RESIDENTIAL ENCOUNTERS AND BED MANAGEMENT PRACTICE GUIDE

1. ADD AUTHORIZATION'S (7-10)

Client Profile → Authorization → Add New Authorization Record
Complete All **Yellow Fields** → Save
Initial Authorization is for **15 days**. Add Service → Finish → Finish Again
Repeat steps to add the follow up authorization for **75 Days**

2. PROGRAM ENROLLMENT (14-16)

Activity List → Program Enroll → Add Enrollment (ODS 3.1 RES)
SAVE

3. BED ASSIGNMENT (17-19)

Select Inpatient Unit → Go
Locate **Room** and your assigned **Bed #** → From Actions → Assign
Enter Expected Date of Discharge→ Save → Click **YES** to confirm assignment

4. ADD NEW DAILY CENSUS (27-29)

Residential Unit Mgmt → Residential Unit Census → Add New Daily Census
Select Inpatient Unit → Enter your Assigned Date → Click Go
Select all clients → Click Create New Census

5. ACCESS THE NOTES (ENCOUNTER) (30-33)

Residential Unit Dashboard → Locate your client→ Actions → Notes
From Notes List → Actions → Review
Save and Finish

6. ADD CASE MANAGEMENT ENCOUNTER (34-40)

Activity List → Encounters → Add Encounter
Complete all yellow fields
Change Rendering Staff → Staff, Rendering
Save and Finish

7. END PROGRAM ENROLLMENT(41)

Activity List → Program Enroll
Select ODS 3.1 RES → Actions → Review → Save
Complete the **Discharge Profile**

RECOVERY SERVICES

8. PROGRAM ENROLLMENT (48)

Activity List → Program Enroll → Add Enrollment (Recovery Services) for each of your clients

Save & Finish

9. CREATE GROUP PROFILE (53-54)

Group List → Add → Create Group Name (*Life Skills +your initials + today's date)

Save

10. CREATE THE ROSTER (54-55)

Edit Roster → Add Members→ Save

(Add both clients)

Finish when all clients have been added

11. CREATE GROUP SESSION (59-60)

From Group Profile, go to Administrative Actions → Create Group Session

Complete all yellow fields and white Note field

Save

12. UPDATE ATTENDEES AND CREATE ENCOUNTERS (61-62)

Select all clients → **Mark As Present** → Perform Action

Select all clients Present → **Create Encounter**→ Perform Action

Continue to **'Refresh'** until **Encounter column** shows **"View"**

13. EDITING THE ENCOUNTER (62-64)

Click **View** under Encounter → Review the Encounter

Review Hints: Enter Documentation Time, Replace **None** from Evidence Based Practice, Change Rendering Staff if needed

Save & Finish

14. Email trainer to verify your work