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# MIS SUBSTANCE USE DISORDER

## RESIDENTIAL BED MANAGEMENT, 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!**





## 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.



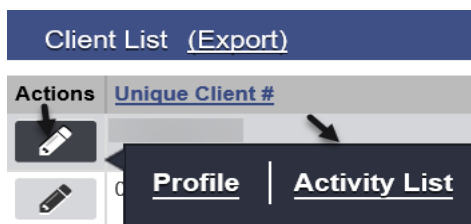
Complete the search parameters and click **GO** to search the client profile.

The Client Search form includes the following fields and controls:

- Agency: [ ]
- Facility: [ ]
- First Name: **Fake\***
- Last Name: **Clie\***
- SSN: **999\***
- DOB: [ ]
- SanWITS Training Client Id: [ ]
- Unique Client Number: **cf\***
- Provider Client ID: [ ]
- Treatment Staff: [ ]
- Primary Care Staff: [ ]
- Case Status: All Clients
- Intake Staff: [ ]
- Other Number: [ ]
- Number Type: [ ]
- Include Only Active Consents: Yes
- Buttons: Clear (red), Go (blue, highlighted with a black box)

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**.

Client List [\(Export\)](#)

Actions	Unique Client #

**Profile** | **Activity List**

Click **Payor Group Enrollment**.

Client List

- Client Profile
  - Alternate Names
  - Additional Information
  - Contact Info
  - Collateral Contacts
  - Other Numbers
  - History
  - Payor Group Enrollment**

At the Payor List screen, there should be two enrollments for residential facilities. Verify the accuracy of the plan, group and start date.

Payor List								<a href="#">Add Benefit Plan Enrollment</a>	<a href="#">Add Government Contract Enrollment</a>
Actions	Priority	Plan	Group	Subscriber/ Acct#	Subscriber/ Resp Party	Start Date	End Date		
		ODS DMC- Non Peri	Medi-Cal - Non Perinatal						
		ODS Residential	Residential Bed Day						



## **AUTHORIZATION**



**Notes:** 1) **Do NOT** enter an authorization, payor group enrollment, encounter, nor assign a County contracted residential bed to a **Non-BHS Contracted Client.** 2) **NO** authorization is required for Residential 3.2 Withdrawal Management.

Under the Organized Delivery System Drug Medi-Cal (ODS DMC), an authorization is required for residential stays for clients with Medi-Cal eligibility. The authorization request must be sent to Optum, and an approval must be received before the client can be enrolled to the program.

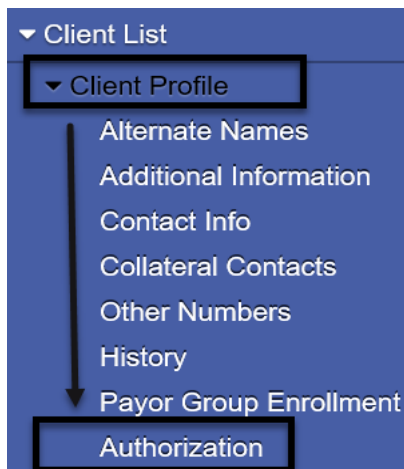
After receiving the initial 15-day level of care request from the residential facility, Optum will respond within 24 hours. The authorization may be approved, denied or have a different level of care approved. Within ten days after the initial authorization was approved, an authorization request for the remaining 75-day continuing services must be submitted to Optum. Optum will respond within five business days from the date of receipt of the request.

Request	Days Requesting	Response
Initial Request	15	Within 24 Hours
Subsequent Request	75	Within 5 Business Days

Prior to adding the authorization into SanWITS, ensure the client has a completed Client Profile, Intake, and Payor Group Enrollment.

**Adding an Authorization:** To add an authorization from the navigation pane:

Click Client Profile → Authorization





To the right of Authorization List, click **Add New Authorization Record**.



Complete the required fields on the Authorization screen. Some of the fields are system generated.

**Government Enrollment:** Select Residential Bed Day if DMC or County Billable.

**Plan:** Populates with ODS Residential.

**Authorization #:** The unique authorization number is system generated.

**Effective Date:** Enter the start date of the authorization.

**End Date:** The end date must correspond to the number of units authorized.

**Status:** Prepopulates to Active. When saved, it will change to provisional.

**Authorization**

Group Enrollment	<input type="text" value=""/>	Status	Active
Plan	<input type="text" value=""/>	Contract	<input type="text" value=""/>
Authorization #	<input type="text" value=""/>	Date Approved	<input type="text" value=""/>
Administering Agency	Residential Train	Updated Date	<input type="text" value=""/>
Effective Date	<input type="text" value=""/>	Updated By	<input type="text" value=""/>
End Date	<input type="text" value=""/>		

Comments

Click **Save**, but do not click Finish. Saving is required to proceed to the next step.



A service must be added for each authorization entered. To add a service, to the right of the Authorized Services List, click **Add Service**.







Complete the Authorized Services screen.

**Service:** Select the level of care for the service, e.g. Residential Bed Day 3.1.

**Authorization #:** Prepopulates with the number assigned to the authorization.

**# Authorized Units:** Enter the number of days for which the client was approved.

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

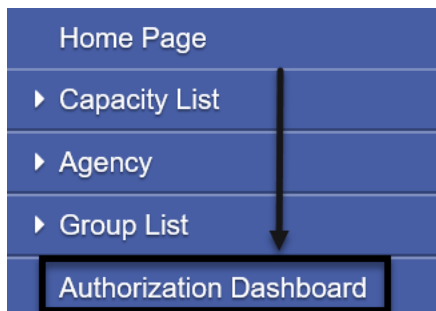
The service request appears in the Authorization List and remains in Provisional status until it is approved. The user has the ability to make changes to the dates if needed. However, once it is approved, the status changes to Active and cannot be edited.

Authorization List						
Actions	Auth #	Payor	Status	Effective Date	End Date	Authorized
			Provisional			
			Active			

## Authorization Dashboard

The status of any authorization entered into the system can be viewed. To look up the status of an authorization, from the navigation pane:

Click **Authorization Dashboard**





## Searching for a Previously Entered Authorization

The Authorization Dashboard prepopulates all authorizations that have been entered. To search for a specific authorization, complete one or more of the search parameters, and click **GO**.

**Authorization Dashboard Search**

Client First Name  Client Last Name  Provider Agency Residential Train

Unique Client Number  Facility

Authorization #  Payor Group  Contracting Agency

Auth Effective Date  Change Request Date  Administering Agency

Auth End Date  Last Update  Plan

Auth Status  Request Updated By

Change Request Status

Primary Staff  Selected Staff

ASAM LOC

To sort the list, click on the subject header. To download the list to an Excel spreadsheet, click **Export**. To open and view an authorization, click the authorization number under the Auth # column.

**Authorization Dashboard (Export)**

<a href="#">Auth #</a>	<a href="#">Auth Status</a>	<a href="#">Client Name</a>	<a href="#">Auth Effective Date</a>	<a href="#">Auth End Date</a>	<a href="#">ASAM LOC</a>	<a href="#">Last Update</a>				
<a href="#">107720</a>	Provisional						Res			
	Closed						Res			
	Provisional						Res			
	Denied						Res			
	Active						Res			

## NOTES



## VERIFYING BED AVAILABILITY

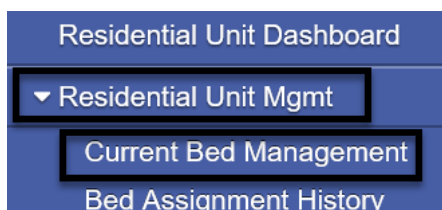


**Notes:** 1) In order to enroll a client into the program, there must be an **available bed**. 2) Bed assignments need to be in **chronological** order.

Program staff may not assign a client to a bed if the system shows another client has been assigned to the bed. Clients who were discharged in person but have not yet been discharged in SanWITS still occupy beds. It is best to discharge the clients promptly in SanWITS in order to have an accurate count of available beds.

The Residential Unit Management was implemented to assist in managing the residential beds. Users are able to obtain information on historical bed assignments and current bed availability. To verify bed availability, from the navigation pane:

Click Residential Unit Mgmt → Current Bed Management



Select the Inpatient Unit, and click **GO**.

The Current Bed Management List displays available rooms and beds for today's date.

Actions	Facility	Inpatient Unit	Room #	Bed # / Status	Virtual Bed
	RES Train 2		<a href="#">1-Female</a>	1, Vacant	No
	RES Train 2		<a href="#">1-Female</a>	2, Vacant	No
	RES Train 2		<a href="#">1-Female</a>	3, Vacant	No



## PROGRAM ENROLLMENT

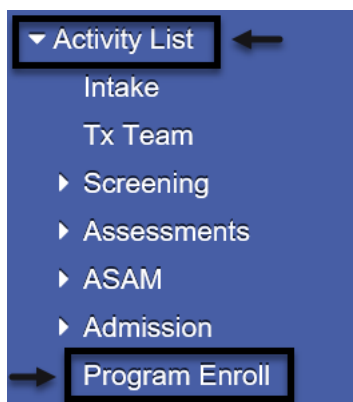


**Notes:** 1) Availability of a bed **MUST** first be checked before adding a program enrollment in the system. 2) Enter a program enrollment for a **Non-BHS Contracted Client** for monitoring purposes. 3) Open a program enrollment for **Recovery Services** if the facility provides recovery services. Authorization and Admission are not required for recovery services. 4) When **changing level of care (LOC)**, close the existing LOC program enrollment before opening a new program enrollment 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  Facility

Modality

From:  To:

Active Program Enrollments During Date Range



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



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

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

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

**Start Time:** Enter the time the client is admitted to the facility. Start time field is activated only after selecting the program name. If the field is not yellow, the program name field is blank.

**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**.

Review to ensure that all fields have correct information. If everything is accurate, click **Save**.



After clicking save, the bed assignment window opens immediately. The staff cannot return to the program enrollment screen, and the client must be assigned to a bed. Bed assignment is covered next on a separate section of this manual.



## BED ASSIGNMENT

After saving the program enrollment, the Bed Assignment window opens immediately, and the user must assign the client to a bed.

Select the Inpatient Unit and click **GO** to view the bed vacancies.

Bed Assignment for

Facility: RES Train 2      Room #:

Inpatient Unit:  ←      Bed #:

Bed Status: Vacant

Virtual Bed: No

Buttons: Finish, Clear, **Go** (highlighted), ▶

A bed may be assigned using the pen in the Actions column. However, it is best practice to click the link under the Room # to assign the client to a bed. This allows the staff to view the room and the other occupants within the room as well as any general comments for each client.

Bed Assignment						
Actions	<u>Inpatient Unit</u>	<u>Room #</u>	<u>Bed #</u>	<u>Bed Status</u>	<u>Virtual Bed</u>	
		<a href="#">30 A-Male</a>	2	Vacant	No	
		<a href="#">30 A-Male</a>	3	Vacant	No	
		<a href="#">30 A-Male</a>	4	Vacant	No	

### Bed Assignment through Room #:

The Room Details window provides a full view of all clients assigned to a bed in that Unit. The general comments about the client can be viewed on this window. The bed # is located on the top left, and the link to assign on the bottom left.



To assign the client to a bed, find the correct bed # and click **Assign Bed**.

In the bed details window, enter the Expected Date of Discharge. Client characteristic and general comments can also be added.

Click **Save**.



After saving, the system closes the bed details window and displays a confirmation screen. If the room assigned is incorrect, click No to return to the bed assignment window. To confirm the selection of the room and bed assignment, click **Yes**.

You are about to assign [redacted] to Bed # [redacted], Room # [redacted]. Are you sure?

Yes No

### Bed Assignment through Actions:

A bed may also be assigned to a client through the Actions column. This method should only be used if the staff is fully aware of the room details, such as upper and lower bunks, other occupants and general comments. To assign the client to a bed under Actions:

Hover over the pen for the selected bed for the client, and click **Assign**.

Bed Assignment					
Actions	Inpatient Unit	Room #	Bed #	Bed Status	Virtual Bed
				Vacant	No
				Vacant	No

In the bed details window, enter the Expected Date of Discharge. Client characteristic and general comments can also be added.

Click **Save**.

Bed # . Details	
Inpatient Unit [redacted]	Bed # [redacted]
Room [redacted]	Bed Status Vacant
<b>Client Bed Attributes</b>	
Client Name [redacted]	Client MPI [redacted]
Gender [redacted]	Sexual Orientation [redacted]
Language English	Medical Acuity [redacted]
Client's characteristics [text area]	Violence [redacted]
	Bed Assignment Date 3/1/2020 Time 8:00 AM
General Comments [text area]	Expected Date of Discharge [yellow box]
	<div style="text-align: right;"> <span>Cancel</span> <span style="border: 2px solid green; padding: 2px;">Save</span> <span>Finish</span> </div>





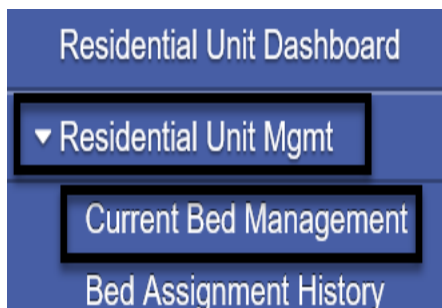
After saving, the system closes the bed details window and displays a confirmation screen. If the room assigned is incorrect, click No to return to the bed assignment window. To confirm the selection of the room and bed assigned to the client, click **Yes**.

You are about to assign [redacted] to Bed # [redacted], Room # [redacted]. Are you sure?

### Moving a Client to Another Bed

There may be times when a client needs to be moved within the unit. However, before moving a client to another bed, make sure **all actions** are completed in **chronological** order, including client level of care changes and current bed assignments. To move a client to another bed, on the navigation pane:

Click Residential Unit Mgmt → Current Bed Management



Select the Inpatient Unit, and click **GO**.

Current Bed Management Search

Agency	Residential Train	Client First Name	<input type="text"/>
Facility	RES Train 2	Client Last Name	<input type="text"/>
Inpatient Unit	<input type="text"/>	Expected Date of Discharge	<input type="text"/>
Room #	<input type="text"/>	Bed #	<input type="text"/>
Bed Status	<input type="text"/>		



Look up the client's name from the Current Bed Management List. **Hover** over the pen in Actions, and click **Move**.

Current Bed Management List <a href="#">(Export)</a>									
Actions	Facility	Inpatient Unit	Room #	Bed # / Status	Virtual Bed	Program Enrollment	Client	Client Name	Exp Disc
				Vacant	No				
				Occupied	No	RES Train 2/ODS 3.1 RES			
				Occupied	No	RES Train 2/ODS 3.1 RES			

The Bed Re-Assignment window appears. Two options are available for re-assigning a client to a bed. The client can be moved to a vacant bed or swapped with a client who is occupying a bed.

**A) Re-assign client to a vacant bed:** Hover over the pen in Actions, and click **Assign**.

Bed Re-Assignment				
Actions	Inpatient Unit	Room #	Bed #	Status
				Vacant
				Vacant

The Bed # Details window launches. Complete the required fields.

**Bed Assignment Date:** Prepopulated with today's date. Change, if needed.

**Time:** Prepopulated with current time. Change as needed.

**Expected Date of Discharge:** Review and change if needed.

Bed #	Details
Inpatient Unit	Bed #
Room	Bed Status Vacant
<b>Client Bed Attributes</b>	
Client Name	Client MPI
Client's characteristics	Bed Assignment Date <b>3/19/2020</b> Time <b>4:31 PM</b>
	Expected Date of Discharge



Click **Save** to confirm the transfer.



**B) Re-Assign client to an occupied bed:** A client's bed can be swapped with another client's bed. To do this, hover over the pen in Actions , and click **Swap**.

Bed Re-Assignment						
Actions	Inpatient Unit	Room #	Bed #	Status	Virtual Bed	Client Name
				Occupied	No	
				Occupied	No	

A confirmation screen displays the names of the clients, today's date and the current time. Update the date and time as needed. If the client names are inaccurate, click No. If the information is accurate, click Yes to complete the swap.

You are about to swap beds between \_\_\_\_\_ and \_\_\_\_\_. Do you want to continue?

Bed Assignment Date

Bed Assignment Time

## NOTES

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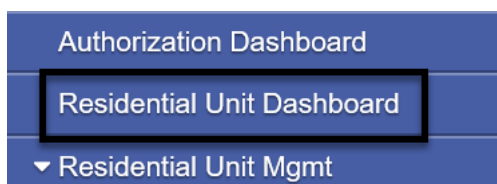
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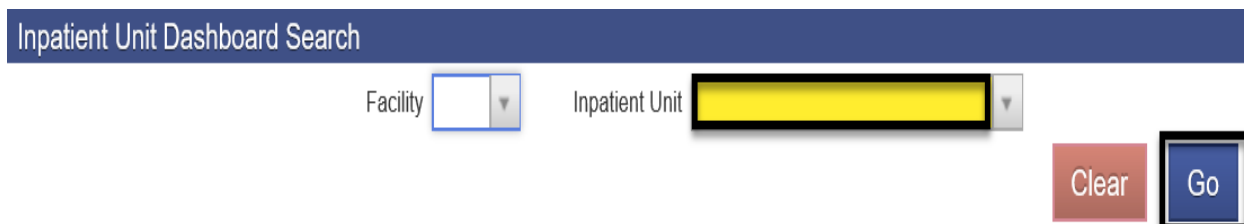
## Client Leave

A client may be on leave for anywhere between 24 hours and 7 days. Contact your County Program Coordinator if leave is more than 7 days. If the client has not returned on the 8<sup>th</sup> day, the client must be discharged. *A client on leave should not be included in the census.* To place a client on leave, from the navigation pane:

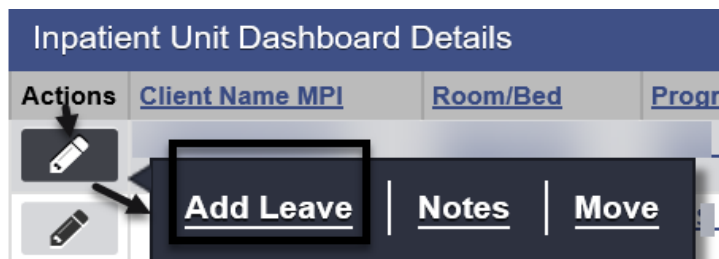
Click Residential Unit Dashboard.



Select the Inpatient Unit, and click **GO**.



At the bottom of the Inpatient Unit Dashboard Search screen is the Inpatient Unit Dashboard Details. Hover over the pen in Actions, and click **Add Leave**.



Complete the Client Leave Details fields to continue.

**Leave Type:** Select the type of leave from the drop down menu.

**Hold Client's bed?:** Defaults to Yes. Selecting No will show the bed as vacant and available for re-assignment.

**Leave Start Date:** Enter the date the client begins the leave.

**Leave Start Time:** Enter the time the client's leave begins.



**Expected Return Date:** Optional, but it is best to enter for tracking purposes.

**Expected Return Time:** Optional, but it is best to enter for tracking purposes.

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

**Client Leave Details**

Leave Type: [Yellow dropdown] Description: [Grey dropdown] Hold Client's bed?: [Yes dropdown]

Leave Start Date: [Yellow calendar] Leave Start Time: [Yellow dropdown] Expected Return Date: [White calendar] Expected Return Time: [White dropdown]

Leave End Date: [White calendar] Leave End Time: [White dropdown]

Notes: [Text area]

[Cancel] [Save] [Finish]

The Client Leave List for Program Enrollment window displays the information that was entered. The expected date and time of return may be updated from this screen.

**Client Leave List for Program Enrollment - RES Train 2/ODS 3.1 RES :**

Actions	Leave Type	Leave Start Date and Time	Expected Return Date and Time
	Day Pass	03/15/2020 3:00 PM	03/16/2020 2:00 PM

To change the expected return date and time, hover over the pen in Actions and click Review. The Client Leave Details screen re-opens. Change the expected return date and expected return time fields, and click Save and Finish.

**Client Leave List for Program Enrollment -**

Actions	Leave Type	Leave Start Date and Time	Expected Return Date and Time
<b>Review</b>	Day Pass	03/15/2020 3:00 PM	03/20/2020 2:00 PM

Click **Finish** again to return to the Inpatient Unit Dashboard window.





The Inpatient Unit Dashboard Details lists the clients who are on leave.

The leave status color is blue if the client is out but still within the expected date of return. The status color is red if the client failed to return on the expected return date and time.

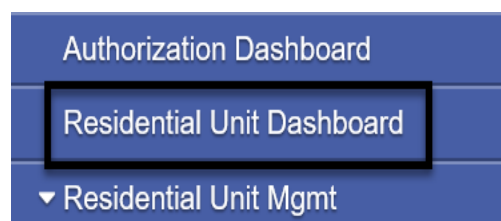
Inpatient Unit Dashboard Search

Inpatient Unit Dashboard Details

Actions	Client Name MPI	Room/Bed	Program Enrollment	Admission Date	Primary Clinician	Attending Physician	Leave Status
			<a href="#">RES Train 2/ODS 3.1</a>		<a href="#">Staff, Rendering</a>	→	<a href="#">Day Pass</a>
			<a href="#">RES Train 2/ODS 3.1</a>		<a href="#">Staff, Rendering</a>	→	<a href="#">Day Pass</a>

**Client Leave Ends:** When the client returns, update the system so that the client may be included in the daily census. To end the client's leave, from the navigation pane:

Click Residential Unit Dashboard.



Select the Inpatient Unit, and click **GO**.

Inpatient Unit Dashboard Search

Facility

Inpatient Unit

Clear



At the bottom of the Inpatient Unit Dashboard Search screen is the Inpatient Unit Dashboard Details. Click the **Day Pass** link under the Leave Status column.

Inpatient Unit Dashboard Details							
Actions	Client Name MPI	Room/Bed	Program Enrollment	Admission Date	Prim:	Physician	Leave Status
							<b>Day Pass</b>

Enter the date and time the client returned from leave in the Leave End Date and Leave End Time fields.

Client Leave Details							
Leave Type	Day Pass	Description		Hold Client's bed?	Yes		
Leave Start Date	3/15/2020	Leave Start Time	3:00 PM	Expected Return Date	3/20/2020	Expected Return Time	2:00 PM
Leave End Date	<input type="text"/>	Leave End Time	<input type="text"/>				
Notes	<input type="text"/>						

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



Click **Finish** again.



**Note:** A client on leave should not be included in the census.

## NOTES

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## DAILY CENSUS

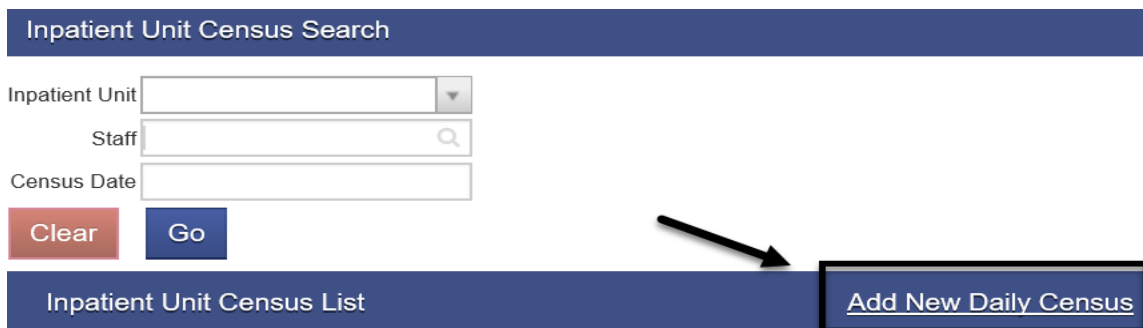
The Residential Unit Census creates bulk encounters for all selected clients that currently occupy a bed. A daily census must be completed for the previous day.

**Entering Daily Census:** To create a daily census from the navigation pane:

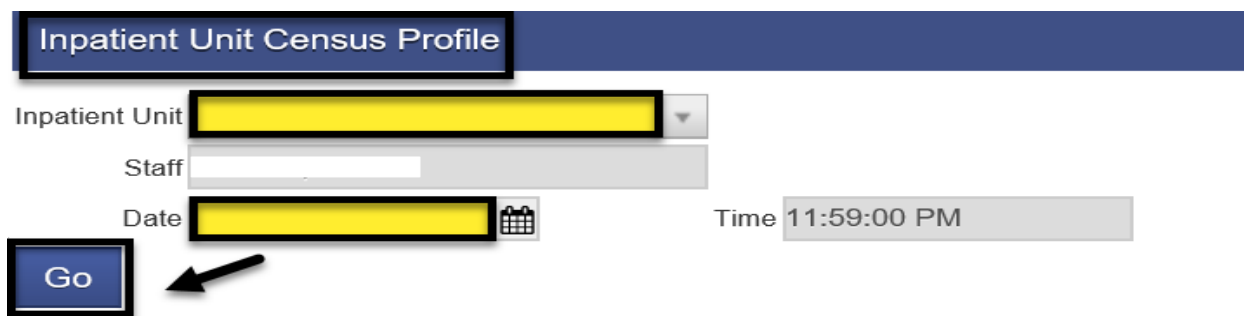
Click Residential Unit Mgmt → Residential Unit Census



Click **Add New Daily Census**.



Select the Inpatient Unit from the drop down menu, enter the date of your Census and click **GO**.







The Inpatient Unit Census lists all the clients with an open bed assignment. Clients with open leave records should have their leave records ended to be included in the Census. The Census creates an encounter for each person selected.

Click the top box to select all clients, or select clients individually by clicking on the box next to their name.

Click **Create New Census**.

**Inpatient Unit Census**

<input type="checkbox"/>	<u>Client Name</u>	<u>MPI</u>	<u>Room/Bed</u>	<u>Leave Status</u>
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Client leave must end before client can be included in the Census → Day Pass

The Inpatient Unit Census List shows the unit that was selected, the date and time of the Census, and the staff who created it.

**Inpatient Unit Census Search**

Inpatient Unit

Staff

Census Date

---

**Inpatient Unit Census List** [Add New Daily Census](#)

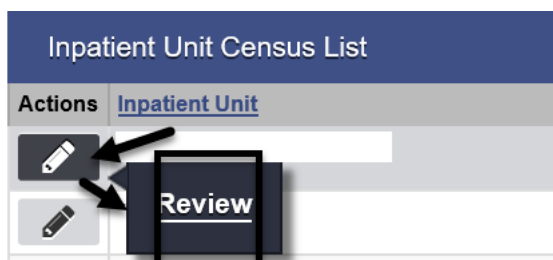
Actions	<u>Inpatient Unit</u>	<u>Census Date/Time</u>	<u>Staff</u>
			Staff, Rendering



## Updating an Existing Census

A Census that has already been created can be updated. To update an existing Census, hover over the pen in Action:

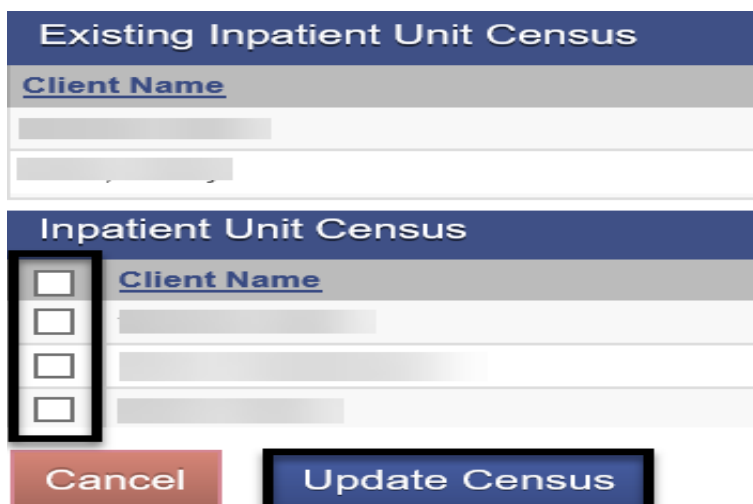
Click **Review**



**Inpatient Unit Census:** The clients that have open assignments are displayed on the list, including the clients that were selected for the current Census, clients with an existing leave, and any newly added clients.

To update the existing Census with a client that was not originally added, update the **entire** Census. The missing client and all clients that were originally selected will need to be selected again. It is **not enough** to only select the missing client. The Census will update with all newly selected clients.

To update the census, place a **check mark** on all clients who should be included in the census. Click **Update Census**.

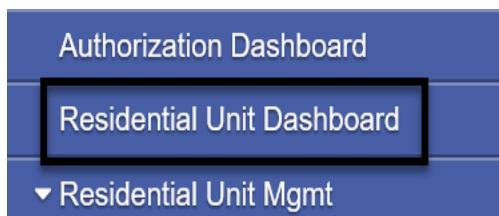




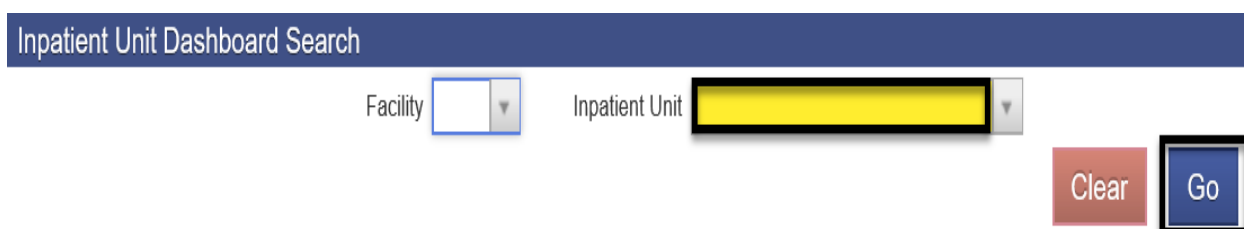
## Updating Daily Census Notes (Bed Day Encounters)

After the bulk encounters are created, update the individual client encounters. To update the encounter, from the navigation pane:

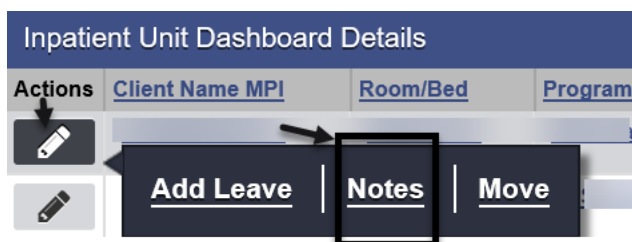
Click Residential Unit Dashboard.



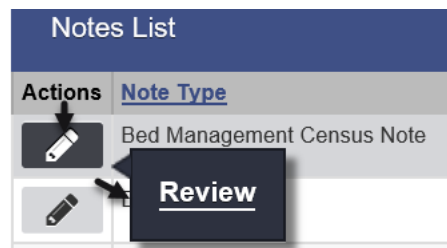
Select the Inpatient Unit, and click **GO**.



Hover over the pen in Actions, and click **Notes** (Notes refers to Encounters).



In the Notes List screen, hover over the pen in Actions, and click **Review**.





**Reviewing the Encounter:** Review the entire encounter for accuracy.

**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.

**Enc ID:** The system generates the Enc ID

**Census ID:** The system generates the Census ID.

**Program Name:** Prepopulated with the facility name the user is logged into.

**Service:** Defaults to the approved level of care (LOC).

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

**Start Date:** Defaults to the date of the census that was created.

**Service Location:** Defaults to residential substance abuse treatment facility.

The screenshot displays a user interface for managing encounters. At the top, a blue navigation bar shows 'Encounter' with navigation arrows and '6 of 6'. Below this, several fields are visible: 'Note Type' is set to 'Bed Management Census Note'; 'ENC ID' is a greyed-out text field; 'Program Name' is 'RES Train 2/ODS 3.1 RES'; 'Service' is 'Residential Bed Day 3.1'; 'Billable' is set to 'Yes'; 'Census ID' is a greyed-out text field; 'Start Date' and 'End Date' are date pickers; 'Service Location' is 'Residential Substance Abuse TX Facility'; 'Start Time' and 'End Time' are time pickers; and 'Duration' is a numeric input field with a dropdown arrow.

**Contact Type:** Defaults to Face to Face, which is correct.

**# of Service Units/Sessions:** Defaults to 1. This is accurate.

**Medi-Cal Billable:** Defaults to **No**, which is accurate. Verification goes through Contract Management.

**Pregnant/Postpartum:** Defaults to No for male clients. For female clients, select Yes or No.



**Was an Interpreter used?:** Review and change if needed.

**In what language was the service provided?:** Review and change if needed.

Contact Type: Face To Face

Emergency:

# of Service Units/Sessions: 1

Visit Type: BD-Bed Day - Residential

Medi-Cal Billable: No

Pregnant/Postpartum: No

Was an interpreter used?: No Interpreter Needed

In what language was the service provided?: English

**Which Evidence Based Practices were used:** Defaults to **None**. Do not change the answer because none is correct.

**Diagnosis for this Service:** Prepopulated with the primary diagnosis and is read only.

Which Evidence-Based Practices were used?

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

**Diagnoses for this Service**

Primary	F10.19-Alcohol abuse with unspecified alcohol-induced disorder(ICD)
Secondary	
Tertiary	

**Rendering Staff:** Prepopulated with the user’s name and should show the name of a counselor or LPHA. The rendering staff must have a valid National Provider Identifier (NPI).

**Release To Billing:** Generates a claim.





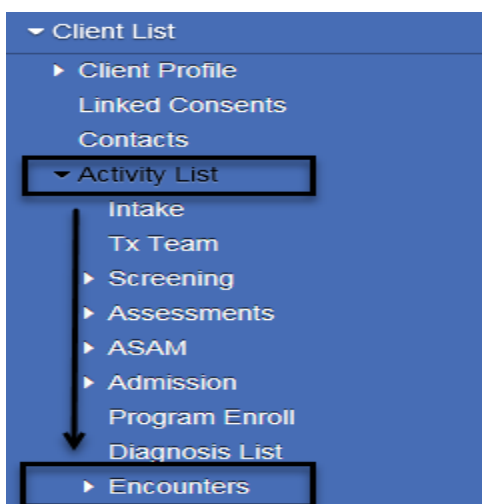
## CASE MANAGEMENT ENCOUNTERS



**Notes:** 1) Residential bed day (RBD) encounters **must** be created through the Daily Census. All encounters should be completed on a **daily** basis. 2) Although you have 7 days to enter case management encounters, the recommendation is to enter these encounters daily. 2) Do **not** enter encounters for Non-BHS Contracted Clients.

Case management service encounters that were provided to residential clients are entered as individual encounters and not through the daily census. Case management encounters do not require a separate authorization and must be entered into the system, regardless if billable or not. To search or enter an encounter, from the Client List 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  → End Date

Rendering Staff

Encounter Status

Allow Disclosure of Note

Service

Program

Group Session ID

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

Review | Clone

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

Note Type: DMC Billable

ENC ID:

Program Name: RES Train 2/ODS 3.1 RES

Service: Case Management 3.1 RES

Service Location: Residential Substance Abuse TX Facility

Travel Duration: 0 Min

Session Duration: 60 Min

Contact Type: Face To Face

Emergency:

Pregnant/Postpartum: No

Was an interpreter used? No

Which Evidence-Based Practices were used? Nonc Other

Diagnoses for this Service: Primary F10.11-Alcohol abuse, in remission(ICD)

Rendering Staff:

Released To Billing Date: 3/15/2020 5:57 PM

Created Date: 2/15/2020 5:58 AM

Cancel Save Finish





## Adding an Encounter

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

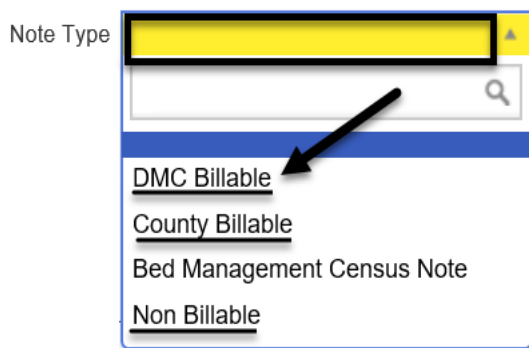


At the Encounters window, click **Add Encounter**.



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  Yes  
 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).

**Documentation Duration:** Enter time in minutes.

**Session Duration:** This field displays for services that are duration based, such as case management services. Enter the total session time with the client.

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

Travel Duration  Min  
Session Duration  Min  
Documentation 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 in providing 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).

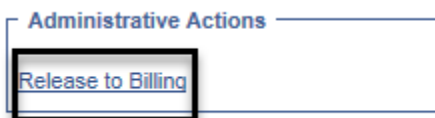
Rendering Staff

Click **Save**.

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



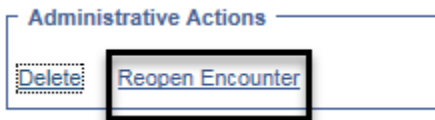
## Administrative Actions



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.

If one of the administrative actions is selected, the system closes the encounter screen. If none of the administrative actions is selected, click **Finish** to go back to the main encounters page.



## NOTES

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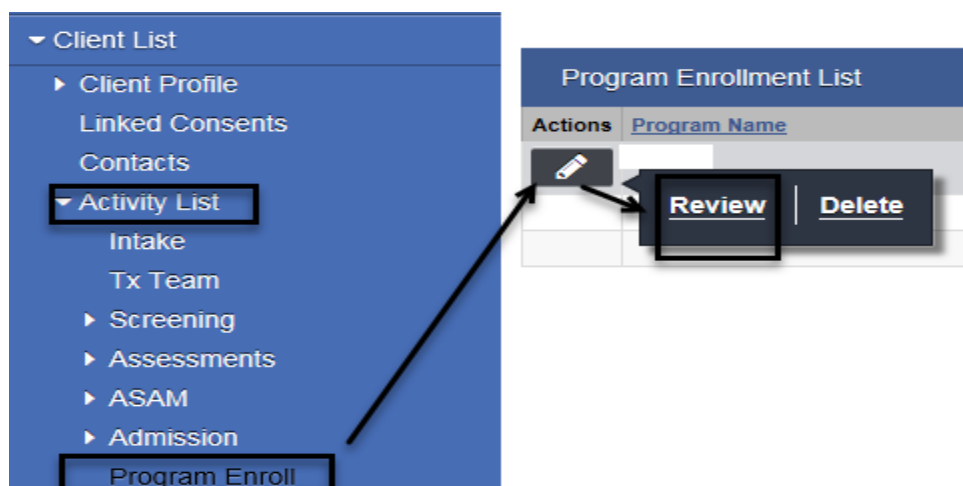


## ENDING PROGRAM ENROLLMENT

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**, **Next Step** and enter comments on the **Notes** field.

Program Enrollment Profile

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

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





## Changing Level of Care (LOC)

- 1) If a client changes LOC from Residential **3.2 WM** to Residential Service **3.1/3.5** or vice versa, end the program enrollment, complete the Discharge, and close the treatment episode. After closing the case, open a program enrollment for the new LOC under a **new episode**. To open a new treatment episode, refer to the Intake and Episode Section of the Intro to Admin Functions Training Manual.
- 2) If a client changes LOC from Residential Service **3.1** to Residential Service **3.5** or vice versa, there **must** be an updated ASAM, authorization, and a new program enrollment. Close the existing program enrollment first before opening a program enrollment for the new LOC within the **same episode**.

Example: A client changes LOC from Residential Service 3.1 to Residential Service 3.5. Close the ODS 3.1 RES program enrollment on the date of LOC change.

**End Date:** Enter the last date of the existing LOC.

**End Time:** Enter **11:59 PM**.

**Termination Reason:** Select **9 Transferred to another program at this facility**.

**Next Step:** When changing LOC, there are two options for the next step: Assign the client to a different bed or keep the client in the same bed. Select one of the options, and click **Save**.

Program Enrollment Profile

Facility: RES Train 2

Program Name: ODS 3.5 RES

Program Staff: Staff, Rendering

Perinatal: No

Termination Reason: 9-Transferred to another program at this facility

Next Step: [Dropdown menu open]

Notes: [Text area]

Administrative Actions: [List of actions]

Buttons: Cancel, Save, Finish



**A) Assign the client to a different bed:** When selecting the option to assign the client to a different bed, the program enrollment window re-opens to enroll the client to the new program.

The Start Date and Start Time prepopulated with **one (1) minute** added to the End Date/**End Time** of the previous LOC.

It is important to end the previous LOC's program enrollment at **11:59 PM**, so that the new LOC program enrollment **Start Time** is at **12:00 AM** the following day.

Select the program name for the new LOC, and click **Save**.

**Program Enrollment Profile**

Facility: RES Train 2      Start Date: 3/16/2020      Start Time: 12:00 AM

Program Name: [Yellow dropdown]      End Date: [Grey]      End Time: [Grey]

Program Staff: Staff, Rendering      PS Court Phase: [Grey]

Perinatal: No

Termination Reason: [Grey]

Notes: [Text area]

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**Administrative Actions**

Cancel    **Save**    Finish

The Bed Assignment screen immediately launches. To assign the client to a different bed, hover over the pen for the selected bed for the client, and click **Assign**.

**Bed Assignment**

Actions	Inpatient Unit	Room #	Bed #	Bed Status	Virtual Bed
				Vacant	No
				Vacant	No

**Assign**





In the bed details window, enter the expected date of discharge, and click **Save**.

Bed Assignment Date  Time   
Expected Date of Discharge

On the confirmation screen, click **Yes** to confirm the new bed assignment of the client.

You are about to assign  to Bed # , Room # . Are you sure?

**B) Keep the client in the same bed:** When selecting the option to keep the client in the same bed, the program enrollment window re-opens to enroll the client to the new program.

The Start Date and Start Time prepopulated with **one (1) minute added** to the End Date/**End Time** of the previous LOC.

It is important to end the previous LOC's program enrollment at **11:59 PM**, so that the new LOC program enrollment **Start Time** is at **12:00 AM** the following day.

Select the program name for the new LOC. Click **Save** and **Finish**.

**Program Enrollment Profile**

Facility  Start Date  Start Time   
Program Name  End Date  End Time   
Program Staff  PS Court Phase   
Perinatal   
Termination Reason   
Notes

**Administrative Actions**



## 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.

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

Program Enrollment Profile

Facility

Program Name **Non BHS Contracted Client**

## NOTES

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## DISCHARGE

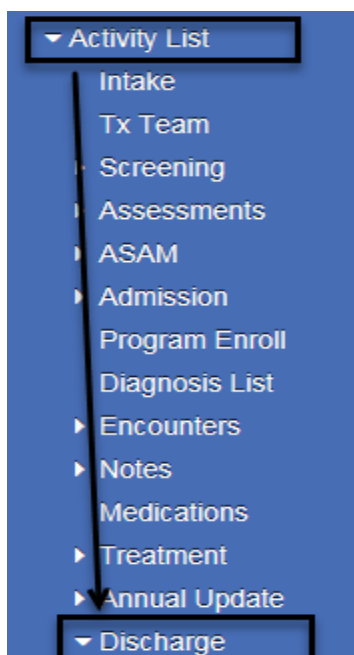


**Note:** A program enrollment **must** be ended prior to completing a client discharge.

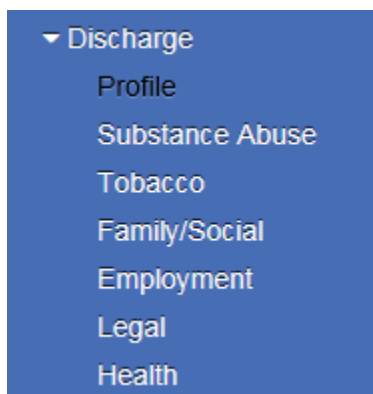
If there is any change in LOC, client leave, or bed movement, these activities must be recorded in chronological order and must be completed before discharging the client.

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


Selected Ancillary Services

**Record Status**

Record Created By  Created Date

Last Updated By  Last Updated Date

CalOMS Form Serial #  Last Upload to State Date

[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 (LOC) is changed from Residential Service 3.1/3.5 to IOS or Recovery Services. **2)** Complete a Discharge record when changing LOC from Residential 3.2 WM to Residential Service 3.1/3.5 and vice versa. After a Discharge record is completed, open a new episode for the new level of care. **3)** After a Discharge record is completed and the client returns to the program, open a new episode for the re-admission, even if the LOC is the same as the prior admission.



## 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 treatment episode. An authorization is not required for recovery services.

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**.

**Program Enrollment Profile**

Facility

Program Name **Recovery Services**

Program Staff

PS Court Phase

Perinatal

Termination Reason

Notes

Start Date

End Date

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**Administrative Actions**

## NOTES

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## **GROUP LIST (FOR GROUP RECOVERY SERVICES)**



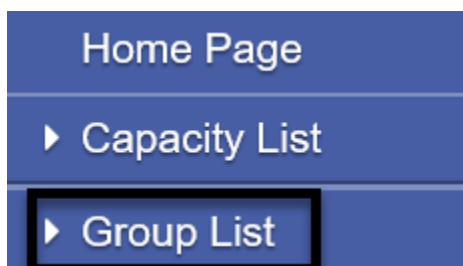
**Notes:** 1) The Group List **must** be used to create **bulk** encounters for individuals who attended a group session for **Recovery Services**. 2) If a Non-BHS Contracted Client attended a group session, mark the client as present but do **not** create an encounter. 3) **Group size** is a minimum 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. **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](#)

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

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



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**.

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

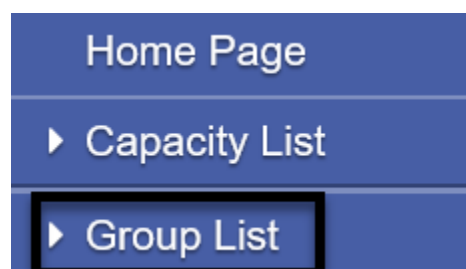
After all members have been added to the group, click **Finish**.



## 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**.

The screenshot shows the 'Group Profile List' window. At the top is a 'Group Profile Search' section with a 'Type' dropdown and a 'Lead Staff' input field. Below is a table with columns 'Actions', 'Group Name', and 'Group Type'. A pen icon in the 'Actions' column is highlighted, and a context menu is open with options: 'Review', 'Delete', 'Session List', and 'Group Roster'. Arrows point from the pen icon to the 'Group Roster' option.

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

The screenshot shows the 'Roster' screen with a table containing 'Actions', 'Client Name', and 'Program' columns. A pen icon in the 'Actions' column is highlighted, and a context menu is open with options: 'Review' and 'Remove'. A box highlights the 'Review' option, and an arrow points from the pen icon to it.

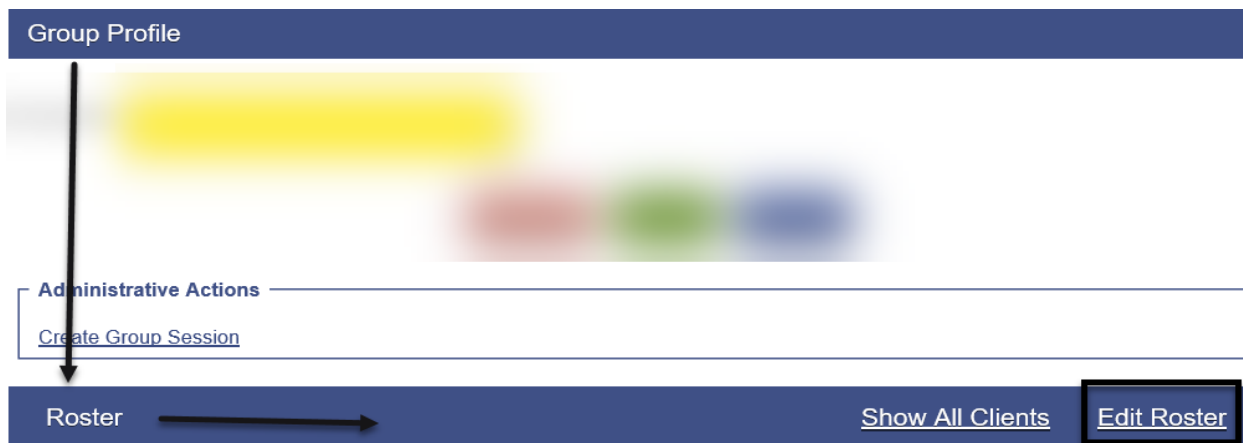
Select the appropriate status and enter the status effective date and the reason.

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

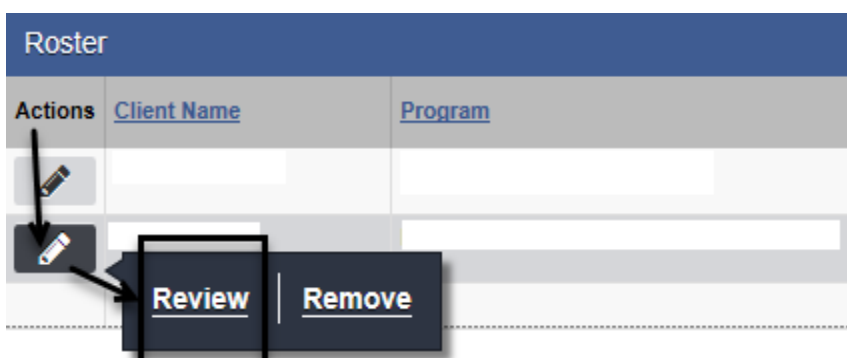
The screenshot shows the 'Add Member' form. It includes fields for 'Client Name', 'Program', '# of Sessions Approved', '# of Sessions Attended' (with the value '4'), 'Client Due', 'Status' (with 'Active' selected), 'Status Effective Date' (with a calendar icon), and 'Reason'. At the bottom right are three buttons: 'Cancel', 'Save', and 'Finish'. The 'Save' and 'Finish' buttons are highlighted with boxes.



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

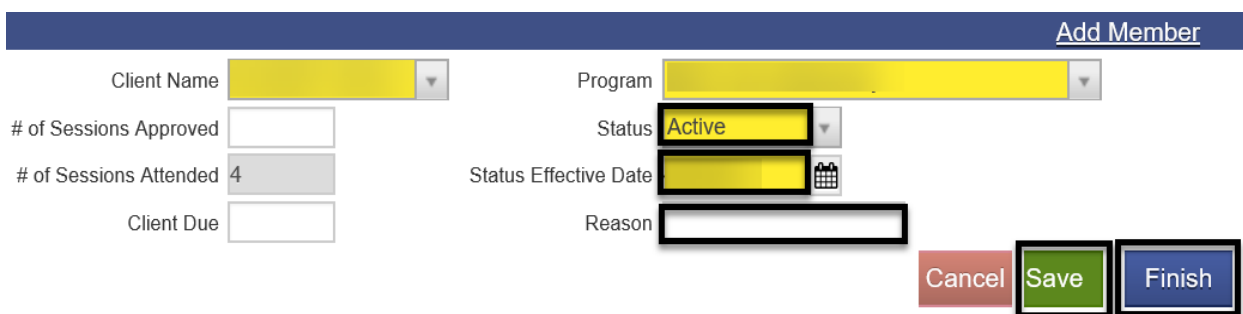


At the Roster screen, hover over the pen in Actions next to the client's name and click **Review**.



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

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

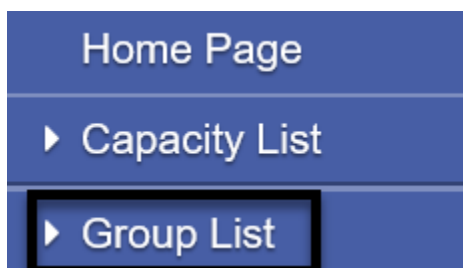




## Searching a Group Profile

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

Click **Group List**.



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

Group Profile Search

Type  Lead Staff  Active Yes



**Go**

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
		
	<a href="#">Review</a>	<a href="#">Delete</a>   <a href="#">Session List</a>   <a href="#">Group Roster</a>



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

**Group Profile**

Group Name	<input type="text" value=""/>	Start Date	<input type="text" value=""/>	End Date	<input type="text" value=""/>
Group Type	<input type="text" value=""/>	Day of Week	<input type="text" value=""/>	Time of Day	<input type="text" value="8:00 AM"/>
Lead Staff	<input type="text" value=""/>	Room Location	<input type="text" value=""/>		
Facility	<input type="text" value=""/>				

Co-Lead Staff	<input type="text" value=""/>	Selected Co-Lead Staff	<input type="text" value=""/>
	<input type="button" value="↑"/> <input type="button" value="→"/>		<input type="button" value="↑"/>
	<input type="button" value="↓"/> <input type="button" value="←"/>		<input type="button" value="↓"/>

Description

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**Administrative Actions**

[Create Group Session](#) ←

## NOTES

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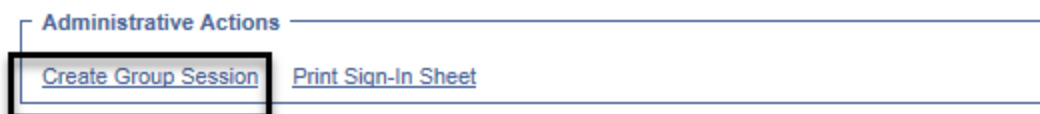


## GROUP BULK ENCOUNTERS

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

Group recovery services 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.

**Travel Duration:** Enter the clinician's travel time, if applicable. Enter 0 if there is no travel time.

**Session Duration:** Enter the group session duration in minutes.

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

**Location:** Select the residential facility.



**Service:** 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: Recovery Services Group

Note Type: DMC Billable Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

Billable: Yes Start Time: 8:00 AM End Time: \_\_\_\_\_

Calculate ODS units: Yes

Travel Duration: \_\_\_\_\_ Min Session Duration: \_\_\_\_\_ Min

Lead Staff: Staff, Rendering Total Duration: \_\_\_\_\_ Min

# of Service Units/Sessions: 1

Location: Residential Substance Abuse TX Facility

Service: \*\*Recovery Service Group

Co-Lead Staff: \_\_\_\_\_ Selected Co-Lead Staff: \_\_\_\_\_

Note: Recovery Services

Administrative Actions: \_\_\_\_\_

Cancel Save Finish

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

## NOTES

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## 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"/>		

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**

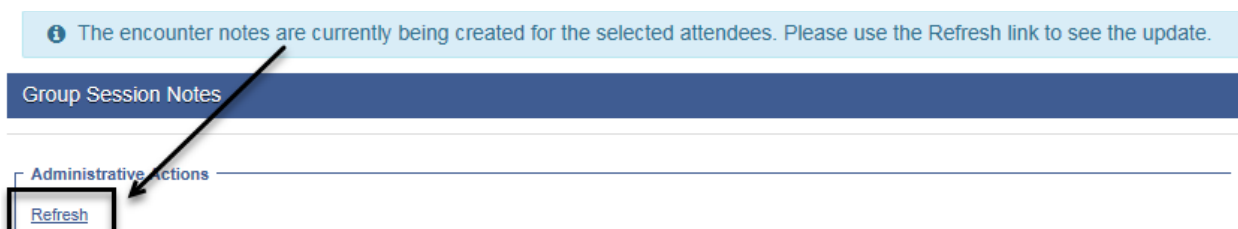
Attendees

Create Encounter Perform Action

Actions	Individual Note	Misc. Notes	Encounter	Client Name	# Attnd	Status
		Create	<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.



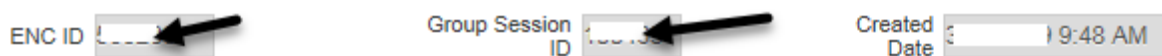
### C) Updating Individualized Encounters

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.

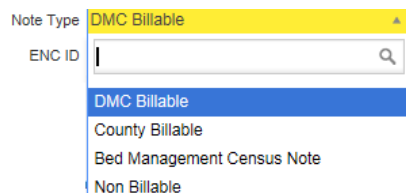
Attendees					
Actions	Individual Note	Misc. Notes	Encounter	<input type="checkbox"/>	Client Name
		<a href="#">Create</a>	<a href="#">View</a>	<input type="checkbox"/>	
		<a href="#">Create</a>	<a href="#">View</a>	<input type="checkbox"/>	

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:** If DMC, select **Yes**. If County billable, select **No**.

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.

**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.

Group Session Travel Duration	<input type="text" value="15"/>	Min	▼	i	Documentation Duration	<input type="text" value="0"/>	Min	▼	i
Session Duration	<input type="text" value="90"/>	Min	▼	i	Total Duration	<input type="text" value="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
<input type="text" value="Motivational Interviewing"/> <input type="text" value="Relapse Prevention"/> <input type="text" value="Other"/>	<input type="text" value="None"/>

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

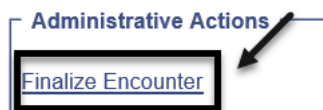
**Visit Type:** Select GP-Group for clinical group.

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, click **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

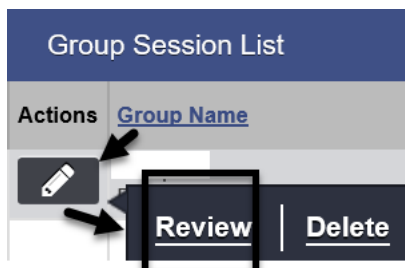
Type  Lead Staff

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



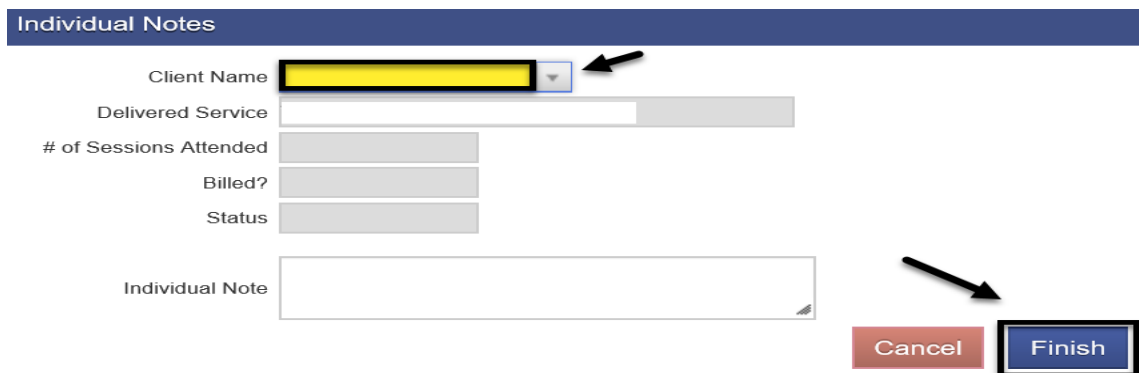
At the Group Session List, hover over the pen in Actions, and click **Review**.



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

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
		<a href="#">Create</a>	<a href="#">View</a>	<input type="checkbox"/>	
		<a href="#">Create</a>	<a href="#">View</a>	<input type="checkbox"/>	
		<a href="#">Create</a>	<a href="#">View</a>	<input type="checkbox"/>	
		<a href="#">Create</a>	<a href="#">View</a>	<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.



## 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="#">WIT 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





## **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
ODS	Organized Delivery System
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**

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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.

