



SUBSTANCE USE DISORDER MIS

OUTPATIENT/OTP ENCOUNTERS AND GROUP MODULES



Live Well San Diego

County of San Diego Behavioral Health Services TABLE OF CONTENTS



Table of Contents	2
Confidentiality	3
SanWITS Software Basics	4
Verifying Client Profile	5
Program Enrollment	7
Non-BHS Contracted Client	9
Ending Program Enrollment	10
Changing Level of Care	11
Recovery Services	11
Encounters	12
Searching for Encounters	13
Adding Encounters	14
OTP Dosing Encounters.....	21
Group List	22
Searching a Group Profile.....	24
Adding a Group Profile.....	26
Group Bulk Encounters.....	32
Creating Group Session Notes (Encounters).....	32
Adding Encounters for No Shows.....	38
Adding a New Client to an Existing Group List.....	42
Discharge.....	46
Encounter Data Report.....	48
Glossary	49
Contact Information.....	50

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

Title 42 CFR Part 2 imposes strict privacy and confidentiality protection of all Substance Use Disorder (SUD) client information.

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 Policies 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 client record 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 privacy and confidentiality of SUD client records. 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.

Safe and Secure – 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: **Fake*** Last Name: **Clie***

SSN: **999*** DOB: []

SanWITS Training Client Id: []

Unique Client Number: **cf*** Provider Client ID: []

Treatment Staff: [] Primary Care Staff: []

Case Status: All Clients Intake Staff: []

Other Number: [] Number Type: []

Include Only Active Consents: Yes []

Clear **Go**

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**.

Client List ([Export](#))

Actions	Unique Client #

Profile | Activity List

Click **Payor Group Enrollment**.

▼ Client List

▼ Client Profile

Alternate Names

Additional Information

Contact Info

Collateral Contacts

Other Numbers

History

Payor Group Enrollment

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

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

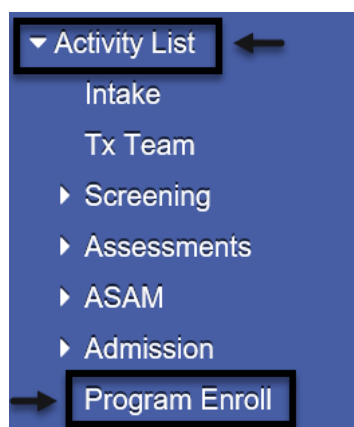


PROGRAM ENROLLMENT

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					
<input type="button" value="Add Enrollment"/>					
Actions	Program Name	Start Date	End Date	Facility	Notes



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

Facility: This field is pre-populated from the Facility entered at Intake screen

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.

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.

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

Perinatal: The perinatal field in the Program Enrollment screen will show based on the facility certification to provide perinatal services.

If client is male, the perinatal field will be 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"/>
Program Name	<input type="text"/>	End Date	<input type="text"/>
Program Staff	Staff, Rendering	PS Court Phase	<input type="text"/>
Perinatal	<input type="text"/>		
Termination Reason	<input type="text"/>		
Notes	<input type="text"/>		

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

Cancel	Save	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.

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 used 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**.

Program Enrollment Profile

Facility

Program Name **Non BHS Contracted Client**

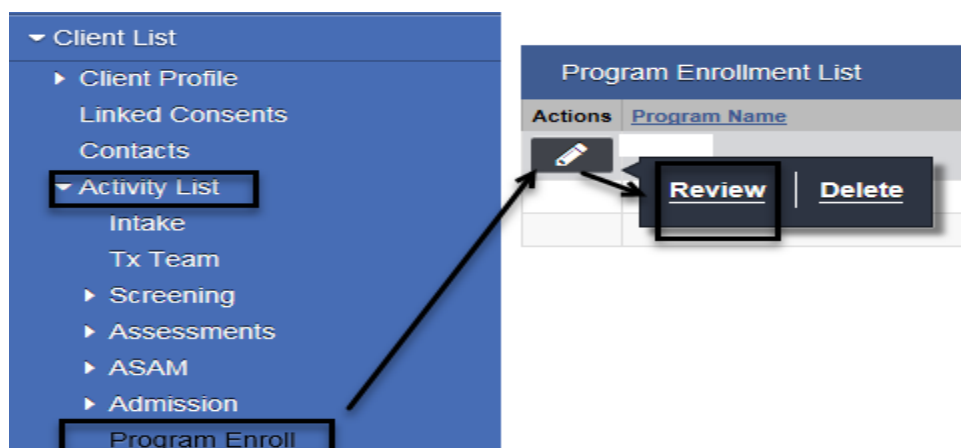


ENDING PROGRAM ENROLLMENT

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.

Program Enrollment Profile

Facility	Main Facility	Start Date	7/1/2020
Program Name	ODS OS	End Date	
Program Staff	RenderingTest, Staff	PS Court Phase	
Perinatal	No		
Termination Reason			
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**.

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



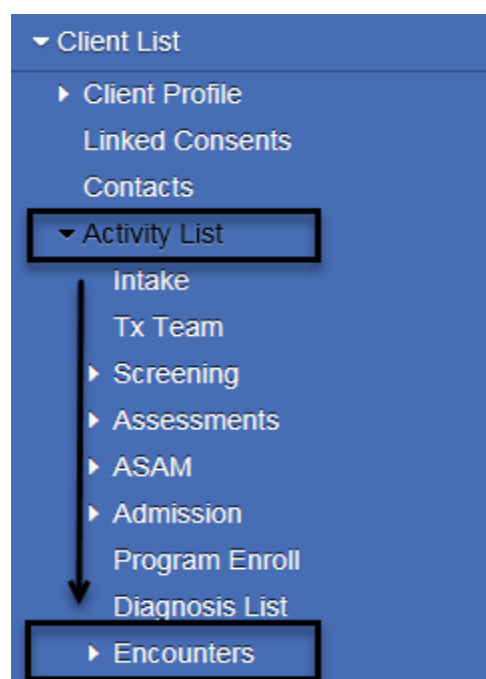
ENCOUNTERS



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 End Date

Rendering Staff Service

Encounter Status Program

Allow Disclosure of Note Group Session ID

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

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



Searching for a Previously Entered Encounter

Even though the default 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**.

Encounter Search

Start Date End Date

Rendering Staff Service

Encounter Status Program

Allow Disclosure of Note Group Session ID

Clear Go

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

Encounter List (Export)

Actions	Svc Date	Service
		Individual Counseling OTP

Review Clone

The encounter ID and Created Date and Time is generated by the system when the encounter is saved.

Encounter

Rendering Staff Note Type ENIC ID Created Date

Program Name Service Billable Disallowed

Service Location Start Date End Date Start Time End Time Duration

Contact Type Emergency # of Service Units/Sessions Medi-Cal Billable

Pregnant/Postpartum Was an interpreter used? In what language was the service provided?

Which Evidence-Based Practices were used?

Evidence-Based Practices Used Evidence-Based Practices

Diagnoses for this Service

Primary Secondary Tertiary

Secondary Staff Supervising Staff



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.

Rendering Staff: This field is required. Select the appropriate staff who rendered the service. The rendering staff must have a valid National Provider Identifier (NPI). The selection of the Rendering Staff influences what values are available in the Service field.



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.



Note Type

DMC Billable

County Billable

Bed Management Census Note

Non Billable

Service: The service drop down will be filtered by the allowable services for the rendering staff's discipline. Select the appropriate billable service.

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

Disallowed: Defaults to No. This can be changed to Yes if the service is Disallowed. If a service should be billed enter No.

Disallowance Reason: If the Disallowed field is Yes the Disallowance Reason will be prompted and a reason must be selected.

There are different scenarios for Disallowed Services.

Option 1 - Encounter has not been released

Edit Encounter:

- 1) Note Type = Non-Billable
- 2) Billable = No
- 3) Disallowed = Yes
- 4) Disallowance Reason = Select appropriate reason from drop down menu
- 5) Medi-Cal Billable = No
- 6) Finalize Encounter

Option 2 - Encounter has been released, but not batched

Reject Claim and Edit Encounter:



- 1) In the Claim Item List, select 'Reject (Back Out)'
- 2) All encounter fields become editable
- 3) Follow steps in Option 1

Option 3 - Encounter has been released, batched, and submitted to the clearing house, but not billed

Contact Billing Unit and Edit Encounter:

- 1) Contact the Billing Unit for assistance with backing out the disallowed claim.
 - a. Billing Unit will reject the batch.
- 2) Encounter will be read only except for two fields: 'Disallowed' and 'Disallowance Reason'
- 3) Edit the two fields:
 - a. Disallowed = Yes
 - b. Disallowance Reason = Select appropriate reason from drop down menu

Option 4 - Encounter has been released, batched, and billed

Complete Payment Recovery Process and Edit Encounter:

- 1) Follow the steps to complete the Payment Recovery Process, as noted in the Billing Manual
- 2) Encounter will be read only except for two fields: 'Disallowed' and 'Disallowance Reason'
- 3) Edit the two fields:
 - a. Disallowed = Yes
 - b. Disallowance Reason = Select appropriate reason from drop down menu

Start Date: The Start Date is required. By entering the start date, this will auto-populate the active primary diagnosis on the Diagnosis field. By entering the date, this will also dictate the services available in the service dropdown field.

Start Date 

End Date: End Date is optional.

End Date 



Service Location: Select from the options based on the type of facility or location of service. The service location dropdown will be filtered by the locations allowed for the service selected. If Telehealth is selected as the service location, Telehealth should also be selected as the contact type.

Whenever a duration-based service is selected under the service dropdown the Documentation Duration and Travel Duration fields are optional.

Travel Duration: Enter the clinician's travel time in minutes. If there is no travel time, enter zero (0). This field is optional. Should not be included in the total service time.
For OTP, enter 0. OTP cannot bill for travel.

Documentation Duration: This field is optional and prepopulated with 0. Program should modify this field for each individual client. Should not be included in the total service time. *For OTP, enter 0. OTP cannot bill for documentation.*

Total Service Time: This field is required and should be entered manually reflecting the direct service time with the client. This field should reflect the exact direct/session time with the client. Travel and/or documentation time should not be included in the total service time.

Service Location [dropdown] Start Time [text] End Time [text]
Travel Duration [text] Min [dropdown] Documentation Duration [text] Min [dropdown]
Total Service Time [text] Min [dropdown]

For duration-based services, the # of service units/sessions field is calculated based upon what is entered in the Total Service Time field relative to the number of increments per unit and is auto populated. For unit-based services, the # of service units/ sessions field is read only and defaults to value "1".

Documentation Duration [text] Min [dropdown]
Total Service Time 30 Min [dropdown]
cy [dropdown]
of Service Units/Sessions 2
pe [dropdown] Medi-Cal Billable: [dropdown]



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. At least one Evidence Based Practice should be selected.

Which Evidence-Based Practices were used?

Evidence-Based Practices

None
Motivational Interviewing
Relapse Prevention
Other



Used Evidence-Based Practices



Diagnoses for this Service: The diagnosis field is editable and is required to release to billing. The active Primary Diagnosis will auto-populate when start date is entered. Field will remain editable. The choices will populate from any currently active diagnoses that have been entered via the Diagnosis List. Effective February 1, 2020, a diagnosis with DSM-5 Descriptor should be used.

Diagnoses for this Service

Primary	<input type="text" value="F12.10-Cannabis use disorder, Mild(DSM 5)"/>
Secondary	<input type="text"/>
Tertiary	<input type="text"/>

Click **Save**.



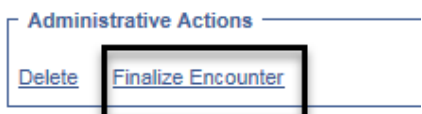


For the next step, select one of the appropriate administrative actions shown below.

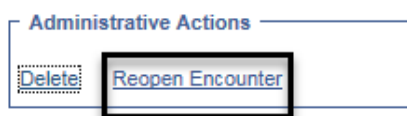
Administrative Actions



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**.





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	<input type="text"/>	Drug Quantity	<input type="text"/>	<input type="text"/>
--------------------	----------------------	---------------	----------------------	----------------------

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



GROUP LIST



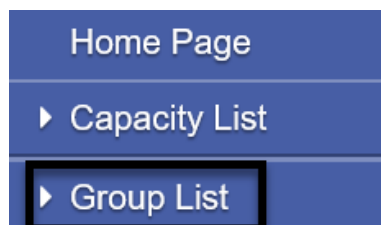
Notes: 1) The Group List must be used to create **bulk** encounters for individuals who attended a group session. 2) Do not mix Recovery Services with other groups. 3) If a Non-BHS Contracted Client attended a group session, mark the client as present but do not create an encounter. 4) **Group size**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

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**.





Outpatient/OTP Encounters and Group Modules Training

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 Date5/28/2020

End Date8/28/2020

Client's Name

Group Name


Unique Client Number

Calculate ODS units?

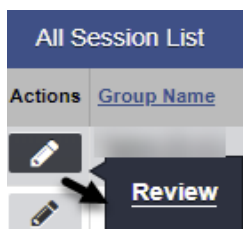
Group Session ID

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
	←		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

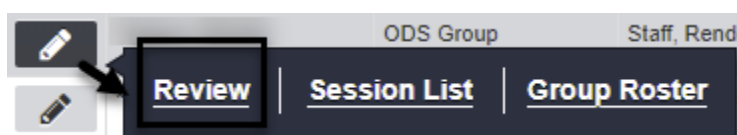
Client's Name Unique Client Number

Go

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**.





Group Profile

Group Name

Start Date

End Date

Group Type

ODS Group

Day of Week

Time of Day

Lead Staff

Room Location

Facility

Main Facility

Co-Lead Staff

Selected Co-Lead Staff

Description

Cancel

Save

Finish

Administrative Actions

[Create Group Session](#)

Roster

Client Name	Unique Client #	Program	Client Due	# of Approved Sessions	# of Sessions Attended	Status	Status Effective Date
						1 Active	7/1/2020
						2 Active	7/1/2020

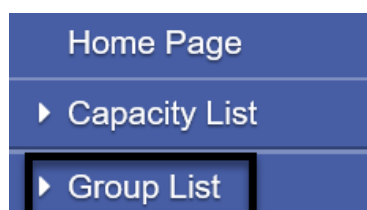
[illegible]



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

Main Facility

Co-Lead Staff

Selected Co-Lead Staff

Description

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



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**.

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. If a client is not showing in the drop-down menu, it means that a Program Enrollment has not been completed for the client. A Program Enrollment must be completed for each client before continuing.

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

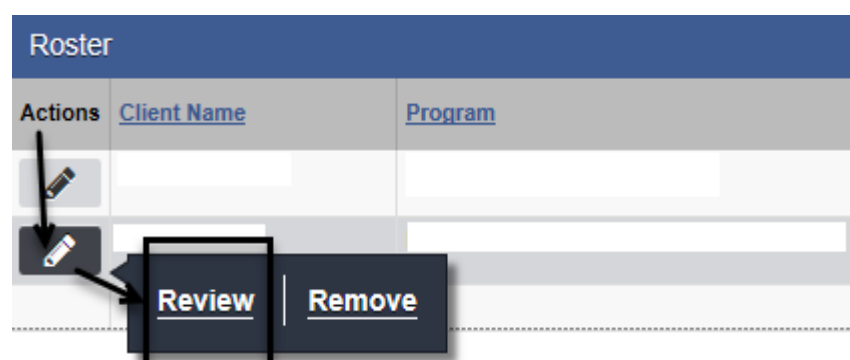


Updating a Client Status

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



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

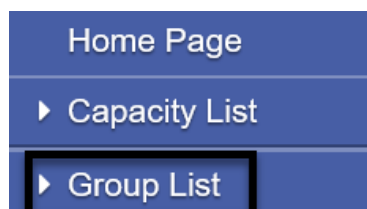


Change the status by clicking on the dropdown menu. Complete the status effective date and reason fields. Click **Save** and **Finish**.

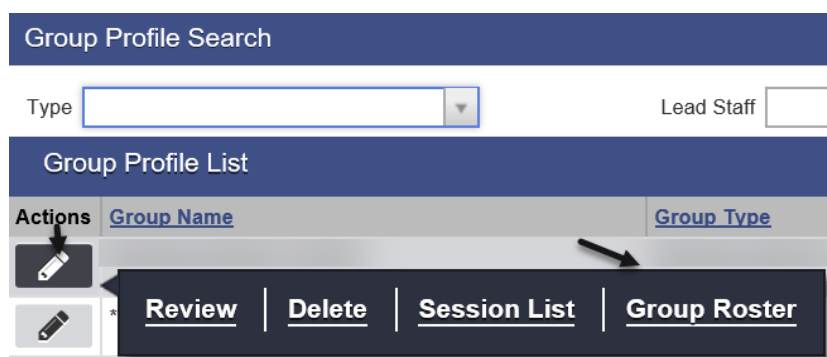


If the group profile window is not open and you want to update the status of a client member from the navigation pane:

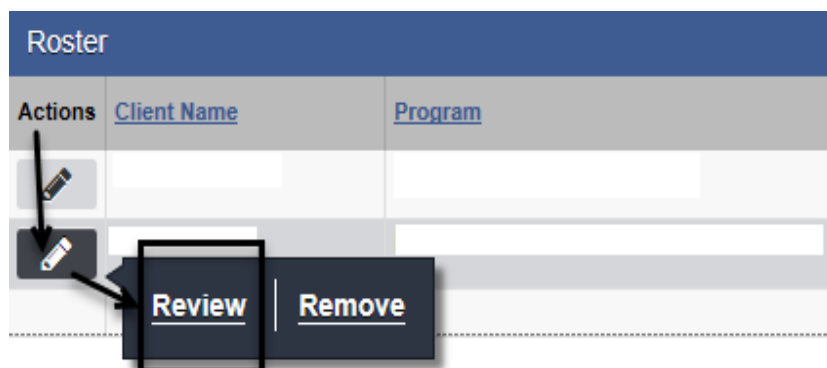
Click **Group List**.



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**.



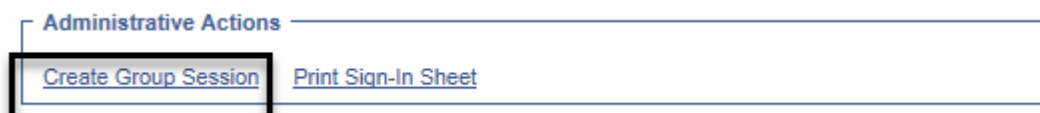


GROUP BULK ENCOUNTERS

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 at least one (1) of the clients is Medi-Cal eligible.

Start Date: Enter the date of the group session.

Billable: Select Yes

Calculate ODS Units: NO will automatically populate and will be read only with CalAIM Payment Reform for services provided after 07/01/23. For any services provided prior to 7/1/23 YES should be selected.

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.

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: The service should be selected depending on the Rendering Staff's Discipline, Modality and Service Type.

For training purposes select the following:

For OS, IOS, OTP, select: **#ODS Clinical Group_MFT**

For Recovery Services, select **#Recovery Service Group_LP**

Note: The Note field is required to save and create the group session notes. **Enter** the type of the Group Name.

Click **Save**.

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 dropdown menu
3. Click **Perform Action**

The screenshot shows the 'Group Session Notes' interface. At the top, there is a 'Note' field containing 'ODS Group'. Below it is the 'Administrative Actions' section with 'Cancel', 'Save', and 'Finish' buttons. The main section is titled 'Attendees' and contains a table with columns: 'Actions', 'Individual Note', 'Misc. Notes', 'Encounter', 'Client Name', and 'Status'. The 'Client Name' column has a dropdown menu open, showing options: 'Mark as Present', 'Mark as No Show', 'Mark as Excused', 'Create Encounter', and 'Clear Errors'. The 'Perform Action' button is highlighted with a red box and a number '3'. The 'Save' button is highlighted with a green box and a number '2'. The 'Mark as Present' option in the dropdown menu is highlighted with a black box and a number '1'. Arrows point from the numbers 1, 2, and 3 to their respective elements in the interface.

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

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



# Attnd	Status
1	Present
1	Present

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

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

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

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
		Create	View	←	



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

Rendering Staff: The Rendering Staff field is prepopulated from the Group Session note from the Lead Staff field and should show the name of the counselor who rendered the service. The rendering staff must have a valid National Provider Identifier (NPI). The selection of the Rendering Staff influences what values are available in the Service field.

Encounter

Rendering Staff

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

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

Billable

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

Medi-Cal Billable:



Travel Duration: This field is optional and prepopulated from the Group Session Notes as read only. Should not be included in the total service time. *OTP is not able to claim documentation duration.*

Documentation Duration: This field is optional and prepopulated with **0**. Outpatient programs should modify this field for each individual client. Should not be included in the total service time. *OTP is not able to claim documentation duration.*

Total Service Time: This field is required and will be populated from the Group Session Notes, should be modified if the client came in late or left early. This field should reflect the exact direct/session time with the client. Travel and/or documentation time should not be included in the total service time.

The screenshot shows a form with several duration fields. 'Service Location' is a dropdown menu. 'Start Time' and 'End Time' are text input fields. 'Travel Duration' and 'Documentation Duration' are text input fields followed by a 'Min' dropdown. 'Total Service Time' is a text input field followed by a 'Min' dropdown, and this entire field is highlighted with a red rectangular border.

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

The screenshot shows a dropdown menu labeled 'Contact Type' with 'Telehealth' selected and highlighted in yellow.

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.

The screenshot shows a dropdown menu labeled 'Pregnant/Postpartum' with a yellow highlight on the dropdown arrow.

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.



Outpatient/OTP Encounters and Group Modules Training

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. At least one Evidence Based Practice should be selected.

Which Evidence-Based Practices were used?

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

Diagnoses for this Service: The diagnosis field is editable and is required to release to billing. The active Primary Diagnosis will auto-populate when start date is entered. Field will remain editable. The choices will populate from any currently active diagnoses that have been entered via the Diagnosis List. Effective February 1, 2020, a diagnosis with DSM-5 Descriptor should be used.

Diagnoses for this Service	
Primary	<input type="text" value="F12.10-Cannabis use disorder, Mild(DSM 5)"/>
Secondary	<input type="text"/>
Tertiary	<input type="text"/>

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

<input type="button" value="Save"/>	<input type="button" value="Finish"/>
-------------------------------------	---------------------------------------

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



CREATING ENCOUNTERS FOR NO SHOWS

It is required to create encounters for group members who were scheduled to attend the group session but were **No Show**.

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	# Attnd	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.

Disallowed: If a service needs to be disallowed enter Yes.

Disallowance Reason: Select the reason that applies to the scenario.



There are different scenarios for Disallowed Services.

Option 1 - Encounter has not been released

Edit Encounter:

- 7) Note Type = Non-Billable
- 8) Billable = No
- 9) Disallowed = Yes
- 10) Disallowance Reason = Select appropriate reason from drop down menu
- 11) Medi-Cal Billable = No
- 12) Finalize Encounter

Option 2 - Encounter has been released, but not batched

Reject Claim and Edit Encounter:

- 4) In the Claim Item List, select 'Reject (Back Out)'
- 5) All encounter fields become editable
- 6) Follow steps in Option 1

Option 3 - Encounter has been released, batched, and submitted to the clearing house, but not billed

Contact Billing Unit and Edit Encounter:

- 4) Contact the Billing Unit for assistance with backing out the disallowed claim.
 - a. Billing Unit will reject the batch.
- 5) Encounter will be read only except for two fields: 'Disallowed' and 'Disallowance Reason'
- 6) Edit the two fields:
 - a. Disallowed = Yes
 - b. Disallowance Reason = Select appropriate reason from drop down menu

Option 4 - Encounter has been released, batched, and billed

Complete Payment Recovery Process and Edit Encounter:

- 4) Follow the steps to complete the Payment Recovery Process, as noted in the Billing Manual
- 5) Encounter will be read only except for two fields: 'Disallowed' and 'Disallowance Reason'
- 6) Edit the two fields:



Outpatient/OTP Encounters and Group Modules Training

- Disallowed = Yes
- Disallowance Reason = Select appropriate reason from drop down menu

Encounter 1 of 6

Rendering Staff: LPHA 20.7, Lourdes, MFT

Note Type: Non Billable

ENC ID: 548430

Group Session ID: 102333

Program Name: Outpatient/ODS OS : 5/1/2023 -

Service: MFT_AOD services; group counseling by a clinician, 15 minutes OS_MFT

Billable: No

Disallowed: No

Start Date: 5/17/2023

End Date:

Service Location: Non-residential Substance Abuse TX Facility

Start Time:

End Time:

Group Session Travel Duration:

Documentation Duration:

Total Service Time:

Contact Type: No Show

Emergency:

of Service Units/Sessions:

Visit Type: GP-Group

Medi-Cal Billable:

Pregnant/Postpartum:

Was an interpreter used?:

In what language was the service provided?:

Which Evidence-Based Practices were used?

Evidence-Based Practices:

None

Motivational Interviewing

Relapse Prevention

Other

Used Evidence-Based Practices:

Diagnoses for this Service:

Primary: F10.20-Alcohol use disorder, Severe(DSM 5)

Secondary:

Tertiary:

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

Rendering Staff: The Rendering Staff field is prepopulated from the Group Session note from the Lead Staff field and should show the name of the counselor who rendered the service. The rendering staff must have a valid National Provider Identifier (NPI). The selection of the Rendering Staff influences what values are available in the Service field.

Note Type: Select Non Billable.

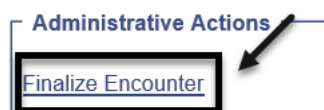


Billable: The Billable field prepopulated with Yes

Contact Type: Select No Show. When No Show is selected the Billable field will automatically update to No and it will become read only.

Visit Type: Select GP-Group for clinical group.

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**.

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**.

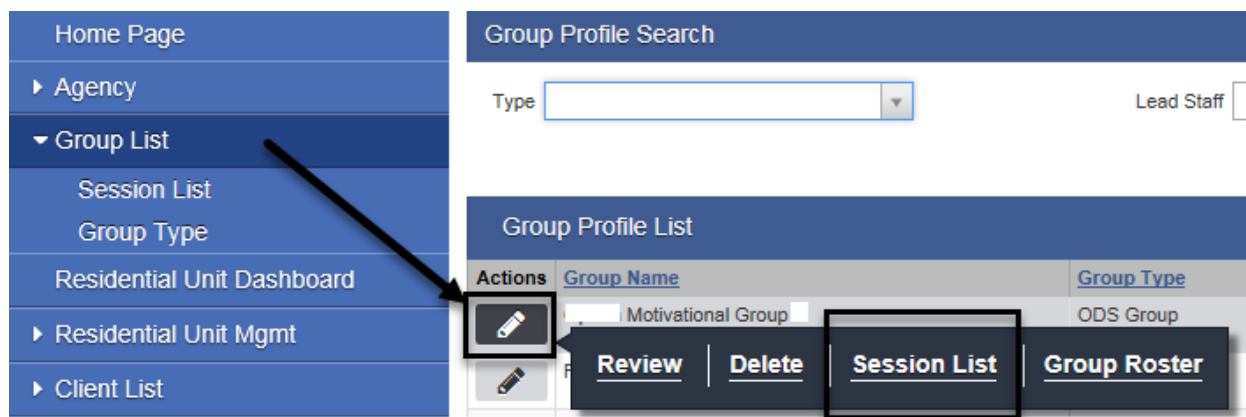
Click **Finish**.



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

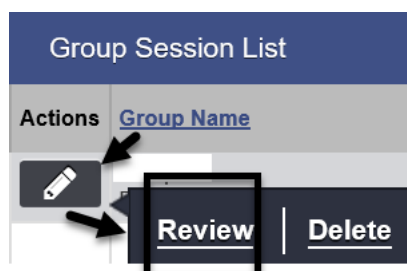
The encounter for the new member who joined the group session should be added via the group module. To create an encounter for the new client, from the navigation pane:

Click Group List → Actions → Session List





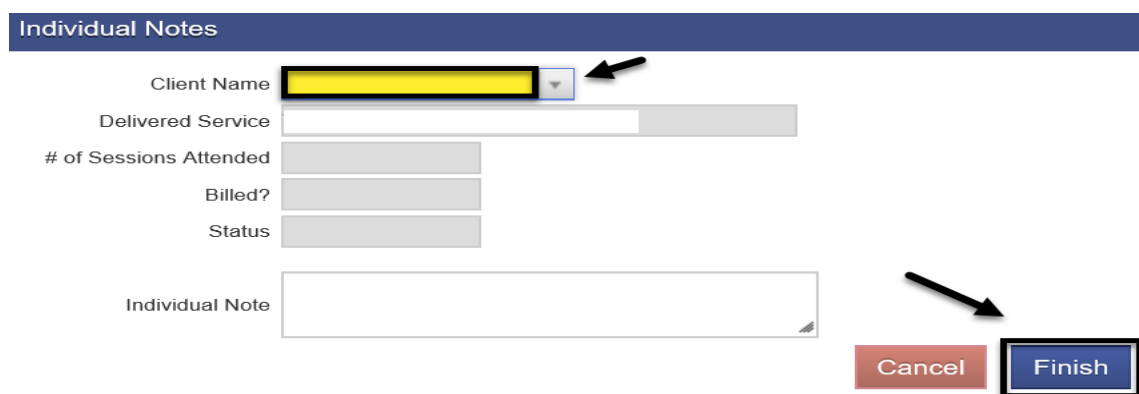
At the Group Session List, hover over the pen in Actions, and click **Review**.



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	
		Create	View	<input type="checkbox"/>	Q...	1	Present	
		Create	View	<input type="checkbox"/>	Q...	1	Present	
		Create	View	<input type="checkbox"/>	Q...		Present	
		Create	View	<input checked="" type="checkbox"/>	Q...	1	Present	

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

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"/>	
	Create	<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.



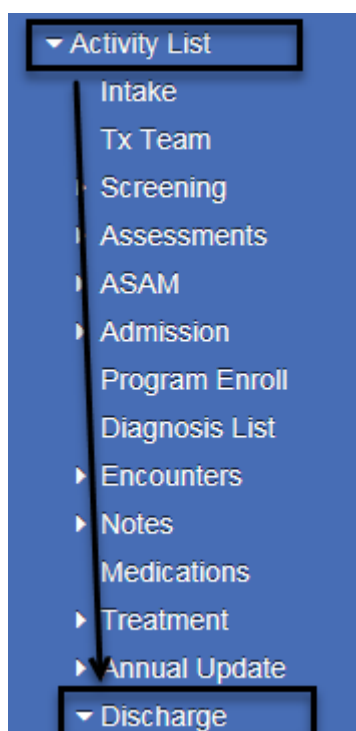
DISCHARGE



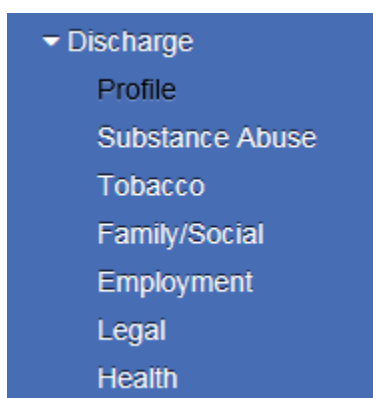
Note: A program enrollment **must** be ended prior to completing a client discharge.

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



Most of the screens are the same as the admission and annual update screens.





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

Discharge Profile

Discharge Date

Admission Date

Discharge Status

Ancillary Services Referral

Ancillary Services

0-None/No Other

1-Education/Literacy

2-Mental Health

3-Medical

>

<

Selected Ancillary Services

Record Status

Record Created By

Created Date

Last Updated By

Last Updated Date

CalOMS Form Serial #

Last Upload to State Date

[Mark as Deleted](#)

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 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.

Home Page
▸ Agency
▸ Group List
Residential Unit Dashboard
▸ Residential Unit Mgmt
▸ Client List
▸ System Administration
Reports

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	
Waiting 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.

