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

K:\UWITS Documentation\UWITS Tip Sheets\UWITS Encounter Notes Tip Sheets 2016 March.docx
Date: June 15, 2016, Rev. 7

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"**

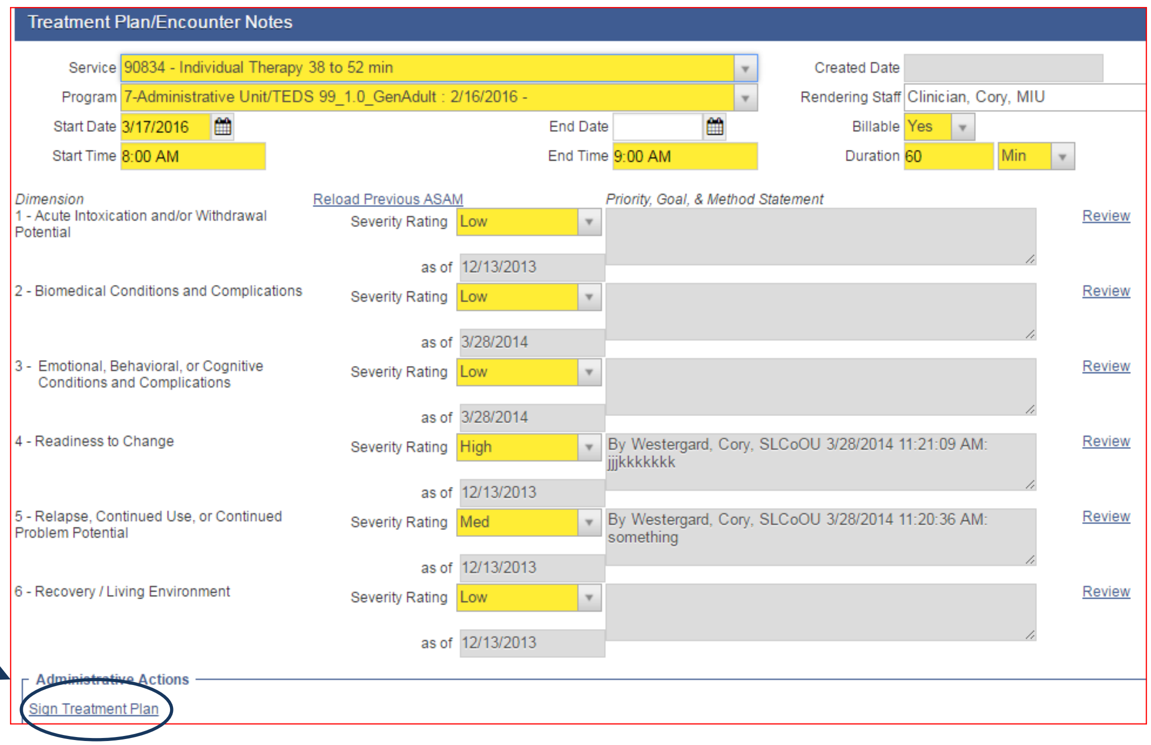
Note: **Entering Service and Start Date** will then load the Previous ASAM Severities and Statements from the last "Signed TXPlan".

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.



Notes

Encounters - SUD Notes

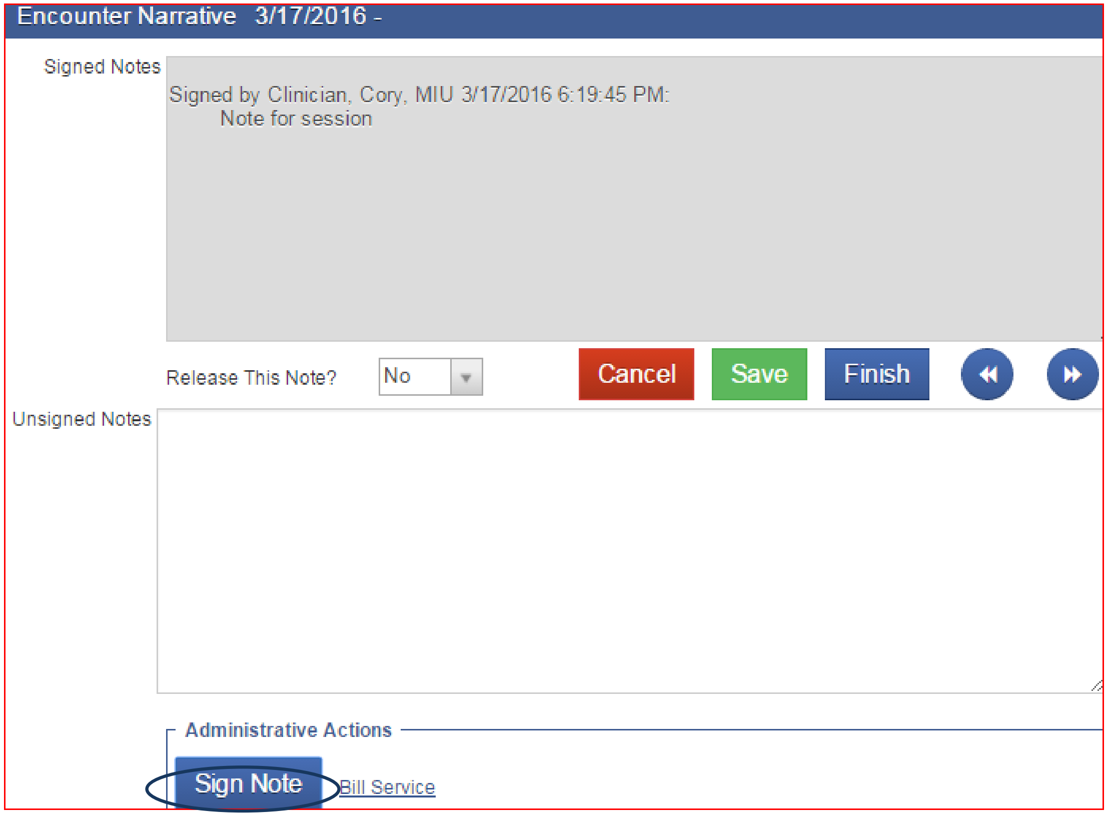
Background: This module allows you to document client encounters and associated notes.

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 your 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



Notes

Billable - SUD Notes

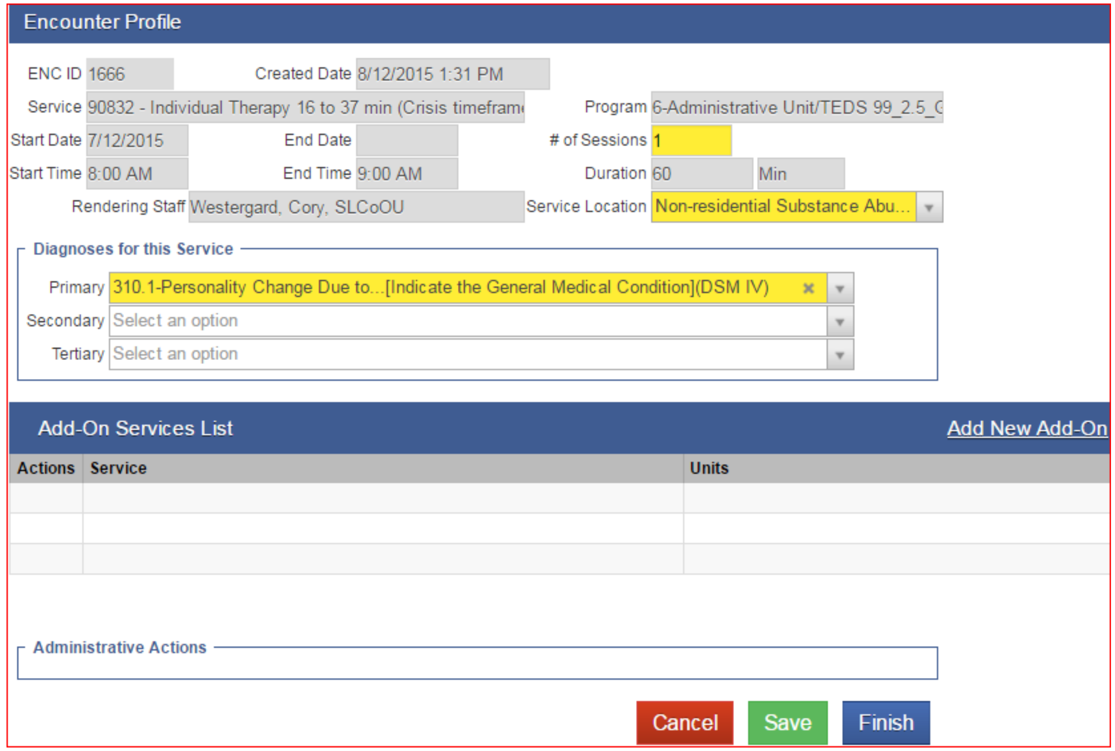
1. Bill Service: Only notes with a completed, saved, **Sign Note** can be **Released to Billing**.

2. Only those who have **Billing Rights** can release to Billing.

3. Notes can only be entered within the date range of the **Program** selected.

4. Diagnosis will populate based on the most recent Diagnosis entered as of the date of service.

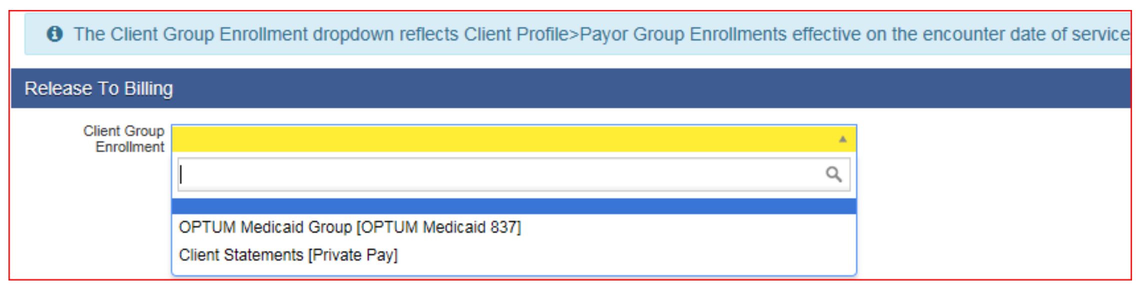
5. Add-On codes should be entered according to the service provided.



Release to billing

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

7. Release to Billing can only be used if all yellow fields are Completed and the **Encounter Note** narrative is complete.



Notes

Billable - MH Notes

1. Bill Service: Only notes with a completed, saved,
Sign Note can be **Released to Billing**.

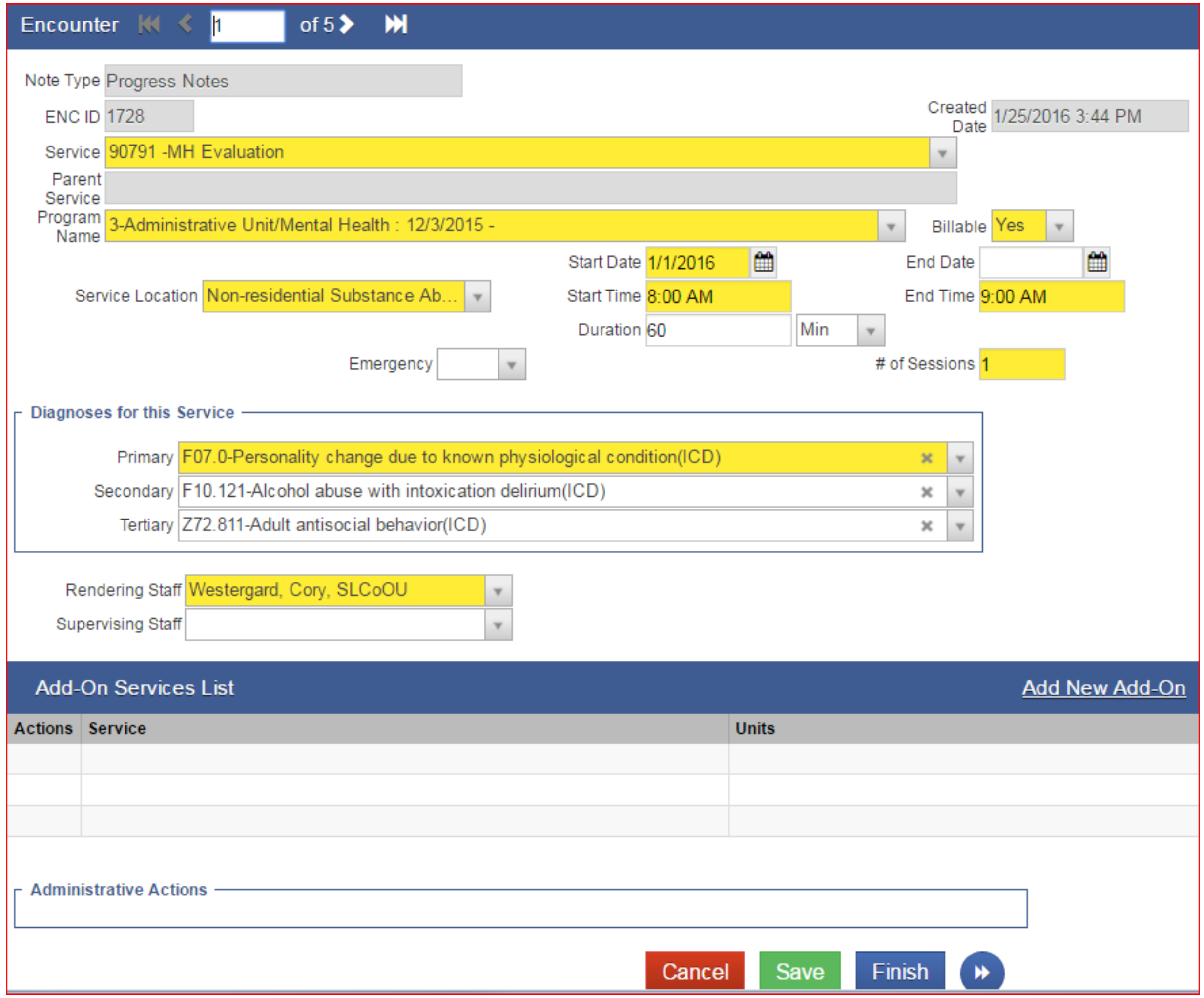
2. Only those who have **Billing Rights** can release to Billing.

3. Notes can only be entered within the date range of the **Program** selected.

4. Diagnosis will populate based on the most recent Diagnosis entered as of the date of service.

5. Add-On codes should be entered according to the service provided.

6. The **NEXT >>** screen will capture the note of the service



Notes

Encounters - MH Notes

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

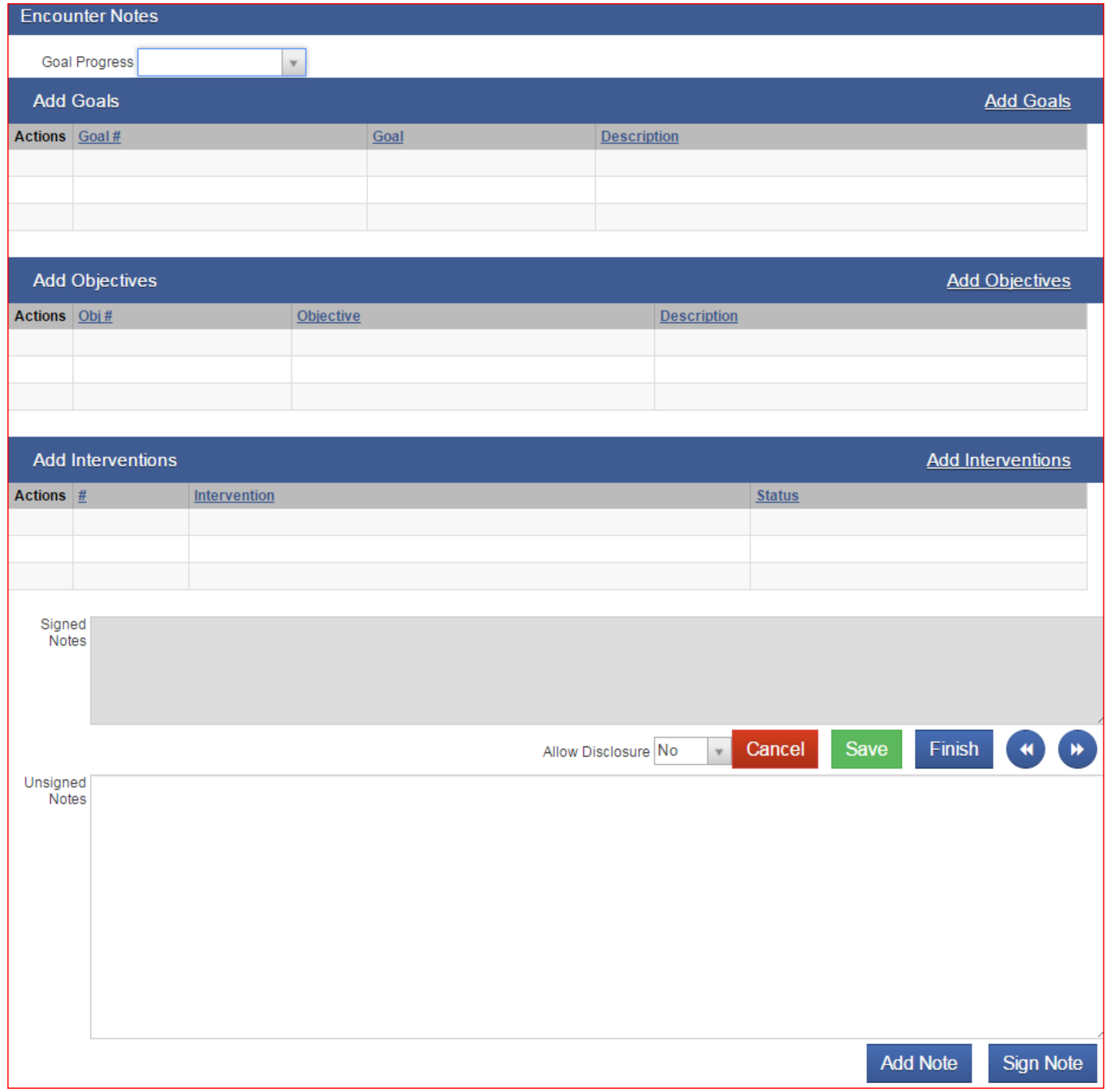
1. Use links <u>Add Goals</u>, <u>Add Objectives</u>, or <u>Add Interventions</u> to include Treatment plan information on the service note.

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 your click on **<u>Sign Note</u>** your note is stamped with your name, credentials and date. Then click on **<u>Save.</u>**

3. From here a link for **<u>Release to Billing</u>** will be visible at the bottom of the screen if applicable.

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



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).

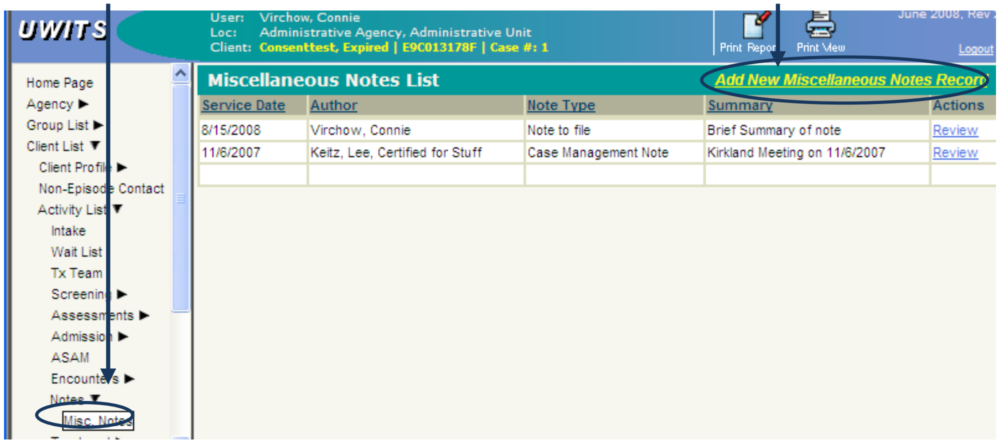
6. Click on **Save** or **Finish.**

***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**.

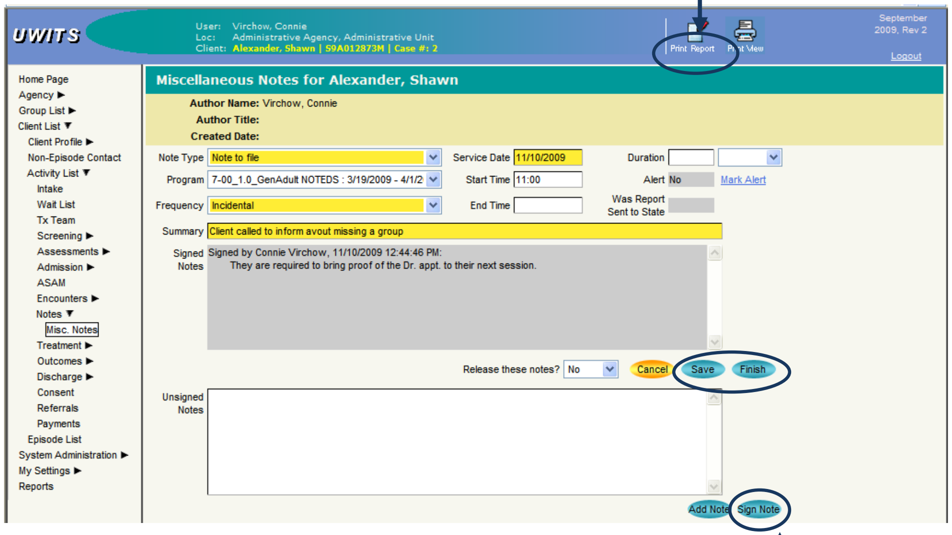
6. Miscellaneous Notes Report: After clicking **Save** and while you are still within the encounter record, single-click the **Print Report** icon to generate a report of the listed notes for this particular client.

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.

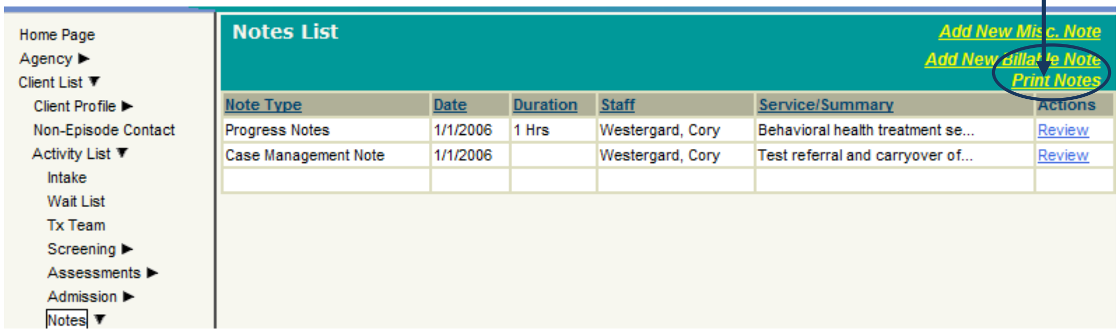
1. Print All Notes: From the Left Menu Bar, click **Notes** on to pull up the Notes List screen. This generates both the Encounters and the Miscellaneous Notes.

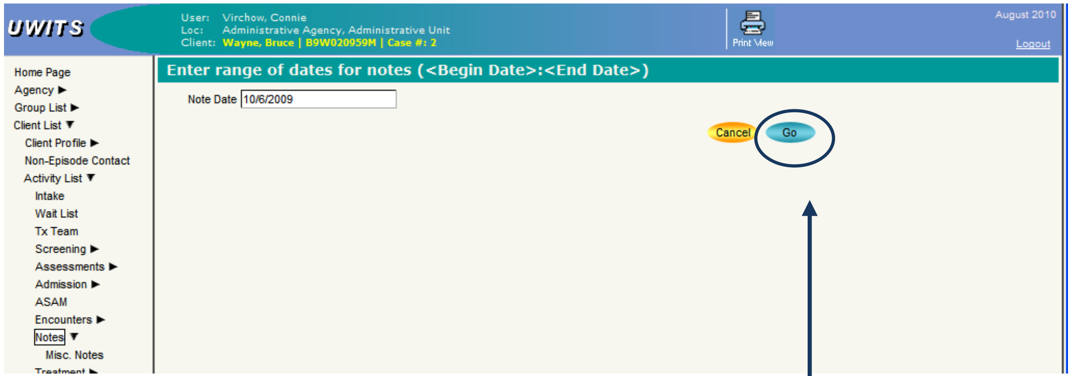
2. Click **Print Notes** at the top right.

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.





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