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# MIS SUBSTANCE USE DISORDER

## OUTPATIENT/OTP ENCOUNTERS AND GROUP MODULES



*Live Well San Diego*

**County of San Diego  
Behavioral Health Services**



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***This handout contains screen shots of confidential and proprietary information for view only. It shall not be copied or shared for anything other than its intended purpose as a training resource for the County of San Diego, Substance Use Disorder (SUD), Management Information System (MIS).***



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## **CONFIDENTIALITY**

**HIPAA regulations mandate that all client information be treated confidentially.**

Access to SanWITS is based on your position and your functional roles. You will have the access you need to complete your job duties. This can include access to clients in your agency and other facilities. Remember – with more access comes greater responsibility regarding confidentiality!

You are not to share passwords with other staff. The Summary of Policy you signed before receiving your access to SanWITS included your agreement to this directive. You are still responsible if someone with whom you have shared your password violates confidentiality!

The County SUD MIS unit investigates any suspicions regarding sharing of passwords. Consequences are up to and may include termination.

Do not open any active client charts unless instructed to do so, or if it is required to complete your job duties. “Surfing” clients is a blatant breach of confidentiality.

Remember you are personally and legally responsible for maintaining confidentiality. Take it seriously.

Do not leave your computer unlocked with client data on the screen for others to access or view while you are away from your desk. Lock your SanWITS session before leaving your computer.

When printing, make sure you are printing to a confidential printer, and pick up your printout promptly. Leaving printed Protected Health Information (PHI) out is also a confidentiality violation.

**Play it safe – keep in mind how you would want your own PHI handled!**





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## SANWITS SOFTWARE BASICS

- San Diego Web Infrastructure for Treatment Services (SanWITS) is accessed through: <https://sandiego.witsweb.org>  
Save this to your favorites or create a shortcut for your desktop.
- NAVIGATE by using a function link, hand icon, pen, arrow key, or button. The back arrow in the internet browser does not pull up the previous screen.
- FUNCTION LINKS are underlined links allowing certain actions to be completed. Function links are usually located on the section headers. A hand icon also functions as a link allowing a user to complete activities.
- SYSTEM REQUIRED FIELDS are in bright or light **yellow**. The bright yellow fields must be completed to save the screen and move forward. The system allows saving of the record with the light yellow fields left blank, but the activity will show the status as In Progress (unfinished).
- OPTIONAL FIELDS are in white. Some white fields may be yellow fields in other pages or screens.
- SYSTEM GENERATED FIELDS are in gray. Nothing can be changed or added in these fields.
- **GO** is the execute button. Click **GO** to change agency or facility, execute a command, load data, or pull up screens.
- **CANCEL** returns to the previous screen without saving the data entered.
- **SAVE** saves the information entered and, in certain screens, adds multiple records of data.
- **FINISH** returns the user to the first screen of the module or Activity List.
- **ARROW** keys or buttons move forward or back from screen to screen.
- Contact information for questions and end user support can be found on the last page of this training manual.

### **Reminder:**

Menu access is set up according to credentials (roles). The menus you have at your program may look different than the menus shown in the screen shots in this packet.



## VERIFYING CLIENT PROFILE

**Client Profile:** Search the client profile to verify the accuracy of information. From the navigation pane:

Click Client List.



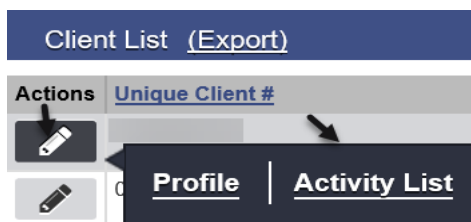
Complete the search parameters and click **GO** to search the client profile.

Client Search

Agency		Facility	<input type="text"/>
First Name	<input type="text" value="Fake*"/>	Last Name	<input type="text" value="Clie*"/>
SSN	<input type="text" value="999*"/>	DOB	<input type="text"/>
SanWITS Training Client Id	<input type="text"/>	Provider Client ID	<input type="text"/>
Unique Client Number	<input type="text" value="cf*"/>	Primary Care Staff	<input type="text"/>
Treatment Staff	<input type="text"/>	Intake Staff	<input type="text"/>
Case Status	All Clients	Number Type	<input type="text"/>
Other Number	<input type="text"/>		
Include Only Active Consents	Yes		

If a match is identified, the Client List will populate with the matching results. To open an existing client profile:

Hover over the pen under the Actions column. To review the completed activities, click **Activity List**.

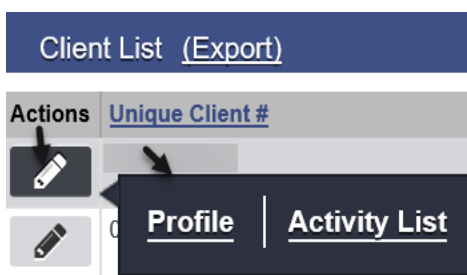




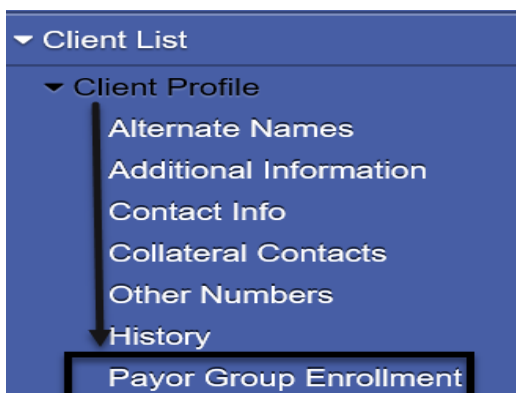
Verify the status of completed activities from the Activity List.

Client Activity List				
Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)			Completed ←
	Intake Transaction			Completed ←

**Payor Group Enrollment:** To verify the client's payor group enrollment, follow the steps above on how to search for a client profile. From the Client List, click **Profile**.



Click **Payor Group Enrollment**.



At the Payor List screen, verify the accuracy of the plan, group and start date.

Payor List								Add Benefit Plan Enrollment
Actions	Priority	Plan	Group	Subscriber/ Acct#	Subscriber/ Resp Party	Start Date	End Date	
	1	ODS DMC- Non Peri	Medi-Cal - Non Perinatal					



## PROGRAM ENROLLMENT

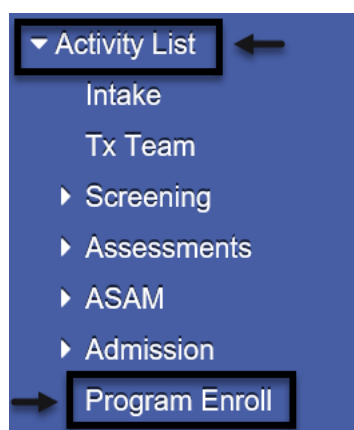


**Notes:** 1) Enter a program enrollment for a **Non-BHS Contracted Client** for monitoring purposes. 2) Open a program enrollment for **Recovery Services** if the facility provides recovery services. 3) Close the program enrollment and open a new episode when **changing level of care** to ensure accuracy of client records and for billing purposes.

The Department of Health Care Services (DHCS) has guidelines regarding allowable treatment services that can be billed to Drug Medi-Cal (DMC). A program enrollment is required to bill to DMC. Program enrollment records the client's enrollment in a specific treatment modality.

**Adding a Program Enrollment:** To add a program enrollment, from the navigation pane:

Click Activity List → Program Enroll



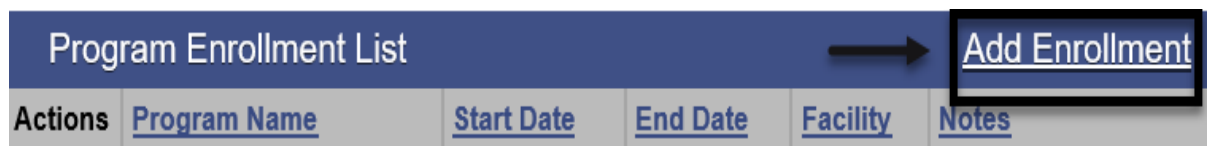
The Program Enrollment screen displays the program enrollments for one year from today's date. To search for enrollments, complete the parameters, and click **GO**.

Program Enrollment

Program Name	<input type="text"/>	Facility	<input type="text"/>
Modality	<input type="text"/>		
Active Program Enrollments During Date Range		From: <input type="text" value="3/19/2019"/>	To: <input type="text" value="3/19/2020"/>
			<input type="button" value="Clear"/> <input type="button" value="Go"/>



To add a new program enrollment, click **Add Enrollment**.



The Program Enrollment screen has several required fields that should be completed.

**Start Date:** Enter the date the client is admitted to the facility.

**Program Name:** Select the program name from the drop down menu.

**Program Staff:** The field prepopulated with the name of the staff who is logged in. Change the program staff name, if necessary.

**Perinatal:** The field defaults to No for male clients and is required to be completed for female clients. Select **Yes** or **No**, if client is female.

The Perinatal field pertains to the **facility's perinatal certification**.

If the facility is perinatal certified and the client is pregnant/post-partum, select **Yes**.

If the facility is perinatal certified but the client is not pregnant/post-partum, select **No**.

If the facility is not perinatal certified and the client is or is not pregnant, select **No**.

Click **Save** and **Finish**







## Non-BHS Contracted Clients

All Non-BHS contracted clients should have a program enrollment, but **NO** encounters should be created in SanWITS.

The steps to open a program enrollment for Non-BHS Contracted clients are the same. The only difference is the program name.

**Program Name:** Select **Non BHS Contracted Client**.

Program Enrollment Profile

Facility

Program Name **Non BHS Contracted Client**

### NOTES

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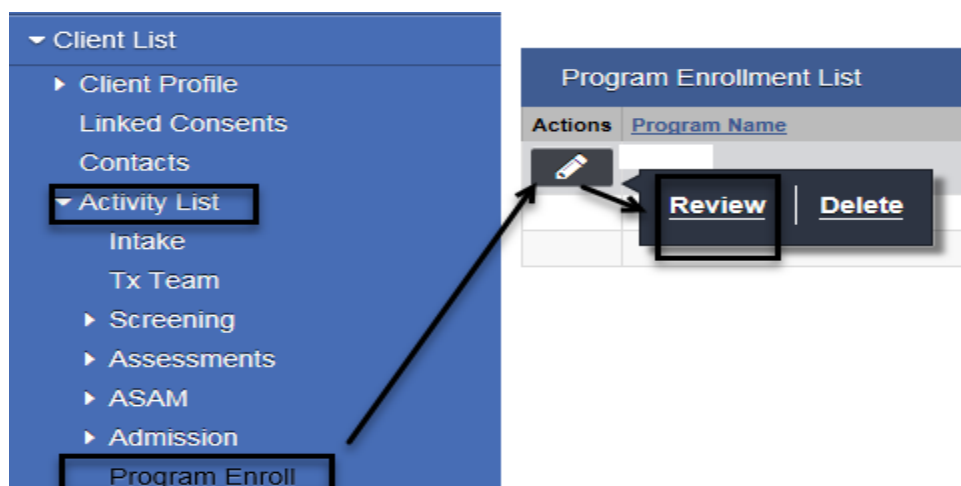


## ENDING PROGRAM ENROLLMENT

After the client completes the treatment, the client should be discharged and the program enrollment ended.

To close a program enrollment from the navigation pane:

Click Activity List, then click **Program Enroll**. Hover over the pen in Actions, and click **Review**.



Enter the date of discharge on the **End Date** field.

Select a **Termination Reason**, and enter comments on the **Notes** field.

Program Enrollment Profile

Facility	<input type="text"/>	Start Date	<input type="text"/>
Program Name	<input type="text"/>	End Date	<input type="text"/>
Program Staff	<input type="text" value="Staff, Rendering"/>	PS Court Phase	<input type="text"/>
Perinatal	<input type="text" value="No"/>		
Termination Reason	<input type="text"/>		
Notes	<input type="text"/>		

Click **Save** and **Finish**.





## Changing Level of Care (LOC)

Whenever the level of care (LOC) changes from OS to IOS or vice versa, from OTP courtesy dosing to regular OTP, close the program enrollment and the treatment episode first.

After closing the case, open a new episode for the new LOC. Open a program enrollment for the **new LOC** under the **new episode**. To open a new treatment episode, refer to the Intake and Episode Section of the Intro to Admin Functions Training Manual.

## Recovery Services

If a client who has completed treatment is discharged and then receives recovery services, open a program enrollment for **recovery services** within the **same episode**.

The steps to open a program enrollment for Recovery Services are the same. The only differences are:

**Start Date:** Enter the date the client started receiving recovery services.

**Program Name:** Select **Recovery Services**.

Click **Save** and **Finish**.

The screenshot shows the 'Program Enrollment Profile' form. The 'Program Name' dropdown is set to 'Recovery Services'. The 'Start Date' field is highlighted with a black box and an arrow. The 'End Date' field is empty. The 'Program Staff' dropdown is highlighted in yellow. The 'PS Court Phase' dropdown is empty. The 'Perinatal' field is set to 'No'. The 'Termination Reason' dropdown is empty. The 'Notes' field is empty. Below the form is the 'Administrative Actions' section, which contains three buttons: 'Cancel', 'Save', and 'Finish'. The 'Save' and 'Finish' buttons are highlighted with black boxes and arrows.



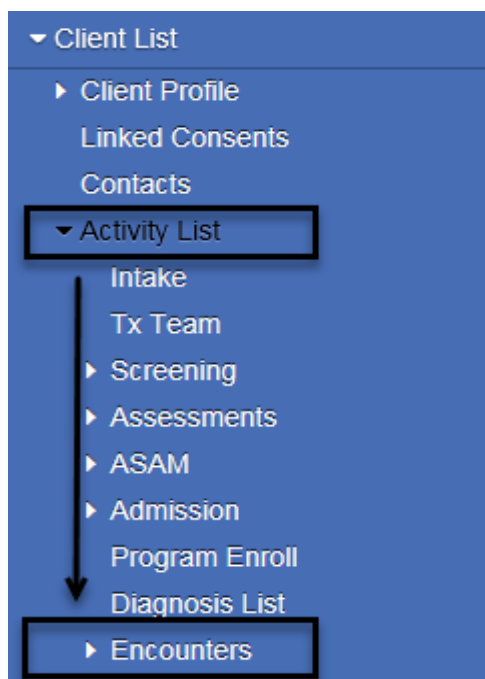
## ENCOUNTERS



**Notes:** 1) Although you have 7 days to enter encounters, the recommendation is to enter encounters daily. 2) Do **not** enter encounters for Non-BHS Contracted Clients.

Encounters are the individual client services that have been delivered and documented within a treatment episode. To search or enter an encounter, from the navigation pane:

Click Activity List → Encounters



The Encounter Search and Encounter List sections are for searching and viewing of previously entered encounters. The default look back date for encounters is one year from today's date.

Encounter Search

Start Date: 12/11/2018 → End Date: 12/11/2019

Rendering Staff:

Encounter Status:

Allow Disclosure of Note:

Service:

Program:

Group Session ID:

Clear Go

Encounter List (Export) [Add Encounter](#)

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Group Session ID	Status
			:		,LMFT	→	Not Released



## Searching for a Previously Entered Encounter

Even though the default look back date for encounters is one year, a staff can view older service dates. To search for an encounter, adjust the start date and click **GO**.

Encounter Search

Start Date

End Date

Rendering Staff

Service

Encounter Status

Program

Allow Disclosure of Note

Group Session ID

Clear

To view a previously entered encounter, hover over the pen in the Actions column and click **Review**.

Encounter List (Export)

Actions	Svc Date	Service
 <b>Review</b>   <b>Clone</b>		Individual Counseling OTP

The encounter ID and created date and time were generated by the system when the encounter was saved.

Note Type: DMC Billable

ENC ID:

Created Date:

Program Name: Main Facility/OS : 8/1/2018 -

Service: Individual Counseling OS

Billable: Yes

Service Location: Non-residential Substance Abuse TX Facility

Start Date:

End Date:

Start Time:

End Time:

Travel Duration: 0 Min

Documentation Duration: 10 Min

Session Duration: 90 Min

Total Duration: 100 Min

Contact Type: Face To Face

Emergency:

# of Service Units/Sessions: 1

Visit Type: IN-Individual Counseling

Medi-Cal Billable: Yes

Pregnant/Postpartum: No

Was an interpreter used?: No Interpreter Needed

In what language was the service provided?: English

Which Evidence-Based Practices were used?

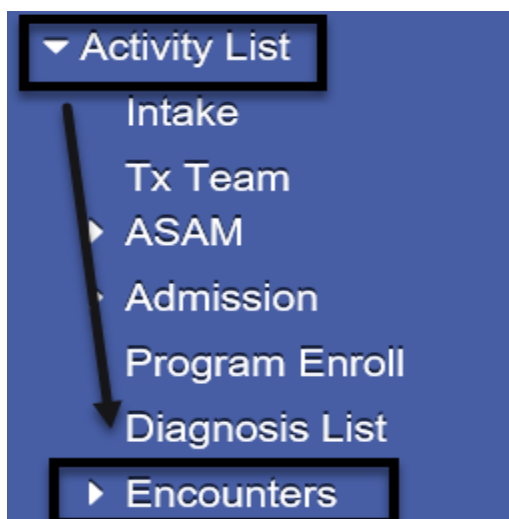
Evidence-Based Practices: None, Other

Used Evidence-Based Practices: Motivational Interviewing, Relapse Prevention



## Adding an Encounter

To add an encounter from the Activity List menu, click **Encounters**.

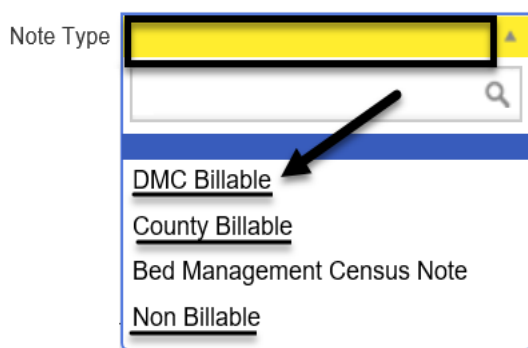


At the Encounters window, click **Add Encounter**.



The encounter section consists of one screen only but has several required fields. Complete the encounter screen starting from the top.

**Note Type:** Select **DMC Billable** if billable to Medi-Cal. Select **County Billable** if billable to the County. **Non Billable** should be used only for disallowed services.





**Service:** Select Case Management

**Billable:** Select **Yes** if billable to DMC or the County in order to release to billing. Select No for Non Billable services.

Service

Billable

No

**Start Date:** Enter the date of service in this field.

Start Date   End Date  

**Service Location:** Select from the three options based on the type of facility or location of service. If Telehealth is selected as the service location, Telehealth should also be selected as the contact type.

Service Location

- Non-residential Substance Abuse TX Facility
- Residential Substance Abuse TX Facility
- Telehealth

**Travel Duration:** Enter the clinician’s travel time in minutes. If there is no travel time, enter zero (0). *For OTP, enter 0. OTP cannot bill for travel.*

**Documentation Duration:** Enter time in minutes. *For OTP, enter 0. OTP cannot bill for documentation.*

**Session Duration:** This field displays for services that are duration based, such as individual counseling and case management services. Enter the total session time with the client. *For OTP, bill in 10-minute increments for individual counseling, and for case management, if facility is approved to provide services, enter 15-minute increments.*

**Total Duration:** The field shows the sum of travel, documentation and session durations as read only.

Travel Duration  Min

Documentation Duration  Min

Session Duration  Min

Total Duration  Min



**Contact Type:** Select the correct contact type for the integrity of the service session and to prevent rejection of billing.



**Important Note:**

**No Show** is a scheduled appointment that the client missed.

**No Contact** is when a counselor provided a service on behalf of the client but the client was not present at the time, e.g. case management.

**Telehealth** is when a non-public facing remote communication application was used to provide service to the client.

Contact Type

- No Show
- Face To Face
- Phone
- Telehealth
- In the Community
- No Contact

**Medi-Cal Billable:** The Medi-Cal Billable field indicates whether the service is billable to Medi-Cal or not. This field is logically linked to the client's Payor Group Enrollment. If DMC billable, select **Yes**. If County billable, the field defaults to **No**, which is accurate. If Non Billable, select **No**.

Medi-Cal Billable:

**Pregnant/Postpartum:** Defaults to No and is read only if client is male. The field is active but optional if the client is female.

Pregnant/Postpartum

**Was an interpreter used:** If the language used was other than English and an interpreter was used, indicate if it was an internal or external interpreter.

**In what language was the service provided?:** The language is prepopulated from the client profile screen and should be modified if the language used in the session is different.

Was an interpreter used?

In what language was the service provided?





**Which Evidence-Based Practices were used?:** Select the evidence based practices (EBP) that were used during the encounter.

To select, single click on the EBP used, then click the blue right arrow. Double clicking on the selected EBP will also populate the EBP on the right column.

Which Evidence-Based Practices were used?

Evidence-Based Practices		Used Evidence-Based Practices
None	→	
Motivational Interviewing		
Relapse Prevention		
Other		

**Diagnoses for this Service:** The diagnosis field is a read-only field and is required to release to billing. The diagnosis needs to be entered via the Admission record to ensure that it will prepopulate on the encounter.

Diagnoses for this Service	
Primary	F10.929-Alcohol use, unspecified with intoxication, unspecified(ICD)
Secondary	
Tertiary	

**Rendering Staff:** The Rendering Staff field is prepopulated with the user's name and should show the name of the counselor who rendered the service. The rendering staff must have a valid National Provider Identifier (NPI).

Rendering Staff

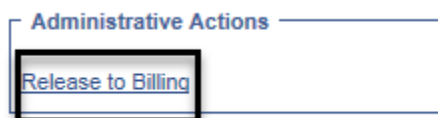
Click **Save**.



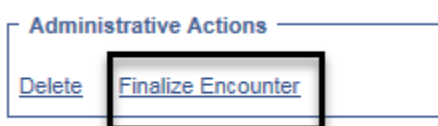


For the next step, select one of the appropriate administrative actions shown below.

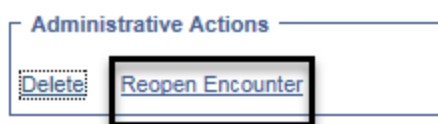
## Administrative Actions



Release to Billing generates a claim. Once a claim has been generated, the encounter fields are grayed out and cannot be edited.



Finalize Encounter closes a Non Billable encounter and renders the encounter as read only.



Reopen Encounter reopens a finalized encounter.

Click **Finish**.



## NOTES

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## OTP DOSING ENCOUNTERS



**Note:** Encounters for OTP dosing must have a Start Date **and** an End Date.

The majority of OTP encounter fields are the same fields as those on regular individual encounters and should be completed accurately.

**Below fields are specific to OTP dosing encounters.**

OTP dosing can be billed in consecutive days for **Methadone only**. An end date is required to bill for consecutive days and should be end dated by the close of the month.

Start Date	<input type="text"/>	End Date	<input type="text"/>
Start Time	<input type="text"/>	End Time	<input type="text"/>

**Duration:** The duration field displays only on OTP dosing services and is not a required field. **Do not** enter duration.

Duration

The # of Service Units/Sessions field should reflect the number of consecutive days billed for **Methadone only**.

# of Service Units/Sessions  ← **Total # OTP Dosing Days**

MAT Brand OTP and MAT Generic OTP services must be billed on a **daily** basis. The National Drug Code (NDC) and Drug Quantity fields are required for MAT brand and MAT generic services.

National Drug Code	<input type="text"/>	Drug Quantity	<input type="text"/>	<input type="text"/>
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Complete the rest of the encounter section. Click **Save** and **Finish**.



## GROUP LIST



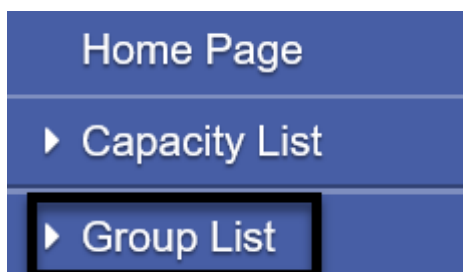
**Notes:** 1) The Group List **must** be used to create **bulk** encounters for individuals who attended a group session. 2) Do **not** mix Recovery Services with other groups. 3) If a Non-BHS Contracted Client attended a group session, mark the client as present but do **not** create an encounter. 4) **Group size** is a minimum of **2** and a maximum of **12** clients.

The Group List feature was enhanced specifically for Organized Delivery System (ODS) Group Counseling. The Group List module also allows clinicians to easily track clients who are seen in a group setting.

### Adding a Group Profile

To ensure that services which were delivered in a group session are calculated with the appropriate claim charge amount, a group profile must be used to create bulk encounters for individual participants of the group. The group profile identifies the specific group within the facility and is used to prepopulate the group name, group type, start time and the roster of clients. To create a group profile, from the navigation pane:

Click **Group List**.



At the Group Profile screen, click **Add**.





The group profile identifies the specific group within the facility. A group can be a mix of Outpatient Services (OS) and Intensive Outpatient Services (IOS). **Recovery Services cannot be combined with OS and IOS groups. Recovery services clients can only be in a group with other recovery services clients.**

Complete the required fields, and click **Save**.

**Group Profile**

Group Name  Start Date  End Date

Group Type  Day of Week  Time of Day

Lead Staff  Room Location

Facility

Co-Lead Staff  Selected Co-Lead Staff

Description

**Administrative Actions**

[Create Group Session](#)

**Roster** [Show All Clients](#) [Edit Roster](#)

## Creating a Roster

Each group profile needs a roster. The roster is a list of agency clients with program enrollments who participate in a group session. To create a roster, click **Edit Roster**.

**Administrative Actions**

[Create Group Session](#) [Print Sign-In Sheet](#)

**Roster** [Show All Clients](#)

<a href="#">Client Name</a>	<a href="#">Program</a>	<a href="#">Client Due</a>	<a href="#"># of Approved Sessions</a>	<a href="#"># of Sessions Attended</a>	<a href="#">Status</a>	<a href="#">Status Effective Date</a>
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To add members to the group profile roster, click **Add Member**.

Client Name  Program   
# of Sessions Approved  Status   
# of Sessions Attended  Status Effective Date   
Client Due  Reason

**Add Member**

**Finish**

Each member on the roster is under a status category, for example active or inactive. The roster also captures when the client was added or removed. The status must be **Active**, and the status effective date must be on or after the client's program enrollment.

Complete the required fields, and click **Save**.

Client Name  Program   
# of Sessions Approved  Status   
# of Sessions Attended  Status Effective Date   
Client Due  Reason

**Add Member**

**Cancel** **Save** **Finish**

**Repeat** the same steps for each additional member until all members have been added to the group profile's roster.

After all members have been added to the group, click **Finish**.

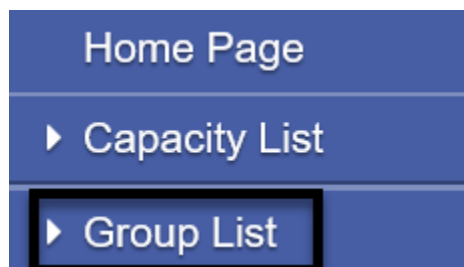




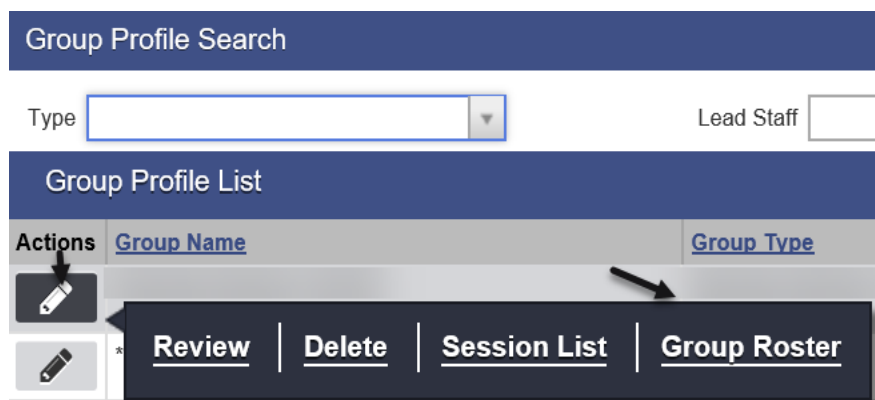
## Updating Client Status

To update a client's status in a group profile, from the navigation pane:

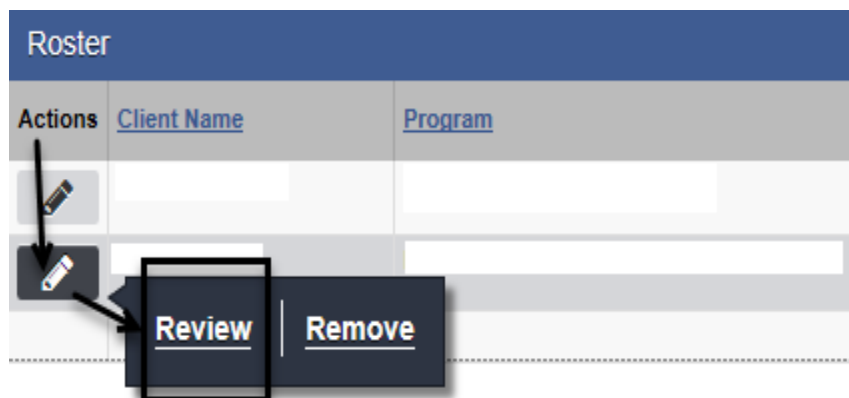
Click **Group List**.



At the Group Profile List window, hover over the pen in Actions and click **Group Roster**.



At the Roster screen, hover over the pen in Actions next to the client's name and click **Review**.





Select the appropriate status and enter the status effective date and the reason.

Click **Save** and **Finish**.

The client's status can also be updated within the group profile screen by clicking on the **Edit Roster**.

At the Roster screen, hover over the pen in Actions next to the client's name and click **Review**.





Select the appropriate status and enter the status effective date and the reason.

Click **Save** and **Finish**.

Add Member

Client Name	<input type="text"/>	Program	<input type="text"/>
# of Sessions Approved	<input type="text"/>	Status	<input type="text" value="Active"/>
# of Sessions Attended	<input type="text" value="4"/>	Status Effective Date	<input type="text"/>
Client Due	<input type="text"/>	Reason	<input type="text"/>

## Searching a Group Profile

To search and use an existing group profile, from the navigation pane:

Click **Group List**.

Home Page

▶ Capacity List

▶ **Group List**

In the Group Profile Search section, search by type or lead staff and click **GO**.

Group Profile Search

Type	<input type="text"/>	Lead Staff	<input type="text"/>	Active	<input type="text" value="Yes"/>
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The Group Profile List displays the existing group profile. Hover over the pen in Actions and click **Review**.

**Group Profile Search**

Type  Lead Staff

**Group Profile List**

Actions	Group Name	Group Type
		
<div style="background-color: #333; color: white; padding: 5px; display: flex; justify-content: space-around;"> <span><u>Review</u></span>              <span><u>Delete</u></span>              <span><u>Session List</u></span>              <span><u>Group Roster</u></span> </div>		

The group profile launches to be updated or to create billing via the **Create Group Session**.

**Group Profile**

Group Name  X Start Date  End Date

Group Type  Day of Week  Time of Day 8:00 AM

Lead Staff  Room Location

Facility

Co-Lead Staff  Selected Co-Lead Staff

Description

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**Administrative Actions**

[Create Group Session](#) ←

## NOTES

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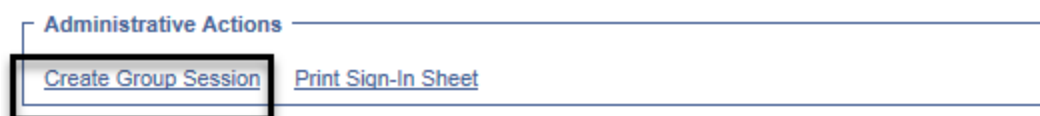


## GROUP BULK ENCOUNTERS

### A) Creating Group Session Notes (Encounters)

Group session billing should always be done via the group module in order to create group session encounters in bulk. The first step in creating bulk encounters is to create group sessions notes.

To create group session notes, open the group profile for the group. In the Administrative Actions at the bottom of the group profile, select **Create Group Session**.



The Group Session Notes have several required fields that prepopulate to the bulk encounters. Complete the fields and click Save.

**Note Type:** Select **DMC Billable** if one (1) of the clients is Medi-Cal eligible.

**Start Date:** Enter the date of the group session.

**Billable:** Select **Yes**.

**Start Time** and **End Time:** Enter the group's scheduled start time and end time. When a client is late or left the group session early, the actual time will be reflected on the client's individual encounter.

**Calculate ODS units:** Select **Yes**. When the individual encounters are created, the claim charge is calculated according to the ODS requirements. **OTP always select No.**

**Travel Duration:** Enter the clinician's travel time, if applicable. Enter 0 if there is no travel time. **OTP enter 0. OTP cannot bill for travel time.**

**Session Duration:** Enter the group session duration in minutes. **For OTP, bill 10-minute increments for group services.**

**Lead Staff:** The lead staff is the counselor who led the group.

**Location:** Select the appropriate facility.



**Service:** For OS, Select Group Counseling OS.  
 For IOS, select either \*ODS clinical group-valid beginning 7/1/19 or  
 \*ODS Patient Education Group valid beginning 7/1/19.  
 For **mixed OS/IOS**, select \*ODS clinical group-valid beginning 7/1/19.  
**For OTP, select Group Counseling OTP**  
 For Recovery Services, select \*\*Recovery Service Group.

**Note:** The Note field is not required to save the group session notes, but it is **required** to create bulk encounters. **Enter** the type of the group, see example below.

Click **Save**.

Group Session Notes

Group Name:  Session ID:

Group Type: ODS Group

Note Type:  Start Date:  End Date:

Billable:  Start Time:  End Time:

Calculate ODS units:

Lead Staff:  Duration:  Min

# of Service Units/Sessions:

Location:

Service:

Co-Lead Staff:

Note:

Administrative Actions:

Proceed to the bottom of the Group Session Notes for the next steps in creating bulk encounters.



**Note:** For IOS, Patient Education service is defined as “providing research-based education on addiction, treatment, recovery and associated health risks.”



## B) Creating Bulk Encounters

After saving the group session notes, the next step is to create bulk encounters within the Group Session Notes section. Bulk encounters are created for all BHS contracted clients who attended a group session. To create encounters for BHS contracted clients, mark them first as present by performing the following steps:

1. Place a **check mark** next to the client's name
2. Select **Mark as Present** from the drop down menu
3. Click **Perform Action**

Note: ODS Group

Administrative Actions

Cancel Save Finish

Attendees

1

2

3

Perform Action Add Attendee

Actions	Individual Note	Misc. Notes	Encounter	Client Name	Status
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

Mark as Present  
Mark as No Show  
Mark as Excused  
Create Encounter  
Clear Errors

The Status field shows Present for the clients who were marked as present.

# Attnd	Status
1	Present
1	Present

To continue creating the bulk encounters, perform the following three (3) steps.

1. Place a **check mark** again on all the clients who were previously marked present
2. Select **Create Encounter** from the drop down menu
3. Click **Perform Action**

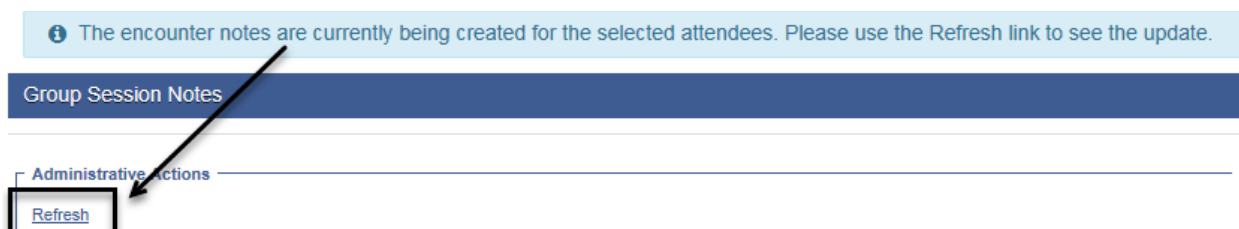
Attendees

Create Encounter Perform Action

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd	Status
		Create	Create	<input checked="" type="checkbox"/>	1	Present



Above the Group Session Notes, a message that encounter notes are being created displays. Below the Administrative Actions, click **Refresh**. Keep clicking Refresh until the Refresh link clears and no longer displays.



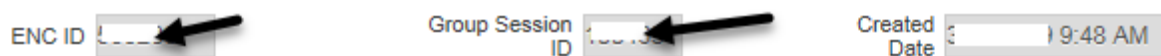
### C) Updating Individualized Encounters

When the bulk encounters are created, the Encounter column populates with the View link. Each encounter must be viewed and updated in order to complete all the individual encounters. Click **View** to open the encounter.

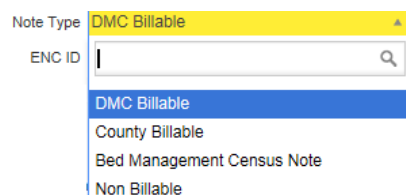
Attendees					
Actions	Individual Note	Misc. Notes	Encounter	<input type="checkbox"/>	Client Name
		<a href="#">Create</a>	<a href="#">View</a>	<input type="checkbox"/>	
		<a href="#">Create</a>	<a href="#">View</a>	<input type="checkbox"/>	

Review and modify each individual encounter for accuracy.

The system generates a group session ID for the whole group and an Enc ID for each individualized encounter. The Group Session ID field is used during the billing process.



**Note Type:** This field is prepopulated from the group session notes and should be individualized. If client has Medi-Cal eligibility, select DMC billable. If it's County, select County Billable. Select Non Billable for disallowed services only.





**Billable:** Select **Yes**, except for Non Billable services.

Billable

**Medi-Cal Billable:** For Outpatient services, if DMC, select **Yes**. If County billable, select **No**. *OTP only has DMC.*

Medi-Cal Billable:

**Travel Duration:** This field is prepopulated from the Group Session Notes as read only.

**Documentation Duration:** This field is prepopulated with **0** and should be modified for each individual client. *OTP is not able to claim documentation duration.*

**Session Duration:** This field is prepopulated from the Group Session Notes and should be modified if the client came in late or left early.

**Total Duration:** The field shows the sum of travel, documentation and session durations as read only. *OTP is not able to claim travel duration.*

Group Session Travel Duration	15	Min	▼	i	Documentation Duration	0	Min	▼	i
Session Duration	90	Min	▼	i	Total Duration	105	Min	▼	i

**Which Evidence-Based Practices were used?:** The EBP defaults to None and should be modified to the correct EBP. Deselect None first before selecting the EBP used.

Which Evidence-Based Practices were used?

Evidence-Based Practices	Used Evidence-Based Practices
Motivational Interviewing	None
Relapse Prevention	
Other	

After completing and reviewing the individual encounter, click **Save** and **Finish**.

**Repeat** the same process for all encounters included in the group bulk encounters to ensure all encounters are reviewed for accuracy before releasing to billing.



## CREATING ENCOUNTERS FOR NO SHOWS

It is required to create encounters for group members who were scheduled to attend the group session but were **No Show** or **Excused**.

For the group members who were scheduled to the group session and were **No Show** or **Excused**, select the names of the attendees, then on the drop down menu to the right select **“Mark as No Show”** or **“Mark as Excused”**, and click **Perform Action**.

Attendees					Mark as No Show	Perform Action	
Actions	Individual Note	Misc. Notes	Encounter	<input type="checkbox"/>	Client Name	# Attn	Status
		<a href="#">Create</a>	<a href="#">Create</a>	<input type="checkbox"/>		2	Present
		<a href="#">Create</a>	<a href="#">Create</a>	<input checked="" type="checkbox"/>		1	No Show
		<a href="#">Create</a>	<a href="#">Create</a>	<input checked="" type="checkbox"/>		1	No Show

Under the Encounter column, click **Create** for each client.

Attendees					
Actions	Individual Note	Misc. Notes	Encounter	<input type="checkbox"/>	Client Name
		<a href="#">Create</a>	<a href="#">Create</a>	<input type="checkbox"/>	

The encounter screen launches.

Encounter	
Note Type	Non Billable
ENC ID	
Program Name	
Service	Group Counseling OS
Group Session ID	
Billable	No
Service Location	Non-residential Substance Abuse TX Facility
Start Date	
End Date	
Start Time	
End Time	
Group Session Travel Duration	
Documentation Duration	
Session Duration	
Total Duration	
Contact Type	No Show
Emergency	
Visit Type	GP-Group
# of Service Units/Sessions	
Medi-Cal Billable	





Complete the required fields. A few differences for No Show or Excused members are:

**Note Type:** Select Non Billable.

Note Type

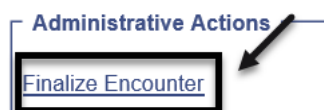
**Visit Type:** Select GP-Group for clinical group.

Visit Type

The Billable field prepopulated with No, and the Contact Type field prepopulated with No Show. These fields are system generated and are read only.

Review the rendering staff and change if necessary.

After completing the encounter, **Finalize Encounter**.



## NOTES

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## ADDING A NEW CLIENT TO AN EXISTING GROUP LIST



**Note:** Make sure the other encounters for the other group attendees have not been released before creating an encounter for the new client.

A new client who attended a recurring group session may be added to an existing group profile. To add a new client to an existing group profile, from the navigation pane:

Click Group List, and search the group profile from the Group Profile List. Hover over the pen in Actions, and click **Group Roster**.

Home Page  
▸ Agency  
▾ Group List  
Session List  
Group Type  
Residential Unit Dashboard  
▸ Residential Unit Mgmt  
▸ Client List

Group Profile Search  
Type  Lead Staff

Group Profile List

Actions	Group Name	Group Type
	Motivational Group A	ODS Group
<b>Review</b>   <b>Delete</b>   <b>Session List</b>   <b>Group Roster</b>		

In the Roster screen, click **Add Member**.

Roster

Actions	Client Name	Program	# of Approved Session	# of Sessions Attended	Status	Status Effective Date
				1	Active	
				1	Active	
				1	Active	

**Add Member**



Select the client's name and program. The status should be Active, and the status effective date would be the date the new client joined the group.

Click **Save**.

Client Name  Program

# of Sessions Approved  Status

# of Sessions Attended  Status Effective Date

Client Due  Reason

Click **Finish**.



**Do not** manually create an individual encounter for the new client who attended the existing group.

The encounter for the new member who joined the group session should be added via the group module. To create an encounter for the new client, from the navigation pane:

Click Group List → Actions → Session List

Home Page

▶ Agency

▼ Group List

Session List

Group Type

Residential Unit Dashboard

▶ Residential Unit Mgmt

▶ Client List

Group Profile Search

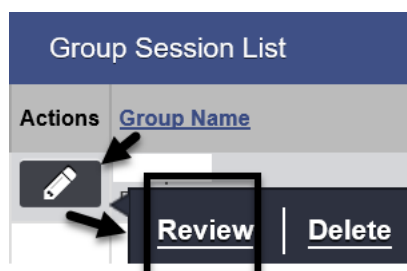
Type  Lead Staff

Group Profile List

Actions	Group Name	Group Type
<input type="button" value="Review"/> <input type="button" value="Delete"/> <input type="button" value="Session List"/> <input type="button" value="Group Roster"/>	Motivational Group	ODS Group



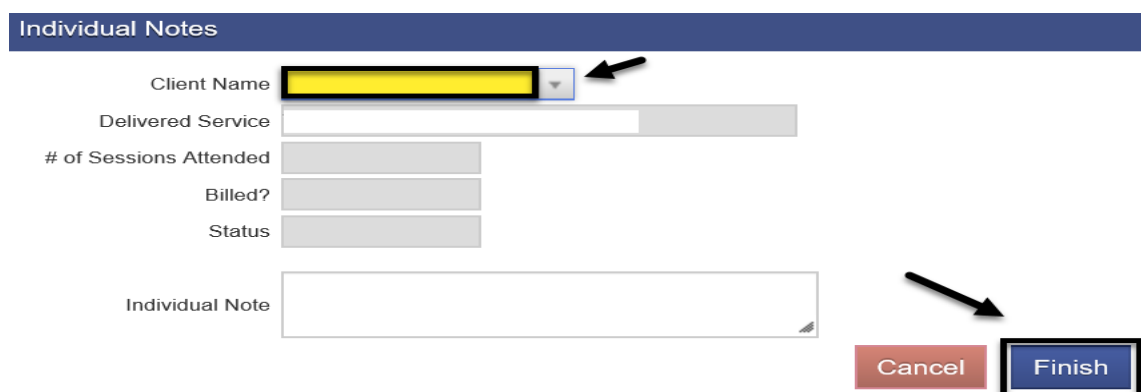
At the Group Session List, hover over the pen in Actions, and click **Review**.



The system opens the existing bulk encounters created for the group session. Click **Add Attendee** to add the new client to the group session.



In the Individual Notes screen, select the client's name. Click **Finish**.



The Attendees screen displays the client's name in the Client Name column and the Create link in the Encounter column. Place a **check mark** on the box next to the client's name. Select **Mark as Present** and **Perform Action**.





Place a **check mark** again on the box next to the client's name. Select **Create Encounter** and **Perform Action**.

Attendees						Perform Action	Add Attendee
Actions	Individual Note	Misc. Notes	Encounter	<input type="checkbox"/>	Client Name	# Attnd	Status
		Create	View	<input type="checkbox"/>	01	1	Present
		Create	View	<input type="checkbox"/>	01	1	Present
		Create	View	<input type="checkbox"/>	01	1	Present
		Create	<b>Create</b>	<input checked="" type="checkbox"/>	01	1	Present

Click **Refresh** until the link no longer displays and the View link displays in the Encounter.

**Administrative Actions**

[Refresh](#)

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**Attendees**

Misc. Notes	Encounter	<input type="checkbox"/>	Client Name
	<a href="#">View</a>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	

The View link indicates an encounter has been created for the added attendee. Click View to review the encounter.

Attendees					
Actions	Individual Note	Misc. Notes	Encounter	<input type="checkbox"/>	Client Name
		Create	View	<input type="checkbox"/>	
		Create	View	<input type="checkbox"/>	
		Create	View	<input type="checkbox"/>	
		Create	View	<input type="checkbox"/>	

Review and update the note type, documentation, start/end times, EBP and rendering staff. Remember to save the updated information before releasing to billing.



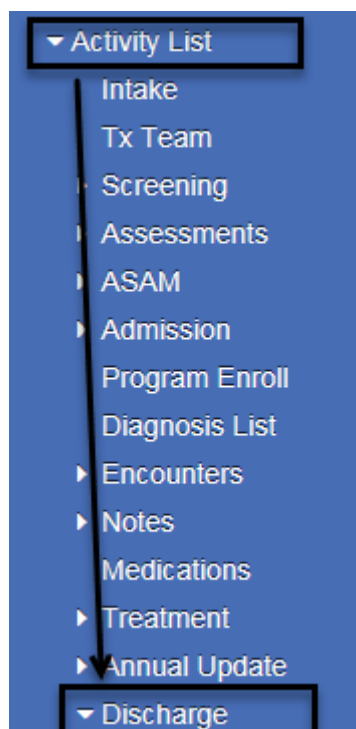
## DISCHARGE



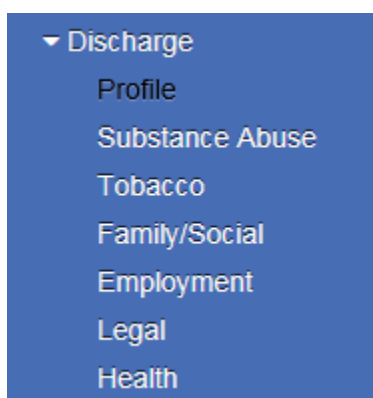
**Note:** A program enrollment must be ended prior to completing a client discharge.

After the program enrollment is closed and all client activities have been completed, discharge the client in SanWITS. To complete a discharge:

Click Activity List → Discharge




The majority of the screens are the same as the admission and annual update screens.





Complete the Discharge Profile screen and click the **right arrow** button.

**Discharge Profile**

Discharge Date   Admission Date


Discharge Status

Ancillary Services Referral

Ancillary Services	Selected Ancillary Services
0-None/No Other	
1-Education/Literacy	
2-Mental Health	
3-Medical	

**Record Status**

Record Created By	<input type="text"/>	Created Date	<input type="text"/>
Last Updated By	<input type="text"/>	Last Updated Date	<input type="text"/>
CalOMS Form Serial #	<input type="text"/>	Last Upload to State Date	<input type="text"/>

[Mark as Deleted](#)    

Complete the other screens and click **Save**. After fully completing the Discharge record, click **Finish**.

The system displays the message: “Client is discharged. Do you want to close this case also?”

The episode should be closed once the billing has been completed. Select **Yes** or **No**.

**Client is discharged. Do you want to close this case also?**



**Notes:** **1)** Complete a Discharge record when the level of care is changed from OS to IOS or vice versa or from IOS to Residential 3.1. After a Discharge record is completed, open a new episode for the new level of care. **2)** After a Discharge record is completed and the client returns to the program, open a new episode for the re-admission, even if the level of care is the same as the prior admission.



## ENCOUNTER DATA REPORT

The report listed below may be utilized for monitoring client encounters that have been entered. Only designated staff in each program will have access to the report that they are authorized to use.

Report Title Contains:  **Go**

Report Catalog	
Title	Access
<a href="#">Admissions Client Demographics</a>	
<a href="#">Agency Client Movement</a>	
<a href="#">Client Demographic by Substance</a>	
<a href="#">Program Client Movement</a>	
<a href="#">Referrals in by Agency</a>	
<a href="#">Referrals out by Agency</a>	
<a href="#">Waitlist by Agency, Facility &amp; Program</a>	
QA/QC	
<a href="#">Program Enrollment Counts</a>	
<a href="#">Client List by Program</a>	
<a href="#">Agency/Facility Client Terminations</a>	
<a href="#">Unfinished Client Activities</a>	
Miscellaneous	
<a href="#">Admission Data</a>	
<a href="#">Client Profile Data</a>	
<a href="#">Combined Note Data</a>	
<a href="#">Wish Data Dictionary</a>	
<a href="#">Discharge Data</a>	
<a href="#">Encounter Data</a>	

**Encounter Data**

Agency: San Diego County

Encounter Start Date: From  To

Released to Billing: All

Released to Billing Date: From  To

Created Date: From  To

Updated Date: From  To

**On Screen** **Export** **Cancel**

1. Click on "Reports" from the Navigation Pane
2. Click "Encounter Data", from Miscellaneous
3. Enter Encounter Start Date "From" and "To"
4. Select "On Screen" to view the information on screen
5. Select "Export" to view on an Excel spreadsheet





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## **GLOSSARY**

ASAM	American Society of Addiction Medicine
BHS	Behavioral Health Services
CalOMS	California Outcomes Measurement System
DHCS	Department of Health Care Services
DMC	Drug Medi-Cal
EBP	Evidence Based Practices
FSN	Form Serial Number
HHSA	Health and Human Services Agency
IOS	Intensive Outpatient Services
MAT	Medication Assisted Treatment
ODS	Organized Delivery System
OS	Outpatient Services
OTP	Opioid Treatment Program
SanWITS	San Diego Web Infrastructure for Treatment Services
SUD	Substance Use Disorder
TX	Treatment
UCN	Unique Client Number



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## **CONTACT INFORMATION**

### **CalOMS, SanWITS, End User Support**

SUD\_MIS\_Support.HHSA@sdcounty.ca.gov

Phone: 619-584-5040

Fax: 1-855-975-4724

### **Clinical Processes and Documentation**

QIMatters.HHSA@sdcounty.ca.gov

### **General Billing and Training on Billing**

ADSBillingUnit.HHSA@sdcounty.ca.gov

### **SanWITS Training Registration**

[www.regpacks.com/DMC-ODS](http://www.regpacks.com/DMC-ODS)

1-800-834-3792 x3

### **CalOMS Tx Data Collection Guide & Dictionary, Manuals, and Forms**

[www.optumsandiego.com](http://www.optumsandiego.com)

Please consult with your facility manager and your resource packets prior to contacting the Support Desk.

