

## Scanning & Uploading Notes

**WARNING:** It is the user's responsibility to upload the correct documents on the correct client record. WITS does not check the client name or location when it uploads a document and will not prevent you from uploading to the wrong client or uploading to the wrong location.

**STANDARDS:** Effective July 1, 2019, all Notes (hand written or other types that must be kept) must be scanned as individual files and uploaded to the appropriate Encounter Note/Miscellaneous Note record in WITS for all new clients entered in WITS, and for any existing clients with a Note on or after July 1, 2019.

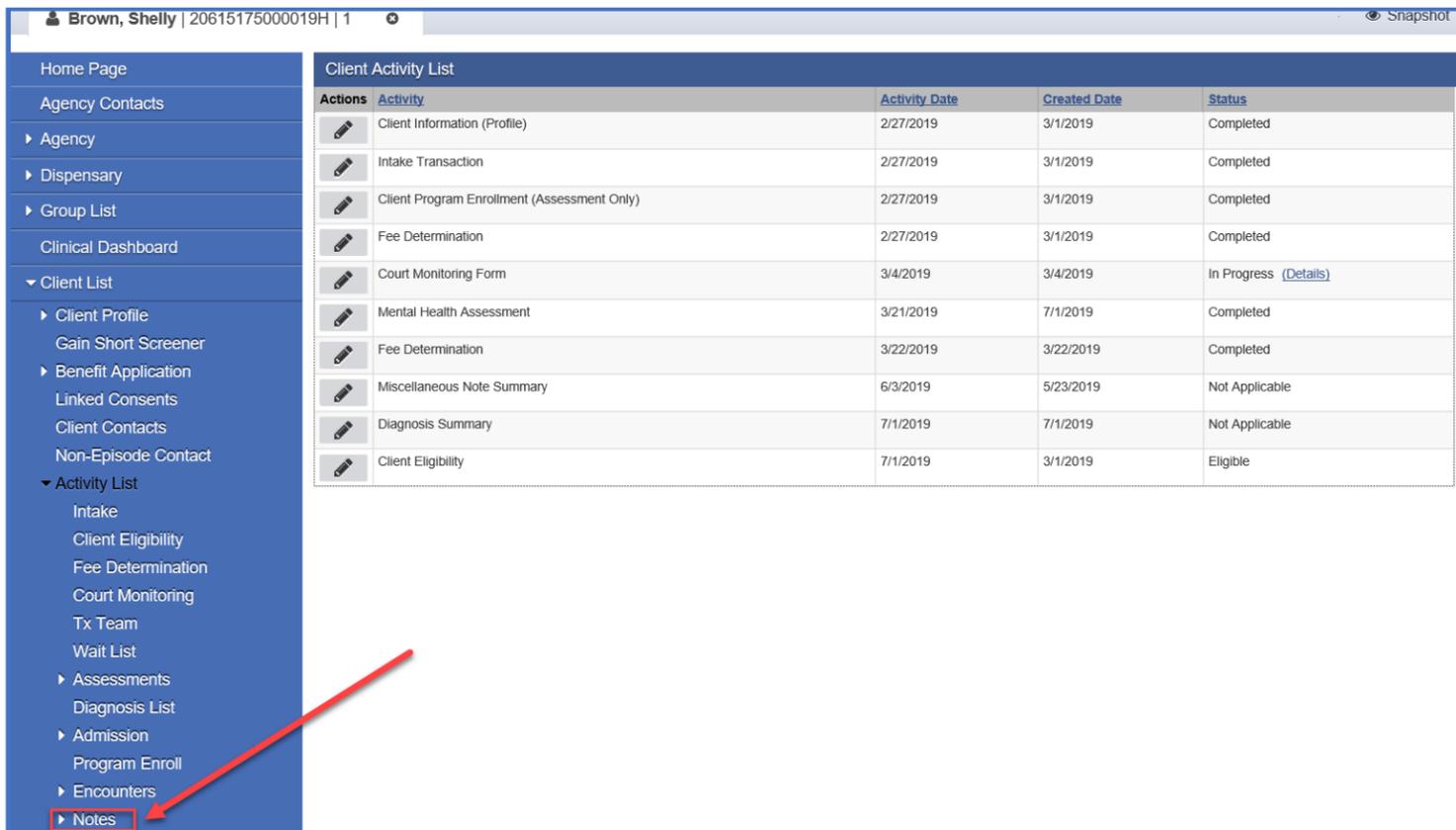
**STANDARDS:** Notes will be scanned and uploaded in WITS within five (5) business days of the creation of the Encounter Note/Miscellaneous Note. Each Note will be scanned as an individual file using the document storage file naming conventions and abbreviations.

**STANDARDS:** It is the Regions responsibility to ensure the standards set forth by policy [14-02 Behavioral Health Records Retention](#) in the [DBH Policy eManual](#) are followed.

**TIPS:** If you do not have the ability to upload documents, contact your contact your Regional WITS Administrator (RWA). RWAs will complete an [Online Portal Request](#) to request the Automation Help Desk assign the individual the role of Document Management (Full Access).

**TIPS:** The Encounter Note/Miscellaneous Note record must be saved before a scanned Note can be uploaded.

1. Scan and save the Note file to a secure location using the file naming convention: **Date Signed or Activity Date\_Name of Activity (description of the note followed by NOTE)\_Client Last NameClient First Name**.
  - a. Example: 201900624\_DRNOTE\_BrownShelly
2. Go to the Client Activity List.



Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	2/27/2019	3/1/2019	Completed
	Intake Transaction	2/27/2019	3/1/2019	Completed
	Client Program Enrollment (Assessment Only)	2/27/2019	3/1/2019	Completed
	Fee Determination	2/27/2019	3/1/2019	Completed
	Court Monitoring Form	3/4/2019	3/4/2019	In Progress <a href="#">(Details)</a>
	Mental Health Assessment	3/21/2019	7/1/2019	Completed
	Fee Determination	3/22/2019	3/22/2019	Completed
	Miscellaneous Note Summary	6/3/2019	5/23/2019	Not Applicable
	Diagnosis Summary	7/1/2019	7/1/2019	Not Applicable
	Client Eligibility	7/1/2019	3/1/2019	Eligible

3. Click **Notes** on the blue navigation pane.

Idaho-WITS Training 19.3.2 IDHW, DBH, Region 4, Boise

Brownfield, Joanna, LPN Logout

Brown, Shelly | 20615175000019H | 1 Snapshot

Notes Search

Start Date: 7/1/2018 End Date: 7/1/2019

Allow Disclosure of Note: [Dropdown]

Clear Go

Notes List

Add New Misc. Note Print Notes Add New Encounter Note

Actions	Note Type	Date	Duration	Staff	Service/Summary
Review	Prescriber Note	7/1/2019	15 Min	Brownfield, Joanna, LPN	Pharmacologic Management-ME
	Administrative Note	6/28/2019	30 Min	Brownfield, Joanna, LPN	Nursing assessment/evaluation...
	Administrative Note	6/24/2019	15 Min	Brownfield, Joanna, LPN	Client did not show up for the...
	DE Note	6/3/2019	30 Min	Brownfield, Joanna, LPN	ddd
	ACT (Peer-Specialist) Note	5/23/2019	30 Min	Buskey, Michelle, ACADC	sss

4. Hover over the and click **Review** under Actions.

Brown, Shelly | 20615175000019H | 1 Generate Report Documents (0) Snapshot

This encounter has been released and should not be edited.

Encounter 2 of 2

Note Type: Prescriber Note  
 ENC ID: 12298  
 Created Date: 7/1/2019 1:59 PM

Program Name: Boise/ACT : 7/1/2019 -  
 Parent Service:  
 Service: Pharmacologic Management-ME

Start Date: 7/1/2019 End Date: 7/1/2019  
 Service Location: Office Start Time: 1:00 PM End Time: 1:15 PM  
 Duration: 15 Min  
 # of Service Units/Sessions: 1  
 Client Attended: Yes

Diagnoses for this Service

Primary: F31.9-Bipolar disorder, unspecified(ICD)  
 Secondary:  
 Tertiary:

Rendering Staff: Brownfield, Joanna, LPN Released To Billing Date: 7/1/2019 3:59 PM  
 Supervising Staff:  
 Released To Billing By: Brownfield, Joanna, LPN

Signed Notes

5. Click Documents (0).

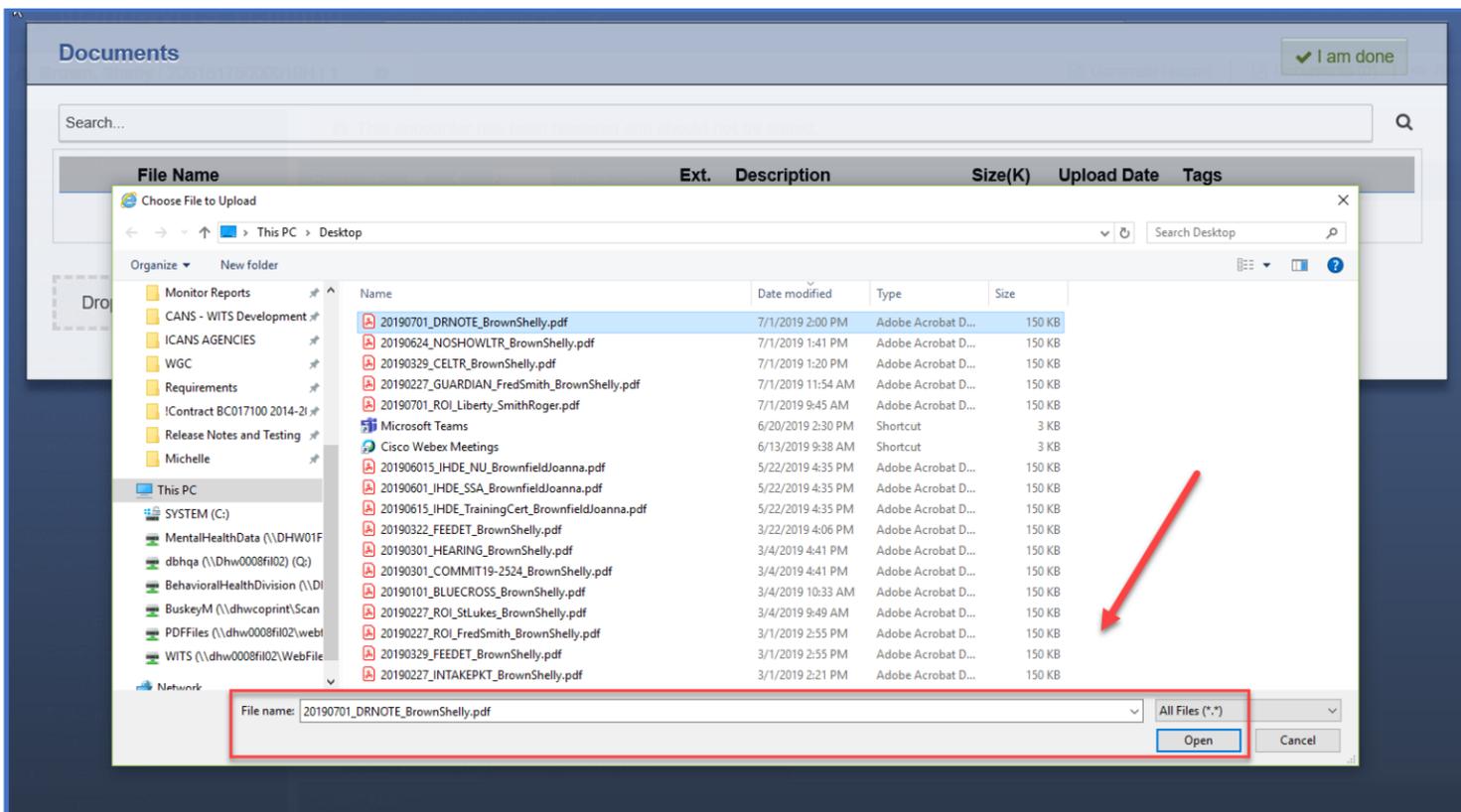
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Documents I am done

File Name Ext. Description Size(K) Upload Date Tags

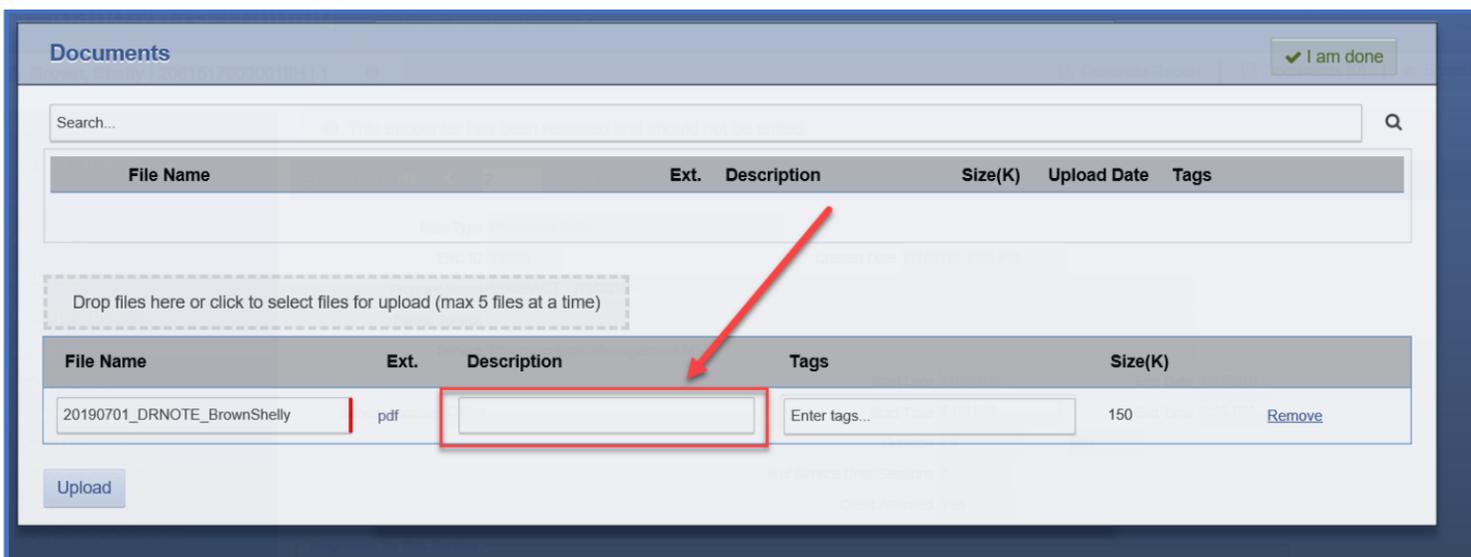
Drop files here or click to select files for upload (max 5 files at a time)

6. Click Drop files here or click to select files for upload (max 5 files at a time).

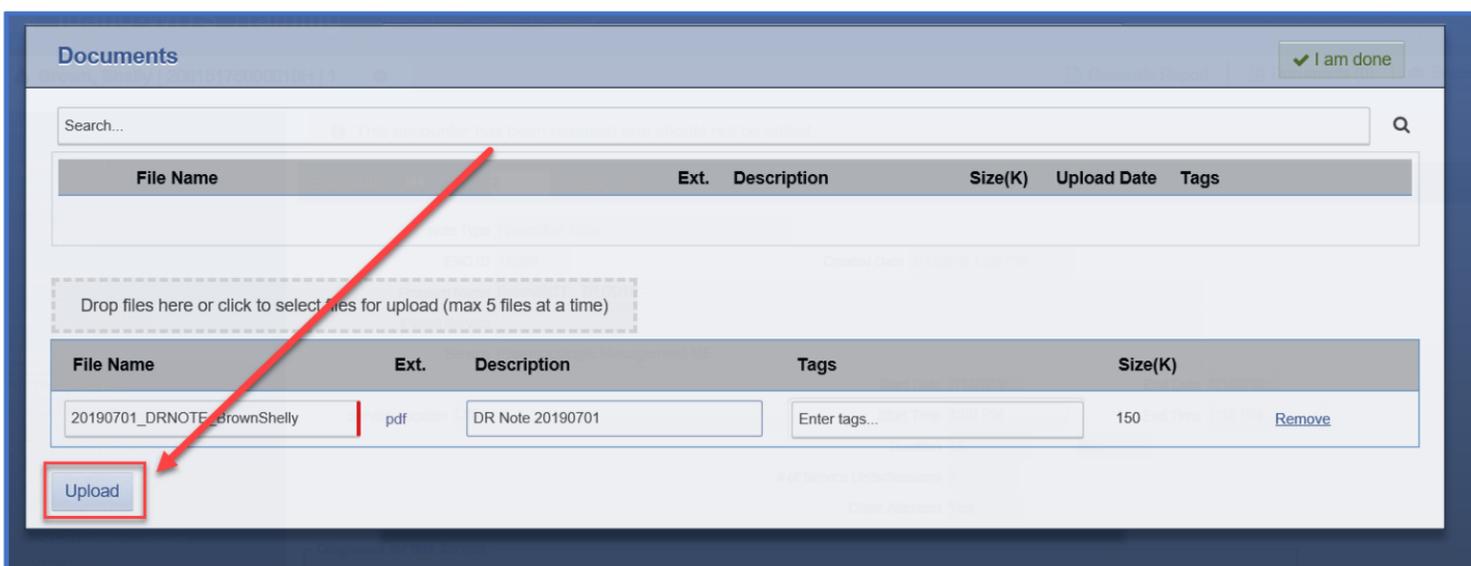


7. Select the scanned Note on the secure location and click Open.

**TIPS:** Descriptions include the Activity Type along with the Agency Name/Individual's Name.

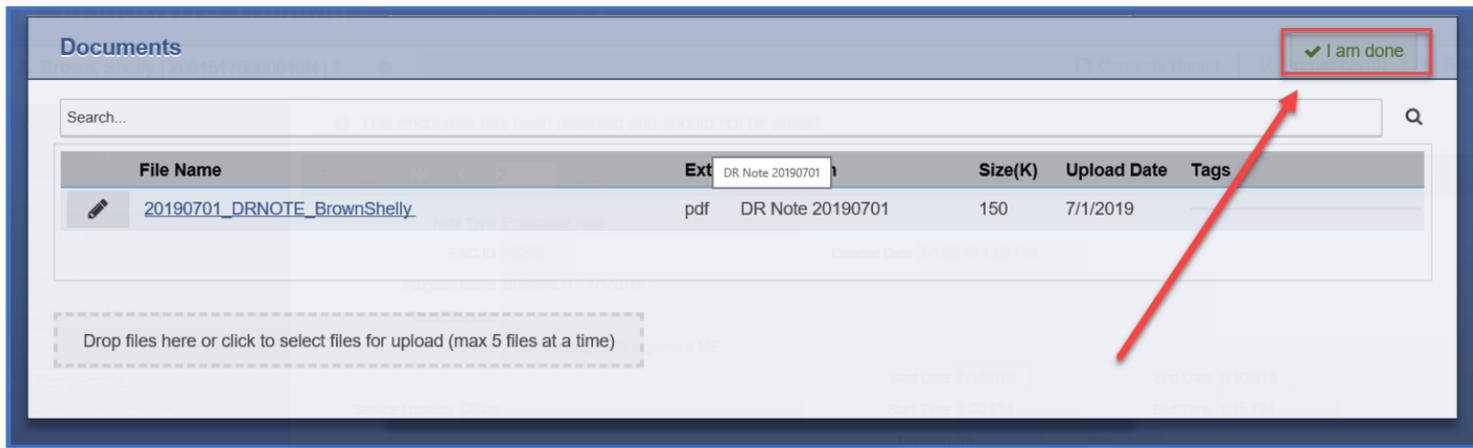


8. Enter a description if needed.  
 • Example: DR Note 20190701

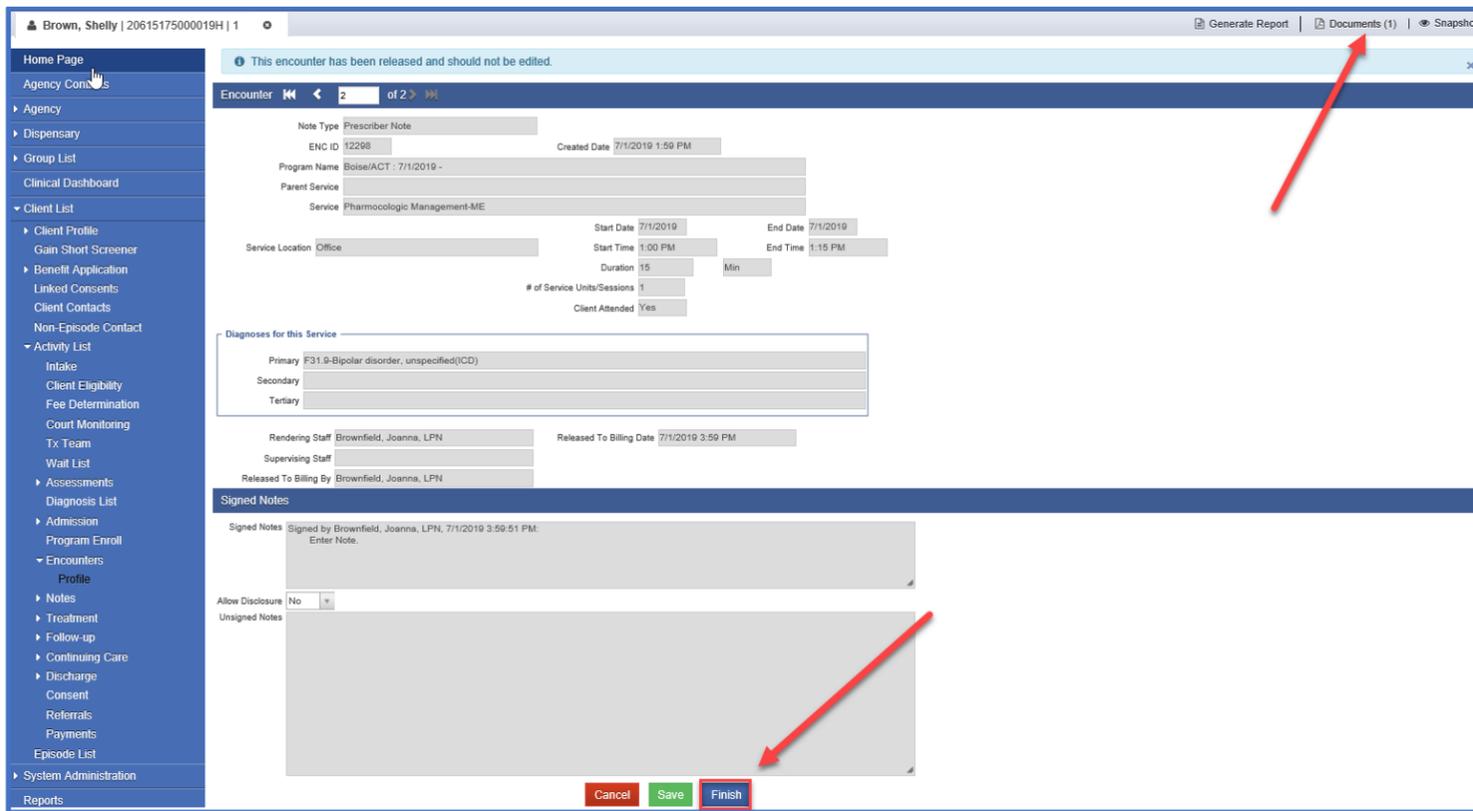


9. Click .

**TIPS:** If the full description is not displayed, hover over the description and a pop up will display the information entered in the description field.



10. Click .



11. The Note is uploaded to the Note record in WITS. Click .

12. Remove the scanned Note file from the secure location.