

Question: How can I find all the encounters that have occurred on a certain day? For example I want to find the IC on October 31, 2014.

Answer: WITS has a feature, Encounter Search located in the Agency/Billing menu, that allows you to search and display all encounters based on your selection criteria.

The screenshot displays the WITS Encounter Search interface. On the left is a blue navigation menu with the following items: Home Page, Agency (expanded), Agency List, GPRA Discharge Due, GPRA Followup Due, Facility List, Staff List, Tx Team Groups, Non-Staff Physicians, System Usage, Billing (expanded), Invoicing, Claim Item List, Claim Batch List, **Encounter List** (highlighted), EOB Transaction List, Payment List, Billing Transaction List, Client Balance, Cost Center, Payor Plan List, and Authorization List. A red callout box points to 'Encounter List' with the text: "1. Click 'Encounter List' menu pick".

The main content area is titled 'Encounter Search' and contains the following search criteria fields: Enc ID, First Name, Program, Status (dropdown), Balance, Rendering Staff, Last Name, SSN, Service Start, Payor Plan (dropdown), Supervising Staff, Procedure Code, and Facility (dropdown). There are 'Clear' and 'Go' buttons at the bottom right of the search form.

Below the search form is an 'Encounter List (Export)' table with the following columns: Actions, Enc ID, Client Name, Svc Start, Status, Duration, Procedure, Rend. Staff, Program Name, and Balance. The table currently shows no data rows.

This feature can be used to:

1. Review all unreleased/unfinalized encounter notes instead of going to each individual client's encounter list.
2. Release encounters to claims or finalize (close) encounters.
3. Finding any or all encounters entered into WITS.

Search Parameter	Description
Enc ID	Full or partial encounter ID
Rendering Staff	Full or partial rendering staff name
Supervising Staff	Full or partial supervising staff name
First Name	Full or partial client first name
Last Name	Full or partial client last name
Program	Full or partial program (enrollment) name
SSN	Full or partial social security number
Procedure Code	'H0004' = Individual Counseling
Status	All Unreleased; Not Released; Rejected; Released; Non Billable; Pre-WITS Billing
Service Start Date	Single date or date range. Example: 12/25/2009; 11/1/2013:11/30/2013
Facility	Select from Agency facilities (dropdown list)
Balance	Unpaid claim balance
Payor Plan	Select from Agency payor plans (dropdown list)

NOTE: All search parameters are mutual exclusive and selecting multiple search parameters results in a logical AND search. The results table is limited to 1,000 entries, so search parameters may need to be tightened by either using additional search criteria or reducing/adding date ranges, etc.

Example 1: If you enter a partial client first name (Jam*) and a partial client last name (Smi*), the search query will be:

Find all the encounters for clients whose first name begin with 'Jam' and whose last name begins with 'Smi'.

Example 2: If you enter service date 10/31/2014 and service code H0004 (individual counseling), the search query will be:

Find all the individual counseling (H0004) encounters for 10/31/2014.

To use this feature, you must have access to Agency Billing (role attribute) and Billing Encounter List (role).