ADMH SAIS

WITS Overview and Basic Navigation User Guide

Version 1.0

Prepared by FEI Systems

Date 12/01/2023

FEI Systems

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Record of Changes

Table 1: Record of Changes

Version Number	Date	Author/Owner	Description of Change
0.1	12/01/2023	Scott Wilson	Initial Draft
1.0	2/29/2024	Scott Wilson	Initial Submission to ADMH

1. INTRODUCTION

1.1. Purpose

This document offers an overview of the WITS application as well as basic navigation functions that all users will perform in their daily use of the application.

1.2. Audience

The intended audience for this WITS User Guide is all users regardless of their role. If they will be using WITS, then they should become familiar with the contents of this document.

2. GETTING STARTED

2.1. System Requirements

WITS is a web-based application that is accessible through the most up-to-date versions of the following web browsers:

- Google Chrome
- Microsoft Edge
- Apple Safari
- Mozilla Firefox

2.2. Pop-Up Blocker

Certain features in WITS, such as Snapshot and Scheduler, will open in a separate browser window. Ensure the browser allows pop-ups for the WITS application to avoid functionality issues.

For more information on how to disable the pop-up blocker for the web browser, reference the smart guide *Disable Pop-Up Blocker*.

2.3. URL Links

2.3.1. Testing/Training Environment

NOTE: It is recommended that users bookmark the links for quick access to the WITS environments.

To access your testing/training environment, use the following link:
<Insert testing/training environment link>

As with all training and testing environments, the following rules apply.

- The user's account credentials will match that of their actual role unless otherwise specified.
- Only fictitious data should be entered into the system. DO NOT use data from an actual client.
- Keep all entered data professional.
- If adding an email address to a fictitious account, the domain should be set to @test.com.

2.3.2. Production Environment

To access the production environment, use the following link:

https://al.witsweb.org/

3. ACCESSING WITS

3.1. User Account Setup

3.1.1. User Account Creation Emails

Before accessing the live environment, an administrator will need to create an account for the user. Once that is done, the user will receive two emails to their work email account. The first email will inform the user that an account has been created for them and provides them with their user identification. The second email will contain a link for the user to set their security credentials.

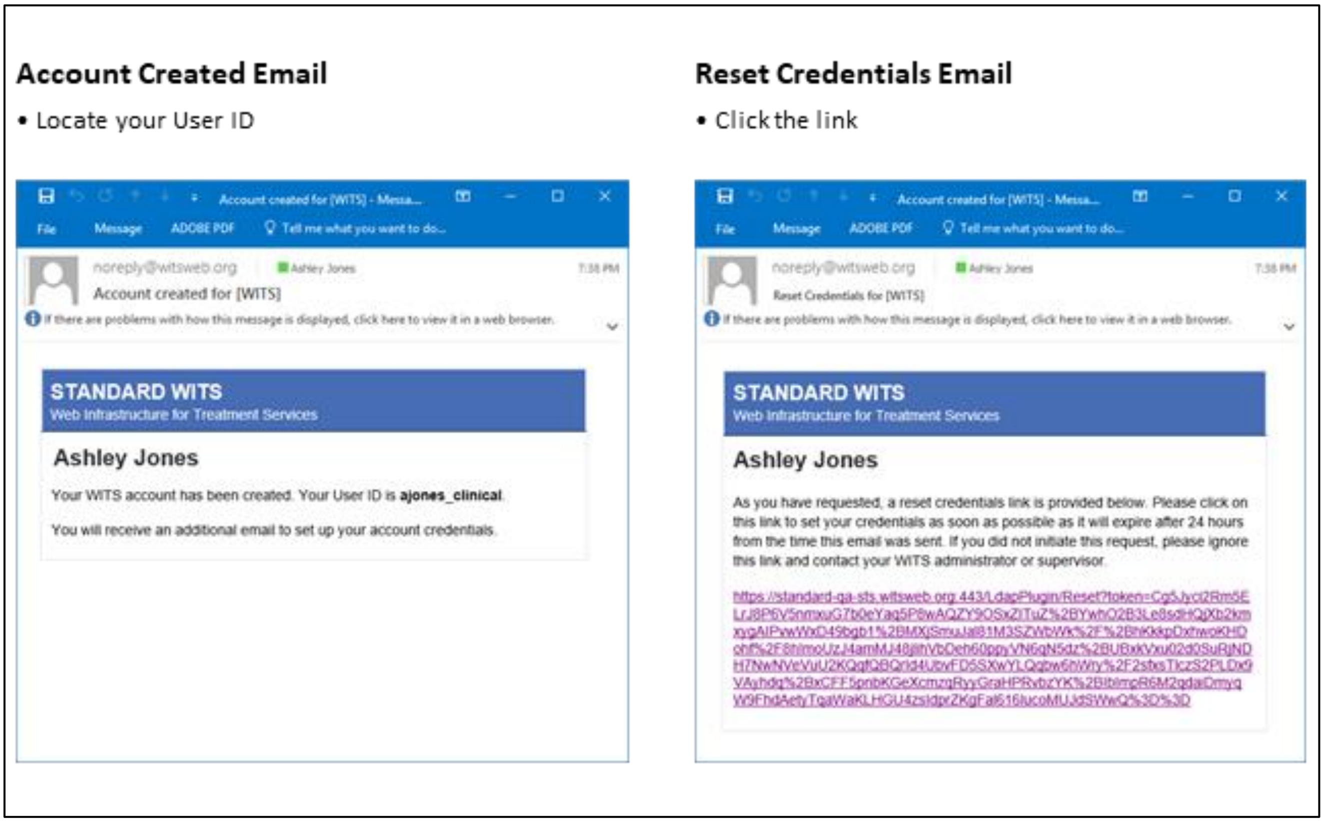


Figure 1: Account Creation Emails

NOTE: The link in the second email will expire 24 hours after it is sent. If the link has expired, the user will need to contact their system administrator to have a new link emailed to them.

3.1.2. Setting Security Credentials

When selecting the link in the second email the browser will open to display the following screen:

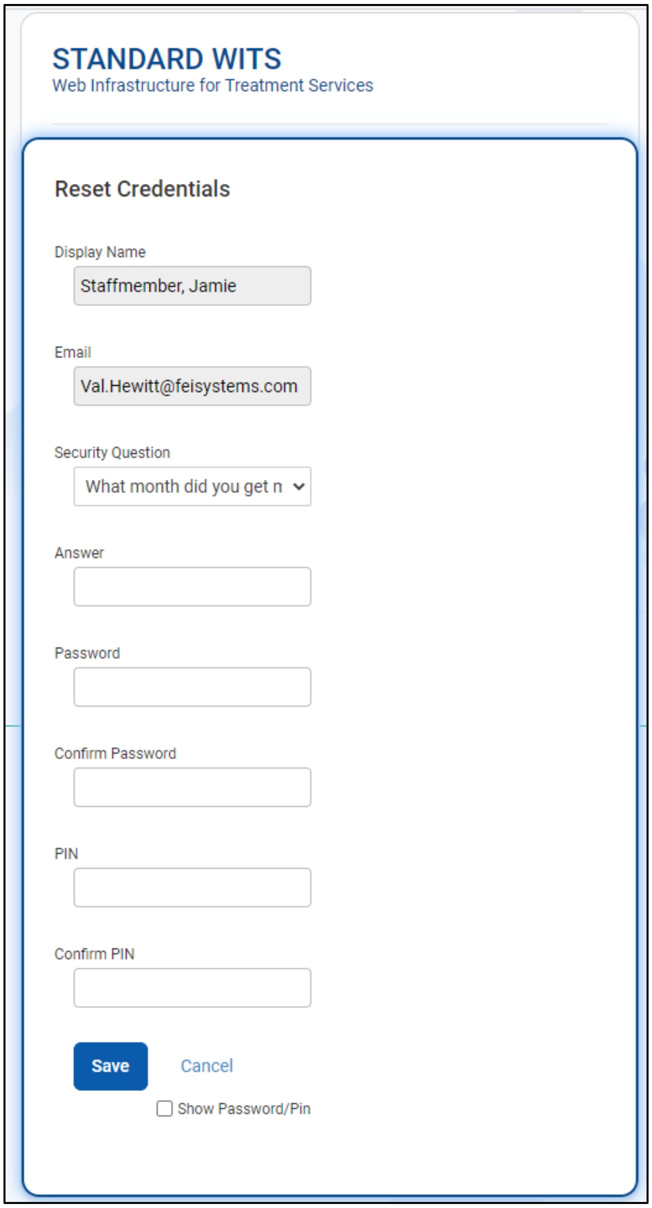


Figure 2: Reset Credentials

The table below provides information on the various fields and criteria for completing credentials setup.

Table 2: Reset Credentials

Field	Description
Display Name	Read-only field displaying the user's last and first name.
Email	Read-only field displaying the user's email address.
Security Question	Select a security question from the dropdown list. **NOTE:** This question is used to reset the user's password/PIN when the forgot password option is selected on the login page.

(Security Question) Answer	Type the answer to the security question. **NOTE:** The answer is case sensitive.
Password	The password must be at least six characters in length and contain at least three of the following: • Uppercase letter • Lowercase letter • Number • Punctuation **NOTE:** The requirements above may differ based on criteria established by the state.
Confirm Password	Retype the password. **NOTE:** Password and Confirm Password fields must match.
PIN	The PIN must be at least six characters in length and contain at least three of the following: • Uppercase letter • Lowercase letter • Number • Punctuation **NOTE:** The PIN cannot be the same as the password.
Confirm PIN	Retype the PIN **NOTE:** The PIN and Confirm PIN fields must match.

Once all fields have been completed, click on **Save**. The following screen will display.

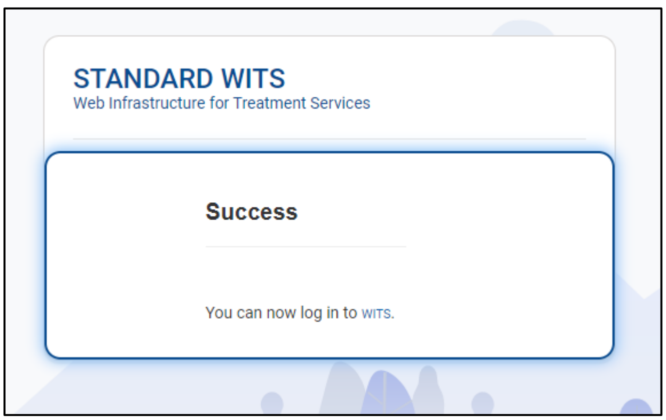


Figure 3: Success Screen

3.2. Logging In

Complete the following steps to login to the WITS environment.

1. The user opens the preferred internet browser and types the URL for the WITS environment being accessed into the search bar.
2. If the user bookmarked the link, then select it from the browser bookmarks.
3. Click **Continue** to acknowledge the system access warning message.

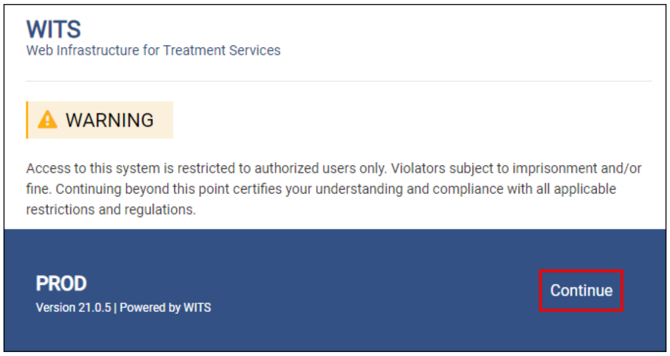


Figure 4: System Access Warning

4. The user enters their username, password, and PIN.
5. Click **Login**.

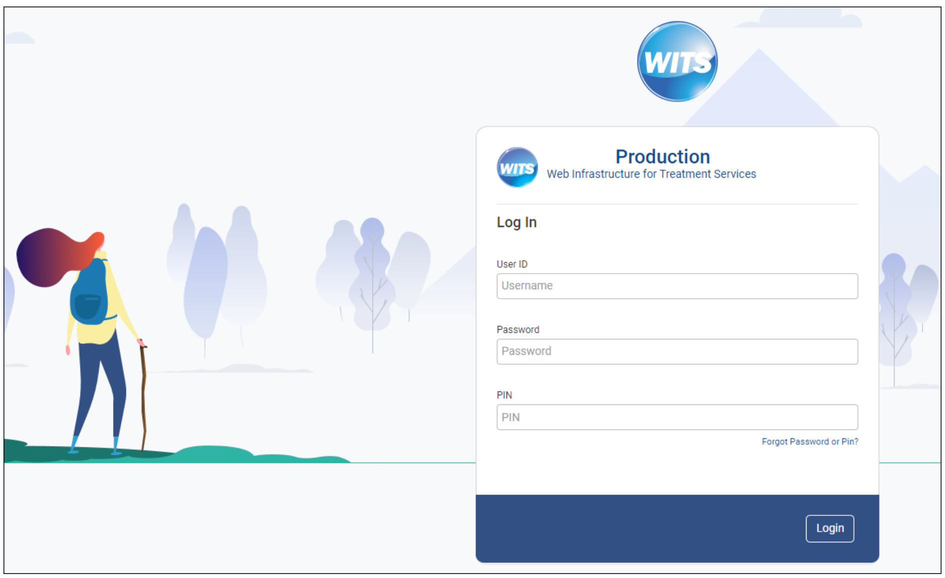


Figure 5: Login Screen

3.3. Log In Help

After three failed login attempts, the user's account will be locked. If this happens, the user will need to contact their WITS administrator to have their account unlocked and reset. To prevent a delay in accessing WITS, it is recommended to use the **Forgot Password or PIN** function after two failed attempts at logging in.

Below PIN on the login screen, click on **Forgot Password or PIN**.

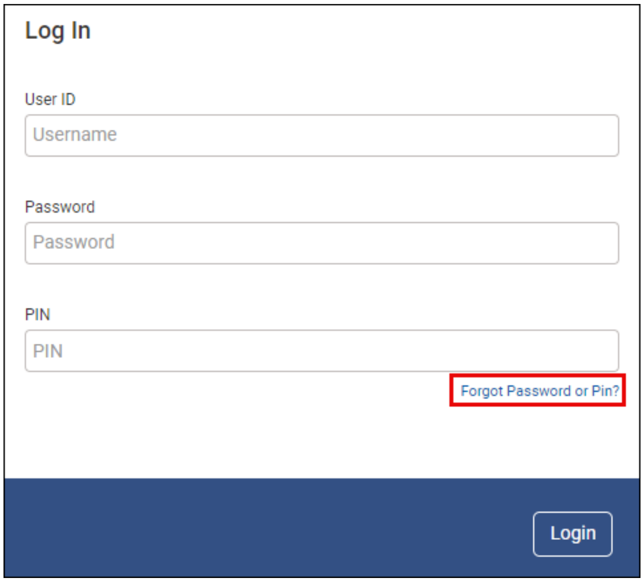


Figure 6: Forgot Password or PIN

Enter the **Username** and click **Submit**.

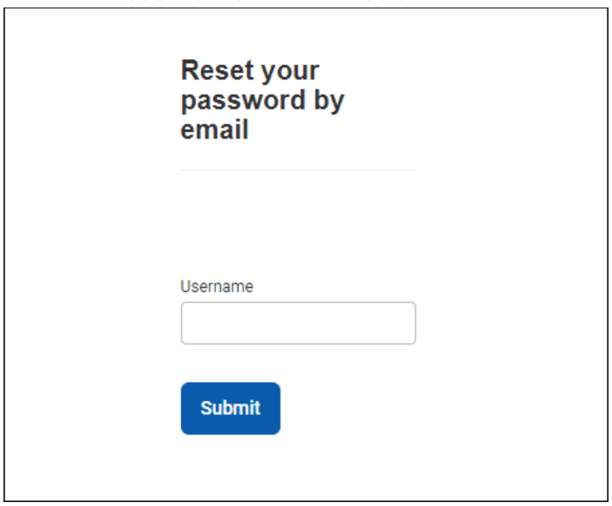


Figure 7: Reset Password - Username

The user will be asked to answer their Security Question. Remember that the answer is case sensitive.

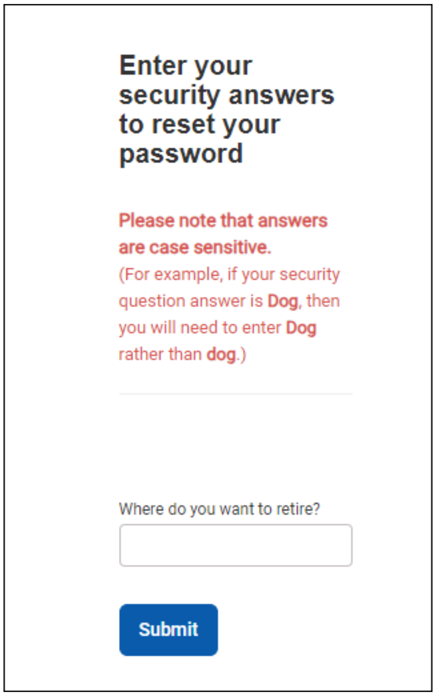


Figure 8: Security Question

Enter answer to displayed security question and click **Submit**.
An email will be sent from noreply@witsweb.org to the email address on file for the submitted username.
The email will include a link to reset the password and PIN.
The link will expire after 24 hours of it being generated.
Click the link within the email to be taken to the **Reset Credentials** screen.
The user types in their new password and PIN.
The user does not need to provide a new security question and answer.
Click **Save** to finalize changes.

4. DASHBOARD AND NAVIGATION

4.1. Dashboard

Once the user is logged into WITS, they will be taken to the Dashboard.

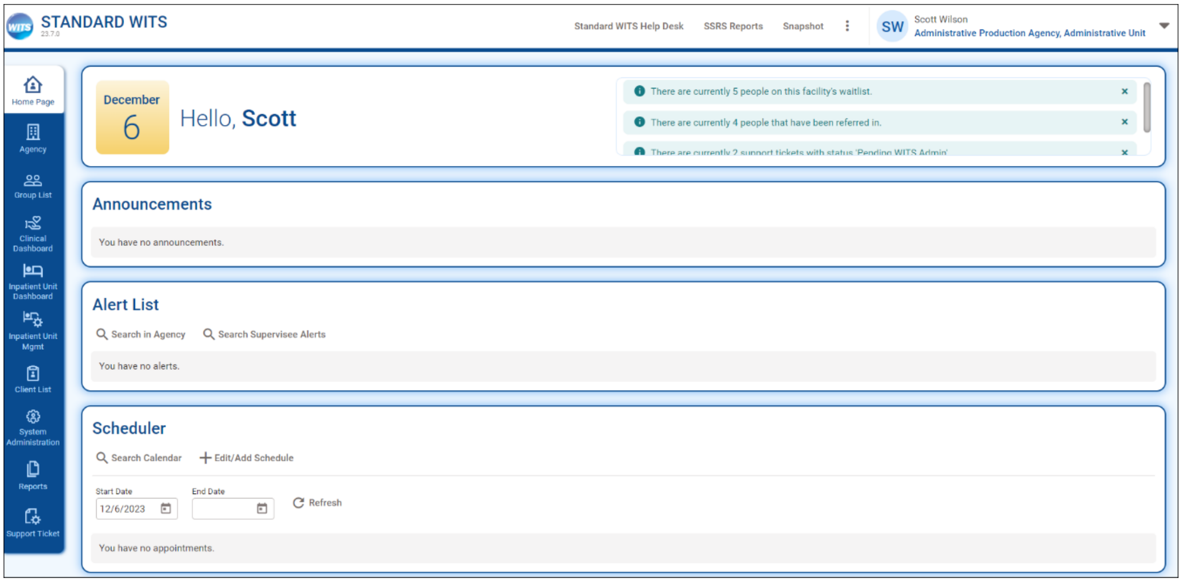


Figure 9: Dashboard

WITS is a customizable application that displays information and menu options based on the user's assigned roles. Roles are assigned by a WITS administrator to each user based on their job functions. This means what one user can see and access may differ from another user.

The dashboard is divided into three main parts.

4.1.1. Global Header

At the top of the screen is the global header. This section provides some information a user may find helpful as well as some navigation options.

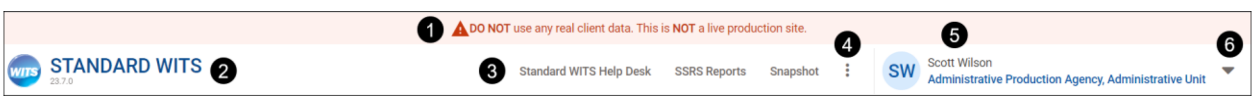


Figure 10: Global Header

Table 3: Global Header

	Global Header Item	Description
1	Warning Message	This message only displays in non-production environments and serves to remind the user not to use PII in testing environments.
2	WITS Instance and Version	This is the WITS instance currently being accessed. Below this is the Version of the instance that is being used. This may be needed for troubleshooting when contacting Helpdesk.
3	Global Header Links	Links that a user may find useful. Information about these links will be discussed later as they become relevant.
4	More Button (Vertical Ellipsis)	Any additional links not able to be displayed in the Header will be listed here.
5	User Specific Information	This section of the header identifies the user logged into WITS, as well as the Agency and Facility they are currently accessing.

	Global Header Item	Description
6	User Options (Down Arrow)	Select this option to access functions pertaining to the user. Change Credentials Logout

4.1.2. User's Dashboard

The User's Dashboard provides information specific to the user and their role. It is divided into four clearly defined sections.

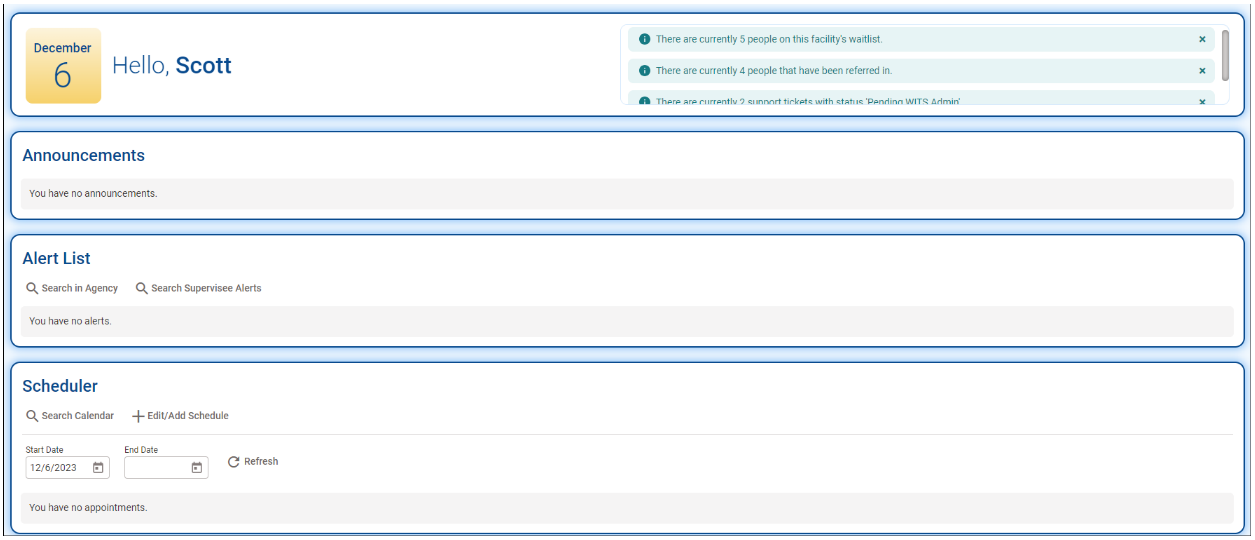


Figure 11: User's Dashboard

- Calendar and Notifications - This displays the current date, as well as Notifications.
- Announcements – These are system announcements that have been setup by a WITS administrator.
    - The information may pertain to every WITS user or may be specific to the user's agency and facility.
    - Announcements will usually only display for as long as they are relevant as defined by the administrator that created it.
- Alert List – Alerts will display based on preset triggers setup in system administration settings.
    - Alerts can be set to notify the user, department, or manager of an action or lack of action on a client.
    - If multiple alerts are listed, the user can click **Search** to narrow results.
- Scheduler – This serves as a calendar and task manager for the user. There are several functions available.
    - Search – Select this option to search for a specific appointment(s).
    - Edit/Add Schedule – Select this to add an appointment to the Scheduler.
    - Start Date and End Date – This allows the user to display results within the set range.
    - Refresh – This refreshes the Scheduler section.

4.1.3. Navigation Bar

Also referred to as the Left Navigation Bar, this section is how a user will navigate to the various parts of the application to complete their job functions.

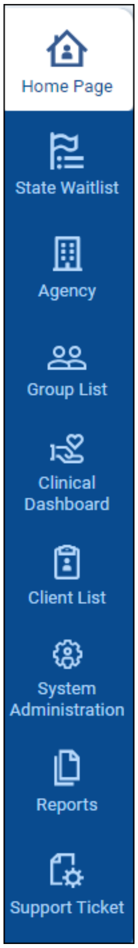


Figure 12: Navigation Bar

The menu options that display here will differ based on the WITS instance and assigned roles of the user. Most of these options will be covered in detail in their appropriate user guide. However, basic menu options are explained below.

- Home Page – Selecting this will always take the user back to the User's Dashboard.
- Agency – All functions related to an agency and its facilities are located here.
- Client List – Client management from intake through program enrollment and discharge and everything in-between.
- Reports – All available reports are stored here.
- Support Ticket – This option is selected if the user requires assistance with the application. This might include:
    - Questions not covered in user manuals or training.
    - Issues with the application not behaving as expected.

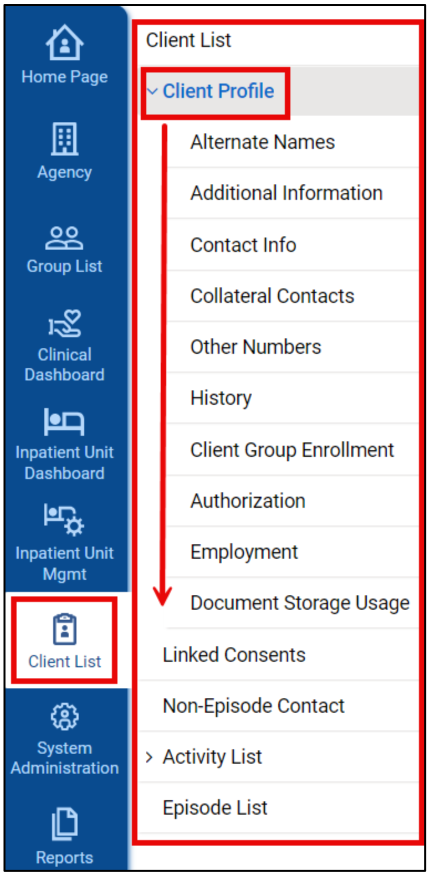


Figure 13: Menu and Sub-Menu

When a menu option has been selected, it will turn white. In some cases, a sub-menu will then display with additional options for the user. Some of these options can be further expanded by clicking on the parent folder, which will then expand to show the new options.

In the screenshot above, **Client List** was selected to display the sub-menu. Then, **Client Profile** was selected to show additional options.

This filing system allows for structured organization of content and quick navigation to information the user may need.

4.1.4. Client Ribbon

The look of the dashboard will change if the user has accessed a client's record.

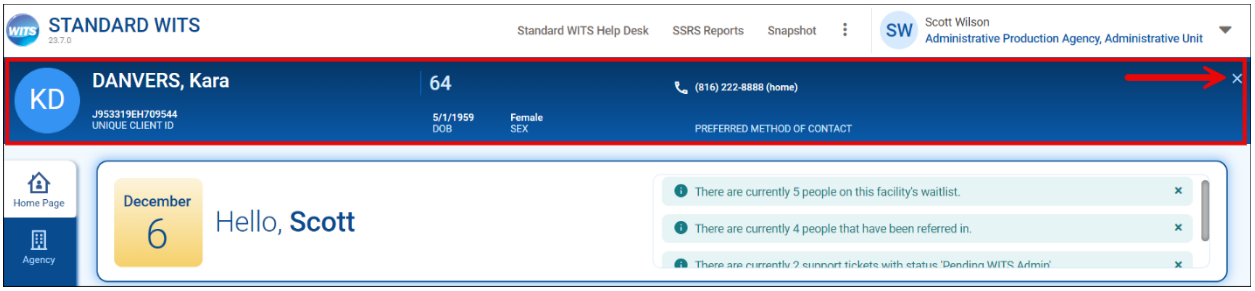


Figure 14: Client Ribbon

This ribbon informs the user that they are currently in the displayed client's record. Any changes the user makes on client related screens will affect this record. Therefore, it is important to verify the client displayed in this ribbon is correct before making changes to the client record screens.

To close out of the client, click on the "X" in the top right corner of the Client Ribbon.

Figure 15: Floating Client Ribbon

If the user scrolls down a screen and the Client Ribbon would no longer be displayed, an abbreviated version of it will float at the top of the screen so that the user always knows which client record they are currently accessing.

5. SCHEDULER

Scheduler allows a user to add appointments and tasks to their calendar in WITS. The Scheduler is part of the user dashboard.

Click **+Edit/Add Schedule** to open the Appointment window.

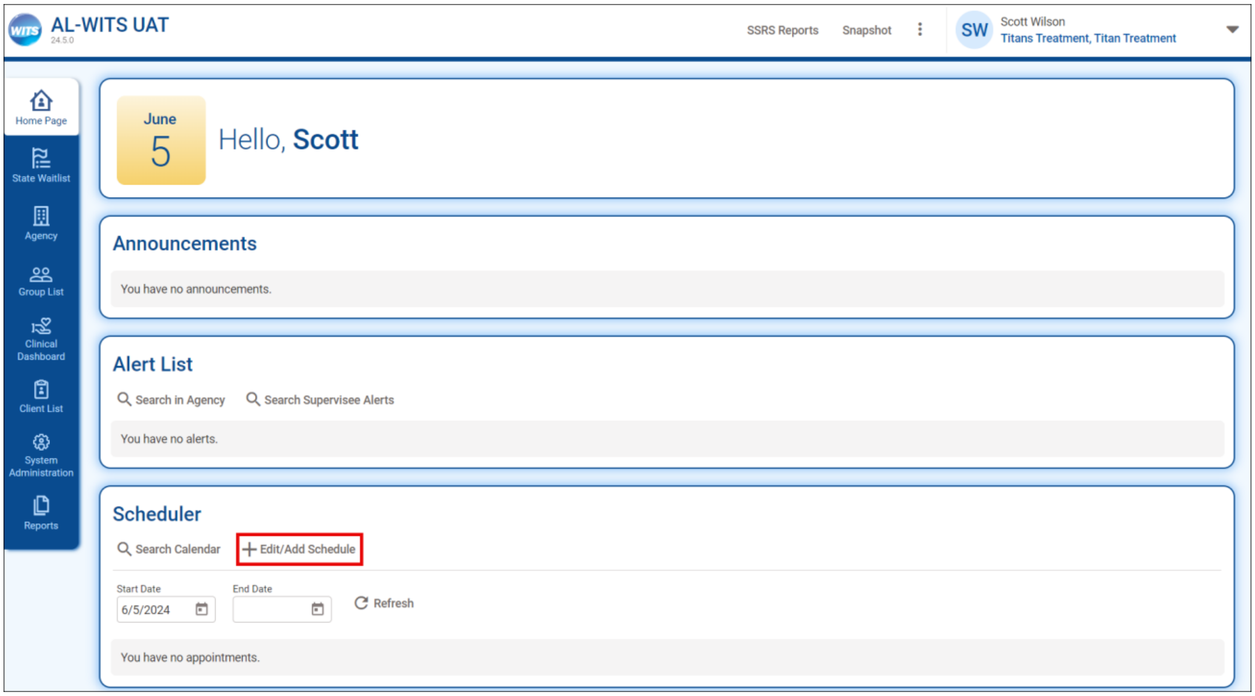


Figure 16: Add Appointment to Scheduler

5.1. Appointment Types

There are four different appointment types that can be added to the user's calendar.

- Normal
- Reserved
- Scheduled Client
- Scheduled Group

The appointment type selected will determine what fields display and need to be completed in the Appointment window.

5.1.1. Normal

Set the Appointment Type to Normal to add tasks such as meetings and personal time off to the calendar.

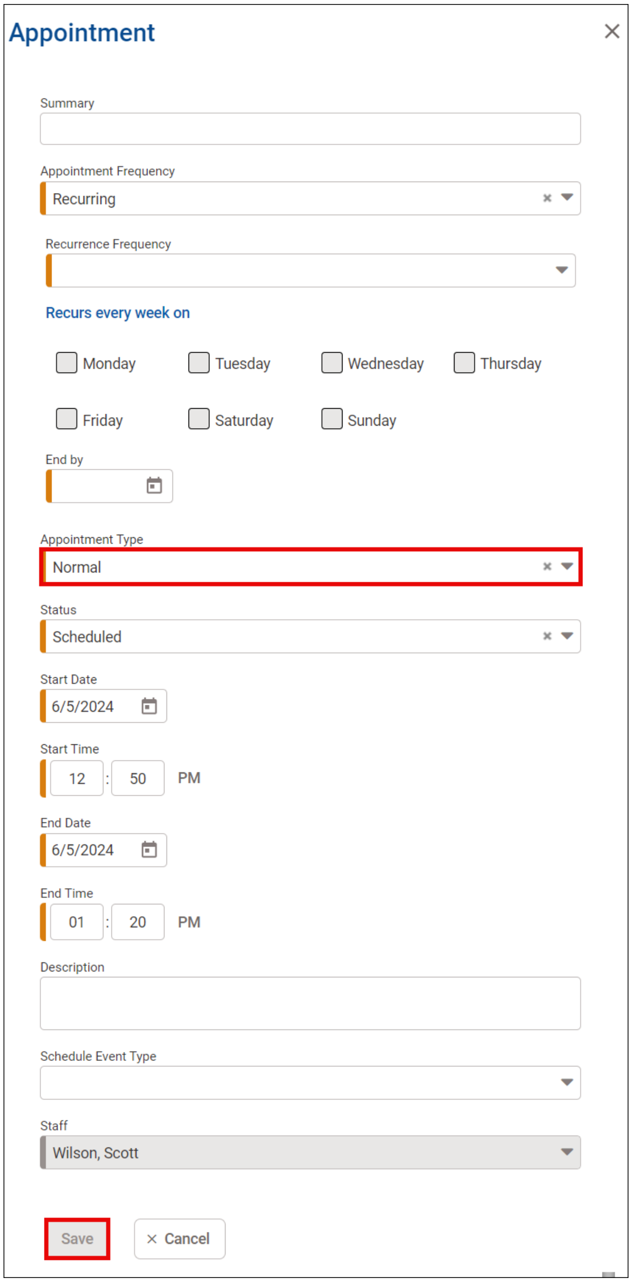


Figure 17: Appointment Type - Normal

See the table below for completing the Appointment fields.

Table 4: Appointment Type - Normal

Field	Description
Summary	A brief description of the appointment.
Appointment Frequency	• **Single** – The appointment only occurs once. • **Recurring** – The appointment will occur multiple times.
Recurrence Frequency	How often the appointment recurs.

	NOTE: This field only shows if Appointment is set to **Recurring**.
Recurs Every Week On	Identifies which days of the week does the event take place. **NOTE:** This option is only available for Recurrence Frequency – **Weekly**.
Use end after number of appointments not attended?	Click box if the daily recurring appointment ends if set number of appointment Status are marked as **No Show** or **Not Kept Appointment**. **NOTE:** This option only displays if Recurrence Frequency is set to **Daily**.
End after number of appointments not attended	Set the maximum number of appointments that can be missed before daily recurrence appointment is removed from schedule. **NOTE:** This option is only available if the field **Use end after number of appointments not attended** is checked.
End By	The last day the event will take place.
Appointment Type	**Normal**
Status	The status of the appointment. Set to **Scheduled** initially. **NOTE:** The status can be changed later to denote whether an appointment was kept or rescheduled.
Start Date	The date of the appointment or first appointment for recurrences.
Start Time	When the appointment starts. **NOTE: AM/PM** can be clicked and changed to denote morning of afternoon appointments.
End Date	Set to match the start date of the appointment. **NOTE:** If the appointment is over several days in a row (i.e. vacation) set End Date to match when the event ends.
End Time	When the appointment ends. **NOTE: AM/PM** can be clicked and changed to denote morning of afternoon appointments.
Description	Description and/or notes regarding the appointment.
Schedule Event Type	The type of event taking place.
Staff	This is set to the user automatically.

Save becomes selectable after all required fields are completed. Click **Save** to add the appointment to the calendar.

5.1.2. Reserved

This appointment status is used by contracting agencies to reserve time or meeting with clients or other events.

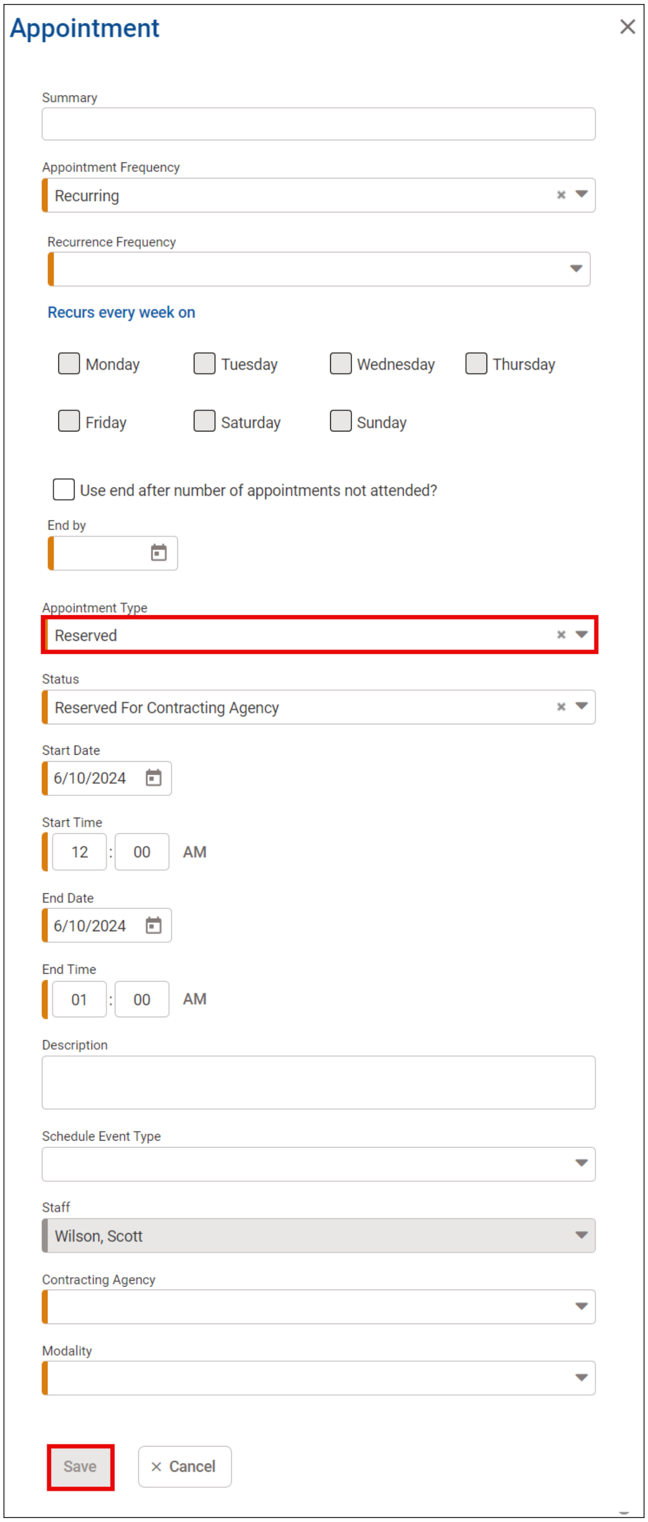


Figure 18: Appointment Type – Reserved

See the table below for completing the Appointment fields.

Table 5: Appointment Type - Reserved

Field	Description
Summary	A brief description of the appointment.
Appointment Frequency	• **Single** – The appointment only occurs once. • **Recurring** – The appointment will occur multiple times.
Recurrence Frequency	How often the appointment recurs. **NOTE:** This field only shows if Appointment is set to **Recurring**.
Recurs Every Week On	Identifies which days of the week does the event take place. **NOTE:** This option is only available for Recurrence Frequency – **Weekly**.
Use end after number of appointments not attended?	Click box if the daily recurring appointment ends if set number of appointment Status are marked as **No Show** or **Not Kept Appointment**. **NOTE:** This option only displays if Recurrence Frequency is set to **Daily**.
End after number of appointments not attended	Set the maximum number of appointments that can be missed before daily recurrence appointment is removed from schedule. **NOTE:** This option is only available if the field **Use end after number of appointments not attended** is checked.
End By	The last day the event will take place.
Appointment Type	**Reserved**
Status	The status of the appointment. Set to **Reserved for Contracting Agency** initially. **NOTE:** The status can be changed later to denote whether an appointment was kept or rescheduled.
Start Date	The date of the appointment or first appointment for recurrences.
Start Time	When the appointment starts. **NOTE: AM/PM** can be clicked and changed to denote morning of afternoon appointments.
End Date	Set to match the start date of the appointment. **NOTE:** If the appointment is over several days in a row (i.e. vacation) set End Date to match when the event ends.
End Time	When the appointment ends. **NOTE: AM/PM** can be clicked and changed to denote morning of afternoon appointments.
Description	Description and/or notes regarding the appointment.
Schedule Event Type	The type of event taking place.
Staff	This is set to the user automatically.
Contracting Agency	Set the contracting agency.
Modality	Identify the modality associated with the event being scheduled.

Save becomes selectable after all required fields are completed. Click **Save** to add the appointment to the calendar.

5.1.3. Scheduled Client

For clinician appointments with clients, select this appointment type.

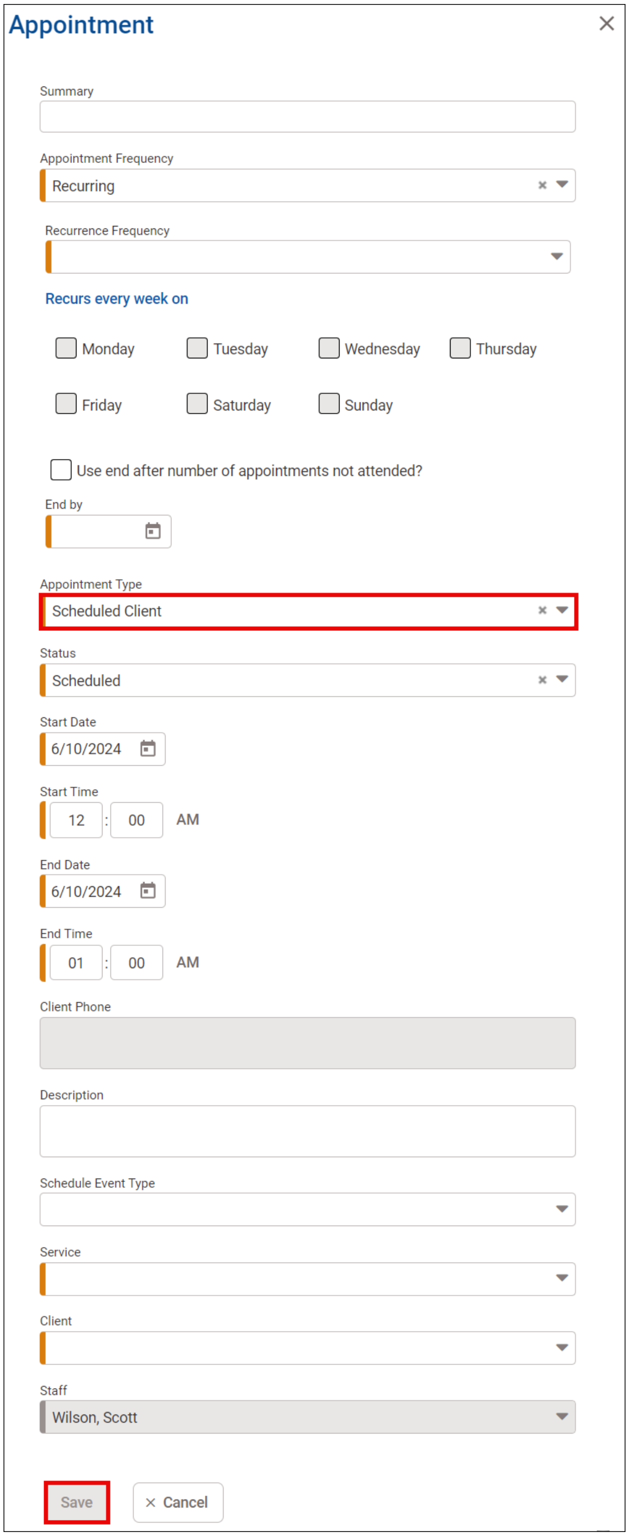


Figure 19: Appointment Type - Scheduled Client

See the table below for completing the Appointment fields.

Table 6: Appointment Type - Scheduled Client

Field	Description
Summary	A brief description of the appointment.
Appointment Frequency	• **Single** – The appointment only occurs once. • **Recurring** – The appointment will occur multiple times.
Recurrence Frequency	How often the appointment recurs. **NOTE:** This field only shows if Appointment is set to **Recurring**.
Recurs Every Week On	Identify which days of the week does the event take place. **NOTE:** This option is only available for Recurrence Frequency – **Weekly**.
Use end after number of appointments not attended?	Click box if the daily recurring appointment ends if set number of appointment Status are marked as **No Show** or **Not Kept Appointment**. **NOTE:** This option only displays if Recurrence Frequency is set to **Daily**.
End after number of appointments not attended	Set the maximum number of appointments that can be missed before daily recurrence appointment is removed from schedule. **NOTE:** This option is only available if the field **Use end after number of appointments not attended** is checked.
End By	The last day the event will take place.
Appointment Type	**Scheduled Client**
Status	The status of the appointment. Set to **Scheduled** initially. **NOTE:** The status can be changed later to denote whether an appointment was kept or rescheduled.
Start Date	The date of the appointment or first appointment for recurrences.
Start Time	When the appointment starts. **NOTE: AM/PM** can be clicked and changed to denote morning of afternoon appointments.
End Date	Set to match the start date of the appointment. **NOTE:** If the appointment is over several days in a row (vacation) set End Date to match when the event ends.
End Time	When the appointment ends. **NOTE: AM/PM** can be clicked and changed to denote morning of afternoon appointments.
Client Phone	This information is auto populated once the client is selected.
Description	Description and/or notes regarding the appointment.
Schedule Event Type	The type of event taking place.
Service	The service being performed/discussed during the appointment.
Client	The name of the client.
Staff	This is set to the user automatically.

Save becomes selectable after all required fields are completed. Click **Save** to add the appointment to the calendar.

5.1.4. Scheduled Group

This appointment type is used to add group events to the user's calendar.

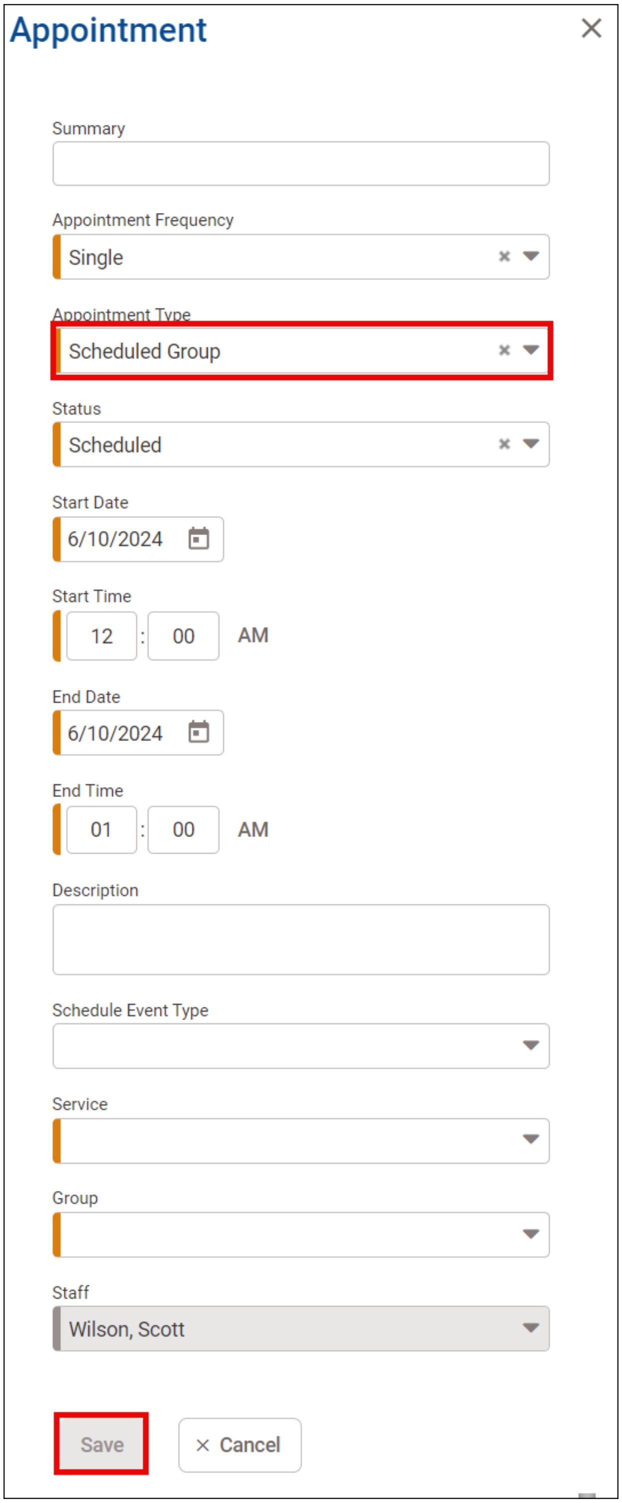


Figure 20: Appointment Type - Scheduled Group

See the table below for completing the Appointment fields.

Table 7: Appointment Type - Scheduled Group

Field	Description
Summary	A brief description of the appointment.
Appointment Frequency	• **Single** – The appointment only occurs once. • **Recurring** – The appointment will occur multiple times.
Recurrence Frequency	How often the appointment recurs. **NOTE:** This field only shows if Appointment is set to **Recurring**.
Recurs Every Week On	Identify which days of the week does the event take place. **NOTE:** This option is only available for Recurrence Frequency – **Weekly**.
Use end after number of appointments not attended?	Click box if the daily recurring appointment ends if set number of appointment Status are marked as **No Show** or **Not Kept Appointment**. **NOTE:** This option only displays if Recurrence Frequency is set to **Daily**.
End after number of appointments not attended	Set the maximum number of appointments that can be missed before daily recurrence appointment is removed from schedule. **NOTE:** This option is only available if **Use end after number of appointments not attended** is checked.
End By	The last day the event will take place.
Appointment Type	**Scheduled Group**
Status	The status of the appointment. Set to **Scheduled** initially. **NOTE:** The status can be changed later to denote whether an appointment was kept or rescheduled.
Start Date	The date of the appointment or first appointment for recurrences.
Start Time	When the appointment starts. **NOTE: AM/PM** can be clicked and changed to denote morning of afternoon appointments.
End Date	Set to match the start date of the appointment. **NOTE:** If the appointment is over several days in a row (i.e. vacation) set End Date to match when the event ends.
End Time	When the appointment ends. **NOTE: AM/PM** can be clicked and changed to denote morning of afternoon appointments.
Description	Description and/or notes regarding the appointment.
Schedule Event Type	The type of event taking place.
Service	The service being performed/discussed during the appointment.
Group	The name of the group. **NOTE:** The group must be created before it can be selected here. See WITS Treatment End User Guide for more information.
Staff	This is set to the user automatically.

Save becomes selectable after all required fields are completed. Click **Save** to add the appointment to the calendar.

5.2. Scheduler – Alternate View

After an appointment is created or edited, the user has access to an alternate scheduler view. This view is only accessible by adding or editing an appointment. It can also be accessed by clicking the “**X**” in the top right of any appointment creation window.

NOTE: Clicking **Review** to edit an appointment and then clicking **Cancel** in the Appointment window will also allow the user to access the alternate scheduler view.

This alternate view allows the user to do the following:

1. Add an appointment to the Scheduler or edit an existing appointment.
2. Select the day and month to show appointments for the selected date.
3. Show appointments for the day/week/month based on the selected date.
4. Manage which staff member’s appointments display on the calendar.
    a. **NOTE:** This option is only available to administers.
5. Change the time intervals for each hour. For example: 10, 15, 20, 30, or 60 minute intervals.

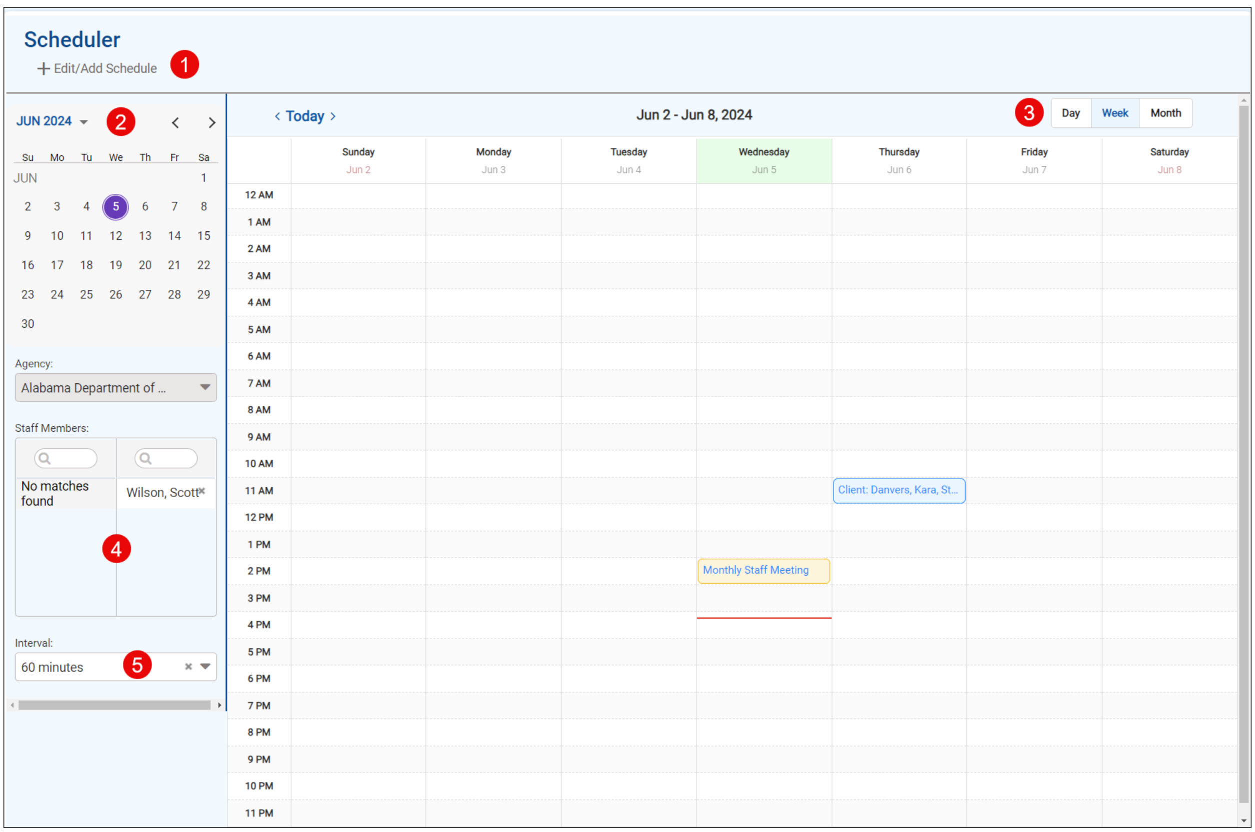


Figure 21: Scheduler - Alternate View

The calendar provides the following information and functionality.

1. The current day will be highlighted in green.
2. The current time will show as a red bar on the calendar.
3. Appointments are color coded.
    a. Blue for Client appointments.
    b. Yellow for Normal appointments.
4. Click on an appointment to display the option to edit or delete an appointment.
    a. For more information on editing appointments, see Edit Appointment.

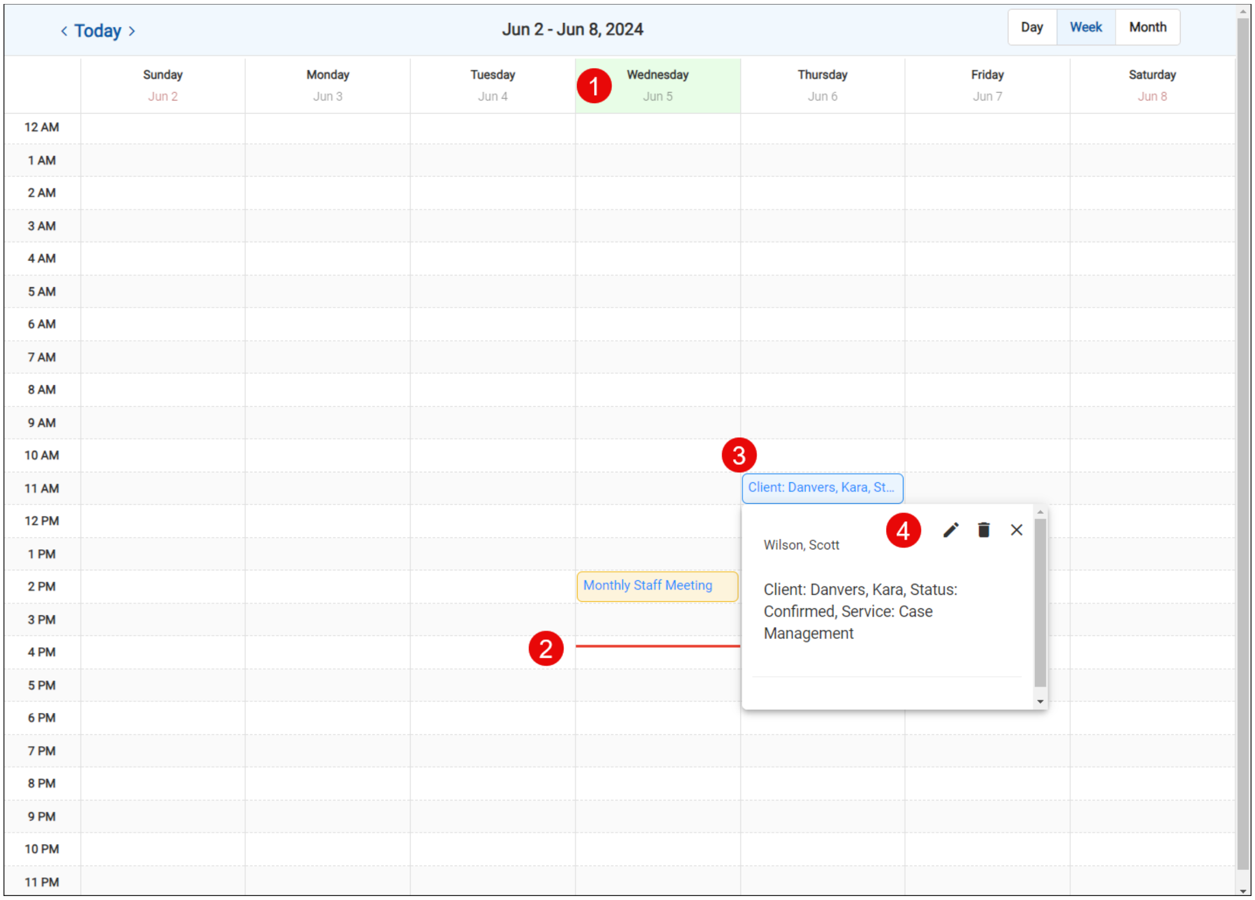


Figure 22: Calendar

5.3. Filter Scheduler

As appointments are added to the Scheduler, the user's Dashboard will update to show these appointments.

To limit the appointments showing, set the **Start Date** and **End Date** fields and then click **Refresh**.

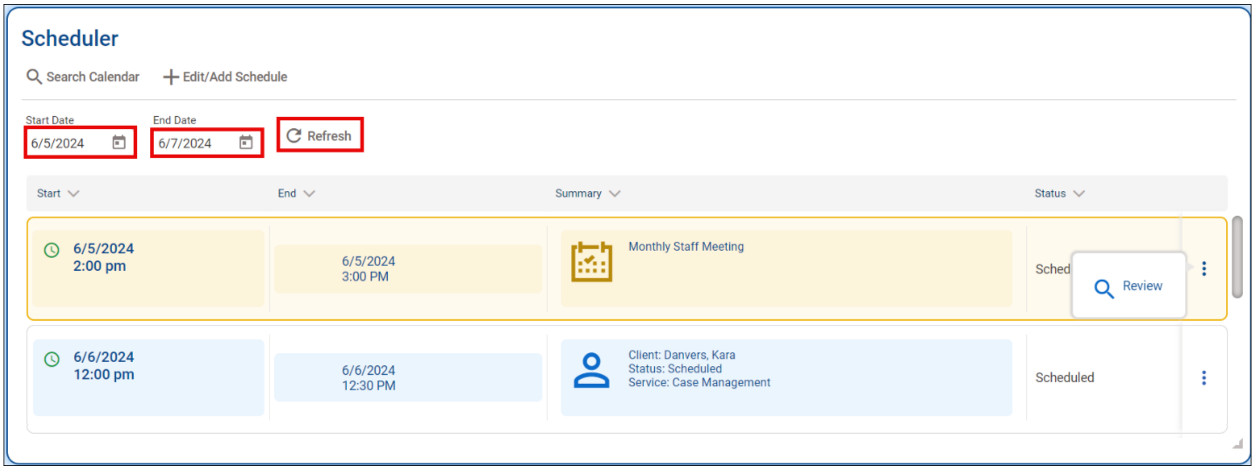


Figure 23: Scheduler with Appointments

5.4. Edit Appointment

To edit an existing appointment, click on the **vertical ellipsis** to the right of the appointment, and then click **Review**.

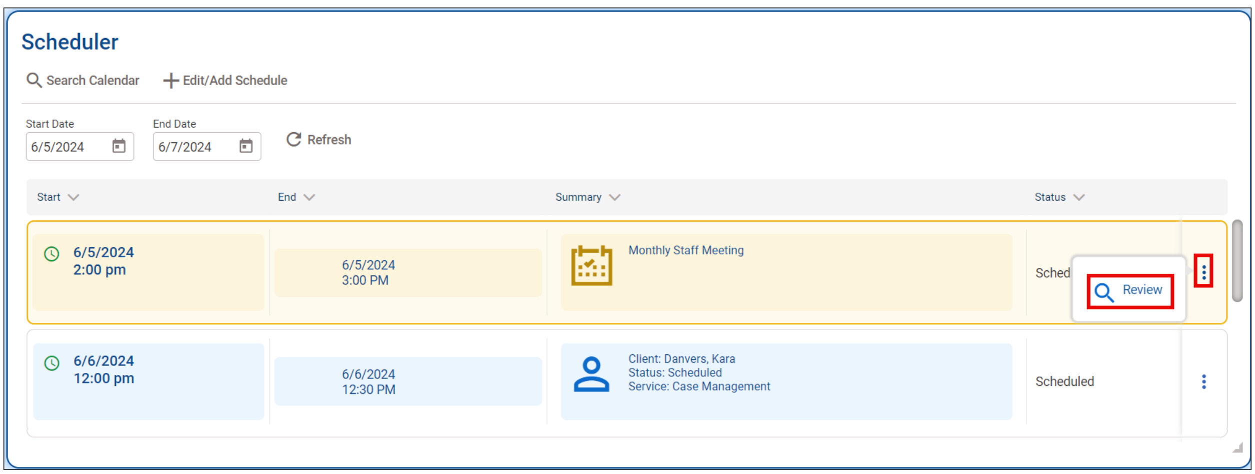


Figure 24: Review Appointment

The Appointment window will open. Here, the appointment can be edited. For example, changing the status of the appointment to reflect whether a client attended or not. Click **Save** after making changes.

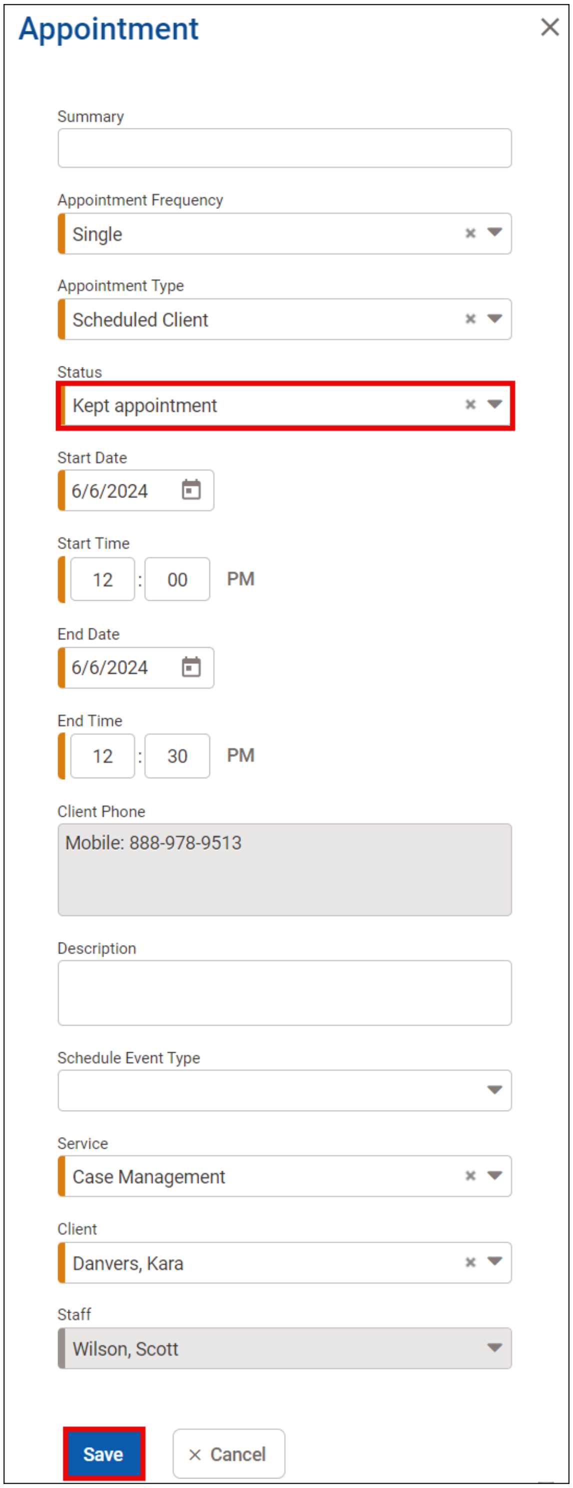


Figure 25: Edit Appointment

5.5. Create Encounter

Users can create encounters directly from their scheduled appointments. To use this feature, the following conditions must be met.

- The user must have the role Create Scheduler Encounter assigned to their account.
- The appointment's start time must be in the past.

Under the Scheduler, locate the appointment. Hover over the vertical ellipsis to the right of the appointment and click **Create Encounter**.

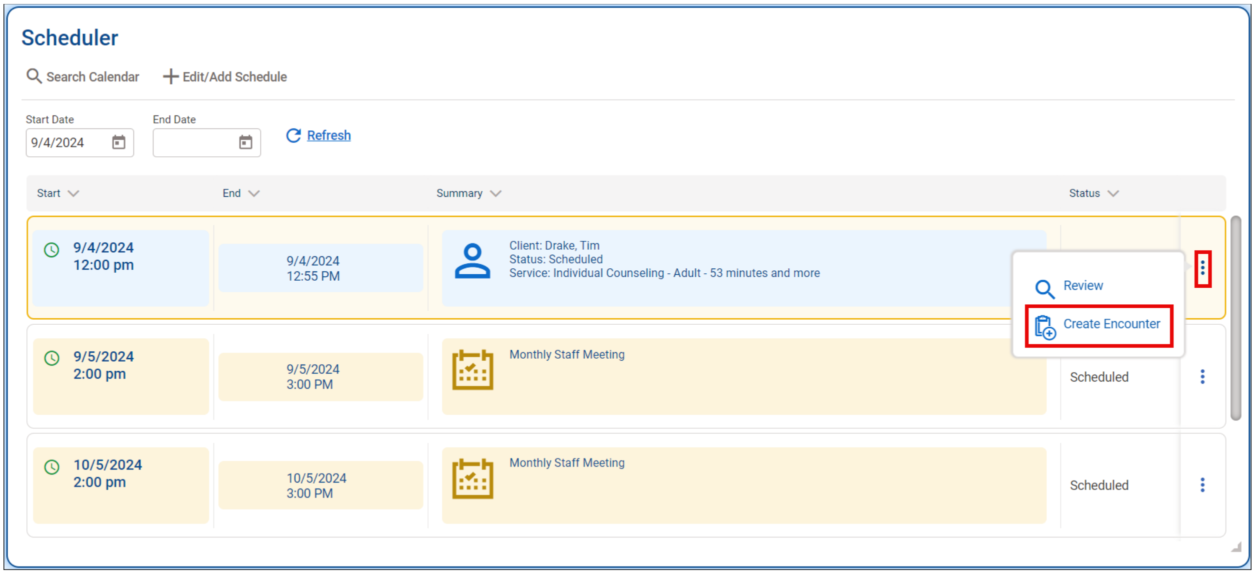


Figure 26: Create Encounter

For more information on creating encounters see *WITS Treatment End User* or *WITS Billing End User* guides.

5.6. Search Calendar

The Search Calendar function is a great way to locate and confirm or delete client appointments.

To search the calendar for a client appointment, click **Search Calendar** under the Scheduler.

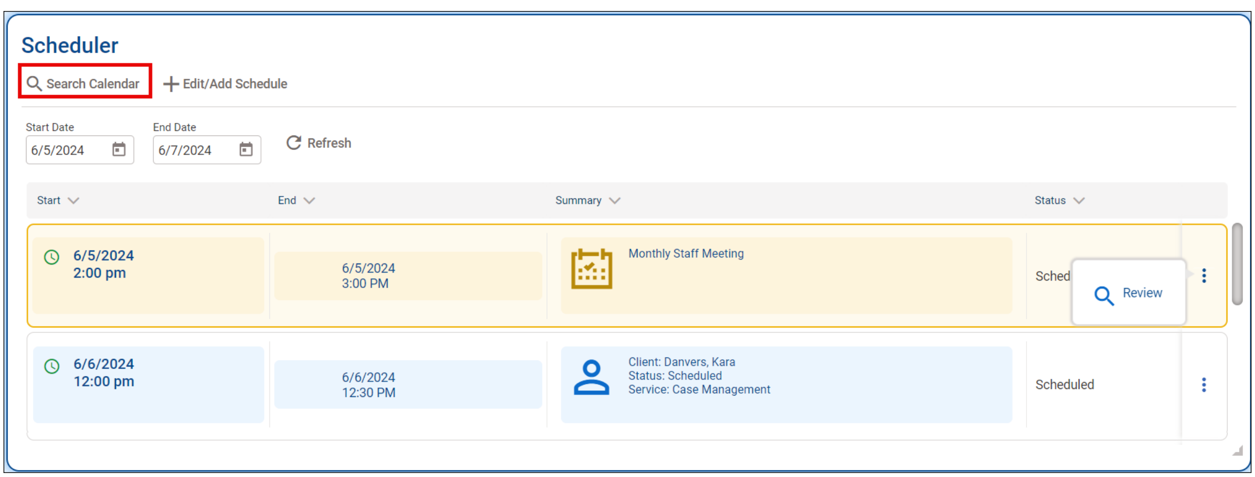


Figure 27: Search Calendar

The Appointment Search screen will display. At a minimum, complete the client name fields and then click **Search**.

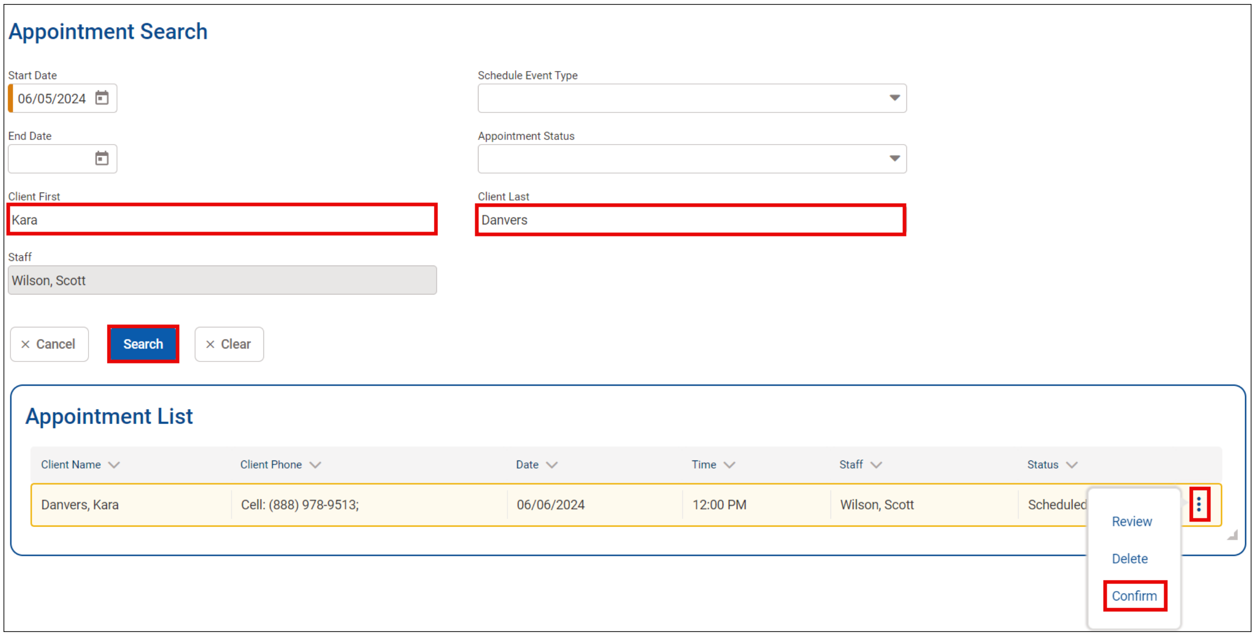


Figure 28: Client Appointment Search Screen

5.6.1. Confirm Appointment

To confirm the appointment, click the **vertical ellipsis** to the right of the client record and then click **Confirm**.

A confirmation screen will display. Click **Yes**.

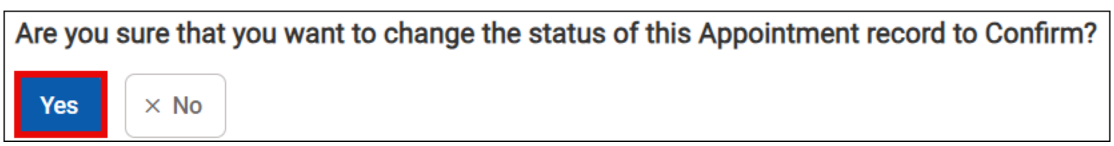


Figure 29: Confirm Appointment

The status of the appointment will change to Confirmed.

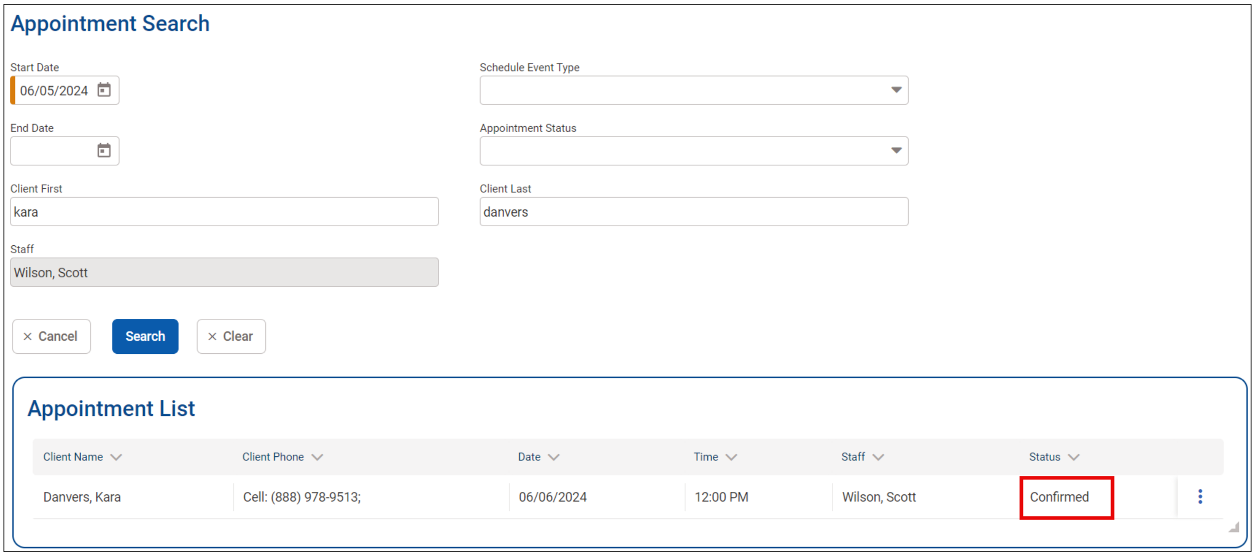


Figure 30: Appointment Confirmed

5.6.2. Delete an Appointment

To delete an appointment, use the Appointment Search screen to locate the appointment. To the right of the appointment, hover over the vertical ellipsis and click **Delete**.

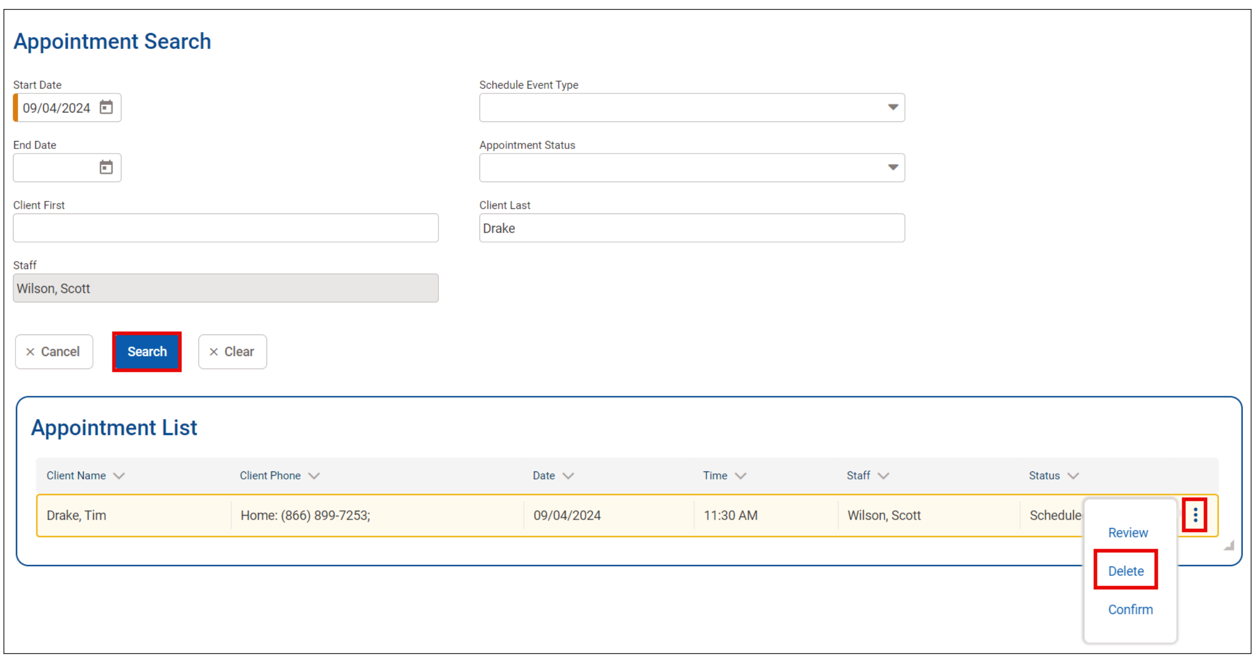


Figure 31: Deleting an Appointment

A confirmation screen will display. Click **Yes**.

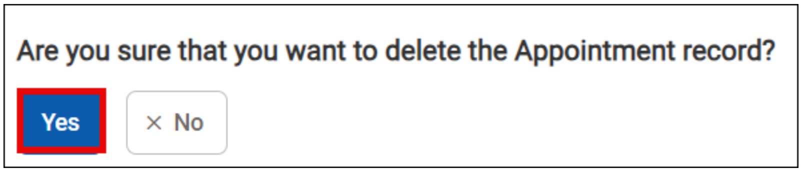


Figure 32: Confirm Appointment Deletion

The appointment will be removed from the Scheduler.

5.6.3. Create Encounter from Appointment Search

Encounters can also be created from appointments on the Appointment Search screen.

NOTE: For appointments with a status of Complete, the encounter can only be created from this screen.

Use Search to locate the appointment. Hover over the **vertical ellipsis** to the right of the appointment and click **Create Encounter**.

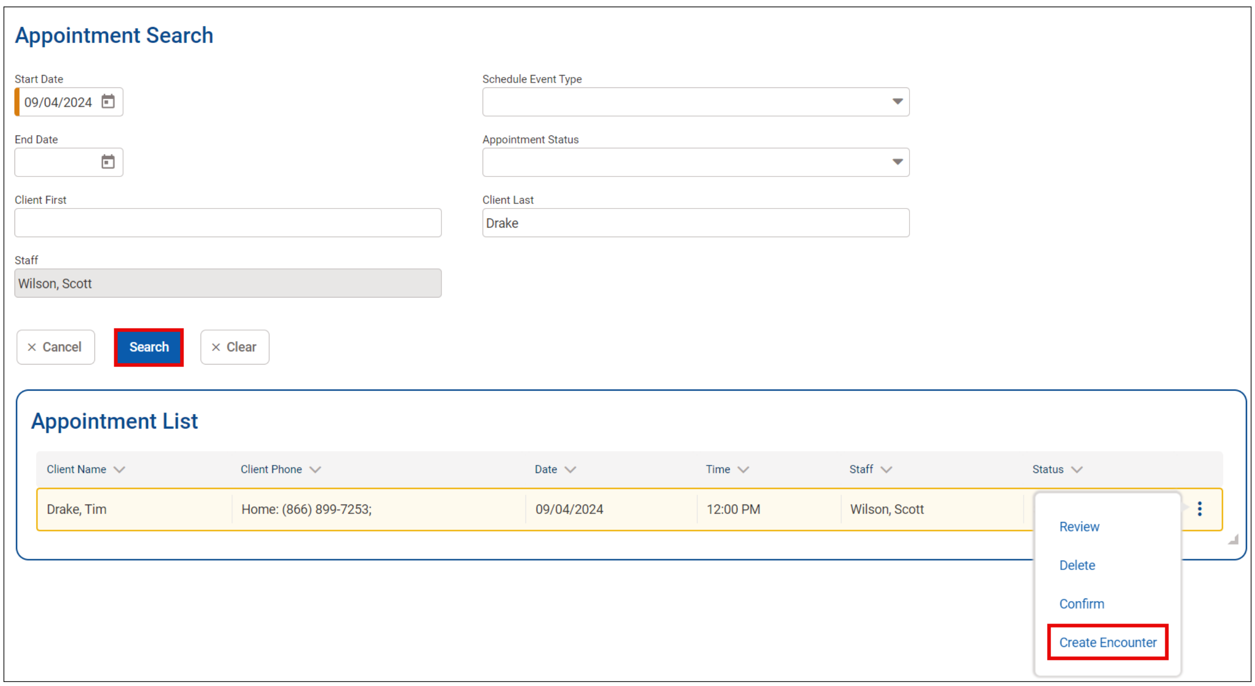


Figure 33: Create Encounter from Appointment Search

For more information on creating encounters see *WITS Treatment End User* or *WITS Billing End User* guides.

6. GENERAL FUNCTIONALITY

Some common functions for all WITS users are covered below.

6.1. Search

When the user accesses an option from the left navigation menu, they will usually need to perform a search to locate a record. While the fields available for a search may differ, the layout is the same for all search screens.

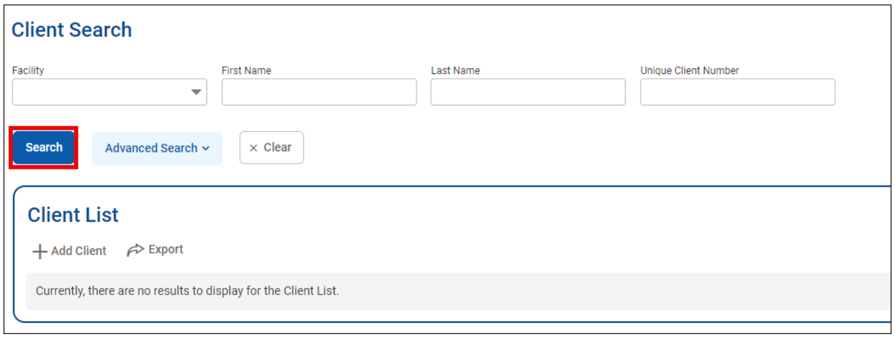


Figure 34: Search

By default, a basic search screen will display allowing the user to enter minimal criteria to locate the record in question. Once the search parameters are entered, click **Search**.

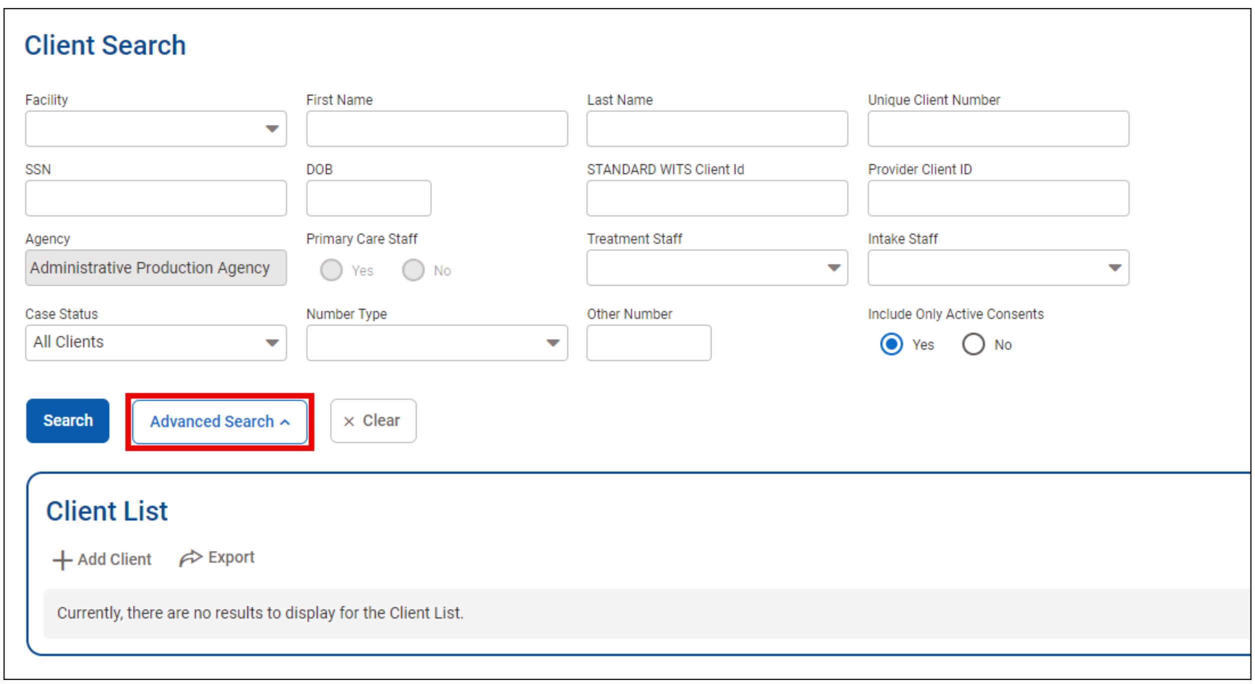


Figure 35: Advanced Search

In some instances, the user may need to include specific search parameters to locate a record. In those cases, click **Advanced Search** to display more search options.

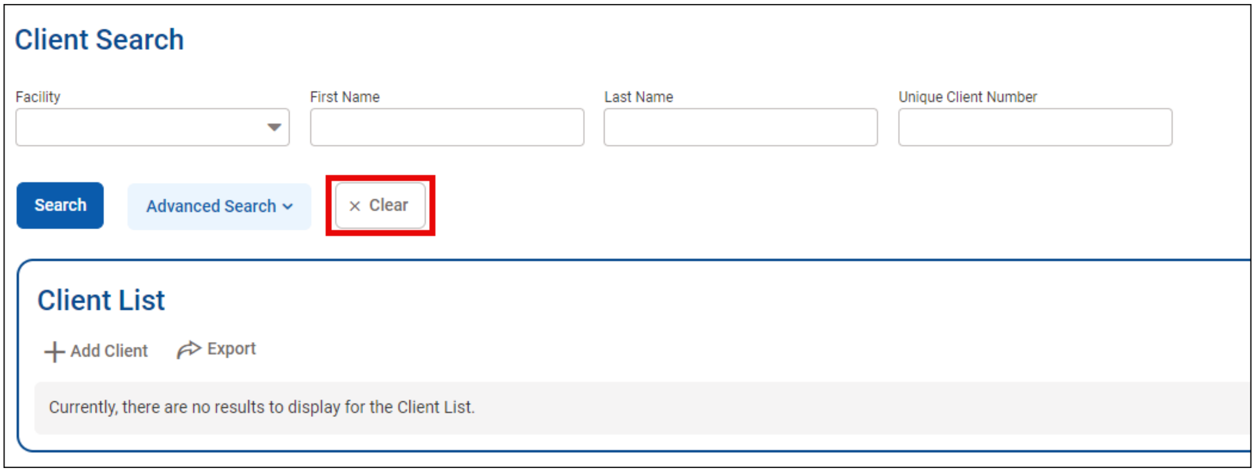


Figure 36: Clear Search

To clear the search fields, click **Clear**.

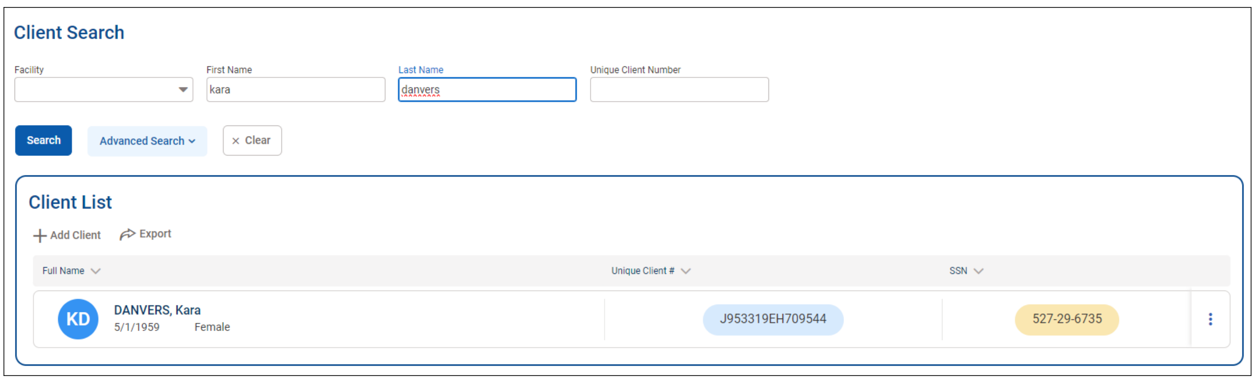


Figure 37: Search List

When the user performs their search, the results will display below in the **List** section.

6.1.1. Wildcards and Operators

When a search is performed, WITS looks for records that exactly match the search criteria. However, there may be times when a user needs to perform a search using partial data in a field. For example, locating client when unsure of the spelling of the first name. This is done by using a wildcard.

A wildcard is the asterisk (*). It can be placed before and/or after search criteria in a field.

- Placing the * before the search criteria will search for any records that end with the entered search criteria.

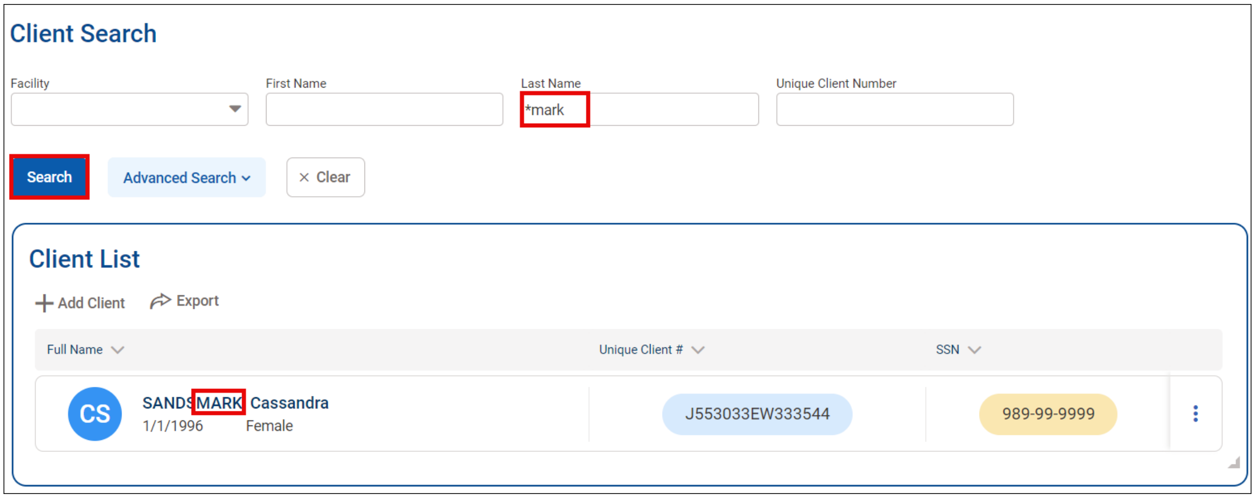


Figure 38: Wildcard Before Search Criteria

- Placing the * after the search criteria will search for any records that begin with the entered search criteria.

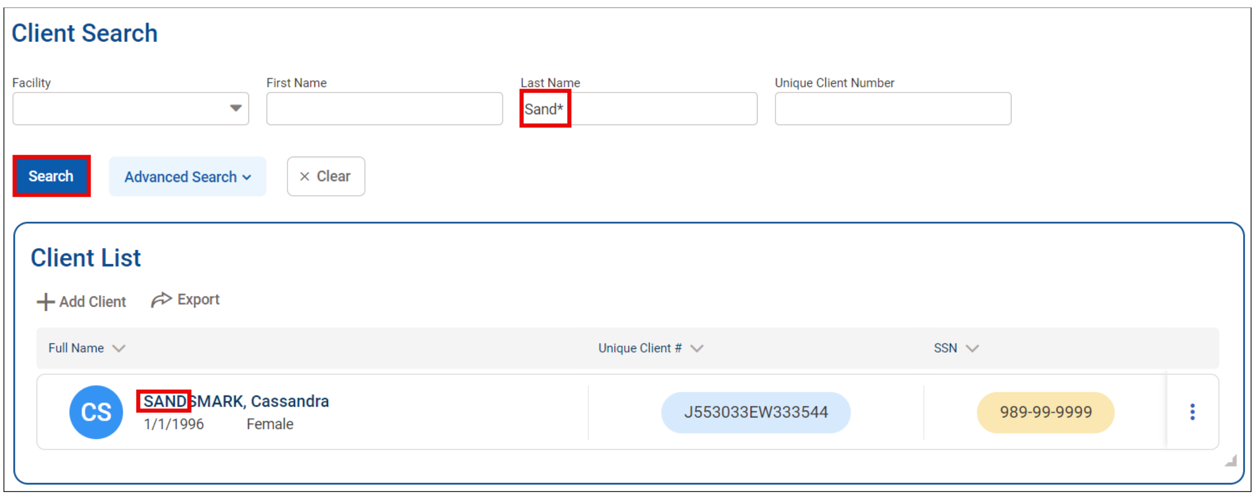


Figure 39: Wildcard After Search Criteria

- Placing the * before and after the search criteria will search for any records that contain the entered search criteria.

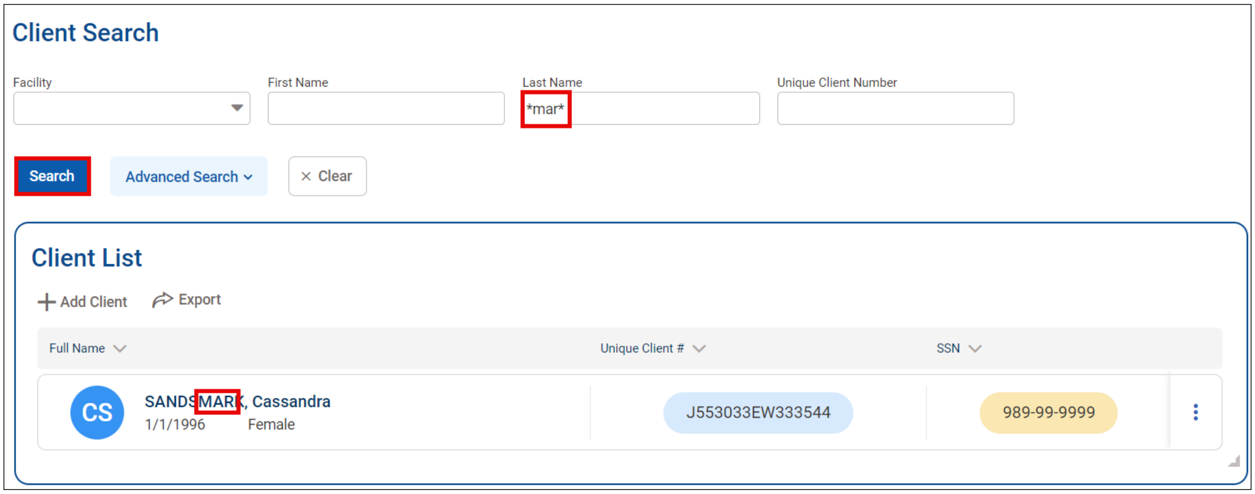


Figure 40: Wildcard Before and After Search Criteria

For search fields looking for numerical data, such as a date or encounter balance, operators can be included in the search fields. Except for one, all operators are placed before the search criteria. Refer to the table below for information on the operators and how to use them.

Table 8: Operators

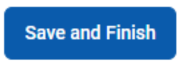
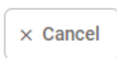
Operator	Description
<	This operator looks for data with a value less than and before the search criteria. • <100 – Looks for data less than 100 • <1/1/2000 – Looks for data before the date 1/1/2000
<=	This operator looks for data with a value less than or equal to and on or before the search criteria. • <=100 – Look for data 100 or less • <=1/1/2000 – Looks for data on or before the date 1/1/2000
>	This operator looks for data with a value greater than and after the search criteria. • >100 – Looks for data greater than 100 • >1/1/2000 – Looks for data after the date 1/1/2000
>=	This operator looks for data with a value greater than or equal to and on or after the search criteria. • <=100 – Look for data 100 or more • <=1/1/2000 – Looks for data on or after the date 1/1/2000
|	This operator is used between two entered search criteria in a field. WITS will perform a search looking for matches to either value entered. • Tim | Timothy – Looks for records containing either name • 3000 | 3500 – Looks for records containing either amount

	• 1/1/2000 | 1/1/2010 – Looks for records containing either date.

6.2. Common Navigation Buttons

Users will come across some common buttons to help navigate the system. The table below lists those buttons and how they are used.

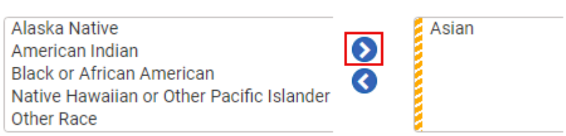
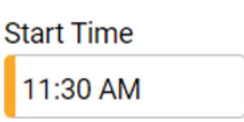
Table 9: Navigation Buttons

Button	Description
	If the user needs to save entered data, but they are not ready to finalize and submit a form, select this option to save what was entered.
	If the user has finished completing a form, and they are ready to submit it, this option is selected. Once selected, the form will no longer be editable.
	If the user needs to navigate away from a form without saving, they must click **Cancel**, first. If they try to leave a form without selecting this, they will receive an error message regarding unsaved data.
	The vertical ellipsis will display to the right of search results. Selecting this will allow the user to quickly access certain functions or areas of the record.

6.3. Special Fields

As users navigate WITS, they will come across some special fields. The table below identifies the different fields they may come across and what the fields mean.

Table 10: Special Fields

Field	Description
	Fields with an orange bar to the right of them denote required fields. These must be completed before you perform the desired action or save/submit a form.
	If the field has a broken orange line, it is a required field. However, it does not need to be completed before saving data to a form. It will need to be completed before a form can be submitted.
	Some fields will require the user to move data from one box to the other. To do this, click on the data to be moved, and select the right arrow to move it to the box on the right. The reverse can be done to undo data that has been moved.
	The time can be entered in 12 hour or 24 hour increments in those field requiring the user to enter a time If entering time in 12 hour increments, add AM or PM after the time. Time entered in 24 hour increments will automatically convert to 12 hour increments after the user leaves the field.

6.4. Change Credentials

Every 60 days, the user is required to change their password and PIN. To do this, follow these instructions:

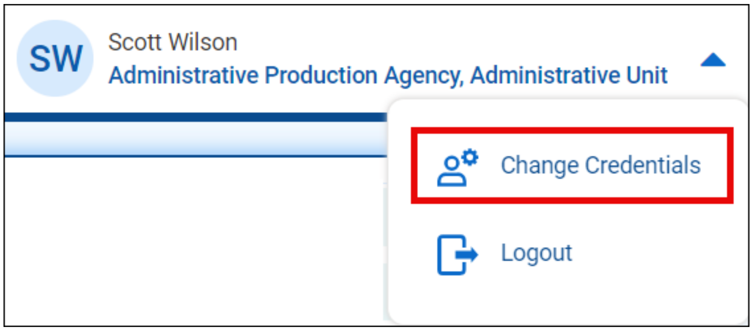


Figure 41: Change Credentials Button

1. To the right of the user's name, hover over the down arrow. It will expand, as shown above, to display **Change Credentials**.
2. Click Change Credentials.

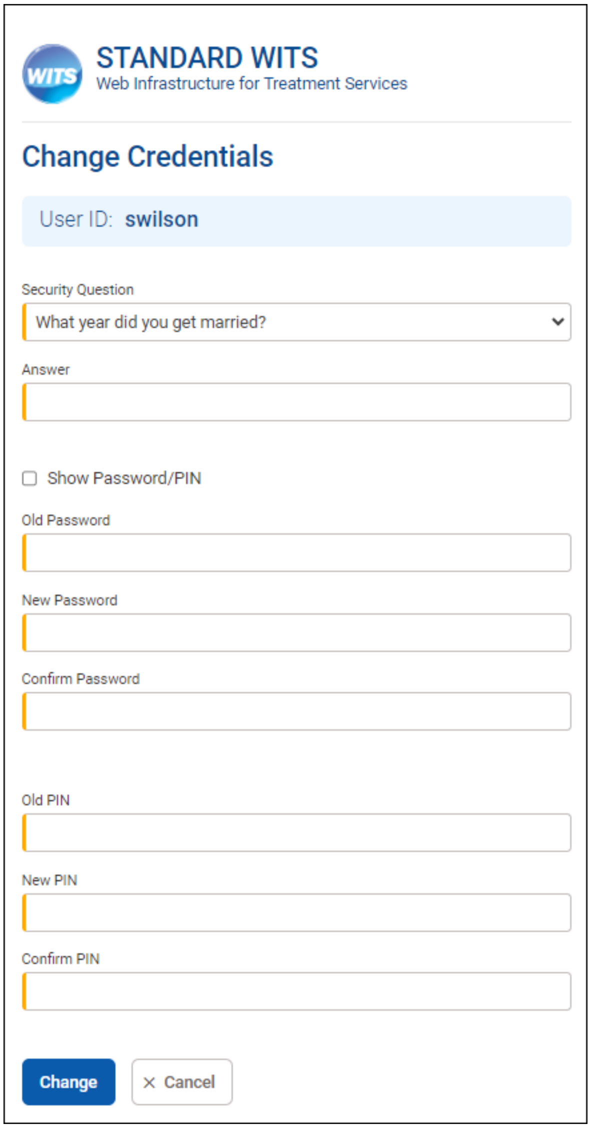


Figure 42: Change Credentials Screen

3. Complete all required fields.
    a. The user will have to enter their old password and PIN as well as the new ones.
    b. The user can check the box **Show Password/PIN** to display what they typed in those fields.
4. Once all fields have been completed, click **Change**.

6.5. Logging Out

Closing the browser tab for WITS does not log the user out of the application. To log out of WITS, the user will need to select the log out option.

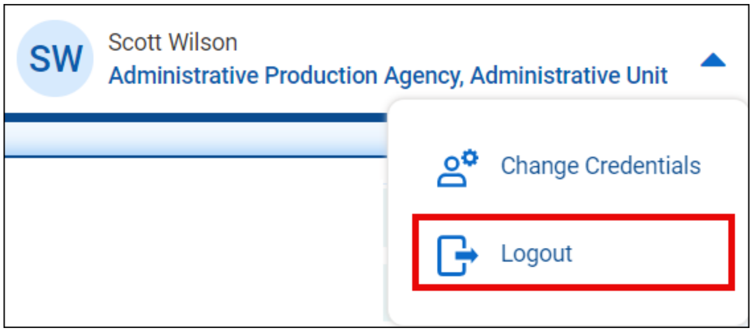


Figure 43: Logout

1. Hover over the arrow to the right of the user's name to display **Logout**.
2. The Logout screen will display asking "Are you sure you want to log out?"
3. Click **Yes**.

6.6. Change Agency and/or Facility

If the user has access to more than one agency and/or facility, they may need to navigate between them to complete their job functions. The steps below allow for easy navigation between multiple agencies and/or facilities.

1. Below their name, the user will click on the hyperlink for their agency and facility.

Figure 44: Agency/Facility Hyperlink

2. This will display the **Change Facility** screen.

Figure 45: Change Facility

3. Choose the **New Agency** if the agency is being changed.
4. Choose the **New Facility**.
5. Click **Go** to finish switching agency/facility.

6.7. Snapshot

At the top of the screen in the Header Navigation is the option **Snapshot**. Clicking on this will open a read-only version of the current WITS screen. The header, “This window is a read-only copy” shows to identify the read-only screen. Snapshot is useful when the user wants to see two different screens at the same time. For example, a snapshot of the Client Profile screen to reference while entering an assessment.

NOTE: Fields may be selectable in the snapshot, but no changes are saved.

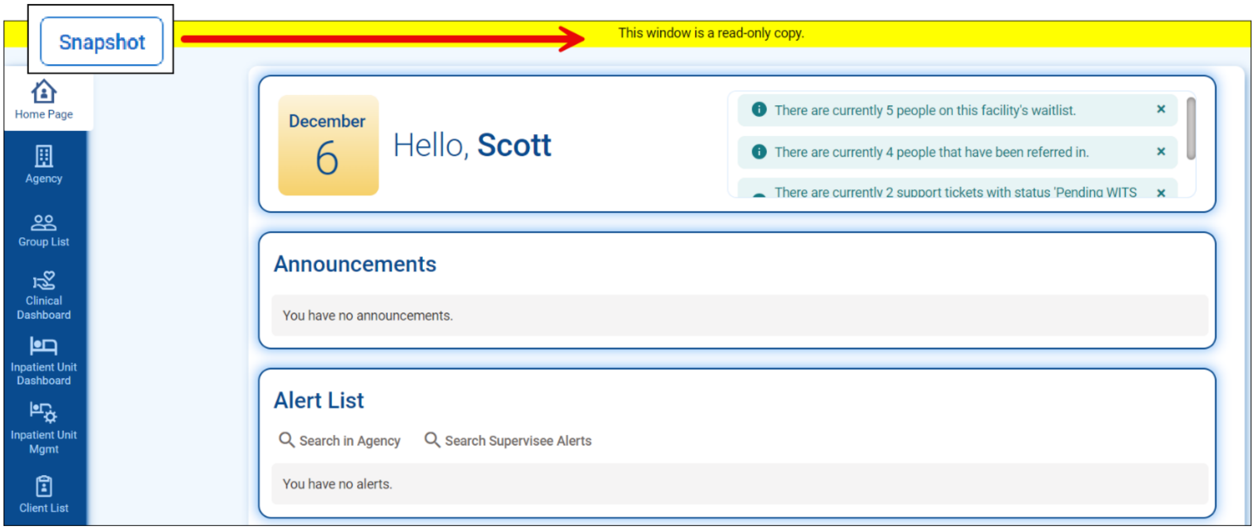


Figure 46: Snapshot

Appendix A: Acronyms

Table 4: Acronyms

Acronym	Literal Translation
ADMH	Alabama Department of Mental Health
ASAIS	Alabama Substance Abuse Information System
ASAM	American Society of Addiction Medicine
FEI	FEI Systems
WITS	Web Infrastructure for Treatment Services

Appendix B: Glossary

Table 5: Glossary

Term	Definition
Agency	The legal entity that a provider operates within; Some people refer to this as 'Provider'.
Credentials	Password and PIN for logging into WITS.
Facility	The location (building) that an Agency/Provider uses to provide services or track Prevention Plans. A provider can have more than one facility.
Modality	A modality is a treatment method, piece of equipment, or intervention strategy that helps patients with injuries or conditions.