



# 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.



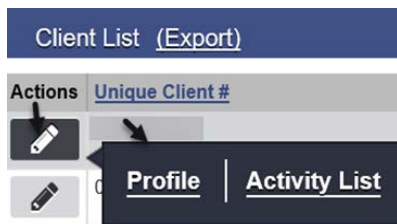
Complete the search parameters and click **GO** to search the client profile.

**Client Search**

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

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

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

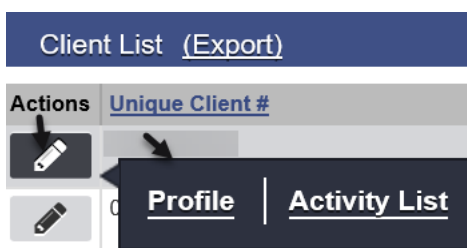




Verify the status of completed activities from the Activity List.

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

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



Click **Payor Group Enrollment**.



At the Payor List screen, 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.

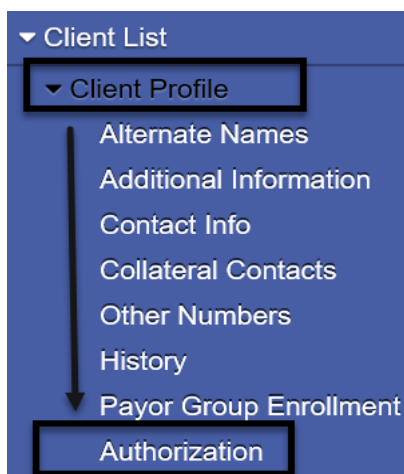
After receiving the initial 15-day level of care request from the residential facility, Optum will respond within 24 hours. The authorization may be approved, denied or have a different level of care approved. Within ten days after the initial authorization was approved, an authorization request for 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:** Defaults to Residential Bed Day, if DMC or County Billable.

**Plan:** Prepopulates with ODS Residential. Do not change it; this is correct.

**Authorization #:** When saved, the system generates the unique authorization number.

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

**End Date:** Enter an end date which must correspond to the number of units authorized.

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

**Contract:** Defaults to the contract that is set up. Do not change; this is correct.

**Authorization**

Group Enrollment	Residential Bed Day (7/1/2020)	Status	Active
Plan	ODS Residential	Contract	
Authorization #		Date Approved	
Administering Agency	Residential Agency 1	Updated Date	
Effective Date		Updated By	
End Date			

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 #:** The system generates the number assigned to the authorization.

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

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

**Authorized Services**

Service **Residential Bed Day 3.1 (New)**

Authorization #

# Authorized Units **15**

# Used Units 0

**Cancel Save Finish**

At the Authorization screen, click **Save** and **Finish**.

**Authorization**

Group Enrollment Residential Bed Day (7/1/2020) Status Provisional

Plan ODS Residential Contract

Authorization # Date Approved

Administering Agency Residential Agency 1 Updated Date

Effective Date Updated By

End Date

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**Authorized Services List** [Add Service](#)

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
	Residential Bed Day 3.1 (New)	15	\$15.00	\$0.00	\$0.00	15.00

**Cancel Save Finish**





## **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**.

The screenshot shows the 'Authorization Dashboard Search' form. It has a dark blue header with the text 'Authorization Dashboard Search'. Below the header are several input fields arranged in a grid. The fields are: Client First Name, Client Last Name, Provider Agency (pre-filled with 'Residential Agency 1'), Unique Client Number, Facility, Contracting Agency, Authorization #, Payor Group, Administering Agency, Auth Effective Date, Change Request Date, Plan, Auth End Date, Last Update, Request Updated By, Auth Status, and Change Request Status. At the bottom, there are two large grey boxes for 'Primary Staff' and 'Selected Staff' with arrows between them, and an 'ASAM LOC' dropdown. At the bottom right, there are two buttons: a red 'Clear' button and a blue 'Go' button. An arrow points to the 'Go' button.



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)							
<u>Auth #</u>	<u>Auth Status</u>	<u>Client Name</u>	<u>Auth Effective Date</u>	<u>Auth End Date</u>	<u>ASAM LOC</u>	<u>Last Update</u>	
<a href="#">107723</a>	Provisional						Res
	Closed						Res
	Provisional						Res
	Denied						Res
	Active						Res

**NOTES**

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## VERIFYING BED AVAILABILITY

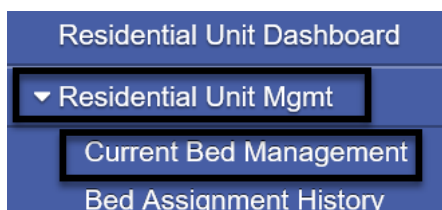


**Notes:** 1) In order to enroll a client into the program, there must be an **available bed**. 2) Bed assignments need to be in **chronological** order.

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



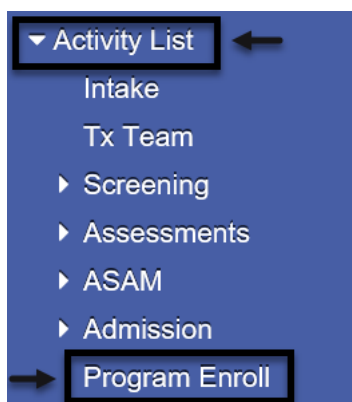
## PROGRAM ENROLLMENT

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.

**IMPORTANT:** Before adding a program enrollment in the system, availability of a bed **MUST** first be checked. Bed assignment is part of the program enrollment process.

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

Click Activity List → Program Enroll



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

Program Enrollment

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

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





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

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

**Program Name:** Select one from the list, e.g. ODS 3.1 RES.

If the Program Name field is blank, the Start Time field is hidden. After selecting a program name, the Start Time field is activated and becomes required.

**Start Time:** Enter the time the client is admitted to the facility. The Start Time field is activated only after selecting the program name.

**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**

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.



**Notes:** *1) Open a program enrollment for **Recovery Services** if the facility provides recovery services. Authorization and Admission are not required for recovery services. 2) Close the existing LOC program enrollment and open a new program enrollment when **changing level of care** to ensure accuracy of client records and for billing purposes.*

## NOTES

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## 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**   ▶

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.

To assign a bed using the Room# column, hover over any of the vacant beds and click the link.

Bed Assignment						
Actions	Inpatient Unit	Room #	Bed #	Bed Status	Virtual Bed	
		<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	

### A. 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 #. In the Administrative Actions section, click **Assign Bed**.

Room # Details

Unit \_\_\_\_\_ Room \_\_\_\_\_

**Bed # .Vacant**

Gender \_\_\_\_\_ Client Name \_\_\_\_\_  
Language \_\_\_\_\_ Client MPI \_\_\_\_\_  
Violence \_\_\_\_\_ Sexual Orientation \_\_\_\_\_  
Client's Characteristics \_\_\_\_\_ Medical Acuity \_\_\_\_\_  
Bed Assignment Date \_\_\_\_\_  
Expected Date of Discharge \_\_\_\_\_

General Comments \_\_\_\_\_

**Administrative Actions**

**Assign Bed** ←

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 \_\_\_\_\_ Bed # \_\_\_\_\_  
Room \_\_\_\_\_ Bed Status Vacant

**Client Bed Attributes**

Client Name \_\_\_\_\_ Client MPI \_\_\_\_\_  
Gender \_\_\_\_\_ Sexual Orientation \_\_\_\_\_  
Language English Medical Acuity \_\_\_\_\_  
Violence \_\_\_\_\_  
Client's characteristics \_\_\_\_\_ Bed Assignment Date 3/1/2020 Time 8:00 AM  
Expected Date of Discharge \_\_\_\_\_

General Comments \_\_\_\_\_

Cancel **Save** Finish



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

### B. 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, on the selected bed hover over the pen and click **Assign**.

Bed Assignment					
Actions	Inpatient Unit	Room #	Bed #	Bed Status	Virtual Bed
	[redacted]	[redacted]	[redacted]	Vacant	No
	[redacted]	[redacted]	[redacted]	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 # [redacted] 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]
General Comments [text area]	Bed Assignment Date 3/1/2020 Time 8:00 AM
	Expected Date of Discharge [yellow box]
	Cancel Save Finish



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?

Yes No

The Bed Assignment window reopens displaying a list of vacant beds. The bed that was assigned to the client is no longer listed as vacant.

Bed Assignment for [redacted]

Facility: Residential #2 Room #: [input]  
 Residential Unit: [dropdown] Bed #: [input]  
 Bed Status: Vacant  
 Virtual Bed: [dropdown]

Finish Clear Go

Actions	Residential Unit	Room #	Bed #	Bed Status	Virtual Bed
[edit]	[redacted]	100	1	Vacant	No
[edit]	[redacted]	100	2	Vacant	No
[edit]	[redacted]	100	3	Vacant	No

### Moving a Client to Another Bed

There may be times when a client needs to be moved within the unit. 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

Residential Unit Dashboard

- Residential Unit Mgmt
- Current Bed Management
- Bed Assignment History



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

**Current Bed Management Search**

Agency: Residential Train

Facility: RES Train 2

Inpatient Unit: [Empty dropdown]

Room #: [Empty text box]

Bed Status: [Empty dropdown]

Client First Name: [Empty text box]

Client Last Name: [Empty text box]

Expected Date of Discharge: [Empty text box]

Bed #: [Empty text box]

Clear [Go]

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 (Export)**

Actions	Facility	Inpatient Unit	Room #	Bed # / Status	Virtual Bed	Program Enrollment	Client	Client Name	Exp Disc
[Pen icon]	RES Train 2	[Blurred]	[Blurred]	Vacant	No	[Blurred]	[Blurred]	[Blurred]	[Blurred]
[Pen icon]	RES Train 2	[Blurred]	[Blurred]	Occupied	No	RES Train 2/ODS 3.1 RES	[Blurred]	[Blurred]	[Blurred]
[Pen icon]	RES Train 2	[Blurred]	[Blurred]	Occupied	No	RES Train 2/ODS 3.1 RES	[Blurred]	[Blurred]	[Blurred]

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
[Pen icon]	[Blurred]	[Blurred]	[Blurred]	Vacant
[Pen icon]	[Blurred]	[Blurred]	[Blurred]	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	<input type="text"/>	Bed #	<input type="text"/>
Room	<input type="text"/>	Bed Status	Vacant
<b>Client Bed Attributes</b>			
Client Name	<input type="text"/>	Client MPI	<input type="text"/>
Client's characteristics	<input type="text"/>	Bed Assignment Date	3/19/2020 <input type="text"/>
		Expected Date of Discharge	<input type="text"/>
		Time	4:31 PM

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 swap client beds, hover over the pen in Actions and click **Swap**.

Bed Re-Assignment						
Actions	Inpatient Unit	Room #	Bed #	Status	Virtual Bed	Client Name
	<input type="text"/>	<input type="text"/>	<input type="text"/>	Occupied	No	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	Occupied	No	<input type="text"/>

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: 3/19/2020

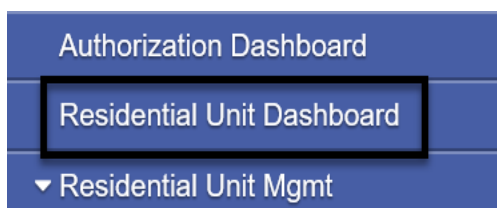
Bed Assignment Time: 6:05 PM



## 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:

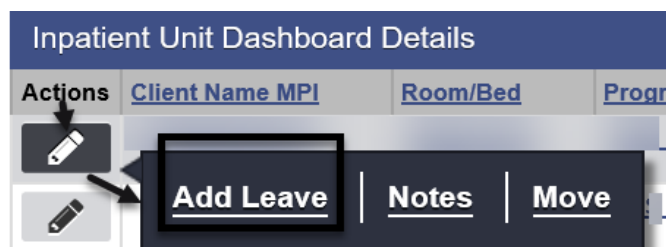
Click Residential Unit Dashboard.



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: [Dropdown] Description: [Text] Hold Client's bed?: [Yes] [Dropdown]

Leave Start Date: [Calendar] Leave Start Time: [Time] Expected Return Date: [Calendar] Expected Return Time: [Time]

Leave End Date: [Calendar] Leave End Time: [Time]

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 -**

Actions	Leave Type	Leave Start Date and Time	Expected Return Date and Time	Leave End Date and Time
	Day Pass	9:00 AM	8:00 AM	

To change the expected return date and time, hover over the pen in Actions and click **Review**.

**Client Leave List for Program Enrollment -**

Actions	Leave Type	Leave Start Date and Time	Expected Return Date and Time
<b>Review</b>	Day Pass	9:00 AM	8:00 AM





The Client Leave Details screen re-opens. Change the expected return date and expected return time fields. Click **Save** and **Finish**.

**Client Leave Details**

Leave Type: Day Pass    Description: Off Unit with Day Pass, exp    Hold Client's bed?: Yes

Leave Start Date: [ ]    Leave Start Time: 9:00 AM    Expected Return Date: [ ]    Expected Return Time: 8:00 AM

Leave End Date: [ ]    Leave End Time: [ ]

Notes: [ ]

**Cancel**    **Save**    **Finish**

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



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

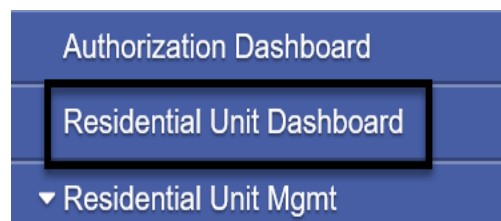
The leave status color is blue if the client is out but still within the expected date of return. The status color is red if the client failed to return on the expected return date and time.

**Residential Unit Dashboard Details**

Actions	Client Name MPI	Room/Bed	Program Enrollment	Admission Date	Primary Clinician	Attending Physician	Leave Status
	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	Day Pass
	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	Day Pass

**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**.

Residential Unit

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
							<a href="#">Day Pass</a>

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.



## DAILY CENSUS

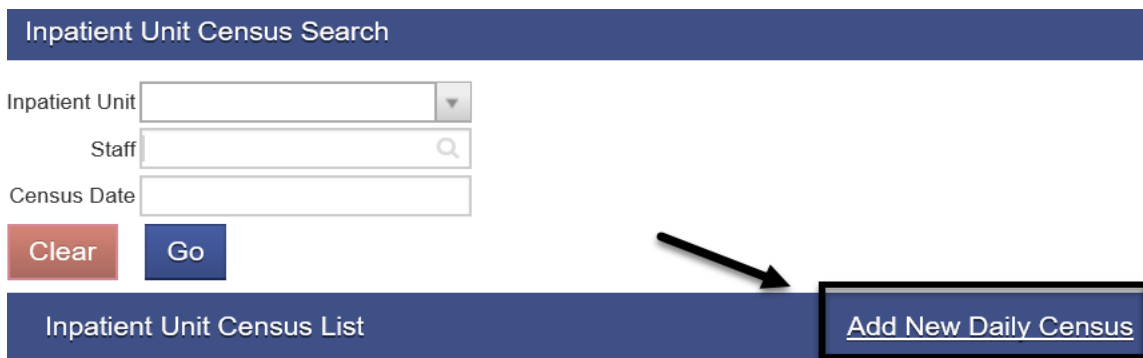
The Residential Unit Census creates bulk encounters for all selected clients that currently occupy a bed. A daily census must be completed for the previous day.

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

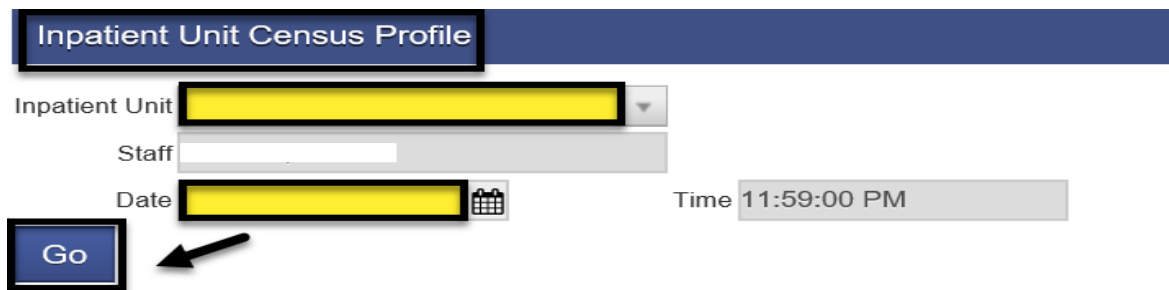
Click Residential Unit Mgmt → Residential Unit Census



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**.

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

Cancel   **Create New Census**

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](#)

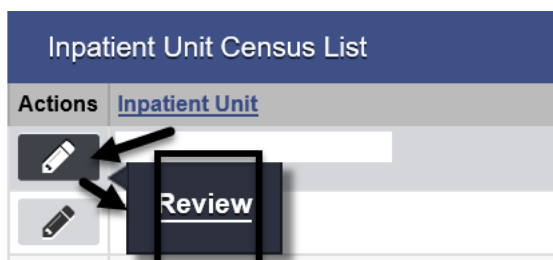
Actions	<u>Inpatient Unit</u>	<u>Census Date/Time</u>	<u>Staff</u>
			Staff, Rendering



## 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:

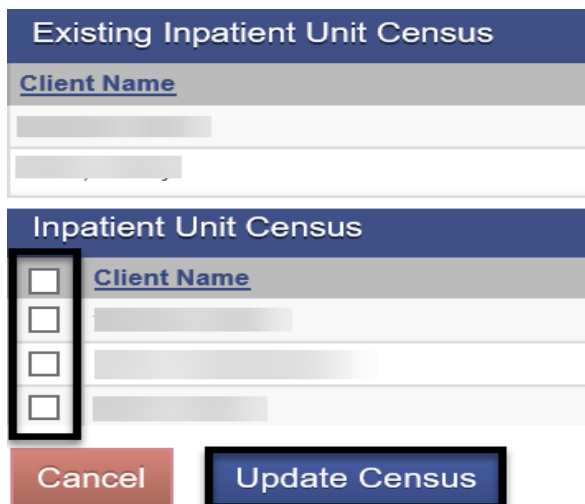
Click **Review**



**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**.

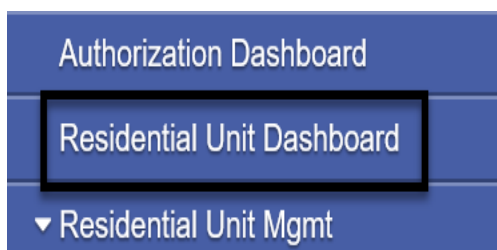




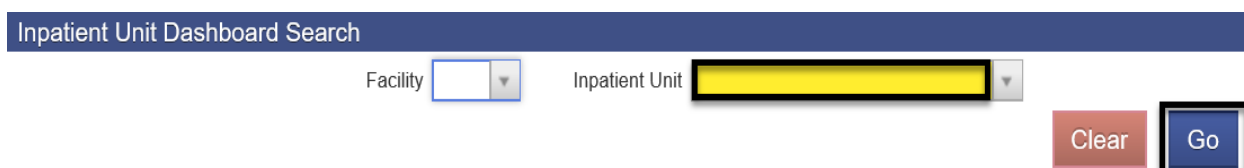
## Updating Daily Census Notes (Bed Day Encounters)

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

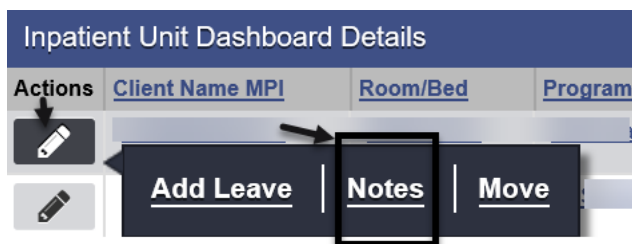
Click Residential Unit Dashboard.



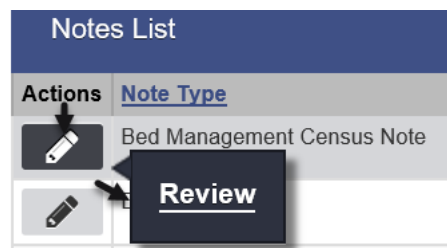
Select the Inpatient Unit and click **GO**.



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.

**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:** 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.

**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: [ ]

Visit Type: BD-Bed Day - Residential

# of Service Units/Sessions: 1

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:** 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.

Which Evidence-Based Practices were used?

Evidence-Based Practices: Motivational Interviewing, Relapse Prevention, Other

Used Evidence-Based Practices: None

Diagnoses for this Service

Primary	F10.11-Alcohol use disorder, Mild, In early remission(DSM 5)
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.

Review the accuracy of the encounter before clicking **Save** and **Finish**.

Rendering Staff Staff, Rendering ▼ ←

Secondary Staff  ▼

Supervising Staff  ▼

**Administrative Actions**

[Release to Billing](#) ←

Cancel Save Finish ▶▶

## NOTES

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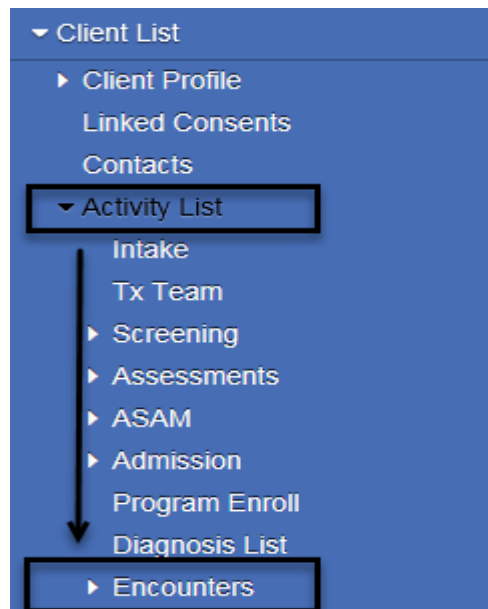
## CASE MANAGEMENT ENCOUNTERS



**Notes:** Although you have 7 days to enter case management encounters, the recommendation is to enter these encounters daily.

Residential bed day (RBD) encounters **must** be created through the Daily Census. However, 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 system displays recent encounters up to one year.

Encounter Search

Start Date: 9/10/2019      End Date: 9/9/2020

Rendering Staff:       Service:

Encounter Status:       Program:

Allow Disclosure of Notes:       Group Session ID:

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

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Group Session ID	Status
	7/1/2020	*Residential Bed Day 3.1		Admin Staff, Fake	ODS 3.1 RES		Not Released



## Searching for a Previously Entered Encounter

Even though the default lookback 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**

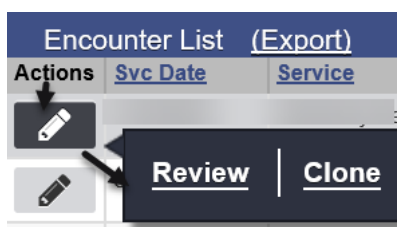
Start Date:  End Date:

Rendering Staff:  Service:

Encounter Status:  Program:

Allow Disclosure of Note:  Group Session ID:

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.

Encounter 2 of 3

Note Type: DMC Billable

ENC ID:  Created Date: 2:04 PM

Program Name: Residential #2/ODS 3.1 RES :

Service: Case Management 3.1 RES

Billable: Yes

Disallowed: No

Start Date:  End Date:

Start Time:  End Time:

Service Location: Telehealth

Travel Duration: 0 Min

Documentation Duration: 10 Min

Session Duration: 60 Min

Total Duration: 70 Min

Contact Type: Telehealth

Emergency:

Visit Type: CM-Case Management

# of Service Units/Sessions: 1

Medi-Cal Billable: Yes



## Adding an Encounter

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

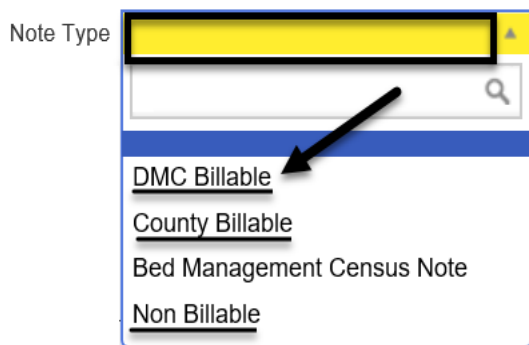


At the Encounters window, click **Add Encounter**.



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

**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  Documentation Duration  Min   
Session Duration  Min  Total Duration  Min



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



**Important Note:**

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

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

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

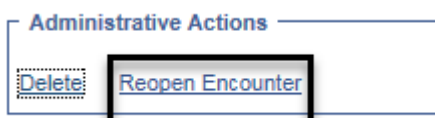
## Administrative Actions



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.

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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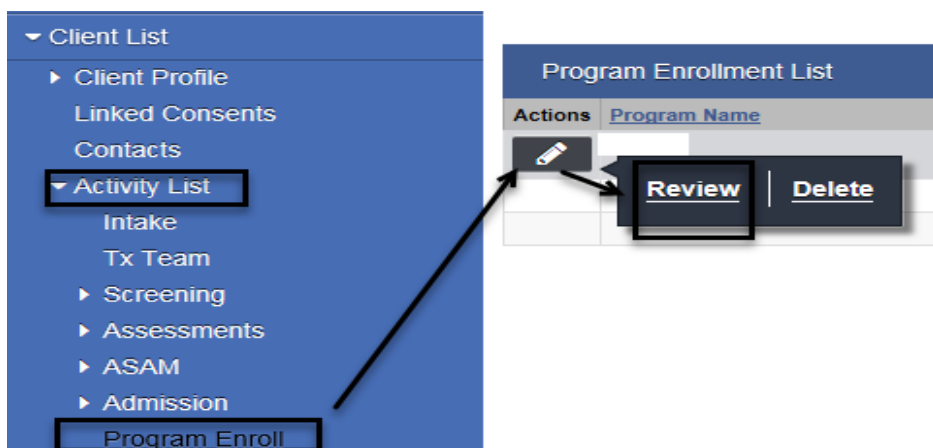


## ENDING PROGRAM ENROLLMENT

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 and time of discharge on the **End Date** and **End Time** fields. 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	<input type="text" value="Staff, Rendering"/>	PS Court Phase	<input type="text"/>		
Perinatal	<input type="text" value="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]

Administrative Actions:

- Transfer to another Program within the current case and assign the Client to a different bed
- Transfer to another Program within the current case and keep the Client in the same bed

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: [Dropdown]

Perinatal: No

Termination Reason: [Dropdown]

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. This program enrollment for a Non BHS Contracted client is not linked to bed assignment but is used only for monitoring purposes.

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

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

The screenshot shows a web form titled "Program Enrollment Profile" in a blue header. Below the header, there are two input fields. The first is labeled "Facility" and is a greyed-out text box. The second is labeled "Program Name" and is a dropdown menu. The dropdown menu is open, showing "Non BHS Contracted Client" as the selected option, which is highlighted in yellow. A black arrow points from the left towards the dropdown menu.

## NOTES

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## DISCHARGE

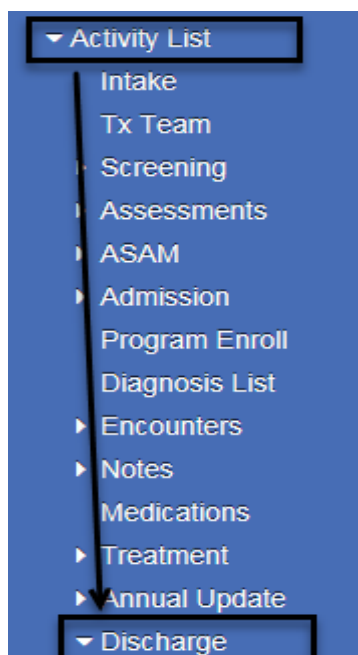


**Note:** A program enrollment must be ended prior to completing a client discharge.

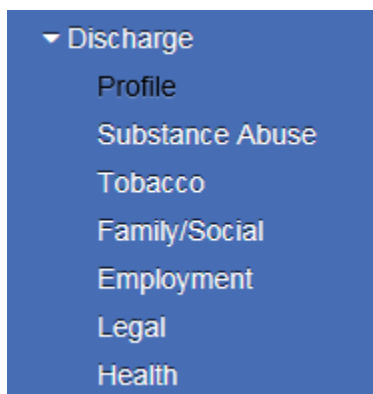
If there is any change in LOC, client leave, or bed movement, these activities must be recorded in chronological order and must be completed before discharging the client.

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	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](#) Cancel Save Finish 

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?**

Yes No



**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	<input type="text"/>	Start Date	<input type="text"/>	
Program Name	<input type="text" value="Recovery Services"/>	End Date	<input type="text"/>	
Program Staff	<input type="text"/>	PS Court Phase	<input type="text"/>	
Perinatal	<input type="text" value="No"/>			
Termination Reason	<input type="text"/>			
Notes	<input type="text"/>			

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.

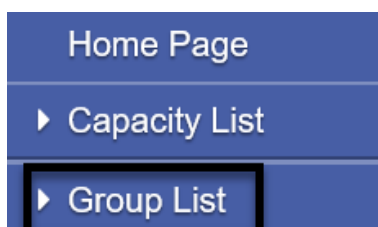
The Group List feature was enhanced specifically for Organized Delivery System (ODS) Group Counseling. The Group List module also allows clinicians to easily track clients who are seen in a group setting.

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:

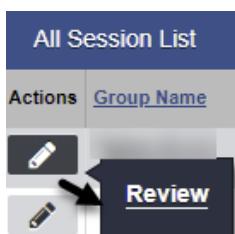
**Go**

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?	RenderingStaff	Date	Service Code	Service Description	Start Time	End Time
			RES Train 2	Yes	Staff, Rendering	7/1/2020		**Recovery Service Group	8:00 AM	9:00 AM

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



The system launches the group session notes.

**Group Session Notes**

Group Name:  Session ID:

Group Type: Recovery Services Group

Note Type: DMC Billable

Billable: Yes

Calculate ODS units: Yes

Travel Duration: 0  Min

Lead Staff: Staff, Rendering

Start Date: 7/1/2020

Start Time: 10:00 AM

Session Duration: 60  Min

Total Duration: 60  Min

# of Service Units/Sessions: 1

Location: Residential Substance Abuse TX Facility

Service: \*\*Recovery Service Group



**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							<a href="#">Add</a>
Actions	<a href="#">Group Name</a>	<a href="#">Group Type</a>	<a href="#">Lead Staff</a>	<a href="#">Day of Week</a>	<a href="#">Time of Day</a>	<a href="#">Start Date</a>	<a href="#">End Date</a>
		Recovery Services Group	Staff, Rendering		9:00 AM	7/1/2020	
		Recovery Services Group	Staff, Rendering		10:00 AM	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**.

**Group Profile List**

Actions	<a href="#">Group Name</a>	<a href="#">Group Type</a>
		Recovery Services
	<a href="#">Review</a>   <a href="#">Delete</a>   <a href="#">Session List</a>   <a href="#">Group Roster</a>	



The Group Profile screen launches showing the group name, start date, group type, time of day, lead staff, description, and the roster of members. The existing group profile can be updated or used as is to create billing via the **Create Group Session** section.

**Group Profile**

Group Name: [Text Field]  
 Start Date: 7/1/2020  
 End Date: [Calendar Icon]  
 Group Type: Recovery Services Group  
 Day of Week: [Dropdown]  
 Time of Day: 9:00 AM  
 Lead Staff: Staff, Rendering  
 Facility: RES Train 2  
 Co-Lead Staff: [List with Selection Arrows]  
 Selected Co-Lead Staff: [List]  
 Description: [Text Field]  
 Buttons: Cancel, Save, Finish

**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
[Blurred]	[Blurred]	RES Train 2/Recovery Services: 7/1/2020 -				1 Active	7/1/2020
[Blurred]	[Blurred]	RES Train 2/Recovery Services: 7/1/2020 -				1 Active	7/1/2020

## NOTES

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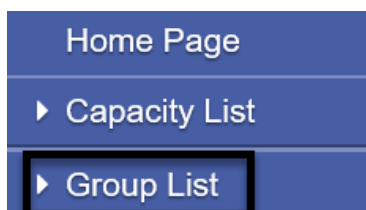
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## Adding a Group Profile

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							<a href="#">Show All Clients</a>	<a href="#">Edit Roster</a>
<a href="#">Client Name</a>	<a href="#">Unique Client #</a>	<a href="#">Program</a>	<a href="#">Client Due</a>	<a href="#"># of Approved Sessions</a>	<a href="#"># of Sessions Attended</a>	<a href="#">Status</a>	<a href="#">Status Effective Date</a>	



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**.



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

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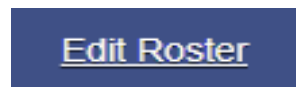
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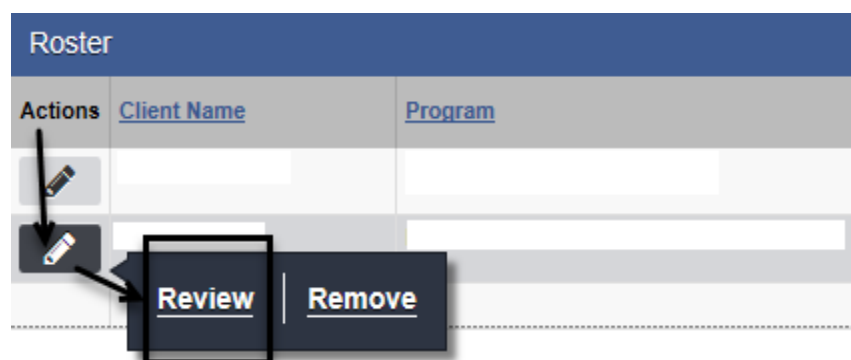


## Updating a Client Status

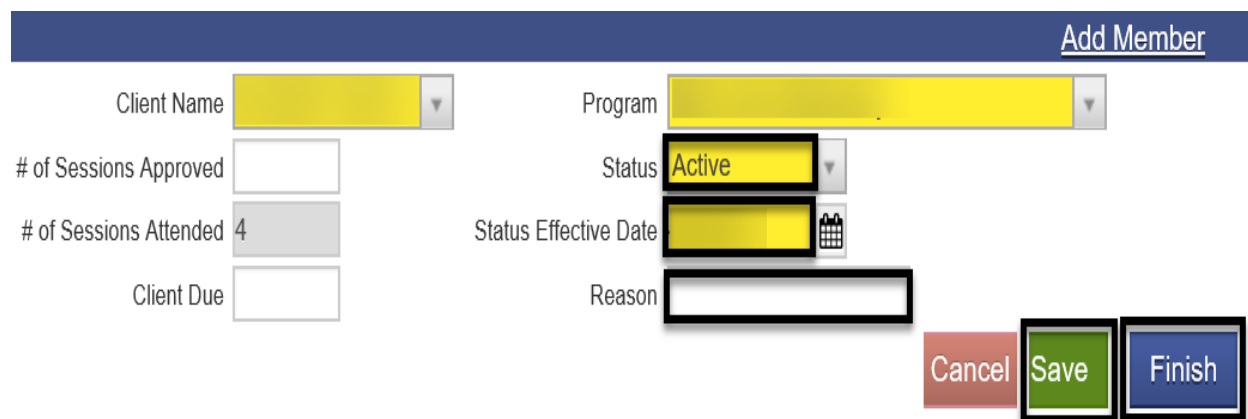
The client's status can be updated within the group profile screen by clicking on the link **Edit Roster**.



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**.

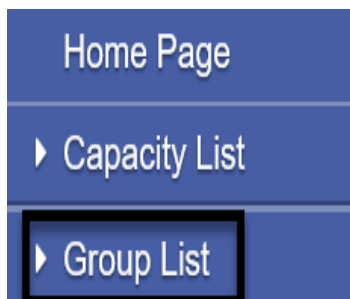


If the group profile window is not open and you want to update the status of a client member from the navigation pane:

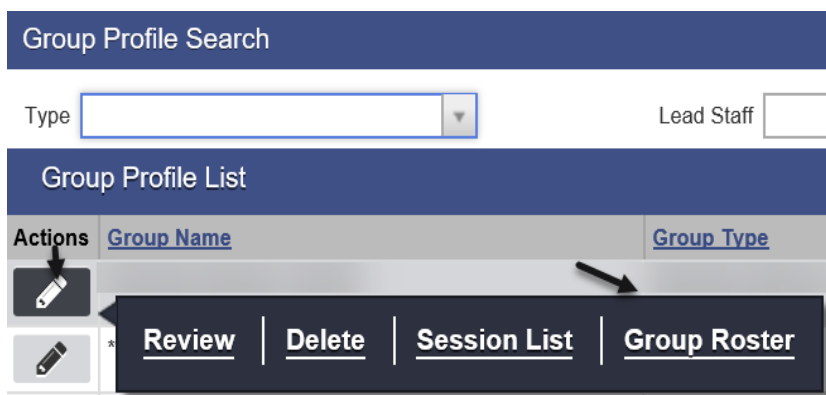




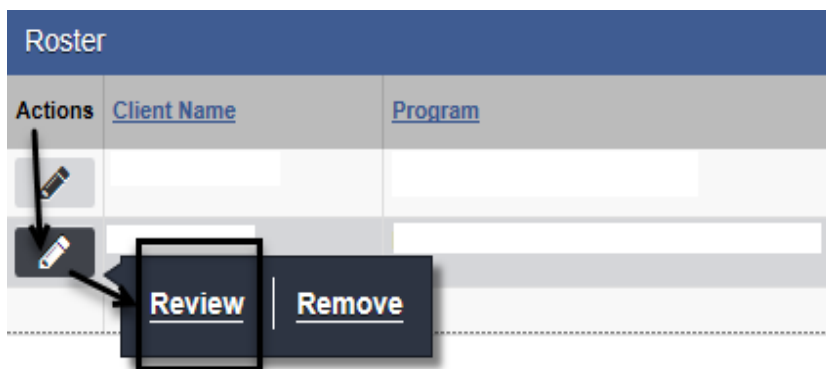
Click **Group List**.



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**.





Change the status, select the status effective date, and enter the reason for the change. 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"/>

**NOTES**

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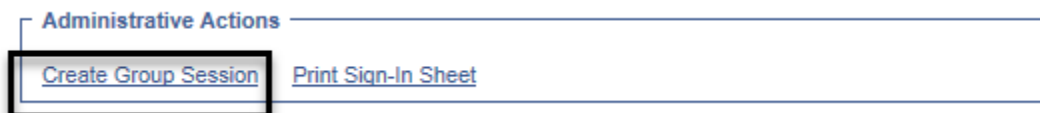


## GROUP BULK ENCOUNTERS

### 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 required to save the group session notes. **Enter** the type of the group, see example below.

Click **Save**.

**Group Session Notes**

Group Name: [ ] Session ID: [ ]  
Group Type: [ ]

Note Type: **DMC Billable** Start Date: [ ] End Date: [ ]  
Billable: **Yes** Start Time: **10:00 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 SUD TX Facility**  
Service: **\*\*Recovery Service Group**

Co-Lead Staff [ ] Selected Co-Lead Staff [ ]

Note: **Relapse Prevention**

Administrative Actions [ ] **Cancel** **Save** **Finish**

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



## 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**

Attendees								Mark as Present	Perform Action	Add Attendee
Actions	Individual Note	Misc. Notes	Encounter	Client Name	Unique Client #	# Attnd	Status			
			<input type="checkbox"/>			1				
			<input type="checkbox"/>			1				

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	Add Attendee
Actions	Individual Note	Misc. Notes	Encounter	Client Name	Unique Client #	# Attnd	Status			
		Create	<input checked="" type="checkbox"/>			2	Present			
		Create	<input checked="" type="checkbox"/>			2	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.

**i** The encounter notes are currently being created for the selected attendees. Please use the Refresh link to see the update.

Group Session Notes

Administrative Actions

Refresh

### 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.

ENC ID       Group Session ID       Created Date 7/27/2020 2:46 PM

**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.

Note Type **DMC Billable**

- DMC Billable
- County Billable
- Non Billable



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

Billable **Yes** ▼

**Medi-Cal Billable:** If DMC, select **Yes**. If County billable, select **No**.

Medi-Cal Billable: **Yes** ▼

**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	0	Min	▼	<i>i</i>	Documentation Duration	0	Min	▼	<i>i</i>
Session Duration	60	Min	▼	<i>i</i>	Total Duration	60	Min	▼	<i>i</i>

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

Contact Type **Face To Face** ▼

**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 **Yes** ▼



**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

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## 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 drop down 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	Client Name	# Attnd	Status
		<a href="#">Create</a>	<a href="#">Create</a>	<input type="checkbox"/>		Present
		<a href="#">Create</a>	<a href="#">Create</a>	<input checked="" type="checkbox"/>		No Show
		<a href="#">Create</a>	<a href="#">Create</a>	<input checked="" type="checkbox"/>		No Show

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

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

The encounter screen launches with only a few fields available for updating..

Encounter	
Note Type	DMC Billable
ENC ID	
Program Name	
Service	Recovery Services Group Counseling
Group Session ID	
Created Date	
Start Date	
End Date	
Service Location	Residential Substance Abuse TX Facility
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	Yes
Pregnant/Postpartum	
Was an interpreter used?	
In what language was the service provided?	
Which Evidence-Based Practices were used?	
Evidence-Based Practices	None
Used Evidence-Based Practices	Motivational Interviewing



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

**Note Type:** Select Non Billable.

Note Type

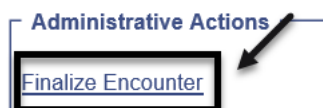
**Visit Type:** Select GP-Group.

Visit Type

The Billable field prepopulated with No and is read only. The Contact Type field prepopulated with No Show. Do not change it as this is accurate.

Review the rendering staff and change if necessary.

After completing the encounter, click **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

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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

Review | Delete | Session List | **Group Roster**

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**.

The screenshot shows the 'Add Member' form with the following fields and values:

- Client Name: [Yellow dropdown]
- Program: [Yellow dropdown]
- # of Sessions Approved: [Empty text box]
- # of Sessions Attended: [Greyed out text box]
- Client Due: [Empty text box]
- Status: [Yellow dropdown]
- Status Effective Date: [Yellow date picker]
- Reason: [Empty text box]

Buttons: Cancel (red), Save (green, highlighted with a black border), Finish (blue).

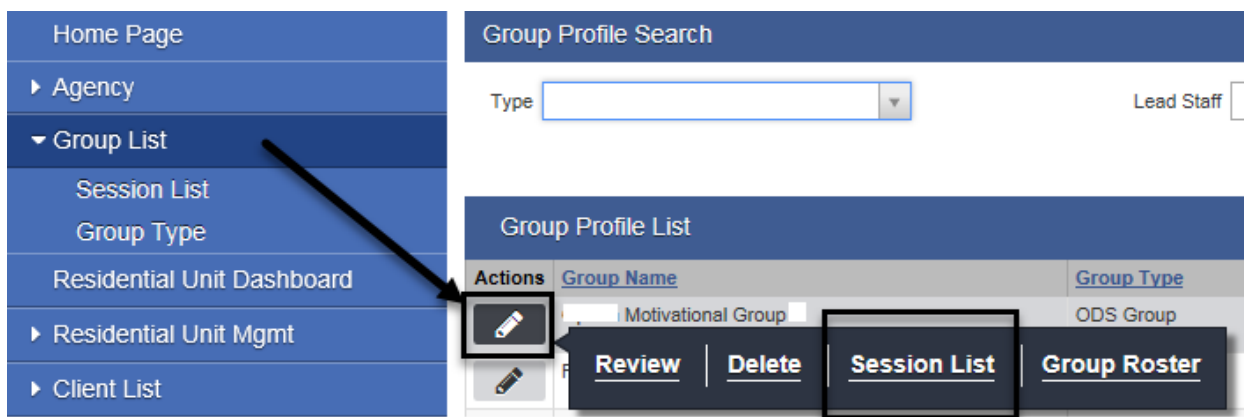
Click **Finish**.



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

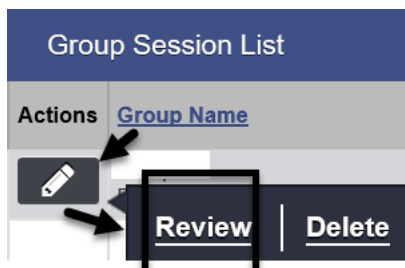
The encounter for the new member who joined the group session should be added via the group module. To create an encounter for the new client, from the navigation pane:

Click Group List → Actions → Session List





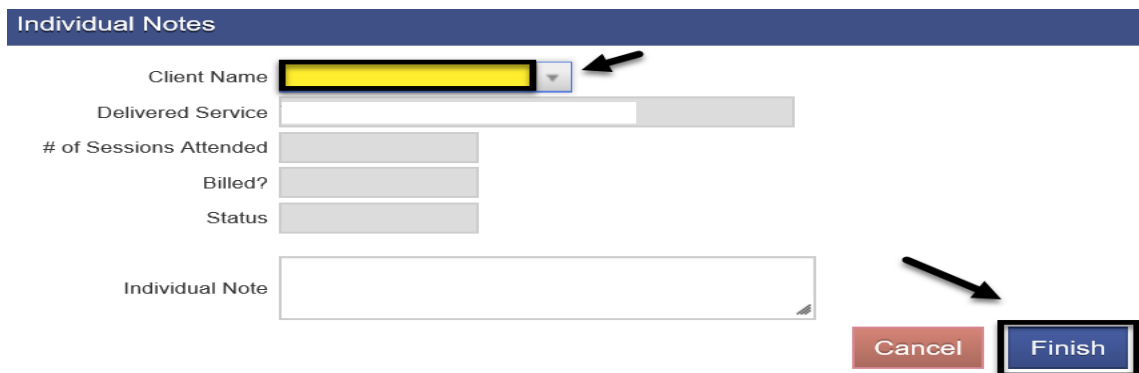
At the Group Session List, hover over the pen in Actions, and click **Review**.



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
		<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](#)

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**

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

[SUD\\_MIS\\_Support.HHSA@sdcounty.ca.gov](mailto: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](mailto:QIMatters.HHSA@sdcounty.ca.gov)

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

[ADSBillingUnit.HHSA@sdcounty.ca.gov](mailto: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.

