

ADMH SAIS

WITS Treatment User Guide

Version 1.0

Prepared by FEI Systems

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Record of Changes

Table 1: Record of Changes

Version Number	Date	Author/Owner	Description of Change
0.1	5/13/2025	Scott Wilson	Initial Draft

1. INTRODUCTION

1.1. Purpose

This document covers the standard functionality of the WITS Treatment module for the state of Alabama's end users. This particular version of the WITS Treatment End User Guide covers workflows for agencies that do not need to complete the ADMH Placement Assessment during the client enrollment process.

This alternate workflow is determined by an attribute that is added to a provider agency. If an agency should have this attribute but does not, contact your WITS administrator for assistance.

Users will know their agency has this attribute because they will not be prompted to complete the ADMH Placement Assessment when trying to add a new outcome measure for the client.

1.2. Audience

The intended audience for this WITS User Guide is users tasked with managing client records in WITS. Users will need the appropriate clinical roles assigned to their WITS user accounts to perform the processes and actions described in this document.

2. GETTING STARTED

2.1. System Requirements

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

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

2.2. Pop-Up Blocker

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

For more information on how to disable the pop-up blocker, 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:

<https://al-uat-sts.witsweb.org>

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

- User account credentials will match that of the user's 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 actions 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.

NOTE: The workflow presented below is for provider agencies that do not need to complete the ADMH Placement Assessment. If your agency must complete the assessment, contact your AITS Administrator and have them provide you with the correct user guide (ADMH Treatment End User Guide).

Differences in this user guide include the following:

- ADMH Placement Assessment is not required. It will not display as a menu option under the Client Activity List.
- On the Outcome Measures screen, all fields will need to be completed for TEDS reporting.
 - Questions regarding tobacco use are optional and do not need to be completed.
- A diagnosis needs to be recorded for the client. This does not display as a required screen, but a primary diagnosis is required before service encounters can be recorded against a client record.

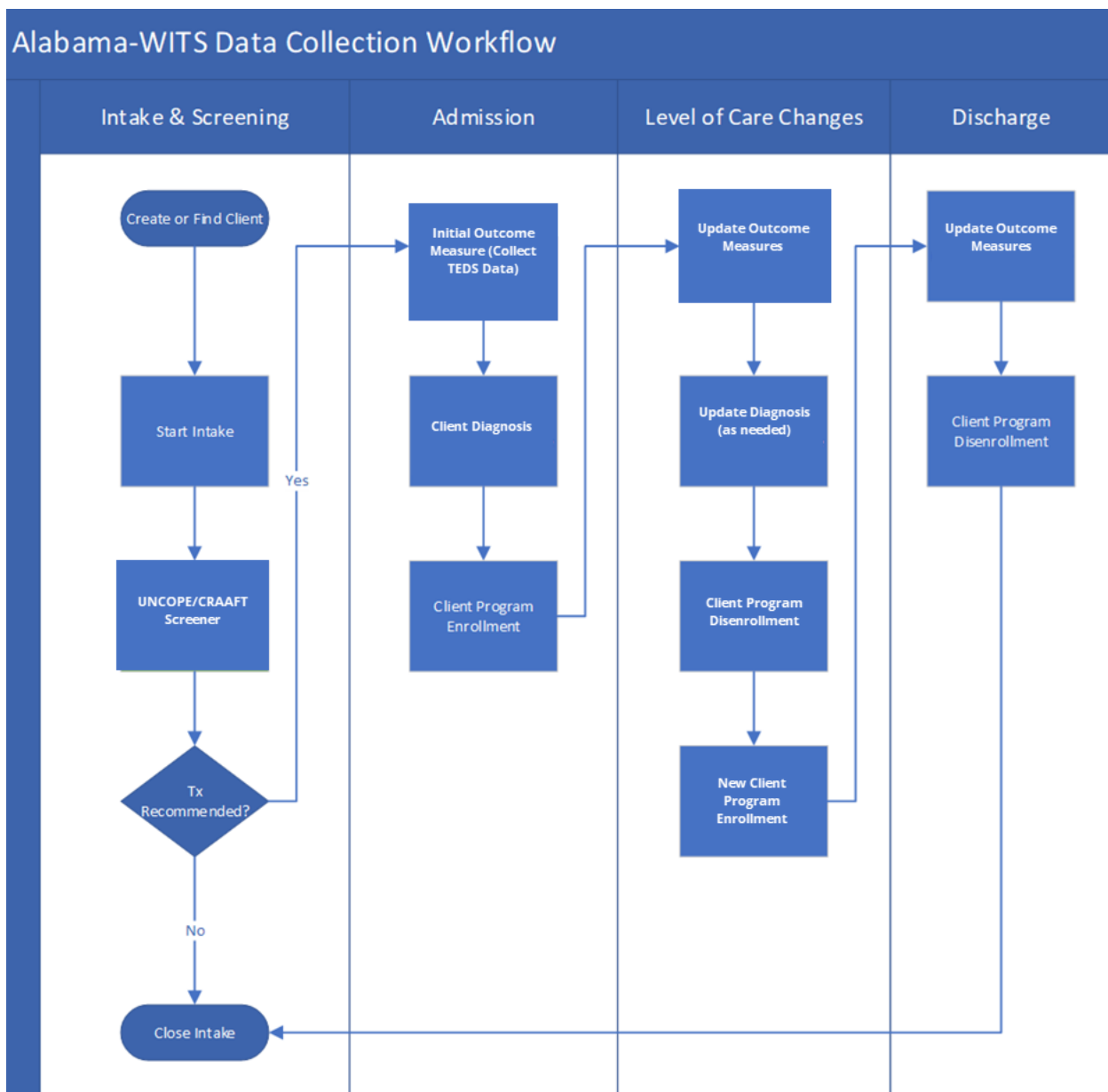


Figure 1: Treatment Workflow

The steps for completing each step of the treatment data collection workflow are covered in detail in the proceeding sections.

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.



First Name	Middle Name
← Required	Optional

Figure 2: Required vs Optional Fields

Some fields will have an alternating yellow and white striped bar to the left. These fields are required for TEDS reporting. While you can save data and leave a screen without completing these fields, records will not show as Complete on the Activity List screen until these fields are completed.



Veteran Status

Figure 3: Required for Completion and/or TEDS Reporting

3.1. Client Records

The first step towards treating a client is the creation and management of their client record.

3.1.1. Client Search

Before creating a client record, the user should always perform a search for an existing client record. This prevents duplicate records from being created for the provider.

To search for a client record:

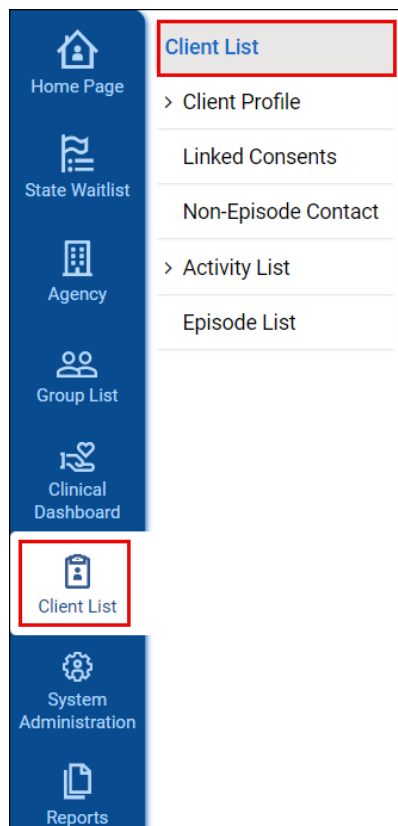
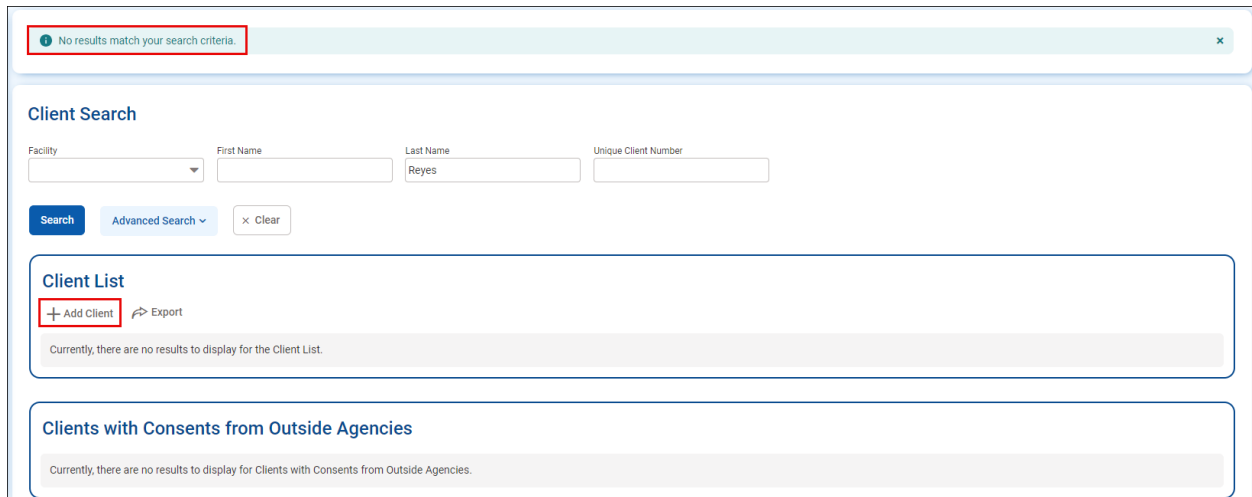


Figure 4: Accessing Client Records

1. From the left navigation menu, click **Client List**.
2. The Client Search screen displays with basic search functionality immediately available.
3. If other criteria besides those under basic search will be used to locate the client record, then click **Advanced Search**.
4. Enter search criteria, and then click **Search**.
5. Search results will be listed under the Client List section.

3.1.2. Add Client

If a search for a client record does not produce results, then the client has not been added to WITS for this agency. A record will need to be created.



The screenshot displays the 'Client Search' interface. At the top, a light blue banner contains the message 'No results match your search criteria.' with a close button (X). Below this, the 'Client Search' section includes a search form with fields for Facility (a dropdown menu), First Name, Last Name (containing 'Reyes'), and Unique Client Number. There are three buttons: 'Search' (dark blue), 'Advanced Search' (light blue with a dropdown arrow), and 'Clear' (light blue with an X). Below the search form is the 'Client List' section, which has a '+ Add Client' button (highlighted with a red box) and an 'Export' button. A message below states 'Currently, there are no results to display for the Client List.' At the bottom is the 'Clients with Consents from Outside Agencies' section, which also displays a message: 'Currently, there are no results to display for Clients with Consents from Outside Agencies.'

Figure 5: Client Search - No Results

1. In the Client List section, click **+Add Client**.
2. The Client Profile screen will display.
3. At the least, complete the required fields.

Client Profile

^ Hide Context Information

Unique Client Number

State Client ID

Created By

Created Date

Updated By

Updated Date

First Name

Jaime

Middle Name

Last Name

Reyes

Mother's Maiden Name

Suffix

Sex at Birth

Male

Gender Identity

DOB

2/1/2006

SSN

200112000

Provider Client ID

Driver's License

Has paper file

☒ Yes ☐ No

Upload Profile Image

No File Selected...

Browse

Upload

< Back

Next >

Save

Save and Finish

× Cancel

Alternate Names

+ Add

Currently, there are no results to display for Alternate Names.

Addresses

+ Add

Currently, there are no results to display for Addresses.

Figure 6: Client Profile

4. Scroll down the screen and then click **+Add** under the Addresses section.

Address Information

Address Type

Confidential ☐ Yes ☒ No

Address Line 1

Address Line 2

County

City State Zip

Save and Finish

Figure 7: Address Information

5. Complete the required fields, and then click **Save and Finish**.
6. The address information entered will be validated against the US Postal Services database. If no match is found, an informational message will display informing the user of a possible error.
 - a. To edit the address information, click **Edit**.
 - b. To accept the address information as is, click **Select**.

ⓘ We attempted to validate your address with the United States Postal Service database, but no match was found. You may maintain your address by clicking on the "Select Entered Address" link or go back and change it by clicking on the "Edit Entered Address" link. x

Address Validation

We attempted to validate your address with the United States Postal Service database, but no match was found.

You may maintain your address (Select) or go back and change it (Edit).

Address	Actions
Original Address: 123 Liberty Ln, Birmingham, Alabama 35005	Select Edit

Figure 8: Address Validation Error

7. Once the address is verified or no errors are found, the Contact Info screen displays.
8. Capture at least one Method of Contact for the client and choose the Preferred Method of Contact.

Contact Info

Preferred Method of Contact

Home Phone # Work Phone # Mobile #

Other Phone # Fax #

Email Address

Addresses

+ Add Address

Address Type	Address	Confidential	Created	Updated
Client Home	820 10TH AVE, BIRMINGHAM, AL 35228	No		

[< Back](#)
[Next >](#)
[Save](#)
[Save and Finish](#)
[x Cancel](#)

Figure 9: Contact Info

9. Click **Save and Finish**.

Once these steps are completed, the user needs to complete the required fields on the [Additional Information](#) screen to satisfy requirements for the [Client Intake](#) and TEDS reporting.

3.1.3. Updating a Client Profile

- Should a client record need to be updated, search for the client record.
- To the right of the client in question, click the **vertical ellipsis**.

Client Search

Facility First Name Last Name Unique Client Number

Reyes

[Search](#) [Advanced Search](#) [x Clear](#)

Client List

+ Add Client Export

Full Name	Unique Client #	SSN
JR REYES, Jaime 2/1/2006 Male	Q654044IV464644	200-11-

[Profile](#)
[Activity List](#)
[Linked Consents](#)

Figure 10: Accessing Client Profile

3. Click **Profile**.

- Once within a client's profile, several submenu actions become available under Client List > Client Profile.

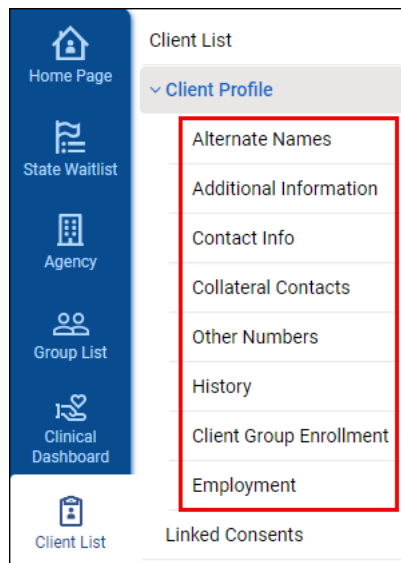


Figure 11: Client Profile Submenu Actions

Each section is covered below.

3.1.3.1. Alternate Names

If the client has alternate or preferred names that differ from their legal name, they can be captured here. The client search will take these names into consideration when performing a search.

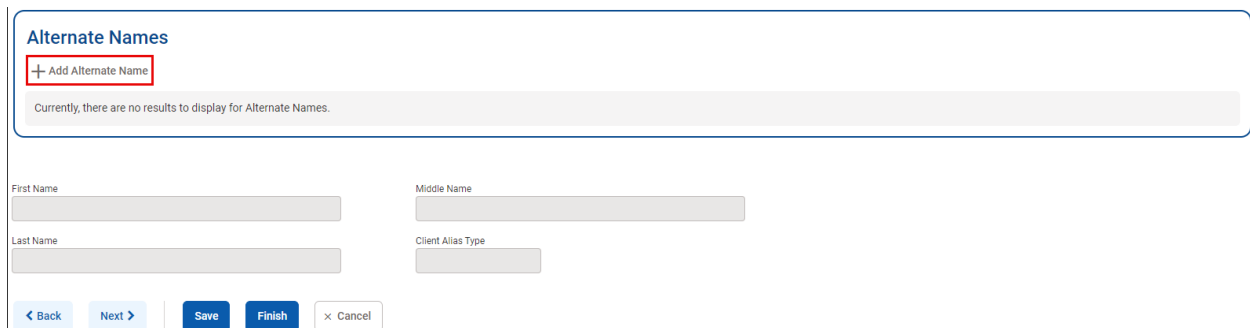


Figure 12: Alternate Names

- Click **+Add Alternate Name**.
- Complete the required and relevant fields.

Alternate Names

+ Add Alternate Name

Currently, there are no results to display for Alternate Names.

First Name

Middle Name

Last Name

Client Alias Type

Save and Finish

× Cancel

Figure 13: Add Alternate Name

3. Click **Save and Finish**.

3.1.3.2. Additional Information

Clicking **Additional Information** under the Client Profile submenu to access client demographic information. Complete the required and relevant fields, and then **Save and Finish**.

Additional Information

Ethnicity

Races

Black/African American
White
Alaskan Native
American Indian
Asian

Special Needs

None
No Response
Developmentally Disabled
Major Difficulty in Ambulating or Nonambulation
Moderate To Severe Medical Problems

Veteran Status

Sexual Orientation

English Fluency

Hearing Status

General Client Comments

Selected Races

Selected Special Needs

Citizenship

Religious Preference

Language Preference

Interpreter Needed

◀ Back

Next ▶

Save

Save and Finish

× Cancel

Figure 14: Additional Information

3.1.3.3. Contact Info

To add phone and address information to the client's record, click **Contact Info** from the Client Profile submenu.

Contact Info

Preferred Method of Contact
Phone

Home Phone #

Work Phone #

Mobile #

Other Phone #

Fax #

Email Address

Addresses

+ Add Address

Address Type	Address	Confidential	Created	Updated	
Client Home	820 10TH AVE, BIRMINGHAM, AL 35228	No	1/8/2024	1/8/2024	

< Back
Next >
Save
Save and Finish
x Cancel

Figure 15: Adding to Contact Info

3.1.3.4. Collateral Contacts

To add contacts to a client's record:

1. While the client's record is active, click **Collateral Contacts** under the Client Profile submenu.
2. The Collateral Contacts screen displays. Fields that are gray cannot be edited.

Collateral Contacts

[+ Add Contact](#)

Currently, there are no results to display for Collateral Contacts.

First Name	Address 1		
Last Name	Address 2		
Relation	City	State	Zip
Custodian	Email		
Gender	Can Contact		
Date of Birth	Consent On File		
SSN	Expiration Date of Consent		
Home Phone	Notes		
Work Phone			
Mobile			
Fax			
Other	Created		
Legal Guardian	Last Update		
Gives Permission To Treat?			
Permission To Treat Type			
Active Date			
Inactive Date			

[< Back](#)
[Next >](#)
[Save](#)
[Finish](#)
[× Cancel](#)

Figure 16: Collateral Contact

3. Click **+Add Contact** to make the fields active.
4. Complete required and relevant fields.

Collateral Contacts

[+ Add Contact](#)

Currently, there are no results to display for Collateral Contacts.

First Name Last Name Relation Custodian ☐ Yes ☐ No Gender Date of Birth SSN Home Phone Work Phone Mobile Fax Other Legal Guardian ☐ Yes ☐ No Gives Permission To Treat? ☐ Yes ☐ No Permission To Treat Type Active Date Inactive Date	Address 1 Address 2 City State Zip Email Can Contact ☐ Yes ☐ No Consent On File ☐ Yes ☒ No Expiration Date of Consent Notes Created Last Update
--	---

Save and Finish
× Cancel

Figure 17: Add Collateral Contact

5. Click **Save and Finish**.

If needed, more than one contact can be added. Repeat steps as needed for each contact.

3.1.3.5. Other Numbers

This screen is used to capture other numbers related to state and court documents not captured in the client's profile.

1. While the client's record is active, click **Other Numbers** under the Client Profile submenu.
2. The Other Numbers screen displays. Fields will be gray and cannot be edited.
 - a. Existing numbers will be listed under the Other Numbers List section.

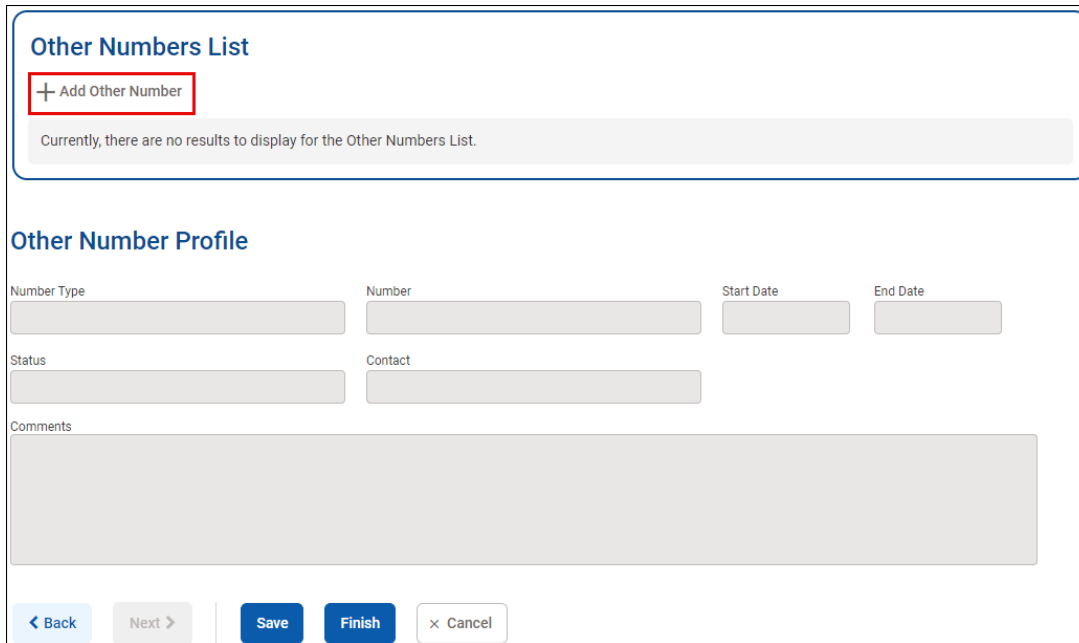


Figure 18: Other Numbers

3. Click **+Add Other Number**. The Other Number Profile section will become editable.
4. The types of information that can be recorded here may include:
 - a. ASAIS ID
 - b. External Record ID – This is created for clients created imported into WITS.
 - c. Court case numbers
 - d. State issued IDs
5. Complete the required and relevant fields.

Other Numbers List

+ Add Other Number

Currently, there are no results to display for the Other Numbers List.

Other Number Profile

Number Type

Number

Start Date

1/8/2024

End Date

Status

Active

Contact

Comments

Save and Finish

× Cancel

Figure 19: Adding Additional Number

6. Click **Save and Finish**.

These steps can be repeated as needed to capture additional numbers.

3.1.3.6. History

History tracks the changes made to the client's record across all screens under the Client Profile.

If needed, the history can be exported to an Excel file.

Client History

Export

Date Changed	System Account	Description of Changes
1/8/2024 11:53 AM	Wilson, Scott	• Client Contacts 'Reyes, Bianca' added.
1/8/2024 10:08 AM	Wilson, Scott	• Accessed Client Profile Screen
1/8/2024 10:08 AM	Wilson, Scott	• Accessed Client Record: 'Reyes, Jaime, Client ID: Q654044IV464644'
1/8/2024 10:08 AM	Wilson, Scott	• Client 'Reyes, Jaime' added.

Figure 20: Client Profile History

3.1.3.7. Client Group Enrollment

Client Group Enrollment (CGE) contains information regarding a client's benefits.

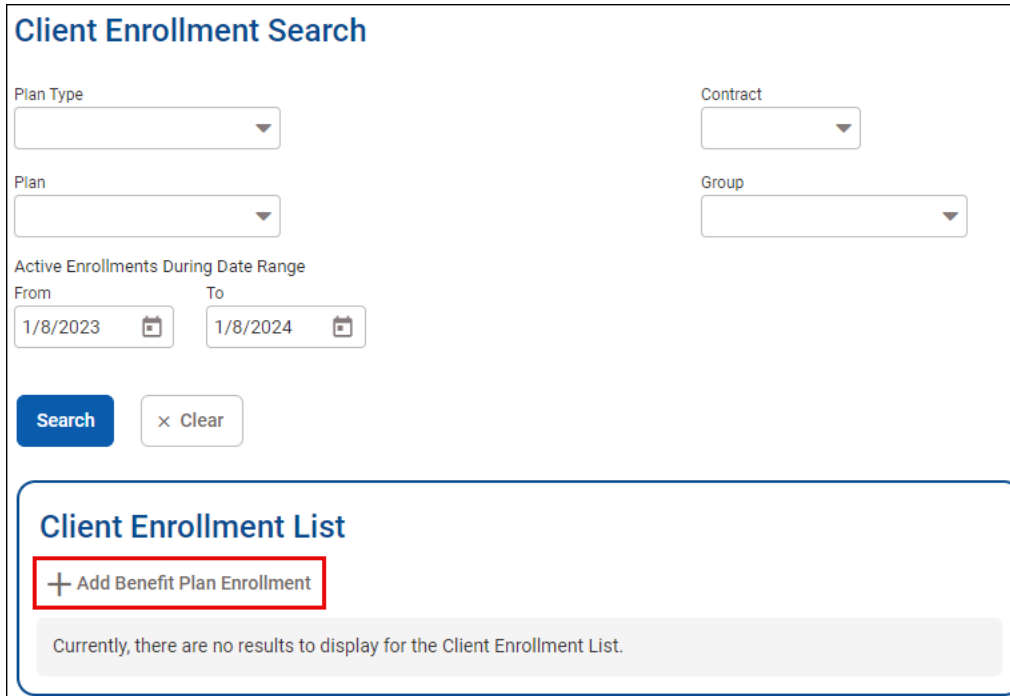
Only Third Party Liability (TPL) information will need to be manually added to a client's record.

Medicaid eligibility will be auto-generated. A 270 is submitted to Medicaid when a client record is created. Medicaid then returns a 271 response on the client's Medicaid eligibility, which is then used to update the CGE.

Any government contracts between the provider and Alabama Department of Mental Health (ADMH) will be added to the CGE automatically after the client intake is created.

Existing enrollments will display under the Client Enrollment List. If needed, the Client Enrollment Search section can be used to filter the results in the Client Enrollment List.

To add a benefit or insurance:



Client Enrollment Search

Plan Type

Contract

Plan

Group

Active Enrollments During Date Range

From To

Search

Client Enrollment List

Currently, there are no results to display for the Client Enrollment List.

Figure 21: Client Group Enrollment

1. Click **+Add Benefit Enrollment Plan**.
2. The Benefit Plan/Private Pay Billing Information will display below the Client Enrollment List section.
3. Complete all required and relevant fields.

Benefit Plan/Private Pay Billing Information

Payor-Type 	Plan-Group
Payor Priority Order 1	Policy #
Coverage Start 	Payment Scale
End 	Relationship to Subscriber/Responsible Party
Eligibility Category 	

Subscriber/Responsible Party

First Name 	Middle Name 	Last Name
Birthdate 	Gender 	Subscriber #
Address 1 		
Address 2 		
City 	State 	
Zip 		

Figure 22: Benefit Plan/Private Pay Billing Information

4. Click **Save**.

These steps can be repeated as necessary to capture additional benefit plans.

3.1.3.8. Employment

This section can be used to capture the client's employment history.

To add employment history:

Employment History

+ Add New Employment

Currently, there are no results to display for Employment History.

Figure 23: Add Employment

1. Click **+Add New Employment**.
2. The Employment Profile screen will display.
3. Complete all required and relevant fields.

Employment Profile

Employment Start Date

Employment End Date

Employment Status

Position

Termination Reason

Name of Employer

Wage

Wage Type

Employment Type

Hours Type

Assisted By

Average Hours Per Week

Level Of Responsibility

Number of Work Days/Week

Town

Notes

Save

Save and Finish

× Cancel

Figure 24: Employment Profile

4. Click **Save and Finish**.

To edit an existing employment record:

1. To the right of the employment record, click the **vertical ellipsis**.

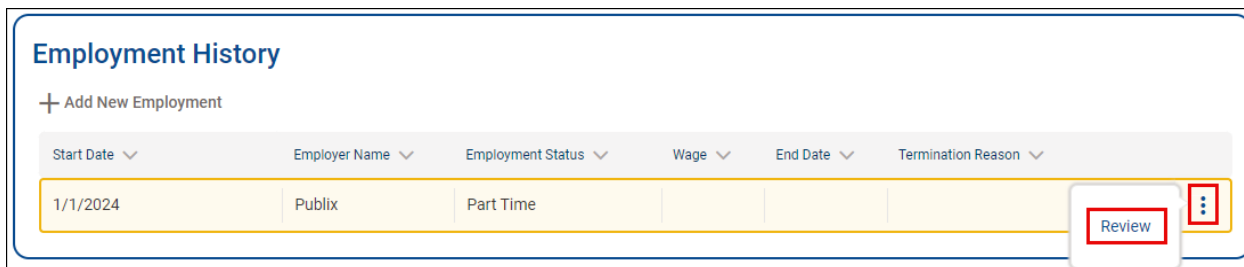


Figure 25: Edit Employment History

2. Click **Review**.
3. Make necessary edits, and then click **Save and Finish**.

3.2. Client Intake

Once the client's profile has been created, the intake process can begin.

NOTE: The active client record is indicated by the ribbon at the top of WITS.

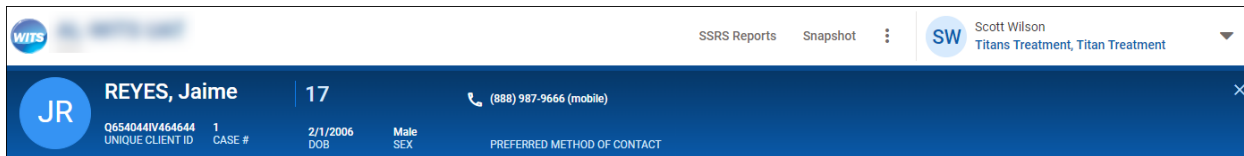


Figure 26: Active Client Record

1. From the Client List, click submenu item **Activity List**.
2. The Episode List screen displays.
 - a. Any previously recorded episodes will display here.

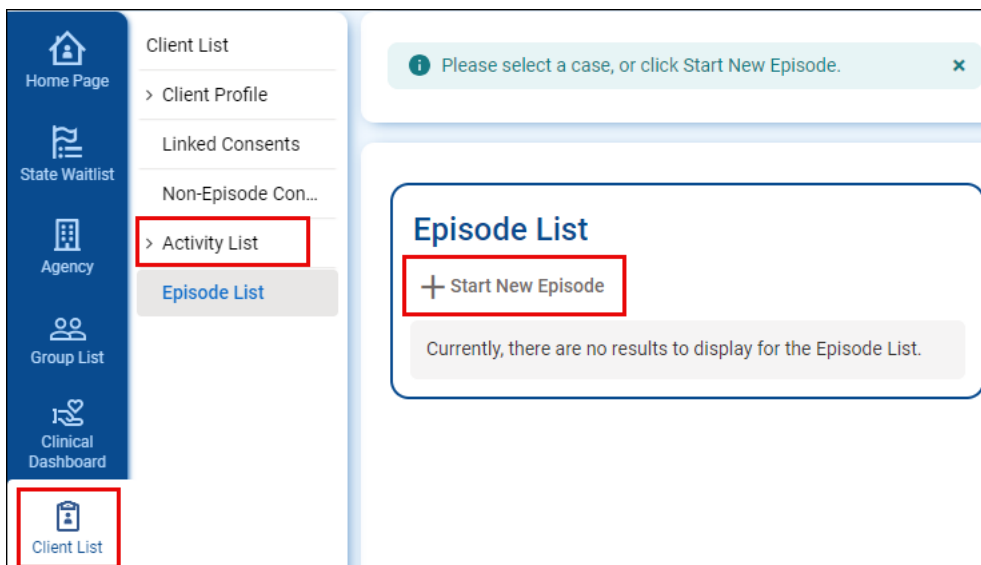


Figure 27: Create Intake

3. To begin the intake, click **+Start New Episode**.
4. The Intake Case Information screen displays.
5. Complete all required and relevant fields.
 - a. While not a required field, Presenting Problems needs to be completed.

Intake Case Information

^ Hide Context Information

Case #
1

Created By	Created Date	Updated By	Updated Date

Intake Facility
Titan Treatment

Intake Staff
Wilson, Scott

Case Status
Open Active

Initial Contact

Initial Contact Date
1/8/2024

Intake Date
1/8/2024

Pregnant
Not Applicable

Due Date

Prenatal Treatment
☐ Yes ☒ No

County

Primary Referral Source

Secondary Source of Referral

Referral Contact

[Add Collateral Contact](#)

HIV Positive

Injection Drug User

Problem Area

What is the most important thing you want that made you contact us?

Presenting Problems
Abuse Victim
Alcohol
Assault Victim
Criminal Justice
Daily Coping

Presenting Problems Selected

Other Presenting Problem Description

Special Initiative
Acquired Brain Disorders
Adult with Severe Emotional Disturbance
Adult with Organic Disorder w/o SED
Adult with Severe and Persistent Mental Illness
Child/Youth with Severe Emotional Disturbance

Special Initiative Selected

Inter-Agency Service
Child Protective Services (OCS)
Court/Legal Interface
DCSF
Developmental Disabilities
Domestic Violence

Inter-Agency Service Selected

Domains

Selected Domains
Treatment

Date Closed

Save

Save and Finish

× Cancel

Figure 28: Intake Case Information

6. Click **Save and Finish**.
7. The Client Activity List screen displays. As specific actions are completed against a client record, they will display here.
 - a. The client profile information will have a status of In Progress until all required information has been collected.

Client Activity List				
Activity ▾	Activity Date ▾	Created Date ▾	Status ▾	
Client Information (Profile)	1/8/2024	1/8/2024	In Progress (Details)	⋮
Intake Transaction	1/8/2024	1/8/2024	Completed	⋮

Figure 29: Activity List

8. Click **Details** to the right of In Progress.

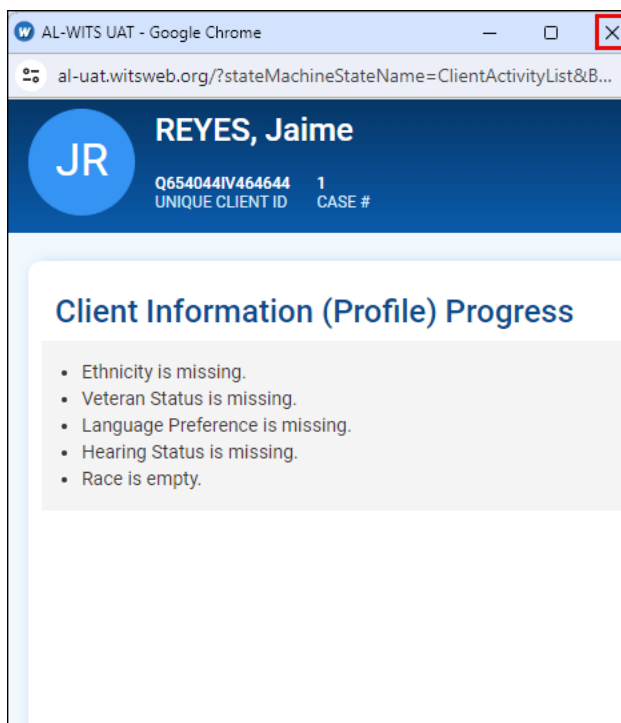


Figure 30: Client Information Profile Progress

9. The Client Information Profile Progress window will pop up, informing the user of the information that still needs to be captured.
 - a. The missing information will likely be from the [Additional Information](#) screen under the Client Profile.
 - b. Click the **X** in the top right corner of the window to close.
10. Navigate to [Additional Information](#) and complete the required and relevant fields.

3.3. Screening

To perform a screening, the user will need to navigate to Screening and then choose the appropriate screening form.

NOTE: To begin the Intake process, the user must have the client record active. The active record is indicated by the ribbon at the top of WITS.

1. From the Client List, click submenu item **Activity List** and then click **Screening**.
2. The available screenings will be listed under Screening.
3. Click the appropriate form to access it.

3.3.1. UNCOPE

Once this form is selected, the user can search for existing UNCOPE screenings for the client, or they can create a new one.

NOTE: UNCOPE is for clients that are over the age of 18.

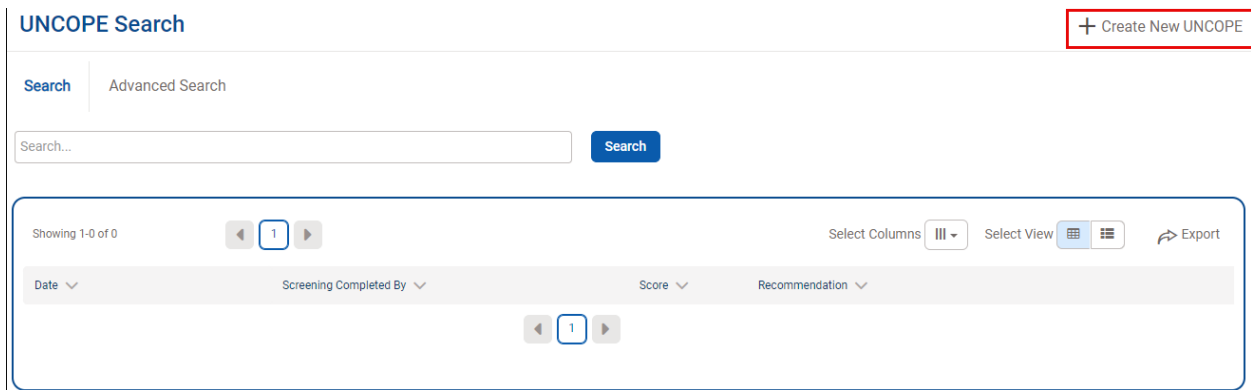


Figure 31: Create UNCOPE

1. Click **+Create New UNCOPE**.
2. The Add UNCOPE window will open.

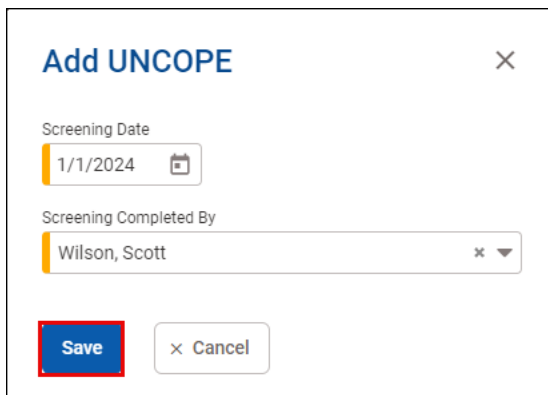


Figure 32: Add UNCOPE

3. Complete the fields and then click **Save**.
 - a. If the client is under the age of 18, a confirmation will open confirming the creation of the form.

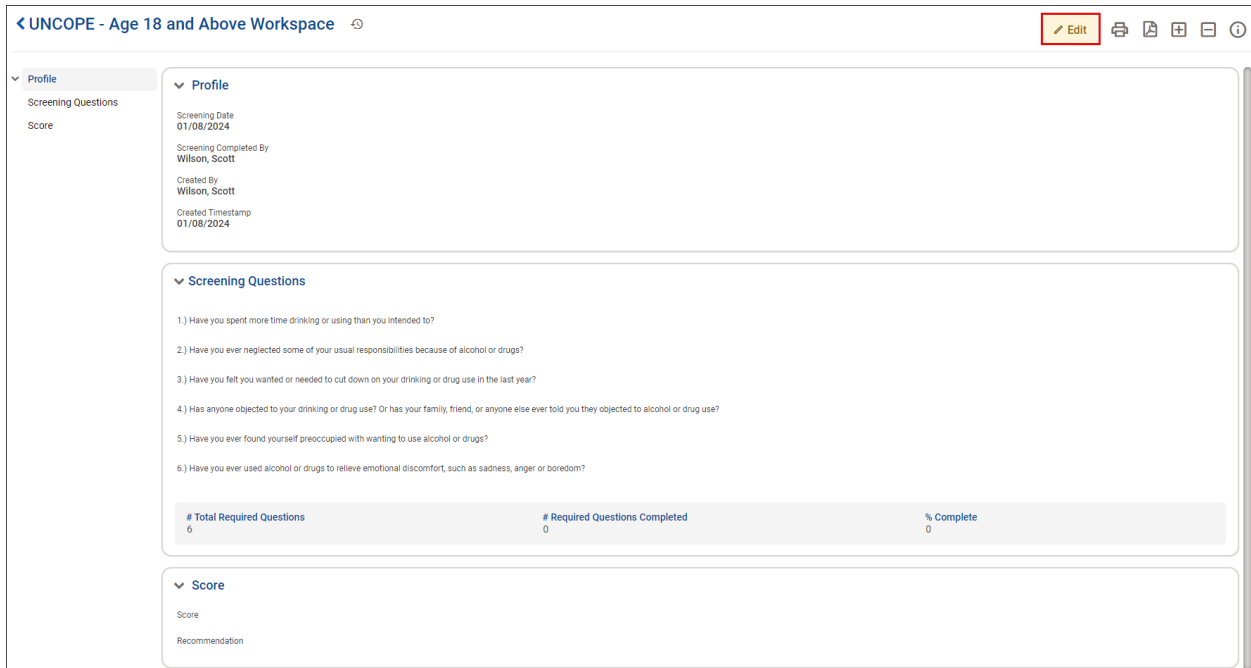
Confirmation

Client is under 18 years of age. Do you still want to create a UNCOPE ?

Ok
× Cancel

Figure 33: Age Restriction Confirmation

4. The UNCOPE Workspace screen displays. To edit the fields, click **Edit**.



UNCOPE - Age 18 and Above Workspace

Profile

Screening Date
01/08/2024

Screening Completed By
Wilson, Scott

Created By
Wilson, Scott

Created Timestamp
01/08/2024

Screening Questions

- 1.) Have you spent more time drinking or using than you intended to?
- 2.) Have you ever neglected some of your usual responsibilities because of alcohol or drugs?
- 3.) Have you felt you wanted or needed to cut down on your drinking or drug use in the last year?
- 4.) Has anyone objected to your drinking or drug use? Or has your family, friend, or anyone else ever told you they objected to alcohol or drug use?
- 5.) Have you ever found yourself preoccupied with wanting to use alcohol or drugs?
- 6.) Have you ever used alcohol or drugs to relieve emotional discomfort, such as sadness, anger or boredom?

# Total Required Questions	# Required Questions Completed	% Complete
6	0	0

Score

Score

Recommendation

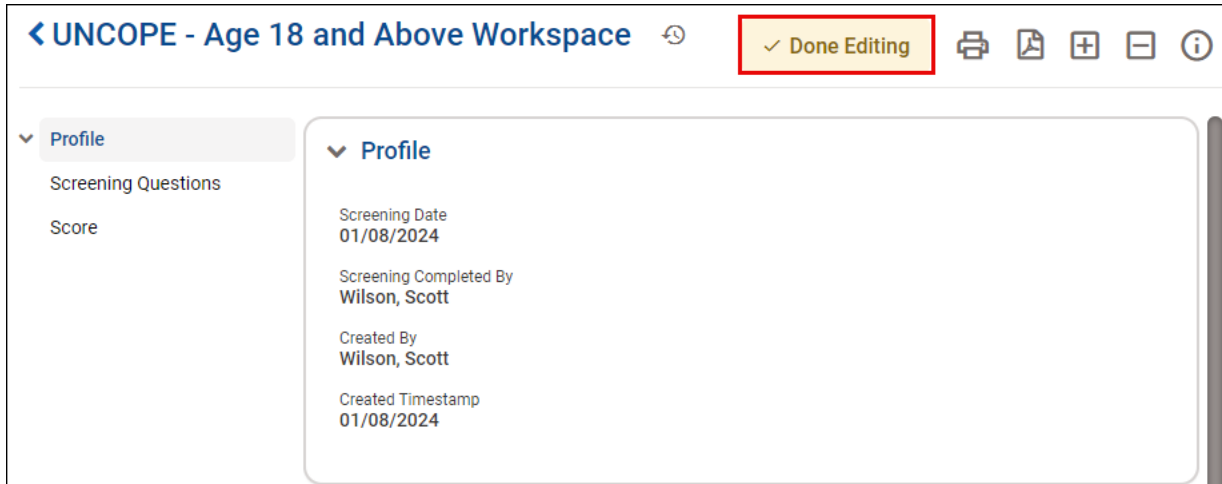
Figure 34: UNCOPE Workspace

5. The Screening Questions section will become editable.
6. Complete all questions.

- As questions are completed, the Score section will update and provide a recommendation based on answers to the questions.

▼ Score	
Score	5
Recommendation	Probability of a significant problem involving substances and the need for further assessment

8. Once the form has been completed, click **Done Editing**.



UNCOPE - Age 18 and Above Workspace

✓ Done Editing

Profile

Screening Questions

Score

Profile

Screening Date
01/08/2024

Screening Completed By
Wilson, Scott

Created By
Wilson, Scott

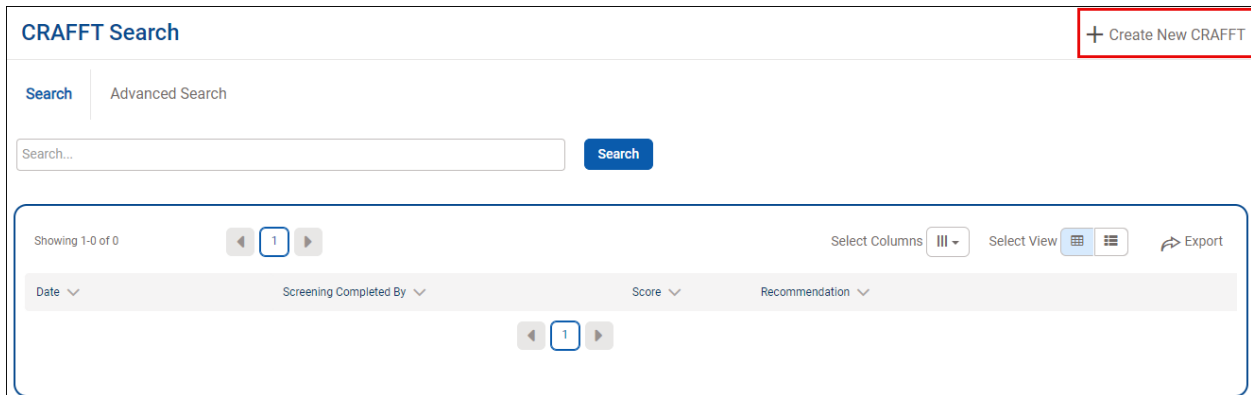
Created Timestamp
01/08/2024

Figure 37: UNCOPE Done Editing

3.3.2. CRAFFT

Once this form is selected, the user can search for existing CRAFFT screenings for the client, or they can create a new one.

NOTE: CRAFFT is for clients that are under the age of 18.



CRAFFT Search

+ Create New CRAFFT

Search | Advanced Search

Search...

Search

Showing 1-0 of 0

Select Columns

Select View

Export

Date

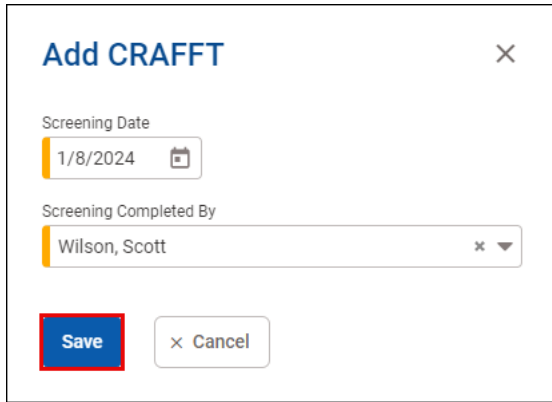
Screening Completed By

Score

Recommendation

Figure 38: Create CRAFFT

1. Click **+Create New CRAFFT**.
2. The Add CRAFFT window will open.



Add CRAFFT ✕

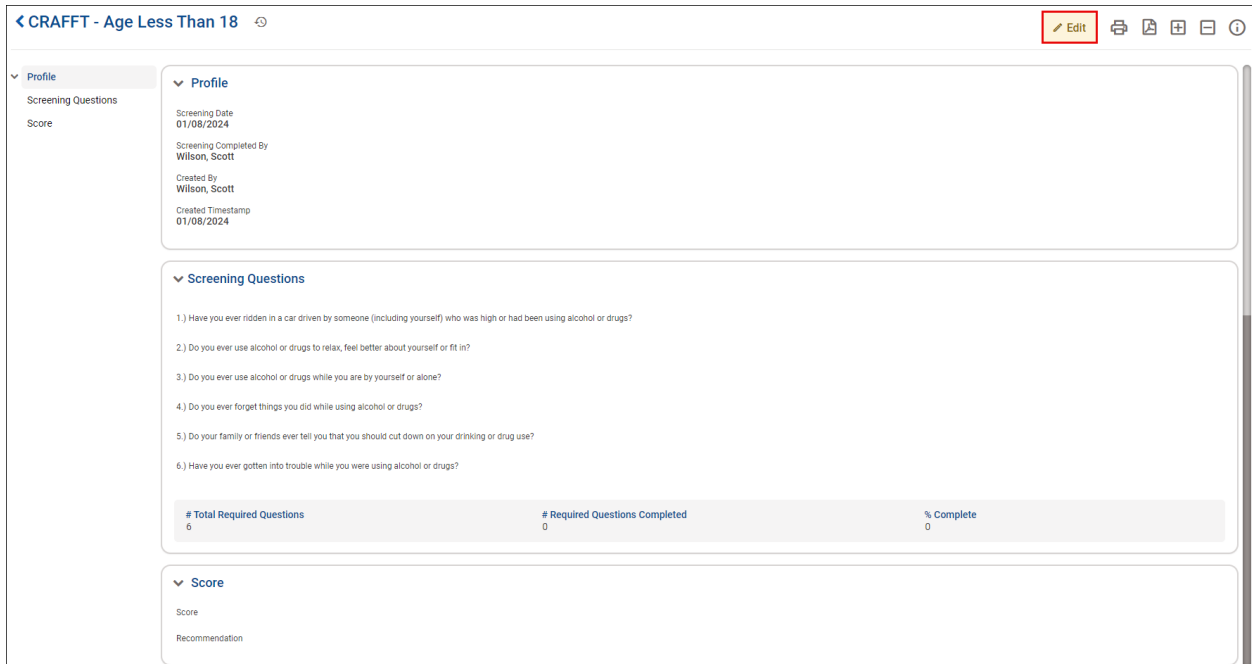
Screening Date
1/8/2024 📅

Screening Completed By
Wilson, Scott ✕ ▼

Save ✕ Cancel

Figure 39: Add CRAFFT

3. Complete the fields and then click **Save**.
 - a. The user is notified if the client is over the age of 18, a confirmation will open confirming the creation of the form.



CRAFFT - Age Less Than 18 🔍 Edit 🖨️ 📄 ⊕ 🗑️ ⓘ

▼ Profile

Screening Questions

Score

Screening Date
01/08/2024

Screening Completed By
Wilson, Scott

Created By
Wilson, Scott

Created Timestamp
01/08/2024

▼ Screening Questions

1.) Have you ever ridden in a car driven by someone (including yourself) who was high or had been using alcohol or drugs?

2.) Do you ever use alcohol or drugs to relax, feel better about yourself or fit in?

3.) Do you ever use alcohol or drugs while you are by yourself or alone?

4.) Do you ever forget things you did while using alcohol or drugs?

5.) Do your family or friends ever tell you that you should cut down on your drinking or drug use?

6.) Have you ever gotten into trouble while you were using alcohol or drugs?

# Total Required Questions	# Required Questions Completed	% Complete
6	0	0

▼ Score

Score

Recommendation

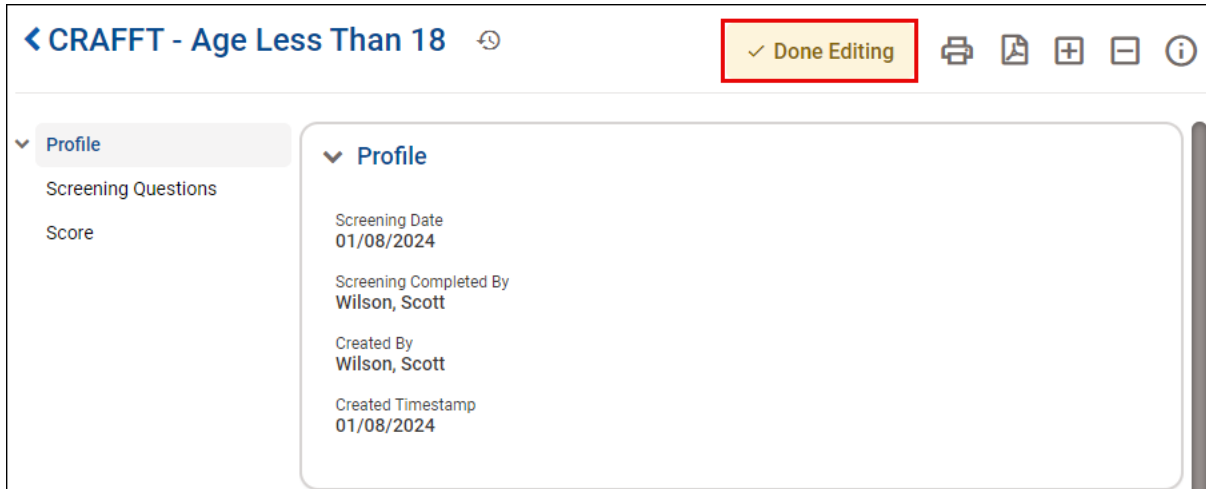
Figure 40: CRAFFT Workspace

4. The CRAFFT Workspace screen displays. To edit the fields, click **Edit**.
5. The Screening Questions section will become editable.
6. Complete all questions.

- As questions are completed, the Score section will update and provide a recommendation based on answers to the questions.

▼ Score	
Score	3
Recommendation	Probability of a significant problem involving substances and the need for further assessment

8. Once the form has been completed, click **Done Editing**.



< CRAFFT - Age Less Than 18 

✓ Done Editing     

Profile

Screening Questions

Score

Profile

Screening Date
01/08/2024

Screening Completed By
Wilson, Scott

Created By
Wilson, Scott

Created Timestamp
01/08/2024

Figure 43: CRAFFT Done Editing

3.4. Admission

After the screening is completed, the user will need to admit the client into a program. This is a multi-step process, which must be completed in the order presented to prevent errors.

complete the ADMH Placement Assessment.

3.4.1. Initial Outcome Measures

The first step in the admission process is to create outcome measures regarding the client's treatment.

1. From within the **Activity List** submenu, click **Outcome Measures**.

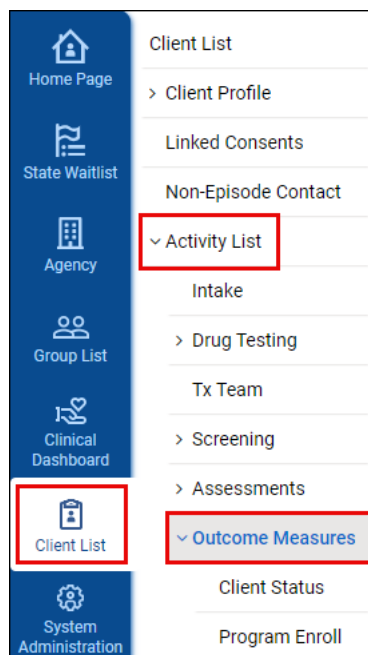


Figure 44: Outcome Measures Navigation

2. The Outcome Measures List screen displays.
 - a. Outcome Measures added to the client's record will be listed here.

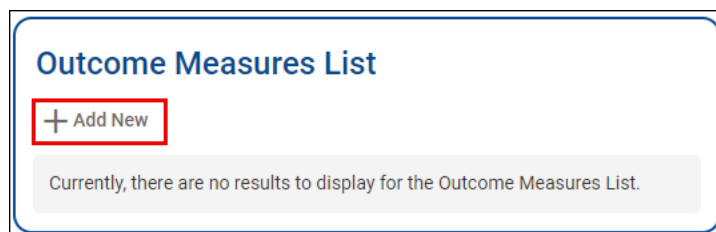


Figure 45: Add Outcome Measure

3. Click **+Add New** to create a new measure.
4. The Outcome Measures – Client Status screen displays.
5. Some fields will prepopulate based on information provided in the ADMH Placement Assessment.
6. Complete all fields. The fields on Tobacco use are optional.
 - a. Table 2: Outcome Measures listed below Figure 65 provides an explanation of each field.

Outcome Measures - Client Status

Date Type

Pregnant Due Date

Domains Selected Domains

Profile

Codependent/Collateral ☐ Yes ☐ No Co-Occurring SA and MH Problem # of Prior SA Tx Episodes

Medication Assisted Tx SM/SED Status

of times the client has attended a self-help program in the 30 days preceding the date of reference (admission or discharge) to treatment services. Includes attendance at AA, NA, and other self-help/mutual support groups focused on recovery from substance abuse and dependence.

Education

Education Status

Financial/Household

Employment Status Source of Income

Primary Payment Source Source of Income (Other)

Marital Status What would you estimate your family's annual income to be

If married, how long? Health Insurance

Total Number of Marriages Living Situation

Legal

of Arrests in Past 30 Days Mental Health Legal Status

Legal History Selected Legal History

Substance Use

Rank	Substance	Severity	Frequency	Method	Detailed Drug Code
Primary:					
Secondary:					
Tertiary:					

At what age did the client FIRST use the substances indicated above (if unknown, enter '97')

Primary Secondary Tertiary

of DAYS since LAST use of the substances indicated above:

Primary Secondary Tertiary

Tobacco/Nicotine

Have you ever used Tobacco/Nicotine products?

Smoker Status?

Age of First Use

In the past 30 days, what tobacco/nicotine product did you use most frequently?

Other (Please Describe)

In the past 30 days, how often did you use tobacco/nicotine product(s)?

Figure 46: Outcome Measures - Client Status

Table 2: Outcome Measures

Field	Description
Date	This field will auto populate to the current date.
Type	This field auto populates. - Initial – This type is set for the first outcome measure recorded. - Update – Any outcome measure recorded after the first will have this type.
Pregnant	If the client is pregnant, record it here.
Due Date	Enter the client's expected due date.
Domains	The domain(s) assigned to the client record. This will be Substance Use and it will auto populate.
Codependent/Collateral	Set to Yes if the client is seeking treatment for substance use.
Co-Occurring SA and MH Problem	Choose one of the following: - No – The client does not have a mental health problem along with a substance abuse problem. - Yes – The client has a mental health problem along with a substance abuse problem. - Unknown – It is not known if the client has a mental health problem.
# of Prior SA TX Episodes	If the client has received substance abuse treatment services in the past, record the number of time treatment was sought.
Medication Assisted TX	Is the client receiving medication to assist with SA treatment, record it here.
SMI/SED Status	If the client has a serious mental illness, serious emotional disturbance, or both, record it here.
# of times the client has attended a self-help program in the 30 days preceding the date of reference (admission or discharge) to treatment services. Includes attendance at AA, NA, and other self-help/mutual support groups focused on recovery from substance abuse and dependence.	Enter the number of times the client attended a self-help program in the last 30 days leading up to admission or discharge of treatment services.
Education Status	Highest level of education the client has received.
Employment Status	The client's current employment status.
Source of Income	The client's main source of income.
Source of Income (Other)	If Other was selected as the Source of Income, Type in the source.
What would you estimate your family's annual income to be	Enter the client's estimated annual income for their family.
Primary Payment Source	The primary source of payment for services rendered.
Marital Status	Indicated the client's current marital status.
If married, how long?	This only needs to be completed if the client is currently married. Enter how long the client has been married. This is a text field, so years and months can be recorded.
Total Number of Marriages	Indicate how many times the client has been married.

Health Insurance	Indicate if the client has health insurance, and if so, what type.
Living Situation	Indicate where the client currently lives.
# of Arrests in Past 30 Days	Record how many times the client has been arrested in the past 30 days.
Mental Health Legal Status	Not Used
Legal History	Legal history options will display in the left box. Any options that are applicable to the client should be moved to the Selected Legal History box.
Substance Use – Primary/Secondary/Tertiary	• Primary – This is the primary substance use issue for the client. • Secondary – If the client has a secondary substance use problem record it here. Otherwise, leave blank. • Tertiary – If the client has a third substance use problem record it here. Otherwise, leave blank. For each substance identified, complete the severity, frequency, and method fields.
Severity	Indicate how severe the problem is.
Frequency	Indicate how often the client uses the substance.
Method	Indicate how the client receives the drug into their system.
At what age did the client FIRST use the substances indicated above (if unknown, enter '97')	Enter the age when the client first started using the substance. If unknown, enter 97. Secondary and tertiary do not need to be completed unless a client indicates additional substance use beyond the primary.
# of Days since Last use of the substances indicated above	Enter how many days it has been since the client's last use for each substance identified.
Have you ever used Tobacco/Nicotine products?	Record if the client has ever used tobacco or nicotine products.
Smoker Status	Does the client currently smoke or not.
Age of First Use	How old was the client when they first used tobacco or nicotine products.
In the past 30 days, what tobacco/nicotine product did you use most frequently?	Indicate the tobacco/nicotine product the client uses most.
Other (Please Describe)	If Other is selected for the previous field, use this field to explain why other was chosen.
In the past 30 days, how often did you use tobacco/nicotine product(s)?	Indicated how often in the last 30 days the client has used tobacco/nicotine products.

7. Click **Save and Finish**.

3.4.2. Record Diagnosis

While this is not identified as a requirement in WITS, each client must have a principal diagnosis associated with their record to enter encounter services.

1. From the Client List, click **Diagnosis List** under the **Activity List** submenu.

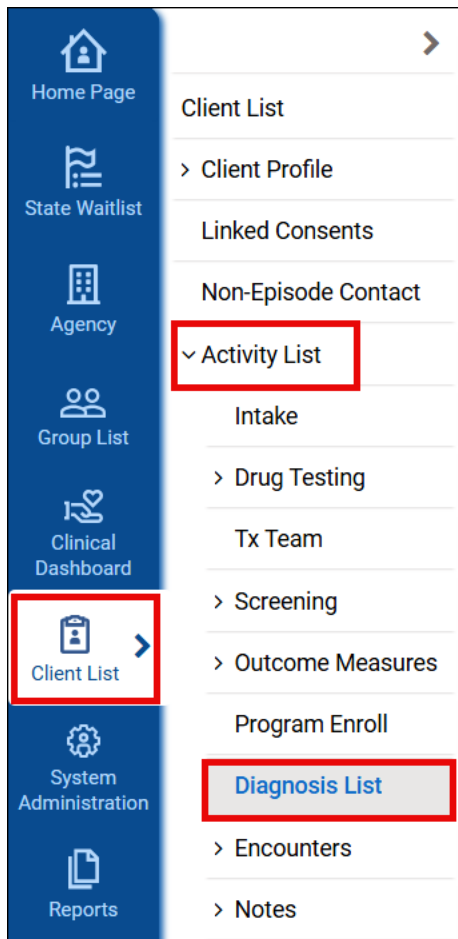


Figure 47: Accessing Diagnosis List

2. On the Diagnosis Search screen, click **+Create New Diagnosis**.

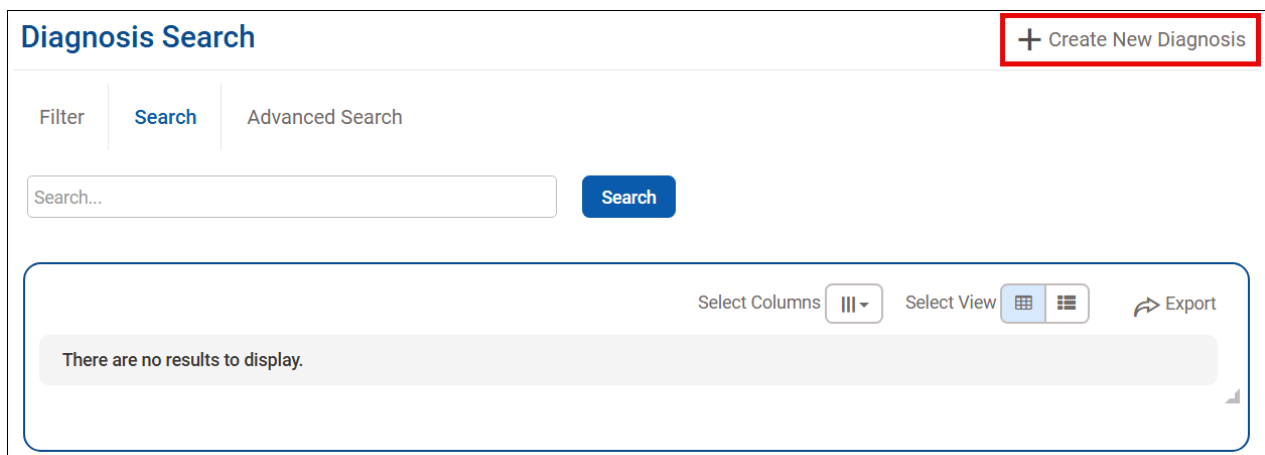
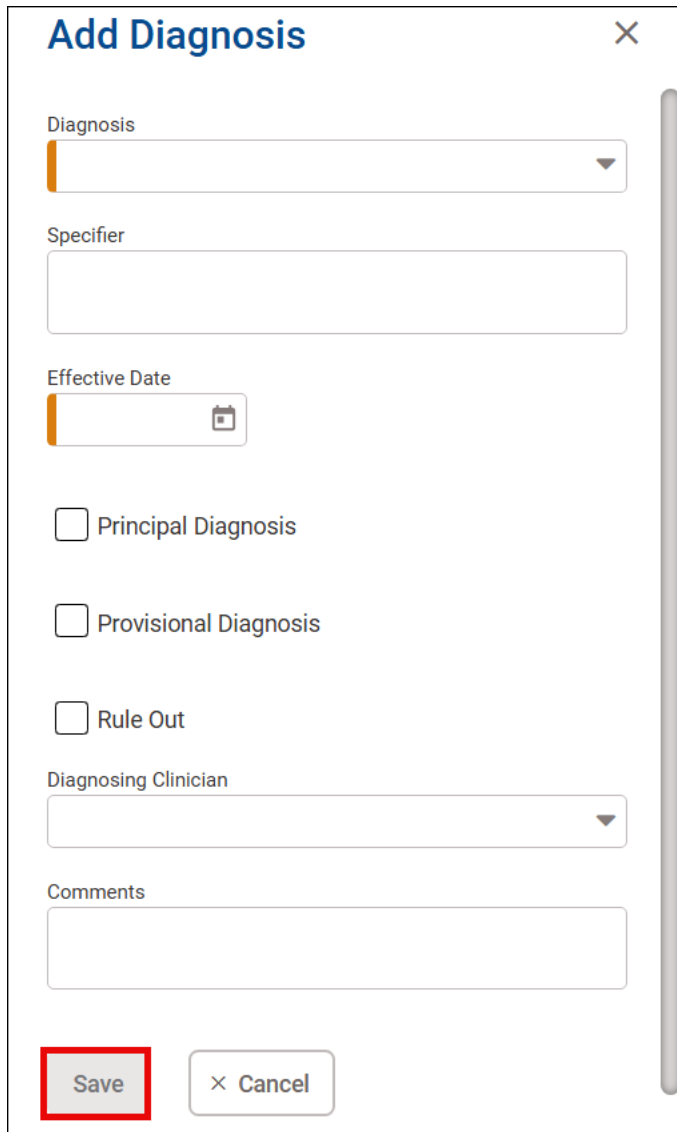


Figure 48: Create Diagnosis

- The Add Diagnosis screen will display. At a minimum, record the required fields, and indicate the diagnosis status. Use Table Add Diagnosis for information on completing each field.



Add Diagnosis [X]

Diagnosis
[Dropdown]

Specifier
[Text]

Effective Date
[Calendar]

☐ Principal Diagnosis

☐ Provisional Diagnosis

☐ Rule Out

Diagnosing Clinician
[Dropdown]

Comments
[Text]

Save [X Cancel]

Figure 49: Add Diagnosis

- Click **Save**.

Table 3: Add Diagnosis

Field	Description
Diagnosis	This dropdown field contains a list of all diagnoses added into WITS. Start typing in the name of the diagnosis to display possible options. You can also enter the International Classification of Diseases code.
Specifier	If there are any specifiers associated with the diagnosis, record them here.

Effective Date	The date the diagnosis was given.
Principal Diagnosis	The client can have multiple diagnoses. Check this box, if the diagnosis is the primary concern.
Provisional Diagnosis	If the diagnosis is provisional, check this box.
Rule Out	If a diagnosis has been ruled out, check this box.
Diagnosing Clinician	The clinician that diagnosed the client.
Comments	Any comments relevant to the diagnosis can be recorded here.

3.4.3. Program Enrollment

To enroll the client in a program:

1. From within the **Activity List** submenu, click **Program Enroll**.

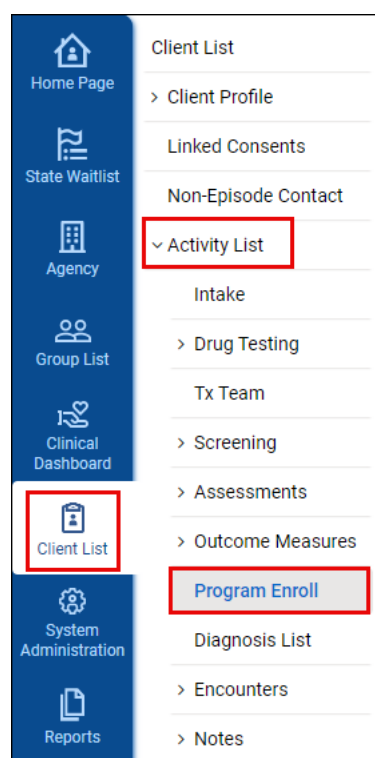


Figure 50: Accessing Program Enrollment

2. The Program Enrollment screen will display.
 - a. Any programs the client is currently enrolled in will display under Program Enrollment List.
 - b. If needed, the user can search for programs the client is assigned.

Program Enrollment

Program Name

Facility

Modality

Active Program Enrollments During Date Range

From

1/9/2023

To

1/9/2024

Search

× Clear

Program Enrollment List

+ Add Enrollment

Currently, there are no results to display for the Program Enrollment List.

Finish

Figure 51: Add Enrollment

- Under Program Enrollment List, click **+Add Enrollment**.
- The Program Enrollment Profile displays.
- Complete all required and relevant fields.
 - The client should be enrolled in the same level of care that was indicated in the assessment.

Program Enrollment Profile

Facility
Titan Treatment

Domain

Days on Wait List

Start Date
1/9/2024

Program Name

Program Staff
Wilson, Scott

Termination Reason

Notes

End Date

Date of Last Contact

Save

Save and Finish

× Cancel

Figure 52: Program Enrollment Profile

6. Click **Save and Finish**.

3.5. Encounters

When the provider delivers services to the client, those services will be captured as encounters.

NOTE: The client record must be active, and the client enrolled in a program to record an encounter.

1. From the Activity List submenu, click Encounters.

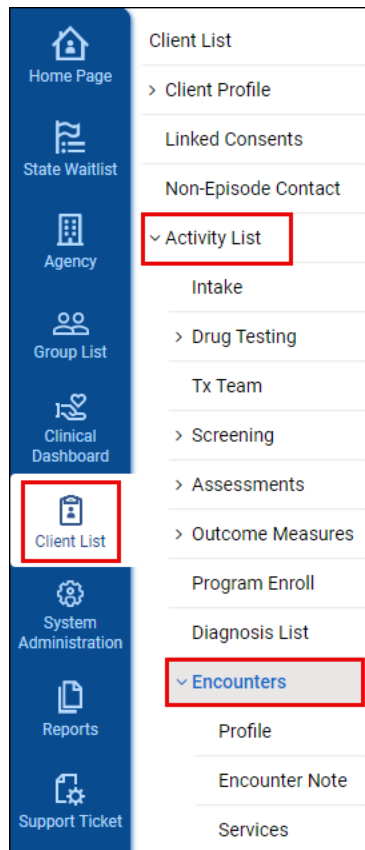


Figure 53: Accessing Encounters

2. The Encounter Search screen will display.
 - a. Past encounters will be listed in the Encounter List section.
 - b. A search can be performed to filter what encounters display.

Encounter Search

Start Date
1/10/2023

End Date
1/10/2024

Service

Program

Rendering Staff

Encounter Status

Allow Disclosure of Note
☐ Yes ☐ No

Search

× Clear

Encounter List

+ Add Encounter

↗ Export

Currently, there are no results to display for the Encounter List.

Figure 54: Add Encounter

3. Click **+Add Encounter**.
4. The Encounter screen displays.

Encounter

^ Hide Context Information

ENC ID	Billing Service Event Key		
Created By	Created Date	Updated By	Updated Date

Note Type

Billable ☒ Yes ☐ No

Program Name

Service

Start Date

End Date

Start Time

End Time

Duration

of Service Units / Sessions

Service Location

Emergency ☐ Yes ☐ No

Pregnant ☐ Yes ☐ No

Diagnoses for this Service

Primary

Secondary

Tertiary

Rendering Staff

Secondary Staff

Supervising Staff

Administrative Actions

Figure 55: Encounter Screen

5. Complete all required and relevant fields.

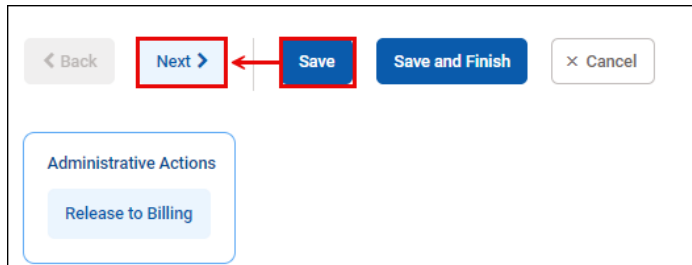


Figure 56: Save/Next Buttons

6. Click **Save** and then click **Next**.
7. The Encounter Notes screen displays.
8. While these fields are not required, they can be used to document the client's progress and link relevant fields of the treatment plan.
 - a. **NOTE:** Goals, objectives, and interventions can only be linked to an encounter if a [Treatment Plan](#) has been created for the client.

Encounter Notes

Goal Progress

Add Goals

+ Add Goals

Currently, there are no results to display for Add Goals.

Add Objectives

+ Add Objectives

Currently, there are no results to display for Add Objectives.

Add Interventions

+ Add Interventions

Currently, there are no results to display for Add Interventions.

Unsigned Notes

Allow Disclosure

☐ Yes
☒ No

Add Note
Sign Note

Signed Notes

Back
Next

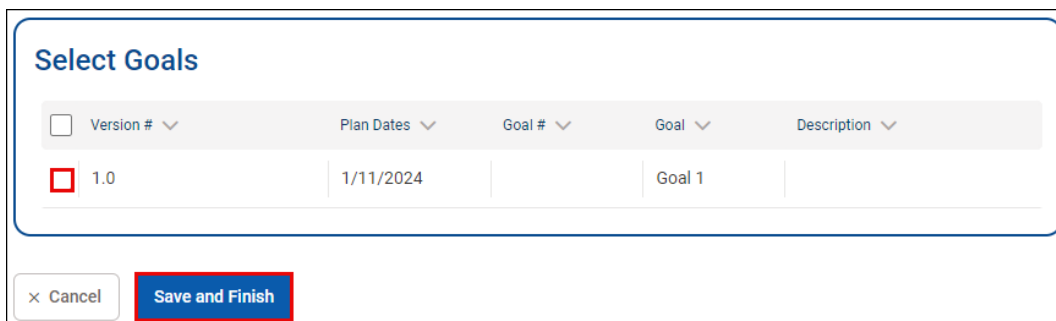
Save
Save and Finish
Cancel

Administrative Actions

Release to Billing

Figure 57: Encounter Notes

9. To link a goal, click **+Add Goals**.
10. The Select Goals screen will display.

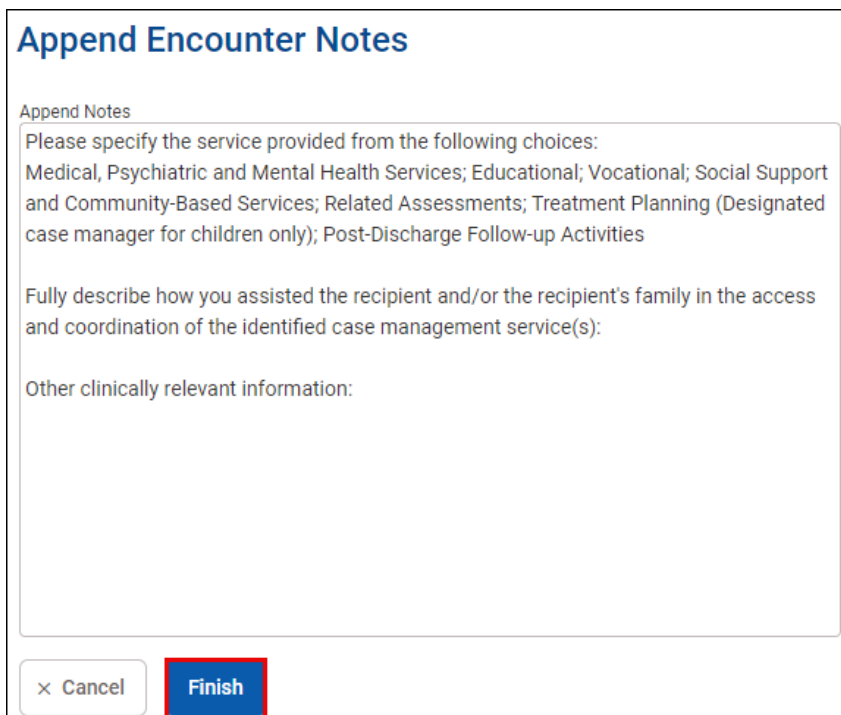


Select Goals

☐ Version #	Plan Dates	Goal #	Goal	Description
☒ 1.0	1/11/2024		Goal 1	

Figure 58: Select Goals

11. Check the box to the left of the goal, and then click **Save and Finish**.
12. Repeat steps 9 – 11 for adding objectives and interventions.
13. Notes can be added using the **Unsigned Notes** text box.
14. Click **Sign Note** to save the notes to the encounter.
 - a. Saved notes will display in the **Signed Notes** text box.
15. If there is a template that is used when adding notes, click **Add Note**.
16. The Append Encounter Notes screen will display.
 - a. If a template was created for the Append Notes text box, it will display here.
17. Complete the template.



Append Encounter Notes

Append Notes

Please specify the service provided from the following choices:
 Medical, Psychiatric and Mental Health Services; Educational; Vocational; Social Support and Community-Based Services; Related Assessments; Treatment Planning (Designated case manager for children only); Post-Discharge Follow-up Activities

Fully describe how you assisted the recipient and/or the recipient's family in the access and coordination of the identified case management service(s):

Other clinically relevant information:

Figure 59: Append Notes

18. Click **Finish**.
19. The notes will display in the Unsigned Notes text box.

Encounter Notes

Goal Progress

Add Goals

+ Add Goals

Goal #	Goal	Description
	Goal 1	

Add Objectives

+ Add Objectives

Obj #	Objective	Description
	Objective 1	

Add Interventions

+ Add Interventions

#	Intervention	Status
	Intervention 1	In Progress

Unsigned Notes

Comments

Entered by Willson, Scott, 1/24/2024 11:03:47 AM:

Please specify the service provided from the following choices:
Medical, Psychiatric and Mental Health Services; Educational, Vocational; Social Support and Community-Based Services; Related Assessments; Treatment Planning (Designated case manager for children only); Post-Discharge Follow-up Activities

Fully describe how you assisted the recipient and/or the recipient's family in the access and coordination of the identified case management service(s):

Allow Disclosure
☐ Yes ☒ No

Add Note Sign Note

Signed Notes

< Back Next > Save Save and Finish x Cancel

Administrative Actions

Release to Billing

Figure 60: Encounter Screen - Notes Added

20. Click **Sign Note**.
21. Once notes have been signed, the encounter can be released to billing.
22. Click **Release to Billing**.
23. The Release to Billing screen will display.
24. Select the appropriate **Client Group Enrollment** from the dropdown list.

Release To Billing

Client Group Enrollment

Save and Finish

× Cancel

Figure 61: Release to Billing

25. Click **Save and Finish**.

3.6. Level of Care Changes

During the life cycle of a client's treatment, updates may need to be made regarding the client's level of care.

NOTE: To make any of the following changes, the user will need to have the client's record active.

3.6.1. Outcome Measures Updates

As the client progresses through treatment, existing outcome measures may need to be reviewed, and new outcome measures may need to be recorded.

1. From the **Activity List** submenu, click on **Outcome Measures**.

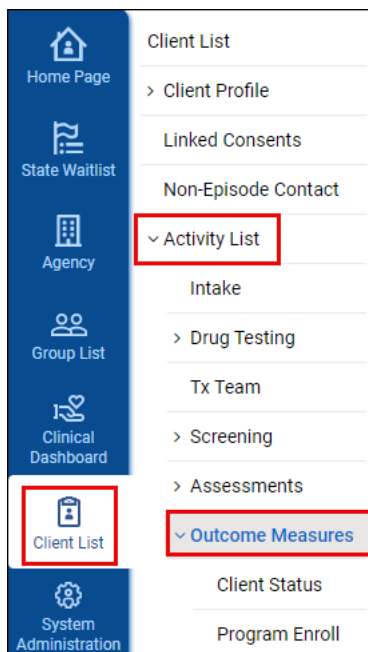


Figure 62: Accessing Outcome Measures

2. The Outcome Measures List screen will display.

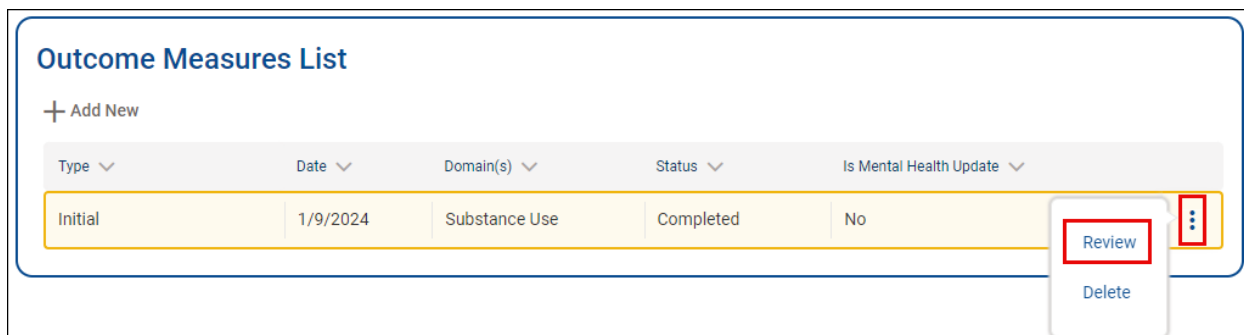


Figure 63: Review Outcome Measure

3. To the right of the Outcome Measure, click the **vertical ellipsis** and then click **Review**.

3.6.1.1. Update Outcome Measure

If a client's program is changing or they are being disenrolled in a program, a new outcome measure will need to be recorded. The existing outcome measure should not be edited.

To add an updated outcome measure for the client, click **+Add New** on the Outcome Measures screen.

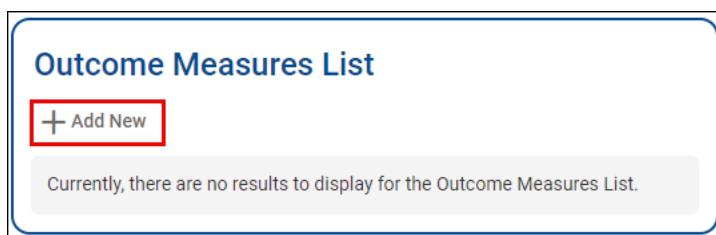


Figure 64: Add Update Outcome Measure

The new outcome measure will have the Type: Update.

Completing the update will follow the same process as creating the [Initial Outcome Measure](#). However, some completed fields from the initial outcome measure will auto populate and only need to be modified as needed.

Outcome Measures - Client Status

Date: 5/8/2025 Update

Pregnant: Not Applicable Due Date

Domains Selected Domains: Substance Use

Profile

Codependent/Collateral: ☒ Yes ☐ No Co-Occurring SA and MH Problem # of Prior SA Tx Episodes

Medication Assisted Tx SMI/SED Status

of times the client has attended a self-help program in the 30 days preceding the date of reference (admission or discharge) to treatment services. Includes attendance at AA, NA, and other self-help/mutual support groups focused on recovery from substance abuse and dependence.

Education

Education Status

Financial/Household

Employment Status Source of Income: Wages/Salary

Primary Payment Source: Medicaid Source of Income (Other)

Marital Status: Never Married What would you estimate your family's annual income to be: \$15,000.00

If married, how long? Health Insurance: Medicaid

Total Number of Marriages: 0 Living Situation

Legal

of Arrests in Past 90 Days Mental Health Legal Status

Legal History Selected Legal History

Substance Use

Rank	Substance	Severity	Frequency	Method	Detailed Drug Code
Primary:	Barbiturates	Moderate Problem/Dysfnc	3-6 times in the pas...	Oral	
Secondary:					
Tertiary:					

At what age did the client FIRST use the substances indicated above (if unknown, enter 97)

Primary: 21 Secondary Tertiary

of DAYS since LAST use of the substances indicated above:

Primary: Secondary Tertiary

Tobacco/Nicotine

Have you ever used Tobacco/Nicotine products?

Smoker Status?

Age of First Use

In the past 30 days, what tobacco/nicotine product did you use most frequently?

Other (Please Describe)

In the past 30 days, how often did you use tobacco/nicotine product(s)?

Back Next Save Save and Finish Cancel

Figure 65: Outcome Measure Update

NOTE: An Outcome Measure recording the client's current status is required before the currently enrolled program can be closed.

3.6.2. Program Changes

As a client's treatment progresses, the treatment program may need to be changed. If the program is no longer needed for whatever reason, the program will need to be closed in the client's record.

1. From the **Activity List** submenu, click on **Program Enroll**.

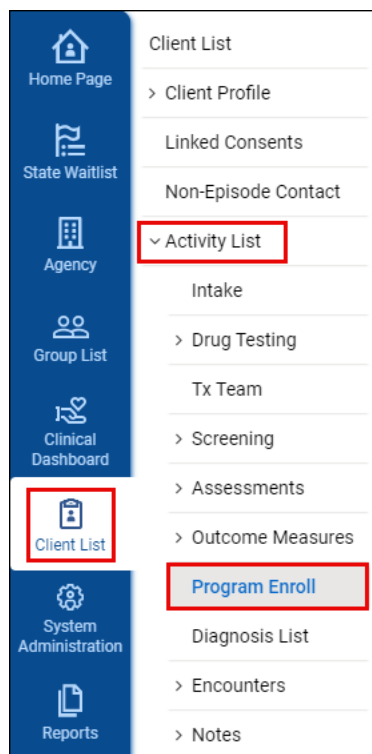


Figure 66: Accessing Program Enrollment - Update

2. Locate the current program for the client.
 - a. Use the search function if needed to locate the record.

Program Enrollment

Program Name

Facility

Modality

Active Program Enrollments During Date Range

From

1/9/2023

To

1/9/2024

Search

× Clear

Program Enrollment List

+ Add Enrollment

Program Name	Start Date	End Date	Facility	Notes
Intensive Outpatient	1/9/2024		Titan Treatment	

Review

Delete

Finish

Figure 67: Review Program Enrollment

- To the right of the enrollment click the **vertical ellipsis** and then click **Review**.
- While not identified as required fields, the following fields should be completed as appropriate.
 - End Date – When the program was terminated/completed. While not noted as required, this field must be completed.
 - Date of Last Contact – Record this if the client is no longer in contact with the agency. This becomes a required field when the End Date is entered.
 - Termination Reason – This could be anything from successful completion of the program to incarceration. While not noted as required, this field must be completed.
 - Notes – If any relevant information should be captured, provide it here.

Program Enrollment Profile

Facility

Titan Treatment

Domain

Substance Use

Days on Wait List

0

Start Date

1/9/2024

Program Name

Intensive Outpatient

Program Staff

Wilson, Scott

End Date

Date of Last Contact

Termination Reason

Notes

Save

Save and Finish

× Cancel

Figure 68: Program Enrollment Profile

- Click **Save and Finish**.

NOTE: The End Date and Termination Reason must be provided when closing out the program.

If a new program needs to be added for the client, follow the steps from [Program Enrollment](#).

3.6.3. Diagnosis List

The Diagnosis List allows the user to view the client's current and previous diagnoses. The user can also add a new diagnosis or change the status of a current diagnosis to Principal, Provisional or Ruled Out.

NOTE: Accessing this option requires the client record to be active.

- From the **Activity List** submenu, click **Diagnosis List**.

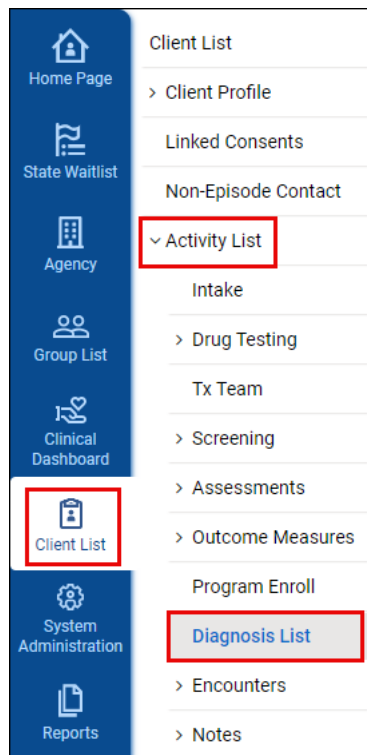


Figure 69: Accessing Diagnosis List

2. The Diagnosis List Search screen will display.
 - a. If needed a search can be performed to narrow the results on the page.
3. Click the **vertical ellipsis** to the right of the diagnosis.

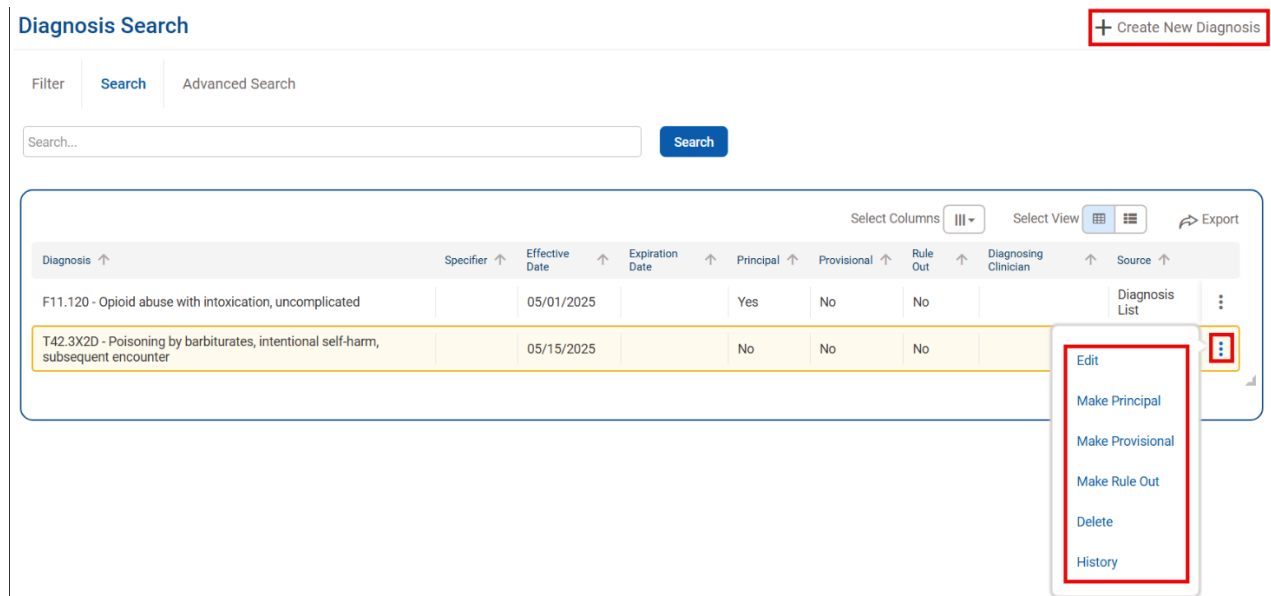


Figure 70: Diagnosis Actions

4. There are several options that may display depending on the current status of the diagnosis.
 - a. Make Principal – This action marks the selected diagnosis as principal.
 - b. Make Provisional – This action marks the selected diagnosis as provisional.
 - c. Make Rule Out – This action marks the selected diagnosis as ruled out.
 - d. Delete – This action will delete the diagnosis from the list.
 - e. History – This action shows the change history on the diagnosis.

History				
Showing 1-5 of 5				
Operation Timestamp	User Name	Entity Name	Operation Name	Context
01/11/2024 09:21:48 AM	Wilson, Scott	Diagnosis	Make Provisional	IsPrincipal = False, IsProvisional = True, Source = ADMH Placement Assessment
01/11/2024 08:57:24 AM	Wilson, Scott	Diagnosis	Revise Client Diagnosis Data	Diagnosis = Alcohol abuse, uncomplicated, EffectiveDate = 1/8/2024 12:00:00 AM, IsPrincipal = False, IsProvisional = False, IsRuleOut = False, Source = ADMH Placement Assessment, Staff Member = null, TreatmentDomains = System.Collections.Generic.List`1[Wits.Domain.AgencyModule.Vocabulary.TreatmentDomain]
01/11/2024 08:51:57 AM	Wilson, Scott	Diagnosis	Revise Client Diagnosis Data	Diagnosis = Alcohol abuse, uncomplicated, EffectiveDate = 1/8/2024 12:00:00 AM, IsPrincipal = False, IsProvisional = True, IsRuleOut = False, Source = ADMH Placement Assessment, Staff Member = null, TreatmentDomains = System.Collections.Generic.List`1[Wits.Domain.AgencyModule.Vocabulary.TreatmentDomain]
01/11/2024 08:51:49 AM	Wilson, Scott	Diagnosis	Make Provisional	IsPrincipal = True, IsProvisional = True, Source = ADMH Placement Assessment
01/10/2024 03:22:48 PM	Wilson, Scott	Diagnosis	Create Client Diagnosis List	Aggregate Weak Reference = null, ClinicalCase = Case 1: client = Reyes, Jaime, Diagnosis = Alcohol abuse, uncomplicated, EffectiveDate = 1/8/2024 12:00:00 AM, IsPrincipal = True, Source = ADMH Placement Assessment

Figure 71: Diagnosis History

5. Click **Edit** to open the Diagnosis window. The following changes can be made this way.
 - a. Expiration Date – This can be set if the diagnosis is no longer relevant.
 - b. Principal Diagnosis – This check box will mark the diagnosis as principal. It can also be unchecked if the diagnosis was marked in error.
 - c. Provisional Diagnosis - This check box will mark the diagnosis as provisional. It can also be unchecked if the diagnosis was marked in error.
 - d. Rule Out - This check box will rule out the diagnosis. It can also be unchecked if the diagnosis was ruled out in error.

Diagnosis

Diagnosis

F10.10 - Alcohol abuse, uncomplicated

Specifier

Effective Date

1/8/2024

Expiration Date

☐ Principal Diagnosis

☒ Provisional Diagnosis

☐ Rule Out

Save

Cancel

Figure 72: Diagnosis Window

6. Click **Save** to finalize changes.

To add a new diagnosis, click +Create New Diagnosis and follow the instructions under [Record Diagnosis](#) to capture the new information.

3.7. Discharge

Before a client can be discharged:

- An Outcome Measurement will need to be recorded to capture the client's current status if the last Outcome Measure is more than 45 days old. See [Outcome Measure Updates](#).
- Any open programs will need to be closed out. See [Program Changes](#).

NOTE: The client record must be active.

1. From the left navigation menu, click **Client List**.
2. In the submenu, click **Activity List** to expand its options.

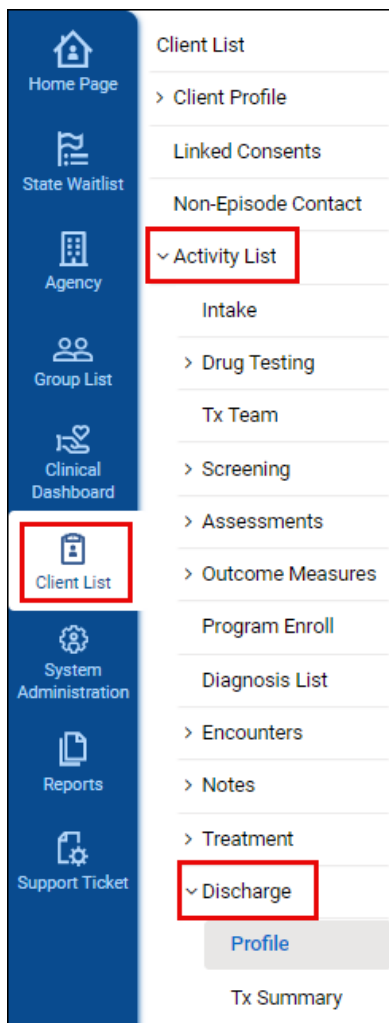
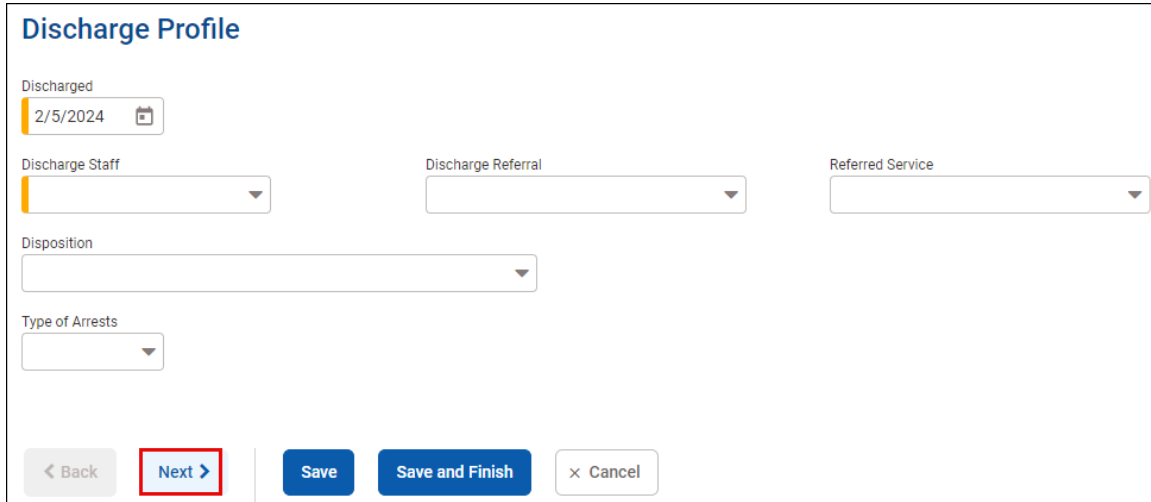


Figure 73: Accessing Discharge

3. Click **Discharge**.
4. The Discharge Profile screen will display.
5. Complete the required and relevant fields.



The screenshot shows the "Discharge Profile" form. At the top left, there is a "Discharged" label above a date field containing "2/5/2024" and a calendar icon. Below this, there are three dropdown menus: "Discharge Staff", "Discharge Referral", and "Referred Service". Further down is a "Disposition" dropdown menu, followed by a "Type of Arrests" dropdown menu. At the bottom of the form, there is a row of five buttons: "< Back", "Next >" (which is highlighted with a red border), "Save", "Save and Finish", and "x Cancel".

Figure 74: Discharge Profile

6. Click **Next**.
7. The Discharge screen will display providing a Treatment Summary.
 - a. There are some optional fields that can be completed based on established processes.

Discharge

Treatment Summary

Presenting Problem (In Client's Own Words)

Strengths, Abilities, Needs, and Preferences of Person Served - Client Statement Regarding Progress

Program Enrollment

Program Name ▾	Start Date ▾	End Date ▾	Facility ▾	Notes ▾
Treatment	1/10/2024	2/5/2024	Titans Treatment	

Services Rendered

Service ▾	# of Sessions ▾
H0007 SUD Crisis Intervention	1

Recommendations

< Back
Next >
Save
Save and Finish
× Cancel

Figure 75: Discharge Screen

8. Click **Save and Finish**.

Client is discharged. Do you want to close this case also?

Yes
× No

Figure 76: Close Case

9. The user will be asked if they want to close the case.
 - a. Click **Yes** if the client will receive no additional services from the provider.
 - b. Click **No** if the client will continue to receive services from the provider.
10. Selecting **Yes** will close the Intake record for the client.
 - a. The Date Closed field of the Client Intake is updated to show the record has been closed.

Intake Case Information

[^ Hide Context Information](#)

Case #
1

Created By
Wilson, Scott

Created Date
1/10/2024

Updated By
Wilson, Scott

Updated Date
2/5/2024

Intake Facility

Titans Treatment

Intake Staff

Wilson, Scott

Case Status

Closed

Initial Contact *

Walk-in

Initial Contact Date

Intake Date

1/10/2024

Pregnant

Not Applicable

Due Date

Prenatal Treatment

No

County

Jefferson

Primary Referral Source

Self (Individual)

Secondary Source of Referral

Referral Contact

HIV Positive

No

Injection Drug User

No

Problem Area

What is the most important thing you want that made you contact us?

Stop using drugs

Presenting Problems

Abuse Victim
Alcohol
Assault Victim
Criminal Justice
Daily Coping



Presenting Problems Selected

Drug

Other Presenting Problem Description

Special Initiative

Acquired Brain Disorders
Adult with Severe Emotional Disturbance
Adult with Organic Disorder w/o SED
Adult with Severe and Persistent Mental Illness
Child/Youth with Severe Emotional Disturbance



Special Initiative Selected

Inter-Agency Service

Child Protective Services (OCS)
Court/Legal Interface
DCSF
Developmental Disabilities
Domestic Violence



Inter-Agency Service Selected

Domains



Selected Domains

Treatment

Date Closed

2/5/2024

Finish

Figure 77: Client Intake - Closed

4. TREATMENT WORKFLOW RELATED FUNCTIONS

While completing the treatment workflow, it may be required of the user to perform other steps or functions. Those functions include:

- Adding a treatment team or member to a client's record.
- Referring a client to a different location or provider.
- Adding a client to a waitlist.
- Creating a treatment plan for the client.

4.1. Treatment Team

For some functions related to treatment to work properly, a treatment team member or group will need to be added to a client's record.

NOTE: The client record must be active to complete the following steps.

1. Click the **Activity List** submenu to expand its options.
2. Click **Tx Team**.

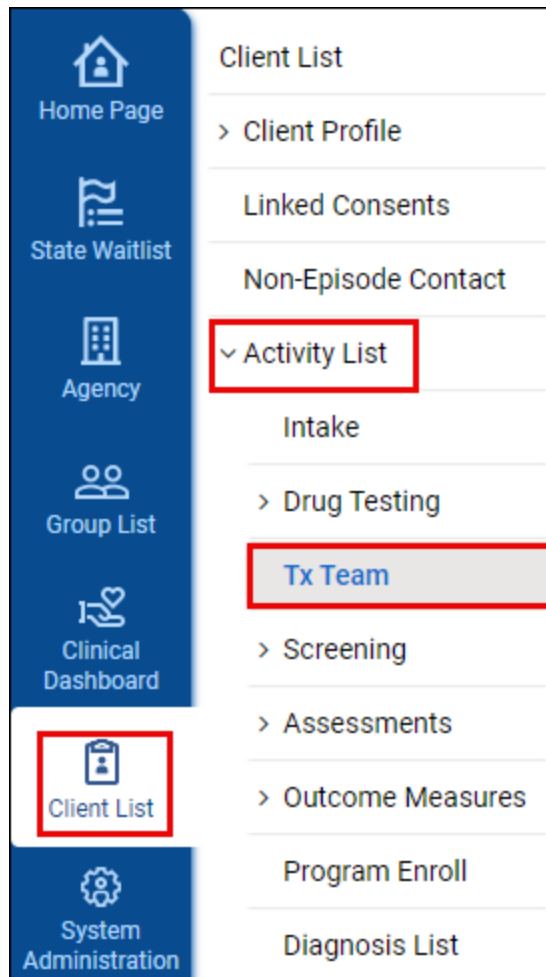


Figure 78: Accessing Treatment Team

3. The Treatment Team screen will display.

Treatment Team

+ Add Team Member
Assign Group

Currently, there are no results to display for Treatment Team.

Profile

Staff Name

Non Staff Name

Add Collateral Contact

Role/Relation

Start Date

End Date

Review Member

Primary Care Staff

Deny Access to Client Records

Treatment Sub-Teams
Recovery

Selected Sub-Teams

Notes

Finish

Figure 79: Treatment Team

At this point, the user can either assign a team member or a group to the client's record.

4.1.1. Add Team Member

To add a team member:

1. Click **+Add Team Member**.
2. The Profile section will become active.
3. Complete all required and relevant fields.
 - a. While not listed as required fields, **Staff Name** or **Non Staff Name** must be chosen from their respective dropdown lists.
 - b. Collateral contacts display in the Non Staff Name dropdown. If a collateral contact needs to be added, click **Add Collateral Contact**.

Treatment Team

+ Add Team Member

Assign Group

Currently, there are no results to display for Treatment Team.

Profile

Staff Name

Non Staff Name

Add Collateral Contact

Role/Relation

Start Date

End Date

Review Member

Primary Care Staff

Deny Access to Client Records

Treatment Sub-Teams

Recovery

Selected Sub-Teams

Notes

Save

Save and Finish

Cancel

Figure 80: Add Treatment Team Member

4. Click **Save and Finish**.

4.1.2. Assign Treatment Team Group

To assign a group:

1. Click **Assign Group**.
2. Available Groups will be listed on the left and can be added to the Selected Groups.

Select Groups to Add to Treatment Team

Available Groups

Treatment Team 1

Selected Groups

Assign

Cancel

Figure 81: Assign Treatment Team Group

3. Click **Assign** to save changes.
4. Click **Finish** to leave the Treatment Team screen.

4.2. Referral

If a client needs to be referred to another provider, a linked consent will need to be generated before the referral can be entered.

NOTE: The client's record will need to be active for the user.

1. From the **Activity List** submenu, click **Consent**.

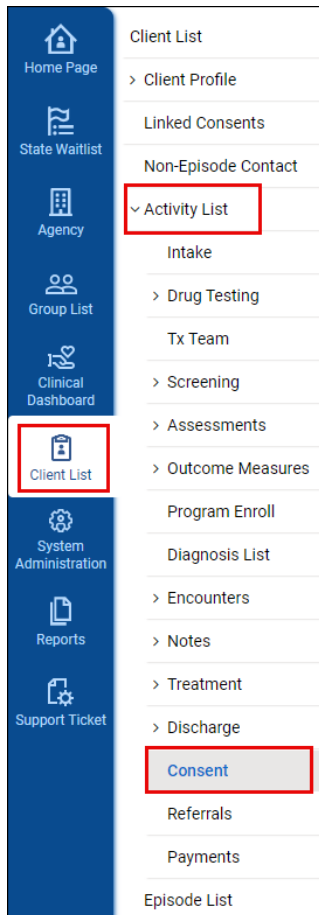


Figure 82: Accessing Consent

2. The screen Client Consent List will display.
 - a. Existing consents will display in the Linked Consent List section.

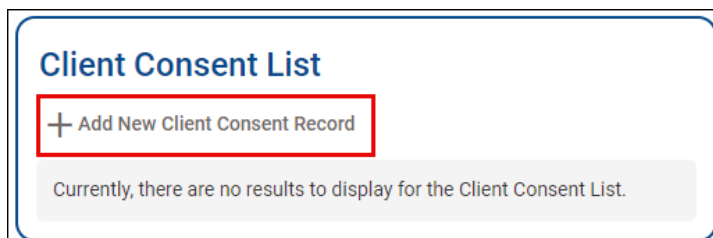


Figure 83: Add Client Consent

3. Click **+Add New Client Consent Record**.
4. The question “Is this related to a waitlist record?” will be asked.



Is this related to a waitlist record?

Yes

Figure 84: Related to Waitlist Record?

5. Click **Yes** or **No** as appropriate.
6. The Client Disclosure Agreement screen displays.

Client Disclosure Agreement

[^ Hide Context Information](#)

Note: Consented information may not be redisclosed.

Client Name Reyes, Jaime	Unique Client Number Q654044IV464644	Disclosed From Agency Titans Treatment
------------------------------------	--	--

Entities with Disclosure Agreements

System Agency

☒ Yes ☐ No **a**

Disclosed To Agency Facility **b**

Disclosed To Entity (Non System Agency)

Purpose for Disclosure

Earliest Date of Services to be Consented

Has the client signed the paper agreement form ☐ Yes ☒ No Date Client Signed Consent

Client Information To Be Consented

*Expiration type is required for disclosure activities.

Expiration Type

*Expiration type is required for Disclosure activities.

Client Information Options

- ADMH Placement Assessment
- ADMH Update Assessment
- Admission
- ASAM
- ATR Eligibility Screen
- Behavioral Health Assessment
- CAGE-AID Screening
- Client Information (Profile)
- Client Screening
- Consent
- CONTINUUM Triage™ Assessment

Disclosure Selection

Comments

Other Disclosures

Figure 85: Client Disclosure Agreement

7. Complete all required and relevant fields. Most of the fields are self-explanatory. However, a couple of fields are described as follows:
 - a. System Agency
 - i. Set to **Yes** if referring the client to a different provider.
 - ii. Set to **No** if referring the client to an external entity, such as a physician, hospital, etc.
 - b. Agency and Facility – Agency must be selected first.
 - c. Information to be Consented – The client's information to be shared with the consenting agency is selected here, as well as setting an expiration date if any.
8. Once the Expiration Type for Client Information to Be Consented is set, a **+Days** field will display.
 - a. This field determines how long after the expiration trigger information with the agency will be shared.

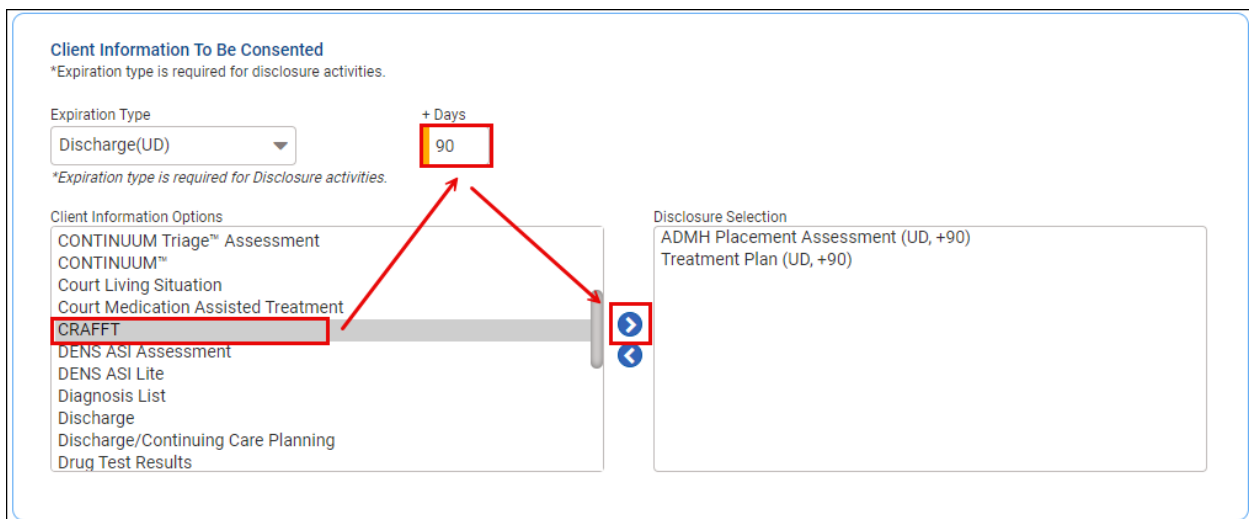


Figure 86: Shared Information Expiration Date

9. For each **Client Information Option** shared the **+Days** field to the right of **Expiration Type** must be reentered.
10. Click **Save and Finish**.

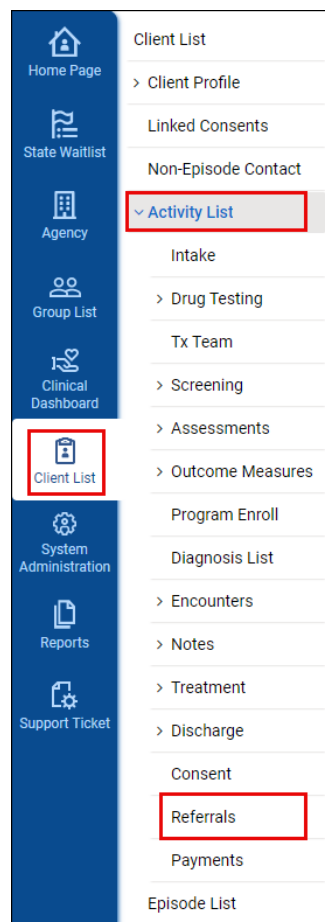


Figure 87: Accessing Referrals

11. From the **Activity List** submenu, click **Referrals**.
12. The Client Referral List screen will display.
 - a. Any current/previous referrals will be listed here.

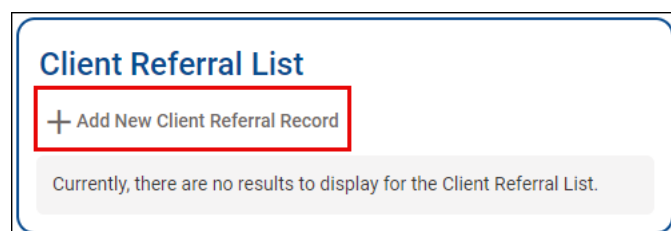


Figure 88: Add Referral Record

13. Click **+Add New Client Referral Record**.
14. The Referral screen displays.
15. Complete all required and relevant fields.

Referral

Referred By

Agency
Titan Treatment

Facility
Titan Treatment

Staff Member
Wilson, Scott

Program

State Reporting Category

Reason

If Other

Is Consent Verification Required?
☐ Yes ☐ No

Is Consent Verified?
☐ Yes ☐ No

Continue This Episode of Care?
☒ Yes ☐ No

Comments

Referral Status
Referral Created/Pending

Projected End Date

Created Date
1/10/2024 3:10 PM

Save Save and Finish × Cancel

Referred To

Signed Consents

Agency
Titan Treatment

Facility

Staff Member

Program

State Reporting Category

Non-System Agency

Non-System Modality

Non-System Specifier

Appt Date
Undetermined

Consents Granted

Figure 89: Referral Form

16. Click **Save and Finish**.

17. The referral will be listed under the Client Referral List in a pending status.

Client Referral List						
+ Add New Client Referral Record						
Name ▾	Referred To Agency ▾	Referred To Facility ▾	Non System Agency ▾	Referred To Modality ▾	Referral Status ▾	
Reyes, Jaime	Montgomery Metro Treatment Center	Mtg Metro Methadone		Ambulatory- Non-Intensive Outpatient	Referral Created/Pending	⋮

Figure 90: Referral Status

The referral will remain in this status until the referred to agency makes a decision about the referral.

4.3. State Waitlist

The State Waitlist module is used to manage client referrals and waitlist activities.

Click on **State Waitlist** from the left navigation menu to access this module.

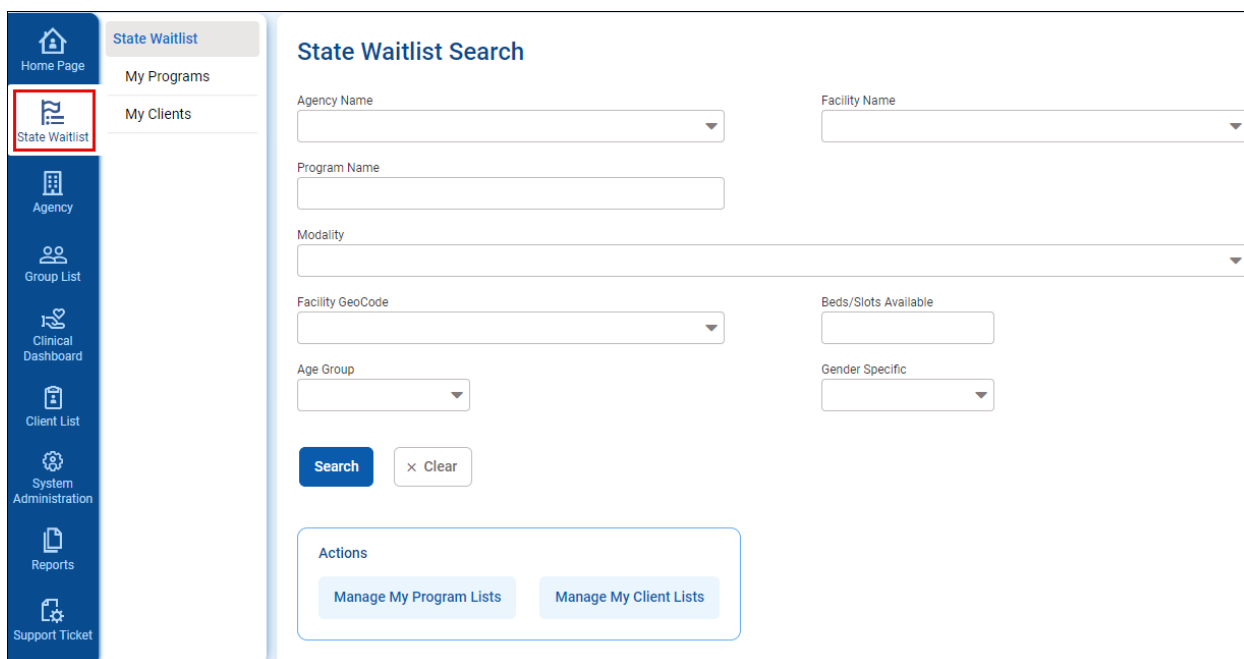


Figure 91: Accessing State Waitlist

Below the Actions section, the State Waitlist section displays any agency that has a client on a waitlist (referrals included).

Search may be used to narrow the list of agencies listed.

Results will display in the section State Waitlist List.

State Waitlist Search

Agency Name

Facility Name

Program Name

Modality

Facility GeoCode

Beds/Slots Available

Age Group

Gender Specific

Actions

State Waitlist List

Agency/Facility	Facility City	Program	Modality	Available Program Slots	# on Waitlist	Age/Gender	
/Barbour County		Intensive Outpatient	Ambulatory-Intensive-Outpatient	100	1	None/None	⋮
/Barbour County		Outpatient	Ambulatory- Non-Intensive Outpatient	100	1	None/None	⋮

Figure 92: State Waitlist Search Results

Two actions, reviewing the list and facility details, can be taken on the search results by clicking the **vertical ellipsis** and then selecting one of two options.

State Waitlist List

Agency/Facility	Facility City	Program	Modality	Available Program Slots	# on Waitlist	Age/Gender	
Administrative Agency/Barbour County		Intensive Outpatient	Ambulatory-Intensive-Outpatient	100	1		⋮
Administrative Agency/Barbour County		Outpatient	Ambulatory- Non-Intensive Outpatient	100	1		⋮

Figure 93: Waitlist Actions

4.3.1. Review List

Clicking **Review List** will display the Client Waitlist screen.

Results can be narrowed by using **Search**.

Clients are listed in the Client Waitlist List section. To take an action on a client, click the vertical ellipsis and choose one of three options.

- **Accept** – The client is to be accepted into the agency’s program.
 - The originating agency will receive an email of the client’s acceptance.
 - If the client was not referred through the Referral functionality in WITS, the email will also state that a referral and consent need to be completed for the client.
- **Reject** – Do not accept a client into the agency’s program.
 - Rejected clients cannot be referred to the same facility at a later date.

- **Delete** – Delete the client from the waitlist.

Client Waitlist

Agency
Administrative Agency

Facility
Barbour County

Program Name
Intensive Outpatient

Modality
Ambulatory-Intensive-Outpatient

Available Slots
100

Age/Gender
None/None

Statuses
Pending
Accepted
Rejected
Removed
Closed

Selected Status(es)

Finish Search × Clear

Client Waitlist List

+ Add Client to Waitlist

Waitlist ID	Placed by Agency	Gender	Age	Due Date	HIV Tested	IV Drug User	Days Waiting	Priority	
10	Montgomery Metro Treatment Center	Male	44		Yes	Denies	92	0	Pending

Accept
Reject
Delete

Figure 94: Client Waitlist

Regardless of the option selected, the user will need to click **Yes** to confirm their choice.

Are you sure you want to accept this client into the program?

Yes × No

Figure 95: Confirm Selection

If accepted, the client will now be listed in the accepting agency/facility's client list.

4.3.2. Facility Details

Clicking **Facility Details** will open a separate window providing general information and special services provided by the facility.

Special Services

Agency Name

Administrative Agency

Facility Name

Barbour County

Currently, there are no results to display for Special Populations Served.

General Information

Service Information

Details

Gender-specific Policy?

Accepts men and women

Figure 96: Facility Details

4.3.3. My Programs

My Programs can be accessed by clicking **My Programs** from the submenu or by clicking **Manage My Program Lists** from the State Waitlist Search screen.

Home Page

State Waitlist

My Clients

Agency

Group List

Clinical Dashboard

Client List

System Administration

Reports

Support Ticket

State Waitlist Search

Agency Name

Administrative Agency

Facility Name

Barbour County

Program Name

Modality

Facility GeoCode

Beds/Slots Available

Age Group

Gender Specific

Search

× Clear

Actions

Manage My Program Lists

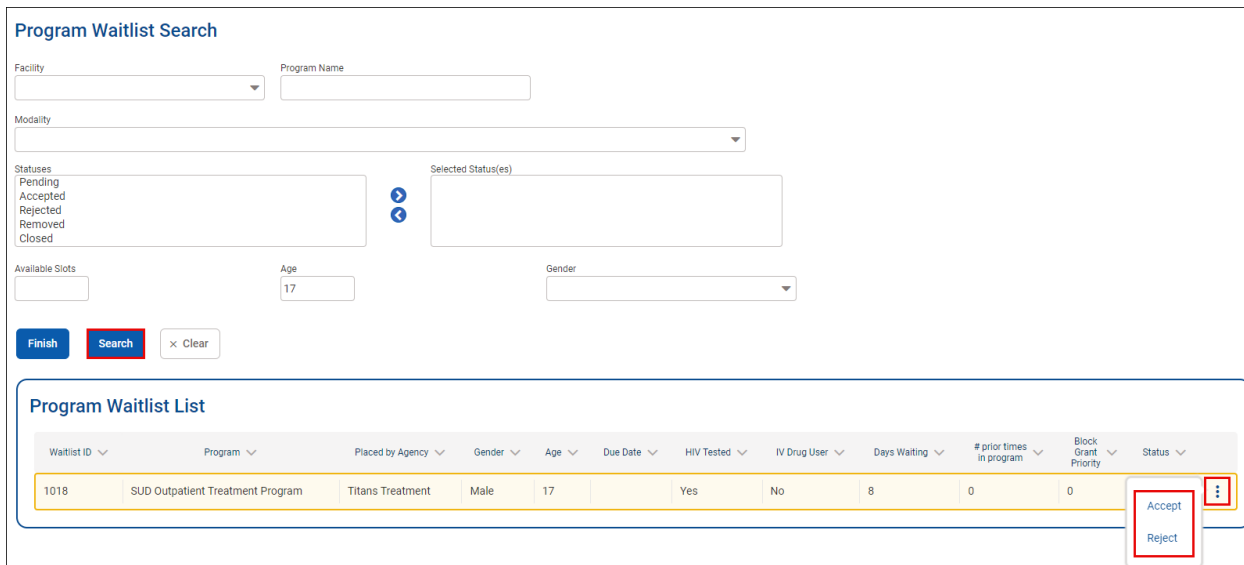
Manage My Client Lists

Figure 97: Accessing My Programs

The Program Waitlist Search screen will display. This screen allows the agency to manage their waitlist based on the programs they offer.

Search can be used to narrow the listed results.

From this screen, clients on a waitlist by program can be accepted or rejected.



Program Waitlist Search

Facility: Program Name:

Modality:

Statuses: Pending, Accepted, Rejected, Removed, Closed

Selected Status(es):

Available Slots: Age: Gender:

Finish **Search**

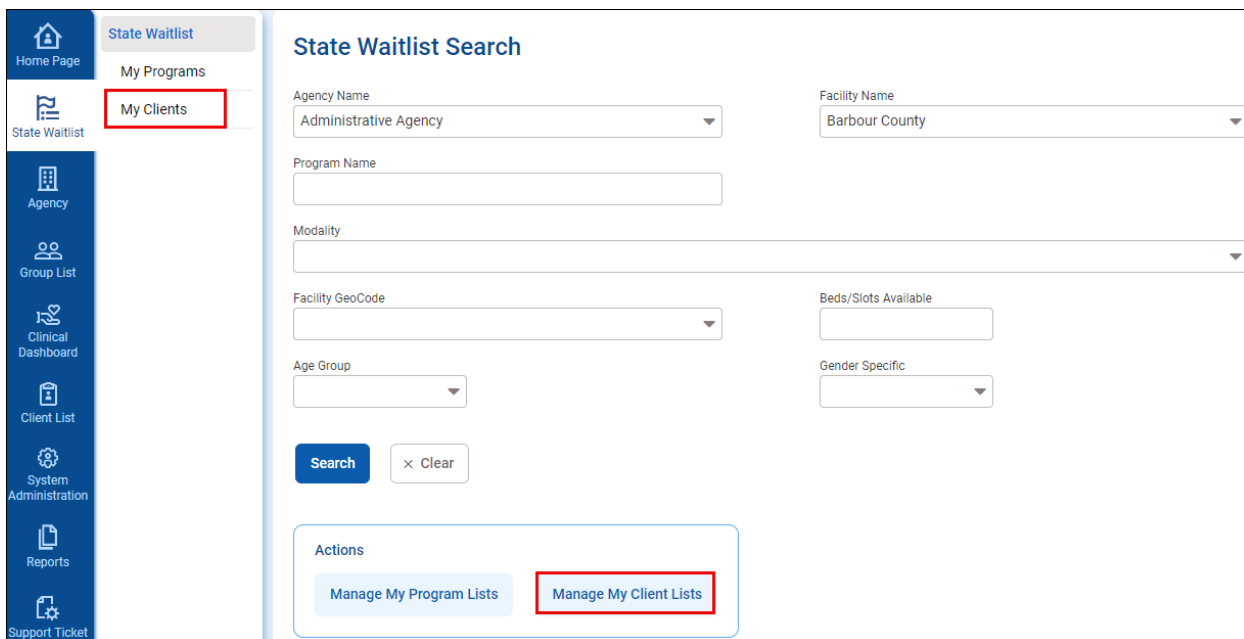
Program Waitlist List

Waitlist ID	Program	Placed by Agency	Gender	Age	Due Date	HIV Tested	IV Drug User	Days Waiting	# prior times in program	Block Grant Priority	Status
1018	SUD Outpatient Treatment Program	Titans Treatment	Male	17		Yes	No	8	0	0	Accept Reject

Figure 98: Program Waitlist

4.3.4. My Clients

My Clients can be accessed by clicking **My Clients** from the submenu or by clicking **Manage My Client Lists** from the State Waitlist Search screen.



State Waitlist Search

Agency Name: Facility Name:

Program Name:

Modality:

Facility GeoCode: Beds/Slots Available:

Age Group: Gender Specific:

Search

Actions

Figure 99: Accessing My Clients

The Client Waitlist Search screen will display. This screen allows the agency to manage their waitlist by clients.

Search can be used to narrow the listed results.

From this screen, the client's waitlist profile can be reviewed, or the client can be removed from the waitlist.

Client Waitlist Search

Client First Name

Client Last Name

Unique Client Number

Waitlist ID

Agency

Program Name

Modality

Statuses

☐ Pending
☐ Accepted
☐ Rejected
☐ Removed
☐ Closed

Selected Status(es)

Days Waiting

Age

Gender

Pregnant

HIV

IV Drug Use

Finish

Search

× Clear

Client Waitlist List

Waitlist ID	Client Name	Agency/Facility	Program Name	Days Waiting	Priority	HIV Tested	IV Drug User	Due Date	Age	Gender	Status
7	Stark, Anthony	Administrative Agency/Administrative Unit	SOR	677	0	No	No		45	Male	

Review

Delete

Figure 100: Client Waitlist

4.3.5. Add Client to Waitlist

To add a client to a facility's program waitlist:

1. Click **State Waitlist** from the left navigation menu.
2. **Search** for the agency-facility and/or program in question.
3. To the right of the desired result, click the **vertical ellipsis** and then click **Review List**.

Home Page

State Waitlist

My Programs

My Clients

State Waitlist

Agency

Group List

Clinical Dashboard

Client List

System Administration

Reports

Support Ticket

State Waitlist Search

Agency Name

Titans Treatment

Facility Name

Program Name

Modality

Facility GeoCode

Beds/Slots Available

Age Group

Gender Specific

Search

Clear

Actions

Manage My Program Lists

Manage My Client Lists

State Waitlist List

Agency/Facility	Facility City	Program	Modality	Available Program Slots	# on Waitlist	Age/Gender	
Titans Treatment/Titans Treatment	Birmingham	Treatment	Ambulatory-Intensive-Outpatient	8	0		Review List Facility Details
Titans Treatment/Titans Treatment	Birmingham	Substance Use	Ambulatory- Non-Intensive Outpatient	20	0		

Figure 101: Adding Client to Waitlist

4. The Client Waitlist screen will display.

Client Waitlist

Agency	Titans Treatment	Facility	Titans Treatment
Program Name	Treatment		
Modality	Ambulatory-Intensive-Outpatient		
Available Slots	8	Age/Gender	None/None
Statuses	Selected Status(es)		
Pending Accepted Rejected Removed Closed	 		

Finish **Search** **× Clear**

Client Waitlist List

 Add Client to Waitlist

Currently, there are no results to display for the Client Waitlist List.

Figure 102: Client Waitlist - Add

5. Click **+Add Client to Waitlist**.
6. Several fields will auto populate and are read only.
7. Complete the required and relevant fields.

Client Waitlist Profile

Agency Titans Treatment	Facility Titans Treatment	Age/Gender None/None
Program Name Treatment	Modality Ambulatory-Intensive-Outpatient	
Available Slots 8	Waitlist Status Pending	Date on Waitlist
Date Closed 	Client Name Type here to search...	Unique Client Number
Gender 	DOB 	Last 4 of SSN
Pregnant 	Due Date 	IV Drug User
HIV Tested 		
Other Priority Options All Other
Contract
KY
Pregnant/IV Users
State Probation/Parole		Selected Priority Options
BG Priority 	Add client to all readiness lists for this modality? ☐ Yes ☒ No	
Rejection Reason 		

Figure 103: Client Waitlist Profile

8. Click **Save and Finish**.

4.4. Treatment Plan

A treatment plan can be created for the client.

NOTE: This function requires the user to have the client record active.

To create a treatment plan:

1. From the **Activity List** submenu, click **Treatment** and then **Treatment Plan**.

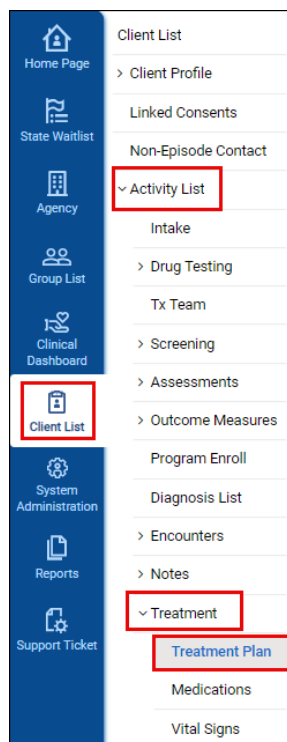


Figure 104: Accessing Treatment Plan

2. Click **Treatment Plan** under the Treatment submenu.
3. The Treatment Plan screen will display.
 - a. Previous plans for the client will be listed here.

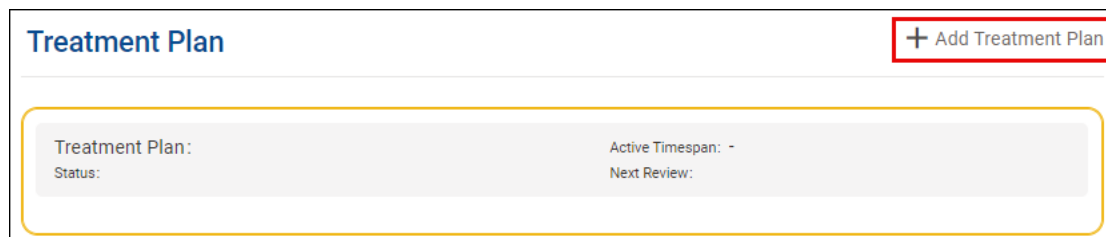


Figure 105: Add Treatment Plan

4. Click **+Add Treatment Plan**.
5. The Add Treatment Plan window will open.
6. Complete all required and relevant fields.
 - a. Copy values from Active Plan if available – If there was already a treatment plan active, this box will transfer data from that plan into the new one being created.

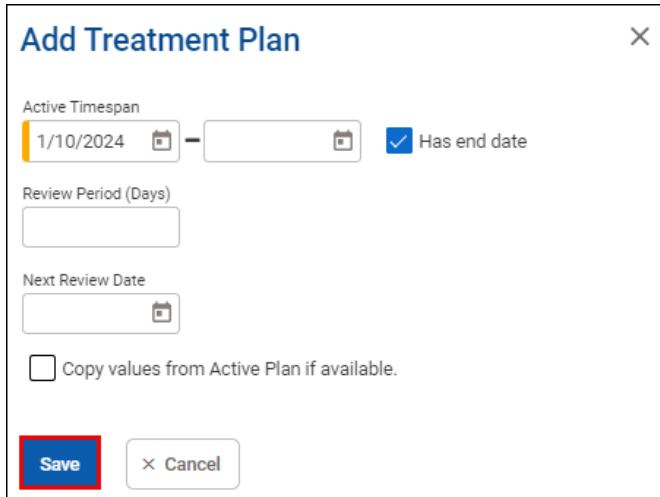
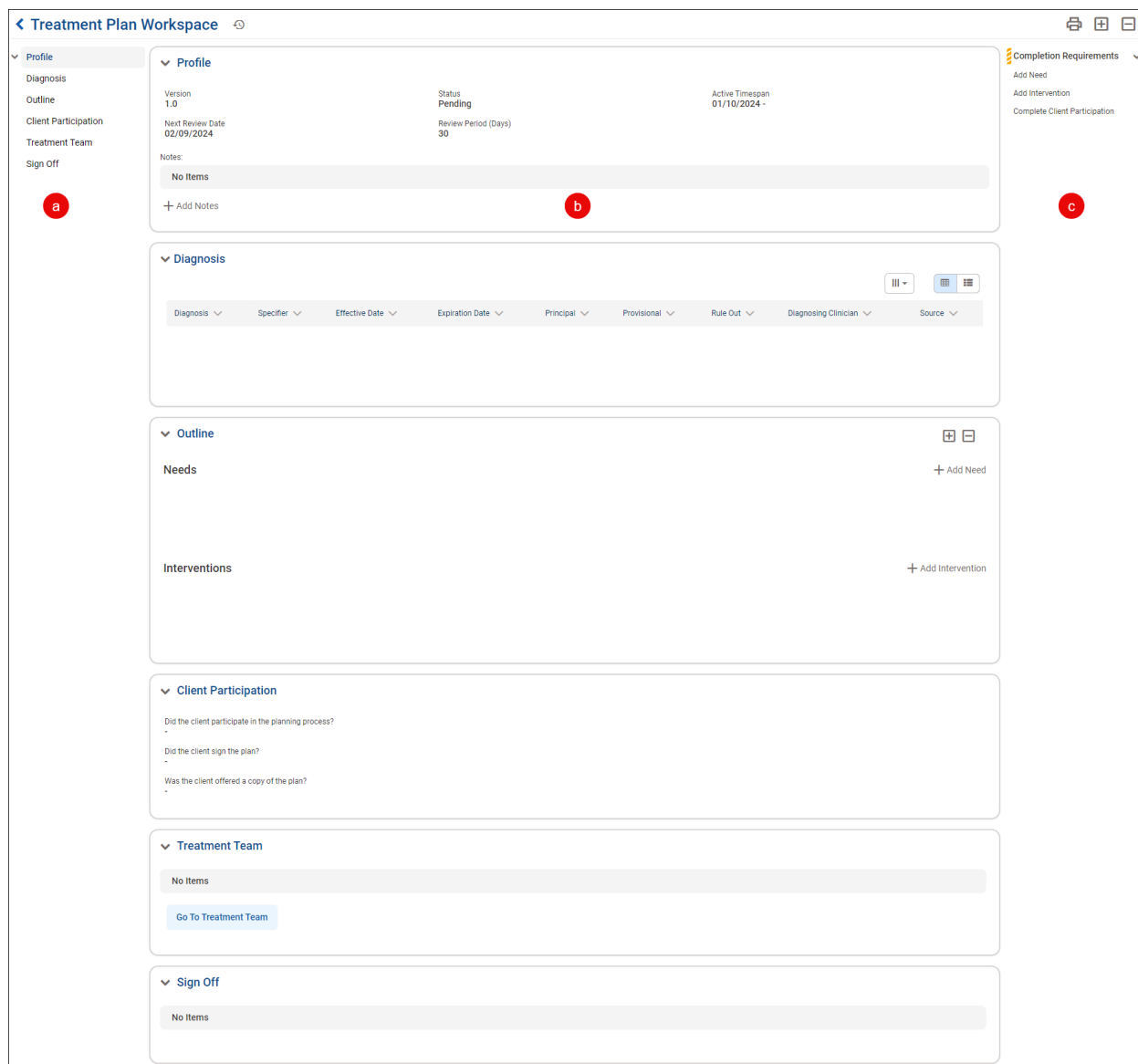
The image shows a software window titled "Add Treatment Plan" with a close button (X) in the top right corner. The window contains several input fields and a checkbox. The "Active Timespan" section has a date field with "1/10/2024", a minus sign, another empty date field, and a checked checkbox labeled "Has end date". Below this is a "Review Period (Days)" field. The "Next Review Date" section has an empty date field. At the bottom, there is a checkbox labeled "Copy values from Active Plan if available." and two buttons: a blue "Save" button and a grey "Cancel" button with an X icon.

Figure 106: Add Treatment Plan Window

7. Click **Save**.
8. The Treatment Plan Workspace displays.
 - a. The left side displays the different sections of the plan. Clicking on one will navigate to the selected plan workspace section.
 - b. The middle section is the workspace.
 - c. Completion Requirements are listed on the right.
 - d. As this workspace is completed, additional requirements will display.



Treatment Plan Workspace

Profile

Version 1.0 Status Pending Active Timespan 01/10/2024

Next Review Date 02/09/2024 Review Period (Days) 30

Notes: No Items + Add Notes

Diagnosis

Diagnosis Specifier Effective Date Expiration Date Principal Provisional Rule Out Diagnosing Clinician Source

Outline

Needs + Add Need

Interventions + Add Intervention

Client Participation

Did the client participate in the planning process? -

Did the client sign the plan? -

Was the client offered a copy of the plan? -

Treatment Team

No Items

Go To Treatment Team

Sign Off

No Items

Completion Requirements

Add Need Add Intervention Complete Client Participation

Figure 107: Treatment Plan Workspace

9. Complete all sections as required.

Below is an explanation of each section.

4.4.1. Profile

Most of the profile information will be prepopulated when the plan is initially created. However, there is an option to add notes if needed.

1. Click **+Add Notes**.

2. The Notes window will open.
3. Set the note's **Type**.
4. Enter comments in the **Note** text box.

Type

Note

Save

× Cancel

5. Click **Save**.

This section lists the client's diagnosis.

▼

Diagnosis

III -

☰

☷

Diagnosis ▼	Specifier ▼	Effective Date ▼	Expiration Date ▼	Principal ▼	Provisional ▼	Rule Out ▼	Diagnosing Clinician ▼	Source ▼
F10.120 - Alcohol abuse with intoxication, uncomplicated		01/10/2024		Yes	Yes	No		ADMH Placement Assessment
F55.8 - Abuse of other non-psychoactive substances		01/10/2024		No	Yes	No		ADMH Placement Assessment

4.4.3. Outline

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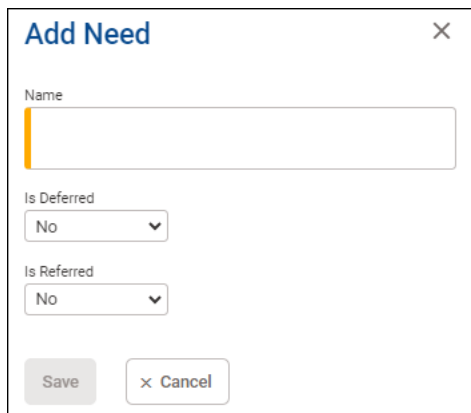
Outline

Needs + Add Need

Interventions + Add Intervention

Figure 111: Needs and Interventions

1. Click **+Add Need** to open the Add Need window.



Add Need ×

Name

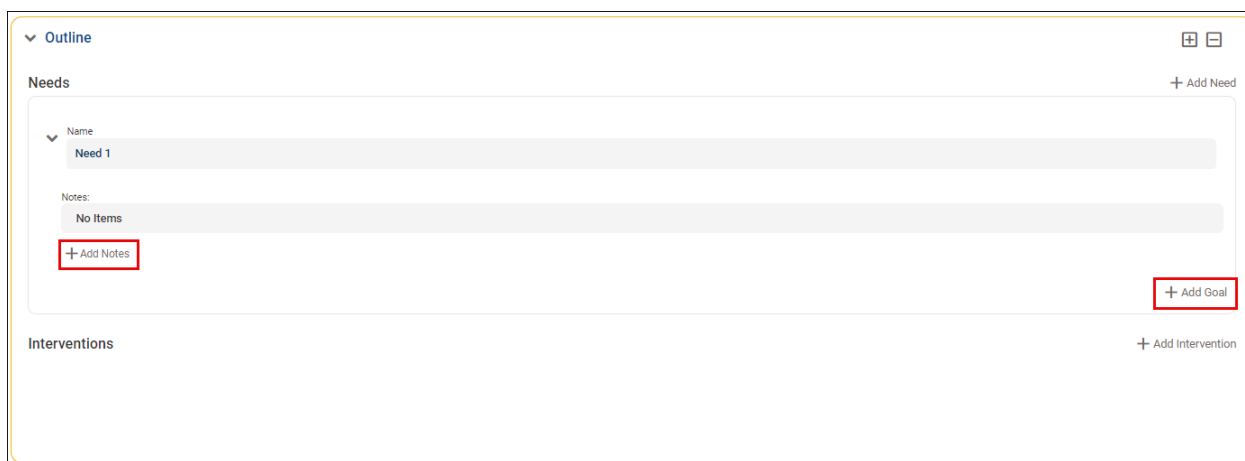
Is Deferred
No

Is Referred
No

Save × Cancel

Figure 112: Add Need

2. Complete fields as necessary or required and click **Save** when finished.
3. The Outline will update and display Notes and Goals for each created Need.
 - a. A goal will need to be added to each need.



Outline

Needs + Add Need

Interventions + Add Intervention

Goals + Add Goal

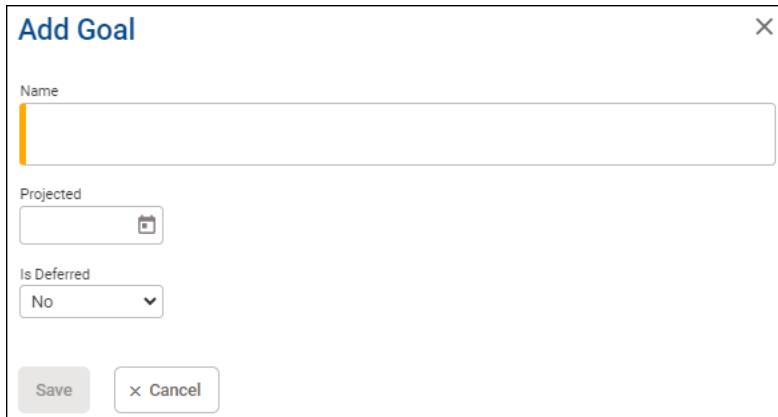
Need 1

Notes: No Items + Add Notes

Figure 113: Outline with Added Need

4. Click **+Add Note** to create a note the same as in the Profile section.

5. Click **+Add Goal** to open the Add Goal window.



The **Add Goal** window is a modal dialog with a close button (X) in the top right corner. It contains the following fields:

- Name:** A text input field with a yellow vertical bar on the left side.
- Projected:** A date picker field with a calendar icon.
- Is Deferred:** A dropdown menu currently set to "No".
- Buttons:** "Save" and "Cancel" buttons at the bottom.

Figure 114: Add Goal

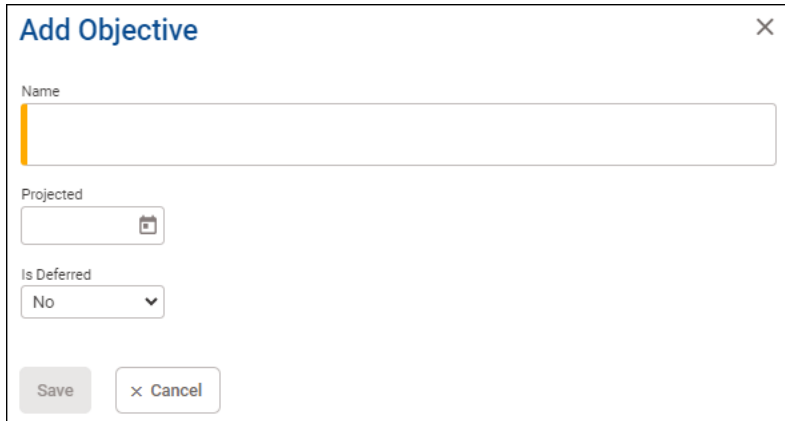
6. Complete fields as necessary or required and click **Save** when finished.
7. The Outline will update and display Notes and Objective for each created Goal.
 - a. At least one objective will need to be added to each goal.



The **Outline** window shows a hierarchical view of the treatment plan. It includes sections for Needs, Goals, and Interventions. The "Need 1" section is expanded, showing "Goal 1". The "Add Notes" button for Goal 1 and the "Add Objective" button for Goal 1 are highlighted with red boxes. The "Add Objective" button is located at the bottom right of the Goal 1 section.

Figure 115: Outline with Goal Added

8. Click **+Add Objective** to open the Add Objective window.



Add Objective [X]

Name

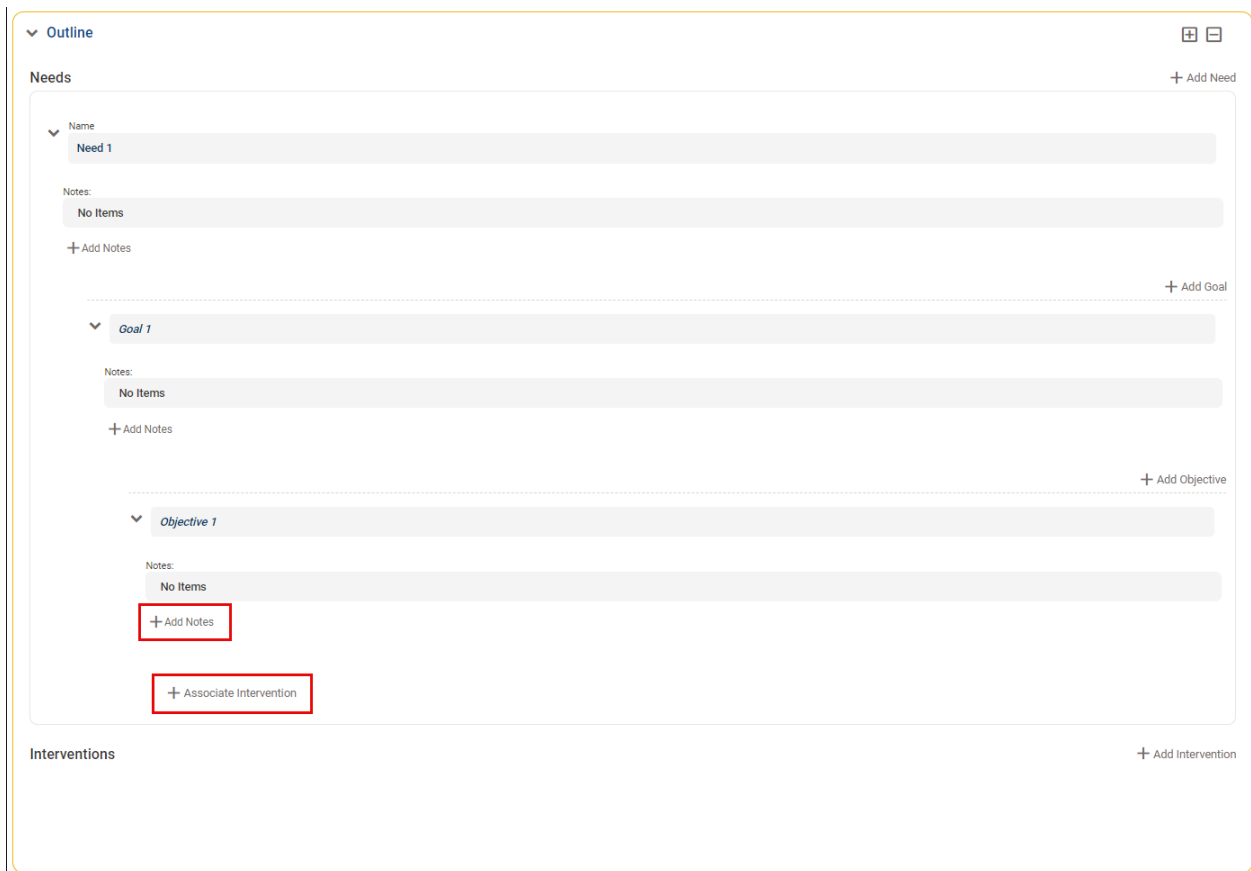
Projected

Is Deferred
 No [v]

Save [X] Cancel

Figure 116: Add Objective

9. Complete fields as necessary or required and click **Save** when finished.
10. The Outline will update and display Notes for the added Objective and the Associate Intervention button.
 - a. For each need created, an intervention will need to be associated.



Outline [X] [Y]

Needs [Add Need]

Need 1

Notes: No Items [Add Notes]

Goal 1

Notes: No Items [Add Notes]

Objective 1

Notes: No Items [Add Notes] [Associate Intervention]

Interventions [Add Intervention]

Figure 117: Outline with Objective Added

11. Click **+Add Intervention** to open the Add Intervention window.

Add Intervention ×

Name

Responsible Party

Type

Program Enrollment

Service Location

Service

Is Deferred

No

Save × Cancel

Figure 118: Add Intervention

12. Complete fields as necessary or required and click **Save** when finished.
13. The Interventions section of the Outline will update.
 - a. If needed, click +Add Responsible Party to add more to this field.
 - b. Notes can also be added to the Intervention as necessary.

Interventions + Add Intervention

Intervention 1

Program Enrollment
Treatment

Service Location
Comprehensive Outpatient Rehab Facility

Service
90832 Individual Counseling

Responsible Party:
Client

+ Add Responsible Party

Planned Date Range
-

Notes:
No Items

+ Add Notes

Figure 119: Outline with Intervention Added

14. Click **+Associate Intervention** in the Need section to be linked.
15. The Associate Intervention window will open.

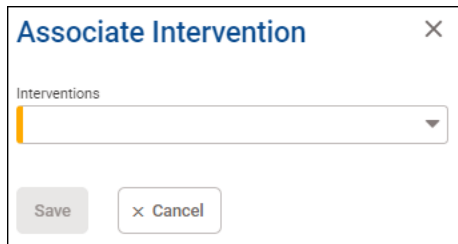


Figure 120: Associate Intervention

16. Select the Intervention to be associated, and then click **Save**.
17. If needed, more than one Intervention can be associated to a Need.
18. The Outline will update to show the associations between the Need and the Intervention.

Outline

Needs

Name

Need 1

Notes:

No Items

+ Add Notes

Goal 1

Notes:

No Items

+ Add Notes

Objective 1

Notes:

No Items

+ Add Notes

Associated Interventions

Intervention 1

+ Associate Intervention

Interventions

Intervention 1

Program Enrollment

Treatment

Service Location

Comprehensive Outpatient Rehab Facility

Service

90832 Individual Counseling

Responsible Party:

Client

+ Add Responsible Party

Planned Date Range

-

Notes:

No Items

+ Add Notes

Associated Objectives

Objective 1

Figure 121: Outline with Associations

4.4.4. Client Participation

This section captures information regarding the client's participation in creating the treatment plan.

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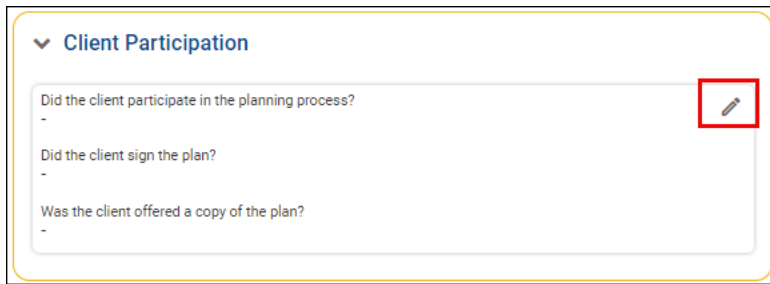


Figure 122: Client Participation

Hover over the questions to make the pencil icon appear. Click the **pencil** icon to open a window with the questions and answer dropdowns. Complete these fields and click **Save** when finished.

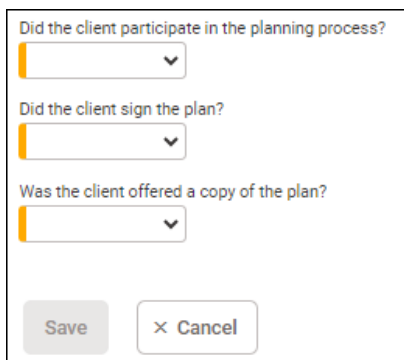


Figure 123: Client Participation Questions

4.4.5. Treatment Team

While not listed as a completion requirement, a treatment team or member must be assigned to the client's treatment plan.

1. Click **Go To Treatment Team**.

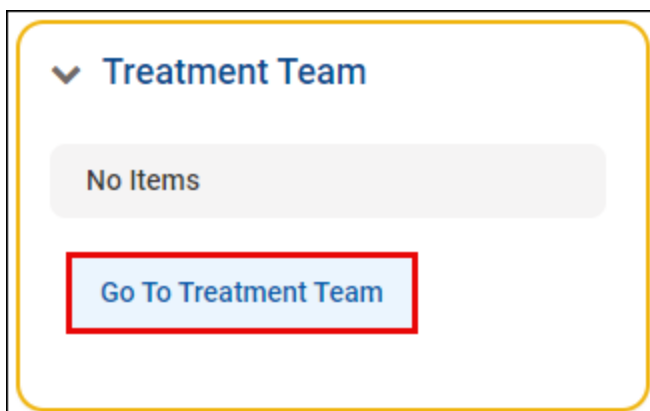


Figure 124: Go To Treatment Team Button

2. The Treatment Team screen will display.

3. To add a treatment team member, click **+Add Team Member**.

Treatment Team

+ Add Team Member

Assign Group

Currently, there are no results to display for Treatment Team.

Profile

Staff Name

Non Staff Name

Add Collateral Contact

Role/Relation

Start Date

End Date

Review Member

Primary Care Staff

Deny Access to Client Records

Treatment Sub-Teams

Recovery

Selected Sub-Teams

Notes

Finish

Figure 125: Treatment Team - Add Team Member

4. The Profile section will become active.
5. Complete all required and relevant fields.
 - a. While not listed as required fields, **Staff Name** or **Non Staff Name** must be chosen from their respective dropdown lists.
 - b. Collateral contacts display in the Non Staff Name dropdown. If a collateral contact needs to be added, click **Add Collateral Contact**.

Treatment Team

[+ Add Team Member](#)
[Assign Group](#)

Currently, there are no results to display for Treatment Team.

Profile

Staff Name

Non Staff Name

[Add Collateral Contact](#)

Role/Relation

Start Date

End Date

Review Member

Primary Care Staff

Deny Access to Client Records

Treatment Sub-Teams

Selected Sub-Teams

Notes

Save

Save and Finish

Cancel

- Click **Save and Finish**.
- The user is returned to the Client Activity List screen.
- To return to the treatment plan, click the **vertical ellipsis** to the right of Treatment Plan Summary, and then click **Review**.

Client Activity List				
Activity	Activity Date	Created Date	Status	
Client Information (Profile)	1/10/2024	1/10/2024	Completed	⋮
Intake Transaction	1/10/2024	1/10/2024	Completed	⋮
Client Program Enrollment (Treatment)	1/10/2024	1/10/2024	Completed	⋮
Encounter Summary	1/10/2024	1/10/2024	Completed	⋮
UNCOPE	1/10/2024	1/10/2024	Completed	⋮
ADMH Placement Assessment	1/10/2024	1/10/2024	Finalized	⋮
Diagnosis Summary	1/10/2024	1/10/2024	Completed	⋮
Treatment Plan Summary	1/10/2024	1/10/2024	Pending	⋮
Outcome Measures - Client Status	1/10/2024	1/10/2024	Completed	⋮

Figure 126: Client Activity List - Treatment Plan

9. Click **View** on the Treatment Plan screen to enter the treatment plan.

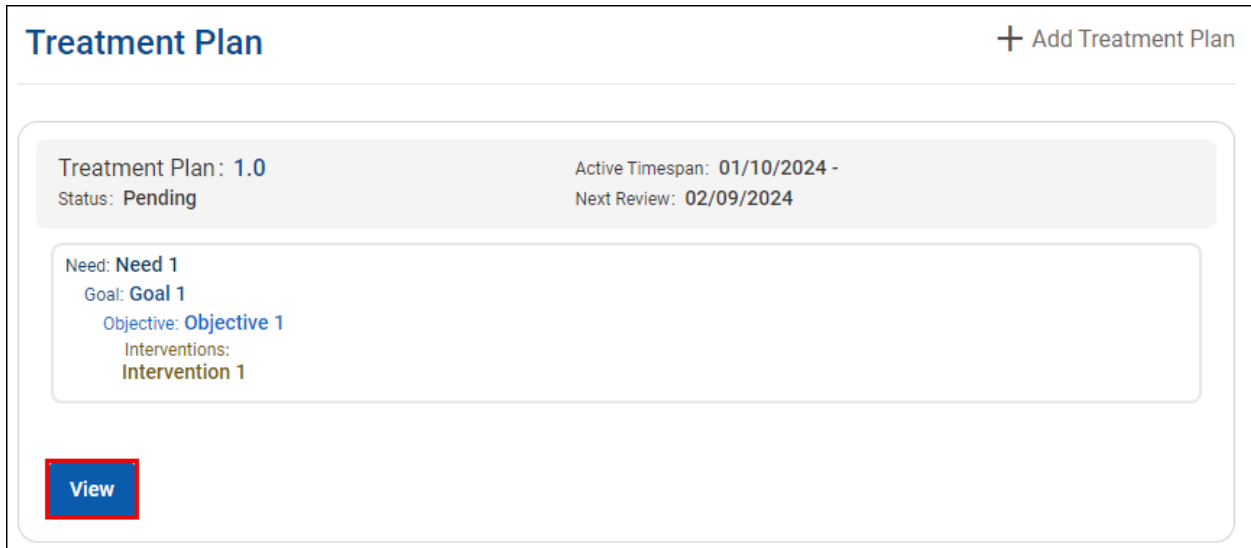


Figure 127: Treatment Plan - View

4.4.6. Sign Off

NOTE: Only individuals assigned to the client's treatment team can sign off on the treatment plan.

Click **Sign and Finalize**.

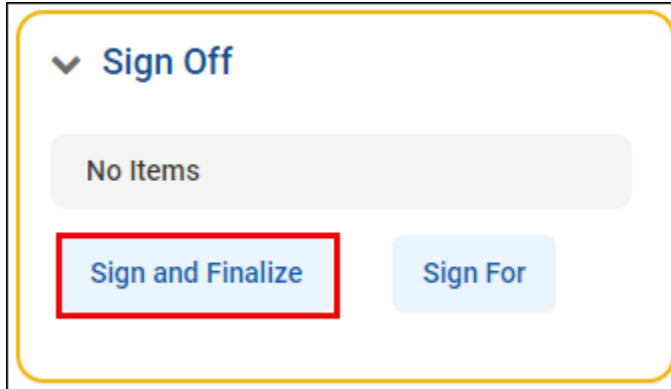


Figure 128: Sign Off

The section will update showing the captured treatment team member's signature. It will also have the status Finalized.

▼ Sign Off

Signature Lead, Treatment	Role Case Manager	Signed 01/18/2024 03:04 PM	Finalized
------------------------------	----------------------	-------------------------------	-----------

Figure 129: Sign Off Finalized

5. OTHER TREATMENT FUNCTIONS

5.1. Drug Testing

The Drug Testing screen can be used to record results. It does not report the data to systems outside of WITS.

NOTE: To use this functionality, the client record must be active.

1. Click the **Activity List** to expand its options.

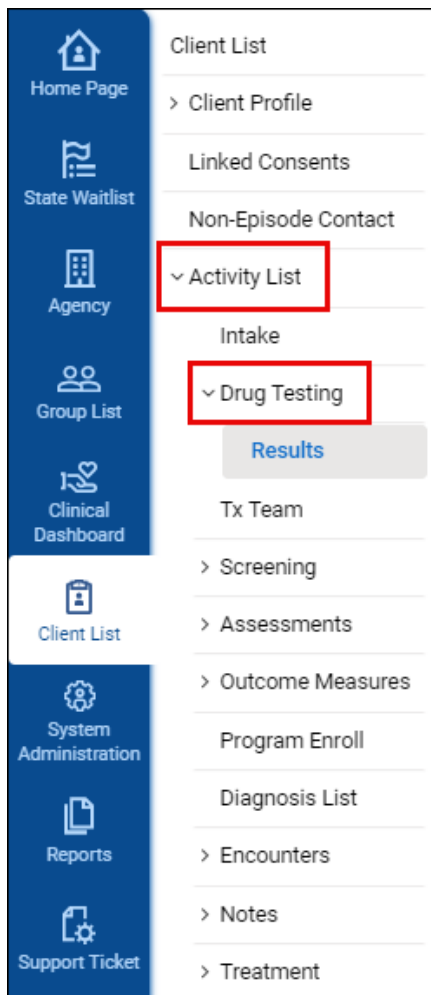


Figure 130: Accessing Drug Testing Results

2. Click **Drug Testing** to display the Drug Test Result Search screen.
 - a. Previous results will display in the Drug Test Result List.
 - b. A search can be performed to narrow results.

Drug Test Result Search

From Date
12/19/2023

To Date
1/18/2024

Finish

Search

× Clear

Drug Test Result List

+ Add Test Result

Export

Total Tests 0

Total Positive Tests (including unconfirmed) 0

Currently, there are no results to display for the Drug Test Result List.

Figure 131: Drug Test Results Search

3. Click **+Add Test Result**.
4. Set the **Client Outcome** field.
 - a. Several fields are read-only until the field Client Outcome is set to a variation of specimen collected.

Drug Test Result Profile

Specimen #

Date

Client Outcome

Specimen Type

Comments

Save

Save and Finish

× Cancel

Staff
Wilson, Scott; Clinician

Facility
Titan Treatment

Location

Blood Alcohol Content

Marijuana Content

Add Drug Test Results

Drug Type
Alcohol
Amphetamines
Barbiturates
Benzodiazepine
Cocaine
Creat
Hallucinogens
Heroin
Inhalants
Marijuana

Test Result

Add

Drug Test Results List

Test Result

Edit Test Result

Currently, there are no results to display for the Drug Test Results List.

Client Outcome must be some variation of Specimen Collected before read only fields become active.

Figure 132: Drug Test Result Profile

5. All fields are now active.
6. Complete all required and relevant fields.
7. Under Add Drug Test Results, multiple results can be recorded.
 - a. Each **Drug Type** will need to be selected along with the **Test Result**.
 - b. Click **Add** to capture the data.
 - c. Drug Test Results List will update with the recorded data.

Drug Test Result Profile

Specimen #

Date

Client Outcome
Specimen Collected

Specimen Type

Comments

Save

Save and Finish

× Cancel

Staff
Wilson, Scott, Clinician

Facility
Titan Treatment

Location

Blood Alcohol Content

Marijuana Content

Add Drug Test Results

Drug Type
Amphetamines
Barbiturates
Benzodiazepine
Cocaine
Creat
Hallucinogens
Heroin
Inhalants
Methadone
Other Opiates

Test Result

Add

Drug Test Results List

Test Result

Edit Test Result

Drug	Test Result	
☐ Alcohol	Negative	⋮
☐ Marijuana	Positive - Confirmed	⋮

Figure 133: Add Drug Test Results

8. Click **Save and Finish** once all information has been recorded.

5.2. Medications

Any medications prescribed to the client are recorded here. This is just for documentation purposes and is not transmitted from or to sources outside of WITS.

NOTE: The client record must be active.

1. Click on the **Activity List** submenu to expand its options.
2. Click **Treatment** to expand its options.
3. Click **Medications**.

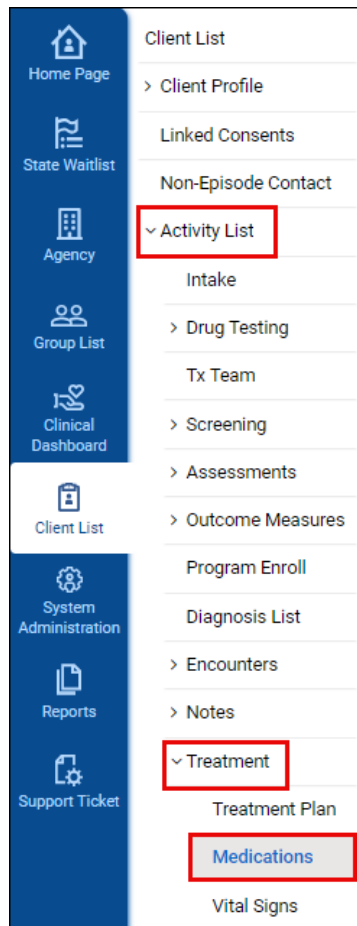


Figure 134: Accessing Medications

4. The Medications screen will display.
 - a. Current Medications will be listed here.
 - b. A search can be performed to narrow the results listed.

Medications

^ Hide Context Information

Current Medications

Prescribed Date Begin

Prescribed Date End

Medication Category

Search

× Clear

Medications List for Reyes, Jaime

+ Add New Medication

Currently, there are no results to display for the Medications List for Reyes, Jaime.

Figure 135: Medications Screen

5. Click **+Add New Medication**.
6. The section below the Medication List will become active.
7. Complete all required and relevant fields.

Medication Category 	Medication
Indication For Use 	
Dose 	Frequency
PRN ☐ Yes ☒ No	Route
Date Prescribed 1/18/2024	Date Discontinued
Staff Prescriber 	Non Staff Prescriber
Pharmacy Used 	Fulfillment Instructions
Number Refills 	Transmitted
Notes (including identification and documentation of drug relations and instructions for use) 	
Save Save and Finish × Cancel	

Figure 136: Add New Medication

8. Click **Save and Finish**.

5.3. Vital Signs

Vital signs are recorded for the client here. This is just for documentation purposes and is not transmitted from or to sources outside of WITS.

NOTE: The client record must be active.

1. Click on the **Activity List** submenu to expand its options.
2. Click **Treatment** to expand its options.
3. Click **Vital Signs**.

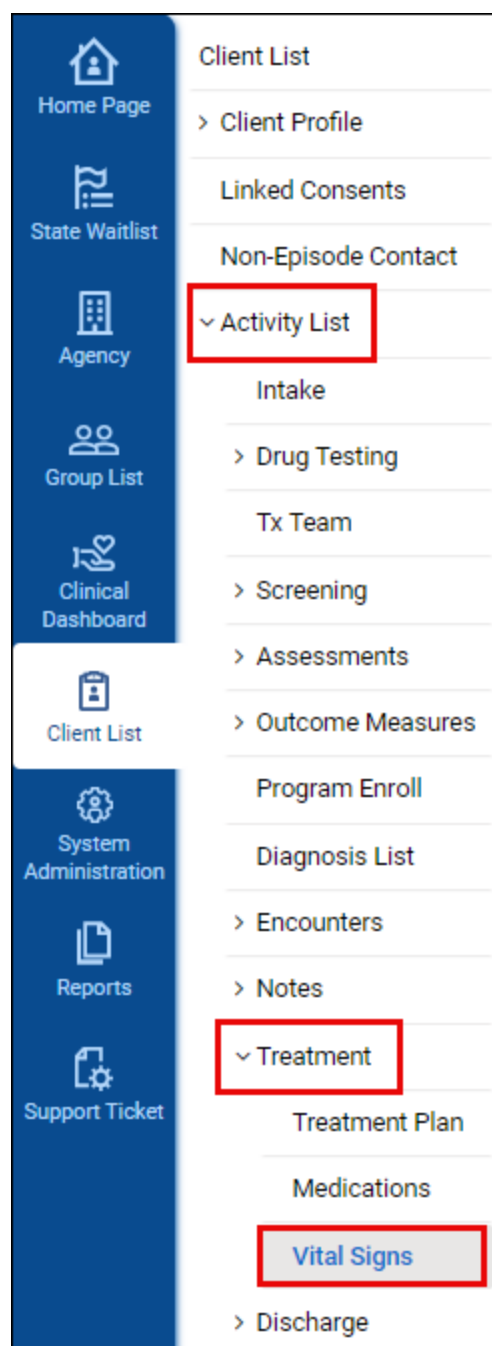


Figure 137: Accessing Vital Signs

4. The Vital Signs Profile screen will display.
 - a. Previous recordings will be listed.
 - b. This information can be exported to an Excel file.

Vital Signs Profile

+ Add New

Export

Currently, there are no results to display for Vital Signs Profile.

Vital Signs Profile

Height

in.

Weight

Lbs.

BMI

[Calculate BMI](#)

BMI Percentile (2-20 years)

%

Pulse

min

Resp

min

O2 Sat

%

Temp

F

Waist Circumference

in.

Blood Pressure (systolic/diastolic)

/

mmHg

Weight-for-length Percentile (Birth – 36 months)

%

Head Occipital-Frontal Circumference Percentile (Birth – 36 months)

%

Date Taken

Time Taken On

Additional comments

Taken by

Created By

Updated By

Finish

Figure 138: Vital Signs Profile

- To record a new set of vitals, click **+Add New**.
- The screen fields will become editable.
- Complete all required and relevant fields.

Vital Signs Profile

Height In.	Weight Lbs.	BMI Calculate BMI
BMI Percentile (2-20 years) %	Pulse min	Resp min
O2 Sat %	Temp F	Waist Circumference in.
Blood Pressure (systolic/diastolic) / mmHg	Weight-for-length Percentile (Birth – 36 months) %	Head Occipital-Frontal Circumference Percentile (Birth – 36 months) %
Date Taken 1/19/2024 	Time Taken On 8:47 AM	Additional comments
Taken by Wilson, Scott ▼		
Created By 		Updated By
Save Save and Finish × Cancel		

Figure 139: Add Vital Signs

8. Click **Save** to finish creating the record.

5.4. Notes

While most interactions with a client will be logged as encounters, the user also has the option to add a miscellaneous note to the client record. These are a good way to document any non-billable activity that is important.

NOTE: To add a note to a client's record, the client must be active for the user.

1. From the **Activity List** submenu, click **Notes**.

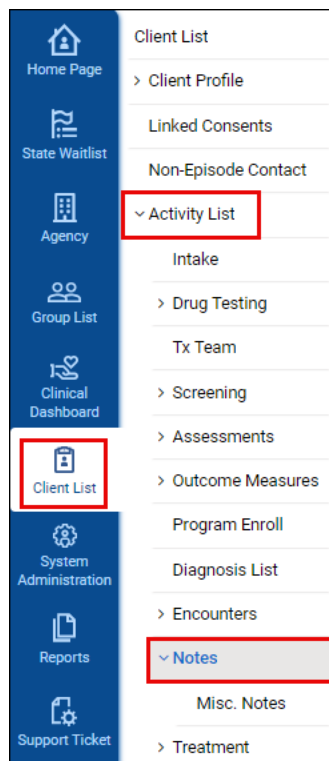


Figure 140: Accessing Notes

2. The Notes Search screen will display.
 - a. Searches performed will display results in the Note List section.
 - b. Miscellaneous and encounter notes will display here.

Notes Search

Start Date

1/11/2023

End Date

1/11/2024

Allow Disclosure of Note

☐ Yes
 ☐ No

Search

× Clear

Note List

+ Add New Misc. Note

+ Add New Encounter Note

Print Notes

Currently, there are no results to display for the Note List.

Figure 141: Add Misc Note

3. Click **+Add New Misc. Note**.
4. The Miscellaneous Notes screen displays.
5. Complete all required and relevant fields.

Miscellaneous Notes

[Hide Context Information](#)

Author Name	Author Title	Created Date
Wilson, Scott		

Note Type: Service Date: 1/11/2024 Duration:

Program: Start Time: End Time:

Alert: ☐ Yes ☒ No [Mark Alert](#) Frequency: Was Report Sent to State: ☐ Yes ☐ No

Summary:

Unsigned Notes

Allow Disclosure: ☐ Yes ☒ No

Signed Notes

Figure 142: Miscellaneous Notes

6. Click **Save and Finish**.

There are some fields that require further explanation.

- **Mark Alert/Remove Alert** – When selected, this will flag the client record and highlight it in red. Anyone that accesses Notes or looks at the client’s record in the Client List will see a bell icon and the red highlight.

1 Rows in RED represent clients who currently have active alert notes.

Client Search

Facility First Name Last Name Unique Client Number

Search **Advanced Search** **Clear**

Client List

+ Add Client **Export**

Full Name	Unique Client #	SSN
KD DANVERS, Kara 9/27/1976 Female	J313033EH331564	999-99-9999
JR REYES, Jaime 2/1/2006 Male	Q654030IV034644	988-77-9966

Figure 143: Client - Mark Alert

- **Sign Note** – Any note added to the Unsigned Notes text box will be added to the Signed Notes box when this button is clicked.
- **Allow Disclosure** – This will make the note available to consented agencies if Yes is selected.
- **Add Note** – This will open the Append Miscellaneous Notes screen. Enter notes, and then click Finish. These are then added to the Unsigned Notes text box.

Append Miscellaneous Notes

Append Notes

Cancel **Finish**

Figure 144: Append Miscellaneous Notes

Notes cannot be deleted once created. They can only be appended. This is done by clicking the **vertical ellipsis** to the right of the note, and then clicking **Review**.

Miscellaneous Notes Search

Start Date

End Date

Allow Disclosure of Note
☐ Yes ☐ No

Miscellaneous Notes List

+ Add New Miscellaneous Notes Record

Service Date ▾	Author ▾	Note Type ▾	Summary ▾	
1/11/2024	Wilson, Scott	Note to file	Text	Review ⋮

Figure 145: Edit Note

5.5. Clinical Dashboard

The Clinical Dashboard lists a user's clients with open cases. Supervisors can also use this to track their team's workload.

- From the left navigation menu, click **Clinical Dashboard**.

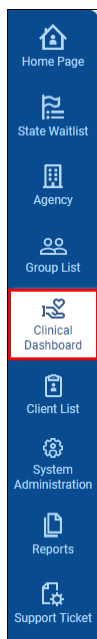


Figure 146: Accessing Clinical Dashboard

- The Clinical Dashboard screen will display.
 - Perform a search as needed to filter results on this screen.
 - Search results display in the Clinical Dashboard List section.

Clinical Dashboard Search

Intake Date Range From To
Case Status

Clients with Open Cases

Modality

Available Staff
Lead, Treatment

Selected Staff
Wilson, Scott

Display Results For
Primary Staff

Search
Clear

Administrative Actions
View Feedback Summary

Clinical Dashboard List

Intake date	Client Name	ASI Date	Admission Date	Treatment Plan	Tx plan review due	Modality	Last Encounter Date	Discharge date	Case Closed	Primary Staff	
1/10/2024	Danvers, Kara		1/10/2024			Ambulatory-Intensive-Outpatient,	1/10/2024			Wilson, Scott	

Figure 147: Clinical Dashboard

- Fields in the Clinical Dashboard List are clickable and will navigate the user to the relevant screens.
- Notes can be accessed by clicking the **vertical ellipsis** and then **Notes**.

Intake date	Client Name	ASI Date	Admission Date	Treatment Plan	Tx plan review due	Modality	Last Encounter Date	Discharge date	Case Closed	Primary Staff	
1/10/2024	Reyes, Jaime		1/10/2024	1/11/2024	2/10/2024	Ambulatory-Intensive-Outpatient,				Lead, Treat	Notes
1/10/2024	Danvers, Kara		1/10/2024			Ambulatory-Intensive-Outpatient,	1/10/2024			Wilson, Scott	

Figure 148: Clinical Dashboard List

5.6. Group List

This module allows the provider to create groups for treatment sessions. This is usually for group counseling sessions. This module also allows for the tracking of attendance as well as creating an encounter for clients attending the scheduled session.

Before a group can be created, group types must be setup.

5.6.1. Group Type

To create a group type:

- From the left navigation menu, click **Group List**.

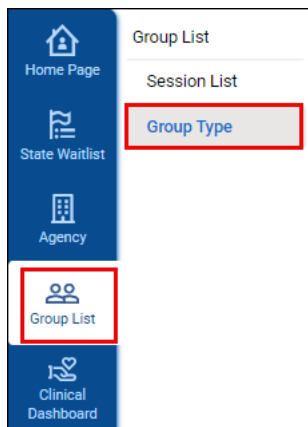
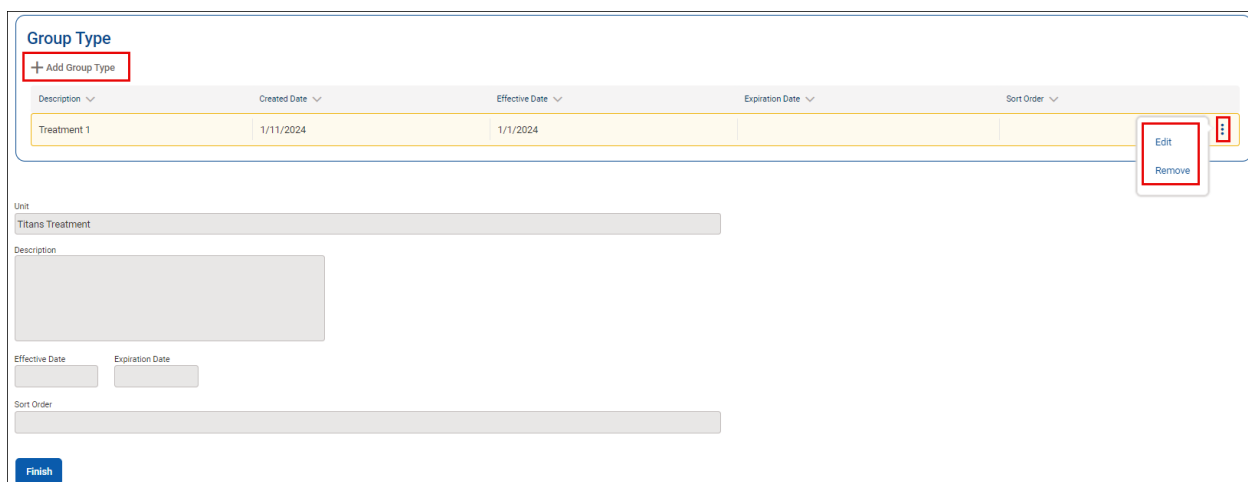


Figure 149: Accessing Group Type

2. Click **Group Type**.
3. The Group Type screen will display. Any existing group types will be listed.
 - a. To **Edit** or **Remove** a group type, hover over the **vertical ellipsis**, and then click the desired action.



Description	Created Date	Effective Date	Expiration Date	Sort Order
Treatment 1	1/11/2024	1/1/2024		

Unit: Titans Treatment

Description:

Effective Date: Expiration Date:

Sort Order:

Finish

Figure 150: Group Type Actions

4. Click **+Add Group Type**.
5. The section below Group Type will become editable.
6. Complete the required and relevant fields.
 - a. Unit – This field is always prepopulated based on the facility name.
 - b. Description – A name or description for the group type being created.
 - c. Effective Date – If the group is only in effect during a certain date range, set that here.
 - d. Sort Order – If some group types should display in lists higher than other types, then assign them numbers. Lower numbers will show at the top of lists.



Figure 151: Group Type Fields

7. Click **Save and Finish**.

5.6.2. Create Group

Once the group types have been created, a treatment group can be setup and clients added to the roster.

1. From the left navigation menu, click **Group List**.

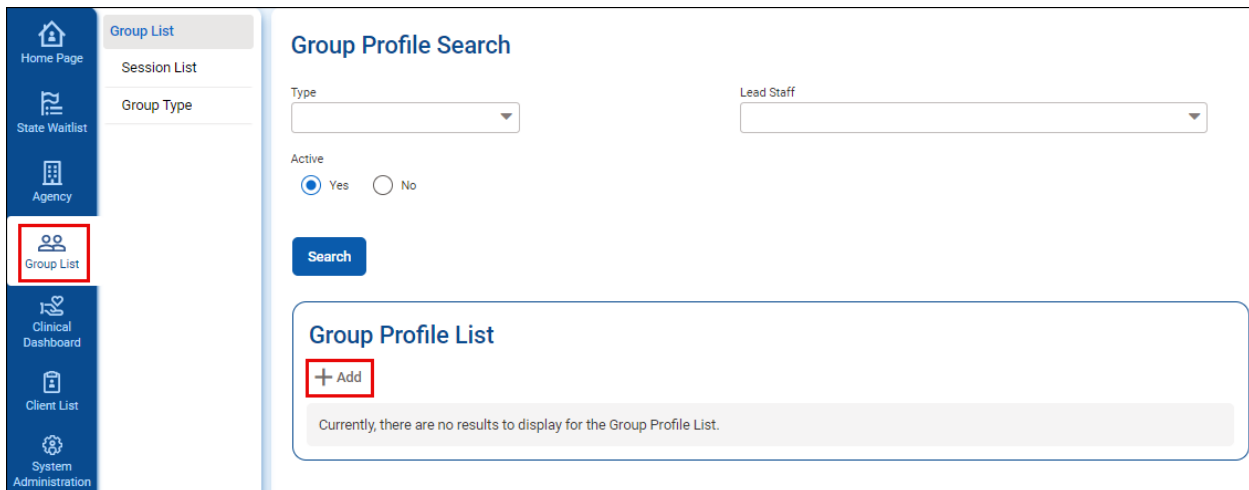


Figure 152: Accessing Group List

2. The Group Profile Search screen will display.
 - a. Existing groups will be listed in the Group Profile List section.
 - b. This list can be narrowed using the search functions.
3. Click **+Add**.
4. The Group Profile screen displays.

5. Complete all required and relevant fields.
 - a. The information captured here relates to when and where the sessions are held and who will conduct them.
 - b. The Roster List actions will not be available until the Group Profile is completed and saved.

Group Profile

Group Name

Group Type

Start Date

End Date

Day of Week

Time of Day

Lead Staff

Room Location

Facility

Titan Treatment

Co-Lead Staff

Selected Co-Lead Staff

Description

Save

Save and Finish

× Cancel

Administrative Actions

Create Group Session

Roster List

Show All Clients

Edit Roster

Currently, there are no results to display for the Roster List.

Figure 153: Group Profile

6. Click **Save**.
7. Click **Edit Roster**.
8. The Roster screen displays.
9. Click **+Add Member**.

Roster

+ Add Member

Currently, there are no results to display for Roster.

Member Profile

Client Name

Program

of Sessions Approved

Status

of Sessions Attended

Status Effective Date

Client Due

Reason

Finish

Figure 154: Roster Screen

10. The Member Profile becomes active.
11. Complete all required and relevant fields.

Roster

+ Add Member

Currently, there are no results to display for Roster.

Member Profile

Client Name

Danvers, Kara (9/27/1976)

Program

Titans Treatment/Treatment : 1/10/2024 -

of Sessions Approved

Status

of Sessions Attended

20

Active

Status Effective Date

Client Due

Reason

1/18/2024

Save

Save and Finish

× Cancel

Figure 155: Member Profile

12. Click **Save**.
13. The client is added to the Roster section and the Member Profile will become read-only again.
14. Repeats steps to add clients to the roster.

Roster

+ Add Member

Client Name	Program	# of Approved Session	# of Sessions Attended	Status	Status Effective Date
Danvers, Kara	Titans Trtmt/Treatment: 1/10/2024 -	20	0	Active	1/18/2024

Member Profile

Client Name

Program

of Sessions Approved Status # of Sessions Attended

Status Effective Date Client Due Reason

Finish

Figure 156: Client Added to Roster

15. Click **Finish** once all participating clients are added to the roster.

16. The user will be returned to the Group Profile screen.

17. Click **Save and Finish**.

Once a Group Profile has been created, several functions become available to aid in management and scheduling.

From the Group Profile Search screen, click the vertical ellipsis to the right of the group profile.

- Review – This option will take the user into the Group Profile record.
- Delete – If the group is no longer needed, select this to delete it.
- Session List – Selecting this will take the user to the Group Session Search screen for the management of group sessions.
- Group Roster – This option accesses the roster for the group to allow for roster management.

Home Page

State Waitlist

Agency

Group List

Clinical Dashboard

Client List

System Administration

Reports

Group List

Session List

Group Type

Group Profile Search

Type Lead Staff

Active
☒ Yes ☐ No

Search

Group Profile List

+ Add

Showing 1 - 1 of 1

Group Name	Group Type	Lead Staff	Day of Week	Time of Day	Start Date	End Date
Treatment	Treatment 1	Lead, Treatment		6:00 PM	1/1/2024	

Review

Delete

Session List

Group Roster

Figure 157: Group Profile Options

Administrative actions also become available to the user once a group profile is created. These are accessed by clicking **Review** for a Group Profile.

- Create Group Session – This action will take the user to the Group Session Notes screen. See [Create Group Session](#) for more information.
- Print Sign-In Sheet – Click this to create a sign-in sheet in a PDF format.

Group Profile

Group Name

Treatment

Group Type

Treatment 1

Start Date

1/1/2024

End Date

Day of Week

Time of Day

6:00 PM

Lead Staff

Lead, Treatment

Room Location

Room A

Facility

Titans Treatment

Co-Lead Staff

Selected Co-Lead Staff

Lead, Treatment

Description

Text

Domains

Selected Domains

Treatment

Save

Save and Finish

× Cancel

Administrative Actions

Create Group Session

Print Sign-In Sheet

Figure 158: Group Profile Admin Actions

5.6.3. Create Group Session

Sessions are created from within the Group Profile screen.

1. Click **Create Group Session** under the Administrative Actions.
2. The Group Session Notes screen will display.
3. Complete all required and relevant fields.

Group Session Notes

^ Hide Context Information

Group Name
Treatment

Group Type
Treatment 1

Note Type
▼

Billable
☐ Yes ☐ No

Start Date
▼

End Date
▼

Start Time
6:00 PM

End Time
▼

Duration
▼

of Service Units/Sessions
▼

Lead Staff
▼

Location
▼

Service
▼

Co-Lead Staff
Lead, Treatment

Selected Co-Lead Staff

↔

Note

Save

Save and Finish

× Cancel

Attendees

+ Add Attendee

Mark as Present

Mark as No Show

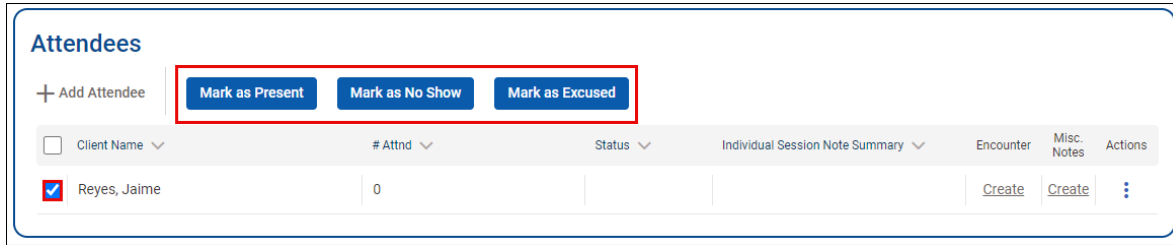
Mark as Excused

☐ Client Name ▼	# Attnd ▼	Status ▼	Individual Session Note Summary ▼	Encounter	Misc. Notes	Actions
☐ Danvers, Kara	0					⋮

Figure 159: Group Session Notes

4. Click **Save**.
5. Scroll to the Attendees section.
6. If needed, click **+Add Attendee** to add more clients to the roster.
7. Check the box to the left of the client's name.
8. Once checked, the user can click one of three buttons for capturing attendance.
 - a. Mark as Present – Selected if the client attended the session.

- b. Mark as No Show – Selected if the client did not attend the session.
- c. Mark as Excused – Selected if the client was unable to attend the session and received an exception.



Attendees

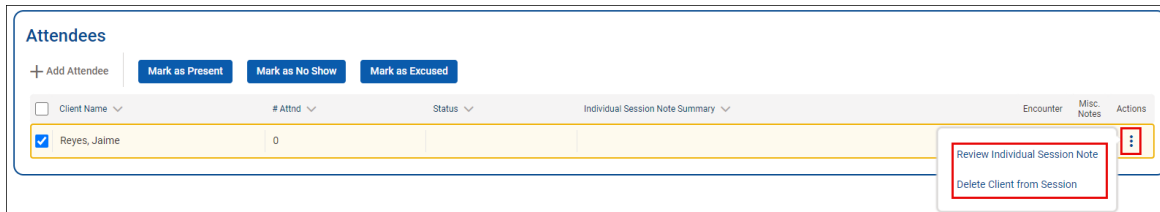
+ Add Attendee

Mark as Present Mark as No Show Mark as Excused

☐ Client Name	# Attnd	Status	Individual Session Note Summary	Encounter	Misc. Notes	Actions
☒ Reyes, Jaime	0			Create	Create	

Figure 160: Capturing Attendance

9. Other actions can also be performed by clicking the vertical ellipsis under the Action column to the far right of the client's name.



Attendees

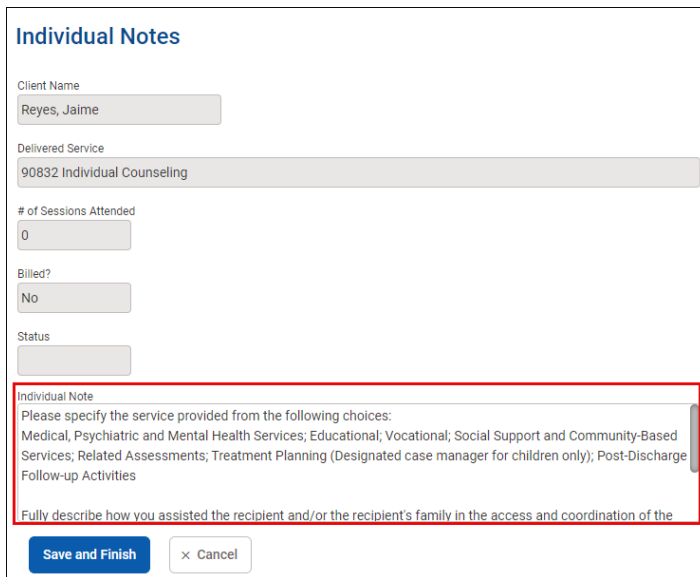
+ Add Attendee

Mark as Present Mark as No Show Mark as Excused

☐ Client Name	# Attnd	Status	Individual Session Note Summary	Encounter	Misc. Notes	Actions
☒ Reyes, Jaime	0					Review Individual Session Note Delete Client from Session

Figure 161: Attendees Actions

10. Review Individual Session Note will open the Individual Notes screen and allow the user to record notes specific to the client.
 - a. **NOTE:** If templates have been setup by the agency administrator, the Individual Note comment box will prepopulate to guide the user in capturing their notes.



Individual Notes

Client Name
Reyes, Jaime

Delivered Service
90832 Individual Counseling

of Sessions Attended
0

Billed?
No

Status
[Empty]

Individual Note
Please specify the service provided from the following choices:
Medical, Psychiatric and Mental Health Services; Educational; Vocational; Social Support and Community-Based Services; Related Assessments; Treatment Planning (Designated case manager for children only); Post-Discharge Follow-up Activities
Fully describe how you assisted the recipient and/or the recipient's family in the access and coordination of the

Save and Finish × Cancel

Figure 162: Individual Notes

11. If the client is no longer attending the sessions, click **Delete Client from Session**.
 - a. The user will need to verify their action to remove the client.

Are you sure that you want to delete?

Yes

× No

Figure 163: Verify Client Removal

12. To add a Miscellaneous Note to the client's record, click **Create** under the Misc. Notes column.

Attendees

+ Add Attendee
Mark as Present
Mark as No Show
Mark as Excused

Client Name	# Attd	Status	Individual Session Note Summary	Encounter	Misc. Notes	Actions
☐ Reyes, Jaime	0			Create	Create	⋮

Figure 164: Create Misc Note

13. To create an encounter for billing purposes, click **Create** under the Encounter column.

Attendees

+ Add Attendee
Mark as Present
Mark as No Show
Mark as Excused

Client Name	# Attd	Status	Individual Session Note Summary	Encounter	Misc. Notes	Actions
☐ Reyes, Jaime	0			Create	Create	⋮

Figure 165: Create Encounter

5.6.4. Session List

This screen allows the user to view recorded sessions and print group notes.

NOTE: While there is an +Add button, it is not recommended that group sessions are recorded from this screen.

To access the Group Session screen:

1. From the left navigation menu, click **Group List**.
2. Click **Session List**.

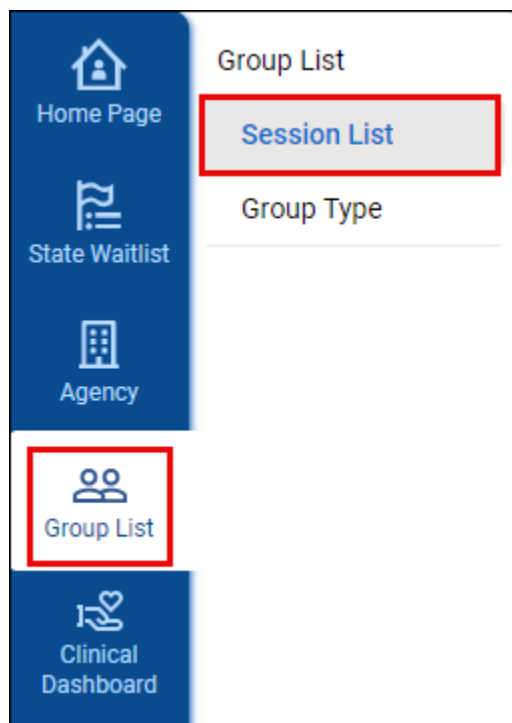


Figure 166: Accessing Session List

3. The Group Session Search screen will display.
 - a. Existing sessions will be listed under Group Session List.
 - b. The results can be filtered using the search option.

Group Session Search

Start Date: 10/19/2023 End Date: 1/19/2024

Search

Group Session List

+ Add **Print Group Notes**

Showing 1 - 1 of 1

Group Name	Rendering Staff	Date	Service Code	Service Description	Start Time	End Time
Treatment	Lead, Treatment	1/15/2024	90832	90832 Individual Counseling	6:00 PM	

Figure 167: Group Session Screen

4. To print the group notes, click **Print Group Notes**.

Enter range of dates for notes

Date Range

From To

Figure 168: Print Group Notes

5. Enter a date range and then click **Go**.
6. The Group Session Notes Report screen displays.
7. Group Sessions that fall within the date range will be listed.
 - a. If needed, the results can be further filtered using **Search**.

Group Session Notes Report

Group Session Notes Report List

Group Profile Name	Date	Rendering Staff	Type	Note
Treatment 2	1/18/2024	Lead, Treatment	Case Management Note	

Figure 169: Group Session Notes Report

8. Click **Export** to save the file in an Excel format.

Appendix A: Acronyms

Table 4: Acronyms

Acronym	Literal Translation
ADMH	Alabama Department of Mental Health
AOD	Alcohol or Drugs
AS AIS	Alabama Substance Abuse Information System
ASAM	American Society of Addiction Medicine
CGE	Client Group Enrollment
EHR	Electronic Health Record
NOMs	National Outcome Measures
SUD	Substance Use Disorder
TEDS	Treatment Episode Data Set
TPL	Third Party Liability
TX	Treatment
UCN	Unique Client Number
WITS	Web Infrastructure for Treatment Services

Appendix B: Glossary

Table 5: Glossary

Term	Definition
Agency	The legal entity that a provider operates within; Some people refer to this as 'Provider'.
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.