

# SMART Tip Sheets Encounters

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## 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.

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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

Encounter Search

Start Date: 11/15/2007 End Date: 11/15/2010

Rendering Staff: Encounter Status: Outcome Code:

Program:

Go

Encounter ID	Service	Rendering Staff	Program Name	Status	Actions
476838	INDIVIDUAL COUNSELING	Snaveley, Kathleen	Legolas Level I Outpatient Adults	Not Released	Review
392446	GROUP COUNSELING BY A CLINICIAN, Alcohol & Drug Services	Snaveley, Kathleen	Legolas Level I Outpatient Adults	Not Released	Review
233515	GROUP COUNSELING BY A CLINICIAN, Alcohol & Drug Services	Snaveley, Kathleen	Legolas Level I Outpatient Adults	Not Released	Review
227445	GROUP COUNSELING BY A CLINICIAN, Alcohol & Drug Services	Snaveley, Kathleen	Legolas Level I Outpatient Adults	Not Released	Review
117317	Alcohol and/or Drug treatment program per hour	Snaveley, Kathleen	Legolas Level I Outpatient Adults	Not Released	Review

**Add Encounter Record**

Encounter for Finch, Jeremy

Note Type: Progress Notes

ENC ID: 476838

Service: INDIVIDUAL COUNSELING

Program Name: Gandalf Lane/Legolas Level I Outpatient Adults : 8/1/2007 -

Service Location: Community Outpatient Facility/Clinic

Pregnant No:

Emergency:

# of Service Units/Sessions: 1

Diagnoses for this Service:

Primary:

Secondary:

Tertiary:

Rendering Staff: Snaveley, Kathleen

Supervising Staff:

Referring Phys:

Payment Source: Unknown

Outcome Code: Attended

Administrative Actions:

Cancel Save Finish


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.

SMART QA IGSR

User: Black, David | Middle Bath Treatment Clinic, Galt Hall Lane  
 Loc: Finch, Jeremy | M110355555F1 | Case #: 1

Diagnosics Print Report Print View Logout

Home Page  
 Agency  
 Group List  
 Drug Testing Check In  
 Client List  
 Client Profile  
 MCASP Risk Assessment  
 Linked Consents  
 Non-Episode Contact  
 Activity List  
 Court Monitoring  
 Judicial Court Care  
 Intake  
 Fee Determination  
 Drug Testing  
 Wait List  
 Tx Team  
 Screening  
 Assessments  
 Admission  
 Program Enroll  
 ECourt  
 Encounters  
 Profile  
 Encounter Note  
 Services  
 Notes  
 Treatment  
 DJJ Tx Planning  
 Outcomes  
 Discharge  
 Recovery Plan  
 Recovery Plan Rvw  
 Consent  
 Referrals  
 Payments

Encounter Notes for Finch, Jeremy

Goal Progress Fair Progress

Associated Goals

Goal #	Goal	Description	Actions
1.1	Client will be able to utilize effective coping strategies to avoid relapse.		Delete
1.1	Client will be able to utilize effective coping strategies to avoid relapse.		Delete

Associated Objectives

Obj #	Objective	Description	Actions
1.1.1	Client will attend AA-NA on a regular basis and provide verification to the treatment provider or case manager.		Delete

Signed Notes

Signed by Kathleen Snavely, 7/15/2009 1:34:49 PM:  
 sdfsdf adgvdff,gljgserao; dfjgadf,glsero,hujagj aef'gla lga'sdgl adohkar'riant  
 hpsa dfgkjadf lglaserpghaetphktoishkarhiki

Signed by Kathleen Snavely, 7/15/2009 1:36:17 PM:  
 hpsa dfgkjadf lglaserpghaetphktoishkarhiki

Release these notes? Yes Cancel Save Finish

Unsigned Notes

Unsigned notes go here...

Sign Note

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

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

User: Black, Dovella  
 Loc: Middle Earth Treatment Clinic, Gangall Lane  
 Client: Finch, Jeremy | M11035555SF1 | Case #: 1

October 2010

[Home Page](#)  
[Agency](#)  
[Group List](#)  
[Drug Testing Check In](#)  
[Client List](#)  
[Client Profile](#)  
[WCAASP Risk Assessment](#)  
[Linked Consents](#)  
[Non-Episode Contact](#)  
[Activity List](#)  
[Court Monitoring](#)  
[Judicial Court Care](#)  
[Intake](#)  
[Fee Determination](#)  
[Drug Testing](#)  
[Wait List](#)  
[Tx Team](#)  
[Screening](#)  
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Diagnostics

Print Report

Print View

Logout

### Ancillary Services Rendered for Finch, Jeremy

TX Start Date: 7/14/2009

TX End Date:

Ancillary Services

Anger Management / Conflict Resolution  
 Child Care  
 Emergency Services/Crisis Intervention  
 Family/Parenting Counseling  
 Medications

Ancillary Services Rendered

(B)   
 (A)

Medications

Antabuse  
 Buprenorphine  
 LAAM  
 Methadone  
 Naltrexone  
 None  
 Other

Medications Rendered

Frequency

## Miscellaneous Notes

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

- Entry Steps:** Login, Select Facility, Client List, select client, Activity List.
- From the Activity List, click **Notes**, then click **Add New Misc. Note**. Complete all system and agency required fields.
- 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.
- 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.
- 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**.
- 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**

SMART QA IGSR

User: Black, Dorella  
Loc: Middle Earth Treatment Clinic, Gandalf Lane  
Client: Finch, Jeremy | M1103555555 | Case #: 1

Notes Search  
Start Date: 5/1/2007 End Date: 11/15/2010  
Clear Go

Notes List

Note Type	Date	Duration	Staff	Service/Summary	Actions
Progress Notes	7/14/2009	60 Min	Snaveley, Kathleen	INDIVIDUAL COUNSELING	Review
Progress Notes	4/1/2009	60 Min	Snaveley, Kathleen	GROUP COUNSELING BY A CLINICIA...	Review
Crisis note	11/4/2008		Snaveley, Kathleen	Client called at midnight to r...	Review
Progress Notes	5/6/2008	60 Min	Snaveley, Kathleen	GROUP COUNSELING BY A CLINICIA...	Review
Progress Notes	5/1/2008	90 Min	Snaveley, Kathleen	GROUP COUNSELING BY A CLINICIA...	Review
Progress Notes	3/1/2008	60 Min	Snaveley, Kathleen	Alcohol and/or Drug treatment ...	Review
Progress Notes	10/15/2007	60 Min	Snaveley, Kathleen	Alcohol and/or Drug treatment ...	Review
Progress Notes	10/1/2007	60 Min	Snaveley, Kathleen	GROUP COUNSELING BY A CLINICIA...	Review
Progress Notes	8/18/2007	60 Min	Snaveley, Kathleen	GROUP COUNSELING BY A CLINICIA...	Review
Progress Notes	8/5/2007	60 Min	Snaveley, Kathleen	Alcohol and/or Drug treatment ...	Review

Add New Misc. Note

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**

SMART QA IGSR

User: Black, Dorella  
Loc: Middle Earth Treatment Clinic, Gandalf Lane  
Client: Finch, Jeremy | M1103555555 | Case #: 1

Miscellaneous Notes for Finch, Jeremy

Author Name: Snaveley, Kathleen  
Author Title:  
Created Date: 11/4/2008 10:13 AM

Note Type: Crisis note Service Date: 11/4/2008 Duration: Alert No: Mark Alert

Program: Start Time: End Time: Was Report Sent to State:

Frequency: Incidental

Summary: Client called at midnight to report heroin use.

Signed: Signed by Kathleen Snaveley, 11/4/2008 10:12:42 AM:  
Notes: type notes here...

Unsigned Notes:

Release these notes? No Cancel Save Finish

Add New Sign Note

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 .
5. Click **Finish** to return to the Notes List screen.

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.

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

The screenshots show the SMART QA IGRS interface. The top screenshot shows the 'Notes List' screen with a date range of 9/1/2007 to 11/15/2010. The middle screenshot shows the 'Enter range of dates for notes' screen with the date range 1/1/2008:11/15/2010 entered. The bottom screenshot shows the 'Client Treatment Notes' screen with the date range 1/1/2008:11/15/2010 entered.

**Notes List**

Note Type	Date	Duration	Staff	Service/Summary	Review
Progress Notes	7/14/2009	60 Min	Snavey, Kathleen	INDIVIDUAL COUNSELING	<a href="#">Review</a>
Progress Notes	4/1/2009	60 Min	Snavey, Kathleen	GROUP COUNSELING BY A CLINICIAN...	<a href="#">Review</a>
Crisis note	11/4/2008		Snavey, Kathleen	Client called at midnight to...	<a href="#">Review</a>
Progress Notes	5/6/2008	60 Min	Snavey, Kathleen	GROUP COUNSELING BY A CLINICIAN...	<a href="#">Review</a>
Progress Notes	5/1/2008	90 Min	Snavey, Kathleen	GROUP COUNSELING BY A CLINICIAN...	<a href="#">Review</a>
Progress Notes	3/11/2008	60 Min	Snavey, Kathleen	Alcohol and/or Drug treatment...	<a href="#">Review</a>
Progress Notes	10/15/2007	60 Min	Snavey, Kathleen	Alcohol and/or Drug treatment...	<a href="#">Review</a>
Progress Notes	10/1/2007	60 Min	Snavey, Kathleen	GROUP COUNSELING BY A CLINICIAN...	<a href="#">Review</a>
Progress Notes	8/18/2007	60 Min	Snavey, Kathleen	GROUP COUNSELING BY A CLINICIAN...	<a href="#">Review</a>
Progress Notes	8/5/2007	60 Min	Snavey, Kathleen	Alcohol and/or Drug treatment...	<a href="#">Review</a>

**Enter range of dates for notes (<Begin Date>:<End Date>)**

Note Date: 1/1/2008:11/15/2010

Can't **Go**

**Client Treatment Notes**

Report Criteria  
Note Date: 1/1/2008:11/15/2010

Date	Staff	Client	Type	Program	Start Time	End Time	Summary	Signed Note
7/14/2009	Snavey, Kathleen	Finch, Jeremy	Progress Notes	Legolas Level I Outpatient Adults	12:00 AM	12:00 AM	INDIVIDUAL COUNSELING	Signed by Kathleen Snavey, 7/15/2009 1:34:49 PM: wftg adpjadk piperaw: dRlgaftt gperio hupagj aefgla 'ga'adgkl adohkahtart hpsa d'fkiadef: 'lpaerpoqhaephotos'hkartihi
4/1/2009	Snavey, Kathleen	Finch, Jeremy	Progress Notes	Legolas Level I Outpatient Adults	12:00 AM	12:00 AM	GROUP COUNSELING BY A CLINICIAN, Alcohol & Drug Services	Signed by Kathleen Snavey, 7/15/2009 1:36:17 PM: dsqklgfdgrfgojdsdflgdfgfhjwch
11/4/2008	Snavey, Kathleen	Finch, Jeremy	Crisis note				Client called at midnight to report heroin use.	Signed by Kathleen Snavey, 7/15/2009 1:37:48 PM: Entered by Kathleen Snavey, 7/15/2009 1:37:44 PM: adgdnhrfng
5/6/2008	Snavey, Kathleen	Finch, Jeremy	Progress Notes	Legolas Level I Outpatient Adults	6:00 PM	6:00 PM	GROUP COUNSELING BY A CLINICIAN, Alcohol & Drug Services	Signed by Kathleen Snavey, 6/25/2009 9:33:25 AM: notes can be typed here.
5/1/2008	Snavey, Kathleen	Finch, Jeremy	Progress Notes	Legolas Level I Outpatient Adults	6:00 PM	7:30 AM	GROUP COUNSELING BY A CLINICIAN, Alcohol & Drug Services	Signed by Kathleen Snavey, 10/27/2008 1:51:31 PM: Entered by: Snavey, Kathleen on 10/6/2008 11:04 AM The Kathleen's Adult Aftercare Group, an After Care Group group, met on 5/6/2008 at 8:00 PM. Facilitated by: 161, Training, and discussed the following: this is the group note that will be applied to all clients' records.
3/11/2008	Snavey, Kathleen	Finch, Jeremy	Progress Notes	Legolas Level I Outpatient Adults	12:00 AM	12:00 AM	Alcohol and/or Drug treatment program per hour	