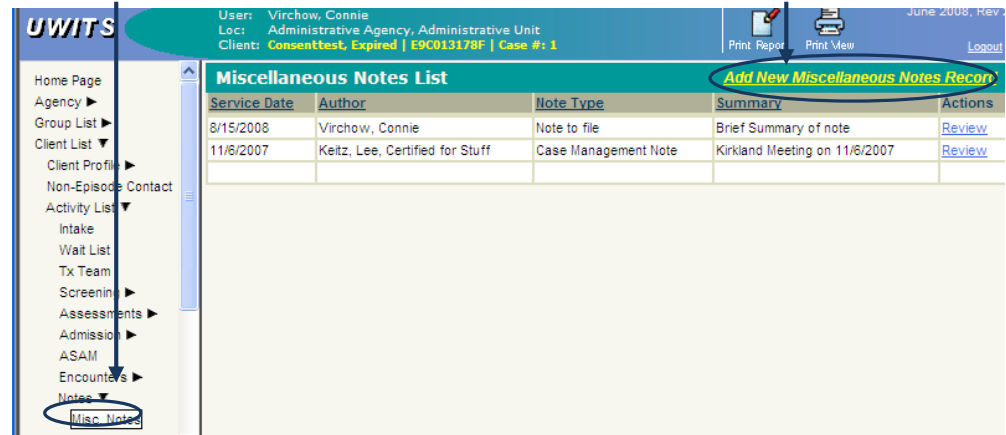
5. **Sign Notes:** Notes can either be signed or unsigned. To electronically append your notes to the encounter and make them uneditable, type the progress notes in the *Unsigned Notes* box at the bottom then click the **Sign Notes** button. **Note:** Please also remember to select the appropriate option on the **Release these Notes** drop-down (yes = you agree to share the notes with another agency in UWITS if your agency has an existing/current/active consent to share this client's treatment encounter).

6. Click on **Save** or **Finish**.

**Helpful Hint: A.** Use the Alert feature by clicking the **Alert** hyperlink to indicate if the client requires immediate follow-up. The client's name will appear in Red on the Client List if the Alert feature is used. **B.** You should check the Misc. notes to see the reason behind the alert. **C.** The Miscellaneous Notes screen becomes non-editable once you click **Save** or **Finish**.

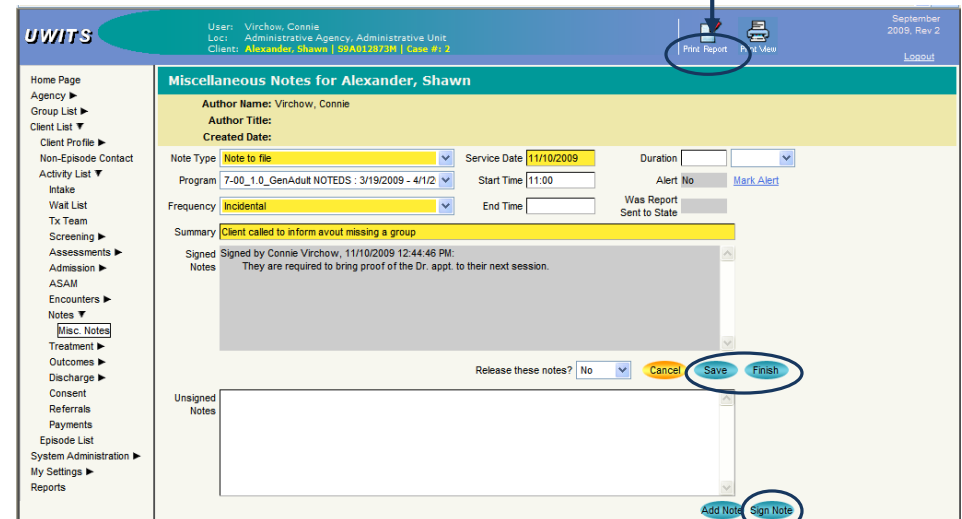
6. **Miscellaneous Notes Report:** After clicking **Save** and while you are still within the encounter record, single-click the **Print Report** icon to generate a report of the listed notes for this particular client.

To access Miscellaneous Notes, click Notes.



To enter a new Miscellaneous Note, click **Add New Misc. Note**.

To print a report of the Miscellaneous Notes for this client, click Print Report



Click Sign Notes to sign your notes. ↑

# Notes

## Print Notes

**Background:** This function allows you to generate all notes for a particular client, including the Encounters and the Miscellaneous Notes.

1. **Print All Notes:** From the Left Menu Bar, click **Notes** on to pull up the Notes List screen. This generates both the Encounters and the Miscellaneous Notes.
2. Click **Print Notes** at the top right.
3. Enter the desired date range in the Note Date field, and click **Go**.
4. Click **Export** to export your report in MS Excel or click **Finish** to return to the Notes List screen

Click, Print Notes to print all notes for this client, Encounters and Miscellaneous Notes.

Note Type	Date	Duration	Staff	Service/Summary	Actions
Progress Notes	1/1/2006	1 Hrs	Westergard, Cory	Behavioral health treatment se...	<a href="#">Review</a>
Case Management Note	1/1/2006		Westergard, Cory	Test referral and carryover of...	<a href="#">Review</a>

UWITS User: Virchow, Connie Loc: Administrative Agency, Administrative Unit Client: Wayne, Bruce | 89W020939M | Case #: 2 August 2010 Logout

Enter range of dates for notes (<Begin Date>:<End Date>)

Note Date:

Enter the date range, and click Go to generate a report.