Notes Guide

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

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Types of Notes in UWITS

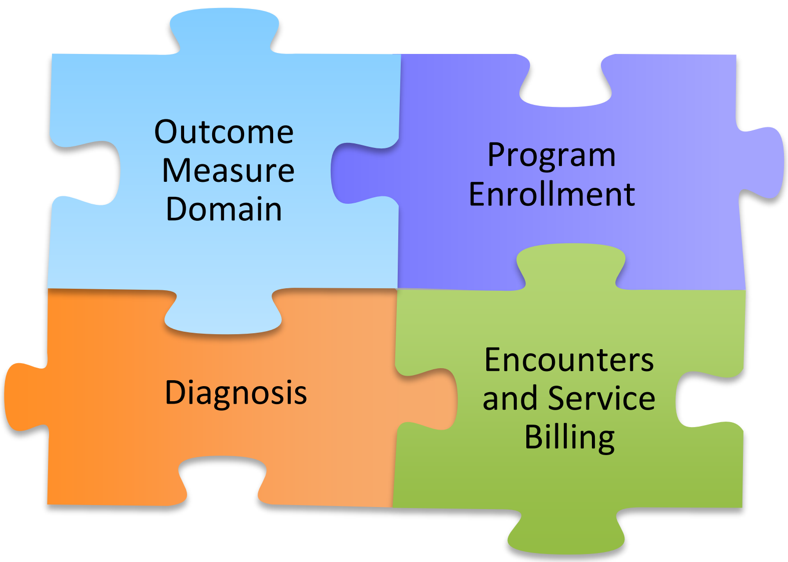
Notes are used to document treatment encounters, services provided by treatment, progress notes and miscellaneous.

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.

Encounter Notes		Misc Notes
Billable	⟷	Not Billable
Documents a specific service	⟷	Documents an event

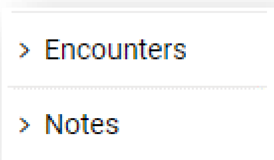


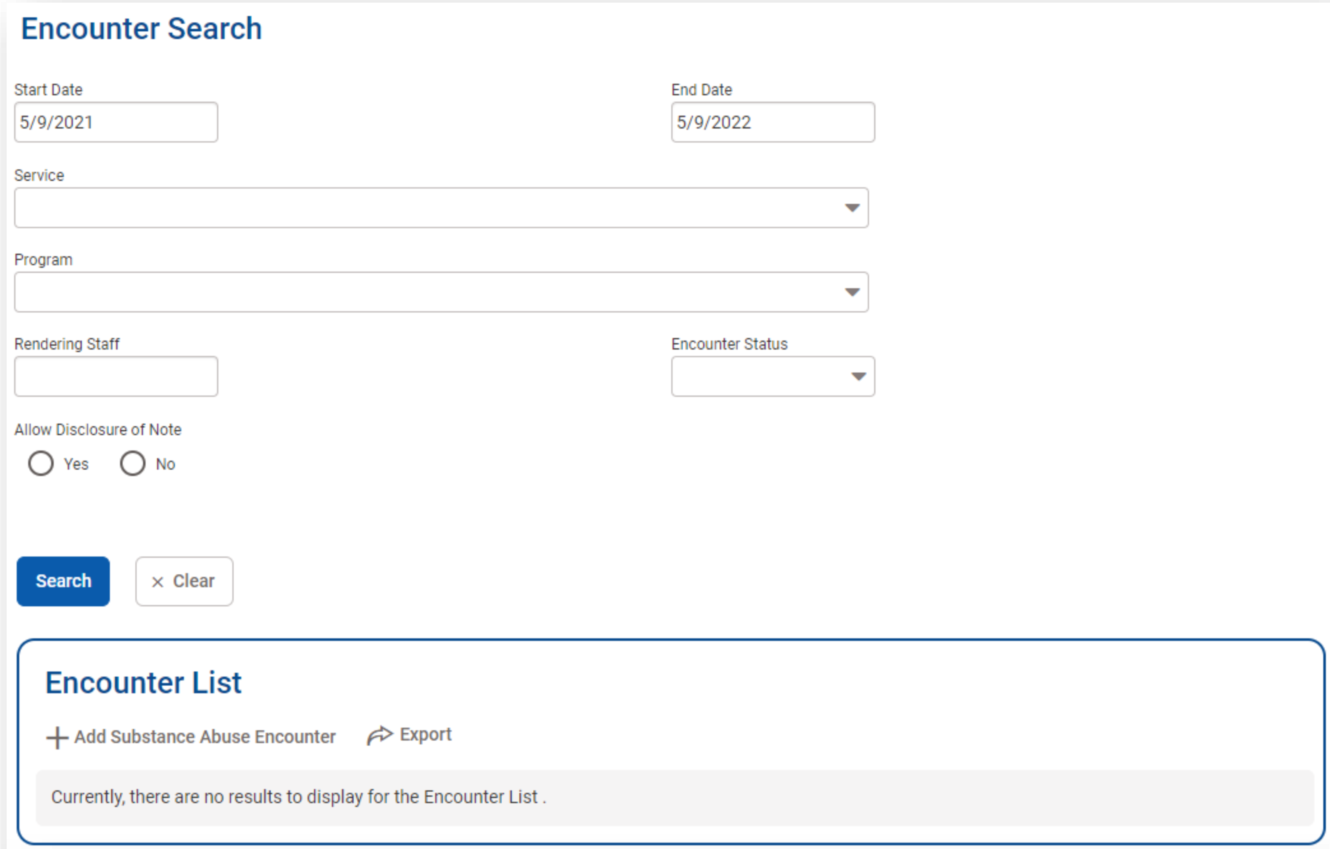
Domain and Encounter Notes

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.

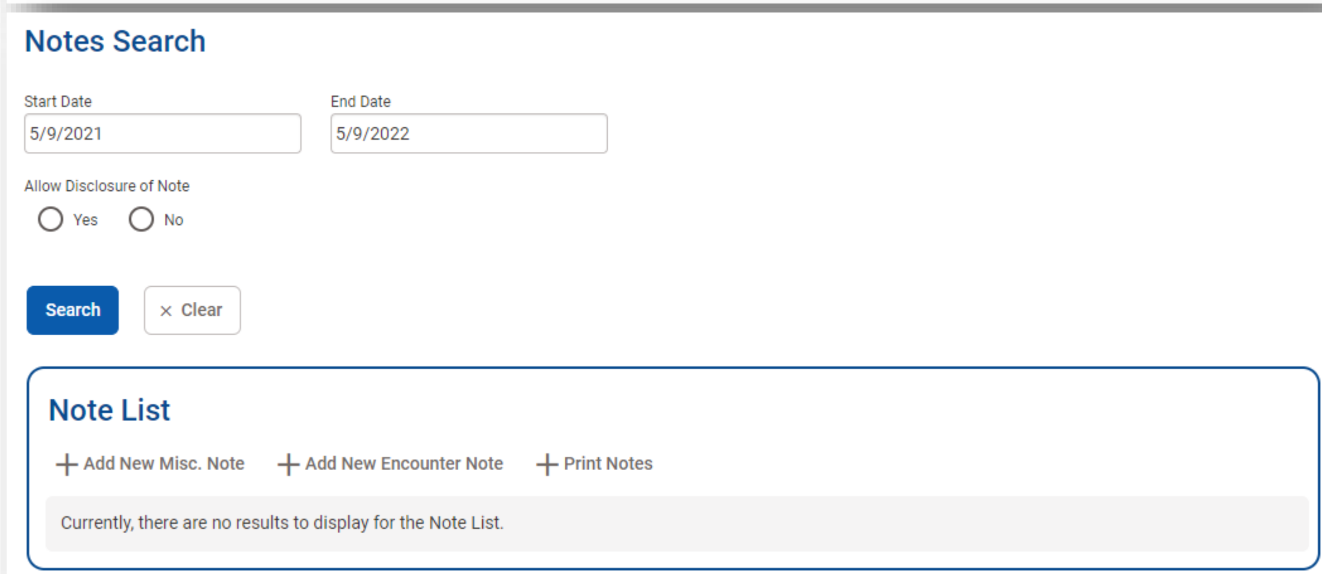
Searching for Notes

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.

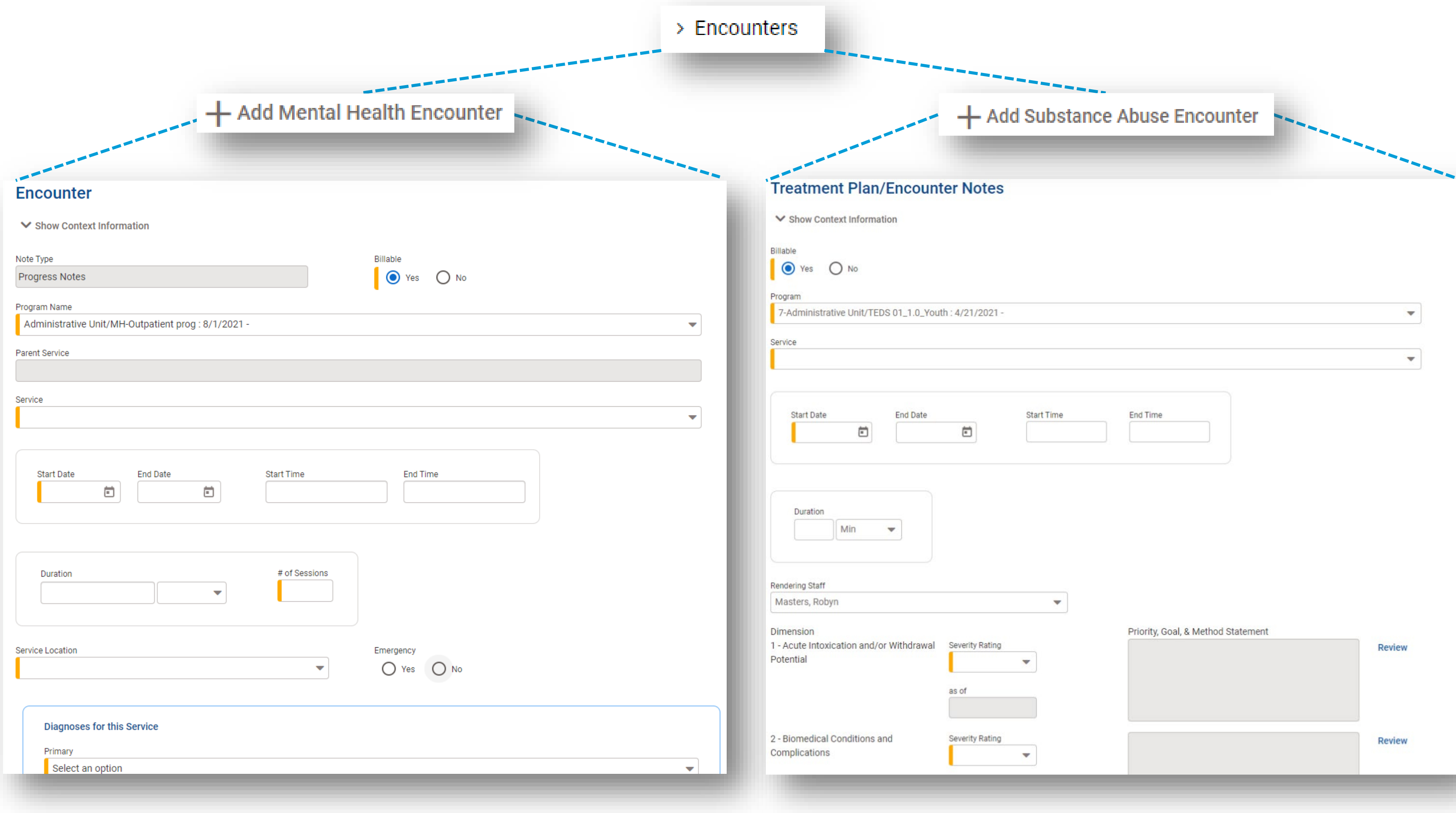


Tip! The Export link at the Encounter Search screen will allow you to save the list of Encounter Notes to your device.

Encounter 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.



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

Encounters for Substance Use Disorder

To complete an Encounter Note for a Substance Use Disorder service, complete all required fields.

At the **Billable** field, select Yes to enable billing of this note OR select No to mark this note as Nonbillable.

Note: Only an open CPE will be shown in the Program field. If only closed CPEs exist, choose the appropriate one from the drop-down menu.

Start and End Times are not always required; if so, the box will have a yellow stripe on the left. When entered the Duration will be automatically calculated in Minutes.

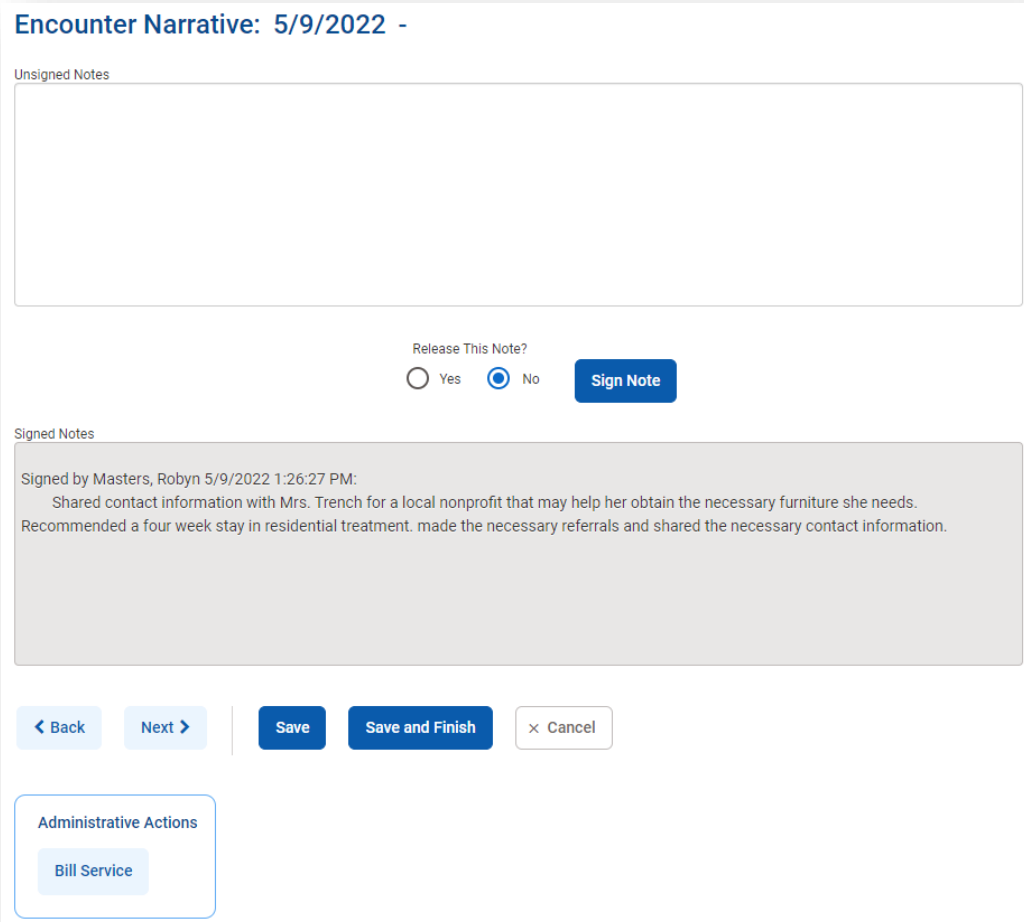
Entering the Service and the Start Date will load the previous ASAM severity ratings and statements from the most relevant signed ASAM Treatment Plan or initial signed OM>ASAM prior to the start date of the delivered service.

Typically, these boxes are filled in during the initial Treatment Plan or during Treatment Plan reviews.

Click on the Review links to add or update a Priority, Goal and Method statement.

Any Dimension with a Severity Rating of Med or High must be addressed by a Priority, Goal & Method Statement before it is possible to sign the ASAM Treatment Plan.

Click Next > to advance to the next screen.



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.

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

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.

Release to Billing (SUD)

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

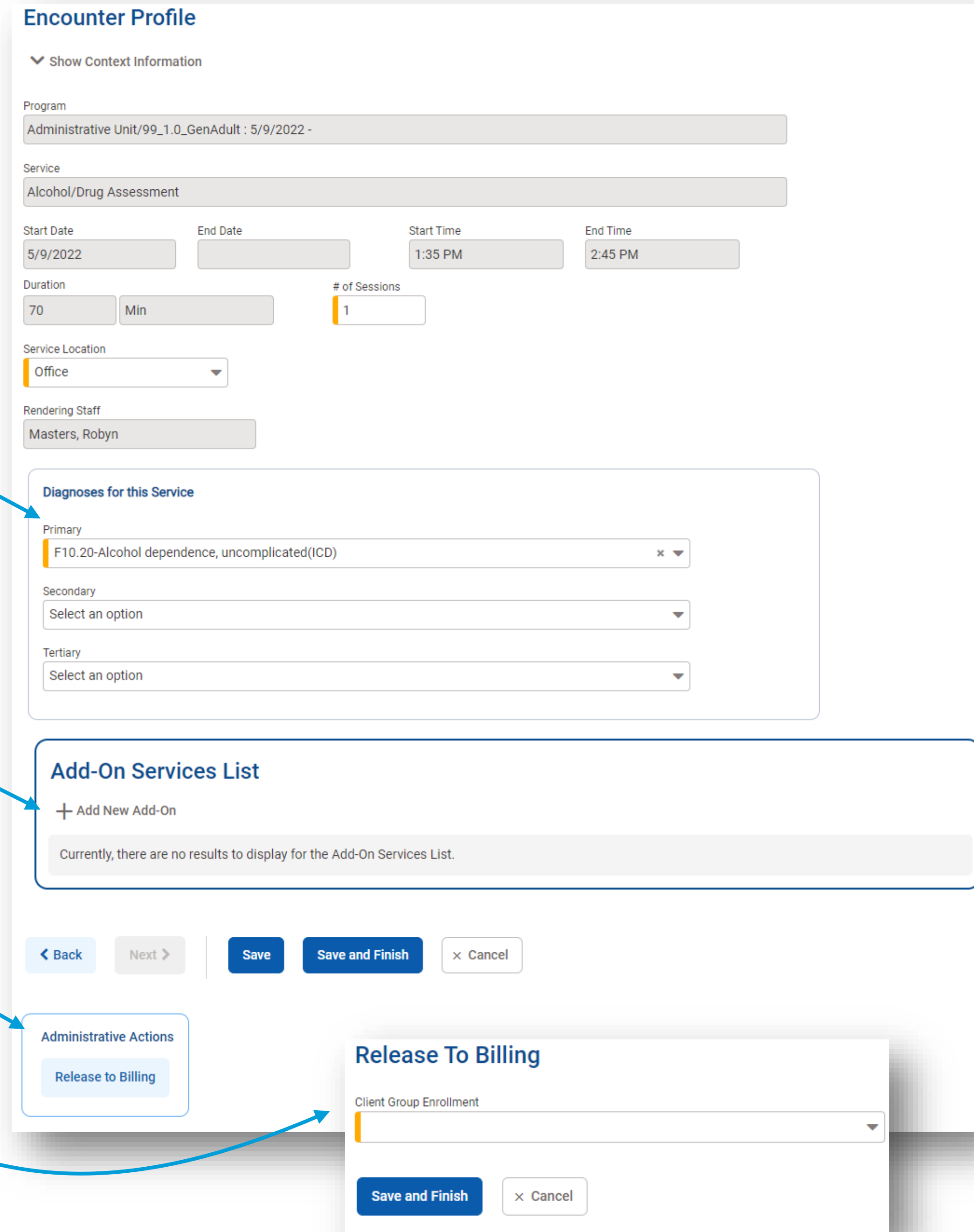
Diagnosis will auto-fill based on the most relevant Diagnosis as of the date of the service entered.

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.



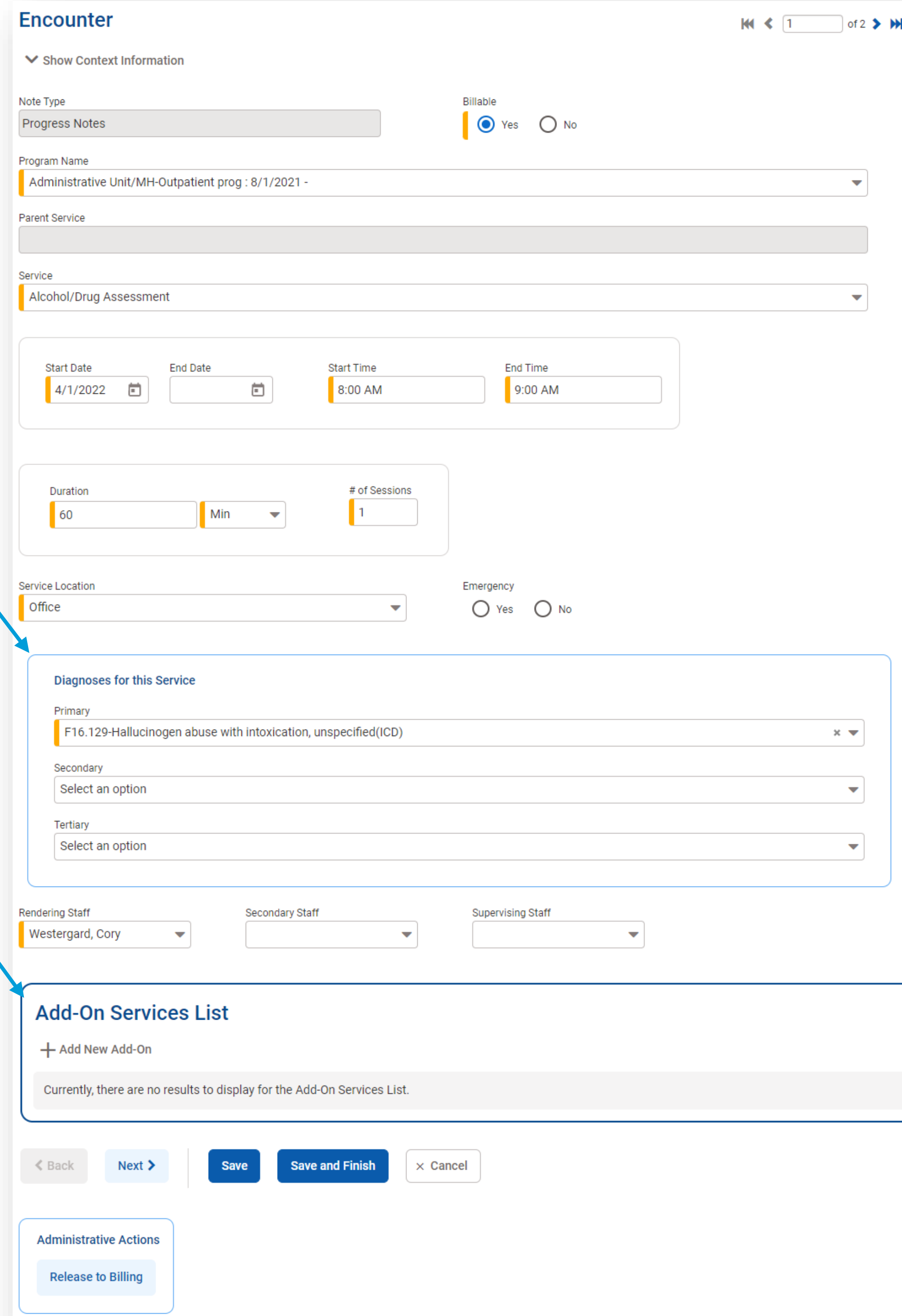
Encounters for Mental Health (MH)

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.

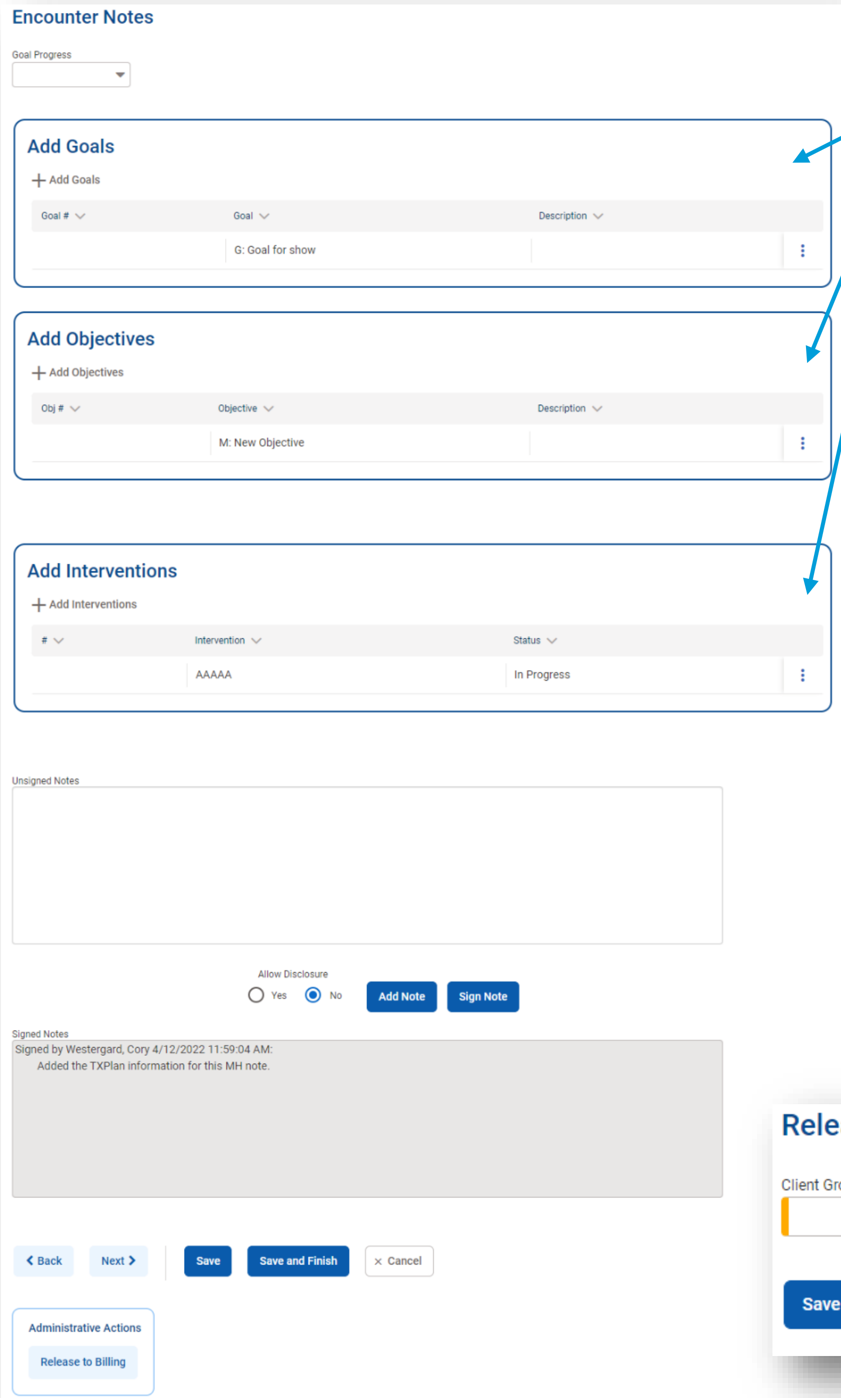
Add-On codes should be entered according to the service provided.

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.



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**.

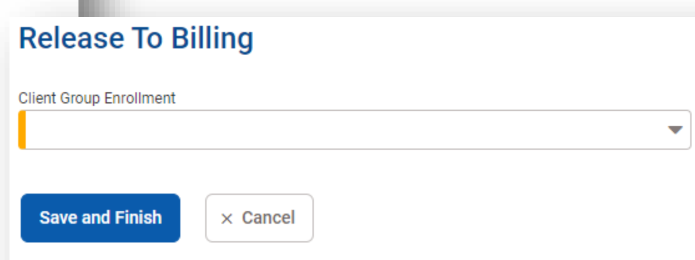
Once Encounter Notes have met the requirements, they can be billed, either immediately or at another time or by another user.

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.

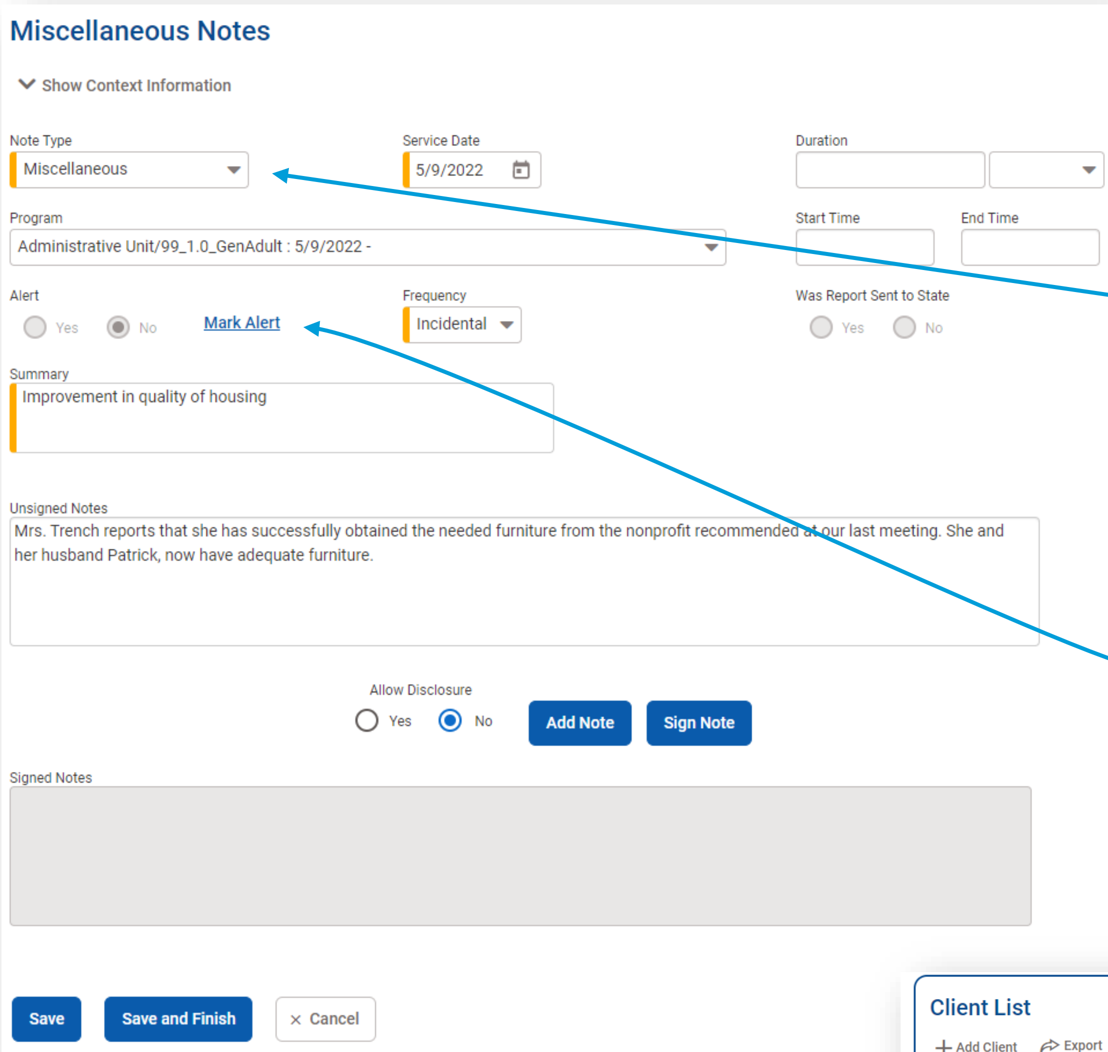
Release to Billing

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**.



Miscellaneous Notes



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:

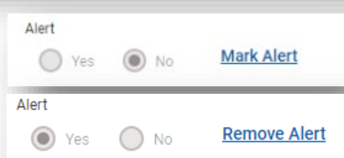
- Case Management Note
- Collateral Information
- Contact Note
- Court Comments
- Crisis note
- Medication Administration
- MID
- Miscellaneous
- Note to file
- Violation

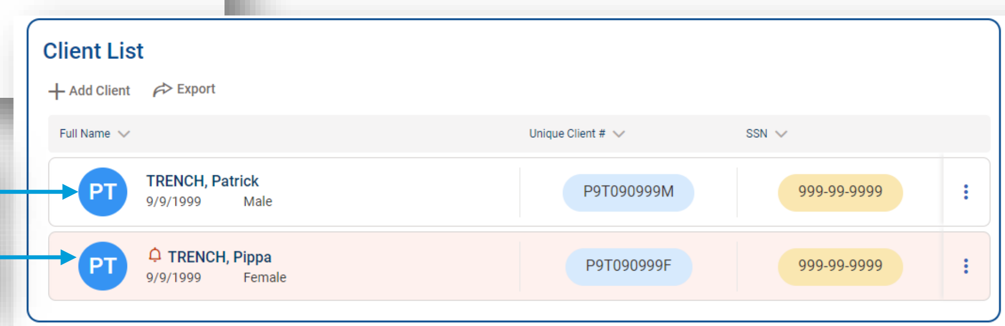
Alerts

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.





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:

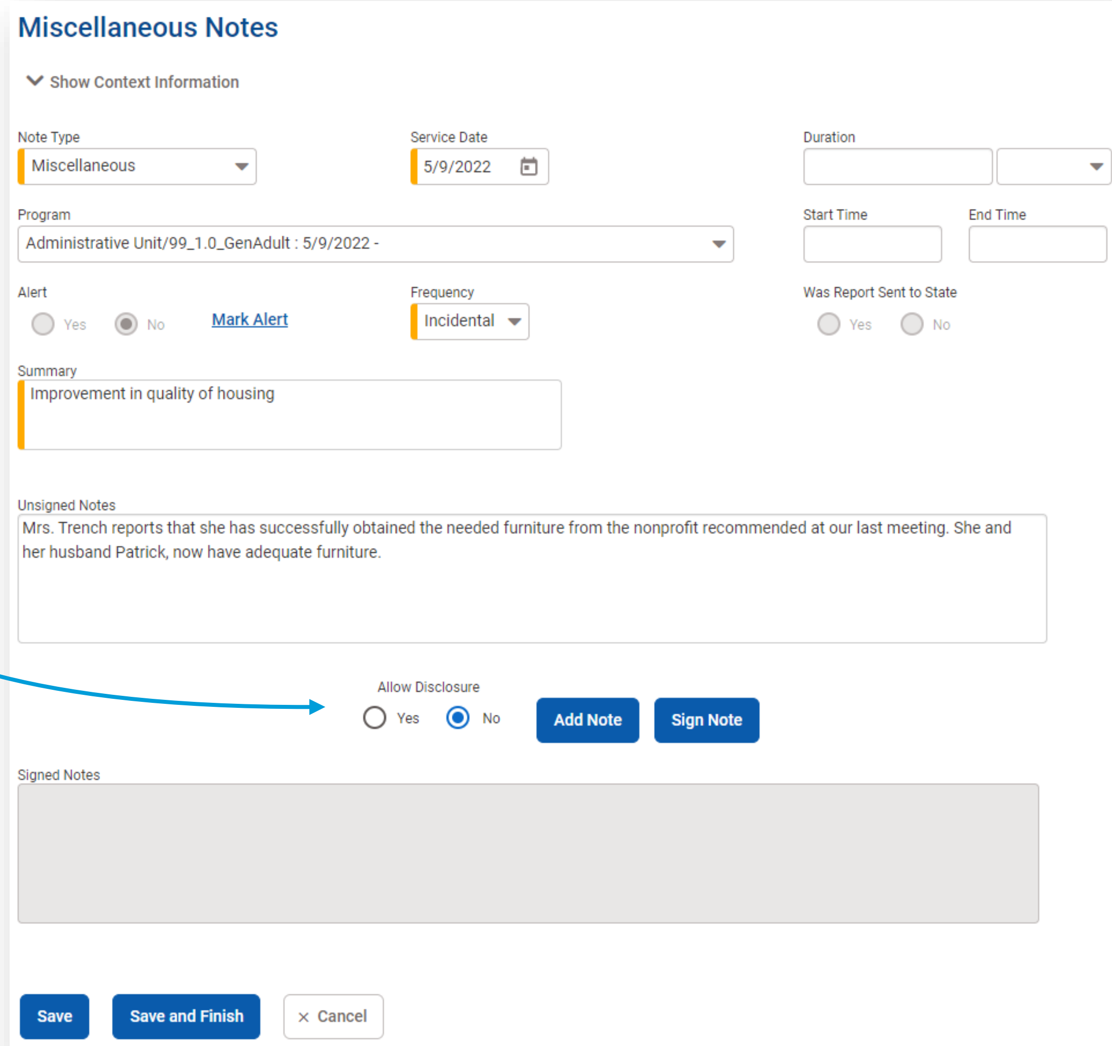
- Append the notes to the **Signed Notes** box, above.
- Digitally sign the note with your name, credentials and date.
- Lock the note content; signed notes cannot be edited.

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**.

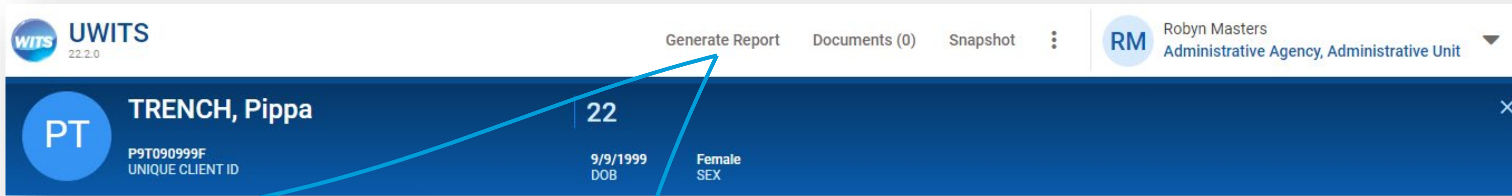


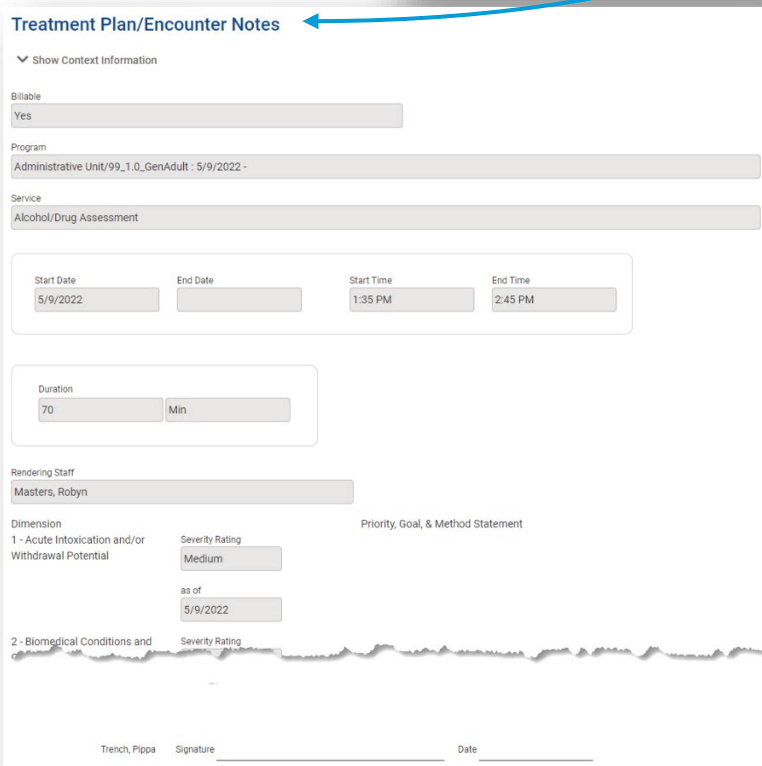
Please Note: After saving this note, several fields will no longer be editable. However, you may still mark or remove an **Alert** and modify the **Allow Disclosure** field at any time. In addition, **Unsigned Notes** may continue to be edited until signed and you may append additional notes.

Tools for All Notes

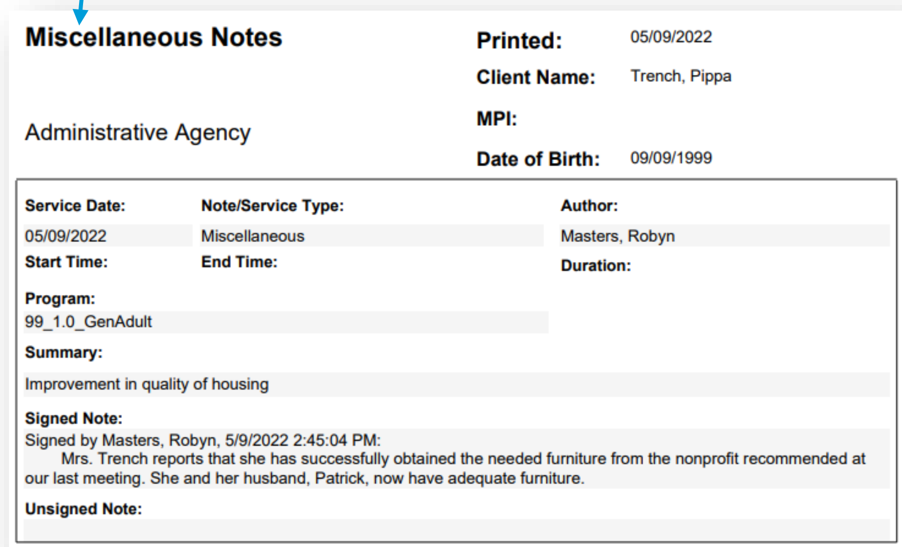
Generate Report (a single note)

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.





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



Miscellaneous Notes

Administrative Agency

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

Service Date:	**Note/Service Type:**	**Author:**
05/09/2022	Miscellaneous	Masters, Robyn
Start Time:	**End Time:**	**Duration:**

Program:
99_1.0_GenAdult

Summary:
Improvement in quality of housing

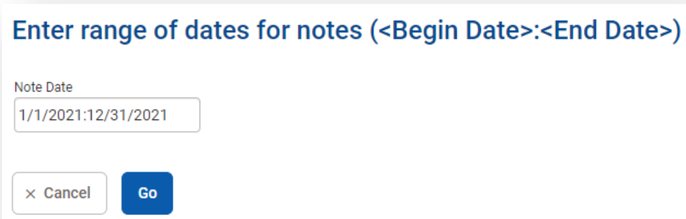
Signed Note:
Signed by Masters, Robyn, 5/9/2022 2:45:04 PM:
Mrs. Trench reports that she has successfully obtained the needed furniture from the nonprofit recommended at our last meeting. She and her husband, Patrick, now have adequate furniture.

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.

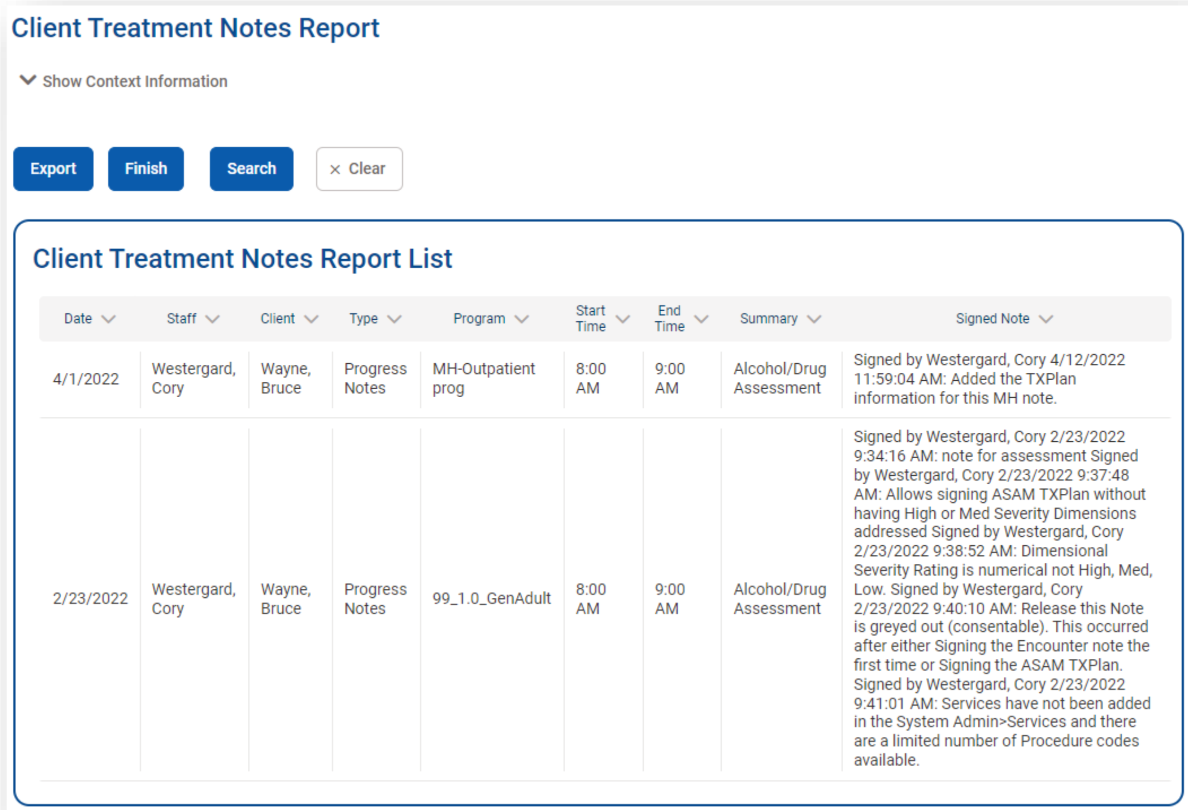
At the Notes screen, click on **Print Notes** at the top, left.



Enter 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.

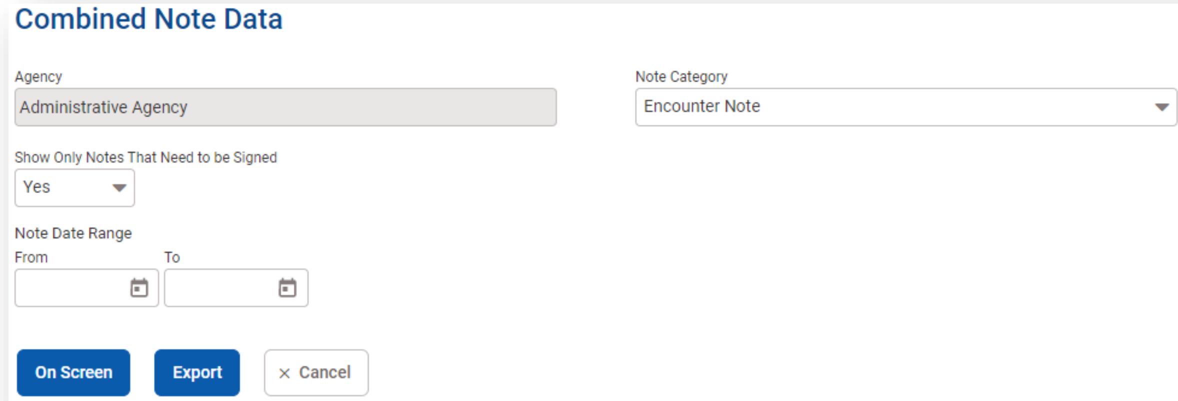


Date	Staff	Client	Type	Program	Start Time	End Time	Summary	Signed Note
4/1/2022	Westergard, Cory	Wayne, Bruce	Progress Notes	MH-Outpatient prog	8:00 AM	9:00 AM	Alcohol/Drug Assessment	Signed by Westergard, Cory 4/12/2022 11:59:04 AM: Added the TXPlan information for this MH note.
2/23/2022	Westergard, 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.

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.

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.