

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 |
| | | | |
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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.

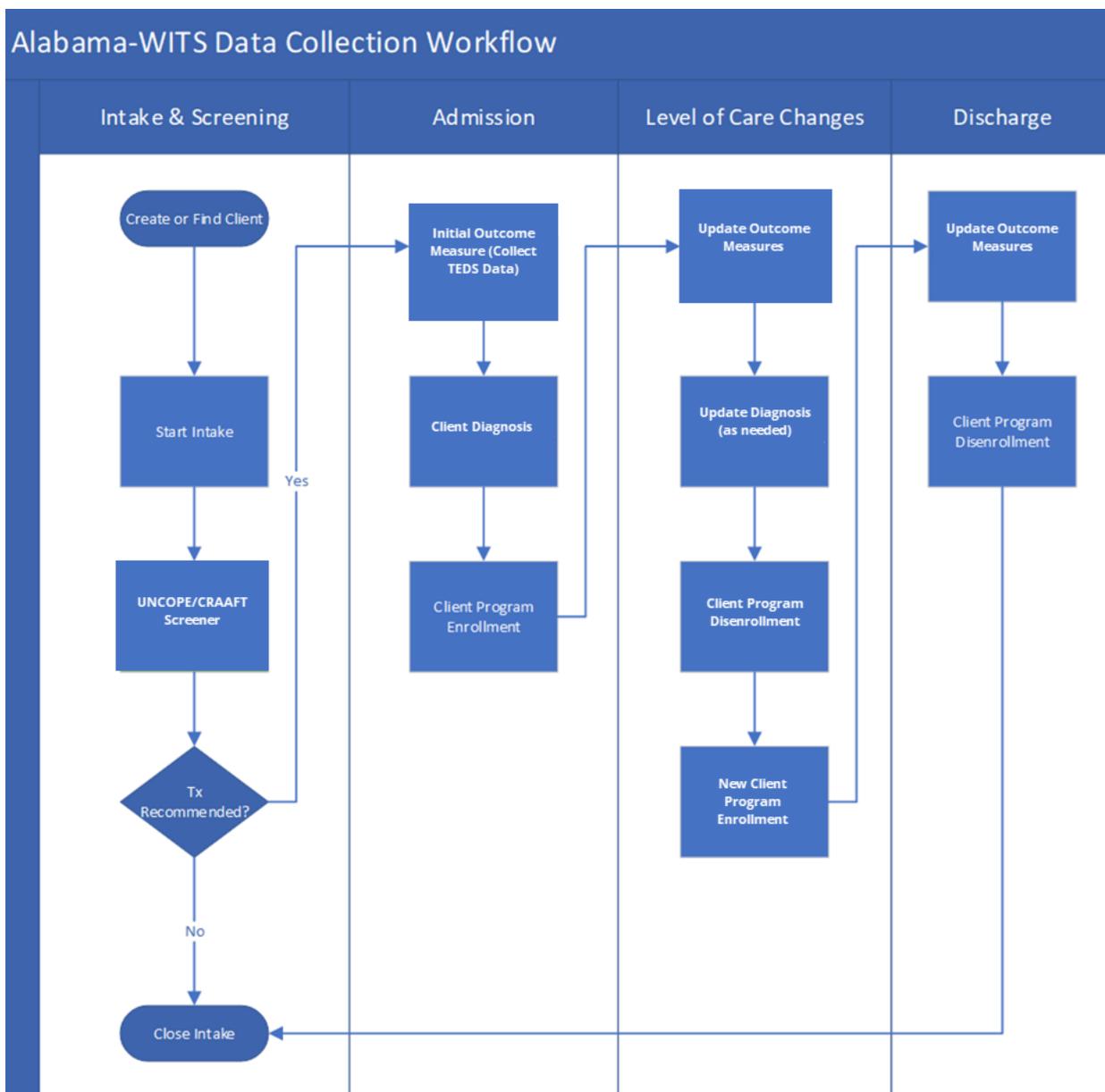


Figure 1: Treatment Workflow

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.



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.



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:

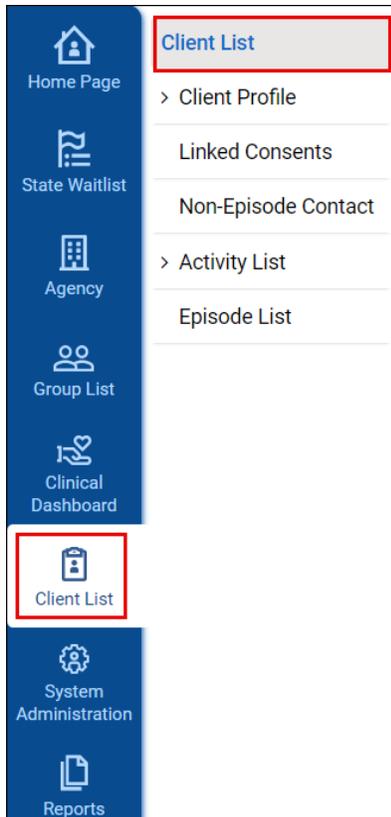


Figure 4: Accessing Client Records

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.

No results match your search criteria. ✕

Client Search

Facility First Name Last Name Unique Client Number

Client List

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

Clients with Consents from Outside Agencies

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: Middle Name: Last Name:

Mother's Maiden Name: Suffix: Sex at Birth:

Gender Identity: DOB: SSN:

Provider Client ID: Driver's License: Has paper file: Yes No

Upload Profile Image

No File Selected...

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**.

i 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 | <input type="button" value="Select"/> <input type="button" value="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 | | | ⋮ |

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

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

Client Search

Facility First Name Last Name Unique Client Number

Client List

+ Add Client Export

| Full Name | Unique Client # | SSN | |
|---|-----------------|---------|---|
| <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">JR</div> <div> <p>REYES, Jaime</p> <p>2/1/2006 Male</p> </div> </div> | 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.

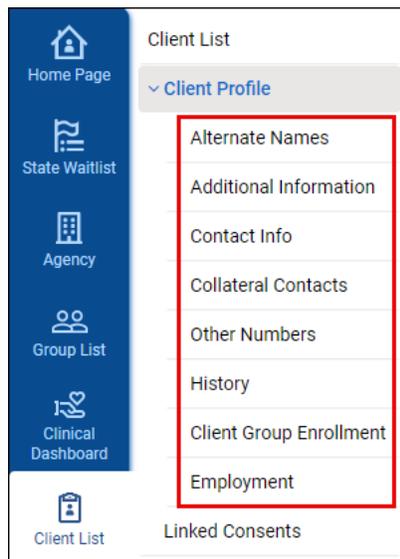


Figure 11: Client Profile Submenu Actions

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.

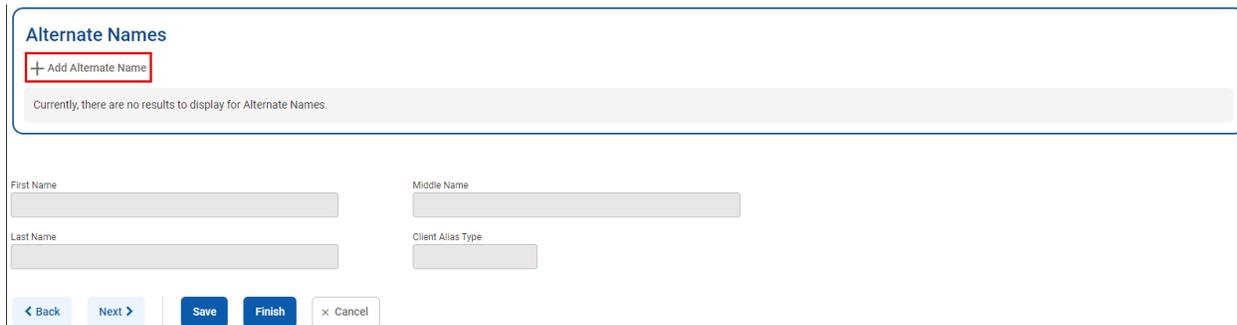


Figure 12: Alternate Names

- 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

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

Special Needs

Veteran Status

Sexual Orientation

English Fluency

Hearing Status

General Client Comments

Selected Races

Selected Special Needs

Citizenship

Religious Preference

Language Preference

Interpreter Needed

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 | ⋮ |

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.

| | |
|---|---|
| <input type="text" value="First Name"/> | <input type="text" value="Address 1"/> |
| <input type="text" value="Last Name"/> | <input type="text" value="Address 2"/> |
| <input type="text" value="Relation"/> | <input type="text" value="City"/> <input type="text" value="State"/> <input type="text" value="Zip"/> |
| <input type="text" value="Custodian"/> | <input type="text" value="Email"/> |
| <input type="text" value="Gender"/> | <input type="text" value="Can Contact"/> |
| <input type="text" value="Date of Birth"/> | <input type="text" value="Consent On File"/> |
| <input type="text" value="SSN"/> | <input type="text" value="Expiration Date of Consent"/> |
| <input type="text" value="Home Phone"/> | <input style="width: 100%; height: 60px;" type="text" value="Notes"/> |
| <input type="text" value="Work Phone"/> | |
| <input type="text" value="Mobile"/> | |
| <input type="text" value="Fax"/> | |
| <input type="text" value="Other"/> | |
| <input type="text" value="Legal Guardian"/> | <input type="text" value="Created"/> |
| <input type="text" value="Gives Permission To Treat?"/> | <input type="text" value="Last Update"/> |
| <input type="text" value="Permission To Treat Type"/> | |
| <input type="text" value="Active Date"/> | |
| <input type="text" value="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.

| | |
|--|--|
| <p>First Name <input style="width: 95%;" type="text"/></p> <p>Last Name <input style="width: 95%;" type="text"/></p> <p>Relation <input style="width: 95%;" type="text"/></p> <p>Custodian <input type="radio"/> Yes <input type="radio"/> No</p> <p>Gender <input style="width: 95%;" type="text"/></p> <p>Date of Birth <input style="width: 95%;" type="text"/></p> <p>SSN <input style="width: 95%;" type="text"/></p> <p>Home Phone <input style="width: 95%;" type="text"/></p> <p>Work Phone <input style="width: 95%;" type="text"/></p> <p>Mobile <input style="width: 95%;" type="text"/></p> <p>Fax <input style="width: 95%;" type="text"/></p> <p>Other <input style="width: 95%;" type="text"/></p> <p>Legal Guardian <input type="radio"/> Yes <input type="radio"/> No</p> <p>Gives Permission To Treat? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Permission To Treat Type <input style="width: 95%;" type="text"/></p> <p>Active Date <input style="width: 95%;" type="text"/></p> <p>Inactive Date <input style="width: 95%;" type="text"/></p> | <p>Address 1 <input style="width: 95%;" type="text"/></p> <p>Address 2 <input style="width: 95%;" type="text"/></p> <p>City <input style="width: 30%;" type="text"/> State <input style="width: 30%;" type="text"/> Zip <input style="width: 30%;" type="text"/></p> <p>Email <input style="width: 95%;" type="text"/></p> <p>Can Contact <input type="radio"/> Yes <input type="radio"/> No</p> <p>Consent On File <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Expiration Date of Consent <input style="width: 95%;" type="text"/></p> <p>Notes <input style="width: 95%; height: 50px;" type="text"/></p> <p>Created <input style="width: 95%; background-color: #f0f0f0;" type="text"/></p> <p>Last Update <input style="width: 95%; background-color: #f0f0f0;" type="text"/></p> |
|--|--|

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.

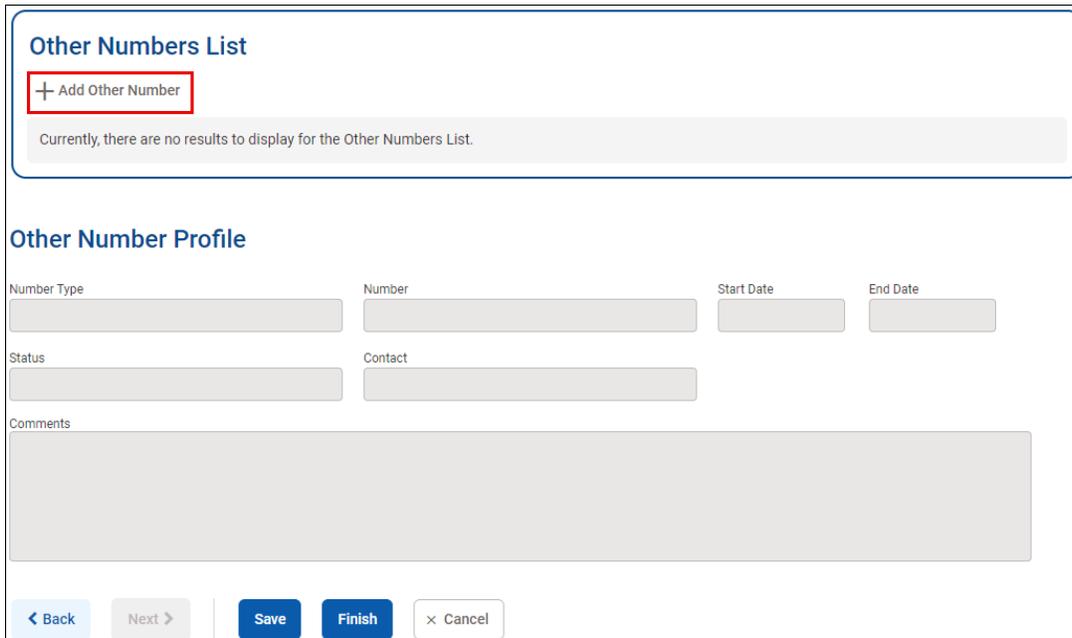


Figure 18: Other Numbers

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

End Date

Status

Contact

Comments

Save and Finish
x 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: Q654044IV46464' |
| 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.

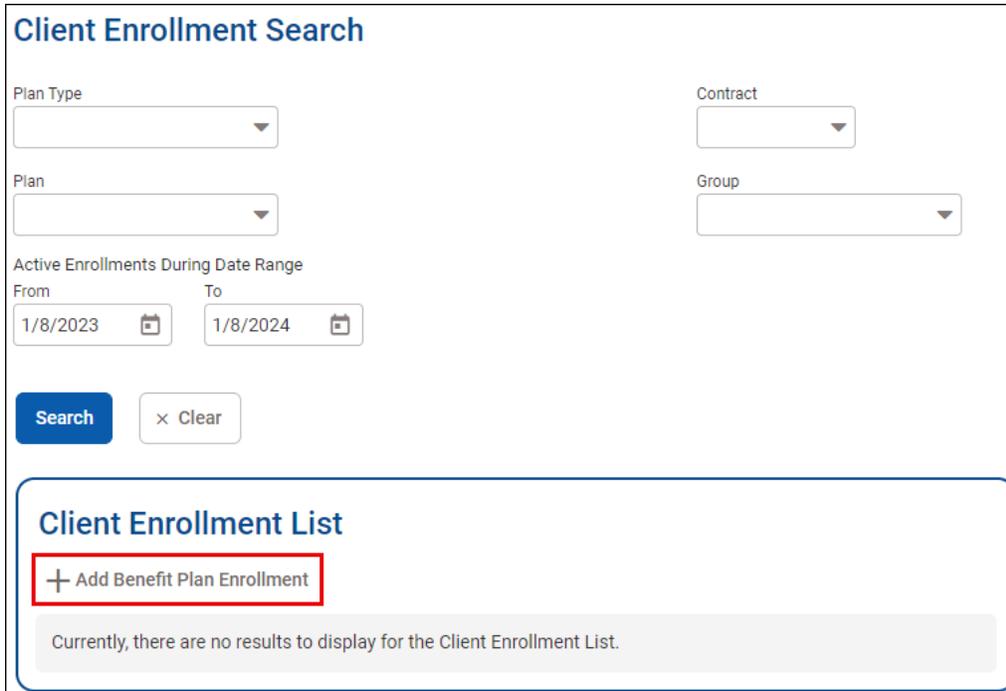
Only Third Party Liability (TPL) information will need to be manually added to a client's record.

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:



The screenshot shows a web interface for managing client enrollments. At the top is the "Client Enrollment Search" section, which includes four dropdown menus: "Plan Type", "Contract", "Plan", and "Group". Below these is a date range selector for "Active Enrollments During Date Range" with "From" and "To" fields, both containing the date "1/8/2023" and "1/8/2024" respectively. There are "Search" and "x Clear" buttons. Below the search section is the "Client Enrollment List" section, which features a red-bordered button labeled "+ Add Benefit Plan Enrollment". Below this button is a grey message box stating "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 Policy #
 Coverage Start End Payment Scale
 Eligibility Category Relationship to Subscriber/Responsible Party

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:

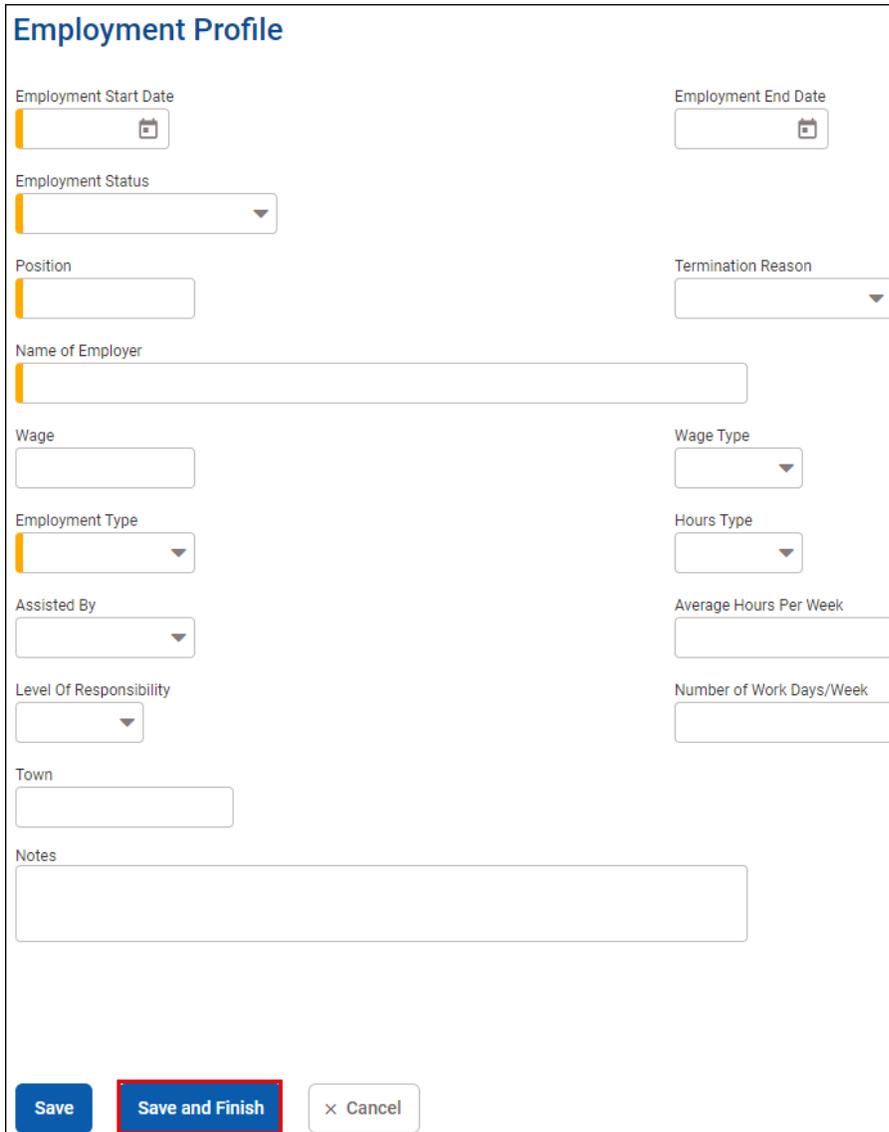
Employment History

+ 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.



The screenshot shows the 'Employment Profile' form with the following fields and controls:

- Employment Start Date:** Date picker field.
- Employment End Date:** Date picker field.
- Employment Status:** Dropdown menu.
- Position:** Text input field.
- Termination Reason:** Dropdown menu.
- Name of Employer:** Long text input field.
- Wage:** Text input field.
- Wage Type:** Dropdown menu.
- Employment Type:** Dropdown menu.
- Hours Type:** Dropdown menu.
- Assisted By:** Dropdown menu.
- Average Hours Per Week:** Text input field.
- Level Of Responsibility:** Dropdown menu.
- Number of Work Days/Week:** Text input field.
- Town:** Text input field.
- Notes:** Large text area.

At the bottom, there are three buttons: **Save** (blue), **Save and Finish** (red, highlighted with a red box), and **× Cancel** (white).

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**.

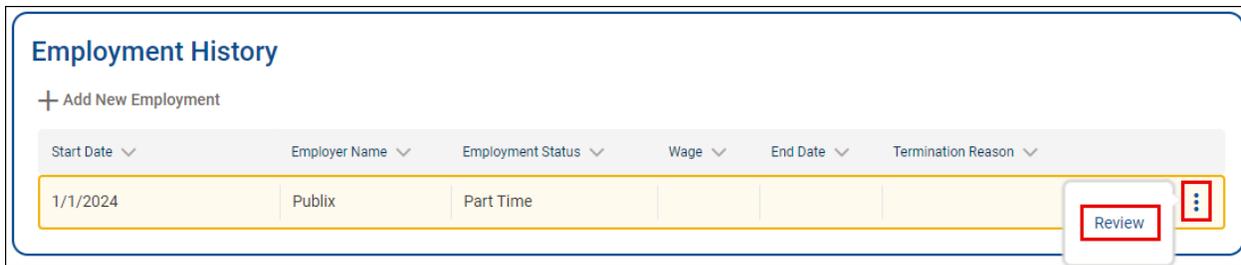


Figure 25: Edit Employment History

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.

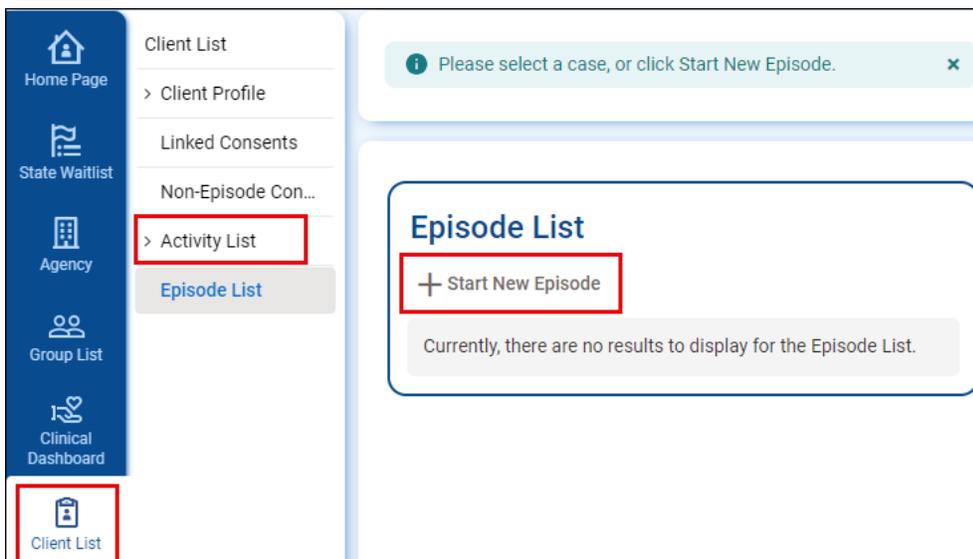


Figure 27: Create Intake

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
[Calendar Icon]

Intake Date
1/8/2024 [Calendar Icon]

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

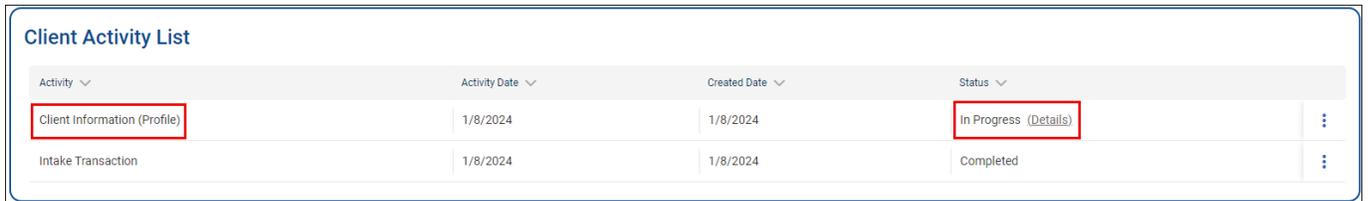
Treatment

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.



| 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.

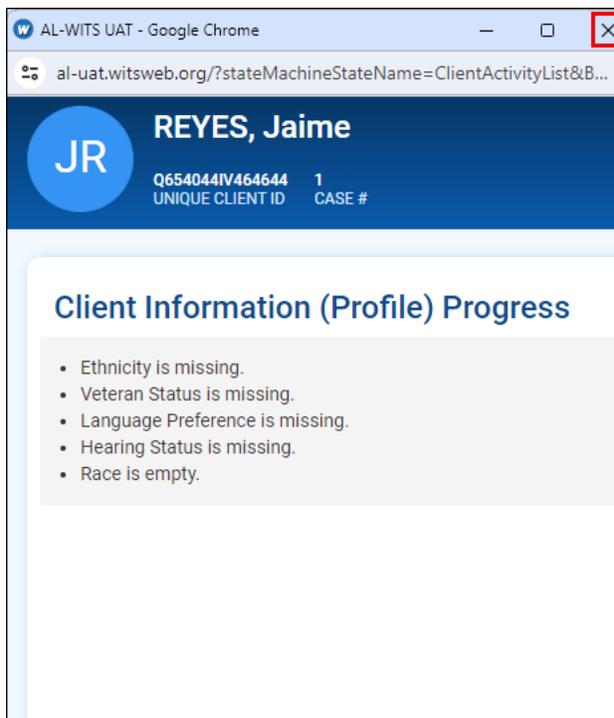


Figure 30: Client Information Profile Progress

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.

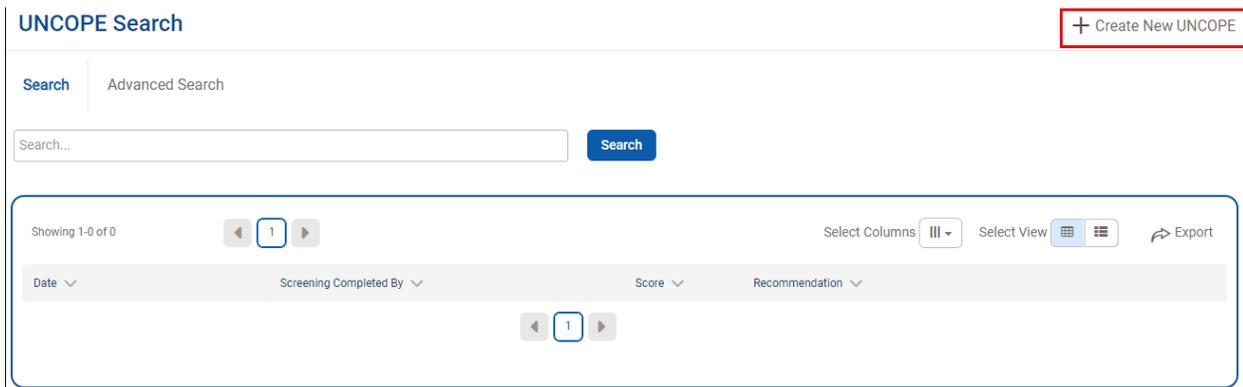


Figure 31: Create UNCOPE

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

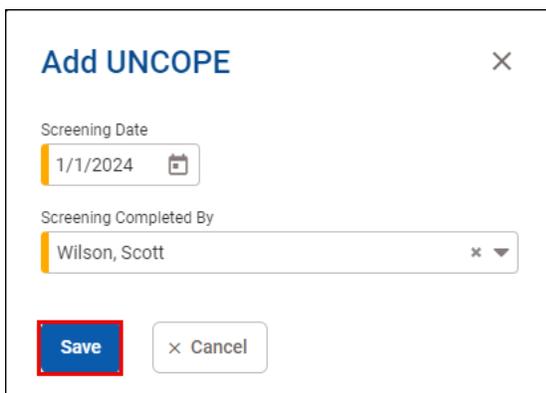


Figure 32: Add UNCOPE

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.

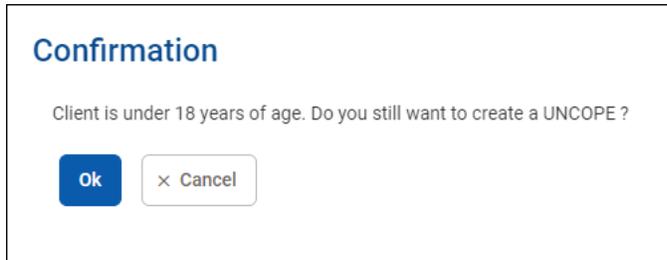


Figure 33: Age Restriction Confirmation

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

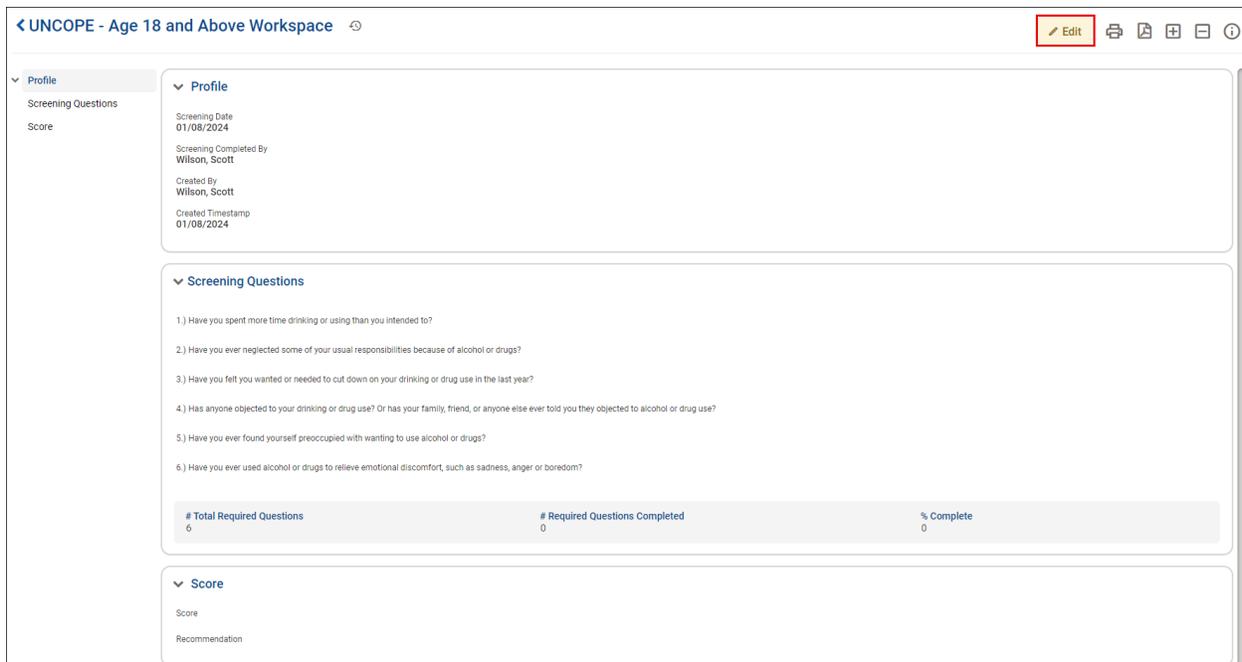


Figure 34: UNCOPE Workspace

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

▼ Screening Questions Next Question

1.) Have you spent more time drinking or using than you intended to?
 Yes
 No

2.) Have you ever neglected some of your usual responsibilities because of alcohol or drugs?
 Yes
 No

3.) Have you felt you wanted or needed to cut down on your drinking or drug use in the last year?
 Yes
 No

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?
 Yes
 No

5.) Have you ever found yourself preoccupied with wanting to use alcohol or drugs?
 Yes
 No

6.) Have you ever used alcohol or drugs to relieve emotional discomfort, such as sadness, anger or boredom?
 Yes
 No

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

Figure 35: UNCOPE Questions

7. 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

Figure 36: UNCOPE Score

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

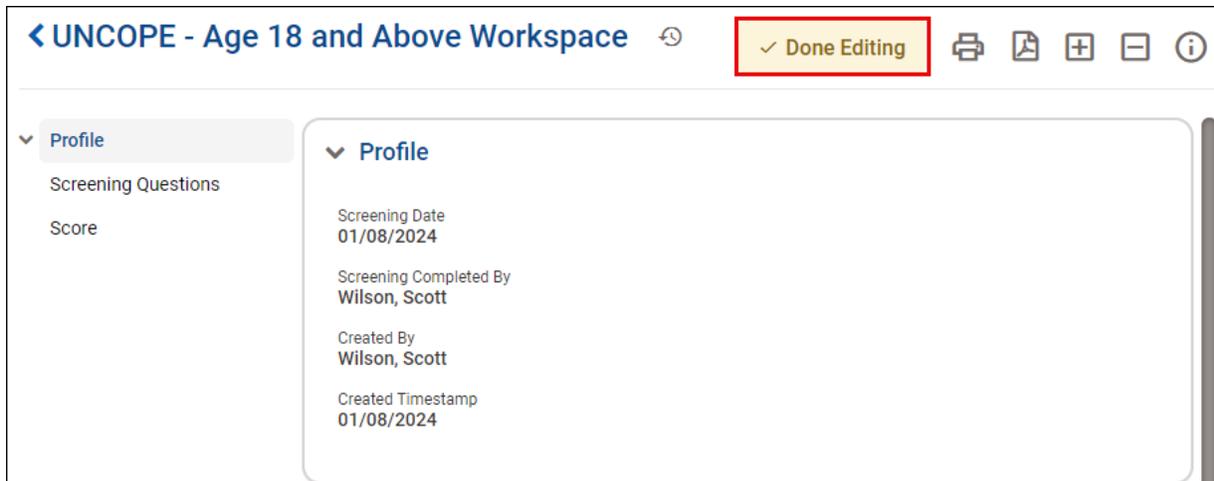


Figure 37: UNCOPE Done Editing

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.

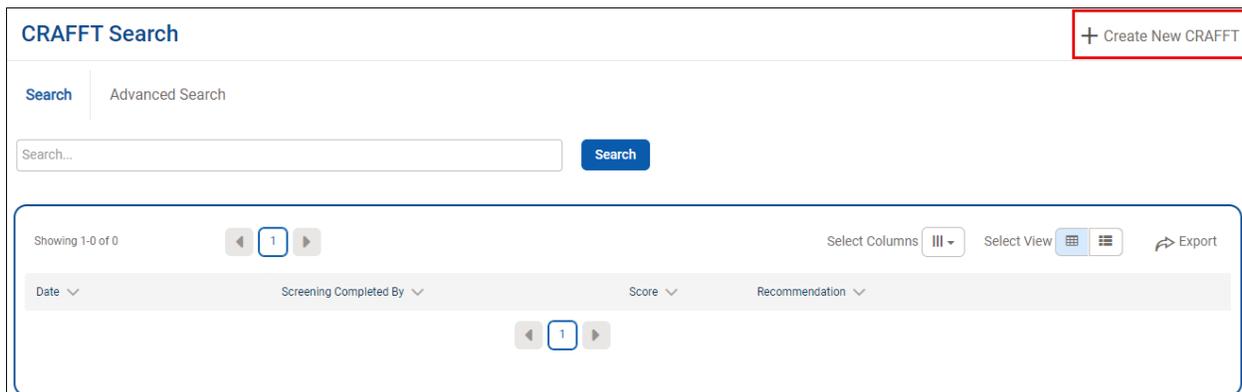
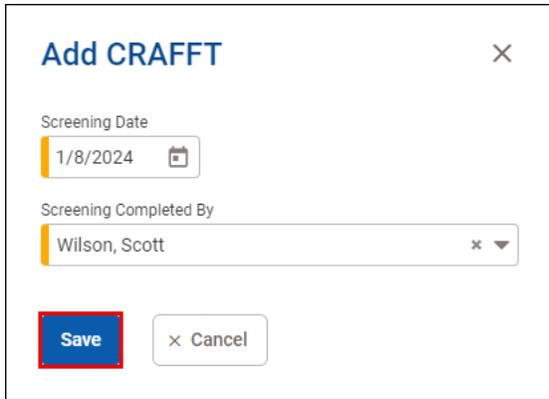


Figure 38: Create CRAFFT

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



Add CRAFFT ✕

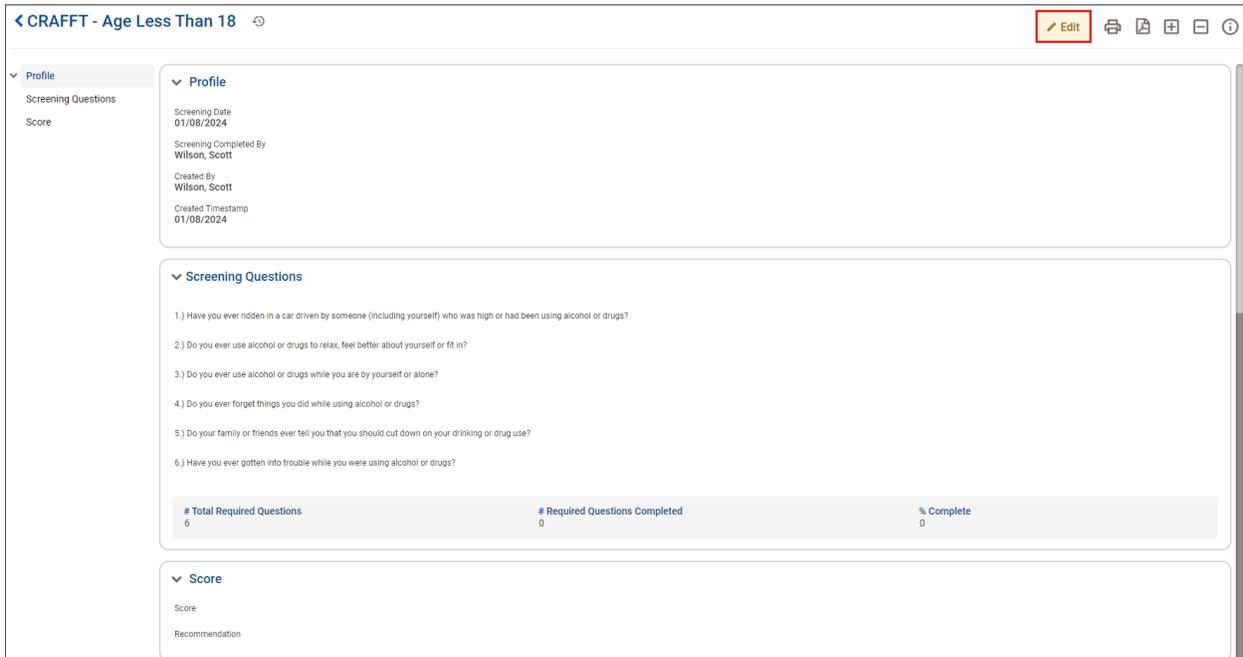
Screening Date
 

Screening Completed By
 ✕ 

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 Print Share Fullscreen Close Help

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 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.

▼ Screening Questions
Next Question

- 1.) Have you ever ridden in a car driven by someone (including yourself) who was high or had been using alcohol or drugs?
 Yes
 No
- 2.) Do you ever use alcohol or drugs to relax, feel better about yourself or fit in?
 Yes
 No
- 3.) Do you ever use alcohol or drugs while you are by yourself or alone?
 Yes
 No
- 4.) Do you ever forget things you did while using alcohol or drugs?
 Yes
 No
- 5.) Do your family or friends ever tell you that you should cut down on your drinking or drug use?
 Yes
 No
- 6.) Have you ever gotten into trouble while you were using alcohol or drugs?
 Yes
 No

Total Required Questions
6
Required Questions Completed
0
% Complete
0

Figure 41: CRAFFT Screening Questions

7. 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

Figure 42: CRAFFT Screening Score

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

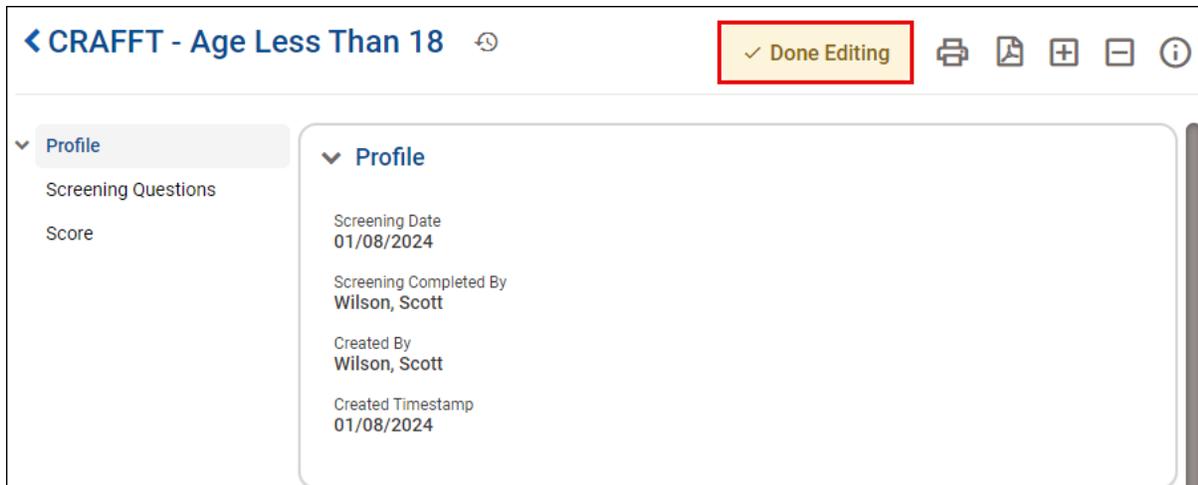


Figure 43: CRAFFT Done Editing

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**.

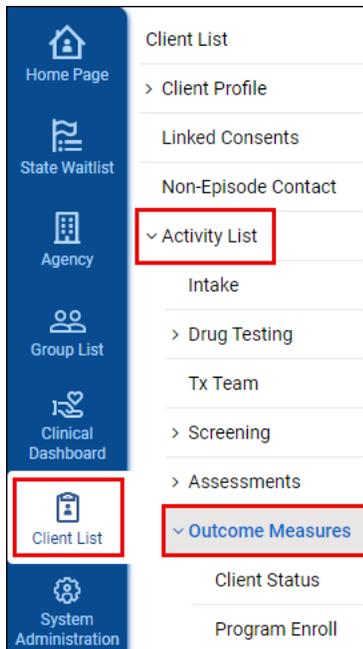


Figure 44: Outcome Measures Navigation

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

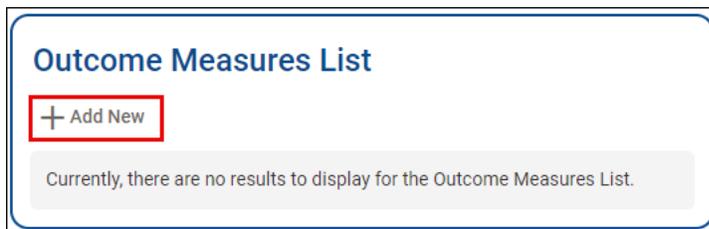


Figure 45: Add Outcome Measure

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: | <input type="text"/> |
| Secondary: | <input type="text"/> |
| Tertiary: | <input type="text"/> |

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)?

< Back Next > Save Save and Finish x Cancel

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. <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> • 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. <p>For each substance identified, complete the severity, frequency, and method fields.</p> |
| 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.

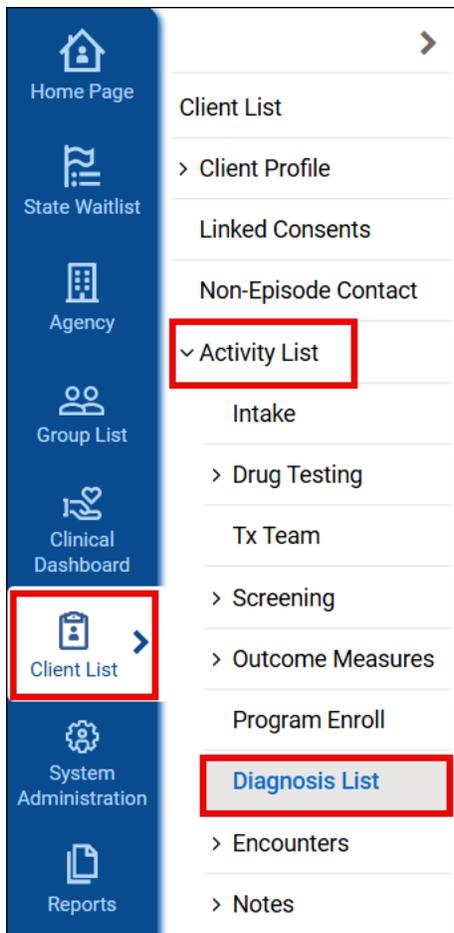


Figure 47: Accessing Diagnosis List

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

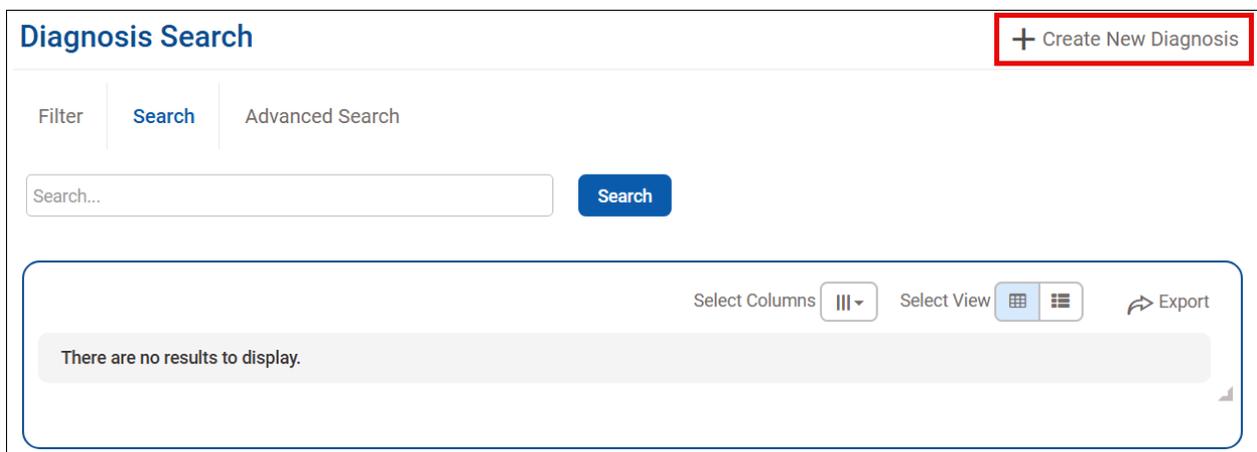


Figure 48: Create Diagnosis

- 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.

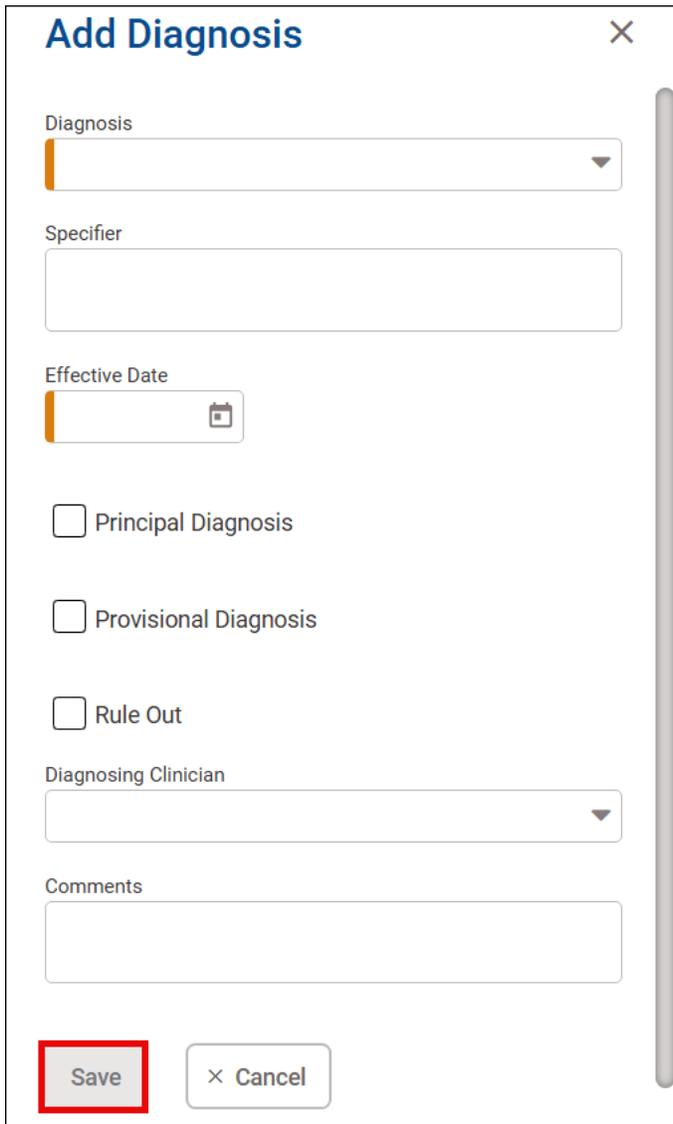


Figure 49: Add Diagnosis

- 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**.

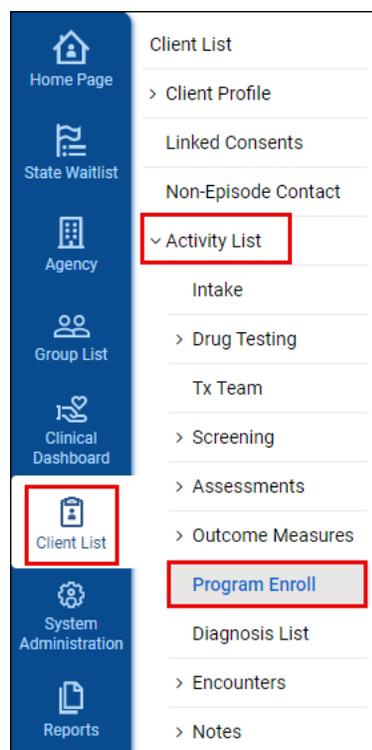


Figure 50: Accessing Program Enrollment

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 To

Program Enrollment List

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

Figure 51: Add Enrollment

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

Program Enrollment Profile

| | | | |
|--|----------------------|----------------------|---------------------------------------|
| Facility | Domain | Days on Wait List | Start Date |
| <input type="text" value="Titan Treatment"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="1/9/2024"/> |
| Program Name | | | End Date |
| <input type="text"/> | | | <input type="text"/> |
| Program Staff | | | Date of Last Contact |
| <input type="text" value="Wilson, Scott"/> | | | <input type="text"/> |
| Termination Reason | <input type="text"/> | | |
| Notes | <input type="text"/> | | |

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.

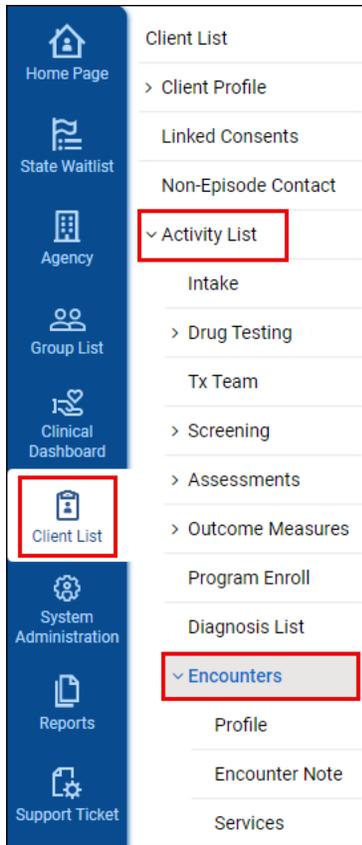


Figure 53: Accessing Encounters

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 End Date

Service

Program

Rendering Staff Encounter Status

Allow Disclosure of Note
 Yes No

Encounter List

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 <input style="width: 50%;" type="text"/> | End Date <input style="width: 50%;" type="text"/> | Start Time <input style="width: 50%;" type="text"/> | End Time <input style="width: 50%;" type="text"/> |
|---|---|---|---|

| | |
|---|--|
| Duration <input style="width: 50%;" type="text"/> | # of Service Units / Sessions <input style="width: 50%;" type="text"/> |
|---|--|

Service Location

Emergency Yes No

Pregnant Yes No

Diagnoses for this Service

Primary

Secondary

Tertiary

Rendering Staff

Secondary Staff

Supervising Staff

< Back
Next >
Save
Save and Finish
× Cancel

Administrative Actions

Release to Billing

Figure 55: Encounter Screen

5. Complete all required and relevant fields.

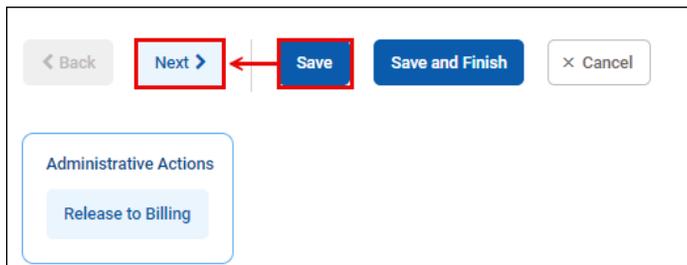


Figure 56: Save/Next Buttons

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

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

Add Objectives

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

Add Interventions

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

Unsigned Notes

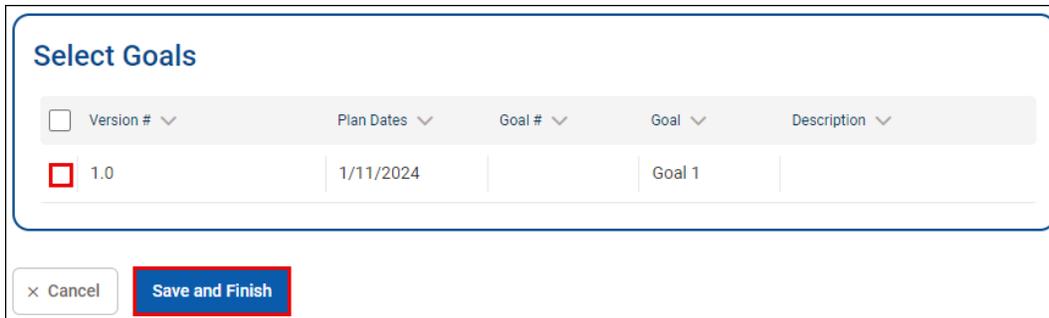
Allow Disclosure
 Yes No

Signed Notes

Administrative Actions

Figure 57: Encounter Notes

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

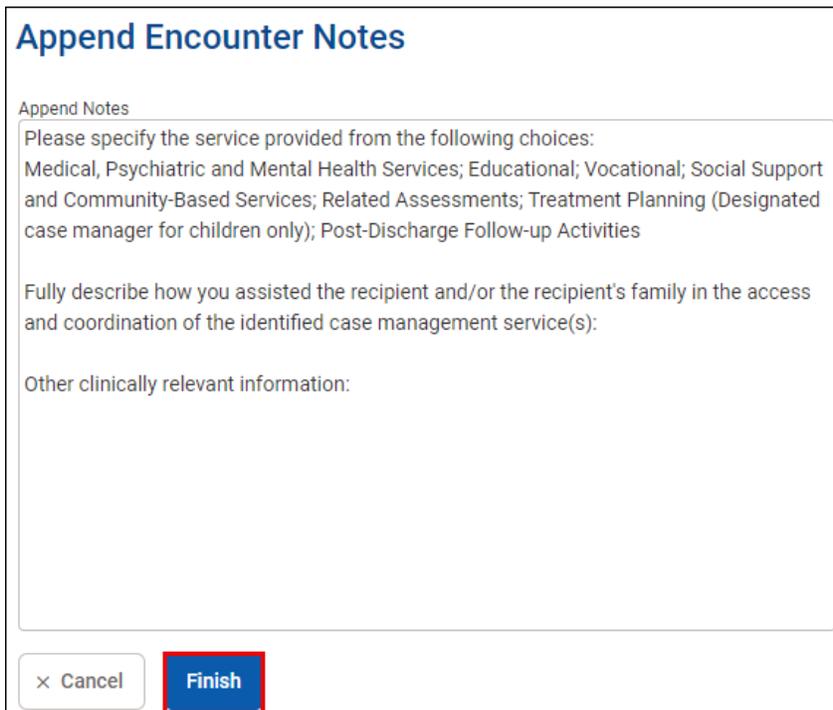


Select Goals

| Version # | Plan Dates | Goal # | Goal | Description |
|---|------------|--------|--------|-------------|
| <input checked="" type="checkbox"/> 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 Wilson, 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

Signed Notes

< Back
Next >
Save
Save and Finish
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.

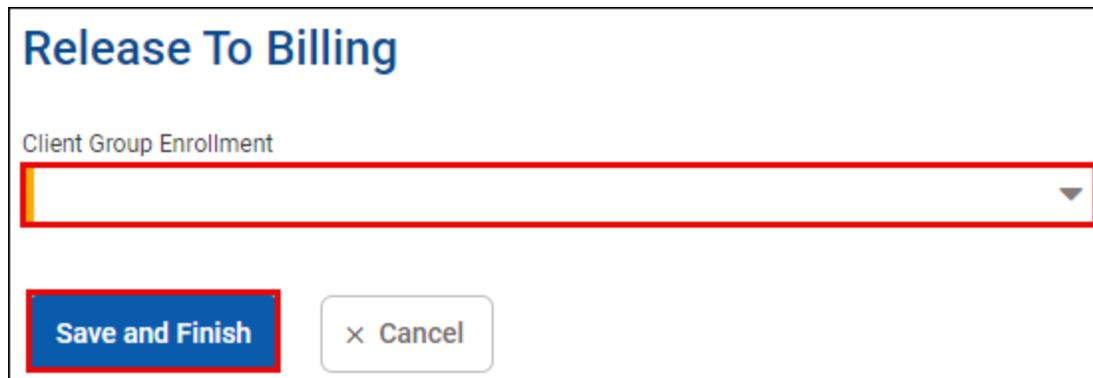


Figure 61: Release to Billing

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**.

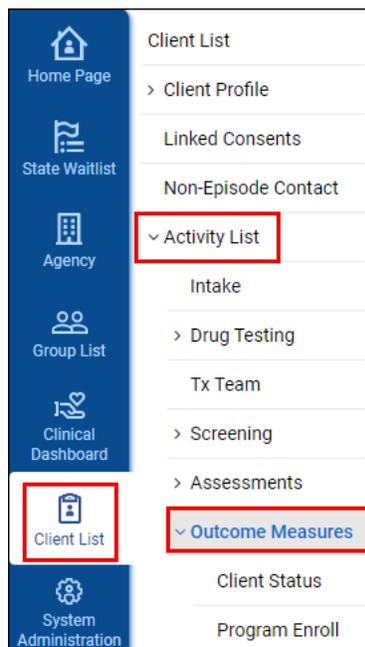


Figure 62: Accessing Outcome Measures

2. The Outcome Measures List screen will display.

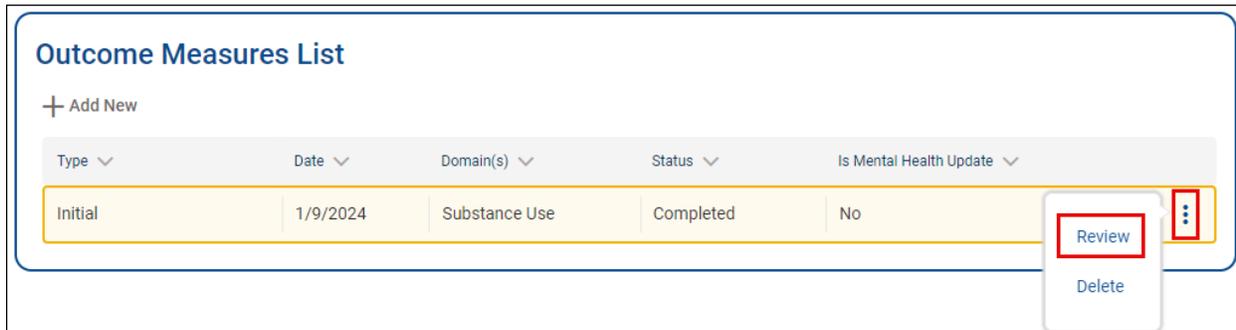


Figure 63: Review Outcome Measure

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.

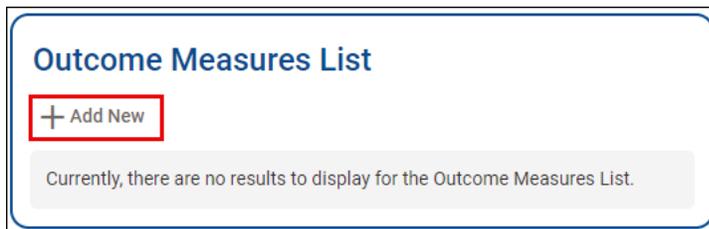


Figure 64: Add Update Outcome Measure

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 | Type: Update

Pregnant: Not Applicable | Due Date:

Domains: | Selected Domains: Substance Use

Profile

Co-dependent/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 30 Days: | Mental Health Legal Status:
 Legal History: 180 Day Commitment, 30 Day Commitment, 90 Day Commitment, Case Pending, Community Sentencing, Court order for observation and evaluation
 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)?:

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**.

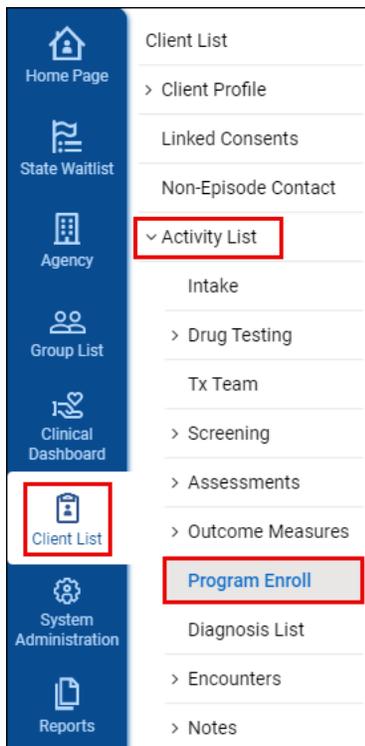


Figure 66: Accessing Program Enrollment - Update

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 To

Program Enrollment List

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

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 <input type="text" value="Titan Treatment"/> | Domain <input type="text" value="Substance Use"/> | Days on Wait List <input type="text" value="0"/> | Start Date <input type="text" value="1/9/2024"/> |
| Program Name <input type="text" value="Intensive Outpatient"/> | | | End Date <input type="text"/> |
| Program Staff <input type="text" value="Wilson, Scott"/> | | | Date of Last Contact <input type="text"/> |
| Termination Reason <input type="text"/> | | | |
| Notes <input type="text"/> | | | |

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**.

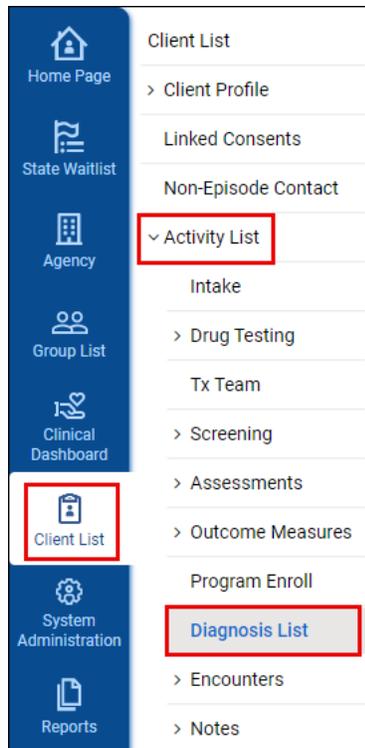


Figure 69: Accessing Diagnosis List

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.

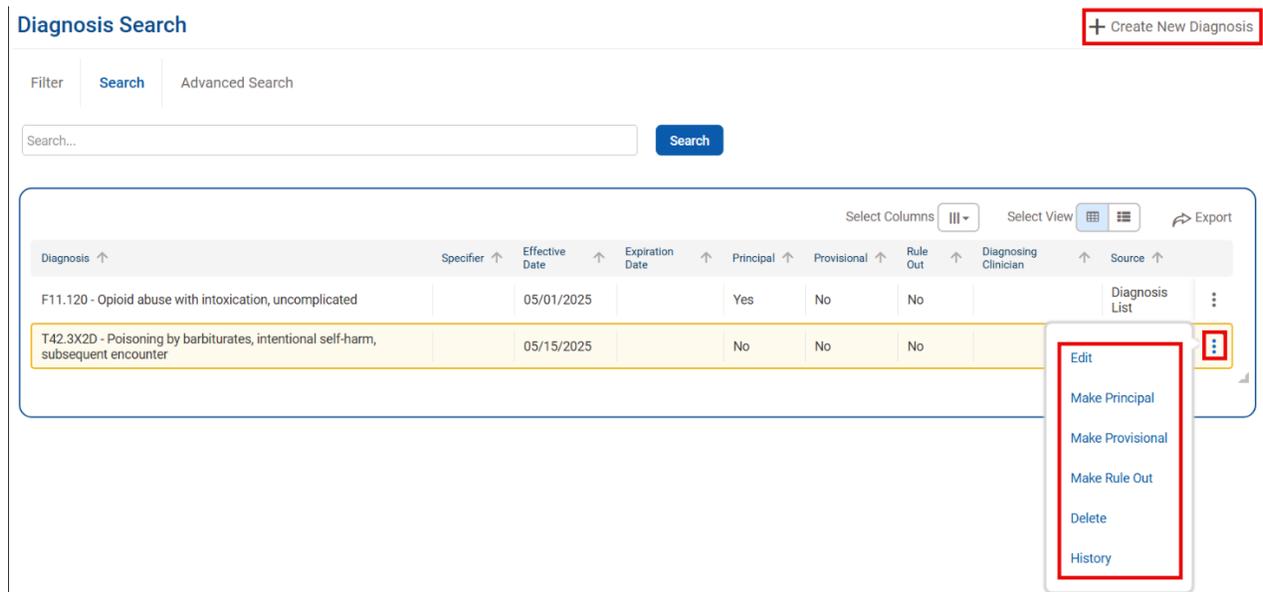


Figure 70: Diagnosis Actions

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

Specifier

Effective Date

Expiration Date

Principal Diagnosis
 Provisional Diagnosis
 Rule Out

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.

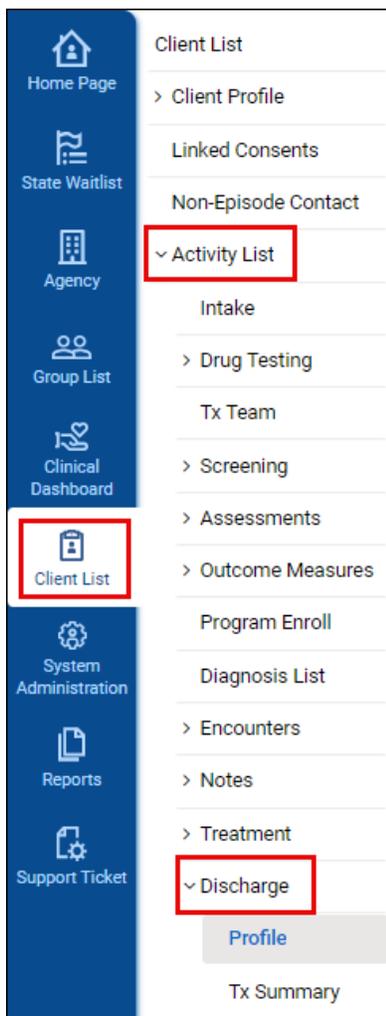
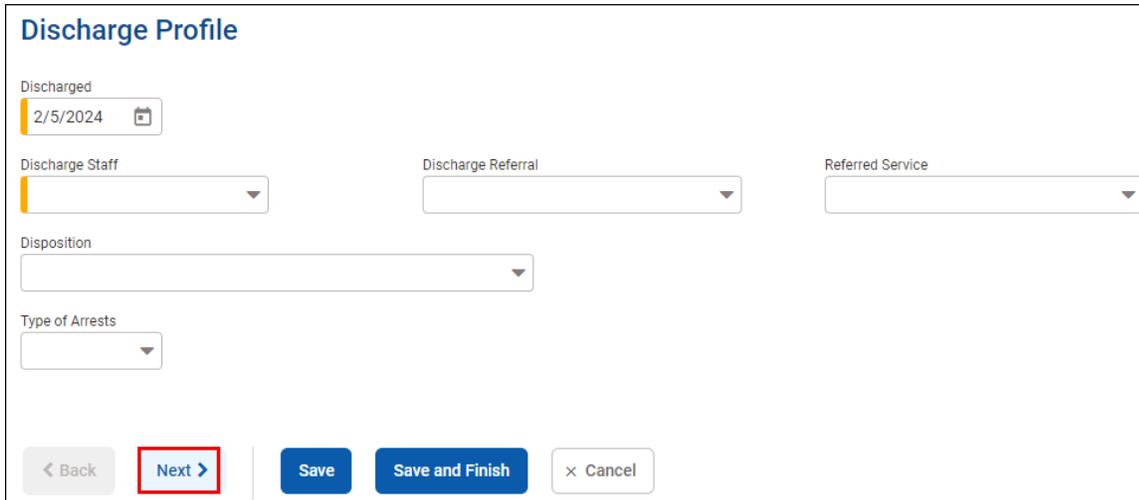


Figure 73: Accessing Discharge

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 and a date field containing "2/5/2024" with a calendar icon. Below this are three dropdown menus: "Discharge Staff", "Discharge Referral", and "Referred Service". Further down are two more dropdown menus: "Disposition" and "Type of Arrests". At the bottom of the form, there are five buttons: "< Back", "Next >" (highlighted with a red box), "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

Figure 75: Discharge Screen

8. Click **Save and Finish**.

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

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 | Created Date | Updated By | Updated Date |
|---------------|--------------|---------------|--------------|
| Wilson, Scott | 1/10/2024 | Wilson, Scott | 2/5/2024 |

Intake Facility: Intake Staff: Case Status:

Initial Contact *: Initial Contact Date: Intake Date:

Pregnant: Due Date: Prenatal Treatment: County:

Primary Referral Source: Secondary Source of Referral:

Referral Contact: HIV Positive:

Injection Drug User: Problem Area:

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

Presenting Problems: Presenting Problems Selected:

Other Presenting Problem Description:

Special Initiative: Special Initiative Selected:

Inter-Agency Service: Inter-Agency Service Selected:

Domains: Selected Domains:

Date Closed:

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**.

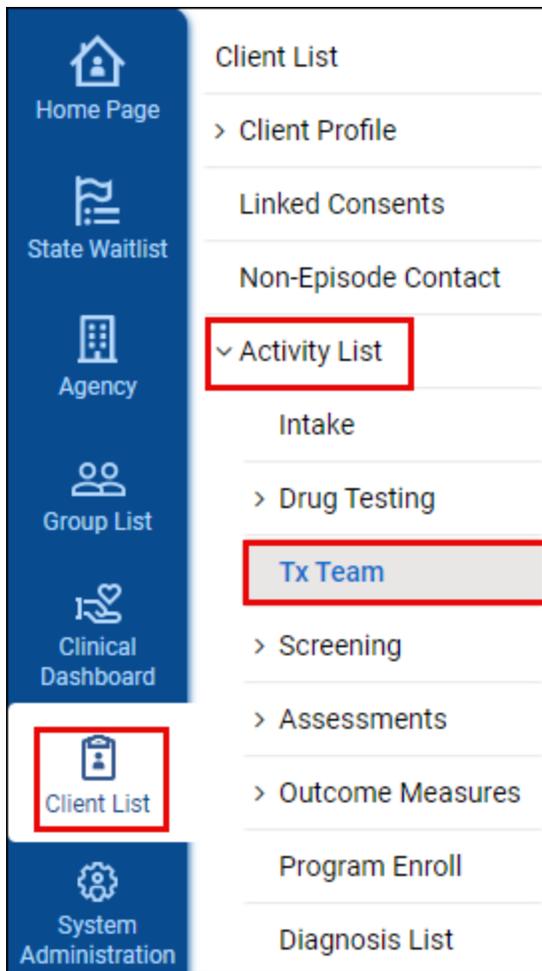


Figure 78: Accessing Treatment Team

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 Yes No

Primary Care Staff Yes No

Deny Access to Client Records Yes No

Treatment Sub-Teams

Recovery

↔

Selected Sub-Teams

Notes

Save
Save and Finish
x 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
x 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**.

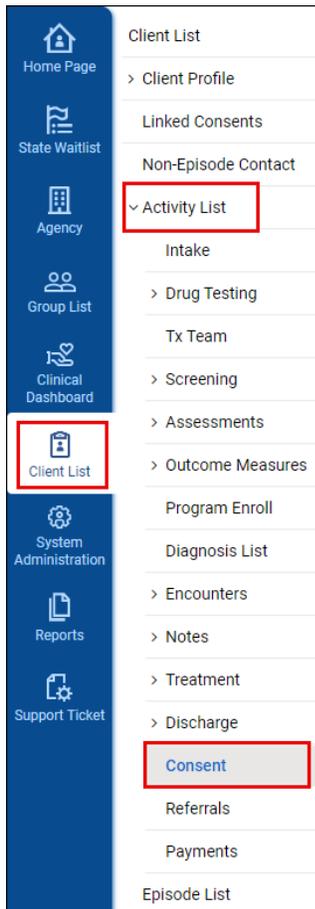


Figure 82: Accessing Consent

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

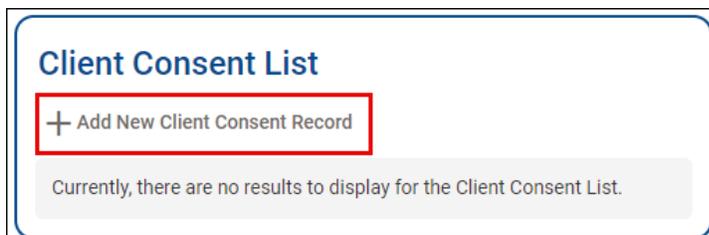


Figure 83: Add Client Consent

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 x No

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 | Unique Client Number | Disclosed From Agency |
|--------------|----------------------|-----------------------|
| Reyes, Jaime | Q6540441V464644 | 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 **c**

*Expiration type is required for Disclosure activities.

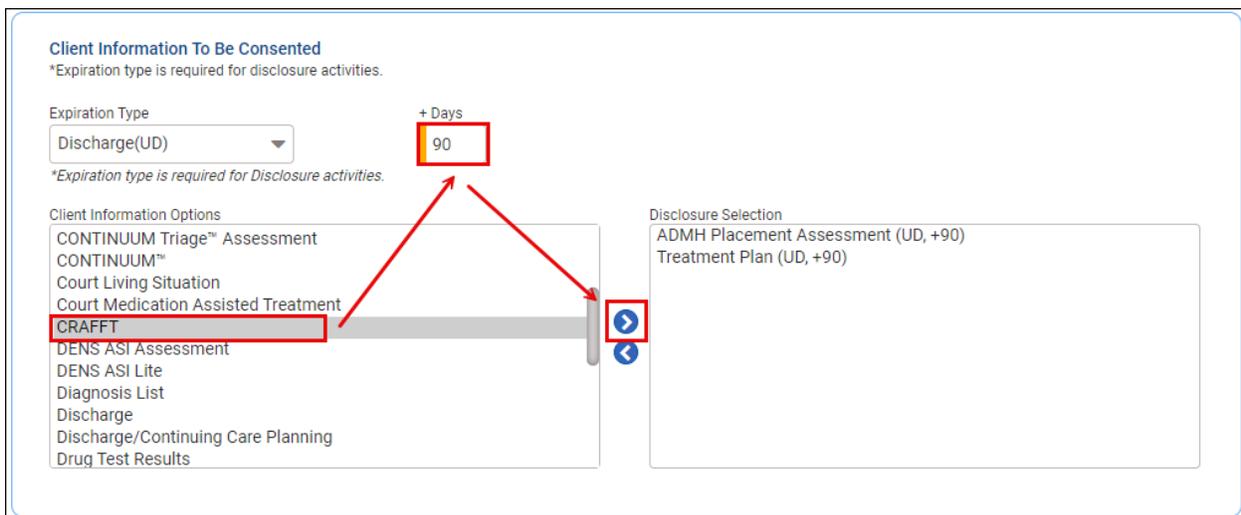
| | | |
|---|--|--|
| <p>Client Information Options</p> <ul style="list-style-type: none"> ADMH Placement Assessment ADMH Update Assessment Admission ASAM ATR Eligibility Screen Behavioral Health Assessment CAGE-AID Screening Client Information (Profile) Client Screening Consent CONTINUUM Triage™ Assessment | <input type="button" value="➤"/> <input type="button" value="⬅"/> | <p>Disclosure Selection</p> <div style="border: 1px solid #ccc; height: 100px;"></div> |
|---|--|--|

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.



Client Information To Be Consented
*Expiration type is required for disclosure activities.

Expiration Type
 Discharge(UD) ▼

+ Days
 90

*Expiration type is required for Disclosure activities.

Client Information Options

- CONTINUUM Triage™ Assessment
- CONTINUUM™
- Court Living Situation
- Court Medication Assisted Treatment
- CRAFFT**
- DENS ASI Assessment
- DENS ASI Lite
- Diagnosis List
- Discharge
- Discharge/Continuing Care Planning
- Drug Test Results

Disclosure Selection

- ADMH Placement Assessment (UD, +90)
- Treatment Plan (UD, +90)

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**.

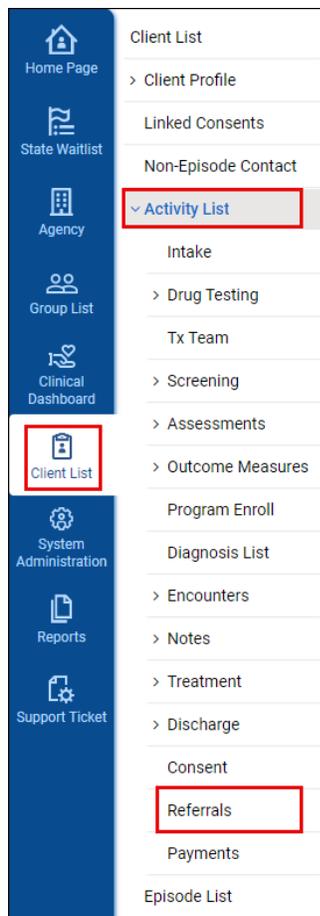


Figure 87: Accessing Referrals

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.

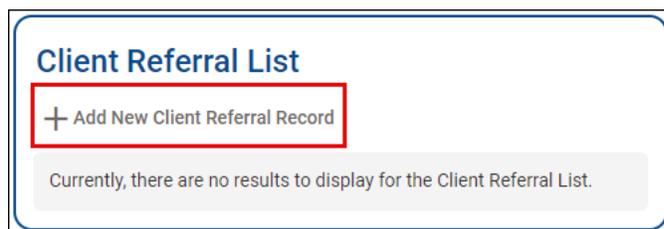


Figure 88: Add Referral Record

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

Referral

Referred By

Agency
Titans Treatment

Facility
Titan Treatment

Staff Member
Wilson, Scott

Program
[Dropdown]

State Reporting Category
[Text]

Reason
[Dropdown]

If Other
[Text]

Is Consent Verification Required?
 Yes No

Is Consent Verified?
 Yes No

Continue This Episode of Care?
 Yes No

Comments
[Text Area]

Referral Status
Referral Created/Pending

Projected End Date
[Calendar]

Created Date
1/10/2024 3:10 PM

Save **Save and Finish**

Referred To

Signed Consents
[Dropdown]

Agency
Titans Treatment

Facility
[Dropdown]

Staff Member
[Dropdown]

Program
[Dropdown]

State Reporting Category
[Text]

Non-System Agency
[Text]

Non-System Modality
[Text]

Non-System Specifier
[Text]

Appt Date
[Calendar]

Consents Granted
[Text Area]

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.

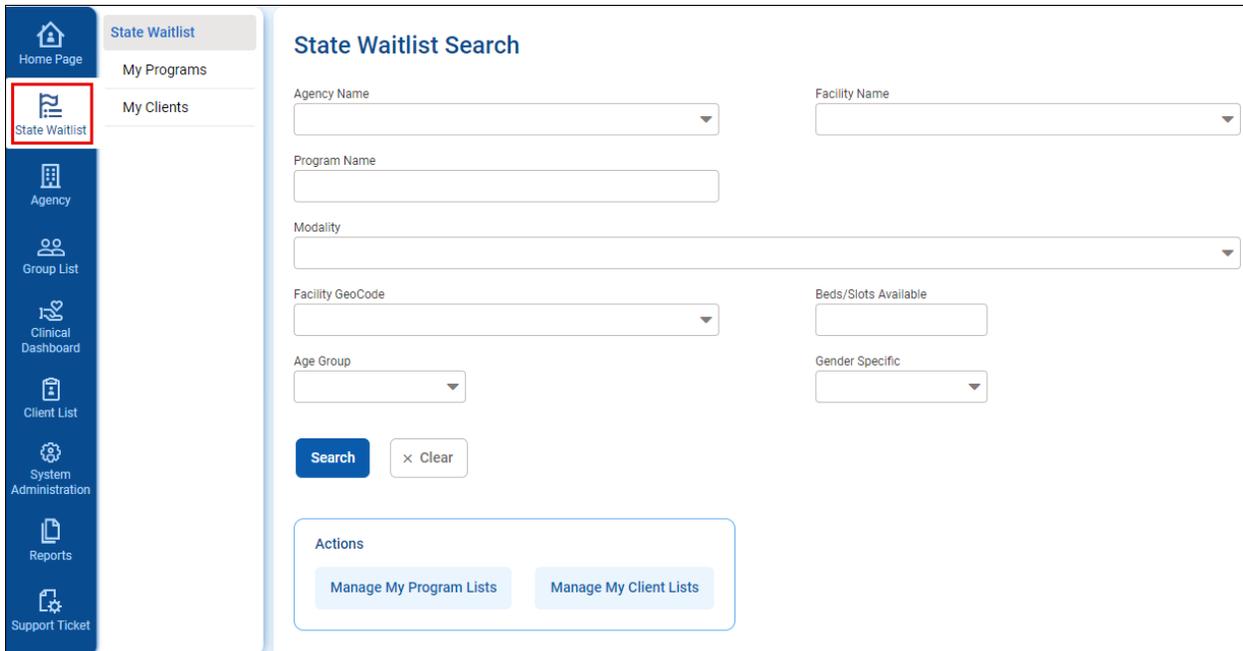


Figure 91: Accessing State Waitlist

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

Program Name

Modality

Facility GeoCode

Age Group

Facility Name

Beds/Slots Available

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 | | ⋮ |

Review List
⋮

Facility Details
⋮

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):

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 |

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?

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.

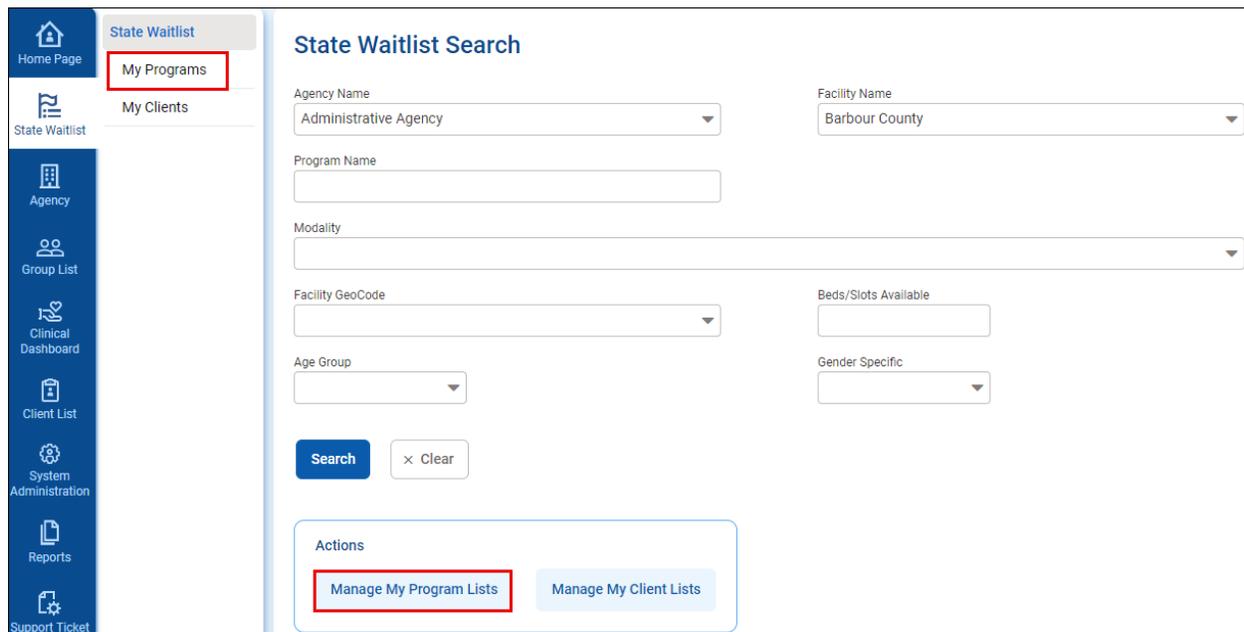
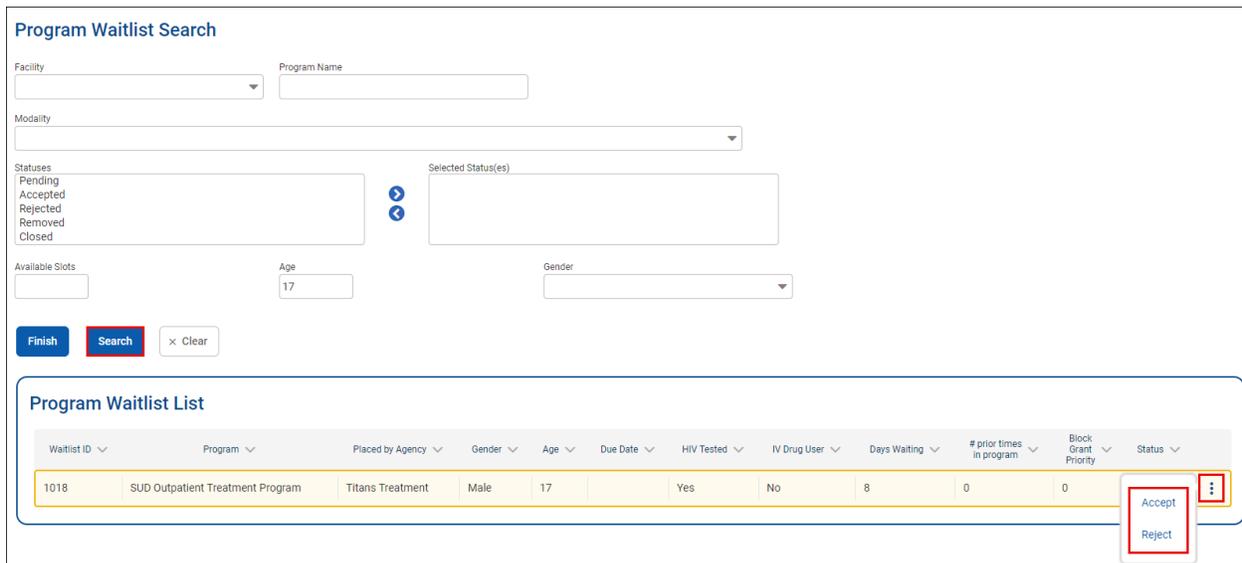


Figure 97: Accessing My Programs

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.

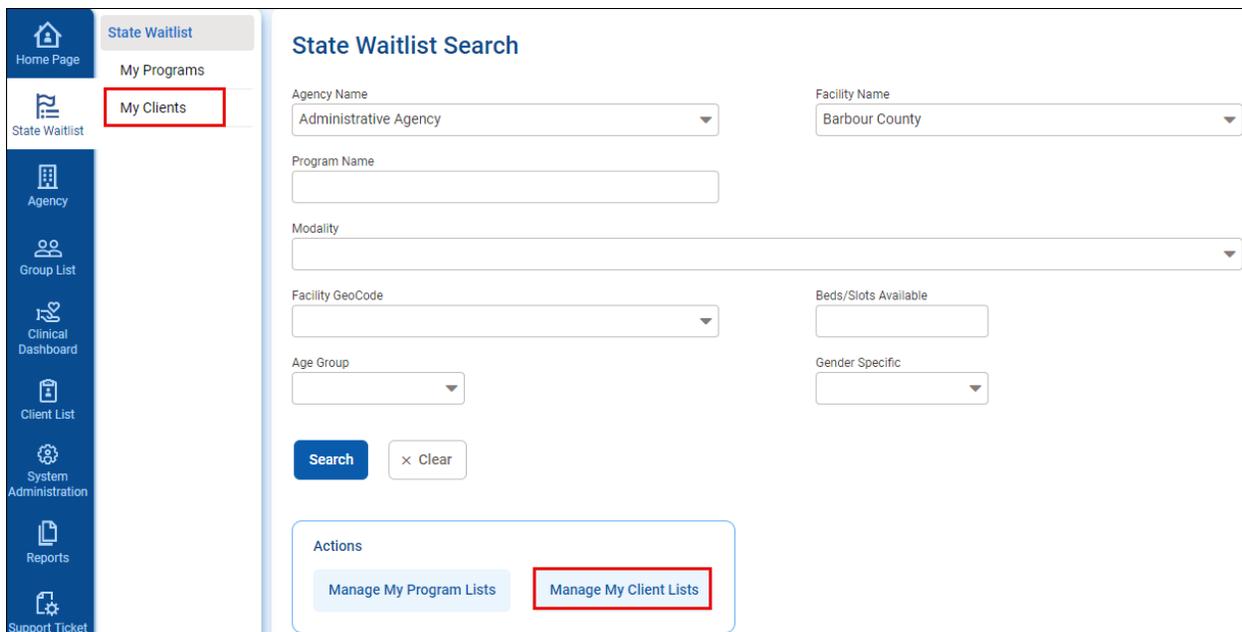


The screenshot shows the 'Program Waitlist Search' interface. It includes search filters for Facility, Program Name, Modality, Statuses (Pending, Accepted, Rejected, Removed, Closed), Selected Status(es), Available Slots, Age (17), and Gender. Below the search filters are 'Finish', 'Search', and 'Clear' buttons. The 'Program Waitlist List' section displays a table with columns: Waitlist ID, Program, Placed by Agency, Gender, Age, Due Date, HIV Tested, IV Drug User, Days Waiting, # prior times in program, Block Grant Priority, and Status. A row is highlighted with a yellow background, showing Waitlist ID 1018, Program SUD Outpatient Treatment Program, Placed by Agency Titans Treatment, Gender Male, Age 17, Due Date, HIV Tested Yes, IV Drug User No, Days Waiting 8, # prior times in program 0, Block Grant Priority 0, and Status. To the right of the row are 'Accept' and 'Reject' buttons, both highlighted with red boxes.

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.



The screenshot shows the 'State Waitlist Search' interface. On the left is a navigation menu with options: Home Page, State Waitlist, My Programs, My Clients (highlighted with a red box), Agency, Group List, Clinical Dashboard, Client List, System Administration, Reports, and Support Ticket. The main content area has search filters for Agency Name (Administrative Agency), Facility Name (Barbour County), Program Name, Modality, Facility GeoCode, Beds/Slots Available, Age Group, and Gender Specific. Below the filters are 'Search' and 'Clear' buttons. At the bottom, there is an 'Actions' section with two buttons: 'Manage My Program Lists' and 'Manage My Client Lists' (highlighted with a red box).

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

Statuses

- Pending
- Accepted
- Rejected
- Removed
- Closed

↔

Selected Status(es)

Client Waitlist List

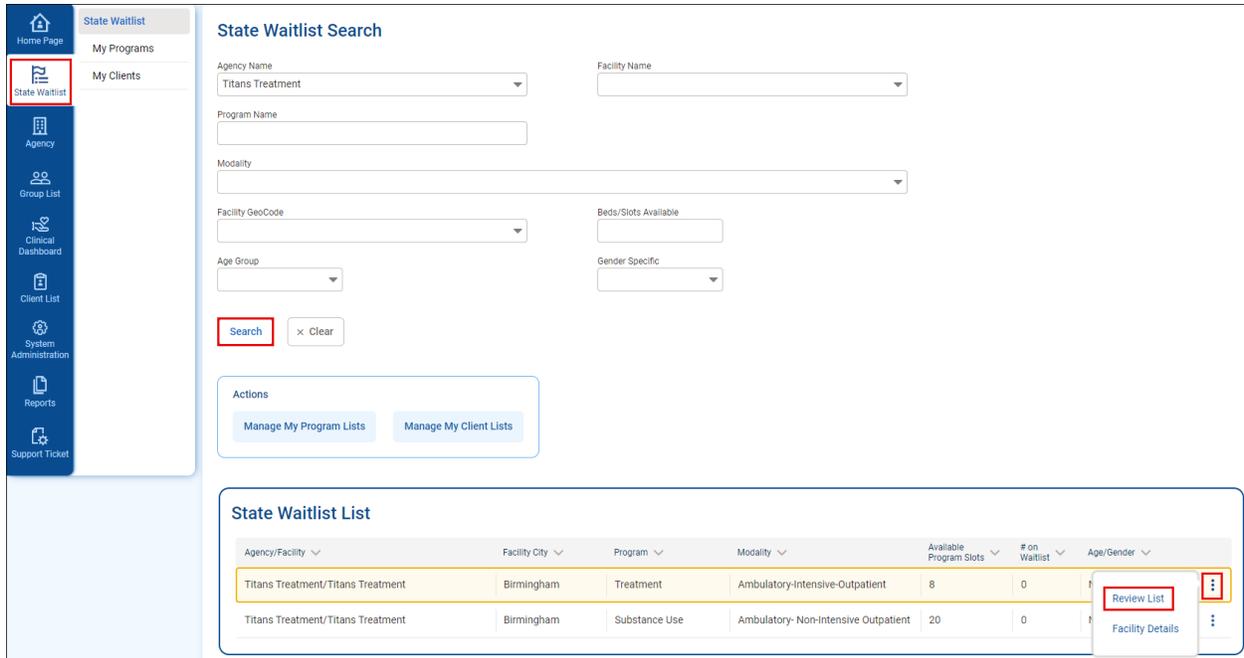
| Waitlist ID | Client Name | Agency/Facility | Program Name | Days Waiting | Priority | HIV Tested | IV Drug User | Due Date | Age | Gender | Status |
|-------------|----------------|---|--------------|--------------|----------|------------|--------------|----------|-----|--------|--------|
| 7 | Stark,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

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**.



State Waitlist Search

Agency Name: Titans Treatment | Facility Name: | Program Name: | Modality: | Facility GeoCode: | Beds/Slots Available: | Age Group: | Gender Specific: | Search | x 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 |
| Titans Treatment/Titans Treatment | Birmingham | Substance Use | Ambulatory- Non-Intensive Outpatient | 20 | 0 | | Facility Details |

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 |
| Statures | Pending Accepted Rejected Removed Closed | | Selected Status(es) |

➤
➤

Finish **Search**

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 <input type="text"/> |
| Date Closed <input type="text"/> | Client Name <input type="text" value="Type here to search..."/> | Unique Client Number <input type="text"/> |
| Gender <input type="text"/> | DOB <input type="text"/> | Last 4 of SSN <input type="text"/> |
| Pregnant <input type="text"/> | Due Date <input type="text"/> | IV Drug User <input type="text"/> |
| HIV Tested <input type="text"/> | | |
| Other Priority Options All Other Contract KY Pregnant/IV Users State Probation/Parole | <input type="button" value="➤"/> <input type="button" value="➤"/> | Selected Priority Options <input type="text"/> |
| BG Priority <input type="text"/> | Add client to all readiness lists for this modality? <input type="radio"/> Yes <input checked="" type="radio"/> No | |
| Rejection Reason <input type="text"/> | | |
| <input type="button" value="Save"/> <input type="button" value="Save and Finish"/> <input type="button" value="x Cancel"/> | | |

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**.

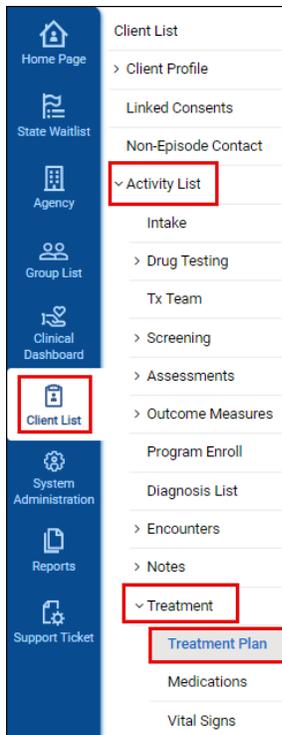


Figure 104: Accessing Treatment Plan

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.

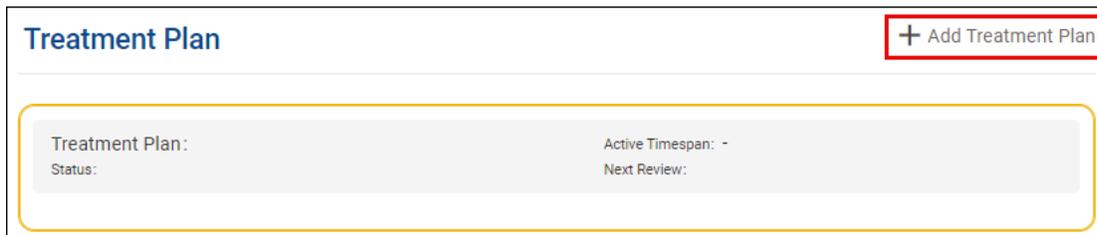
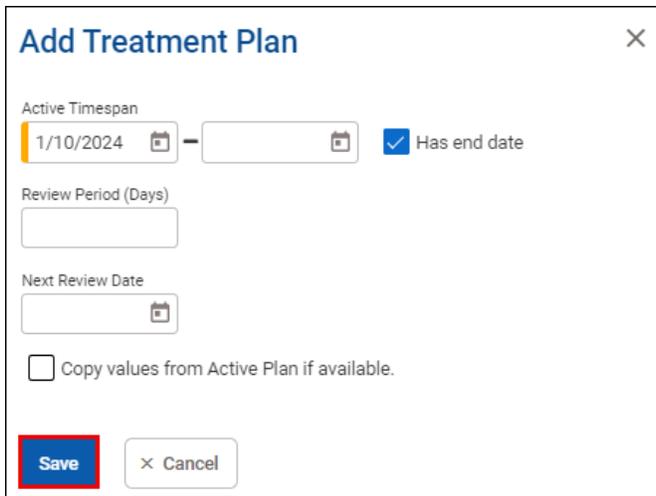


Figure 105: Add Treatment Plan

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.



Add Treatment Plan ×

Active Timespan
1/10/2024 Has end date

Review Period (Days)

Next Review Date

Copy values from Active Plan if available.

Save × Cancel

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.

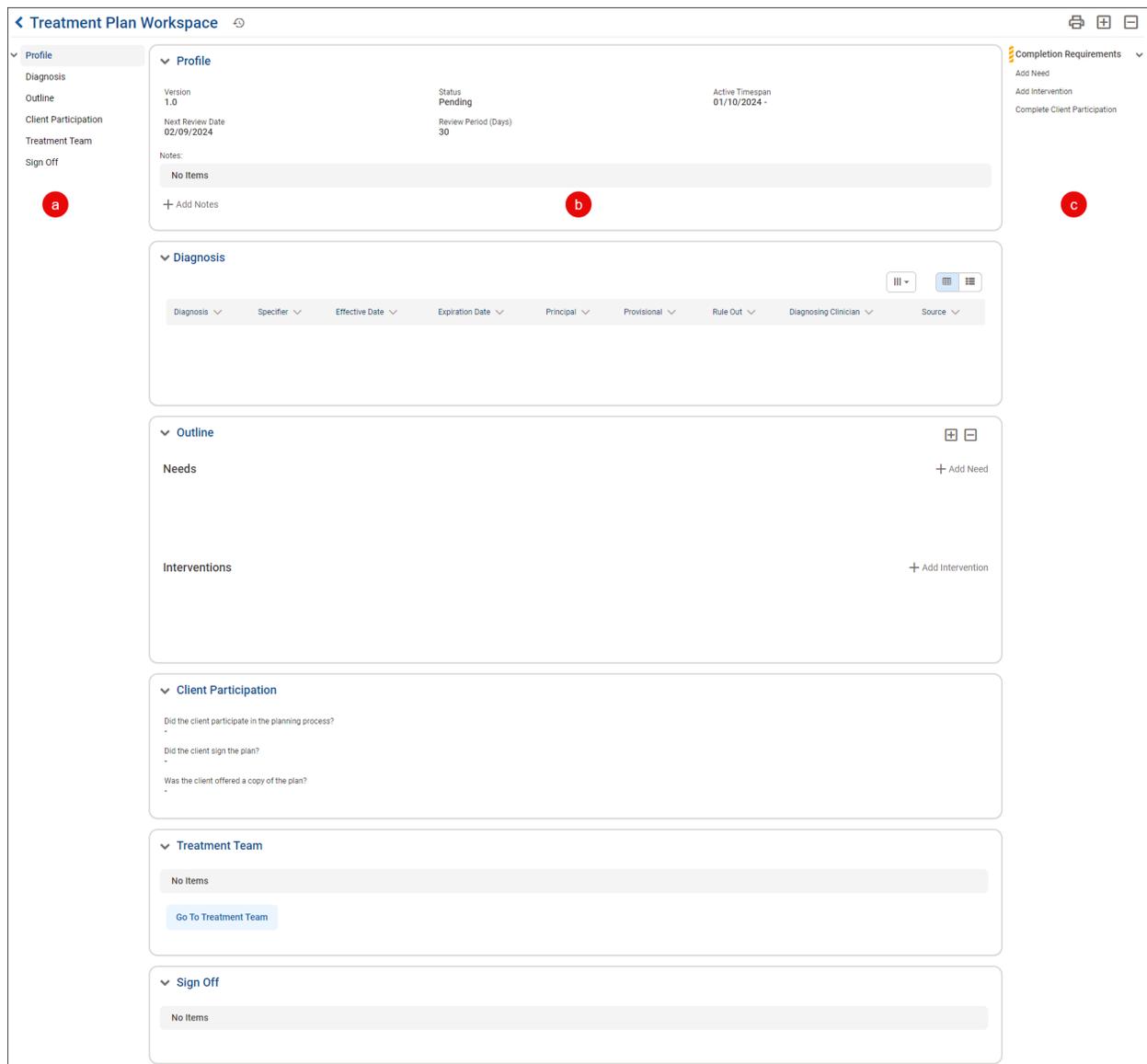


Figure 107: Treatment Plan Workspace

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**.

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

Figure 108: Treatment Plan Profile

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

Type

Note

Save
× Cancel

Figure 109: Notes Window

5. Click **Save**.

4.4.2. Diagnosis

This section lists the client's diagnosis.

Diagnosis

| 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 |

Figure 110: Treatment Plan - Diagnosis

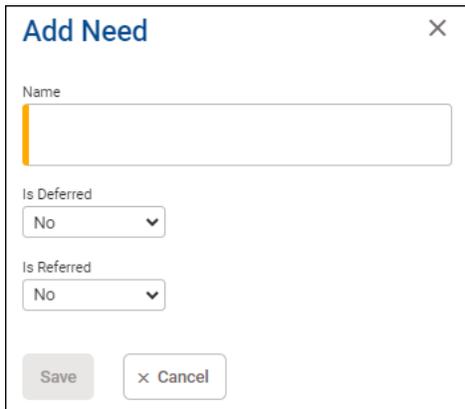
4.4.3. Outline

This section allows the user to capture needs, goals, and interventions.



Figure 111: Needs and Interventions

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



The 'Add Need' dialog box has a title bar with a close button (X). It contains the following fields and controls:

- Name:** A text input field with a yellow cursor.
- Is Deferred:** A dropdown menu currently set to 'No'.
- Is Referred:** A dropdown menu currently set to 'No'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

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.

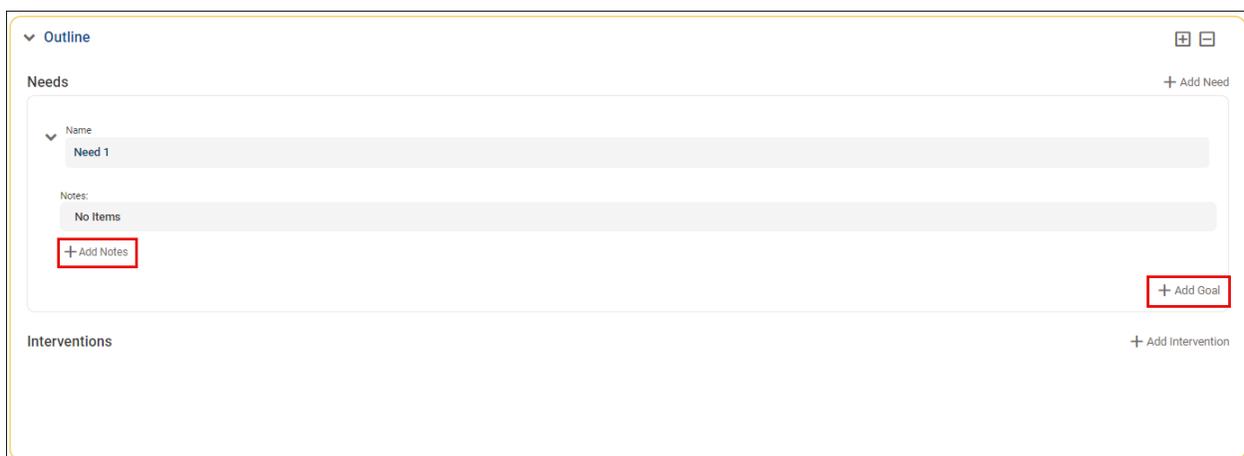


Figure 113: Outline with Added Need

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' dialog box contains the following fields and controls:

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

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' view shows a hierarchical structure of Needs and Goals:

- Needs:** A section with a '+ Add Need' button. It contains a 'Need 1' entry with a 'Notes' section showing 'No Items' and a '+ Add Notes' button.
- Goals:** A section with a '+ Add Goal' button. It contains a 'Goal 1' entry with a 'Notes' section showing 'No Items' and a '+ Add Notes' button. A '+ Add Objective' button is also present at the bottom right of the Goals section.
- Interventions:** A section with a '+ Add Intervention' button.

Red boxes highlight the '+ Add Notes' button under 'Goal 1' and the '+ Add Objective' button.

Figure 115: Outline with Goal Added

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



Add Objective [X]

Name

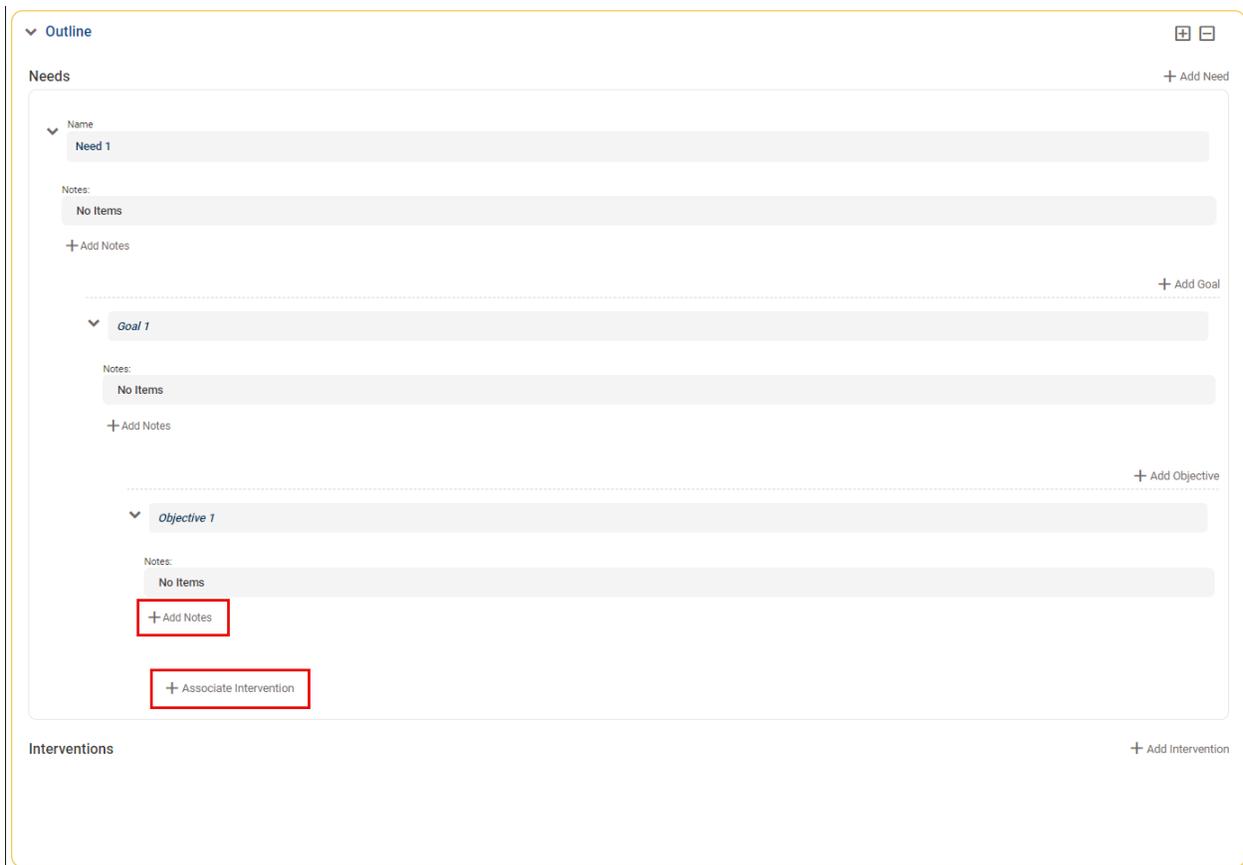
Projected
 [Calendar icon]

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 [Icons]

Needs [Add Need]

Name
 Need 1

Notes:
 No Items
 + Add Notes

+ Add Goal

Goal 1

Notes:
 No Items
 + Add Notes

+ Add Objective

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.

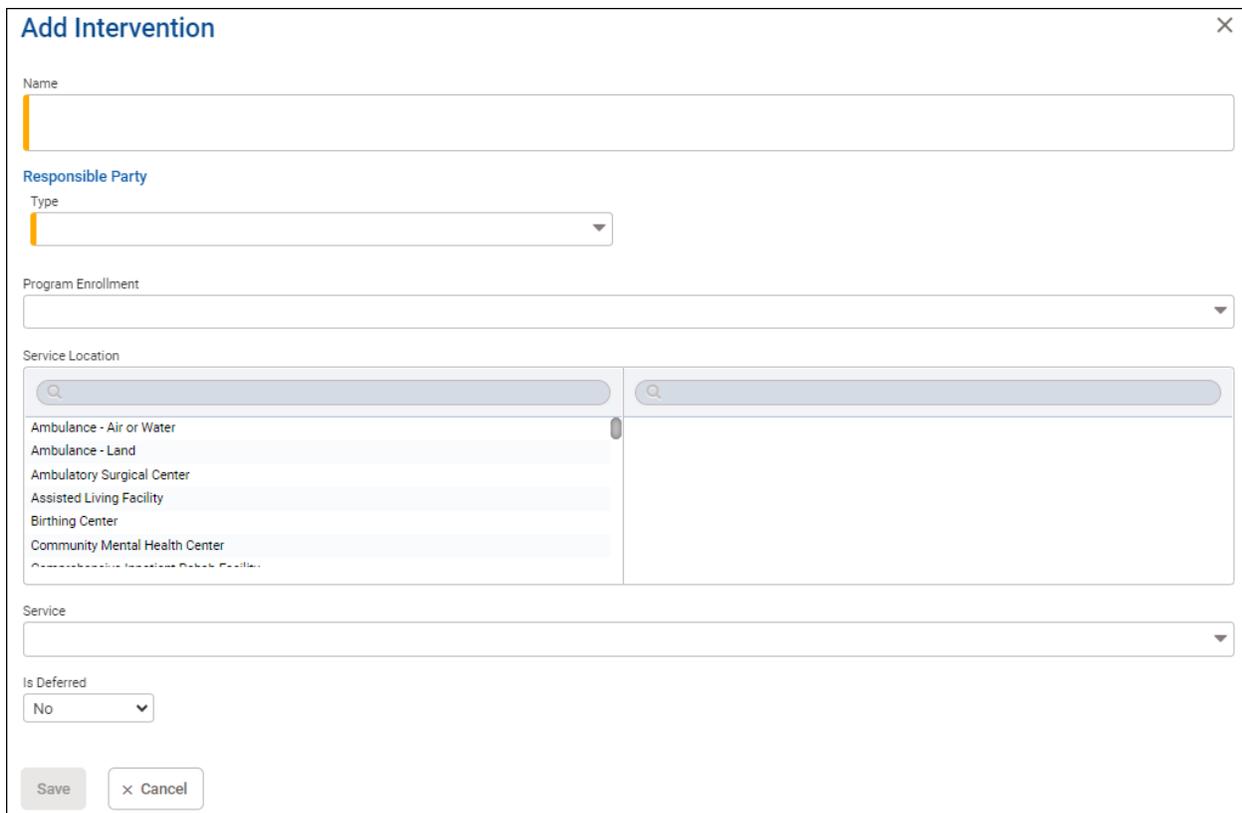


Figure 118: Add Intervention

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.

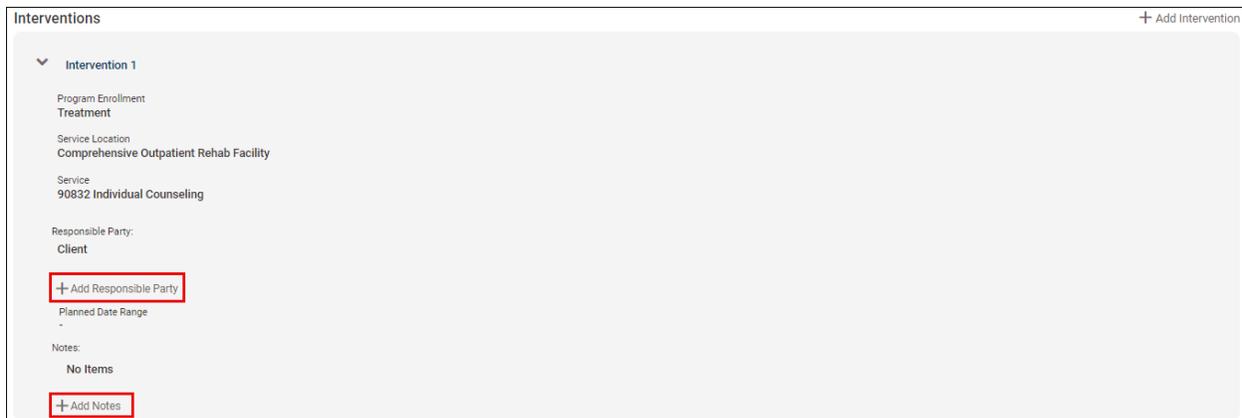


Figure 119: Outline with Intervention Added

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

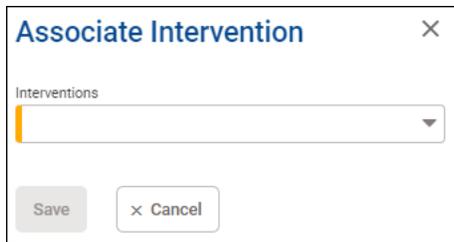


Figure 120: Associate Intervention

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 + Add Need

▼ 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 + 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

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.

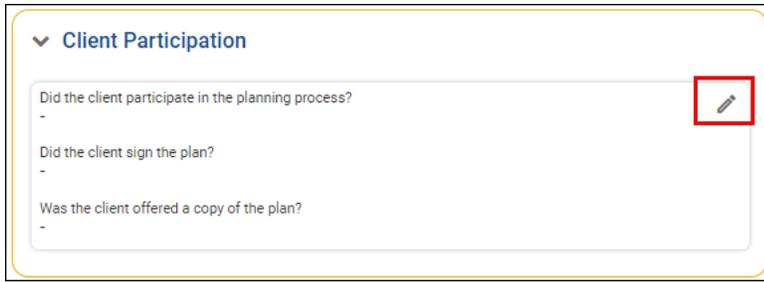


Figure 122: Client Participation

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.

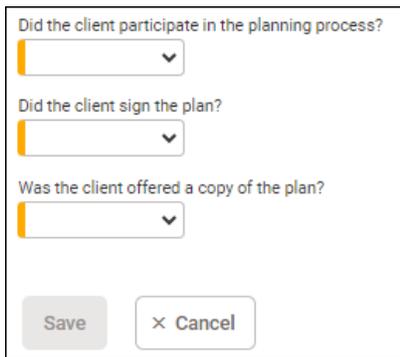


Figure 123: Client Participation Questions

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**.

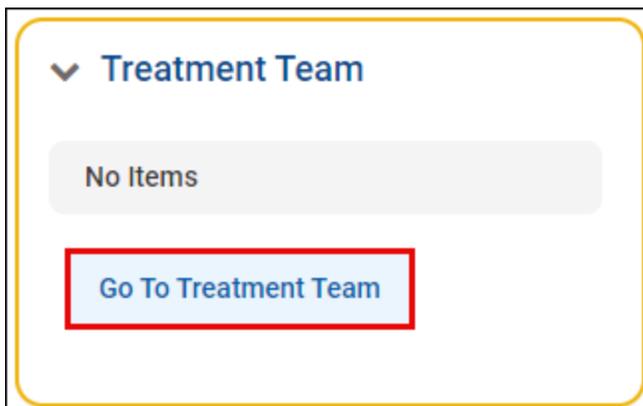
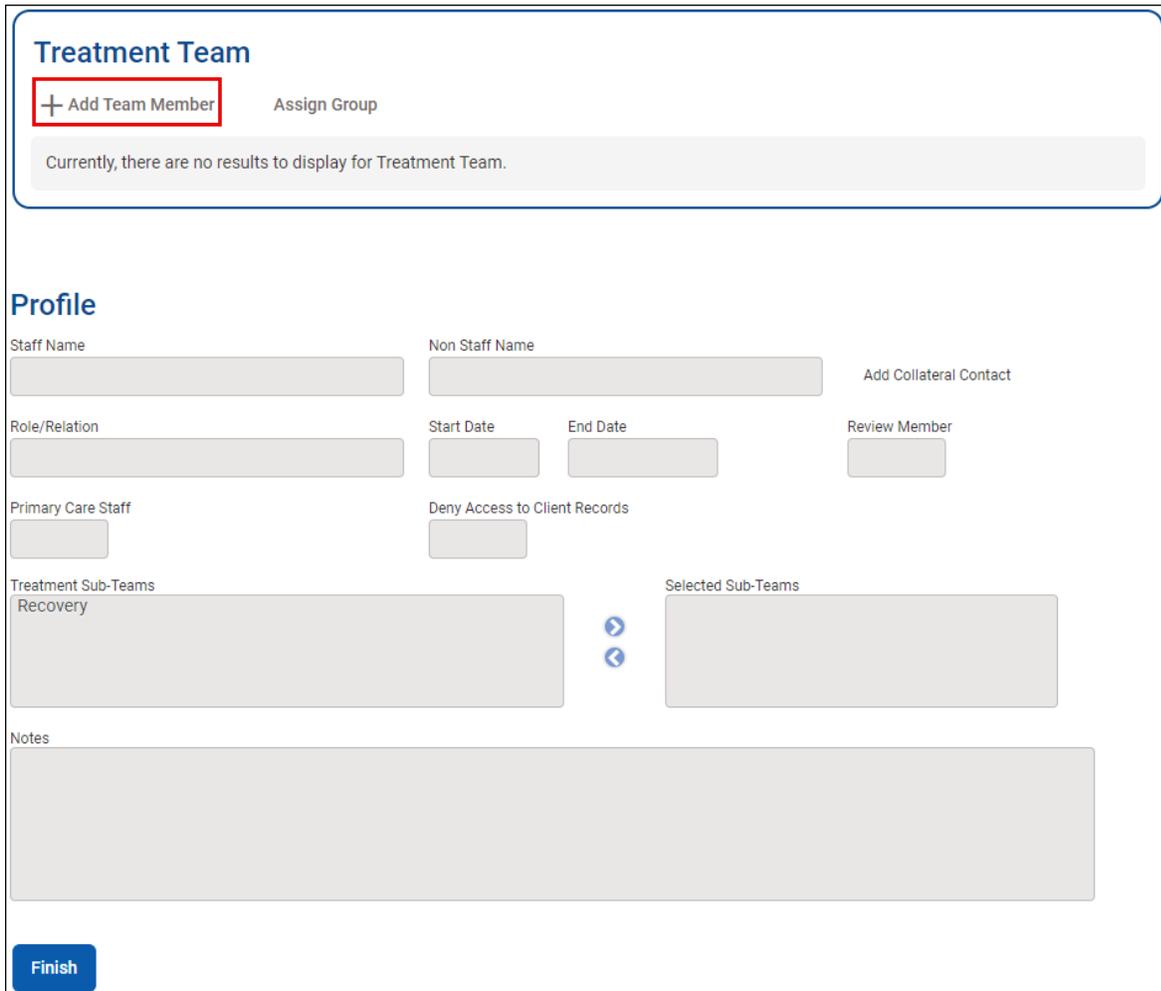


Figure 124: Go To Treatment Team Button

2. The Treatment Team screen will display.

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



The screenshot shows the 'Treatment Team' section of a software interface. At the top, there is a header 'Treatment Team' and a red-bordered button labeled '+ Add Team Member'. To its right is a link 'Assign Group'. Below this is a message: 'Currently, there are no results to display for Treatment Team.' The 'Profile' section below contains several input fields: 'Staff Name', 'Non Staff Name', 'Add Collateral Contact', 'Role/Relation', 'Start Date', 'End Date', 'Review Member', 'Primary Care Staff', and 'Deny Access to Client Records'. There are also two boxes for 'Treatment Sub-Teams' (containing 'Recovery') and 'Selected Sub-Teams', with arrows between them. A 'Notes' text area is at the bottom, and a blue 'Finish' button is in the bottom left corner.

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
1/24/2024

End Date

Review Member
 Yes No

Primary Care Staff
 Yes No

Deny Access to Client Records
 Yes No

Treatment Sub-Teams
Recovery

➔
➜

Selected Sub-Teams

Notes

[Save](#)

[Save and Finish](#)

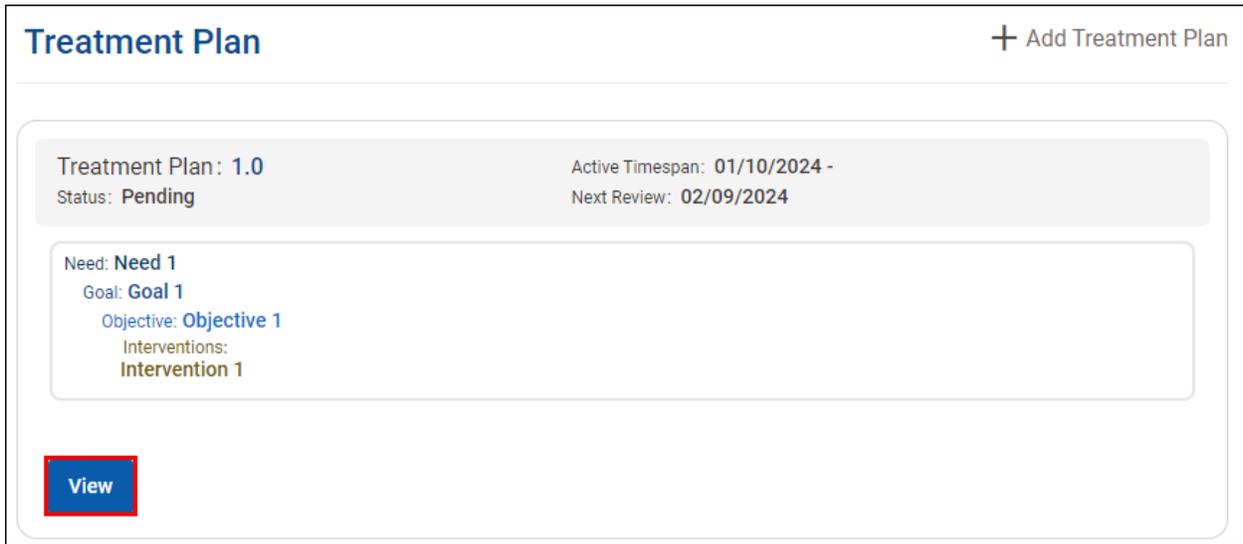
[× Cancel](#)

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

| 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 | <div style="border: 1px solid red; padding: 2px; display: inline-block;">Review</div> ⋮ |
| 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.



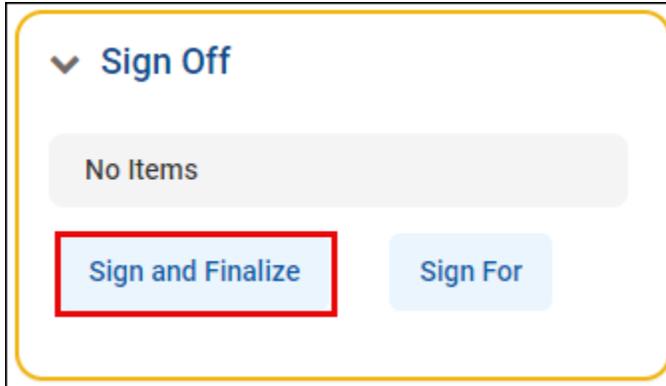
The screenshot shows the 'Treatment Plan' interface. At the top left is the title 'Treatment Plan' and at the top right is a '+ Add Treatment Plan' button. Below this is a summary card for 'Treatment Plan: 1.0' with a status of 'Pending'. It also shows an 'Active Timespan: 01/10/2024 -' and a 'Next Review: 02/09/2024'. A detailed view below lists 'Need: Need 1', 'Goal: Goal 1', 'Objective: Objective 1', and 'Interventions: Intervention 1'. A red-bordered 'View' button is located at the bottom left of the card.

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**.



The screenshot shows the 'Sign Off' section with a dropdown arrow. Below the title is a 'No Items' message in a grey box. At the bottom, there are two buttons: 'Sign and Finalize' (highlighted with a red border) and 'Sign For'.

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.

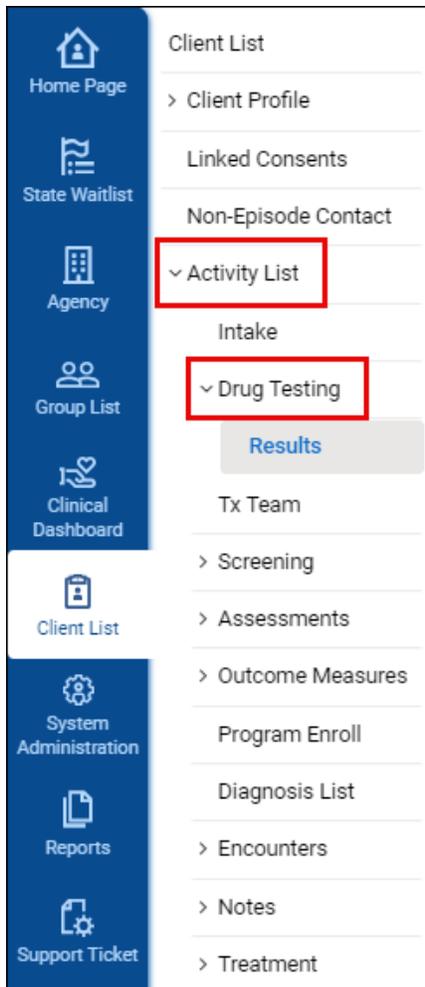


Figure 130: Accessing Drug Testing Results

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 To Date

Drug Test Result List

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

Staff

Facility

Location

Blood Alcohol Content

Marijuana Content

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

Add Drug Test Results

Drug Type

- Alcohol
- Amphetamines
- Barbiturates
- Benzodiazepine
- Cocaine
- Creat
- Hallucinogens
- Heroin
- Inhalants
- Marijuana

Test Result

Drug Test Results List

Test Result

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

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 Type

Comments

Staff

Facility

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

Drug Test Results List

Test Result

| | Drug | Test Result | |
|--------------------------|-----------|----------------------|---|
| <input type="checkbox"/> | Alcohol | Negative | ⋮ |
| <input type="checkbox"/> | 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**.

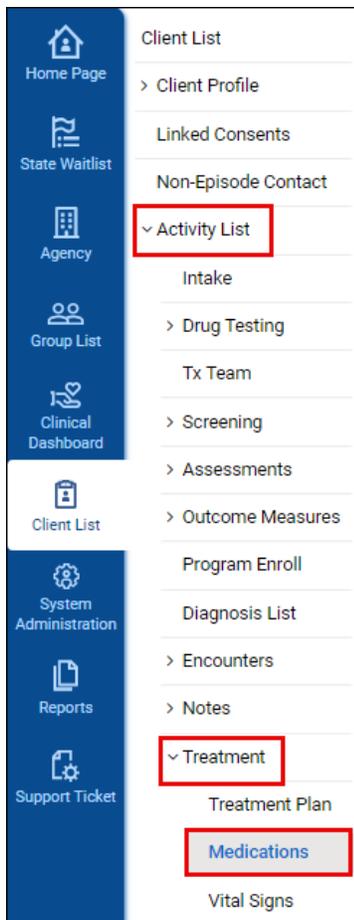


Figure 134: Accessing Medications

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

Medications List for Reyes, Jaime

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 <input type="text"/> | Medication <input type="text"/> |
| Indication For Use <input type="text"/> | |
| Dose <input type="text"/> | Frequency <input type="text"/> |
| PRN <input type="radio"/> Yes <input checked="" type="radio"/> No | Route <input type="text"/> |
| Date Prescribed <input type="text" value="1/18/2024"/> | Date Discontinued <input type="text"/> |
| Staff Prescriber <input type="text"/> | Non Staff Prescriber <input type="text"/> |
| Pharmacy Used <input type="text"/> | Fulfillment Instructions <input type="text"/> |
| Number Refills <input type="text"/> | Transmitted <input type="text"/> |
| Notes <small>(including identification and documentation of drug relations and instructions for use)</small> <input type="text"/> | |
| <input type="button" value="Save"/> <input type="button" value="Save and Finish"/> <input type="button" value="× 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**.

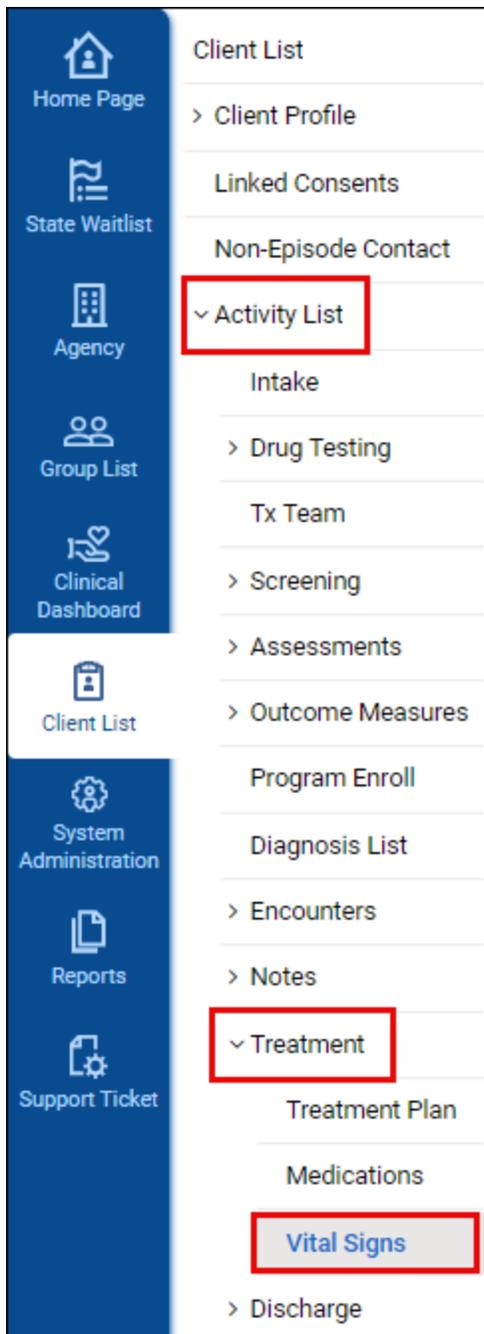


Figure 137: Accessing Vital Signs

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

| | | |
|---|--|---|
| <p>Height <input type="text"/> In.</p> | <p>Weight <input type="text"/> Lbs.</p> | <p>BMI <input type="text"/> Calculate BMI</p> |
| <p>BMI Percentile (2-20 years) <input type="text"/> %</p> | <p>Pulse <input type="text"/> min</p> | <p>Resp <input type="text"/> min</p> |
| <p>O2 Sat <input type="text"/> %</p> | <p>Temp <input type="text"/> F</p> | <p>Waist Circumference <input type="text"/> in.</p> |
| <p>Blood Pressure (systolic/diastolic) <input type="text"/> / <input type="text"/> mmHg</p> | <p>Weight-for-length Percentile (Birth - 36 months) <input type="text"/> %</p> | <p>Head Occipital-Frontal Circumference Percentile (Birth - 36 months) <input type="text"/> %</p> |
| <p>Date Taken <input type="text"/></p> | <p>Time Taken On <input type="text"/></p> | <p>Additional comments <input style="width: 100%; height: 60px;" type="text"/></p> |
| <p>Taken by <input style="width: 100%;" type="text"/></p> | | |
| <p>Created By <input style="width: 100%;" type="text"/></p> | <p>Updated By <input style="width: 100%;" type="text"/></p> | |

Finish

Figure 138: Vital Signs Profile

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

Vital Signs Profile

| | | |
|---|--|---|
| Height <input type="text"/> In. | Weight <input type="text"/> Lbs. | BMI <input type="text"/> Calculate BMI |
| BMI Percentile (2-20 years) <input type="text"/> % | Pulse <input type="text"/> min | Resp <input type="text"/> min |
| O2 Sat <input type="text"/> % | Temp <input type="text"/> F | Waist Circumference <input type="text"/> in. |
| Blood Pressure (systolic/diastolic) <input type="text"/> / <input type="text"/> mmHg | Weight-for-length Percentile (Birth - 36 months) <input type="text"/> % | Head Occipital-Frontal Circumference Percentile (Birth - 36 months) <input type="text"/> % |
| Date Taken <input type="text" value="1/19/2024"/> | Time Taken On <input type="text" value="8:47 AM"/> | Additional comments <div style="border: 1px solid gray; height: 60px; width: 100%;"></div> |
| Taken by <input type="text" value="Wilson, Scott"/> | | |
| Created By <input type="text"/> | Updated By <input type="text"/> | |

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**.

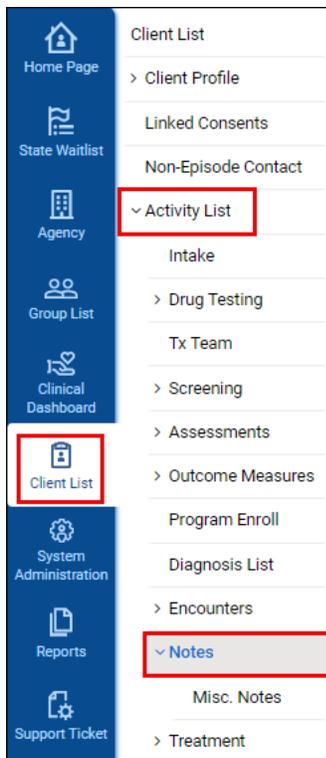


Figure 140: Accessing Notes

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.

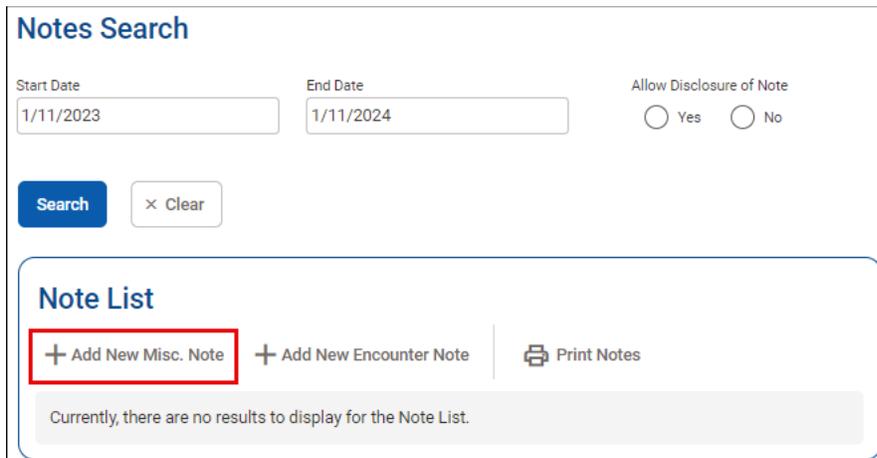


Figure 141: Add Misc Note

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.

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

Client Search

Facility First Name Last Name Unique Client Number

Search **Advanced Search**

Client List

+ Add Client

| 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 | <input type="button" value="Review"/> <input type="button" value="Edit"/> |

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.

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



Figure 146: Accessing Clinical Dashboard

2. The Clinical Dashboard screen will display.
 - a. Perform a search as needed to filter results on this screen.
 - b. 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**.

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 | Reyes, Jaime | | 1/10/2024 | 1/11/2024 | 2/10/2024 | ,Ambulatory-Intensive-Outpatient, | | | | Lead, Treat |
| 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**.

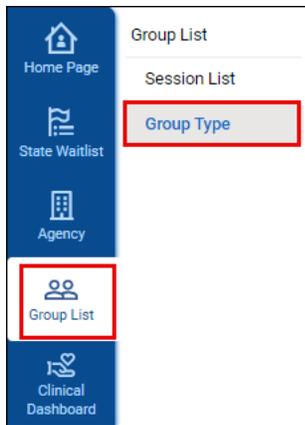


Figure 149: Accessing Group Type

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.

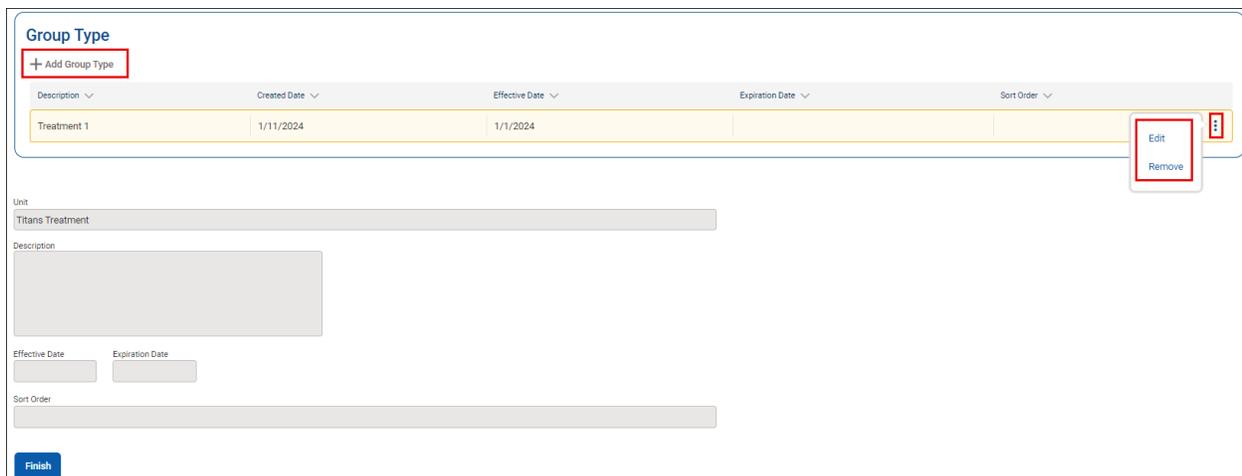


Figure 150: Group Type Actions

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.

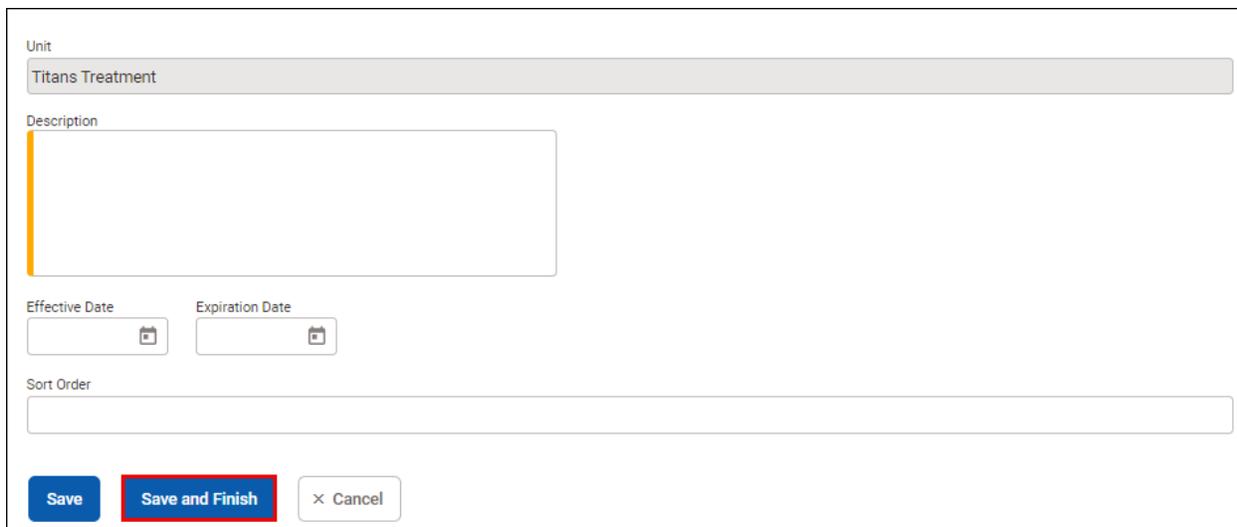


Figure 151: Group Type Fields

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**.

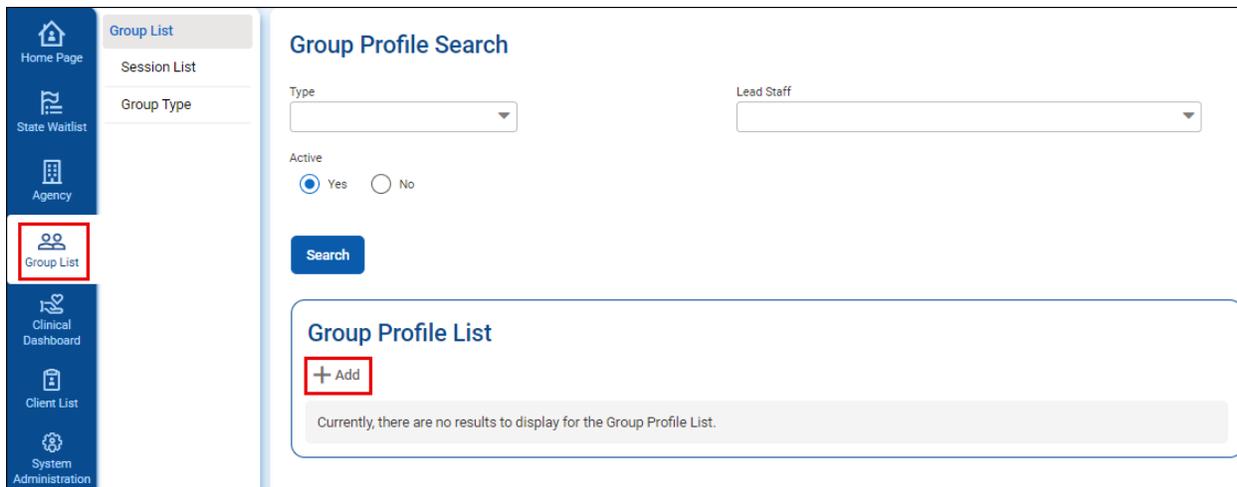


Figure 152: Accessing Group List

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

Program

of Sessions Approved Status # of Sessions Attended

Status Effective Date Client Due Reason

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 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 | |

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
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
x Cancel

Attendees

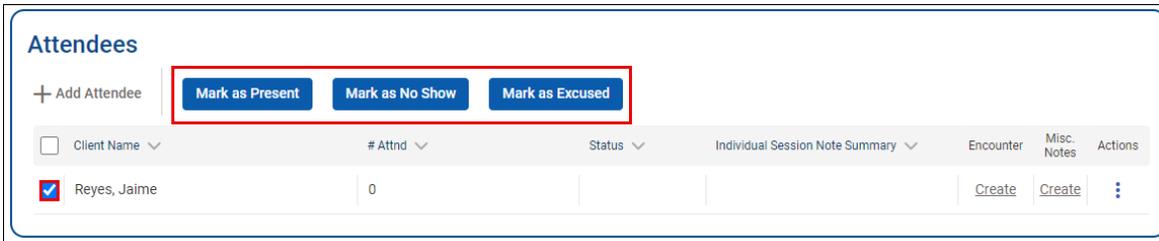
+ Add Attendee
Mark as Present
Mark as No Show
Mark as Excused

| <input type="checkbox"/> Client Name | # Attn | Status | Individual Session Note Summary | Encounter | Misc. Notes | Actions |
|--|--------|--------|---------------------------------|-----------|-------------|---------|
| <input type="checkbox"/> 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

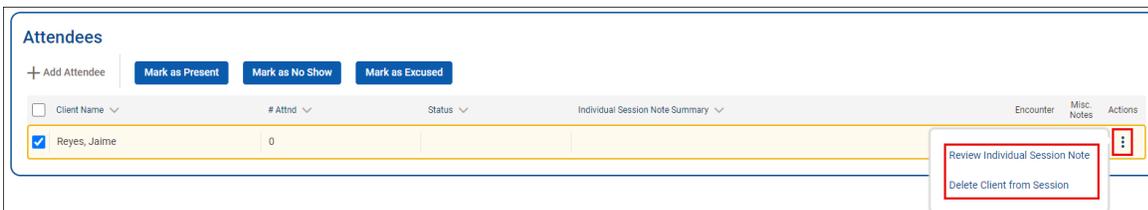
+ Add Attendee

Mark as Present Mark as No Show Mark as Excused

| <input type="checkbox"/> | Client Name | # Attnd | Status | Individual Session Note Summary | Encounter | Misc. Notes | Actions |
|-------------------------------------|--------------|---------|--------|---------------------------------|-----------|-------------|---------|
| <input checked="" type="checkbox"/> | 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

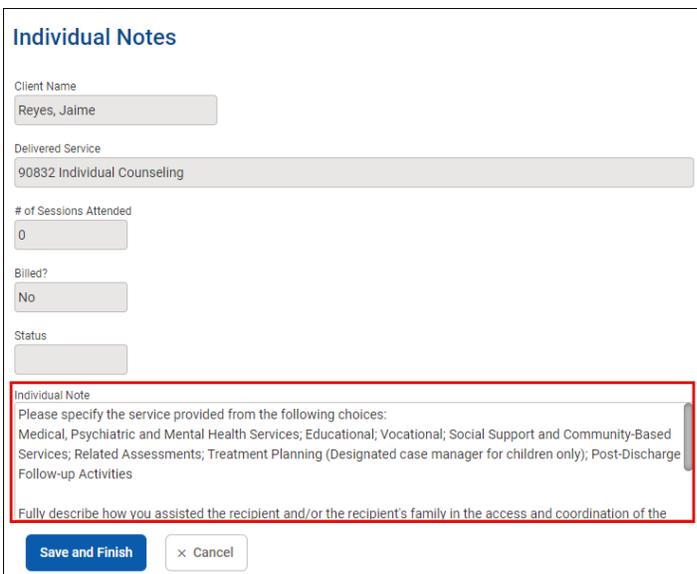
Mark as Present Mark as No Show Mark as Excused

| <input type="checkbox"/> | Client Name | # Attnd | Status | Individual Session Note Summary | Encounter | Misc. Notes | Actions |
|-------------------------------------|--------------|---------|--------|---------------------------------|-----------|-------------|---------|
| <input checked="" type="checkbox"/> | 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.

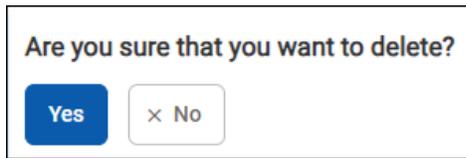


Figure 163: Verify Client Removal

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

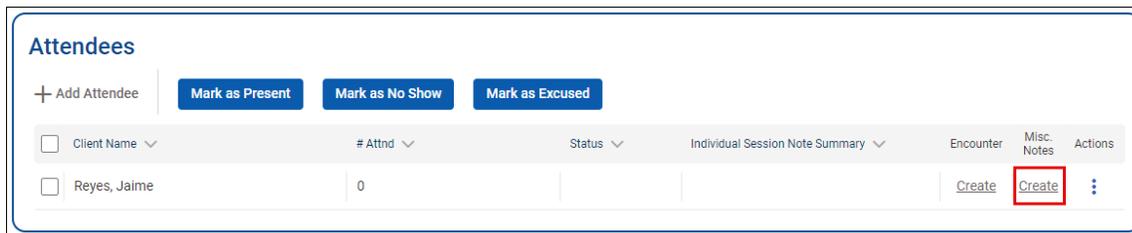


Figure 164: Create Misc Note

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

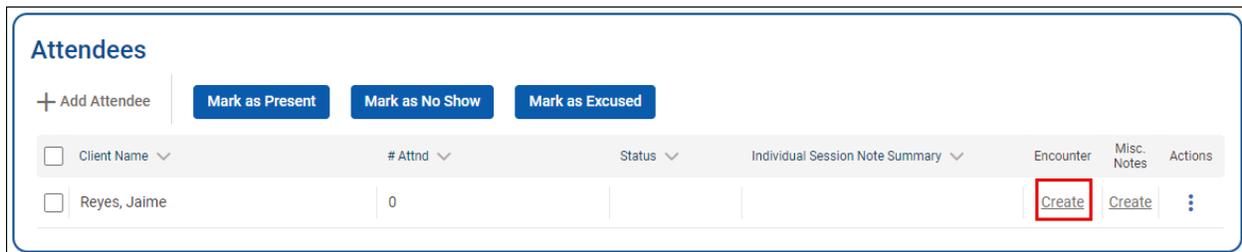


Figure 165: Create Encounter

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**.

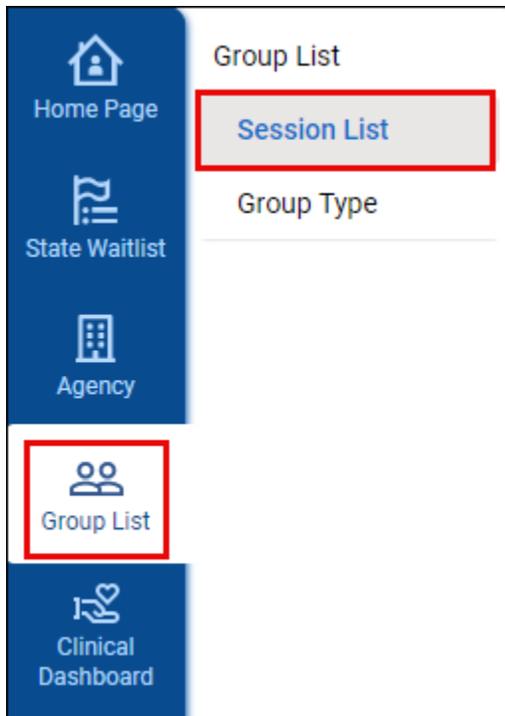


Figure 166: Accessing Session List

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.

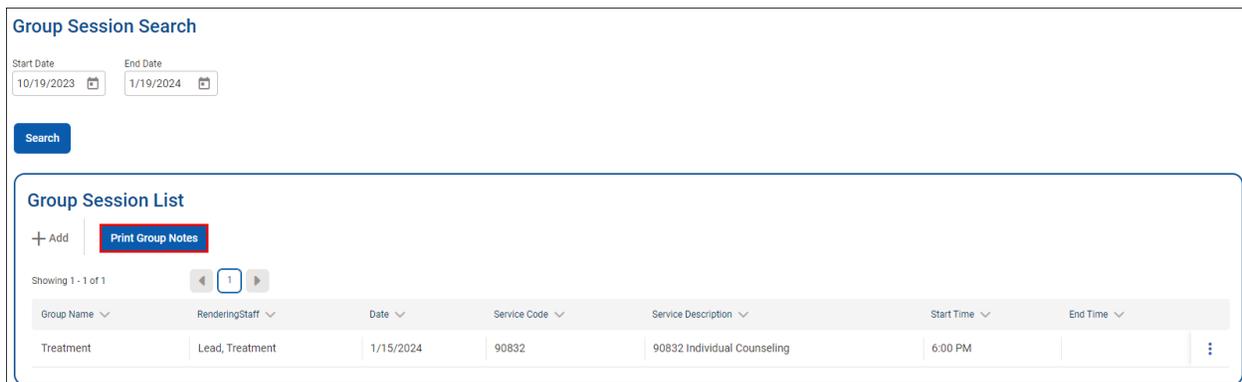


Figure 167: Group Session Screen

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 |
| ASAIS | 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. |