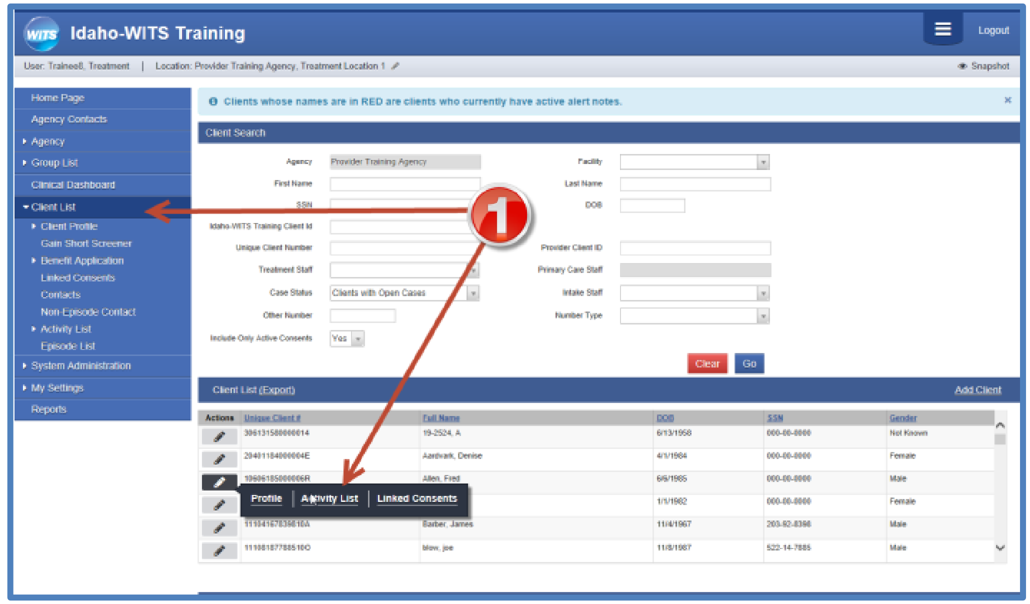
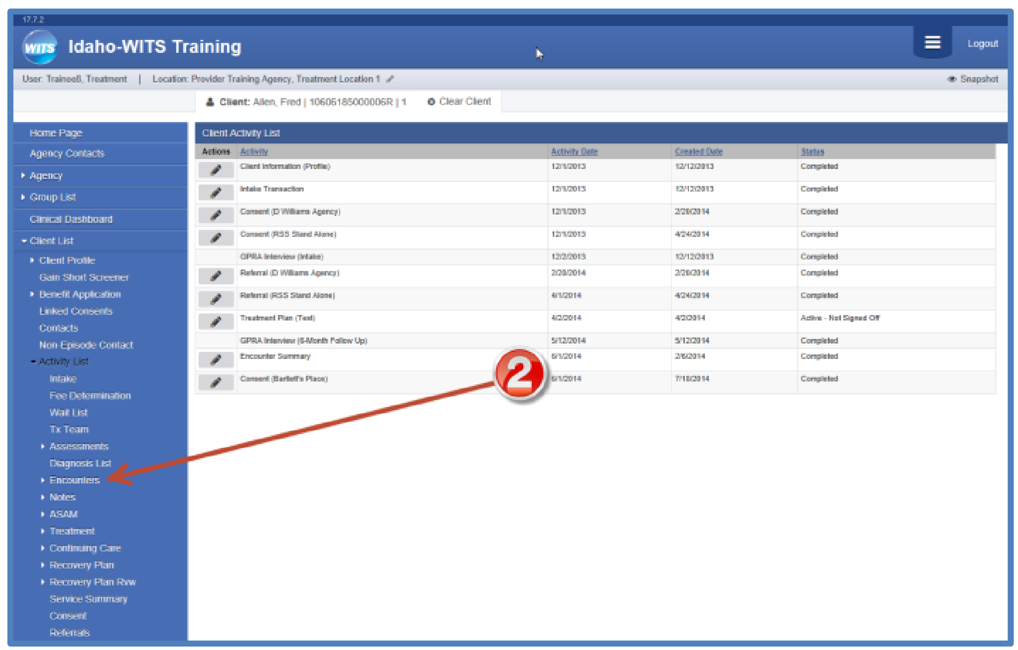
Creating an Encounter for Private/Self Pay Clients

1. **Getting here:** Login, select the **Facility**, select **Client List** on the Navigation Pane (left menu), and search for your client. Select **Activity List**.

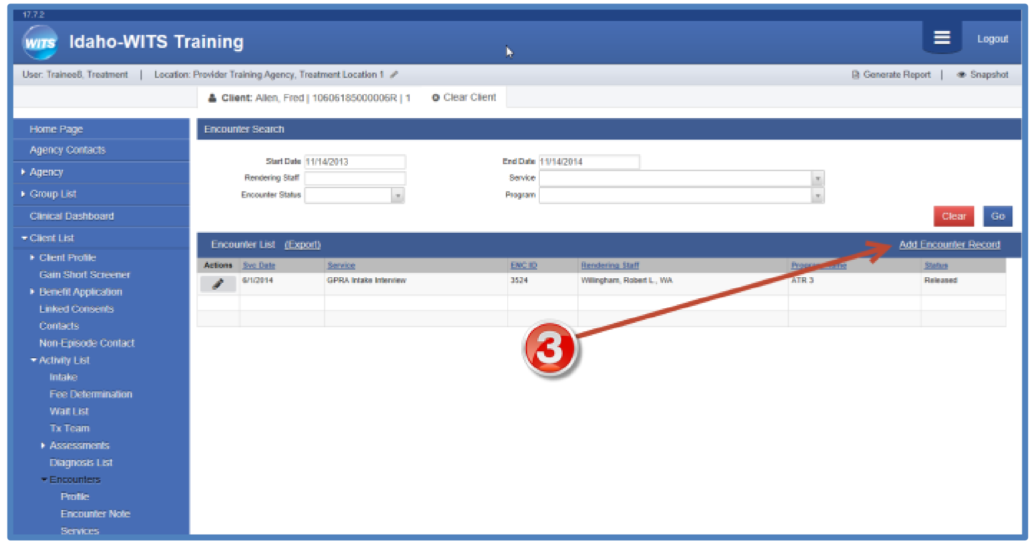
2. Click **Encounters** on the Navigation Pane.





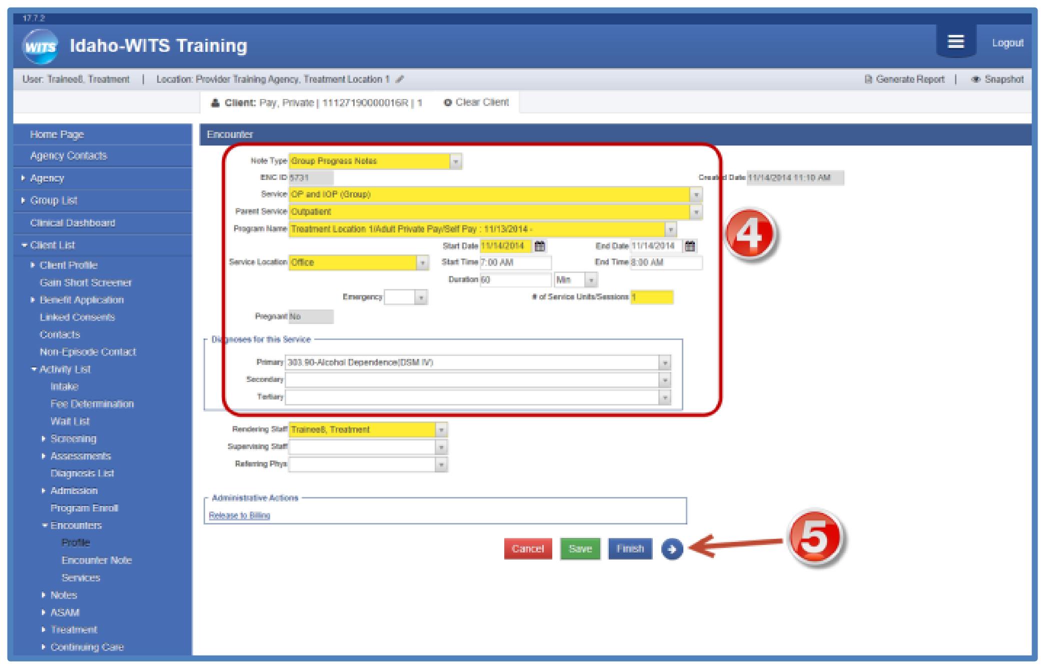
3. Click **Add Encounter Record**.

NOTE: The rate must be entered in WITS by the Agency WITS Administrator (AWA) to be available on the Service field on the Encounter.



4. Complete all required fields being careful to select the correct **Service**. Select the Program Name of **Adult Private Pay/Self Pay or Adolescent Private Pay/Self Pay**. Select the **Primary** diagnosis.

NOTE: A Primary diagnosis must be entered to allow the CMS-1500 to print correctly.



5. Click the **Next Arrow**.

6. Enter a note in the **<u>Unsigned Note</u>** box and click Sign Note

7. Click **<u>Save</u>**.

8. Click **<u>Release to Billing</u>**.

NOTE: If more than one Client Group Enrollment exists, select the correct self-pay or private pay entity expected to pay for the service.