# ADMH SAIS

# WITS Treatment Administration User Guide

Version 1.0

Prepared by FEI Systems

Date 2/01/2024

# Table of Contents

## List of Tables



## List of Figures

# Record of Changes

*Table 1: Record of Changes*

| Version Number | Date | Author/Owner | Description of Change |
|---|---|---|---|
| 0.1 | 12/15/2023 | Scott Wilson | Initial Draft |
| 1.0 | 2/29/2024 | Murali Maka | Initial Submission to ADMH |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

# 1. INTRODUCTION

## 1.1. Purpose

This document provides instructions on administrative functions regarding the Treatment workflow. For information on the provider's end-user Treatment workflow, see *WITS Treatment User Guide*.

## 1.2. Audience

The intended audience for this User Guide is any state and provider administrator managing a provider agency offering treatment services.

# 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 the user bookmark the following links for quick access to the WITS environments.

To access the 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 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. TREATMENT WORKFLOW

When a client comes into a treatment facility and requests services, there are multiple steps that must be completed and data that must be captured. To help facilitate step completion and accurate data collection, there is a workflow for navigating the WITS Treatment module.

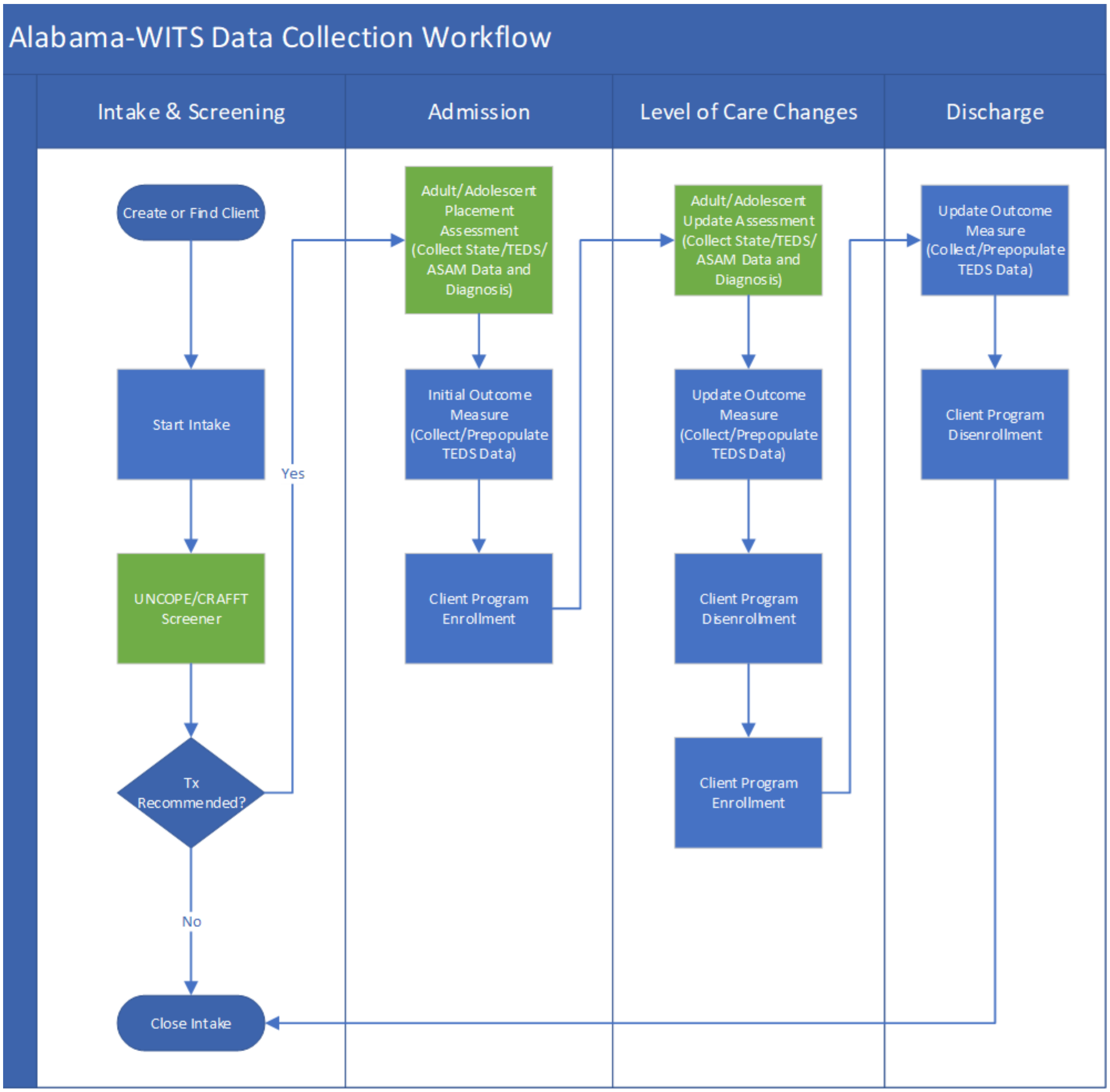



*Figure 1: Treatment Workflow*

This document covers the functions processes that will need to be completed by the state and agency administrators.

As the different screens are navigated in WITS, the user will have the opportunity to capture various data. Some data fields are required and are indicated by the yellow or yellow striped bar on the left side of the field. Fields without these bars are optional to completing the form or workflow. However, it is recommended that the user capture as much data as necessary for complete and accurate reporting.

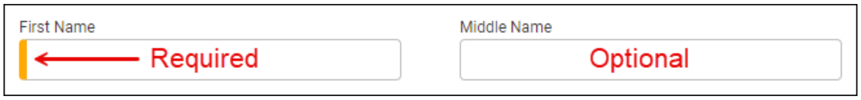



*Figure 2: Required Field vs Optional Field*

# 4. STATE ADMINISTRATION

A state administrator will need to create the provider agency in WITS before a provider can begin managing their agency and associated facilities.

## 4.1. Agency Management

An agency is the provider or contractor organization that will be providing services on behalf of the state.

**NOTE:** All functions regarding provider management and task execution require an agency be created for the provider.

### 4.1.1. Agency Creation

To create an agency:

1. From the left Navigation Menu, click **Agency**.

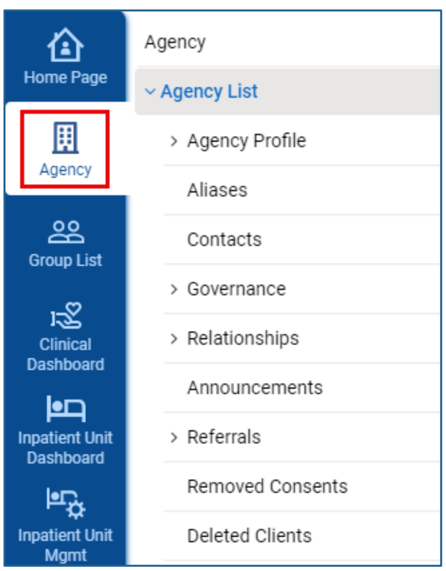



*Figure 3: Agency*

2. The Agency Search screen will display.
    a. The user can perform a search for agencies that belong to the selected Domain.
    b. Agencies will display in the Agency List section.

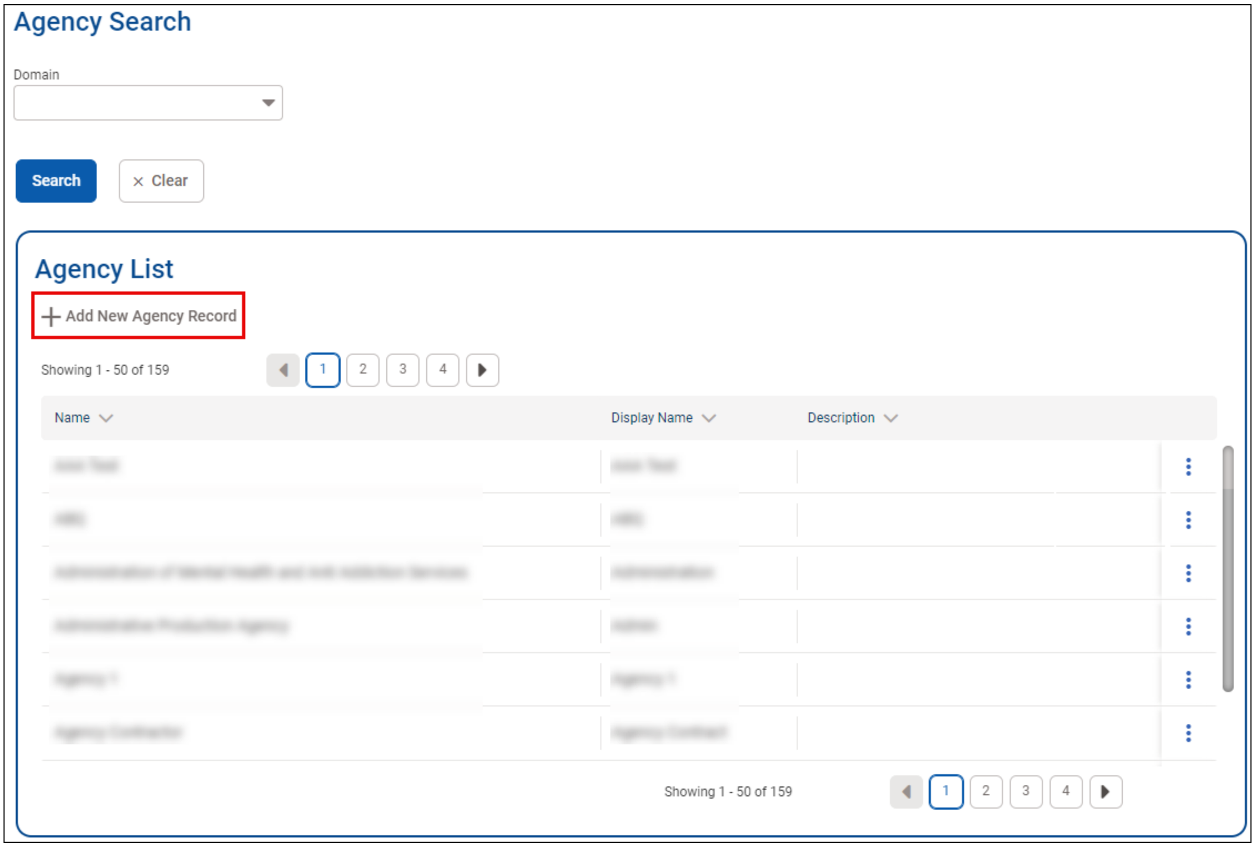



*Figure 4: Add Agency Record*

3. To add a new agency, click **+Add New Agency Record**.

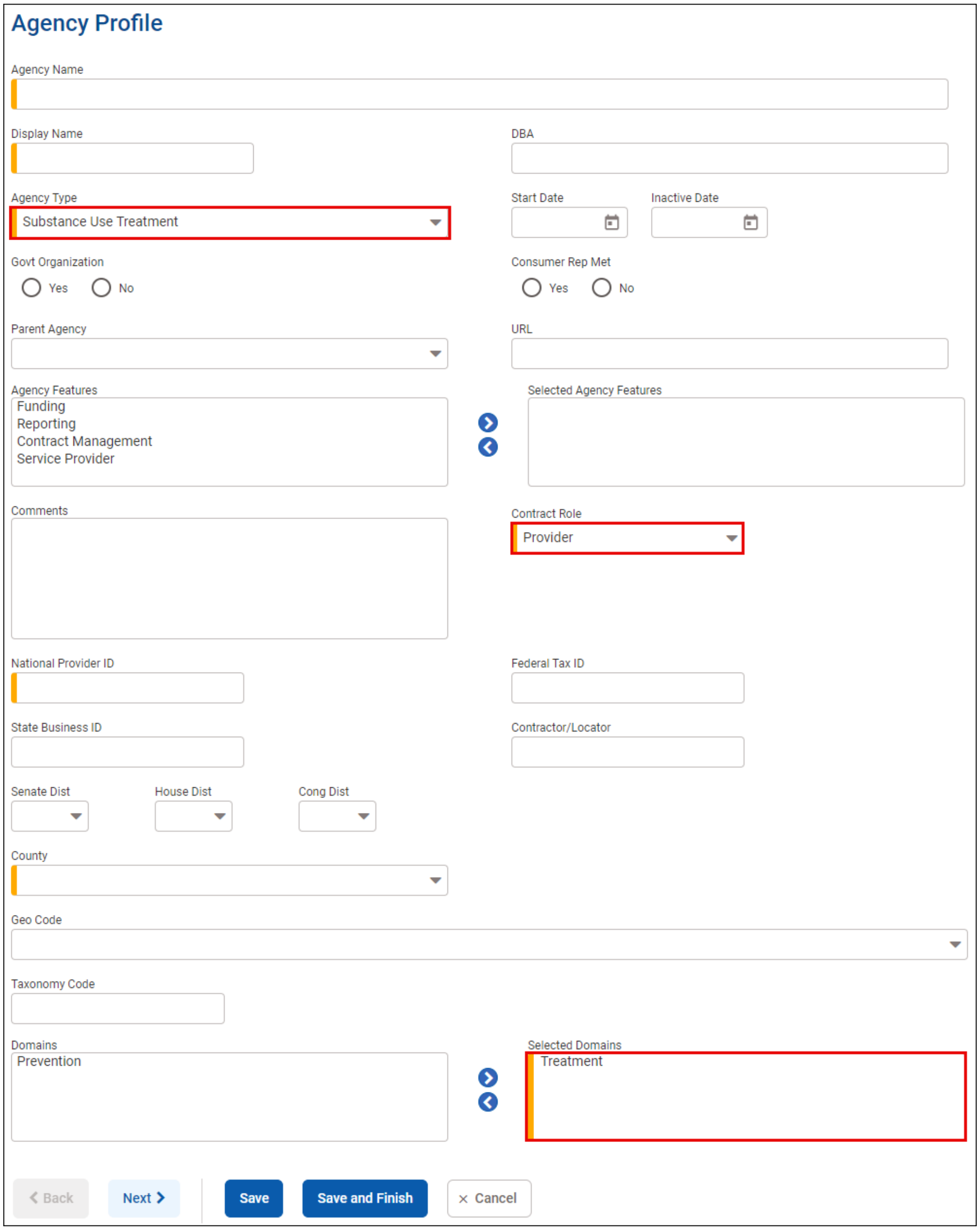



*Figure 5: Agency Profile*

4. The required fields must be completed.
    a. See table *Agency* Profile or more information on fields.
5. Other fields can be completed if the information is available.
    a. The provider's administrator will also be able to complete optional fields as needed.

*Table 2: Agency Profile*

| Field | Description |
|---|---|
| Agency Name | The name of the Agency |
| Display Name | This is the shortened name that will display in dropdowns on other screens. |
| DBA | Doing Business As – This field is populated if the agency is doing business under another name than the legal agency name. |
| Agency Type | The type of service that agency will be performing. For Treatment, this will usually be set to Substance Use Treatment.<br>**NOTE:** Alerts are linked to agency type. So, if other types are used, the alerts will need to be created for each type used. |
| Start Date | When the agency organization was established. |
| Inactive Date | This is set when the agency is no longer is operation. |
| Govt Organization | Denotes whether the agency is a government organization or not. |
| Consumer Rep Met | Can be set if the provider's representative was met by the state agency. |
| Parent Agency | If the agency is a child of another agency, select the parent agency. |
| URL | If the agency has a URL, it can be listed here. |
| Agency Features → Selected Agency Features | Any services offered by the agency can be selected here. |
| Comments | Any text not included in other fields on this screen can be recorded here. |
| Contract Role | This should always be set to Provider. Only state agencies would be set to Contractor. |
| National Provider ID | A 10-digit identifier for healthcare providers that should be provided by the provider. |
| Federal Tax ID | Federal tax identification code assigned to an organization. |
| Vendor # | The vendor number used for STAARS. |
| Contractor/Locator | An information only field to identify any contract-type ID. |
| Senate Dist/House Dist/Cong Dist | The senate, house, and congressional districts where the agency is located. If the agency has multiple locations, then select the county where the home office resides. |
| County | The county where is agency is located. If the agency has multiple locations, then select the county where the home office resides. |
| Geo Code | Geographical data linked to the selected county. |
| Taxonomy Code | This designates an organization's classification and specialization. |
| Domains → Selected Domains | Any service domains the provider offers should be moved over to Selected Domains. For treatment agencies, Treatment must be moved over. |

6. Click **Next**.

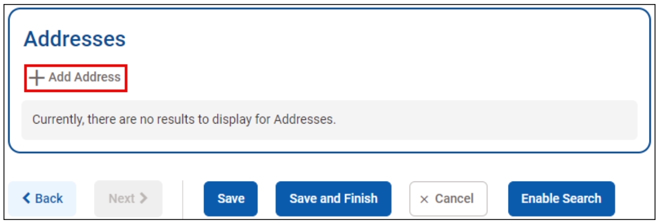



*Figure 6: Add Address*

7. On the Addresses screen, click **+Add Address**.
8. At minimum, complete the required fields.

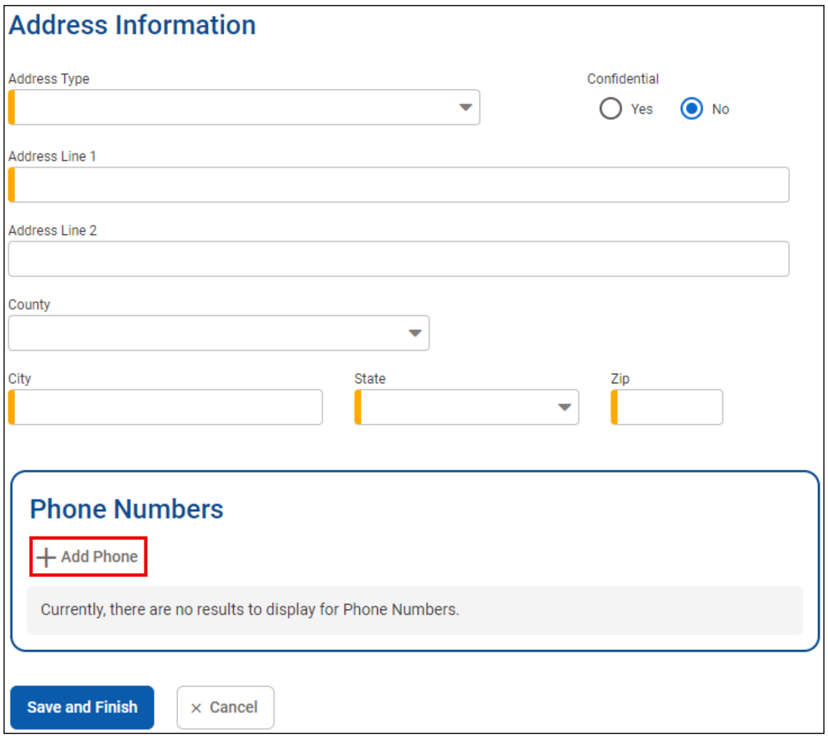



*Figure 7: Address Information*

9. Under Phone Numbers section, click **+Add Phone**.

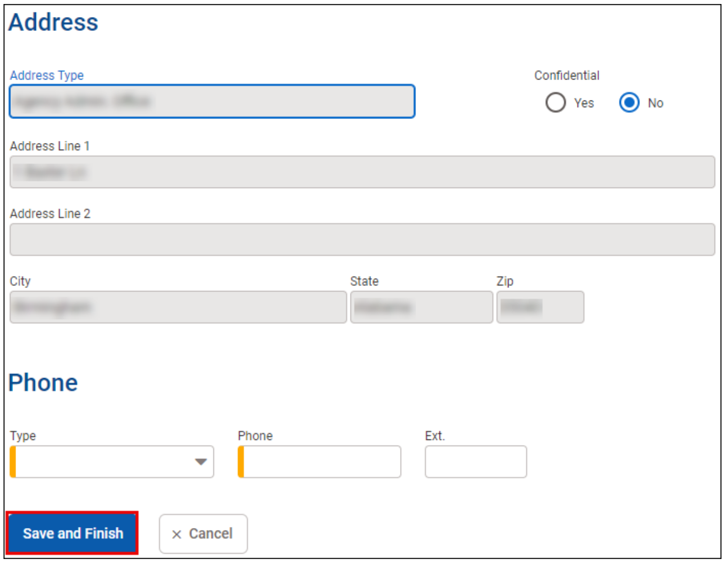



*Figure 8: Phone Information*

10. Enter the phone information and click **Save and Finish**.
11. The user is returned to the Address Information screen.
    a. To edit a phone number, click the **vertical ellipsis** to the right of the phone number.
    b. Click **Review** to make the phone fields editable.
    c. Click **Delete** to remove the phone number.

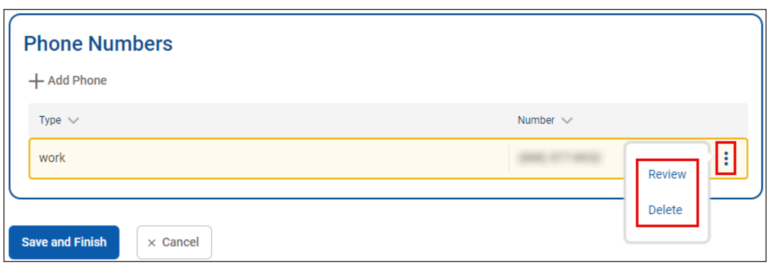



*Figure 9: Edit Phone Number*

12. If more than one phone number needs to be recorded, click **+Add Phone** and repeat steps until all numbers are entered.
13. On the Address Information screen, click **Save and Finish**.
14. The user is returned to the Addresses screen.
    a. To edit an address, click the **vertical ellipsis** to the right of the address.
    b. Click **Review** to return to the Address Information screen.
    c. Click **Delete** to remove the Address.
    d. **Enable Search** – This function is not enabled for Alabama.

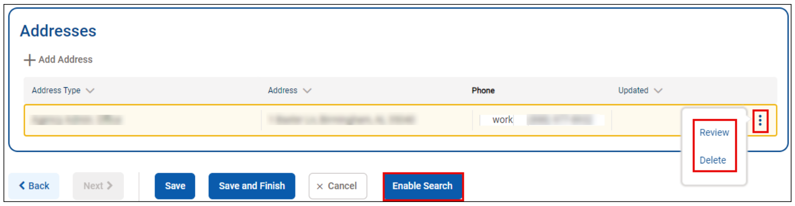



*Figure 10: Edit Addresses*

15. If more than one address needs to be recorded, click **+Add Address** and repeat steps until all addresses are entered.
    a. Each address added will need to have at least one phone number.
16. Once all addresses and phone numbers have been entered, click **Save and Finish**.

The user is returned to the Agency Search screen. However, there are some items to note.

- Under the user's name in the top right corner, the Agency is now set to the agency just created.
- If the user clicks **Agency Profile**, the agency's profile will automatically display without needing to be selected from the Agency Search screen.

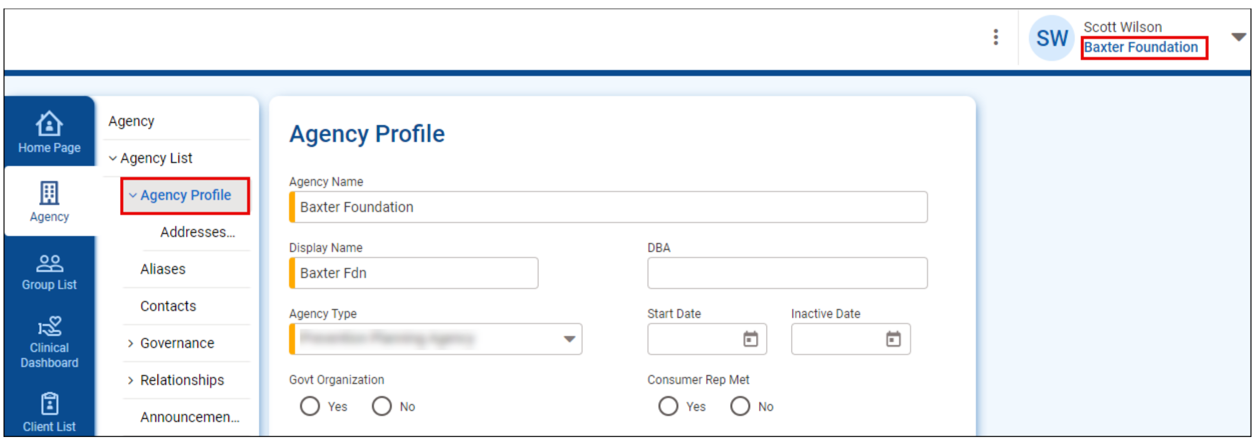



*Figure 11: Set Agency*

## 4.1.2. Agency Navigation

To make changes to an agency and its associated screens, the agency record must be active.

1. From the left Navigation Menu, click **Agency**.
2. The Agency Search screen displays.
3. Locate the agency under Agency List.

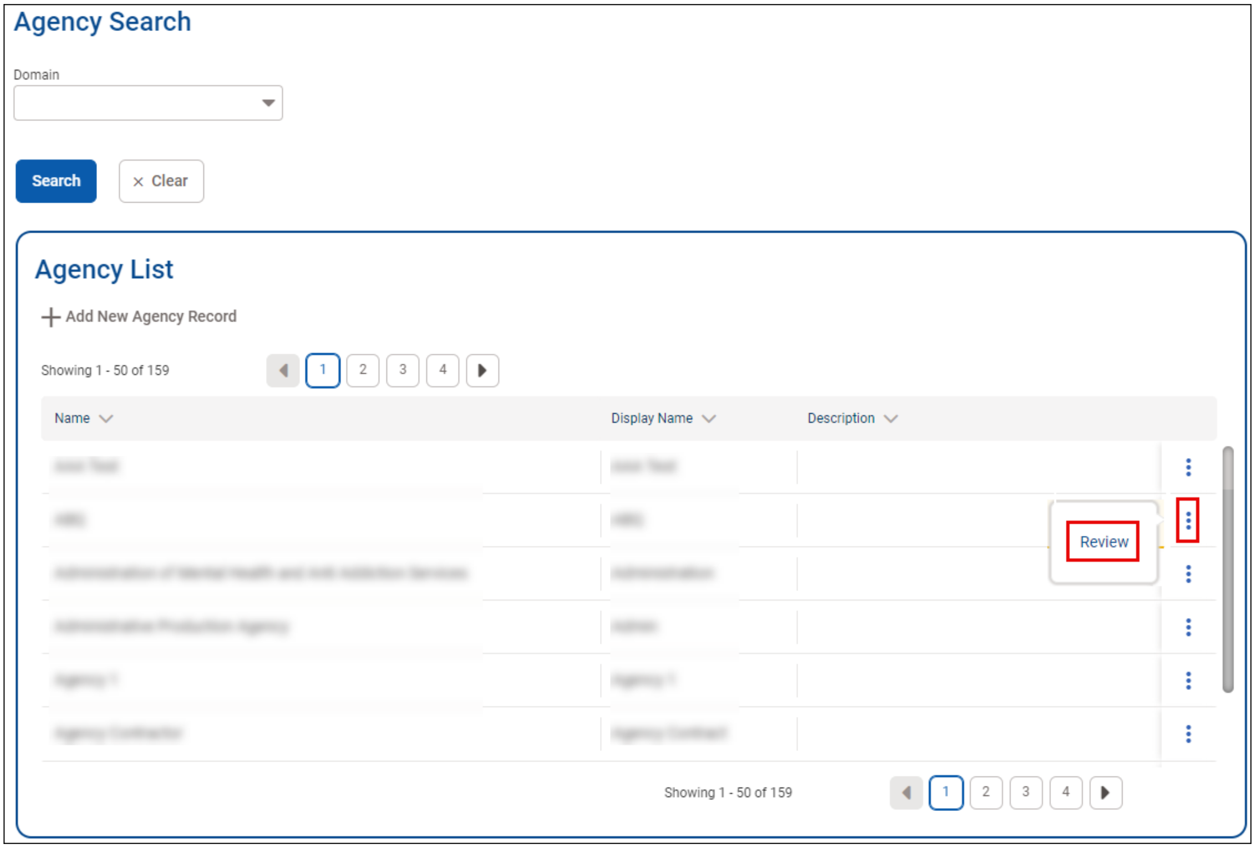



*Figure 12: Accessing an Agency*

4. To the right of the agency, click the **vertical ellipsis** and then click **Review**.
5. The Agency Profile displays.
6. Other sub-menu items related to agency are now available.

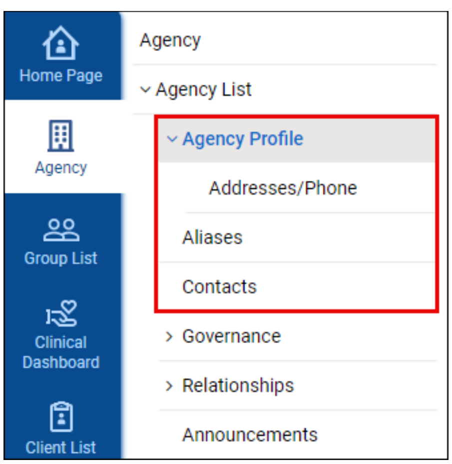



*Figure 13: Agency Sub-Menu Items*

### 4.1.3. Contacts

This process assumes the user had accessed the agency record. Follow the steps below to add a contact to an agency record.

An Electronic Data Interchange (EDI) contact will need to be added for the Alabama Department of Mental Health (ADMH)agency.

For provider agencies, a contact will need to be added for each of the following:

- Providers that upload client records to WITS.
- Providers that upload 837s to WITS.

**NOTE:** A contact cannot be added until at least one staff member has been created for the agency and facility.

1. Under Agency > Agency List, click **Contacts**.

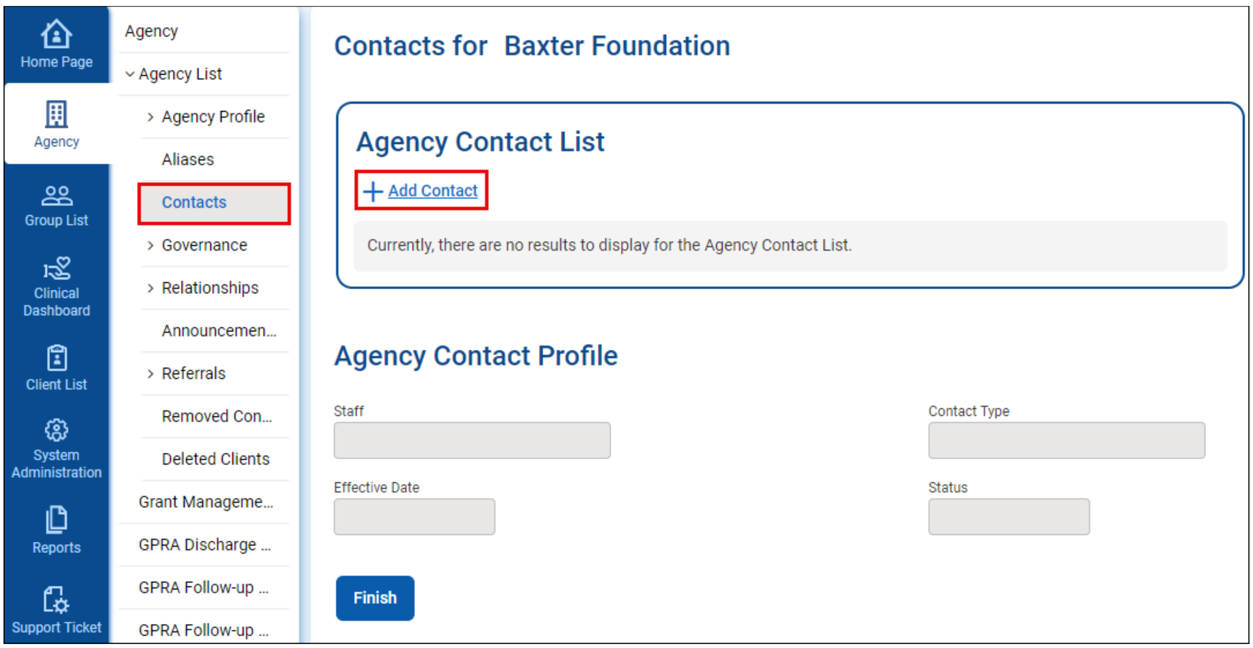



*Figure 14: Contacts*

2. The screen Contacts for <Agency Name> will display.
3. Click **+Add Contact**.
4. Complete all required fields in the Agency Contact Profile.

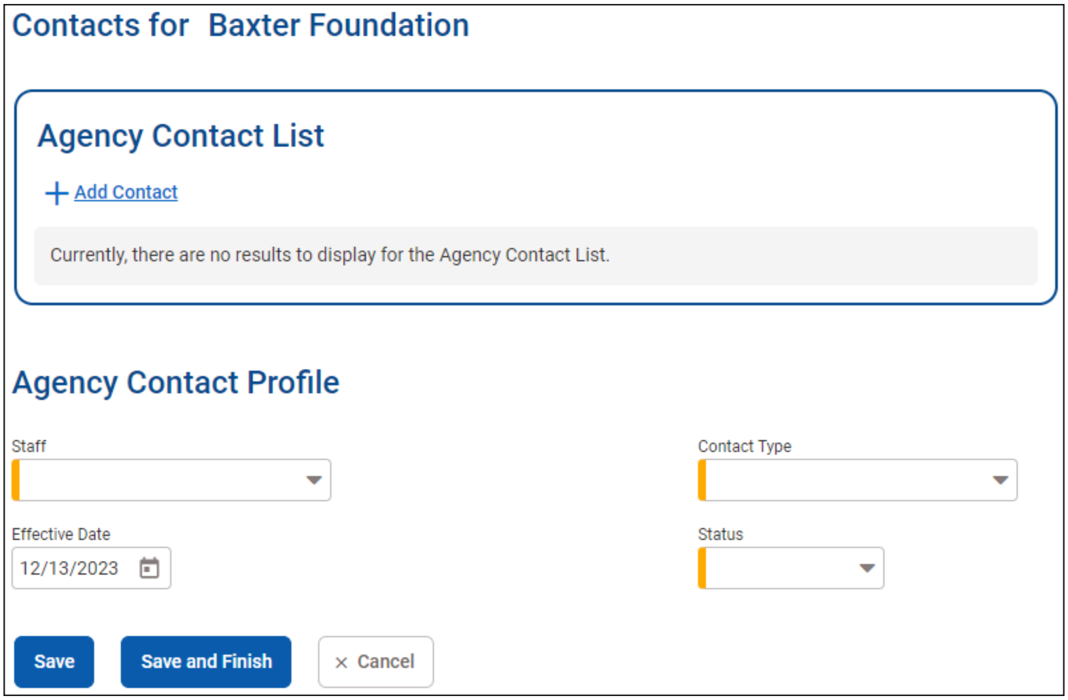



*Figure 15: Add Contact*

5. Click **Save and Finish**.

### 4.1.4. Announcements

Announcements can be set to display in the Announcements section of a user's **Home Page**.

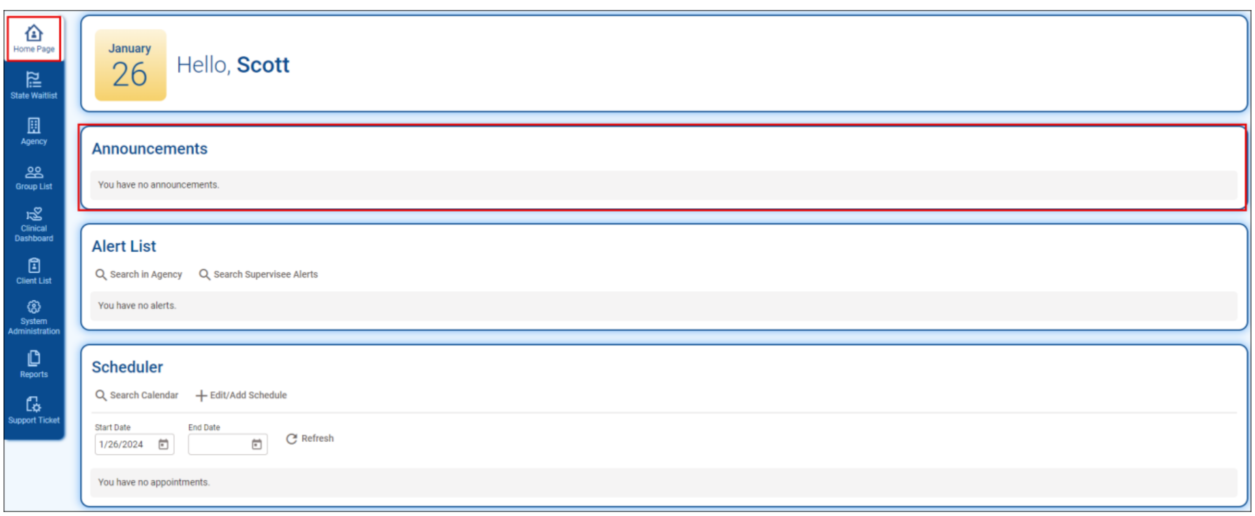



*Figure 16: Home Page*

To create an announcement:

1. From the left Navigation Menu, click **Agency**.
2. In the submenu, click **Agency List** and then click **Announcements**.

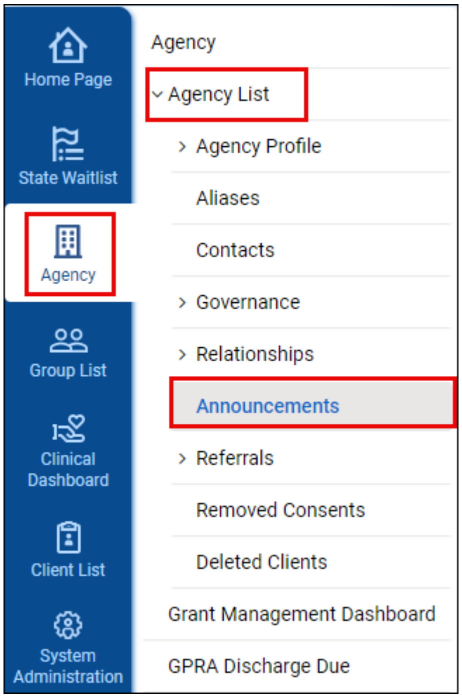



*Figure 17: Accessing Announcements*

3. The Announcement List screen will display.
    a. Previously created Announcements will be listed.

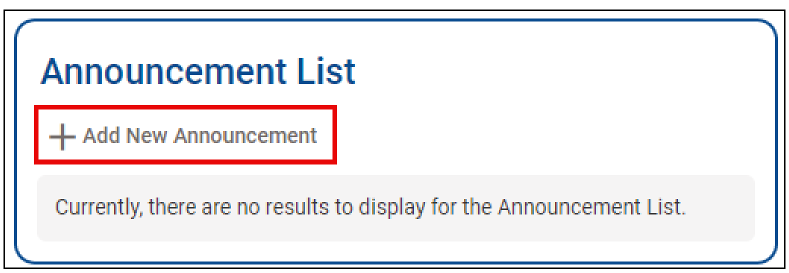



*Figure 18: Add Announcement*

4. Click **+Add New Announcement**.
5. Complete all required and relevant fields.
    a. See table below for field descriptions.

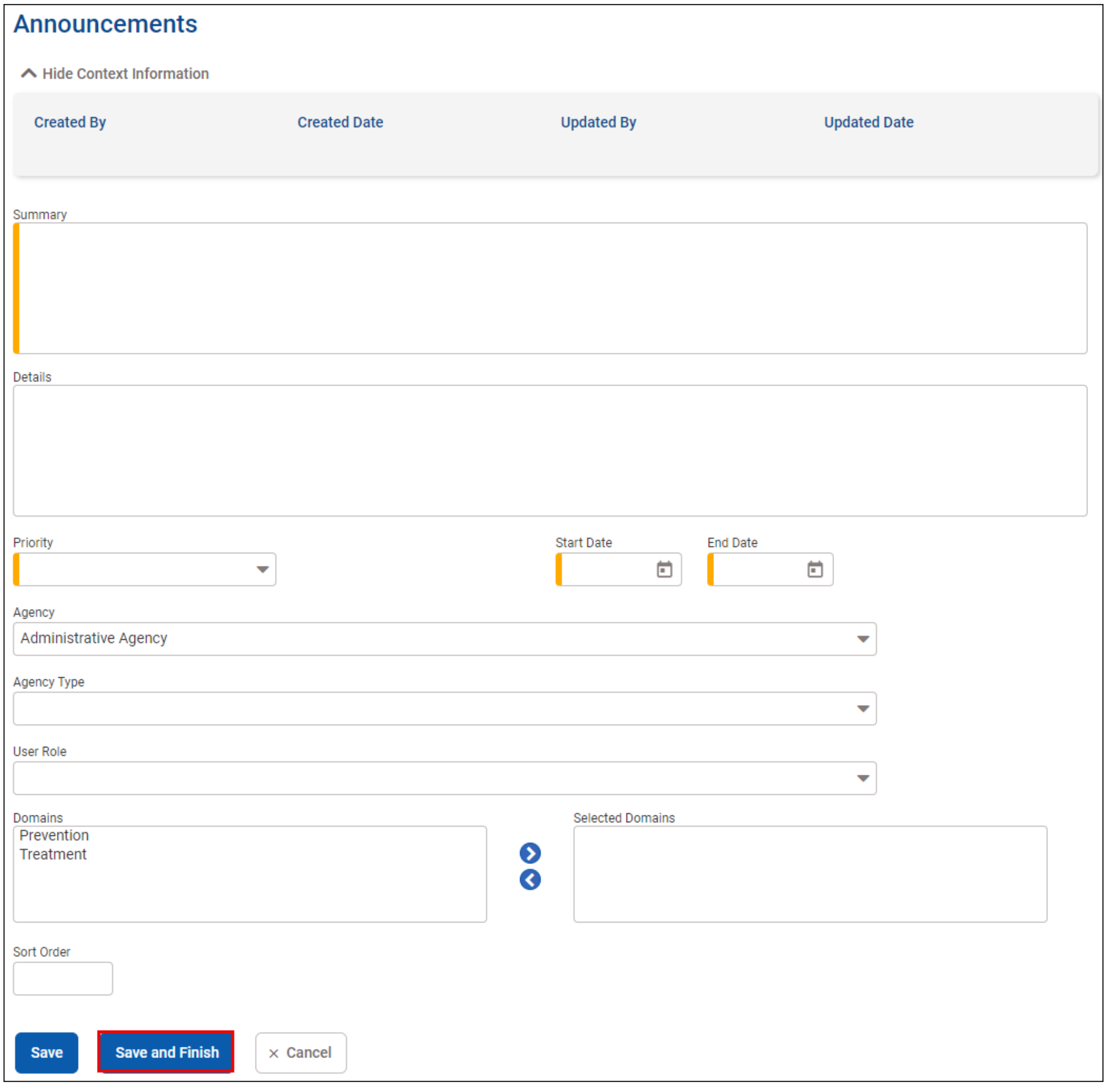



*Figure 19: Announcements*

6. Click **Save and Finish**.

*Table 3: Announcements*

| Field | Description |
|---|---|
| Summary | This is what displays on the Home Page. It can be a summary of the actual announcement recorded in the Details field. |
| Details | The detailed announcement message (This may not be needed if the summary is enough to convey the message). |
| Priority | This will identify the announcement as normal or high on the Home Page. |
| Start Date | The first day the announcement will display. |
| End Date | This is the last day the announcement will display. |

| Field | Description |
|---|---|
| Agency | Set this if the announcement only applies to a specific agency. |
| Agency Type | Set this if the announcement applies to a specific agency type. |
| User Role | Set this if the announcement applies to a specific user role. |
| Domains | Set this if the announcement applies to a specific domain (more than one domain can be selected). |
| Sort Order | Entering a number here will determine the order the announcement displays (if this is left blank, then the announcement will display at the top of the list). |

7. The announcement will display on the Home Page during the set date range for the specified users.

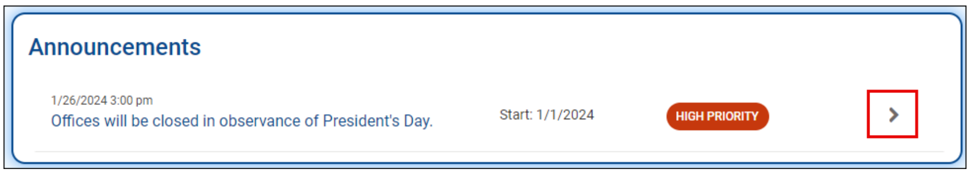



*Figure 20: Home Page - Announcements*

8. To the right of the announcement is an **arrow**. Clicking this will display the announcement's details.

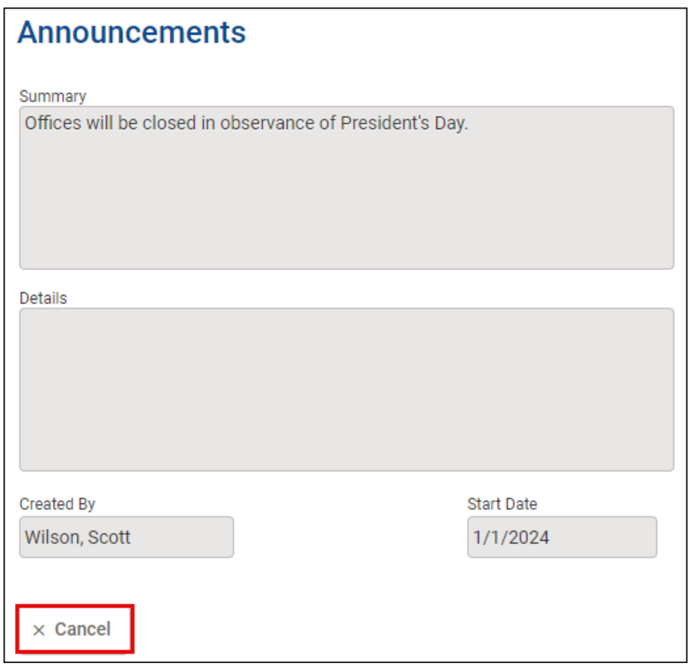



*Figure 21: Announcement Details*

9. Click **Cancel** to return to the Home Page.

If needed, existing announcements can be managed from the Announcement List screen. To the right of the announcement, click the **vertical ellipsis**.

- Edit – This option allows the user to modify an existing announcement.

- Delete – This option will delete the announcement.

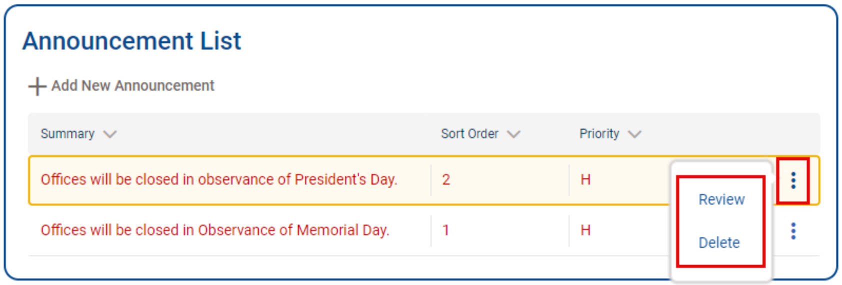



*Figure 22: Modify Announcements*

### 4.1.5. GPRA Agency Screens

Managing the (Government Performance and Results Act) GPRA performance management at the state level can be accomplished using the following screens in WITS. To access the screens, click **Agency** and then click the desired screen.

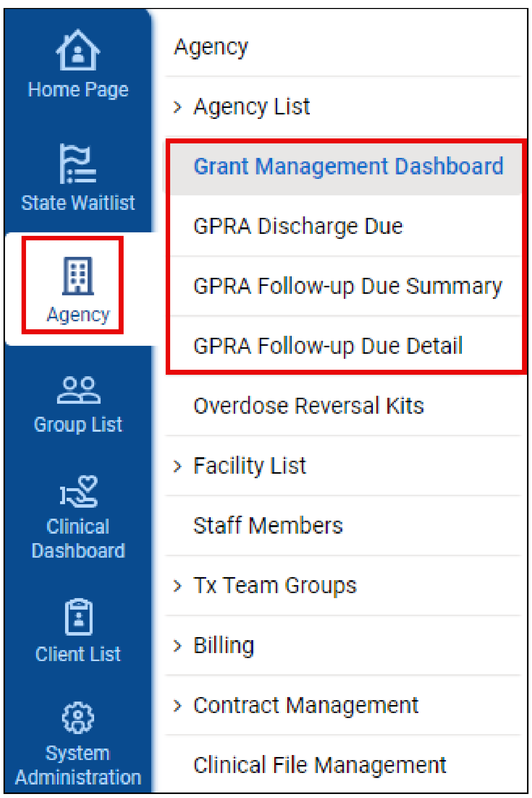



*Figure 23: Accessing GPRA Management Screens*

#### 4.1.5.1. Grant Management Dashboard

The Grant Management Dashboard displays various data regarding the GPRA.

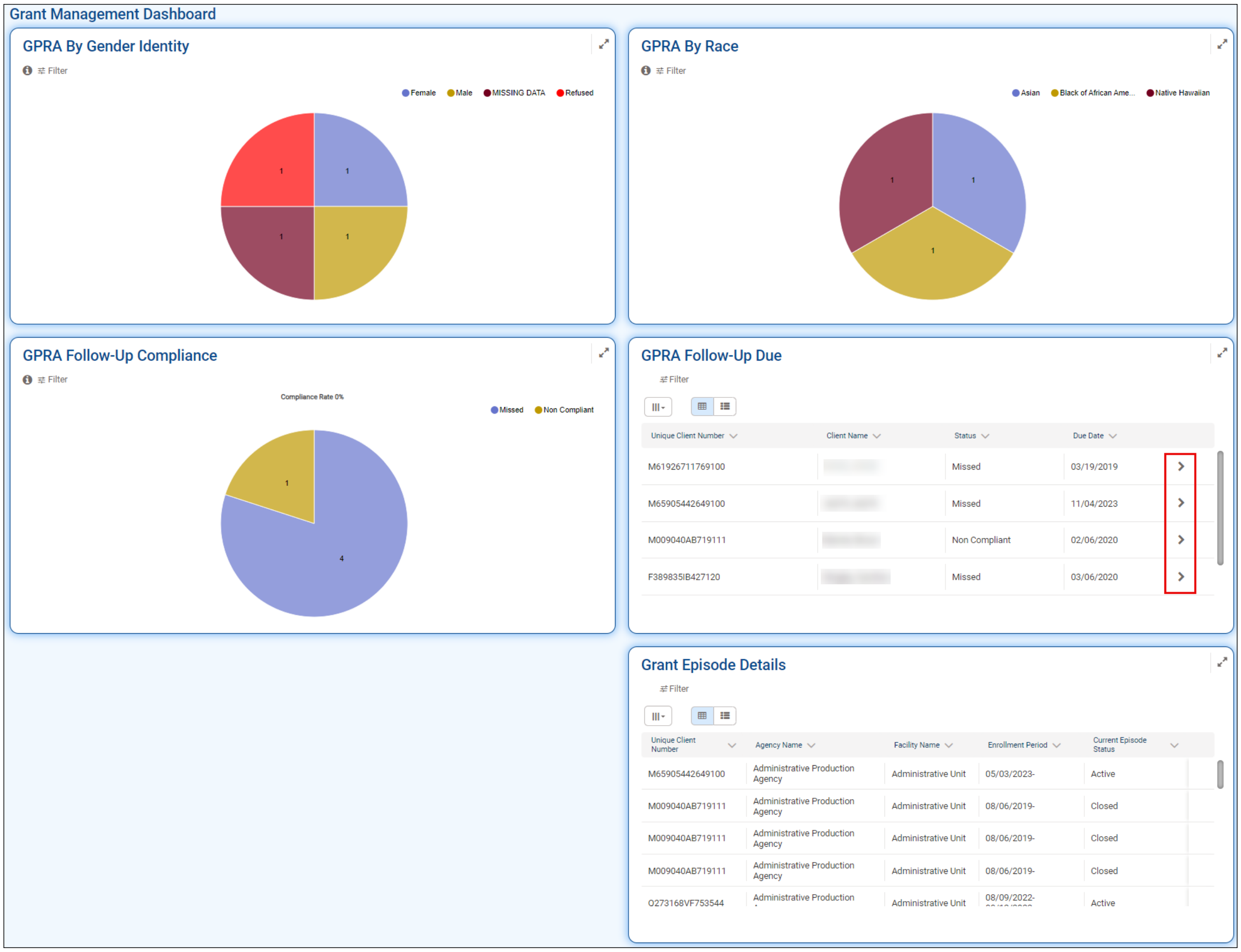


*Figure 24: GPRA Management Dashboard*

In the GPRA Follow-Up Due, clicking the **arrow** to the right of a client record will access the record.

### 4.1.5.2. GPRA Discharge Due

This option will open the GPRA Discharge Due Search screen. The user must enter search criteria to before clicking **Search**.

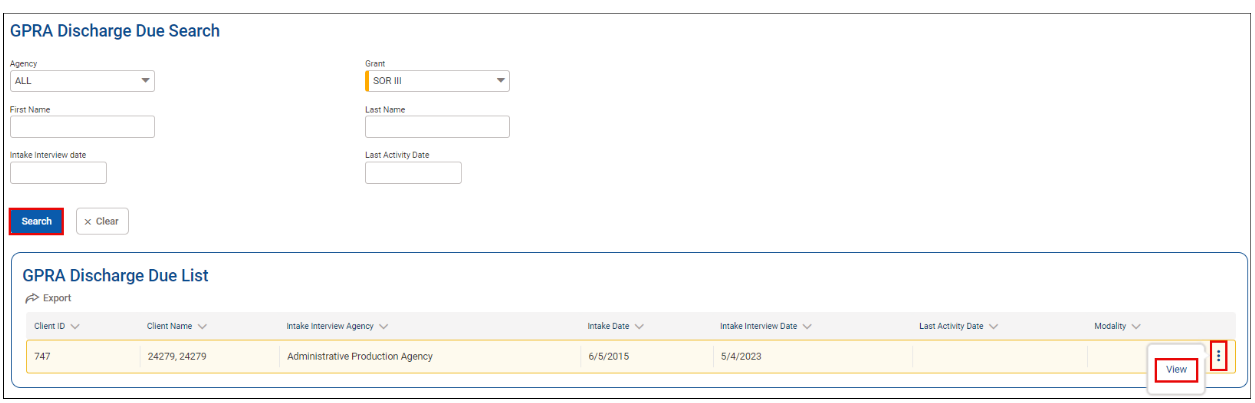


*Figure 25: GPRA Discharge Due*

To the right of a search result, click the **vertical ellipsis** and then click **View** to access the GPRA Assessment screen.

#### 4.1.5.3. GPRA Follow-up Due Summary

This screen provides compliance information regarding the GPRA follow-up interview. **Search** criteria must be entered before results will display.

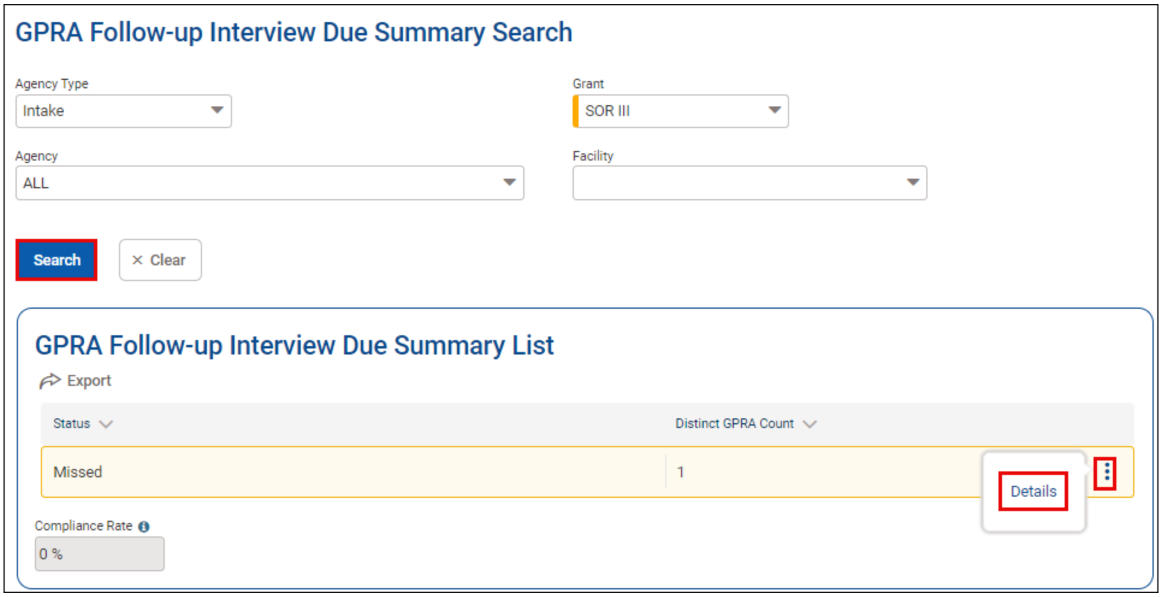



*Figure 26: GPRA Follow-up Due Summary*

To the right of the status, the user can click the **vertical ellipsis** and then click **View** to access the GPRA Follow-up Due Detail screen.

#### 4.1.5.4. GPRA Follow-up Due Detail

This screen provides detailed client information regarding the GPRA follow-up interview. **Search** criteria must be entered before results will display.

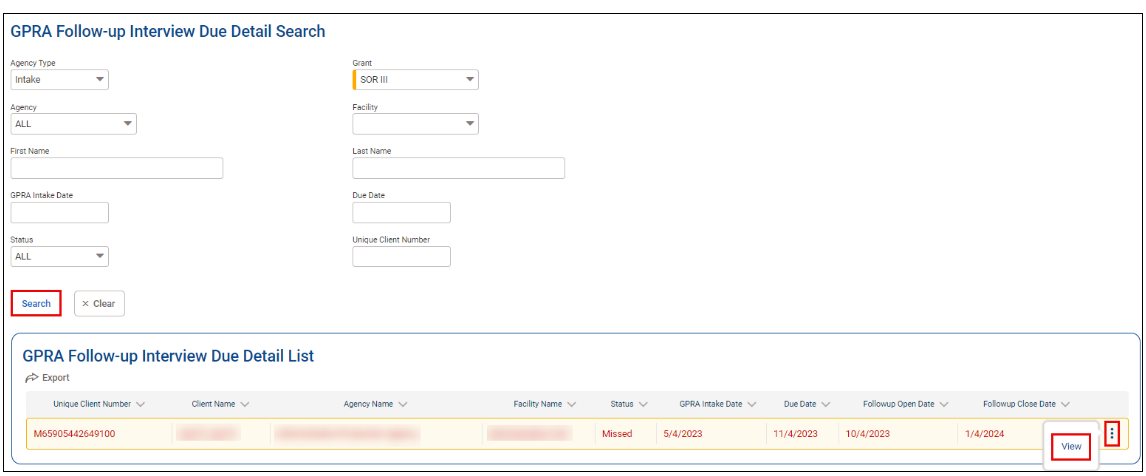



*Figure 27: GPRA Follow-up Due Detail*

To the right of the client, the user can click the **vertical ellipsis** and then click **View** to access the GPRA Assessment screen.

### 4.1.6. Overdose Reversal Kits

Agencies can manage record data on their overdose reversal kits. This screen allows for recording the administration, distribution, and purchase of Naloxone.

To record one of these events:

1. From the left navigation, click Agency.
2. In the Agency submenu, click Overdose Reversal Kits.

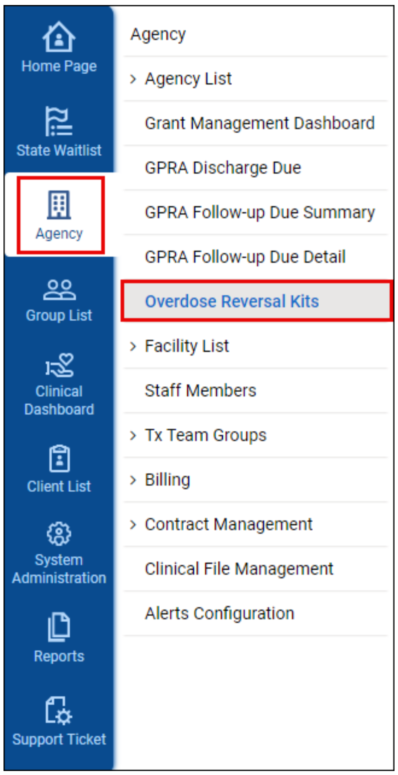



*Figure 28: Accessing Overdose Reversal Kits*

3. The Overdose Reversal Kit Event Search screen will display.
    a. Any previously created events will display here.
    b. A search can be performed to narrow the results displayed.

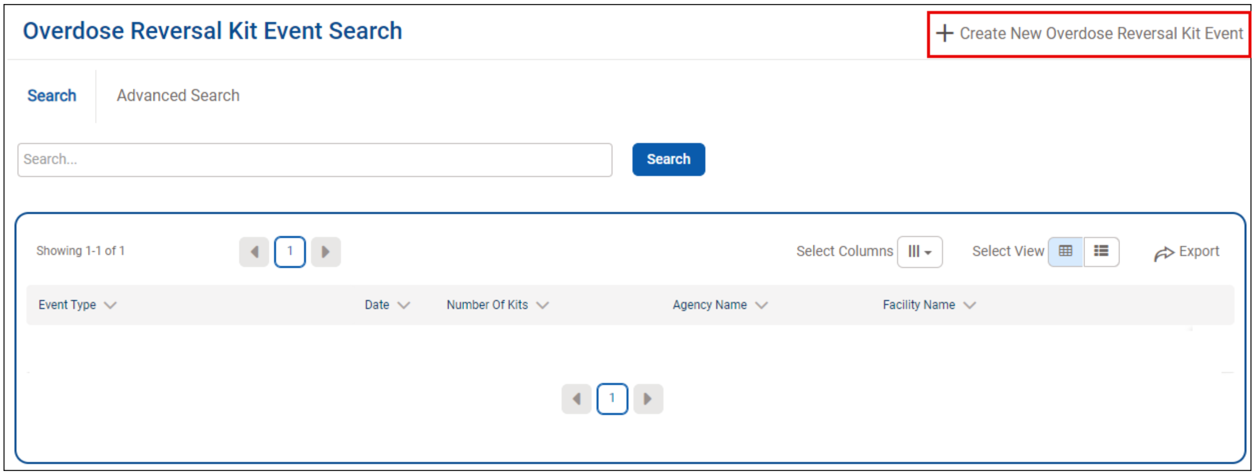



*Figure 29: Create Overdose Reversal Kit Event*

4. In the top right of the screen, click **+Create New Overdose Reversal Kit Event**.
5. The Add Overdose Reversal Kit Event will open.

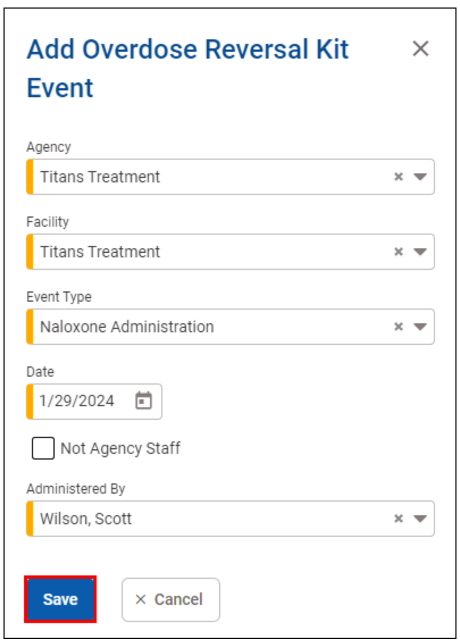



*Figure 30: Add Overdose Reversal Kit Event Window*

6. Complete all fields and then click **Save**.
7. The corresponding workspace will display.
    a. The different sections of the workspace are listed on the left.
    b. The workspace will display different fields depending on the event chosen.

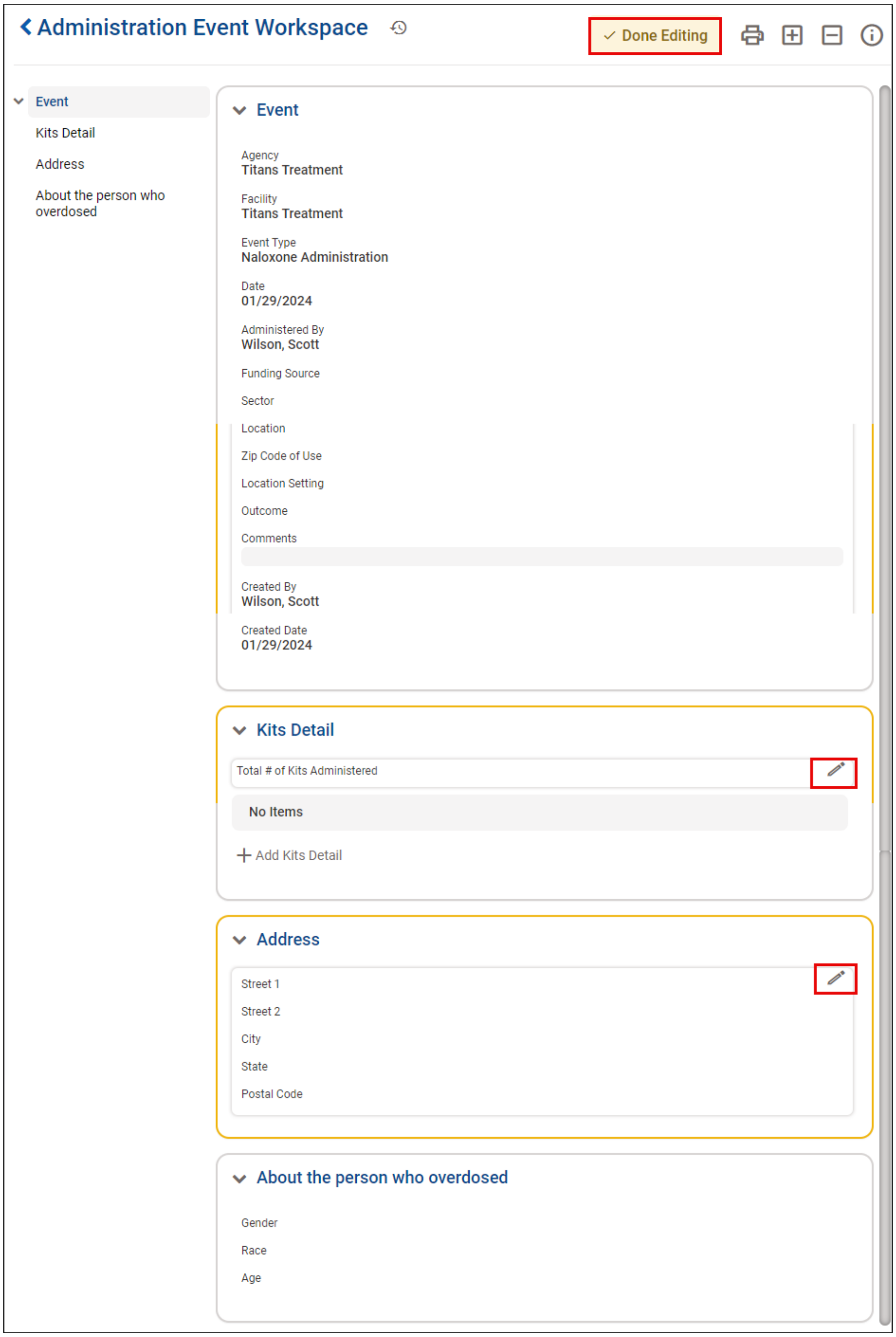



*Figure 31: Overdose Reversal Kit Workspace*

8. Hover over each section to display the pencil (edit) icon. Click on the **pencil icon** to edit the fields.
    a. These sections will show required fields.
    b. Complete required and relevant fields.
    c. Click **Save**.

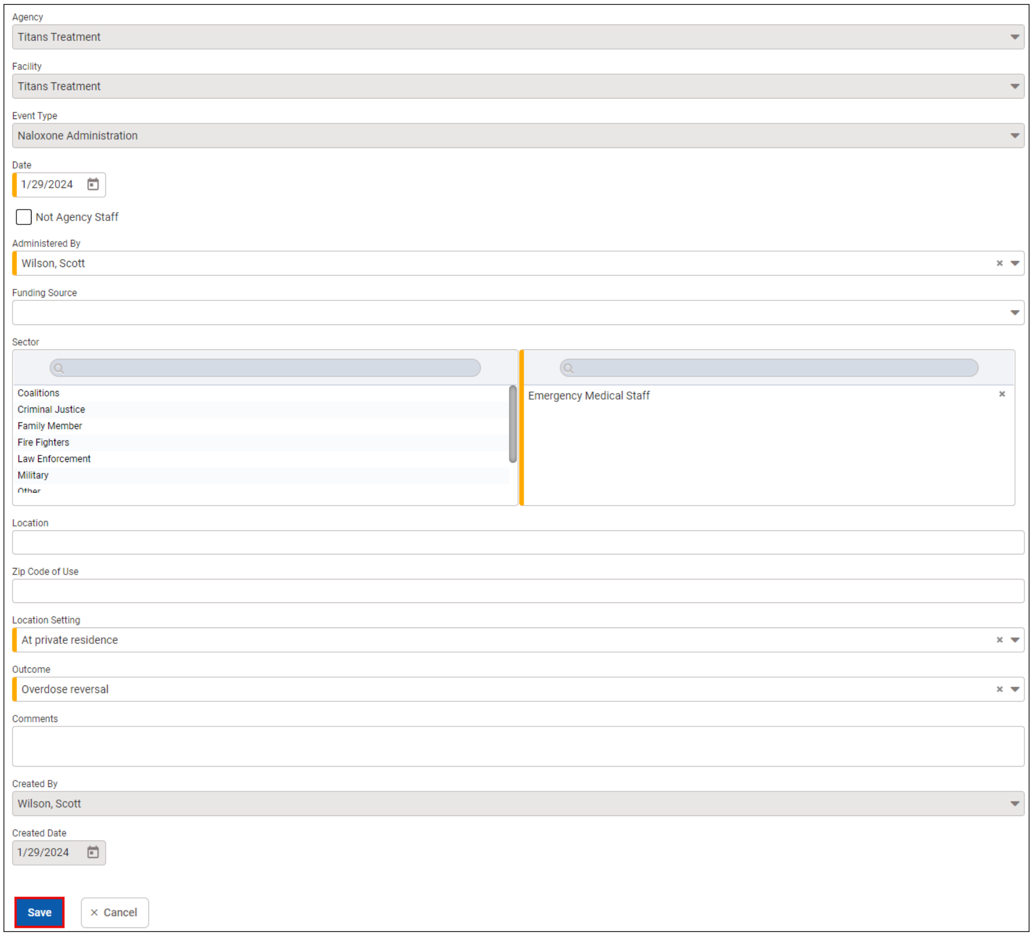



*Figure 32: Workspace Section*

9. Complete each section, as necessary.
10. Click **Done Editing** once finished.

## 4.2. Facility Management

Be aware of the following regarding facilities and their management:

- The agency must be created before any facility management can be performed.
- Facilities are the physical location for the agency.
- There may be more than one facility assigned to an agency.

### 4.2.1. Facility Creation

The following steps must be completed for each of an agency's locations.

To create a facility:

1. Access the agency profile.
2. From Agency's sub-menu, click **Facility List**.
3. The Facility List screen displays.
    a. Any existing facilities will display here.

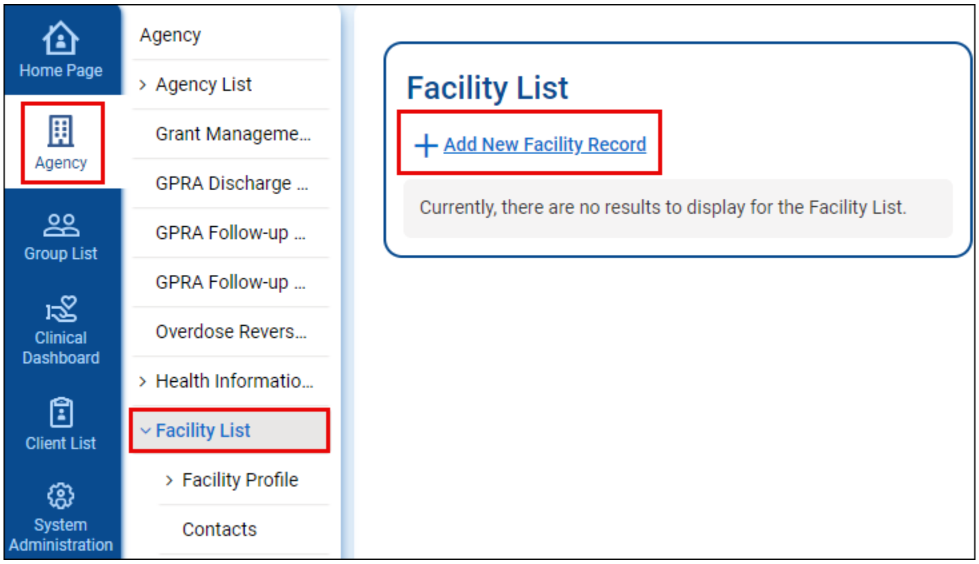



*Figure 33: Facility List*

4. Click **+Add New Facility Record**.

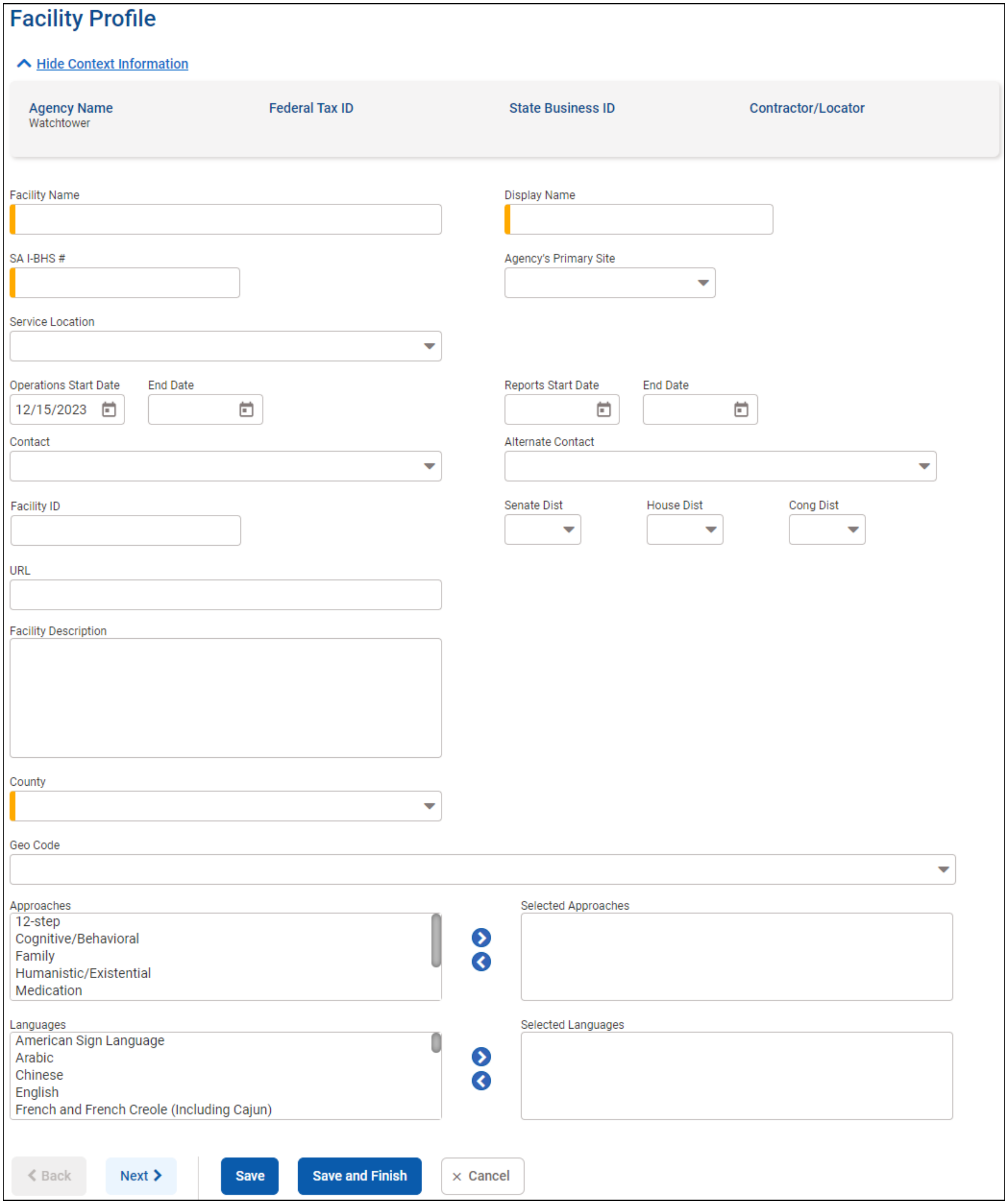



*Figure 34: Facility Profile*

5. At the very least, the required fields must be completed.
    a. If information is known, the appropriate fields should be completed as well.
    b. See table *Facility Profile* for information on fields not covered under *Agency Profile*.

*Table 4: Facility Profile*

| Field | Description |
|---|---|
| SA I-BHS # | Substance abuse inventory of behavioral health services number. |
| Agency's Primary Site | This is used if the agency is a child of another agency. |
| Service Location | The location type where the services are administered. |
| Operation's Start Date / Operation's End Date | The start and end dates of the facility. |
| Reports Start Date / Reports End Date | This can be set to track when TEDS or other federal/state reporting started for the facility. |
| Contact / Alternate Contact | Points of contact for the facility. These must first be set under Agency > Contacts |
| Facility ID | This is a generic field that the state can use to identify facilities. |
| Facility Description | Comment box to allow the provider to enter a description for the facility. |
| Approaches → Selected Approaches | The behavioral health approaches offered by the facility. |
| Languages → Selected Languages | The languages supported at the facility. |

6. Click **Save** and then click **Next**.

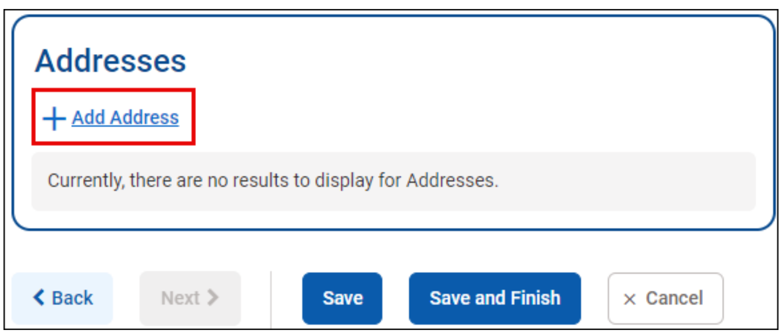



*Figure 35: Facility Address*

7. The Addresses screen will display. Click **+Add Address**.
8. At minimum, complete the required fields.

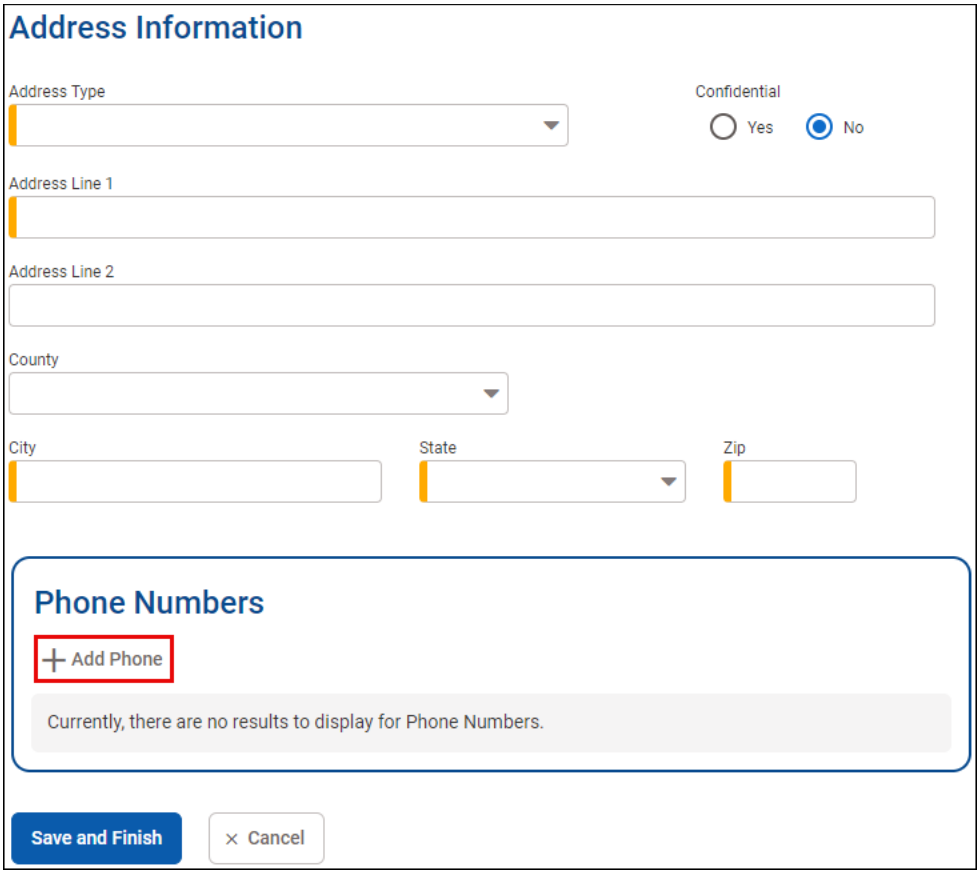



*Figure 36: Facility Address Information*

9. Under Phone Numbers section, click **+Add Phone**.

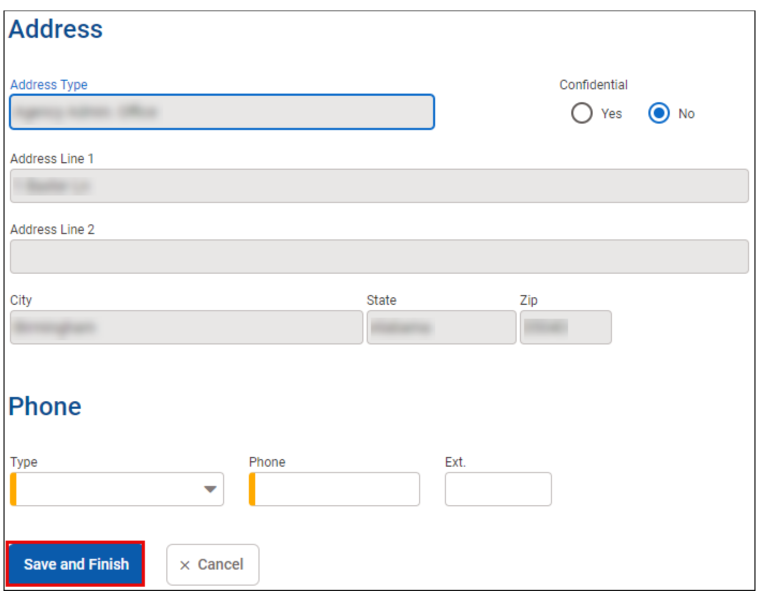



*Figure 37: Facility Phone Information*

10. Enter the phone information and click **Save and Finish**.
11. The user is returned to the Address Information screen.
    a. To edit a phone number, click the **vertical ellipsis** to the right of the phone number.
    b. Click **Review** to make the phone fields editable.
    c. Click **Delete** to remove the phone number.

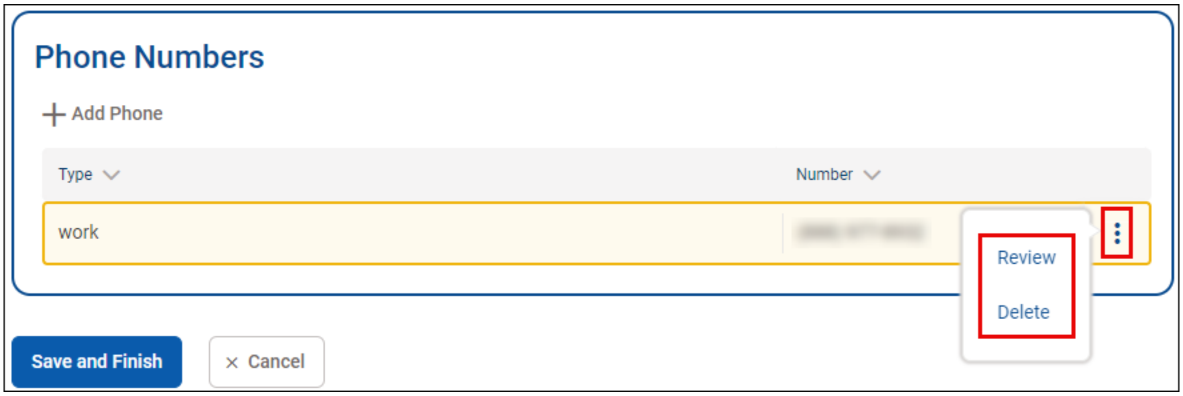



*Figure 38: Edit Facility Phone Number*

12. If more than one phone number needs to be recorded, click **+Add Phone** and repeat steps until all numbers are entered.
13. On the Address Information screen, click **Save and Finish**.
14. The user is returned to the Addresses screen.
    a. To edit an address, click the **vertical ellipsis** to the right of the address.
    b. Click **Review** to return to the Address Information screen.
    c. Click **Delete** to remove the Address.

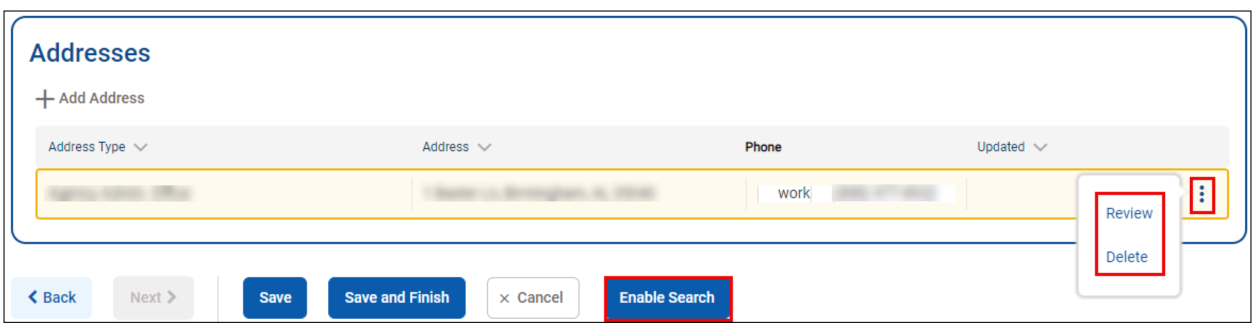



*Figure 39: Edit Facility Addresses*

15. If more than one address needs to be recorded, click **+Add Address** and repeat steps until all addresses are entered.
    a. Each address added will need to have at least one phone number.
16. Once all addresses and phone numbers have been entered, click **Save and Finish**.

The user is returned to the Facility List screen. However, there are some items to note.

- Under the user's name in the top right corner, the Agency and Facility hyperlink is now set to the facility just created.

- If the user clicks **Facility Profile**, the facility's profile will automatically display without needing to be selected from the Facility List screen.
- Repeat the steps for Facility Creation for each of the agency's physical locations.

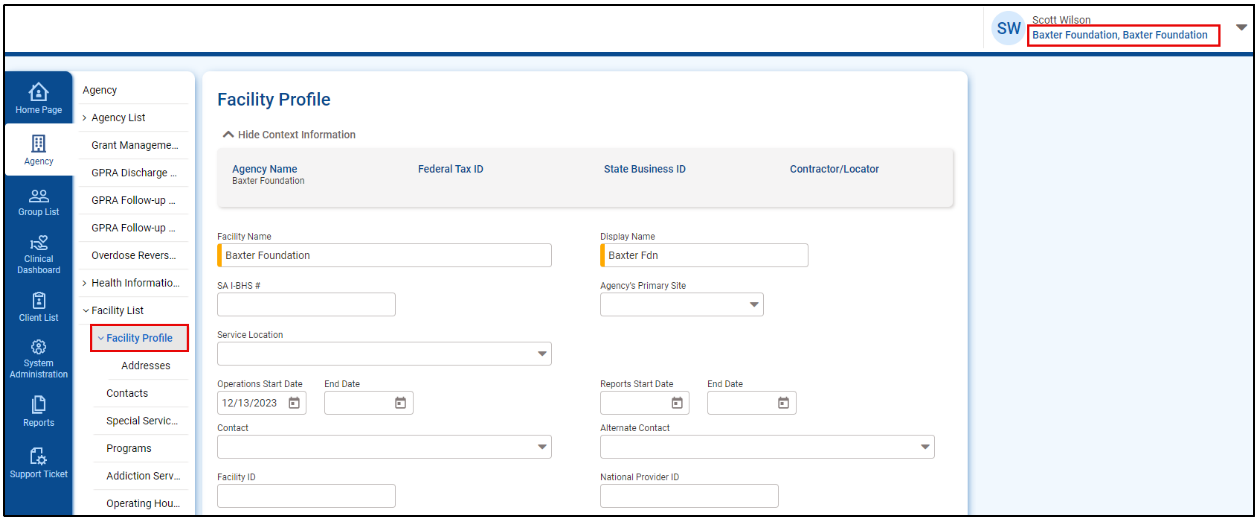



*Figure 40: Set Facility*

### 4.2.2. Facility Navigation

**NOTE:** Before a facility record can be accessed, the user must access the parent agency record. See Agency Navigation for instructions on accessing an agency record.

To make changes to a facility and its associated screens, the facility record has to be active.

1. From the left Navigation Menu, click **Agency**.
2. The Agency Search screen displays.
3. Locate the agency under Agency List.

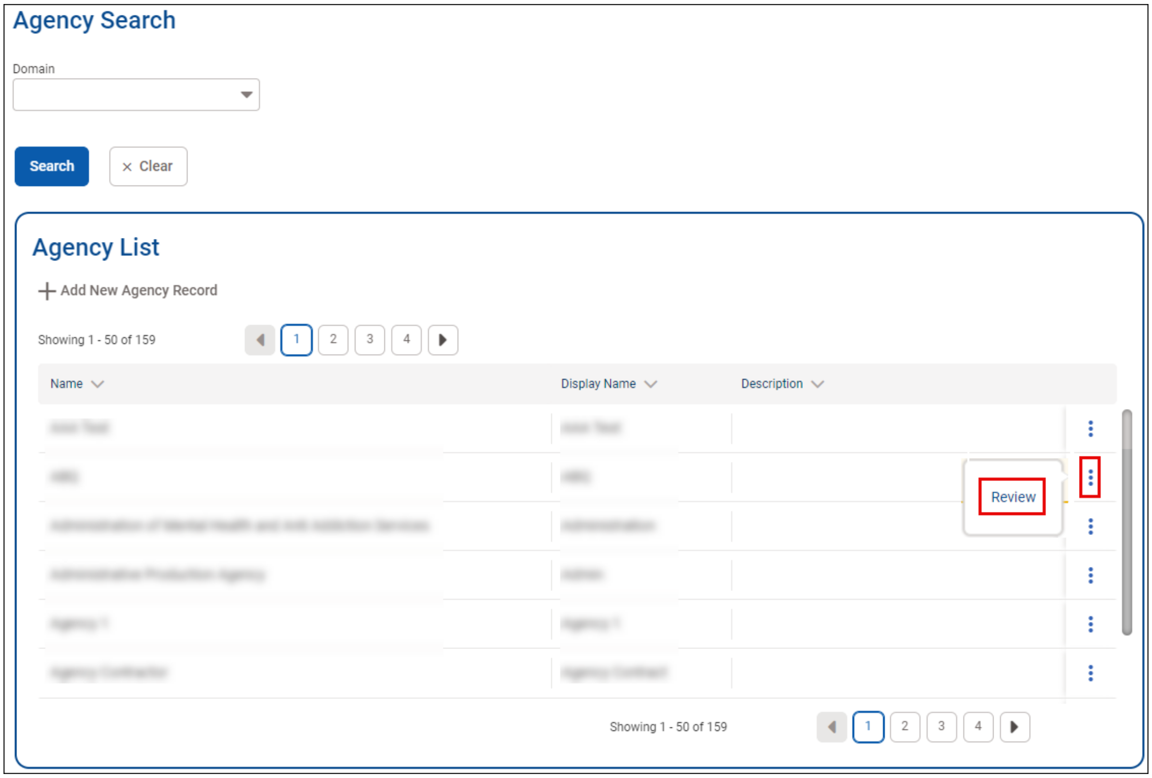



*Figure 41: Facility Navigation*

4. To the right of the agency, click the **vertical ellipsis** and then click **Review**.
5. The Agency Profile displays.
6. From Agency's sub-menu, click Facility List.

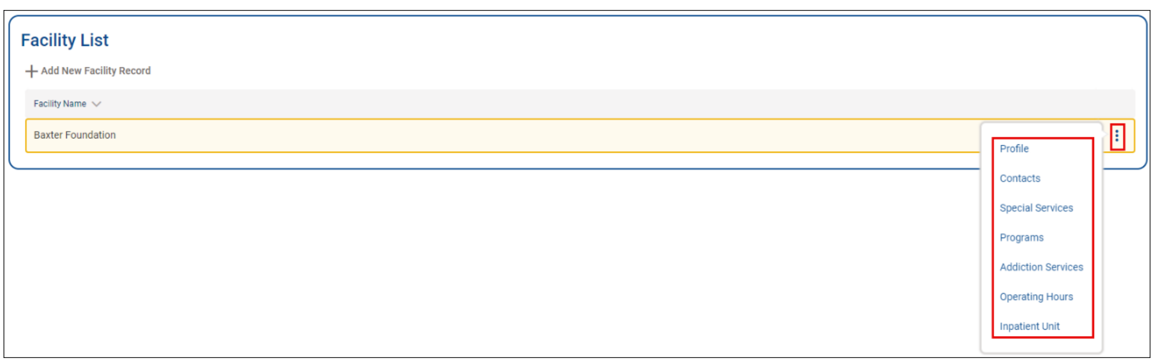



*Figure 42: Facility Menu Options*

7. To the right of the facility, click the **vertical ellipsis** and then click the desired option.
8. Once any of the options are selected, the sub-menu options for facility will be available.

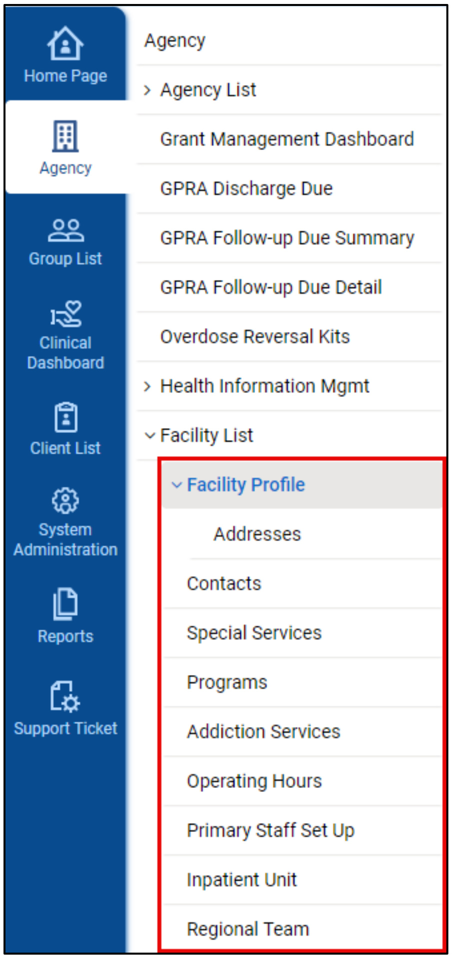



*Figure 43: Facility Sub-Menu*

### 4.2.3. Programs

Programs represent the different levels of care provided in the facility. Programs may be either Treatment Episode Data Set (TEDS)-reportable or not. FEI recommends ADMH maintains programs since the programs contain key data elements used for contract management and reporting.

If a new program needs to be added to a facility, complete the following process.

1. Navigate to the facility profile (see Facility Navigation).

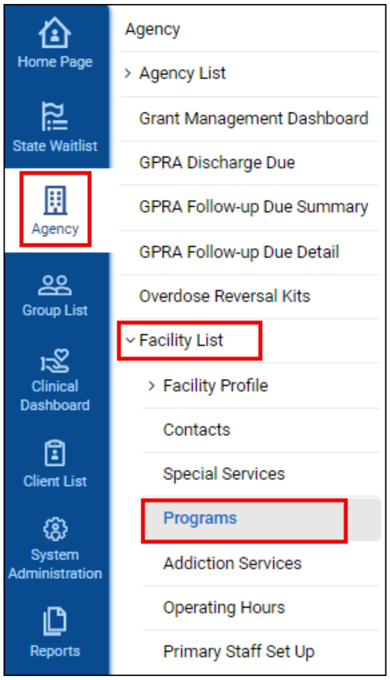



*Figure 44: Programs*

2. From the sub-menu, click **Programs**.
3. The Program List screen displays.

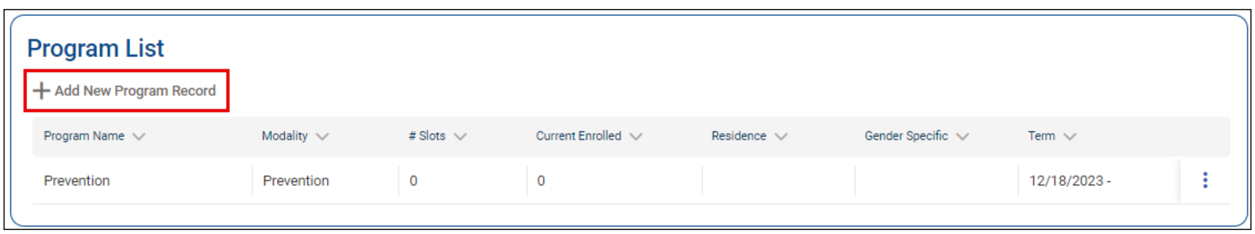



*Figure 45: Add Program Record*

4. Click **+Add New Program Record**.
5. Complete all required and relevant fields on the Program Setup screen.

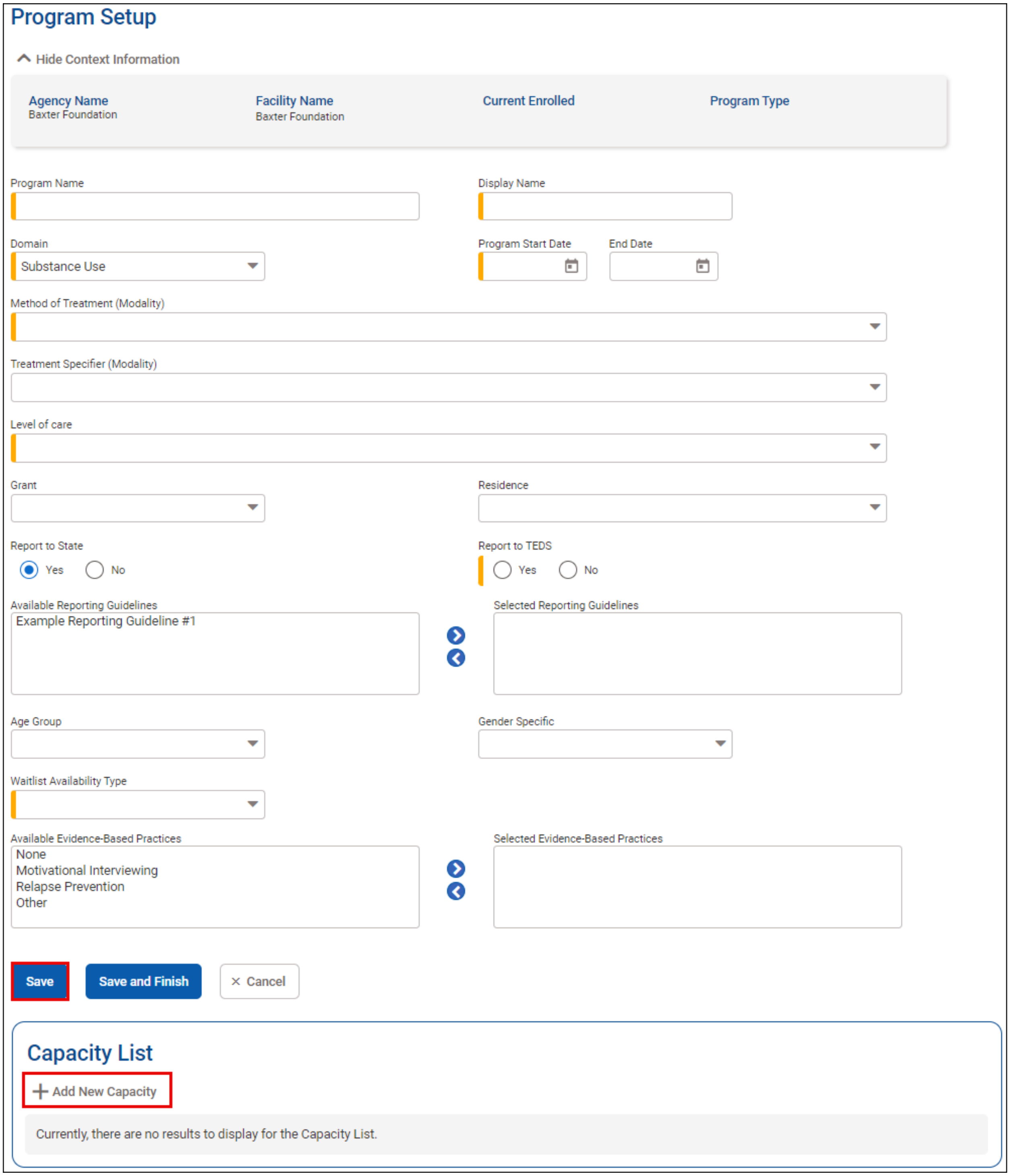



*Figure 46: Program Setup*

6. Click **Save**.
7. If capacity needs to be set, click **+Add New Capacity** under the Capacity List section.
    a. Each program must have at least one capacity record.
8. Complete all required and relevant fields.

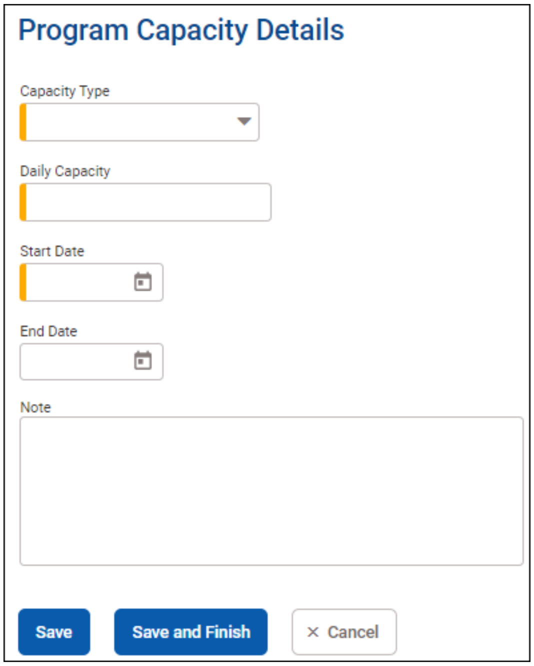



*Figure 47: Program Capacity Details*

9. Click **Save and Finish** to be returned to the Program Setup screen.
10. Click **Save and Finish** to complete setup.

If changes ever need to be made to the program, including available capacity, click on the **vertical ellipsis** to the right of the program and then click **Review**.

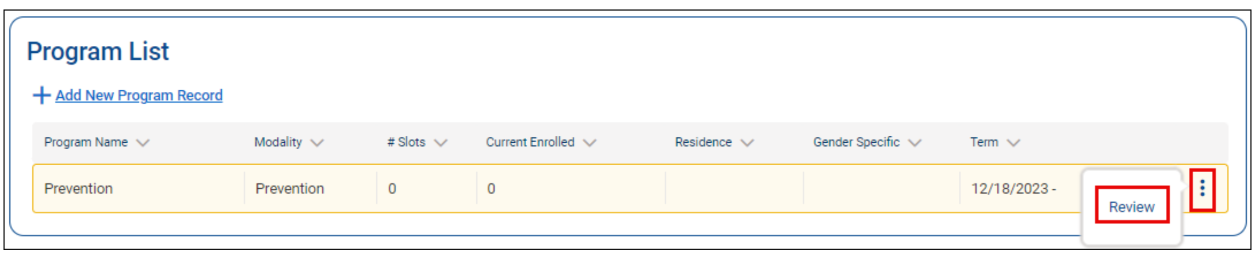



*Figure 48: Edit Program*

## 4.3. Staff Management

Once the agency has been created, staff can be assigned.

**NOTE:** Since staff will likely need to be assigned to a facility, it is recommended that a staff account is not created until after all facilities have been created.

### 4.3.1. Staff Creation

Before creating a staff member, the admin will access the agency the staff member will be assigned.

1. From the left Navigation Menu, click **Agency**.

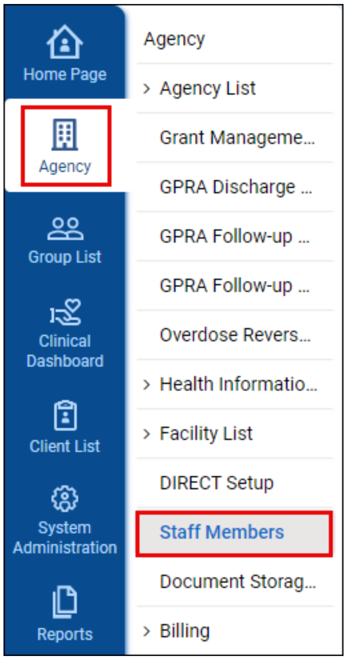



*Figure 49: Staff Member Navigation*

2. In the sub-menu, click **Staff Members**.
3. The Staff Member Search screen displays.
    a. The user can search for existing users already assigned to the agency.
    b. Staff members will be listed under the search section.

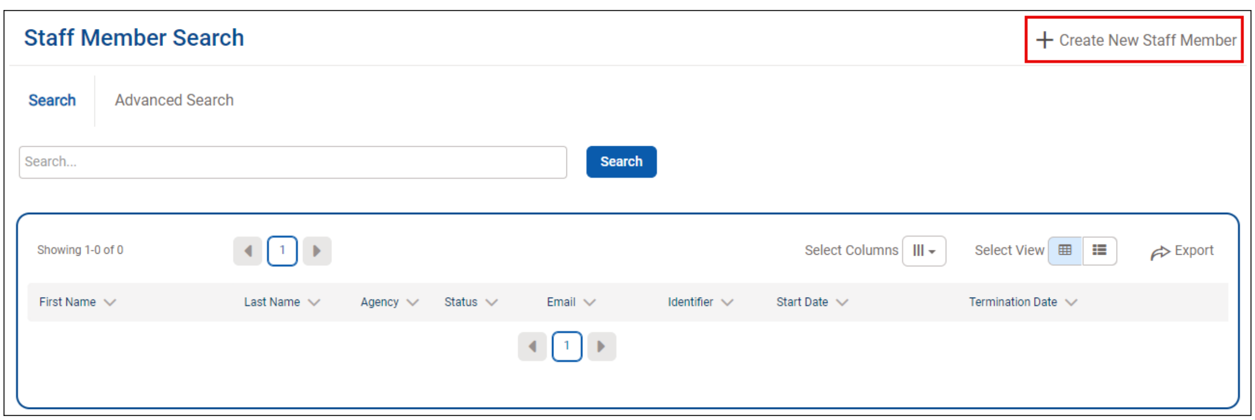



*Figure 50: Create Staff Member*

4. In the upper right corner of the screen, click **+Create New Staff Member**.
5. The Add Staff Member window appears.

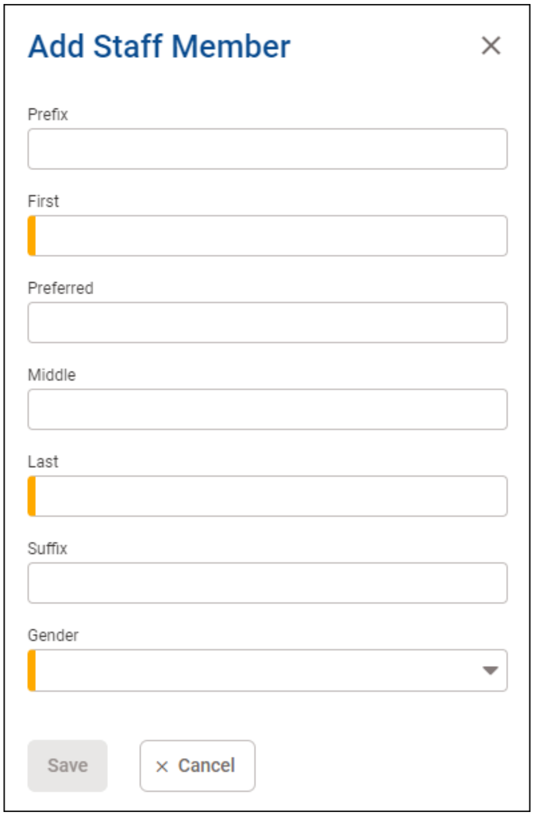



*Figure 51: Add Staff Member*

6. At a minimum, complete the required fields and click **Save**.
7. The screen will refresh, and the user will now be on the Staff Member Workspace.
    a. The workspace is divided into four parts.
        i. Sections of the workspace are listed to the left for quick navigation.
        ii. The main workspace and its sections are used to define a staff member and their role.
        iii. Various action buttons that allow the user to manipulate the workspace.
        iv. On the right, are two parts.
            1. Completion Requirements – Displays the minimum tasks that must be completed for the staff member's account.
            2. Additional Items – Navigation actions that can be selected to quickly access different parts of the staff member's workspace.

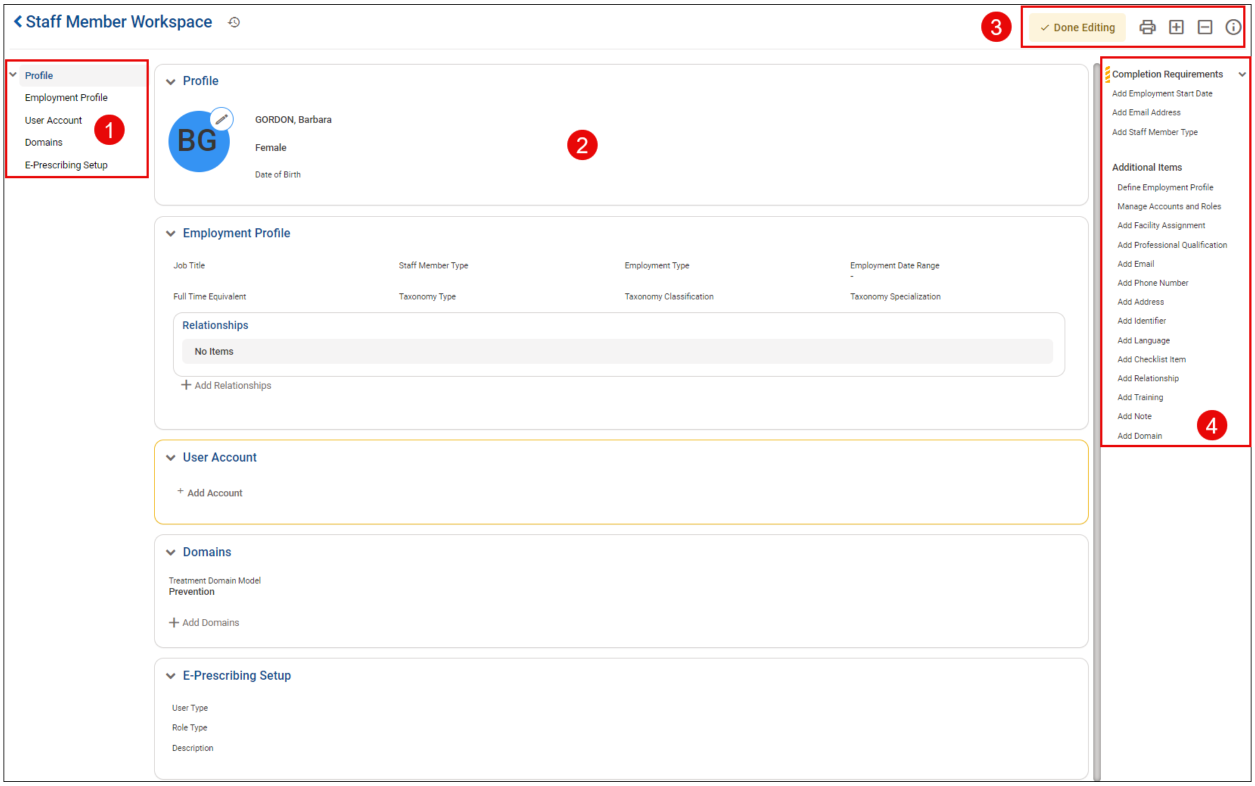



*Figure 52: Staff Member Workspace*

8. Resolve the Completion Requirements.
    a. Clicking on a completion requirement will navigate to the associated section of the workspace.
    b. Completion Requirements vary depending on state requirements. See table 5.
        i. Add Employment Start Date
        ii. Add Staff Member Type
        iii. Add Email Address
        iv. Add Social Security Number

*Table 5: Required Fields*

| Requirement | Workspace Location | Description |
|---|---|---|
| Employment Start Date | Employment Profile | • This is the Employment Date Range.<br>• The first box is the start date.<br>• The second is the user's termination date (in instances of temporary hires). This can be left blank for permanent employees.<br>• Has end date can be unchecked for permanent employees. |
| Staff Member Type | Employment Profile | The user's role at the agency. |
| Email Address | Contact Information | The user's primary email address. It should be their work email address. |
| Social Security Number | Identifiers | The user's SSN. |

9. Complete other sections of the workspace as needed.
   a. See [Staff Member Workspace] for information on the different sections.

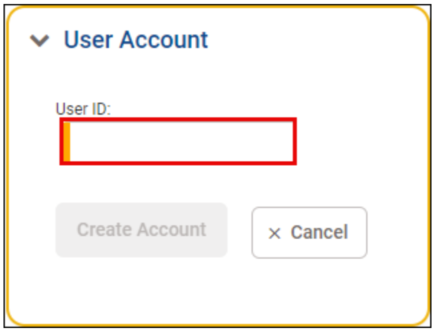



*Figure 53: User Account*

10. Under workspace section User Account, click **+Add Account**.
    a. **NOTE:** This only needs to be done for users that will need to access WITS.
    b. Enter User ID and click **Create Account**.
    c. Two emails are generated as discussed in *WITS Overview and Basic Navigation*.
11. Roles will now display under the User Account section.


*Figure 54: Manage Roles*

12. Click **+Manage Roles** in the User Account section.
13. Assign roles to the user's account as needed.
    a. Search for the role(s) to be assigned.

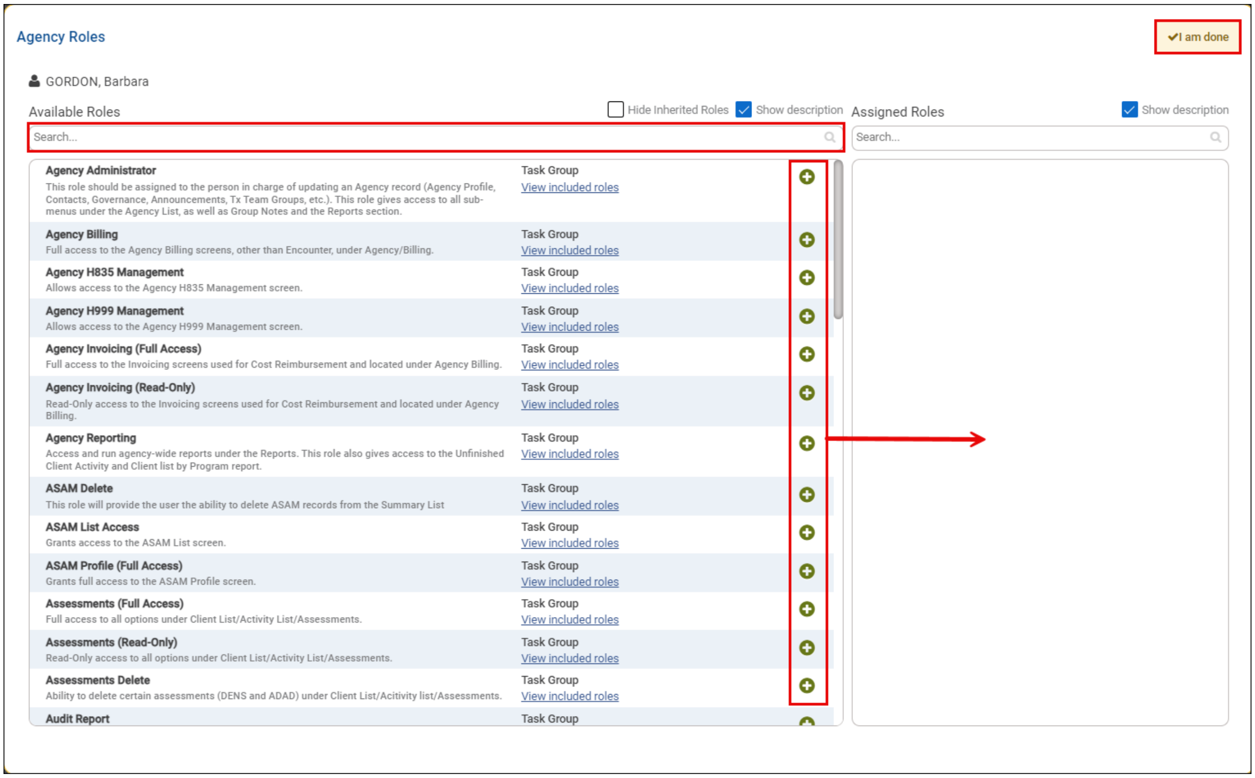



*Figure 55: Assigning Roles*

14. Click the **+** symbol to the right of the Available Role to move it to the Assigned Roles box.
    a. See table below for information on roles and their uses.

*Table 6: Agency Roles*

| Role Name | Description |
|---|---|
| Agency Reporting | Allows the user to run agency wide reports. |
| Assessments (Full Access) | This role allows the user to access and create assessments. |
| Assessments (Read Only) | This role allows the user to view assessments for a client. |
| Client Diagnosis (Full Access) | Grants access to diagnosis fields on all screens with these fields. |
| Client Diagnosis (Read Only) | This role allows the user to only view a client's diagnosis. |
| Client Profile (Full Access) | The user can access, create, and modify client records. |
| Client Profile (Read Only) | The user can only view client profiles. |
| Clinical (Full Access) | Grants access to all clinical options under Client and Activity. |
| Clinical (Read Only) | The user can access but not modify clinical screens/fields under Client and Activity. |
| Clinical Dashboard Oversight | Allows the user to query all staff on the Clinical Dashboard and allows to user to see all client cases associated with a staff member. |
| Clinical Supervisor | This role allows the user to manage all aspects of client consent in and out of the agency. The user can also sign off on TX reviews on behalf of other TX review team members. |
| Consent (Delete) | The user can delete unsigned client consents. |
| Consent (Full Access) | This role allows the user to create consents for a client. |
| Consent (Read Only) | This role allows the user to only view consents generated for a client. |
| Create Scheduler Encounter | The user can view and create encounters for scheduled appointments from the Appointment Search screen. |

| Role Name | Description |
|---|---|
| Cross-Agency Waitlist Management (Full Access) | This role allows the user to view, create, and edit waitlist records. |
| Cross-Agency Waitlist Management (Read Only) | The user can only view waitlist records. |
| Discharge (Full Access) | Grants the user the ability to access all options under the Discharge screen. |
| Drug Test Results (Full Access) | The user can access all options under the Drug Test Results screen. |
| Drug Test Results (Read Only) | The user can only view drug test results on the Drug Test Results screen. |
| Group Notes (Full Access) | Enables the “Add Group” link on the Group List screen. |
| Intake (Full Access) | Grants the user access to all options under Intake. |
| Intake (Read Only) | The user can view only intake records. |
| Link Consents | This role allows the user to link clients on the Linked Consents screen. |
| Manage Treatment Team Groups | This role gives the user access to the TX team group menu item under Agency. It allows the user to create treatment team groups and add staff members to them. |
| Non-Treatment Team Access | Grants the user access to cases without being a member of the client’s treatment team. |
| Notes (Full Access) | Grants the user access to all options under the Notes screen. |
| Notes (Read Only) | The user can only view notes on the Notes screen. |
| Outcomes (Full Access) | Grants the user access to all options under Outcomes Measures. |
| Outcomes (Read Only) | The user can only view information records under Outcome Measures. |
| Referrals (Full Access) | Grant the user access to all options under the Referrals screen. |
| Referrals (Read Only) | Grants the user view only access to the Referrals screen. |
| Reports Access | Grants the user access to the Reports module in WITS. |
| Screening (Full Access) | Grants the user access to all options under Screening menu. |
| Screening (Read Only) | This role allows the user to view screenings recorded for a client. |
| Sign Off and Finalize Treatment Plan | Only users with this role can finalize and sign off on a treatment plan. |
| Sign Off Treatment Plan | Allows the user to sign off on a treatment plan. |
| Tx Encounter (Full Access) | Grants the user access to all options under Client, Activity, and Encounter. |
| Tx Encounter (Read Only) | Grants the user read only access to Client, Activity, and Encounter. |
| Tx Medications (Full Access) | Grants the user access to all options under the Medication screen. |
| Tx Medications (Read Only) | Grants the user read only access to the Medications screen. |
| View Consented Clients | This role allows the user to view consents recorded for a client. |
| View Treatment Plan | This role allows the user to view a client’s treatment plan. |
| Vital Signs (Full Access) | Grants the user access to all options under the Vital Signs screen. |
| Vital Signs (Read Only) | This role allows the user to only view recorded vitals for a client. |

15. Click **I am done** in the top right corner of the window when finished.
16. From Additional Items on the right, click **Add Facility Assignment**.
    a. If the user will have access to multiple facilities, each one will need to be assigned.
17. The Facilities window displays.
    a. Click on the facility the user will be accessing.
    b. Set the Effective Date Range.
        i. End date is blank for permanent employees of the facility.
    c. Click Save.
    d. Repeat these steps for each facility the user will be accessing.
18. Click **Done Editing** in the top right corner of the Staff Member Workspace to lock fields.


*Figure 56: Leaving Staff Member Workspace*

19. Click **<** to the left of Staff Member Workspace to leave the record and return to the Staff Member Search screen.

## 4.3.2. Staff Member Workspace

Each section of the Staff Member Workspace is explained here to assist admins in completing user setups.

### 4.3.2.1. Profile

The user's name, gender, and date of birth display here if those fields are set.

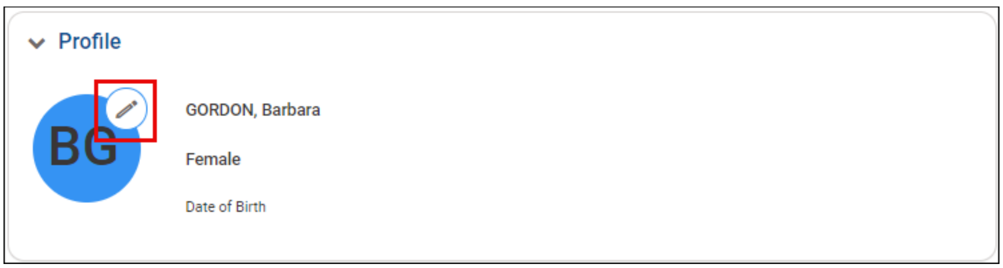



*Figure 57: Staff Member Profile*

A photo can also be added to the profile by clicking the pencil icon.

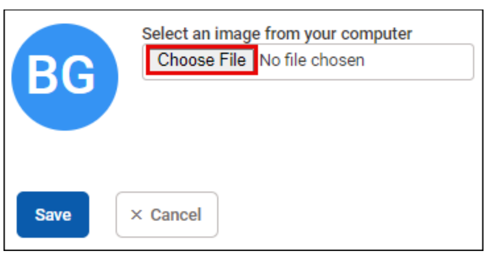



*Figure 58: Profile Image Upload*

The admin will be prompted to choose the image file.

- The file must be accessible from the user's computer.
    - Exists on local drives.
    - Exists on accessible server drives.

### 4.3.2.2. Employment Profile

There are two places in this section for managing information regarding the user's employment at the agency.

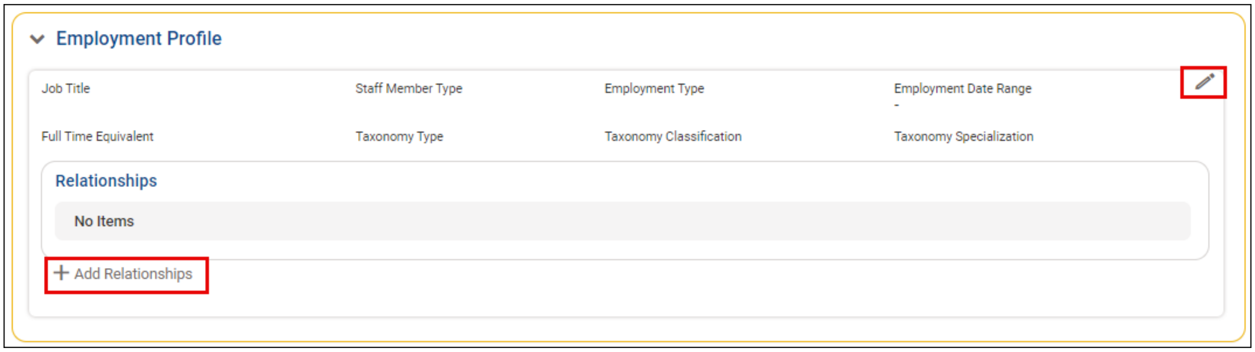



*Figure 59: Employment Profile*

The **Pencil** icon allows the following information to be edited.

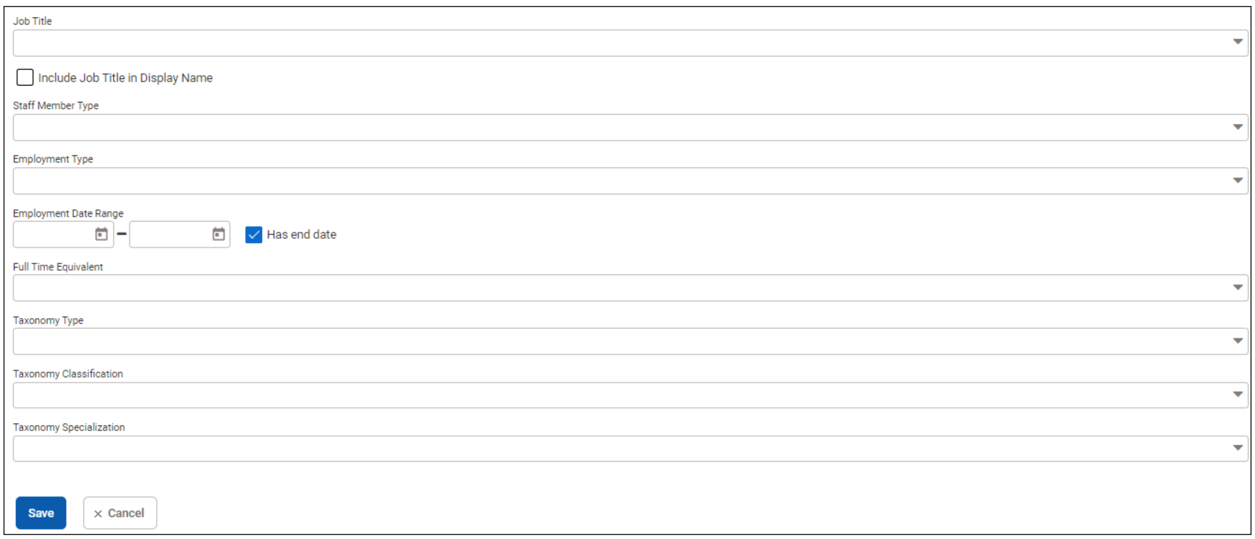



*Figure 60: Employment Profile Edit*

The fields are described below.

*Table 7: Employment Profile*

| Field | Description |
|---|---|
| Job Title | The user's job title at the agency. |
| Include Job Title in Display Name | Checking this box will show their title anywhere their name displays. |
| Staff Member Type | The user's role at the agency. |
| Employment Type | Identifies the user's employment type further (intern, contractors, volunteers, permanent, etc.) |
| Employment Date Range | • This is the Employment Date Range.<br>• The first box is the start date.<br>• The second is the user's termination date (in instances of temporary hires). This can be left blank for permanent employees.<br>Has end date field can be unchecked for permanent employees. |

| Field | Description |
| --- | --- |
| Full Time Equivalent | Denotes whether the employee is full or part time. |
| Taxonomy Type | • Related to healthcare practitioners and identifies their healthcare field.<br>• If this field is set, then Taxonomy Classification becomes a required field. |
| Taxonomy Classification | • Taxonomy Type must be set first.<br>• The taxonomy code related to their healthcare profession. |
| Taxonomy Specialization | • Taxonomy Classification must be set first.<br>• Specialization code related to the selected classification. |

Click **+Add Relationships** in the Employment Profile section to identify users that are related in some capacity.

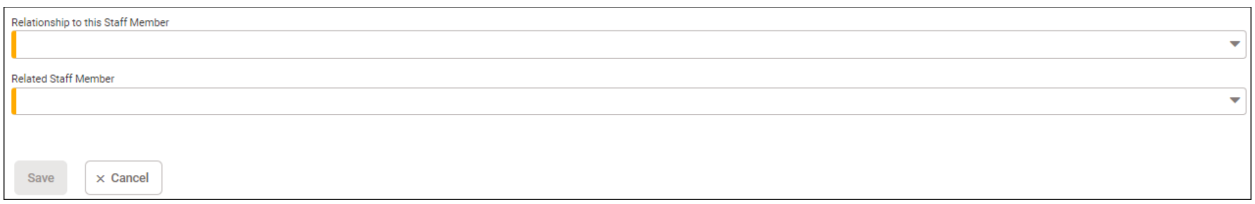



*Figure 61: Add Relationships*

There are two fields that will need to be entered.

- Relationship to this Staff Member – The relationship between staff members (wife, husband, sister, brother, etc.).
- Related Staff Member – Identifies the related staff member.
    - The related staff member must have a user account in WITS at the same agency.

### 4.3.2.3. User Account

This is where a user's account is created to allow them access to WITS. Once the account is created, additional fields and options become available.

- Reset Credentials – Selecting this option will send an email to the user prompting them to reset the login credentials.
- Lock Agency Access – This blocks the user's access to the WITS application.
    - When selected, the admin will be prompted to enter a Lock Reason.
- System Roles – Assigned system specific roles display here.
    - These roles can only be assigned by WITS administrators.
- Agency Roles – Assigned agency specific roles display here.
    - +Manage Roles – This is selected to add agency specific roles to the user.

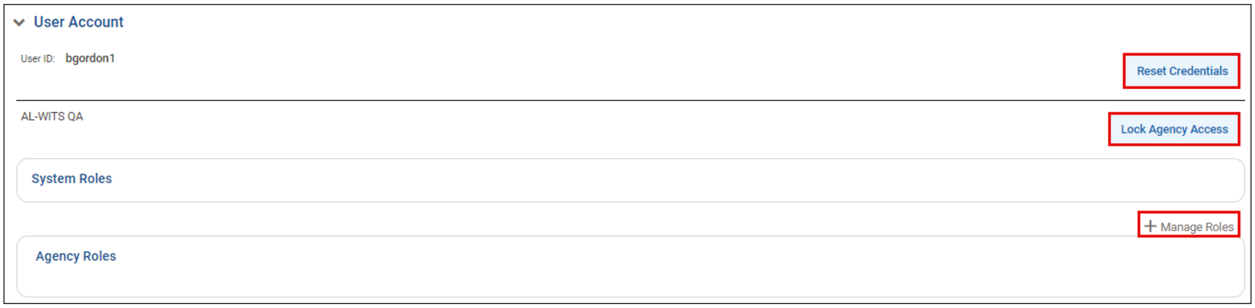



*Figure 62: User Account Options*

### 4.3.2.4. Contact Information

Information related to contacting the user is captured here. This section does not display until **Add Email**, **Add Phone Number**, or **Add Address** is clicked from the Additional Items list to the right of the Staff Member Workspace.


*Figure 63: Contact Information*

Preferred Contact Method – denotes how the user prefers to be contacted. It can be set by selecting the Pencil icon.

**+Add Email Address**

- Allows email addresses to be added to the user account.
- Multiple email addresses can be added.
- Primary box identifies that email address as the primary account. This is where system emails will be sent.


*Figure 64: Email Address*

**+Add Phone Numbers**

- Allows phone numbers to be added to the user account.
- Multiple numbers can be added.
- Type – Denotes the type of number (home, mobile, emergency, etc.)
- Primary box identifies that phone number as the primary number.

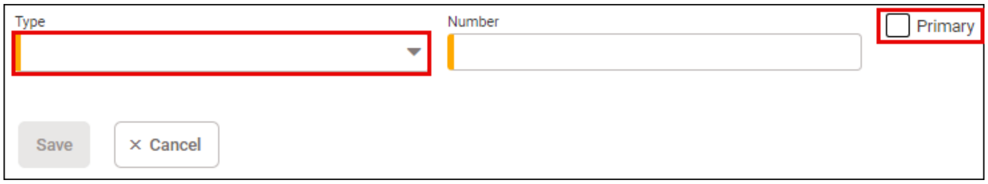



*Figure 65: Phone Number*

**+Add Physical Addresses**

- Allows user's physical address to be added to their account.
- Multiple addresses can be added.
- Type – Denotes the type of address (home, work, current, etc.)
- Confidential box will hide the address information from showing anywhere in the system.
- Validate Address – When selected, the address is checked through usps.com for validity.

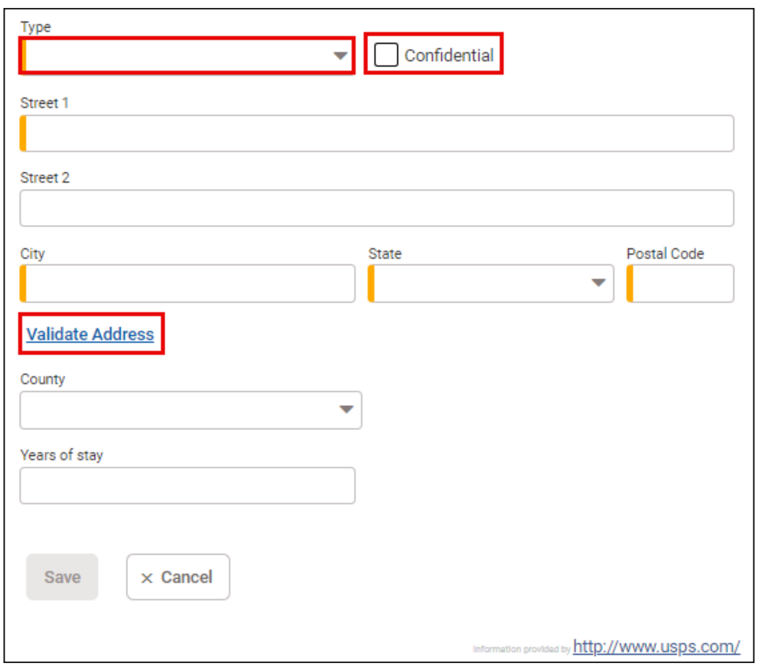



*Figure 66: Physical Address*

### 4.3.2.5. Domains

Domains assigned to the user displays here. By default, the domains assigned to the agency are assigned to the user.

- Pencil icon – Allows editing of the assigned domain.
- Trashcan icon – Removes the assigned domain from the user's account.
- +Add Domain – Selected to add additional domains to a user's account.
    - Only domains assigned to the agency can be added.


*Figure 67: Domains*

### 4.3.2.6. Facility Assignments

This must be set for agency users before they are able to access specific agency locations. This section does not display until **Add Facility Assignment** is clicked from the Additional Items list to the right of the Staff Member Workspace.

- Assigned facilities can be edited or deleted by selecting the pencil or trashcan icon, respectively.
- An assigned facility can then have program assignments added by clicking **+Add Program Assignment**.
- Additional facilities can be assigned to a user by clicking **+Add Facility Assignments**.

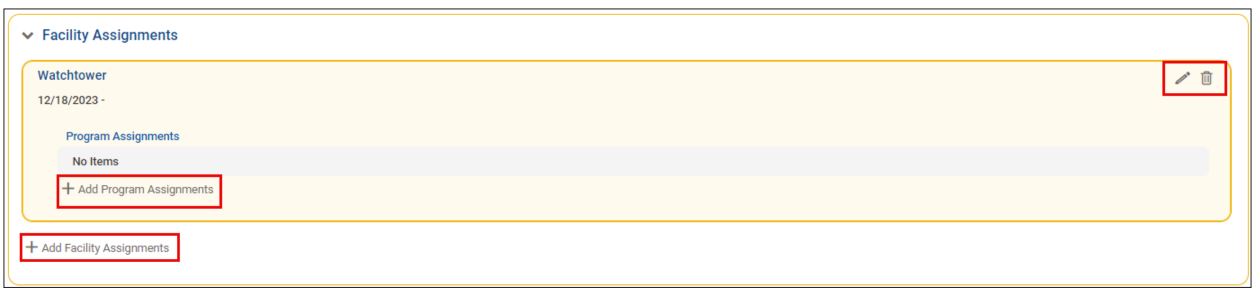



*Figure 68: Facility Assignments*

Program Assignments identifies what programs are assigned to the user at the selected facility.

**NOTE:** Setting this is optional.

- Program – Only programs available for the facility will show in this dropdown.
- Effective Dates – If effective dates are set, the user will only have program access within the set dates.
- Has end date – Uncheck this if there is no end date for a user's access to the program.
- Hours/Week – The number of hours per week the user works within that program.


*Figure 69: Program Assignments*

**+Add Facility Assignments** opens the window below.

- Available facilities will display in the first Facilities column.
- When selected, the facility moves to the second column.
- Effective Date – Denotes when the user gains and loses access to the facility.
    - Has end date can be unchecked if the user should always have access to the facility.

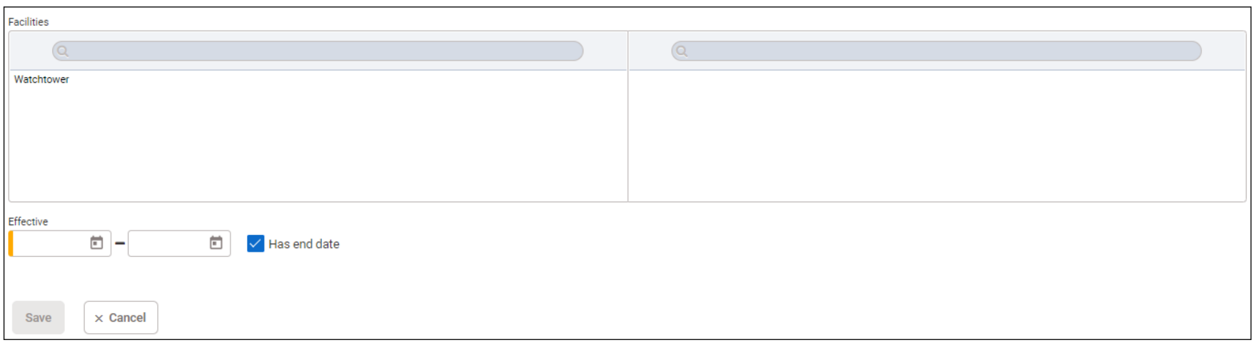



*Figure 70: Add Facility Assignment*

### 4.3.2.7. Professional Qualifications

This section can be used to capture certifications, degrees, and licenses. This section does not display until **Add Professional Qualifications** is clicked from the Additional Items list to the right of the Staff Member Workspace.

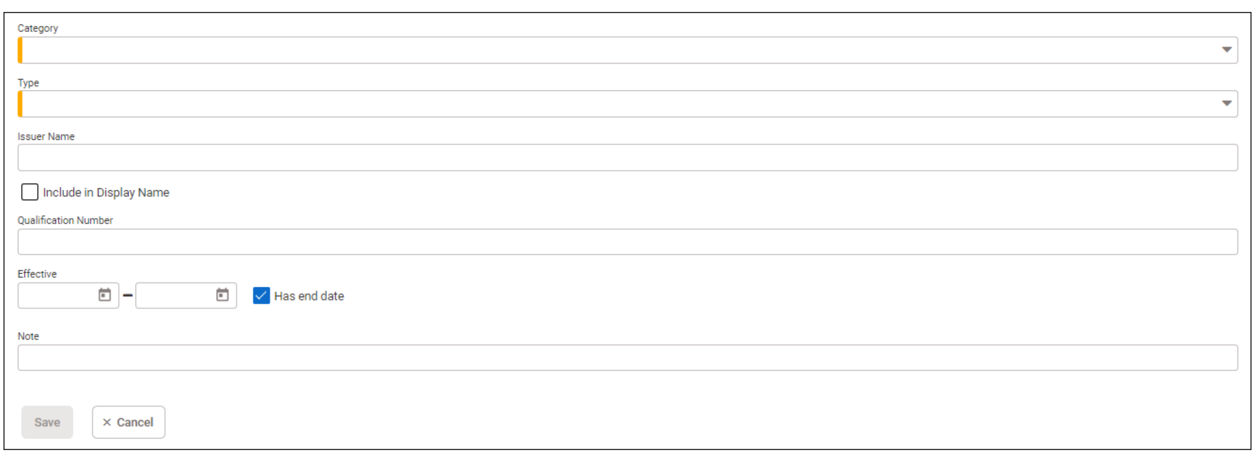



*Figure 71: Professional Qualifications*

Information on the different fields can be found in the table below.

*Table 8: Professional Qualifications*

| Field | Description |
|---|---|
| Category | The qualification type (certification, degree, license). |
| Type | Further defines the qualification (type of degree, certification, or license). |
| Issuer Name | The name of the organization that administered the qualification. |
| Include in Display Name | When checked, the qualification will display wherever the user's name displays. |
| Qualification Number | If the qualification has an identifier code, enter it here. |
| Effective Dates | When the qualification was bestowed and when it expires (if at all). |
| Has end date | Uncheck if there is no expiration date for the qualification. |
| Note | Optional notes that can be added. |

### 4.3.2.8. Identifiers

Various identifiers can be added a user's accounts as needed. This section does not display until **Add Identifiers** is clicked from the Additional Items list to the right of the Staff Member Workspace.

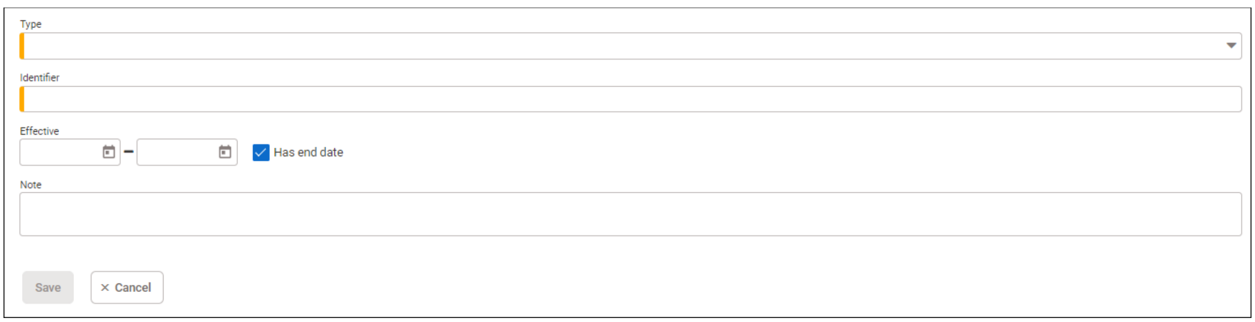



*Figure 72: Identifiers*

Information on the different fields is described in the table below.

*Table 9: Identifiers*

| Field | Description |
|---|---|
| Type | This is a dropdown of possible identifiers |
| Identifier | The alpha numerical identification code for the selected identifier type. |
| Effective Dates | The active dates for the identifier (a driver's license would have an issue and expiration date). |
| Has end date | Uncheck if there is no expiration date for the identifier. |
| Note | Optional notes that can be added. |

### 4.3.2.9. Languages

Language fluency can be captured here. This section does not display until **Add Language** is clicked from the Additional Items list to the right of the Staff Member Workspace.

- Language – Choose the language from the dropdown.
- Reading – Record the fluency from no proficiency to extremely proficient.
- Speaking – Record the fluency from no proficiency to extremely proficient.
- Writing – Record the fluency from no proficiency to extremely proficient.

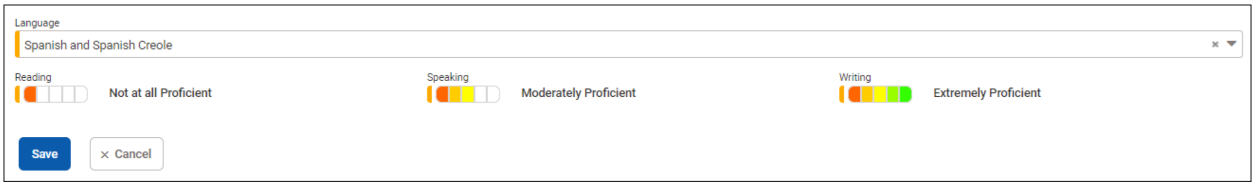



*Figure 73: Languages*

### 4.3.2.10. Checklist Items

Checklist Items are used to record tasks throughout a user's career. Examples of data that can be recorded include on boarding, periodic, and separation. This section does not display until **Add Checklist Item** is clicked from the Additional Items list to the right of the Staff Member Workspace.

- Category – The type of checklist being captured (on boarding, periodic, separation, etc.).
- Type – Different kinds of tasks that might be captured during that stage of employment. Examples include background checks, policy and procedure reviews, development plans, etc.

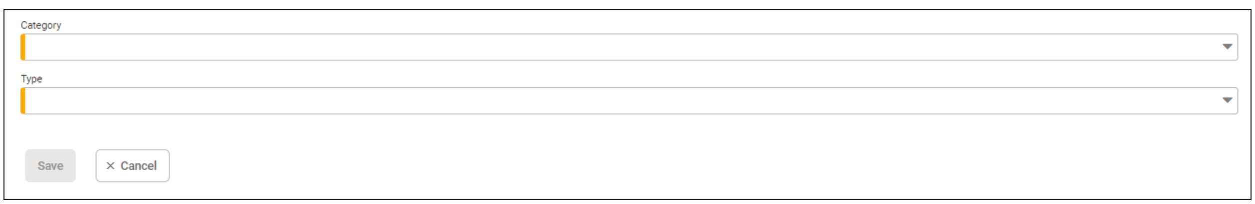



*Figure 74: Checklist Items*

Once a checklist item has been created, there are additional steps that may be required.

- Noting whether the task was completed and when.
- Deleting the task if it is no longer applicable.
- Adding and answering follow-up questions.


*Figure 75: Checklist Follow-up*

### 4.3.2.11. Training

This section is used to record training received by the user. This section does not display until **Add Training** is clicked from the Additional Items list to the right of the Staff Member Workspace.

- Training Course – The name of the course taken.
- Completed – The date the course was completed.

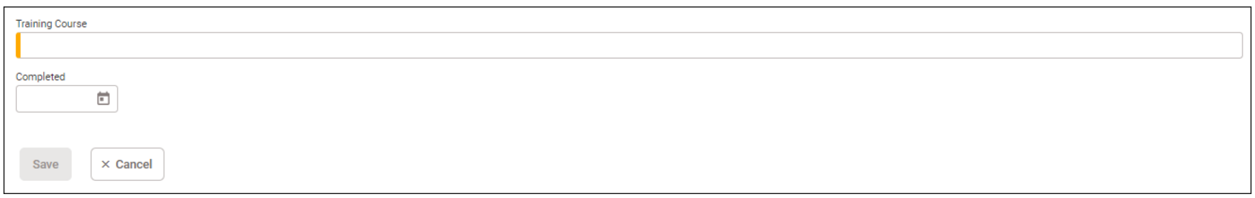



*Figure 76: Training*

### 4.3.2.12. Notes

This section is used to capture any notes relevant to the user and/or their account. This section does not display until **Add Notes** is clicked from the Additional Items list to the right of the Staff Member Workspace.

- When selected, a blank text box displays for the admin to enter information.

## 4.3.3. Staff Management Functions

This section covers information on different functions an administrator might need to perform when managing staff accounts. Click on the **vertical ellipsis** to the right of the of the staff member's name.

- Lock Agency Access – Locks the user's account. The admin will have to provide a reason for locking the account.
- Reset Credentials – Resets the user's login credentials.
- View Profile – Select this to access the user account.

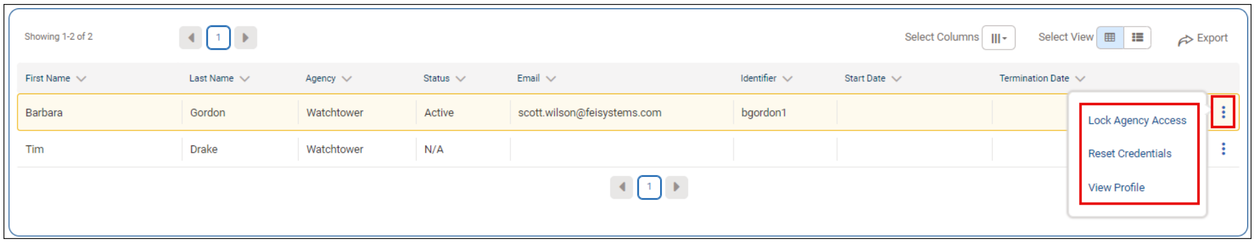



*Figure 77: User Account Actions*

- Release Agency Lock – This unlocks the user account. This is also selected when the user enters the wrong password three times.

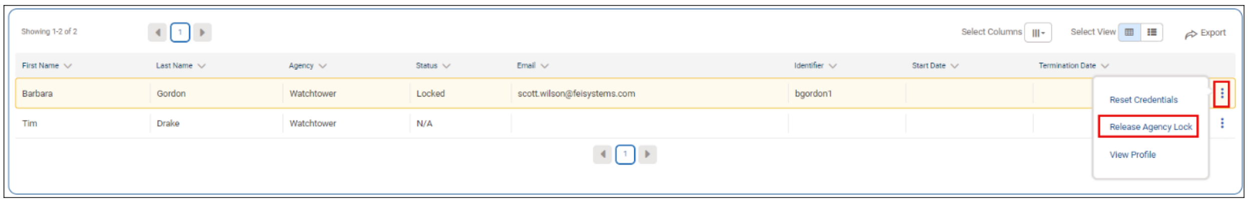



*Figure 78: Release Agency Lock*

## 4.4. Billing Management

For contracts to be fully established for a treatment agency, there is a setup in billing administration that must be completed first. Chances are that the proceeding steps will have already been performed. However, they are provided in the event a new payor plan needs to be added.

### 4.4.1. Payor Plan

The state will need to create payor plans in the ADMH agency for the following:

- Medicaid
- Third Party Liability
- Government Contracts

To create a payor plan:

1. From the left navigation menu, click **Agency**.
2. In the submenu, click **Billing**.
3. Under Billing, click **Payor Plan List**.

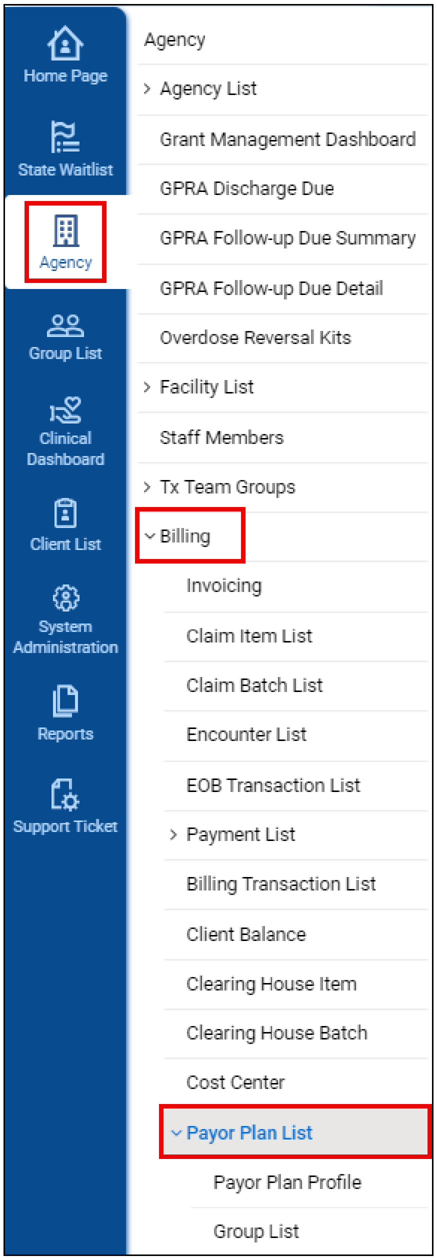



*Figure 79: Accessing Payor Plan List*

4. The Payor Plan Search screen will display.
    a. Any existing payor plans will be listed under the Payor Plan List section.
    b. If needed, a search can be performed to narrow the results.
5. Click **+Add New Payor Plan**.

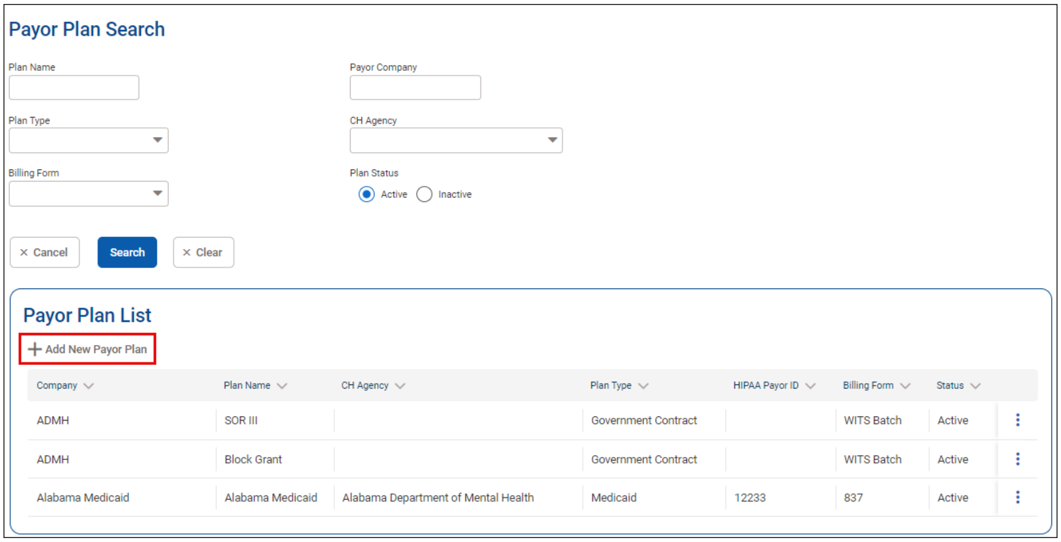



*Figure 80: Add Payor Plan*

6. The Payor Plan Profile screen will display.
    a. The fields are read-only until a Plan Type is selected from the dropdown.

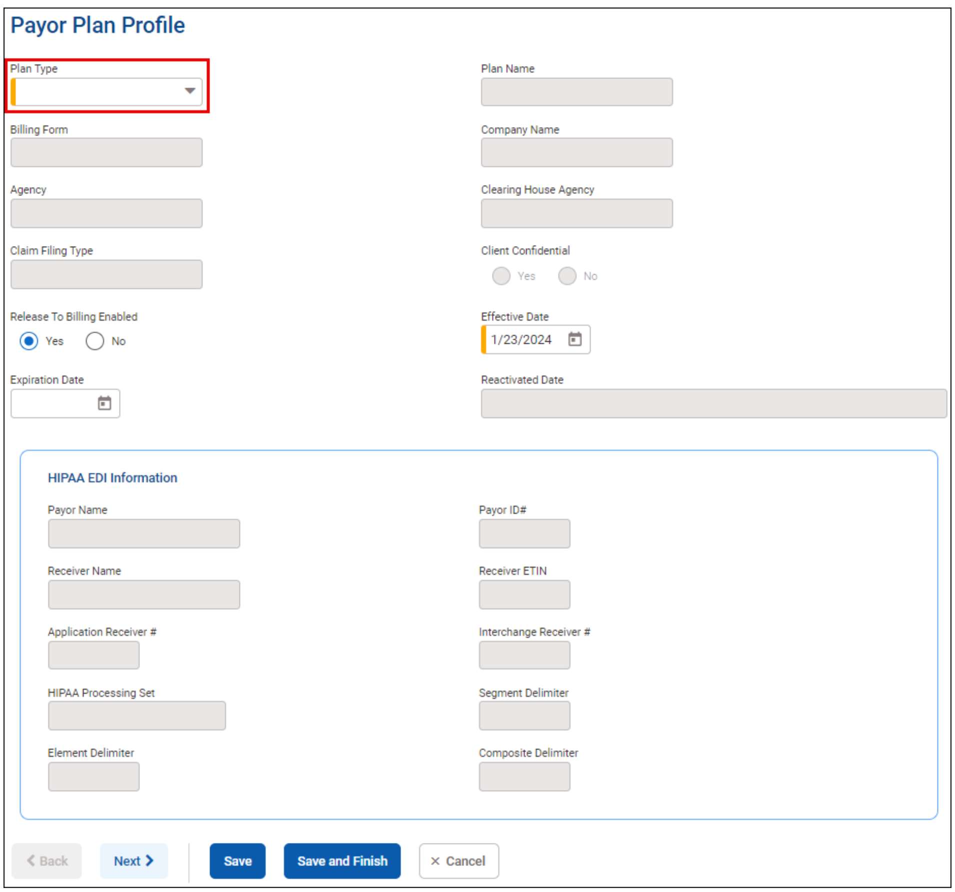



*Figure 81: Payor Plan Profile*

7. Set the **Plan Type** to make the fields on the screen editable.
8. Complete all required and relevant fields.

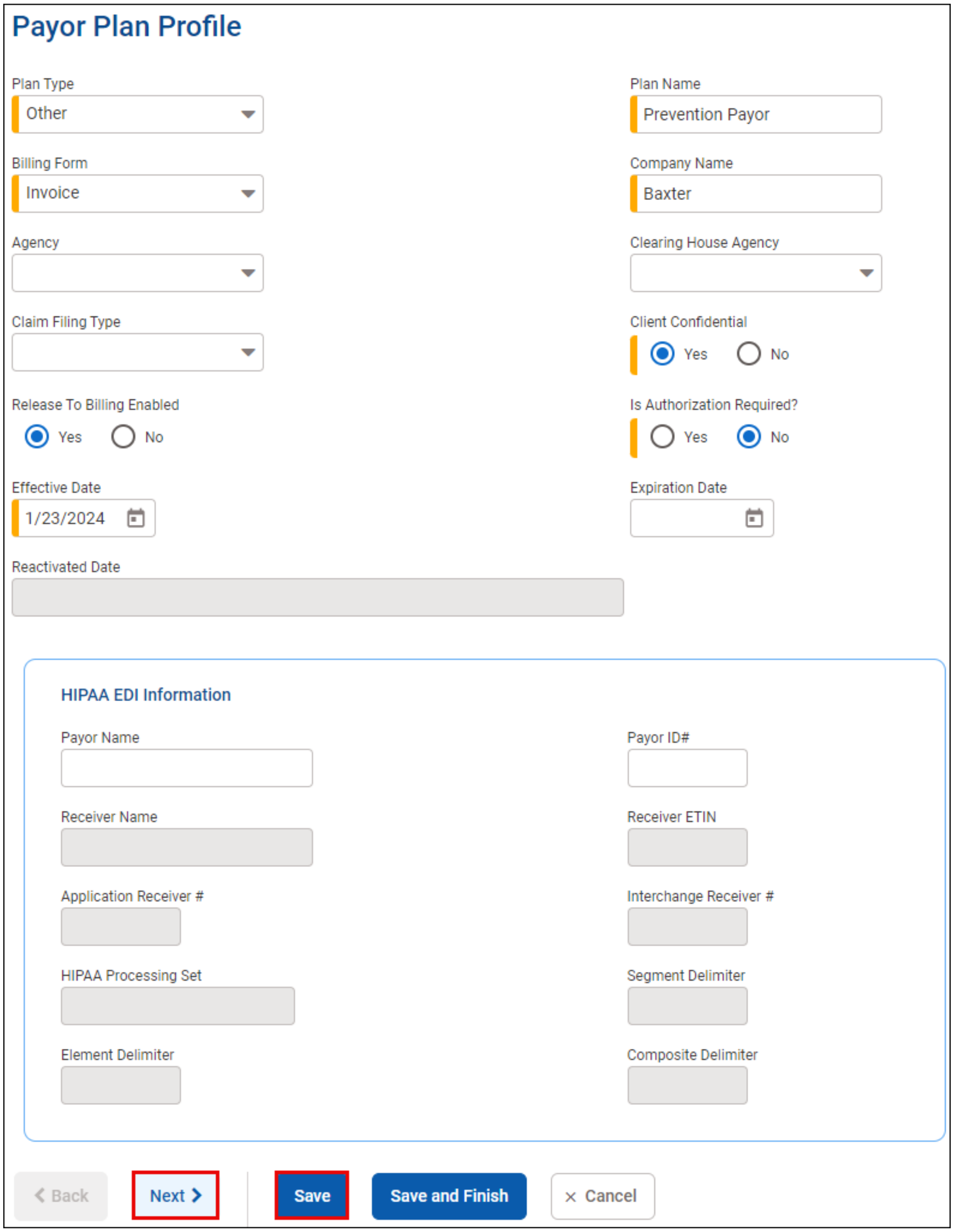



*Figure 82: Payor Plan Profile – Plan Type Set*

9. Click **Save** and then **Next**.
10. The Group List for <Plan Name> will display.

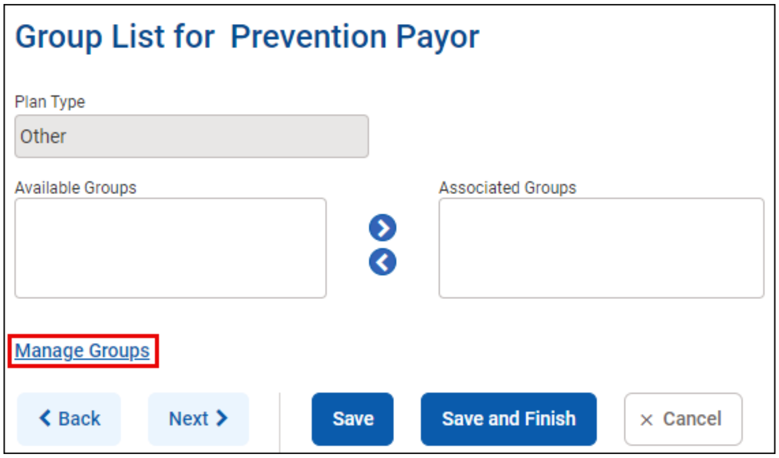



*Figure 83: Group List*

11. Click **Manage Groups** to create groups to associate with the payor plan.
12. The Group List for <Plan Name> will display.

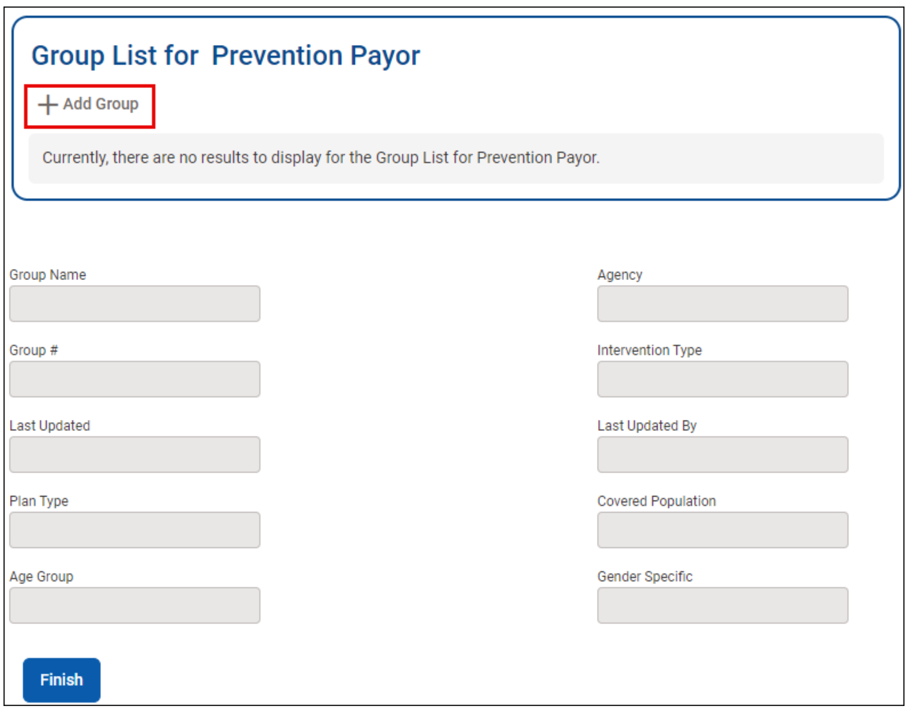



*Figure 84: Group List for Plan*

13. Click **+Add Group**.
14. Some of the read-only fields will become active based on the Plan Type.
15. Complete the required and relevant fields.

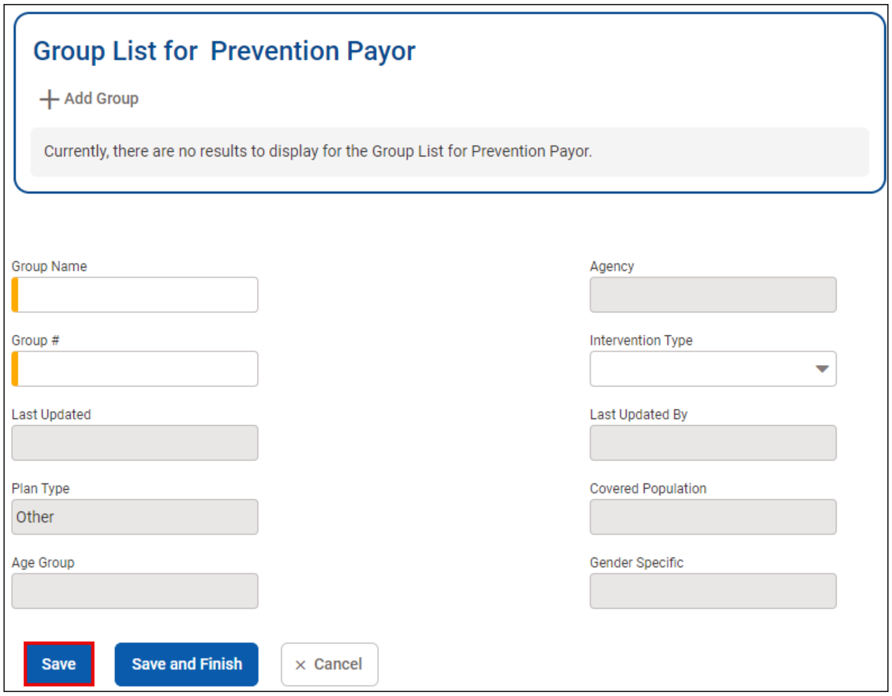



*Figure 85: Group List - Editable*

16. Click **Save**.
17. Repeat steps if another group needs to be created. Otherwise, click **Finish**.
18. Back on the Group List for <Plan Name> screen, move **Available Groups** to **Associated Groups**.

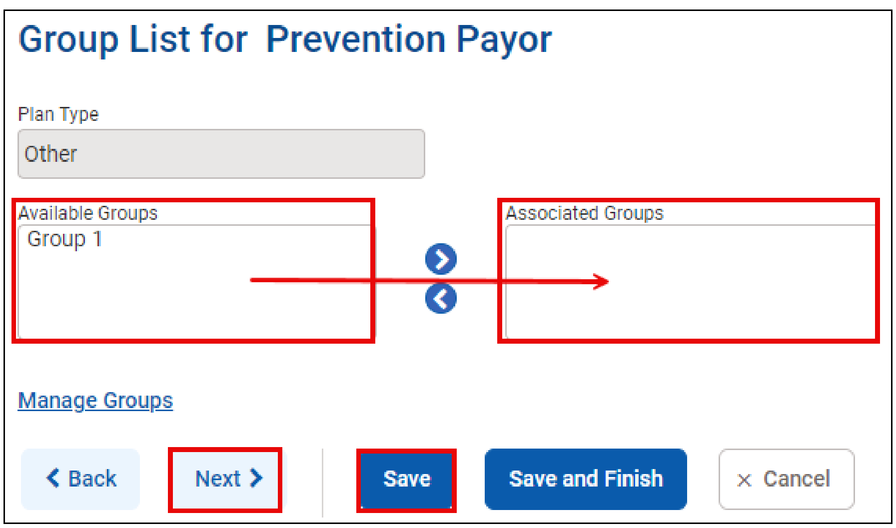



*Figure 86: Associating Groups*

19. Click **Save** and then click **Next**.
20. The Agency Profile for <Plan Name> screen will display.
21. Complete the required and relevant fields.

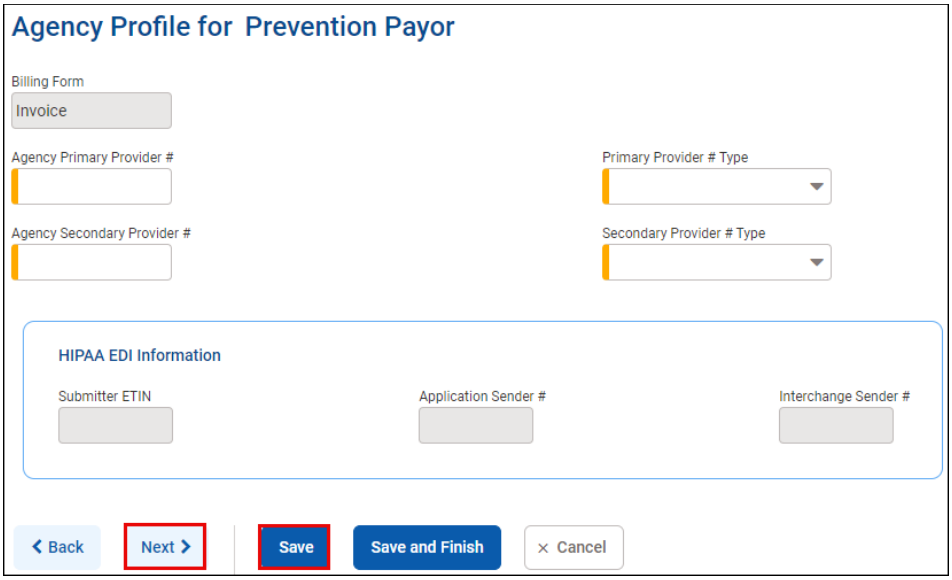



*Figure 87:Agency Profile for Plan*

22. Click **Save** and then click **Next**.
23. The Facility Profile for <Plan Name> screen will display.
24. Complete all fields.

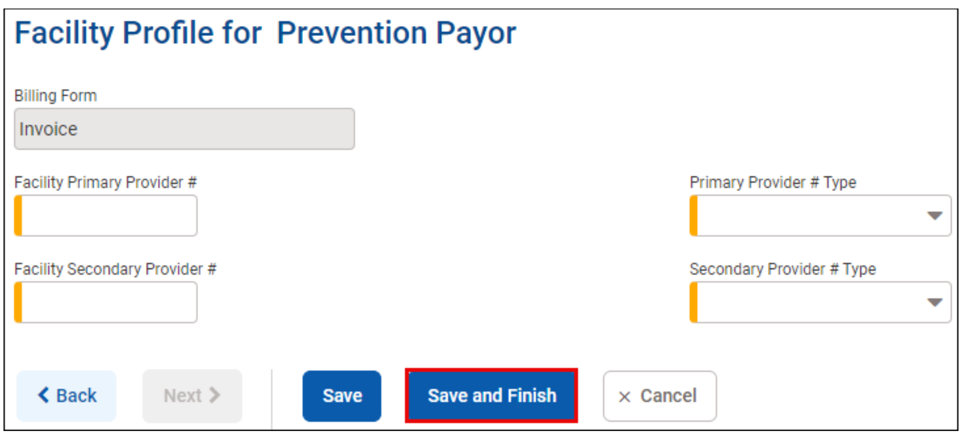



*Figure 88: Facility Profile for Plan*

25. Click **Save and Finish**.

## 4.5. Contract Management

A contract establishes a relationship between a provider agency and the state (contractor) agency. While all provider agencies may view their contracts, only contractor agencies may set up and edit contracts.

The following workflow applies to treatment agencies. For prevention administration see *WITS Prevention Administration*.

### 4.5.1. Authorization Period

Before contracts can be created for any agency, the state will need to create an authorization period.

To create an authorization period:

1. From the left Navigation Menu, click **Agency**.

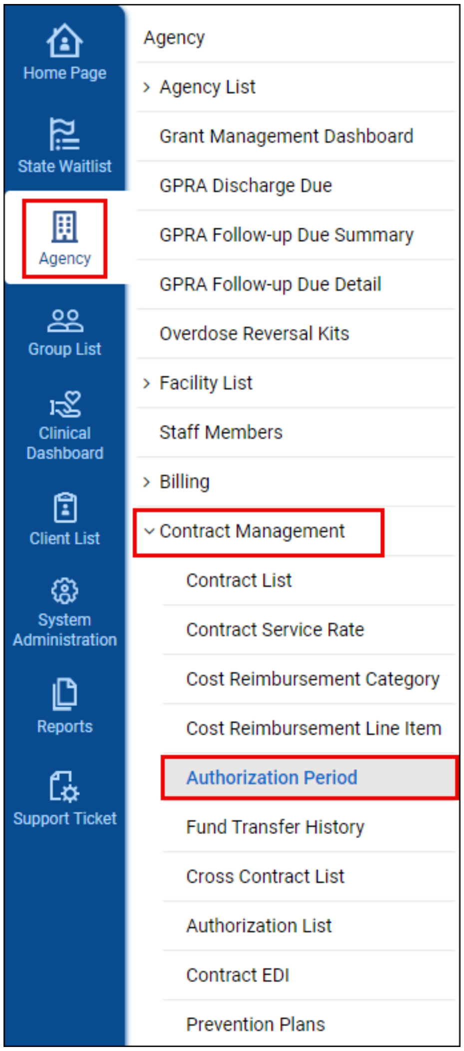



*Figure 89: Accessing Authorization Period*

2. In the sub-menu, click **Contract Management** and then click **Authorization Period**.
3. The Authorization Period List displays.
    a. Existing periods will be listed here.

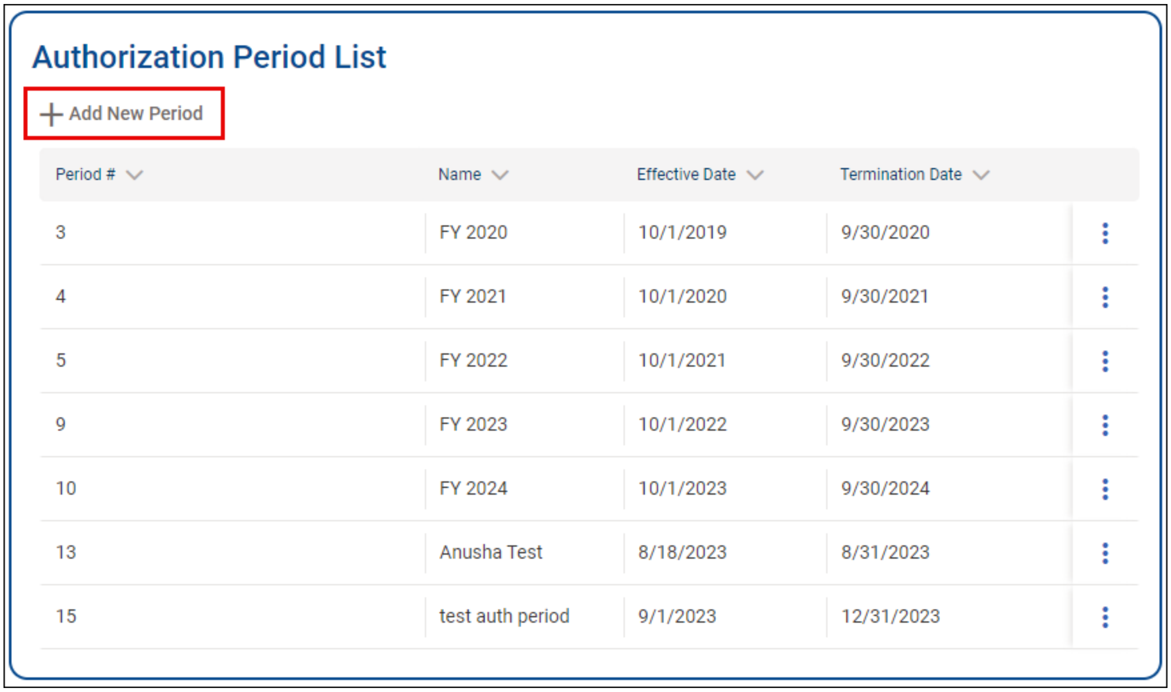



*Figure 90: Authorization Period*

4. Click **+Add New Period**.
5. On the Authorization Period Profile screen, complete the required fields.

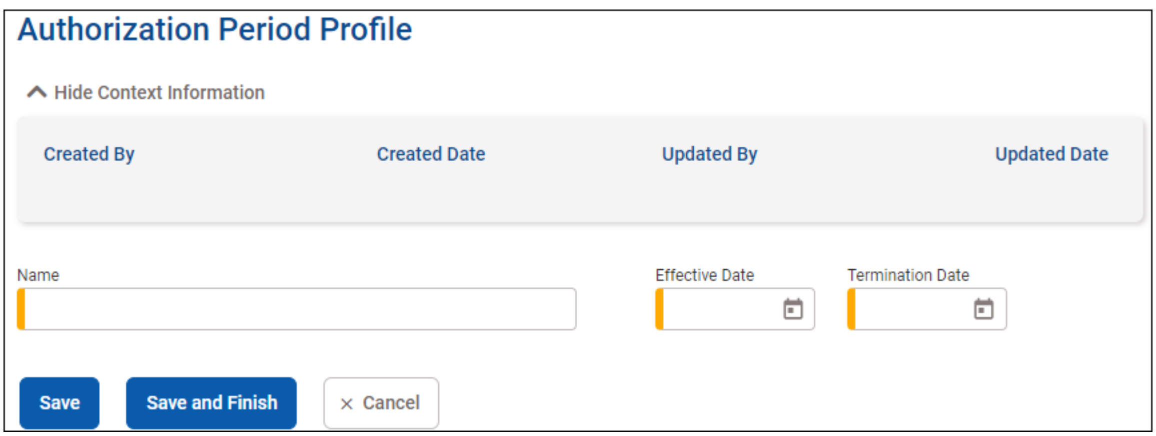



*Figure 91: Authorization Period Profile*

6. Click **Save and Finish**.

### 4.5.2. Contract Creation

Contract creation is essential. The state will need to complete the following steps within the state (contractor) agency for each provider offering services to clients.

**NOTE:** Before creating a contract, the state administrator must be accessing the state (contractor) agency.

To add a contract to the state agency:

1. Click **Agency** from the left Navigation Menu.

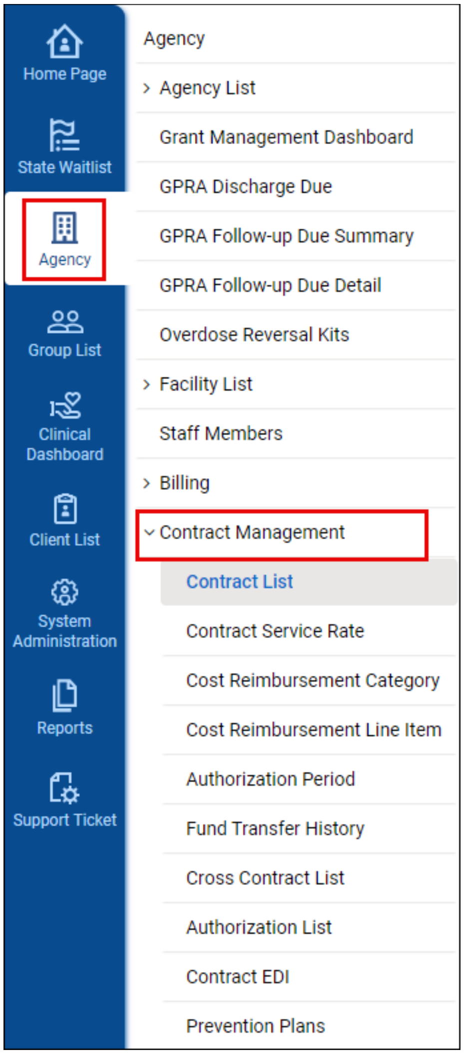



*Figure 92: Contract Management*

2. In the sub-menu, click **Contract Management**.
3. The Contract Search screen displays.
    a. The user can search for existing contracts that will display in the Contract List.

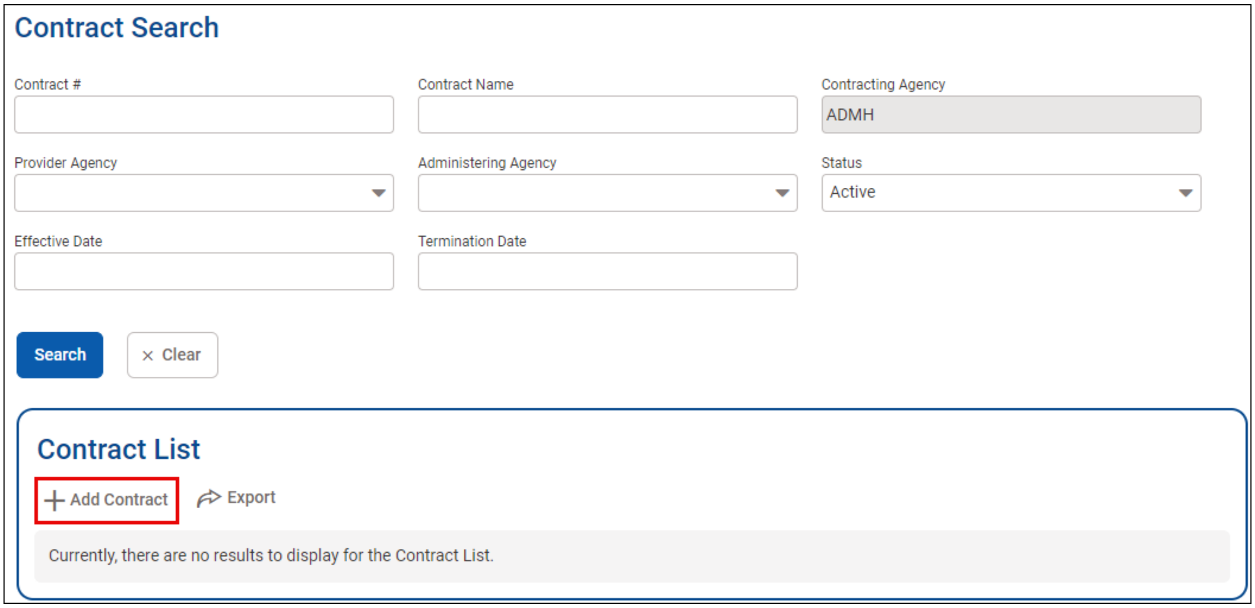



*Figure 93: Add Contract*

4. Under the Contract List section, click **+Add Contract**.
5. Complete the required fields and any other relevant fields.
    a. Domains should include Treatment.
    b. Contracting Agency will display the state's contractor agency.

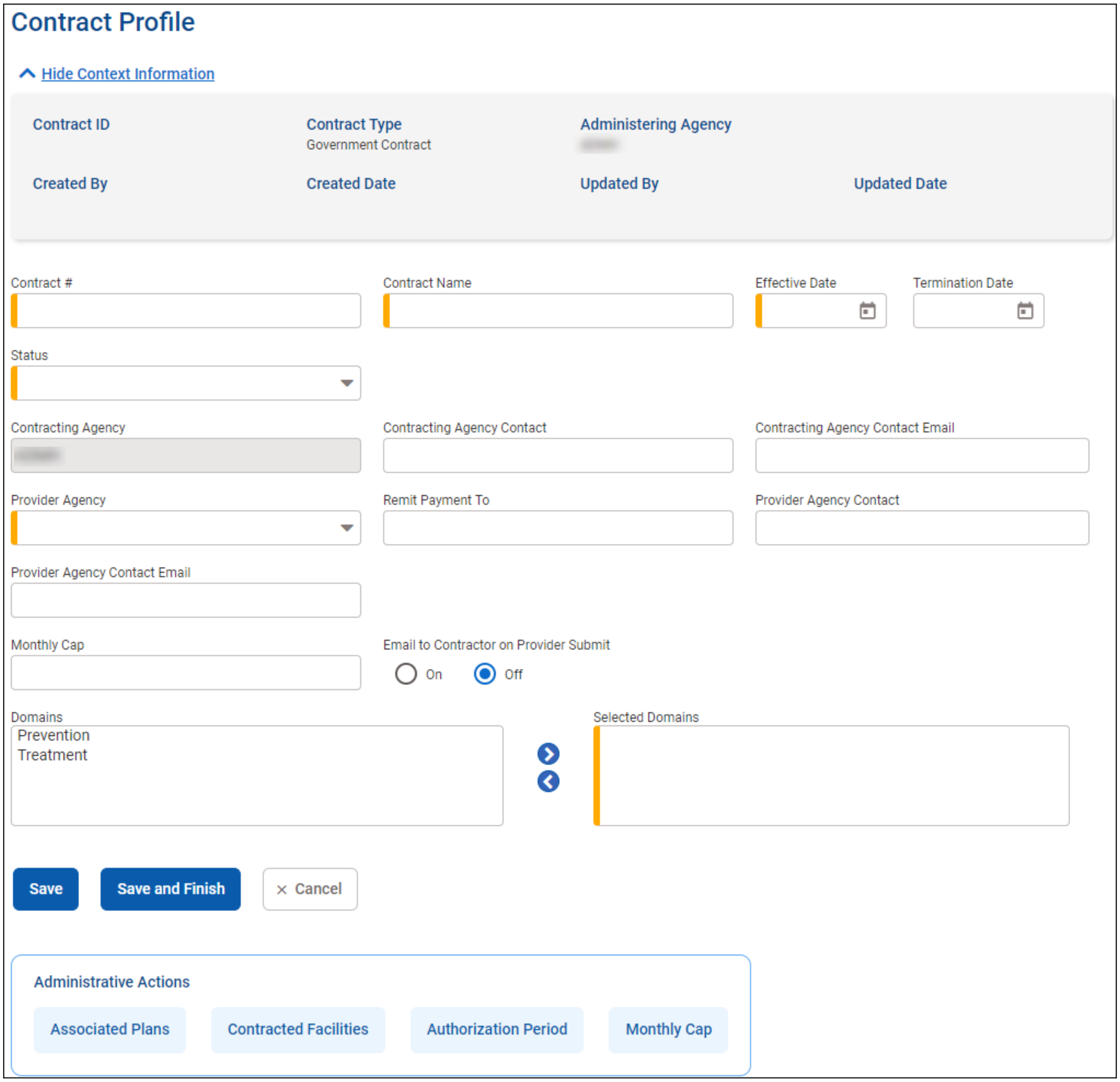



*Figure 94: Contract Profile*

6. Click **Save**.

### 4.5.3. Contract Management

**NOTE:** This section needs to be completed for all treatment providers.

Once the contract has been created, there next steps need to be completed before a provider will be able to submit claims for reimbursement.

1. Return to the provider’s contract.
    a. **Agency** > **Contract Management**
    b. Search for the contract.

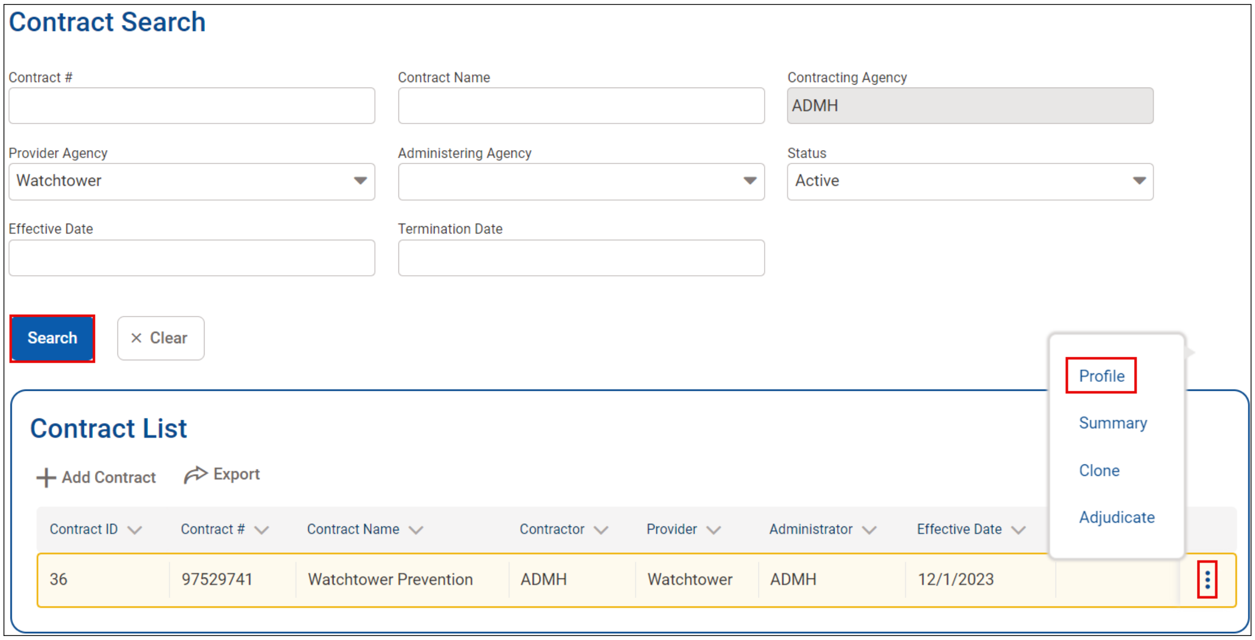



*Figure 95: Contract Search*

2. To the right of the contract, click the **vertical ellipsis** and then click **Profile**.
3. The first action that needs to be taken is associating a payor plan to the contract.

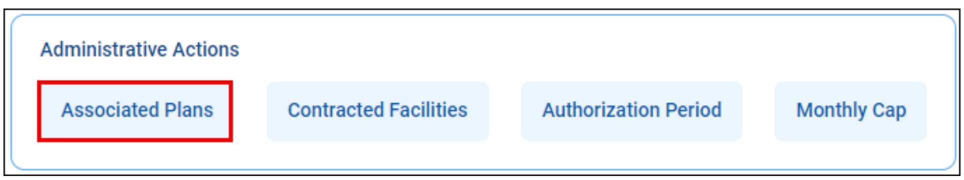



*Figure 96: Associated Plans*

4. Under Administrative Actions at the bottom of the Contract Profile, click **Associated Plans**.
5. The Contract-Plan List screen displays.

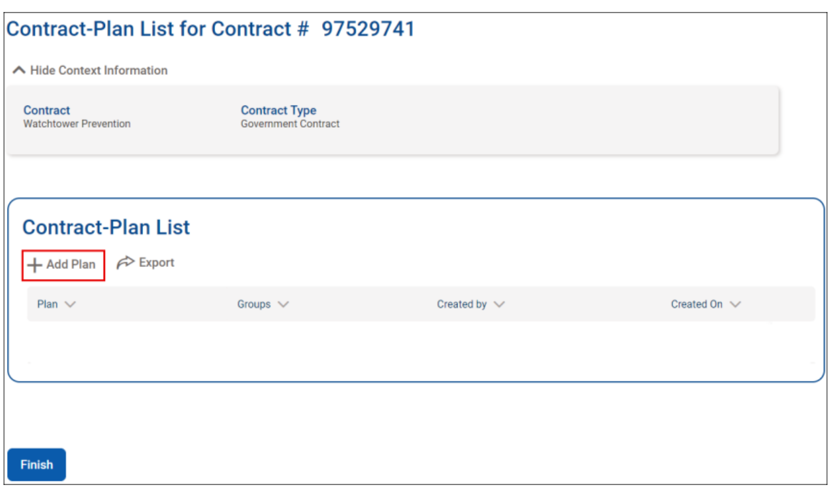



*Figure 97: Contract-Plan List*

6. Click **+Add Plan**.
7. The Plan dropdown displays. Select the Government Contract plan to be associated with the contract.
    a. The plans available in dropdown are setup under Payor Plan.
    b. More than one plan can be added to a contract.

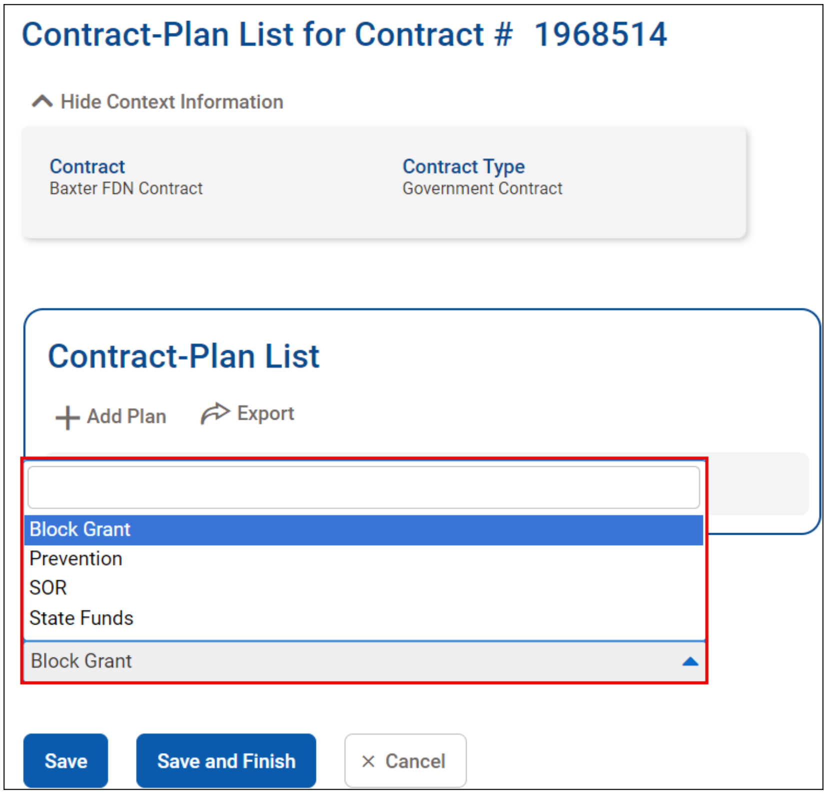



*Figure 98: Contract-Plan List*

8. Click **Save**.
9. If more than one plan needs to be added, continue adding until all relevant plans are added to the contract.
10. Each plan then needs to have group(s) assigned.

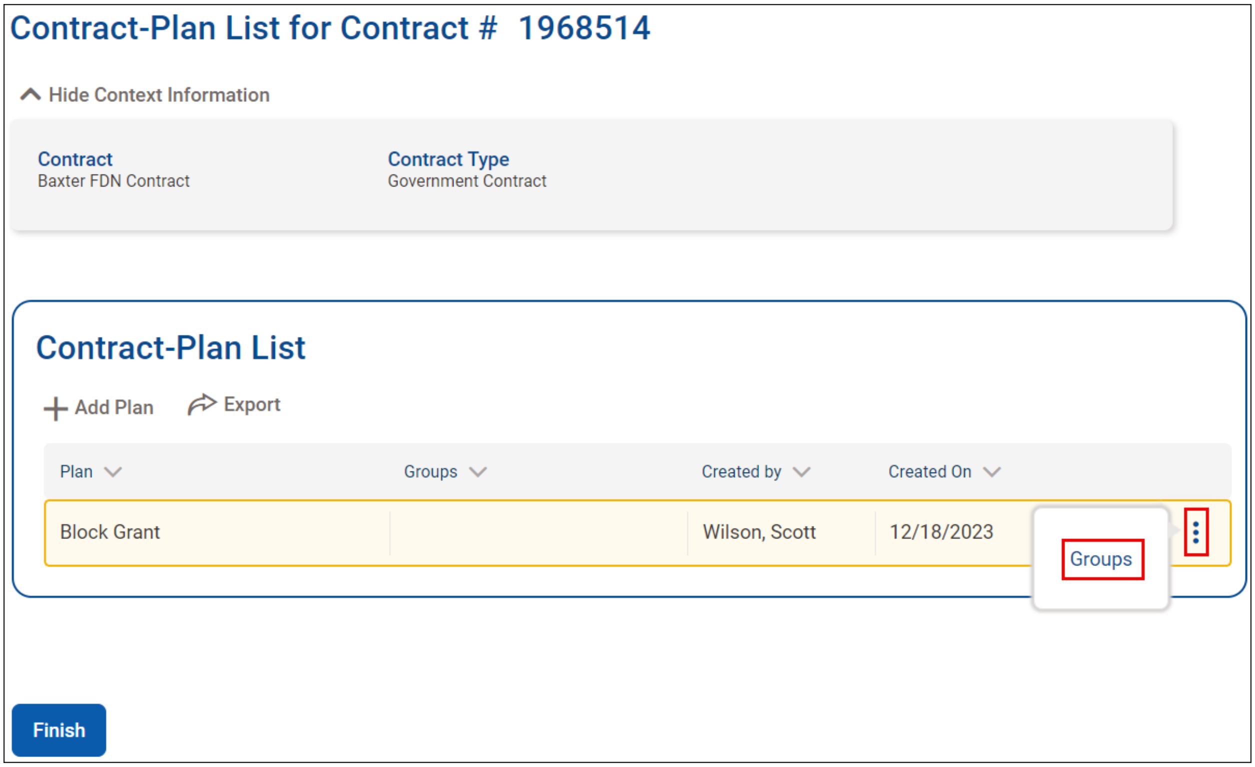



*Figure 99: Adding Groups*

11. To the right of the plan, click the **vertical ellipsis**, and then click **Groups**.
12. The Contract-Plan-Group List screen displays.

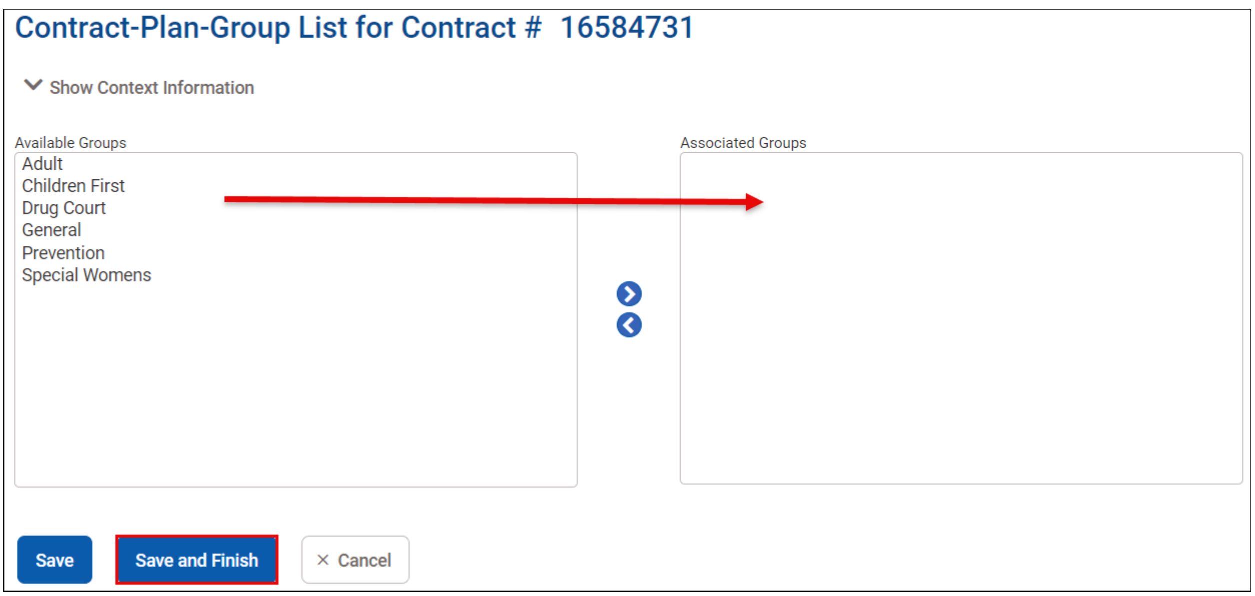



*Figure 100: Contract-Plan-Group List*

13. Move groups from the Available Groups to Associated Groups.
    a. More than one group can be added to the selected plan.

14. Click **Save and Finish**.
15. Click **Finish** to be returned to the Contract Profile.
16. Under Administrative Actions, click **Contracted Facilities**.


*Figure 101: Contracted Facilities*

17. The Contract-Facility List screen will display for the current Contract #.
18. Move facilities associated with the contract to the **Facilities Covered under Contract** section.

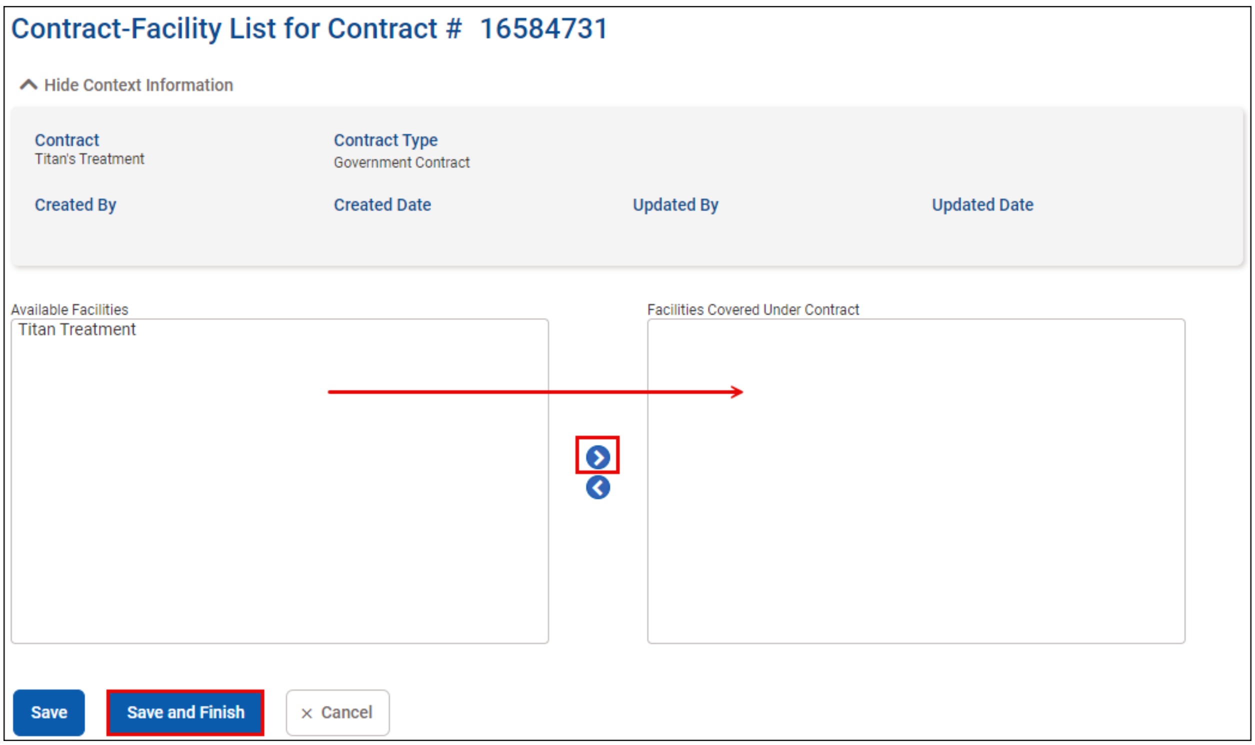



*Figure 102: Contract Facility*

19. Click **Save and Finish**.
20. Under Administrative Actions at the bottom of the Contract Profile, click **Authorization Period**.

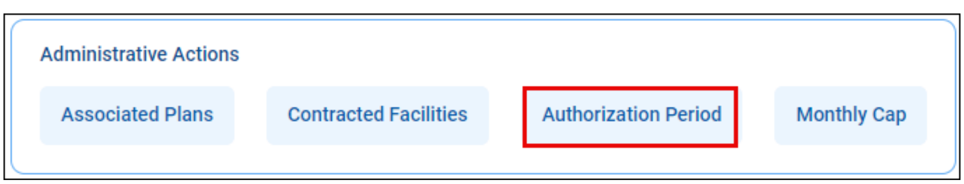



*Figure 103: Authorization Period*

21. The Contract Authorization Period screen displays.
    a. Any existing periods will display under Authorization Period List.


*Figure 104: Authorization Period List*

22. Under Authorization Period List, click **+Add New Period**.
23. Below the Authorization Period List, Contract Authorization Period Profile will display.
24. Complete the required fields and provide an Authorization # if needed.
    a. Authorization Period – Any periods that have been created under Authorization Period will display here.
    b. Effective Date – This must match the contract's start date.
    c. Termination Date – This date cannot exceed the Authorization Period's end date.
    d. Claim Filing Cutoff Date – This is the last day that claims can be submitted for reimbursement.
    e. Fiscal Year Contract ID – The state created ID for the provider for the fiscal year.

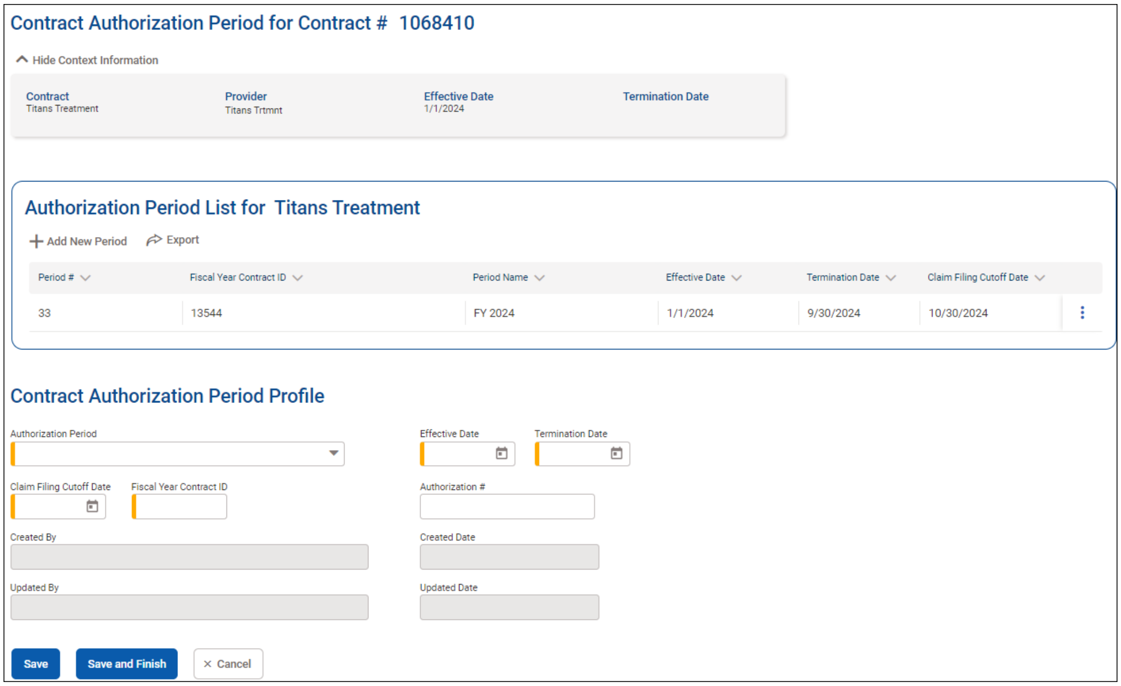



*Figure 105: Contract Authorization Period Profile*

25. Click **Save**.

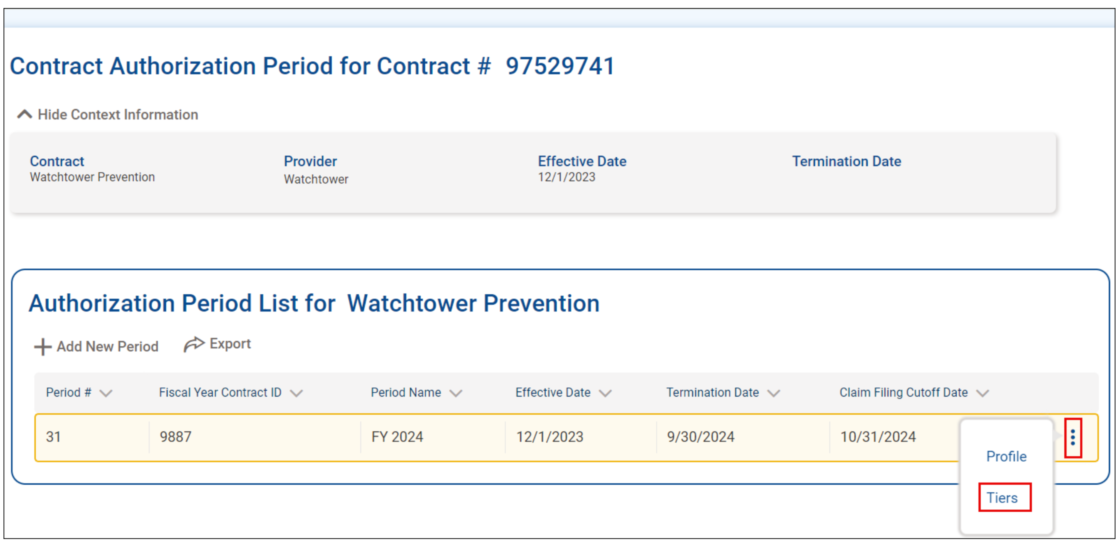



*Figure 106: Authorization Period Tiers*

26. To the right of the new period, click the **vertical ellipsis**, and then click **Tiers**.
27. The Contract Tier Management screen displays.
    a. Existing tiers display in the Tire for Authorization Period section.


*Figure 107: Add New Tier*

28. Click **+Add New Tier**.
29. The Tier Profile section displays under Tier for Authorization Period.
30. Complete the required fields.
    a. Tier Type needs to be set to Fee for Service.
    b. See table Tier Profile for information on the different fields.

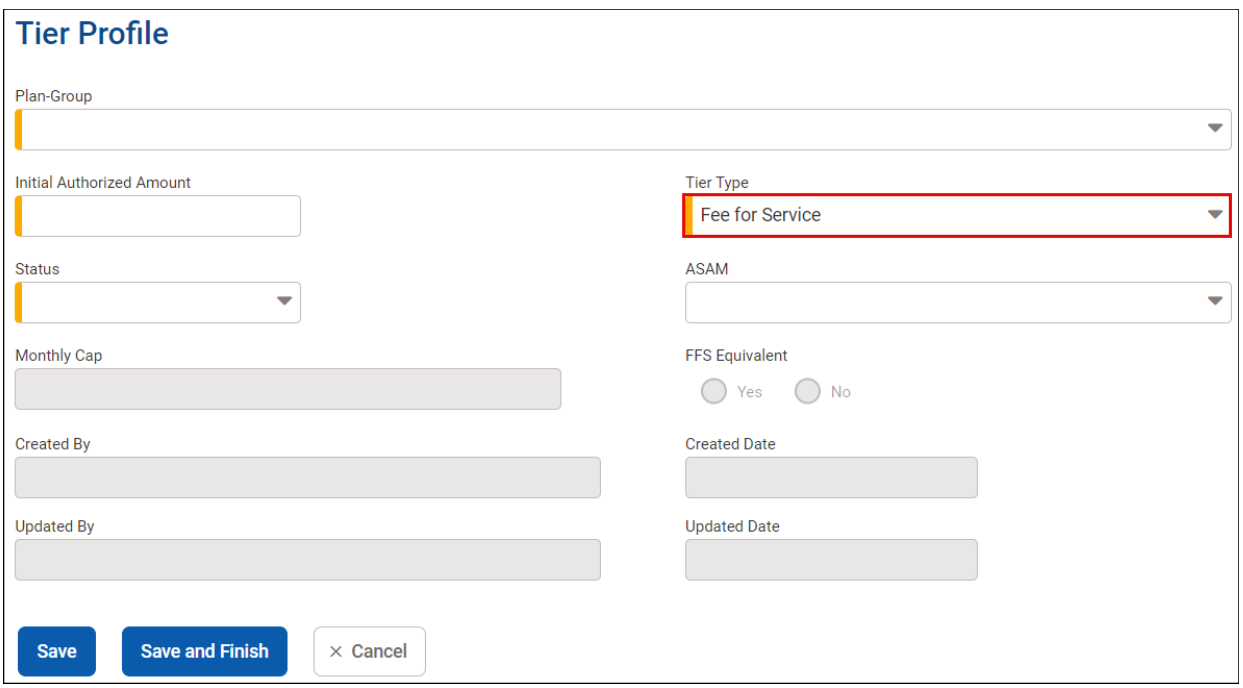



*Figure 108: Tier Profile*

31. Click **Save and Finish**.

*Table 10: Tier Profile*

| Field | Description |
|---|---|
| Plan-Group | This is the associated plan-group that was setup under Associated Plans. |
| Initial Authorized Amount | This is the amount for use by the provider for the designated authorization period. |
| Tier Type | This should be set to Fee for Service. |
| Status | The status of the selected tier to Active |
| ASAM | This dropdown will list the different levels of care. This only needs to be set if the tier is being limited.<br>**NOTE:** This field is not used for Alabama. |
| Monthly Cap | Is the monthly cap a fixed or variable amount. For Alabama, this should be set to Variable. |
| FFS Equivalent | The fee for service equivalent. This is set to No for Alabama. |

32. Click **Finish** to be returned to the Contract Authorization Period screen.
33. Click **Finish** again to be returned to the Contract Profile screen.
34. Click **Save and Finish** to finalize all changes and leave the contract.

### 4.5.4. Contract Service Rate

Contract Service rate allows the state to modify or remove a service rate for a particular provider.

To set a contract service rate:

1. From the left Navigation Menu, click **Agency**.
2. Click **Contract Management** in the sub-menu to expand it and show additional menu items.

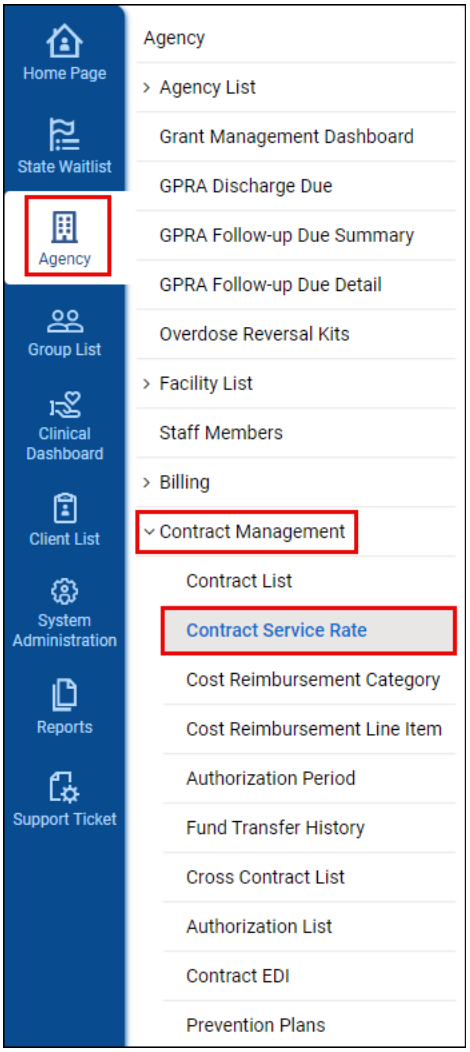



*Figure 109: Contract Service Rate*

3. Click **Contract Service Rate**.
4. The Contract Service Rate Search screen will display.
    a. The user can search for existing rates, which will display in the Contract Service Rate List.

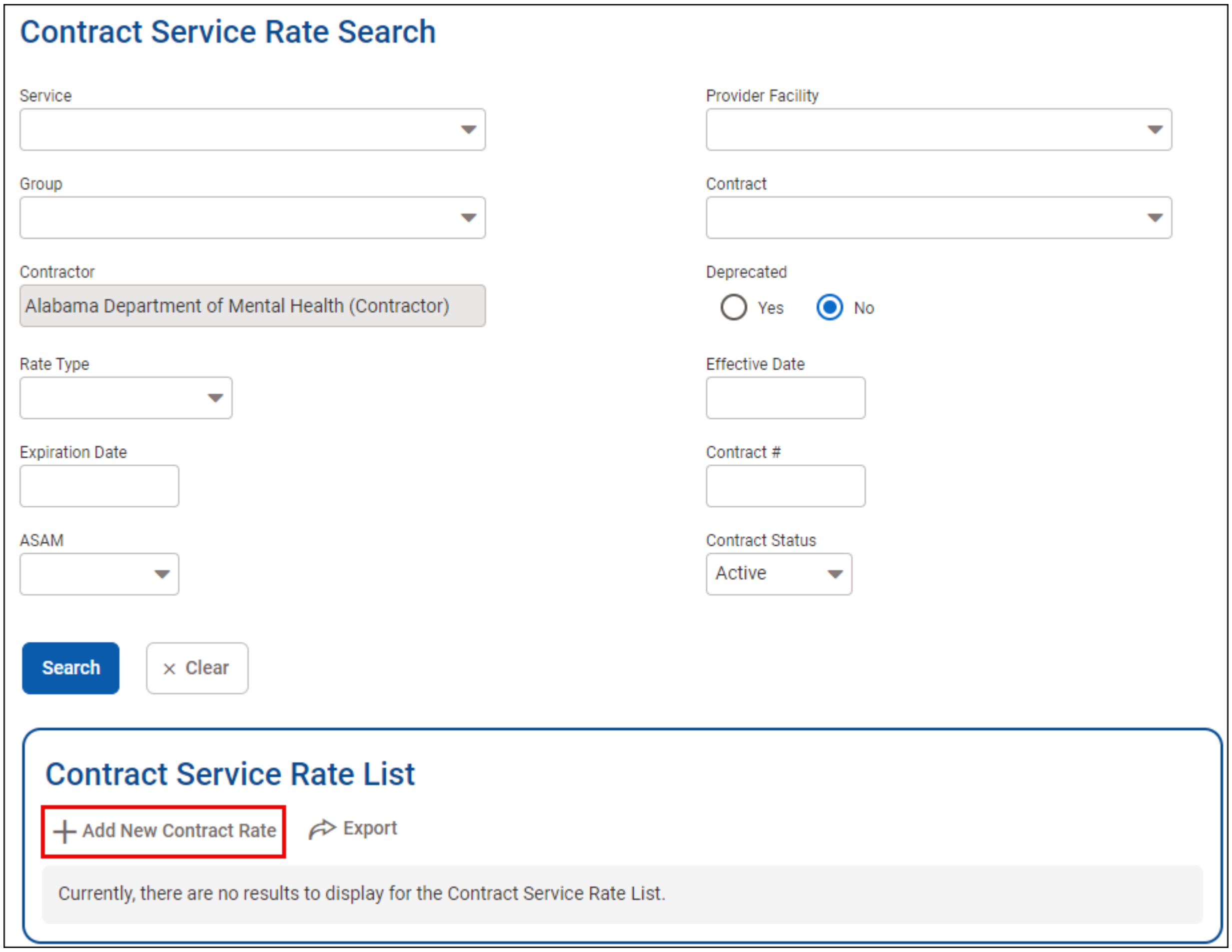



*Figure 110: Contract Service Rate Search*

5. Under Contract Service Rate List, click **+Add New Contract Rate**.
6. Complete the required fields and any other relevant fields.
    a. For information on the different fields, see table Contract Service Rate below.

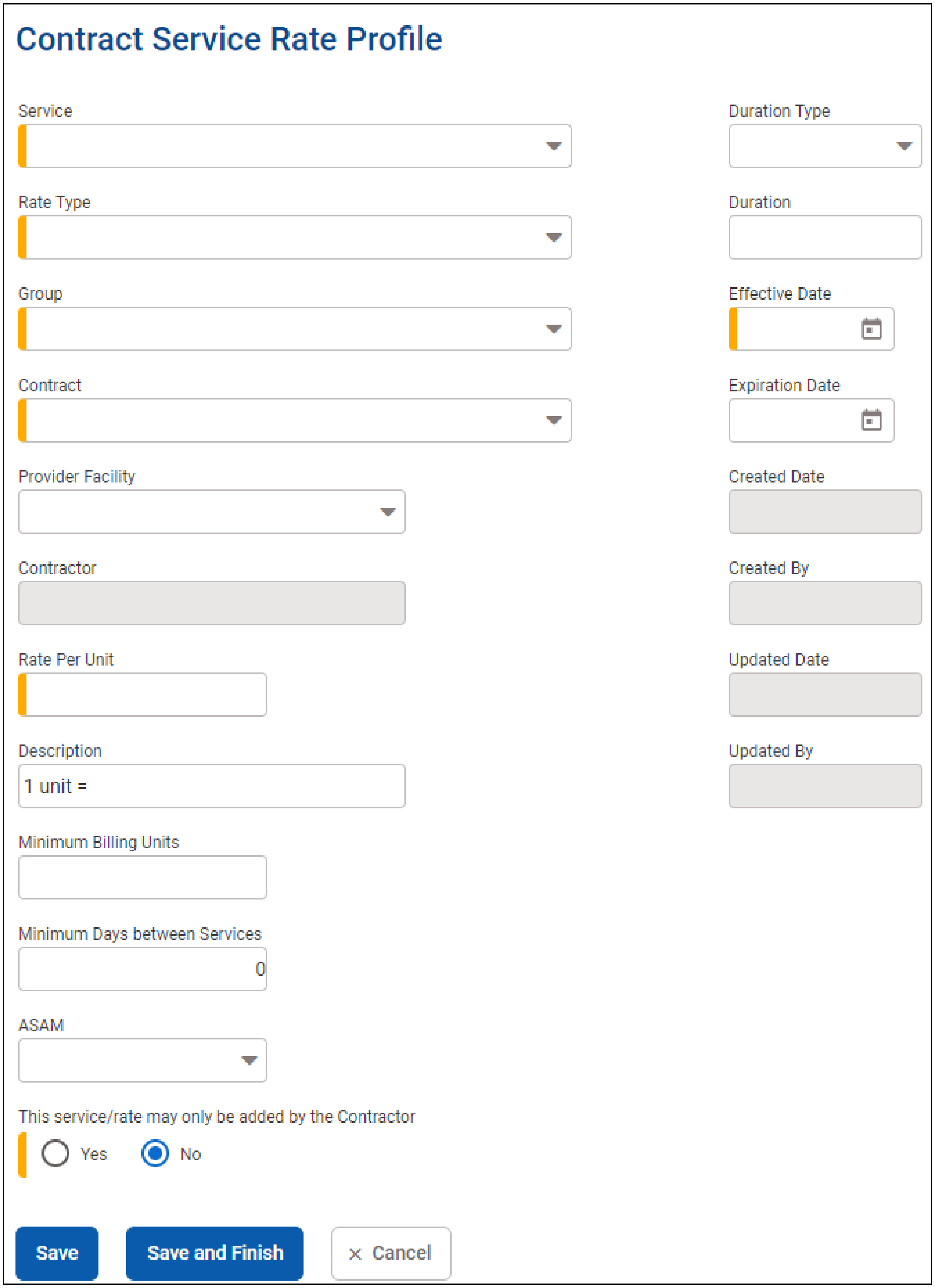



*Figure 111: Contract Service Rate Profile*

7. Click **Save and Finish**.

*Table 11: Contract Service Rate*

| Field | Description | Required |
|---|---|---|
| Service | This links the rate to a specific service. Available services are loaded on the backend. | Yes |
| Rate Type | Determines which contracts are affected.<br>• Standard applies the rate to all contracts.<br>• Contract applies the rate to a specific contract.<br>• Non-Contracted Service prevents a provider from billing for the set service. | Yes |
| Group | Associates the rate to the select group. | Yes |
| Contract | This option links the service rate to a specific contract. | No |
| Provider Facility | If a contract is selected, the rate can be further limited to a particular facility. | No |
| Contractor | | |
| Rate Per Unit | The dollar amount that will be paid per set unit. | Yes |
| Description | This field can be used to define the unit | No |
| Minimum Billing Units | Set if there is a minimum number of units that must be billed. | No |
| Minimum Days between Services | Set if there is a waiting period before a client can receive the service again. | No |
| ASAM | The level of care for the service rate can be set here if needed. | No |
| This service/rate may only be added by the Contractor | Yes or No. This should always be set to Yes. | Yes |
| Duration Type | The time unit for the entered duration. This field is used if the service is duration based. | No |
| Duration | A numeric value that corresponds with duration type to define the length of time for the service. | No |
| Effective Date | When the service rate becomes active and available for selection. | Yes |
| Expiration Date | Does the service rate expire after a specific date? If so, then set the date here. | No |

### 4.5.5. Fund Transfer

If funds ever need to be transferred from on contract to another, complete the following steps.

1. Navigate to the Contract List.
    a. Agency > Contract Management
2. Search for the contract that funds where funds will be removed.

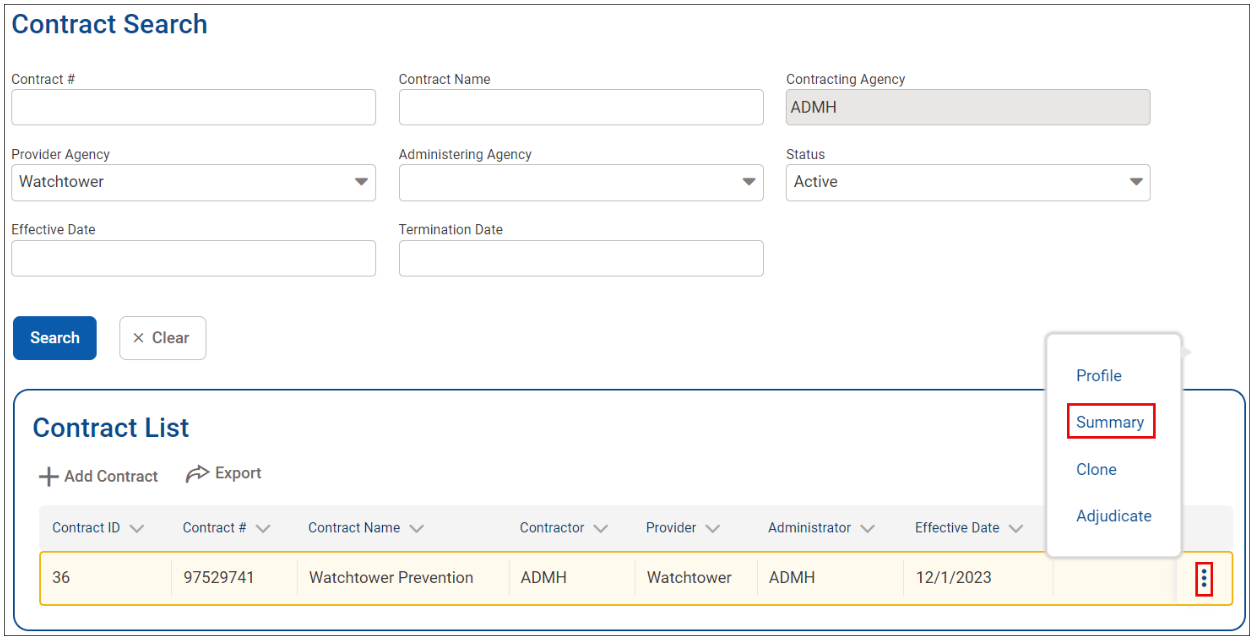



*Figure 112: Contract Summary*

3. To the right of the contract listing, click the **vertical ellipsis** and then click **Summary**.
4. The Financial Summary screen displays.

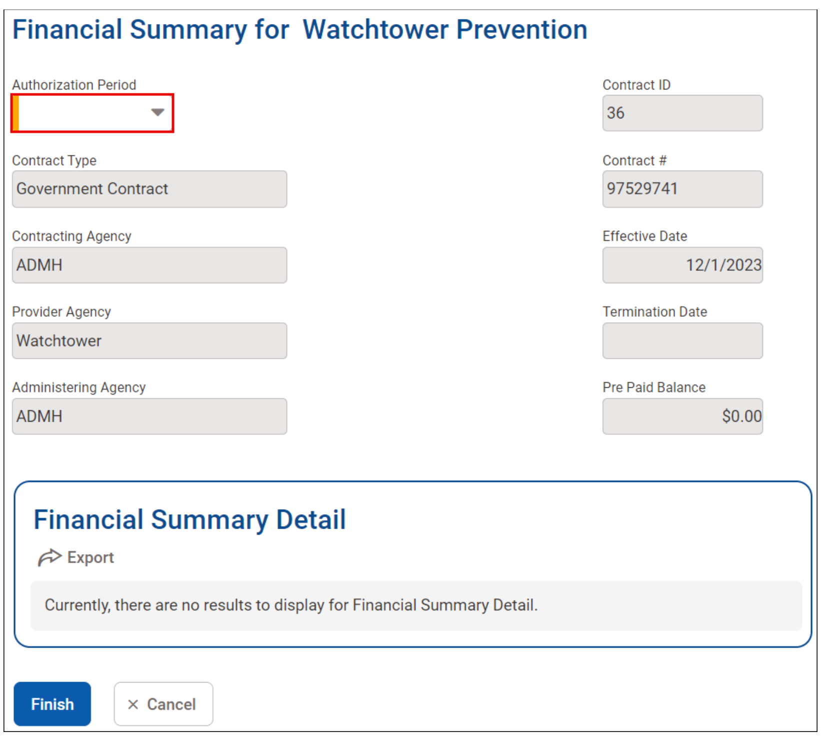



*Figure 113: Set Authorization Period*

5. Set the Authorization Period.
6. The Financial Summary Detail section will update and display summary data.

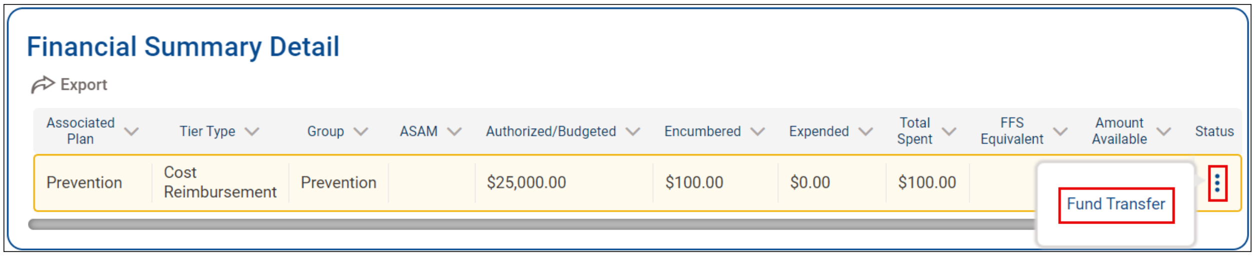



*Figure 114: Fund Transfer*

7. To the right of the associated plan, click the **vertical ellipsis** and then click **Fund Transfer**.
8. The Contract Funding Transfer List screen displays.

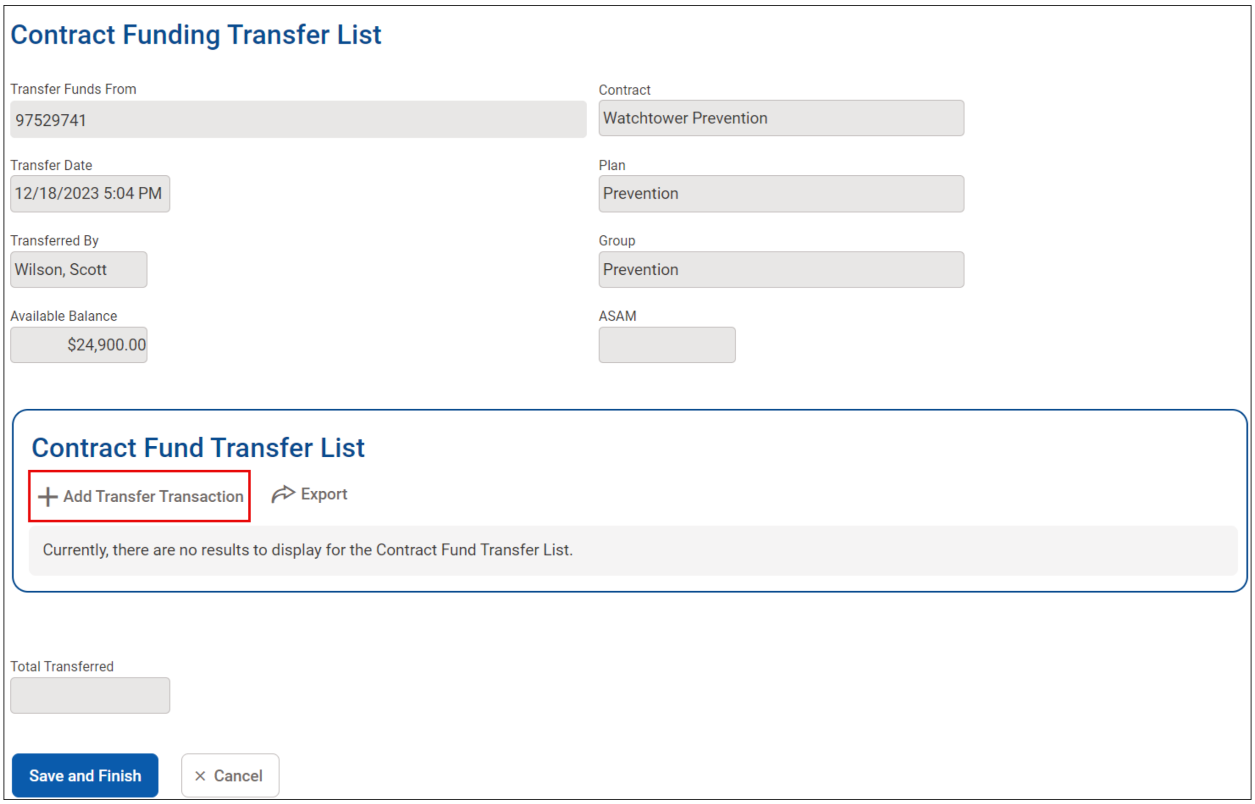



*Figure 115: Contract Funding Transfer*

9. Click **+Add Transfer Transaction**.
10. The Contract Funding Transfer Profile displays.
    a. The originating contract cannot be edited.
    b. Contract – Select the contract the funds are being transferred to.
    c. Plan-Group-ASAM – Select the plan-group the funds are being transferred to.
        i. Options will not display until a contract with associated plans-groups is selected.
    d. Transfer Amount – The amount of money being transferred.

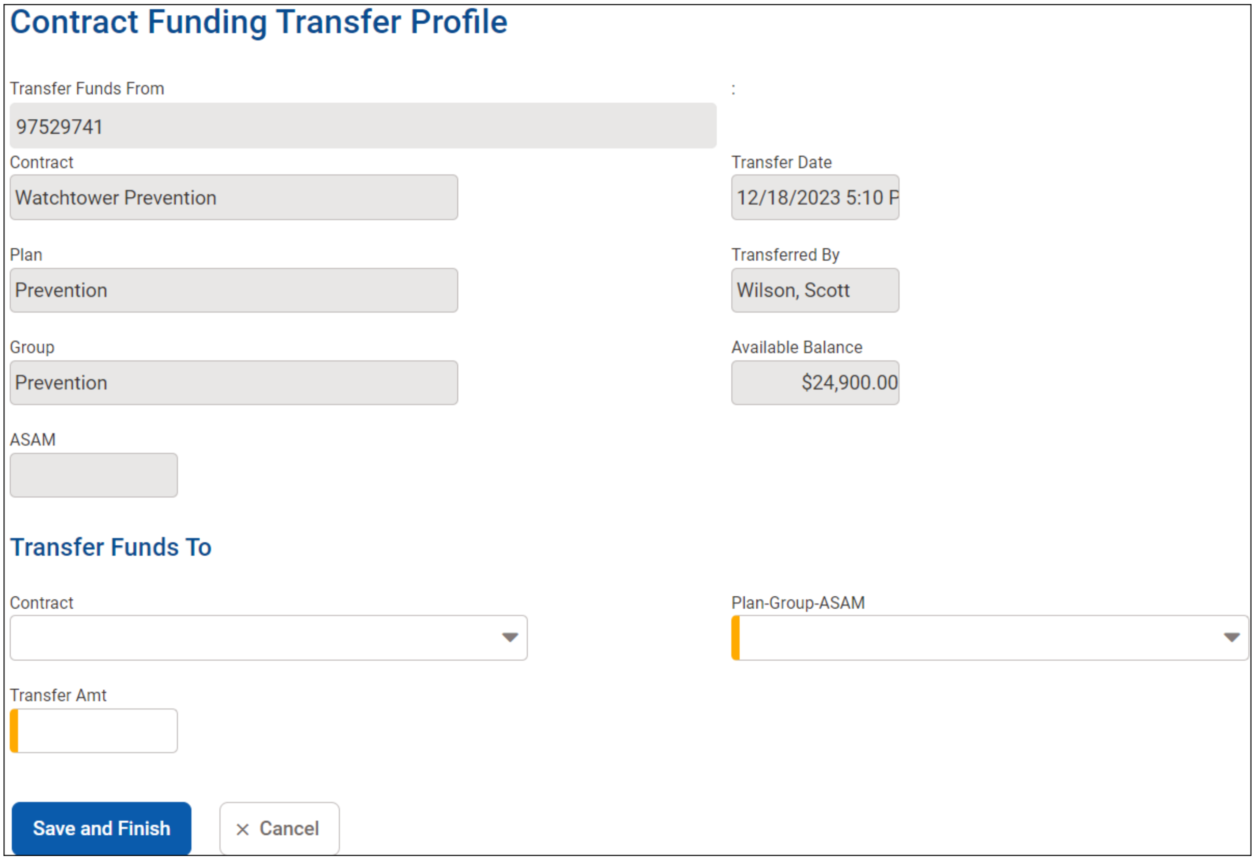



*Figure 116: Contract Funding Transfer Profile*

11. Click **Save and Finish**.

### 4.5.6. Fund Transfer History

This screen allows the administrator to view fund transfers that have taken place within a contract.

To view the contract fund transfer history:

1. From the left Navigation Menu, click **Agency**.

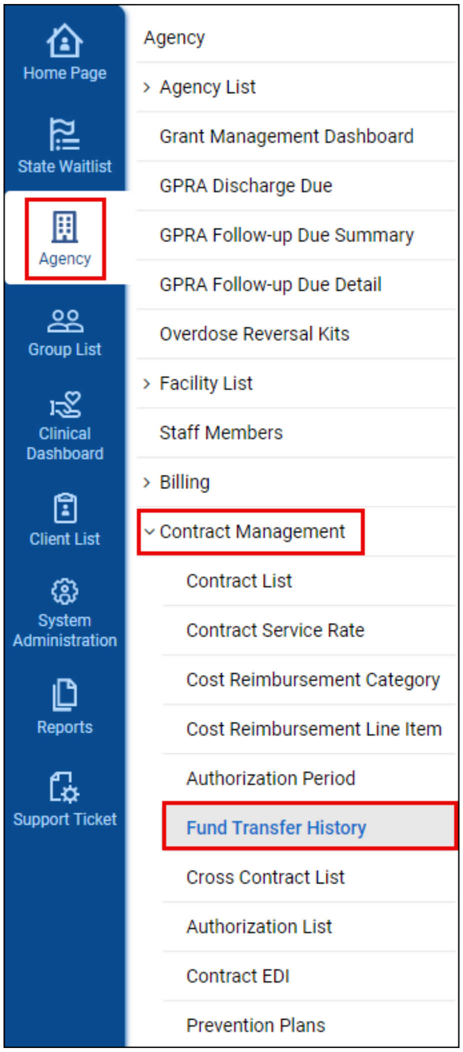
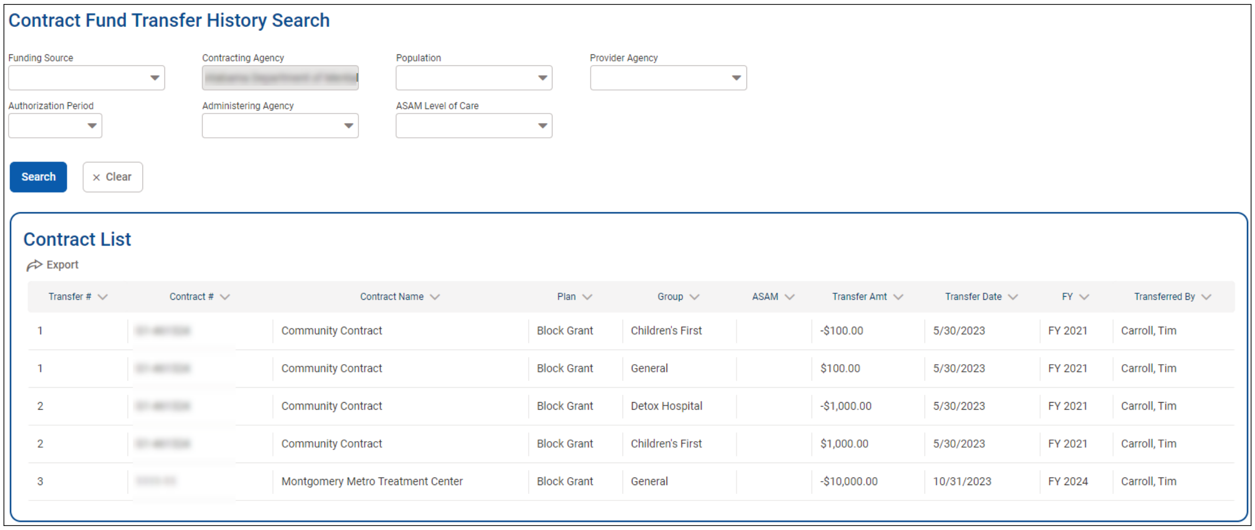



*Figure 117: Fund Transfer History*

2. In the sub-menu, click **Contract Management** and then click **Fund Transfer History**.
3. The Contract Fund Transfer History Search screen will display.
    a. Search can be used to filter data in the Contract List.



**Contract Fund Transfer History Search**

Funding Source | Contracting Agency: [illegible] | Population | Provider Agency

Authorization Period | Administering Agency | ASAM Level of Care

Search | × Clear

**Contract List**

Export

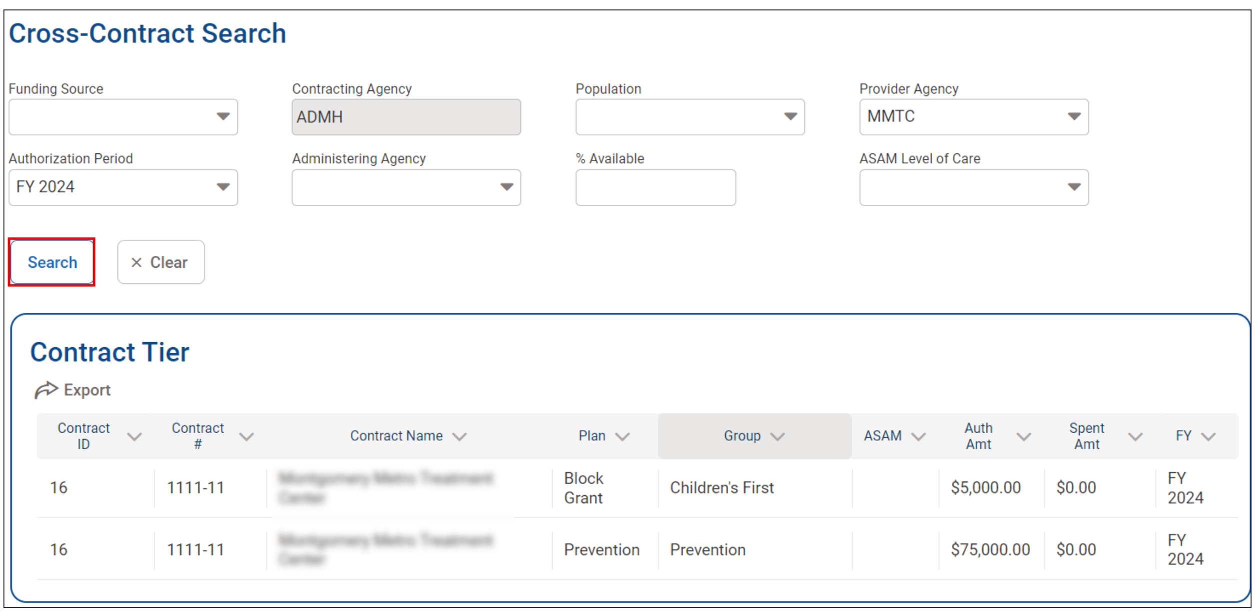
| Transfer # | Contract # | Contract Name | Plan | Group | ASAM | Transfer Amt | Transfer Date | FY | Transferred By |
|---|---|---|---|---|---|---|---|---|---|
| 1 | [illegible] | Community Contract | Block Grant | Children's First | | -$100.00 | 5/30/2023 | FY 2021 | Carroll, Tim |
| 1 | [illegible] | Community Contract | Block Grant | General | | $100.00 | 5/30/2023 | FY 2021 | Carroll, Tim |
| 2 | [illegible] | Community Contract | Block Grant | Detox Hospital | | -$1,000.00 | 5/30/2023 | FY 2021 | Carroll, Tim |
| 2 | [illegible] | Community Contract | Block Grant | Children's First | | $1,000.00 | 5/30/2023 | FY 2021 | Carroll, Tim |
| 3 | [illegible] | Montgomery Metro Treatment Center | Block Grant | General | | -$10,000.00 | 10/31/2023 | FY 2024 | Carroll, Tim |

*Figure 118: Contract Funds Transfer History Search*

### 4.5.7. Cross Contract List

This function allows the state to view all tiers on all contracts to be informed on how funds are being allocated and spent.

1. From the left Navigation Menu, click **Agency**.
2. In the sub-menu, click **Contract Management**.
3. Under Contract Management menu items, click **Cross-Contract List**.
4. The Cross-Contract Search screen appears.



**Cross-Contract Search**

Funding Source | Contracting Agency: ADMH | Population | Provider Agency: MMTC

Authorization Period: FY 2024 | Administering Agency | % Available | ASAM Level of Care

Search | × Clear

**Contract Tier**

Export

| Contract ID | Contract # | Contract Name | Plan | Group | ASAM | Auth Amt | Spent Amt | FY |
|---|---|---|---|---|---|---|---|---|
| 16 | 1111-11 | [illegible] | Block Grant | Children's First | | $5,000.00 | $0.00 | FY 2024 |
| 16 | 1111-11 | [illegible] | Prevention | Prevention | | $75,000.00 | $0.00 | FY 2024 |

*Figure 119: Cross Contract Search*

5. Enter desired criteria and click **Search**.

## 4.6. Alerts Configuration

Alerts can be created and configured to trigger for a specific agency or agency type based on determined conditions and alert type.

**NOTE:** Alerts display on the user's Home Page under the Alerts section.

**NOTE:** Confirm the agency is active prior to creating alerts.

To setup alerts:

1. From the left navigation menu, click **Agency**.
2. In the submenu list, click **Alerts Configuration**.

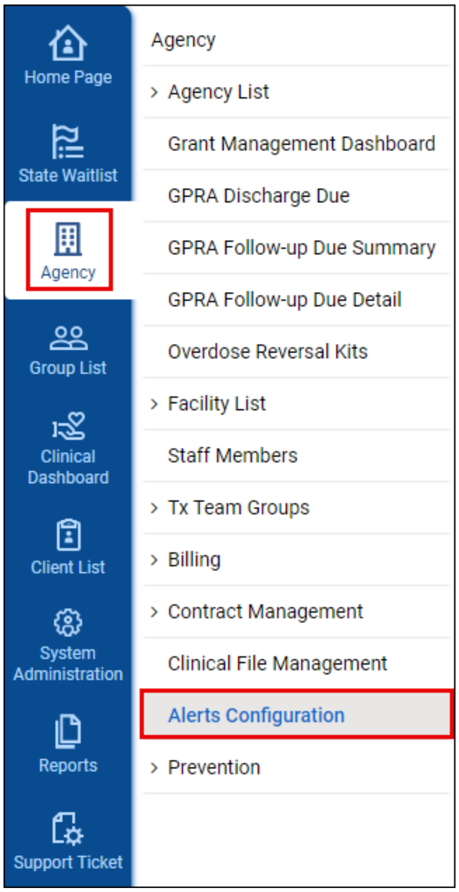



*Figure 120: Accessing Alerts Configuration*

3. The Alert Configuration Search screen will display.
    a. Existing alerts are listed in the List section.
    b. Search can be performed to narrow the results.

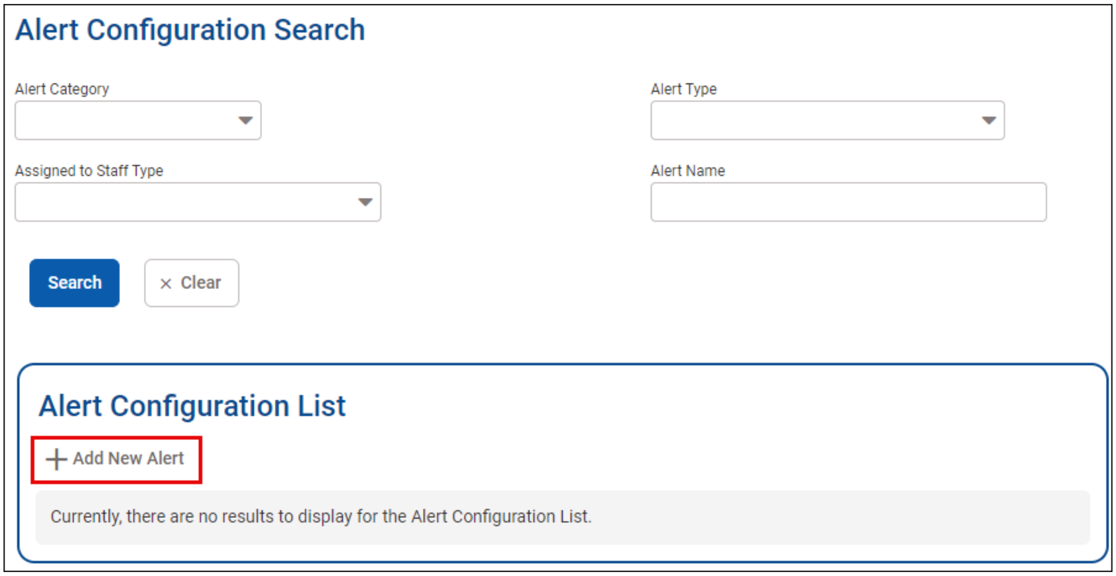



*Figure 121: Alert Configuration Screen*

4. Click **+Add New Alert**.
5. The Agency Alert Configuration Profile screen will display.
6. Complete all required and relevant fields.

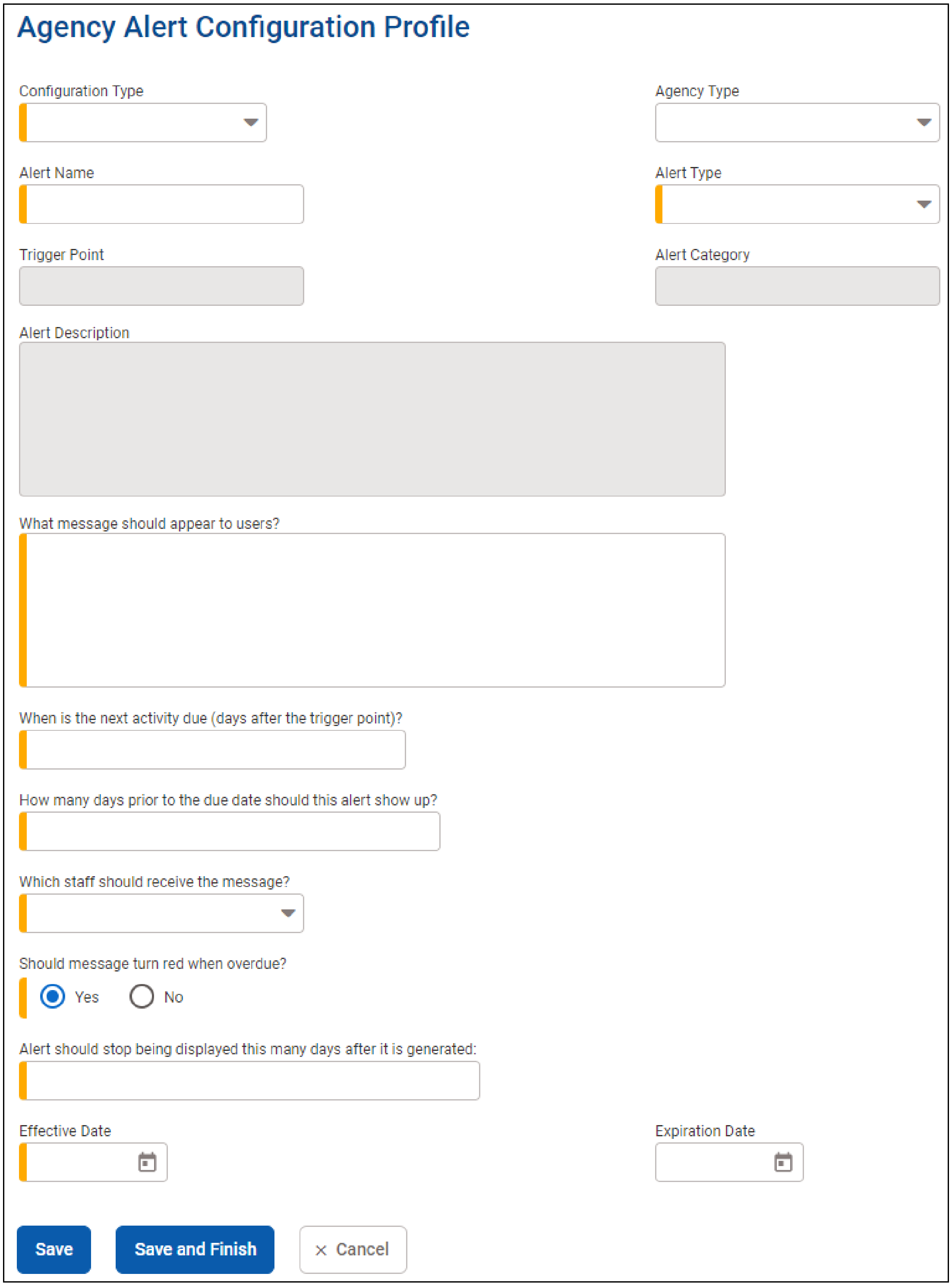



*Figure 122: Agency Alert Configuration Profile*

7. Click **Save and Finish**.

*Table 12: Agency Alert Configuration*

| Field | Description |
|---|---|
| Configuration Type | This will either be set to agency or agency type. |
| Agency Type | • This field is read-only if Agency was selected under Configuration Type.<br>• This field is required if Agency Type is selected under Configuration Type.<br>• Select the type of agency (prevention or substance use) this alert is designed for. |
| Alert Name | This is the alert name that displays on the search screen. |
| Alert Type | This is the alert event type that determines when the alert is triggered. |
| Trigger Point | This is a read-only field that auto populates when the alert is triggered based on the set Alert Type. |
| Alert Category | This is a read-only field that is auto populated based on the Alert Type selected. This field will either be agency or client. |
| Alert Description | This a read-only field that is auto populated based on the Alert Type selected. It provides a description for the alert. |
| What message should appear to users? | This is the message users will see when the alert is triggered. |
| When is the next activity due (days after the trigger point)? | The days remaining until the next activity against the alert type is due. |
| How many days prior to the due date should this alert show up? | This is the alert trigger threshold in days. For example, if set to 45, then 45 days before the next activity against the alert type is due, this alert will trigger displaying on the user's screen. |
| Which staff should receive this message? | Designate the staff member type that should see the alert when triggered. |
| Should message turn red when overdue? | If set to Yes, then the alert will display in red in the Alerts section of the Home Page if the alert is not resolved by the next activity due date. |
| Which facilities follow this rule? | This field only displays if Configuration Type is set to Agency. The user will select which facilities under the agency can receive this alert. |
| Alert should stop being displayed this many days after it is generated: | The alert will drop off the user's Home Page after the set number of days. |
| Effective Date | This is when the alert can begin to start triggering. |
| Expirations Date | The alert is no longer active and will not trigger after the set date. |

# 5. PROVIDER ADMINISTRATION

The following information provides instruction to the provider administrator for the management of their agency.

## 5.1. Agency Management

While the provider administrator is not responsible for creating their agency in WITS, they may need to edit the profile for updates or complete information not entered by the state administrator.

### 5.1.1. Agency Profile

To modify the provider's agency profile, complete the following steps.

1. From the left Navigation Menu, click **Agency**.

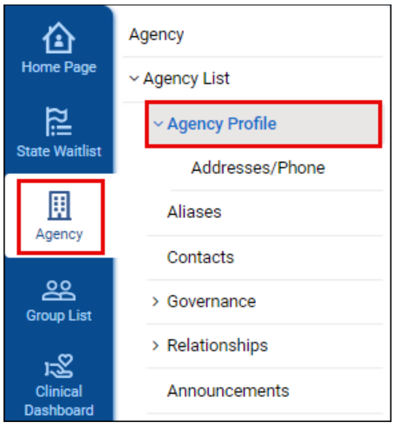



*Figure 123: Agency Profile Navigation*

2. In the sub-menu, click **Agency Profile**.
3. The Agency Profile screen displays.
    a. At a minimum, the required fields will already be completed.
4. Complete the optional fields as needed.
5. Click **Save and Finish**.

### 5.1.2. Addresses/Phone

Addresses and phone numbers are added/updated in a subsection of the agency profile. Furthermore, a user must be within an agency's address to add or update a phone number.

Follow the steps below to add or update addresses or phone numbers.

1. From the left Navigation Menu, click **Agency**.
2. In the sub-menu, click **Agency Profile** and then click **Addresses/Phone**.

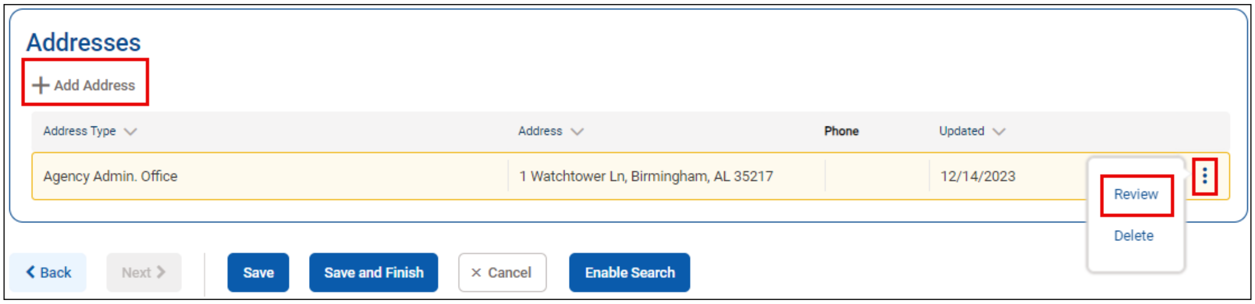



*Figure 124: Add/Update Address*

3. To update an existing address, click on the **vertical ellipsis** to the right of the address and then click **Review**.
4. Otherwise, click **+Add Address**.
5. At a minimum, complete the required fields.
    a. Always complete as much information as possible if known.

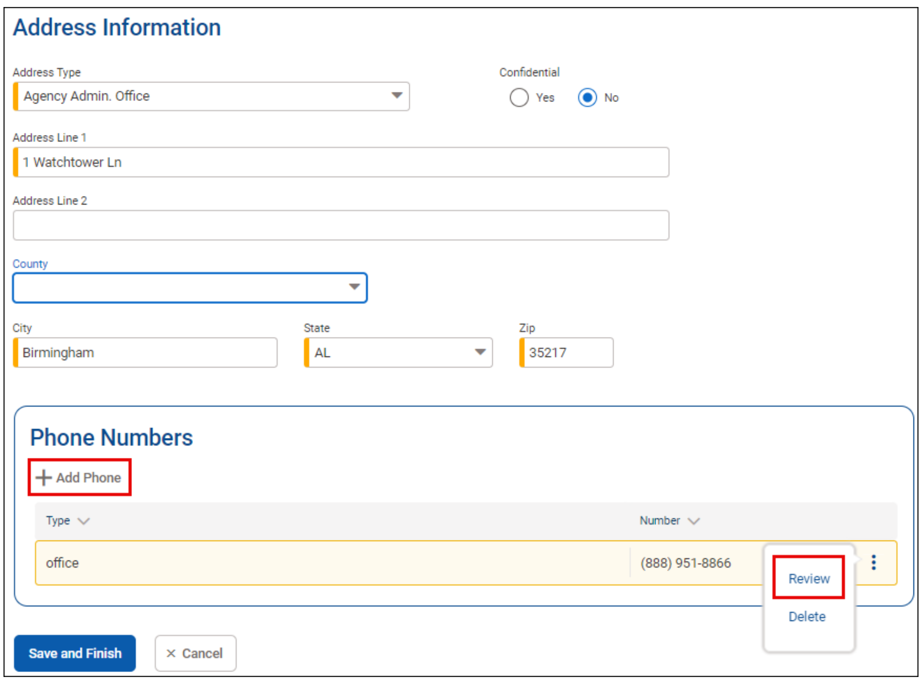



*Figure 125: Adding Address Information*

6. To update an existing phone number, click on the **vertical ellipsis** to the right of the number and then click **Review**.
7. To add a phone number, click **+Add Phone**.
8. Answer fields as required or applicable.

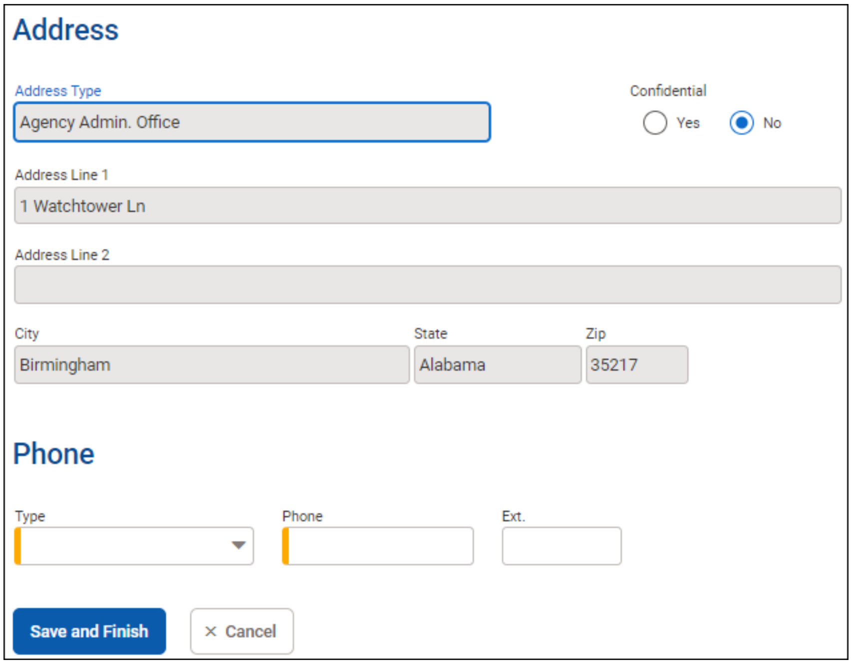



*Figure 126: Adding Phone Number*

9. Click **Save and Finish** to save phone information and then again to save address information.

### 5.1.3. Aliases

If the provider agency has changed names, the previous names will be listed here.

### 5.1.4. Contacts

See section Agency – Contacts for adding contacts to an agency record.

### 5.1.5. Governance

If the agency has a governance structure in place, it can be recorded here.

NOTE: The agency in question will need to be active.

1. From the **Agency** submenu, click **Governance**.

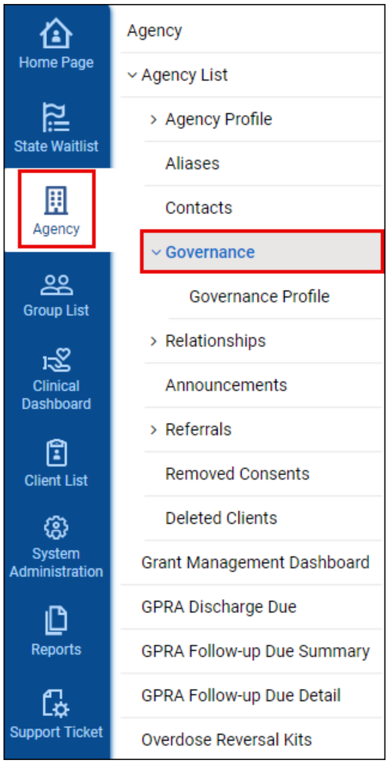



*Figure 127: Accessing Governance*

2. The Governance List screen will display.
    a. Existing records will be listed here.

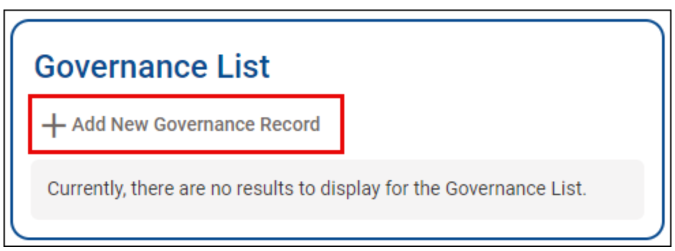



*Figure 128: Add Governance Record*

3. Click **+Add New Governance Record**.
4. The Governance Profile screen will display.
5. Complete all required and relevant fields.

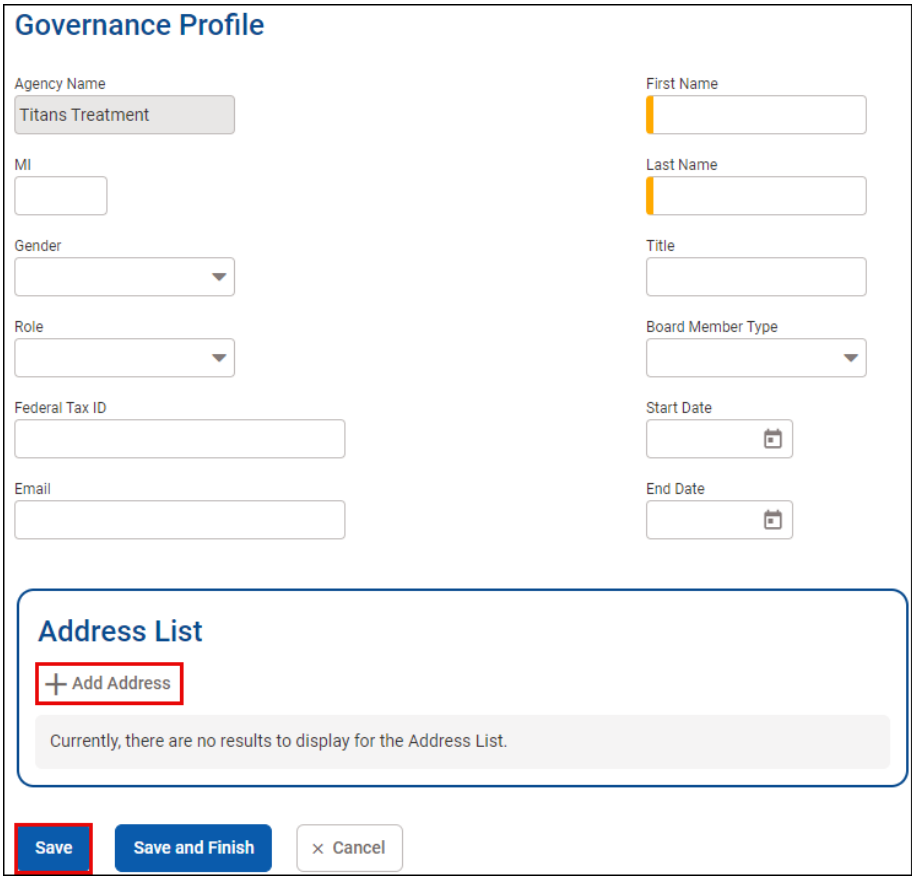



*Figure 129: Governance Profile*

6. Click **Save**.
7. Click **+Add Address**.
8. Complete all required and relevant fields.

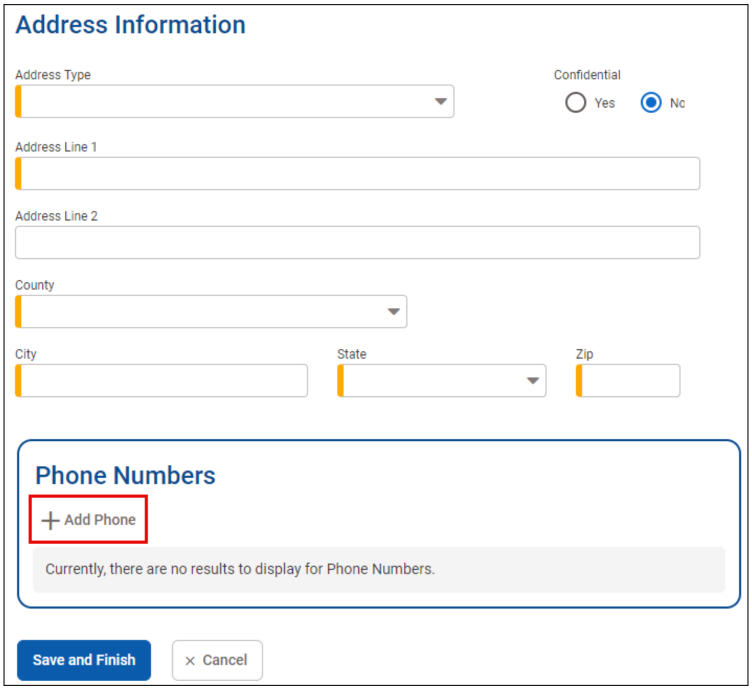



*Figure 130: Governance - Add Address*

9. Click **+Add Phone**.
10. Complete all required and relevant fields.

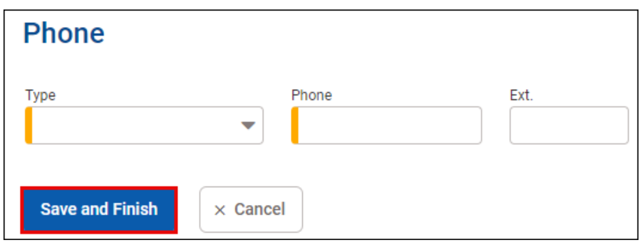



*Figure 131: Governance Add Phone*

11. Click **Save and Finish**.

### 5.1.6. Relationships

Clicking on the Relationships submenu accesses the Relationship screen which will appear blank. Click **Collaborative** or **Disclosure** to proceed.

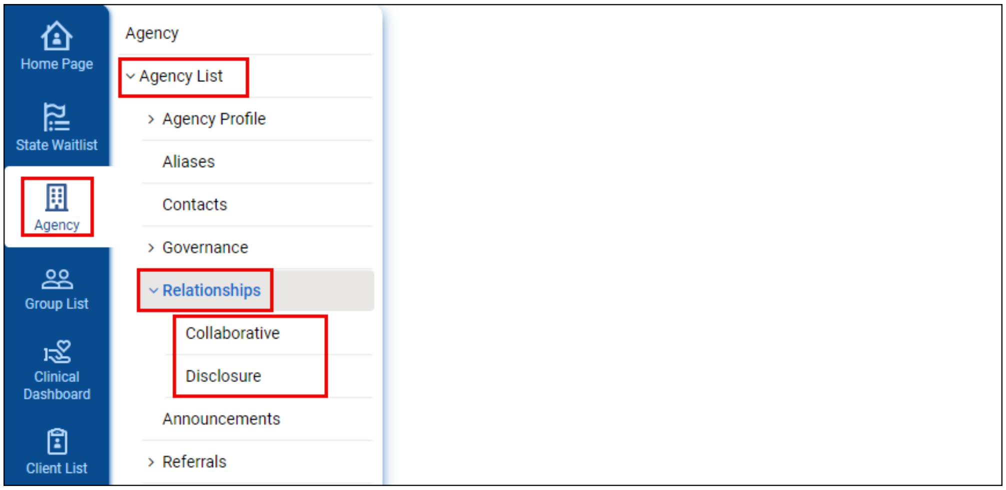



*Figure 132: Accessing Relationships*

### 5.1.6.1. Collaborative

If an agency is a child/parent of another agency, that collaboration will display on this screen.

**NOTE:** ADMH does not currently use parent agencies.

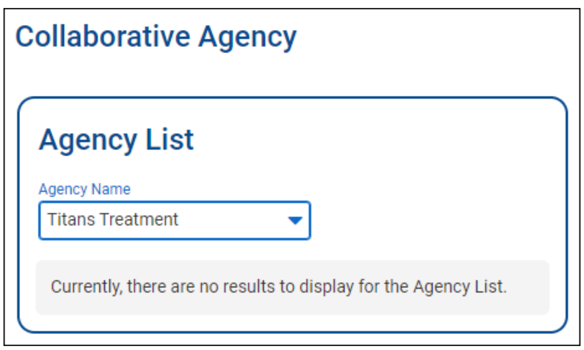



*Figure 133: Collaborative Agency List*

### 5.1.6.2. Disclosure

The disclosure allows an agency to create a template used when client consents are generated. A general disclosure can be created for use with all providers, or a disclosure can be created for each provider the agency collaborates with.

1. From the **Agency** submenu, click **Relationships** and then click **Disclosure**.

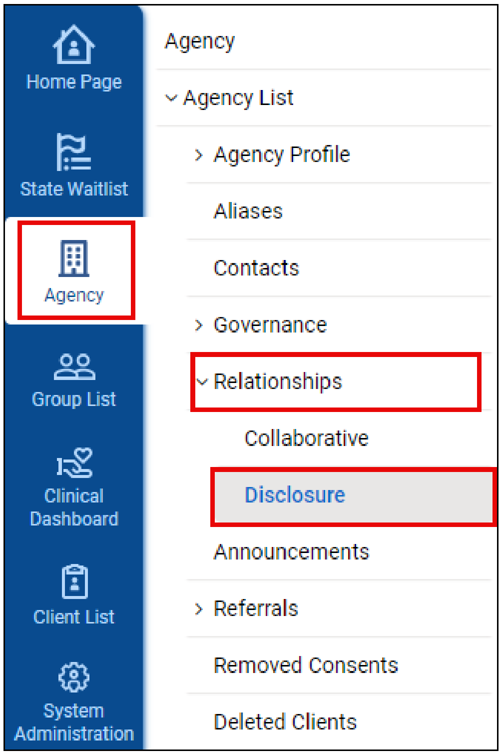



*Figure 134: Accessing Disclosure*

2. The Agency Disclosure Domain List screen will display.
    a. Existing disclosures will be listed here.

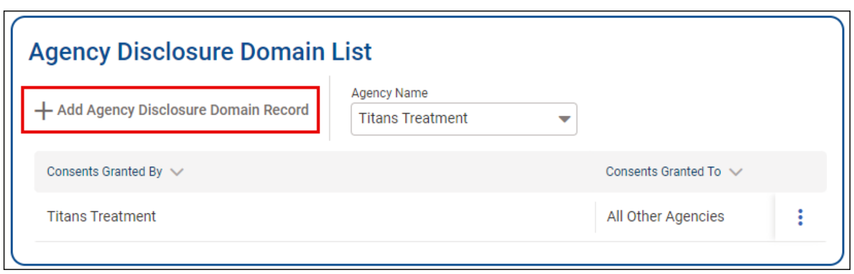
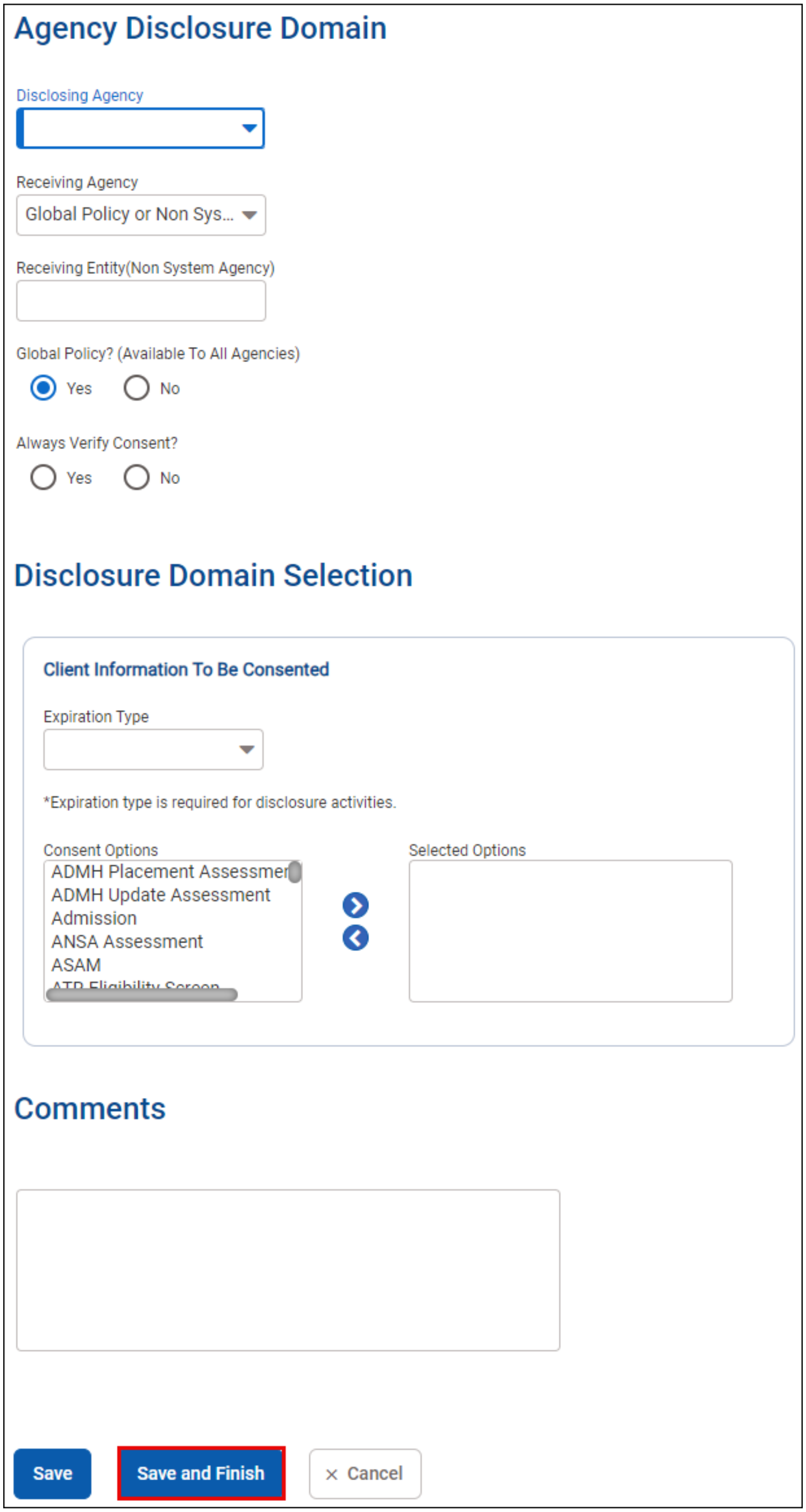



*Figure 135: Agency Disclosure Domain List*

3. Click **+Add Agency Disclosure Domain Record**.
4. The Agency Disclosure Domain screen will display.
5. Complete all required and relevant fields.
    a. Consent Options allows the agency to set what client information is shared with other providers.
    b. Expiration Type allows the agency to set when information is no longer available to another provider.



## Agency Disclosure Domain

Disclosing Agency

Receiving Agency

Global Policy or Non Sys...

Receiving Entity(Non System Agency)

Global Policy? (Available To All Agencies)

Yes No

Always Verify Consent?

Yes No

## Disclosure Domain Selection

Client Information To Be Consented

Expiration Type

*Expiration type is required for disclosure activities.

Consent Options

ADMH Placement Assessmen

ADMH Update Assessment

Admission

ANSA Assessment

ASAM

Selected Options

## Comments

Save | Save and Finish | × Cancel

*Figure 136: Agency Disclosure Domain*

6. Click **Save and Finish**.

## 5.1.7. Referrals

There are two screens in this section that an agency can use to manage their referred clients.

### 5.1.7.1. Referrals In

This screen will list all clients that have been referred to the agency.

1. From the **Agency** submenu, click **Referrals** and then click **Referrals In**.

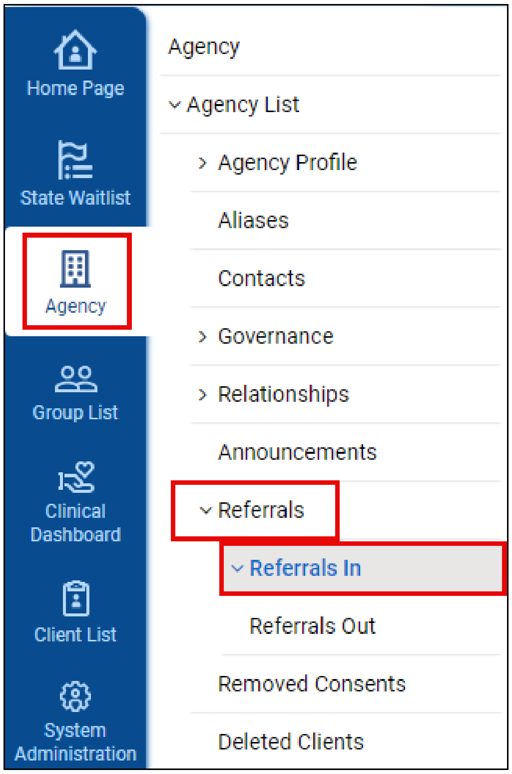



*Figure 137: Accessing Referral In*

2. The Referrals In Search screen will display.
3. Input search criteria and then click **Search** to list results in the Referrals for <Agency Name> section.
    a. Clicking Search without any criteria will display all referrals into the agency.

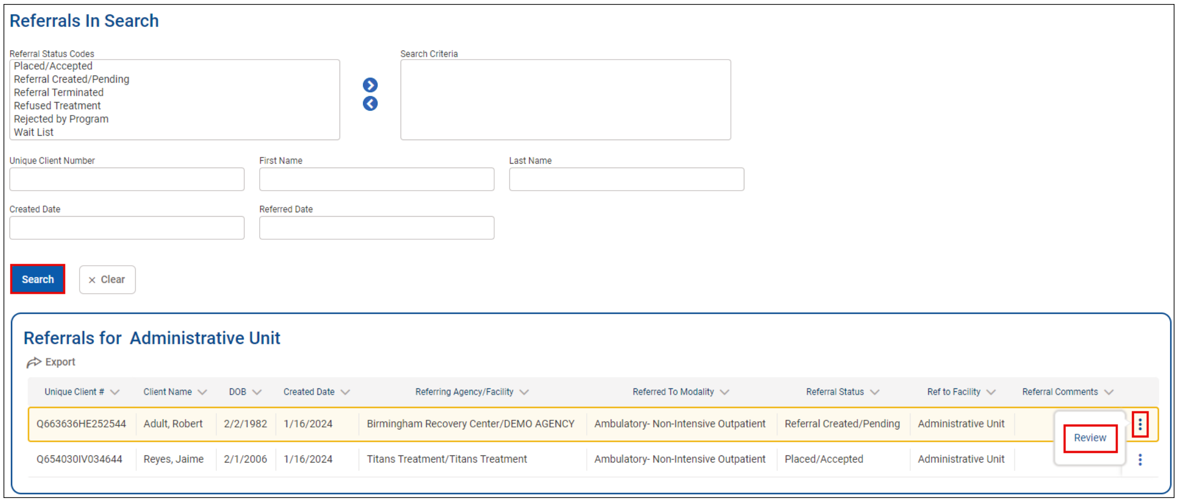



*Figure 138: Referrals In Search*

4. To the right of the referral, click the **vertical ellipsis** and then click **Review**.
5. The Referral screen will display.
6. Here the user can record an appointment date and the client’s attendance.
7. The user can also change the referral status.
    a. To accept a client, choose **Placed/Accepted** in the Referral Status dropdown.

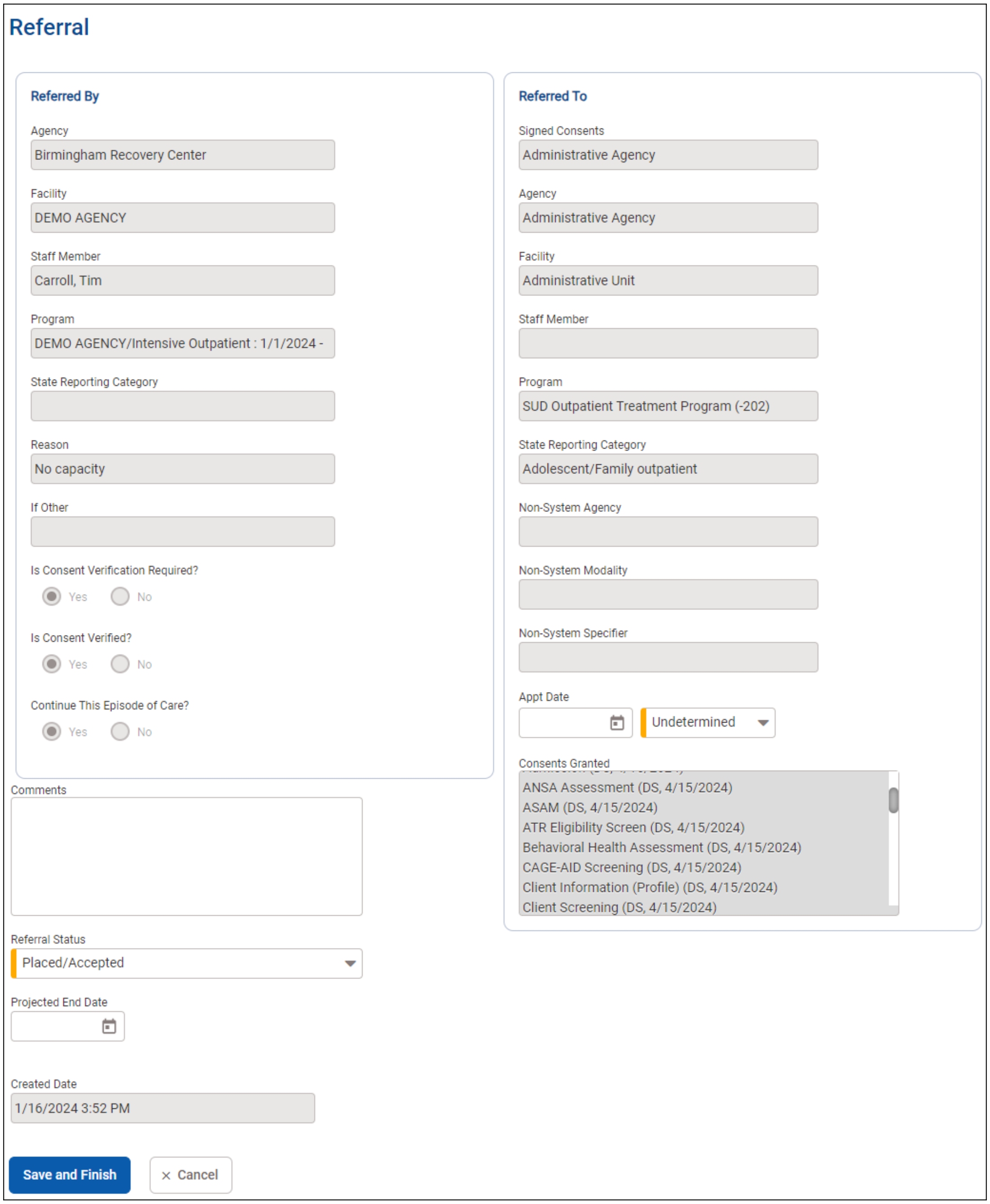



*Figure 139: Client Referral Screen*

8. Click **Save and Finish**.

### 5.1.7.2. Referrals Out

Referrals out displays clients that the agency has referred to other providers for service.

1. From the **Agency** submenu, click **Referrals** and then click **Referrals Out**.

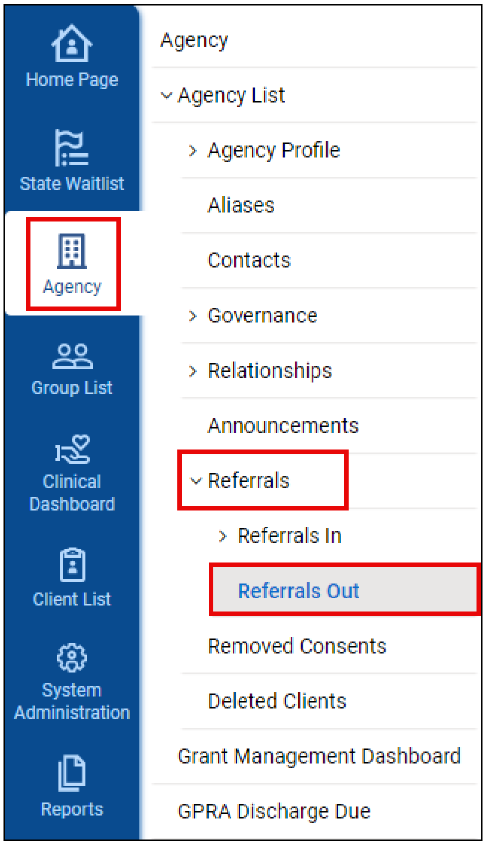



*Figure 140: Accessing Referrals Out*

2. The Referrals Out Search screen will display.
3. Set search criteria and then click **Search** to list results in the Referrals for <Agency Name> section.
    a. Not setting any search fields and clicking Search will display all referrals into the agency.

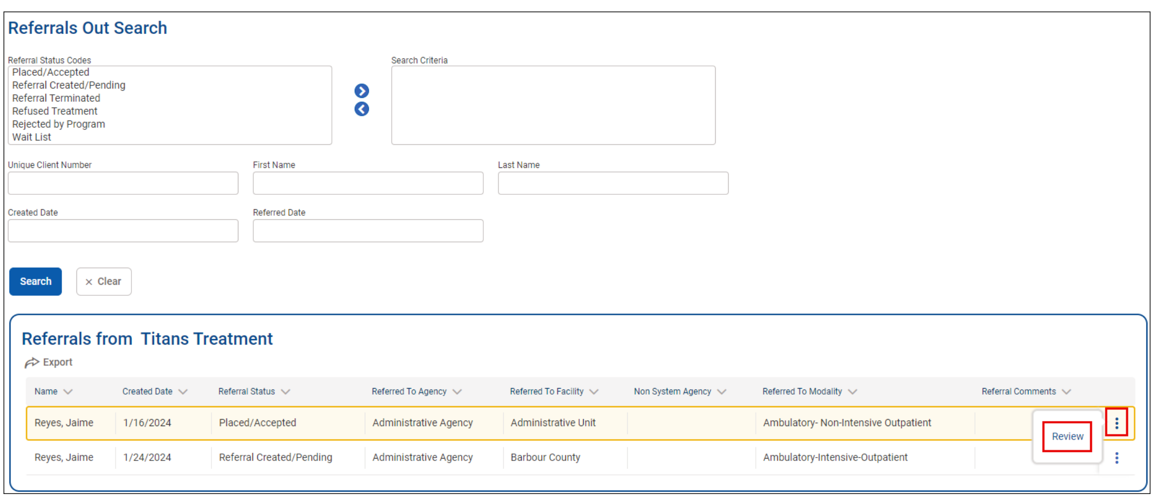
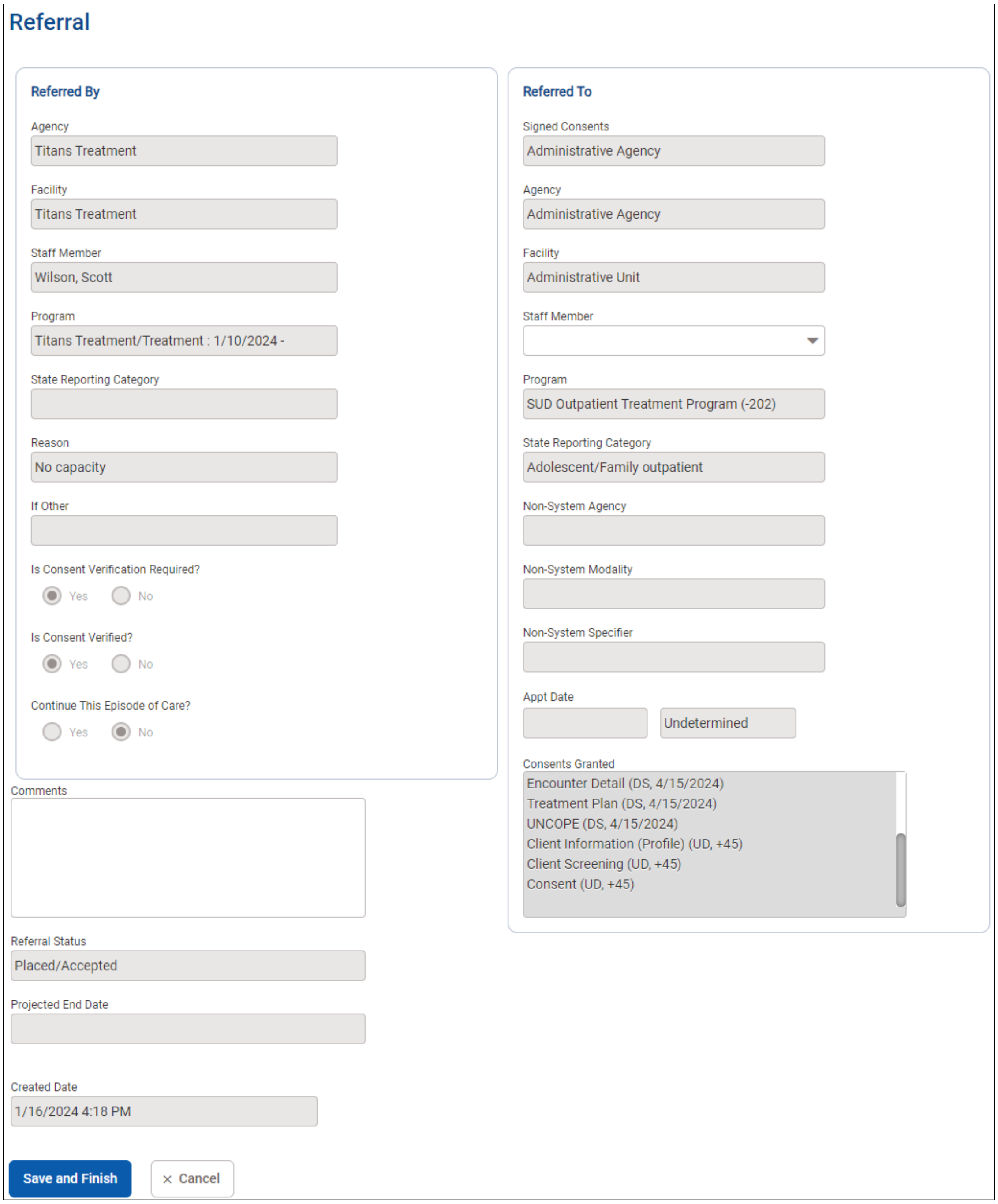



*Figure 141: Referrals Out Search Screen*

4. To the right of the referral, click the **vertical ellipsis** and then click **Review**.
5. The Referral screen will display.

6. Here the user can review the referral but make no changes.



## Referral

**Referred By**

Agency: Titans Treatment

Facility: Titans Treatment

Staff Member: Wilson, Scott

Program: Titans Treatment/Treatment : 1/10/2024 -

State Reporting Category:

Reason: No capacity

If Other:

Is Consent Verification Required? (•) Yes ( ) No

Is Consent Verified? (•) Yes ( ) No

Continue This Episode of Care? ( ) Yes (•) No

**Referred To**

Signed Consents: Administrative Agency

Agency: Administrative Agency

Facility: Administrative Unit

Staff Member:

Program: SUD Outpatient Treatment Program (-202)

State Reporting Category: Adolescent/Family outpatient

Non-System Agency:

Non-System Modality:

Non-System Specifier:

Appt Date: Undetermined

Consents Granted:
Encounter Detail (DS, 4/15/2024)
Treatment Plan (DS, 4/15/2024)
UNCOPE (DS, 4/15/2024)
Client Information (Profile) (UD, +45)
Client Screening (UD, +45)
Consent (UD, +45)

Comments:

Referral Status: Placed/Accepted

Projected End Date:

Created Date: 1/16/2024 4:18 PM

Save and Finish | × Cancel

*Figure 142: Referral*

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

### 5.1.8. Removed Consents

If consent for a client is removed, the client will display on this screen. Click **Removed Consent** under the **Agency List** submenu.

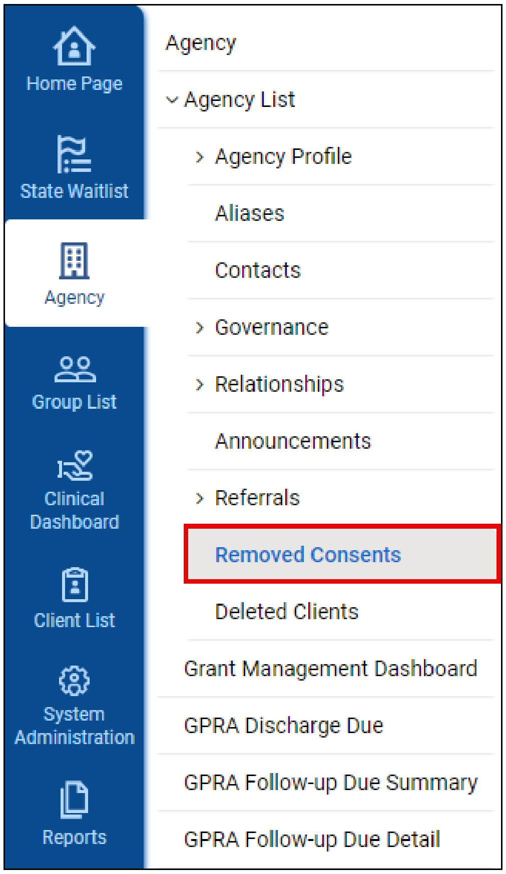



*Figure 143: Accessing Removed Consents*

The Removed Consented Client Search screen will display.

- Search can be used to filter results.
- Search results display in the Removed Consented Client List section.

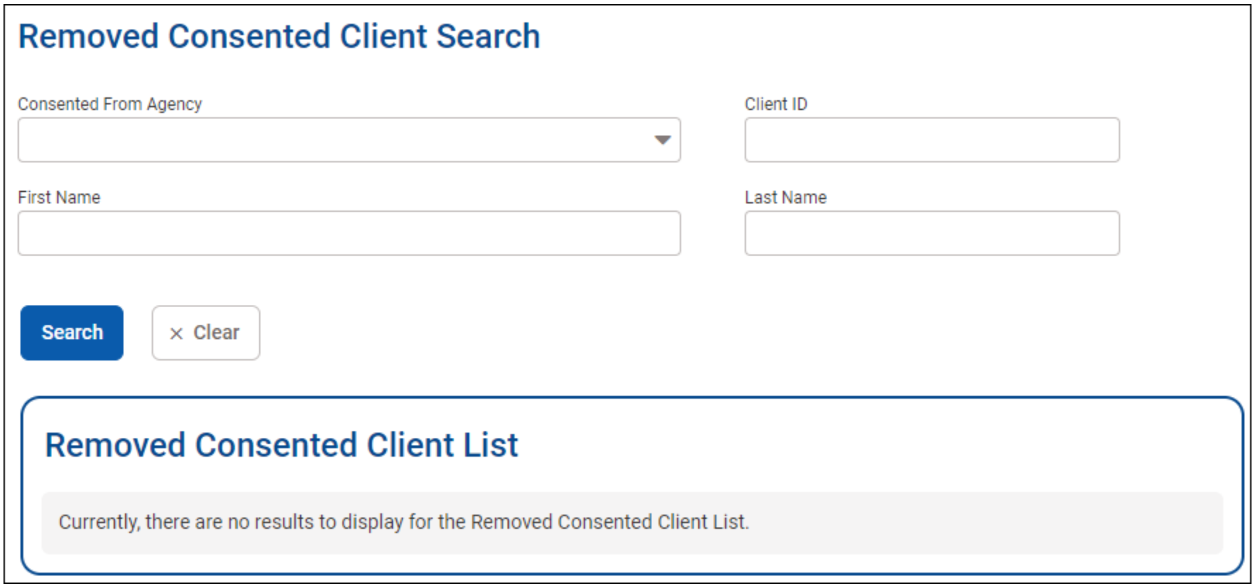



*Figure 144: Removed Consent Screen*

### 5.1.9. Deleted Clients

Any deleted client records will display here.

1. From the **Agency** submenu, click **Deleted Clients**.

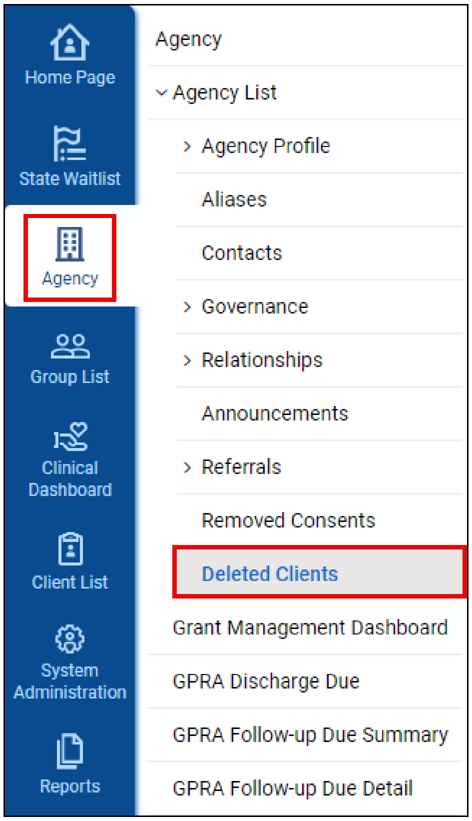



*Figure 145: Accessing Deleted Clients*

2. The Deleted Client screen will display.
    a. The Cleanup History Detail List will show all data.
    b. Results can be filtered using Search.
3. This is just a view only list. Data cannot be manipulated.

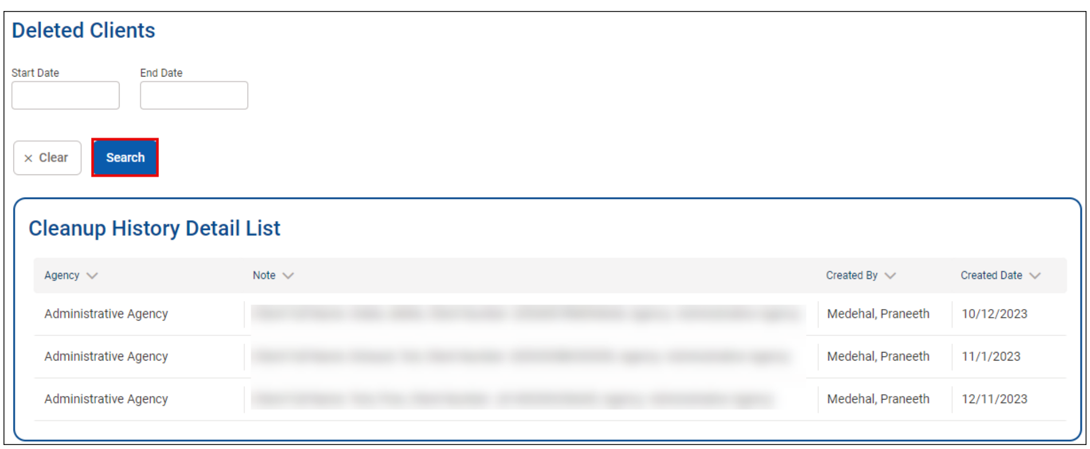



*Figure 146: Deleted Clients*

## 5.2. Facility Management

The following applies to facilities and their management:

- The agency must be created before any facility management can be performed.
- Facilities are the physical location for the agency.
- There may be more than one facility assigned to an agency.

### 5.2.1. Facility Creation

See section State – Facility Creation for information on how to manage a facility record.

### 5.2.2. Facility Navigation

See section State – Facility Navigation for information on navigating to a facility record.

### 5.2.3. Contacts

This process assumes the user has navigated to a facility record. Follow the steps below to add a contact to a facility record.

**NOTE:** Only existing staff members in WITS can be set as a contact. Their staff member account must be created first.

1. Under Agency > Facility List, click **Contacts**.


*Figure 147: Facility Contact*

2. The screen Contacts for <Facility Name> will display.

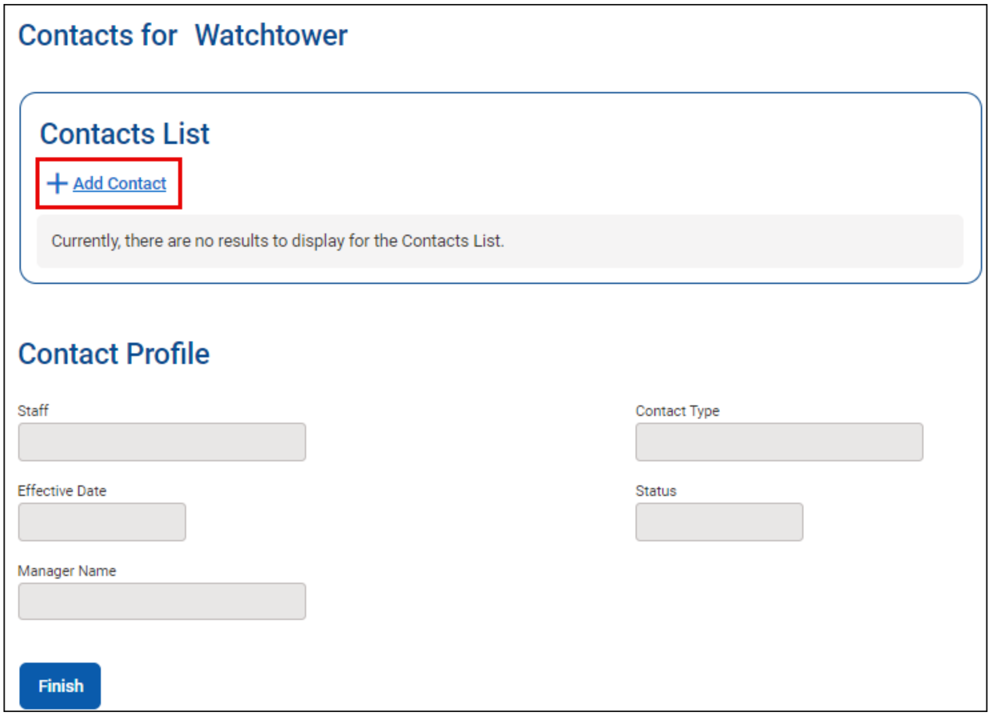



*Figure 148: Add Facility Contact*

3. Click **+Add Contact**.
4. Complete all required fields in the Facility Contact Profile.

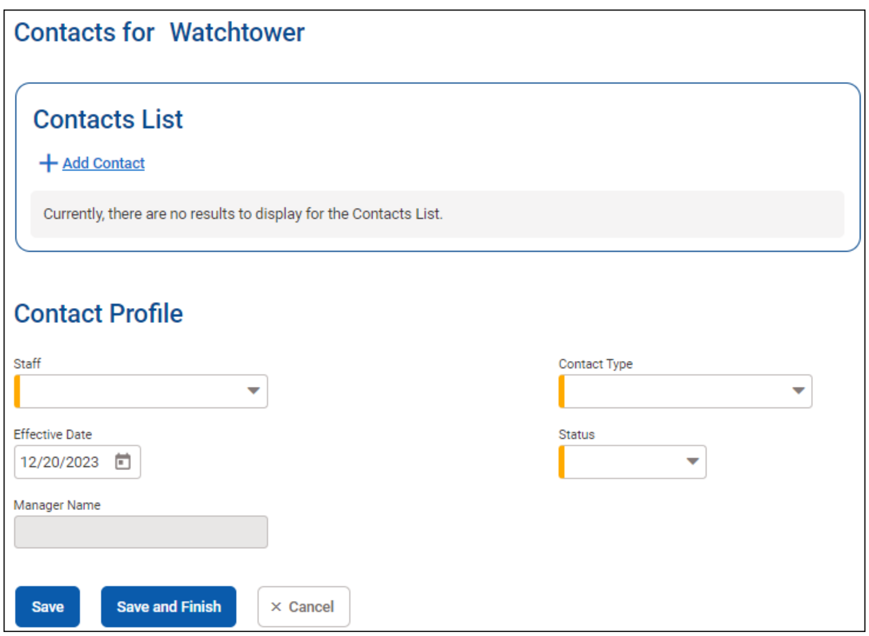



*Figure 149: Facility Contact Profile*

5. Click **Save and Finish**.

### 5.2.4. Special Services

This screen allows an agency to identify special services offered by the facility.

This process assumes the user has navigated to a facility record. Follow the steps below to add a contact to a facility record.

1. Under Agency > Facility List, click **Special Services**.


*Figure 150: Special Services*

2. The Special Services screen displays.
    a. Special Populations Services can be identified here by moving the service to Special Populations Served.
    b. Click **Save**.

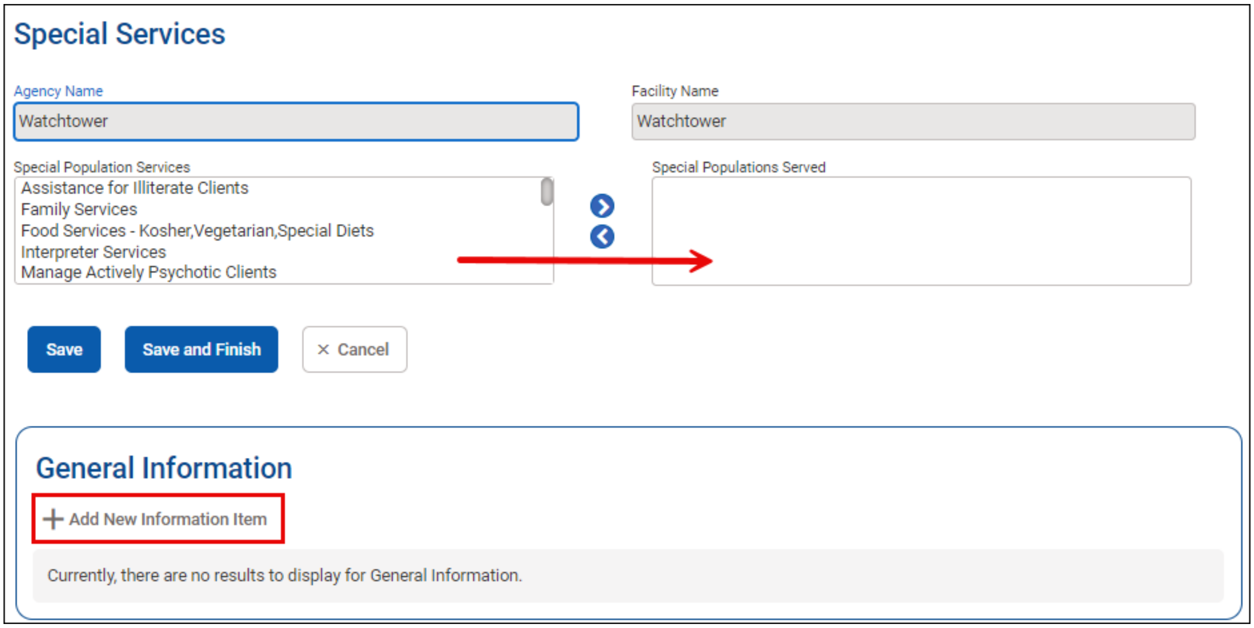



*Figure 151: Special Populations*

3. To create a General Information item, click **+Add New Information Item**.
4. Complete all required and relevant fields.

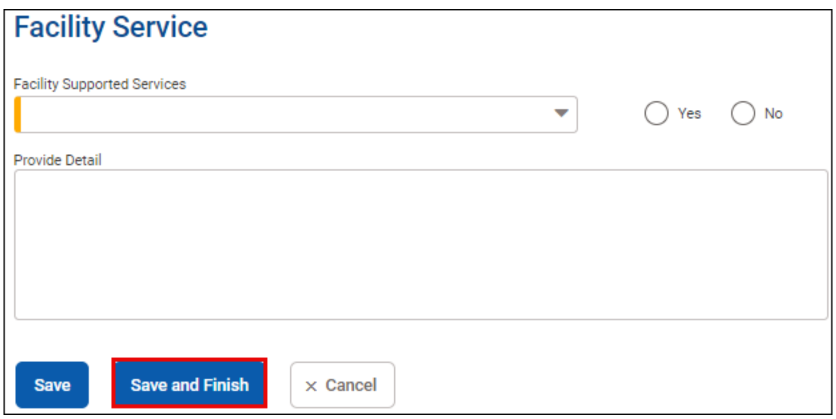



*Figure 152: Facility Supported Services*

5. Click **Save and Finish**.

Information entered on this screen will display under a state's waitlist **Facility Details** screen.

Navigate to the Facilities Details screen:

1. From the left navigation menu, click **State Waitlist**.
2. The State Waitlist Search screen will display.
3. **Search** for the agency in question.
    a. Results will display in the State Waitlist List section.
4. Click the **vertical ellipsis** to the right of the agency.
5. Click **Facility Details**.

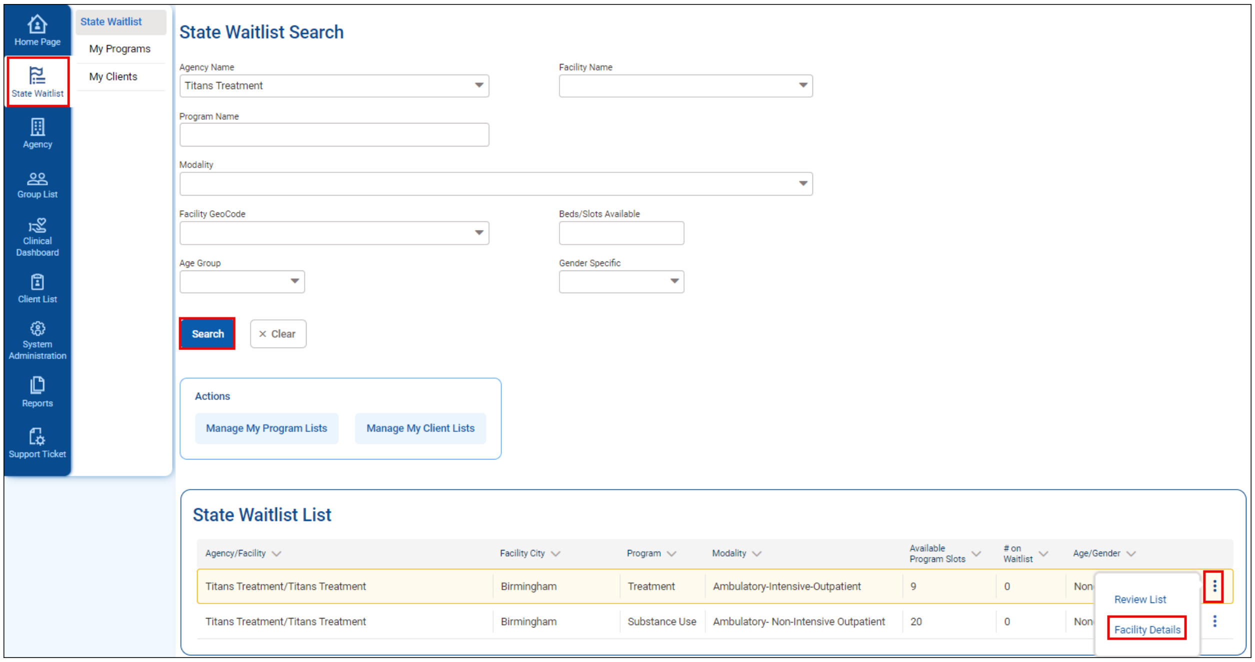



*Figure 153: Accessing Facility Details*

6. The screen will display showing Special Services and any General Information recorded.

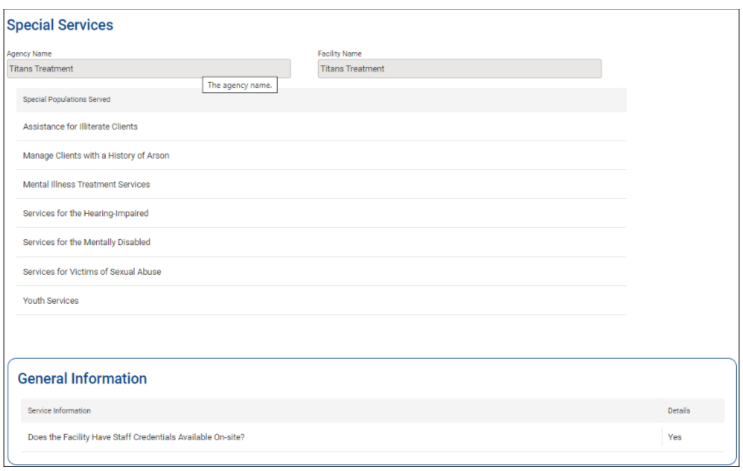



*Figure 154: Facility Details*

### 5.2.5. Addiction Services

Addiction Services can be identified here for a facility.

**NOTE:** The steps below assume the user has the facility active.

1. From the **Agency** submenu, click **Facility List** and then click **Addiction Services**.

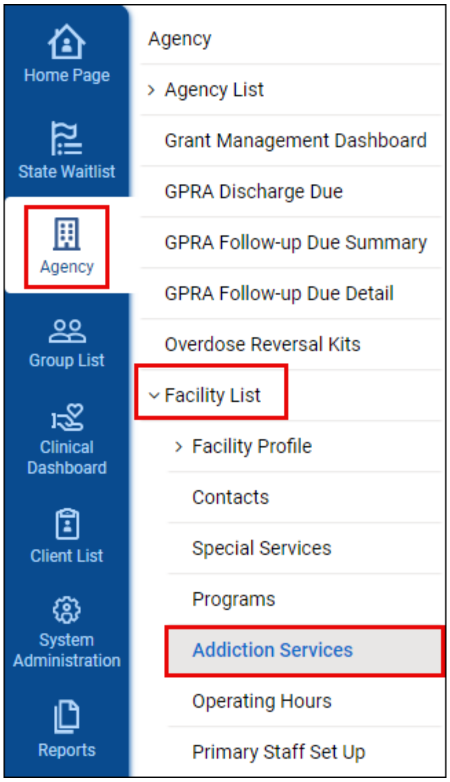



*Figure 155: Accessing Addiction Services*

2. The Addiction Services screen will display.

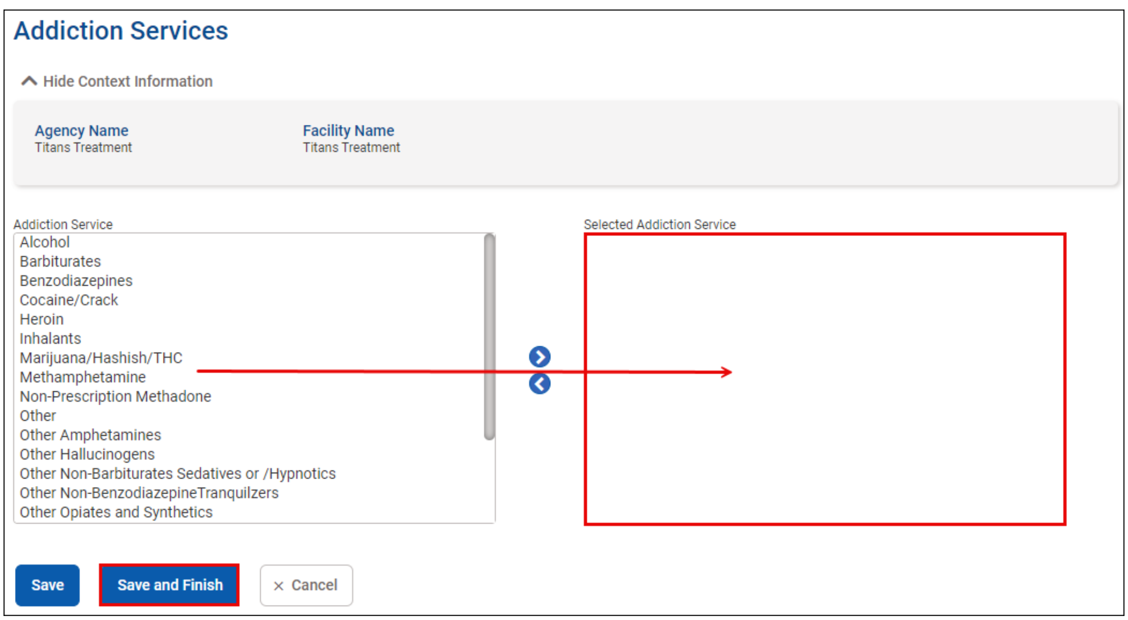



*Figure 156: Addiction Services*

3. Addiction services offered can be moved to the **Selected Addiction Service** section.
4. Click **Save and Finish** when done.

### 5.2.6. Operating Hours

This section is used to set the facility's operating hours. The following steps assume that the user has navigated to the appropriate facility record.

1. Under Agency > Facility List, click **Operating Hours**.

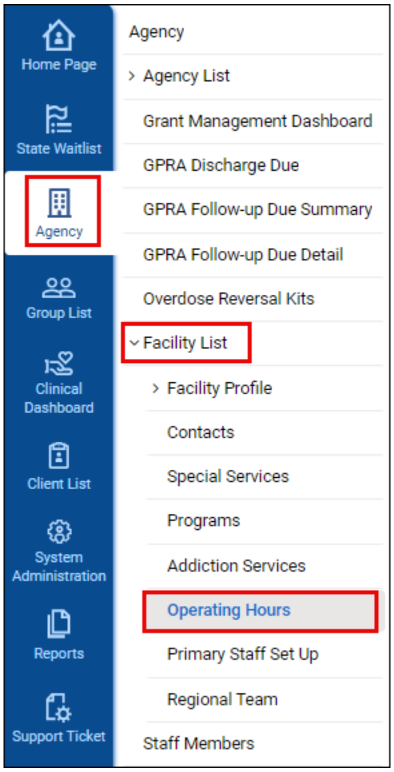



*Figure 157: Operating Hours*

2. The Facility Operating Hours screen displays.
3. Set the operation times for each day.
    a. Multiple time ranges can be set if the facility is closed at certain times throughout the day.
    b. Click **Set Tuesday to Friday same as Monday** to make those days match Monday.
4. Set the Months of Operation.

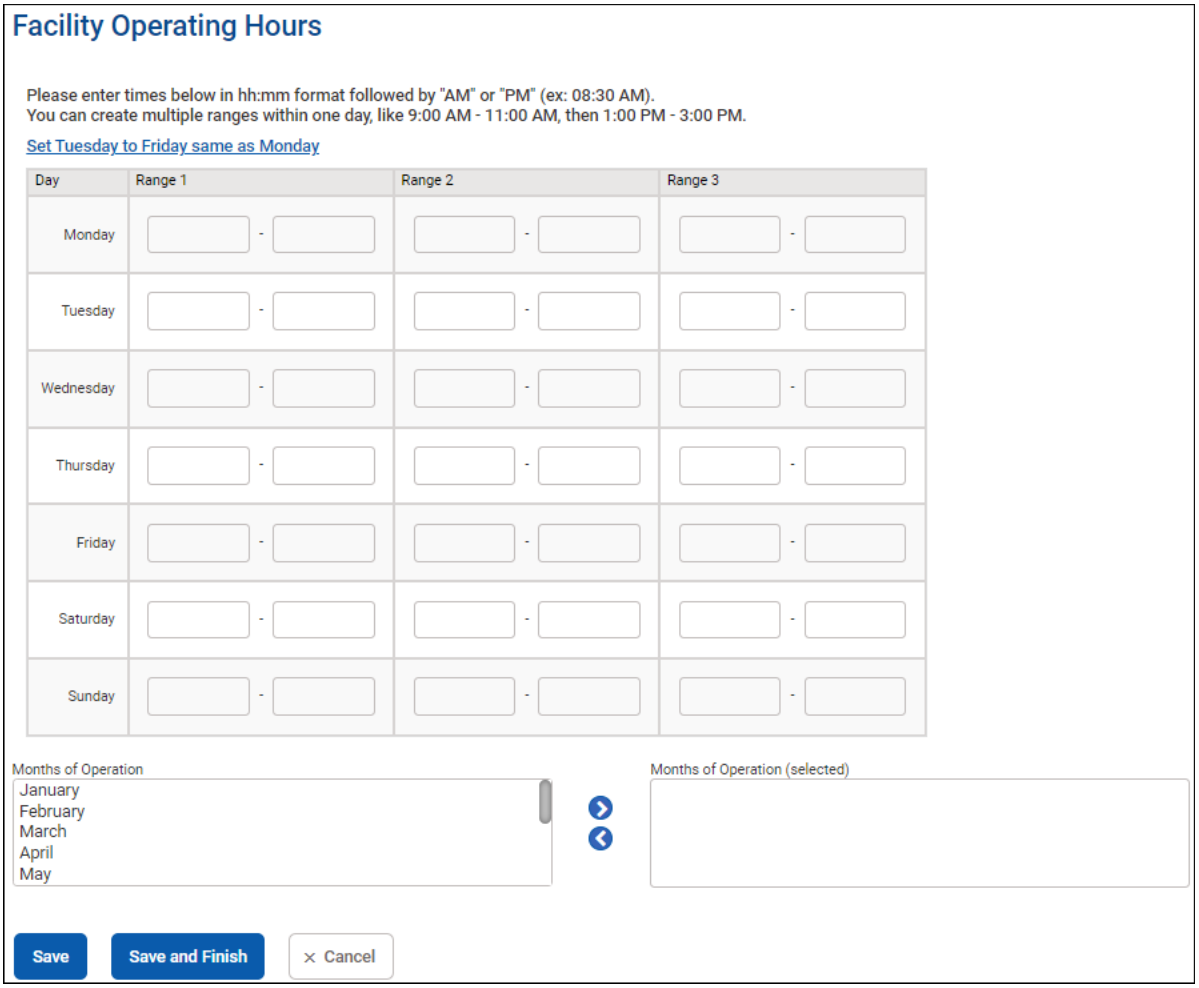



*Figure 158: Facility Operating Hours*

5. Click **Save and Finish**.

### 5.2.7. Primary Staff Setup

Staff set-up here will show on the Clinical Dashboard when filtering by Primary Staff in the **Display Results For** field.

To set-up the primary staff:

1. From the Agency submenu, click Facility List and then click Primary Staff Set Up.

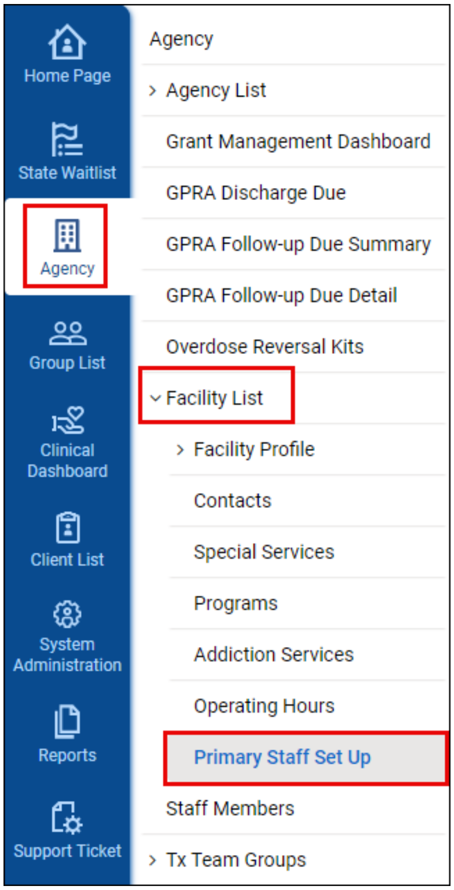



*Figure 159: Accessing Primary Staff Set Up*

2. The Primary Staff Set Up screen will display.
    a. Set values as necessary.

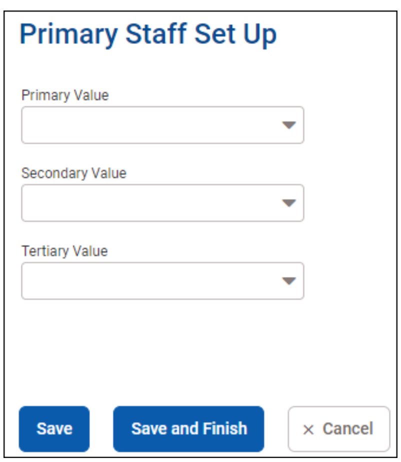



*Figure 160: Primary Staff Set Up*

3. Click **Save and Finish**.

## 5.3. Staff Management

See State – Staff Management for information on creating and managing staff members.

## 5.4. Contract Management

Contract Management menus are only read-only for provider administrators.

To view the agency's contract with the state:

1. From the left Navigation Menu, click **Agency**.

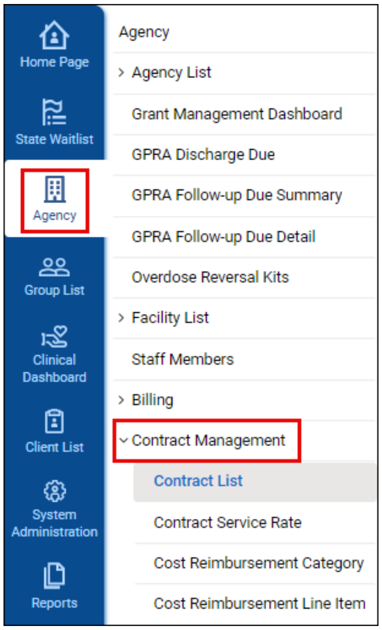



*Figure 161: Contract Management Navigation*

2. Click **Contract Management** in the sub-menu.
3. The Contract Search screen displays.
    a. Provider Agency field will already be populated.
4. Click **Search** to display agency's contract(s) in the Contract List section.

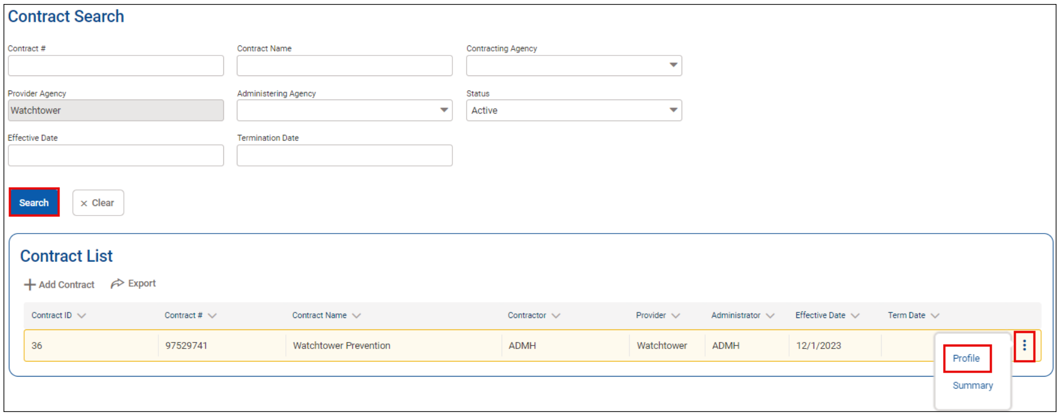



*Figure 162: Contract Search*

5. To review the contract, click the **vertical ellipsis** and then click **Profile**.

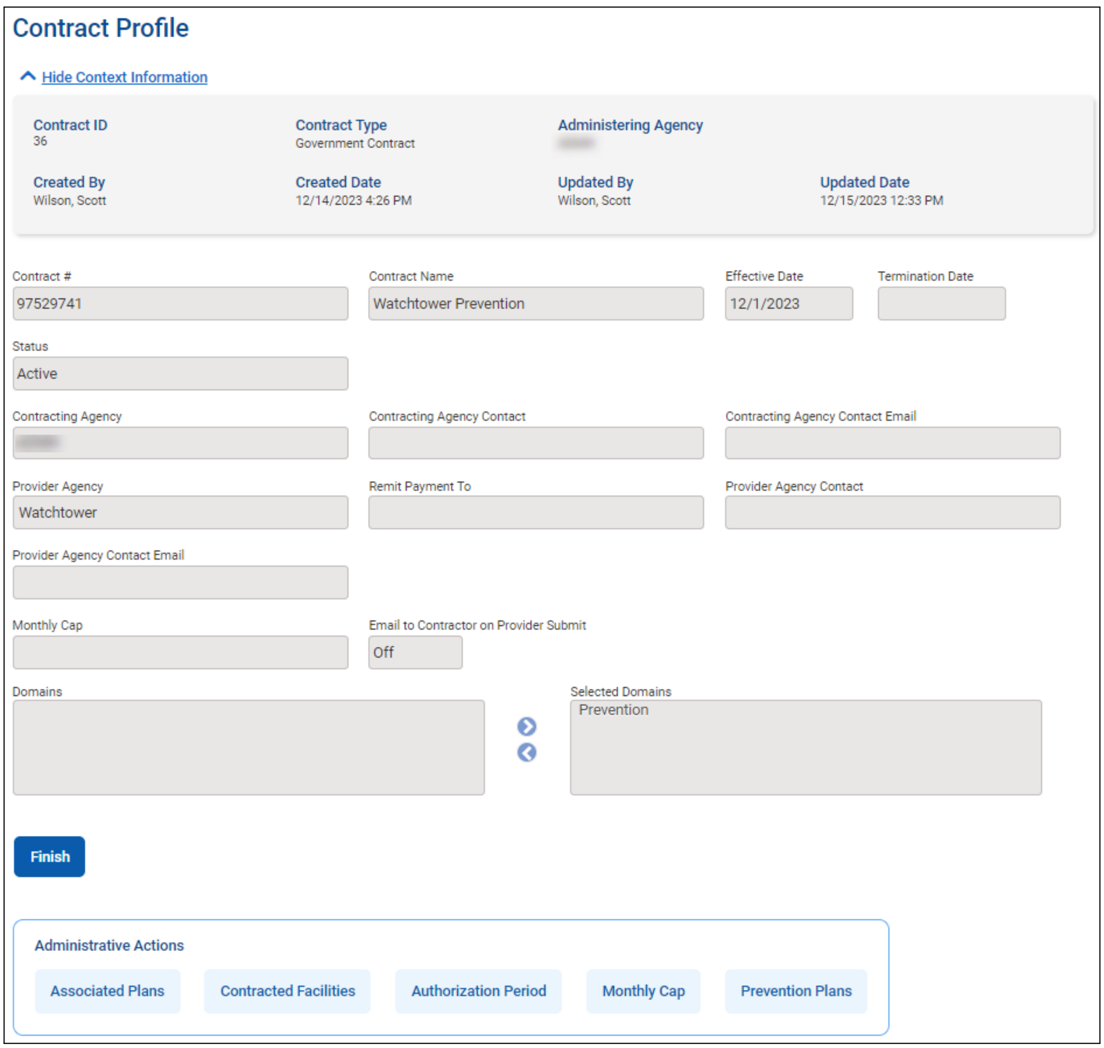



*Figure 163: Locked Contract Profile*

6. All fields on this screen and those under Administrative Actions can be viewed but will be locked.
7. Click **Finish** to exit the profile.

## 5.5. Treatment Teams

If desired an agency can establish treatment teams.

1. From the **Agency** submenu, click **Tx Team Groups**.

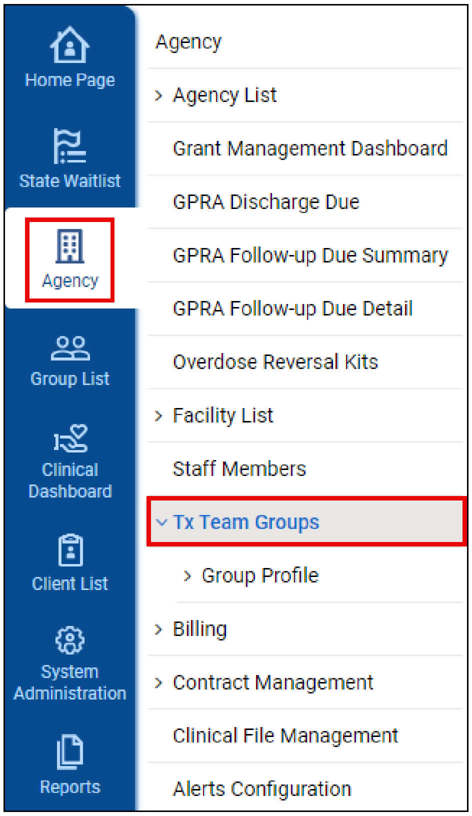



*Figure 164: Accessing Tx Team Groups*

2. The Treatment Team Group List screen will display.
    a. Existing teams will be listed here.


*Figure 165: Treatment Team Group*

3. Click **+Add New Treatment Team Group Record**.

4. The Treatment Team Group Profile screen will display.
5. Complete the required and relevant fields.
    a. Group End Date only needs to be set if the team is no longer active and available after a certain date.

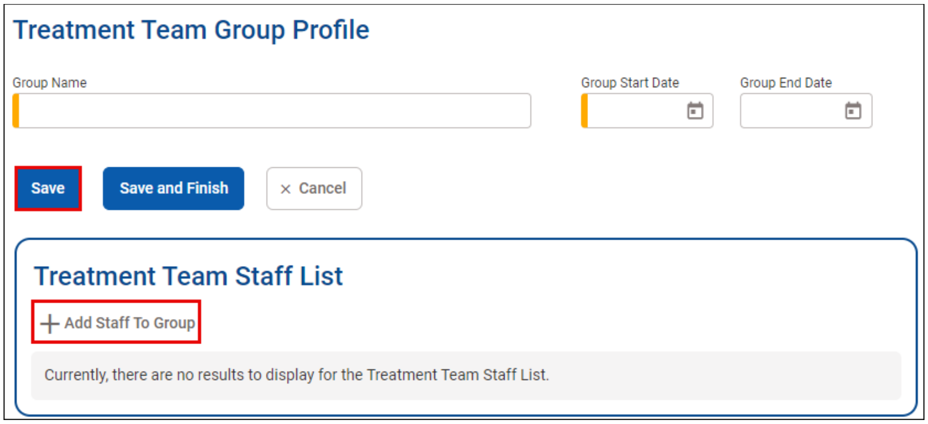



*Figure 166: Treatment Team Group Profile*

6. Click **Save**.
7. Click **+Add Staff to Group**.
8. The Treatment Team Group Staff screen will display.
    a. Treatment team members do not have to be staff at the agency.
    b. Collateral contacts can also be assigned.
9. Set the required fields and click **Save**.

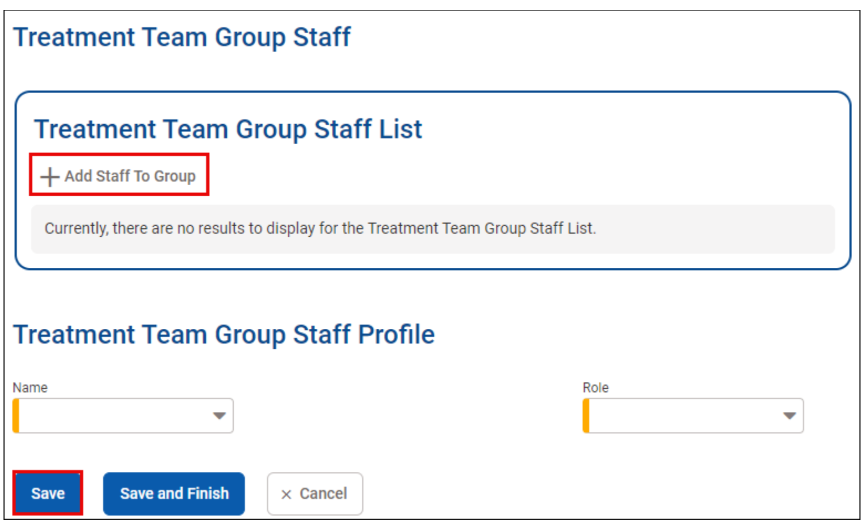



*Figure 167: Adding Members to Team Group*

10. As needed, click **+Add Staff to Group** to add more members to the treatment team.
    a. Click **Save** after every addition.
11. Once all changes have been made click **Finish**.
12. Click **Save and Finish** on the Treatment Team Group Profile screen.

# 6. SYSTEM ADMINISTRATION

## 6.1. Code Tables

WITS makes use of code tables to create flexibility within each State’s implementation. There are over 150 code tables within WITS that can be modified by the WITS Administrator.

Once data has been added to the code table, the new value will be available to select within the associated field(s).

**NOTE:** If values for fields on **Workspace** screens need to be edited, the WITS Administrator will need to contact WITS Support team (support@witsweb.org).

**NOTE:** Certain values have a negative ID number (e.g., -101). These are linked to business rules and cannot be edited by WITS Administrators.

1. From the left Navigation Menu, click System Administration.
2. In the sub-menu, click Code Tables.

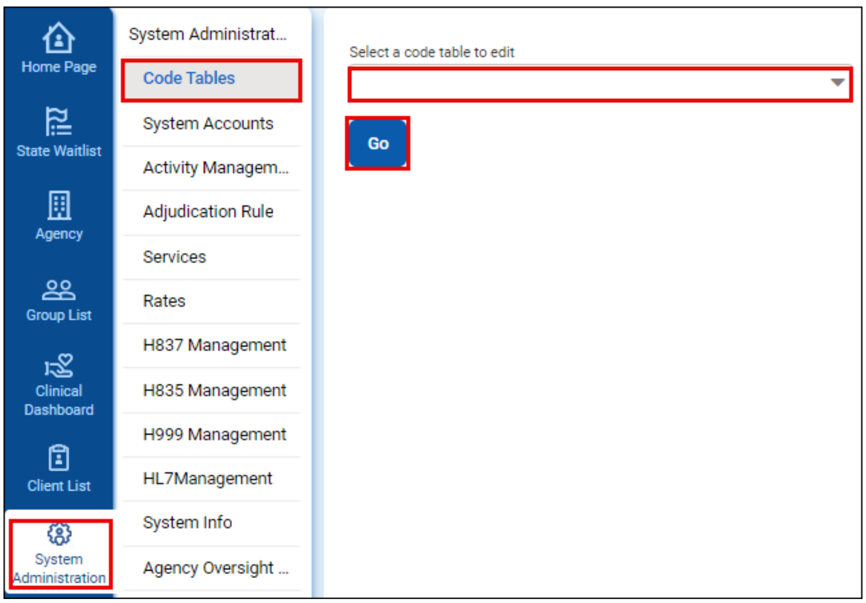
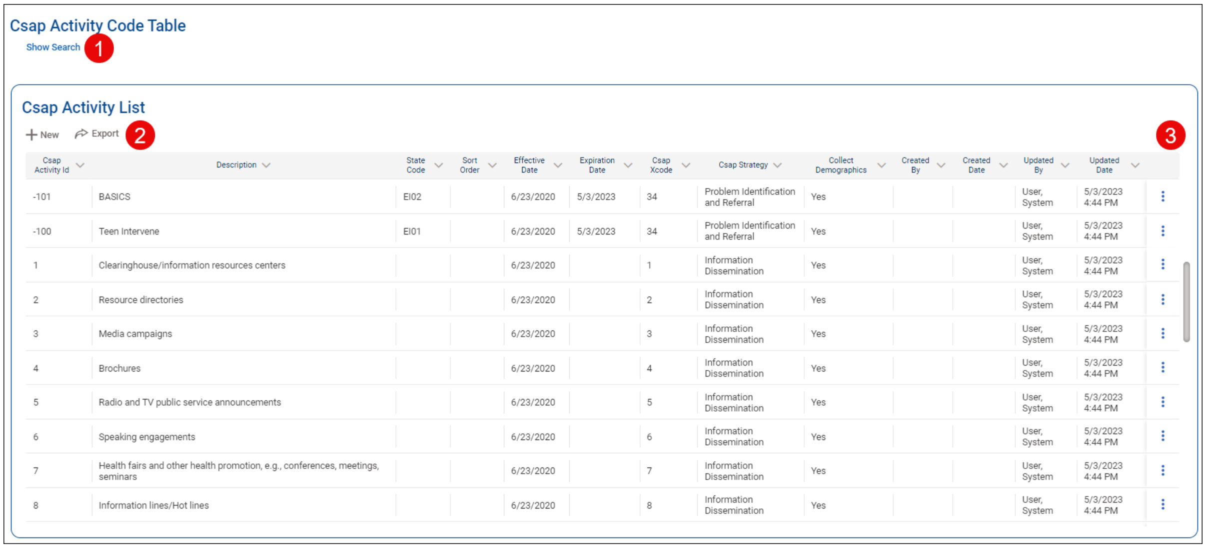



*Figure 168: Code Table Selection*

3. Choose the desired code table from the dropdown and then click **Go**.
4. The code table for the selection will display.



Csap Activity Code Table

Show Search 1

Csap Activity List

+ New Export 2

3

| Csap Activity Id | Description | State Code | Sort Order | Effective Date | Expiration Date | Csap Xcode | Csap Strategy | Collect Demographics | Created By | Created Date | Updated By | Updated Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| -101 | BASICS | EI02 | | 6/23/2020 | 5/3/2023 | 34 | Problem Identification and Referral | Yes | | | User, System | 5/3/2023 4:44 PM |
| -100 | Teen Intervene | EI01 | | 6/23/2020 | 5/3/2023 | 34 | Problem Identification and Referral | Yes | | | User, System | 5/3/2023 4:44 PM |
| 1 | Clearinghouse/information resources centers | | | 6/23/2020 | | 1 | Information Dissemination | Yes | | | User, System | 5/3/2023 4:44 PM |
| 2 | Resource directories | | | 6/23/2020 | | 2 | Information Dissemination | Yes | | | User, System | 5/3/2023 4:44 PM |
| 3 | Media campaigns | | | 6/23/2020 | | 3 | Information Dissemination | Yes | | | User, System | 5/3/2023 4:44 PM |
| 4 | Brochures | | | 6/23/2020 | | 4 | Information Dissemination | Yes | | | User, System | 5/3/2023 4:44 PM |
| 5 | Radio and TV public service announcements | | | 6/23/2020 | | 5 | Information Dissemination | Yes | | | User, System | 5/3/2023 4:44 PM |
| 6 | Speaking engagements | | | 6/23/2020 | | 6 | Information Dissemination | Yes | | | User, System | 5/3/2023 4:44 PM |
| 7 | Health fairs and other health promotion, e.g., conferences, meetings, seminars | | | 6/23/2020 | | 7 | Information Dissemination | Yes | | | User, System | 5/3/2023 4:44 PM |
| 8 | Information lines/Hot lines | | | 6/23/2020 | | 8 | Information Dissemination | Yes | | | User, System | 5/3/2023 4:44 PM |

*Figure 169: Code Table*

There are some actions that can be taken here.

1. **Show Search** – This action shows search options to identify a specific code within the table.
2. **+New** – This option will allow a new code to be added to the table.
3. **Vertical Ellipsis** – Clicking this allows the user to review (edit) or delete the code from the table.

To add a code to a table:

1. Click **+New**.
2. A section below the table becomes available.
3. Complete the required and relevant fields.
    a. The fields that are available here vary depending on the table selected.
4. Click **Save**.

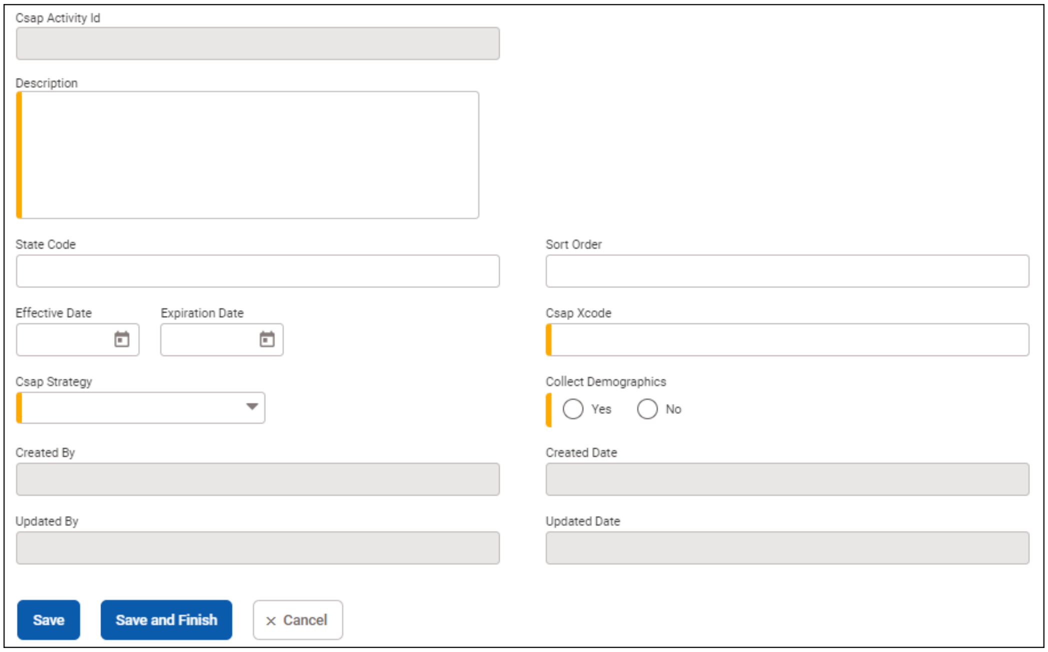



*Figure 170: Example Code Addition*

Code tables that might be managed for the treatment module are defined in the table below.

| Code Table | WITS Screen | WITS Field | Description |
|---|---|---|---|
| Age Group Specific Treatment | Payor Plan Group | Age Group | This is a list of available age groups. |
| Aid Type | Where? | Where? | Description |
| Covered Population | Payor Plan Group | Covered Population | Identifies the different groups that receive treatment services. |
| Modality Type | Multiple | Modality | This is used to filter the service dropdown on encounters. |
| Procedure | Service Profile | Procedure Code | Standardized medical code for services. |
| Procedure Modifier | Service Profile | Modifier | Codes that offer additional information about the set procedure code. |

## 6.2. System Accounts

Changes to user accounts at a system level are only performed by WITS Administrators. Changes made here affect the user account access across the entire WITS instance.

For example, giving a user access to a screen or module here grants that access across all agencies in the WITS instance.

1. From the left navigation menu, click **System Administration**.
2. In the sub menu, click **System Accounts**.

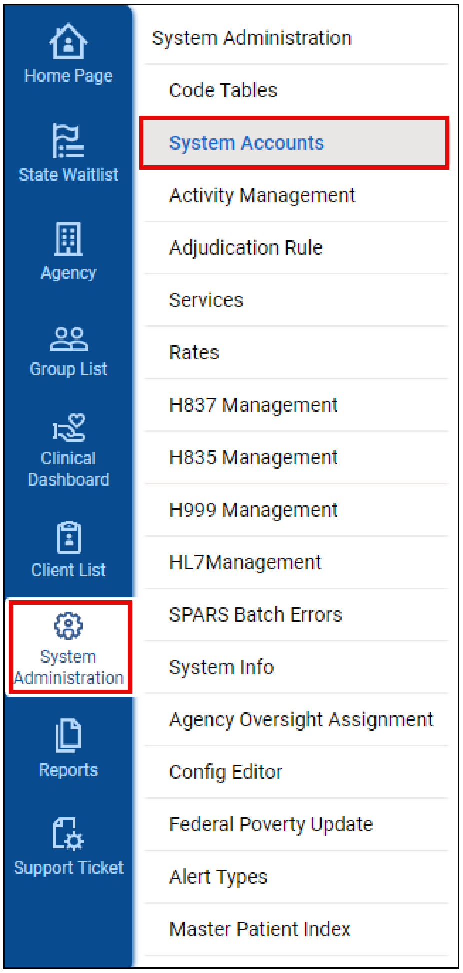



*Figure 171: Accessing System Accounts*

3. The **System Account Search** screen will display.
4. **Search** for the user record to be modified.
5. To the right of user, click the **vertical ellipsis** and then click **View Profile**.

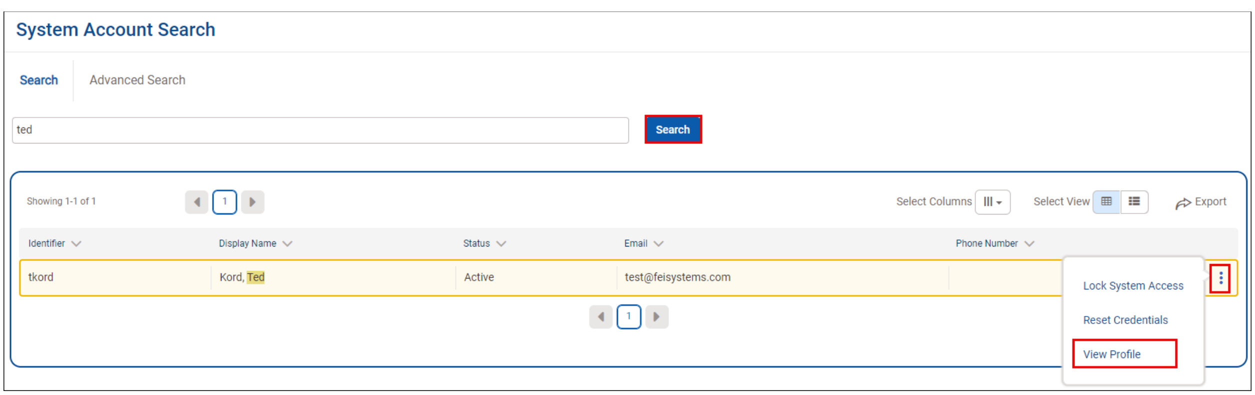



*Figure 172: System Account Search Screen*

6. The System Account Workspace will display.

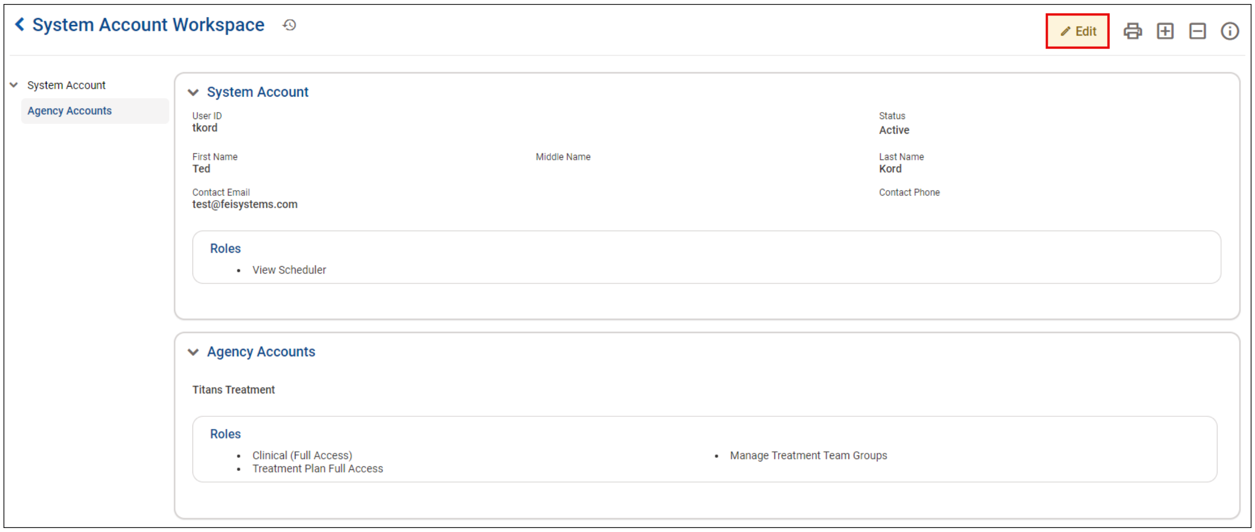



*Figure 173: System Account Workspace*

7. Click **Edit**.
8. Under the System Account section, click **+Manage Roles**.

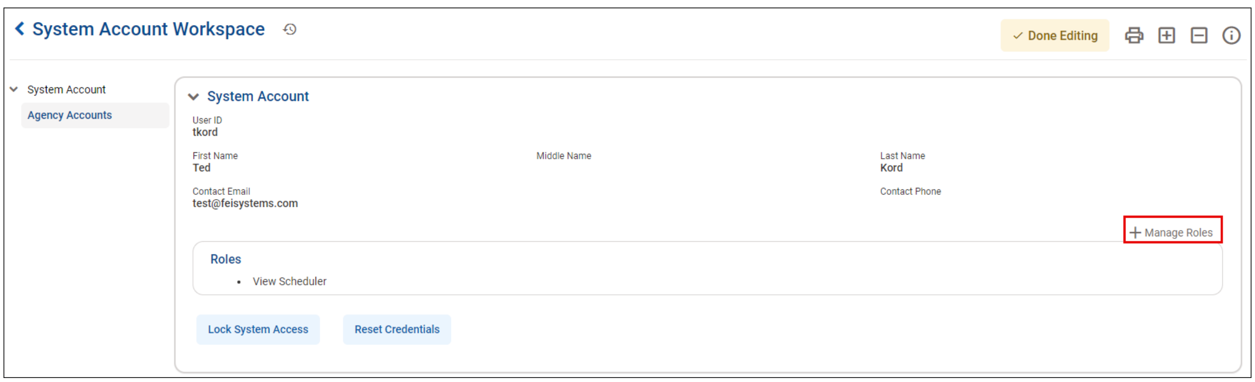



*Figure 174: System Account - Manage Roles*

9. The Roles screen will display.
10. Move the desired **Available Roles** to the **Assigned Roles** section.

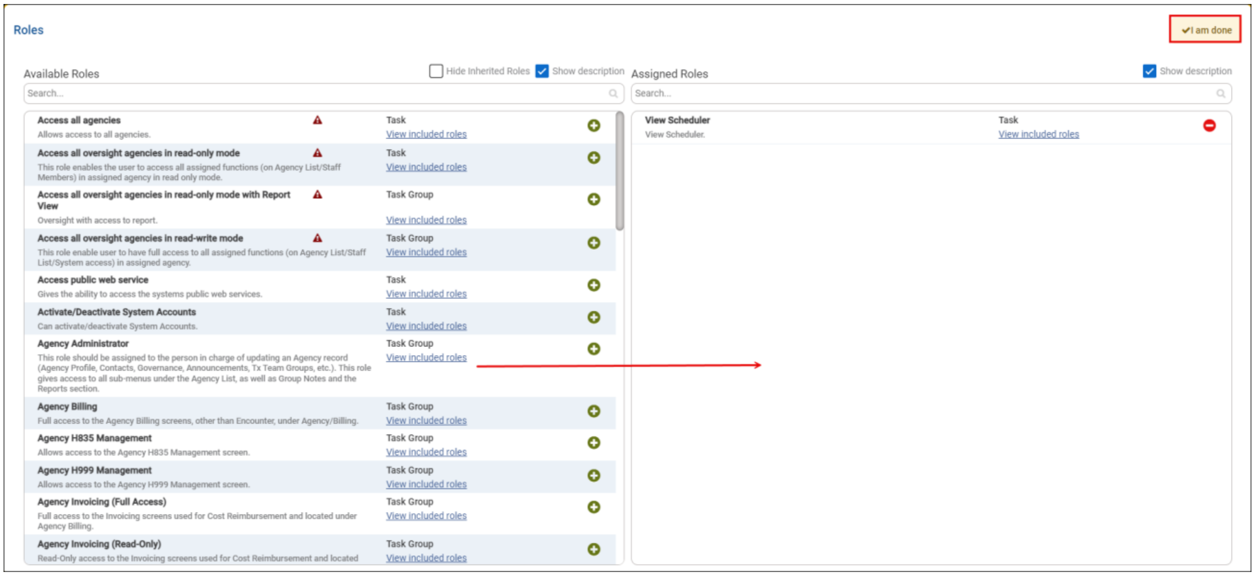



*Figure 175: Roles*

11. Click **I am done** once all desired roles are set.

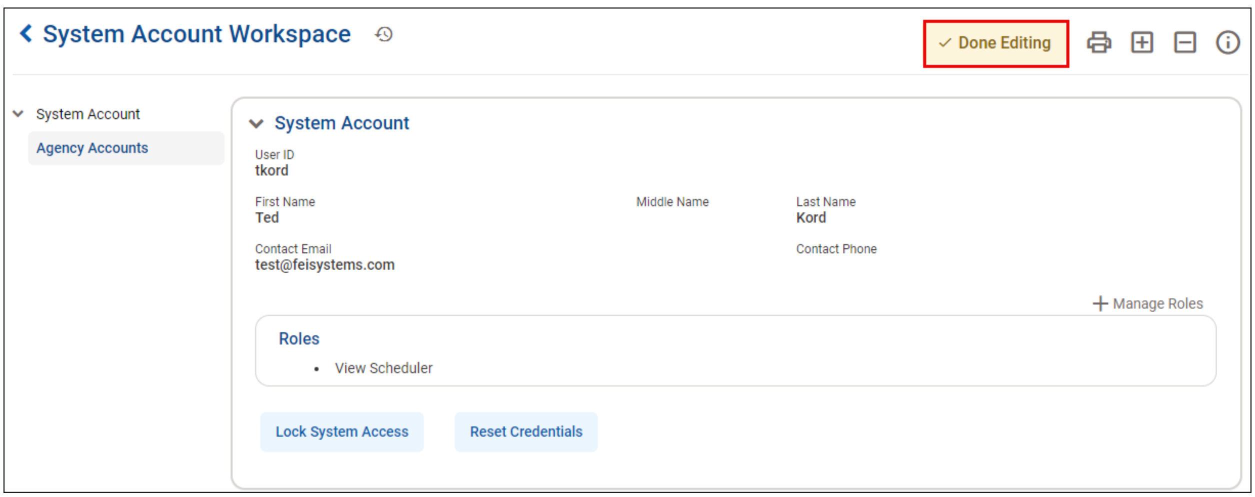



*Figure 176: Done Editing*

12. Click **Done Editing** once all changes are complete.

## 6.3. Activity Management

This screen will list all the possible activities that can display under the **Client** > **Activity List**.

**NOTE:** Contact FEI before making changes here, as changes will affect what is listed in the Activity List submenu and what items can be consented.

1. From the left navigation menu, click **System Administration**.
2. In the sub menu, click **Activity Management**.

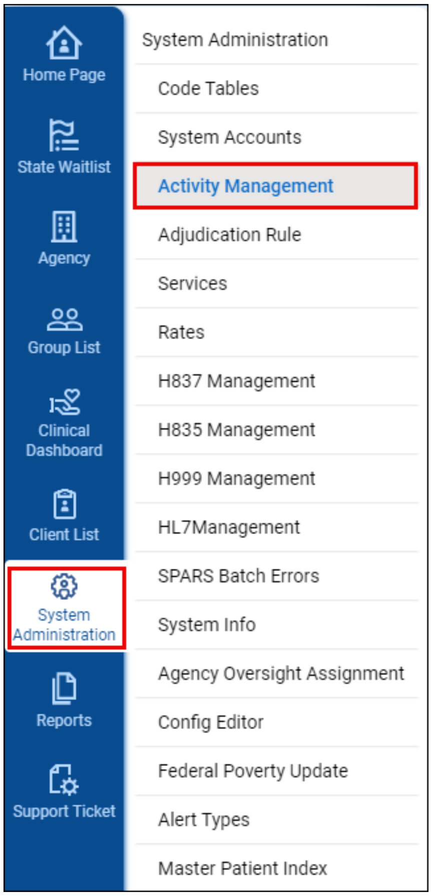
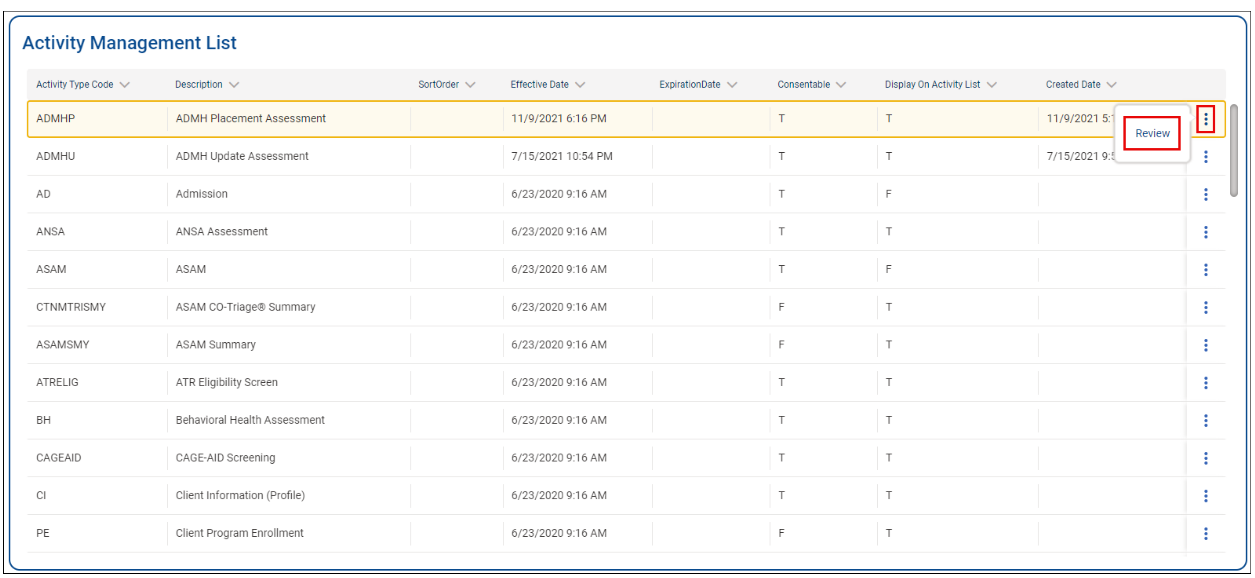



*Figure 177: Accessing Activity Management*

3. The Activity Management List screen will display.
4. To the right of the activity to be modified, click the **vertical ellipsis**, and then click **Review**.


Activity Management List

| Activity Type Code | Description | SortOrder | Effective Date | ExpirationDate | Consentable | Display On Activity List | Created Date |
|---|---|---|---|---|---|---|---|
| ADMHP | ADMH Placement Assessment | | 11/9/2021 6:16 PM | | T | T | 11/9/2021 5:1 |
| ADMHU | ADMH Update Assessment | | 7/15/2021 10:54 PM | | T | T | 7/15/2021 9:5 |
| AD | Admission | | 6/23/2020 9:16 AM | | T | F | |
| ANSA | ANSA Assessment | | 6/23/2020 9:16 AM | | T | T | |
| ASAM | ASAM | | 6/23/2020 9:16 AM | | T | F | |
| CTNMTRISMY | ASAM CO-Triage® Summary | | 6/23/2020 9:16 AM | | F | T | |
| ASAMSMY | ASAM Summary | | 6/23/2020 9:16 AM | | F | T | |
| ATRELIG | ATR Eligibility Screen | | 6/23/2020 9:16 AM | | T | T | |
| BH | Behavioral Health Assessment | | 6/23/2020 9:16 AM | | T | T | |
| CAGEAID | CAGE-AID Screening | | 6/23/2020 9:16 AM | | T | T | |
| CI | Client Information (Profile) | | 6/23/2020 9:16 AM | | T | T | |
| PE | Client Program Enrollment | | 6/23/2020 9:16 AM | | F | T | |

Review

*Figure 178: Activity Management List*

5. Scroll down to the Editing an Existing Item section.
    a. The only options available are to make the activity Consentable and be visible on the Activity List.

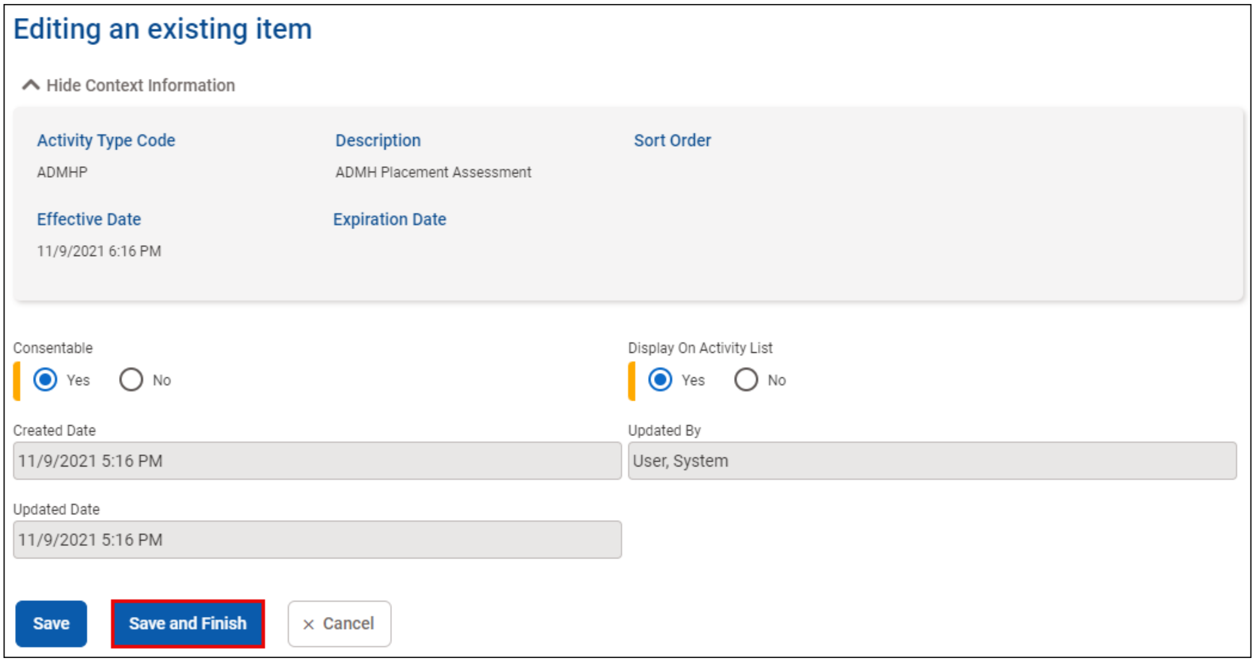



*Figure 179: Editing an Existing Item*

6. Click **Save and Finish**.

## 6.4. Services

This screen contains the master list of services used across all providers.

**NOTE:** Services are linked to procedure codes. If a new procedure code needs to be added for the service, the code table **Procedure** must be updated, first. See Code Tables for information on completing this step.

Click **System Administration** and then click **Services**. The Service Search screen will appear.

- By default, all services display under the Service List section.
- **Search** can be used to filter results.

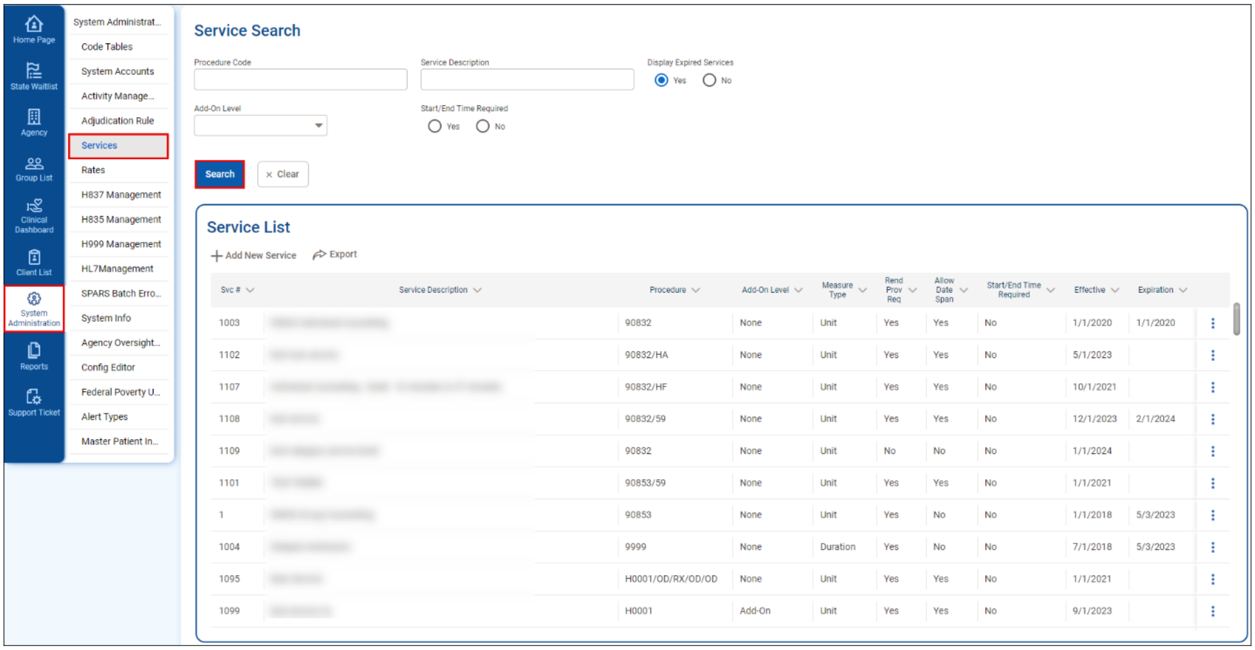



*Figure 180: System Admin – Services*

Here, services can be created, modified, or cloned.

To create a new service for providers to use:

1. Click **+Add New Service**.

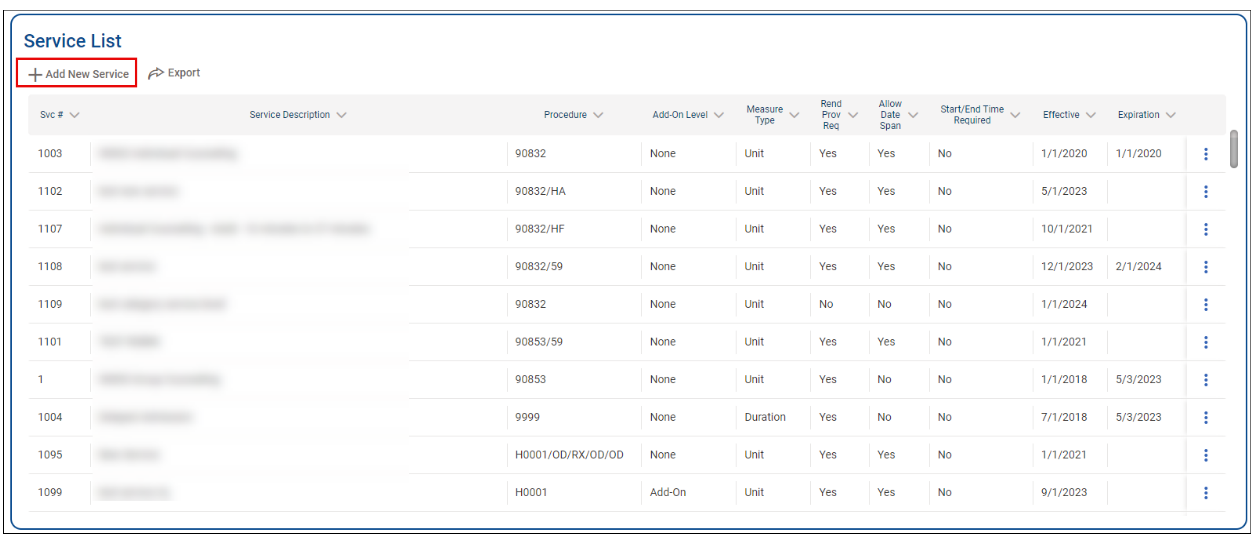



*Figure 181: Add Service*

2. The Service Profile screen will display.
3. Complete all required and relevant fields.

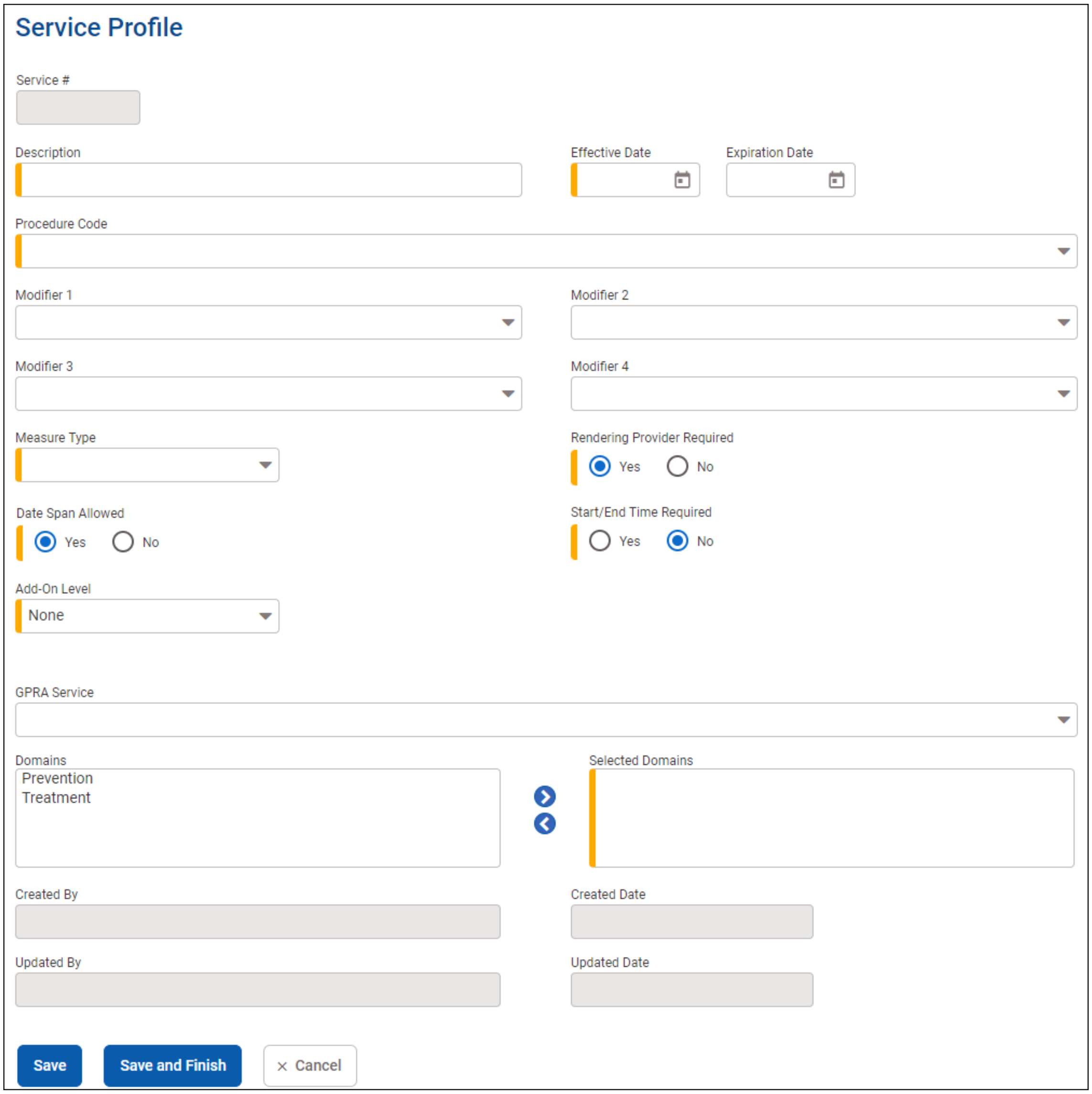



*Figure 182: Service Profile*

4. Click **Save and Finish**.

To edit or clone a service, click the **vertical ellipsis** to the right of the service, and then click the desired action.

- Both actions take the user to the Service Profile screen.
- **Profile** allows the user to edit an existing service.
- **Clone** will create a new service with all the information of the cloned service prepopulated.

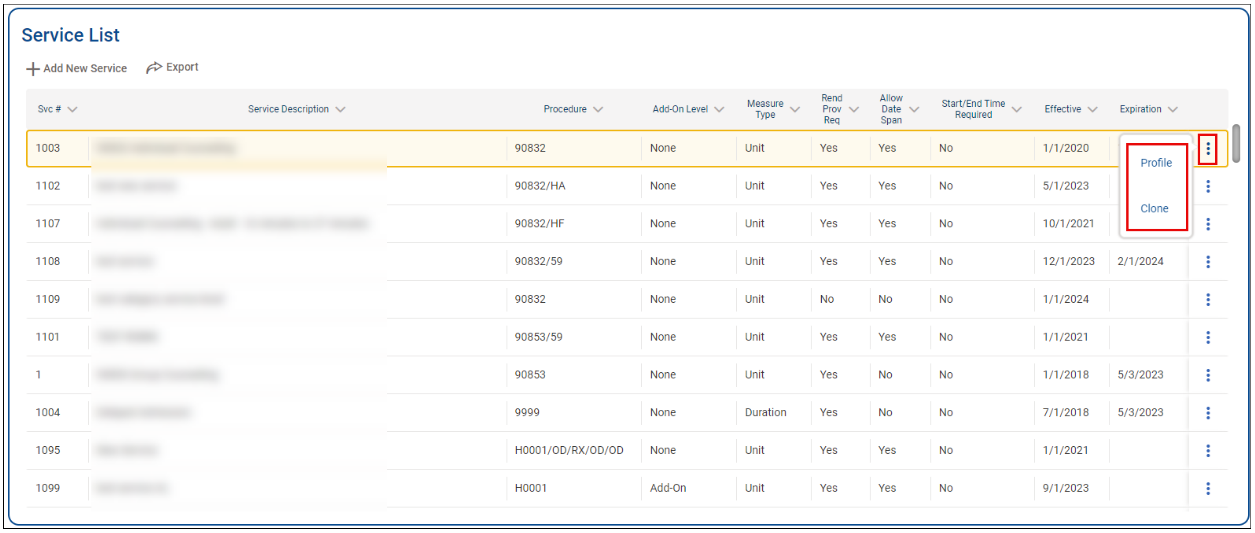



*Figure 183: System Admin - Service Actions*

For information on the different fields on the Service Profile screen, reference the table below.

*Table 13: Service Profile*

| Field | Description |
|---|---|
| Service # | This is a read-only field that is populated by the system when the service is created. |
| Description | The name of the service. This is what the end user sees when looking for the service. |
| Effective Date | This determines when the service will become available for use. |
| Expiration Date | If the service will no longer be used after a certain date, then set this field. Otherwise, leave it blank. **NOTE:** Services are not deleted, just made inactive by setting this field. |
| Procedure Code | This list presents all available procedure codes to be assigned to the service. |
| Modifier 1/2/3/4 | Modifier codes associated with the selected Procedure. Up to for modifiers can be added. The inputs allowed for these fields are managed by the code table **Procedure Modifier**. |
| Measure Type | This sets how the service time is measured: duration or unit. |
| Rendering Provider Required | If the provider performing the service is required, then this should be set to **Yes**. |
| Date Span Allowed | If the service could be administered over several days, set this to Yes. |
| Start/End Time Required | Set this if users should record when the service began and ended. |
| Add-On Level | This is set to yes if another service can be added to complete the service. For example, translation services being added to a consultative type of service. |

| Field | Description |
|---|---|
| GPRA Service | If this service will be linked to a GPRA service, choose the GPRA service from the dropdown. |
| Domains | Choose which domains can use this service. |
| Created/Updated Fields | These are read-only fields set by the system to identify who created/updated the service and the date created/updated. |

## 6.5. Rates

Once a service has been created, it will need to be associated with a rate.

**NOTE:** Rates here are used to bill from WITS to external entities, such as Medicaid or a TPL.

**NOTE:** For rates specific to government contract billing and payment, see Contract Service Rate.

Click **System Administration** and then click **Rates**. The Service Search screen will appear.

- By default, all services display under the Service List section.
- **Search** can be used to filter results.

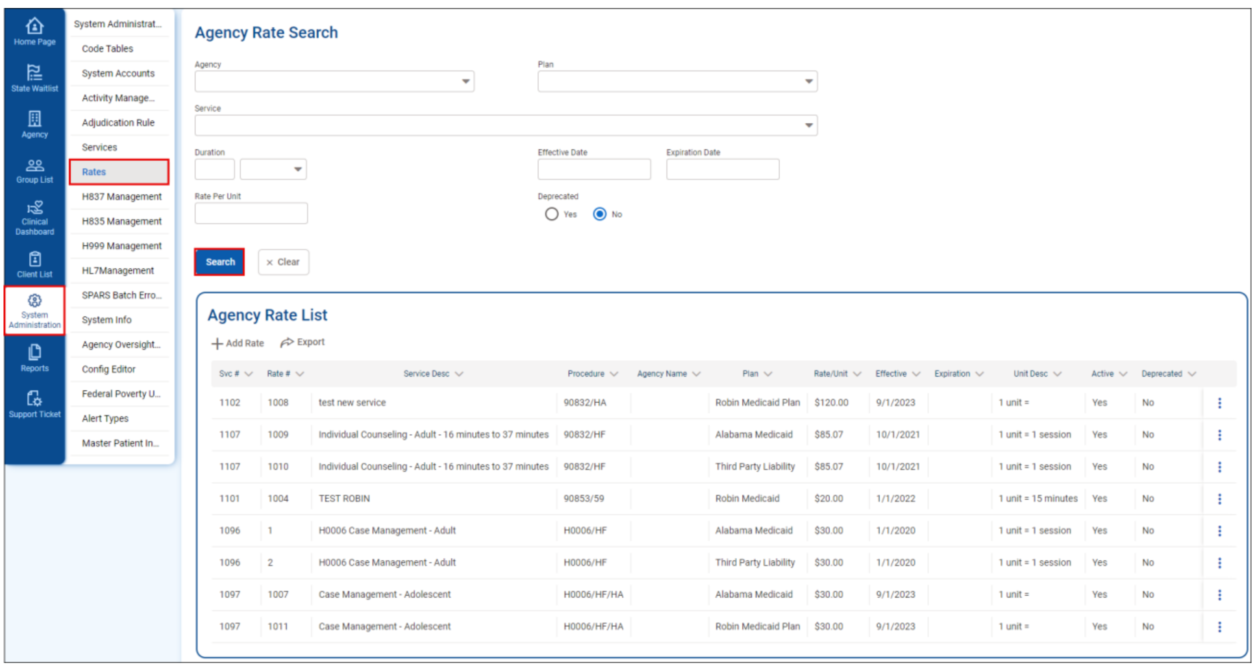
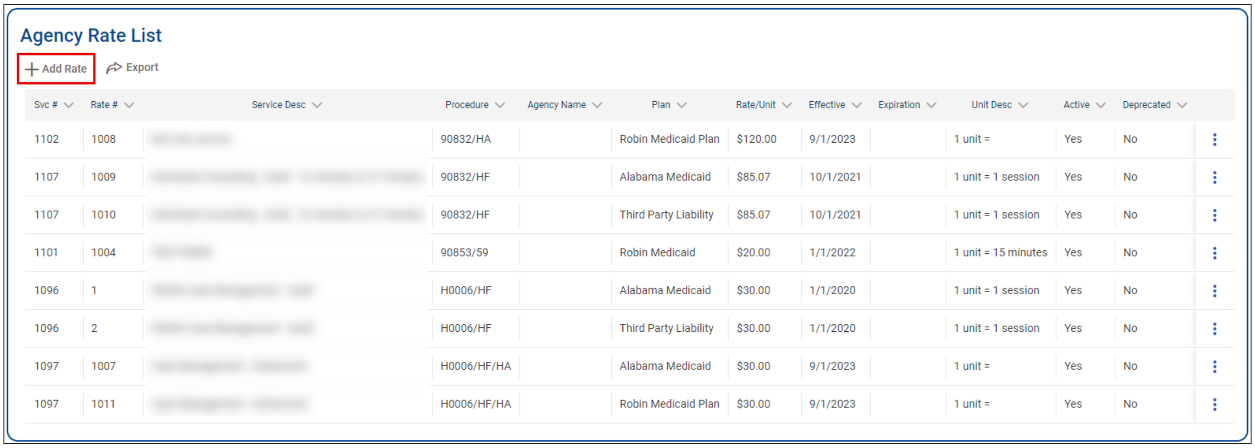



*Figure 184: Accessing Rates*

From this screen, rates can be created, modified, or cloned.

To create a new rate for a service:

1. Click **+Add Rate**.



Agency Rate List

Add Rate   Export

| Svc # | Rate # | Service Desc | Procedure | Agency Name | Plan | Rate/Unit | Effective | Expiration | Unit Desc | Active | Deprecated |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1102 | 1008 | [illegible] | 90832/HA | | Robin Medicaid Plan | $120.00 | 9/1/2023 | | 1 unit = | Yes | No |
| 1107 | 1009 | [illegible] | 90832/HF | | Alabama Medicaid | $85.07 | 10/1/2021 | | 1 unit = 1 session | Yes | No |
| 1107 | 1010 | [illegible] | 90832/HF | | Third Party Liability | $85.07 | 10/1/2021 | | 1 unit = 1 session | Yes | No |
| 1101 | 1004 | [illegible] | 90853/59 | | Robin Medicaid | $20.00 | 1/1/2022 | | 1 unit = 15 minutes | Yes | No |
| 1096 | 1 | [illegible] | H0006/HF | | Alabama Medicaid | $30.00 | 1/1/2020 | | 1 unit = 1 session | Yes | No |
| 1096 | 2 | [illegible] | H0006/HF | | Third Party Liability | $30.00 | 1/1/2020 | | 1 unit = 1 session | Yes | No |
| 1097 | 1007 | [illegible] | H0006/HF/HA | | Alabama Medicaid | $30.00 | 9/1/2023 | | 1 unit = | Yes | No |
| 1097 | 1011 | [illegible] | H0006/HF/HA | | Robin Medicaid Plan | $30.00 | 9/1/2023 | | 1 unit = | Yes | No |

*Figure 185: Add Rate*

2. The Agency Rate Profile screen will display.
    a. The Service Information section at the top of the screen will populate when the service is selected.
3. Complete all required and relevant fields.

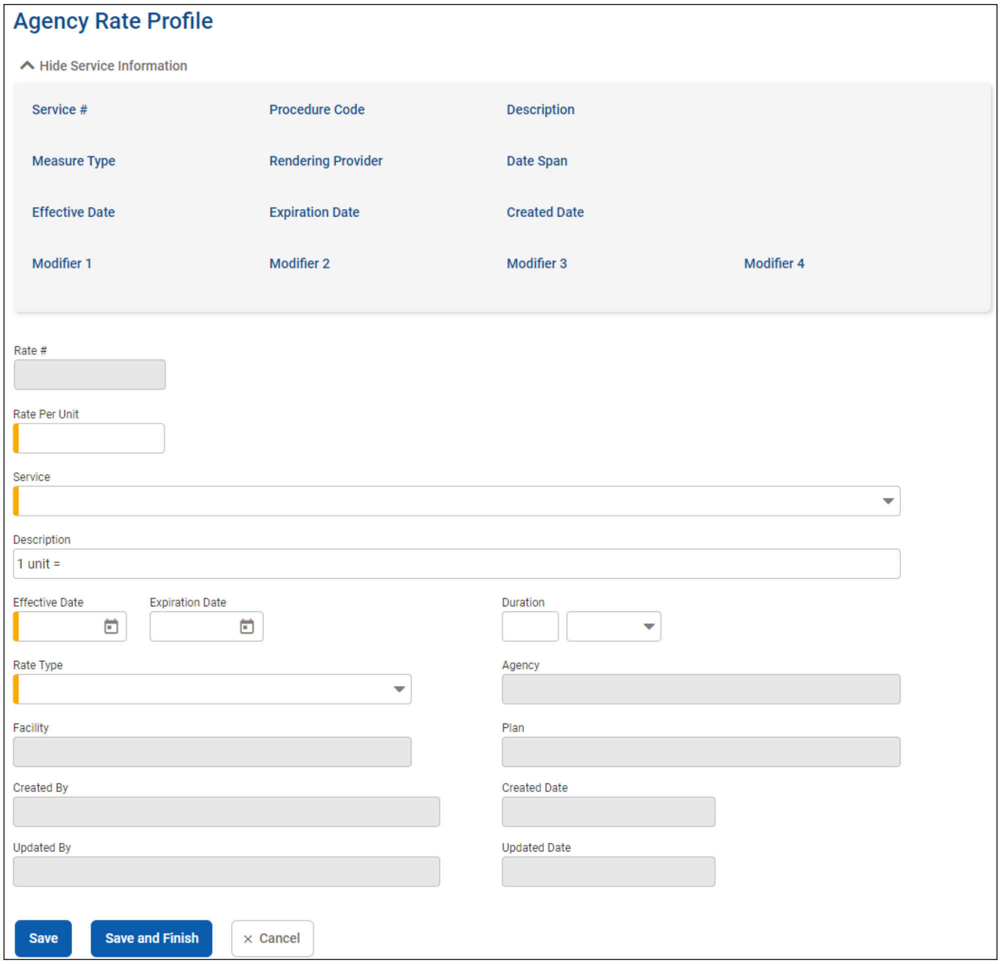



*Figure 186: Agency Rate Profile*

4. Click **Save and Finish**.

**NOTE:** Only one service can be associated to a rate. If the same rate information will be used for a group of services, use the **Clone** action to duplicate the rate, and then modify the Service field for the new service.

To edit or clone a rate, click the **vertical ellipsis** to the right of the service, and then click the desired action.

- Both actions take the user to the Service Profile screen.
- **Profile** allows the user to edit an existing service.
- **Clone** will create a new service with all the information of the cloned service prepopulated.

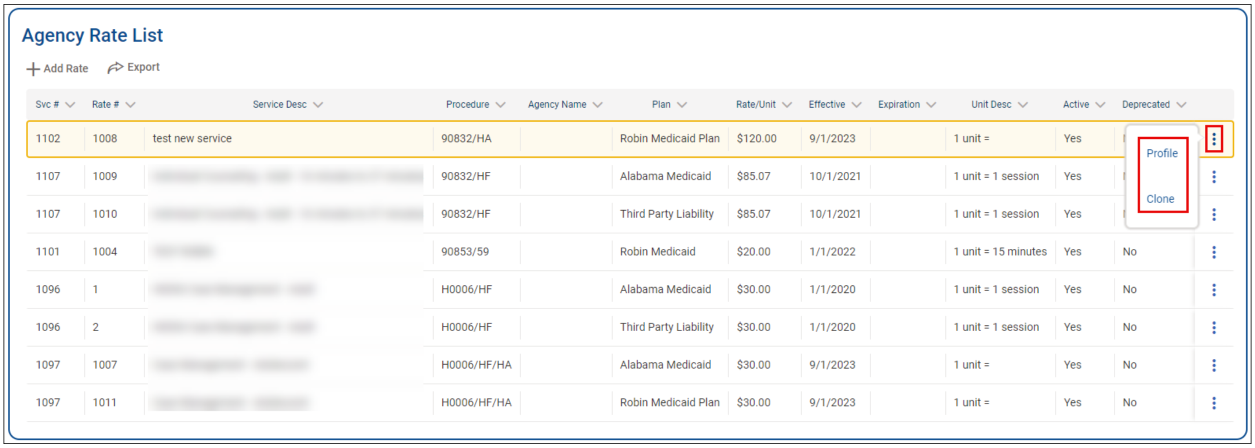



*Figure 187: System Admin - Rate Actions*

For information on the different fields on the Agency Rate Profile screen, reference the table below.

*Table 14: Agency Rate Profile*

| Field | Description |
|---|---|
| Rate # | This is a read-only field that is completed by the system when the service is created. |
| Rate Per Unit | This is the charge/rate amount per unit. |
| Service | The service to be linked to the rate.<br>**NOTE:** The service must be created before it can be associated with a rate. |
| Description | This field is used to define what a unit is. |
| Effective Date | This sets when the rate becomes available. |
| Expiration Date | If the rate will expire after a certain date, set the date here. Otherwise, leave this field blank. |
| Duration | The duration is determined by the service. |
| Rate Type | This identifies the type of rate. Most rates are set to Plan-Specific. Agency – Plan Specific and Agency – Standard are used when the rate is specific to an agency. |
| Agency | This field is used if the Rate Type is set to Agency – Plan Specific or Agency – Standard. Set the agency this rate will apply. |
| Facility | This field becomes active once the Rate Type is set. This only needs to be set if an Agency rate type is selected and the rate is specific to an agency's facility. |
| Plan | This field becomes active once the Rate Type is set. While not a required field, this should be set. |
| Created/Updated Fields | These are read-only fields set by the system to identify who created/updated the service and the date created/updated. |

## 6.6. SPARS Batch Errors

This screen displays errors returned from Substance Abuse and Mental Health Services Administration's (SAMHSA's) Performance Accountability and Reporting System (SPARS) uploads.

## 6.7. System Info

This screen displays system information on the WITS Instance.


*Figure 188: System Info*

## 6.8. Agency Oversight Assignment

**NOTE:** Only users with an Agency Oversight role assigned to their account will be listed on this screen.

**NOTE:** Agencies do not need to be assigned to users with the WITS Administrator role.

This screen allows an admin to set the agencies a user is able to access.

1. From the left navigation menu, click **System Administration**.
2. In the submenu, click **Agency Oversight Assignment**.

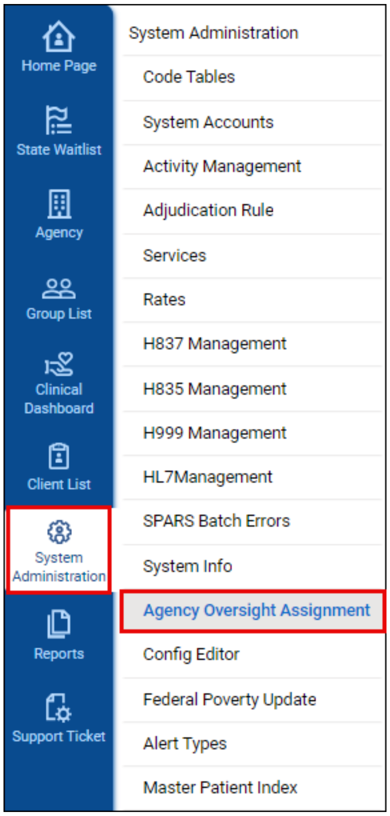



*Figure 189: Accessing Agency Oversight*

3. The Agency Oversight Assignment scree will display.
4. Set all fields.
   a. **Staff Agency** – This is the agency where the user account was created and initially assigned.
   b. **Staff** – Choose the user in question.
      i. Only users with an Agency Oversight role will display in this list.
   c. Move agencies that the user is being granted access to the **Agencies Selected** box.
   d. Filtered Access – Choose whether the user's access will be filtered.

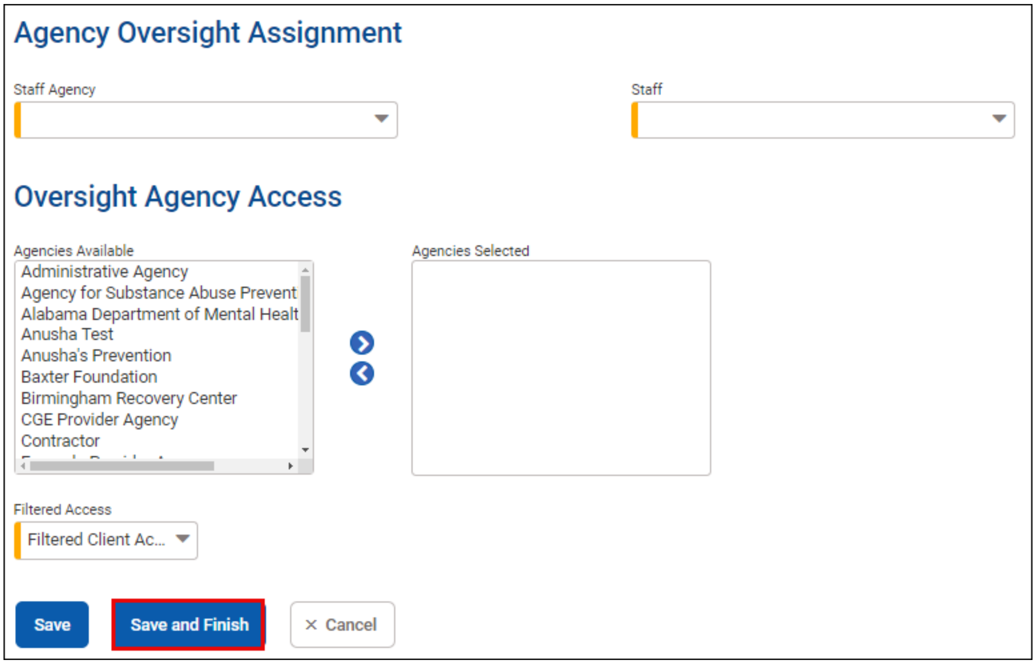



*Figure 190: Agency Oversight Assignment*

5. Click **Save and Finish**.

## 6.9. Alert Types

This is where all the different alert types exist. Information is provided on what the alert is, how it is triggered, and who receives the alert.

**NOTE:** The alert type must be enabled here before an alert can be configured. See Alerts Configuration.

To navigate, click on **System Administration** from the left navigation menu and then click **Alert Types**.

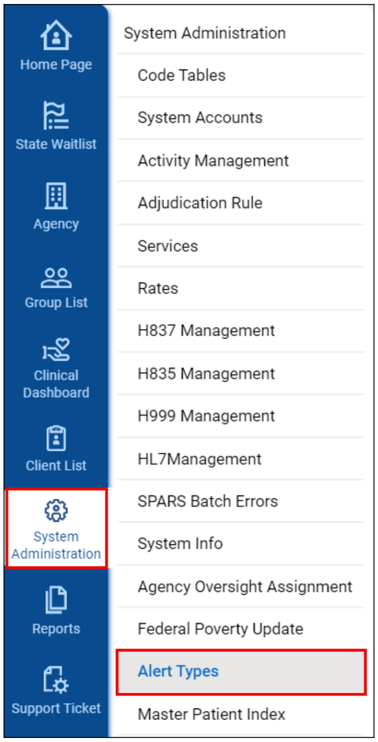
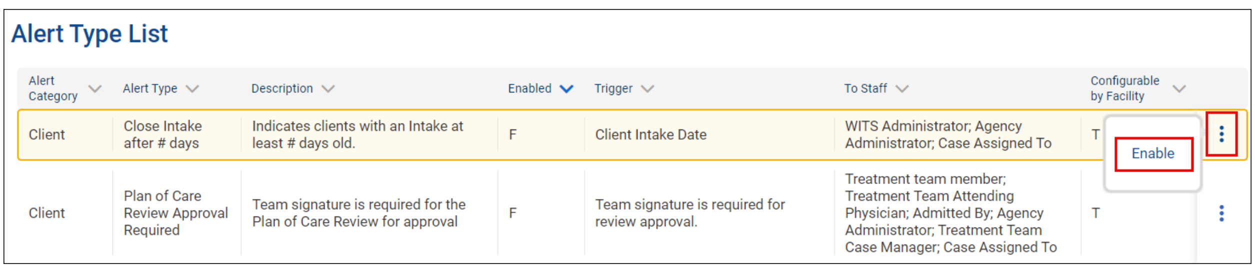



*Figure 191: Accessing Alert Types*

A WITS administrator is only able to **Enable**/**Disable** the alert type. To do so, hover over the vertical ellipsis and click **Enable** or **Disable**.


Alert Type List

| Alert Category | Alert Type | Description | Enabled | Trigger | To Staff | Configurable by Facility | |
|---|---|---|---|---|---|---|---|
| Client | Close Intake after # days | Indicates clients with an Intake at least # days old. | F | Client Intake Date | WITS Administrator; Agency Administrator; Case Assigned To | T | Enable |
| Client | Plan of Care Review Approval Required | Team signature is required for the Plan of Care Review for approval | F | Team signature is required for review approval. | Treatment team member; Treatment Team Attending Physician; Admitted By; Agency Administrator; Treatment Team Case Manager; Case Assigned To | T | |

*Figure 192: Enable/Disable Alert Type*

## 6.10. Master Patient Index

This screen allows the WITS administrator to search for a client record across all agencies. If a client record exists across multiple agencies, the WITS administrator can assign a state identifier to those records. This allows for searching by the state ID on the client search screen.

1. From the left navigation menu, click **System Administration**.

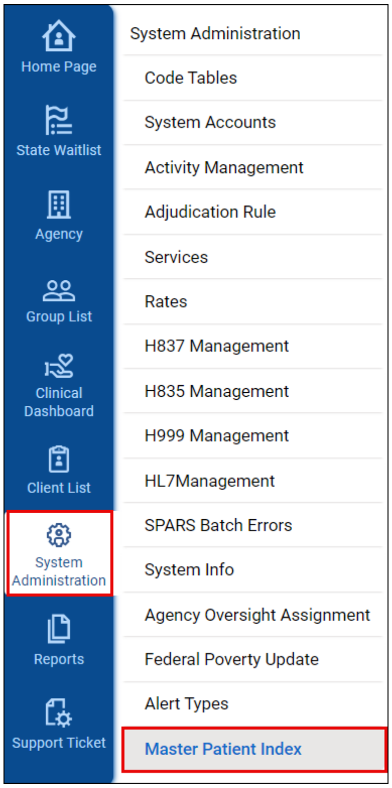



*Figure 193: Accessing Master Patient Index*

2. In the sub menu, click **Master Patient Index**.
3. The Master Patient Index Search screen will display.
4. Use the **Search** function to locate the client record.
    a. Results will display under the Client List section.

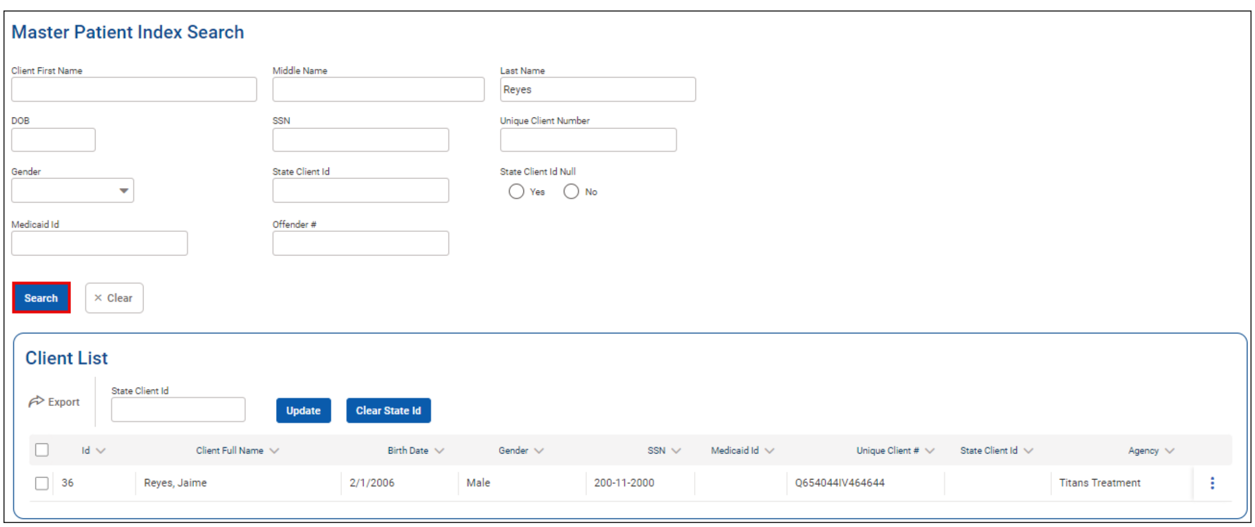



*Figure 194: Master Patient Index*

5. To add a State ID, **check the box** to the left of the client record(s).

6. Add a State Id in the **State Client ID** field.
7. Click **Update** to assign the ID to the client record(s).

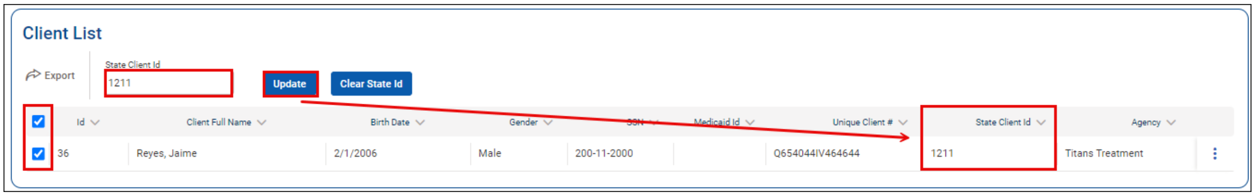



*Figure 195: Add State Client ID*

The State Client ID will display under its respective column.

To remove a State Client ID, **check the box** to the left of the client record(s), and then click **Clear State ID**.

There are other actions that can be performed by clicking the **vertical ellipsis** to the right of the patient record and then clicking one of the following:

- **MPI** – This will display the Master Patient Index Profile. This is a read-only screen providing identifying information on the client.

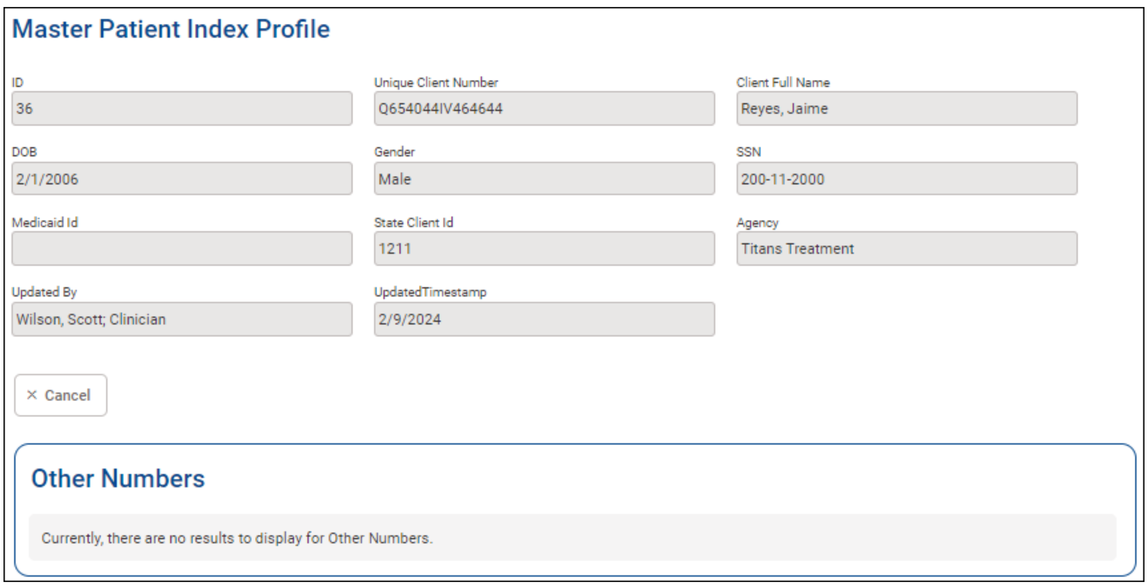



*Figure 196: Master Patient Index Profile*

- **Preview Client Summary** – This will open a new window providing a read-only view of the client profile.
- **Edit Client Profile** – This will take the user to the client's profile screen (Client List > Client Profile).

# 7. REPORTS

This module allows the user to generate data using pre-built reports in WITS.

From the left navigation menu, click **Reports**.

The Reports Search screen will display.

Reports are categorized for easy identification. The **Search** function can also be used to locate the desired report.

Hovering over a report will provide a description of the data available in the report.

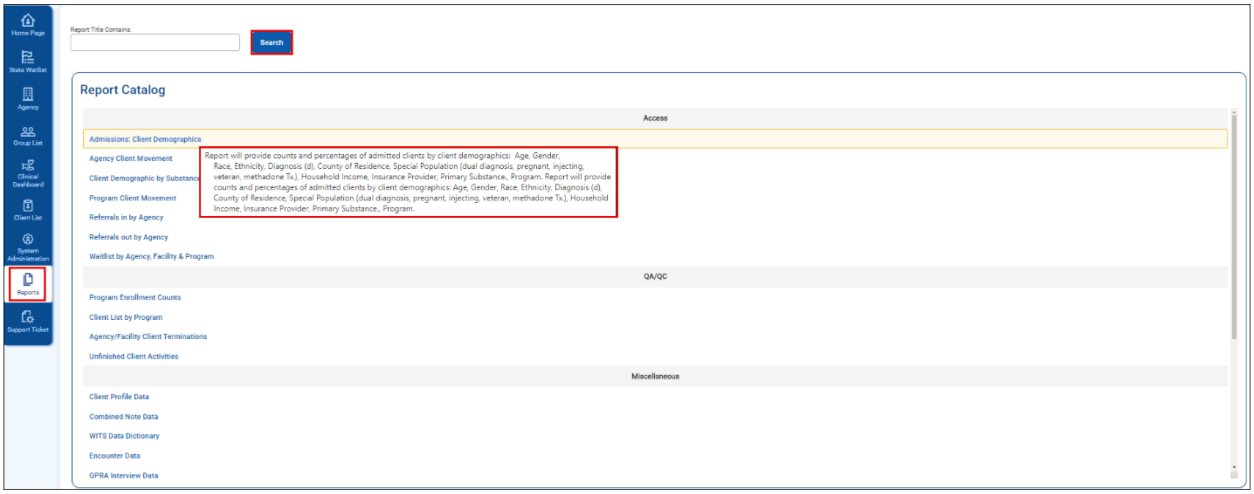



*Figure 197: Reports*

To run a report:

1. Click on the desired report.
2. Complete all required and relevant fields.
    a. Report fields will vary based on the report selected.
    b. As required fields are set, other fields may become required.

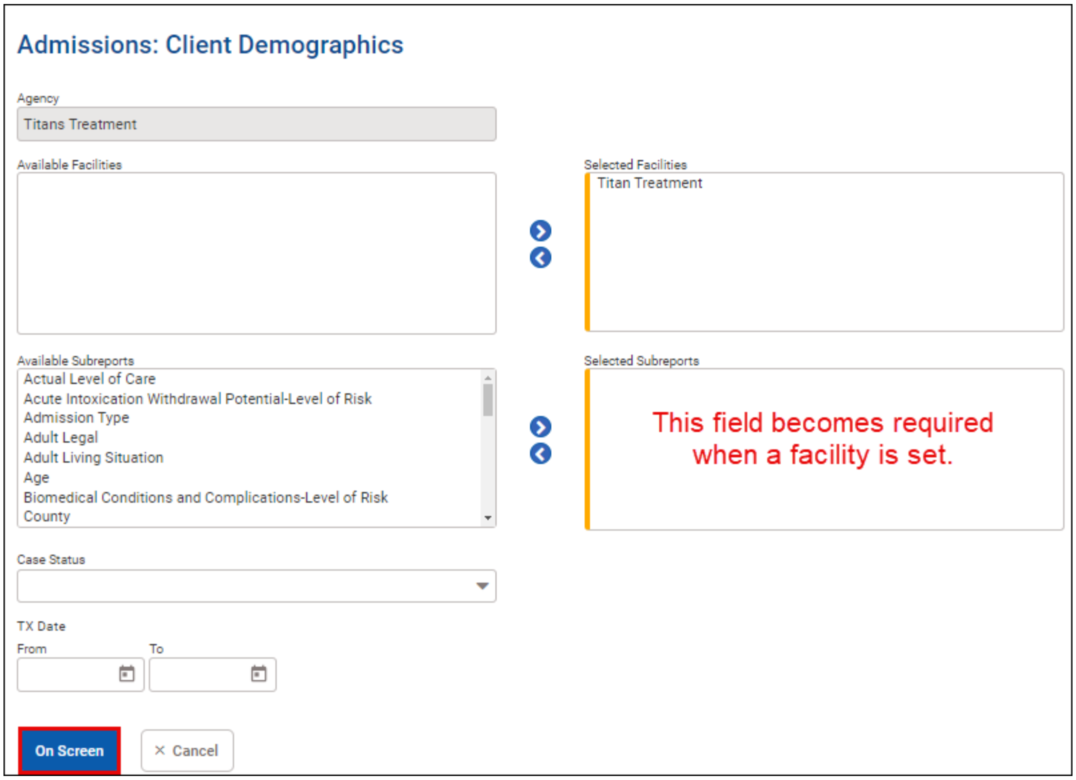
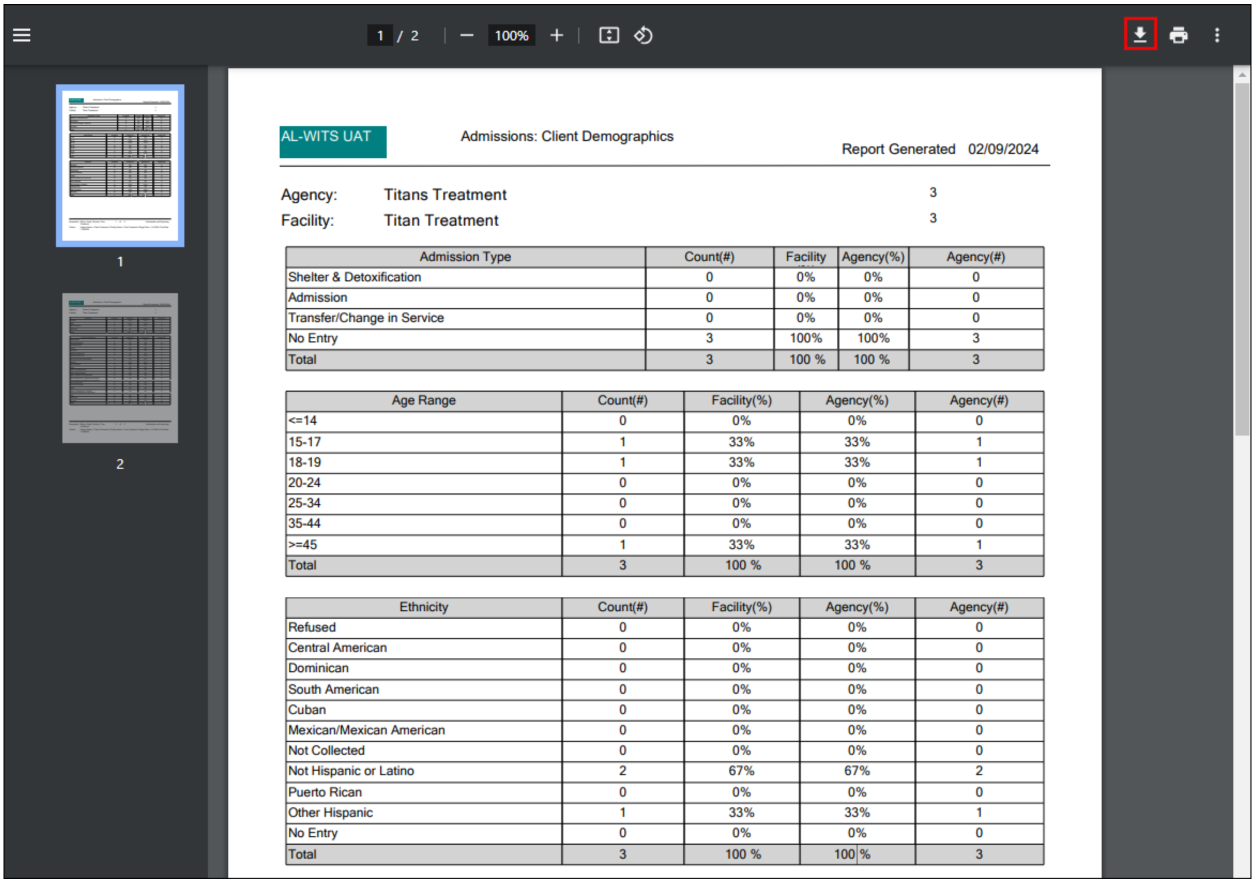



*Figure 198: Report Fields*

3. Click **On Screen**.
4. The report will open in a separate tab.



AL-WITS UAT

Admissions: Client Demographics

Report Generated 02/09/2024

Agency: Titans Treatment 3

Facility: Titan Treatment 3

| Admission Type | Count(#) | Facility | Agency(%) | Agency(#) |
|---|---|---|---|---|
| Shelter & Detoxification | 0 | 0% | 0% | 0 |
| Admission | 0 | 0% | 0% | 0 |
| Transfer/Change in Service | 0 | 0% | 0% | 0 |
| No Entry | 3 | 100% | 100% | 3 |
| Total | 3 | 100 % | 100 % | 3 |

| Age Range | Count(#) | Facility(%) | Agency(%) | Agency(#) |
|---|---|---|---|---|
| <=14 | 0 | 0% | 0% | 0 |
| 15-17 | 1 | 33% | 33% | 1 |
| 18-19 | 1 | 33% | 33% | 1 |
| 20-24 | 0 | 0% | 0% | 0 |
| 25-34 | 0 | 0% | 0% | 0 |
| 35-44 | 0 | 0% | 0% | 0 |
| >=45 | 1 | 33% | 33% | 1 |
| Total | 3 | 100 % | 100 % | 3 |

| Ethnicity | Count(#) | Facility(%) | Agency(%) | Agency(#) |
|---|---|---|---|---|
| Refused | 0 | 0% | 0% | 0 |
| Central American | 0 | 0% | 0% | 0 |
| Dominican | 0 | 0% | 0% | 0 |
| South American | 0 | 0% | 0% | 0 |
| Cuban | 0 | 0% | 0% | 0 |
| Mexican/Mexican American | 0 | 0% | 0% | 0 |
| Not Collected | 0 | 0% | 0% | 0 |
| Not Hispanic or Latino | 2 | 67% | 67% | 2 |
| Puerto Rican | 0 | 0% | 0% | 0 |
| Other Hispanic | 1 | 33% | 33% | 1 |
| No Entry | 0 | 0% | 0% | 0 |
| Total | 3 | 100 % | 100 % | 3 |

*Figure 199: Generated Report*

5. To download the report, click the **Download** icon.
6. Verify/Change the name of the report.
7. Choose the location where the report should be saved.
8. The file will save as a PDF unless the **File Type** is changed.

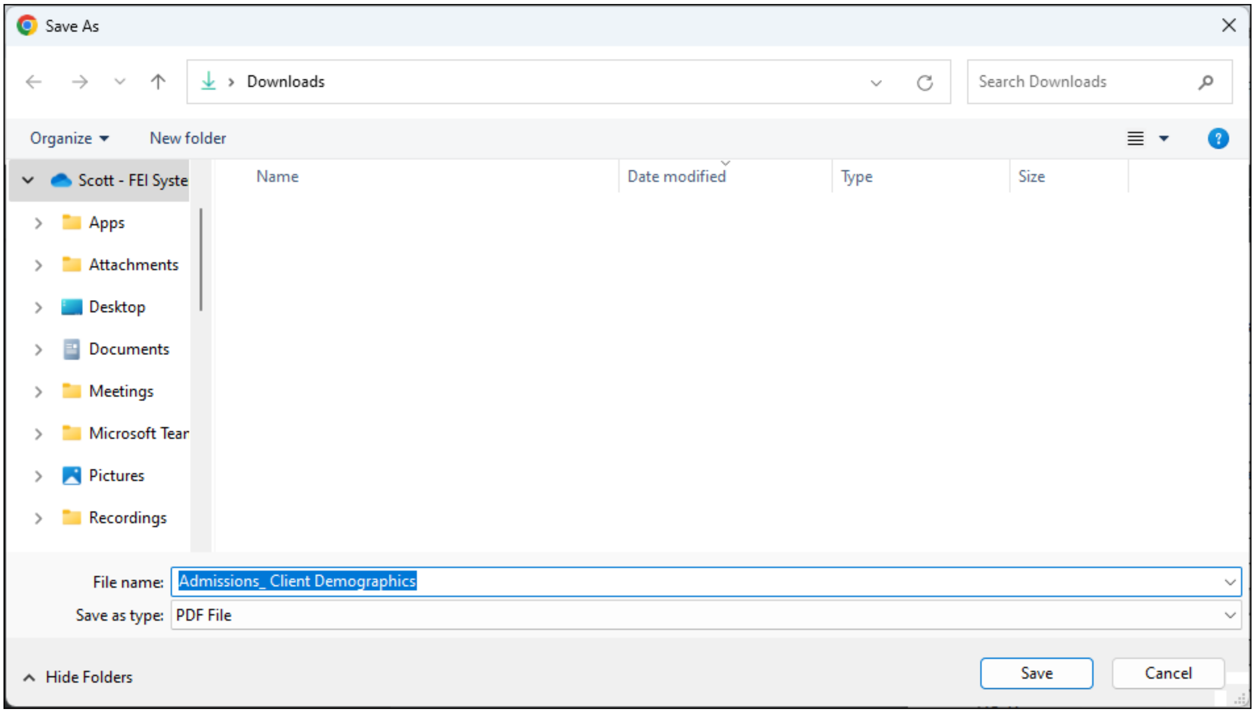



*Figure 200: Report - Save As*

9. Click **Save**.

# Appendix A: Acronyms

*Table 15: Acronyms*

| Acronym | Literal Translation |
|---|---|
| ADMH | Alabama Department of Mental Health |
| AOD | Alcohol or Drugs |
| ASAIS | Alabama Substance Abuse Information System |
| ASAM | American Society of Addiction Medicine |
| CGE | Client Group Enrollment |
| EDI | Electronic Data Interchange |
| EHR | Electronic Health Record |
| GPRA | Government Performance and Results Act |
| MPI | Master Patient Index |
| NOMs | National Outcome Measures |
| SAMHSA | Substance Abuse and Mental Health Services Administration |
| SPARS | Substance Abuse and Mental Health Services Administration's (SAMHSA's) Performance Accountability and Reporting System |
| SUD | Substance Use Disorder |
| TEDS | Treatment Episode Data Set |
| TPL | Third Party Liability |
| TX | Treatment |
| WITS | Web Infrastructure for Treatment Services |

# Appendix B: Glossary

*Table 16: Glossary*

| Term | Definition |
|---|---|
| Agency | The legal entity that a provider operates within; Some people refer to this as 'Provider'. |
| CRAFFT | A screening used for clients under the age of 18. |
| Facility | The location (building) that an Agency/Provider uses to provide services or track Prevention Plans. A provider can have more than one facility. |
| Goals | The broad result that an individual wants to achieve by receiving services. |
| Intervention | The methods, strategies, and services that staff will use to help the client achieve their objectives. |
| Objectives | The specific measurable steps that the client should accomplish to meet their goals. |
| UNCOPE | A screening used for clients over the age of 18. |