

Creating a 20-511a Pilot Miscellaneous Note



Miscellaneous Notes in WITS are considered a part of the client's official electronic health record (EHR.) It is your Regions responsibility to ensure a Miscellaneous Notes follows the standards set forth by the [DBH Policy eManual](#), the [BH Standards Manual](#), and the [Mental Health Court Standards and Guidelines](#).

1. Begin on the Client Activity List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	1/16/2018	1/16/2018	Completed
	Intake Transaction	1/16/2018	1/16/2018	Completed
	Client Program Enrollment (Pre-PCP)	1/16/2018	1/16/2018	Completed
	Miscellaneous Note Summary	1/16/2018	1/16/2018	Not Applicable
	Client Eligibility	1/16/2018	1/16/2018	Withdrawn
	Client Program Enrollment (PCP)	1/25/2018	1/25/2018	Completed

2. Once you're on the Activity List, click **Notes** on the blue navigation pane.

Notes Search

Start Date: 1/26/2017 End Date: 1/26/2018

Allow Disclosure of Note:

Notes List

Actions	Note Type	Date	Duration	Staff	Service/Summary
	Pre-PCP	1/16/2018	15 Min	Van Skike, Anna	asd

3. Click **Add New Misc. Note**

Miscellaneous Notes

Author Name: 18, Trainee
 Author Title:
 Created Date:

Note Type: Service Date:

Program: Start Time:

Frequency: End Time:

Summary:

Duration:

Alert:

Was Report Sent to State:

Signed Notes:

Unsigned Notes:

Release these notes?

4. Complete the following fields.

- Note Type –
 - If the action was completed by clinical staff select “Case Management Note”

- If the action was completed by a non-clinical staff select “Administrative Note”
- Program – select 20-511a Pilot
- Service – enter the date.
- Start Time – enter the start time as HH:MM.
- End Time – enter the end time as HH:MM.
- Summary – enter a summary of what you did on the case
- Release these notes? – the field will populate with No.

5. Enter notes in the Unsigned Note section.

6. When the notes are complete, click .

The screenshot shows a web form titled "Miscellaneous Notes". At the top, it displays "Author Name: Willingham, Robert L.", "Author Title:", and "Created Date:". Below this are several input fields: "Note Type" (set to "Progress Note"), "Service Date" (6/1/2018), "Duration" (15 Min), "Program" (Couer d'Alene/20-511a Pilot : 6/1/2018 -), "Start Time" (9:00 AM), "Alert" (No), "Mark Alert" (link), "Frequency", "End Time" (9:15 AM), and "Was Report Sent to State". A "Summary" field contains the text "enter a summary of what you did on the case". Below the summary is a "Signed Notes" section, which is currently empty. At the bottom, there is an "Unsigned Notes" section with a text area labeled "Enter notes here". To the right of the text area are buttons for "Cancel", "Save", "Finish", "Add Note", and "Sign Note". A red box highlights the "Unsigned Notes" text area and the "Sign Note" button. A red arrow points from the "Sign Note" button to the "Summary" field.

7. The Signed Note becomes read-only and an electronic signature and time stamp is created in the Signed Notes section.

8. Click  and  .

Creating a 20-511a Non-Pilot Assessment Miscellaneous Note



Miscellaneous Notes in WITS are considered a part of the client's official electronic health record (EHR.) It is your Regions responsibility to ensure a Miscellaneous Notes follows the standards set forth by the [DBH Policy eManual](#), the [BH Standards Manual](#), and the [Mental Health Court Standards and Guidelines](#).

1. Begin on the Client Activity List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	1/16/2018	1/16/2018	Completed
	Intake Transaction	1/16/2018	1/16/2018	Completed
	Client Program Enrollment (Pre-PCP)	1/16/2018	1/16/2018	Completed
	Miscellaneous Note Summary	1/16/2018	1/16/2018	Not Applicable
	Client Eligibility	1/16/2018	1/16/2018	Withdrawn
	Client Program Enrollment (PCP)	1/25/2018	1/25/2018	Completed

2. Once you're on the Activity List, click **Notes** on the blue navigation pane.

Notes Search

Start Date: 1/26/2017 End Date: 1/26/2018

Allow Disclosure of Note:

Notes List

Actions	Note Type	Date	Duration	Staff	Service Summary
	Pre-PCP	1/16/2018	15 Min	Van Skike, Anna	asd

3. Click **Add New Misc. Note**

Miscellaneous Notes

Author Name: 18, Trainee
 Author Title:
 Created Date:

Note Type Service Date

Program Start Time

Frequency End Time

Summary

Signed Notes

Unsigned Notes

Duration

Alert No [Mark Alert](#)

Was Report Sent to State

Release these notes? No

4. Complete the following fields.

- Note Type –
 - If the action was completed by clinical staff select “Case Management Note”
 - If the action was completed by a non-clinical staff select “Administrative Note”
- Program – select 20-511a Assessment
- Service – enter the date.
- Start Time – enter the start time as HH:MM.
- End Time – enter the end time as HH:MM.
- Summary – enter a summary of what you did on the case
- Release these notes? – the field will populate with No.

5. Enter notes in the Unsigned Note section.

6. When the notes are complete, click .

Miscellaneous Notes

Author Name: Willingham, Robert L.
 Author Title:
 Created Date:

Note Type: **Progress Note** Service Date: 6/1/2018 Duration: 15 Min
 Program: Couer d'Alene/20-511a Assessment : 6/1/2018 - Start Time: 9:00 AM Alert: No [Mark Alert](#)
 Frequency: End Time: 9:15 AM Was Report Sent to State:

Summary: enter a summary of what you did on the case

Signed Notes

Unsigned Notes
 Enter notes here

Release these notes? No

7. The Signed Note becomes read-only and an electronic signature and time stamp is created in the Signed Notes section.

Miscellaneous Notes

Author Name: Willingham, Robert L.
 Author Title:
 Created Date:

Note Type: **Progress Note** Service Date: 6/1/2018 Duration: 15 Min
 Program: Couer d'Alene/20-511a Assessment : 6/1/2018 - Start Time: 9:00 AM Alert: No [Mark Alert](#)
 Frequency: End Time: 9:15 AM Was Report Sent to State:

Summary: enter a summary of what you did on the case

Signed Notes

Unsigned Notes
 Enter notes here

Release these notes? No

8. Click  and  .