FEI Systems

WITS

Florida WITS

WITS End User Guide

Florida WITS

Last Updated July 2020

Florida WITS

State Opioid Response (SOR) Grant

Preface

"**The State Opioid Response (SOR) program** aims to address the opioid crisis by increasing access to medication-assisted treatment using the three FDA-approved medications for the treatment of opioid use disorder, reducing unmet treatment need, and reducing opioid overdose related deaths through the provision of prevention, treatment and recovery activities for opioid use disorder (OUD) (including prescription opioids, heroin and illicit fentanyl and fentanyl analogs)."[1]

ASAM CONTINUUM Triage™ (CO-Triage) is a provisional screening and referral tool for alcohol and substance problems. The CO-Triage questions help clinicians identify broad categories of treatment need along the six ASAM Criteria Dimensions. ASAM CO-Triage provisionally recommends an ASAM Level of Care (ASAM Levels 1, 2, 3, 4 and Opioid Treatment Services) to which a patient should proceed to receive an ASAM CONTINUUM™ Comprehensive Assessment.

ASAM CONTINUUM™ is a computerized clinical decision support system (CDSS). ASAM CONTINUUM provides the entire treatment team with a computer-guided, standardized interview for assessing patients with substance use disorders and co-occurring conditions. ASAM CONTINUUM aids clinicians in conducting a full biopsychosocial assessment that addresses all six dimensions of The ASAM Criteria. The decision engine uses research-quality questions (including tools such as the ASI (Addiction Severity Index), CIWA (Clinical Institute Withdrawal Assessment) and CINA (Clinical Institute Narcotic Assessment) instruments to generate a comprehensive patient report which includes a final recommended level of care determination.

Intended Audience

This user guide has been prepared for Florida provider agency staff delivering SOR services to individuals. Information included will assist providers in understanding modifications added to Florida's WITS SOR system regarding Supplemental Questions asked on each GPRA interview and two (2) new post discharge interviews.[2]

System Requirements

WITS is a web-based application accessed through an Internet (web) browser using an Internet connection.

Internet Browsers

WITS is compatible with up-to-date versions of most modern Internet browsers such as:

- Apple® Safari®
- Google Chrome™
- Mozilla® Firefox®
- Windows Internet Explorer 10 or newer

Note: Do not allow your Internet browser to save your password, as this information will be routinely updated.

[1] Source: https://www.samhsa.gov/grants/grant-announcements/ti-18-015

[2] Reference: Enhancement 59306: GPRA: Add Additional Supplemental Questions and Post-Discharge Interviews for SOR

Pop-up Blocker

Certain features in WITS, such as Snapshot and Scheduler, will open in a separate browser window when selected. Make sure your browser allows pop-ups from WITS.

Customer URL Links

Training Site: https://fl-training.witsweb.org

Production Site: https://fl.witsweb.org

The **Training Site** allows staff members to practice using the system before entering actual data in the Production Site. ***Do not enter real client information in the training site***.

Note: Notes contain information for users to take note of, as the information may affect what the user does with the system.

Tip: Tips contain information helpful to the user, such as providing an easier way to do something.

Important: Typically, these highlight details for the user to consider or review before continuing with a step or action within the system. This information may warn the user about possible error messages that may occur if the instructions are not followed, or it may indicate/remind users of additional actions to take before proceeding, such as downloading required software.

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Part 1: Customer Specific Information

WITS allows providers to easily enter information for individuals and services they receive as part of the SOR program.

- The initial provider agency that works with an individual will create the client profile, intake, and enroll the client into a SOR program.
- If the provider agency needs to refer an individual to another provider for services, WITS has an automated consent/referral process that is HIPAA/42 CFR Part 2 compliant. Once the referred-to service provider accepts the referral, WITS will automatically set up the client profile, intake and SOR program enrollment.
- In the future, once SAMHSA has OMB certification for the GPRA, the initial agency can enter GPRAs or the referred-to agency can enter the GPRAs. WITS will ensure that there are no duplicate GPRAs created for individuals enrolled in the SOR program. Also, if the providers have entered encounters, WITS will map those encounters to the SOR discharge GPRA.

Workflow Diagram

The following diagram illustrates the standard SOR workflow process.

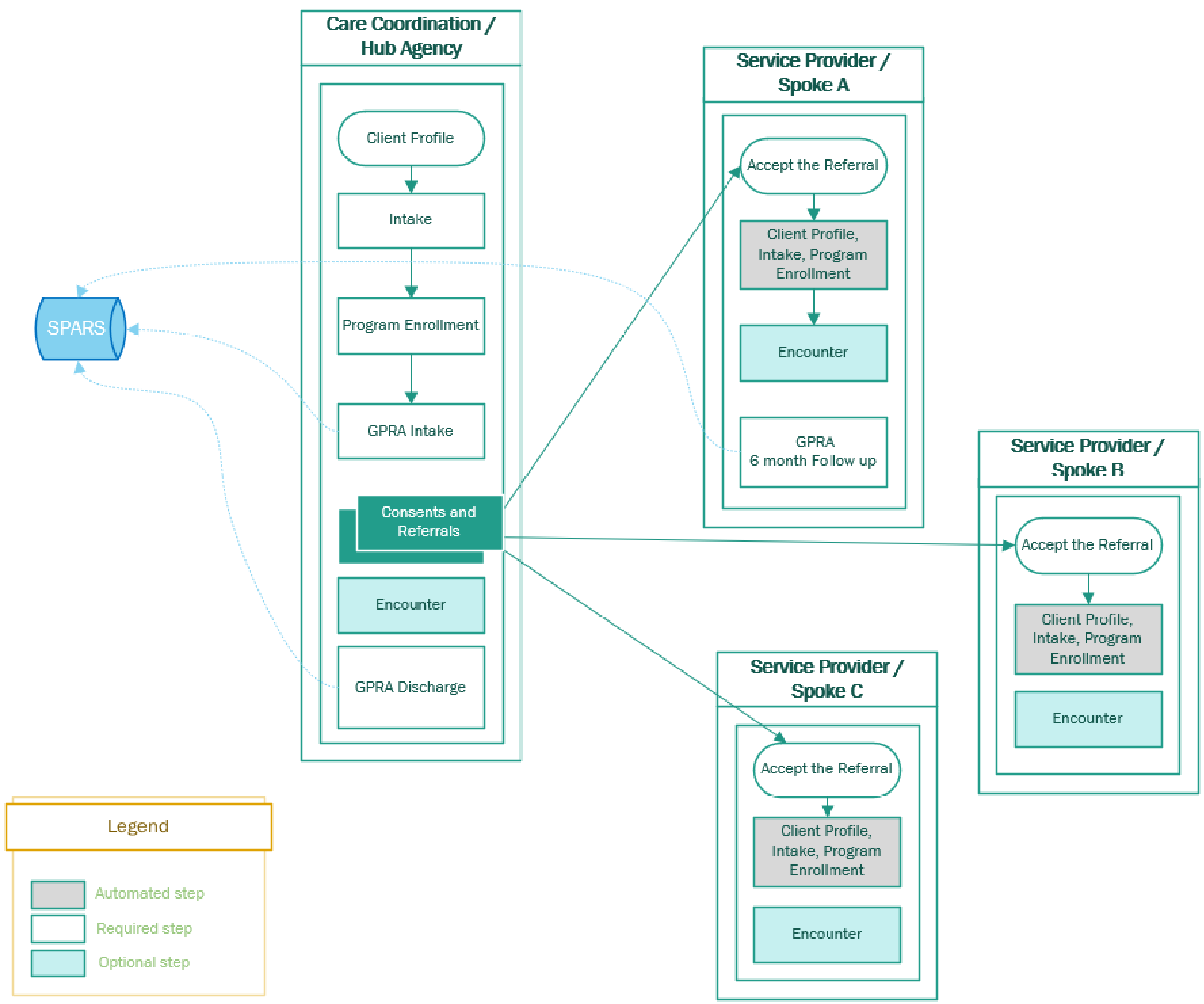


Figure 1-1: Standard SOR Workflow Diagram

Grant Episode Concepts

Where: Agency > Agency List > Facility List > Programs

Background

When a client's GPRA interviews are completed, they are sent to SPARS. Each type of GPRA Interview (Intake, 6-Month follow up, Discharge) is sent automatically as an upload from WITS. If the same type of GPRA is sent twice (for example, if two GPRA Intakes are completed), SPARS will inactivate the first GPRA Intake interview when the second is completed. In order to prevent older interviews being inactivated in error, WITS now has a grant episode.

Grant Episode Concepts

Table 1-1: Grant Episode Events and Information

Event	Information
GPRA Menu Item	The ability to enter a GPRA in WITS only becomes available when a WITS client program enrollment (CPE) exists where the associated program has a value in the Grant field and the end user has the GPRA (Full Access) security access role.
Grant Episode	This allows the client to be referred to other agencies and have the same grant episode. If Agency A completes the GPRA Intake and then refers the client to Agency B, Agency B will be able to continue the grant episode and complete the GPRA 6-Month Follow Up and GPRA Discharge interviews for the same client. This will prevent another agency from inadvertently inactivating the previous GPRA Intake because the grant episode will remain assigned to this client in other agencies. 1. The Grant Episode is created and put into a 'Pending' status when the Client Program Enrollment (CPE) is created for a program with a Grant field value. 2. The Grant Episode follows the client's UCN throughout the process of creating GPRAs. 3. The 'Pending' grant episode will become 'Active' once the GPRA Intake interview is completed. 4. It will remain active through the 6-Month Follow-Up, Discharge, 3-Months Post Discharge and 6-Months Post Discharge Interviews. 5. Once all 5 interviews are completed, the Grant Episode will have a status of 'Closed.' 6. Once the Grant Episode is 'Closed', a new 'Pending' Grant Episode can then be created if the client needs treatment again. 7. The WITS Administrator could change Grant Episode from 'Active' to 'Inactive' (this can be done upon creation of a client program enrollment within a different agency).

WITS Administrator Process

Use Case: Client with GPRA intake at one provider goes to another provider <u>without</u> a WITS consent/referral

1. If the client goes to another provider who attempts to add a Client Program Enrollment in SOR and that client/UCN already has an 'active' grant episode, the system will prohibit this.
    - The provider/user will be presented with a WITS error message to contact their WITS Administrator.
    - The provider/user should first consult with the client to determine where they had already received SOR services, obtain a signed consent from the client in order to discuss the case with the other agency.

  - If consent is given by the client, the provider should coordinate with the other agency, and ask that a Consent and Referral be created in WITS by that agency to send the client's case to the agency where the client is currently present.

2. If no other option exists, the provider should contact their ME to help resolve the issue.

Intake Close Processor

For customers only using SOR, the **Intake Close Processor** is a scheduled task that runs every night to automatically close client intakes. Client intakes will be closed when all Client Program Enrollments are for a closed or inactive grant episode and there has been no activity within that client intake (no encounters saved or updated) for a certain number of days. The default number of days is set to 45, but the number can be changed in a site's configuration.

Important: The Intake Close Processor applies to SOR only customers.

Supplemental Questions and Post-Discharge Interviews

Business Need

Florida has a need to ask additional questions pertaining to the SOR grant within the GPRA interviews because the current GPRA questions do not fully assess the client's life situation during GPRA Intake, Discharge and Follow up. These additional questions will be asked at the end of the GPRA interview and displayed in a new section labeled, "Supplemental Questions".

In addition, Florida would like to track a client's progress for a longer-term than what is required by SAMHSA. Therefore, two additional GPRA interviews for SOR grant will be done at 3 months and 6 months post Discharge.

Adding six additional supplemental questions and the 2 additional post discharge interview types will provide a better picture of the client during all GRPA interviews to ensure that the data collected meets the SOR Grant requirements.

Overview of System Changes

- Two (2) Post-Discharge GPRA interviews are now required:
  - 3-month Post Discharge
  - 6-month Post Discharge
- The Supplemental Questions section will be added to the end of the GPRA and will be its own screen for all five (5) data collection periods:
  - Intake
  - 6-month Follow up
  - Discharge
  - 3-month Post Discharge
  - 6-month Post Discharge

SPARS and Pre-existing GPRA Interviews

- Supplemental Questions will not be included in the nightly upload to SPARS.
- For all pre-existing GPRA Intake, GPRA Follow-up and GPRA Discharge interviews, the Supplemental Questions screen will be displayed with a default value of "Not Applicable" in all the questions.

The grant episode will not close until all five (5) GPRA types are completed:

- Intake

- Follow Up
- Discharge
- 3-Month Post Discharge
- 6-Month Post Discharge

Part 2: Client Setup

Search for a Client

Where: Client List Screen

Before creating a new client record, search for your client to make sure the client is not already in WITS.

1. To view clients within your agency, click on the **Client List** menu item. A blank Client List screen will appear.
2. Use the fields in the **Client Search** section to narrow your results.

Tip: When searching for a client, try to use unique information, such as birthdates or social security numbers, if possible. You can also enter a partial name (or other field) followed by a "*". This is called a **wild card search**. For instance, if you search for Last Name of "Smit*", the search results will display people with the last name of "Smith", "Smitty", "Smithson", etc.

3. After selecting from the search fields, click **Go** to view the results.

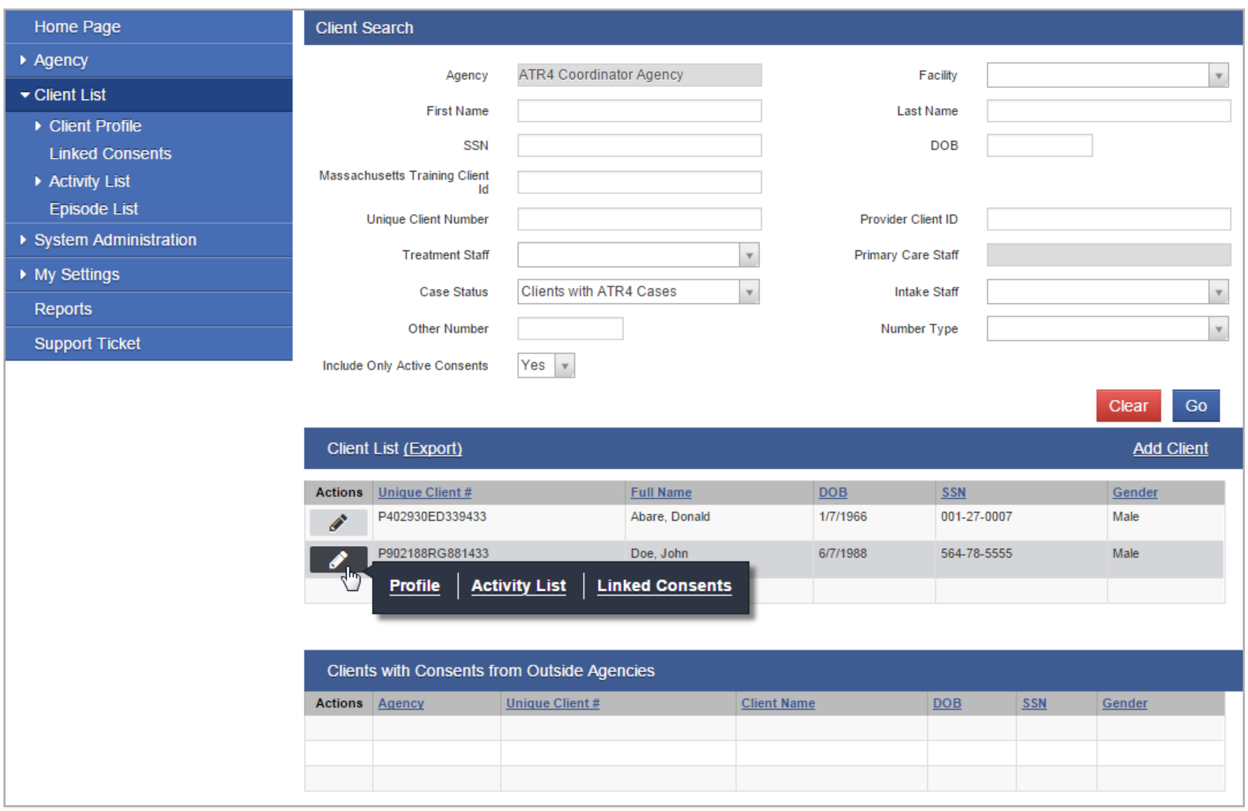


Figure 2-1: Client List screen, Action links

4. Look for your client in the **Client List**. If you find the right person, view their profile by pointing to the pencil icon in the Actions column and clicking the **Profile** link. If you do not find your client, you can create a new client record.

Client Search Tips

Client Name or Number

Use a client's nickname or alternate names in the **First Name** or **Last Name** fields.

Use an **asterisk** (*****) to perform a wildcard search.

Examples:

- Find clients whose last name starts with "Jon": Jon*

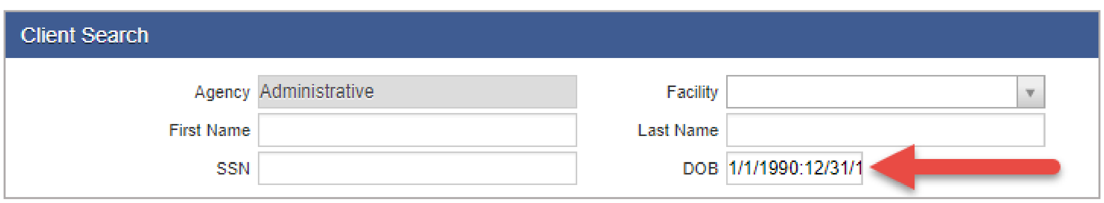
- Search by the last 4 digits of a client's SSN: *1123

Client Birthday or Age

Search within a timeframe by separating the two dates with a **colon** (**:**). Search for clients born after a certain date with a **greater than sign** (**>**). Search for clients born before a certain date with a **less than sign** (**<**).

Examples:

- Find clients born in the year 1990: 1/1/1990**:**12/31/1990



- Find clients born after a certain date: >12/30/1959

Create Client Profile

Where:* *Client List* > *Client Profile

To add a new client to the system, follow the steps below.

Note: Please search for each client before creating a new record.

1. On the left menu, click **Client List**.
2. On the Client List screen, click **Add Client**.

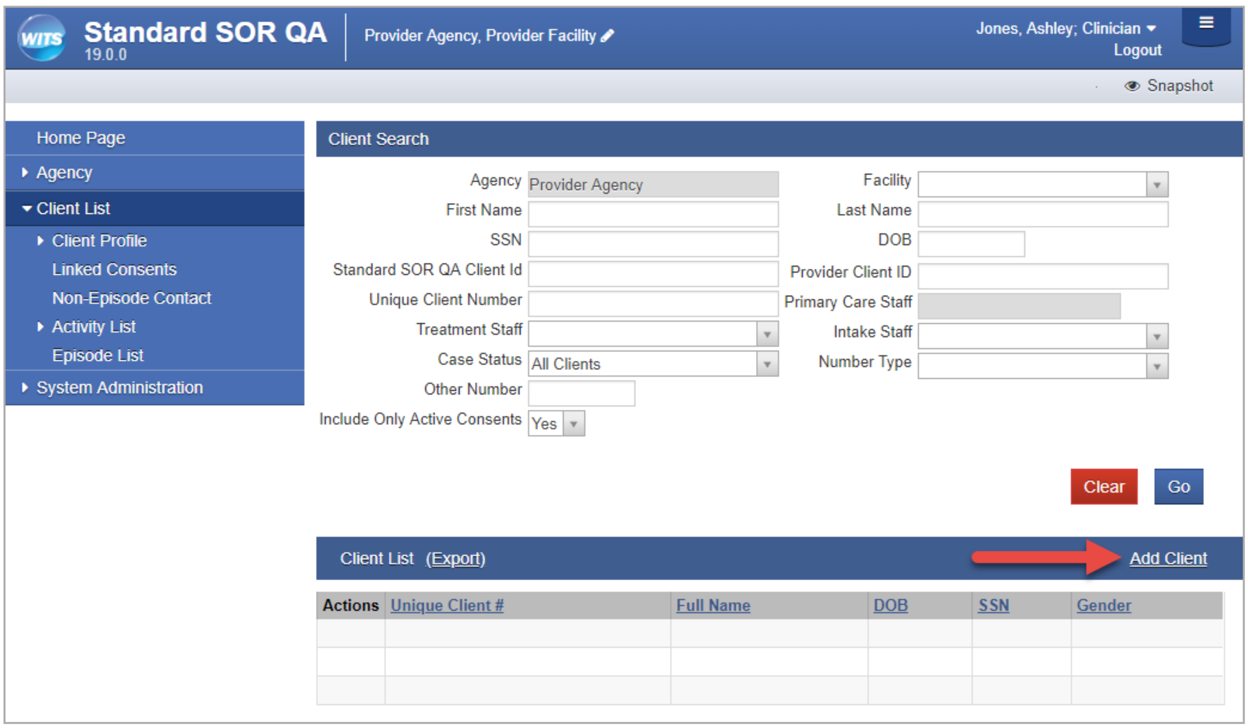


Figure 2-2: Client Search/List screen; Add Client link

3. On the **Client Profile** screen, enter the required client information. See the table below for information on each field.

Important: When adding new clients to the system, review the Client Profile fields for accuracy before saving the screen. Once the Client Profile screen is saved, a Unique Client Number (UCN) is created based on the data provided. It is important to enter client information correctly to avoid duplicate client entry in the future.

Table 2-1: Client Profile fields

Field	Description
First Name	Type the client's current first name.
Middle Name	(Optional)
Last Name	Type the client's current last name.
Mother's Maiden Name	(Optional)

Field	Description
Suffix	(Optional)
Gender	Select the client's gender from the drop-down list.
DOB	Enter the client's date of birth.
SSN	Type the client's Social Security Number.
Driver's License and State	(Optional) Type the number and then select the State from the drop-down list.
Has paper file	(Optional) Select Yes or No. Field defaults to Yes.
Provider Client ID	(Optional)

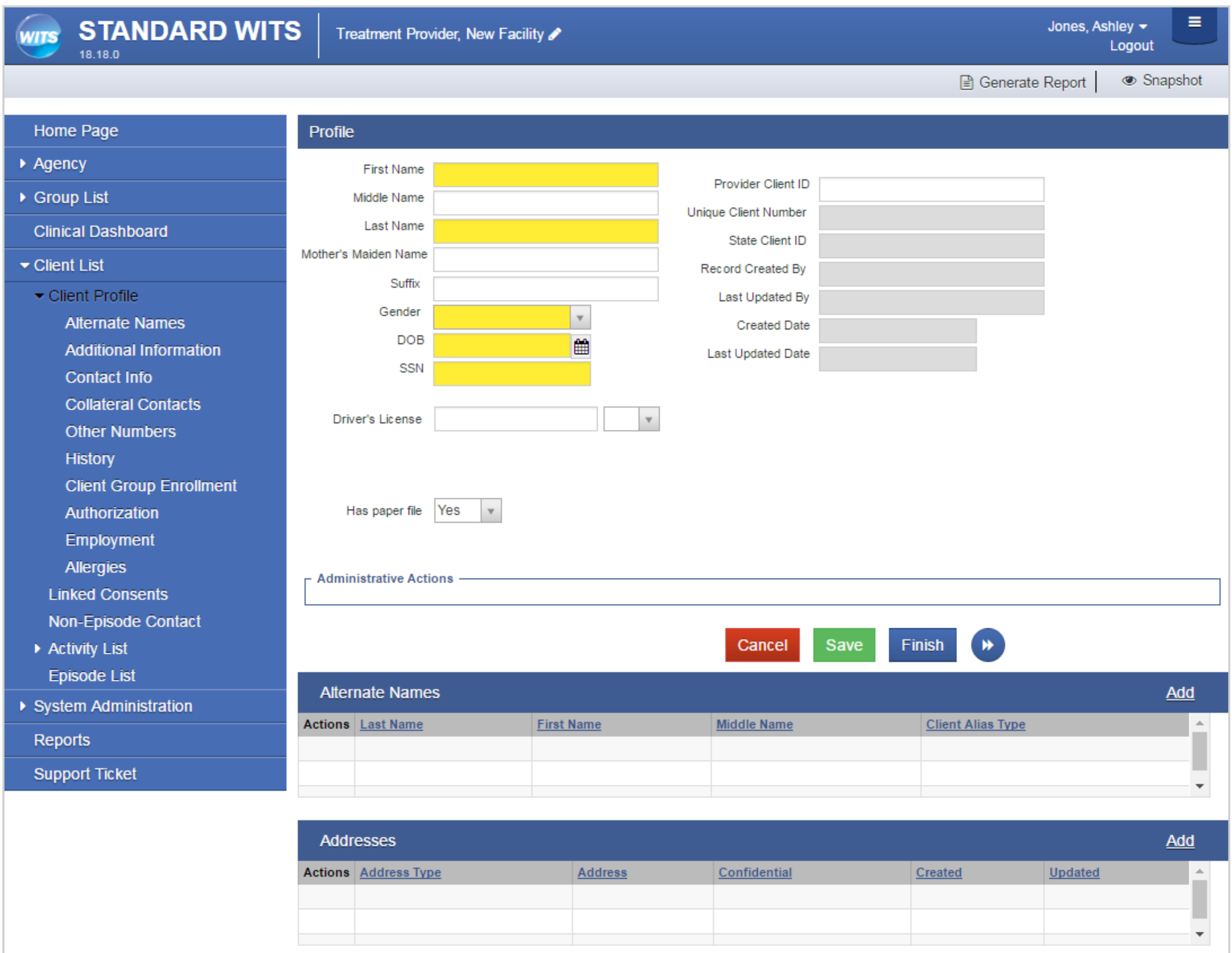


Figure 2-3: Client Profile screen

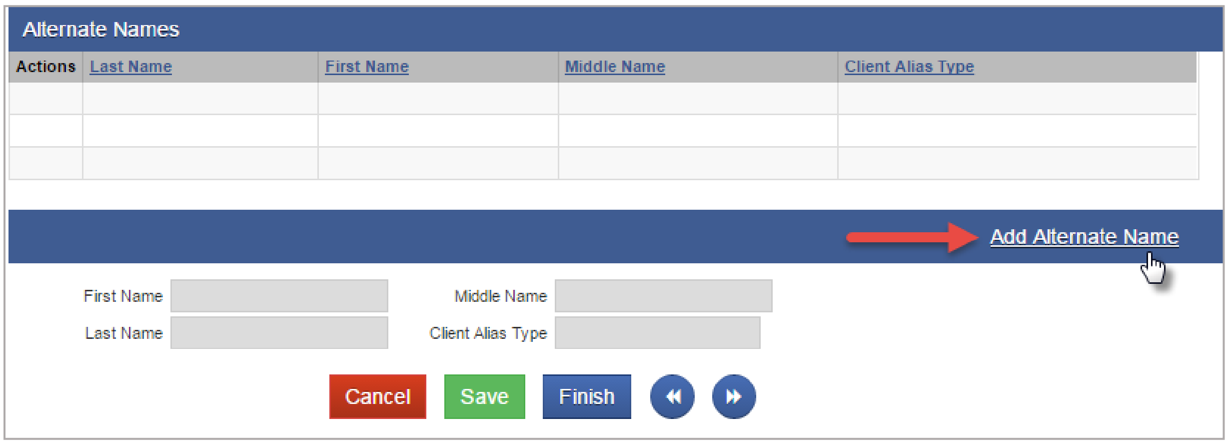
4. Click **Save**.
5. Click the **right-arrow** to move to the **Alternate Names** screen.

Alternate Names

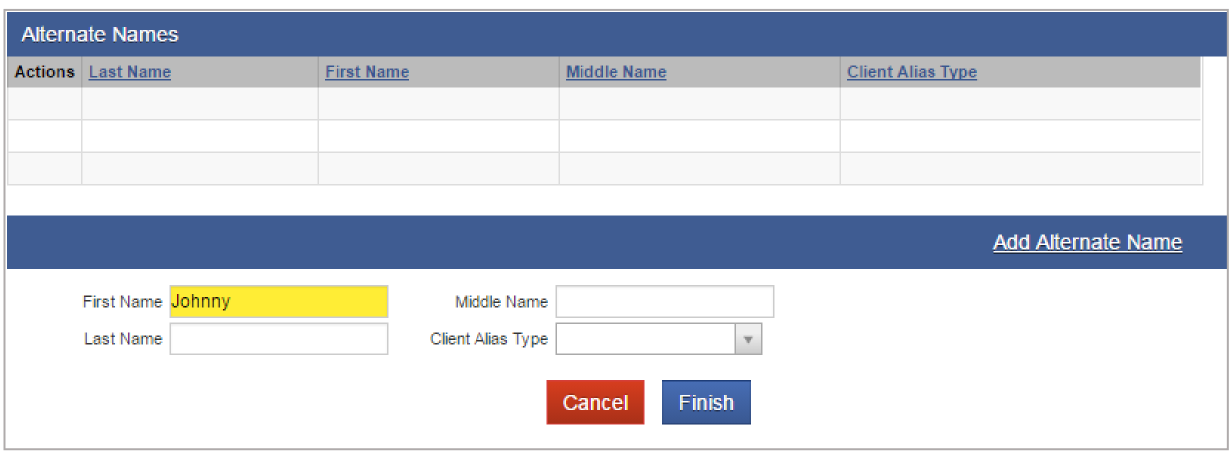
The client's nickname or street name may be entered on this screen

Tip: Alternative names can also be used to search for the client's profile in the future. On the Client Search screen, type the client's alternative name in the First Name and/or Last Name fields.

6. On the Alternate Names screen, click **Add Alternate Name**, and the bottom half of the screen becomes editable.



7. Complete at least the **First Name** field.



8. Click **Finish**. The name will now appear in the list at the top of the screen.

9. From the Alternate Names screen, click the **right-arrow** button to open the **Additional Information** screen.

Additional Information

10. On the **Additional Information** screen, complete the light-yellow fields.

Table 2-2: Additional Information screen

Field	Description
Ethnicity	Select from the drop-down list.
Selected Races	Select one or more races.
Veteran Status	Select from the drop-down list.

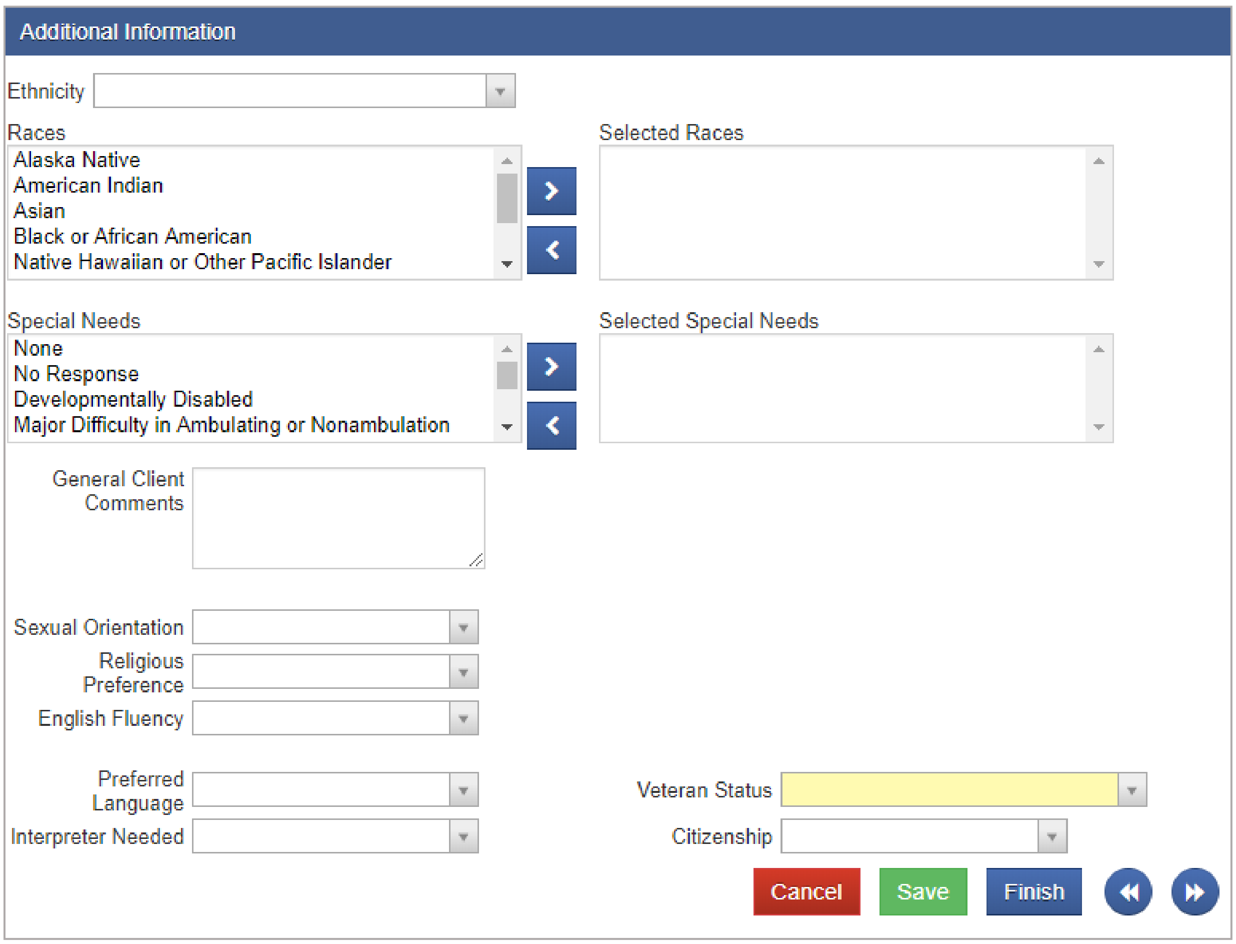
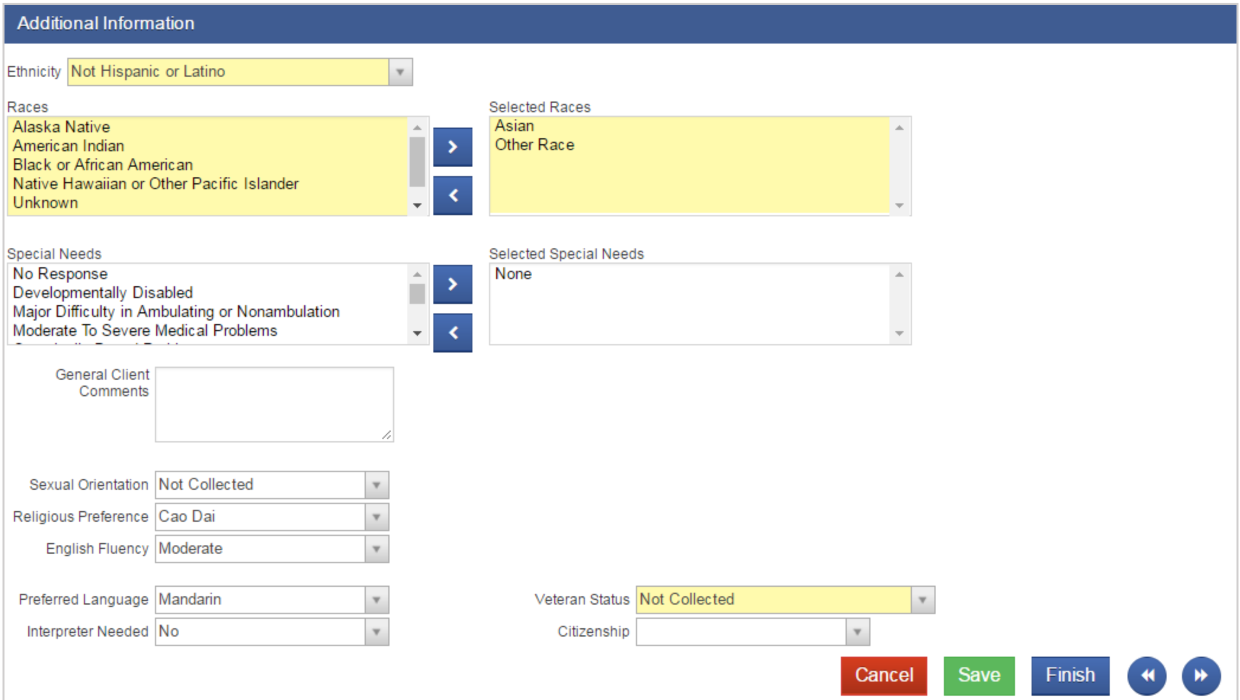


Figure 2-4: Standard SOR screen



11. When complete, click **Save**, then click the **right-arrow** button to open the **Contact Info** screen.

Contact Info

Tip: Enter the client's contact information on this screen to help locate the client for follow-ups.

12. On the **Contact Info** screen, a phone number can be entered for the client.

13. To enter an address, click **Add Address**. This will open the Address Information screen.

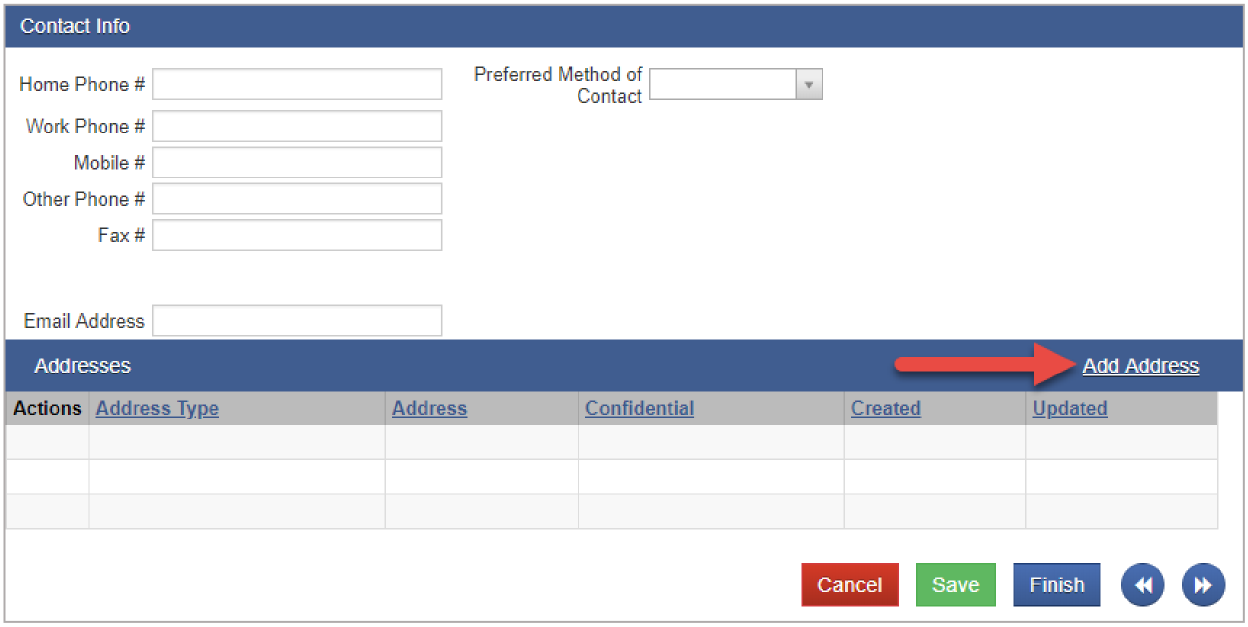


Figure 2-5: Contact Info screen

14. Enter the client's Address Type, Address line 1, City, State, and Zip Code.

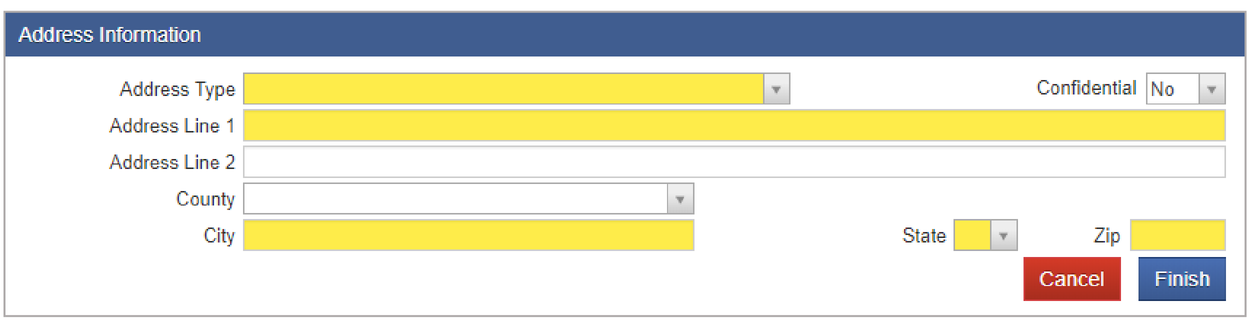


Figure 2-6: Address Information screen

15. When complete, click **Finish**, and the client's address information will show up on the Contact Info screen. You may enter several addresses for a client. If a client has a new address, update the Address Type of the current address record to "Previous", then create a new address.

16. From the **Contact Info** screen, click the **right-arrow** button to open the **Collateral Contacts** screen.

Collateral Contacts

Tip: Enter any collateral contacts for the client on this screen to help locate the client for follow-ups.

17. On the **Collateral Contacts** screen, click the **Add Contact** link.

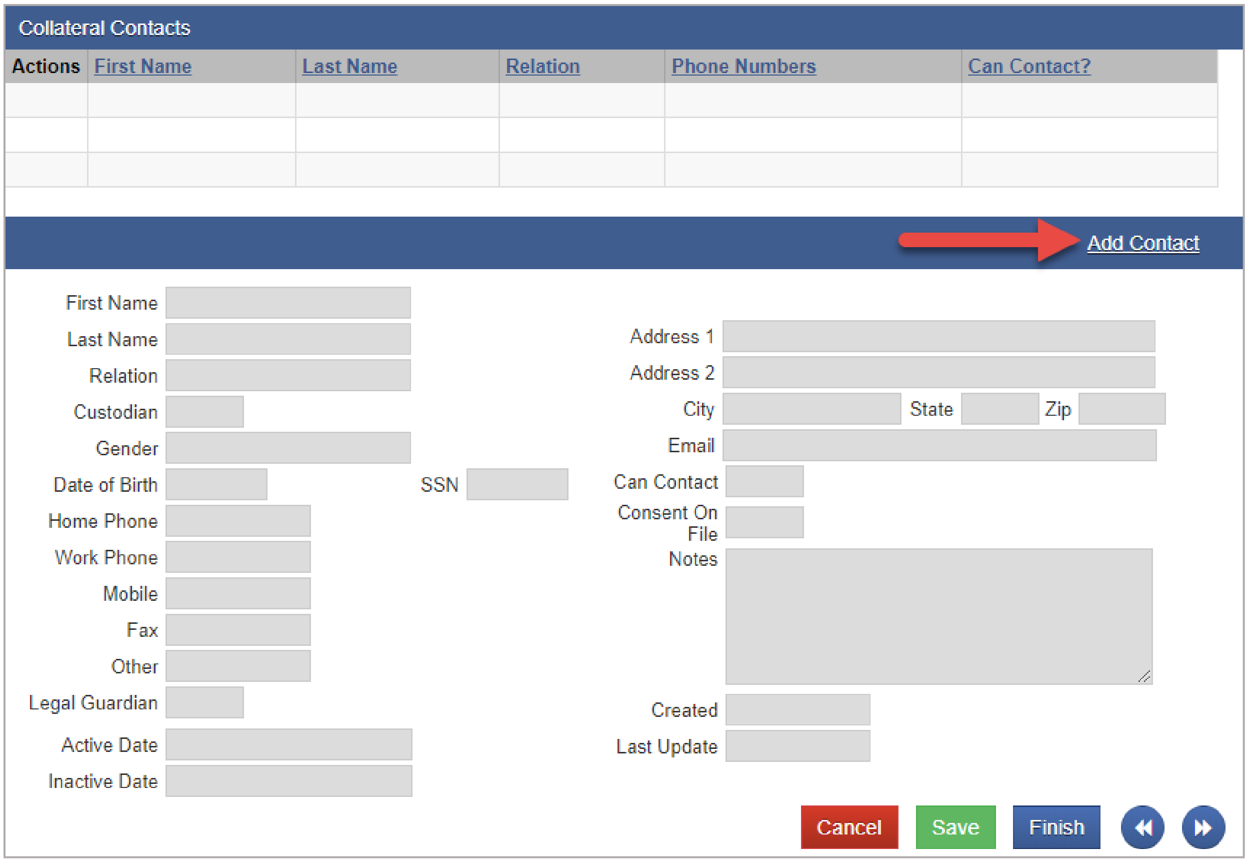


Figure 2-7: Collateral Contacts screen, click Add Contact

18. Enter the required client information. See the table below for information on the required fields.

Table 2-3: Collateral Contacts required fields

Field	Description
First Name	Type the contact's first name.
Last Name	Type the contact's last name.
Relation	Select the collateral contact's relation to the client from the drop-down menu.
Address, **City**, **State**	Type the contact's address information
Can Contact	Select Yes or No.
Consent On File	Select Yes or No.

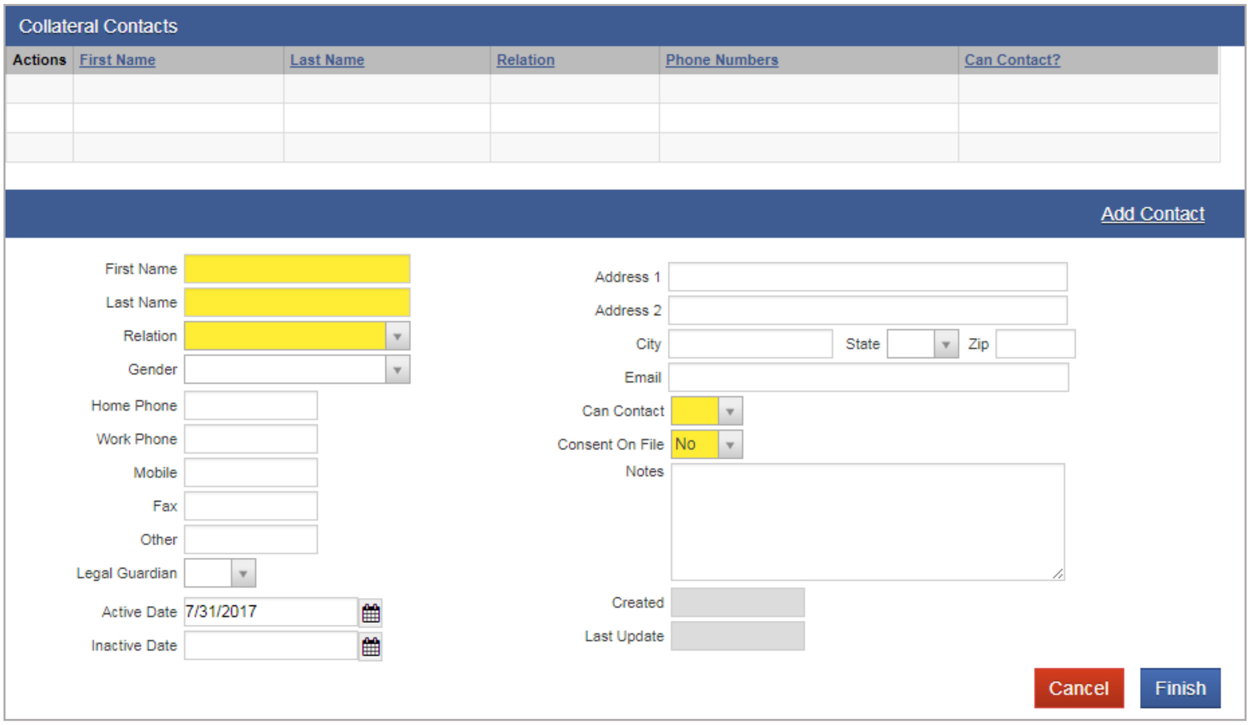


Figure 2-8: Add Collateral Contacts screen

19. When complete, click **Finish**. The collateral contact name(s) will be displayed in the list section of the screen.

20. From the **Collateral Contacts** screen, click the **right-arrow** button to open the **Other Numbers** screen.

Other Numbers

In this section, users can add additional identifying numbers for a client, such as a court case number.

21. On the **Other Numbers** screen, click the **Add Other Number** link. The bottom half of the screen now becomes editable.

22. Fill in information such as, Number Type, Number, Relation, and Address of the contact.

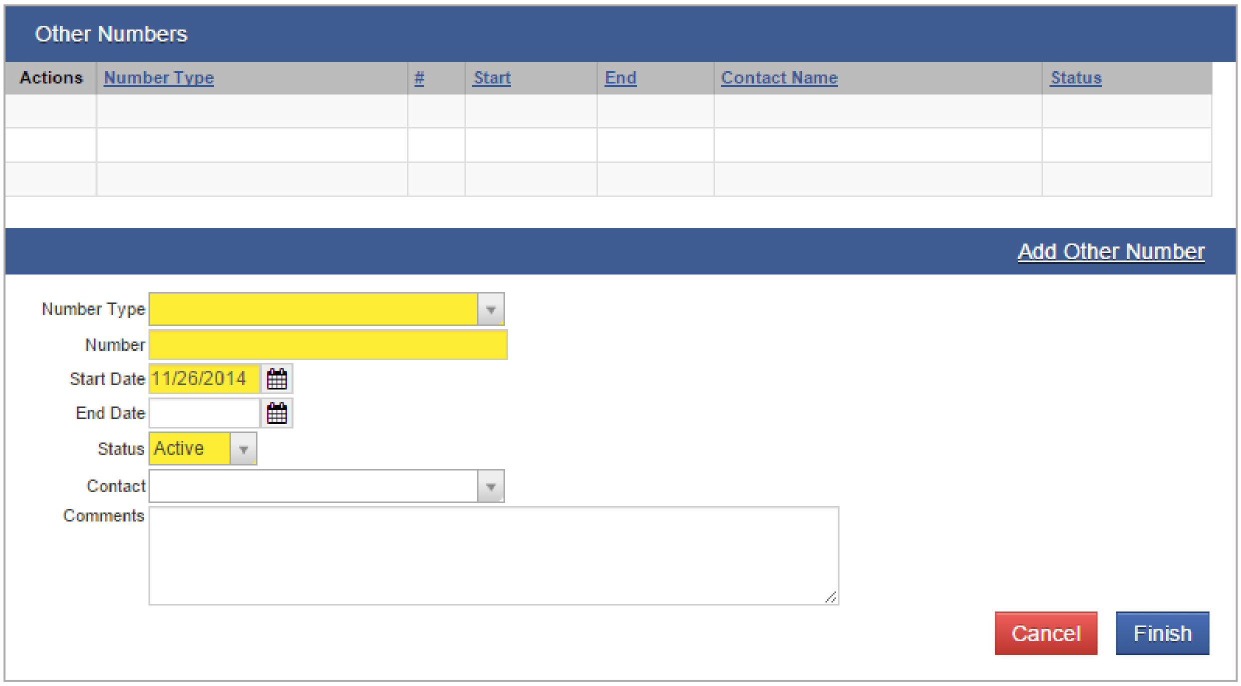


Figure 2-9: Other Numbers screen

23. The **Contact** dropdown box will display the names of any saved Collateral Contacts from the previous screen. If the name of the Collateral Contact is not present, click on the **Collateral Contacts** screen to add a new record.

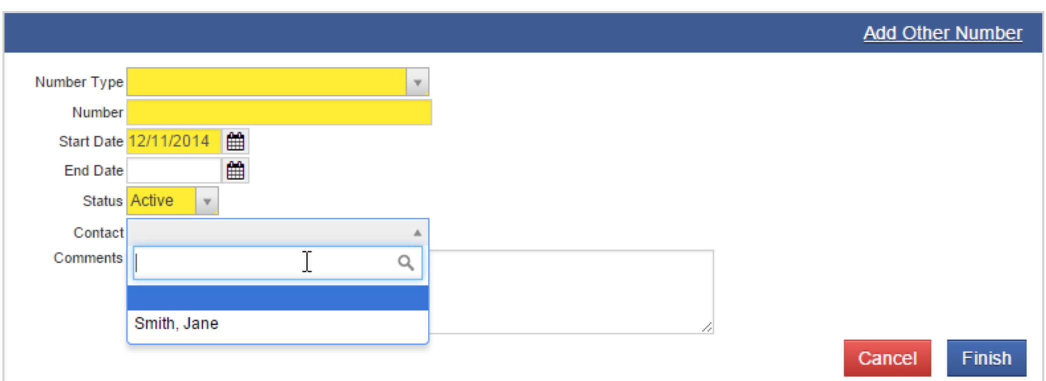


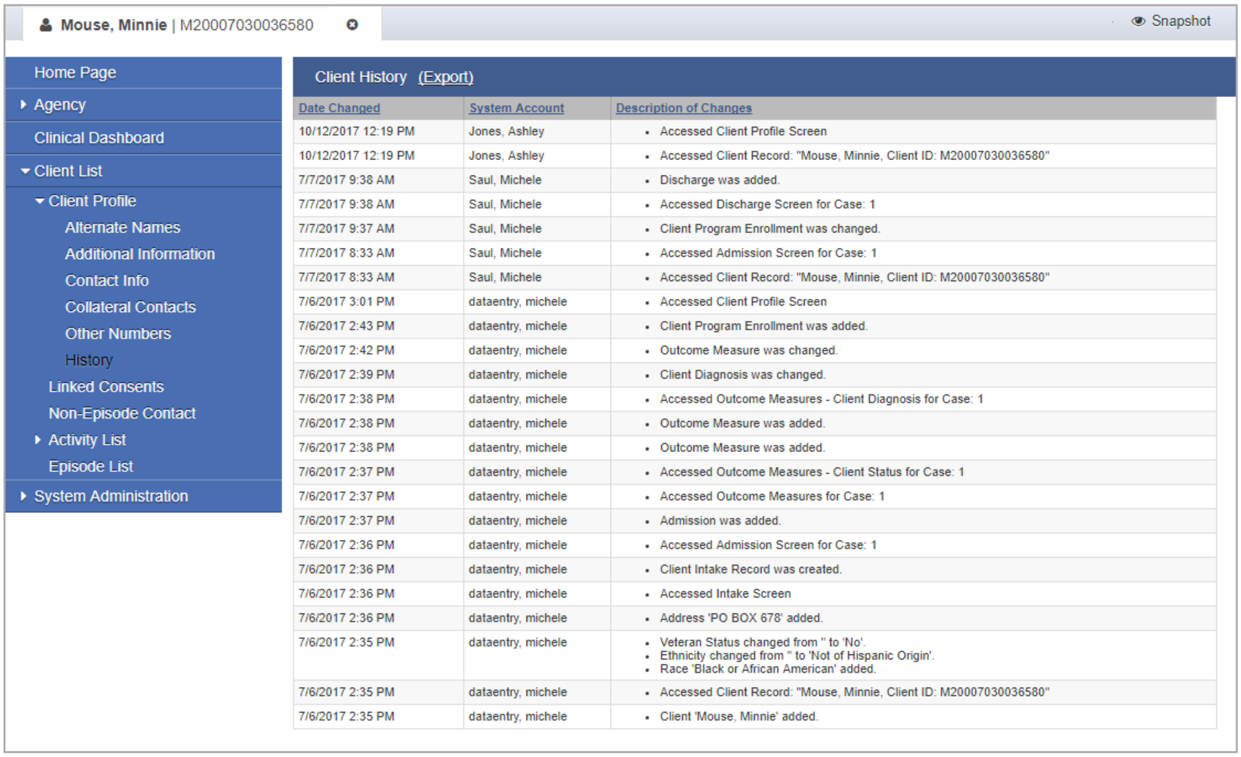
Figure 2-10: Other Numbers screen, saved collateral contact

24. When complete, click **Finish**. The names now show up in the table on top of the screen.

25. Click **Finish** again, and you are redirected to the **Client Search** screen.

History

The **History** sub-menu displays a list of all changes that have been made to the client information as well as any access to this client's record. It lists the date, the staff person, and a description of the access or change.



Date Changed	System Account	Description of Changes
10/12/2017 12:19 PM	Jones, Ashley	• Accessed Client Profile Screen
10/12/2017 12:19 PM	Jones, Ashley	• Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"
7/7/2017 9:38 AM	Saul, Michele	• Discharge was added.
7/7/2017 9:38 AM	Saul, Michele	• Accessed Discharge Screen for Case: 1
7/7/2017 9:37 AM	Saul, Michele	• Client Program Enrollment was changed.
7/7/2017 8:33 AM	Saul, Michele	• Accessed Admission Screen for Case: 1
7/7/2017 8:33 AM	Saul, Michele	• Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"
7/6/2017 3:01 PM	dataentry, michele	• Accessed Client Profile Screen
7/6/2017 2:43 PM	dataentry, michele	• Client Program Enrollment was added.
7/6/2017 2:42 PM	dataentry, michele	• Outcome Measure was changed.
7/6/2017 2:39 PM	dataentry, michele	• Client Diagnosis was changed.
7/6/2017 2:38 PM	dataentry, michele	• Accessed Outcome Measures - Client Diagnosis for Case: 1
7/6/2017 2:38 PM	dataentry, michele	• Outcome Measure was added.
7/6/2017 2:38 PM	dataentry, michele	• Outcome Measure was added.
7/6/2017 2:37 PM	dataentry, michele	• Accessed Outcome Measures - Client Status for Case: 1
7/6/2017 2:37 PM	dataentry, michele	• Accessed Outcome Measures for Case: 1
7/6/2017 2:37 PM	dataentry, michele	• Admission was added.
7/6/2017 2:36 PM	dataentry, michele	• Accessed Admission Screen for Case: 1
7/6/2017 2:36 PM	dataentry, michele	• Client Intake Record was created.
7/6/2017 2:36 PM	dataentry, michele	• Accessed Intake Screen
7/6/2017 2:36 PM	dataentry, michele	• Address 'PO BOX 678' added.
7/6/2017 2:35 PM	dataentry, michele	• Veteran Status changed from '' to 'No'. • Ethnicity changed from '' to 'Not of Hispanic Origin'. • Race 'Black or African American' added.
7/6/2017 2:35 PM	dataentry, michele	• Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"
7/6/2017 2:35 PM	dataentry, michele	• Client 'Mouse, Minnie' added.

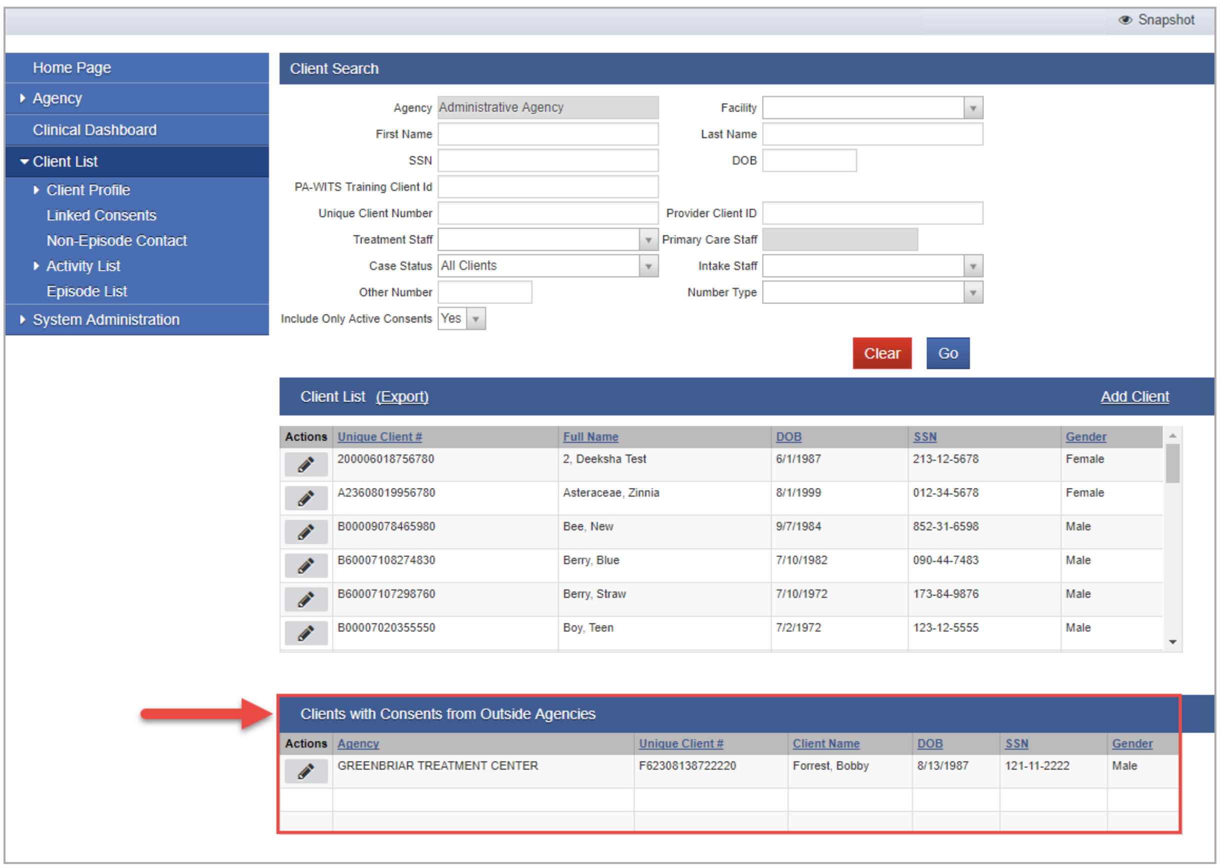
Figure 2-11: Client History screen

Linked Consents

Where: Client List > Clients with Consents from Outside Agencies

Each time another agency consents client information to your agency, a row will be displayed on the "**Clients with Consents from Outside Agencies**" section of the **Client List** screen. Always look at the linked consents first to make sure you don't already have that client entered.

If the consent is sent along with a referral and the referral is accepted at the referred to agency, users with a Clinical Supervisor role may manually link and unlink consents. This action is available when it is clear that a client with consented information is in fact the same person as a client that exists in the agency. They may not have been automatically linked because the names or other identifying information may have been different in the sending agency than they are in the receiving agency.



For example:

A client named "Bobby" is referred into your agency from an outside agency. Your agency already has a record for a client named "Robert". The Linked Consents screen allows you to compare the New/Referred Client Information (Bobby) with the Existing Client Information (Robert). Using this screen, you can tell that Robert and Bobby are the same person and these two profiles can be linked together so the same client won't have two different client profiles within the same agency.

Link to Consented Client

1. On the left menu, click **Client List** and then click **Go**.

2. In the **Clients with Consents from Outside Agencies** section, hover over the Actions column and click **Link**.

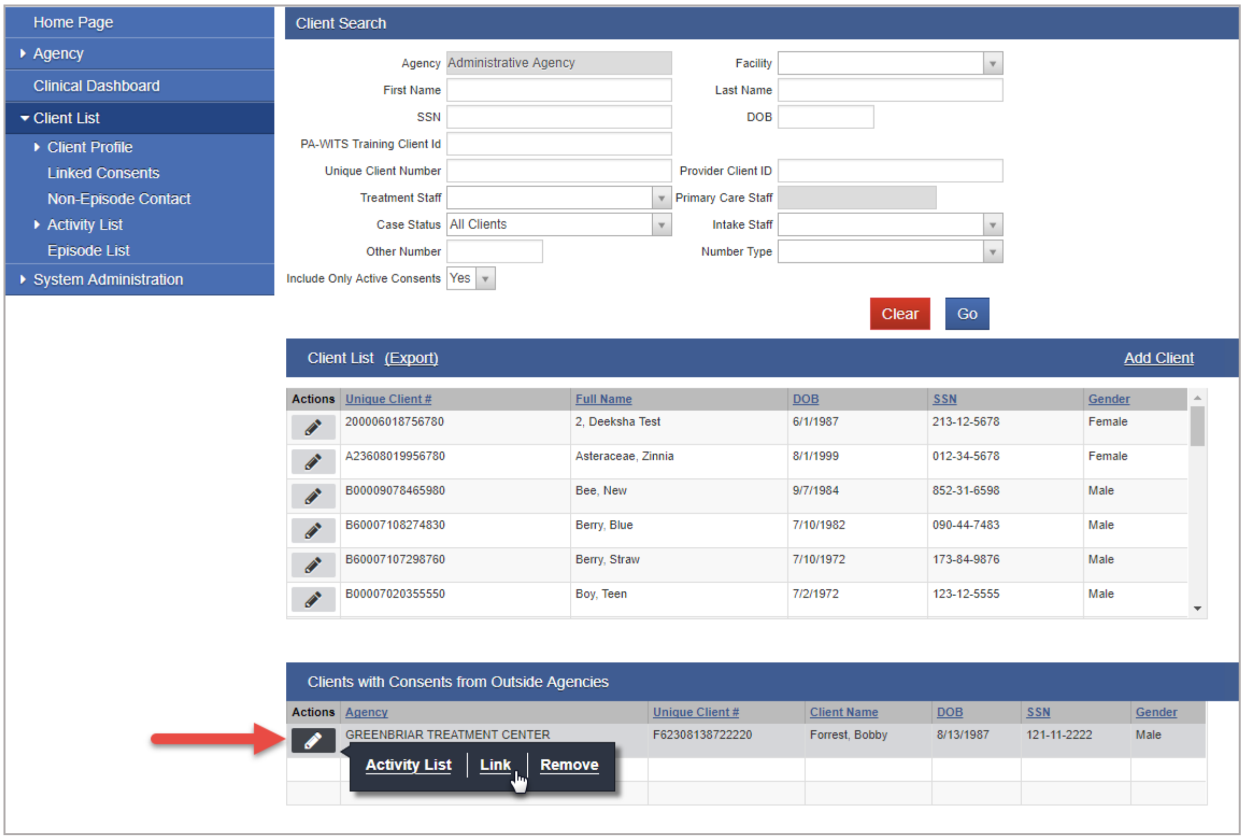


Figure 2-12: Client List screen, Clients with Consents from Outside Agencies section, Link action item

3. The **Link Client Search** screen will appear and the Consented Client information is displayed as read-only fields.

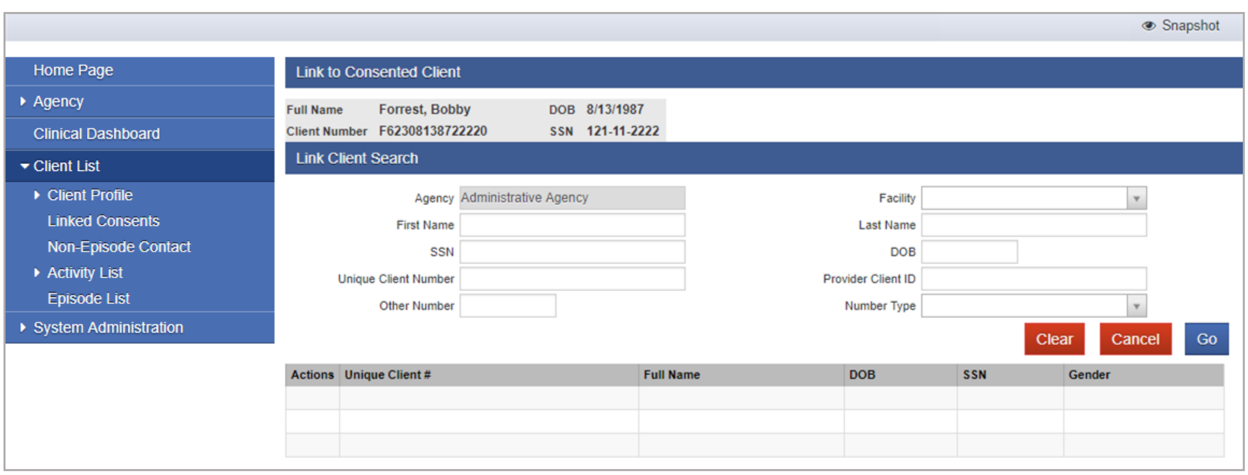


Figure 2-13: Link Client Search screen

4. Use the search fields to find a client with similar information. It is helpful to copy and paste some of the consented client's information into the search fields. The example in Figure 2-14 uses the Consented Client's Unique Client Number in the search field.

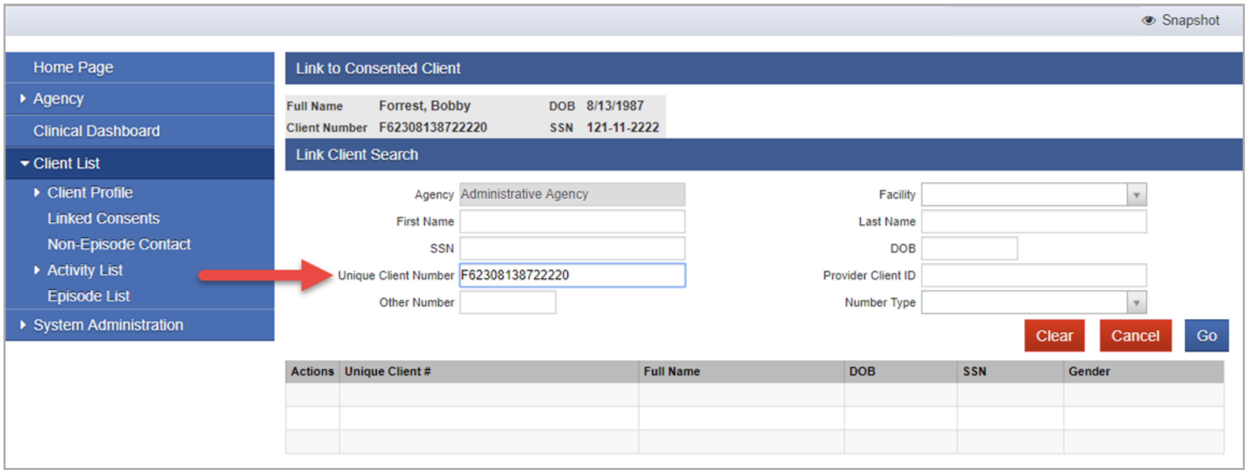


Figure 2-14: Link Client Search screen, search by Unique Client Number

5. After filling out one or more search fields, click **Go** and then review the search results.

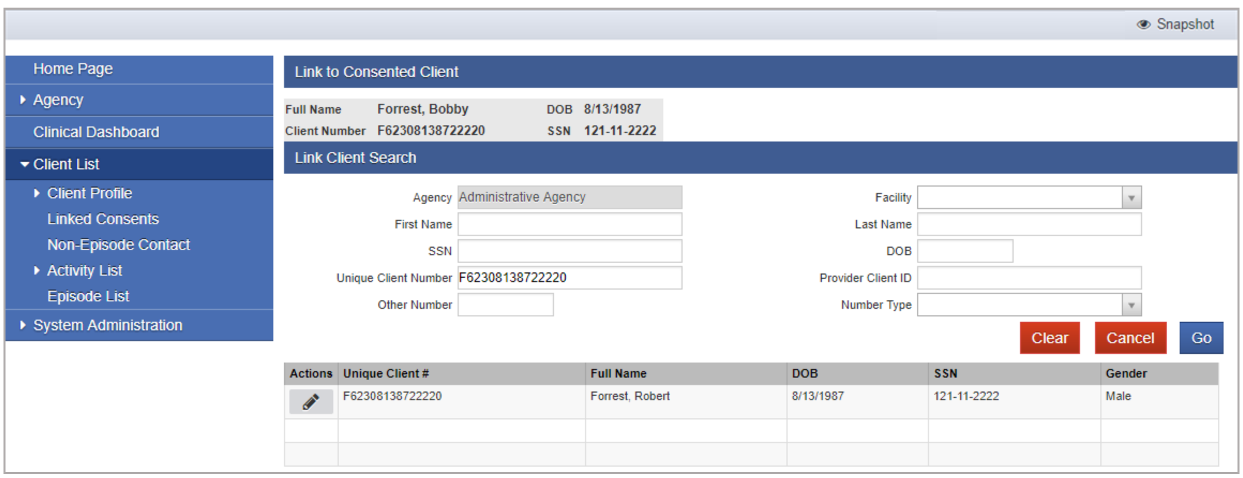


Figure 2-15: Link Client Search screen with search results

6. If the information in the search results matches the Consented Client information, hover over the Actions column and then click **Link**.

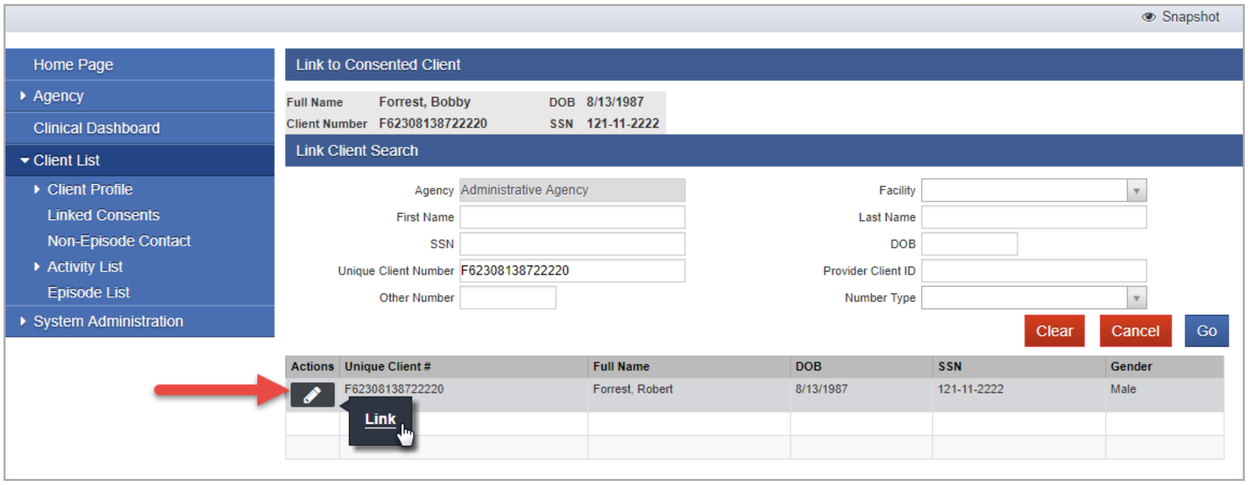


Figure 2-16: Link Client Search screen, Link Consent record

7. Click **Yes**.

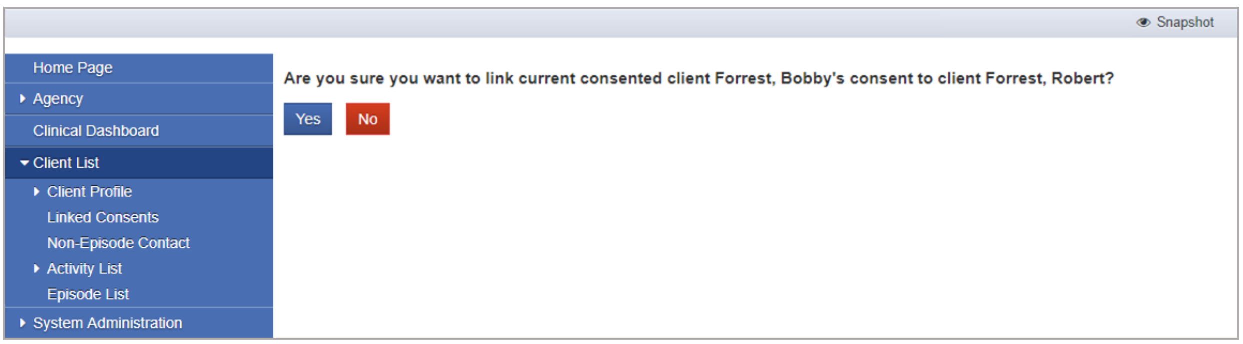


Figure 2-17: Are you sure you want to link current consented client to the consent client

8. The client's Linked Consent screen will now display the consent record from the other agency.

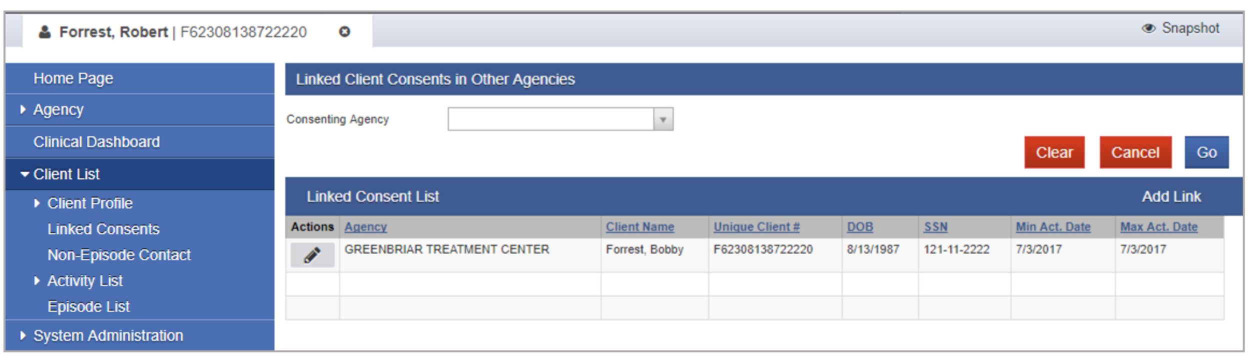


Figure 2-18: Linked Consents screen

Part 3: Client Intake and Program Enrollment

Client Activity List

It is important to understand that data collection in WITS happens within a Client's Activity List. The Case, or Episode of Care, is the container that holds all client activities. The beginning and end of a client's Episode of Care are recorded on the Intake transaction, where the Intake Date starts the Episode and the Intake Date Closed marks the end of the Episode (these fields are shown in *Figure 3-6: Intake Case Information screen* on page 25).

The concept diagram below illustrates how this data collection is structured within the client Activity List. This Activity List is comprised of two (2) primary nested containers: Episode (e.g., Case, or Intake), and Program. The double lines connecting the Program container represent multiple program enrollments, which are allowed within a single Episode. In the diagram, arrows denote the sequence of progressing through each container.

When an Episode of Care ends for a client, this signifies that the client is no longer receiving services. It's possible for that client to return at a future date.

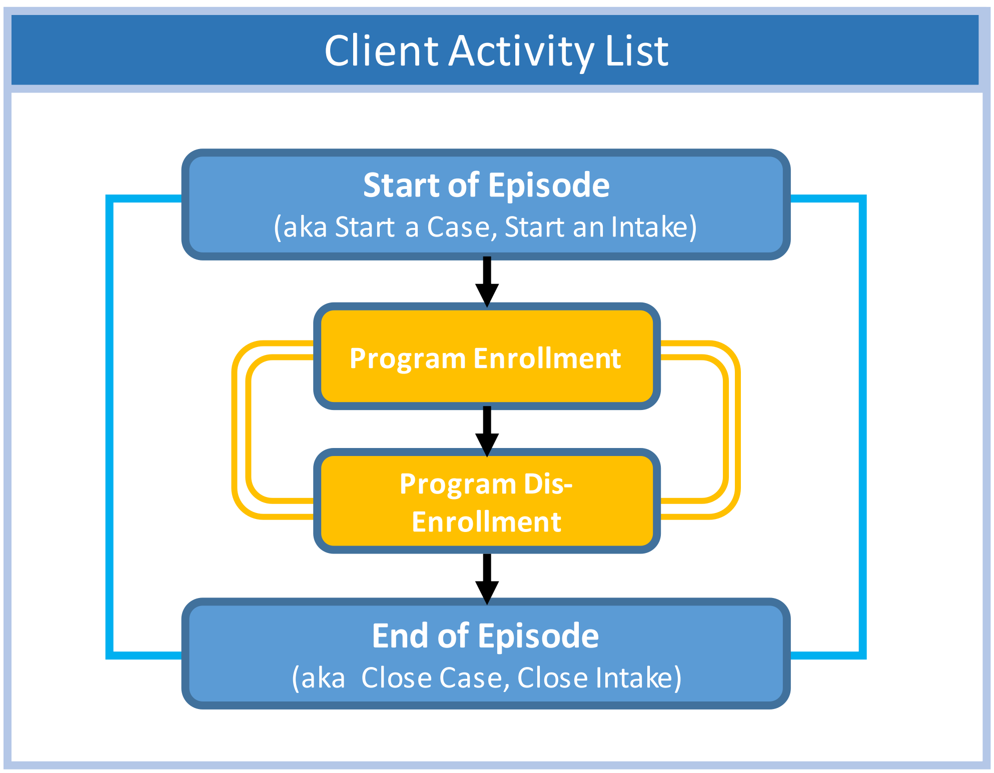


Figure 3-1: Concept Diagram of Data Collection Structure within Client Activity List

The **Client Activity List** can serve as a "dashboard' view for information that has been collected for a given client within an Episode. Each Activity on the Activity List has a status to help the end user determine if that activity is "Complete" or "In Progress". When an activity is "In Progress", a **Details** link is available which displays the information needed to complete the activity.

Certain client activities must be complete before you can proceed to a following activity. Validation rules will guide you throughout the workflow as you enter new data.

> To access items within the Activity List, a client must be selected first.

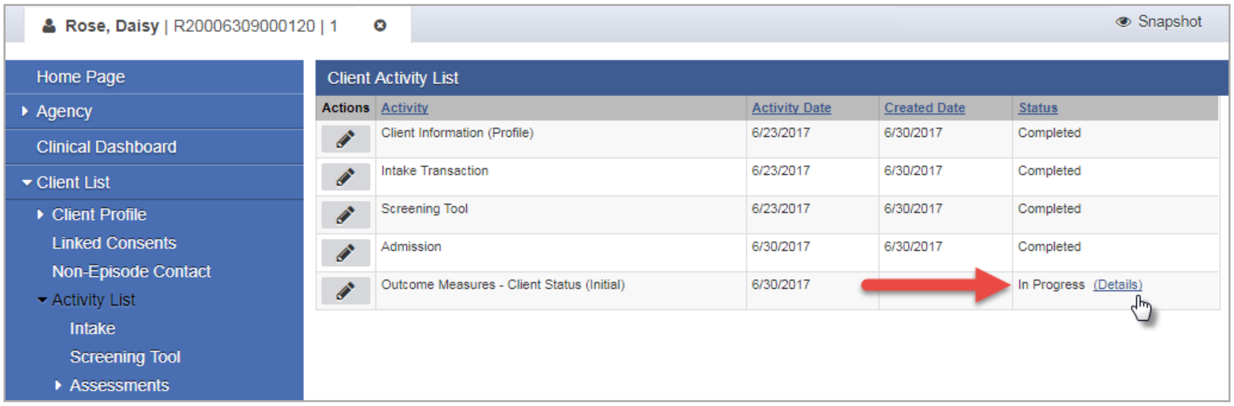


Figure 3-2: Client Activity List, Details link

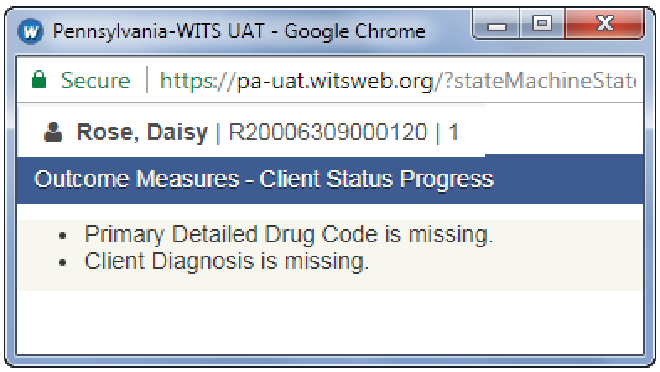


Figure 3-3: Details link, list of missing information

Some Client Activities do not have a concept of being complete. For those activities, the Status will be listed as Not Applicable.

Start New Episode (New Clients)

Where:* *Client List* > *Activity List* > *Episode List

In WITS, all items located in a client's Activity List are based upon an active Episode of Care. In the screen capture below, note the Activity List in the left menu only displays one item, "Episode List". An episode must be created before accessing other items in the client's Activity List.

To start a new episode of care for a client, follow the steps below.

1. On the left menu, click **Episode List**.
2. Click the **Start New Episode** link.

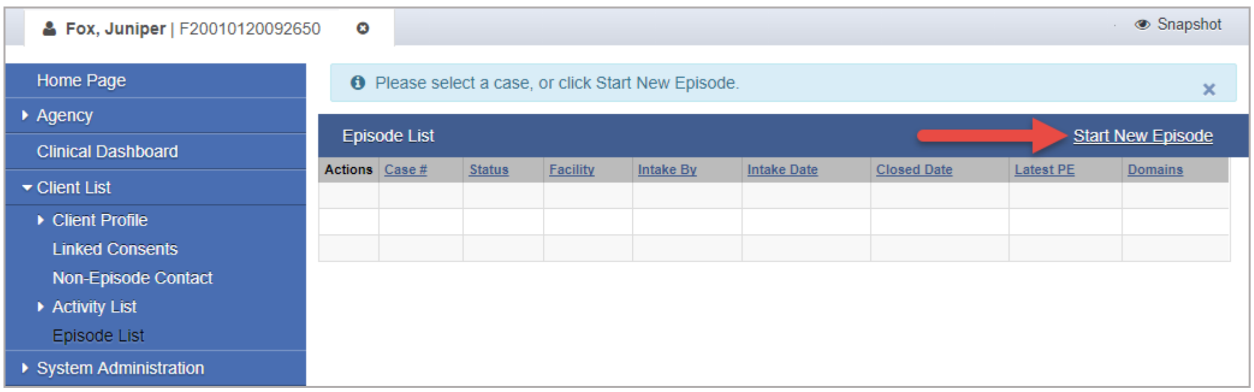


Figure 3-4: Episode List screen, Start New Episode link

If the client profile is missing certain information, such as an Address or fields on the Additional Information screen, a New Episode cannot be created and an error message will appear, as shown in Figure 3-5.

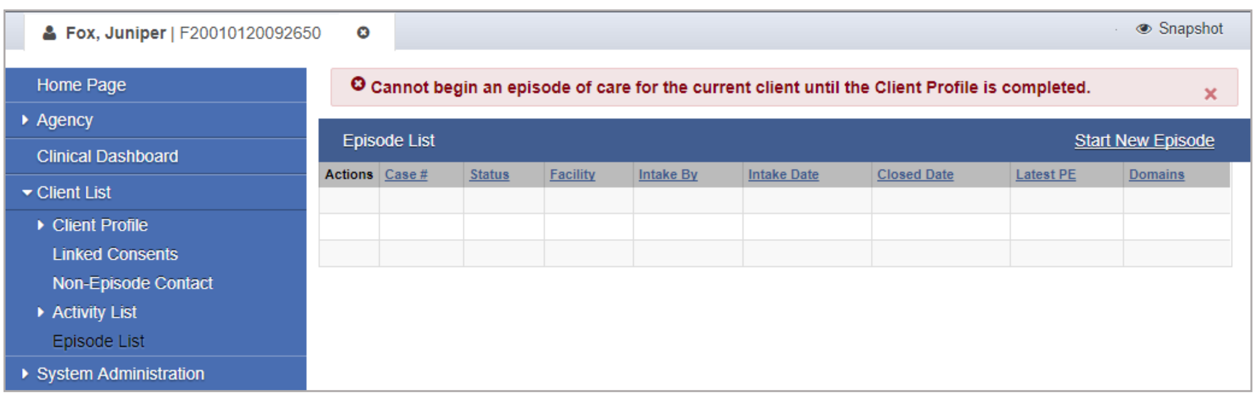


Figure 3-5: Episode List screen, Error Message

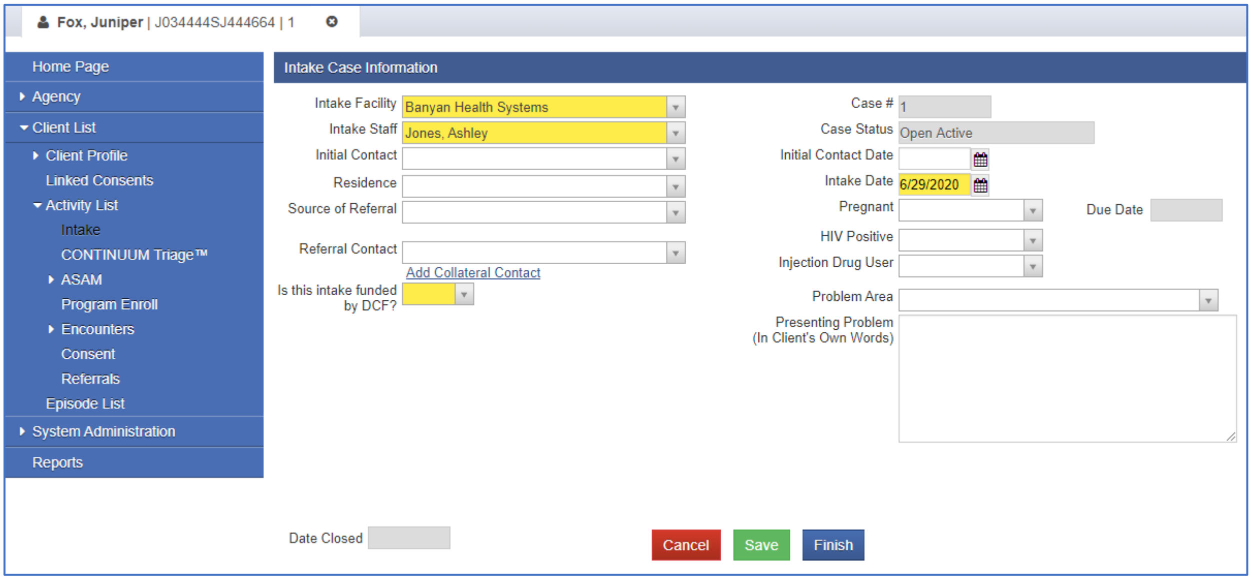
If the client profile is complete, clicking **Start New Episode** will open the **Intake Case Information** screen, as shown in Figure 3-6: Intake Case Information screen.

(Continue to next section)

Intake

***Where:* Client List > Activity List > Intake**

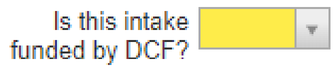
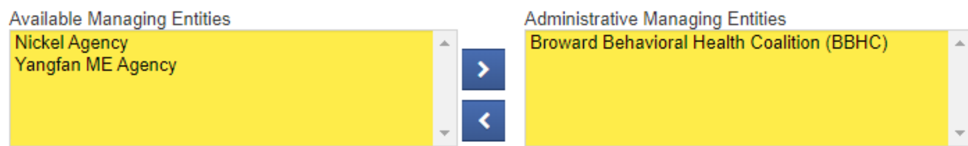
Once an episode of care has been created (see above section) the system will display the Intake Case Information screen.



1. On the Intake Case Information screen, complete the fields as shown in the table below.

Table 3-1: Intake Case Information Fields

Field	Description
Intake Facility	Pre-populates with the current facility location.
Intake Staff	Pre-populates with the current staff member name.
Initial Contact	Select from the drop-down list.
Case Status	Defaults to "Open Active".
Initial Contact Date	The date when the Client first reached out for treatment.
Intake Date	Enter the client's intake date, (which also marks the beginning of the client's Episode).
Residence	Select from the drop-down list.
Source of Referral	Select from the drop-down list.
Referral Contact	(Optional) Select from a list of the client's collateral contacts.
Pregnant	Is the client pregnant at the time of admission? Complete if applicable.
HIV Positive	(Optional)
Injection Drug User	Select Yes or No.
Problem Area	(Optional)
Presenting Problem (In Client's Own Words)	(Optional)

Field	Description
Is this intake funded by DCF?	Select Yes or No. If 'Yes' is selected, the multiselect field, "Available Managing Entities" becomes available. 
Available Managing Entities	If this intake is funded by DCF ('Yes' was selected on the field, "Is this intake funded by DCF?"), this mover box will appear. Choose from the list of **Available Managing Entities** and move the ME to the **Administraive Managing Entities** box using the mover buttons. **Note**: This list is filtered based on the ME-Provider relationships that have been set up on the Agency Profile. 
Date Closed	The Date Closed field is used to mark the end of the client's Episode. 

Note to Florida on ME/Provider Changes: In the case where an ME is already selected as the Administrative ME of a Provider's Intake, and the ME no longer administers the Provider (the Provider has been de-selected from the ME's Direct Service Provider list on Agency Profile), the ME will remain as the Intake's Administrative ME, unless a user de-selects this ME from the Intake profile.

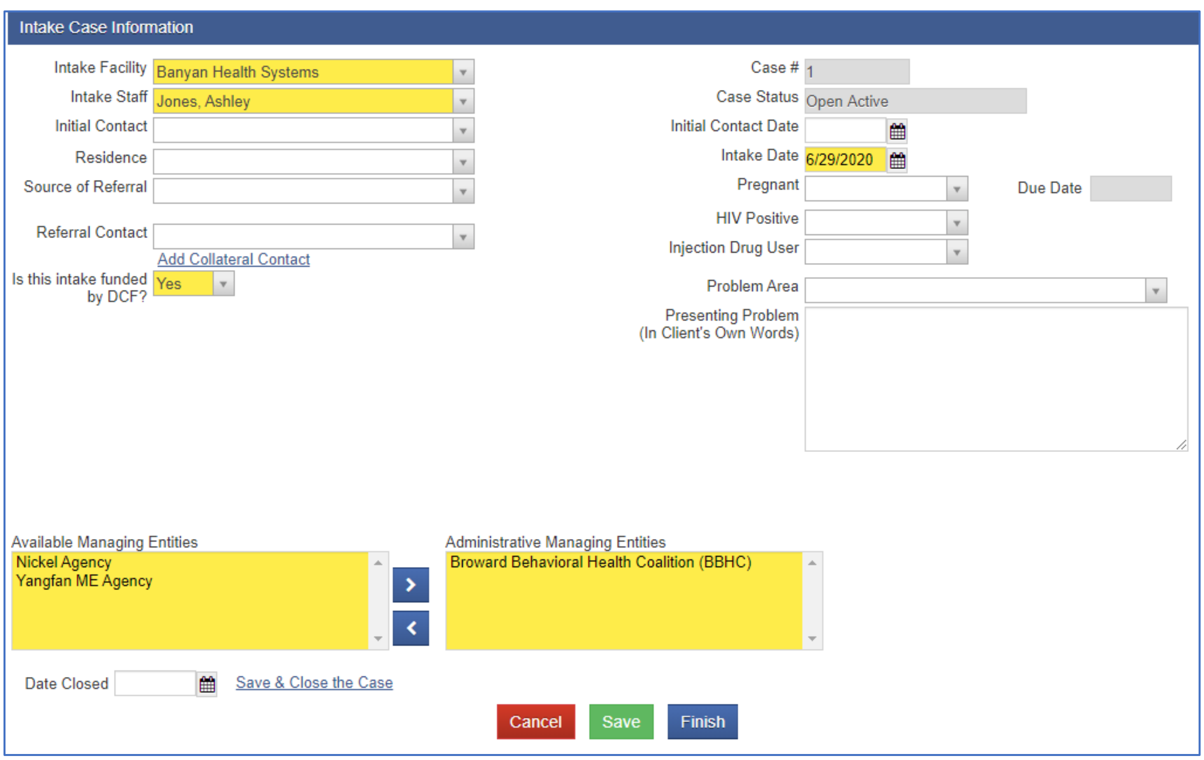


Figure 3-6: Intake Case Information screen

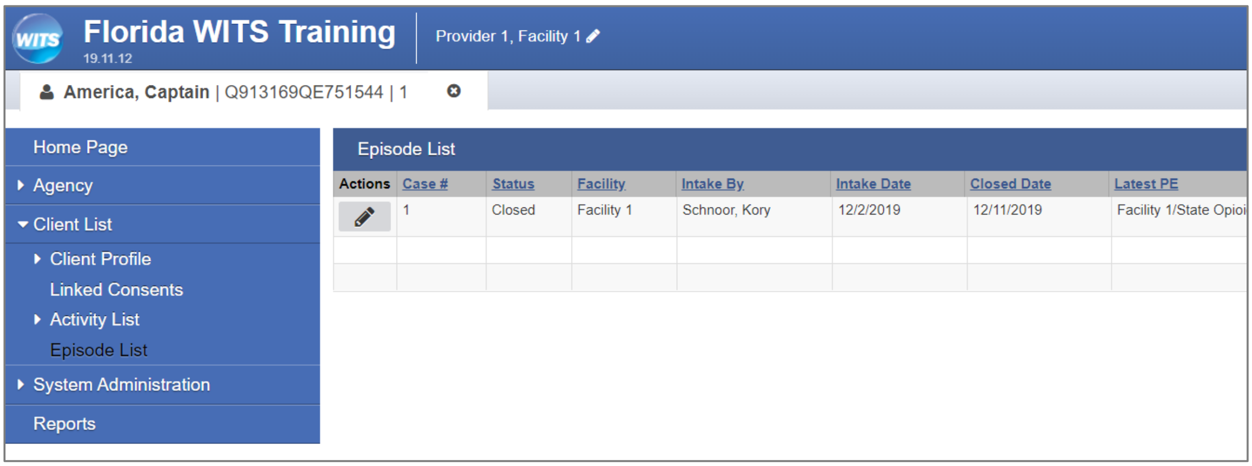
3. Click **Finish**.

Re-Open Intake

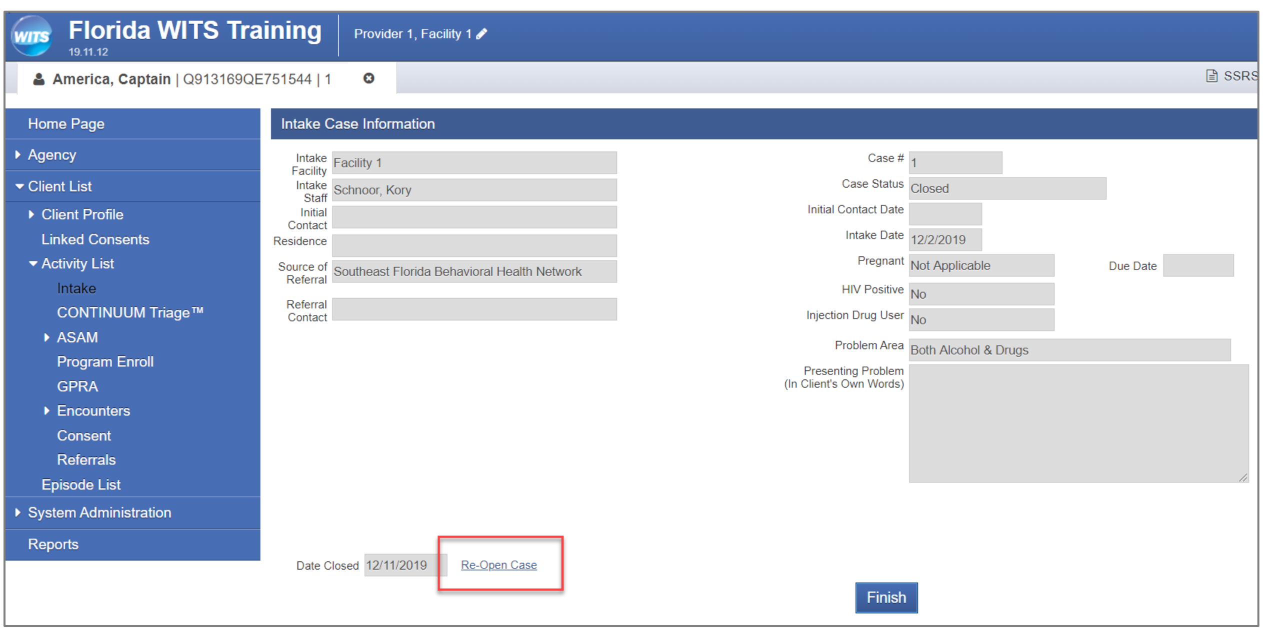
***Where:* Client List > Activity List > Intake**

Once an episode of care has been closed (after the client completes the SOR grant or is administratively discharged), if needed for a client, the episode can be re-opened. Users must have the "Case ReOpen" role on their staff account in order to re-open the episode/intake.

1. Using the Client List, find the client which needs to have the episode re-opened and access their Client Profile.
2. On the navigation menu, click on **Episode List**.
3. To view the closed Episode, click on **Review**.



4. On the Intake Case Information screen, click **Re-Open Case**. If you do not see "Re-Open Case" then you do not have the Case ReOpen role.



Program Enroll

Where:* *Client List > Activity List > Program Enroll

Once an Intake has been created (see above section), complete the client's program enrollment.

1. On the left menu, click **Program Enroll**.
2. Click the **Add Enrollment** link.

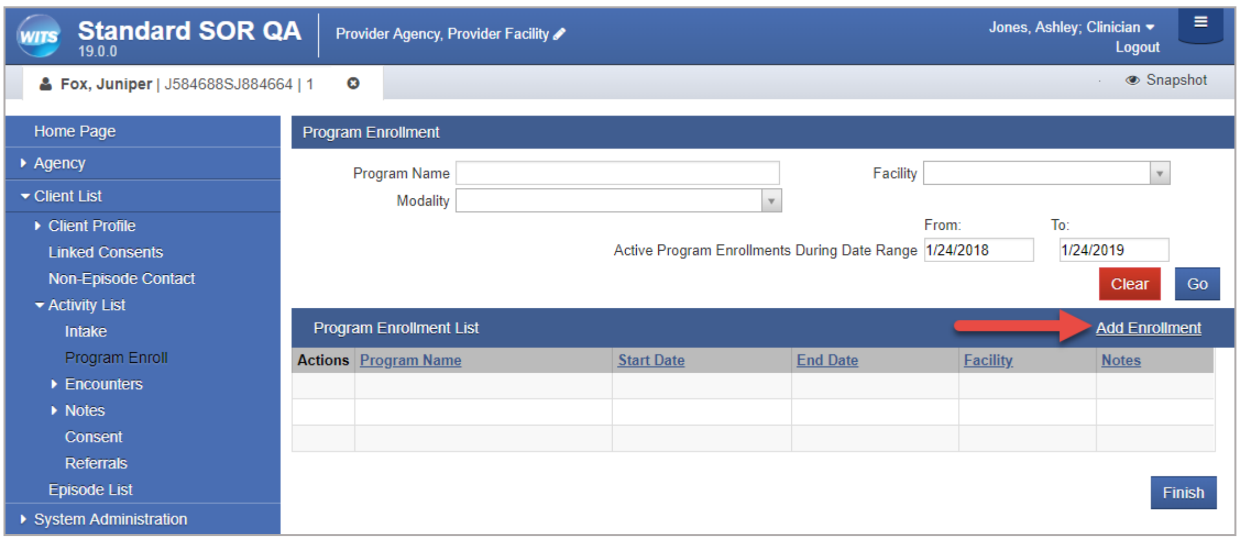


Figure 3-7: Program Enrollment screen

3. Complete fields on the Program Enrollment Profile.

Table 3-2: Program Enrollment Profile fields

Field	Description
Facility	Defaults to the current Facility name.
Program Name	Select the appropriate program for the client
Program Staff	Pre-populates with the current staff member name.
Start Date	Defaults to the current date.
Days on Wait List (TEDS Only)	Type the number of days.
Reason for waiting? (TEDS Only)	If the client had to wait longer than two weeks to access the recommended level of care, select the reason from the drop-down list. This field will be required if: • The program enrollment start date is more than 14 days from the most recent ASAM or Placement Summary date. • The LOC associated with the program is different than the Recommended LOC of the most recent ASAM or Placement Summary (consented or client activity).
Notes	Type any notes as needed.

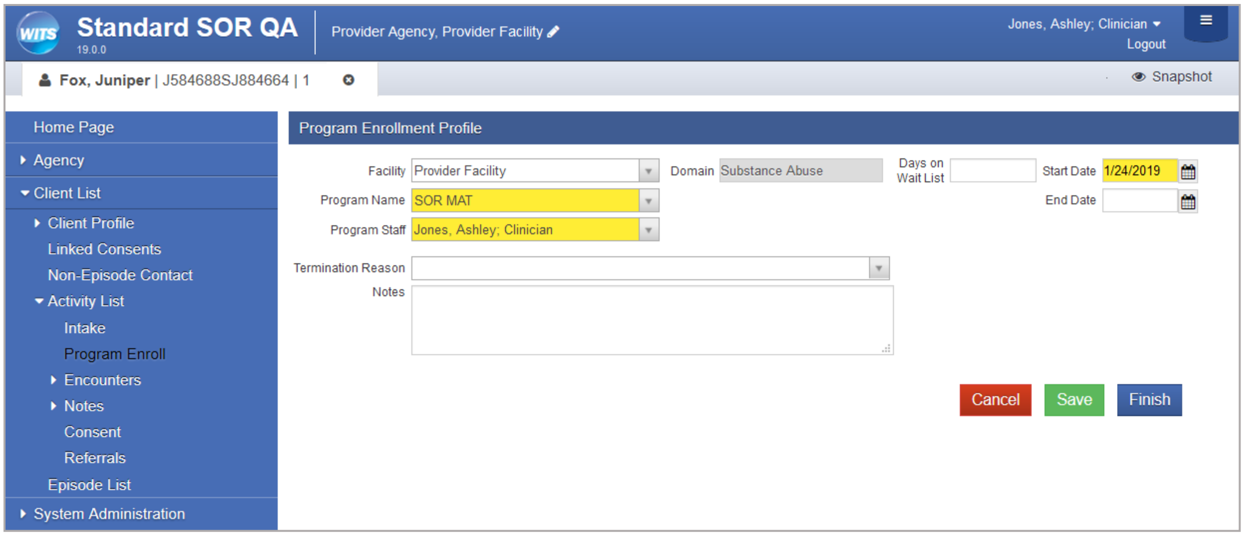


Figure 3-8: Program Enrollment Profile screen

4. Click **Finish**.

5. On the Program Enrollment screen, click **Finish**.

Part 4: GPRA Interviews

***Where:* Client List > Activity List > GPRA**

To access the GPRA section in WITS, select a client from the Client List and then view the client's Activity List. The GPRA section displays a list of previously entered GPRA interviews (at that agency) and includes link(s) to add a new interview record. For previously entered GPRA interviews, available actions include, View, Edit, and Delete, which are described below in *Table 4-1: Available Actions for GPRA Interviews*.

Important: The GPRA menu item will only appear if:

1. The staff member completing the GPRA interview has been assigned the following role, "GPRA (Full Access)". This role is assigned by your WITS or agency administrator.
2. The GPRA interview is being done for a client who is enrolled in a WITS program associated with the SOR grant. Your WITS administrator should advise you as to which of your agencies' programs are associated with the SOR grant.

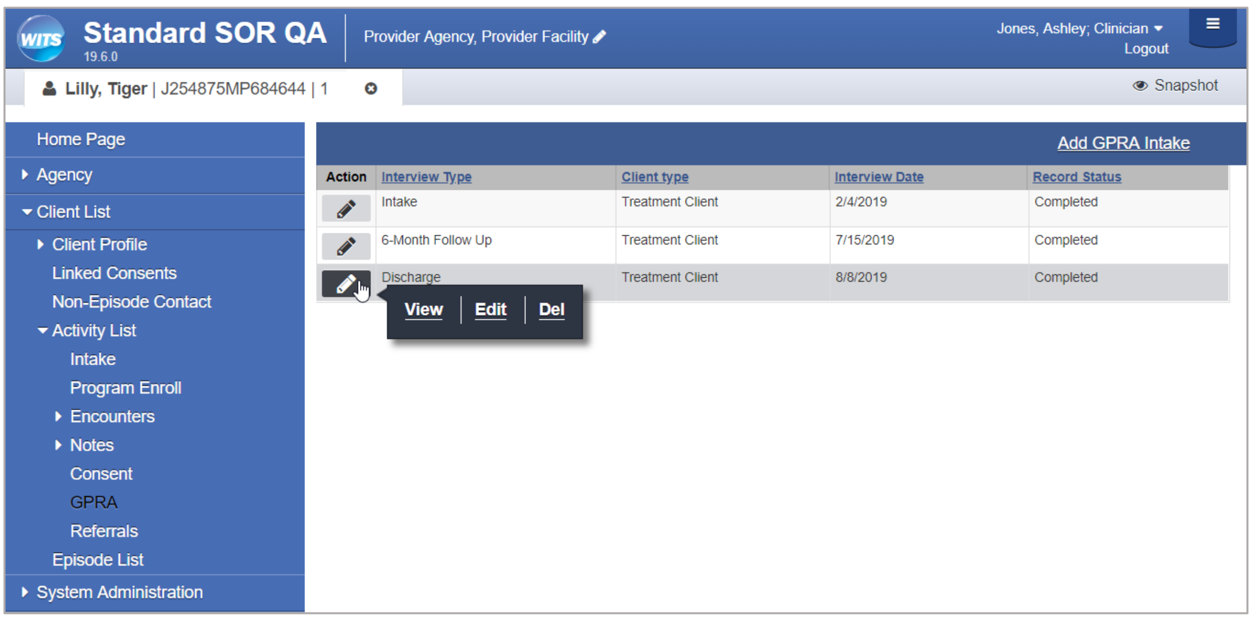
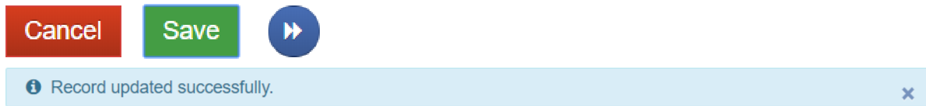
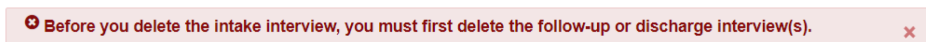


Figure 4-1: GPRA Menu displaying previously entered GPRA Interviews with Actions

Tip: Depending on the existing interview record(s), the choice of adding a GPRA Follow up or a GPRA Discharge is available. The first GPRA Interview that can be added is the GPRA Intake.

Table 4-1: Available Actions for GPRA Interviews

Action	Description
View	Opens the interview in read-only mode.

Action	Description
Edit	Opens the interview in edit mode, where certain fields can be updated. A Save button is available on screen, and when clicked, an information message will appear stating that the record has been successfully updated. 
Delete	A confirmation screen will appear, prompting the user to select 'Yes' or 'No' to continue with deleting the record.  If a client has follow-up or discharge interview(s), those interviews must be deleted before the intake interview can be deleted. 

Completing Interviews

Action Buttons

GPRA Interviews must be completed in one session and all questions must be answered to save the record. Clicking **Cancel** will cancel adding the GPRA interview. Users progress through the interview by completing the required fields on screen and then clicking the **right-arrow** button to move to the next set of questions. Each field must be completed before moving to the next screen.

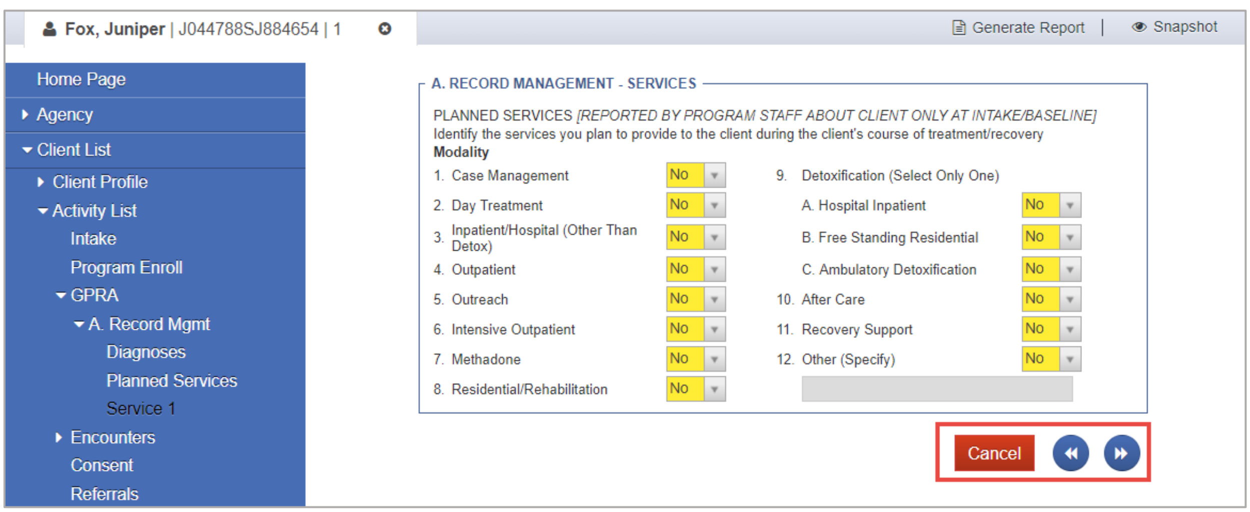


Figure 4-2: GPRA Interview Left and Right-arrow Buttons

Users can choose to go back to a prior screen by clicking the **left-arrow** button, however, answers to the current screen will be lost (a confirmation screen will appear, prompting users to select 'Yes' or 'No' before proceeding).

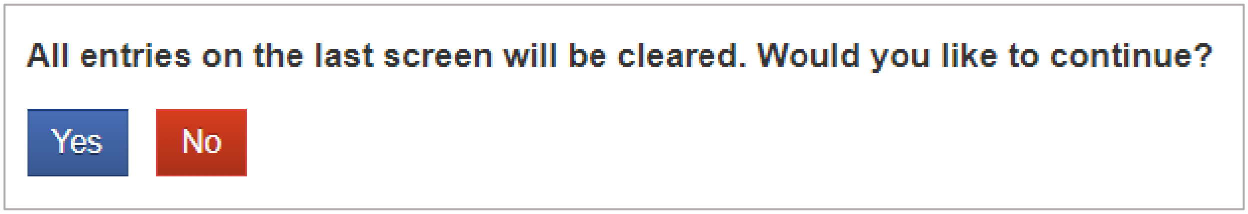


Figure 4-3: GPRA Confirmation message displayed when left-button is clicked

Automation (Skip Logic)

Based on the client's response to certain questions, the screen will update causing some questions to become required and/or automatically filled in as read-only fields. For example, if the client has not served in the military (answered "No" to Section A Question 5), the system will automatically fill in the other military questions with "Not Applicable".

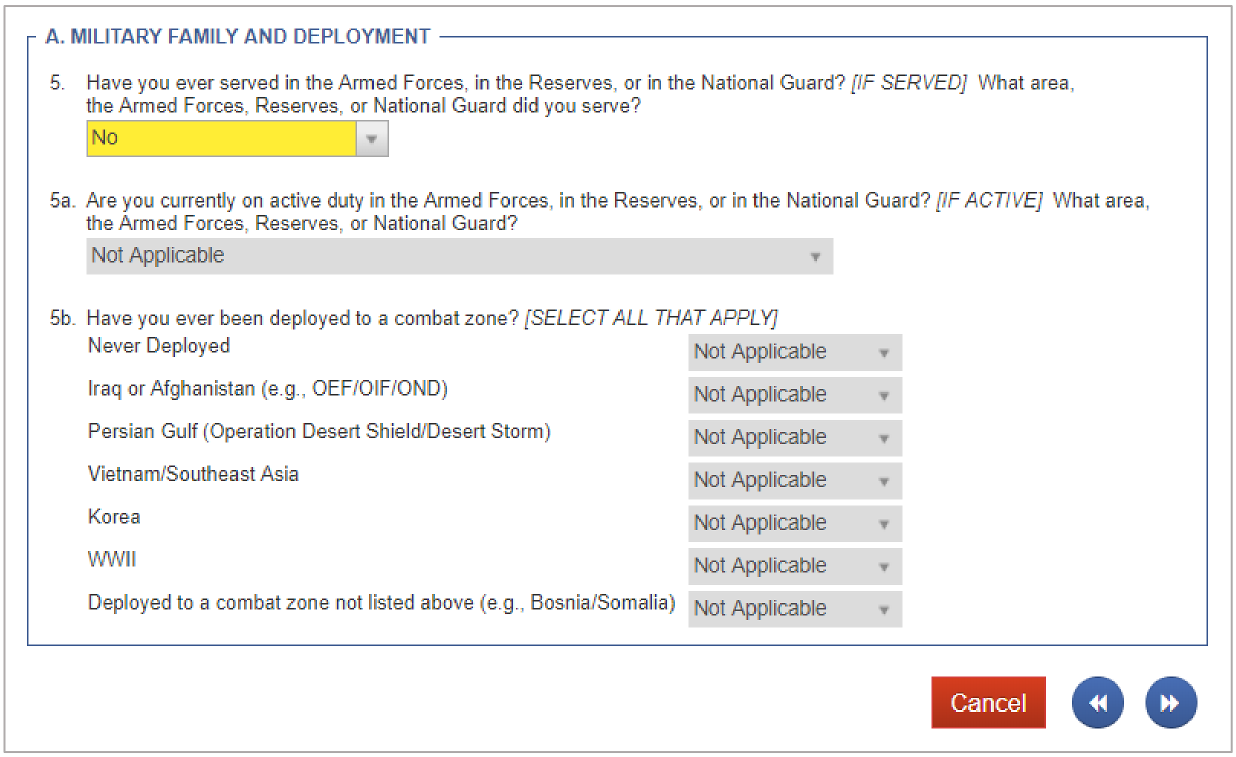


Figure 4-4: GPRA Interview, Automation (skip logic) example

Answers Reviewed

Answers to some questions are also checked with responses given in subsequent sections. For example, the value in field B.1.d (used both alcohol and drugs (on the same day)) should not exceed value in B.1.c (used illegal drugs).

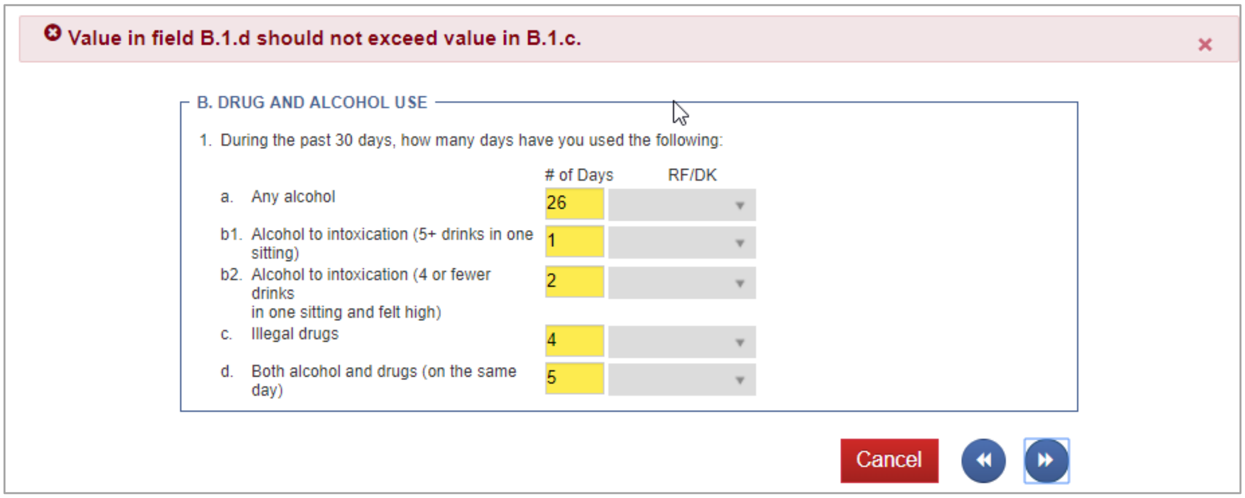


Figure 4-5: Reviewed Answers Example (Section B.), Number of days used alcohol and drugs

You reported that you have used illegal drugs during the past 30 days (B.1.c), then E4 (how many times have you committed a crime) should be no less than B.1.c, since taking illegal drugs is a crime. Do you wish to continue?

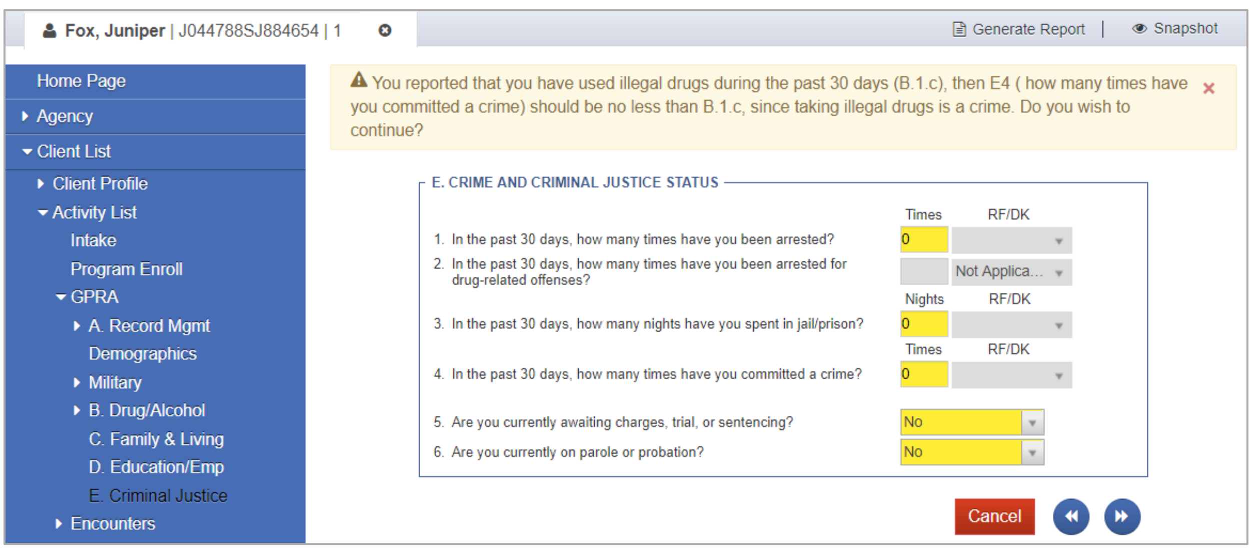


Figure 4-6: Reviewed Answers Example (Section E.), Used illegal drugs

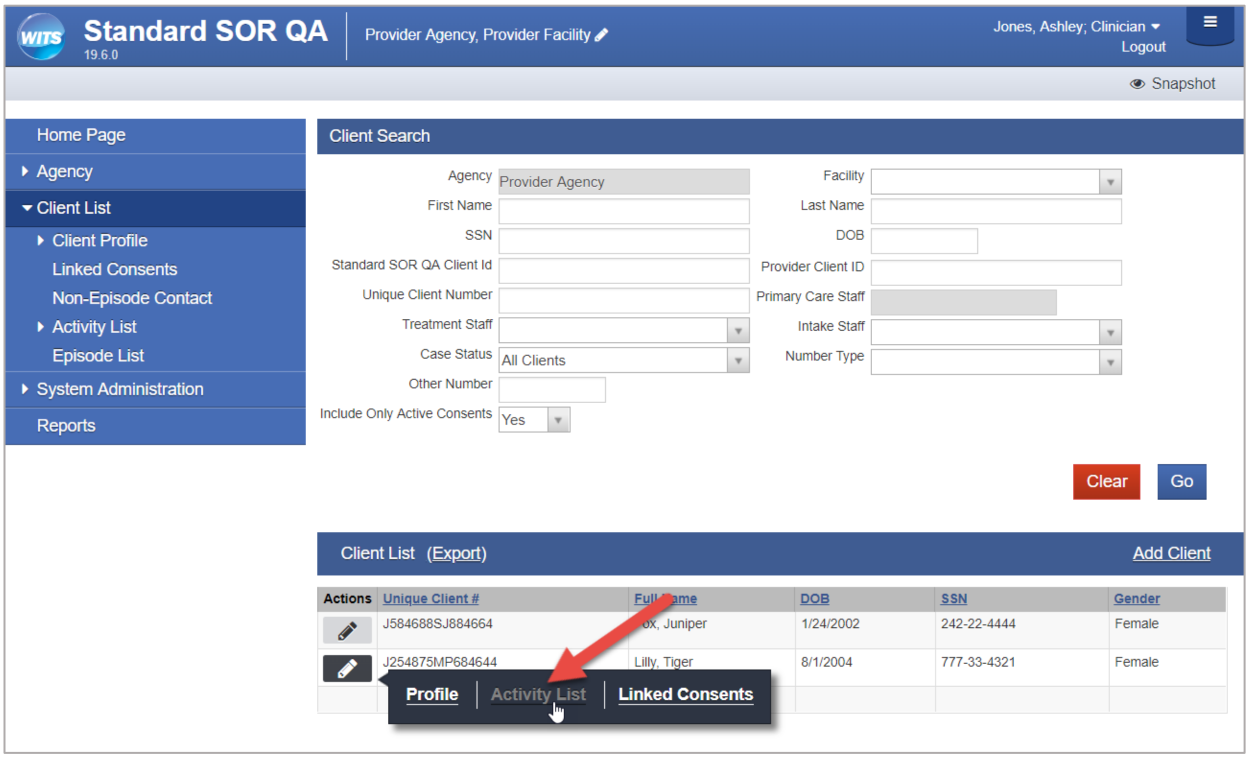
Entry for Question B.3 should be 'YES' if the Route for any substance is 'Non-IV Injection' or 'IV'.

GPRA Intake Interview

***Where:* Client List > Activity List > GPRA > GPRA Intake**

Follow the steps below to add a GPRA Intake Interview.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.



2. On the left menu, click **GPRA**.

3. On the GPRA List screen, click **Add GPRA Intake**.

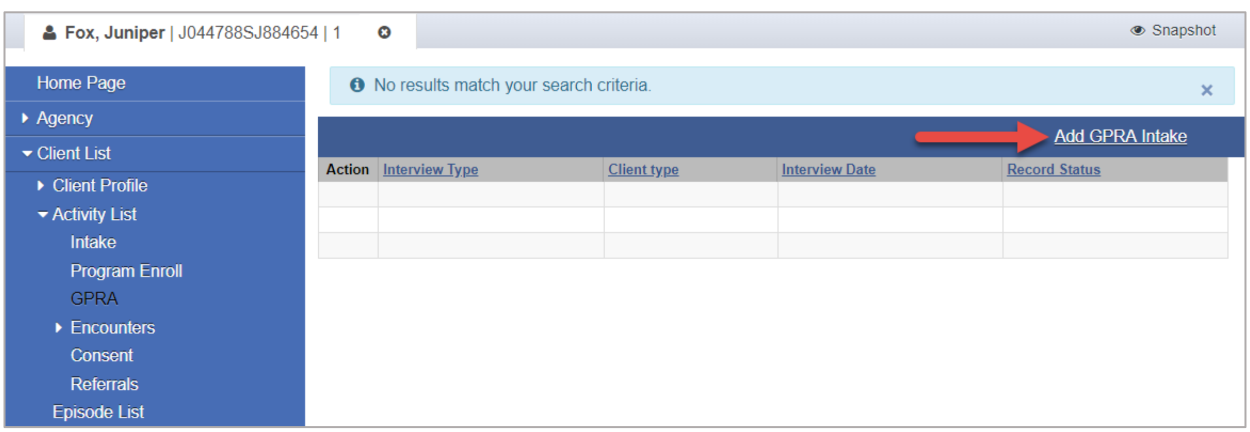


Figure 4-7: Add GPRA Intake

4. The system will display the first of several GPRA Interview screen. Complete the required fields.

Note: The 'Interview Date' must be greater than or equal to client intake date.

The 'Interview Date' must occur during the active period of the selected Program Enrollment (MM/DD/YYY -).

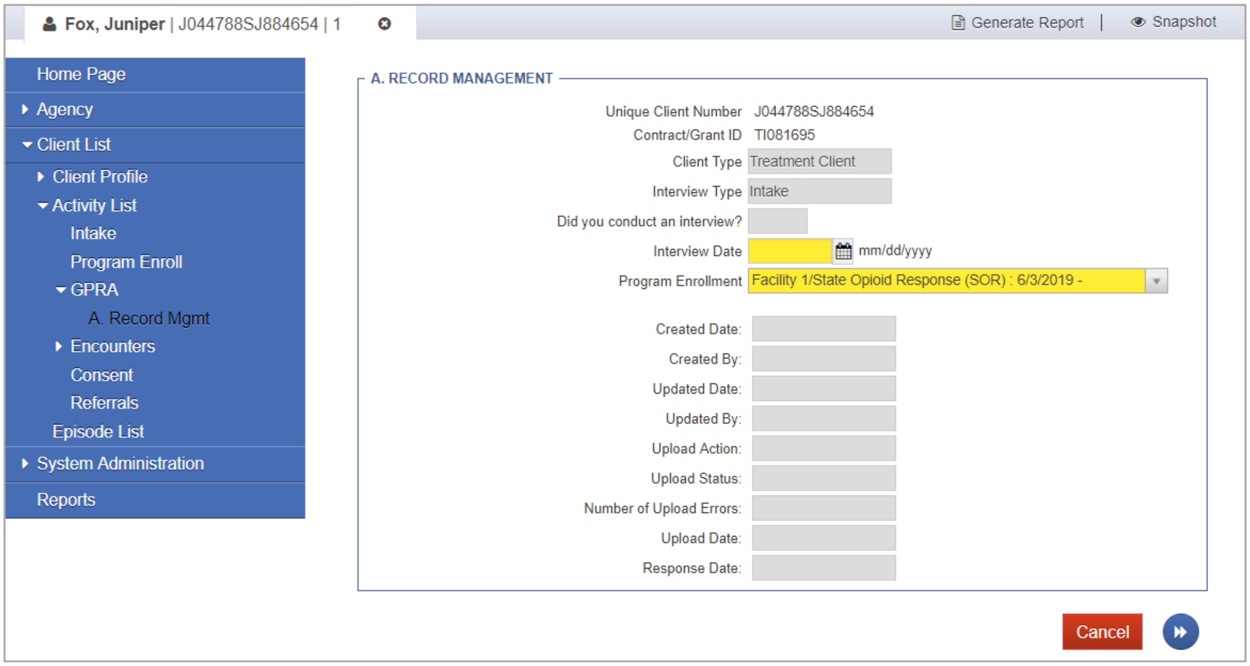


Figure 4-8: GPRA Intake, Record Management section

5. Click the **right-arrow** to move to the next GPRA section.

6. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.

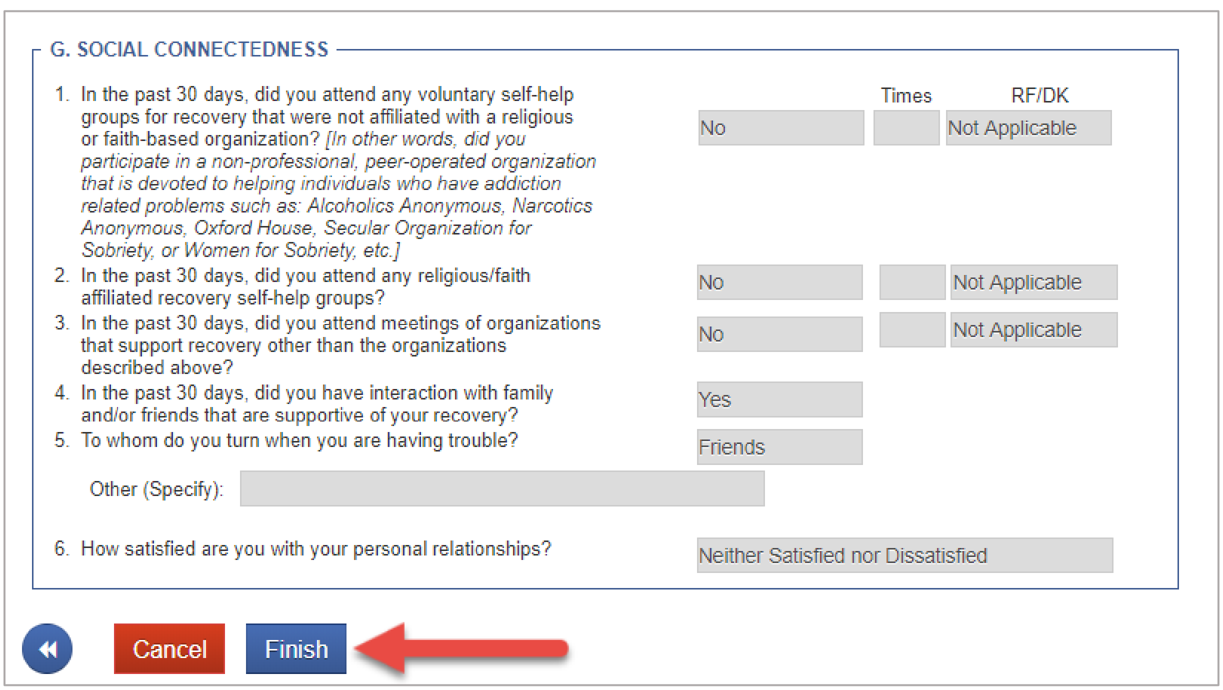
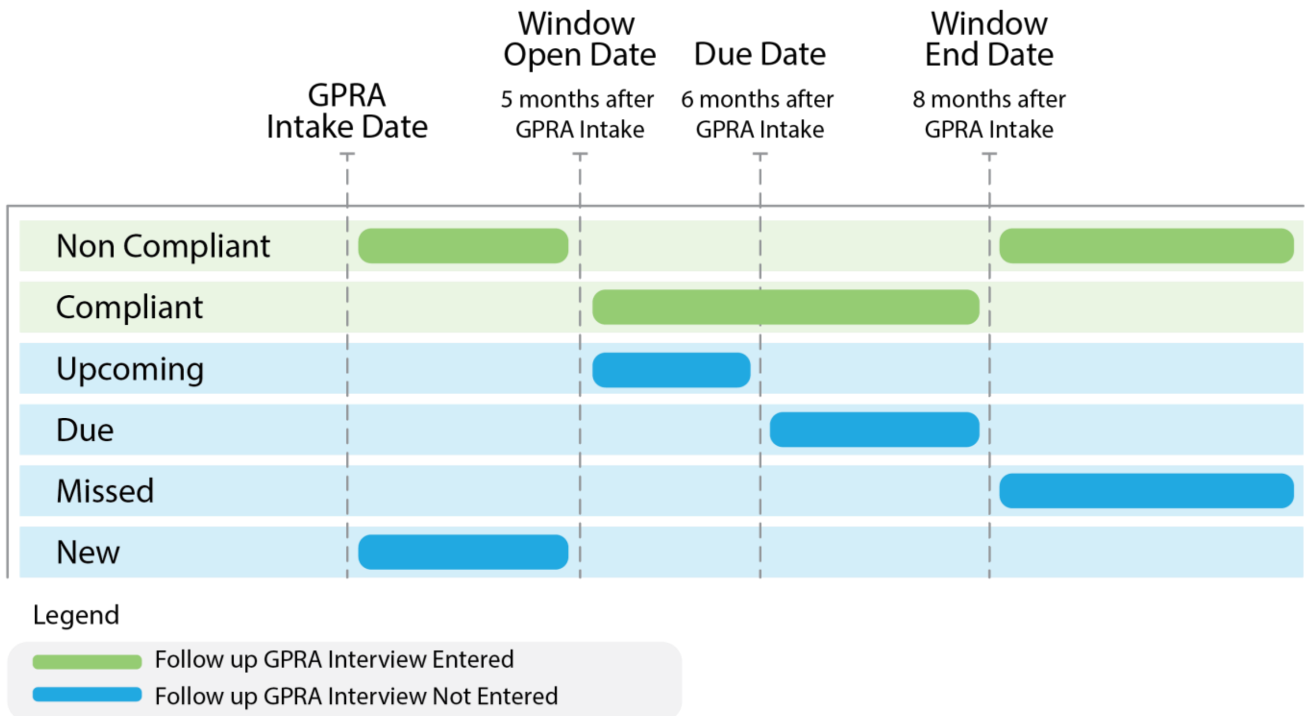


Figure 4-9: Intake Interview, Summary Screen

GPRA Interview Compliance Details

Grant Requirement

A GPRA Follow-up Interview must be completed with the client 6 months after the GPRA Intake Interview. There is a 3-month window to enter that follow-up interview in WITS and be in compliance with the grant program's requirement. The compliance window opens 5 months after the GPRA Intake Interview and ends 8 months after the GPRA Intake Interview.



Compliance Rate Calculation = Number Compliant / (Number Compliant + Number Non Compliant + Number Due + Number Missed)

Figure 4-10: GPRA Follow-up Due Diagram

Definitions for each follow-up status are included in the following table.

Table 4-2: Follow up Attendance Definitions

Term	Meaning
Compliant	GPRA Follow-up Interviews **entered** into WITS **during** the compliance window specified above are considered compliant. The GPRA follow up interview must be conducted (Was the GPRA interview conducted = Yes) and the interview date must be within the window.
Non-Compliant	GPRA Follow-up Interviews **entered** into WITS **outside** of the compliance window specified above are considered non-compliant. This count also includes GPRA Follow-up Interviews that are entered in the system but were not conducted (with no interview date, Was the GPRA interview conducted = No).
Upcoming	Clients with no follow-up interview who have a GPRA intake Interview dated between 5 and 6 months ago (for 6-month follow up) are part of the **Upcoming** count.

Term	Meaning
Due	Corresponds to the number of clients who have reached the due date (6 months) and do not yet have a GPRA Follow-up Interview record in WITS. This count does not consider the clients who have a corresponding GPRA Discharge Interview with a termination of "Death, Unknown" and "Death, Cause known". This would cover a scenario where a client died before the follow-up became due.
Missed	The clients who do not have a GPRA Follow-up Interview entered into WITS after the end of the window are a part of the **Missed** count.
New	The Clients who have a GPRA intake Interview, no GPRA Follow-up Interview, and who have not entered in a follow up window yet, are a part of the **New** count.

GPRA Follow-up Due Summary Screen

Where:* *Agency* > *GPRA Follow-up Due Summary

The **GPRA Follow-up Due Summary** screen displays a summary view of where an agency stands with their follow up interviews and includes the agency's compliance rate. Users can select from the available search fields and click **Go** to view the search results. Information on these search fields are listed in the table below.

The search results will display a distinct count of GPRA interviews for each follow-up status available at the time of searching. For definitions of each status, see *Table 4-2: Follow up Attendance Definitions* on page 35 above.

Table 4-3: GPRA Follow-up Due Summary Screen Search Filters

Field	Description
Agency Type	In the **Agency Type** search field, the option "**Intake**" represents the agency where the GPRA Intake Interview was conducted. The option, "**Follow-up**" represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be prepopulated with the SOR grant.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.

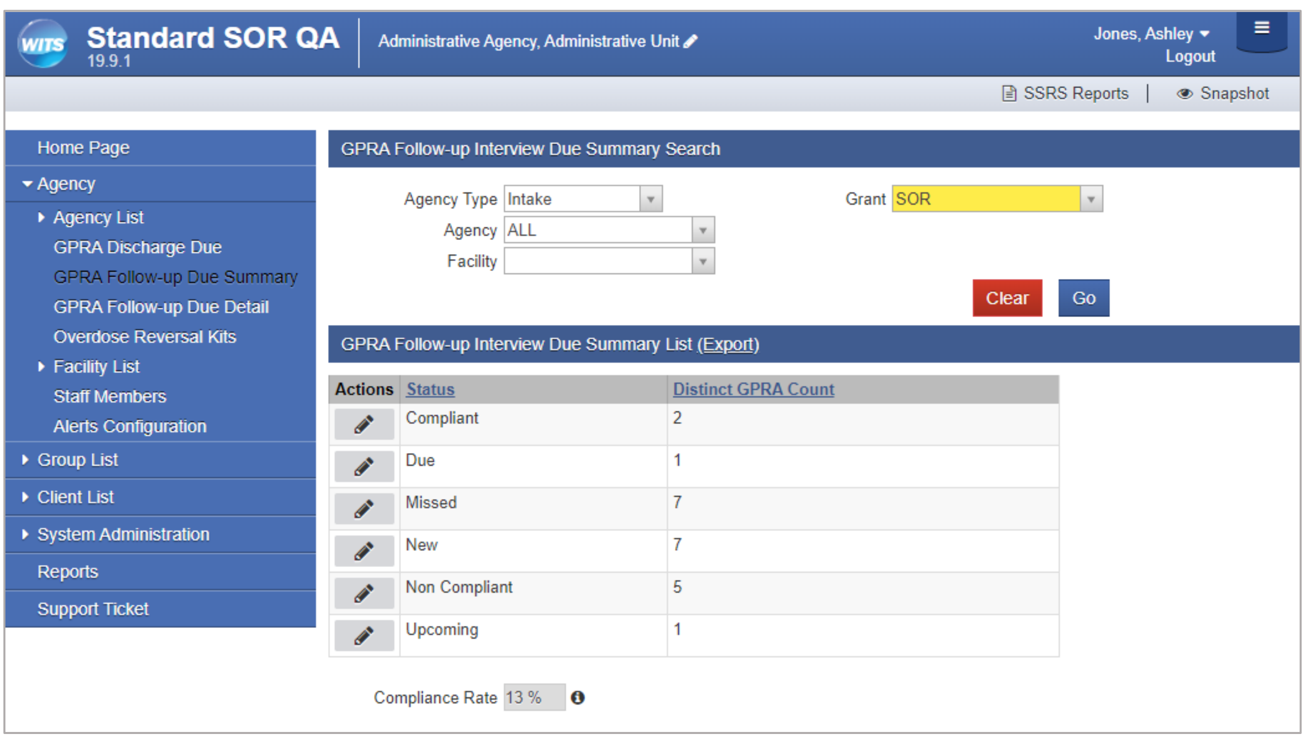
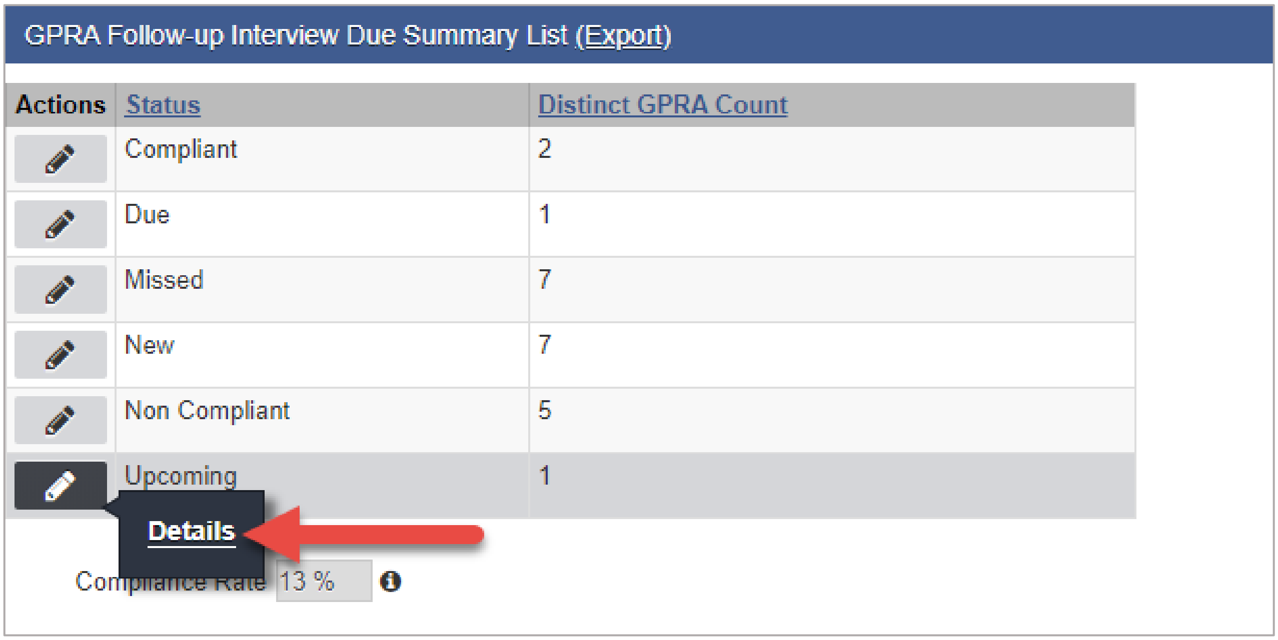


Figure 4-11: GPRA Follow-up Due Summary screen

Detailed information for each interview status can be seen by hovering over the pencil icon in the Actions column, then clicking **Details**. The system will then redirect to the GPRA Follow-up Due Detail screen, displaying the associated client records for the selected interview status and the current search criteria. The GPRA Follow-up Due Detail screen is covered in the next section.


GPRA Follow-up Interview Due Summary List (Export)

Actions	Status	Distinct GPRA Count
	Compliant	2
	Due	1
	Missed	7
	New	7
	Non Compliant	5
	Upcoming	1

Figure 4-12: GPRA Follow-up Interview Status List, Details link

GPRA Follow-up Due Detail Screen

***Where:* Agency > GPRA Follow-up Due Detail**

The **GPRA Follow-up Due Detail** screen displays a list of client records with information regarding the clients' GPRA interview status. Staff members can use the available search fields and click **Go** to view the results.

Table 4-4: GPRA Follow-up Due Detail Screen Search Filters

Field	Description
Agency Type	In the **Agency Type** search field, the option "**Intake**" represents the agency where the GPRA Intake Interview was conducted. The option, "**Follow-up**" represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be prepopulated with the SOR grant.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.
Status	The **Status** search field will filter the list of clients corresponding to a specific compliance status. For definitions of each status, see *Table 4-2: Follow up Attendance Definitions* on page 35 above.

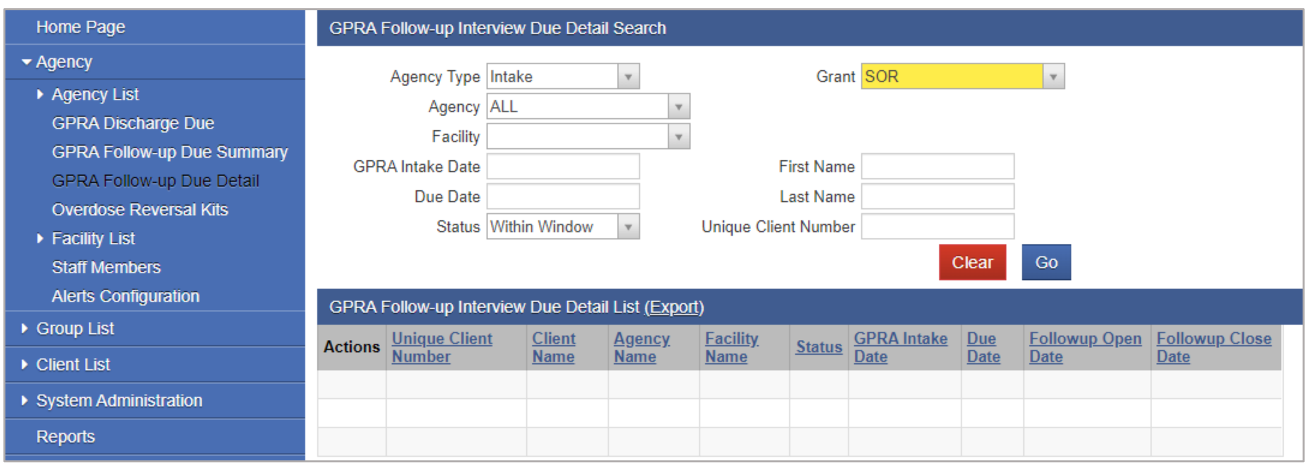


Figure 4-13: GPRA Follow-up Due Detail screen

If the staff member was redirected to this screen by clicking the "**Details**" link on the GPRA Follow-up Due Summary screen, the Agency Type, Agency, Facility and Grant, search fields and Status will be prepopulated with the options entered on the Summary screen. The following informational message will also be displayed, *"The records on this list may not match the total from the summary because you may not have access to some clients."*

Note: Since the GPRA Follow-up Due Detail screen includes client names, the search results displayed in the list are filtered to only include clients that the staff member has access to.

The records on this list may not match the total from the summary because you may not have access to some clients.

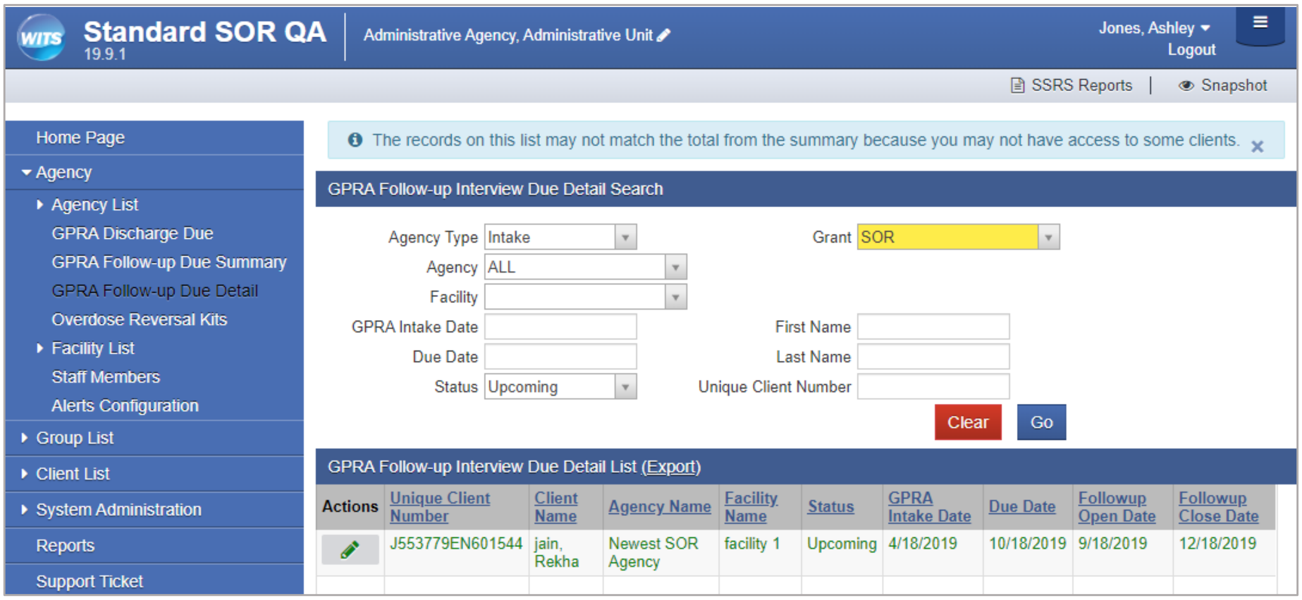


Figure 4-14: GPRA Follow-up Due Screen, pre-populated based on Summary screen selections

In the **Actions** column, clicking the "**View**" link will redirect to the client's GPRA list screen if the staff member is currently in the same context agency as the client. If the staff members' context agency is different than the client, clicking the "View" link will display the following error message, *"This client does not exist in the context agency. Please change your context agency to view the client."*

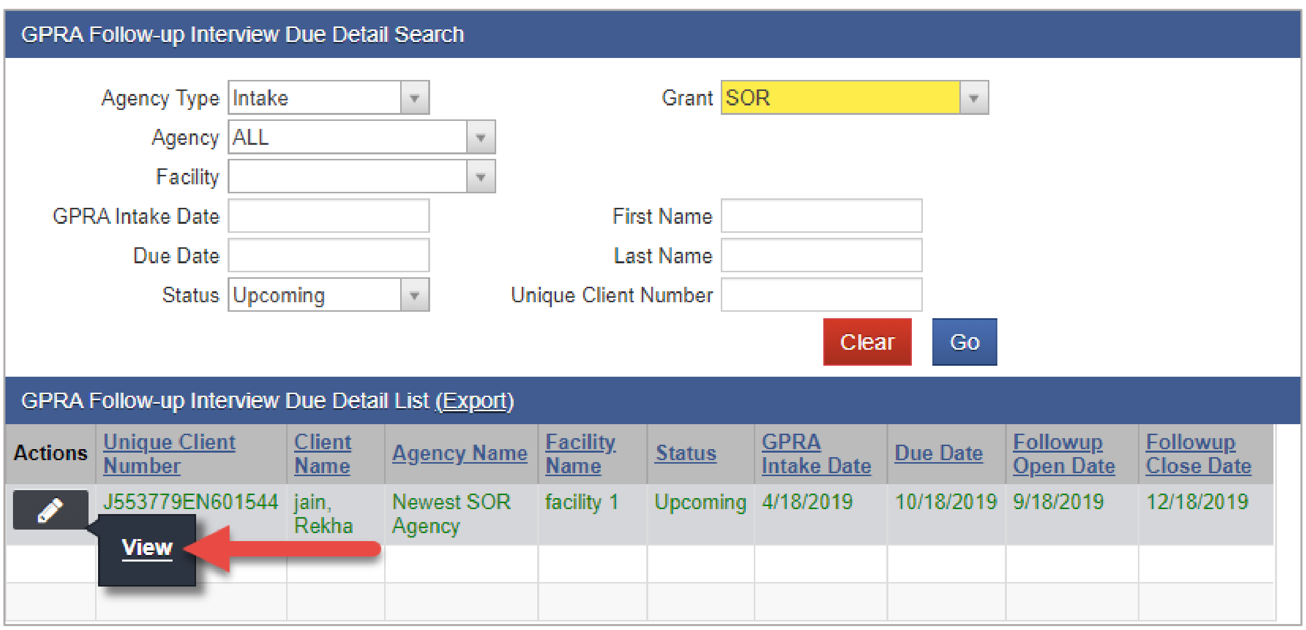


Figure 4-15: GPRA Follow-up Due Detail, View link

Note: If you have access to multiple agencies, make sure you're in the correct context agency to view the client record. Otherwise, the following error message will be displayed.

"This client does not exist in the context agency. Please change your context agency to view the client."

This client does not exist in the context agency. Please change your context agency to view the client.

GPRA Follow-up Interview

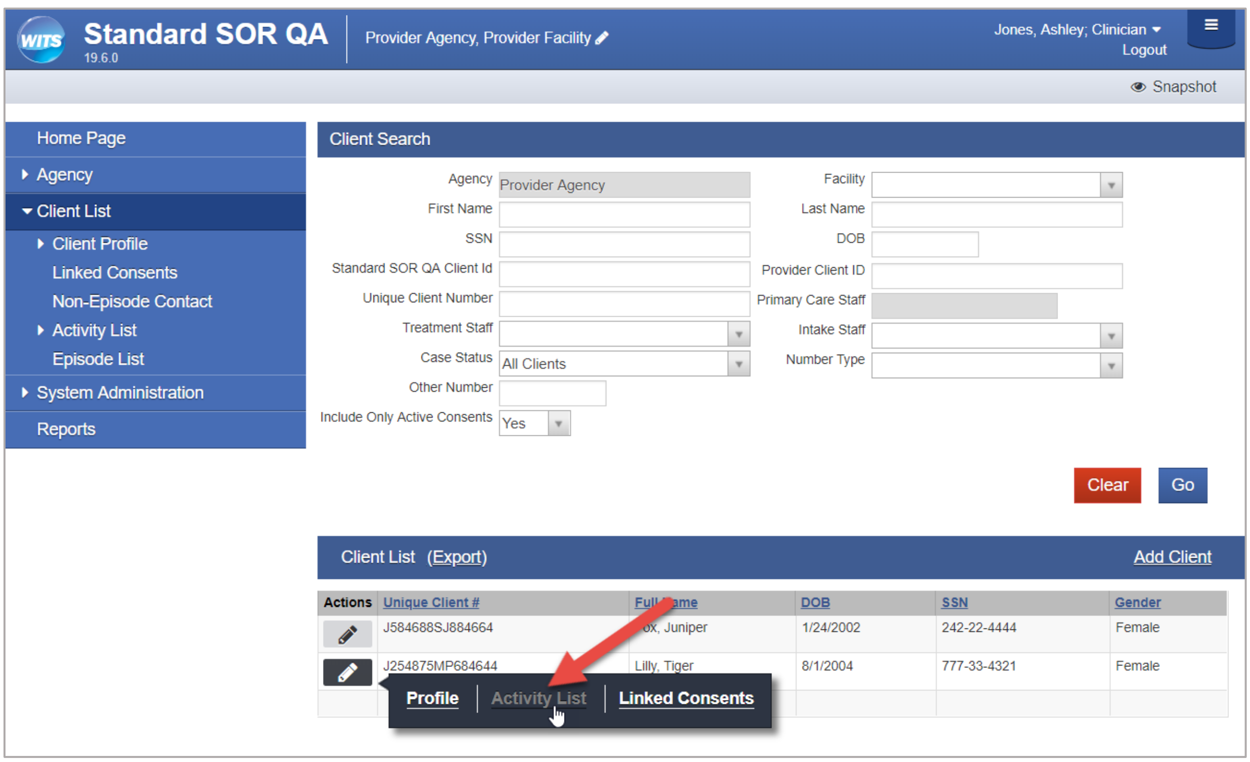
***Where:* Client List > Activity List > GPRA > GPRA Follow-up**

GPRA Follow-up Interviews should be added 5 to 8 months after a client's GPRA Intake Interview Date. Follow-up GPRA Interviews include additional questions to record the follow-up status. To add a follow-up record, follow the steps below.

Note: If a follow-up interview has been conducted, **sections B through G** and **I** must be completed.

If the follow-up interview has ***not*** been conducted, **section I** must be completed.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.



2. On the left menu, click **GPRA**.
3. On the GPRA List screen click **Add GPRA Follow-up**.

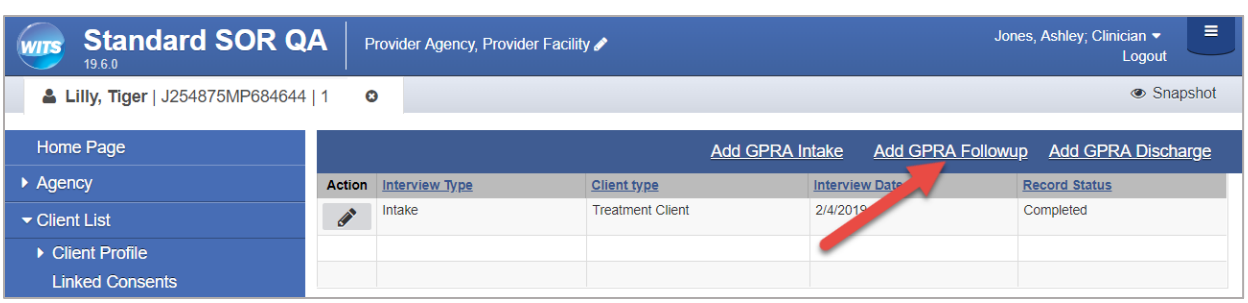


Figure 4-16: GPRA list, Add GPRA Follow-up link

4. The system will display a confirmation screen stating, “You are about to enter a 6-month follow-up record for this client. Would you like to continue?” Select **Yes** to start the follow-up interview.

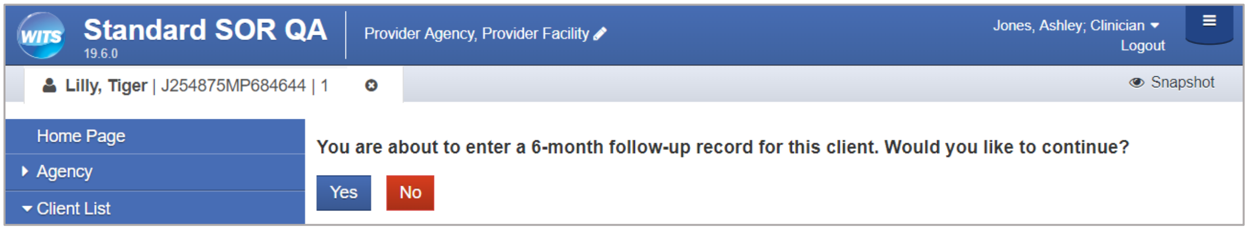


Figure 4-17: Follow-up interview confirmation screen

Note: The system will display a warning message if the Follow-up Interview Date is not within 5 to 8 months after the GPRA Intake Interview Date. This message will also be displayed on the GPRA list screen.

5. When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen. If the interview was not conducted (answered “No” to the question “Did you conduct an interview?”), clicking the right-arrow button will display Section I. Follow-up Status.

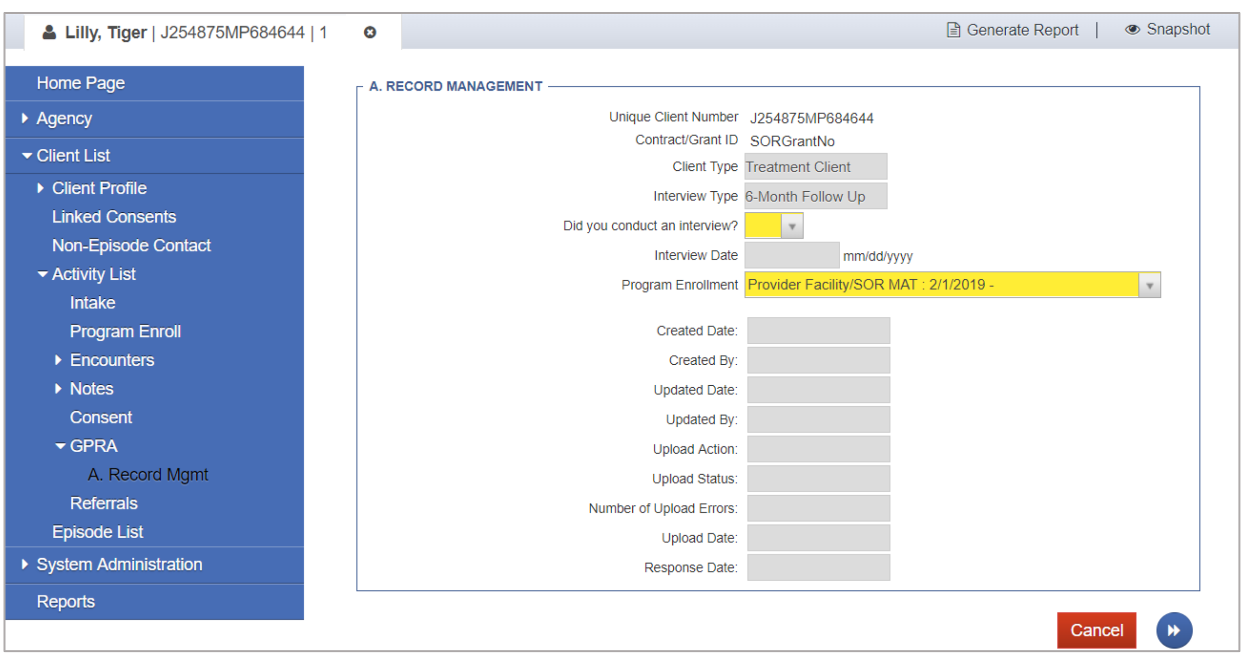


Figure 4-18: GPRA Follow-up, Section A. Record Management

6. In **Section A. Record Management - Behavioral Health Diagnoses**, if the client had medications selected on their encounter(s) within the grant episode, and the user answers "**Yes**" to questions 1a or 2a, then medication information will be prepopulated on screen. Users can modify this prepopulated information as needed.

Note: Encounters may have been entered in other agencies than yours.

The Received field will be set to "Yes" for each medication listed on the encounter(s), and "No" to all other medications. For each drug received, the number of days will be set based on the encounter(s) of the client's grant episode, and when the encounter service start date or end date were 30 days or less from the GPRA interview date. If more than one drug was selected on an encounter, then the same number of days for each drug on the GPRA discharge and Follow ups will be set. The number of days is based on encounter service start date/end date. If the encounter has no end date, it will be counted as one day. If multiple encounters are entered on the same day, then it counts 1 day per medication.

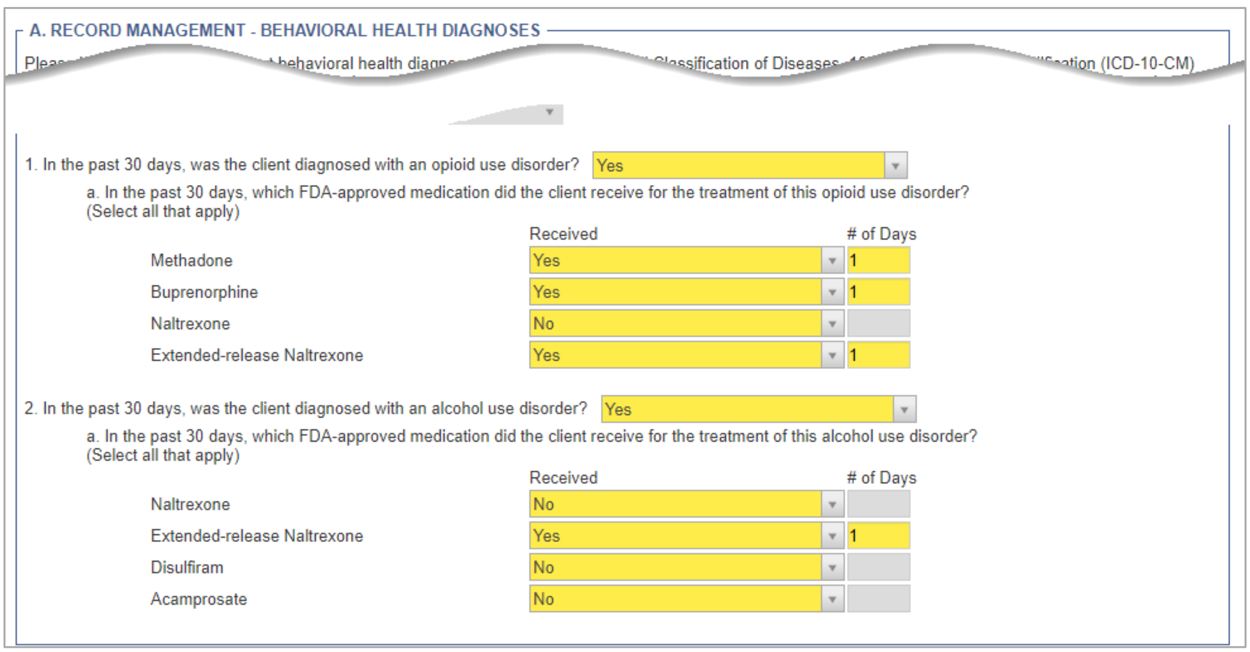
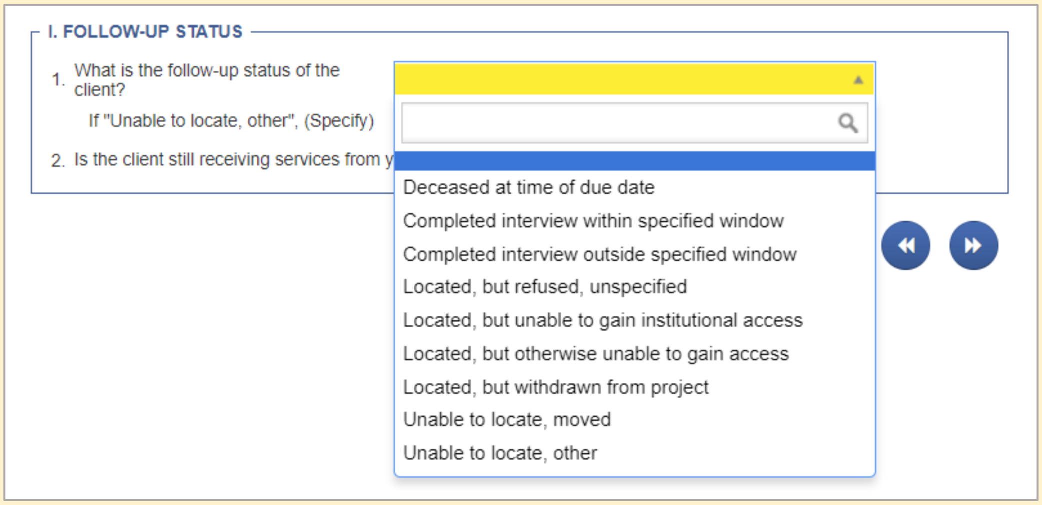
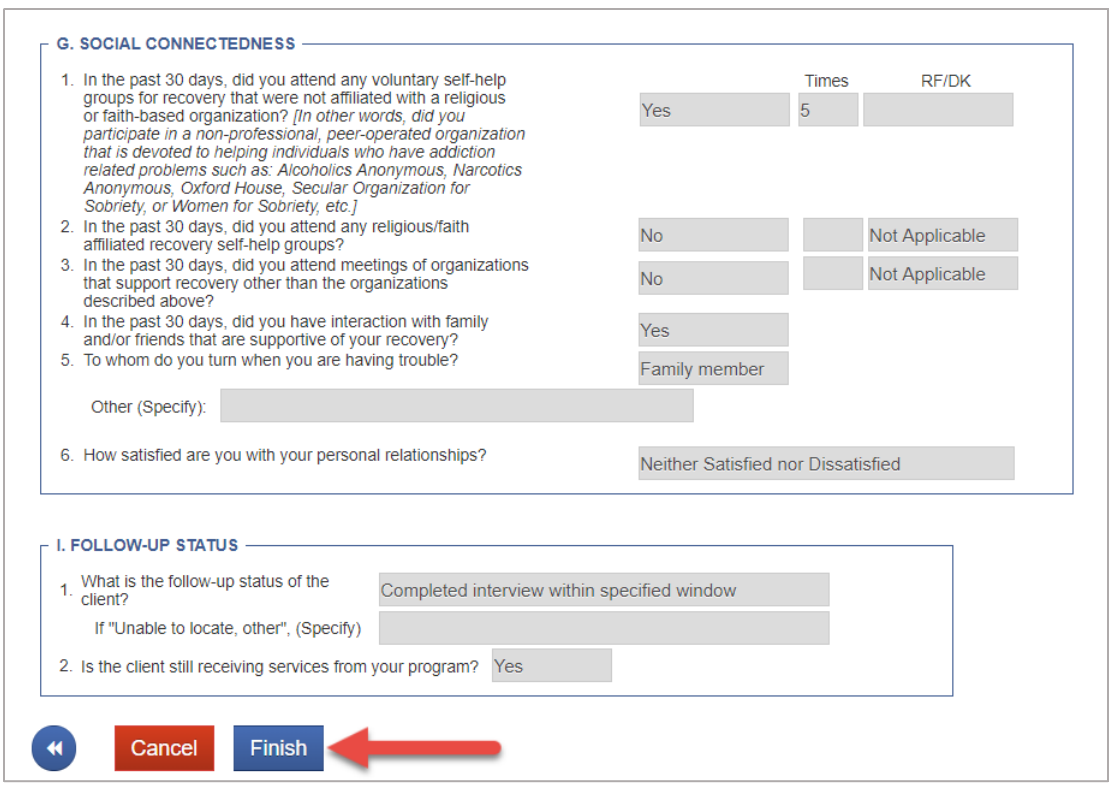


Figure 4-19: GPRA Follow-up Interview, Section A, questions 1a and 2a, prepopulated values

Note: For question I.1., make sure to select the correct follow-up status for the client from the drop-down list, especially when selecting if the interview was completed ***within*** specified window, or ***outside*** specified window.



7. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.



8. If the GPRA Follow up interview was conducted within the 5 to 8 months window, and if no GPRA Discharge exists for this client's grant episode, then the system will display a confirmation screen asking if you would like to create a GPRA Discharge interview with the same information as the GPRA Follow up interview:

Select **Yes** and the GPRA Discharge will automatically be created. It is recommended that you review the newly created GPRA Discharge interview and make any updates as necessary. For example, **section J – Discharge Status** may need questions 3. and 4. updated from "No" to "Yes", if it applies.

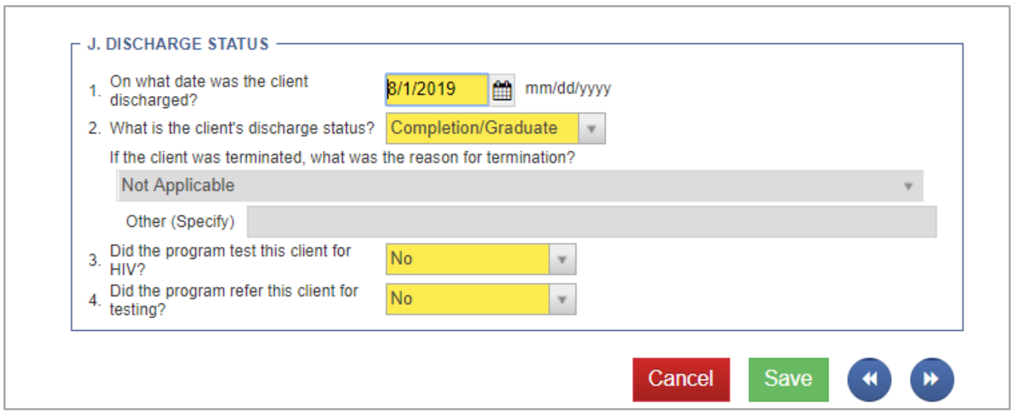


Figure 4-20: Discharge Status

GPRA Discharge Due Screen

***Where:* Agency > GPRA Discharge Due**

The **GPRA Discharge Due** screen displays at the Agency level, clients with a GPRA Intake interview date 30 days ago and the client has no encounter, or their most recent encounter is 30 days ago. Users can select from the available search fields and click **Go** to view the search results. In the **Actions** column, clicking the "**View Client**" link will redirect to the client's GPRA list screen if the staff member is currently in the same context agency as the client.

Table 4-5: GPRA Discharge Due Screen Search Filters

Field	Description
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **All Agency Access** roles, then this field will display all the agencies.
Grant	This field will be prepopulated with the SOR grant.

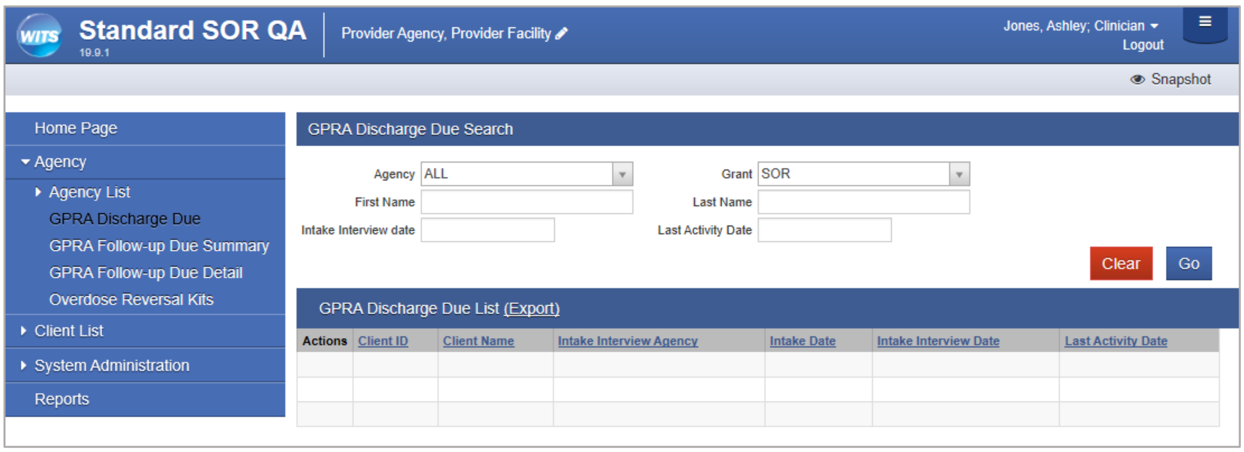


Figure 4-21: GPRA Discharge Due Screen

Note: Since the GPRA Discharge Due screen includes client names, the search results displayed in the list are filtered to only include clients that the staff member has access to.

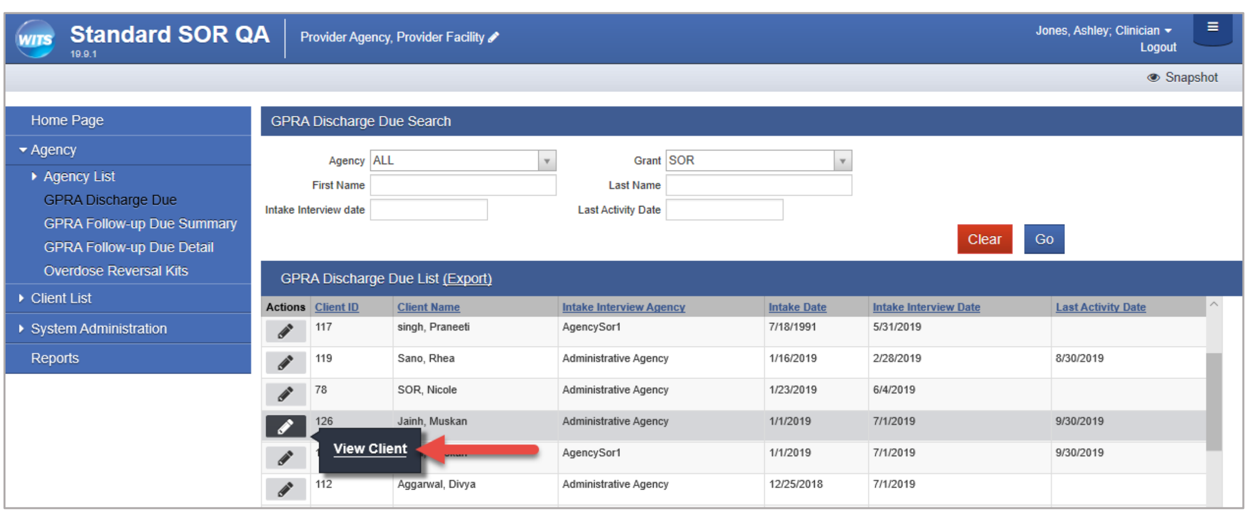


Figure 4-22: GPRA Discharge Due screen, View Client link

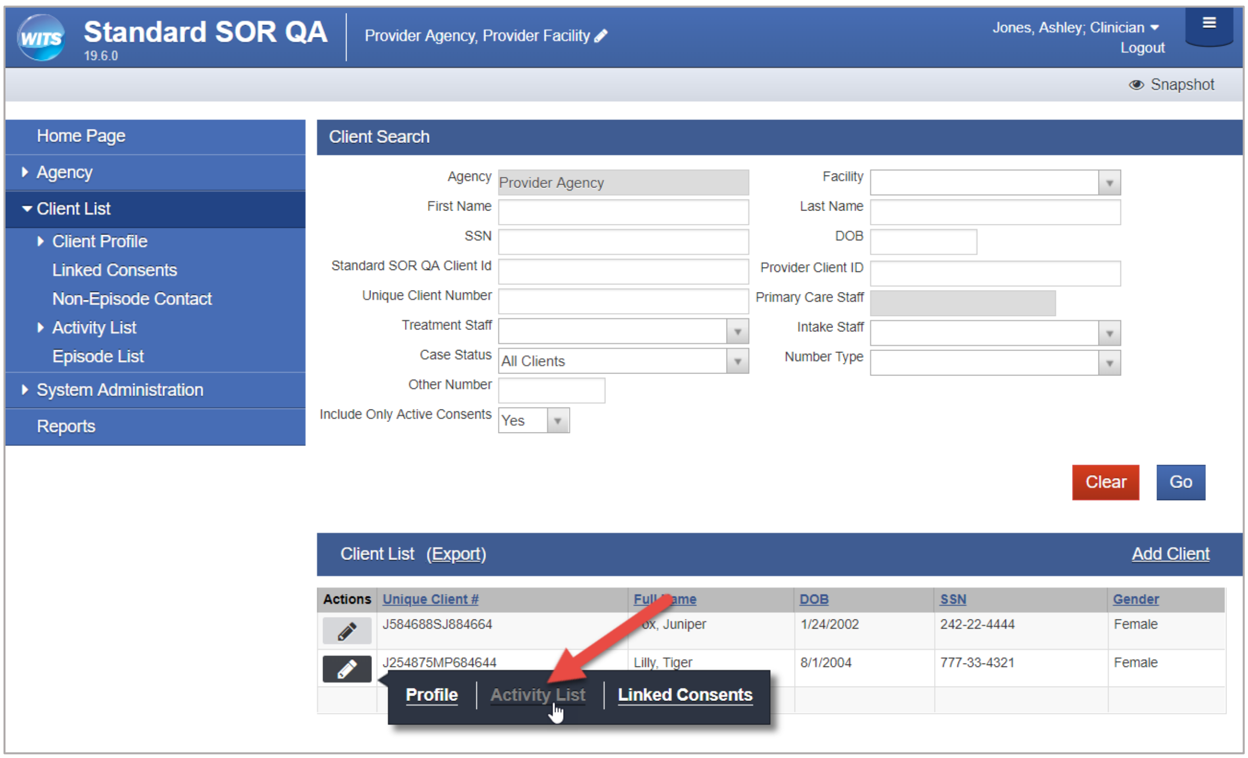
GPRA Discharge Interview

***Where:* Client List > Activity List > GPRA > GPRA Discharge**

To add a discharge record, follow the steps below.

> **Note**: If a Discharge interview has been conducted, **Sections B through G**, **J** and **K** must be completed.
>
> If the Discharge interview ***has not*** been conducted, **Sections J** and **K** must be completed.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.



2. On the left menu, click **GPRA**.

3. On the GPRA List screen, click **Add GPRA Discharge**.

Figure 4-23: GPRA List screen, Add GPRA Discharge link

4. The system will display the following message, “You are about to enter a discharge record for this client. Would you like to continue?” Select **Yes** to start the discharge interview.

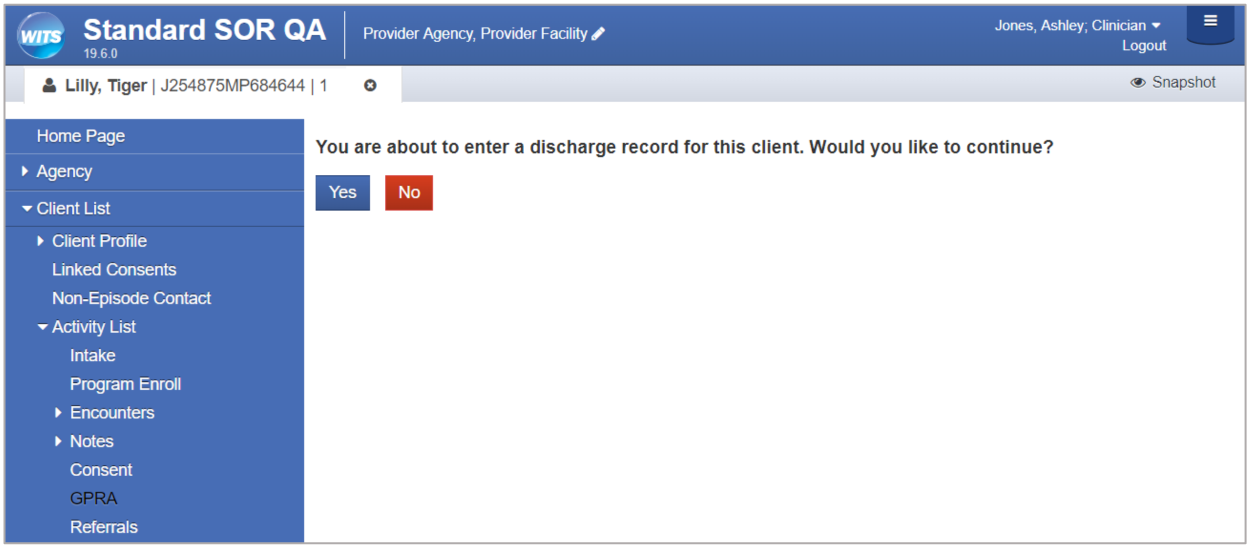


Figure 4-24: Discharge interview confirmation screen

5. When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen. If the interview was not conducted (answered “No” to the question “Did you conduct an interview?”), clicking the right-arrow button will display Section J. Discharge Status.

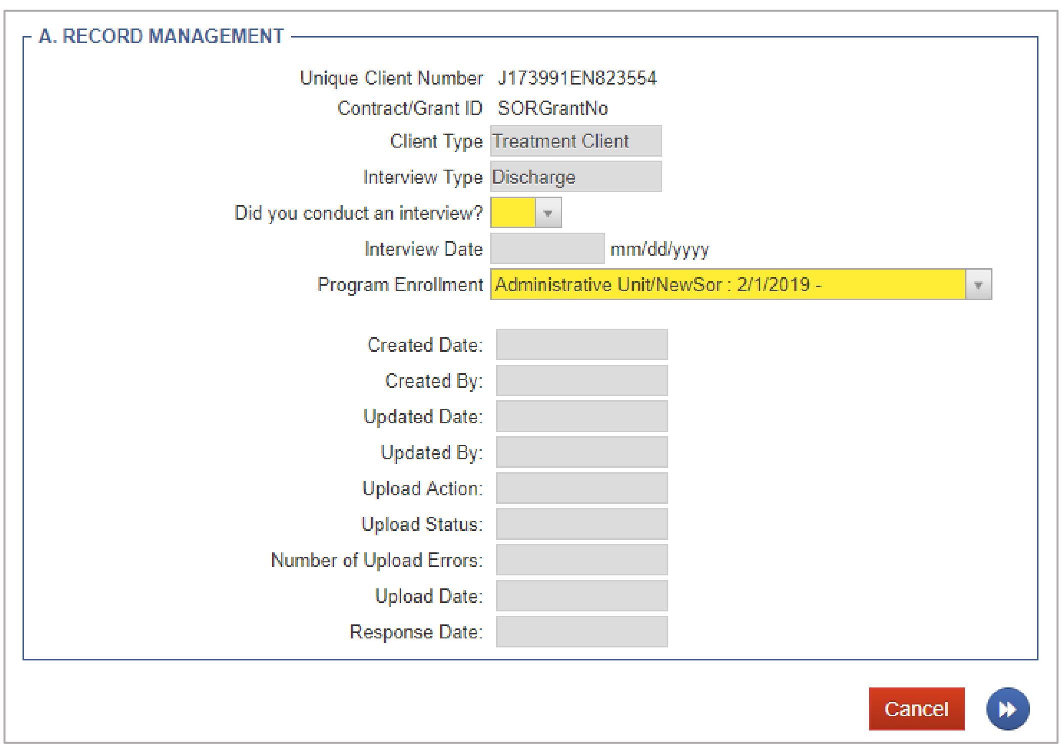


Figure 4-25: GPRA Discharge Interview; Section A. Record Management

6. In **Section A. Record Management - Behavioral Health Diagnoses**, if the client had medications selected on their encounter(s), and the user answers “**Yes**” to questions 1a or 2a, medication information will be prepopulated on screen. Users can modify this prepopulated information as needed.

Note: Encounters may have been entered in other agencies than yours.

The Received field will be set to “Yes” for each medication listed on the encounter(s), and “No” to all other medications. For each drug received, the number of days will be set based on the encounter(s) of the client’s grant episode, and when the encounter service start date or end date were 30 days or less from the GPRA interview date. If more than one drug was selected on an encounter, then the same number of days for each drug is set on the GPRA discharge and Follow ups. The number of days is based on encounter service start date/end date. If the encounter has no end date, it will be counted as one day. If multiple encounters are entered on the same day, 1 day per medication is counted.

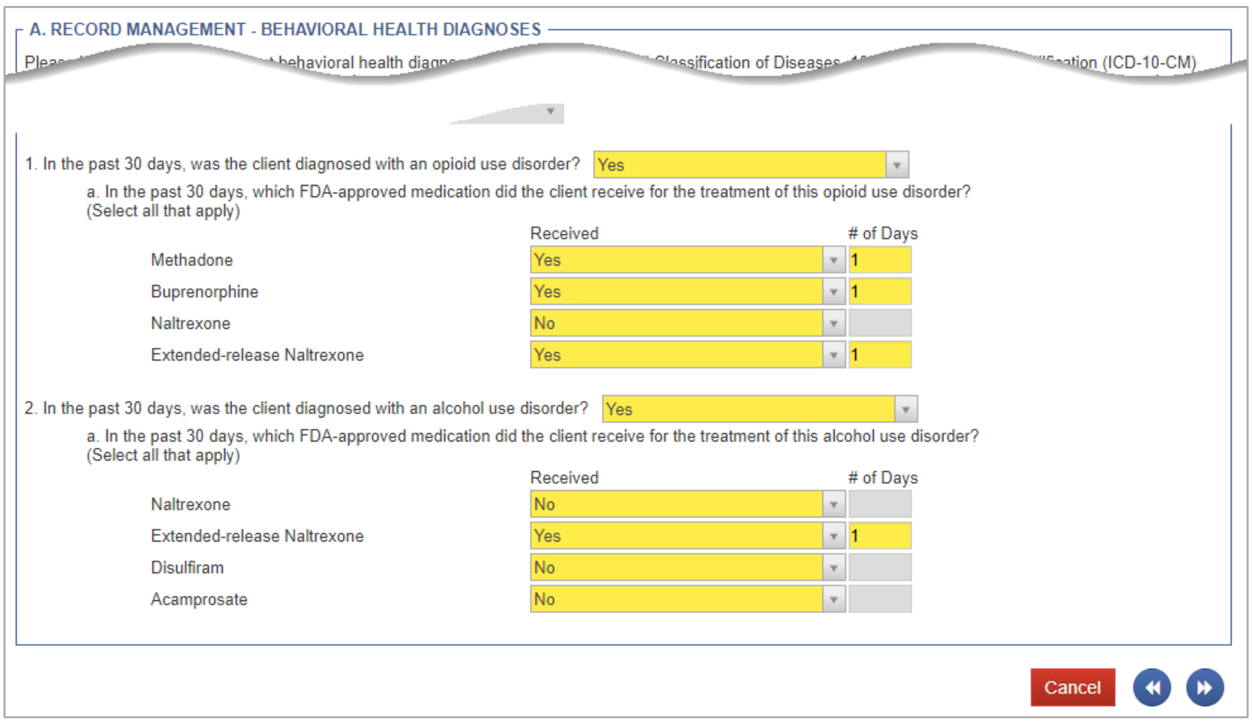


Figure 4-26: GPRA Discharge Interview, Section A, questions 1a and 2a, prepopulated values

7. Complete the required fields and click the **right-arrow** button to progress to the next screen.

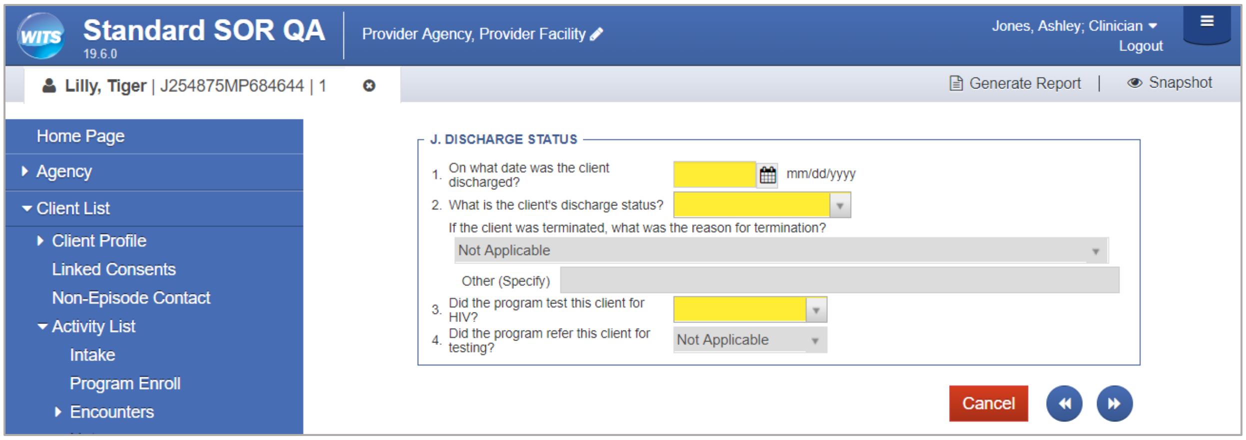


Figure 4-27: Section J. Discharge Status

8. **Section K – Services Received** will be prepopulated based on the encounter(s) recorded for the client within the grant episode (encounters may have been entered in other agencies than yours). You may edit this section as needed.

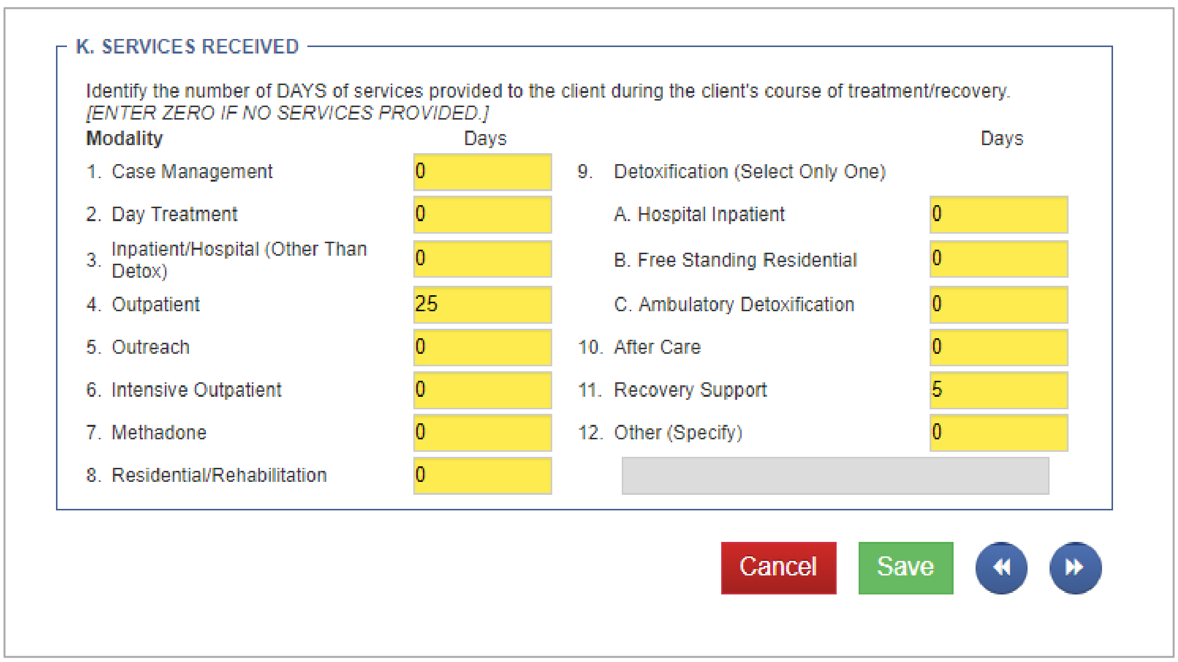


Figure 4-28: Section K. Services Received; Number of Days of Services

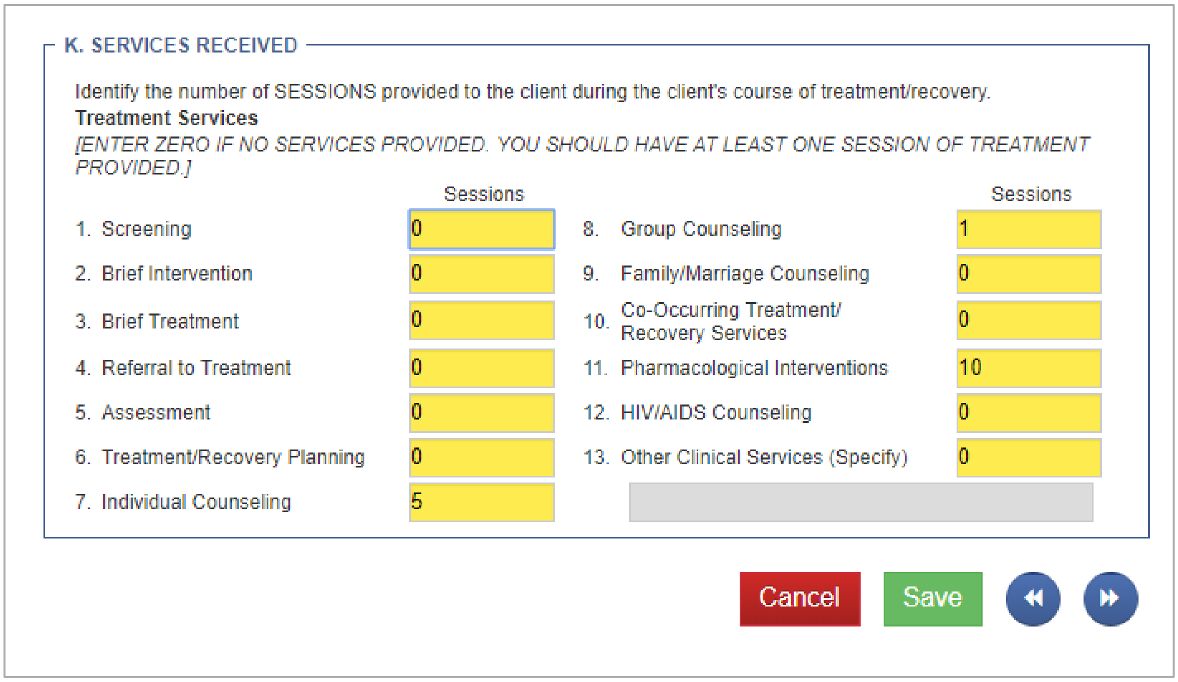
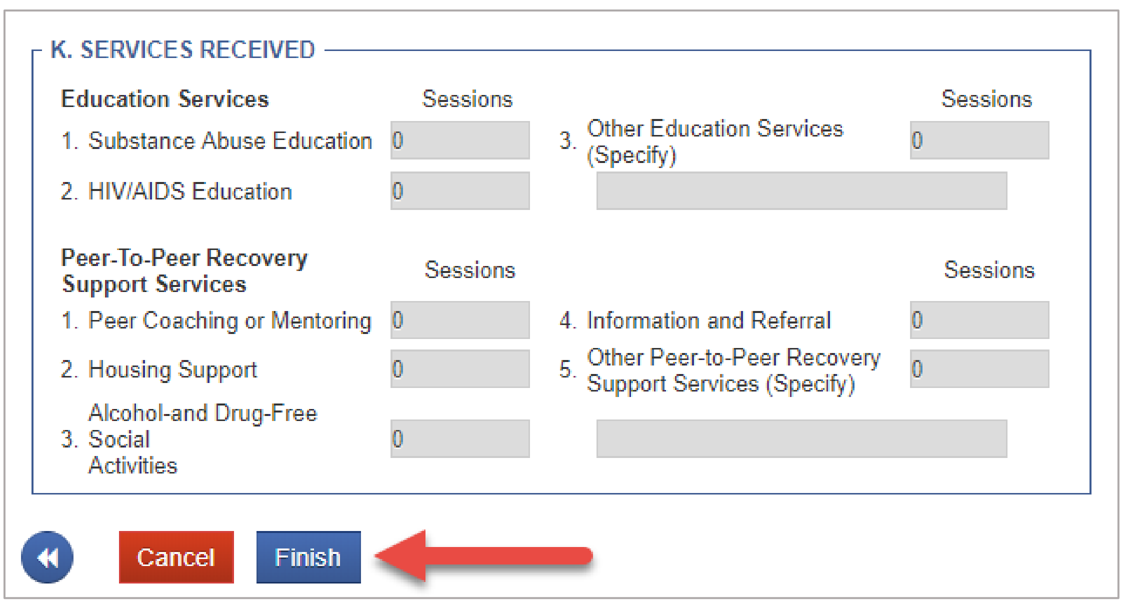


Figure 4-29: Section K. Services Received; Number of Sessions Provided

Please contact your system administrator if you believe encounters exist for this client but the Services Received section is not populated with the number of days and sessions; the mapping of the modalities and services may be incomplete.

9. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.



Part 5: Supplemental Questions

Florida has a need to ask additional questions pertaining to the SOR grant within the GPRA interviews because the current GPRA questions do not fully assess the client's life situation during GPRA Intake, Discharge and Follow up. These questions are shown in the figure below.

SUPPLEMENTAL QUESTIONS

1. Was this individual receiving MAT services funded by another funding source (Ex: another grant: STR, Block, etc.) previous to enrollment in State Opioid Response (SOR) funding?
   - Was the individual previously enrolled in STR funding?
   - Date of Enrollment in STR funded services?
2. What Medication-Assisted Treatment (MAT) are you receiving at the time of this interview?
3. In your lifetime, how many non-fatal opioid overdoses have you experienced? (IF ZERO OVERDOSES, ENTER 0)
4. In the past 30 days, how many a non-fatal opioid overdoses have you experienced? (IF ZERO OVERDOSES, ENTER 0)
   - For your last overdose, were you administered Naloxone (Narcan)?
   - For your last overdose, was a 911/ambulance/emergency services/fire & rescue called?
   - For your last overdose, did you receive medical treatment in a hospital (emergency room or general admission)?
5. Do you always carry naloxone to administer in case of an Opioid overdose?
6. Have you been offered Naloxone by your MAT provider?

Figure 5-1: Supplemental Questions

Supplemental questions will be asked on all new GPRA interviews in a section labeled, "Supplemental Questions" as shown in Figure 5-2. All questions are required including all conditionally enabled questions (which means an answer to one question may require additional responses and those fields will become active on screen).

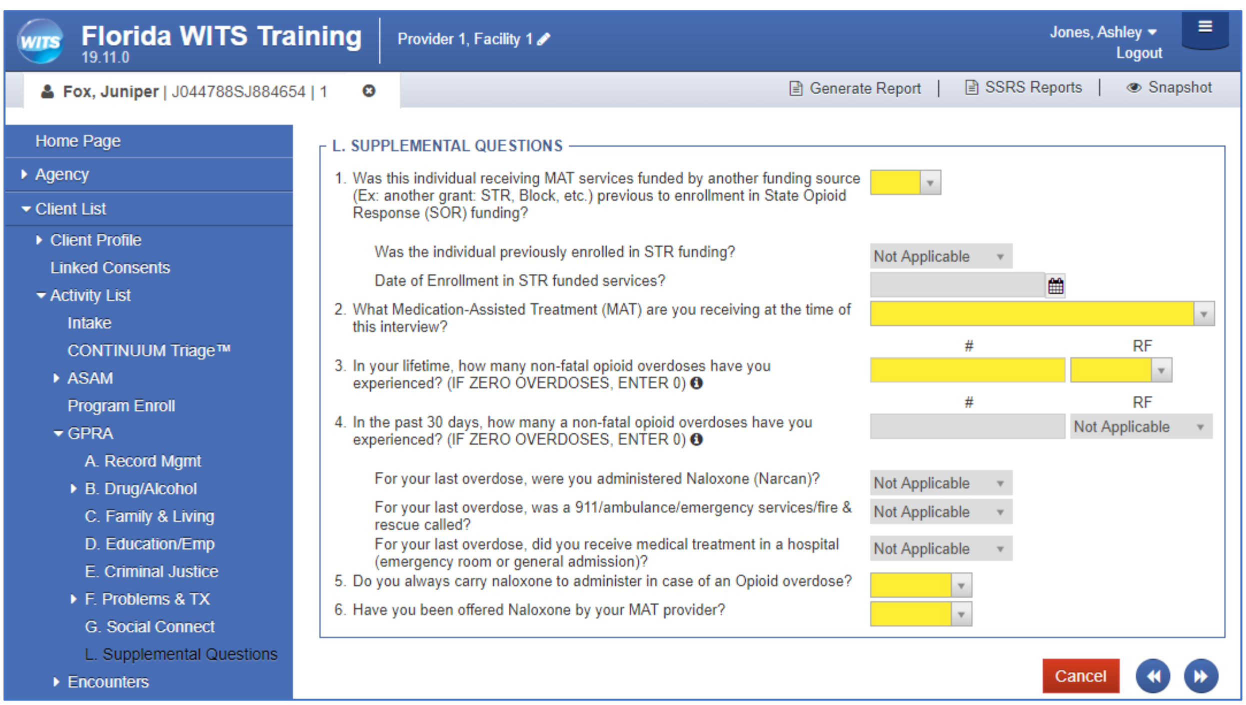


Figure 5-2: New Interview, Supplemental Questions

For all pre-existing GPRA Intake, GPRA Follow-up and GPRA Discharge interviews, the Supplemental Questions screen will be displayed with a default value of "Not Applicable" in all the questions as shown in Figure 5-3 below.

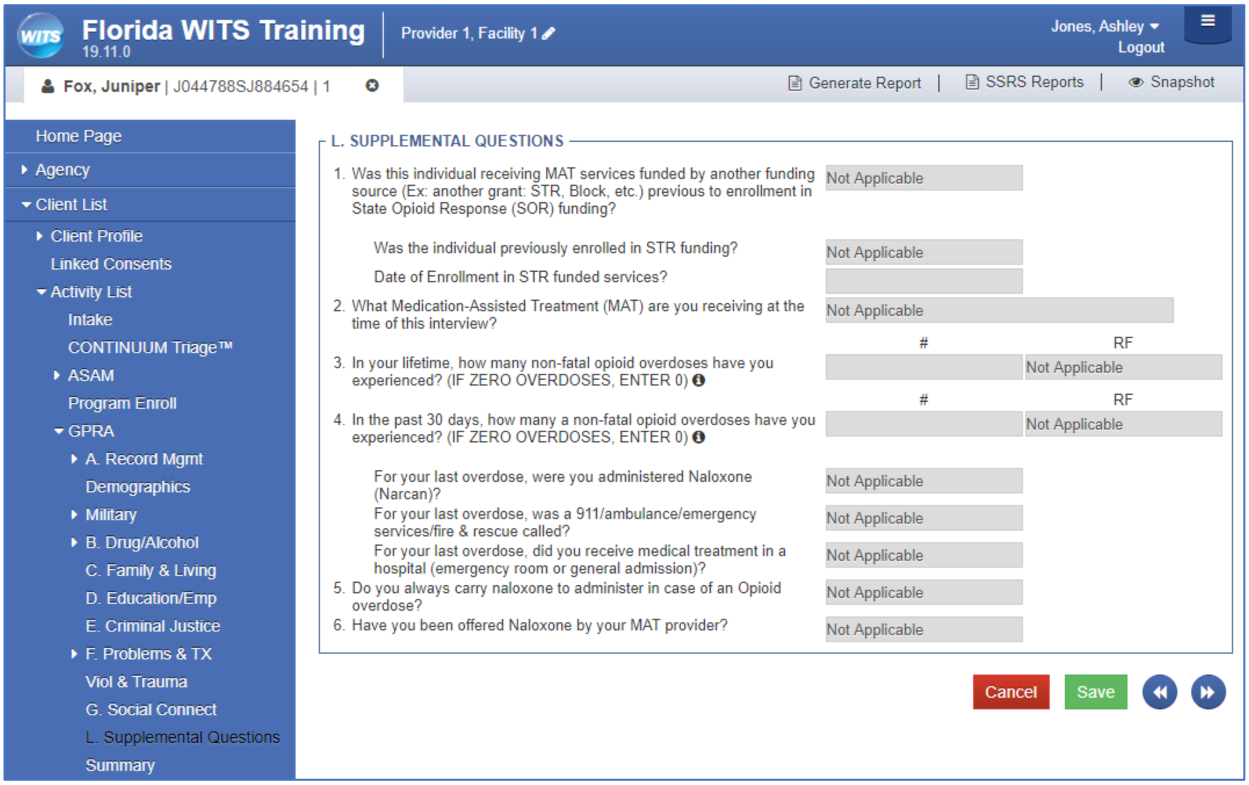


Figure 5-3: Pre-Existing GPRA Interview, Supplemental Questions screen default values

When a user clicks "**Yes**" to generate a completed discharge GPRA interview based on a follow-up GPRA interview, as shown in Figure 5-4, all values from the follow-up interview will be auto-populated to the discharge interview, including values from the Supplemental Questions section.

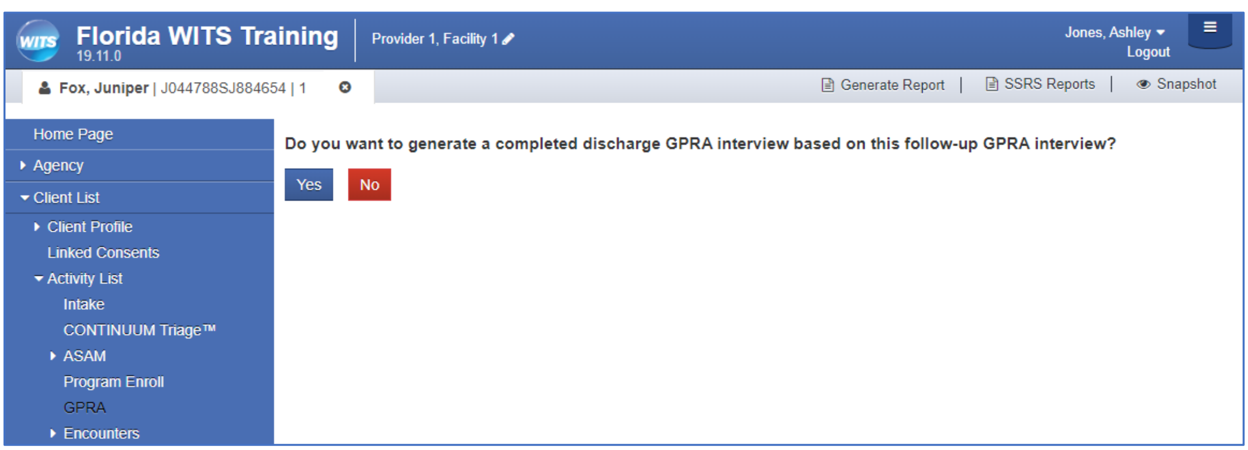


Figure 5-4: Generate a Completed Discharge GPRA based on this Follow-up GPRA screen

An informational icon is displayed on questions 3 and 4. When a user hovers over the informational icon, the following text is displayed:

> "Non-Fatal Opioid Overdose: A non-fatal incident where an individual has consumed (ingested/inhaled/injected) opioids resulting in loss of consciousness with respiratory and circulatory compromise requires medical intervention via naloxone administration and/or CPR and/or assisted ventilation"

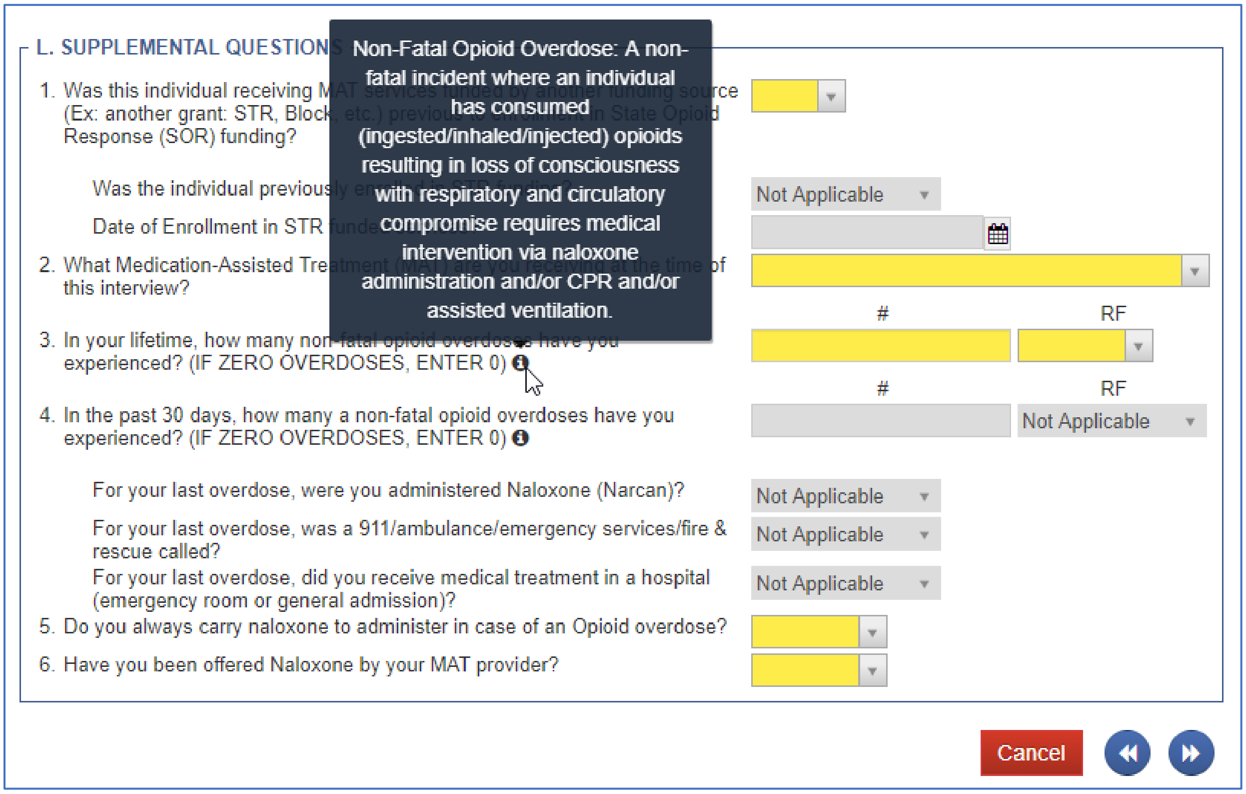


Figure 5-5: Supplemental Questions Informational Icon

Part 6: Post-Discharge Interviews

Two (2) Post-Discharge GPRA interviews are now required with the SOR grant for longer-term tracking of a client's progress. These interviews will be completed at 3 months and 6 months post Discharge and the GPRA questions have been "streamlined" with fewer required fields. Staff will notice some sections/questions are now read-only or hidden from view.

A completed GPRA Discharge is required before these post-discharge interviews can be added.

> **Note**: Clients can only have one "3-Month Post Discharge" and one "6-Month Post Discharge" created per grant episode.

After the GPRA Discharge is complete, the GPRA list screen will display the "Add GPRA 3-Month Post Discharge" link. Once the 3-Month Post Discharge interview is complete, the list screen will display the "Add GPRA 6-Month Post Discharge" link.

Streamlined GPRA Questions

Staff can ask "streamlined" GPRA questions for the 3-Month and 6-Month Post Discharge interviews.

All "streamlined" GPRA questions and responses must be collected on the following screens:

- **A. RECORD MANAGEMENT** (1st screen)
- **B. DRUG AND ALCOHOL USE** (# 2a - 2c9) and (# 2d - 4)
- **C. FAMILY AND LIVING CONDITIONS** (# 1 - 3)
- **D. EDUCATION, EMPLOYMENT, AND INCOME** (# 1, 3 and 5)
- **E. CRIME AND CRIMINAL JUSTICE STATUS** (# 1 and 2)
- **F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATMENT/RECOVERY** (# 1, 2c, 3a, 3b and 5)
- **G. SOCIAL CONNECTEDNESS** (#1 – 3)
- **L. SUPPLEMENTAL QUESTIONS**

3-Month Post-Discharge Interview

GPRA 3-Month Post-Discharge Interview should be added 3 months after a client's GPRA Discharge Interview Date. To add a 3-month post-discharge record, follow the steps below.

Note: If the 3-month post-discharge interview has been conducted, **sections B through G** and **section L. Supplemental Questions** must be completed.

If the 3-month post-discharge interview has ***not*** been conducted, **section A** must be completed.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.
2. On the left menu, click **GPRA**.
3. On the GPRA List screen, click **Add GPRA 3-Month Post Discharge**.

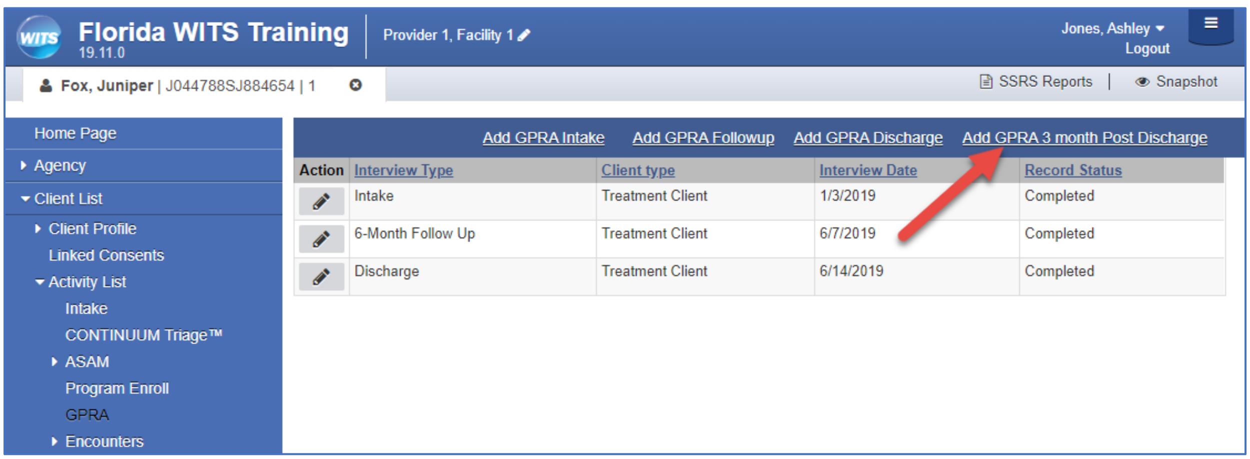


Figure 6-1: GPRA list, Add GPRA 3-Month Post Discharge link

4. The system will display a confirmation screen stating, "You are about to enter a 3-month post-discharge record for this client. Would you like to continue?" Select **Yes** to start the 3-month post-discharge interview.

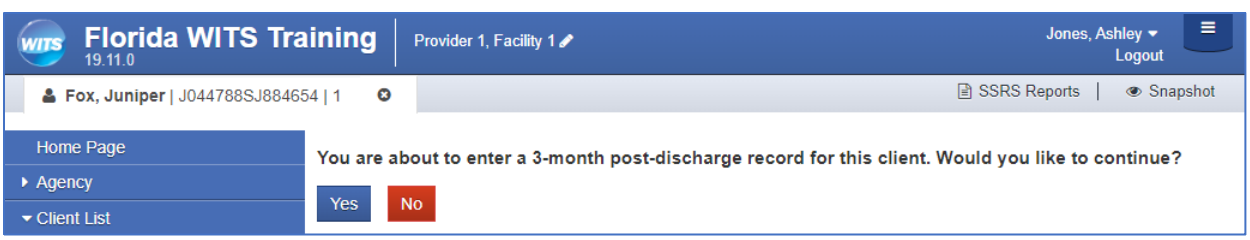
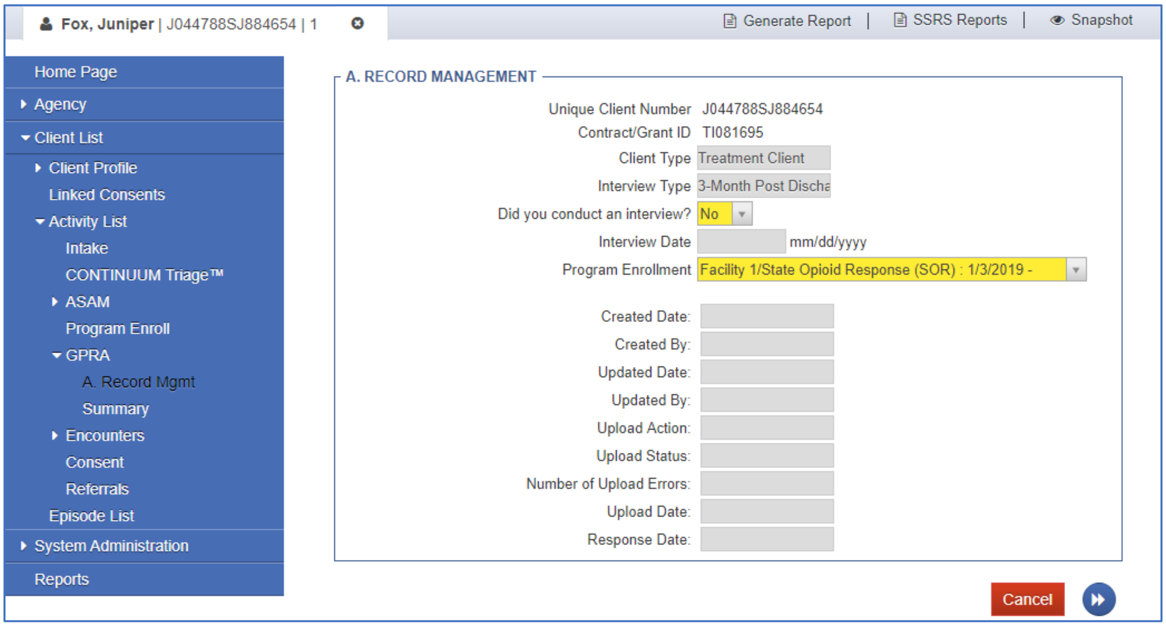


Figure 6-2: 3-Month Post-Discharge Interview Confirmation Screen

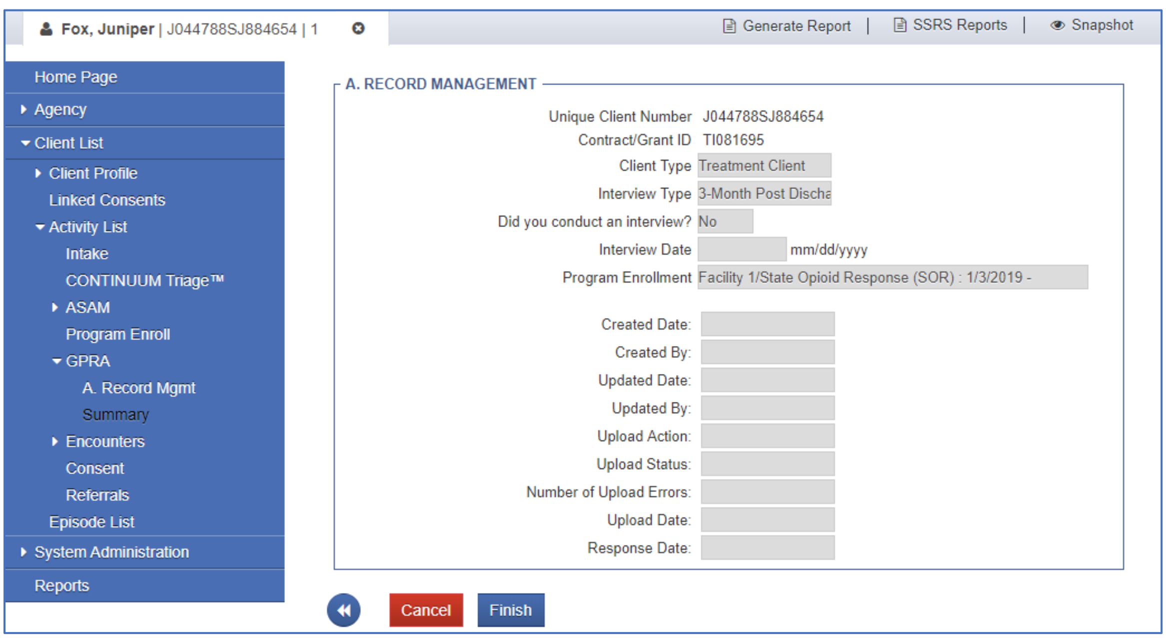
5. When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen.

Interview Was Not Conducted

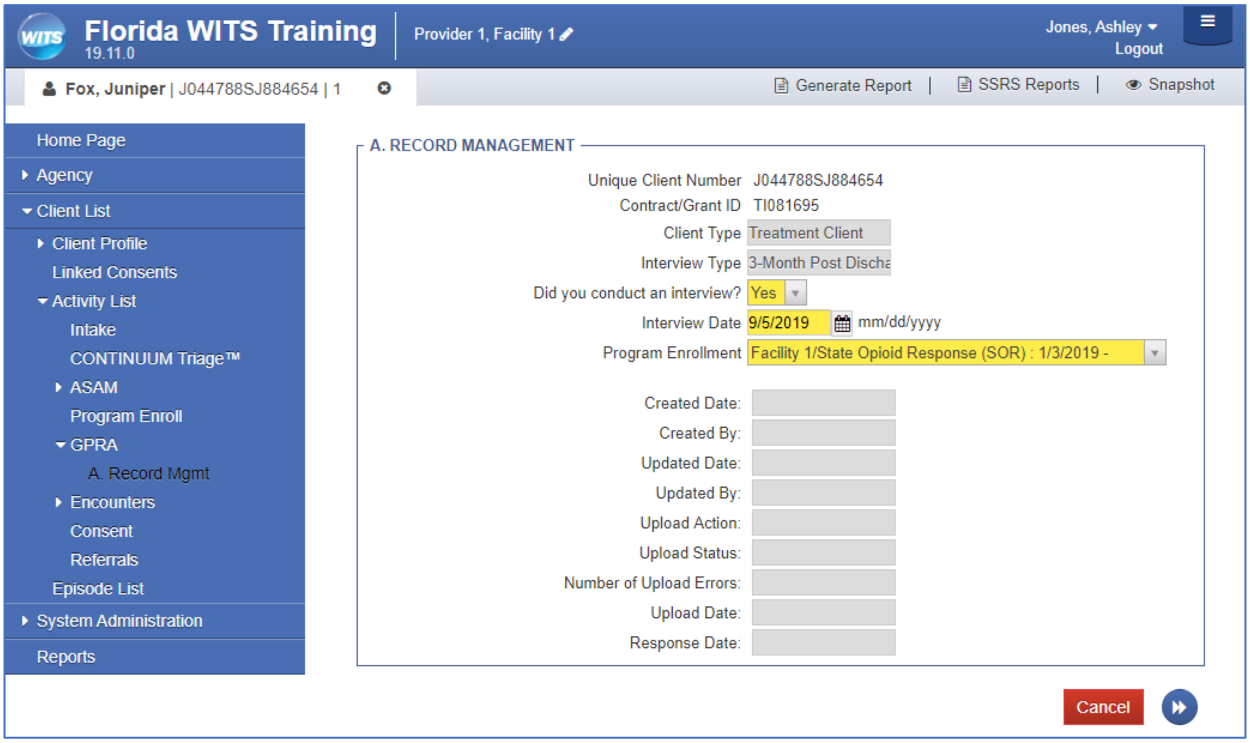
If the 3-Month Post-Discharge interview was not conducted (answered “**No**” to the question “Did you conduct an interview?”), clicking the right-arrow button will display the Summary screen. The Summary screen will only contain the section “A. RECORD MANAGEMENT” details. Note the Supplemental Questions are not available.

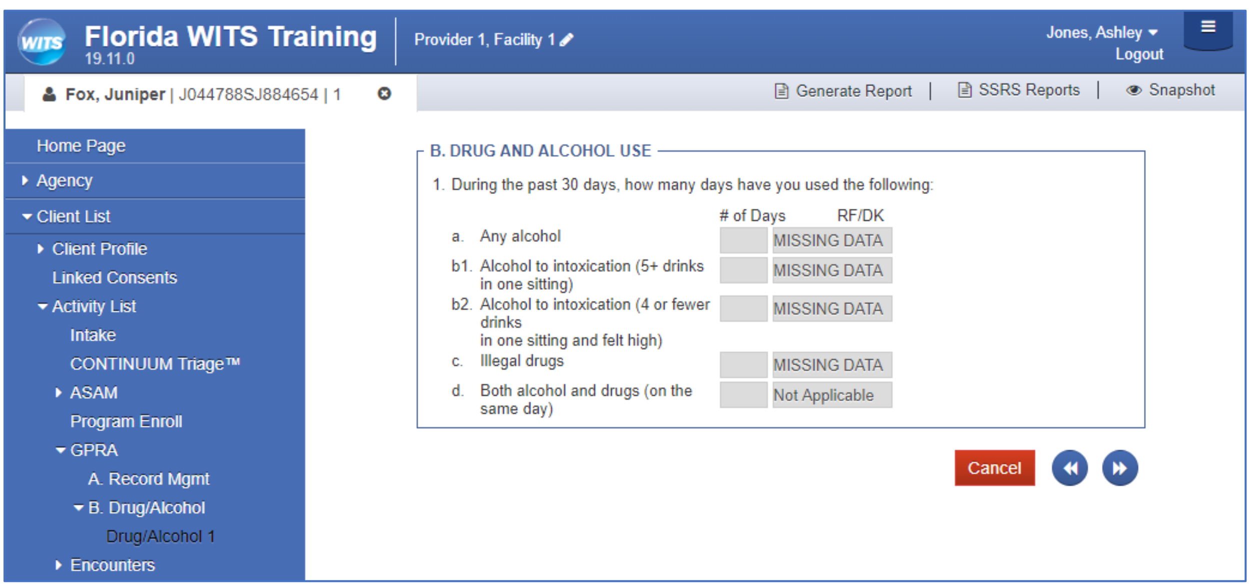


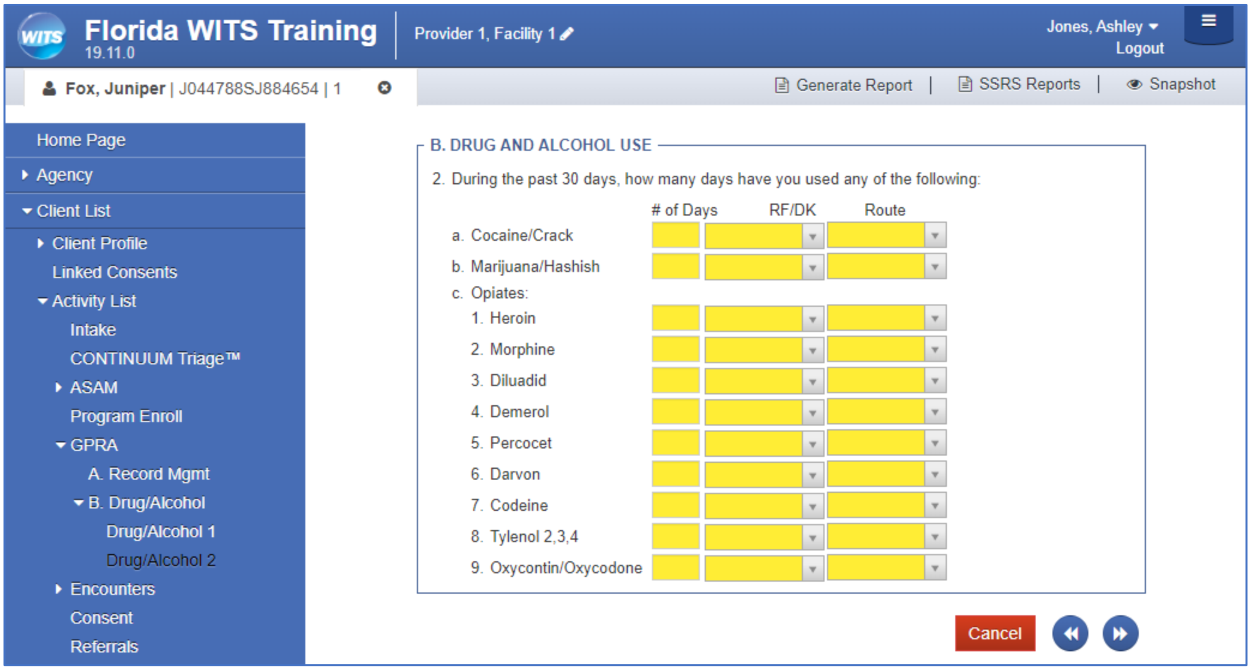
Click **Finish** to complete the post-discharge interview and return to the GPRA list screen.



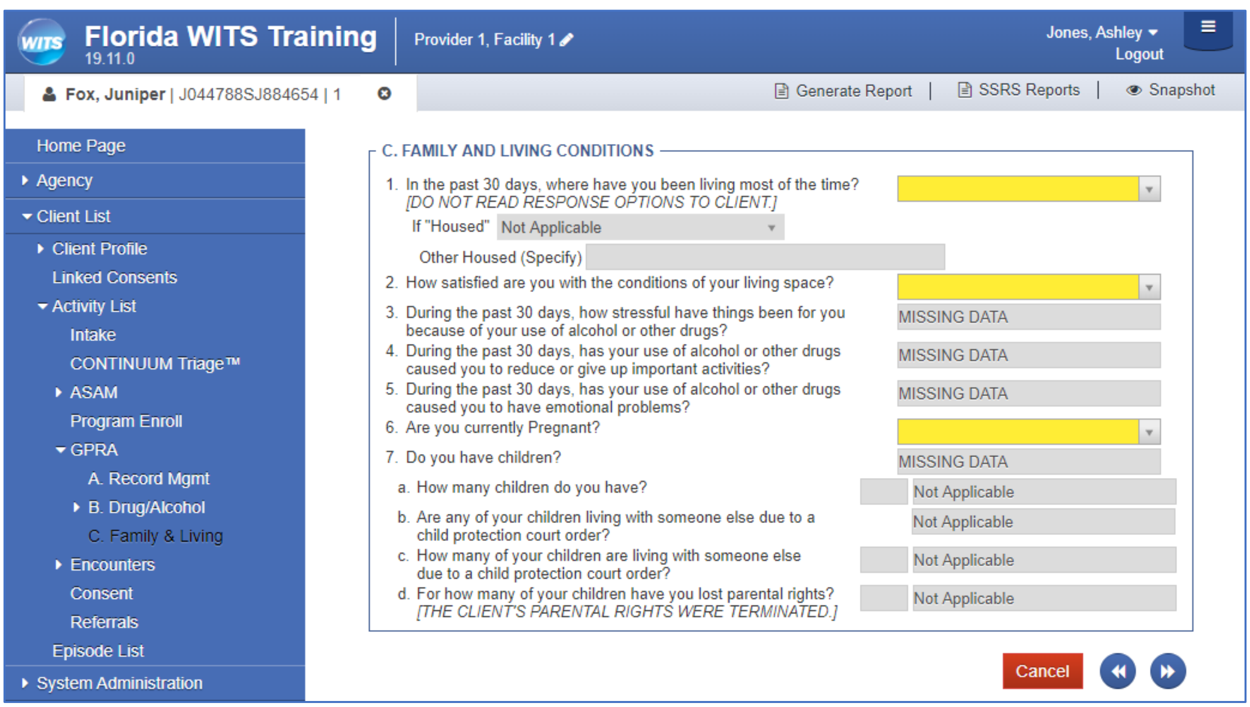
6. If the post-discharge interview was conducted (answered "**Yes**" to the question "Did you conduct an interview?"), clicking the right-arrow button from the Record Management screen will display section B. Drug and Alcohol Use where questions 1.a.-1.d. are read-only.

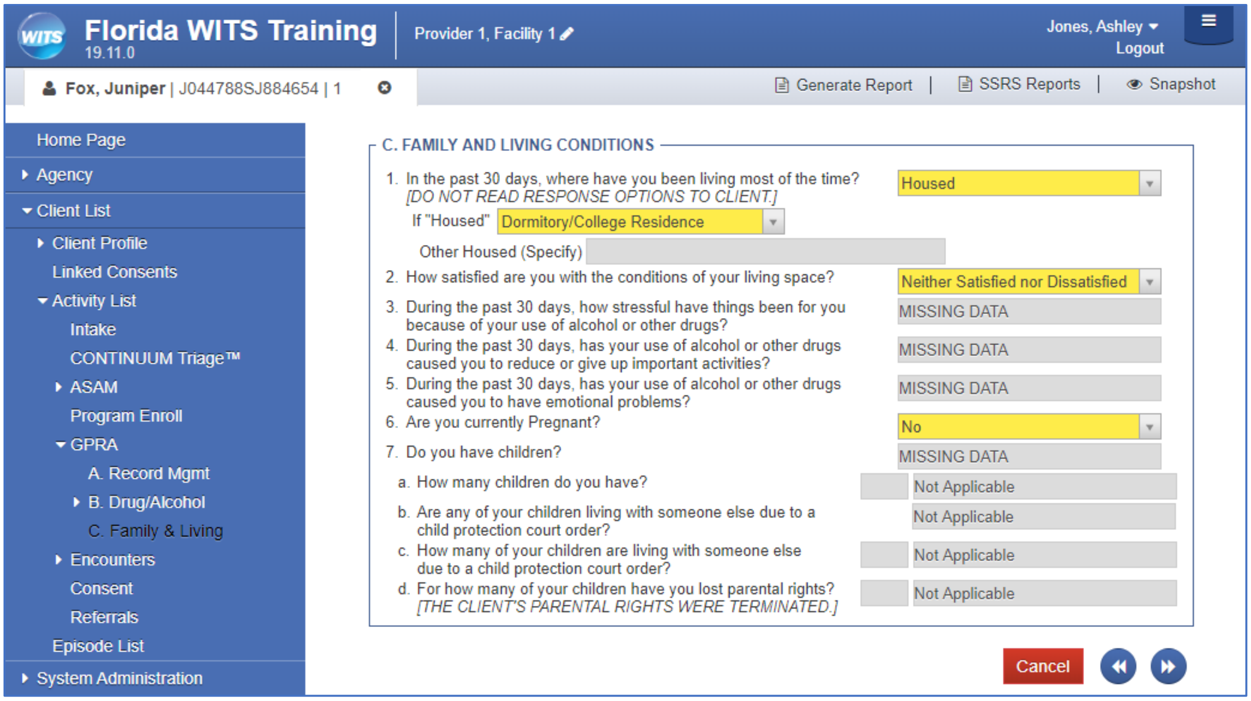


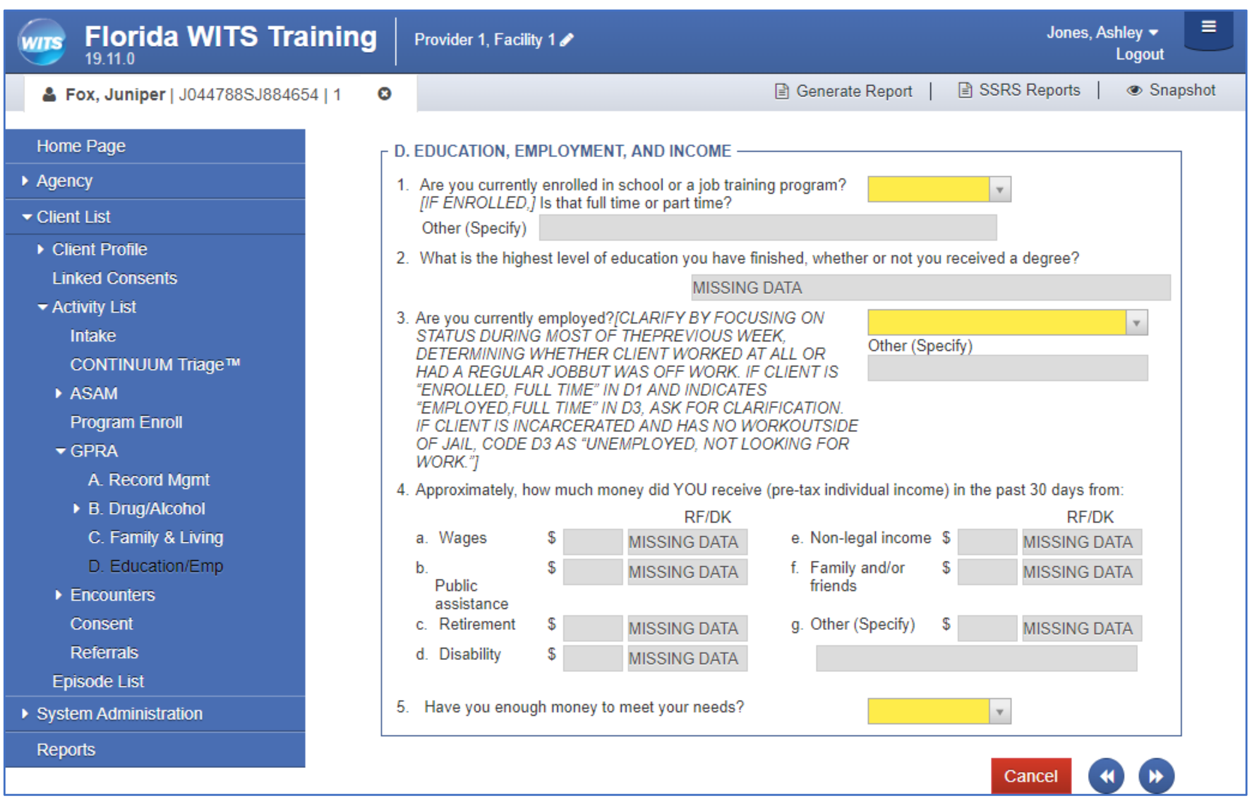


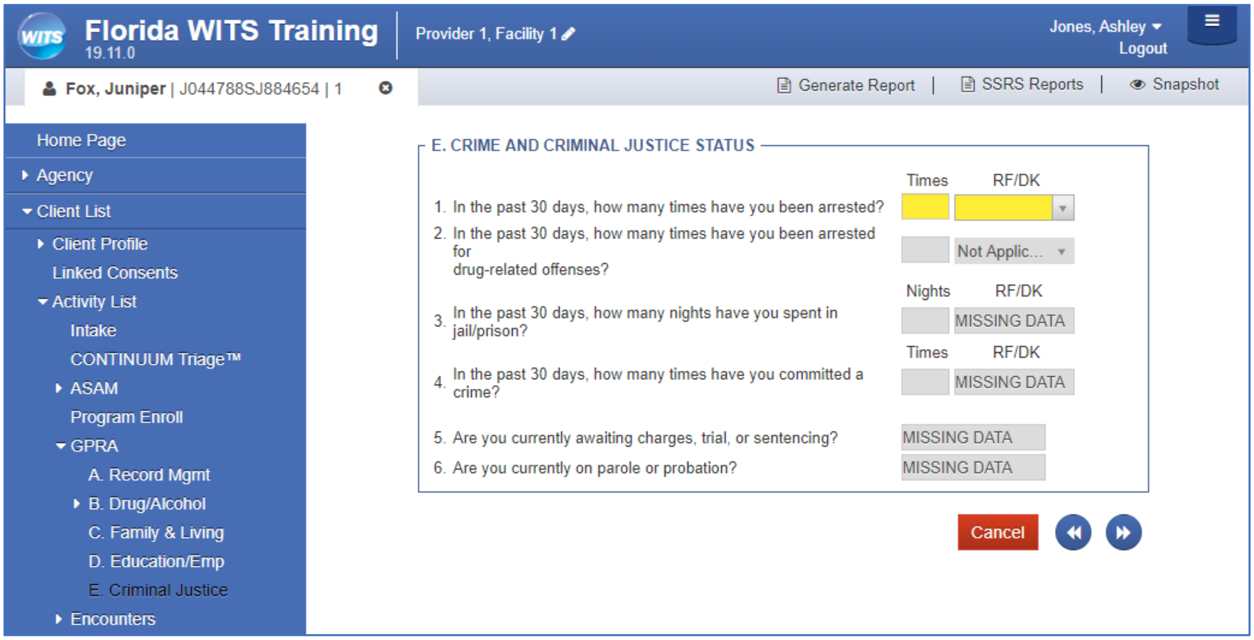


7. Complete the required fields and click the **right-arrow** button to progress to the following screen. On the Summary screen, click **Finish** to complete the interview and return to the GPRA list screen.




Florida WITS Training
19.11.0
Provider 1, Facility 1
Jones, Ashley
Logout
Fox, Juniper | J044788SJ884654 | 1
Generate Report | SSRS Reports | Snapshot
Home Page
Agency
Client List
Client Profile
Linked Consents
Activity List
Intake
CONTINUUM Triage™
ASAM
Program Enroll
GPRA
A. Record Mgmt
B. Drug/Alcohol
C. Family & Living
Encounters
Consent
Referrals
Episode List
System Administration
C. FAMILY AND LIVING CONDITIONS
1. In the past 30 days, where have you been living most of the time? [DO NOT READ RESPONSE OPTIONS TO CLIENT.]
Housed
If "Housed" Dormitory/College Residence
Other Housed (Specify)
2. How satisfied are you with the conditions of your living space?
Neither Satisfied nor Dissatisfied
3. During the past 30 days, how stressful have things been for you because of your use of alcohol or other drugs?
MISSING DATA
4. During the past 30 days, has your use of alcohol or other drugs caused you to reduce or give up important activities?
MISSING DATA
5. During the past 30 days, has your use of alcohol or other drugs caused you to have emotional problems?
MISSING DATA
6. Are you currently Pregnant?
No
7. Do you have children?
MISSING DATA
a. How many children do you have?
Not Applicable
b. Are any of your children living with someone else due to a child protection court order?
Not Applicable
c. How many of your children are living with someone else due to a child protection court order?
Not Applicable
d. For how many of your children have you lost parental rights? [THE CLIENT'S PARENTAL RIGHTS WERE TERMINATED.]
Not Applicable
Cancel


Florida WITS Training
19.11.0
Provider 1, Facility 1
Jones, Ashley
Logout
Fox, Juniper | J044788SJ884654 | 1
Generate Report | SSRS Reports | Snapshot
Home Page
Agency
Client List
Client Profile
Linked Consents
Activity List
Intake
CONTINUUM Triage™
ASAM
Program Enroll
GPRA
A. Record Mgmt
B. Drug/Alcohol
C. Family & Living
D. Education/Emp
Encounters
Consent
Referrals
Episode List
System Administration
Reports
D. EDUCATION, EMPLOYMENT, AND INCOME
1. Are you currently enrolled in school or a job training program? [IF ENROLLED,] Is that full time or part time?
Other (Specify)
2. What is the highest level of education you have finished, whether or not you received a degree?
MISSING DATA
3. Are you currently employed?[CLARIFY BY FOCUSING ON STATUS DURING MOST OF THEPREVIOUS WEEK, DETERMINING WHETHER CLIENT WORKED AT ALL OR HAD A REGULAR JOBBUT WAS OFF WORK. IF CLIENT IS "ENROLLED, FULL TIME" IN D1 AND INDICATES "EMPLOYED,FULL TIME" IN D3, ASK FOR CLARIFICATION. IF CLIENT IS INCARCERATED AND HAS NO WORKOUTSIDE OF JAIL, CODE D3 AS "UNEMPLOYED, NOT LOOKING FOR WORK."]
Other (Specify)
4. Approximately, how much money did YOU receive (pre-tax individual income) in the past 30 days from:
RF/DK
RF/DK
a. Wages $ MISSING DATA
b. Public assistance $ MISSING DATA
c. Retirement $ MISSING DATA
d. Disability $ MISSING DATA
e. Non-legal income $ MISSING DATA
f. Family and/or friends $ MISSING DATA
g. Other (Specify) $ MISSING DATA
5. Have you enough money to meet your needs?
Cancel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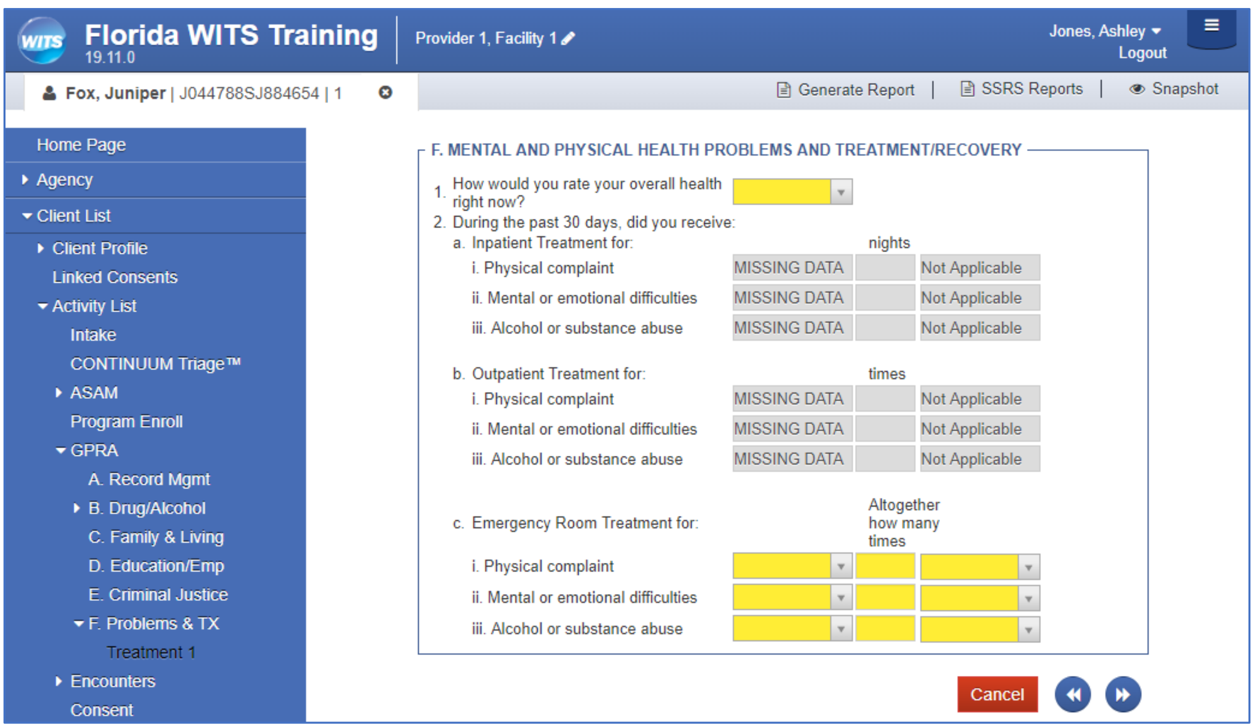
A. Record Mgmt
B. Drug/Alcohol
C. Family & Living
D. Education/Emp
E. Criminal Justice
Encounters
E. CRIME AND CRIMINAL JUSTICE STATUS
Times
RF/DK
1. In the past 30 days, how many times have you been arrested?
2. In the past 30 days, how many times have you been arrested for drug-related offenses?
Not Applic...
Nights
RF/DK
3. In the past 30 days, how many nights have you spent in jail/prison?
MISSING DATA
Times
RF/DK
4. In the past 30 days, how many times have you committed a crime?
MISSING DATA
5. Are you currently awaiting charges, trial, or sentencing?
MISSING DATA
6. Are you currently on parole or probation?
MISSING DATA
Cancel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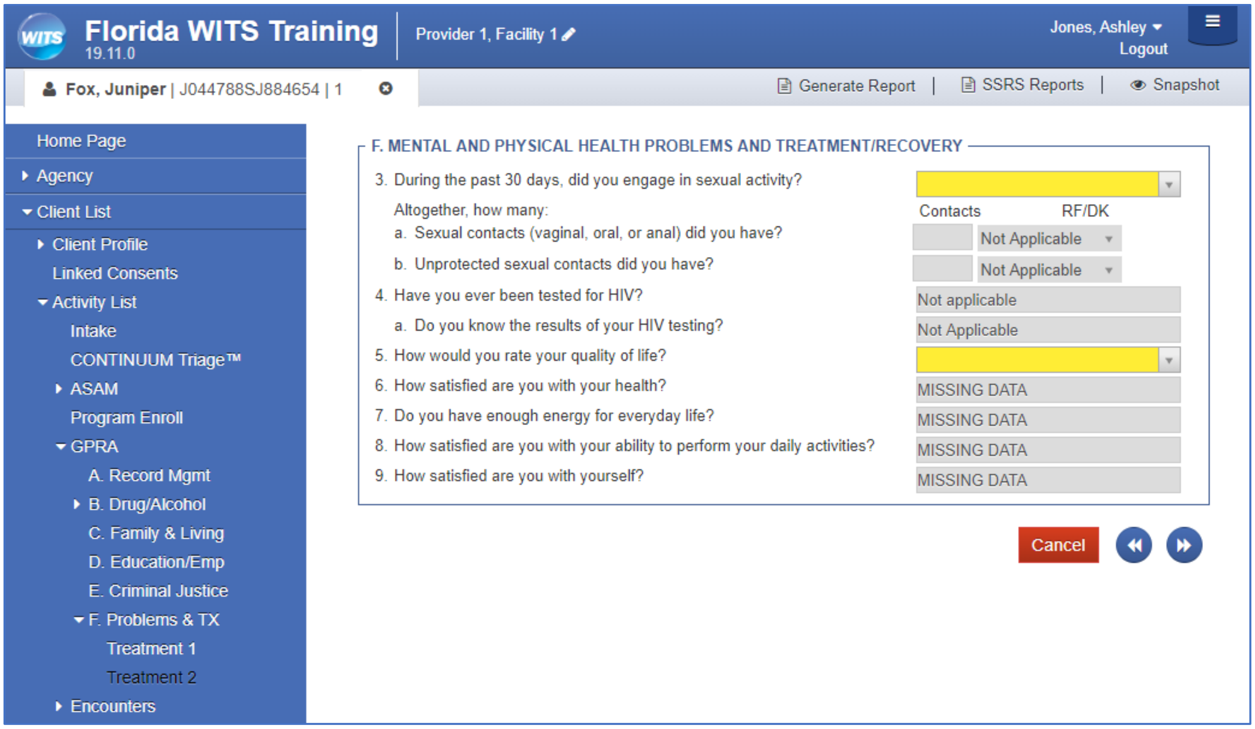
ASAM
Program Enroll
GPRA
A. Record Mgmt
B. Drug/Alcohol
C. Family & Living
D. Education/Emp
E. Criminal Justice
F. Problems & TX
Treatment 1
Encounters
Consent
F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATMENT/RECOVERY
1. How would you rate your overall health right now?
2. During the past 30 days, did you receive:
a. Inpatient Treatment for:
nights
i. Physical complaint
MISSING DATA
Not Applicable
ii. Mental or emotional difficulties
MISSING DATA
Not Applicable
iii. Alcohol or substance abuse
MISSING DATA
Not Applicable
b. Outpatient Treatment for:
times
i. Physical complaint
MISSING DATA
Not Applicable
ii. Mental or emotional difficulties
MISSING DATA
Not Applicable
iii. Alcohol or substance abuse
MISSING DATA
Not Applicable
c. Emergency Room Treatment for:
Altogether how many times
i. Physical complaint
ii. Mental or emotional difficulties
iii. Alcohol or substance abuse
Cancel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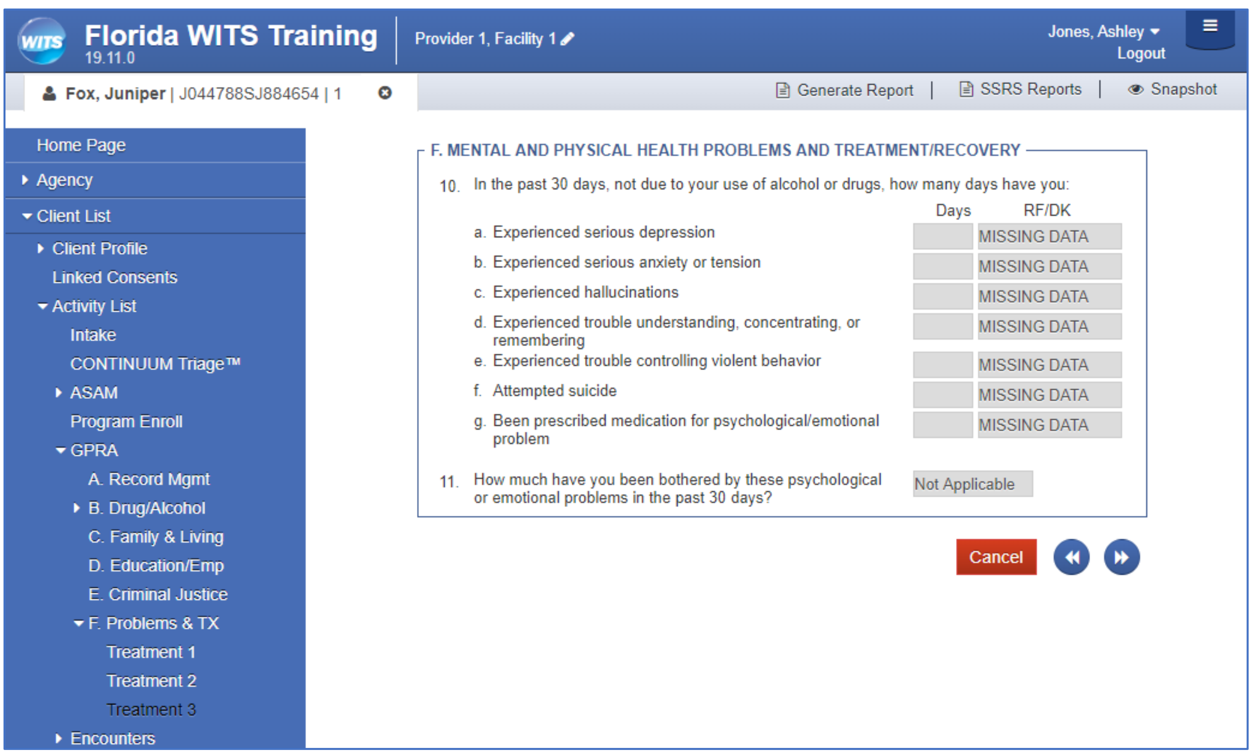
A. Record Mgmt
B. Drug/Alcohol
C. Family & Living
D. Education/Emp
E. Criminal Justice
F. Problems & TX
Treatment 1
Treatment 2
Encounters
F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATMENT/RECOVERY
3. During the past 30 days, did you engage in sexual activity?
Altogether, how many:
Contacts
RF/DK
a. Sexual contacts (vaginal, oral, or anal) did you have?
Not Applicable
b. Unprotected sexual contacts did you have?
Not Applicable
4. Have you ever been tested for HIV?
Not applicable
a. Do you know the results of your HIV testing?
Not Applicable
5. How would you rate your quality of life?
6. How satisfied are you with your health?
MISSING DATA
7. Do you have enough energy for everyday life?
MISSING DATA
8. How satisfied are you with your ability to perform your daily activities?
MISSING DATA
9. How satisfied are you with yourself?
MISSING DATA
Cancel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Provider 1, Facility 1
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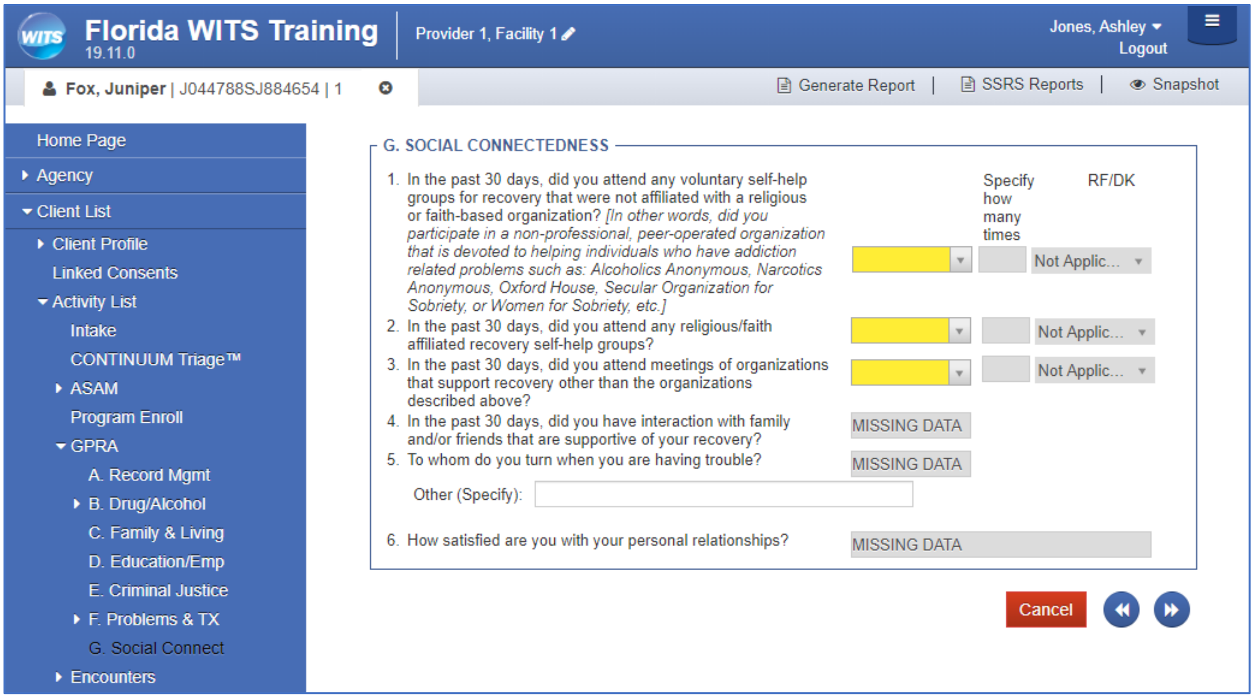
A. Record Mgmt
B. Drug/Alcohol
C. Family & Living
D. Education/Emp
E. Criminal Justice
F. Problems & TX
Treatment 1
Treatment 2
Treatment 3
Encounters
F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATMENT/RECOVERY
10. In the past 30 days, not due to your use of alcohol or drugs, how many days have you:
Days
RF/DK
a. Experienced serious depression
MISSING DATA
b. Experienced serious anxiety or tension
MISSING DATA
c. Experienced hallucinations
MISSING DATA
d. Experienced trouble understanding, concentrating, or remembering
MISSING DATA
e. Experienced trouble controlling violent behavior
MISSING DATA
f. Attempted suicide
MISSING DATA
g. Been prescribed medication for psychological/emotional problem
MISSING DATA
11. How much have you been bothered by these psychological or emotional problems in the past 30 days?
Not Applicable
Cancel


Florida WITS Training
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Provider 1, Facility 1
Jones, Ashley
Logout
Fox, Juniper | J044788SJ884654 | 1
Generate Report
SSRS Reports
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Agency
Client List
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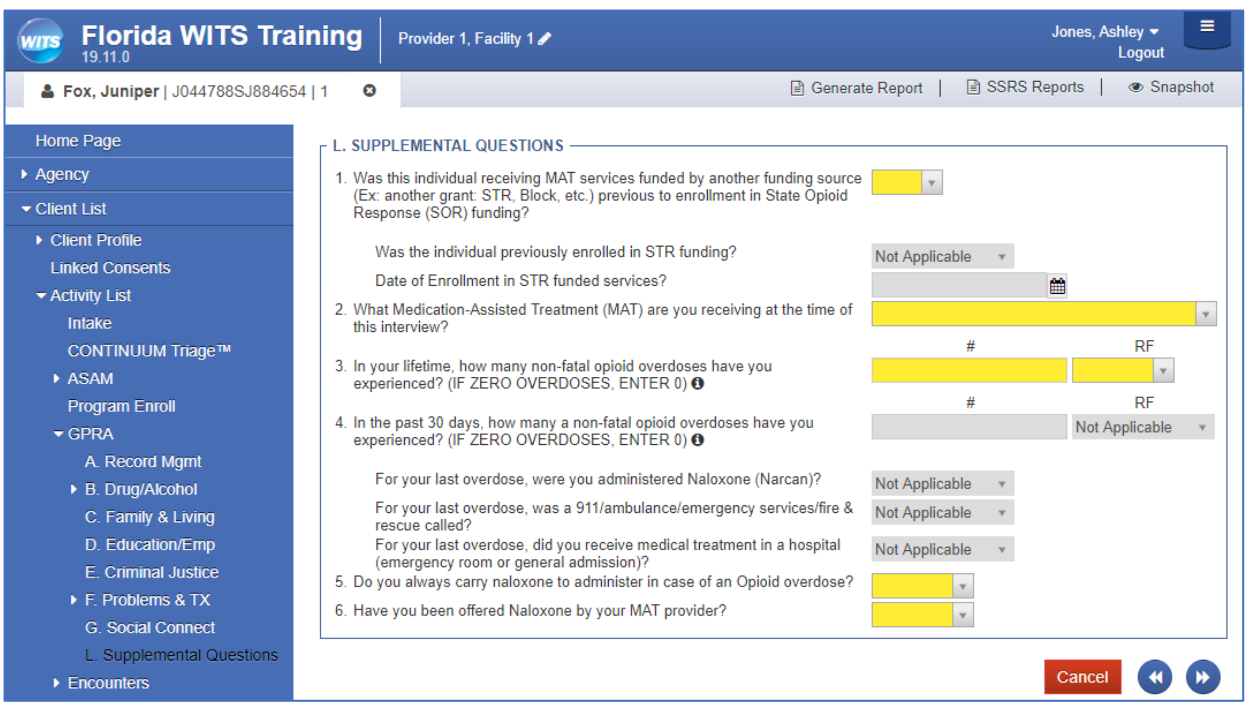
Activity List
Intake
CONTINUUM Triage™
ASAM
Program Enroll
GPRA
A. Record Mgmt
B. Drug/Alcohol
C. Family & Living
D. Education/Emp
E. Criminal Justice
F. Problems & TX
G. Social Connect
Encounters
G. SOCIAL CONNECTEDNESS
1. In the past 30 days, did you attend any voluntary self-help groups for recovery that were not affiliated with a religious or faith-based organization? [In other words, did you participate in a non-professional, peer-operated organization that is devoted to helping individuals who have addiction related problems such as: Alcoholics Anonymous, Narcotics Anonymous, Oxford House, Secular Organization for Sobriety, or Women for Sobriety, etc.]
Specify how many times
RF/DK
Not Applic...
2. In the past 30 days, did you attend any religious/faith affiliated recovery self-help groups?
Not Applic...
3. In the past 30 days, did you attend meetings of organizations that support recovery other than the organizations described above?
Not Applic...
4. In the past 30 days, did you have interaction with family and/or friends that are supportive of your recovery?
MISSING DATA
5. To whom do you turn when you are having trouble?
MISSING DATA
Other (Specify):
6. How satisfied are you with your personal relationships?
MISSING DATA
Cancel


Florida WITS Training
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Provider 1, Facility 1
Jones, Ashley
Logout
Fox, Juniper | J044788SJ884654 | 1
Generate Report
SSRS Reports
Snapshot
Home Page
Agency
Client List
Client Profile
Linked Consents
Activity List
Intake
CONTINUUM Triage™
ASAM
Program Enroll
GPRA
A. Record Mgmt
B. Drug/Alcohol
C. Family & Living
D. Education/Emp
E. Criminal Justice
F. Problems & TX
G. Social Connect
L. Supplemental Questions
Encounters
L. SUPPLEMENTAL QUESTIONS
1. Was this individual receiving MAT services funded by another funding source (Ex: another grant: STR, Block, etc.) previous to enrollment in State Opioid Response (SOR) funding?
Was the individual previously enrolled in STR funding?
Not Applicable
Date of Enrollment in STR funded services?
2. What Medication-Assisted Treatment (MAT) are you receiving at the time of this interview?
#
RF
3. In your lifetime, how many non-fatal opioid overdoses have you experienced? (IF ZERO OVERDOSES, ENTER 0)
#
RF
4. In the past 30 days, how many a non-fatal opioid overdoses have you experienced? (IF ZERO OVERDOSES, ENTER 0)
Not Applicable
For your last overdose, were you administered Naloxone (Narcan)?
Not Applicable
For your last overdose, was a 911/ambulance/emergency services/fire & rescue called?
Not Applicable
For your last overdose, did you receive medical treatment in a hospital (emergency room or general admission)?
Not Applicable
5. Do you always carry naloxone to administer in case of an Opioid overdose?
6. Have you been offered Naloxone by your MAT provider?
Cancel

G. SOCIAL CONNECTEDNESS

		Specify how many times	RF/DK
1. In the past 30 days, did you attend any voluntary self-help groups for recovery that were not affiliated with a religious or faith-based organization? *[In other words, did you participate in a non-professional, peer-operated organization that is devoted to helping individuals who have addiction related problems such as: Alcoholics Anonymous, Narcotics Anonymous, Oxford House, Secular Organization for Sobriety, or Women for Sobriety, etc.]*	No		Not Applicable
2. In the past 30 days, did you attend any religious/faith affiliated recovery self-help groups?	No		Not Applicable
3. In the past 30 days, did you attend meetings of organizations that support recovery other than the organizations described above?	Yes	2	
4. In the past 30 days, did you have interaction with family and/or friends that are supportive of your recovery?	MISSING DATA		
5. To whom do you turn when you are having trouble?	MISSING DATA		
Other (Specify):			
6. How satisfied are you with your personal relationships?	MISSING DATA		

L. SUPPLEMENTAL QUESTIONS

	#	RF
1. Was this individual receiving MAT services funded by another funding source (Ex: another grant: STR, Block, etc.) previous to enrollment in State Opioid Response (SOR) funding?	Yes	
Was the individual previously enrolled in STR funding?	No	
Date of Enrollment in STR funded services?		
2. What Medication-Assisted Treatment (MAT) are you receiving at the time of this interview?	Buprenorphine-Combo (Suboxone)	
3. In your lifetime, how many non-fatal opioid overdoses have you experienced? (IF ZERO OVERDOSES, ENTER 0)	1	
4. In the past 30 days, how many a non-fatal opioid overdoses have you experienced? (IF ZERO OVERDOSES, ENTER 0)	1	
For your last overdose, were you administered Naloxone (Narcan)?	Yes	
For your last overdose, was a 911/ambulance/emergency services/fire & rescue called?	Yes	
For your last overdose, did you receive medical treatment in a hospital (emergency room or general admission)?	Yes	
5. Do you always carry naloxone to administer in case of an Opioid overdose?	No	
6. Have you been offered Naloxone by your MAT provider?	Yes	

Cancel Finish

6-Month Post-Discharge Interview

The 6-Month Post-Discharge Interview should be added 6 months after a client's GPRA Discharge Interview Date and after a 3-month post-discharge record has been completed. To add a 6-month post-discharge record, follow the steps below.

> **Note**: If the 6-month post-discharge interview has been conducted, **sections B through G** and the Supplemental Questions must be completed.
>
> If the 6-month post-discharge interview has ***not*** been conducted, **section A** must be completed.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.

2. On the left menu, click **GPRA**.

3. On the GPRA List screen, click **Add GPRA 6-Month Post Discharge**.

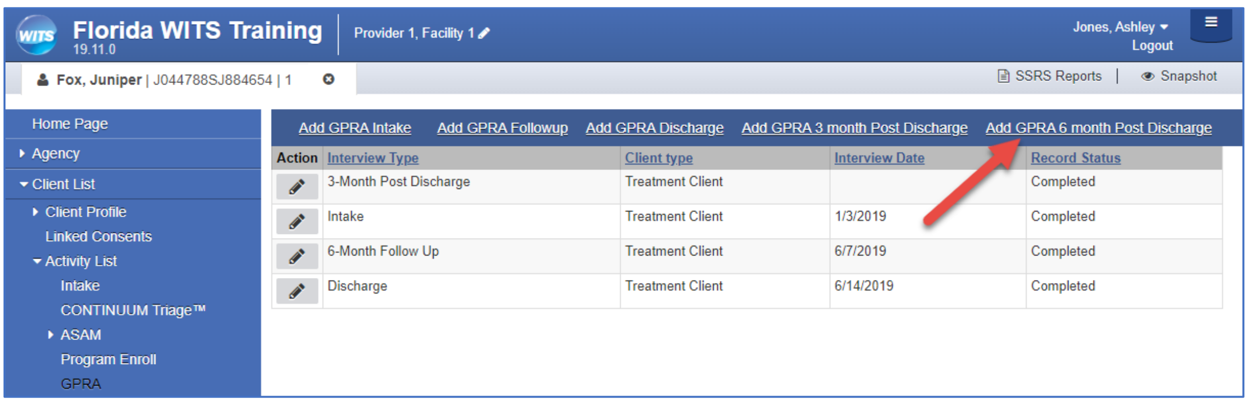


Figure 6-3: GPRA list, Add GPRA 6-Month Post Discharge link

4. The system will display a confirmation screen stating, "You are about to enter a 6-month post-discharge record for this client. Would you like to continue?" Select **Yes** to start the 6-month post-discharge interview.

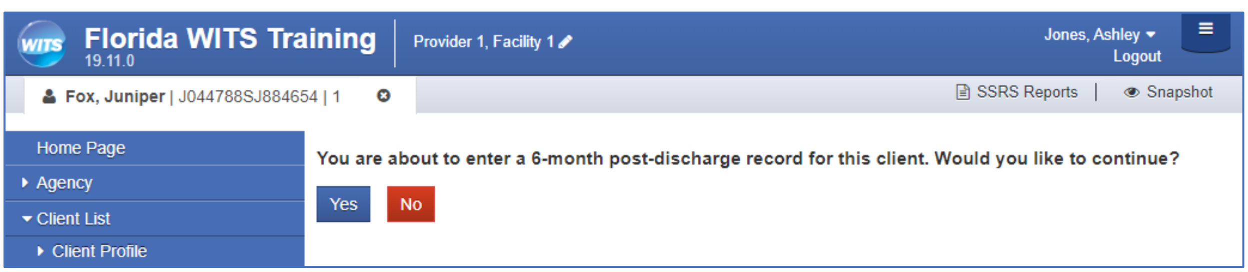


Figure 6-4: 6-Month Post-Discharge Interview Confirmation Screen

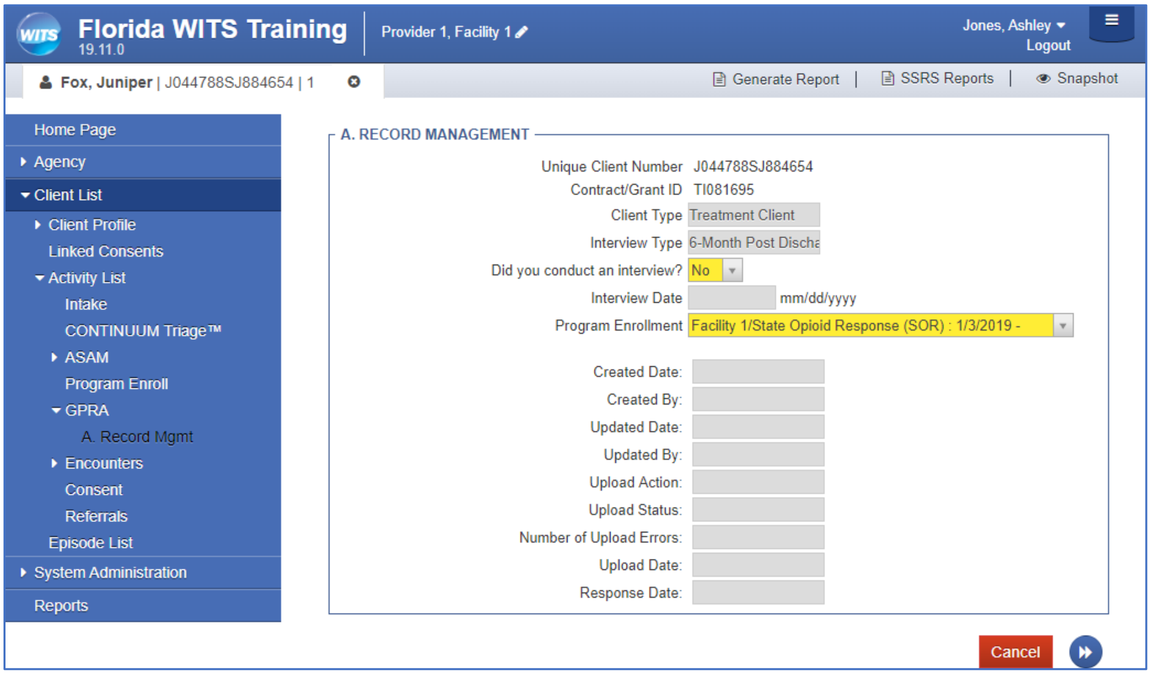
5. When the interview opens to section A. Record Management, complete the required fields and click the **right-arrow** button to progress to the next screen.

6. If the post-discharge interview was conducted (answered "**Yes**" to the question "Did you conduct an interview?"), clicking the right-arrow button from the Record Management screen will display section B. Drug and Alcohol Use where questions 1.a.-1.d. are read-only.

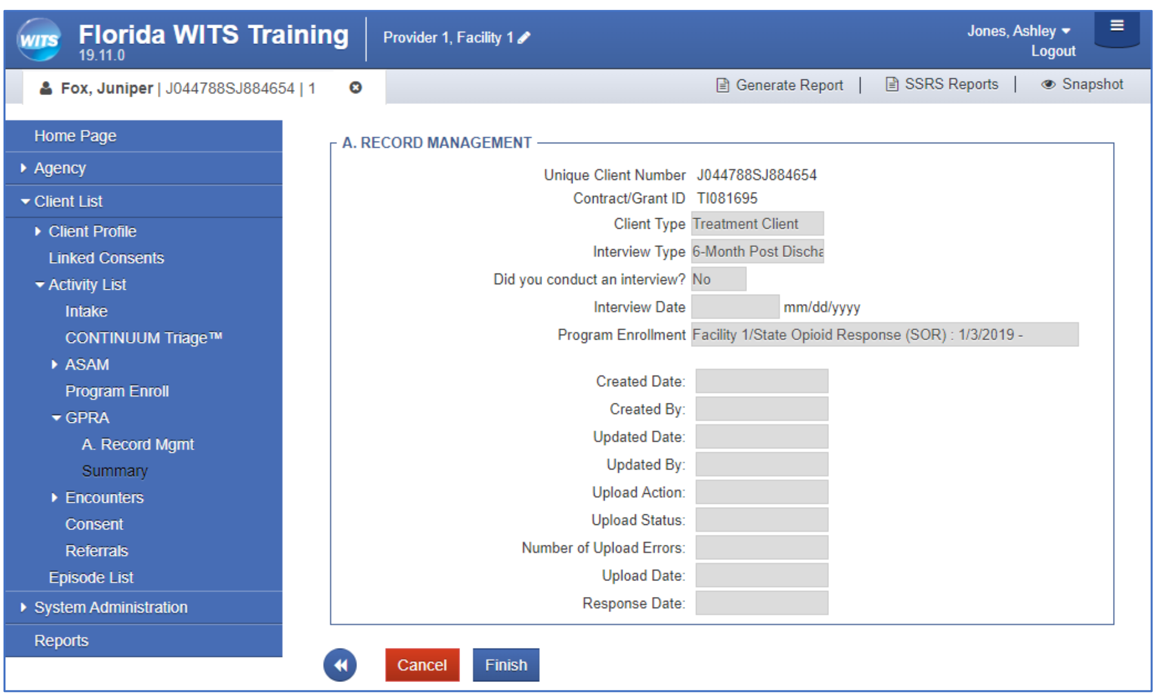
7. Complete the required fields and click the **right-arrow** button to progress to the following screen. On the Summary screen, click **Finish** to complete the interview and return to the GPRA list screen.

Interview Was Not Conducted

If the 6-Month Post-Discharge interview was not conducted (answered "**No**" to the question "Did you conduct an interview?"), clicking the right-arrow button will display the Summary screen. The Summary screen will only contain the section "A. RECORD MANAGEMENT" details. Note the Supplemental Questions are not available.



Click **Finish** to complete the post-discharge interview and return to the GPRA list screen.



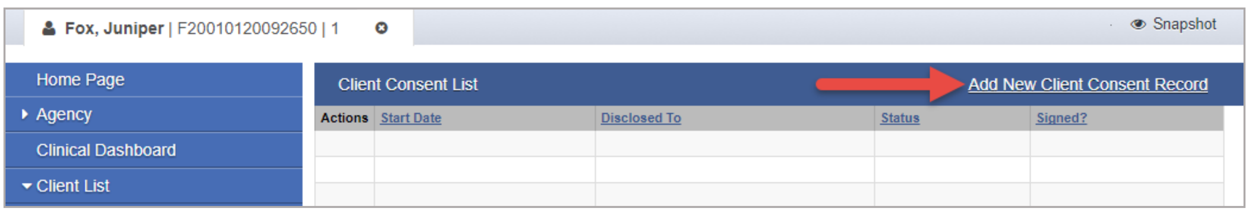
Part 7: Consent and Referrals

Create Client Consent Record

***Where:* Client List > Activity List > Consent**

The consent is a formal process adhering to 42 CFR Part 2, which governs the sharing of client information between agencies and facilities using WITS. A consent may also be used to record the sharing of information (on paper) with agencies who do not use WITS, making the consent part of the electronic health record.

1. On the left menu, click **Client List** and search for a client.
2. Locate the client, hover over the Actions column, and then click **Activity List**.
3. On the left menu, click **Consent**.
4. Click the **Add New Client Consent Record** link.



5. Select **No**.

6. On the Client Disclosure Agreement screen, complete the following fields.

Table 7-1: Client Disclosure Agreement fields

Field	Description
Entities with Disclosure Agreements	Select from the drop-down list. This field will display a list of agencies that have previously created a Disclosure template. This will prepopulate fields in the "Client Information To Be Consented" section, which can then be modified if needed.
System Agency	Select "Yes" if the agency uses WITS.
Disclosed to Agency	Select the agency that will be receiving the client's information.
Facility	Select the facility within the selected Agency that will be receiving the client's information. Select All Facilities, or an individual facility.
Purpose for Disclosure	Type the reason for creating the Consent record.
Earliest date of services to be consented	Select the date.
Has the client signed the paper agreement form	Select "No" to save the screen and have the client sign the paper form (see below), after client has signed, select "Yes".

Field	Description
Date client signed consent	This field will become editable when "Yes" is selected in the previous field.

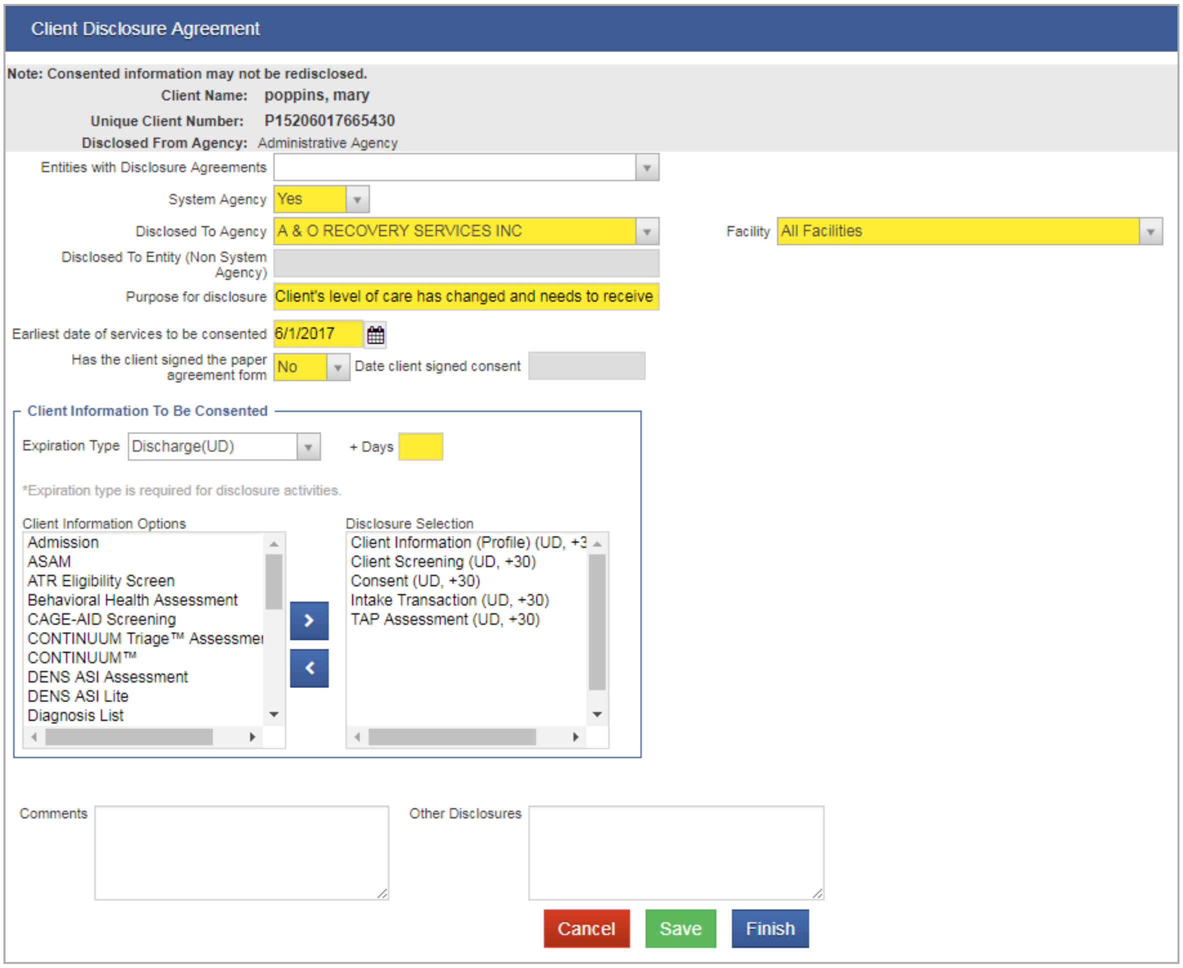


Figure 7-1: Client Disclosure Agreement screen

7. If additional consent information needs to be added or removed from the client's disclosure agreement, update the options from the "Client Information To Be Consented" section. Your agency administrator may have set up templates for the disclosure agreement.

Table 7-2: Client Information To Be Consented fields

Field	Description
Expiration Type and + Days	Select either "Discharge (UD)" or "Date Signed (DS)", then when the yellow field appears, enter the number of days the consent will expire.
Client Information Options/Disclosure Selection	Select options from the box and use the mover buttons to add or remove the desired consent options.

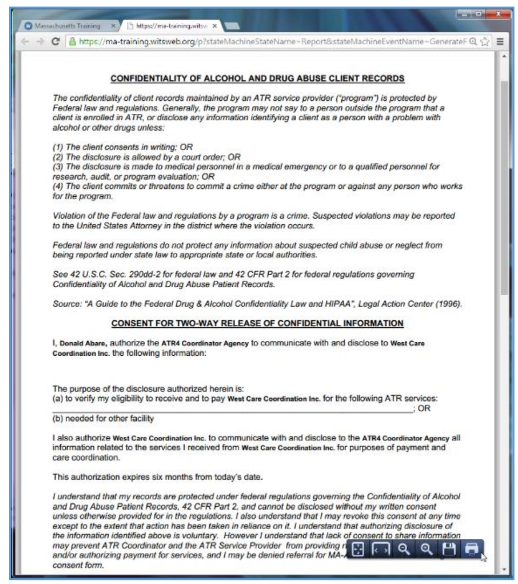
8. When all required fields are complete, click **Save**.

Print the Client Consent Form

9. After saving the Client Disclosure Agreement screen, click the **Generate Report** link to print the Client Consent Form to get the client's signature on the paper copy. The printed consent form includes items from the Client Information Options box along with the Consent Expires information.

Figure 7-2: Client Disclosure Agreement screen, Generate Report

10. Once the client has signed the paper form, update these fields:
    - **Has client signed the paper agreement form**: select "Yes"
    - **Date client signed consent**: defaults to current date
11. Click **Save** and stay on this screen (notice the fields are now grayed out).
12. After saving the client consent, a link to add a Client Referral for this consent will be available. This will open the client referral screen, and will pre-populate the signed consent and Agency fields of the Referred to section.
13. Click the link, **Create Referral Using this Disclosure Agreement**, and continue to the next section.



CONFIDENTIALITY OF ALCOHOL AND DRUG ABUSE CLIENT RECORDS

The confidentiality of client records maintained by an ATR service provider ("program") is protected by Federal law and regulations. Generally, the program may not say to a person outside the program that a client is enrolled in ATR, or disclose any information identifying a client as a person with a problem with alcohol or other drugs unless:

(1) The client consents in writing; OR
(2) The disclosure is allowed by a court order; OR
(3) The disclosure is made to medical personnel in a medical emergency or to a qualified personnel for research, audit, or program evaluation; OR
(4) The client commits or threatens to commit a crime either at the program or against any person who works for the program.

Violation of the Federal law and regulations by a program is a crime. Suspected violations may be reported to the United States Attorney in the district where the violation occurs.

Federal law and regulations do not protect any information about suspected child abuse or neglect from being reported under state law to appropriate state or local authorities.

See 42 U.S.C. Sec. 290dd-2 for federal law and 42 CFR Part 2 for federal regulations governing Confidentiality of Alcohol and Drug Abuse Patient Records.

Source: "A Guide to the Federal Drug & Alcohol Confidentiality Law and HIPAA", Legal Action Center (1996).

CONSENT FOR TWO-WAY RELEASE OF CONFIDENTIAL INFORMATION

I, **Donald Abare,** authorize the **ATR4 Coordinator Agency** to communicate with and disclose to **West Care Coordination Inc.** the following information:

The purpose of the disclosure authorized herein is:
(a) to verify my eligibility to receive and to pay **West Care Coordination Inc.** for the following ATR services: ____________________; OR
(b) needed for other facility

I also authorize **West Care Coordination Inc.** to communicate with and disclose to the **ATR4 Coordinator Agency** all information related to the services I received from **West Care Coordination Inc.** for purposes of payment and care coordination.

This authorization expires six months from today's date.

I understand that my records are protected under federal regulations governing the Confidentiality of Alcohol and Drug Abuse Patient Records, 42 CFR Part 2, and cannot be disclosed without my written consent unless otherwise provided for in the regulations. I also understand that I may revoke this consent at any time except to the extent that action has been taken in reliance on it. I understand that authorizing disclosure of the information identified above is voluntary. However I understand that lack of consent to share information may prevent ATR Coordinator and the ATR Service Provider from providing [illegible] and/or authorizing payment for services, and I may be denied referral for MA-[illegible] consent form.

Printable Consent Form

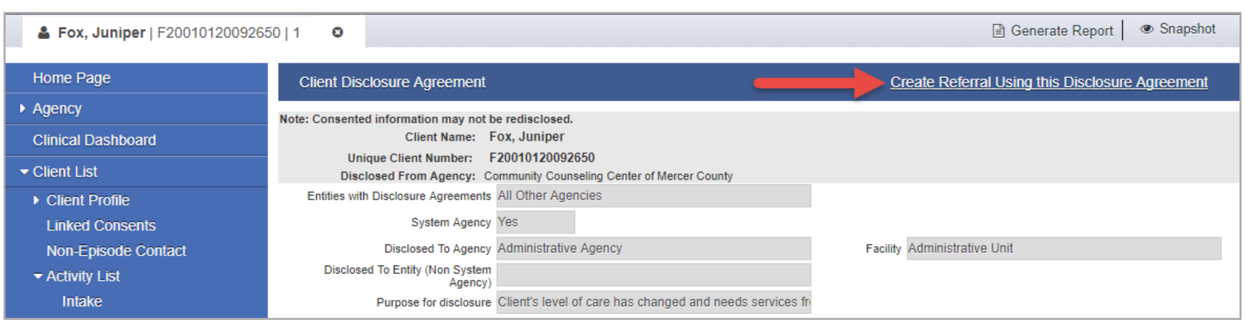


Figure 7-3: Create Referral Using this Disclosure Agreement link

Referrals

Create a Client Referral

***Where:* Client List > Activity List > Referrals**

Continuing from previous section…

Once the Client Consent is complete, create the Client Referral Record. A referral is used when the receiving agency (another WITS agency) will be providing services for the client. Referrals may also be done from one facility to another facility within the same agency.

14. After clicking the **Create Referral Using this Disclosure Agreement** link, the Referral screen will open.

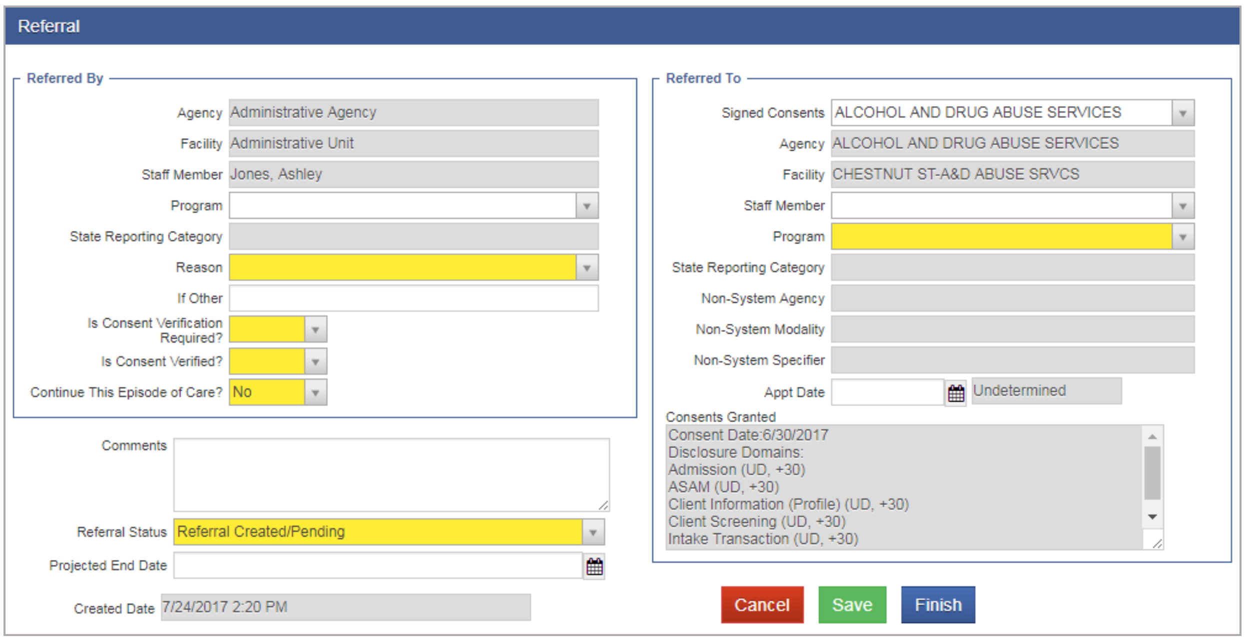


Figure 7-4: Referral screen

15. On the Client Referral screen, complete the required fields in the **Referred By** section, including:

Table 7-3: Referred By fields

Field	Description
Program	Select the Program It should be a referral from a program with the SOR grant to another program with the SOR grant
Reason	In the drop-down field, select the reason why this client is being referred.
Is Consent Verification Required?	Select Yes.
Is Consent Verified?	Select Yes.
Continue Episode of Care?	Select No.
Referral Status	State of the referral (this should be “Referral Created/Pending”).

Field	Description
Created Date	Date client is referred.

16. Next, in the **Referred To** section, complete all the required fields, including:

Table 7-4: Referred To fields

Field	Description
Signed Consents	Select the consent from list of available consents.
Agency	This field will auto populate based on the “Consent” selected.
Facility	The facility the client is being referred to.
Program	The program the client is being referred to. It should be an SOR program.

17. When complete, click **Save**.

Viewing Referrals

Referrals In

***Where:* Agency > Agency List > Referrals > Referrals In**

Whenever clients are referred in to your Agency from another agency, a message will appear on the Home Page as shown in Figure 7-5: Home Page with "referred in" notification. Clients who have been referred in have signed a consent form agreeing to share certain information with your agency. To review these referrals, follow the steps below.

Role Needed:

- Referrals (Full Access)

Note: Only users with the Referrals (Full Access) role will see Referrals left menu link.

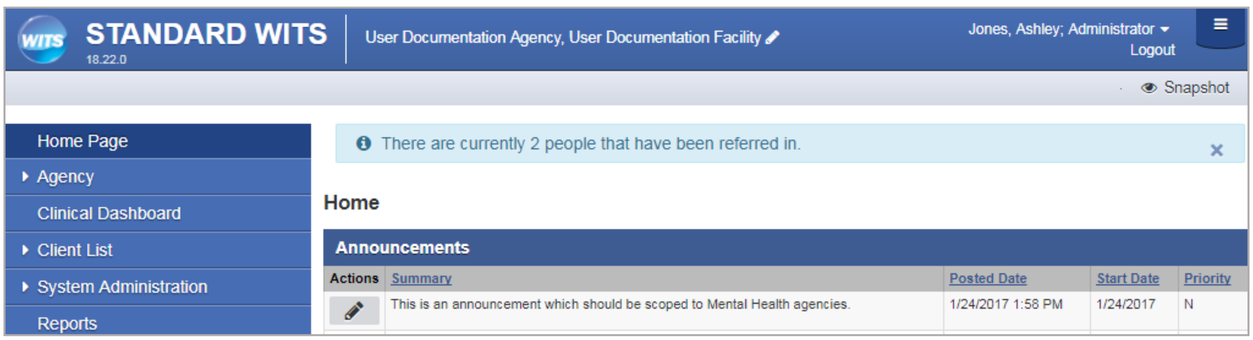


Figure 7-5: Home Page with "referred in" notification

1. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals In**.
2. On the **Referrals In Search** screen, in the **Referral Status Codes** field, select "**Referral Created/Pending**" and move this option to the **Search Criteria** box by clicking the mover button as shown in **Error! Reference source not found.**.
3. After selecting the search criteria, click **Go** to view the search results list.

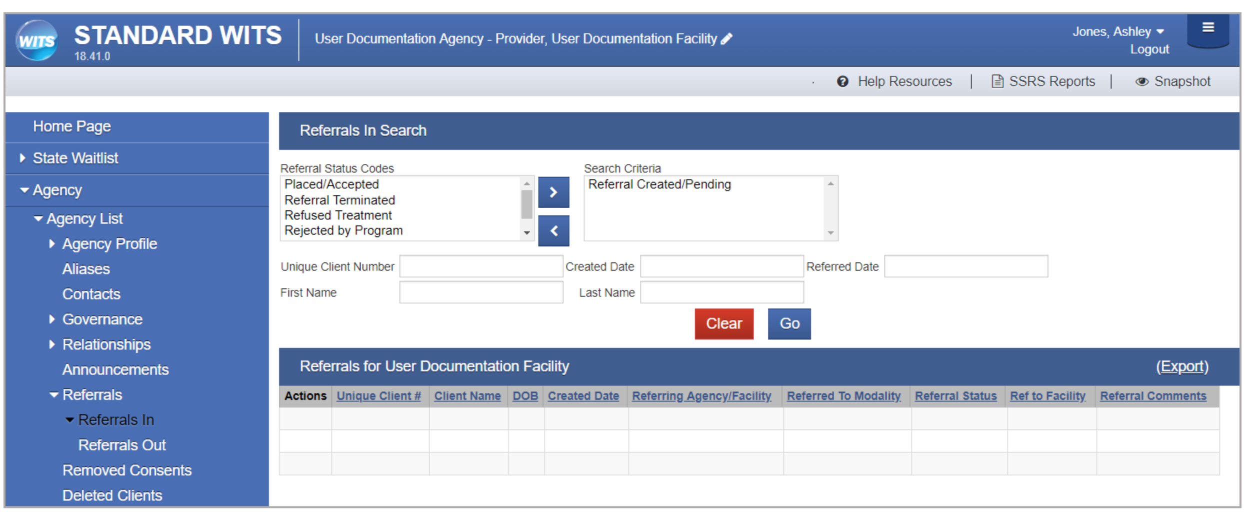


Figure 7-6: Referrals In Search screen

4. Notice that any referred clients will appear in the list portion of the screen. To view a client's referral information, hover over the Actions column, and then click **Review**.

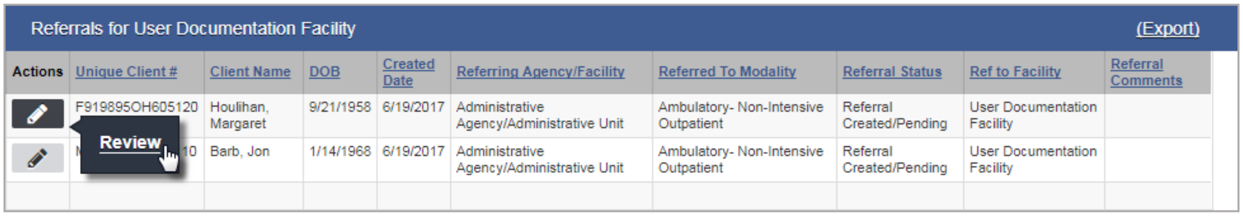


Figure 7-7: Referrals Search Results, Review link

5. To accept the client referral, click on the **Referral Status** field and select "**Placed/Accepted**" from the drop-down list. The client must be accepted into your agency before viewing the client's record, or working on the case.

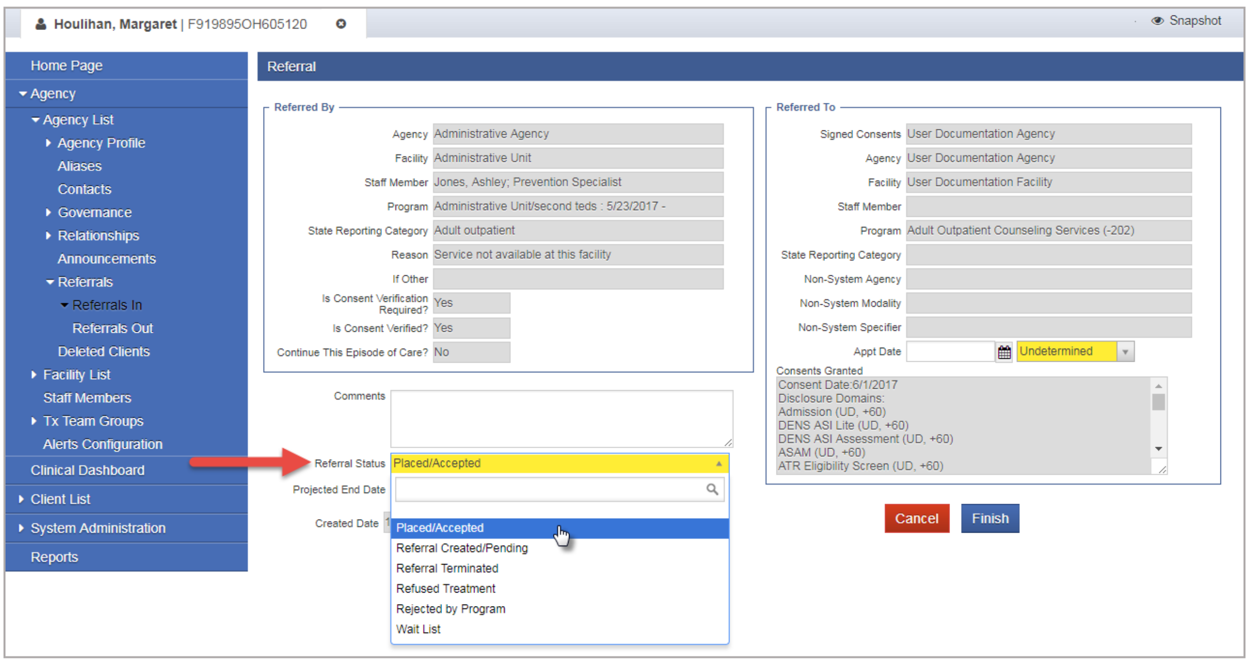


Figure 7-8: Referral screen, Referral Status field

6. (Optional) Next, fill in the **Appointment Date (Appt Date)** and use the drop down box to provide any additional information about the appointment.

7. Click **Finish** to save the record and accept the referral. Note that this action takes you to the Client Profile screen for the client you just accepted.

(Optional) Additional **Referral Status** reasons to select:

- **Referred/Terminated**: When the referral has been deleted by the referring agency.
- **Refused Treatment**: Select if the client does not want to be treated.
- **Rejected by Program**: If the client is not eligible or is not acting in compliance.
- **Wait List**: If the client is waiting for a slot to open in the program.

> **Note**: Once the referral is Placed/Accepted, the client record is created within the Agency, and an Intake and Client Program Enrollment is created within the referred to Facility.

Referrals Out

Where:* *Agency > Agency List > Referrals > Referrals Out

The Referrals Out screen is used to check the status of referrals made from your agency to other agencies.

8. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals Out**.

9. On the **Referrals Out Search** screen, in the **Referral Status Codes** field, select the desired codes and move them to the **Search Criteria** box by clicking the mover button (>).

10. After selecting the search criteria, click **Go** to view the search results list.

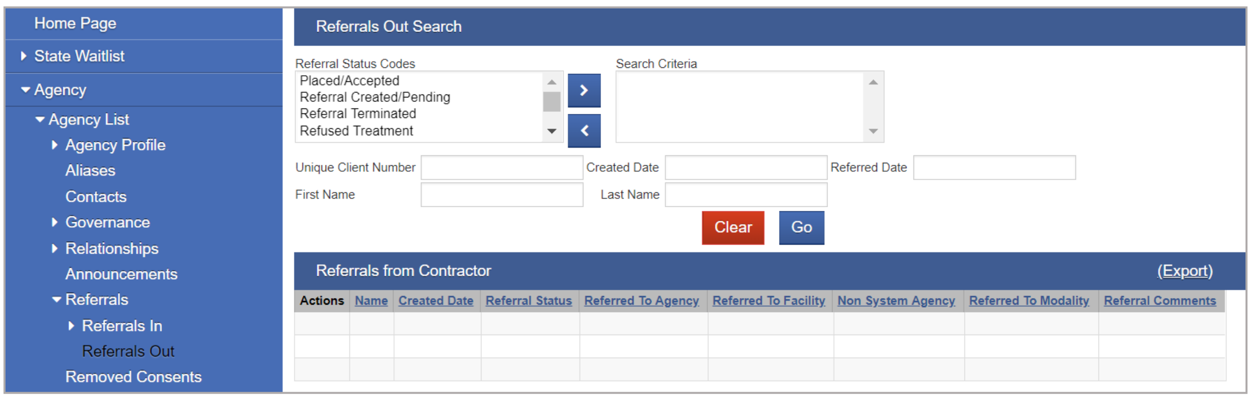


Figure 7-9: Referrals Out screen

Viewing Consented Information Before a Referral is Accepted

Where: Client List Screen

When a Client Consent is completed from one agency to another within WITS, the specific client information contained within that Consent record will be available for the receiving agency to view as read-only.

Role Needed:

- View Consented Clients

Note: Once the receiving agency accepts the Referral, the consented information no longer appears within the Clients with Consents from Outsides Agencies list. The consented information can be located directly within the Client Record – Linked Consents.

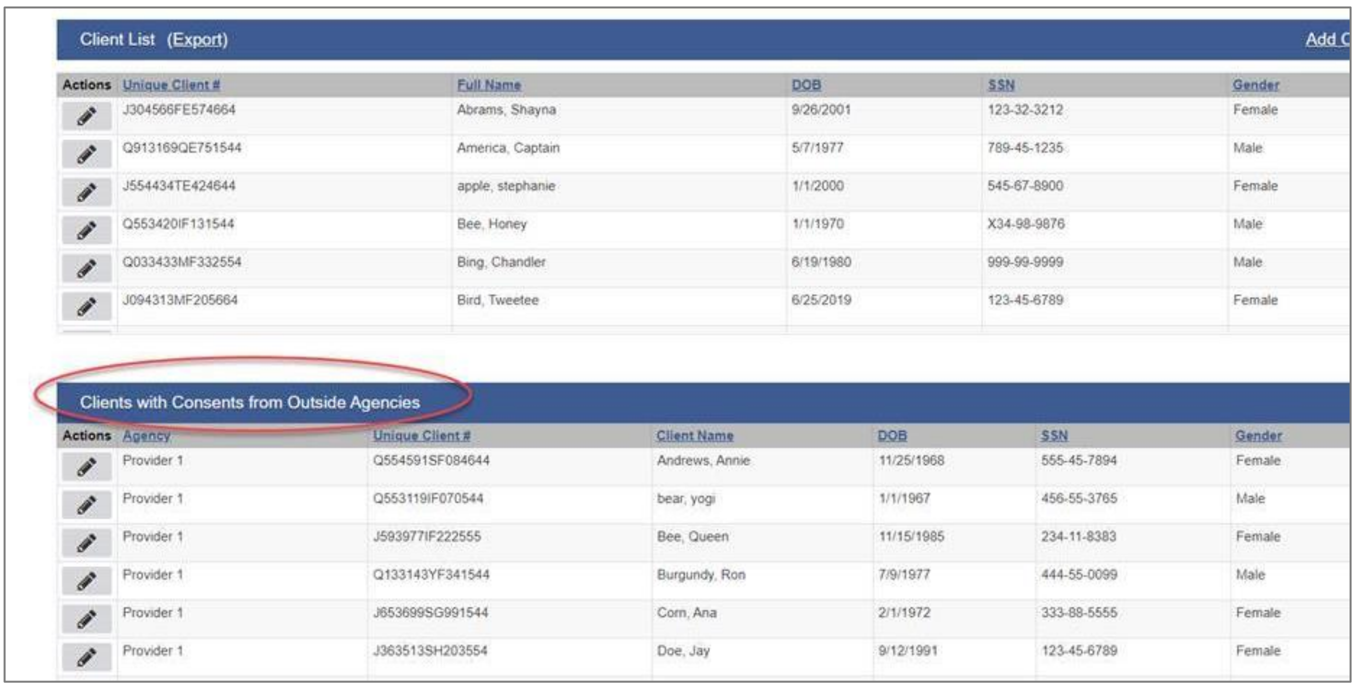


Figure 7-10: Client List Screen

11. On the left menu, click **Client List**.
12. Enter and choose any search parameters to find the client, or search all clients and click **Go**.
13. View the Clients with Consents from Outside Agencies list.

F

Figure 7-11: Selecting the Consented Client's Activity List

14. Find the client record you wish to view, and click **Activity List**.

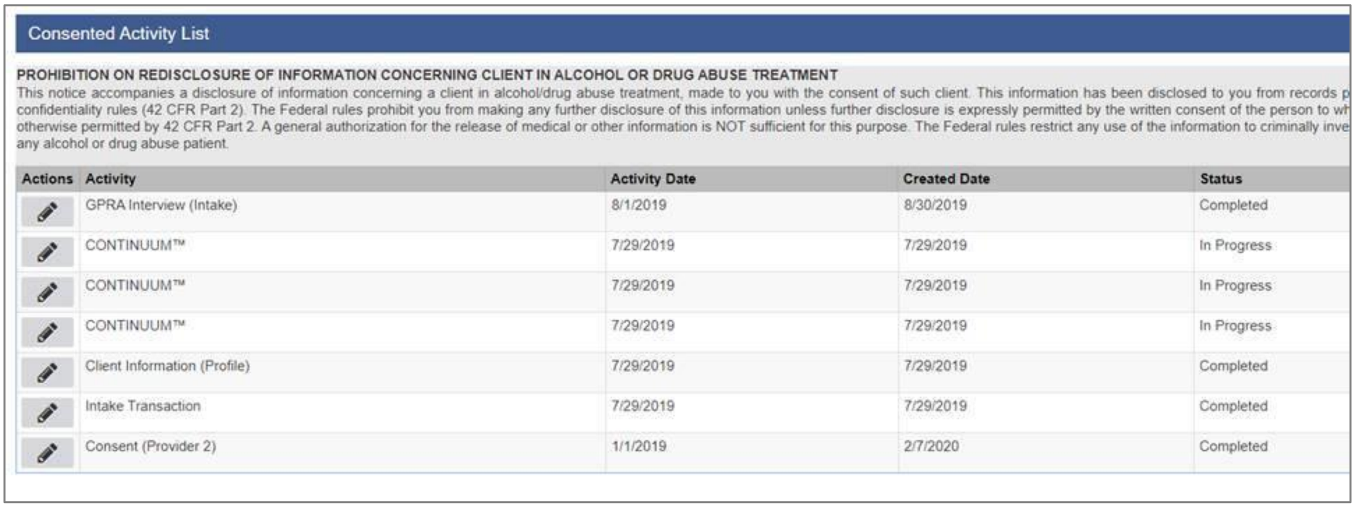


Figure 7-12: Viewing the Consented Client's Activity List

15. Select any activity which appears on the Consented Activity List.

16. The read-only information will then open within a new window within your browser.

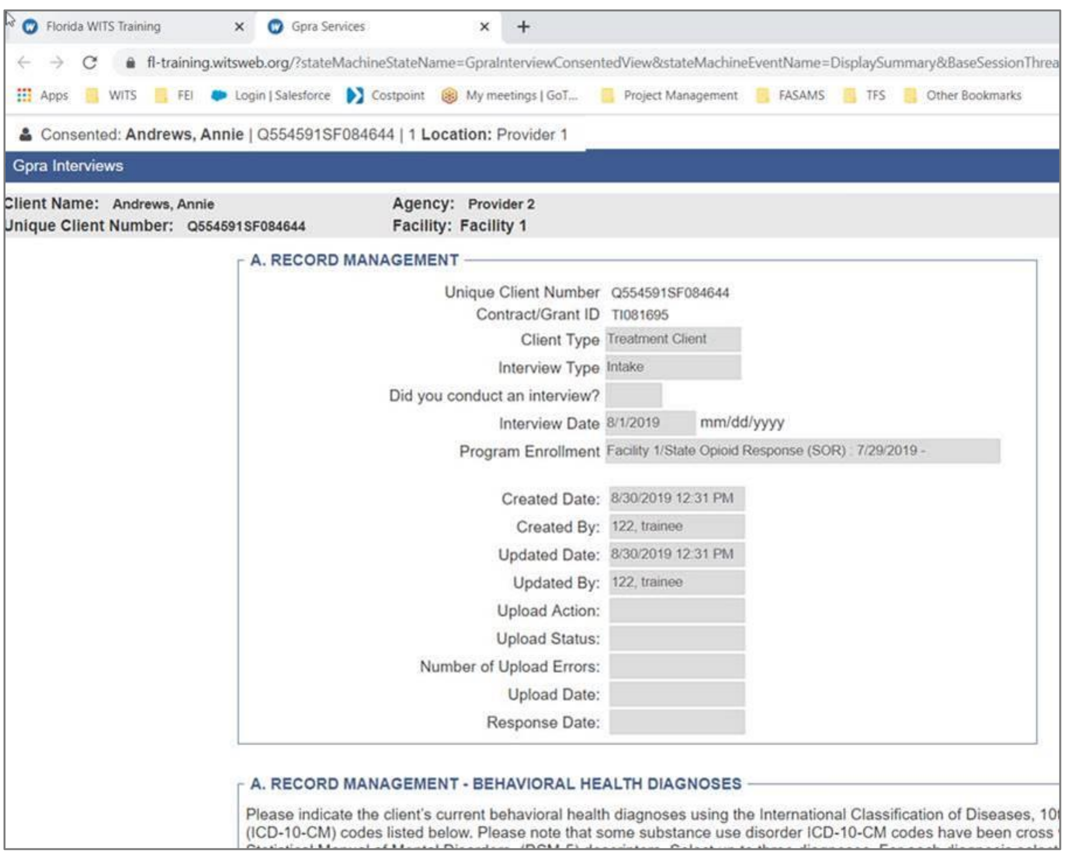


Figure 7-13: Viewing the Specific Activity

Viewing Consented Information After a Referral is Accepted

Where: Client List Screen

When a Client Consent is completed from one agency to another within WITS, the specific client information contained within that Consent record will be available for the receiving agency to view as read-only. If the client was also referred and the referral was accepted by the receiving agency, then the consented information is still available for that client. It will be available using a menu option called "Linked Consents" which is tied directly to the client record in that agency.

Role Needed:

- View Consented Clients

Note: Once the receiving agency accepts the Referral, the consented information no longer appears within the Clients with Consents from Outsides Agencies list. The consented information can be located directly within the Client Record – Linked Consents.

1. While in a specific client's record within WITS, you may view the Linked Consents by clicking "Linked Consents" on the navigation menu or within the hover action items from the Client List.

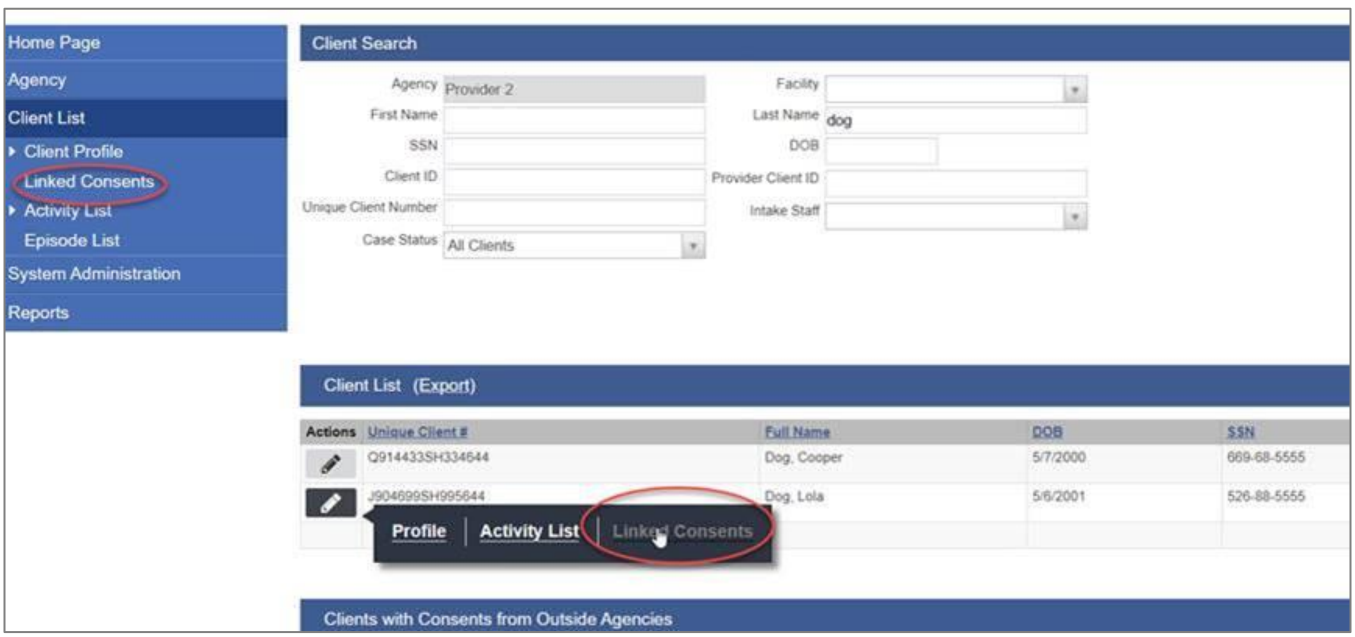


Figure 7-14: Client List Screen

2. Select the Linked Consent you wish to view. One client may have consented information coming from multiple agencies, and all will be visible within this list.

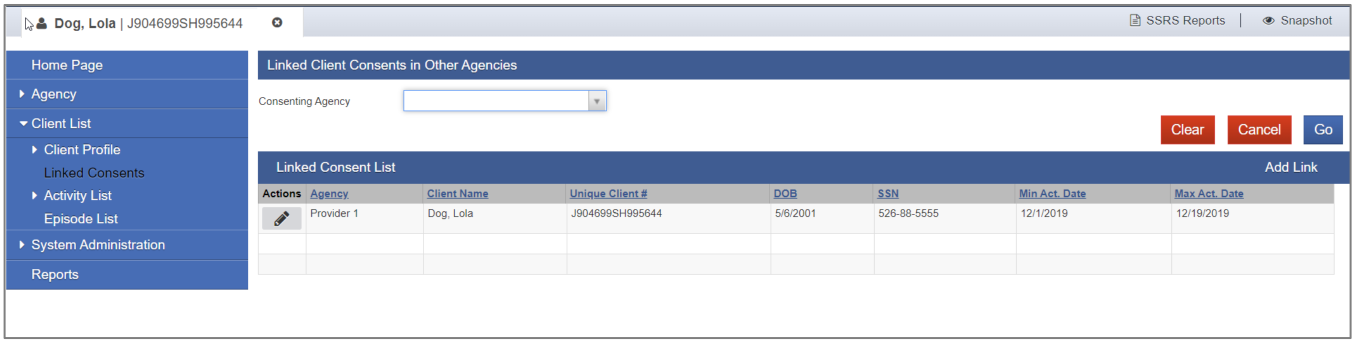


Figure 7-15: Linked Consent List Screen

3. Once the Linked Consent is selected, the following Consented Activity List will appear.

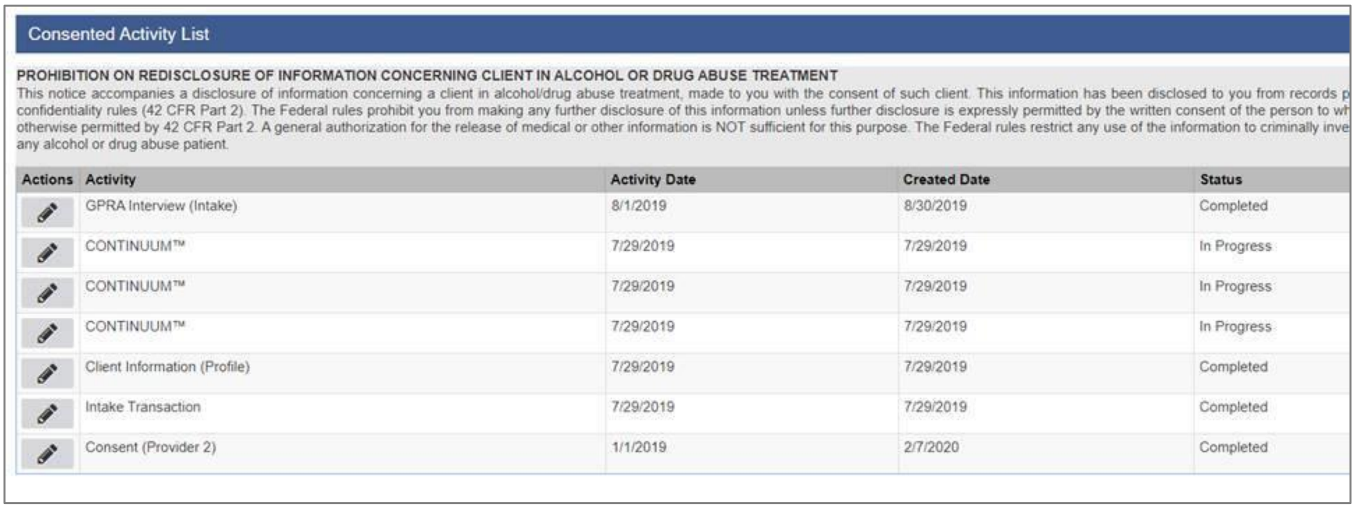


Figure 7-16: Consented Activity List

Removed Consents

Where:* Agency > Agency List > *Removed Consents

This screen displays clients with consents that have been removed. This is typically done if a client is no longer in treatment at your agency. To help easily manage the number of clients with consents from outside agencies on the Client List screen, users with the Clinical Supervisor role can “remove” consented clients from the list.

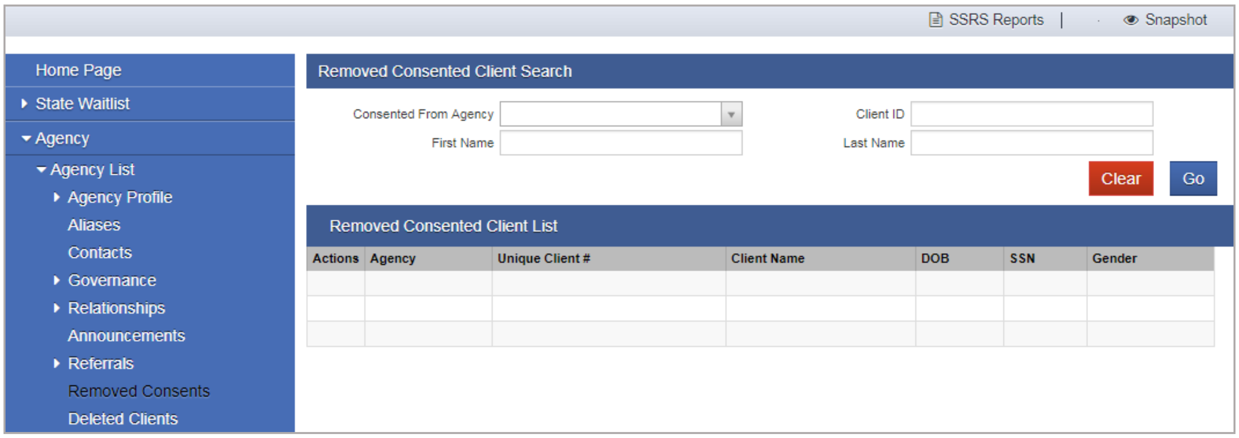


Figure 7-17: Removed Consents screen

Part 8: Encounters

Create Encounter Notes

***Where:* Client List > Activity List > Encounters**

1. On the left menu, click **Client List** and search for a client.
2. Hover over the Actions column, and click **Activity List**.
3. On the left menu, click **Encounters**. This will display the Encounter Search/List screen.
4. To view previous encounters, complete the search fields and click **Go**.
5. To create a new encounter, click **Add Encounter**.

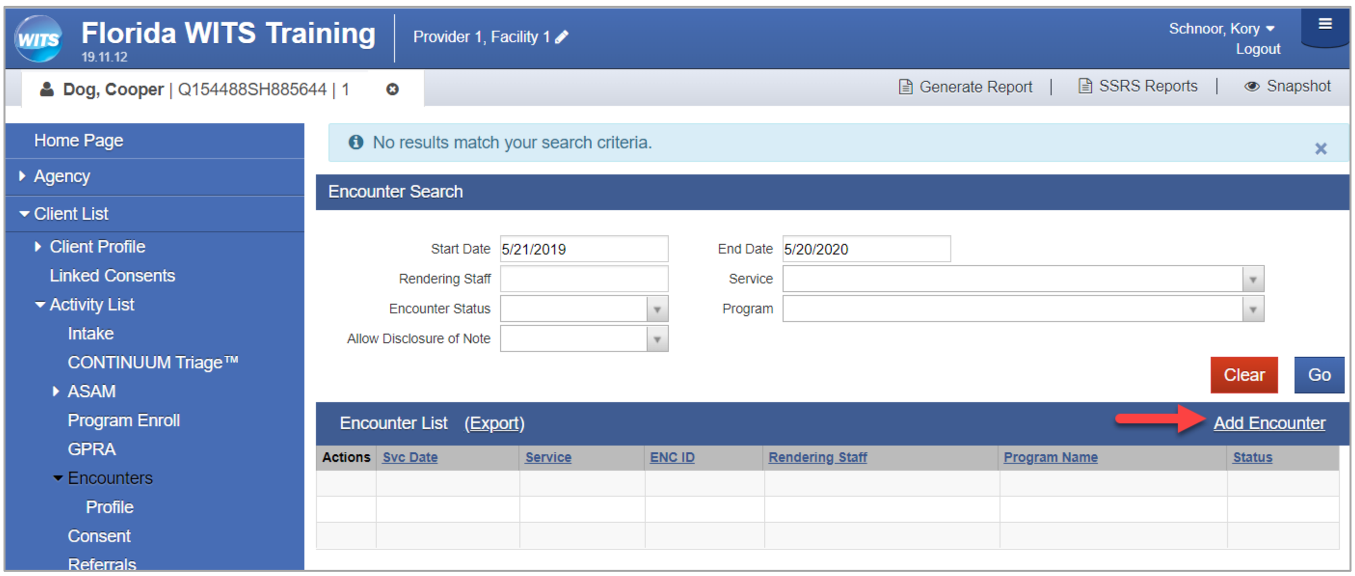


Figure 8-2: Encounter screen, Add Encounter

6. Complete the fields on the Encounter Profile screen. See table below for information on each field.

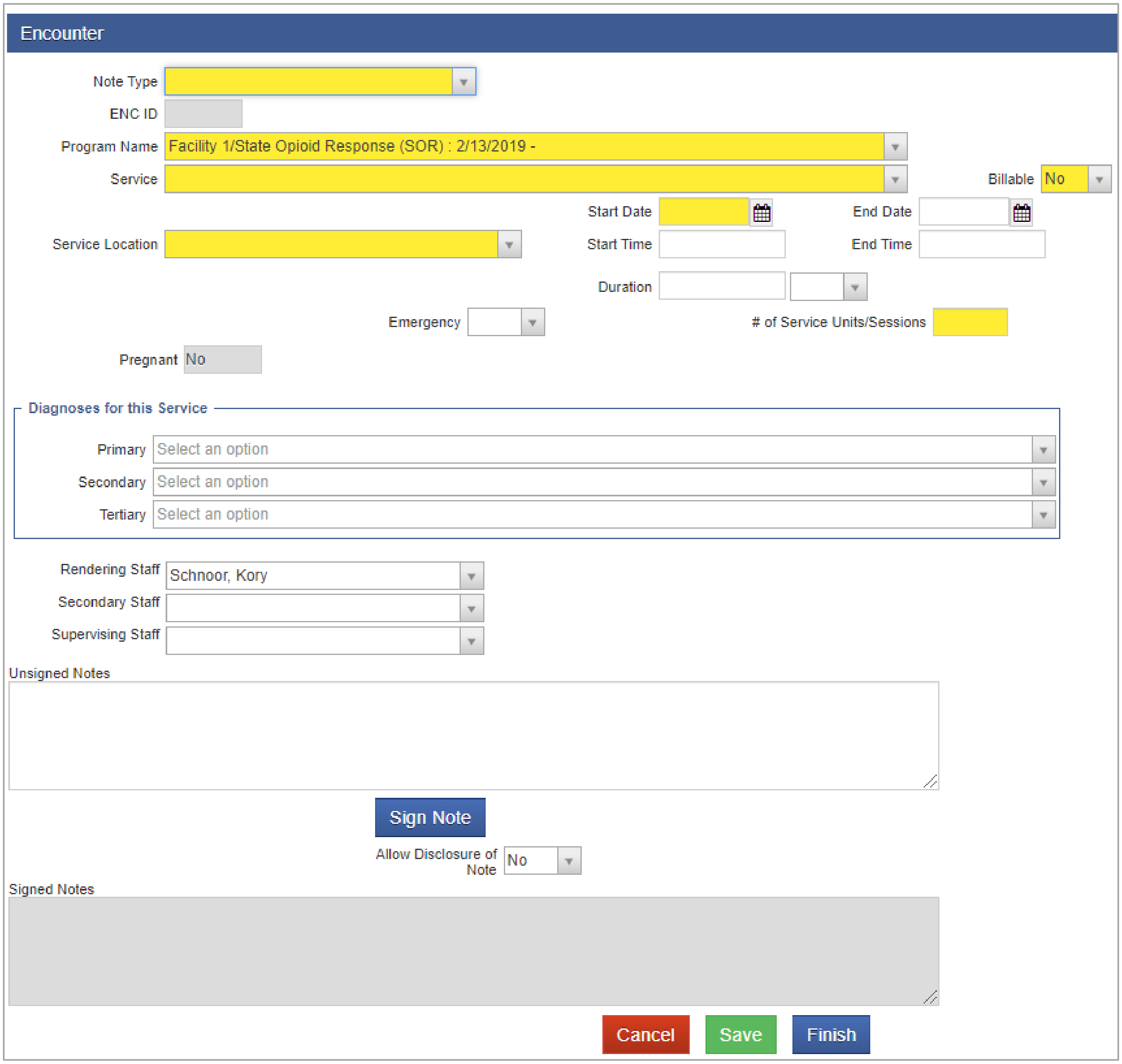
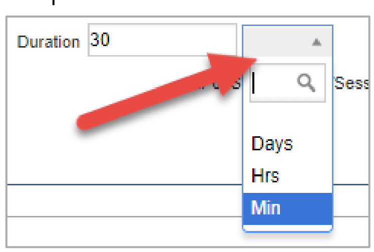


Figure 8-1: 1.Encounter Note

Table 8-1: Encounter Profile fields

Field	Description
Note Type	Select from the drop-down field.
ENC ID	Read-only field. When the encounter is saved, this field will display its unique ID number.
Created Date	Read-only field. This field will display the date and time when the encounter is saved.
Program Name	This field will pre-populate with the client's current program enrollment name and program enrollment start date. 
Service	Select a service from the drop-down list.
Billable	This field will prepopulate with No. No billing is done within FL WITS, so leave as No.
Service Location	Select an option from the drop-down list. This field may be pre-populated if this information was added to the facility profile.
Start Date	Enter the date when this service was rendered. **Note**: The start date for this encounter must occur within the same program enrollment period. Encounter date cannot be before the intake date.
Start Time	Enter the time when this service was rendered. This field may be optional or required depending on the selected service. Some services may be set up to require this information.
End Date	Enter the date when this service ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information. **Note**: The end date for this encounter must occur within the same program enrollment period.
End Time	Enter the time when this encounter ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information.
Duration	In the Duration field, type an integer to record time spent for this encounter. In the Duration drop-down field, select the unit of time. **Note**: The duration field will only accept whole numbers. Decimals (e.g., 0.5) are not accepted.  These fields may be optional or required depending on the selected service. Some services may be set up to require this information.
# of Service Units/Sessions	Type an integer representing the number of units or sessions spent for this service. Your administrator may have established policy guidelines regarding how services are recorded.
Emergency	(Optional) Select from the drop-down list.
Pregnant	(Optional) Select from the drop-down list.

Field	Description
Diagnoses for this Service	
Primary	(Optional) This field will pre-populate with the client's primary diagnosis based on the encounter start date.
Secondary	(Optional) This field will pre-populate with the client's secondary diagnosis based on the encounter start date.
Tertiary	(Optional) This field will pre-populate with the client's tertiary diagnosis based on the encounter start date.
Rendering Staff	This field will pre-populate to the user logged in. To change the rendering staff, select the correct staff member from the drop-down list. Some services may be set up to require this information.
Supervising Staff	(Optional) In the drop-down list, select the Supervisor for the Rendering Staff member, if applicable. **Note**: Declaring staff members as "supervisors" is a feature controlled through the staff member's profile by adding relationships.
Unsigned Notes / Signed Notes	This field allows the user to capture any notes about the Encounter and service delivered. Users may type notes into the Unsigned Notes box, click "Sign Note" to save the content. The Signed Notes field will save the content along with the user's information and date/time.

7. Click **Save** and/or **Finish** when done.

Part 9: Reports

Where: Reports

The Reports module includes a list of available reports, with options to view the data on screen, or export the data in to an Excel spreadsheet.

Required Role(s):

- Reports Access

To view the list of reports available in the Report Catalog, follow the steps below.

1. On the left menu, click **Reports**. This will display the Report Catalog screen.
2. Locate the desired report and click the report's name. In most cases, this will open a search criteria screen.

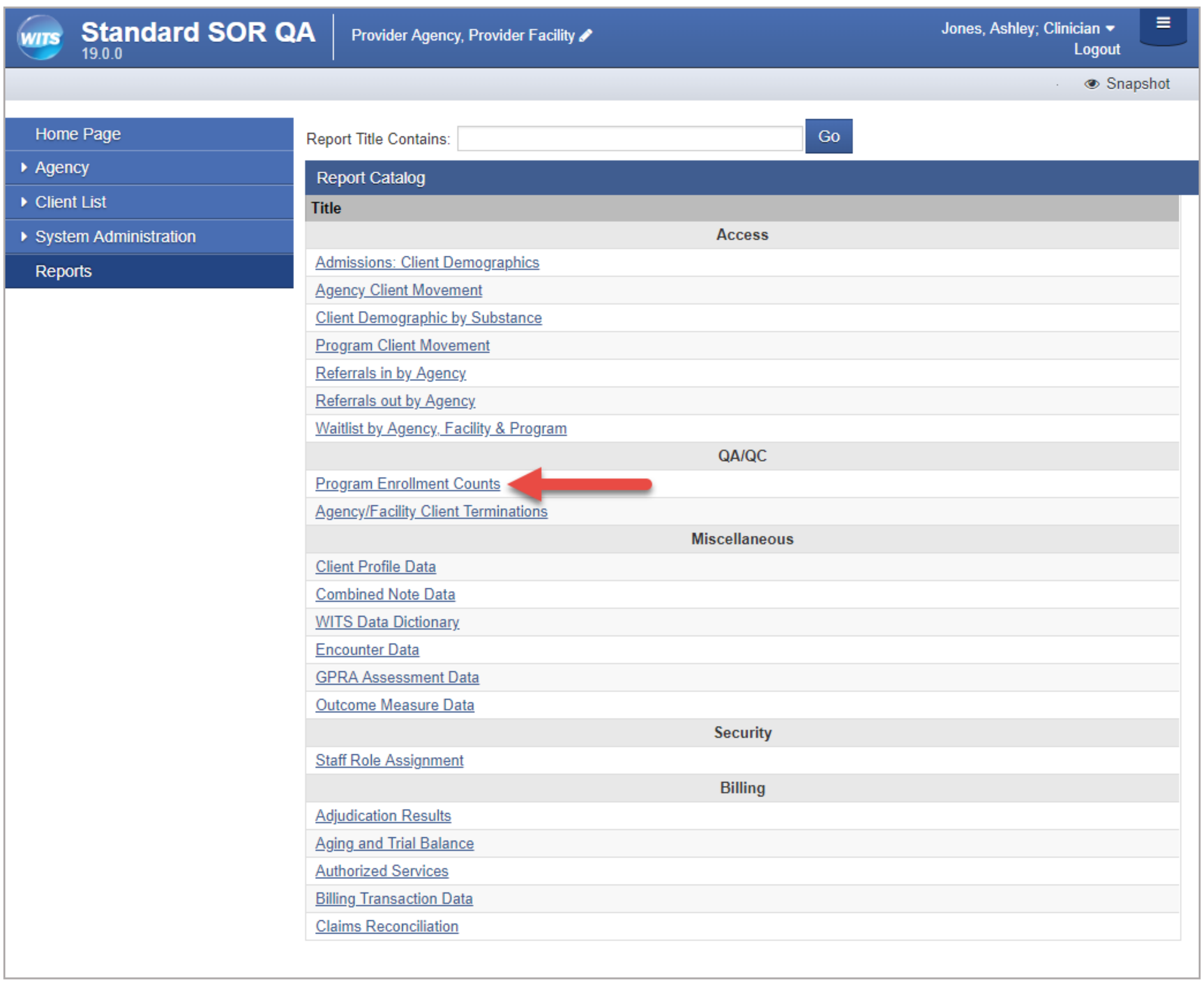
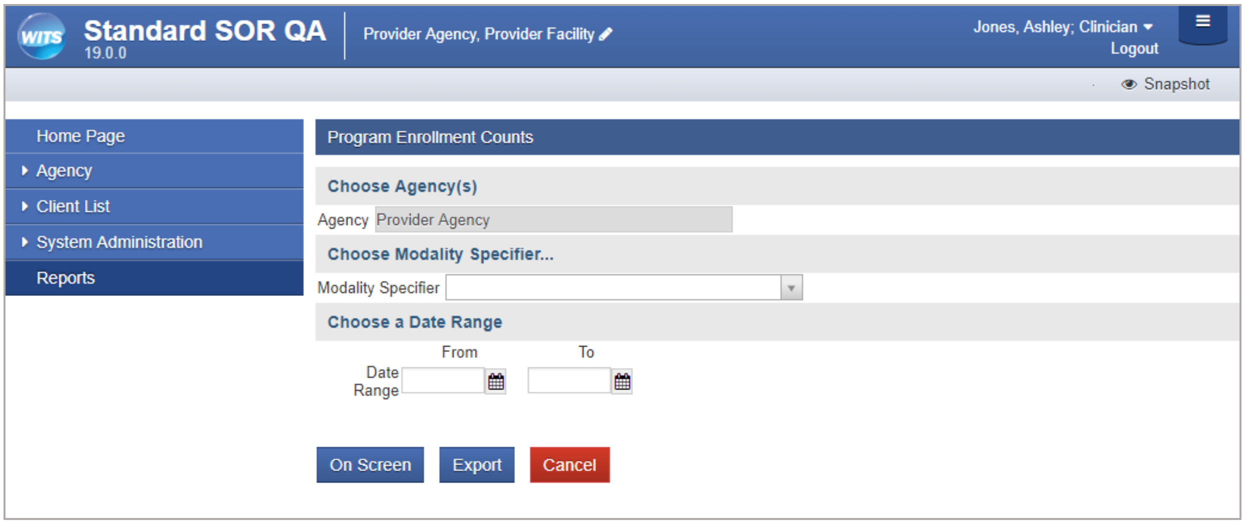


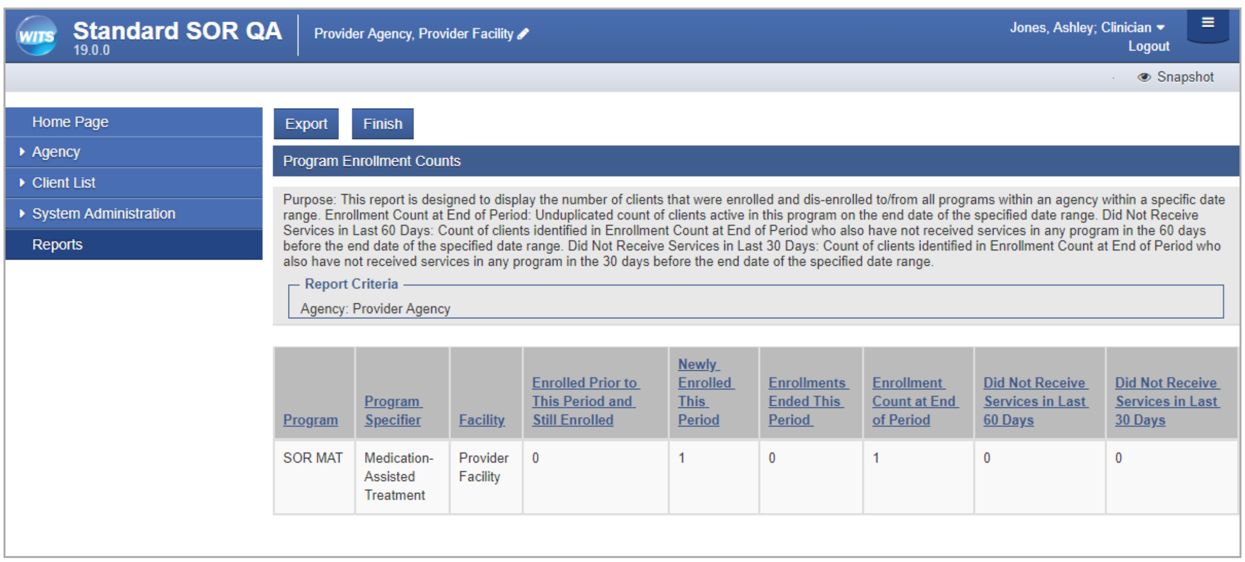
Figure 9-1: Report Catalog screen

The search criteria screen will include various fields (based on the specific report selected) to help narrow down your search results. Once any search criteria have been selected, click **On Screen**, or **Export**.

The **On Screen** button will display the search results on the screen.

The **Export** function will show more information than the On Screen result. Clicking **Export** will download an Excel file containing the report data.





3. After viewing the results on screen, or from an exported file, click **Finish**.

Part 10: ASAM Assessments

Where: Client List > Activity List

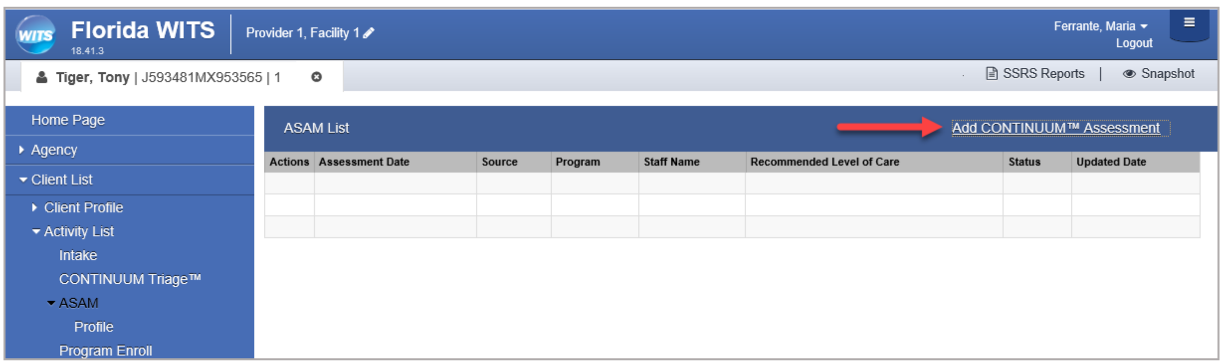
ASAM CONTINUUM™ Assessment

Required Role(s):

- CONTINUUM™ User

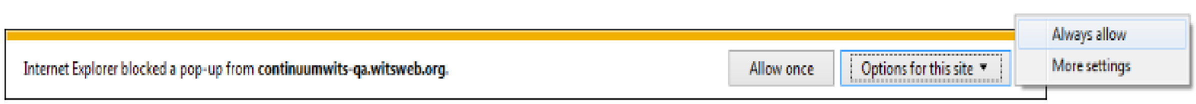
To view complete an ASAM CONTINUUM Assessment, follow the steps below.

1. Ensure you are in the context of the client with whom you are conducting the ASAM CONTINUUM Assessment. Their client number should appear on the screen. From the ASAM List screen, to begin administering an ASAM CONTINUUM™ Comprehensive assessment click **Add CONTINUUM™ Assessment.**



Note: When a user clicks on Add CONTINUUM™ Assessment link, they will be taken into the CONTINUUM platform through a new tab, which open in their browser.

Users may need to allow pop ups from this site in order for a new tab to open in their browser to perform the CONTINUUM™ Assessment. An example of a message you may see is below. See Appendix B for further instructions. Please always allow pop up's.



The very first time a clinician clicks on the Add CONTINUUM™ Assessment link, you will be asked to review and agree to an end user license agreement. Below is an example of that screen. Scroll down to the bottom of the screen and click on "I Agree".

The very first time a clinician clicks on the **Add CONTINUUM™ Assessment** link, a new tab will open in your browser and you will be asked to review and agree to an end user license agreement. Below is an example of that screen. Scroll down to the bottom of the screen and click on "**I Agree**".

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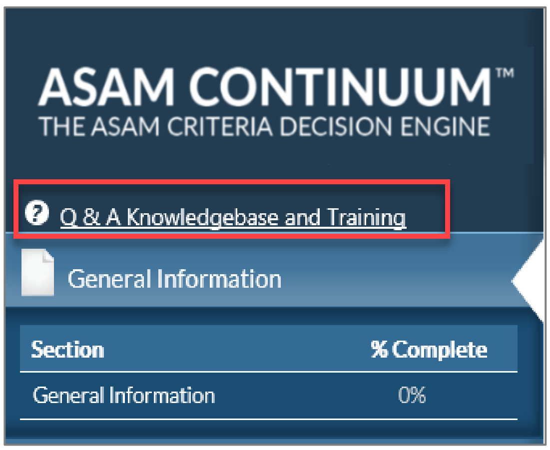
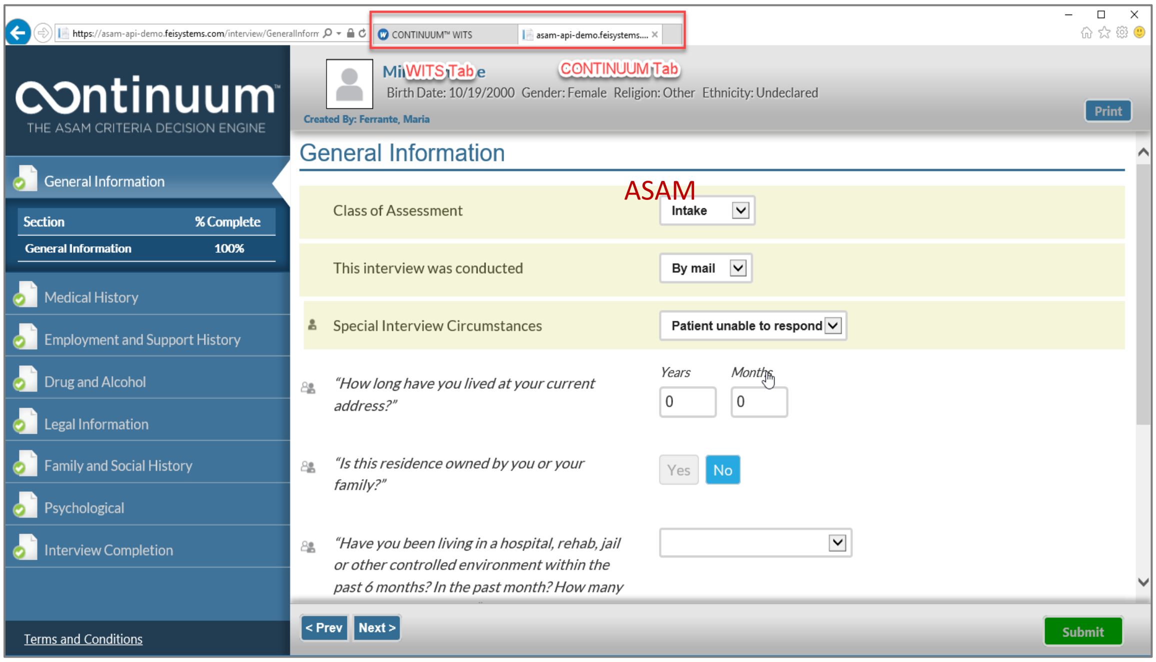
Users will also be asked to review all ASAM training materials and user guides located here on ASAM CONTINUUM's Knowledge Base web page.

- Once the user clicks the **I have reviewed all ASAM CONTINUUM™ Training Materials** option, they will no longer see this message but can always access these resources from within the assessment by clicking the Q&A Knowledge Base and Training link located in the left hand navigation panel.
- If a user clicks the I will review the ASAM CONTINUUM™ Training materials at a later time option this screen will continue to appear until the I have reviewed all ASAM CONTINUUM™ Training Materials option is clicked.

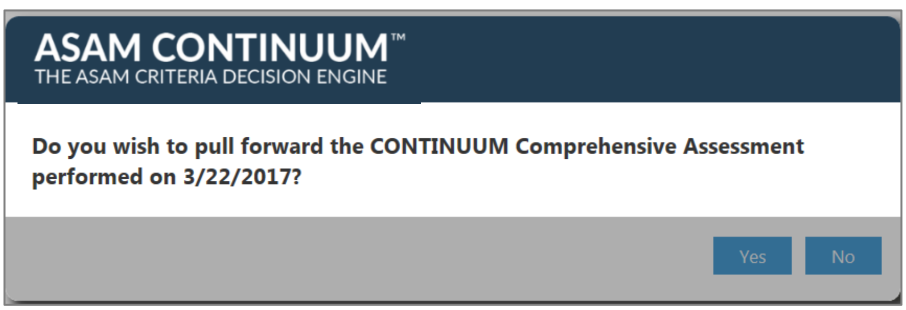


2. A new tab will open in your browser displaying the CONTINUUM™ Comprehensive assessment.

   <u>Note</u>: If you are performing a re-assessment on a client, you will receive a popup window asking if you would like to copy forward the last assessment performed on XX date. If you Click **Yes**- all of the information will be pulled forward into your new assessment and the new assessment will be editable.



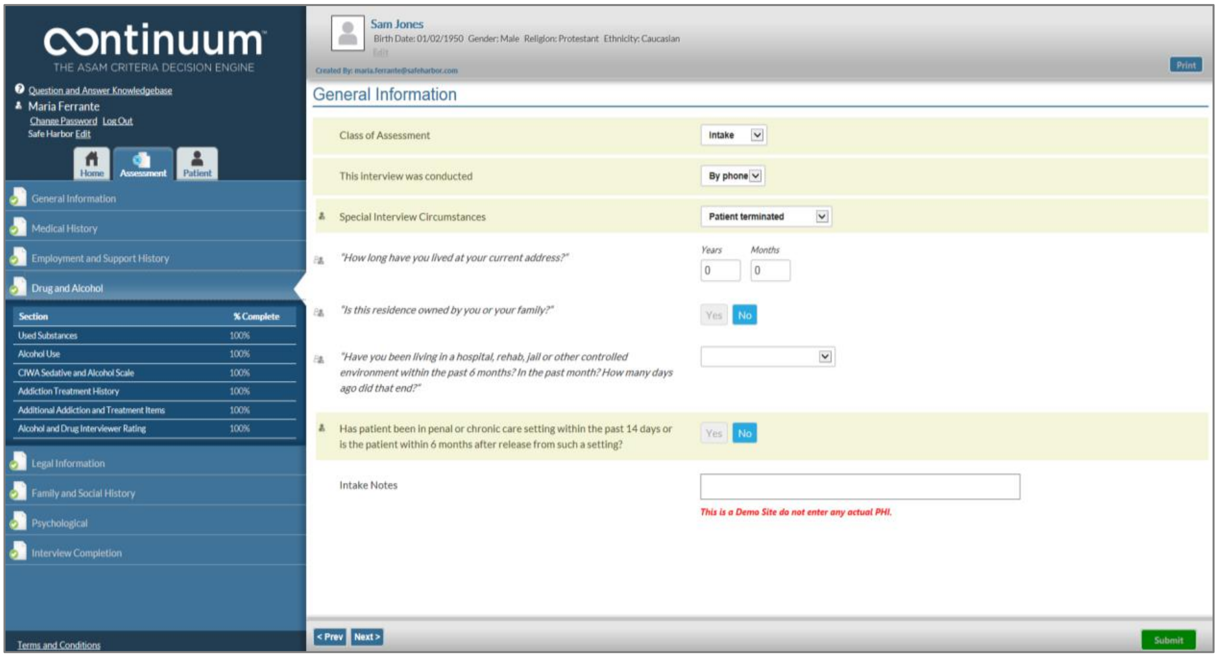
3. Click **No** – You will be taken into a new blank assessment



If you performed a CO-Triage screener for this client in the **same agency** you will receive a popup window asking if you would like to copy forward the last CO-Triage Screener performed on XX date and have its corresponding questions and answers pre-populate the CONTINUUM assessment. Click **Yes** or **No**.

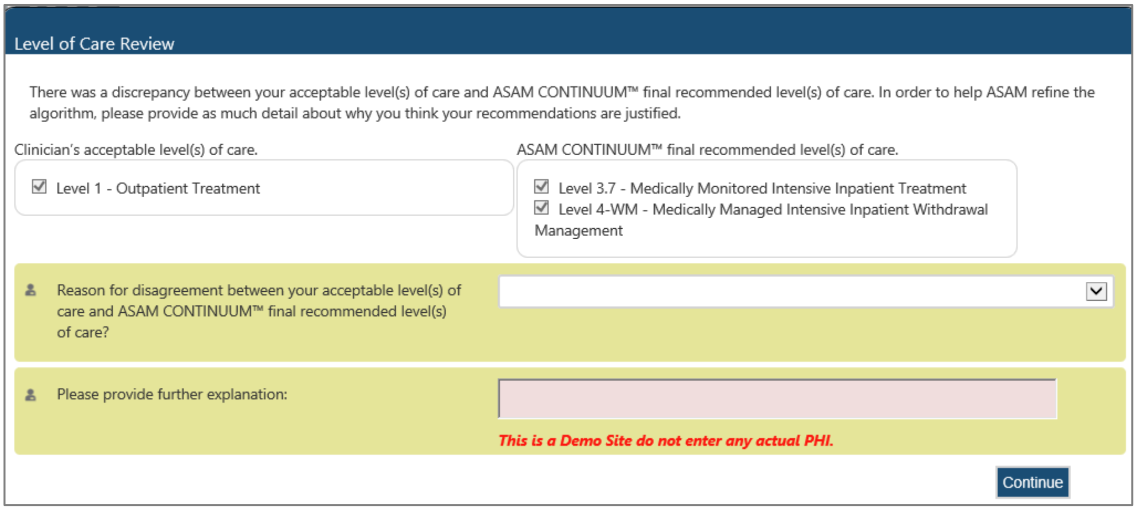
4. Administer the assessment to the client.

- As you enter data a **Save** button will appear. It is best practice to save information that has been entered throughout the course of the assessment at the end of each screen.
- Use the **Previous** and **Next** buttons to move from screen to screen or click on the desired section and subsection in the navigation window.
- Once all sections are 100% Complete, the green **Submit** button will appear. Click the **Submit** button.

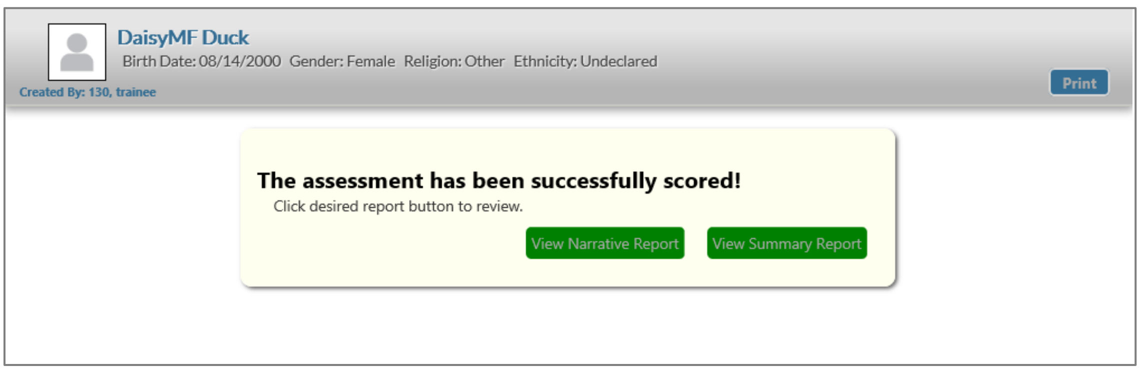


NOTE: After clicking the green **Submit** button, but before receiving the ASAM Summary and Narrative Reports, the Level of Care Review screen will appear if the clinician recommended level of care and CONTINUUM recommended final levels of care differ.

- This screen gives the user the ability to provide feedback on the CONTINUUM recommended final levels of care and the clinician recommended level of care.
- Feedback provided will be considered by the ASAM architects for future adjustments.
- Please complete all yellow required questions and click the **Continue** button.

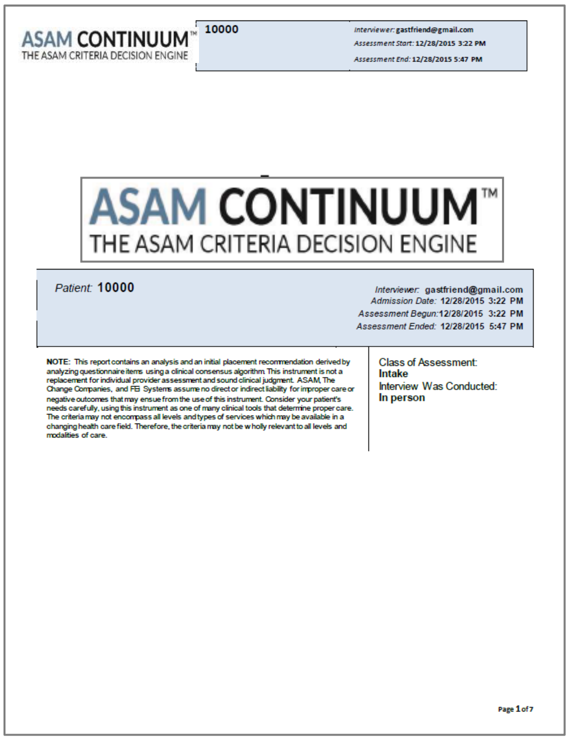


5. The following screen will appear indicating that the assessment has been successfully scored.
6. To review the report for this client click **View Narrative Report or View Summary Report**.



7. Clicking on either **Report** button will cause the following dialog box to open at the bottom of your screen, where you can view the report. Optionally, you can save to your desktop. Will also have the ability to view the report in WITS.

8. The exhibit below shows an example of the Summary ASAM CONTINUUM report. The last or second to last page contains the ASAM Criteria final Level of Care recommendations for your client.



ASAM CONTINUUM™
THE ASAM CRITERIA DECISION ENGINE

10000
Interviewer: gastfriend@gmail.com
Assessment Start: 12/28/2015 3:22 PM
Assessment End: 12/28/2015 5:47 PM

ASAM CONTINUUM™
THE ASAM CRITERIA DECISION ENGINE

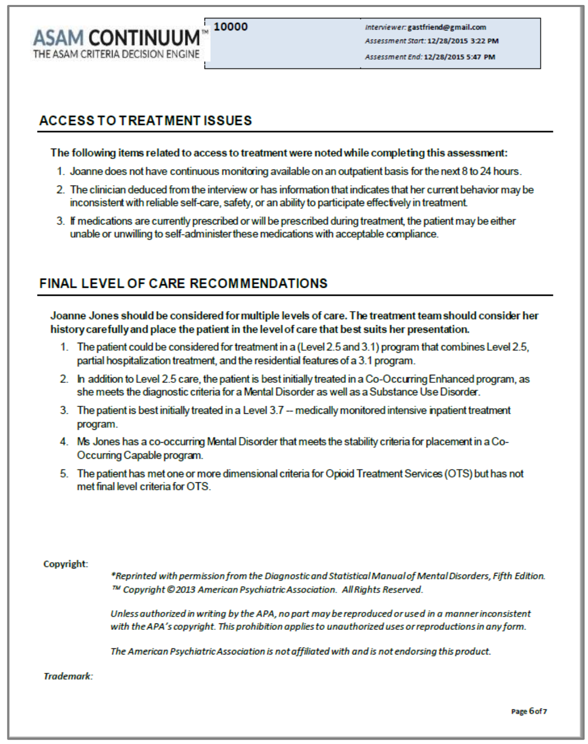
Patient: **10000**

Interviewer: gastfriend@gmail.com
Admission Date: 12/28/2015 3:22 PM
Assessment Begun: 12/28/2015 3:22 PM
Assessment Ended: 12/28/2015 5:47 PM

NOTE: This report contains an analysis and an initial placement recommendation derived by analyzing questionnaire items using a clinical consensus algorithm. This instrument is not a replacement for individual provider assessment and sound clinical judgment. ASAM, The Change Companies, and FEI Systems assume no direct or indirect liability for improper care or negative outcomes that may ensue from the use of this instrument. Consider your patient's needs carefully, using this instrument as one of many clinical tools that determine proper care. The criteria may not encompass all levels and types of services which may be available in a changing health care field. Therefore, the criteria may not be wholly relevant to all levels and modalities of care.

Class of Assessment:
Intake
Interview Was Conducted:
In person

Page 1 of 7



ASAM CONTINUUM™
THE ASAM CRITERIA DECISION ENGINE

10000
Interviewer: gastfriend@gmail.com
Assessment Start: 12/28/2015 3:22 PM
Assessment End: 12/28/2015 5:47 PM

ACCESS TO TREATMENT ISSUES

The following items related to access to treatment were noted while completing this assessment:

1. Joanne does not have continuous monitoring available on an outpatient basis for the next 8 to 24 hours.
2. The clinician deduced from the interview or has information that indicates that her current behavior may be inconsistent with reliable self-care, safety, or an ability to participate effectively in treatment.
3. If medications are currently prescribed or will be prescribed during treatment, the patient may be either unable or unwilling to self-administer these medications with acceptable compliance.

FINAL LEVEL OF CARE RECOMMENDATIONS

Joanne Jones should be considered for multiple levels of care. The treatment team should consider her history carefully and place the patient in the level of care that best suits her presentation.

1. The patient could be considered for treatment in a (Level 2.5 and 3.1) program that combines Level 2.5, partial hospitalization treatment, and the residential features of a 3.1 program.
2. In addition to Level 2.5 care, the patient is best initially treated in a Co-Occurring Enhanced program, as she meets the diagnostic criteria for a Mental Disorder as well as a Substance Use Disorder.
3. The patient is best initially treated in a Level 3.7 -- medically monitored intensive inpatient treatment program.
4. Ms Jones has a co-occurring Mental Disorder that meets the stability criteria for placement in a Co-Occurring Capable program.
5. The patient has met one or more dimensional criteria for Opioid Treatment Services (OTS) but has not met final level criteria for OTS.

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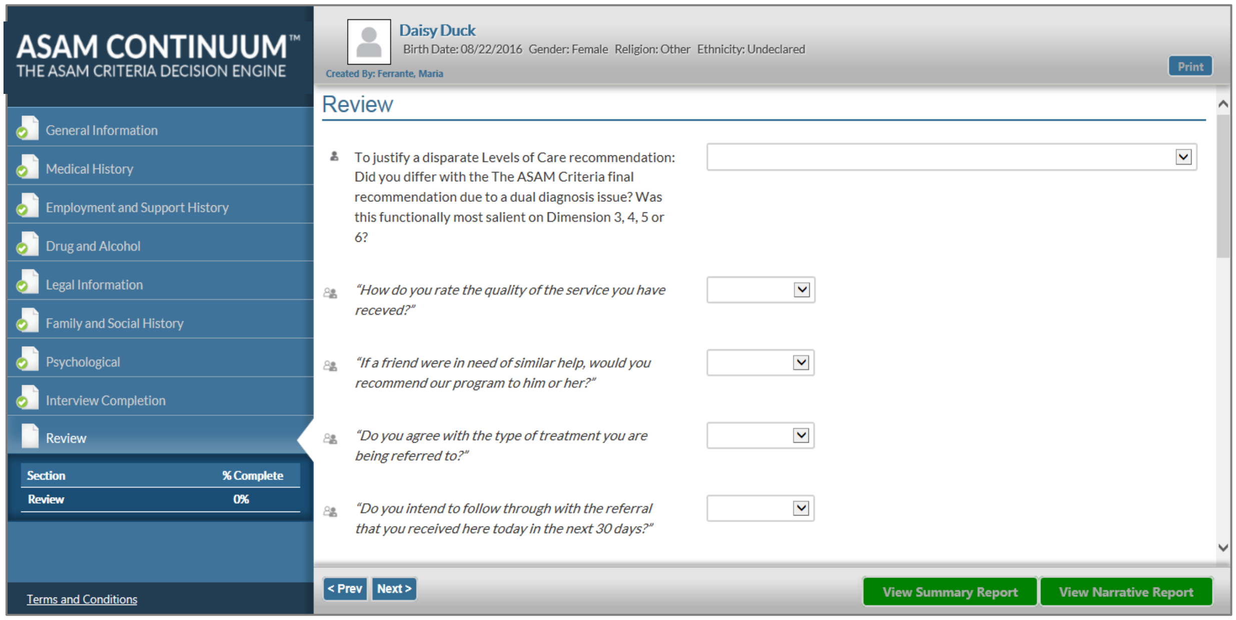
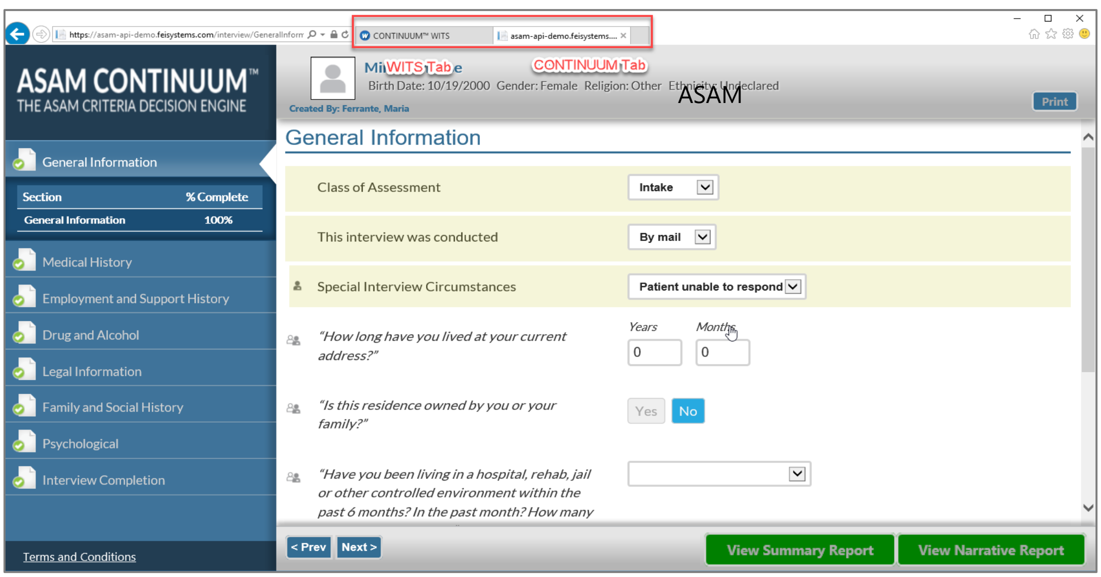
Page 6 of 7

9. Next, complete the optional CONTINUUM™ Review section by returning to the CONTINUUM navigation menu and click on **Review**.

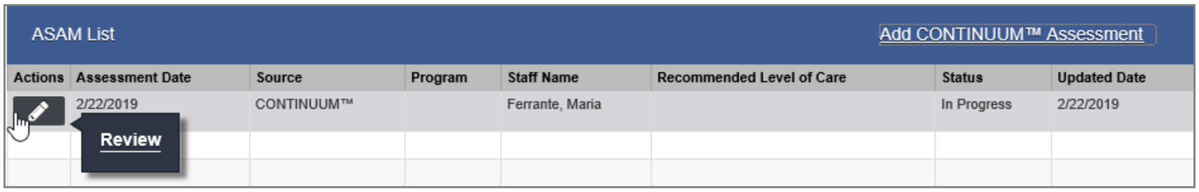


10. Return to CONTINUUM WITS by clicking on the CONTINUUM WITS tab in your browser.



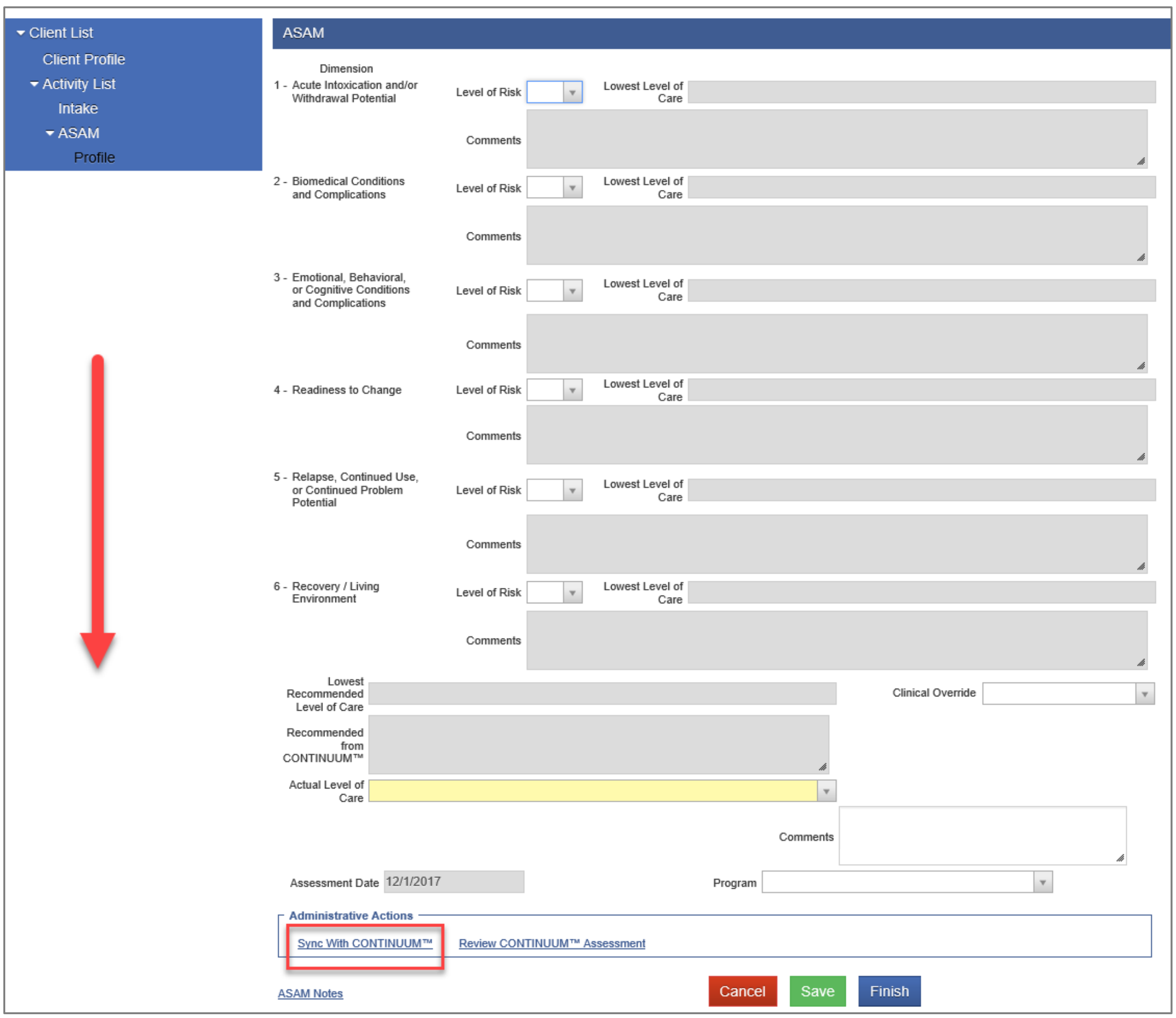
Actual Level of Care Placement in CONTINUUM WITS

1. From the ASAM List screen, hover over the pencil icon of the assessment that you just created in CONTINUUM™ and click on **Review**.



2. You are now taken to the CONTINUUM WITS ASAM Profile screen.

3. To pull the recommended level of care for each dimension and the final recommended level of care from the CONTINUUM™ assessment performed, under Administrative Actions at the bottom of the screen, click **Sync with CONTINUUM™.**



4. The recommended level of care for each dimension and the final recommended level of care from the CONTINUUM™ Assessment are now pre-populated into WITS.

5. On the ASAM Screen:
   - Enter the Actual Level of Care the client has been placed in, if different than the Recommended Level of Care.
   - Enter a Clinical Override Reason if the actual level of care is different from the recommended level of care.
   - Enter comments in the Comment Box

6. Upon completion under **Administrative Actions** you have the option to click **Sign ASAM**. The record is now un-editable and it is now time and date steamed by the user who signed the record.
7. Under **Administrative Actions** regardless of whether or not the record is signed users can always:
   - Review the CONTINUUM™ Assessment performed on this patient
   - Review the CONTINUUM™ Report generated for this assessment
8. Click **Save,** or **Finish** to save and return to the list screen.

ASAM CO-Triage™ Screening and Referral

Required Role(s):

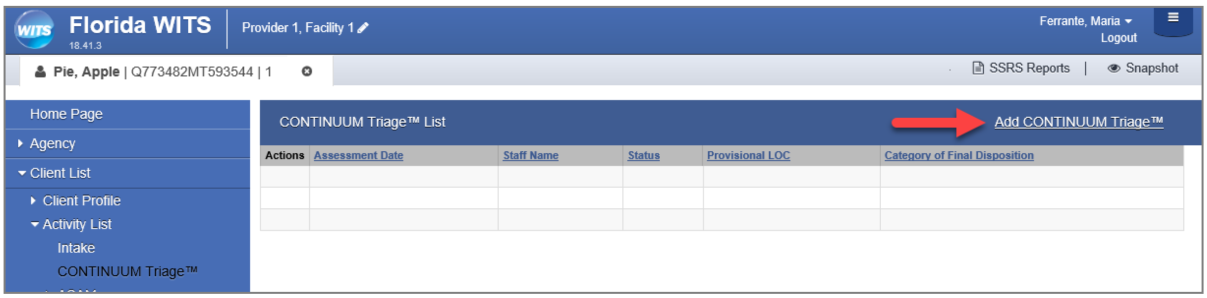
- CONTINUUM Triage ™ Access

To view complete an ASAM CONTINUUM Triage ™ (CO-Triage) Assessment, follow the steps below.

1. From the Activity List screen, click the **CONTINUUM™ CO-Triage** ™ menu item from the left hand navigation panel.

2. Ensure you are in the context of the client with whom you are conducting the ASAM CONTINUUM Assessment. Their client number should appear on the screen.

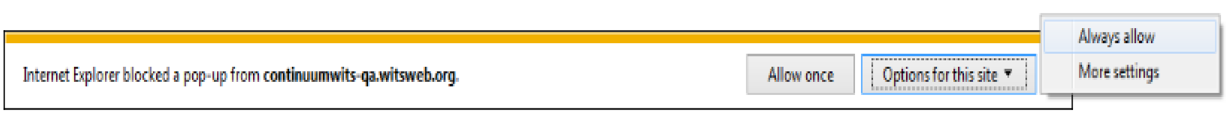
3. To begin administering an ASAM CO-Triage ™ Screener click **Add CONTINUUM Triage ™** on your CONTINUUM Triage ™ List screen**.**



Note: When a user clicks on **Add CONTINUUM Triage ™** link a new tab will automatically open in your browser. You will be taken into the ASAM CONTINUUM platform.

Users may need to allow pop ups from this site in order for a new tab to open in their browser to perform the CO-Triage™. An example of a message you may see is below. Please always allow pop up's.

The very first time a clinician clicks on the **Add CONTINUUM Triage™ Assessment** link, you will be asked to review and agree to an end user license agreement. Below is an example of that screen. Scroll down to the bottom of the screen and click on "**I Agree**".



ASAM CONTINUUM™

THE ASAM CRITERIA DECISION ENGINE

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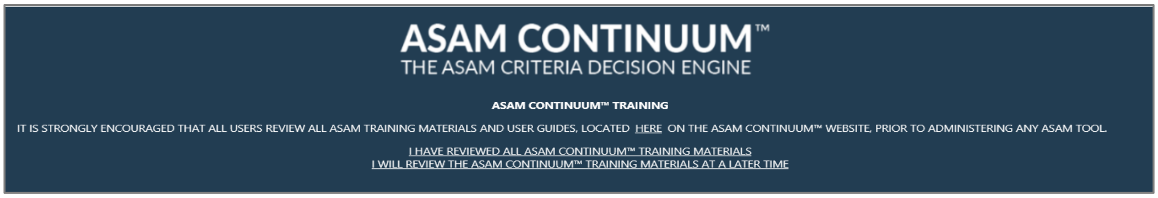
I Agree | I Do Not Agree

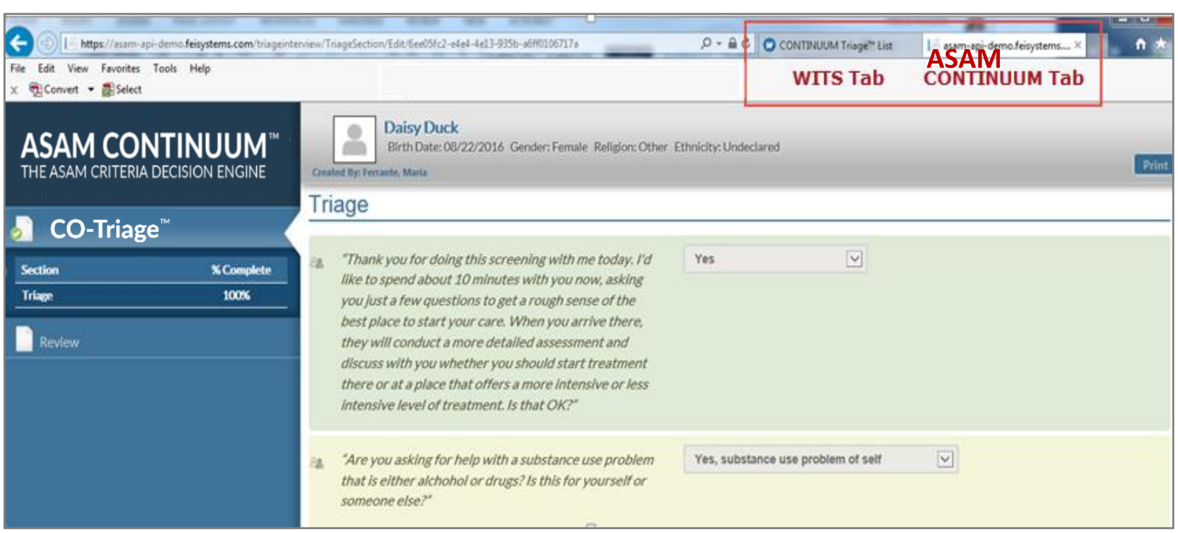
Users will also be asked to review all ASAM training materials and user guides located here on ASAM CONTINUUM's Knowledge Base web page.



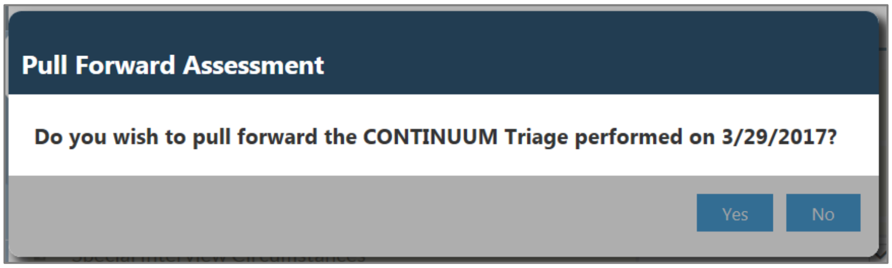
- Once the user clicks the "**I have reviewed all ASAM CONTINUUM™ Training Materials"** option, they will no longer see this message but can always access these resources from within the assessment by clicking the Q&A Knowledge Base and Training link located in the left hand navigation panel.
- If a user clicks the **I will review the ASAM CONTINUUM™ Training materials at a later tim e** option this screen will continue to appear until the **I have reviewed all ASAM CONTINUUM™ Training Materials**

option is clicked.

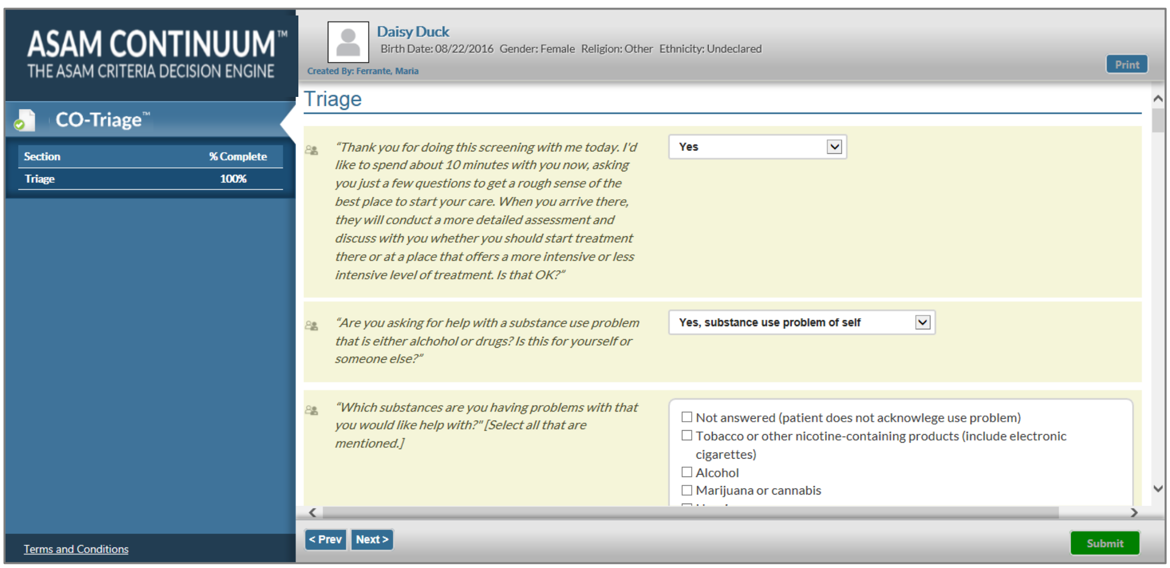
4. A new tab (with a URL starting with "asam" will open in your browser displaying the ASAM CO-Triage ™ screener.



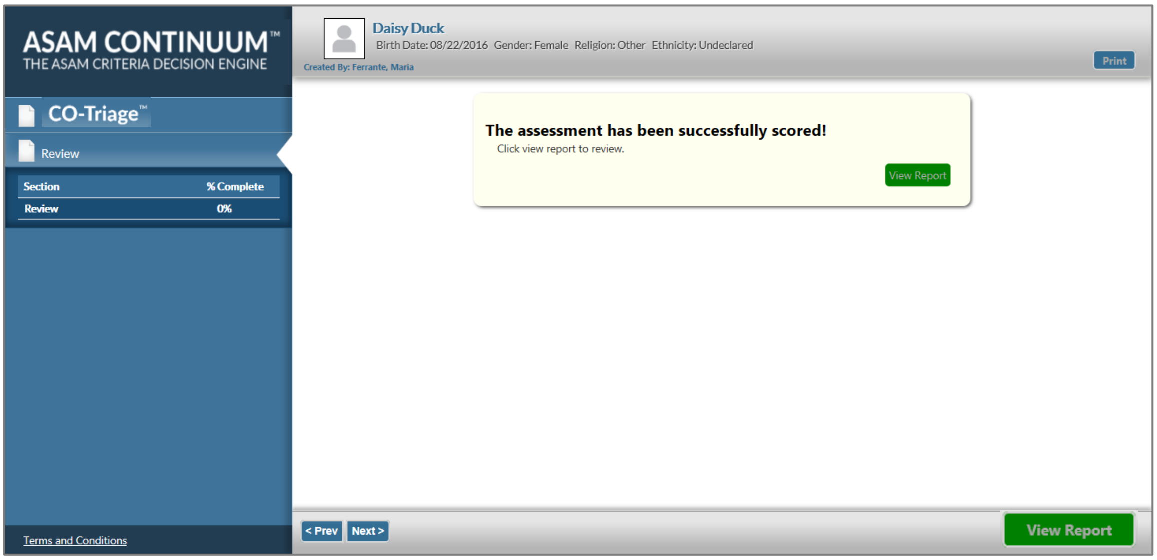
Note: If you performed an ASAM CO-Triage screener for this client you will receive a popup window asking if you would like to copy forward the last ASAM CO-Triage Screener performed on XX date and have its corresponding questions and answers pre-populate into a new ASAM CO-Triage screener. Click **Yes** or **No**.



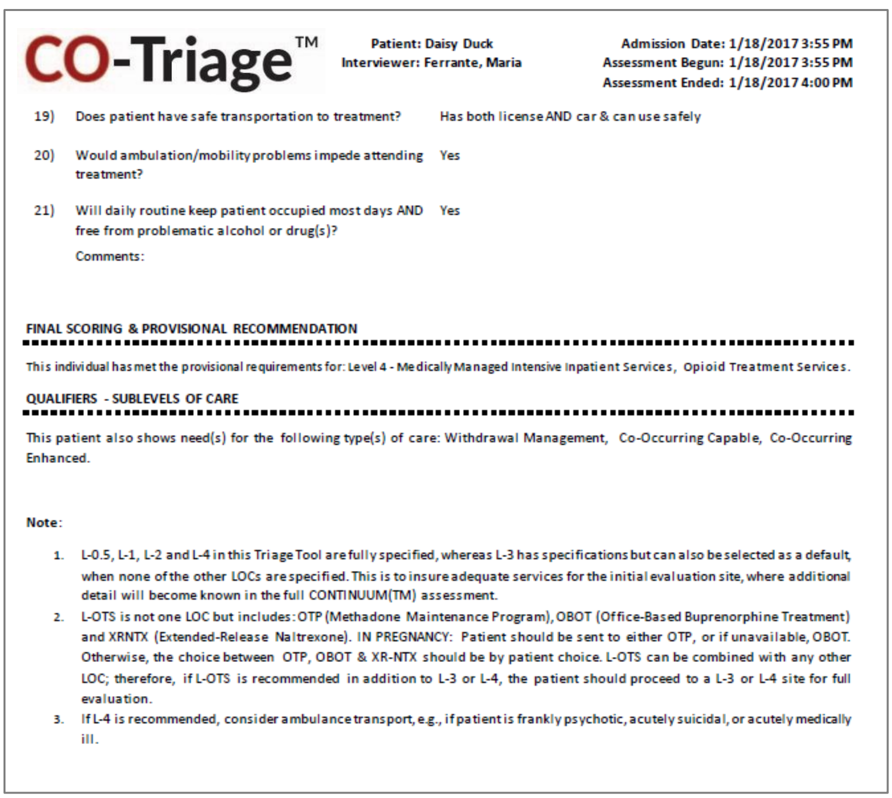
Administer the assessment to the client. As you enter answers, a blue **Save** button will appear at the bottom left hand corner of the ASAM CO-Triage ™ screen.   Clicking on **Save** allows you to save the entered data if you need to stop the CO-Triage process before all the questions are answered. Once all of the questions have been answered and the CO-Triage ™ is 100% complete, the green **Submit** button will appear at the bottom, right hand corner of the ASAM CO-Triage ™ screen. Click the **Submit** button.



5. After clicking the green **Submit** button, you receive the following screen indicating that the ASAM CO-Triage™ has been successfully scored. You can then click on the green **View Report** button to see the generated the CONTINUUM report.



6. The exhibit below is the last page of the ASAM CO-Triage ™ report, which contains the Provisional Level of Care Recommendation and the Qualifiers.



CO-Triage™

Patient: Daisy Duck
Interviewer: Ferrante, Maria

Admission Date: 1/18/2017 3:55 PM
Assessment Begun: 1/18/2017 3:55 PM
Assessment Ended: 1/18/2017 4:00 PM

19)	Does patient have safe transportation to treatment?	Has both license AND car & can use safely
20)	Would ambulation/mobility problems impede attending treatment?	Yes
21)	Will daily routine keep patient occupied most days AND free from problematic alcohol or drug(s)?	Yes

Comments:

FINAL SCORING & PROVISIONAL RECOMMENDATION

This individual has met the provisional requirements for: Level 4 - Medically Managed Intensive Inpatient Services, Opioid Treatment Services.

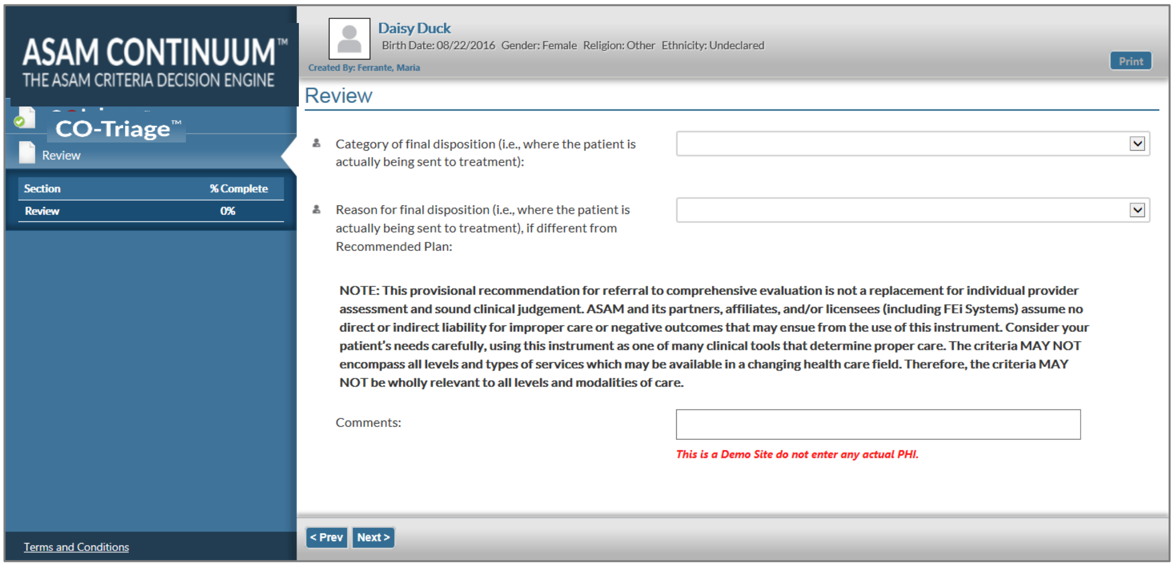
QUALIFIERS - SUBLEVELS OF CARE

This patient also shows need(s) for the following type(s) of care: Withdrawal Management, Co-Occurring Capable, Co-Occurring Enhanced.

Note:

1. L-0.5, L-1, L-2 and L-4 in this Triage Tool are fully specified, whereas L-3 has specifications but can also be selected as a default, when none of the other LOCs are specified. This is to insure adequate services for the initial evaluation site, where additional detail will become known in the full CONTINUUM(TM) assessment.
2. L-OTS is not one LOC but includes: OTP (Methadone Maintenance Program), OBOT (Office-Based Buprenorphine Treatment) and XRNTX (Extended-Release Naltrexone). IN PREGNANCY: Patient should be sent to either OTP, or if unavailable, OBOT. Otherwise, the choice between OTP, OBOT & XR-NTX should be by patient choice. L-OTS can be combined with any other LOC; therefore, if L-OTS is recommended in addition to L-3 or L-4, the patient should proceed to a L-3 or L-4 site for full evaluation.
3. If L-4 is recommended, consider ambulance transport, e.g., if patient is frankly psychotic, acutely suicidal, or acutely medically ill.

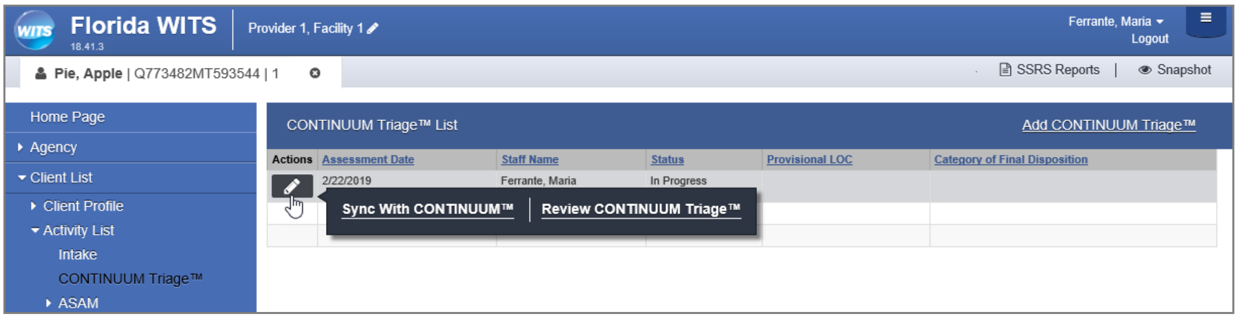
7. Next, complete the optional ASAM CONTINUUM™ CO-Triage ™ **Review** section if desired, by returning to the ASAM CO-Triage screener's navigation menu and click on **Review**. As none of the questions in this section are required the percentage complete in the navigation menu will always remain at 0%.



8. Return to WITS by clicking on the WITS tab in your browser.

Pulling Back the ASAM CO-Triage ™ Report into WITS

1. To begin, in the WITS browser tab, from the ASAM CONTINUUM Triage ™ List, hover over the pencil icon of the CO-Triage record you just created and click **Sync with CONTINUUM™**. This pulls back the **CONTINUUM Triage ™ report and data into WITS** and makes it available for support staff who cannot access CONTINUUM Triage ™ directly.



2. The ASAM CONTINUUM Triage ™ Report is now pulled back into WITS, the status is also changed to **Complete**.

3. Hover over the pencil icon again to:

- **Review CONTINUUM Triage ™** - Allows a user to review the CONTINUUM Triage ™ Screener from within ASAM CONTINUM which is in progress or has been completed.
- **View CONTINUUM Triage ™ Report** – Allows users with access to the ASAM CONTINUUM Triage ™ screen to view the report from inside WITS.

Part 11: Staff Administration

Where: Agency > Staff Members

Staff Management involves creating and managing staff member accounts within the system. This includes setting up new employees and assigning the correct system permissions through role assignments; troubleshooting login issues such as resetting passwords; and revoking system access when an individuals' employment ends.

From the Staff Member Search screen, you can use the search bar to find existing staff members by searching for their first name, last name, email address or User ID (the User ID is displayed in the column titled, "Identifier").

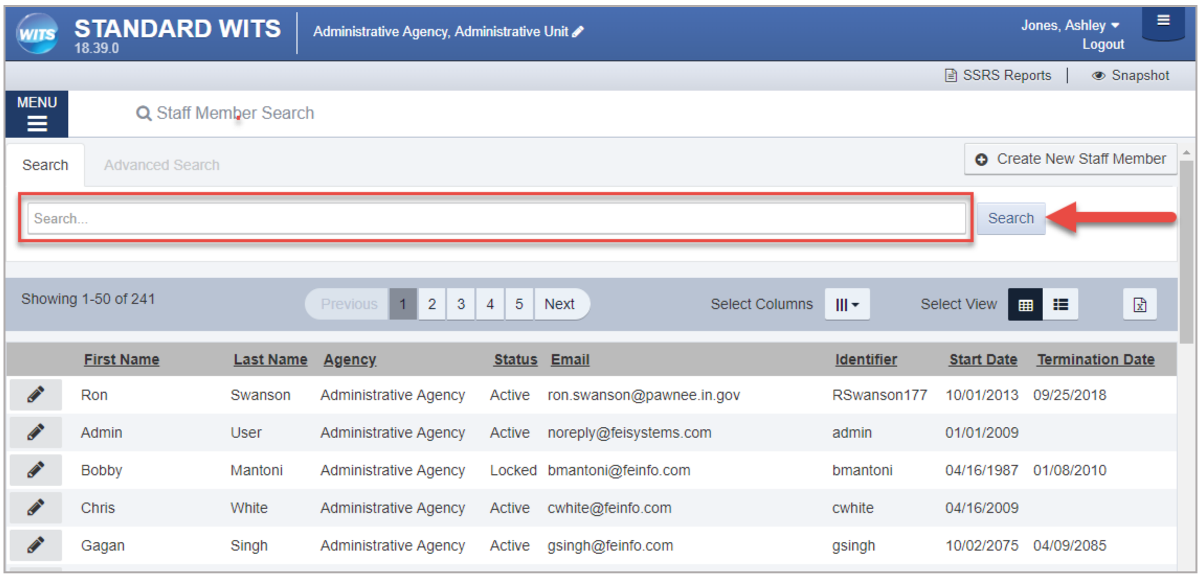
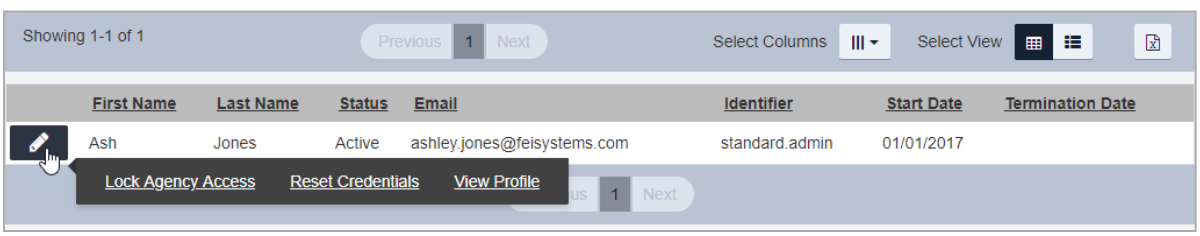
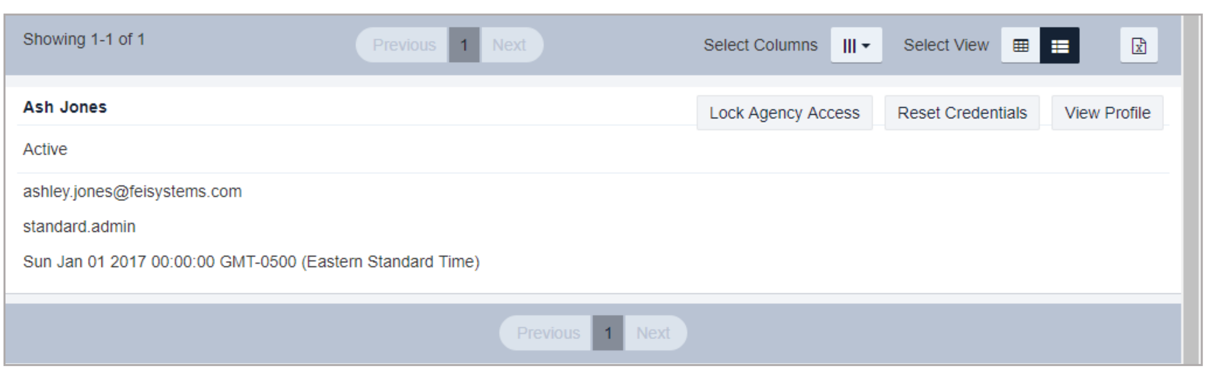


Figure 11-1: Staff Member Search/List screen

Table View



Panel View



How to Set Up a New Staff Member Account

***Where:* Agency > Staff Members**

Follow the steps below to create a new staff account.

Note: Make sure you are in the correct agency location prior to creating a staff account.

1. On the left menu, click **Agency**, and then click **Staff Members**.
2. Click **Create New Staff Member**.

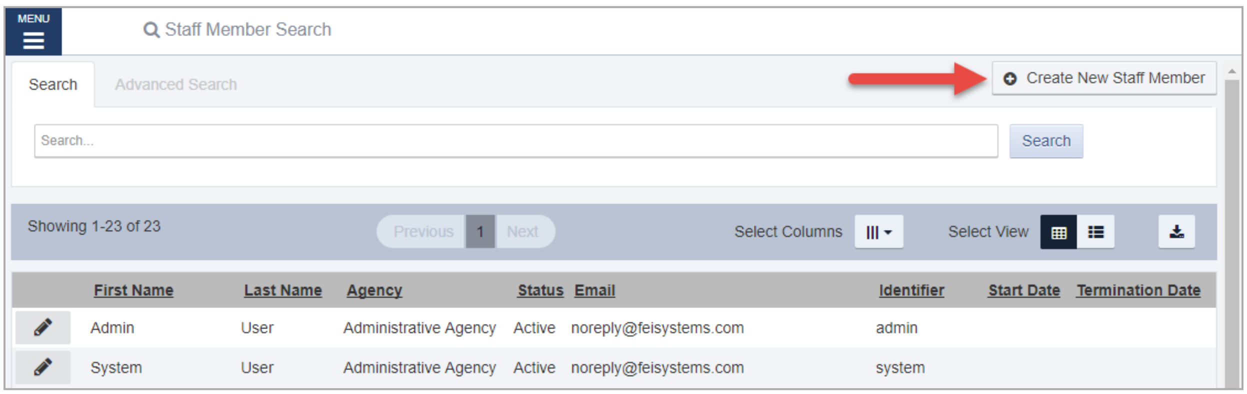


Figure 11-2: Staff Member screen

3. On the **Create New Staff Member** screen, complete at least the required fields. Required fields are indicated by a red bar to the right of the field.

Table 11-1: Create New Staff Member fields

Field	Description
Prefix	Optional field.
First	Type the staff member's first name.
Preferred	Optional field. Type the staff member's preferred first name.
Middle	Optional field.
Last	Type the staff member's last name.
Suffix	Optional field.
Gender	Select the staff member's gender from the drop-down list.

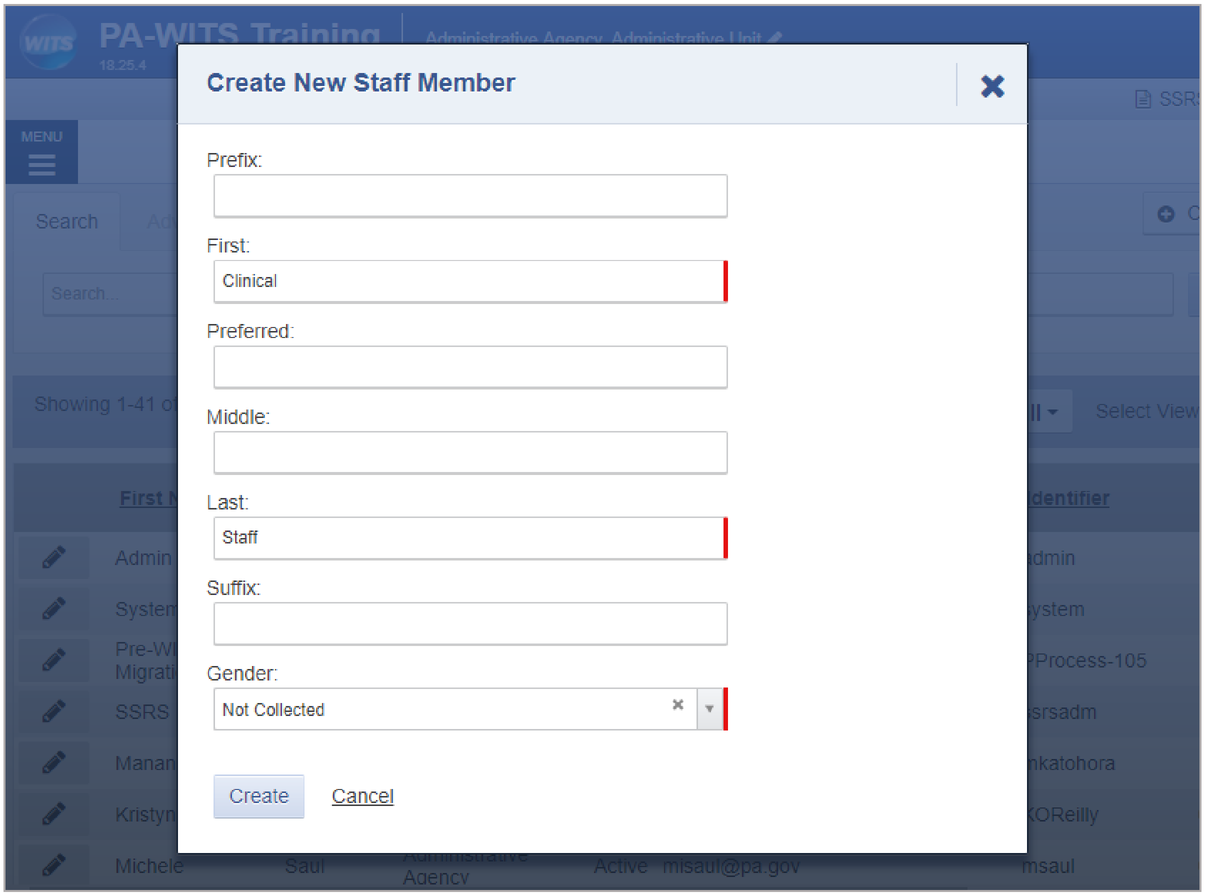


Figure 11-3: Create New Staff Member screen

4. Click **Create**. The system will redirect to the Staff Member Workspace screen.

Note: The Create button will only appear when all of the required fields have been completed.

Completion Requirements

On the Staff Member Workspace screen, note the Completion Requirements located on the right side. The completion requirements can be entered in any order.

Figure 11-4: Completion Requirements

Add Email Address

5. On the Staff Member Workspace screen, point to the **Completion Requirements**.

6. Click **Add Email Address**. This will open the Contact Information panel.

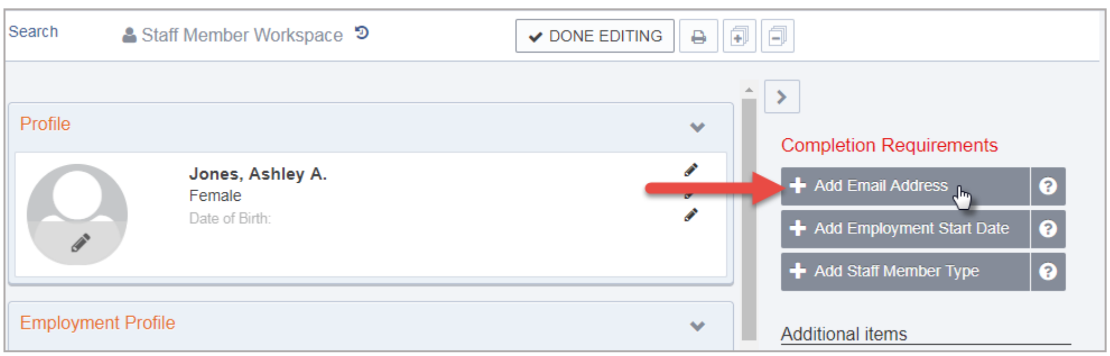


Figure 11-5: Completion Requirements, Add Employee Start Date

7. On the **Contact Information** panel, type the staff member's email address, check the Primary box and then click **Save**.

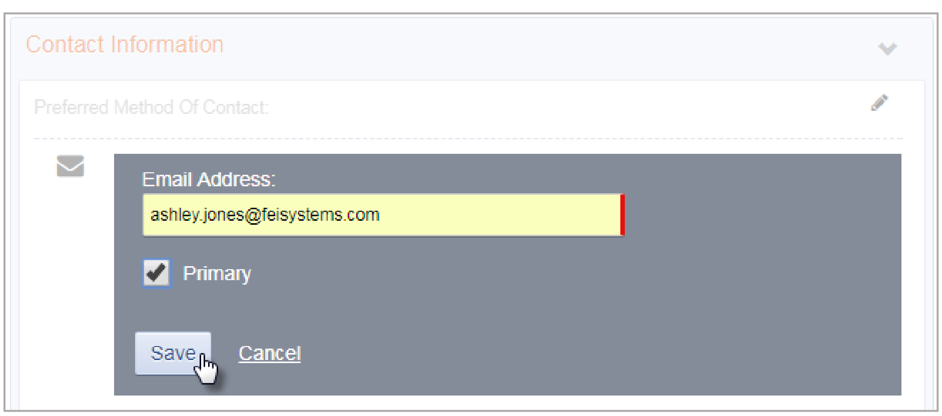


Figure 11-6: Contact Information panel, add primary email address

Note: Staff members can have more than one email address associated with their account, however at least one email address must be marked as "Primary". The Primary email address will receive email notifications for the user to access their account.

Add Employment Start Date

8. On the Staff Member Workspace screen, point to the **Completion Requirements** and then click **Add Employment Start Date**. This will open the Employment Profile panel.

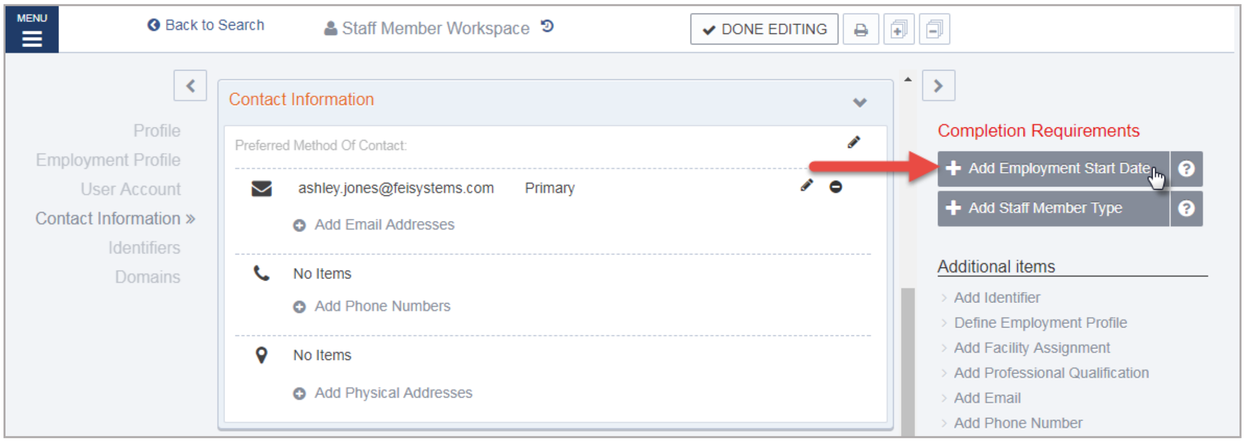


Figure 11-7: Add Employment Start Date

9. On the Employment Panel, in the **Employment Date Range** field, enter the employee's start date or use the calendar to select the start date. Stay on the Employment Panel.

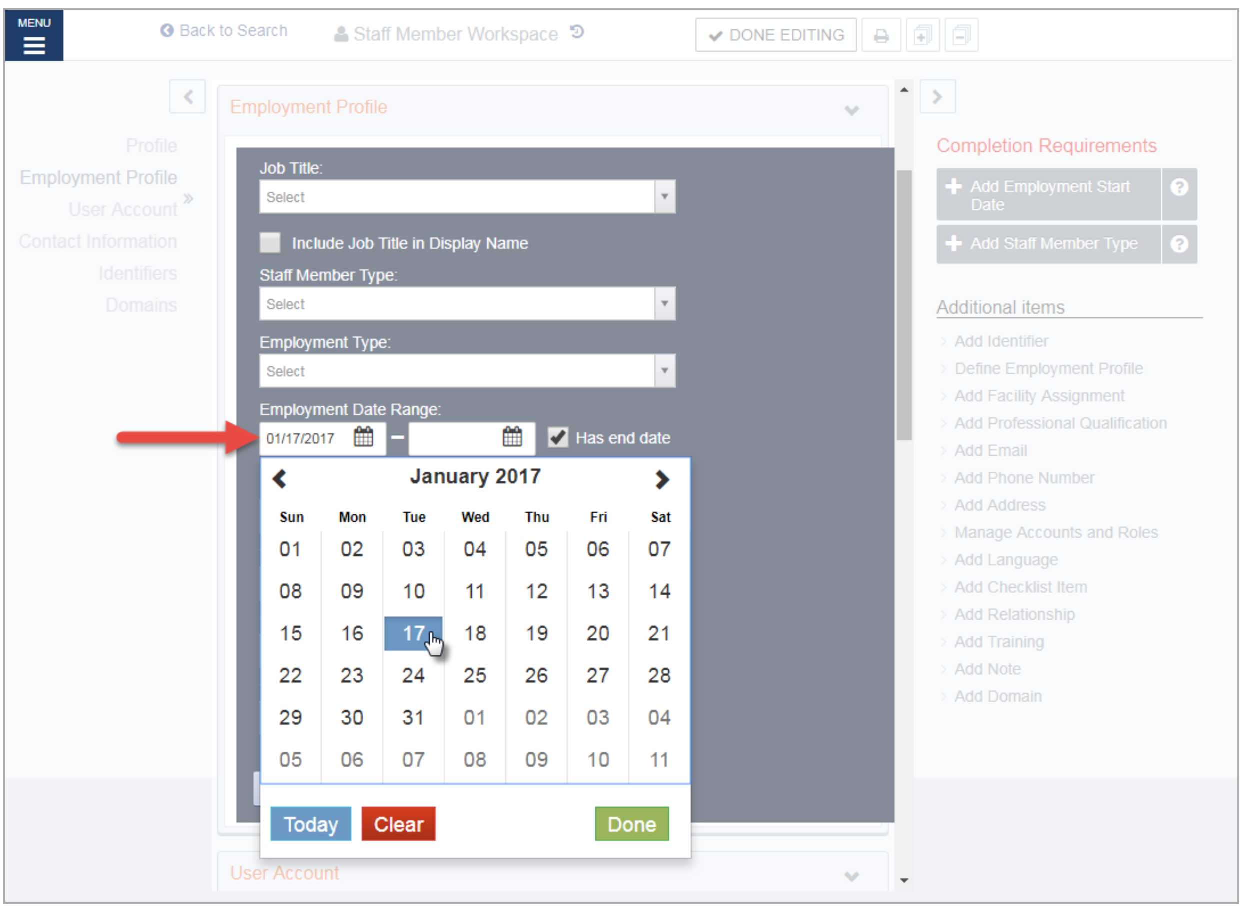


Figure 11-8: Employment Profile panel, Employment date range

Add Staff Member Type

10. On the Employment Profile panel, in the **Staff Member Type** field, select an option from the drop-down list or search for a value.

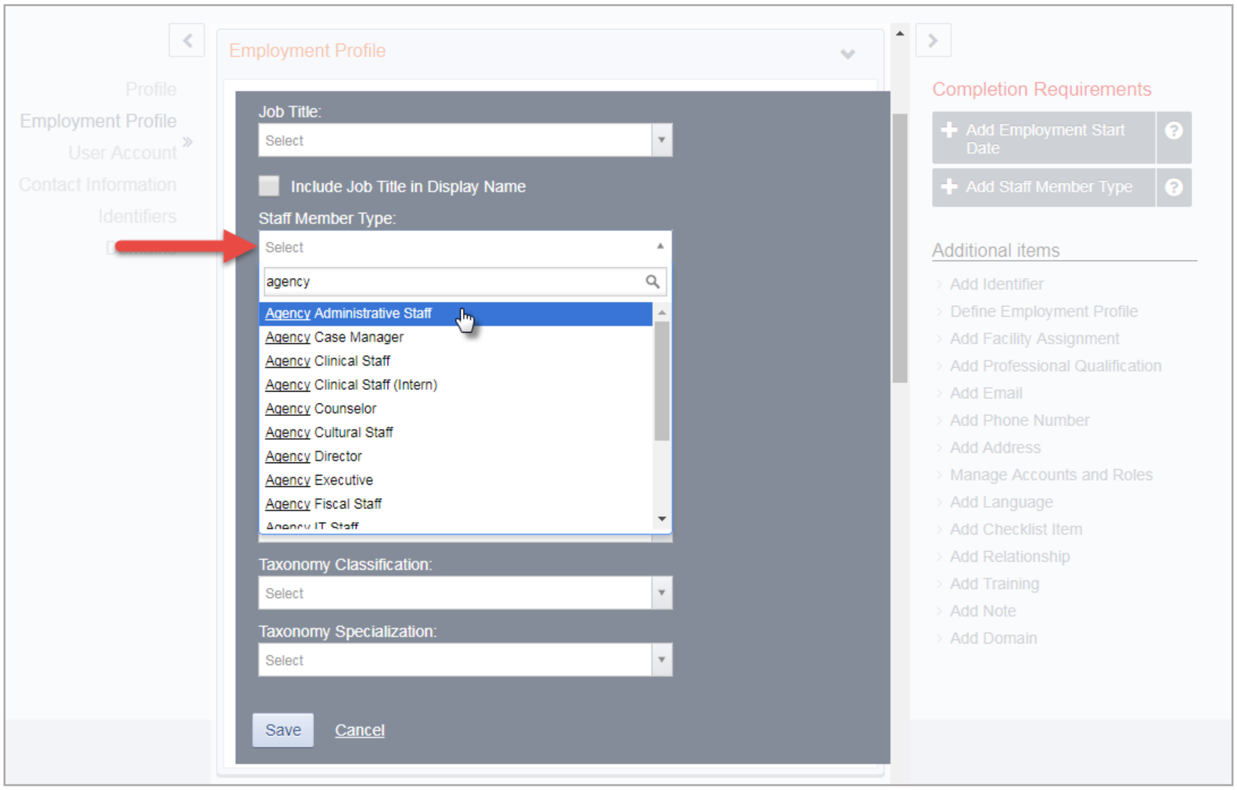


Figure 11-9: Employment Profile panel, Staff Member Type field

11. On the Employment Profile panel, click **Save**.

Note: On the Employment Profile panel, certain options in the Staff Member Type field control additional features within WITS.

Add Facility Assignment

The Facility Assignments section allows you to assign one or more facilities for the staff member.

12. Point to the Additional items section, and then click **Add Facility Assignment**.

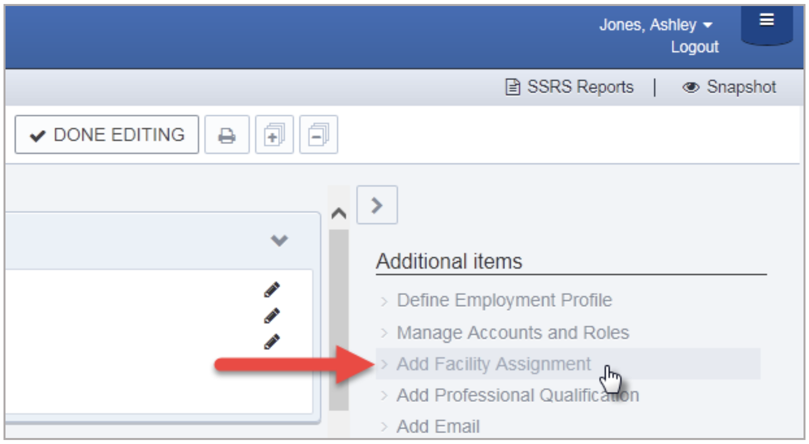


Figure 11-10: Additional Items section, Add Facility Assignment

13. In the Facility Assignments section, click on the applicable facilities.

14. Select the **Effective Date**.

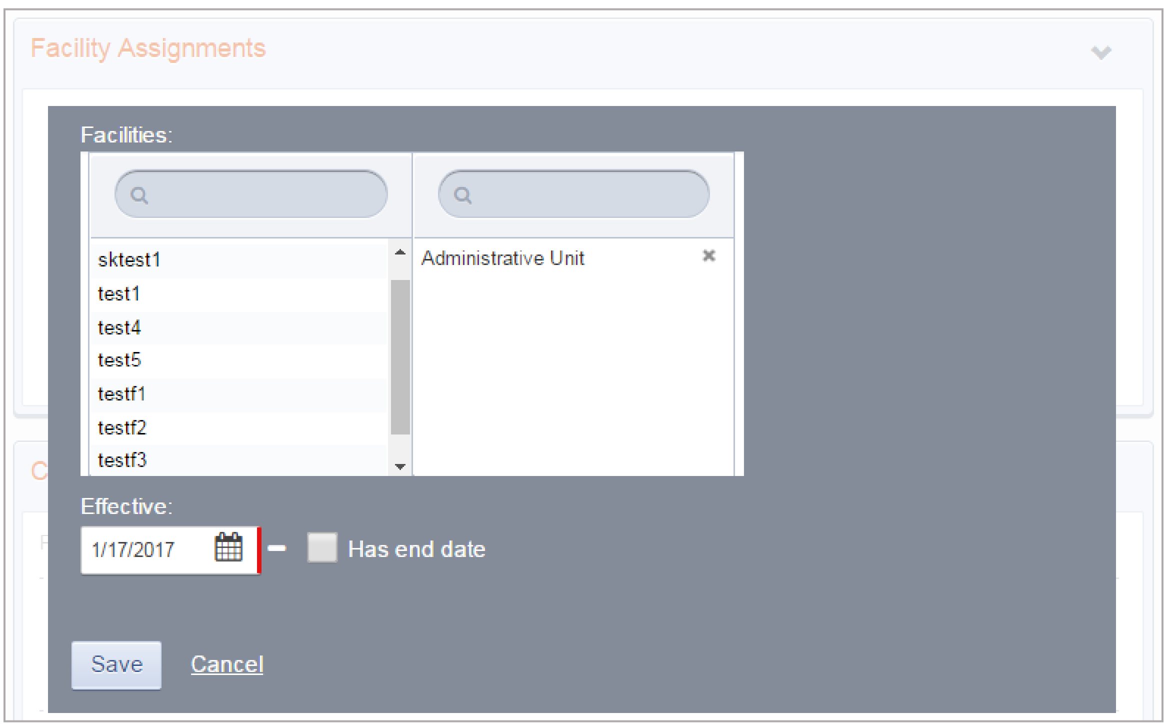


Figure 11-11: Facility Assignments panel

15. Click **Save**.

Add User Account

Once items in the Completed Requirements sections have been met for a Staff Member, a user account can be created for the staff member. The user account will allow the staff member to log into WITS and perform various functions based on the roles granted to their user account.

16. In the **User Account** panel, click **Add Account**.

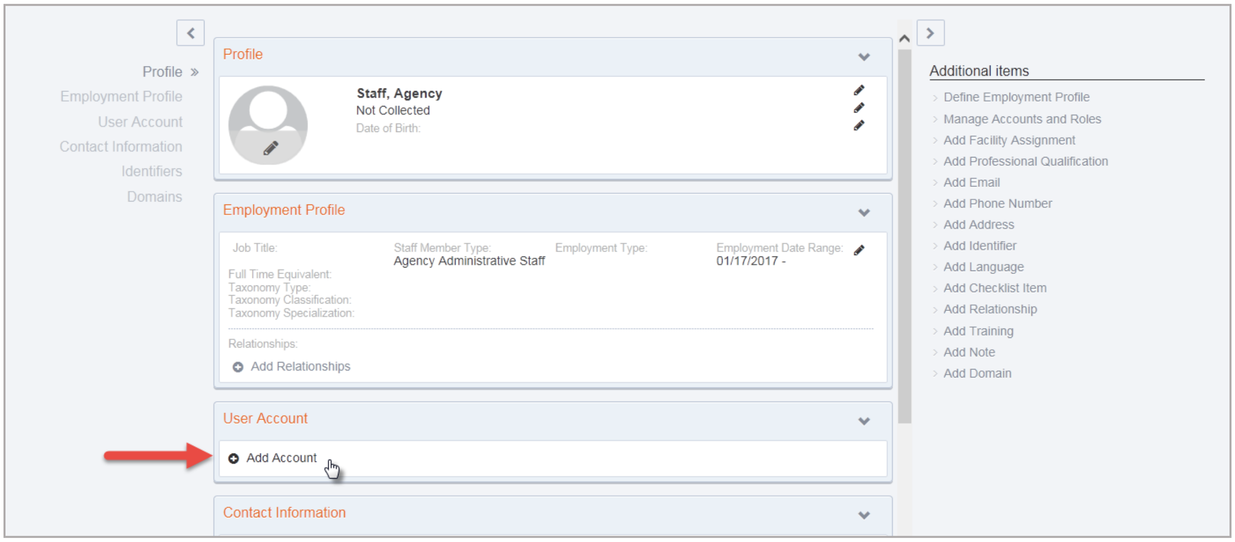


Figure 11-12: User Account panel, Add Account

17. In the **User ID** field, type the staff member's login name.

Important: The User ID must be unique for each staff member. Once an account is created, the User ID cannot be changed.

18. In the **Email Address** field, type the staff member's email address.

Important: WITS will send important login information using the email address provided in this section.

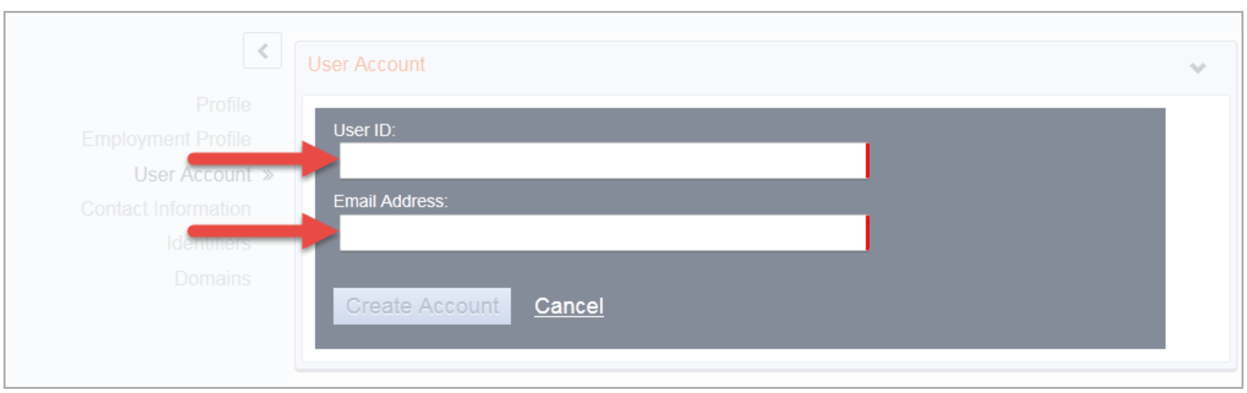


Figure 11-13: User Account panel, required fields

19. Click **Create Account**.

User Roles

After creating the User ID, roles can be granted to the staff member. When adding roles, it's important to consider the type of data the individual staff member will be entering and what type of information the individual needs access to within WITS.

Table 11-2: Role Table

Job Function	System-Level Roles (Assigned under System Administration> System Accounts)	Agency-Level Roles (Assigned under Agency>Staff Member)
Managing Entity Users	Access all oversight agencies in **read-only** mode	
	Facility Administrator	
	Program Set Up	
	Staff Administrator	
	View Consented Clients	
	Clinical (Full Access)	
	SSRS Agency Reader	
	Can Associate/Dissociate Agency Account	
Provider Agency Users		Clinical (Full Access)
		Case ReOpen
		View Consented Clients
		CONTINUUM™ Assessment Clinician
		SSRS Agency Reader
		Staff Administrator *Note – this should only be provided to users responsible for support/agency administration.*

Assign User Roles

20. In the User Account panel, click **Manage roles**. *(Continue to next page)*

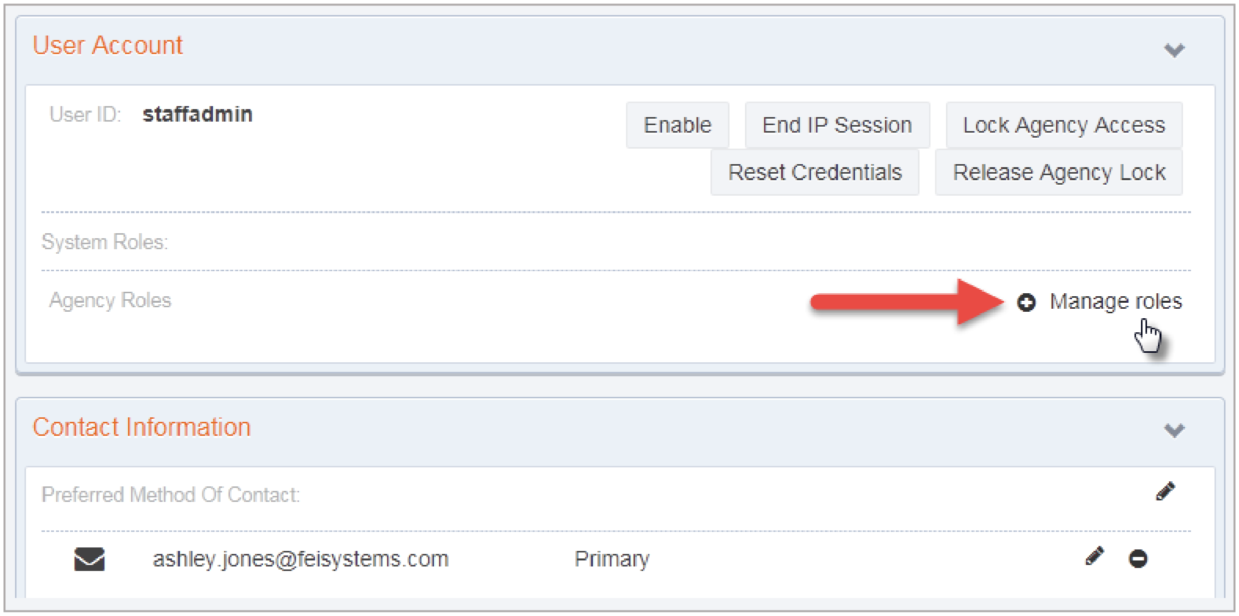


Figure 11-14: User Account panel, Manage Roles link

Manage Roles Screen: User Interface

There are two panels on the Manage Roles screen. The left panel displays a list of Available Roles, while the right panel displays a list of Assigned Roles. See Figure 11-15 for additional information about features displayed on the Manage Roles screen.

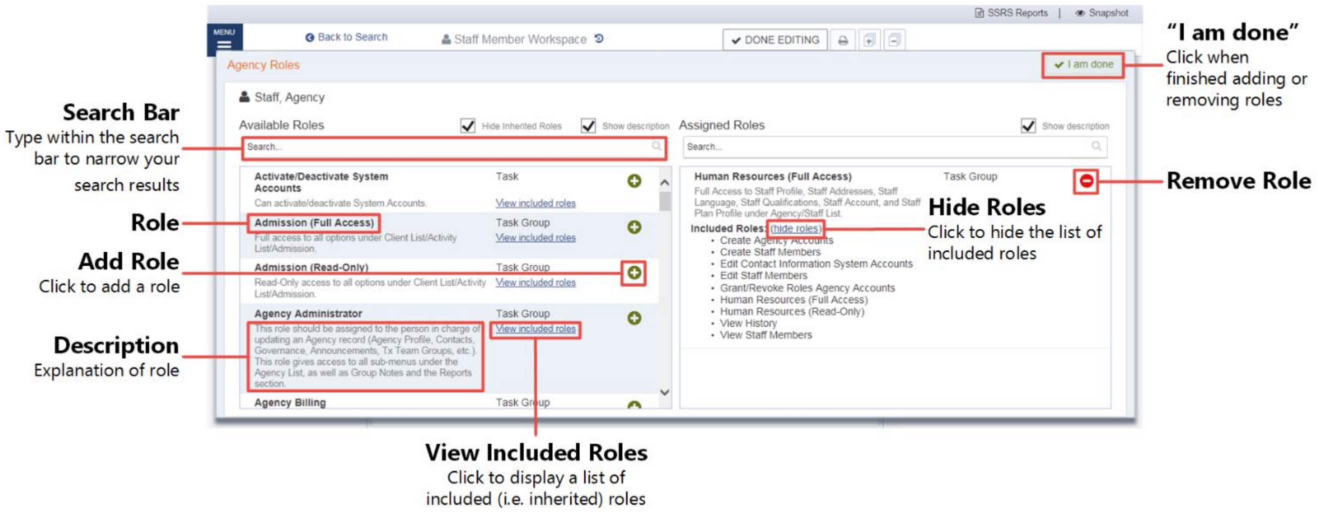
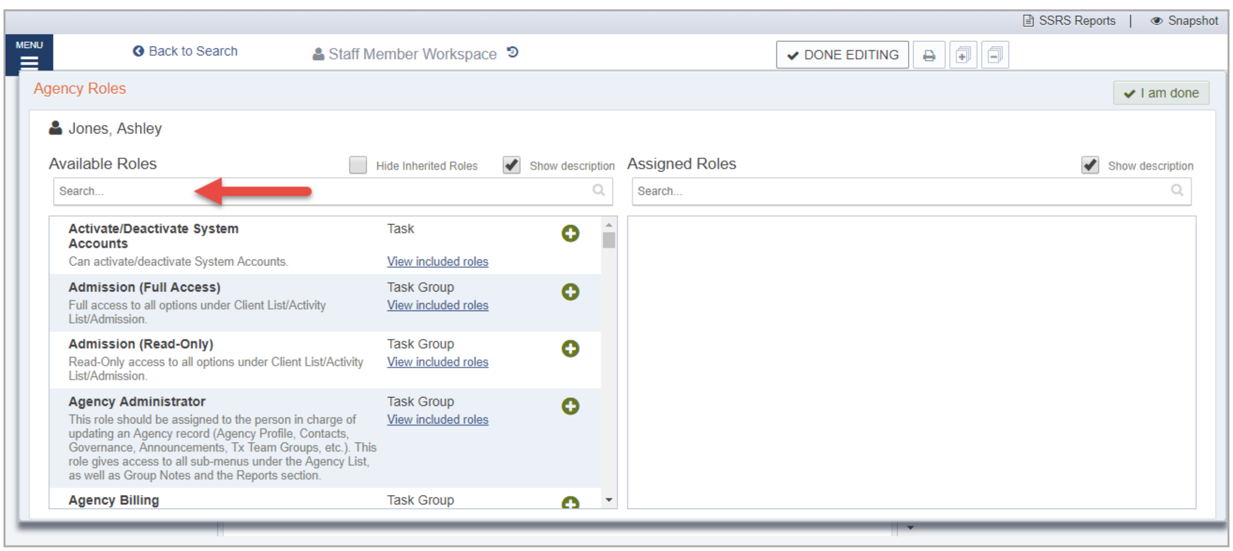


Figure 11-15: Manage Roles Screen

21. Use the **Search** bar to type the name of a role, or scroll through the list to find the correct role(s).



22. To add a role, click the green plus sign. To remove a role, click the red minus sign.

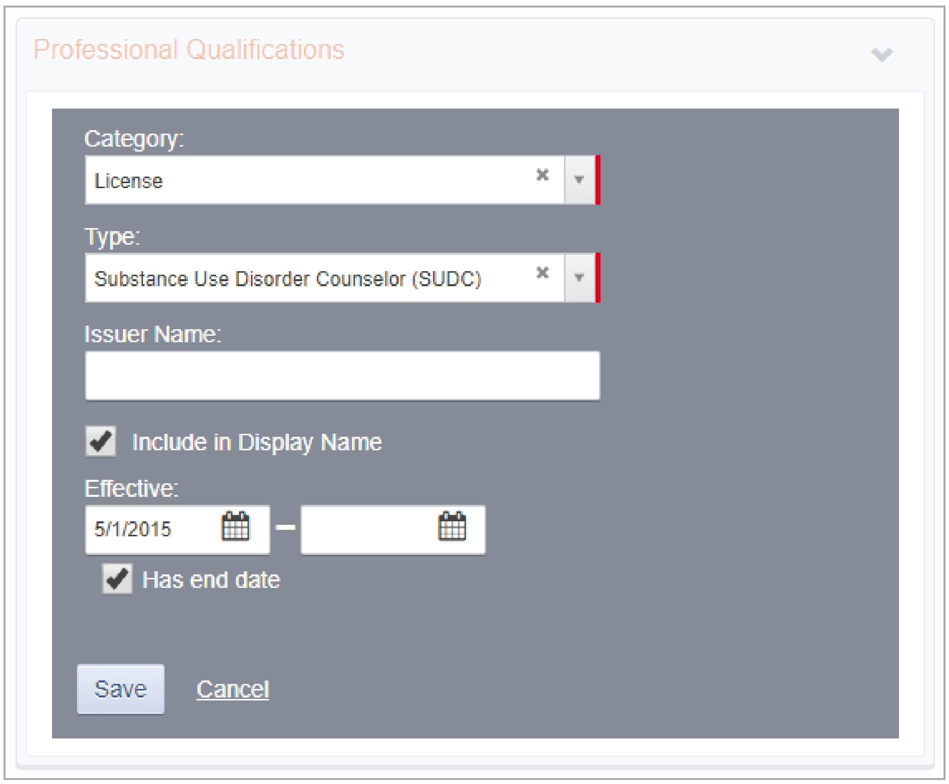
23. When finished assigning roles, click **I am done.**

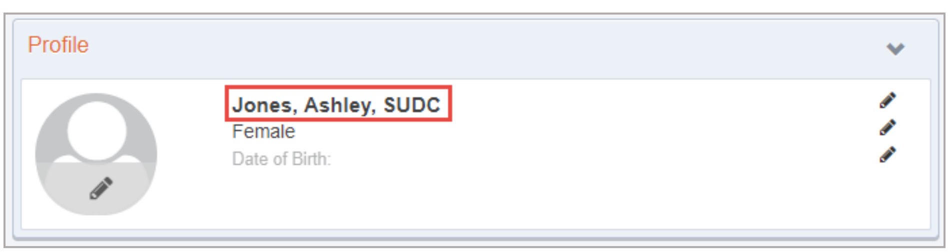
Adding additional items to a profile

The remaining items under the Additional items section allow the user to customize the staff member's profile with relevant data.

Account Rules/Other Functionality

- **End Date**: Importance of End date – This field drives a few things on screen; when someone has an end date, they will no longer appear in certain drop down boxes throughout the system.
- **Display Credentials**: When the "Include in Display Name" box is checked, the staff member's credentials will be displayed when they sign a note. This box can be found on different panels in the staff member profile.
- **Professional Qualifications**: In the Professional Qualifications panel, the staff member's licenses, degrees, and certificate information can be recorded. This information can also be included in the staff member's display name.





Locking Staff Member Access

When a user's access to the system needs to be taken away for any reason, the Staff Administrator can "Lock" a user account. The Staff Administrator can reach the Lock Agency Access action in 2 ways.

Option 1: Staff Member Search Screen

1. From the **Staff Member Search Screen**, you can select the **Lock Agency Access** action from the list screen for the staff person you wish to lock.

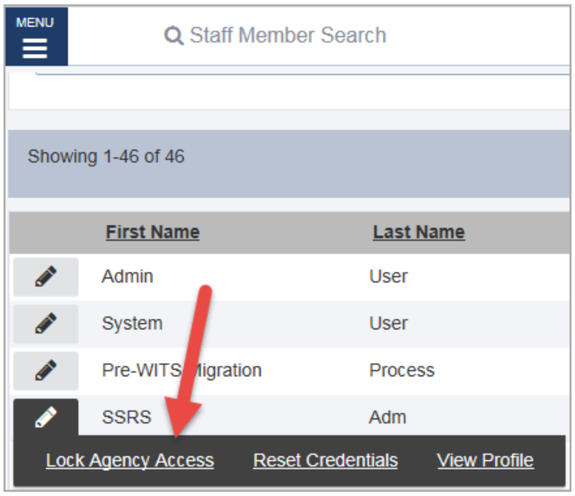
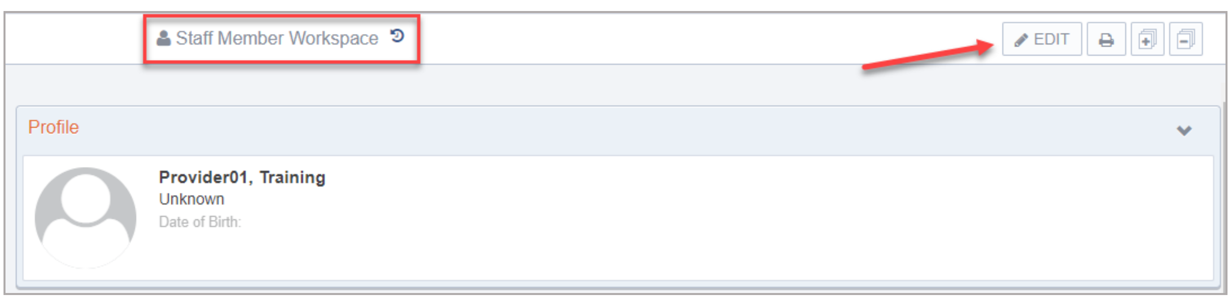


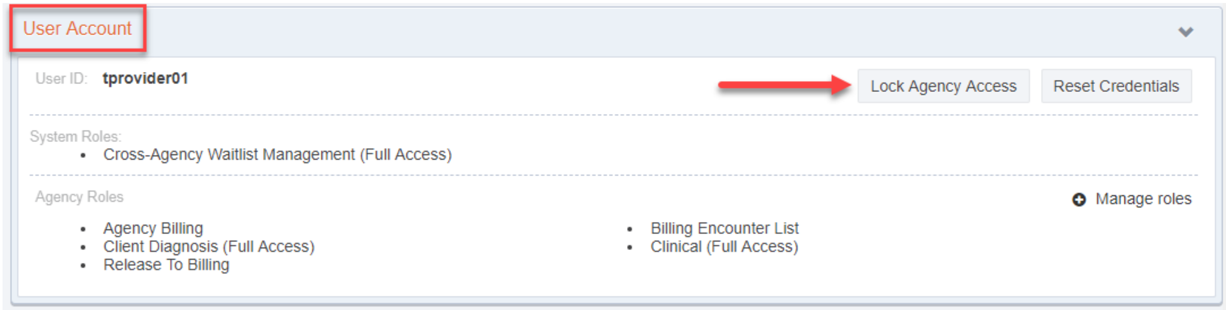
Figure 11-16: Staff Member Search Screen, Lock Agency Access

Option 2: Edit Staff Member Account

From within the **Staff Member Workspace**, the Staff Administrator can Edit the workspace and use the User Account panel to select the **Lock Agency Access** action**.**

2. Click **Edit**.





24. When you select **Lock Agency Access** button, you are required to enter a Lock Reason. Enter a reason and click **Lock**.

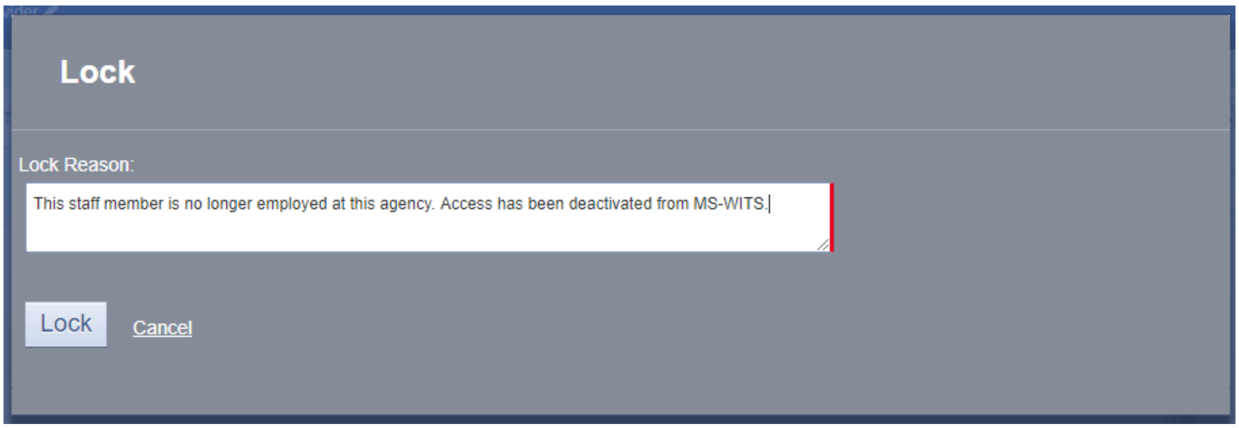
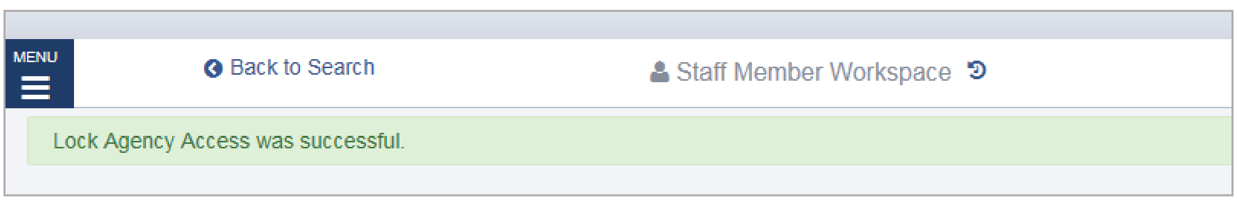


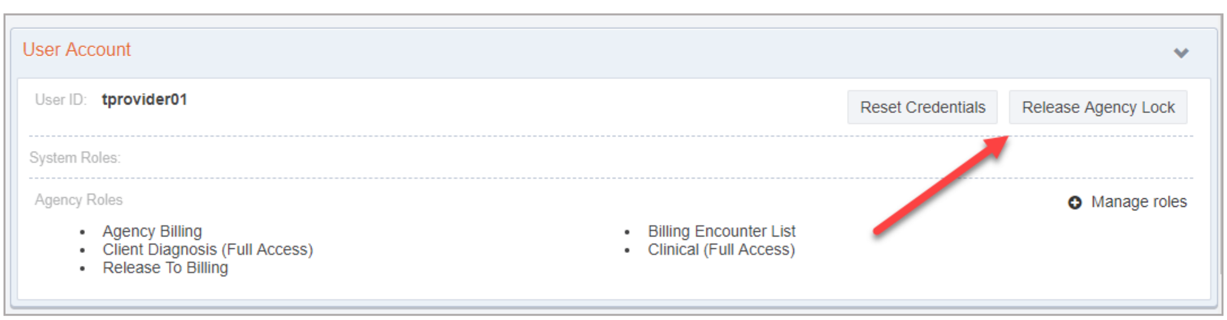
Figure 11-17: Lock Reason

25. When you click **Lock,** the user will see the “Lock Agency Access was successful” message at the top of the workspace.

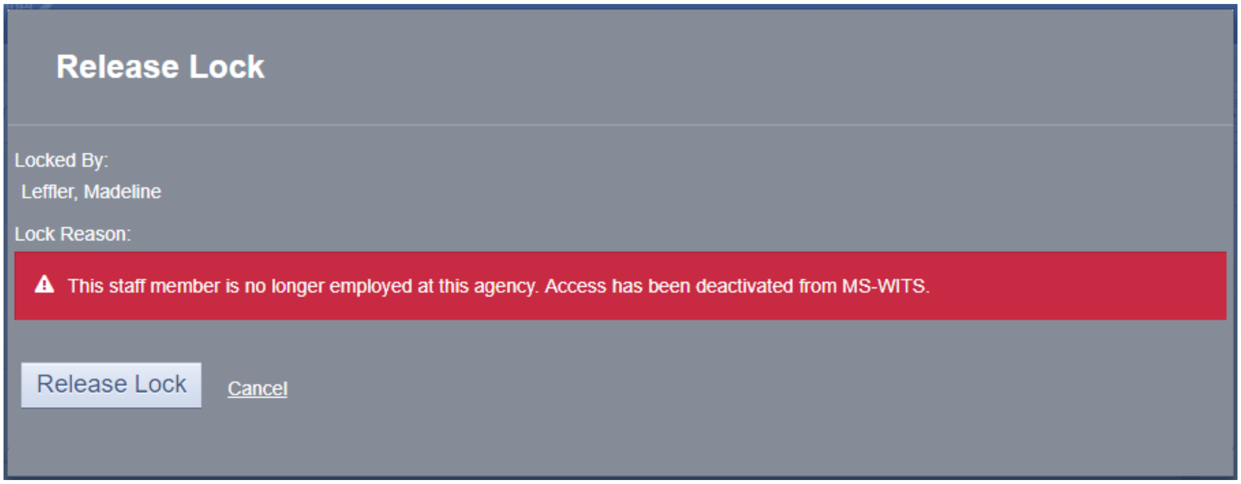


26. This staff member can no longer gain access to WITS.

27. If for some reason, you want to release this lock, a Staff Administrator can get to the Release Agency Lock from the **Staff Member Search** screen or use the **Staff Member Workspace** User Account panel to **Release Agency Lock**.

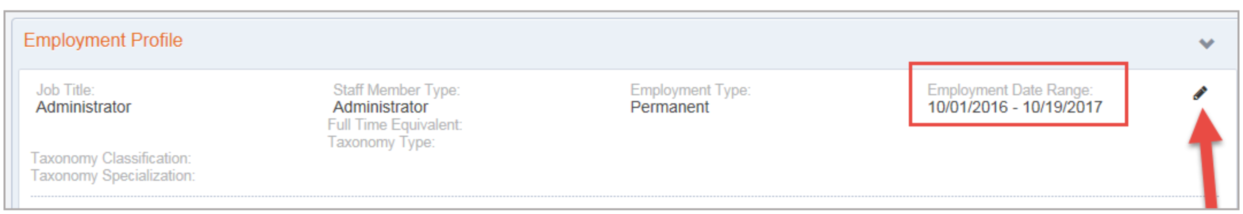


28. Release Lock window displays the Lock Reason that was entered in red, Staff Administrator can select the **Release Lock** action.



29. When you click **Release Lock,** the user will get Release Agency Lock was successful message at the top of the workspace.

Note: When an individual is no longer working for an agency, a Staff Administrator can Staff Member Workspace and edit the Employment Profile panel and enter an End Date for the Employment Date Range. Entering an End Date, will remove that person's name from appearing in drop down values 30 days after the End Date entered.



Appendices

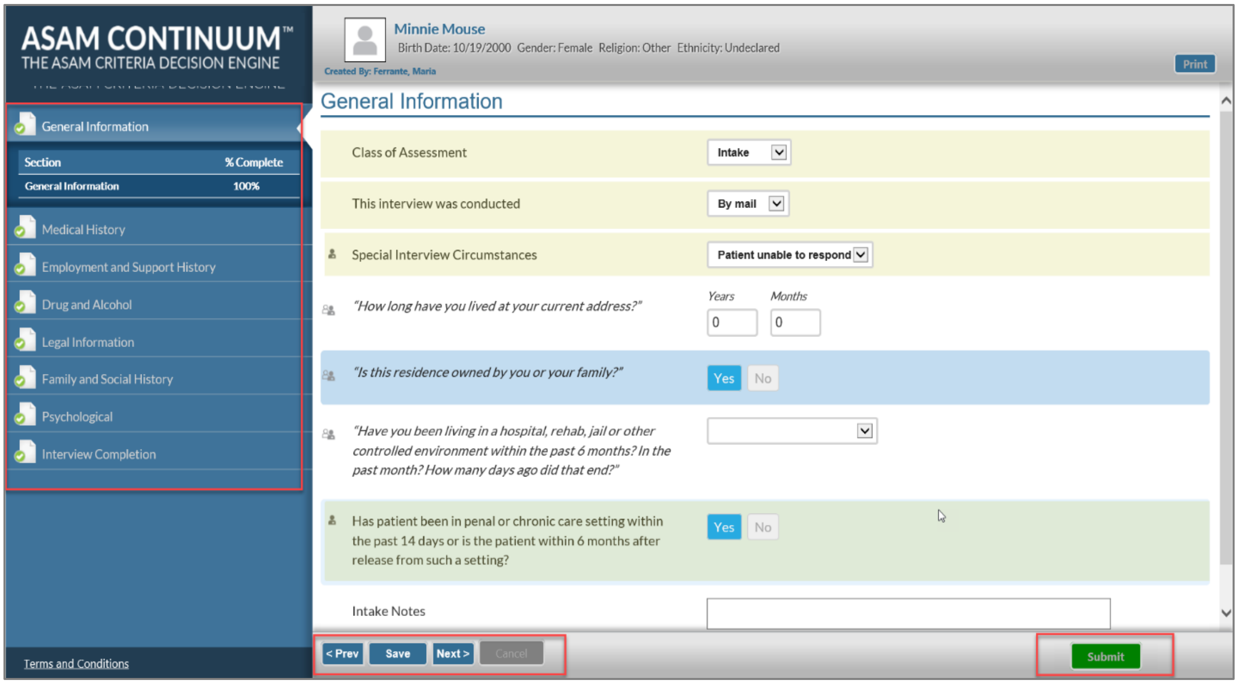
ASAM CONTINUUM™ Data Entry Conventions

The following are ASAM CONTINUUM™ data entry conventions that users should familiarize themselves with BEFORE administering an ASAM CO-Triage ™ Screener or ASAM CONTINUUM™ assessment. Review the ASAM CONTINUUM Product Line User Manual for in depth system nuances.

- All yellow questions are required and must be answered in each section and subsection
- All white questions are optional questions
- A green **Submit** button appears once all yellow questions in all sections and subsections have been completed.
- Information that you enter in the Drug and Alcohol summary section, will cause additional detail sections to be generated.
- For example – if you select Alcohol as the only problem substance – there will only be a detail section on Alcohol that needs to be completed.
- However, if you select Alcohol, Heroin and Other Substances, you will need to complete corresponding detail sections for Alcohol, Heroin and Other Substances.
- **Save** at the end of each screen.
- Once **Submit** is clicked, all questions and answers become read only and the CONTINUUM report is generated
- The optional Review Section appears in the CONTINUUM navigation panel for the user to complete if desired.

The CONTINUUM™ assessment has multiple sections.

- The information at the top of the assessment came from information entered into the WITS Client Profile. If that information changes in WITS, it will be modified on the associated CONTINUUM™ assessment.
- The left navigation outlines the various sections with associated questions that the clinician will review with the client.
- Buttons at the bottom of the assessment aid the clinician in navigating back and forth through the various sections of the assessments. These buttons appear in the CO-Triage Screener but are not used as it only contains 1 screen.
- As sections are updated, the software will track a completion percentage on each section as well as an overall completion percentage. Sections that are complete will show a green checkmark.
- Once the clinician completes the assessment, a **Submit** button will appear at the bottom navigation. When the **Submit** button is clicked, the assessment is scored and the report is generated.


ASAM CONTINUUM™
THE ASAM CRITERIA DECISION ENGINE
General Information
Section % Complete
General Information 100%
Medical History
Employment and Support History
Drug and Alcohol
Legal Information
Family and Social History
Psychological
Interview Completion
Terms and Conditions
Minnie Mouse
Birth Date: 10/19/2000 Gender: Female Religion: Other Ethnicity: Undeclared
Created By: Ferrante, Maria
Print
General Information
Class of Assessment
Intake
This interview was conducted
By mail
Special Interview Circumstances
Patient unable to respond
"How long have you lived at your current address?"
Years
Months
"Is this residence owned by you or your family?"
Yes
No
"Have you been living in a hospital, rehab, jail or other controlled environment within the past 6 months? In the past month? How many days ago did that end?"
Has patient been in penal or chronic care setting within the past 14 days or is the patient within 6 months after release from such a setting?
Intake Notes
< Prev
Save
Next >
Cancel
Submit