SMART Tip Sheets
Encounters

Encounters

- Billable Notes
- Miscellaneous Notes
- Encounter Reports

This tip sheet outlines the procedures to document treatment encounters, ancillary services provided by the treatment provider, progress notes and miscellaneous notes rendered by providers.

Total Pages: 5

IGSR Technical Support: 301.405.4870 Updated: March 2012

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Encounters

Background: This module allows you to document client encounters and associated notes.

1. **Entry Steps:** Client List, select client, ADAA Admission/Enrollment, Activity List.

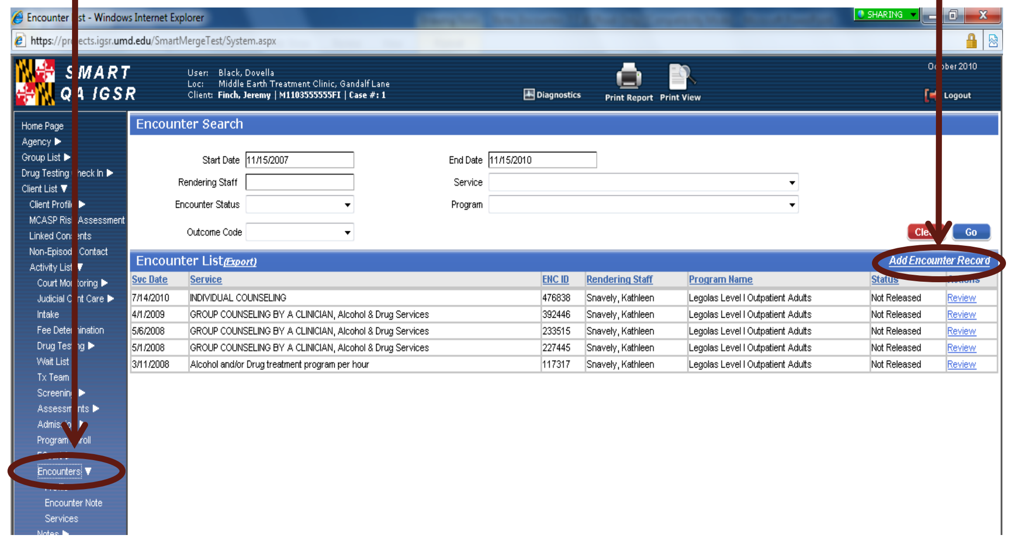
2. **Encounters:** To enter an encounter for a client (e.g. individual counseling, etc.). Click **Encounters** from the left menu bar, click the **Add Encounter Record**. ***Note:*** Click on **Review** in the Actions Column to review prior entries.

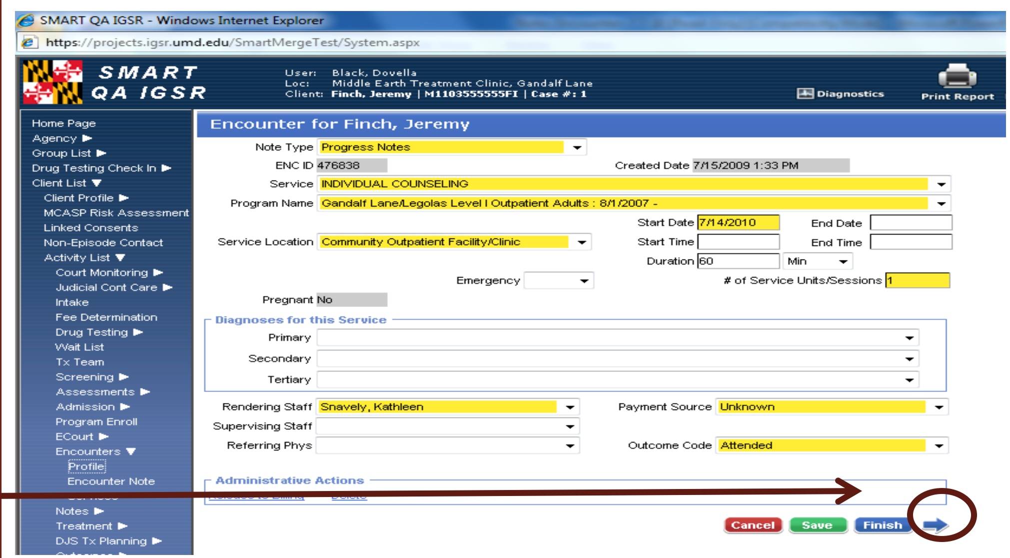
3. Complete at all required system and agency fields. Note: If the client is a drug court client please enter the Outcome to ensure that it appears on the Client Progress Report.

4. Click ➔ to advance to the next screen.

To access the Encounters module, click **Encounters** from the Left Menu bar

Click **Add Encounter Record** to enter a new Encounter





Click ➔ to advance to the next screen

Encounters - Notes

Background: This module allows you to document client encounters and associated notes for services rendered.

1. **Associated Goals & Objectives:** If the client has a Treatment Plan in SMART, the associated goals and objectives that were addressed in each particular session by clicking **Add Goal** or **Add Objective** and selecting the appropriate ones.

2. **Signed/Unsigned Notes:** This screen contains a Signed/Unsigned note function. To make an editable note, enter your note in the **Unsigned Note** field and click **Save** or **Finish**. However, to electronically sign the note (thereby making it uneditable), enter the note in the **Unsigned Note** box and then click **Sign Note**. ***Note:*** If the signed note contained erroneous information or if you need to enter more data, simply enter the new information in the **Unsigned Note** box and click **Sign Note** again.

3. **Release these Notes:** Release these Notes defaults to 'No", meaning that the note will not be consented even if the encounter is module is consented to another agency. By selecting 'Yes', if encounters are shared through the consent process, this note will also be included .

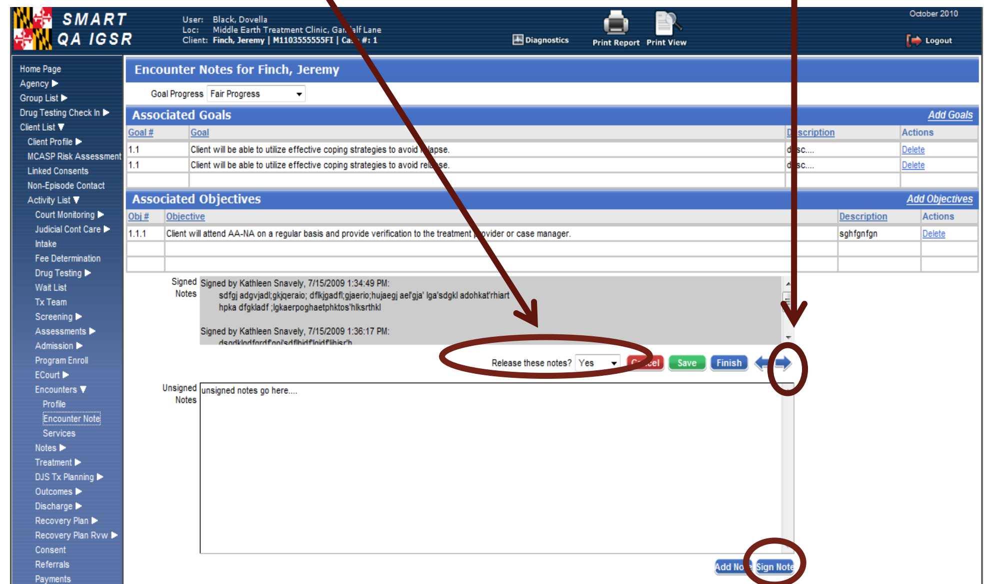
4. Click ➔ to advance to the Ancillary Services Screen.

5. Click **Save** or **Finish** after completing the last screen.

6. To print a list of Encounters for this client, including the notes, click **Print Report** and a report will generate.

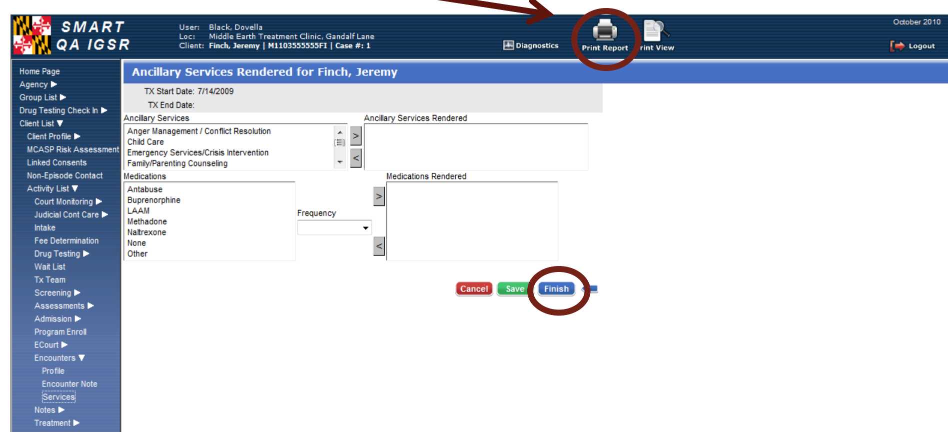
If you would like to share this note with another agency, select **Yes** to release these notes.

When finished, click ➔ to advance to the next screen.



To sign a note, click **Sign Note.**

To print a report of encounters, click **Print Report**.



Miscellaneous Notes

Background: This module documents Miscellanesous Notes (e.g. phone calls, emails, crisis, etc.)

1. **Entry Steps:** Login, Select Facility, Client List, select client, Activity List.

2. From the Activity List, click **Notes**, then click **Add New Misc. Note.** Complete all system and agency required fields.

3. **Signed/Unsigned Notes:** This screen contains a Signed/ Unsigned note function. To make an editable note, enter your note in the **Unsigned Note** field and click **Save** or **Finish**. However, to electronically sign the note (thereby making it uneditable), enter the note in the **Unsigned Note** box and then click **Sign Note**. ***Note:*** If the signed note contained erroneous information or if you need to enter more data, simply enter the new information in the **Unsigned Note** box and click **Sign Note** again.

4. **Release these Notes*:*** Release these Notes defaults to ‘No”, meaning that the note will not be consented even if the encounter is module is consented to another agency. By selecting ‘Yes’, if encounters are shared through the consent process, this note will also be included .

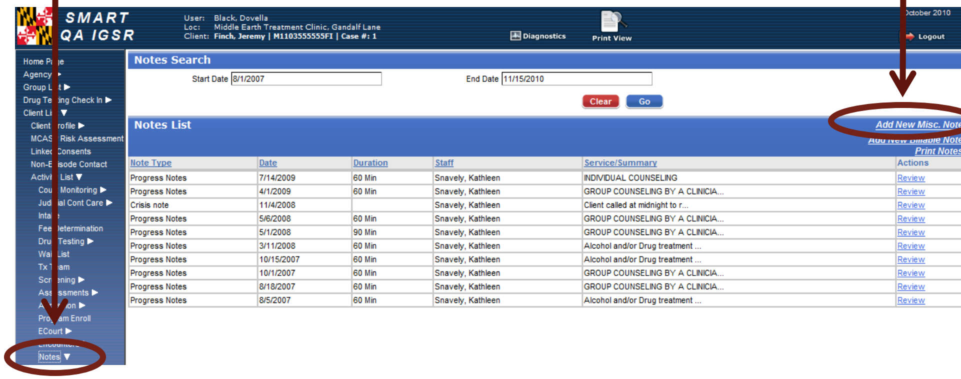
5. Click on **Save** or **Finish**.

   ***Helpful Hint*: A.** Use the Alert feature by clicking the **Alert** hyperlink to indicate if the client requires immediate follow-up. The client’s name will appear in Red on the Client List if the Alert feature is used. **B**. The Miscellaneous Notes screen becomes non-editable once you click **Save** or **Finish**.

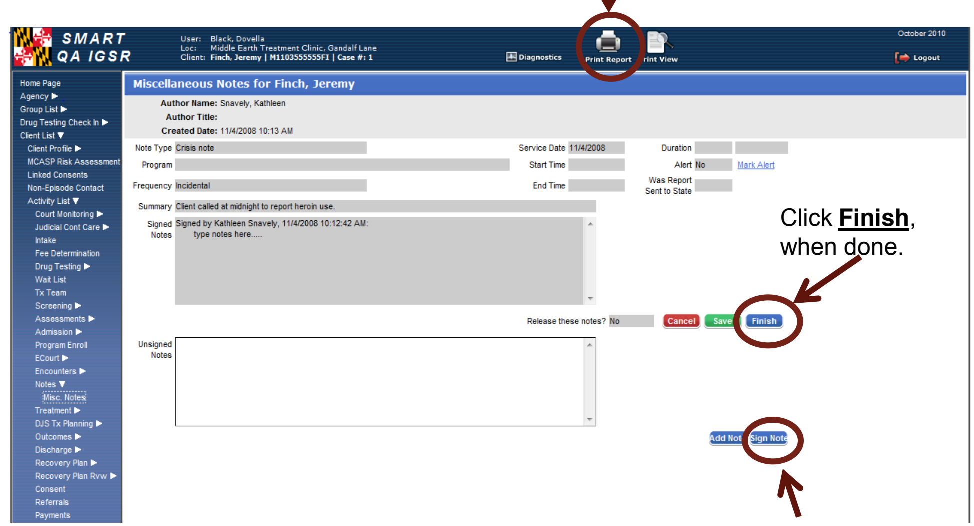
6. **Miscellaneous Notes Report:** After clicking **Save** and while you are still within the encounter record, single-click the **Print Report** icon to generate a report of the listed notes for this particular client.

To access Miscellaneous Notes, click **Notes**

To enter a new Miscellaneous Note, click **Add New Misc. Note**



To print a report of the Miscellaneous Notes for this client, click **Print Report**



Click **Finish**, when done.

Click **Sign Notes** to sign your notes.

Print Notes

Background: This function allows you to generate all notes for a particular client, including the Encounters and the Miscellaneous Notes.

1. **Print All Notes**: From the Left Menu Bar, click **Notes** on to pull up the Notes List screen. This generates both the Encounters and the Miscellaneous Notes.
2. Click **Print Notes** at the top right.
3. Enter the desired date range (e.g. 1/1/09:2/1/09) in the Note Date field, and click **Go**.
4. Click **Export** to export your data in MS Excel, where the data can be saved to a local machine and reports and queries can be written .

   Note: Please be sure that when exporting client information that all efforts are made to adhere to Title 42 Code of Federal Regulations and HIPAA.
5. Click **Finish** to return to the Notes List screen.

Click **Print Notes** to print all notes for this client, Encounters and Miscellaneous Notes.