

# SMART Tip Sheets Encounters

## 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, Activity List, Encounters

1. 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.

1. Complete at all required system and agency fields.

Note: If the client is a drug court client please enter the **Tx Outcome** to ensure that it appears on the **Client Progress Report**.

1. Click → to advance to the next screen.

SMART 19.1.1 Administrative Agency (MD-100100), IGSR North Koch, Christina Logout

Rabbit, Roger | M010152222RA | 1 Generate Report Snapshot

Encounter Search

Start Date: 6/14/2018 End Date: 6/14/2019  
Rendering Staff: Service: Encounter Status: Program:  
Allow Disclosure of Note: Tx Outcome:

Encounter List (Export)

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status
	6/6/2019	5 - SUPPORT GROUP	7120726	Koch, Christina	MariTeds	Not Released
	8/31/2018	INDIVIDUAL COUNSELING	7065374	Sherman, Stephan	MariTeds	Not Released
	8/31/2018	5 - SUPPORT GROUP	7065366	Chang, Shinyu H.	MariTeds	Not Released
	8/30/2018	INDIVIDUAL COUNSELING	7065151	Sherman, Stephan	MariTeds	Not Released
	8/29/2018	INDIVIDUAL COUNSELING	7064867	Sherman, Stephan	MariTeds	Not Released
	8/29/2018	INDIVIDUAL COUNSELING	7064866	Sherman, Stephan	MariTeds	Not Released
	8/28/2018	INDIVIDUAL COUNSELING	7064820	Sherman, Stephan	MariTeds	Not Released
	8/24/2018	INDIVIDUAL COUNSELING	7063934	Sherman, Stephan	MariTeds	Not Released
	8/24/2018	INDIVIDUAL COUNSELING	7063932	Sherman, Stephan	MariTeds	Not Released
	8/24/2018	INDIVIDUAL COUNSELING	7063931	Sherman, Stephan	MariTeds	Not Released
	8/24/2018	INDIVIDUAL COUNSELING	7063930	Sherman, Stephan	MariTeds	Not Released
	8/23/2018	INDIVIDUAL COUNSELING	7063664	Sherman, Stephan	MariTeds	Not Released

SMART 19.1.1 Administrative Agency (MD-100100), IGSR North Koch, Christina Logout

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Encounter

Note Type: ENC ID: Program Name: Service: Start Date: End Date: Service Location: Start Time: End Time: Duration: Pregnant: Emergency: # of Service Units/Sessions: Billable: Yes

Diagnoses for this Service: Primary: Secondary: Tertiary:

Rendering Staff: Koch, Christina Payment Source: Supervising Staff: Tx Outcome:

Administrative Actions: Release to Billing

Cancel Save Finish →

# 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, objectives, and interventions that were addressed in each particular session by clicking **Add Goal**, **Add Objective**, or **Add Intervention** 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 un-editable), 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.
1. 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.
2. Click **→** to advance to the **Ancillary Services Screen**
3. Click **Save** or **Finish** after completing the last screen
4. To print a list of **Encounters** for this client, including the notes, click **Print Report** and a report will generate

# Encounters

## Miscellaneous Notes

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

1. Entry Steps: Login, Select Facility, Client List, select client, Activity List.
2. From the Activity List, click Notes, then click Add New Misc. Note. Complete all system and agency required fields.
3. 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 un-editable), 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.
4. Release these Notes: Release these Notes defaults to **No**, meaning that the note will not be consented even if the encounter in the module is consented to another agency. By selecting **Yes**, if encounters are shared through the consent process, this note will also be included.
5. Click on **Save** or **Finish**

*Note:* Use the **Alert** feature by clicking the **Mark 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. The **Miscellaneous Notes** screen becomes non-editable once you click **Save** or **Finish**.

To access Miscellaneous Notes, click Notes

To enter a new Miscellaneous Note, click Add New Misc. Note

Actions	Note Type	Date	Duration	Staff	Service/Summary
	Case Management Note	6/6/2019	60 Min	Koch, Christina	5 - SUPPORT GROUP
	Medication Administration Progress Note	8/31/2018	60 Min	Chang, Shinyu H.	5 - SUPPORT GROUP
	Progress Notes	8/31/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/30/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/29/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/29/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/28/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/24/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/24/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/24/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/24/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/23/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING

Click Finish, when done

Click Sign Notes to sign your notes.

Release these notes? No

# Encounters

## 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** to pull up the **Notes List** screen. This generates both the **Encounters** and the **Miscellaneous Notes**.

1. Click Print Notes at the top right.

1. Enter the desired date range (e.g. 1/1/19:2/1/19) in the **Note Date** field, and click Go.

1. 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.

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.

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

Enter the date range, and click Go to generate the report.

To print a report of the Miscellaneous Notes for this client, click Print Notes

Actions	Note Type	Date	Duration	Staff	Service/Summary
	Medication Administration Progress Note	8/31/2018	60 Min	Chang, Shinyu H.	5 - SUPPORT GROUP
	Progress Notes	8/31/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/30/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/29/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/29/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/28/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/24/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
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	Progress Notes	8/24/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/24/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/23/2018	30 Min	Sherman, Stephan	INDIVIDUAL COUNSELING
	Progress Notes	8/23/2018	31 Min	Sherman, Stephan	INDIVIDUAL COUNSELING

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.

Date	Staff	Client	Type	Program	Start Time	End Time	Summary	Signed Note
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