



## Notes Guide

The procedures to document treatment encounters, services provided by treatment, progress notes and miscellaneous notes.

### Table of Contents

Types of Notes in UWITS .....	2
Domain and Encounter Notes .....	2
Searching for Notes .....	3
Encounter Notes.....	4
Encounters for Substance Use Disorder .....	5
Adding Notes (SUD) .....	6
Release to Billing .....	6
Release to Billing (SUD) .....	7
Encounters for Mental Health (MH).....	8
Adding Notes (MH) .....	9
Allow Disclosure .....	9
Release to Billing .....	9
Miscellaneous Notes .....	10
Note Type .....	10
Alerts .....	10
Notes .....	11
Allow Disclosure .....	11
Tools for All Notes .....	12
Generate Report (a single note) .....	12
Print Notes (All Notes).....	13
Report: Combined Note Data .....	14

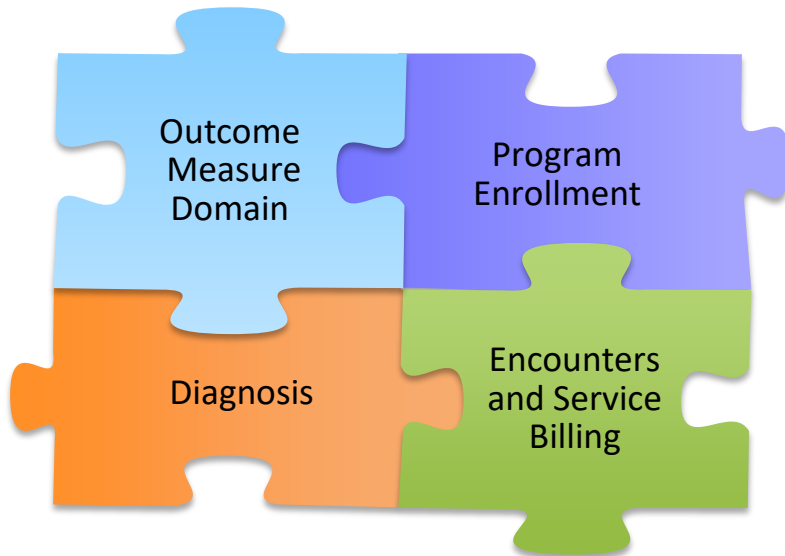
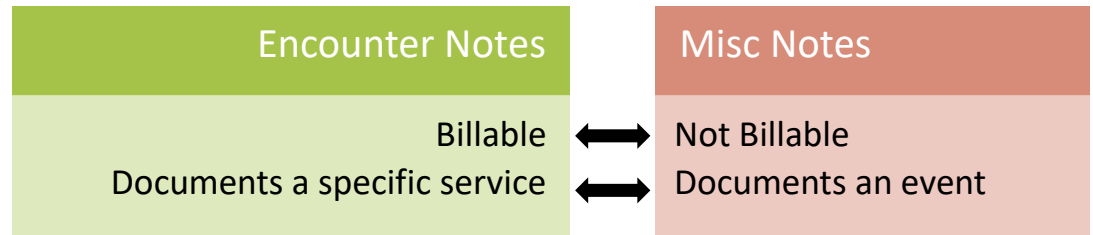
# Types of Notes in UWITS

Notes are used to document treatment encounters, services provided by treatment, progress notes and miscellaneous.

There are two primary types of notes in UWITS:

- Encounter Notes
- Miscellaneous Notes (Misc Notes)

Both Substance Use Disorder (SUD) services, Mental Health (MH) services and Recovery Support Services (RSS) are billed via Encounter Notes. RSS billing will not be discussed in this document.

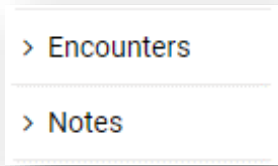


## Domain and Encounter Notes

Encounter notes are unique for each Domain. SUD Encounter Notes include an ASAM style treatment plan. MH Encounter Notes associate to the existing treatment plan information. Just as the Client Program Enrollment (CPE) domain must match the Outcome Measure (OM) domain, the domain of the Encounter Note also must match the CPE domain.

# Searching for Notes

Search for Encounter Notes by clicking on **Encounters** in the Navigation pane to the left.



Search for both Encounter Notes and Misc Notes by clicking on **Notes** in the Navigation pane to the left.

**Tip!** The Export link at the Encounter Search screen will allow you to save the list of Encounter Notes to your device.

## Encounter Search

Start Date: 5/9/2021      End Date: 5/9/2022

Service:

Program:

Rendering Staff:       Encounter Status:

Allow Disclosure of Note  
 Yes    No

### Encounter List

+ Add Substance Abuse Encounter   [Export](#)

Currently, there are no results to display for the Encounter List.

## Notes Search

Start Date: 5/9/2021      End Date: 5/9/2022

Allow Disclosure of Note  
 Yes    No

### Note List

+ Add New Misc. Note   + Add New Encounter Note   + Print Notes

Currently, there are no results to display for the Note List.

# Encounter Notes

Encounter Notes document delivered client services.

To access Encounters, click on **Encounters** in the blue Navigation pane to the left. Once a client has been enrolled in a program, a link corresponding to the program's Domain (such as Mental Health) will be available. To add an Encounter, click on the appropriate link.

The image shows two screenshots of a web application interface. At the top center, a button labeled '> Encounters' is highlighted with a dashed blue line. Below it, two buttons are shown: '+ Add Mental Health Encounter' on the left and '+ Add Substance Abuse Encounter' on the right, both also highlighted with dashed blue lines. The left screenshot shows the 'Encounter' form with fields for Note Type (Progress Notes), Billable (Yes/No), Program Name (Administrative Unit/MH-Outpatient prog : 8/1/2021 -), Parent Service, Service, Start Date, End Date, Start Time, End Time, Duration, # of Sessions, Service Location, and Emergency (Yes/No). The right screenshot shows the 'Treatment Plan/Encounter Notes' form with fields for Billable (Yes/No), Program (7-Administrative Unit/TEDS 01\_1.0\_Youth : 4/21/2021 -), Service, Start Date, End Date, Start Time, End Time, Duration (Min), Rendering Staff (Masters, Robyn), Dimension (1 - Acute Intoxication and/or Withdrawal Potential, 2 - Biomedical Conditions and Complications), Severity Rating, and Priority, Goal, & Method Statement. A 'Review' button is visible next to the Priority, Goal, & Method Statement field.

Encounter Notes cannot be released to billing until the associated OM for the associated CPE is complete.



## Encounter Narrative: 5/9/2022 -

Unsigned Notes

Release This Note?  
 Yes  No **Sign Note**

Signed Notes

Signed by Masters, Robyn 5/9/2022 1:26:27 PM:  
Shared contact information with Mrs. Trench for a local nonprofit that may help her obtain the necessary furniture she needs. Recommended a four week stay in residential treatment. made the necessary referrals and shared the necessary contact information.

◀ Back Next ▶ **Save** **Save and Finish** × Cancel

Administrative Actions

Bill Service

## Adding Notes (SUD)

Notes can either be signed or unsigned; however, an Encounter cannot be released to billing until notes are signed and saved.

Type notes into the **Unsigned Notes** box at the top of the screen. Clicking on the **Sign Note** button will:

- Append the notes to the **Signed Notes** box, below.
- Digitally sign the note with your name, credentials (if entered in your staff profile) and date.
- Lock the note content; signed notes cannot be edited but additional notes can be added and appended.

Click **Save**.

---

**Tip!** If Encounter Notes are consented then answering the question **Release This Note?** with a No will only include session details. Answering Yes will include both session details and signed notes. The default value is No.

---

## Release to Billing

Only if the **Billable** field is Yes can an Encounter be released to billing. To start the process to Release to Billing at this time, click on the **Bill Service** link.

Otherwise, click **Finish**.

Once Encounter Notes have met the requirements, they can be billed, either immediately or at another time or by another user.

## Before Encounters can billed

1. All required fields must be completed.
2. Encounter Note narratives must include a signed note.
3. The date of service should be between the start and end dates for the Client Program Enrollment (CPE) selected.
4. Encounter Notes cannot be released to billing until the associated OM is complete.
5. UWITS users must be assigned a Billing Role (permission) to Release to Billing.

## Release to Billing (SUD)

Once Encounter Notes have met the requirements, they can be billed.

**Diagnosis** will auto-fill based on the most relevant Diagnosis as of the date of the service entered.

**Add-On** codes should be entered according to the service provided. Any additional time added with an Add-On code should be factored into the **Duration** of the session.

To proceed with billing, click on the **Release to Billing** link.

The **Client Group Enrollment (CGE)** dropdown reflects the Client Group Enrollments effective under the Client Profile on the Encounter's date of service.

Select the correct CGE and then click on **Save and Finish**. If only one applies it will be auto-populated.

The screenshot shows the 'Encounter Profile' form with the following fields and sections:

- Program:** Administrative Unit/99\_1.0\_GenAdult : 5/9/2022 -
- Service:** Alcohol/Drug Assessment
- Start Date:** 5/9/2022
- End Date:** (empty)
- Start Time:** 1:35 PM
- End Time:** 2:45 PM
- Duration:** 70 Min
- # of Sessions:** 1
- Service Location:** Office
- Rendering Staff:** Masters, Robyn
- Diagnoses for this Service:**
  - Primary: F10.20-Alcohol dependence, uncomplicated(ICD)
  - Secondary: Select an option
  - Tertiary: Select an option
- Add-On Services List:** + Add New Add-On. Currently, there are no results to display for the Add-On Services List.
- Administrative Actions:** Release to Billing

Buttons at the bottom: < Back, Next >, Save, Save and Finish, × Cancel.


The **Release To Billing** modal is open, showing a **Client Group Enrollment** dropdown menu and buttons for **Save and Finish** and **× Cancel**.

## Encounters for Mental Health (MH)

To complete an Encounter Note for a Mental Health service, complete all yellow highlighted fields.

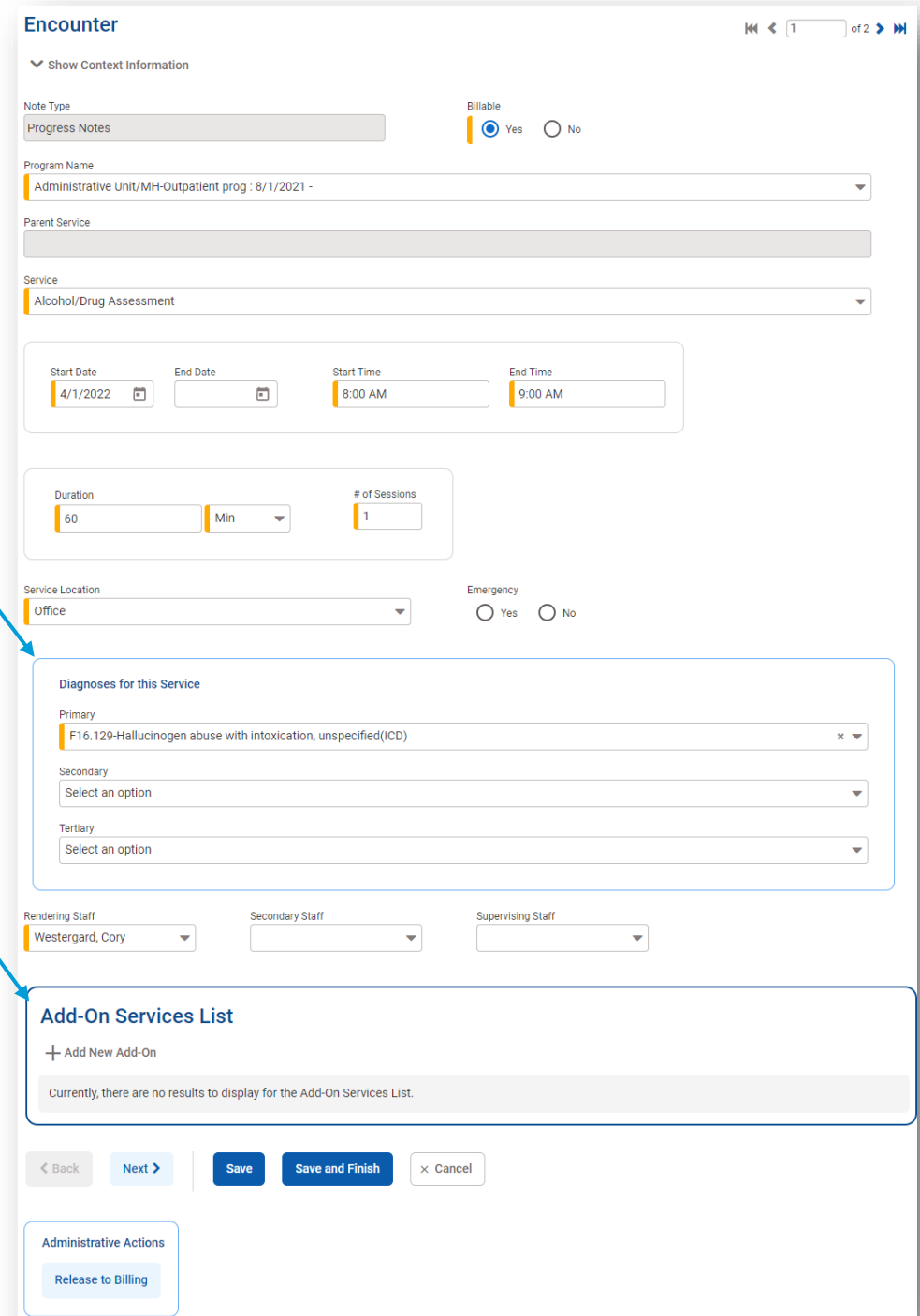
**Diagnosis** will populate based on the most recent Diagnosis entered as of the date of service.

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

 Click Next to advance to the next screen.

### Before Encounters can billed

1. All required fields must be completed.
2. Encounter Note narratives must include a signed note.
3. The date of service should be between the start and end dates for the Client Program Enrollment (CPE) selected.
4. Encounter Notes cannot be released to billing until the associated OM is complete.
5. UWITS users must be assigned a Billing Role (permission) to Release to Billing.



**Encounter** 1 of 2

Show Context Information

Note Type: Progress Notes Billable:  Yes  No

Program Name: Administrative Unit/MH-Outpatient prog : 8/1/2021 -

Parent Service:

Service: Alcohol/Drug Assessment

Start Date: 4/1/2022 End Date: Start Time: 8:00 AM End Time: 9:00 AM

Duration: 60 Min # of Sessions: 1

Service Location: Office Emergency:  Yes  No

**Diagnoses for this Service**

Primary: F16.129-Hallucinogen abuse with intoxication, unspecified(ICD)

Secondary: Select an option

Tertiary: Select an option

Rendering Staff: Westergard, Cory Secondary Staff: Supervising Staff:

**Add-On Services List**

+ Add New Add-On

Currently, there are no results to display for the Add-On Services List.

< Back Next > Save Save and Finish Cancel

Administrative Actions

Release to Billing

**Encounter Notes**

Goal Progress

**Add Goals**

+ Add Goals

Goal #	Goal	Description
	G: Goal for show	

**Add Objectives**

+ Add Objectives

Obj #	Objective	Description
	M: New Objective	

**Add Interventions**

+ Add Interventions

#	Intervention	Status
	AAAAA	In Progress

Unsigned Notes

Allow Disclosure  
 Yes  No **Add Note** **Sign Note**

Signed Notes

Signed by Westergard, Cory 4/12/2022 11:59:04 AM:  
Added the TXPlan information for this MH note.

< Back
Next >
**Save**
**Save and Finish**
x Cancel

Administrative Actions

[Release to Billing](#)

## Adding Notes (MH)

Click on links to **Add Goals**, **Add Objectives**, and **Add Interventions** from a relevant Treatment Plan to include them on the service note.

Type notes into the **Unsigned Notes** box in the middle of the screen. Clicking on the **Sign Note** button will:

- Append the notes to the **Signed Notes** box, below.
- Digitally sign the note with your name, credentials and date.
- Lock the note content; signed notes cannot be edited.

## Allow Disclosure

Select Yes in the **Allow Disclosure** field to allow signed notes to be included if and when notes are consented. The default value is No.

Click **Save or Finish**.

Once Encounter Notes have met the requirements, they can be billed, either immediately or at another time or by another user.

**Tip!** If Encounter Notes are consented then selecting a No at **Allow Disclosure** will only include session details. Selecting Yes will include both session details and signed notes.

## Release to Billing

Only if the **Billable** field is Yes can this Encounter be released to billing. To start the process to Release to Billing at this time, click on the **Release to Billing** link. Otherwise, click **Save and Finish**.

The **Client Group Enrollment** dropdown reflects Client Profile>Payor Group Enrollments effective on the encounter date of service. Select the correct **Client Group Enrollment** and then click on **Save and Finish**.

**Release To Billing**

Client Group Enrollment

**Save and Finish**
x Cancel

# Miscellaneous Notes

**Miscellaneous Notes**

▼ Show Context Information

Note Type: Miscellaneous Service Date: 5/9/2022 Duration: [ ] [ ]

Program: Administrative Unit/99\_1.0\_GenAdult : 5/9/2022 - Start Time: [ ] End Time: [ ]

Alert:  Yes  No [Mark Alert](#) Frequency: Incidental Was Report Sent to State:  Yes  No

Summary: Improvement in quality of housing

Unsigned Notes: Mrs. Trench reports that she has successfully obtained the needed furniture from the nonprofit recommended at our last meeting. She and her husband Patrick, now have adequate furniture.

Allow Disclosure:  Yes  No [Add Note](#) [Sign Note](#)

Signed Notes: [ ]

[Save](#) [Save and Finish](#) [Cancel](#)

Fields with a solid or striped yellow bar to the left are required.



To access Notes in a client episode, click on **Notes** in the blue Navigation pane to the left. To add a note, click on the **Add New Misc. Note** link.

## Note Type

There are several **Note Types** available:

- Case Management Note
- Collateral Information
- Contact Note
- Court Comments
- Crisis note
- Medication Administration
- MID
- Miscellaneous
- Note to file
- Violation

## Alerts

Click on the **Mark Alert** link to indicate if the client indicates follow-up or review. The Client's name will then appear in red on the Client List when the alert is active.

When you see a client listed in red, you can check the **Misc Notes** to see the reason behind the alert.

When an alert is activated, the link is changed to **Remove Alert**. Once the alert is no longer needed, click on this **Remove Alert** link to turn off the alert.

Alert:  Yes  No [Mark Alert](#)

Alert:  Yes  No [Remove Alert](#)

**Client List**

+ Add Client Export

Full Name	Unique Client #	SSN	
<span style="background-color: #f08080; border-radius: 50%; padding: 2px;">PT</span> TRENCH, Patrick 9/9/1999 Male	P9T090999M	999-99-9999	⋮
<span style="background-color: #f08080; border-radius: 50%; padding: 2px;">PT</span> TRENCH, Pippa 9/9/1999 Female	P9T090999F	999-99-9999	⋮

## Notes

Type notes into the **Unsigned Notes** box at the bottom of the screen. To sign the note, click on the **Sign Note** button. This button will:

- Append the notes to the **Signed Notes** box, above.
- Digitally sign the note with your name, credentials and date.
- Lock the note content; signed notes cannot be edited.

Click **Save**.

## Allow Disclosure

Select Yes in the **Allow Disclosure** field to allow signed notes to be included if notes are consented. The default value is No.

Click **Save and Finish**.

**Please Note:** After saving this note, several fields will no longer be editable. However, you may still mark or remove an **Alert** and modify the **Allow Disclosure** field at any time. In addition, **Unsigned Notes** may continue to be edited until signed and you may append additional notes.

**Miscellaneous Notes**

▼ Show Context information

Note Type: Miscellaneous | Service Date: 5/9/2022 | Duration: [ ] [ ]

Program: Administrative Unit/99\_1.0\_GenAdult : 5/9/2022 -

Alert:  Yes  No [Mark Alert](#) | Frequency: Incidental

Was Report Sent to State:  Yes  No

Start Time: [ ] | End Time: [ ]

Summary: Improvement in quality of housing

Unsigned Notes: Mrs. Trench reports that she has successfully obtained the needed furniture from the nonprofit recommended at our last meeting. She and her husband Patrick, now have adequate furniture.

Allow Disclosure:  Yes  No **Add Note** **Sign Note**

Signed Notes: [ ]

**Save** **Save and Finish** × Cancel

# Tools for All Notes

## Generate Report (a single note)

Along the white bar at the top of the screen, there is a button labeled **Generate Report** which will produce a printable report of the Note on the screen.

The screenshot shows the top navigation bar of the UWITS system. On the left, there is a logo for UWITS 22.2.0. In the center, there is a patient header for Pippa Trench (PT) with her Unique Client ID (P9T090999F) and a '22' icon. On the right, there is a user profile for Robyn Masters (RM) from the Administrative Agency. A 'Generate Report' button is located in the top right area of the navigation bar. Below the navigation bar, patient details are displayed: 9/9/1999 DOB and Female SEX.

The screenshot shows the 'Treatment Plan/Encounter Notes' form. It includes a 'Show Context Information' dropdown, a 'Billable' field set to 'Yes', a 'Program' field with the value 'Administrative Unit/99\_1.0\_GenAdult : 5/9/2022 -', and a 'Service' field with the value 'Alcohol/Drug Assessment'. There are input fields for 'Start Date' (5/9/2022), 'End Date', 'Start Time' (1:35 PM), and 'End Time' (2:45 PM). A 'Duration' field is set to '70' minutes. The 'Rendering Staff' field is filled with 'Masters, Robyn'. The form also has sections for 'Dimension' (1 - Acute Intoxication and/or Withdrawal Potential) with a 'Severity Rating' of 'Medium' as of '5/9/2022', and '2 - Biomedical Conditions and'. At the bottom, there are signature and date lines for 'Trench, Pippa'.

**Tip!** To see this report, make sure that you have enabled pop-ups from UWITS.

The screenshot shows a 'Miscellaneous Notes' report. It includes the following information:

- Printed:** 05/09/2022
- Client Name:** Trench, Pippa
- MPI:**
- Date of Birth:** 09/09/1999

The report is for 'Administrative Agency' and includes a table of service details:

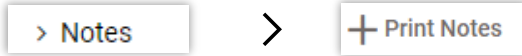
Service Date:	Note/Service Type:	Author:
05/09/2022	Miscellaneous	Masters, Robyn

Additional fields include:

- Start Time:**
- End Time:**
- Duration:**
- Program:** 99\_1.0\_GenAdult
- Summary:** Improvement in quality of housing
- Signed Note:** Signed by Masters, Robyn, 5/9/2022 2:45:04 PM: Mrs. Trench reports that she has successfully obtained the needed furniture from the nonprofit recommended at our last meeting. She and her husband, Patrick, now have adequate furniture.
- Unsigned Note:**

## Print Notes (All Notes)

Use the **Print Notes** link to generate a report of all Notes for this client—including both Encounter Notes and Misc Notes.



At the Notes screen, click on **Print Notes** at the top, left.

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

Note Date

Enter the range of dates to be printed. Start by entering the **Start Date**, then type a colon (:), then type the **End Date**. Click on the **Go** button to view the report.

Click on the **Export** button to export to an Excel-compatible file.

Click **Finish** to return to the Notes screen.

**Tip!** Use this screen to check for blank or unsigned notes by looking in the **Signed Notes** column. Only signed notes will appear in this column. Any rows with a blank in this column will be either a blank or an unsigned note.

## Client Treatment Notes Report

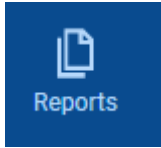
▼ Show Context Information



### Client Treatment Notes Report List

Date	Staff	Client	Type	Program	Start Time	End Time	Summary	Signed Note
4/1/2022	Westergard, Cory	Wayne, Bruce	Progress Notes	MH-Outpatient prog	8:00 AM	9:00 AM	Alcohol/Drug Assessment	Signed by Westergard, Cory 4/12/2022 11:59:04 AM: Added the TXPlan information for this MH note.
2/23/2022	Westergard, Cory	Wayne, Bruce	Progress Notes	99_1.0_GenAdult	8:00 AM	9:00 AM	Alcohol/Drug Assessment	Signed by Westergard, Cory 2/23/2022 9:34:16 AM: note for assessment Signed by Westergard, Cory 2/23/2022 9:37:48 AM: Allows signing ASAM TXPlan without having High or Med Severity Dimensions addressed Signed by Westergard, Cory 2/23/2022 9:38:52 AM: Dimensional Severity Rating is numerical not High, Med, Low. Signed by Westergard, Cory 2/23/2022 9:40:10 AM: Release this Note is greyed out (consentable). This occurred after either Signing the Encounter note the first time or Signing the ASAM TXPlan. Signed by Westergard, Cory 2/23/2022 9:41:01 AM: Services have not been added in the System Admin>Services and there are a limited number of Procedure codes available.

## Report: Combined Note Data



Combined  
Note Data

Select the **Reports** screen then select the **Combined Note Data** report from the list. Select the report filters that will narrow the report to the notes needed.

**Please Note:** Use the **Combined Note Data** report to review notes agencywide. There are better options for review of specific clients.

Click the **On Screen** button to review the notes on the screen and click the **Export** button to export the notes to an Excel file.

The screenshot shows a web interface for the "Combined Note Data" report. At the top left is the title "Combined Note Data". Below it are two filter fields: "Agency" with a dropdown menu showing "Administrative Agency", and "Note Category" with a dropdown menu showing "Encounter Note". Below these is a section titled "Show Only Notes That Need to be Signed" with a dropdown menu set to "Yes". Underneath is a "Note Date Range" section with "From" and "To" labels and two empty date input fields, each with a calendar icon. At the bottom are three buttons: "On Screen" (blue), "Export" (blue), and "Cancel" (white with a grey border).