

# 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.

Idaho-WITS Training

User: Trainee6, Treatment | Location: Provider Training Agency, Treatment Location 1

Client Search

Agency: Provider Training Agency | Facility: [Dropdown]

First Name: [Text] | Last Name: [Text]

SSN: [Text] | DOB: [Text]

Idaho-WITS Training Client Id: [Text]

Unique Client Number: [Text]

Treatment Staff: [Text]

Case Status: Clients with Open Cases | Intake Staff: [Text]

Other Number: [Text] | Number Type: [Text]

Include Only Active Consents: Yes

Clear Go

Client List (Export) Add Client

| Actions | Unique Client # | Full Name        | DOB       | DOB         | Gender    |
|---------|-----------------|------------------|-----------|-------------|-----------|
| [Icon]  | 30613150000014  | 19-2524, A       | 6/13/1956 | 000-00-0000 | Not Known |
| [Icon]  | 2948115400004E  | Aardvaak, Denise | 4/1/1984  | 000-00-0000 | Female    |
| [Icon]  | 1060610500006R  | Allen, Fred      | 6/5/1905  | 000-00-0000 | Male      |
| [Icon]  | 1118412133815A  | Barber, James    | 1/1/1962  | 000-00-0000 | Female    |
| [Icon]  | 11198197788516O | Blow, Joe        | 11/4/1967 | 203-82-8388 | Male      |
| [Icon]  |                 |                  | 11/8/1987 | 522-14-7985 | Male      |

Idaho-WITS Training

User: Trainee6, Treatment | Location: Provider Training Agency, Treatment Location 1

Client: Allen, Fred | 1060610500006R | 1 | Clear Client

Client Activity List

| Actions | Activity                           | Activity Date | Completed Date | Status                  |
|---------|------------------------------------|---------------|----------------|-------------------------|
| [Icon]  | Client Information (Profile)       | 12/1/2013     | 12/12/2013     | Completed               |
| [Icon]  | Intake Transaction                 | 12/1/2013     | 12/12/2013     | Completed               |
| [Icon]  | Consent (D Williams Agency)        | 12/1/2013     | 2/25/2014      | Completed               |
| [Icon]  | Consent (RSS Stand Alone)          | 12/1/2013     | 4/24/2014      | Completed               |
| [Icon]  | GPRA Interview (Intake)            | 12/2/2013     | 12/12/2013     | Completed               |
| [Icon]  | Referral (D Williams Agency)       | 2/28/2014     | 2/25/2014      | Completed               |
| [Icon]  | Referral (RSS Stand Alone)         | 4/1/2014      | 4/24/2014      | Completed               |
| [Icon]  | Treatment Plan (Text)              | 4/2/2014      | 4/2/2014       | Active - Not Signed Off |
| [Icon]  | GPRA Interview (3-Month Follow Up) | 5/13/2014     | 5/13/2014      | Completed               |
| [Icon]  | Encounter Summary                  | 6/1/2014      | 2/6/2014       | Completed               |
| [Icon]  | Consent (Barlett's Place)          | 6/1/2014      | 7/15/2014      | Completed               |

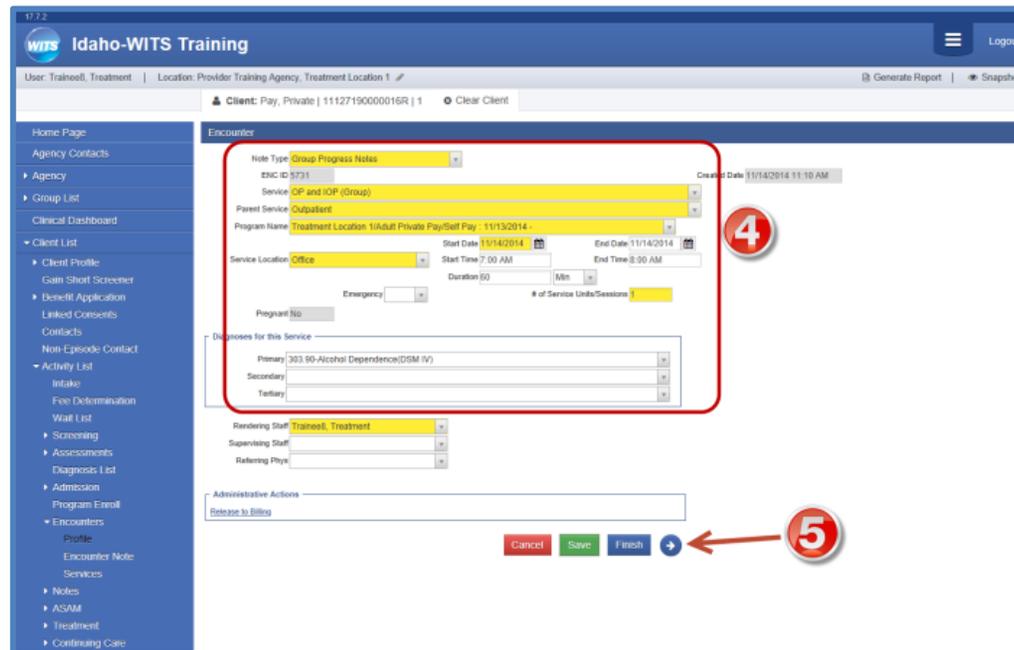
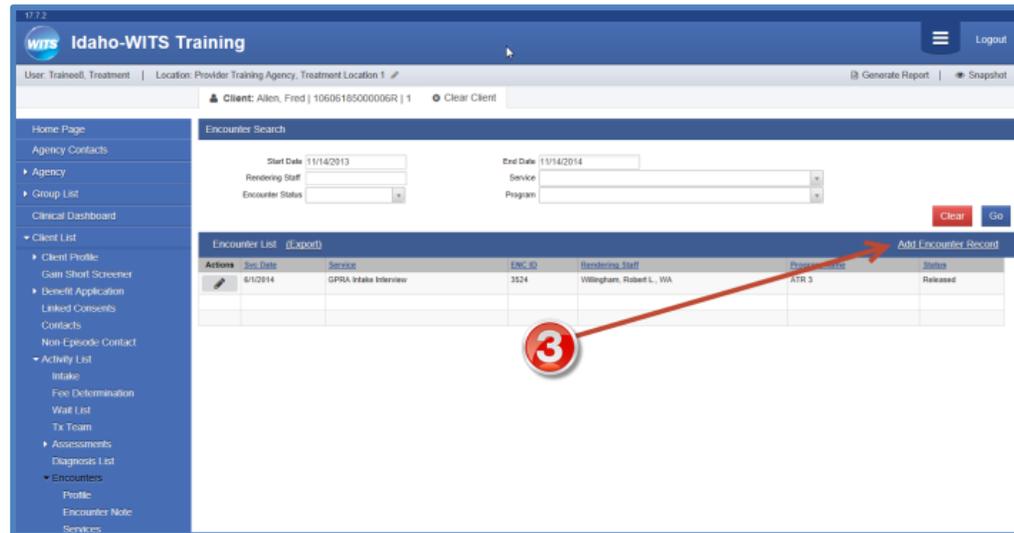
3. Click **Add Encounter Record**.

**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 **Unsigned Note** box and click **Sign Note**

7. Click **Save**.

8. Click **Release to Billing**.

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

