



SUBSTANCE USE DISORDER MIS

OUTPATIENT/OTP ENCOUNTERS AND GROUP MODULES



Live Well San Diego

**County of San Diego
Behavioral Health Services**



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



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.

- Home Page
- ▶ Capacity List
- ▶ Group List
- Clinical Dashboard
- ▶ Client List

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

Client Search

Agency Facility

First Name Last Name

SSN DOB

SanWITS Training Client Id

Unique Client Number Provider Client ID

Treatment Staff Primary Care Staff

Case Status Intake Staff

Other Number Number Type

Include Only Active Consents

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**.

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

Actions	Unique Client #

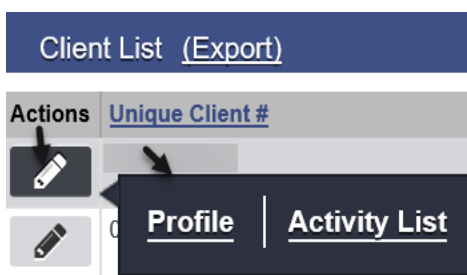
Profile | Activity List



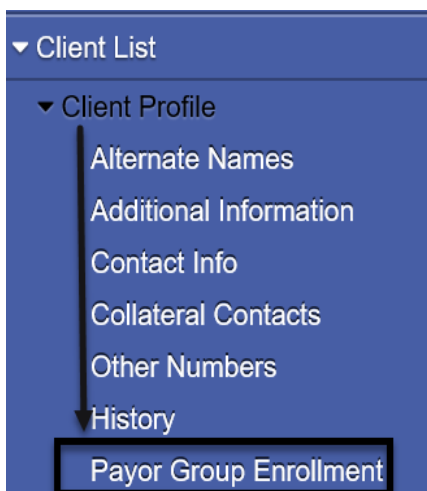
Verify the status of completed activities from the Activity List.

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

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



Click **Payor Group Enrollment**.



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

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

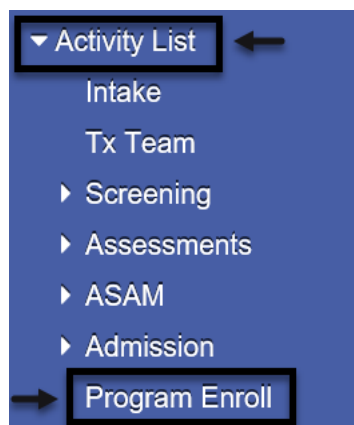


PROGRAM ENROLLMENT

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 current date. To search for enrollments, complete the parameters, and click **GO**.

Program Enrollment

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

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

Program Enrollment List						Add Enrollment
Actions	Program Name	Start Date	End Date	Facility	Notes	



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

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

Program Name: For Outpatient Programs, select ODS-OS or ODS-IOS.
For OTP, select ODS-OTP.

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

Perinatal: If the field is active, select **Yes** or **No**.

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

If the client is male, the field is hidden.

If the facility is not perinatal certified, the field is hidden.

If the facility is perinatal certified and the client is female, the field becomes active and is required to be completed. The perinatal program enrollment dates must be within the facility's perinatal certification period.

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**.

Program Enrollment Profile

Facility	Main Facility	Start Date	<input type="text" value=""/>
Program Name	<input type="text" value=""/>	End Date	<input type="text" value=""/>
Program Staff	Staff, Rendering	PS Court Phase	<input type="text" value=""/>
Perinatal	<input type="text" value=""/>		
Termination Reason	<input type="text" value=""/>		
Notes	<input type="text" value=""/>		

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



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

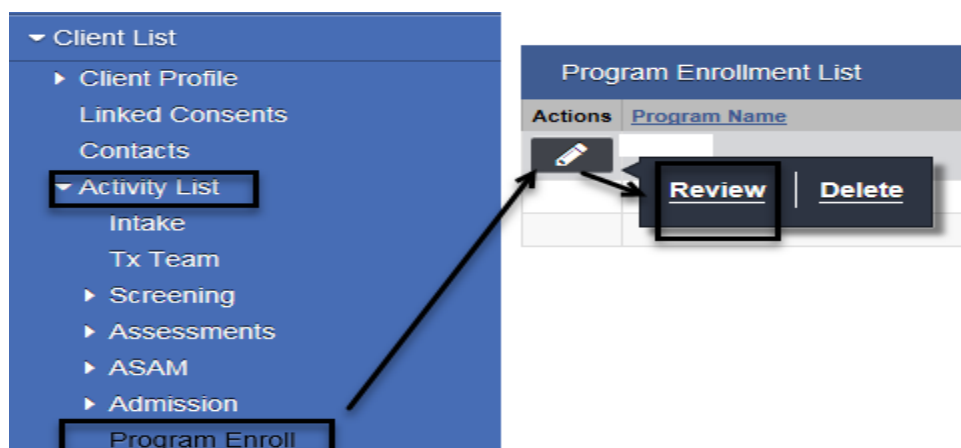


ENDING PROGRAM ENROLLMENT

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

To close a program enrollment from the navigation pane:

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



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

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

The image shows the 'Program Enrollment Profile' form. The 'End Date' field is highlighted with a red box and an arrow pointing to it. The 'Termination Reason' dropdown is also highlighted. The form includes fields for Facility, Program Name, Program Staff, PS Court Phase, Perinatal, Termination Reason, and Notes.

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





Changing Level of Care (LOC)

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

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

Recovery Services

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

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

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

Program Name: Select **Recovery Services**.

Program Enrollment Profile

Facility Main Facility

Program Name Recovery Services

Program Staff Staff, RenderingTest, RADT,LPHA

PS Court Phase

Termination Reason

Notes

Start Date

End Date

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

Cancel Save Finish



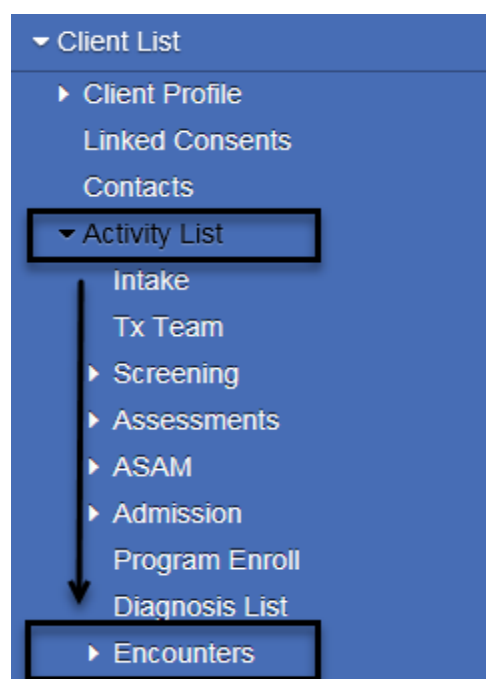
ENCOUNTERS



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

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

Click Activity List → Encounters



The Encounter Search and Encounter List sections are for searching and viewing of previously entered encounters. The system displays recent encounters up to one year.

Encounter Search

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

Rendering Staff:

Encounter Status:

Allow Disclosure of Note:

Service:

Program:

Group Session ID:

Clear Go

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

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



Searching for a Previously Entered Encounter

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

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

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



Adding an Encounter

Enter encounters on a timely manner. Whenever possible, enter these daily. To add an encounter from the navigation pane under the Activity List, click **Encounters**.

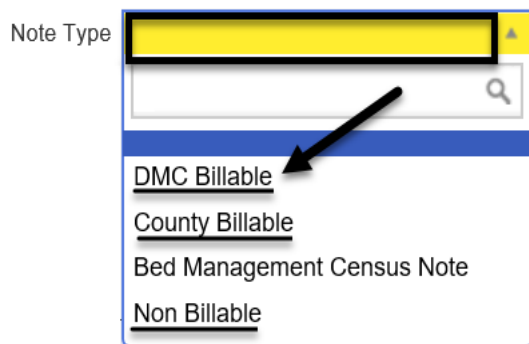


At the Encounters window, click **Add Encounter**.



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 and no show.





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). *For OTP, enter 0. OTP cannot bill for travel.*

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

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

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

Travel Duration Min
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 to provide service to the client. Telehealth and telephonic (phone) are not the same. Telehealth means simultaneous video and audio contact.

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: If the field is active, select **Yes** or **No**,

If the client is male, the Pregnant/Postpartum field is hidden.
If the client is female, the facility is perinatal certified, and yes was selected in the perinatal indicator of the program enrollment, the field defaults to Yes and is read only.
If the client is female and the facility is not perinatal certified, the Pregnant/Postpartum field becomes required.

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. Effective February 1, 2020, a diagnosis with DSM-5 Descriptor should be used.

Diagnoses for this Service

Primary	F10.20-Alcohol use disorder, Moderate(DSM 5)
Secondary	
Tertiary	

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

Rendering Staff

Click **Save**.



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

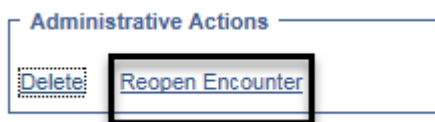
Administrative Actions



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



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



Reopen Encounter reopens a finalized encounter.

Click **Finish**.



NOTES



OTP DOSING ENCOUNTERS



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

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

Below fields are specific to OTP dosing encounters.

OTP dosing can be billed in consecutive days for **Methadone only**. An end date is required to bill for consecutive days and should be end dated by end of the month. The system does not allow an end date to cross over the client's 21st birthday.

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

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

Duration

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

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

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

National Drug Code Drug Quantity

Complete the rest of the encounter section. Click **Save** and **Finish**.



GROUP LIST



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

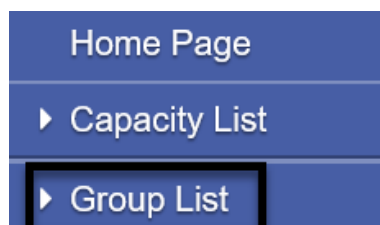
The Group List feature was enhanced specifically for Organized Delivery System (ODS) Group Counseling. The Group List module also allows clinicians to easily track clients who are seen in a group setting.

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.

Searching a Group Profile

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

Click **Group List**.



The Group List expanded with two search options, the All Sessions List within the Group List pane and the Group Profile Search section to the right of Group List.

A. All Sessions List. This path allows a user to search group sessions conducted under a group profile or for a client member. To use this path, click **All Sessions List**.





The prepopulated start date is three months from current date. Enter the client's name or UCN to search all group sessions attended by the client. Enter the group name to search all group sessions conducted under that group. Click **GO**.

Search All Sessions

Start Date: 5/28/2020

End Date: 8/28/2020

Client's Name:

Group Name:

Unique Client Number:

Calculate ODS units?:

Group Session ID:

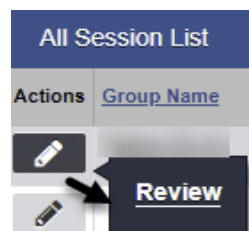
Go

Depending on the search parameters chosen, the All Session List displays all the sessions for the group or the client. The columns are the same, but the results will be different.

All Session List

Actions	Group Name	Session ID	Facility Name	Calculate ODS units?	Rendering Staff	Date	Service Code	Service Description	Start Time	End Time
			Main Facility	Yes		8/19/2020	G9999/04	*ODS Clinical Group-valid beginning 7/1/19	1:00 PM	2:00 PM

To open the group session, on the selected session date hover over the pen in Actions and click **Review**.



The system launches the group session notes for review.

Group Session Notes

Group Name: Session ID:

Group Type: ODS Group

Note Type: **DMC Billable**

Start Date: 8/19/2020

End Date:



B. Group Profile Search. This path allows a user to view all group profiles and also create bulk encounters.

In the Group Profile Search section, enter the client's name or the client's unique client number (UCN). You can also search by group type or lead staff. After completing the search parameters, click **GO**.

Group Profile Search

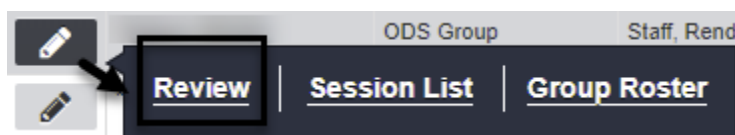
Type Lead Staff Active

Client's Name Unique Client Number

The system displays a list of group profiles in the agency. The group list defaults to the group with the oldest start date displayed at the top. Double click on the Start Date title to sort the group with the most recent start date at the top. You can also click on any of the column headers to sort the groups.

Group Profile List							Add
Actions	Group Name	Group Type	Lead Staff	Day of Week	Time of Day	Start Date	End Date
		ODS Group			8:00 AM	8/26/2020	
		ODS Group		Wednesday	9:00 AM	8/1/2020	
		ODS Group			1:00 PM	7/1/2020	

After you find the existing group profile, hover over the pen in Actions of the selected group profile to view the group profile, session list, or group roster. To view the group profile, click **Review**.

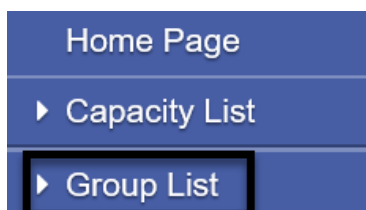




Adding a Group Profile

If the group profile search result does not show that a group profile has been created for the group, create a group profile in SanWITS. To create a new group profile, from the navigation pane:

Click **Group List**.



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



The Group Profile screen launches. 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.

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



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

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

Group Profile

Group Name Start Date End Date

Group Type Day of Week Time of Day

Lead Staff Room Location

Facility

Co-Lead Staff Selected Co-Lead Staff

Description

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, towards the bottom right of the group profile, click **Edit Roster**.

Roster [Show All Clients](#)

To add a member to the group profile roster, on the middle right side of the Roster screen, click **Add Member**.



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

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

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

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**.

NOTES

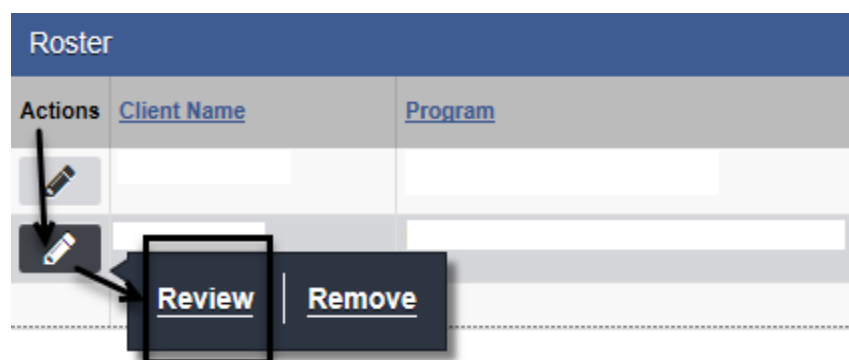


Updating a Client Status

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

[Edit Roster](#)

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



Change the status by clicking on the dropdown menu. Complete the status effective date and reason fields. Click **Save** and **Finish**.

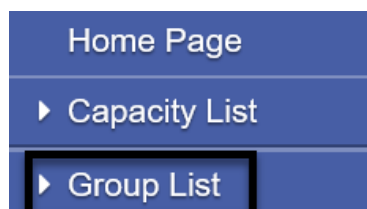
[Add Member](#)

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

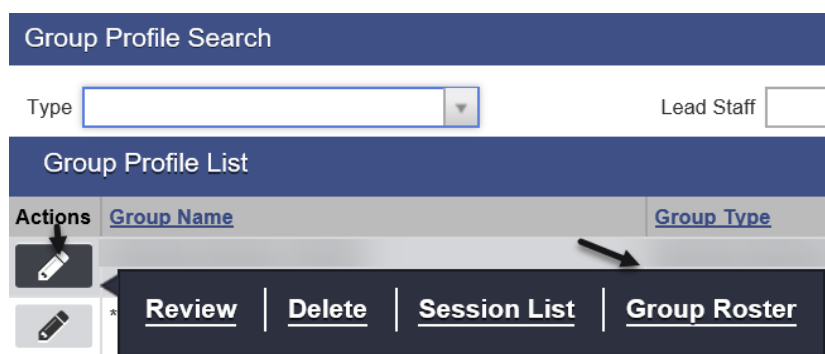


If the group profile window is not open and you want to update the status of a client member from the navigation pane:

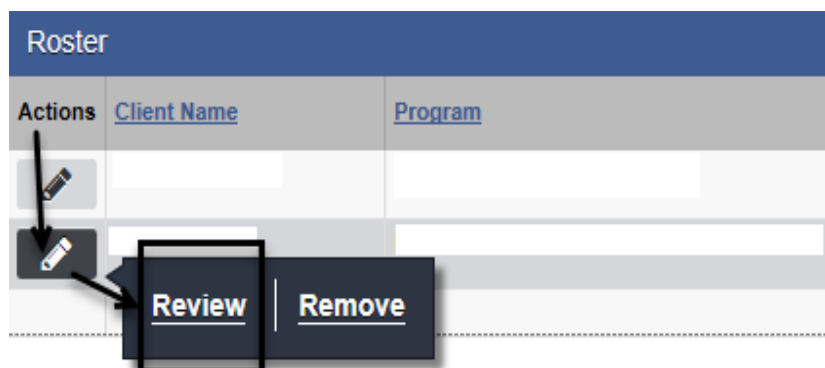
Click **Group List**.



Search for the group profile and select the group profile from the list that displayed in the group profile window. Hover over the pen in Actions and click **Group Roster**.



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



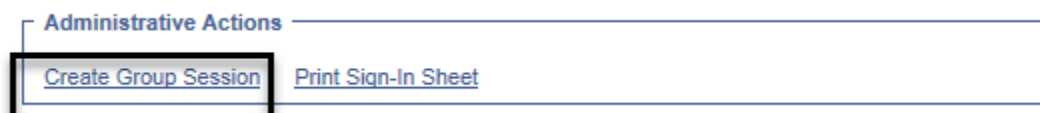


GROUP BULK ENCOUNTERS

A) Creating Group Session Notes (Encounters)

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

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



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

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

Start Date: Enter the date of the group session.

Billable: Select **Yes**.

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

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

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

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

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



Location: Select the appropriate facility.

Service: For OS, Select Group Counseling OS.

For IOS, select either *ODS clinical group-valid beginning 7/1/19 or
*ODS Patient Education Group valid beginning 7/1/19.

For **mixed OS/IOS**, select *ODS clinical group-valid beginning 7/1/19.

For OTP, select Group Counseling OTP

For Recovery Services, select **Recovery Service Group.

Note: The Note field is required to save and create the group session notes. **Enter** the type of the group, see example below.

Click **Save**.

Group Session Notes

Group Name: Session ID:

Group Type: ODS Group

Note Type: Start Date: End Date:

Billable: Start Time: End Time:

Calculate ODS units:

Lead Staff: Duration: Min

of Service Units/Sessions:

Location:

Service:

Co-Lead Staff:

Note:

Administrative Actions:

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



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



B) Creating Bulk Encounters

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

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

Note ODS Group

Administrative Actions Cancel Save Finish

Attendees Perform Action Add Attendee

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

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

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

# Attnd	Status
1	Present
1	Present

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

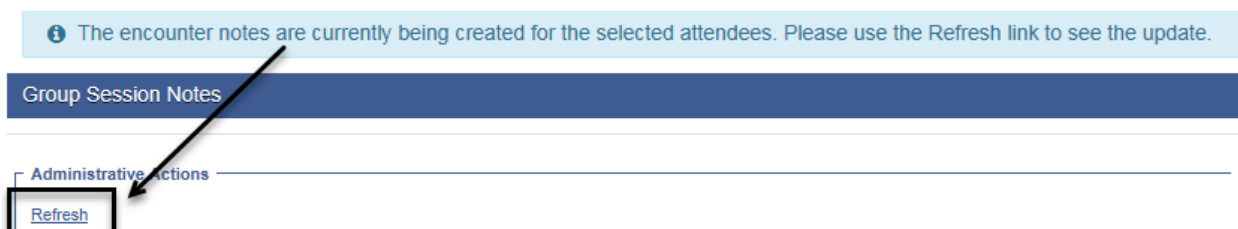
1. Place a **check mark** again on all the clients who were previously marked present
2. Select **Create Encounter** from the dropdown menu
3. Click **Perform Action**

Attendees Create Encounter Perform Action

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



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



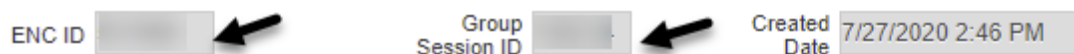
C) Updating Individualized Encounters

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

Attendees					
Actions	Individual Note	Misc. Notes	Encounter	<input type="checkbox"/>	Client Name
		Create	View ←	<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 or no show.





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

Billable

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

Medi-Cal Billable:

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

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

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

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

Group Session Travel Duration	<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

Contact Type: Select one from the dropdown menu. If telehealth is selected, telehealth should also be selected as the service location.

Contact Type

Pregnant/Postpartum: If the field is active, select **Yes** or **No**,

If the client is male, the Pregnant/Postpartum field is hidden.

If the client is female, the facility is perinatal certified, and yes was selected in the perinatal indicator of the program enrollment, the field defaults to Yes and is read only.

If the client is female and the facility is not perinatal certified, the Pregnant/Postpartum field becomes required.

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?: The EBP defaults to None and should be modified to the correct EBP. Deselect None first before selecting the EBP used.

Which Evidence-Based Practices were used?

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

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



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

IMPORTANT: The calculation happens when the encounter is released. Therefore, if a client needs to be added or removed from the session after the encounters have been released, the claims must be rejected first, then make the necessary corrections to the group session and then re-release.

NOTES



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**.

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

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

Note Type: Select Non Billable.

Note Type

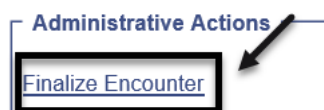
Visit Type: Select GP-Group for clinical group.

Visit Type

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

Review the rendering staff and change if necessary.

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



Note: For Group Members who were scheduled to the group section and were excused, select the names of the attendees, then on the dropdown menu to the right select "Mark as Excused" and click "Perform Action".

NOTES



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**.

The screenshot shows a navigation pane on the left with 'Group List' selected. The main area displays the 'Group Profile List' with a table. The table has columns for 'Actions', 'Group Name', and 'Group Type'. One row is visible for 'Motivational Group A' with 'ODS Group' as the type. The 'Actions' column for this row contains a pen icon and buttons for 'Review', 'Delete', 'Session List', and 'Group Roster'. The 'Group Roster' button is highlighted with a black box, and an arrow points from the 'Group List' menu item to it.

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

The screenshot shows the 'Roster' screen with a table. The table has columns for 'Actions', 'Client Name', 'Program', '# of Approved Session', '# of Sessions Attended', 'Status', and 'Status Effective Date'. There are three rows of data, each with a pen icon in the 'Actions' column and 'Active' status. At the bottom of the screen, there is a blue bar with an 'Add Member' button highlighted by a black box and an arrow pointing to it.



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

Click **Save**.

Client Name Program

of Sessions Approved Status

of Sessions Attended Status Effective Date

Client Due Reason

Click **Finish**.



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

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

Click Group List → Actions → Session List

Home Page

▶ Agency

▼ Group List

Session List

Group Type

Residential Unit Dashboard

▶ Residential Unit Mgmt

▶ Client List

Group Profile Search

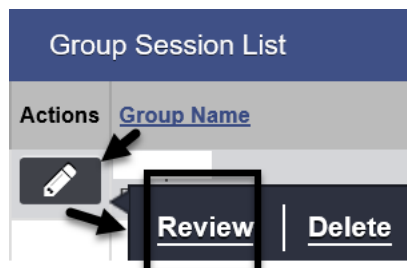
Type Lead Staff

Group Profile List

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



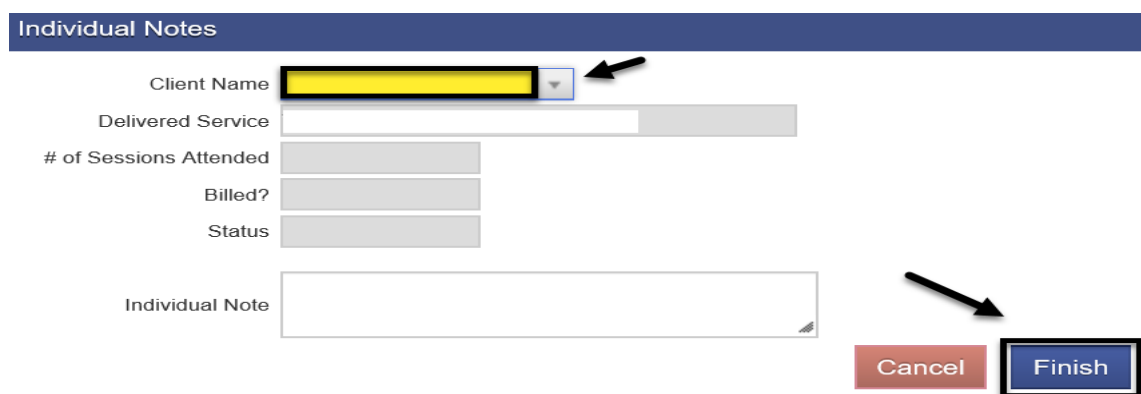
At the Group Session List, hover over the pen in Actions, and click **Review**.



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



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



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





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

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

Attendees

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

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

Attendees

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

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



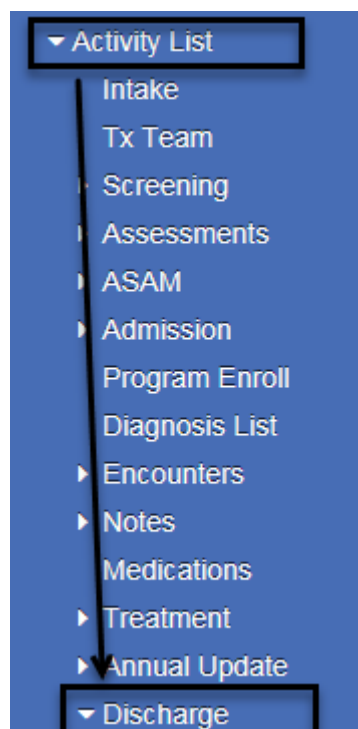
DISCHARGE



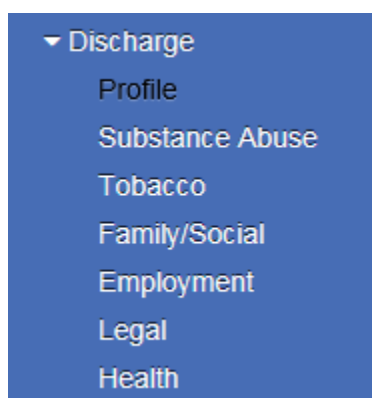
Note: A program enrollment must be ended prior to completing a client discharge.

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

Click Activity List → Discharge




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





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

Discharge Profile

Discharge Date  Admission Date

Discharge Status

Ancillary Services Referral

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

Record Status

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

[Mark as Deleted](#)

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

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

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

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



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



ENCOUNTER DATA REPORT

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

Report Title Contains: **Go**

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

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
IOS	Intensive Outpatient Services
MAT	Medication Assisted Treatment
ODS	Organized Delivery System
OS	Outpatient Services
OTP	Opioid Treatment Program
SanWITS	San Diego Web Infrastructure for Treatment Services
SUD	Substance Use Disorder
TX	Treatment
UCN	Unique Client Number



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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

1-800-834-3792 x3

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

www.optumsandiego.com

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

