FEI Systems

WITS

Standard SOR WITS Admin Guide_Release 19.9

Standard SOR WITS Administrator User Guide

Applies to:

WITS Version 19.9.0

WITS Customers

Last Updated January 2020

Version 4

WITS Customers

State Opioid Response (SOR) Grant

Preface

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

Intended Audience

This Standard SOR user guide has been prepared for provider agency staff members delivering SOR services to individuals. Information included will assist providers in understanding the standard WITS SOR system and the data entry requirements for the SOR grant.

Note: Screen captures, and other information included in this Standard SOR user guide may differ based on the settings established for your Training and/or Production site(s).

System Requirements

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

Internet Browsers

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

- Apple® Safari®
- Google Chrome™
- Mozilla® Firefox®
- Windows Internet Explorer 10 or newer *(recommended)*

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

Pop-up Blocker

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

Customer URL Links

Training Site: Click or tap here to enter text.

Production Site: Click or tap here to enter text.

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

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

Documentation Updates

Version 4 (WITS 19.9.0) (Current version)

The following topics have been added in this documentation version.

- **Alerts** (Part 2: Agency Administration on page 18)
- **Prepopulate Behavioral Health Diagnoses screen with Medications from Encounter** (Part 5: Code Table Reference (SOR Grant) on page 68 and on page 74)
- **View GPRA Follow Up Compliance Role** (Part 4: Staff Management on page 55)
- **GPRA Interview Compliance Details** (Part 1: State Opioid Response (SOR) in WITS on page 5)
  - GPRA Follow-up Due Summary Screen
  - GPRA Follow-up Due Detail Screen
- **GPRA Discharge Due Screen** (Part 1: State Opioid Response (SOR) in WITS on page 11)

Version 3 (WITS 19.8.0)

The following topics have been added in this documentation version.

- Added information about **mapping Services to GPRA Service** (Part 5: System Administration on page 88)
- Added information about **mapping Modality type to GPRA Modality** (Part 5: System Administration on page 64)

Version 2 (WITS 19.6.0)

The following topics have been added in this documentation version.

- **Updated Standard SOR Workflow Diagram** (Part 1: State Opioid Response (SOR) in WITS on page 1)
- **Grant Episode Concepts** (Part 1: State Opioid Response (SOR) in WITS on page 3)
- **SPARS Upload** (Part 5: System Administration on page 91)
- **WITS Reports Module** (Part 6: Reports on page 95)
  - GPRA Interview Report
- **SSRS Reports** (Part 6: Reports on page 98)
  - SOR Program Report
  - Grant Episode Details Report

Contents

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

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

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

Part 1: State Opioid Response (SOR) in WITS

Standard SOR Process Workflow Diagram

The following diagram illustrates the standard SOR workflow process; however, workflow processes may differ based on individual implementations.

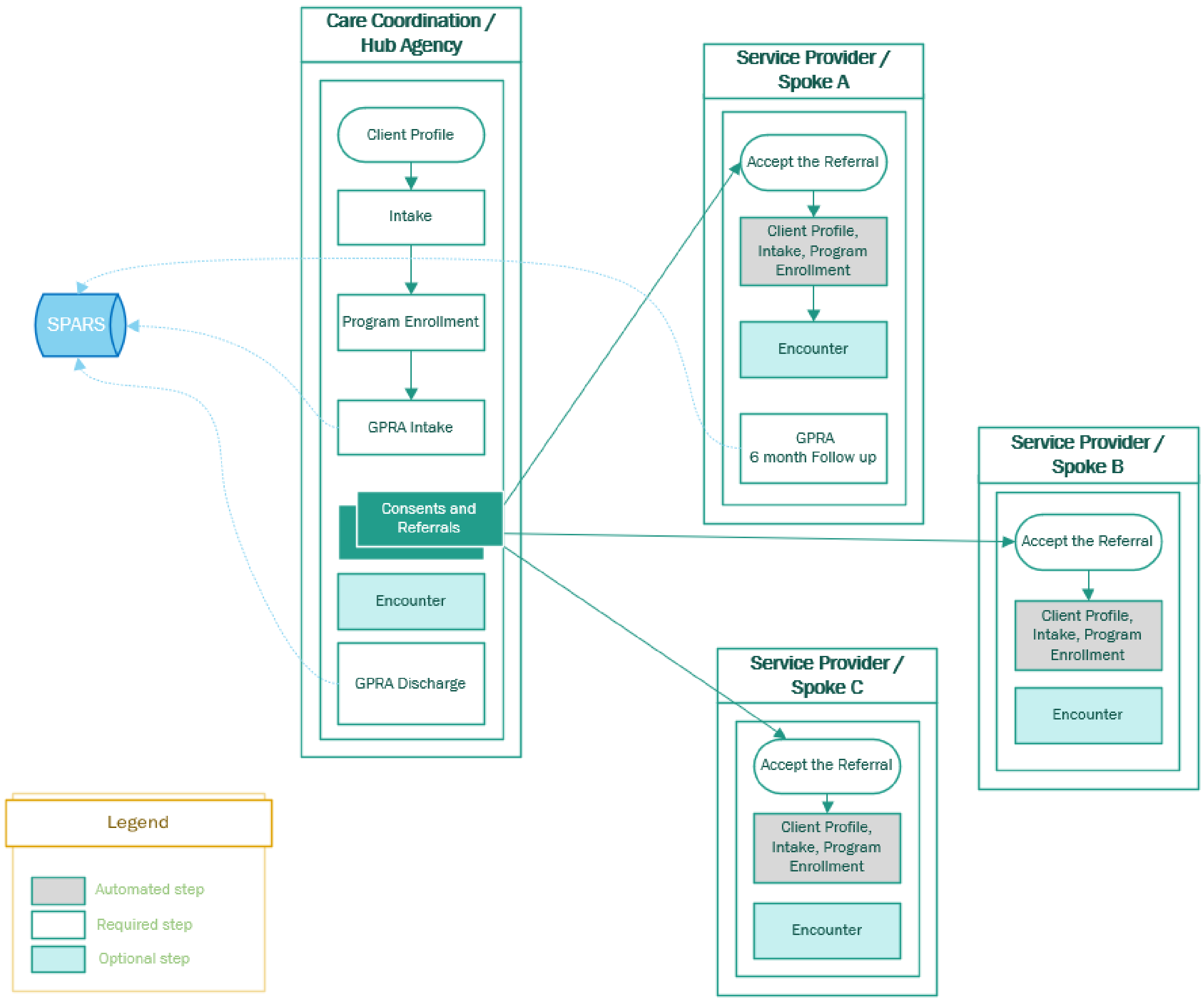


Figure 1-1: Standard SOR Workflow Diagram

WITS Structure Definitions

1. **Agency:** The legal entity that a provider operates within. Some people refer to this as 'Provider'.

2. **Facility:** The physical location (building) that an Agency/Provider uses to provide services. A provider can have more than one facility within a single building.

3. **Program:** The defined plan of treatment or grouping of services for a given set of individuals, equated with a modality and/or level of care. (e.g., MAT or Intensive Outpatient or Prevention).

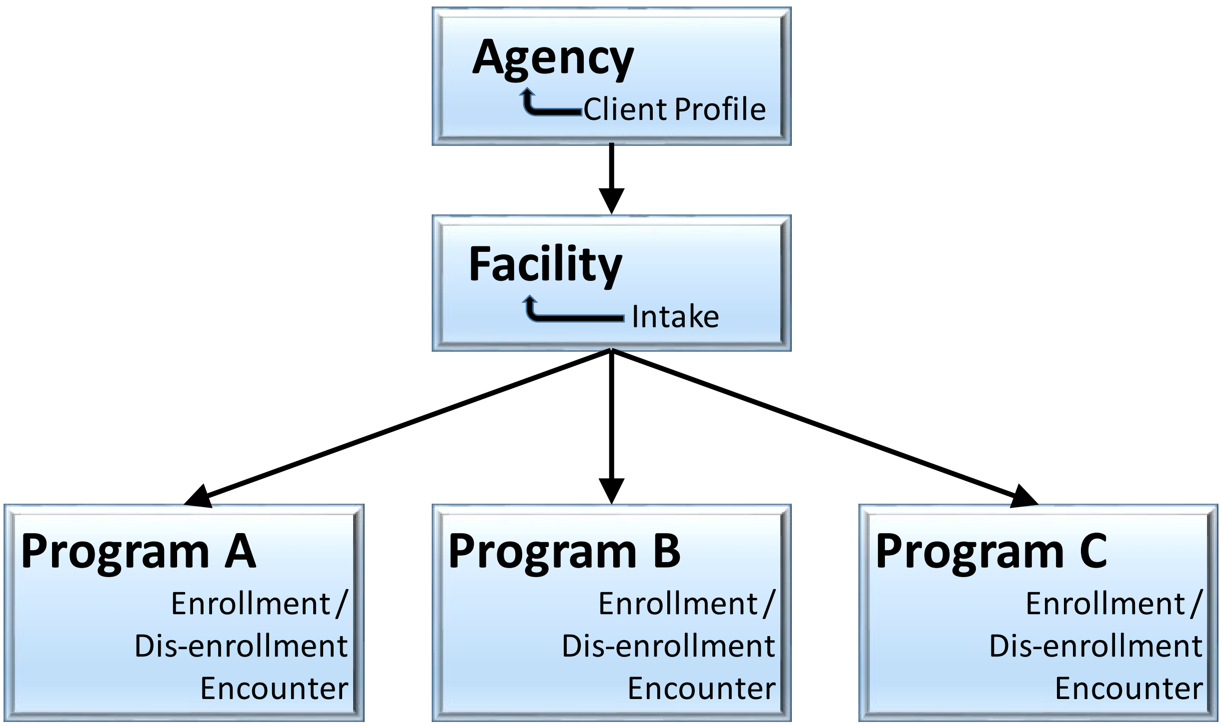


Figure 1-2: WITS Structure Overview

Grant Episode Concepts

***Where:* Agency > Agency List > Facility List > Programs**

Background

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

Grant Episode Concepts

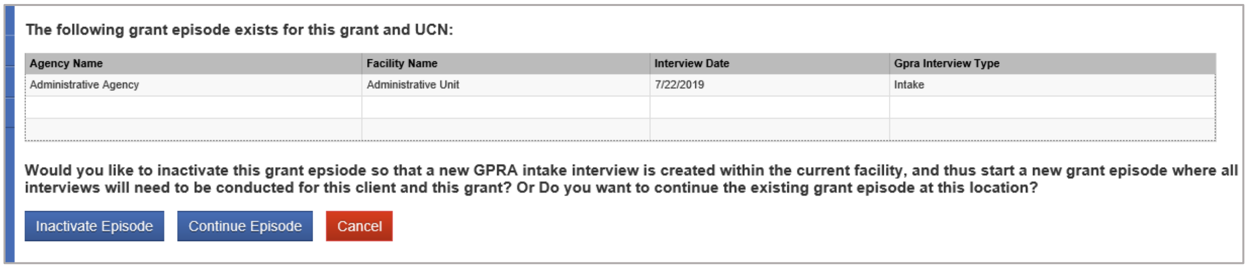
Table 1-1: Grant Episode Events and Information

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

WITS Administrator Process

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

1. If the client goes to another provider who attempts to add a Client Program Enrollment in SOR and that client/UCN already has an 'active' grant episode, the system will prohibit this.
    - The provider/user will be presented with a WITS error message to contact their WITS Administrator.
2. The WITS Administrator would then be able to determine if the client program enrollment can be added within the agency by either continuing the existing episode or creating a new episode (which will inactivate the previous episode)
3. The WITS Administrator would see the following message:

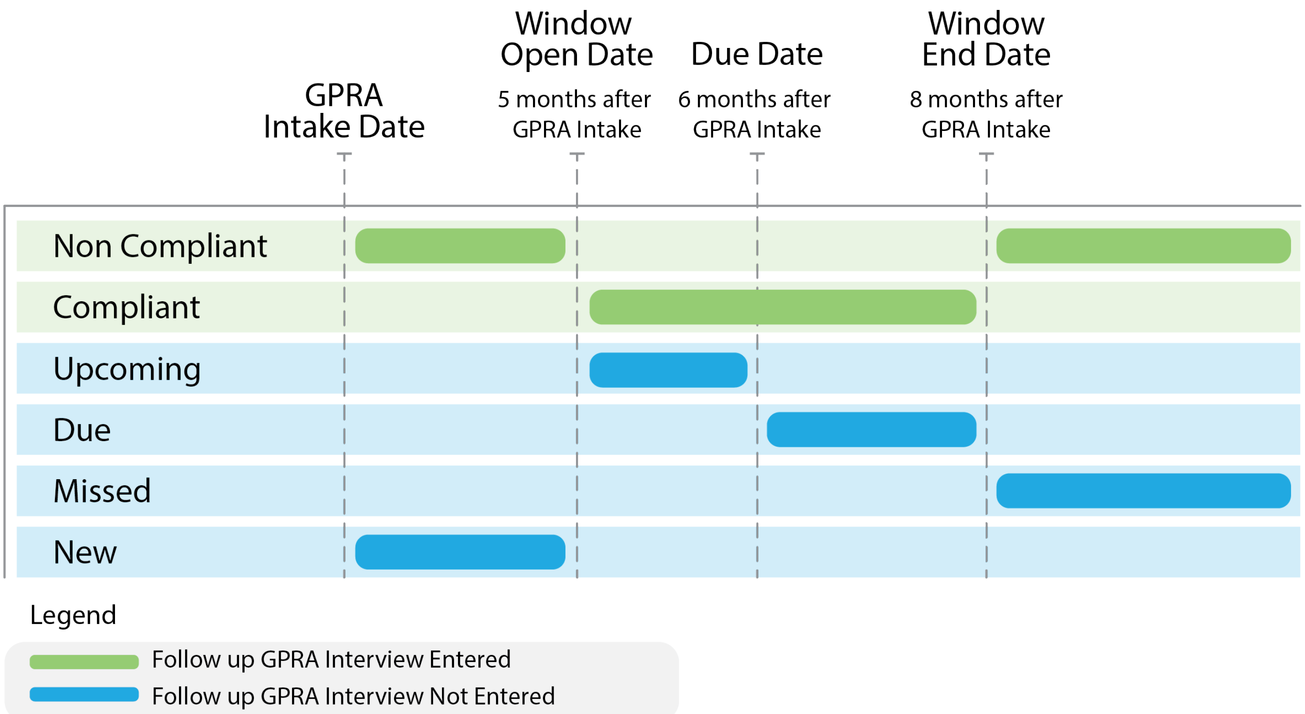


4. The WITS Administrator can then choose to 'Inactivate Episode' or 'Continue Episode.'

GPRA Interview Compliance Details

Grant Requirement

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



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

Figure 1-2: GPRA Follow-up Due Diagram

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

Table 1-2: Follow up Attendance Definitions

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

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

GPRA Follow-up Due Summary Screen

Where: Agency > GPRA Follow-up Due Summary

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

The search results will display a distinct count of GPRA interviews for each follow-up status available at the time of searching. For definitions of each status, see *Table 1-2: Follow up Attendance Definitions* on page 5 above.

Table 1-3: GPRA Follow-up Due Summary Screen Search Filters

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

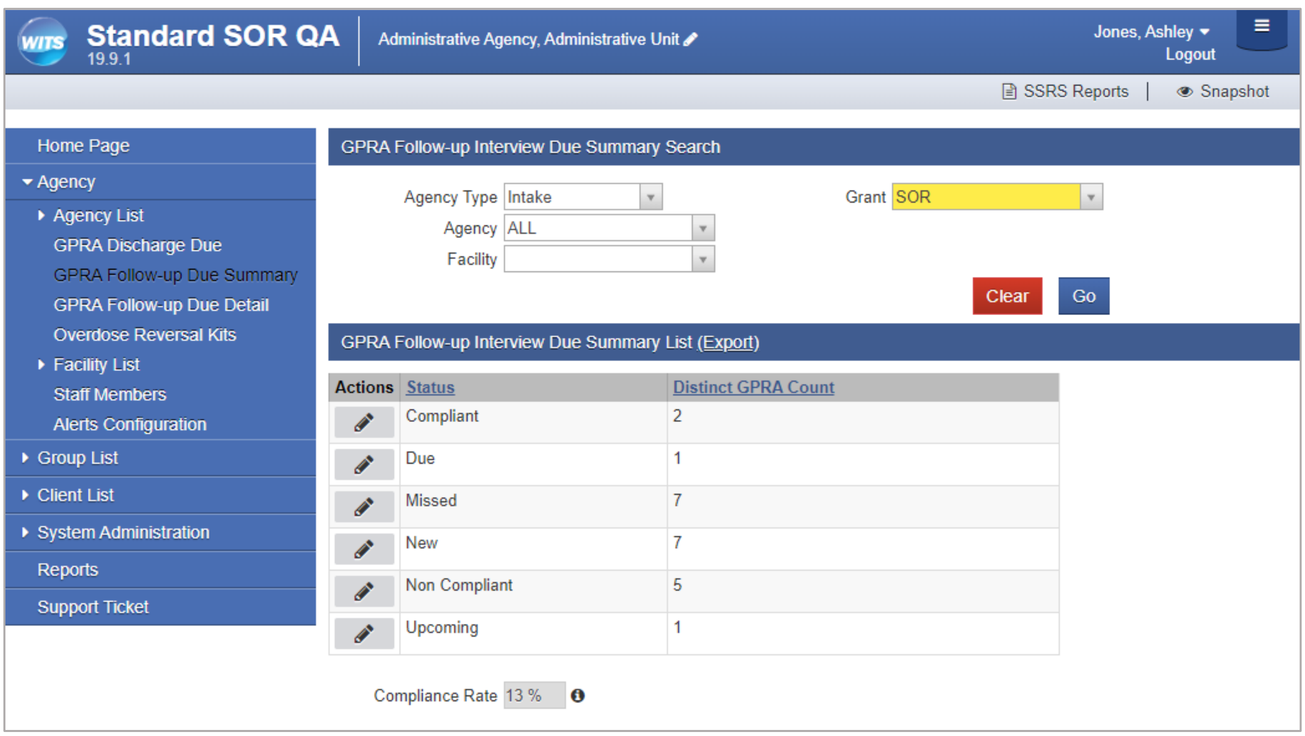


Figure 1-3: GPRA Follow-up Due Summary screen

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

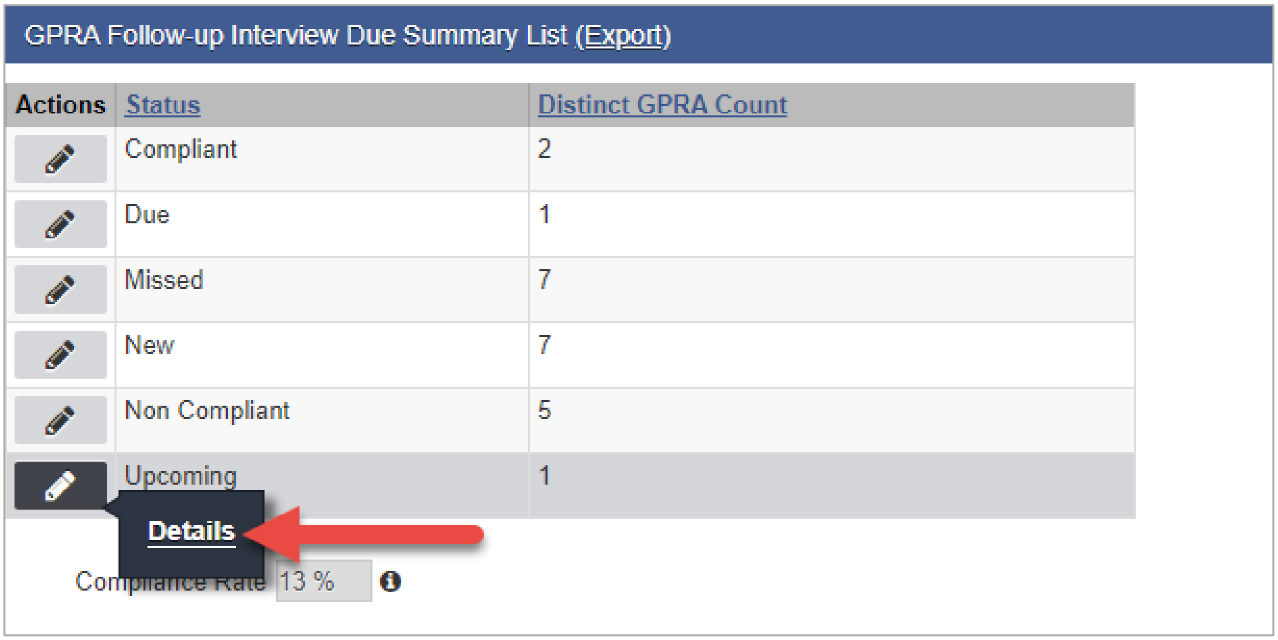


Figure 1-4: GPRA Follow-up Interview Status List, Details link

GPRA Follow-up Due Detail Screen

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

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

Table 1-4: GPRA Follow-up Due Detail Screen Search Filters

Field	Description
Agency Type	In the **Agency Type** search field, the option "**Intake**" represents the agency where the GPRA Intake Interview was conducted. The option, "**Follow-up**" represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be prepopulated with the SOR grant.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.
Status	The **Status** search field will filter the list of clients corresponding to a specific compliance status. For definitions of each status, see *Table 1-2: Follow up Attendance Definitions* on page 5 above.

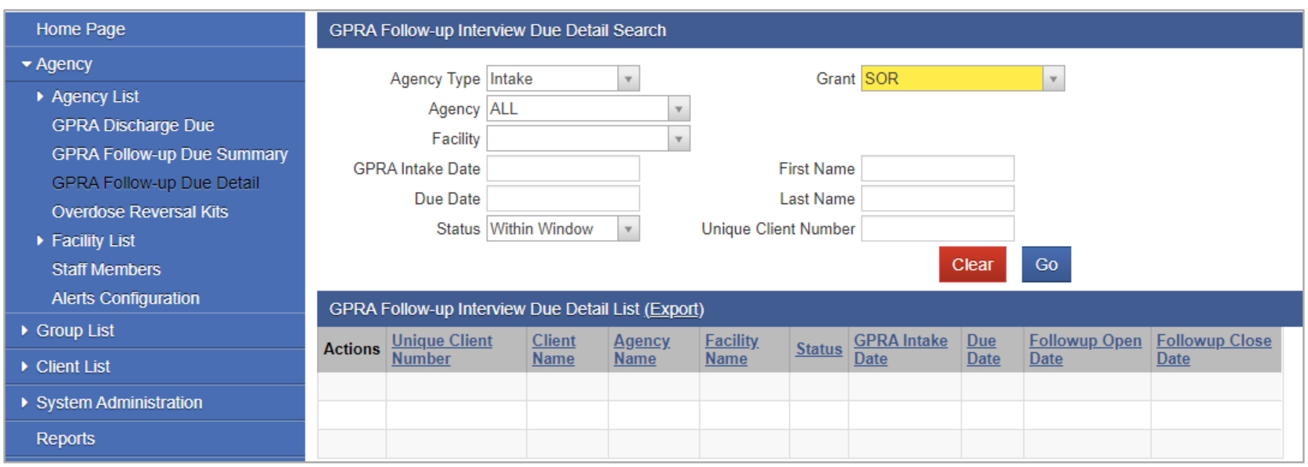
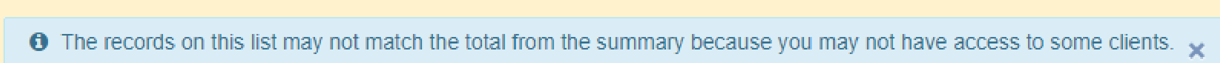


Figure 1-5: GPRA Follow-up Due Detail screen

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

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



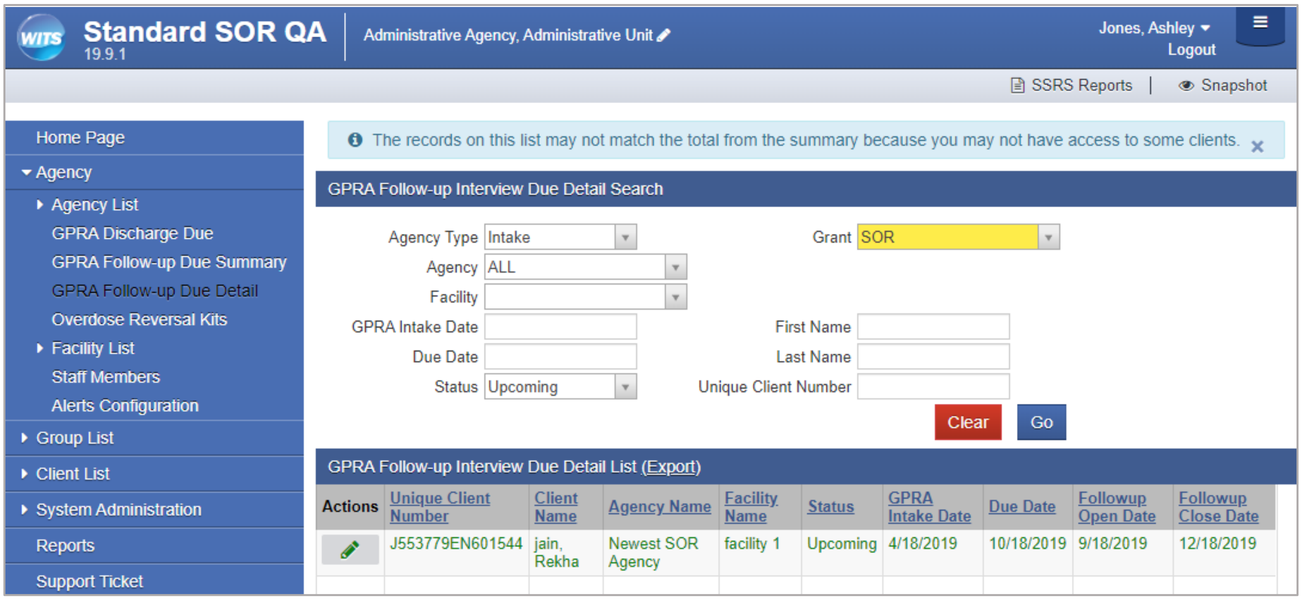


Figure 1-6: GPRA Follow-up Due Screen, pre-populated based on Summary screen selections

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

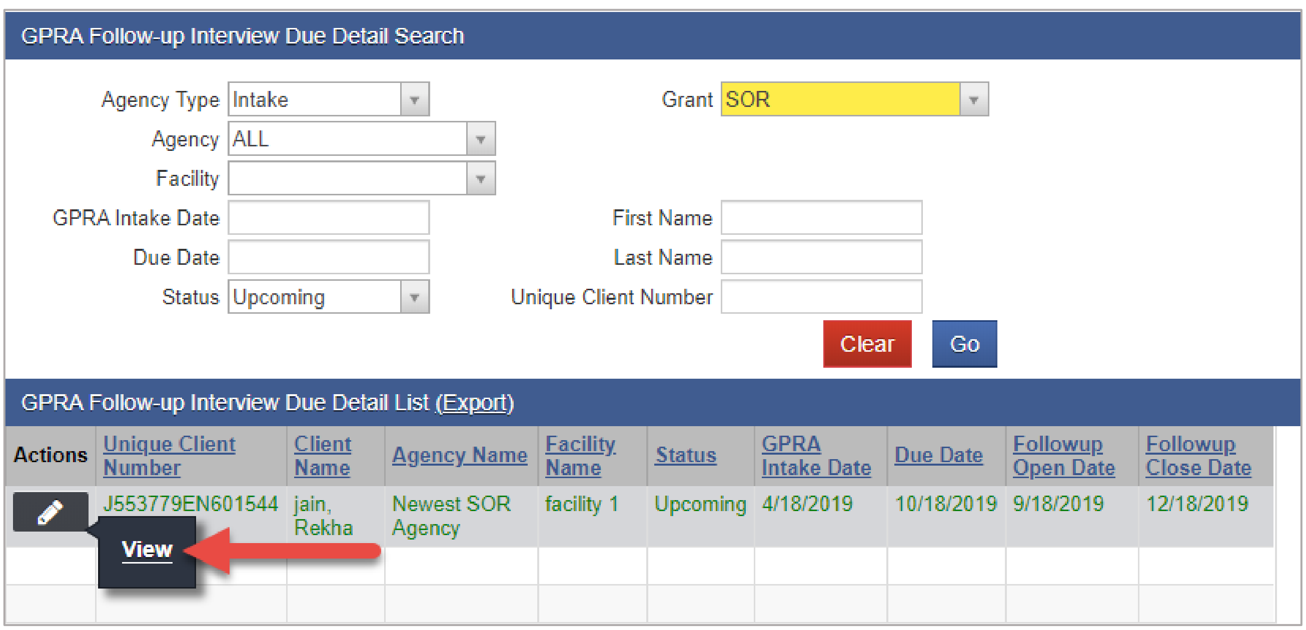


Figure 1-7: GPRA Follow-up Due Detail, View link

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

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

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

GPRA Discharge Due Screen

Where:* *Agency* > *GPRA Discharge Due

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

Table 1-5: GPRA Discharge Due Screen Search Filters

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

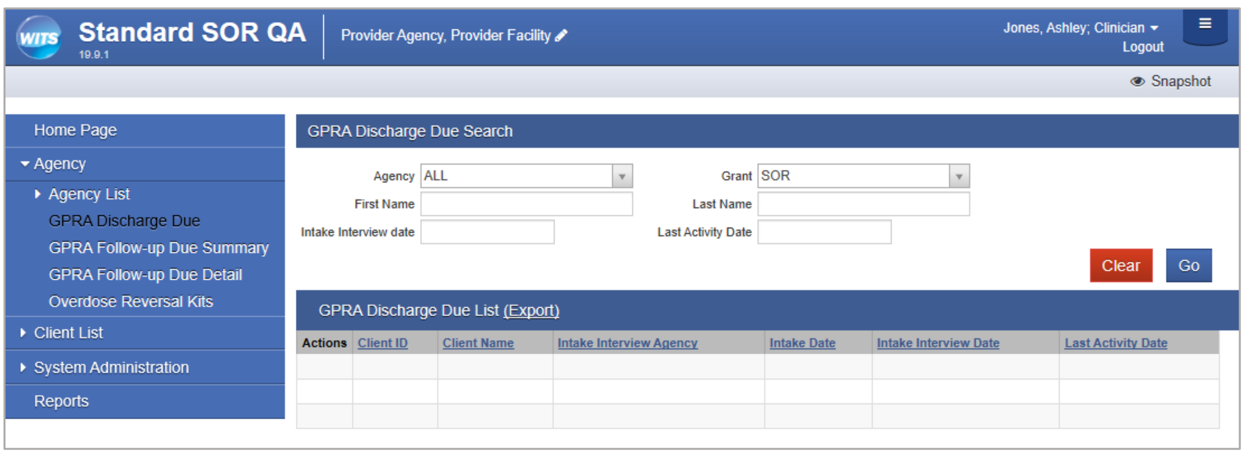


Figure 1-8: GPRA Discharge Due Screen

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

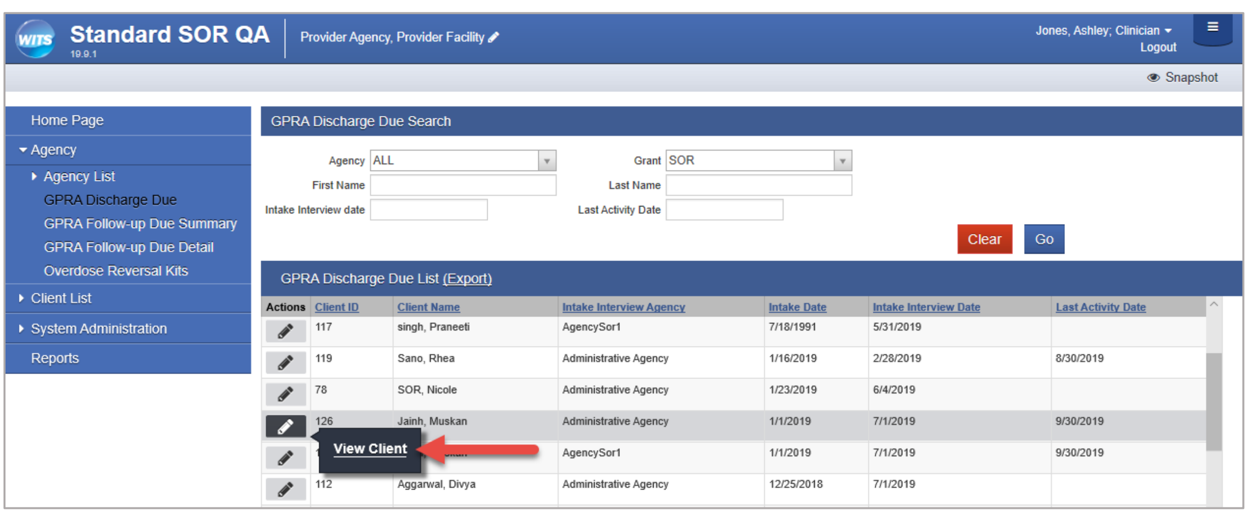


Figure 1-9: GPRA Discharge Due screen, View Client link

Part 2: Agency Administration

Agency Profile

***Where:* Agency > Agency List > Agency Profile**

WITS Administrators are responsible for adding new Agency records to the system. When creating an agency, only the Agency Profile and Address are required to save the agency record. Additional agency information can be added and updated later as needed. WITS Administrators can also designate other staff members to assist with other agency-level responsibilities.

To create a new agency record, follow the steps below.

1. On the left menu, click **Agency** and then click **Agency List**.
2. Click the **Add New Agency Record** link.

Figure 2-1: Agency List screen

3. On the **Agency Profile** screen, enter the information as shown in the table below.

Table 2-1. Agency Profile Fields

Field Name	Description
Agency Name	Type the agency's name.
Display Name	The agency's display name will appear in drop-down menus throughout the system and should be meaningful to all staff members; this field will automatically copy the first 15 characters from the "Agency Name" field but this information can be edited. **Note**: There is a 15-character limit for this field.
Agency Type	Select from the drop-down menu.
Contract Role	Select "Provider".
County	Select from the drop-down menu.
Domains	For SOR, select the Substance Abuse domain.

Note: Typically, the agency named "Administrative" is reserved to house staff from FEI who support the State's WITS instance (e.g. FEI Production Support, FEI Account Manager). State staff will be listed in the State named agency.

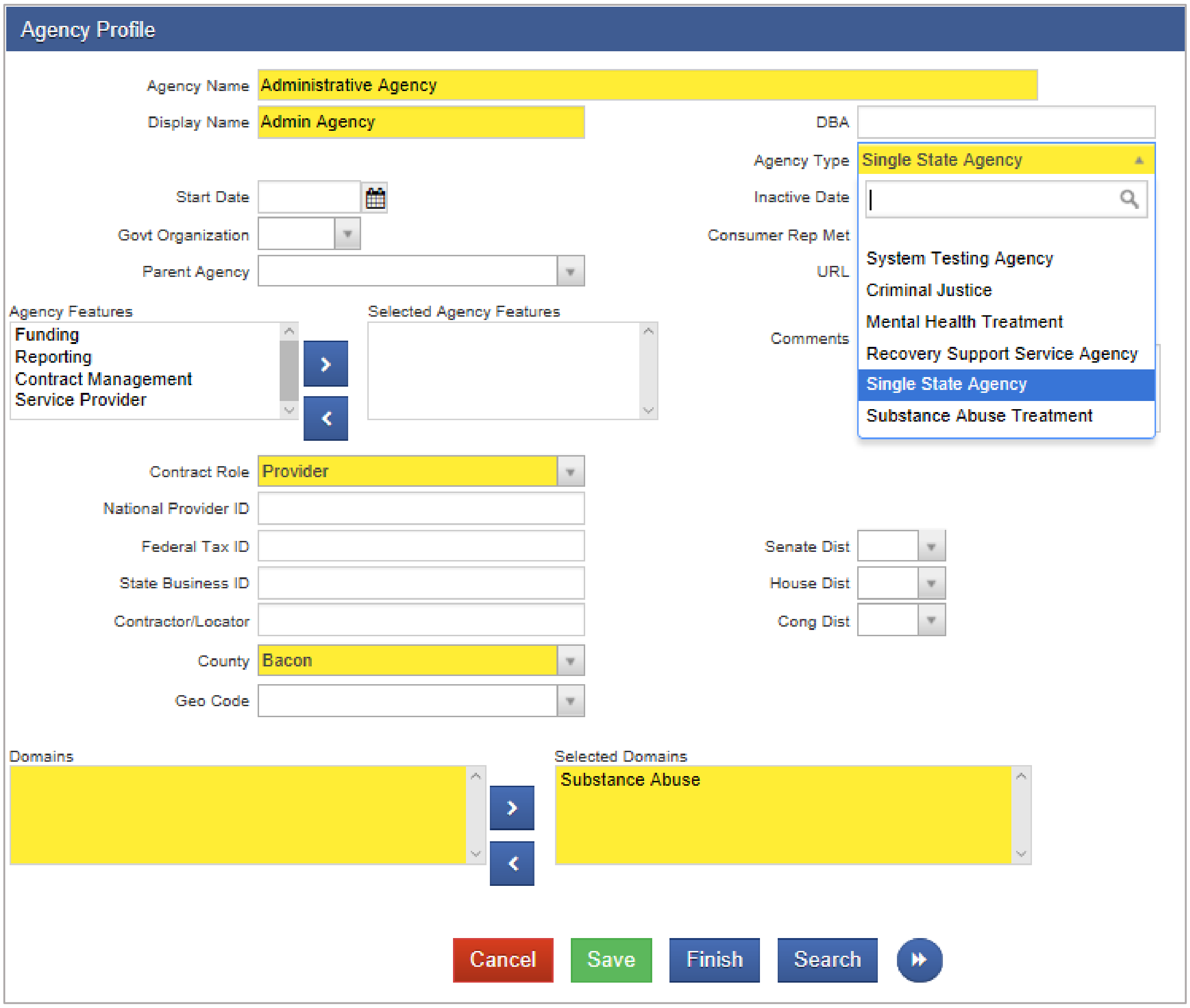


Figure 2-2: Agency Profile screen

4. When complete, click the **right-arrow button**.
5. Click the **Add Address** link.

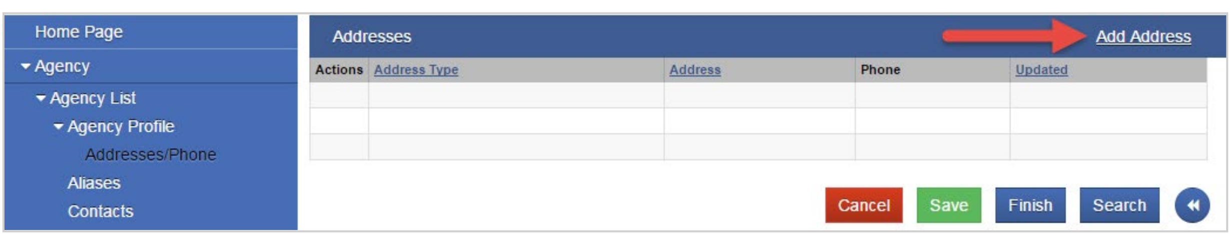


Figure 2-3: Address/Phone List screen

6. On the **Address Information** screen, enter the required information.

Table 2-2: Address Information Fields

Field	Description
Address Type	Select from the drop-down menu.

Field	Description
Confidential	This field defaults to "No"; update if applicable.
Address Line 1	Type the first address line.
Address Line 2	Type the second address line, if applicable.
City	Type the city name.
State	Select state from the drop-down menu.
Zip	Type the zip code.

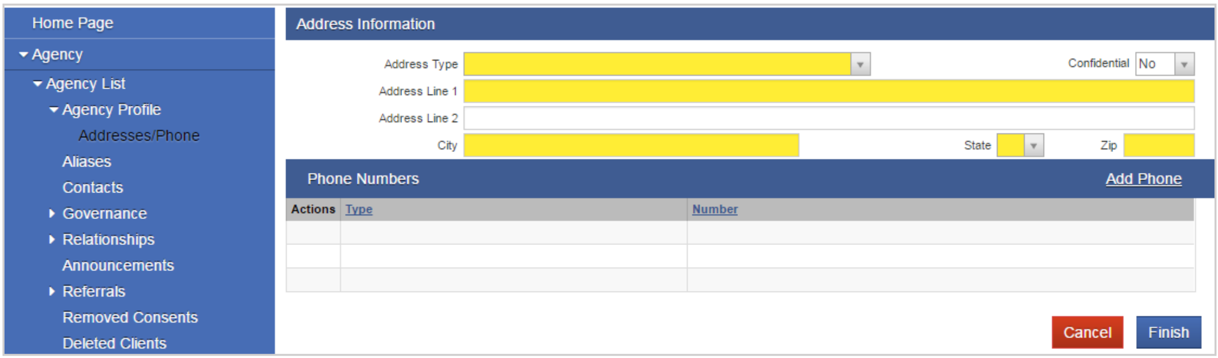


Figure 2-4: Address Information screen

7. If available, add a telephone number by clicking the **Add Phone** link. Then click **Finish**.

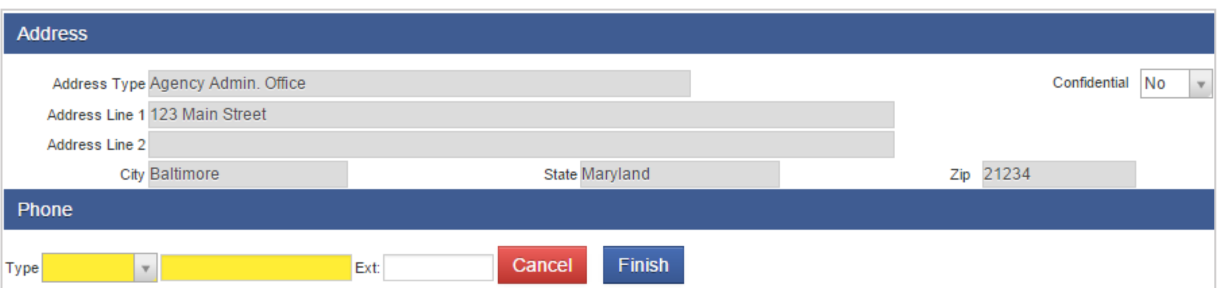


Figure 2-5: Add Phone Number

8. The new address will appear on the Addresses screen. Click **Save** and then click **Finish**.

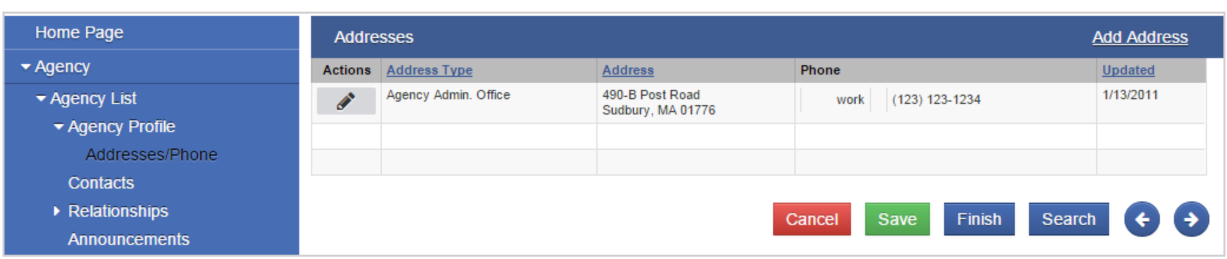


Figure 2-6: Address/Phone screen

9. On the **Agency Profile** screen, click **Save** and then click **Finish**.

Agency Disclosure (Optional)

***Where:* Agency > Agency List > Relationships > Disclosure**

WITS allows client information to be consented or "shared electronically" within the system. This is accomplished through creating a consent record for individual clients, so that when a client is referred to another agency, information listed within the consent record will be shared with that other agency. It can be very repetitive for staff members to create these consent records on a client-by-client basis. To help staff members create consistent consent records, each Agency should set up its own Agency Disclosure. This establishes a template for Consent. A global disclosure policy can be created for all agencies, or a separate disclosure agreement can be created for each agency. For more information about WITS and 42CFR Part 2 compliance, see the Consents section in the End User documentation.

1. On the left menu, click **Agency**, then click **Relationships**, and then click **Disclosure**.
2. Click **Add Agency Disclosure Domain Record**.

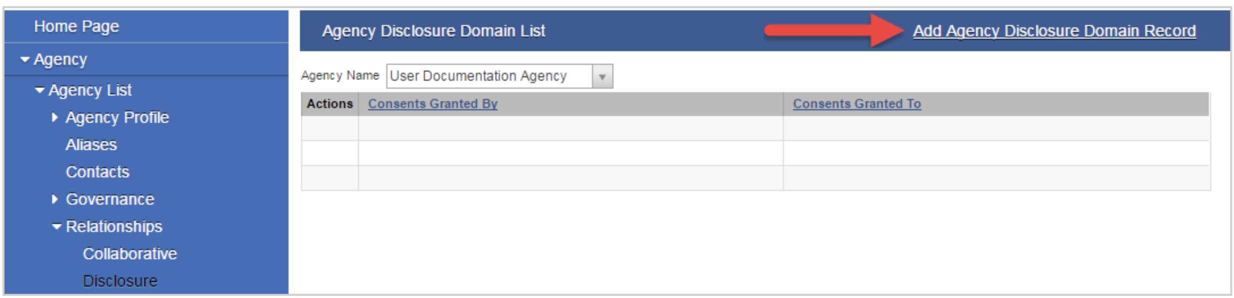


Figure 2-7: Agency Disclosure Domain List screen

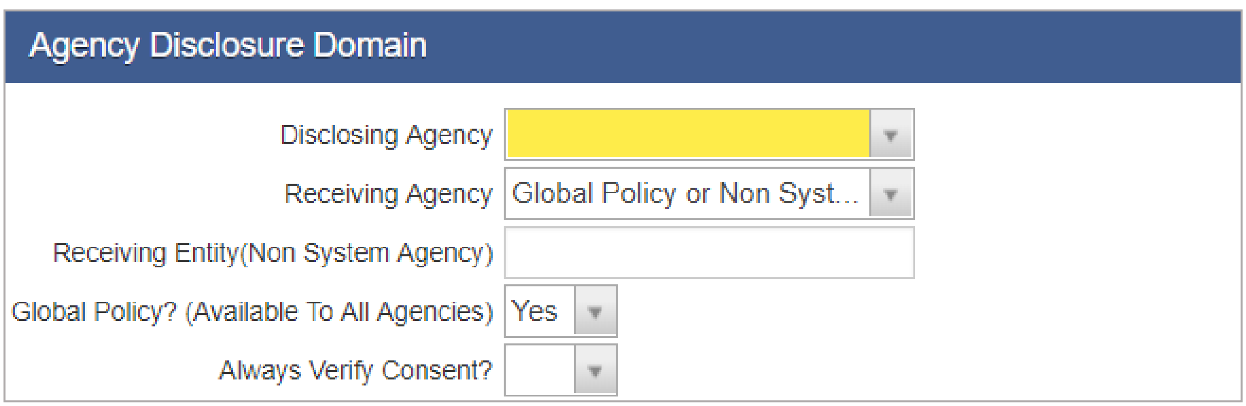


Figure 2-8: Agency Disclosure Domain section

3. In the **Agency Disclosure Domain** section, enter the following:

Table 2-3: Agency Disclosure Domain fields

Field	Description
Disclosing Agency	Select the name of your agency from the drop-down menu.
Receiving Agency	Select "Global Policy or Non System", or select an individual agency name. The "Global Policy" will apply this consent template to any agency in WITS. If an individual agency is selected, the consent template will apply only to that agency.

Field	Description
Receiving Entity (Non System Agency)	If this disclosure agreement applies to an agency outside of WITS, type that agency's name in this field.
Global Policy? (Available To All Agencies)	Select Yes or No.
Always Verify Consent	Select Yes or No. This serves as a visual reminder to the person creating the consent.

4. In the **Disclosure Domain Selection** section, enter the following:

Field	Description
Expiration Type and **+ Days**	Select either "Discharge (UD)" or "Date Signed (DS)", then when the yellow field appears, enter the number of days the consent will expire.
Consent Options	Click on the desired options, and then move the selections to the Selected Options box using the mover buttons. When staff members create client-specific consent records, these options will automatically populate.

5. When complete, click **Finish** to complete and save the disclosure record.

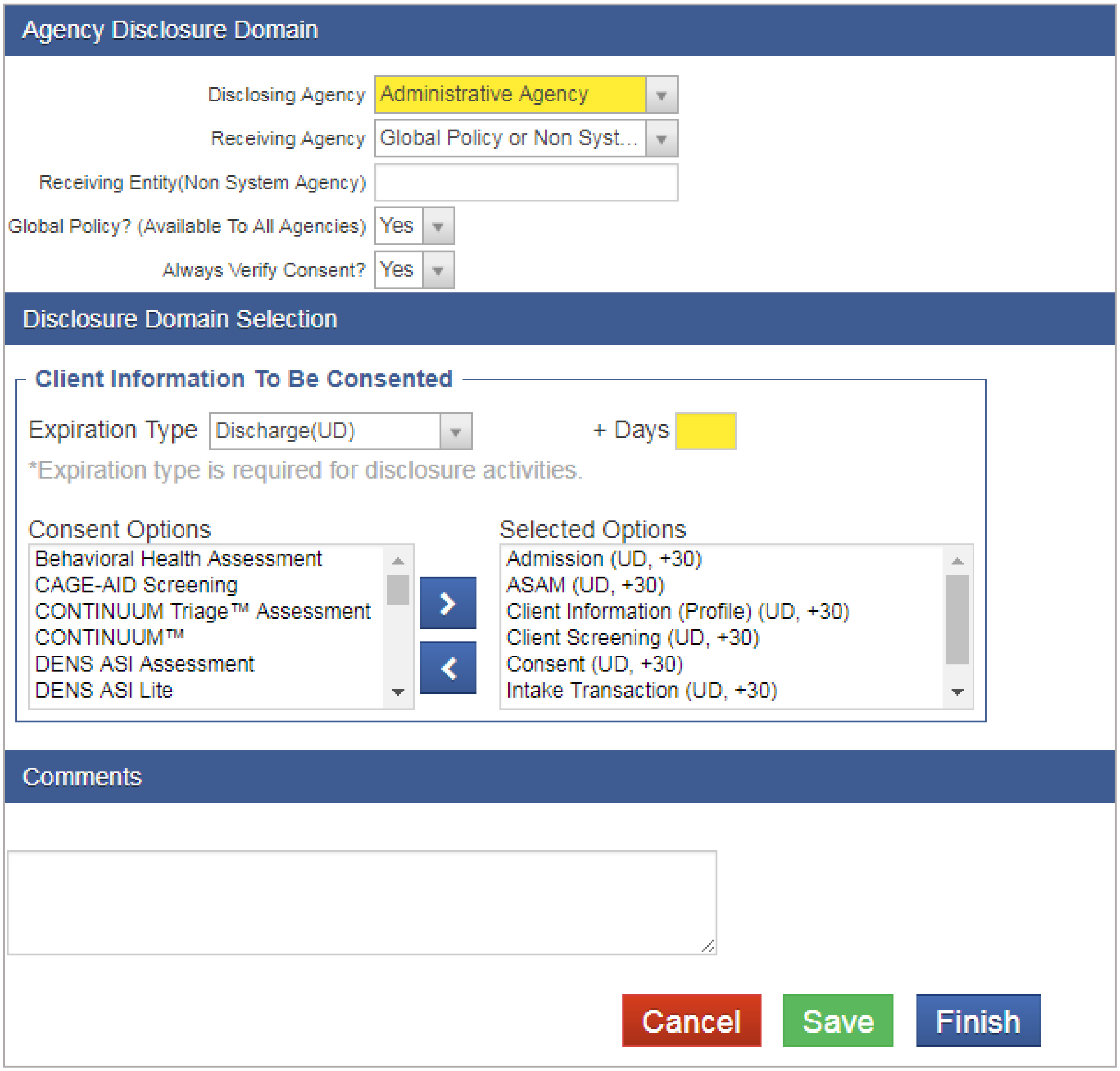


Figure 2-9: Disclosure screen

Alerts

Alert Types

Where: System Administration > Alert Types

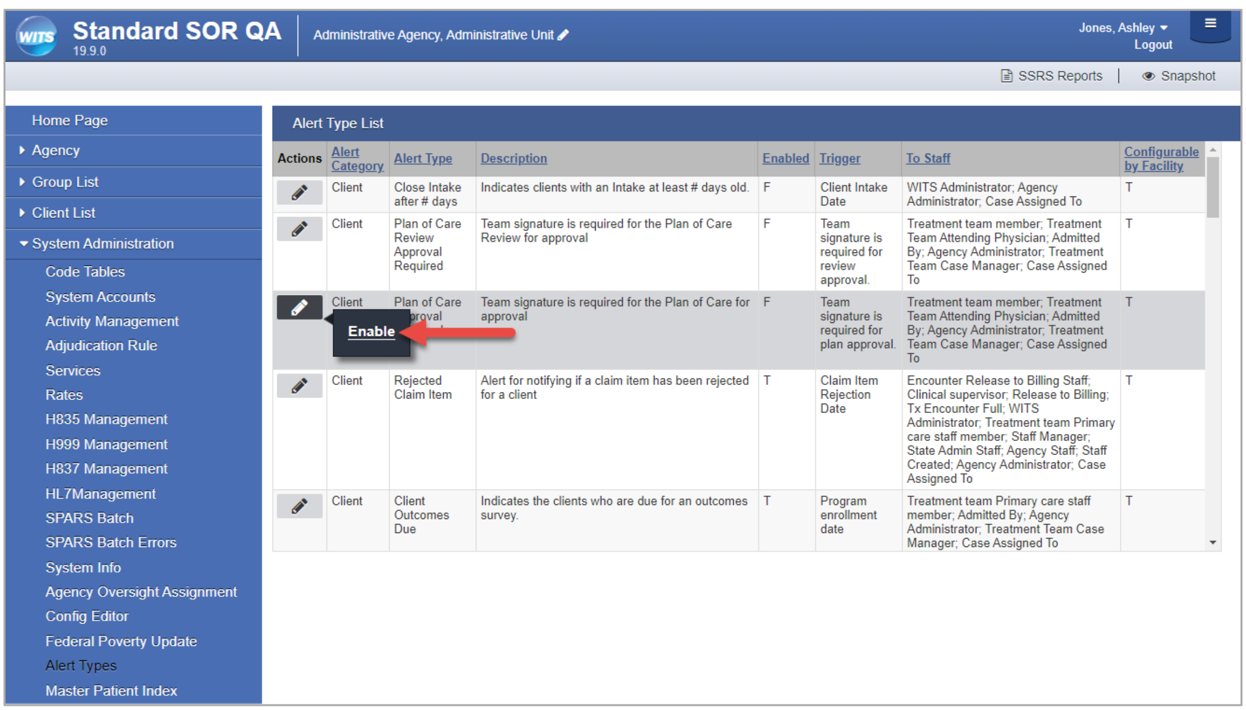
WITS Administrators can determine which alert types are available by accessing a list of alerts under System Administration.

The following list of GPRA alerts are now enabled.

Table 2-4: Add Caption for this sample table

Alert Type	Description
Discharge GPRA Creation	Alert for notifying if a discharge GPRA is created for a client.
Follow up GPRA Creation	Alert for notifying if a follow-up GPRA is created for a client.
GPRA Follow up Due	Indicates the clients where a six-month follow up GPRA interview is due.
Inactive Client GPRA Discharge	Alert for notifying if client is inactive and if Discharge GPRA must be conducted.
Intake GPRA Creation	Alert for notifying if an intake GPRA is created for a client
Intake GPRA Interview	Alert based on the interview date of the intake GPRA interview.

1. On the left menu, click **System Administration** then click **Alert Types**.
2. To enable or disable an alert, point to the pencil icon in the Actions column and click **Enable** or **Disable**.



Create Alerts

Where: Agency > Alerts Configuration

WITS Administrators can easily set up alerts that apply across multiple agencies at once. Alerts can be customized to apply to staff members with certain roles, for different client activities, and apply to staff within an agency.

To set up and configure alerts, complete the following steps:

1. On the left menu, click **Agency** then click **Alerts Configuration**.
2. Click **Add New Alert**.

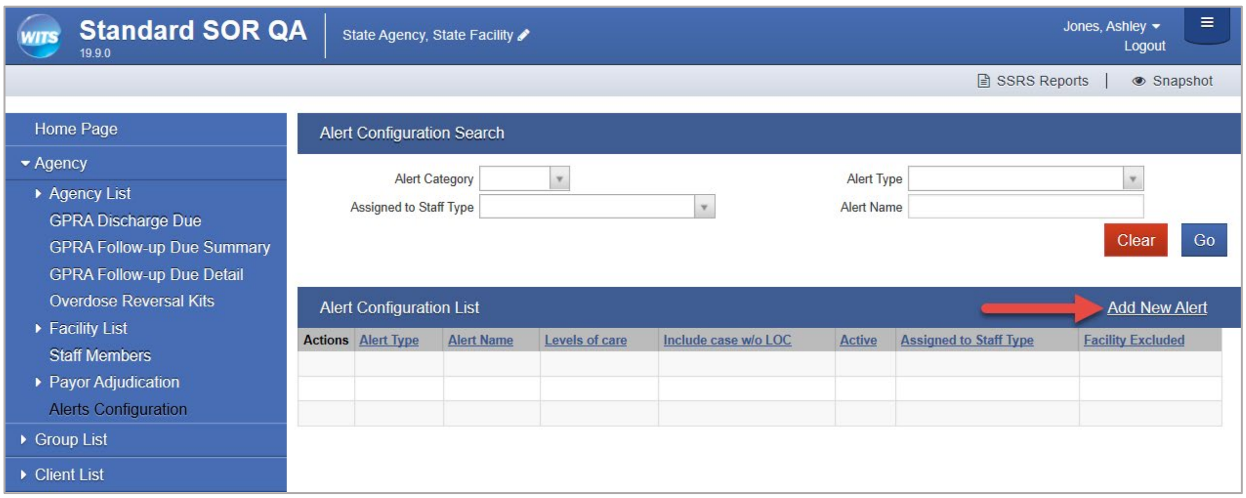


Figure 2-10: Alerts Configuration Screen

3. When the **Agency Alert Configuration Profile** screen appears, enter data in the required fields including:

Table 2-5: Agency Alert Configuration Profile

Field	Description
Configuration Type	Select Agency or Agency Type.
Agency Type	If the configuration type is "Agency Type", select the type of agency from the drop-down menu.
Alert Name	Type a name for this alert.
Alert Type	Select an Alert Type from the drop-down menu; WITS will fill in the Alert Category, Trigger Point and Description.
What message should appear to users?	Type detailed information for this alert.
When is the next activity due (days after the trigger point)?	If the Alert Type is an "Initial Treatment Plan", the trigger point is an admission date. How many days after the admission date should the initial treatment plan be created?
How many days prior to the due date should this alert show up?	If the "Initial Treatment Plan" is due 30 days after admission, when should people be notified? 10 days prior?

Field	Description
Which staff should receive the message?	Choose from a pre-defined list of staff options in the dropdown. Note, initially, alerts do not go to a "specific" staff member that can be selected directly. If all alerts should go to a specific staff member, choose "Agency Administrator". Agency Administrators can reassign alerts to specific staff in their agency.
Should message turn red when overdue?	Select Yes or No.
Include cases where no level of care indicated	Select Yes or No.
Facility	When setting up Alerts for a specific agency, you may have the ability to exclude facilities. Either determine that certain facilities should not get the alert, or they may need a different configuration.
Alert should stop being displayed this many days after it is generated	In some cases, an alert may no longer be relevant in 10, 30 or 60 days. An effective date must be entered. Set an expiration date to stop using this alert configuration.

4. When complete, click **Finish**.

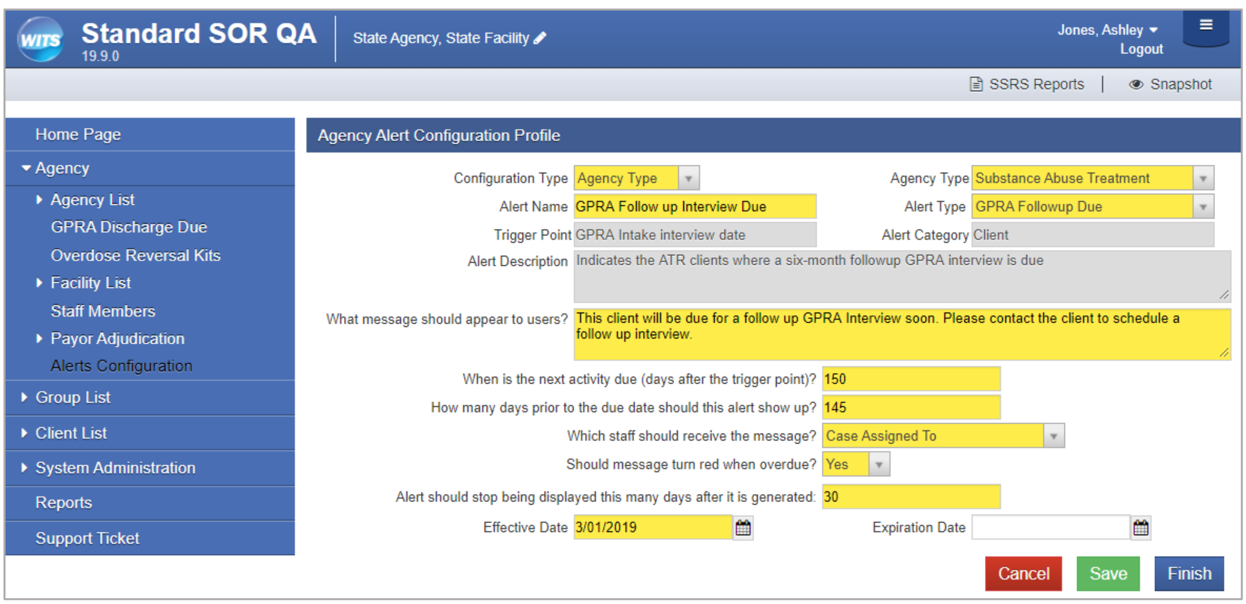


Figure 2-11: Agency Alert Configuration Profile

Which staff should receive this message?

Staff Member	Description
Case Assigned to	Staff member on the Intake screen.
Admitted by	Staff member on the Admission screen.
Treatment Team Primary Care Staff	Staff member on the client's treatment team with the Primary Care Staff indicator set to "Yes".
Treatment Team Case Manager	Staff member on the client's treatment team with the role of "Case Manager".

Announcements (Optional)

***Where:* Agency > Agency List > Announcements**

Home Page Announcements allow System Administrators and Agency Administrators to set up custom announcements which can be displayed for individual agencies, all agencies with a specific Agency Type (e.g. Substance Abuse Treatment, Recovery Support Services), or for all agencies within the system. Announcements will only be displayed for a certain period of time, and each has its own end date. Any announcement displayed in red text has been marked high priority by the staff member who created it.

Figure 2-12: Home Page with Announcement in red text

1. On the left menu, click **Agency** and then click **Announcements**.
2. Click the **Add New Announcement** link.

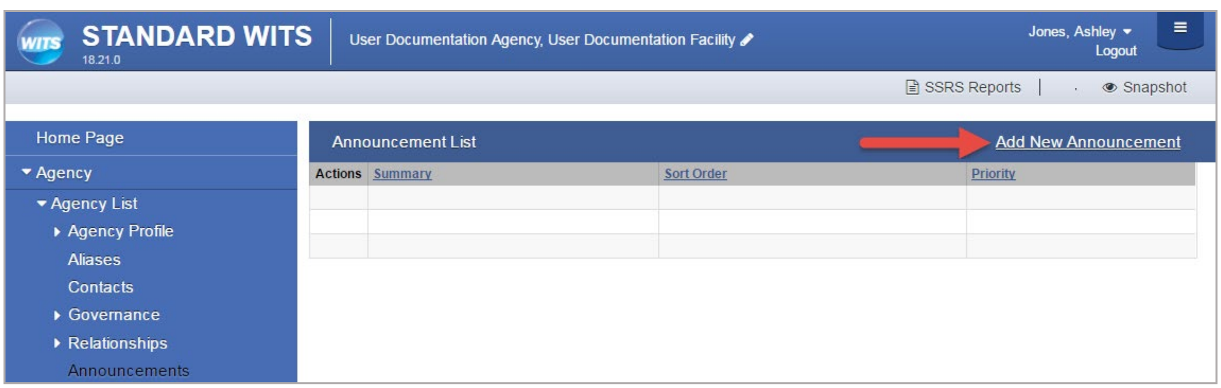


Figure 2-13: Announcements List screen

3. On the **Announcements** screen, enter the required data in the fields specified, and then click **Finish**.

Table 2-6: Announcements Fields

Field	Description
Summary	Type a summary of the announcement.

Field	Description
Details	(Optional) Type additional details about the announcement. Users will be able to see these details by hovering over the Actions column, and clicking Review. 
Agency Type	(Optional) To display an announcement for all agencies with a specific Agency Type, select an option from the Agency Type drop-down field.
Selected Domains	(Optional) Select one or more domains where the announcement should be displayed.
Agency	If the Agency drop-down field is left blank, the announcement will be displayed across all agencies.
Priority	Select from the drop-down field. A Priority of "High" will display the announcement in red.
Start Date	Enter a start date for the announcement.
End Date	Enter an end date for the announcement.

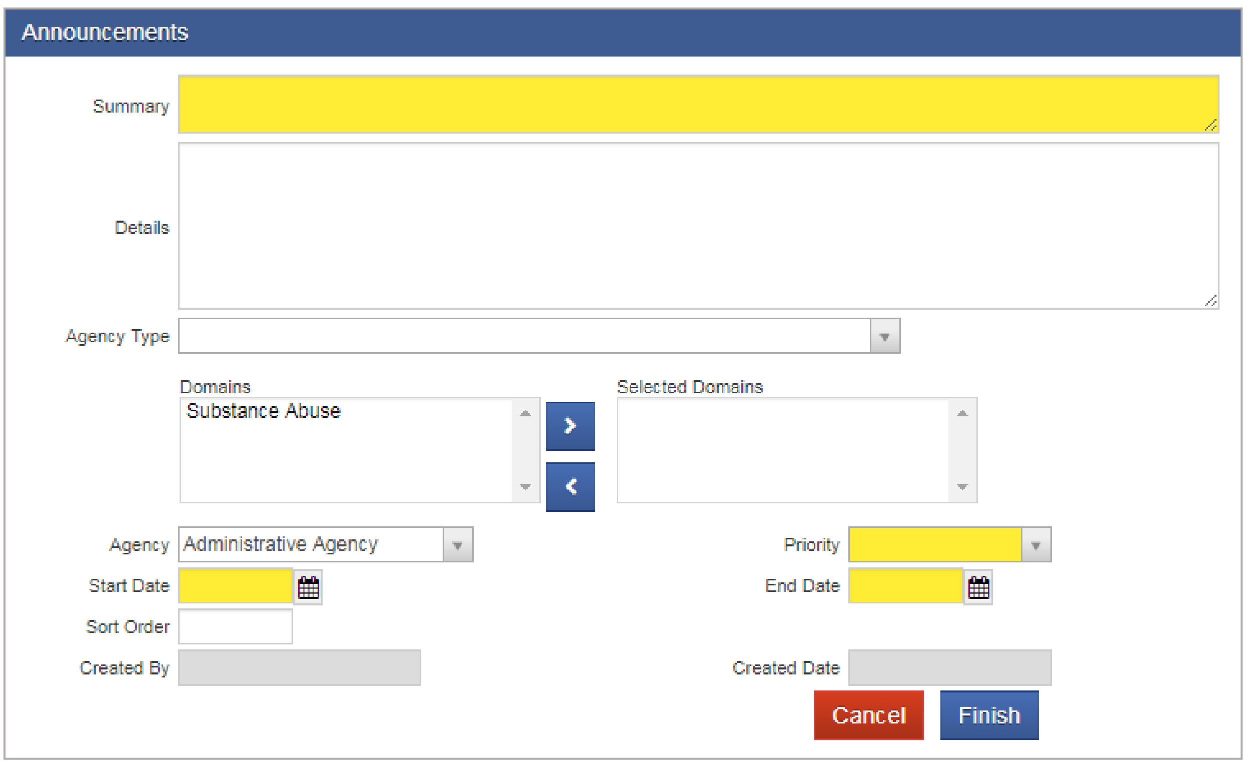


Figure 2-14: Announcements screen

4. To edit or delete the details of an announcement, click the **Review** link under **Actions** column.

> **Note**: If the **Agency** drop-down field is left blank, the announcement will be displayed across all agencies. High priority announcements will be displayed in red on the Home Page for users to see.

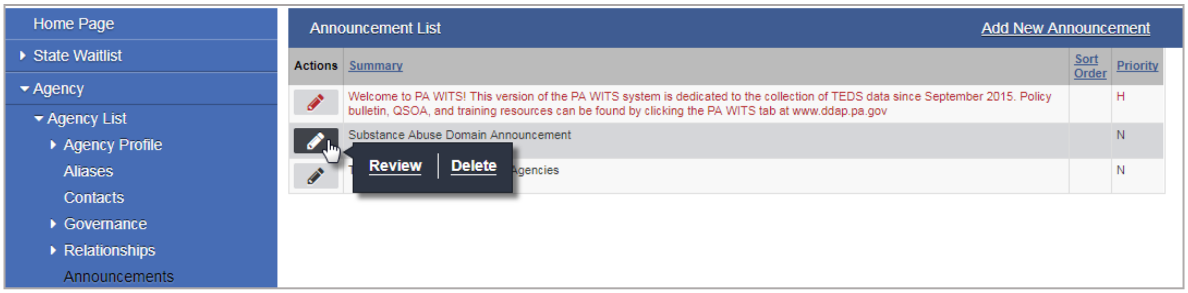


Figure 2-15: Announcement List screen, Actions links

Part 3: Facility Administration

Facility Profile

Where: Agency > Facility List > Facility Profile

A facility in WITS corresponds to a physical location where services are rendered. Every agency must have at least one facility created, but only the facility profile and address information are required. For the SOR process, also need to create at least one program for each facility. Optional facility information includes Contacts, Operating Hours, and Special Services.

Before creating a facility, ensure your current **Location** reflects the agency associated with the facility.

1. On the left menu, click **Agency**, and then click **Facility List**.
2. Click the Add New Facility **Record** link.

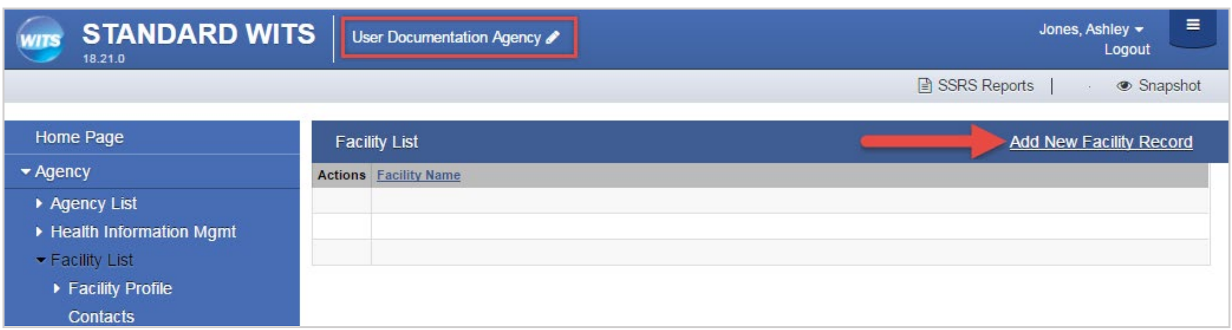


Figure 3-1: Facility List screen

3. On the **Facility Profile** screen, enter the required information:

Table 3-1. Facility Profile Fields

Field Name	Description
Facility Name	Type the facility's name.
Display Name	The facility's display name will appear in drop-down menus throughout the system and should be meaningful to all staff members; this field will automatically copy the first 15 characters from the "Facility Name" field but this information can be edited; there is a 15 character limit for this field.
I-BHS #	Required field, used in the TEDS/NOMS extract process
Service Location	Value selected will be the default value on the encounter Service Location field for encounters created for this agency and facility
Operations Start/End Date	Optional/Informational
Reports Start/End Date	Optional/Informational
Contact	Optional/Informational
Alternate Contact	Optional/Informational
Facility ID	Optional/Informational
National Provider ID	Optional/Informational (important when using WITS for billing)
Senate Dist	Optional/Informational

Field Name	Description
House Dist	Optional/Informational
Cong Dist	Optional/Informational
County	Select from the drop-down menu.
Geo Code	Optional/Informational
URL	Optional/Informational
Description	Optional/Informational
Selected Approaches	Optional/Informational
Selected Languages	Optional/Informational

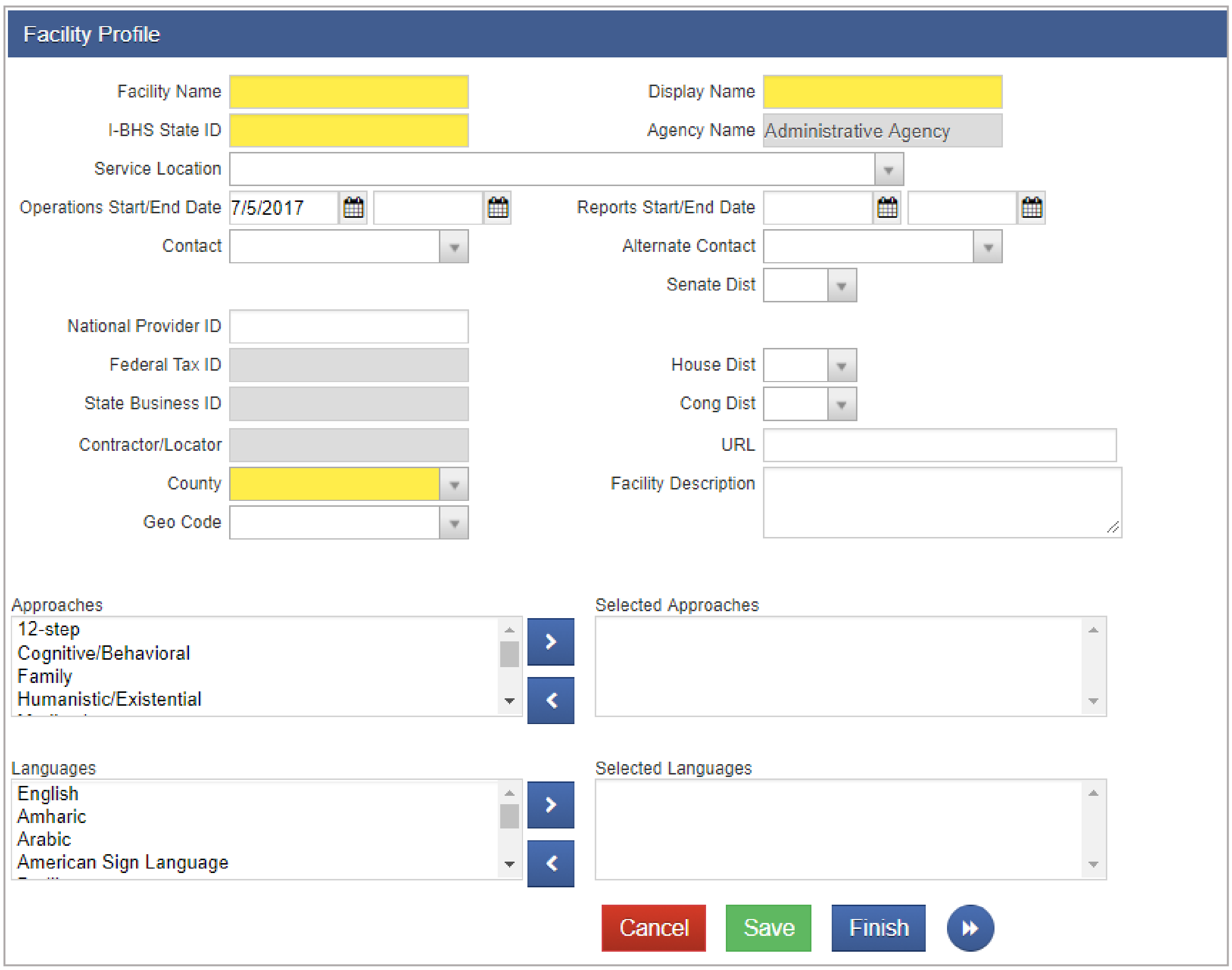


Figure 3-2: Facility Profile screen

4. When complete, click **Save**.
5. Click the **right-arrow button** to enter the address.

6. Click the **Add Address** link.

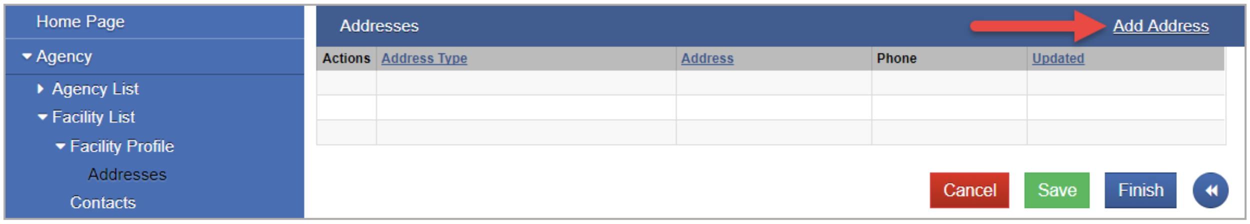


Figure 3-3: Add Facility Address

7. Enter the required information as shown in the table below.

Table 3-2: Address Information fields

Field	Description
Address Type	Select from the drop-down menu.
Confidential	This field defaults to “No”; update if applicable.
Address Line 1	Type the first address line.
Address Line 2	Type the second address line, if applicable.
City	Type the city name.
State	Select state from the drop-down menu.
Zip	Type the zip code.

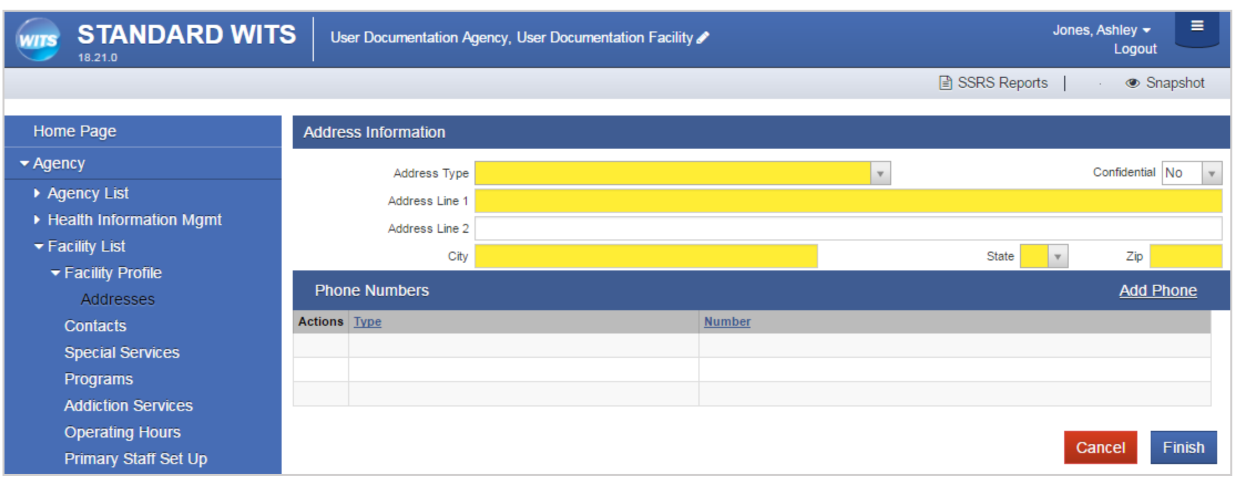


Figure 3-4: Facility Address screen

8. If available, add a telephone number by clicking **Add Phone**.

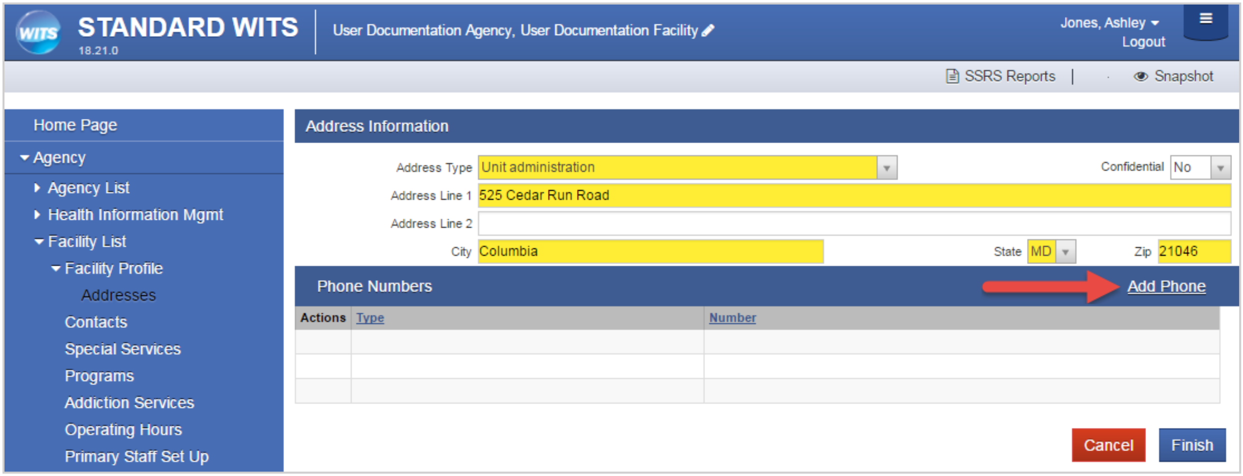


Figure 3-5: Facility Address screen, Add Phone link

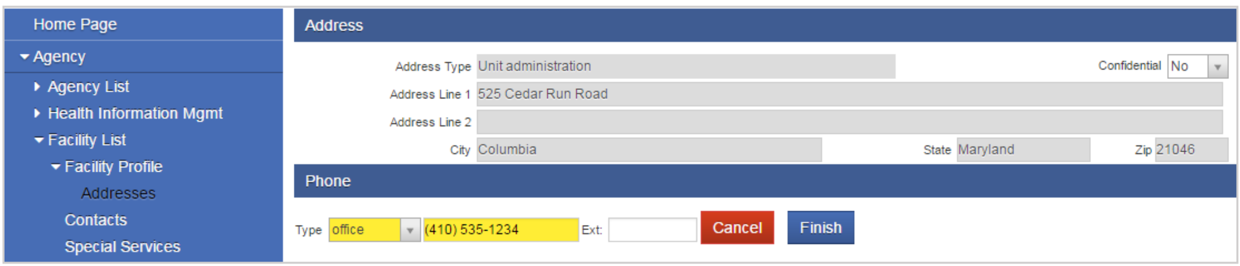


Figure 3-6: Facility Address screen, Add Phone Number

9. Enter the phone number, and then click **Finish**.

10. On the Address Information screen, click **Finish**.

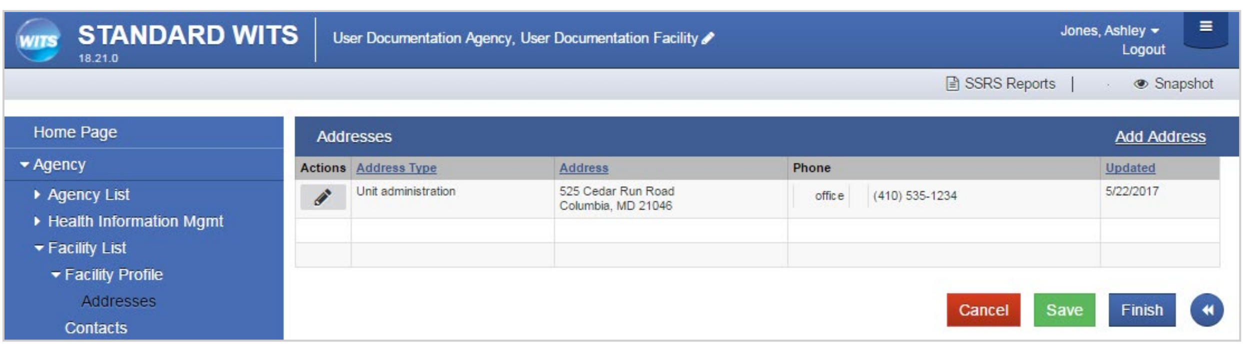


Figure 3-7: Facility Addresses screen with address and phone number added

11. On the Addresses screen, click **Save** and then click **Finish**.

Contacts

***Where:* Agency > Agency List > Facility List > Contacts**

Note: Staff Members must be set up in the agency before Contacts can be added to the Facility. Please see the Staff Management section of this document for information on managing staff accounts.

Information listed in the Contacts information is informational only, allows you to indicate administrative functions for staff in the agency (e.g., staff member is the contact for program availability or the staff member is the person monitoring referrals). WITS Administrators can modify the Contact Type dropdown values in the Staff Contact Role code set table.

1. On the left menu, click **Agency**, click **Facility List**, and then click **Contacts**.
2. Click **Add Contact**.

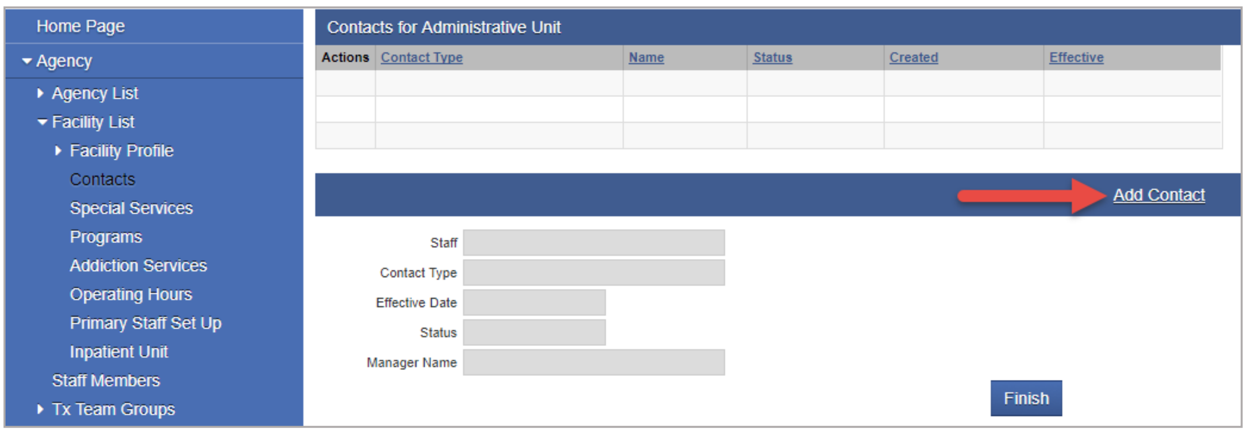


Figure 3-8: Facility Contacts screen

3. Complete the fields.

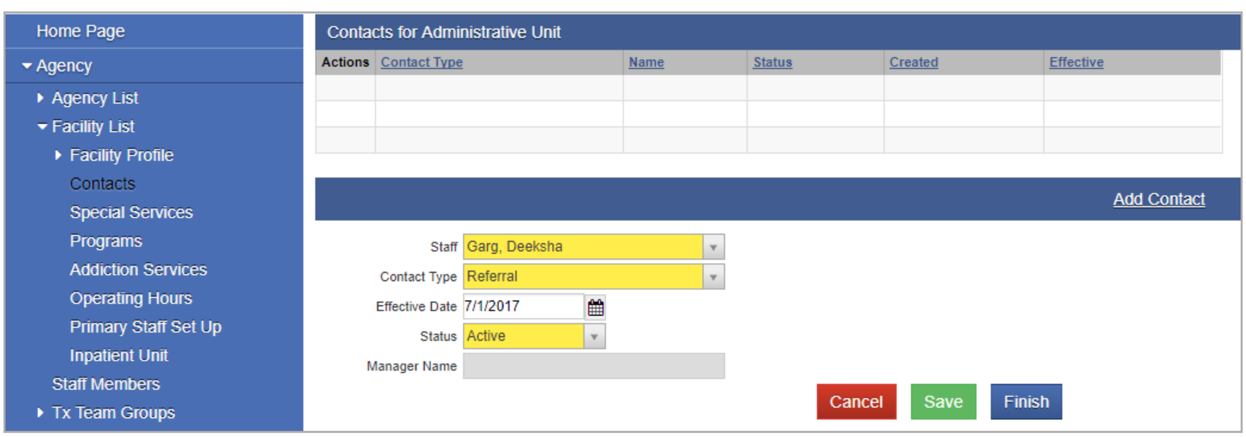


Figure 3-9: Facility Contacts screen, add new contact

4. Click **Save**. Add additional contacts if needed.
5. Click **Finish**.

Special Services (Optional)

***Where:* Agency > Agency List > Facility List > Special Services**

1. On the Special Services screen, select **Special Population Services** from the mover box, if applicable.
2. Click **Add New Information Item**, if applicable.

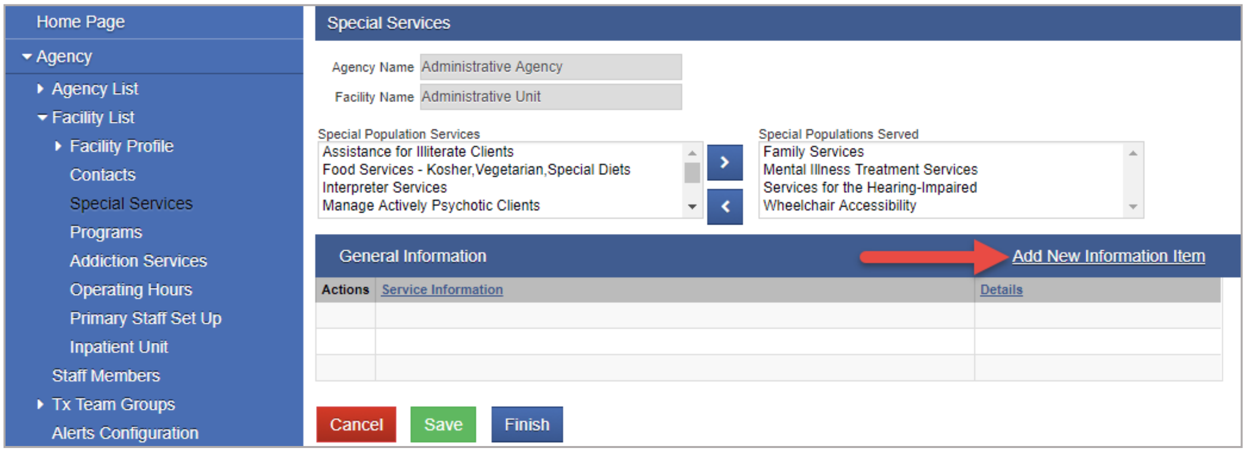
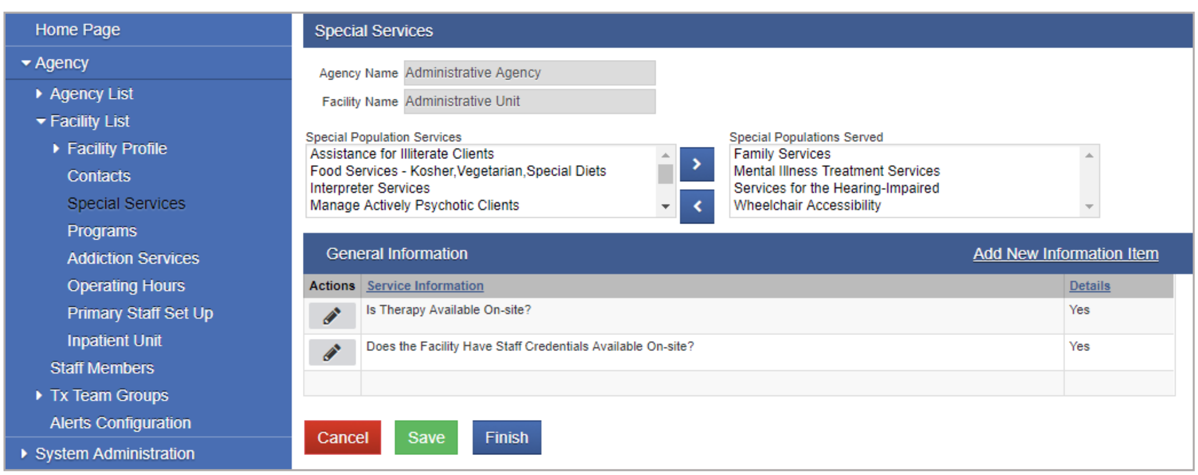


Figure 3-10: Facility Special Services screen, Add New Information Item link

3. Select an item from the **Facility Supported Services** drop-down list.

Figure 3-11: Add New Information Item screen

4. Click **Save** then click **Finish**.



5. Click **Save**.

Programs

***Where:* Agency > Agency List > Facility List > Programs**

Each facility in WITS should have one or more Programs listed to indicate the type of services it provides to clients. Each program must have a Modality or Level of Care. Programs that are set up outside of treatment can select a modality type of unknown. Programs types can include substance use treatment, social service programs addressing behavioral health, problem gambling, substance use prevention, juvenile justice, problem solving courts, and primary health applications.

1. On the left menu, click **Agency**, then click **Facility List**, and then click **Programs**.
2. Click the **Add New Program Record** link.

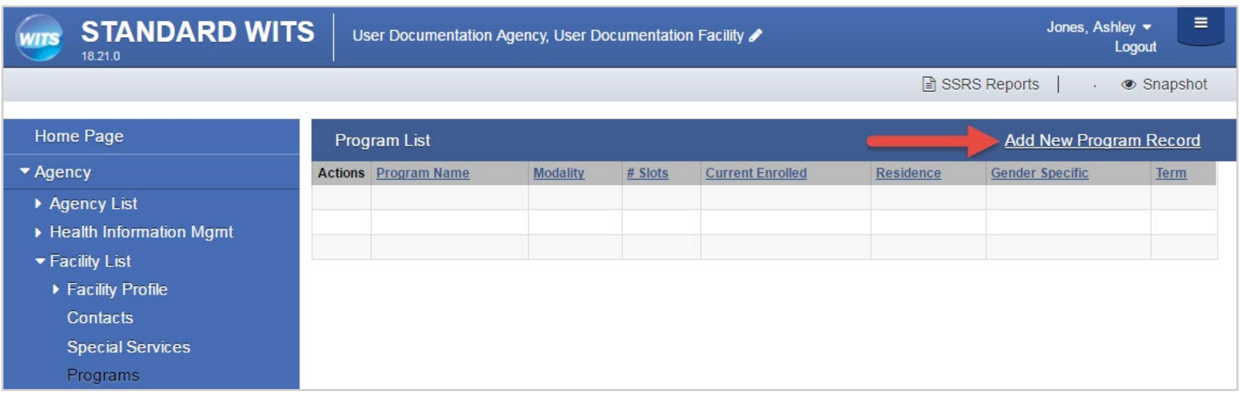


Figure 3-12: Programs List

Important: Program Setup Fields for SOR Processing:

- **Grant**: Complete the Grant field by selecting **"SOR"** from the drop-down list, as this field controls SOR Grant Episode functionality.
- **Modality**: Complete the Modality field by selecting a value where the *Admission Required* column in the "Modality Type" code table is set to "**No**".
- **Modality Specifier**: For MAT programs select the Modality Specifier of **"Medication Assisted Treatment**" to have the *Medications Dispensed* field appear on the encounter.
- **Report to TEDS**: Leave the Report to TEDS field as the default value of **"No"**.

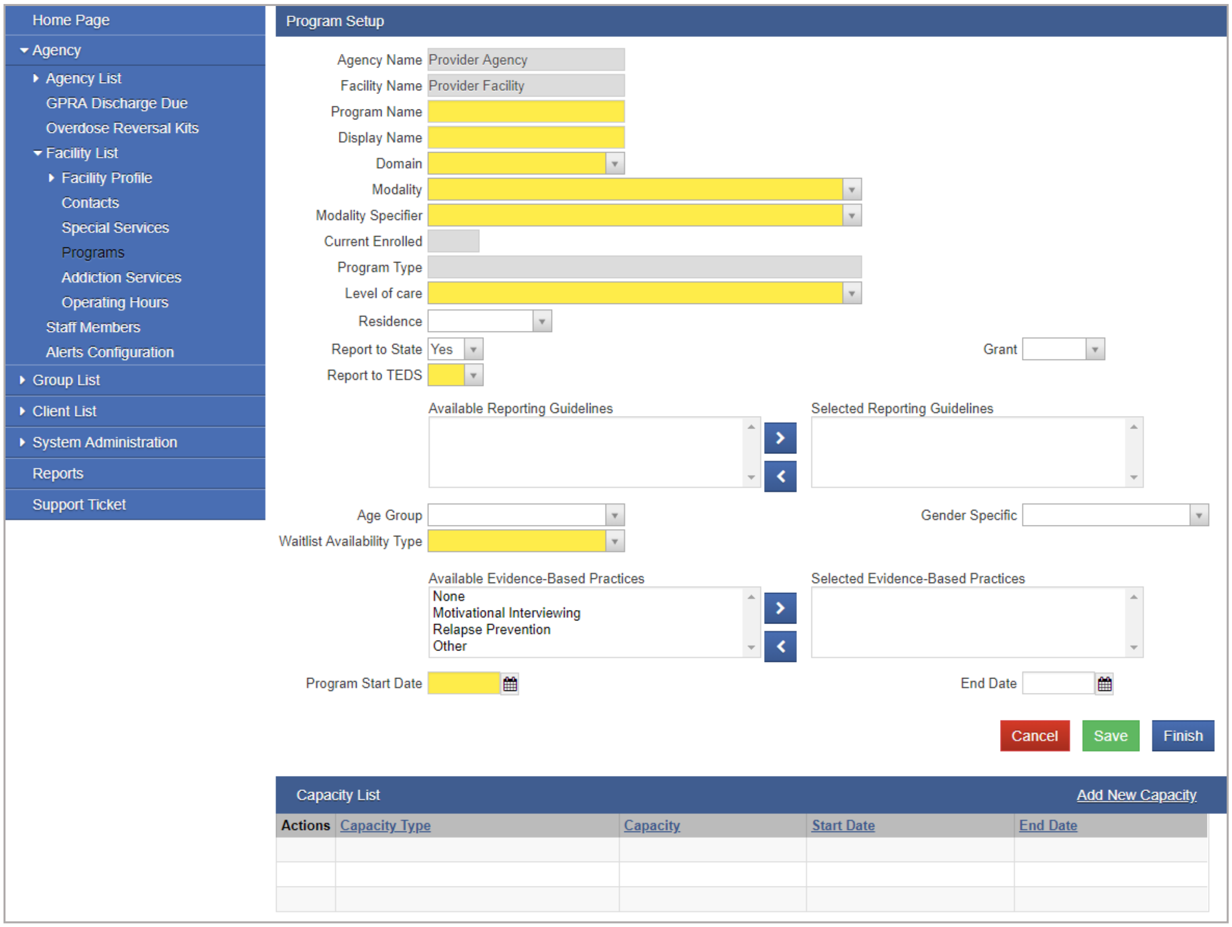
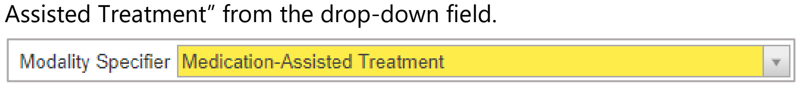


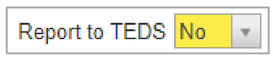
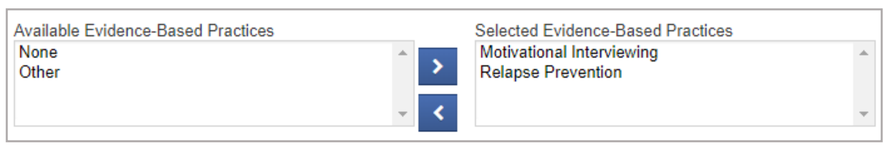
Figure 3-13: New Profile Setup screen

3. On the Program Setup screen, complete the fields as shown in the table below.

Table 3-3: Program Setup Fields [2]

Field	Description
Program Name	Program may be titled anything you or the provider desires.
Display Name	Type the program's display name. **Note**: this field is limited to 15 characters.
Domain	Select the domain from the drop-down list.
Modality*	Select modality that is the best fit for this program. **Note**: Values are controlled through the code table named, "Modality Type". See ***Part 5: System Administration, Code Table: Modality Type*** on page 70.
Modality Specifier*	To record medication-assisted treatments on client encounters, select "Medication-Assisted Treatment" from the drop-down field.  **Note**: Values are controlled through the code table named, "Modality Specifier". See ***Part 5: System Administration***, ***Code Table: Modality Specifier*** on page 73.

[2] *Fields marked with an asterisk (*) are important for SOR programs. Make sure these fields are set up correctly.

Field	Description
Current Enrolled	Read-only field displaying the number of clients currently enrolled in the program.
Program Type	Read-only field.
Level of Care	Assign appropriate ASAM level of care.
Residence	Select the location from the drop-down list. (County code table)
Grant*	Select "SOR" from the drop-down field. 
Report to State	Select Yes or No.
Report to TEDS*	Select No. 
Age Group	Leave blank if your program is not restricted by age.
Gender Specific	Leave blank if your program is not restricted by gender
Selected Evidence-Based Practices	Select the appropriate Evidence-Based Practices as applicable. 
Program Start Date	Enter the program's start date.
Program End Date	Add an end date when the program is no longer available.

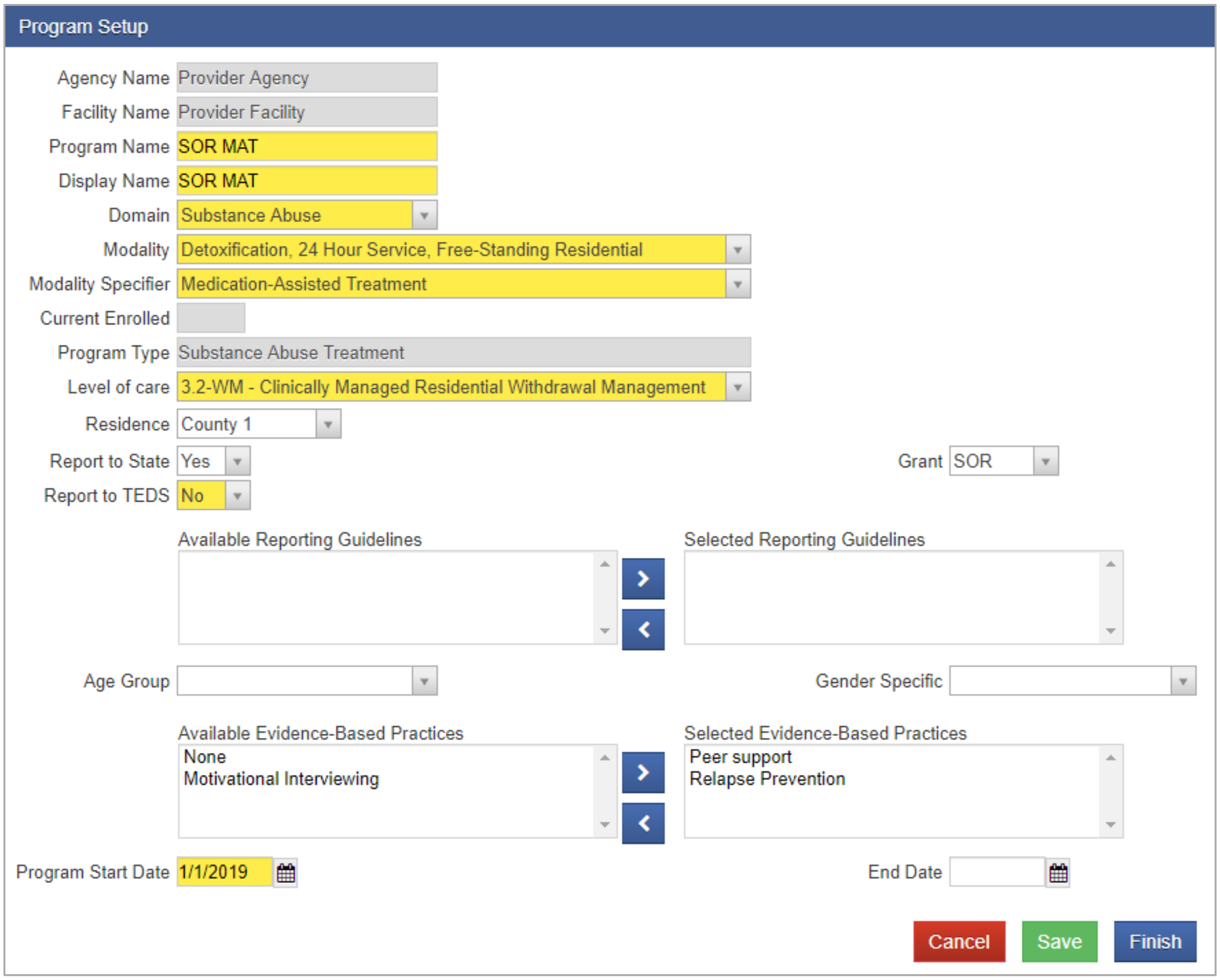
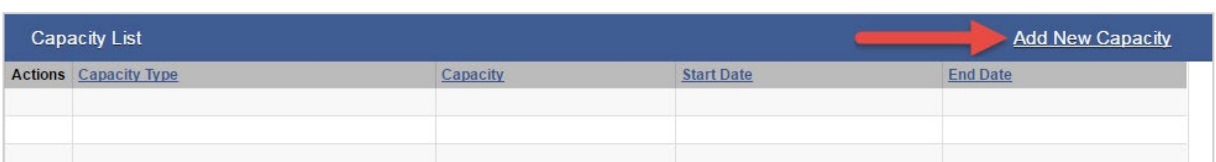


Figure 3-14: Example of MAT Program Setup fields

4. Click **Save**. Once you click Save, certain fields will be grayed out and you will no longer be able to edit them.

5. Click **Add New Capacity**.



6. Complete the fields:

Table 3-4: Program Capacity Details fields

Field	Description
Capacity Type	Select Beds or Slots from the drop-down list.
Daily Capacity	Type the maximum number of Beds or Slots that can be filled on one day.
Start Date	Enter the start date for this capacity type.
End Date	(Optional)
Note	(Optional)

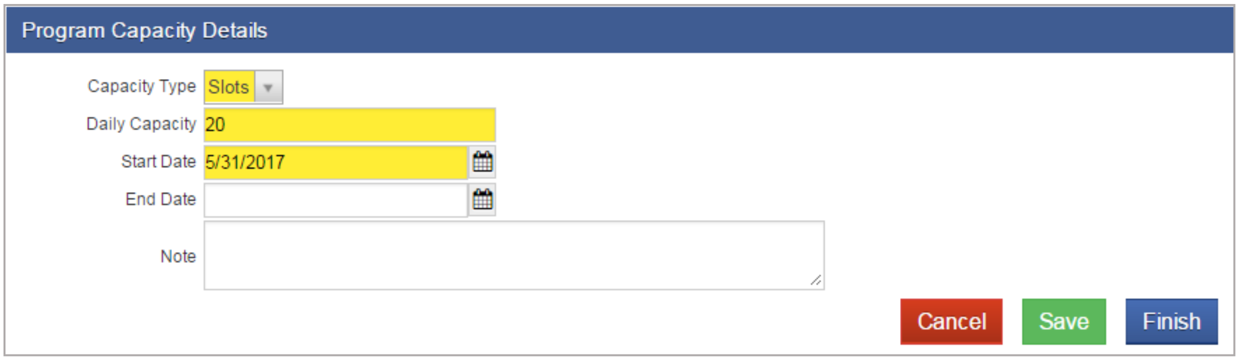
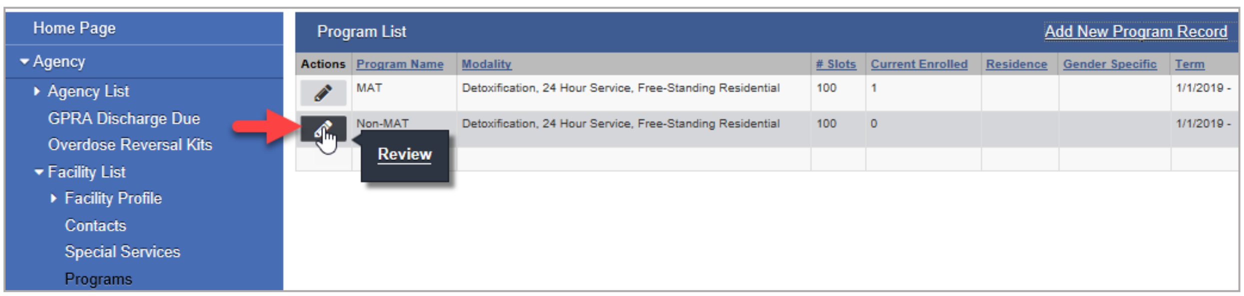


Figure 3-15: Program Capacity Details screen

7. Click **Finish**.

8. Click **Save** and then click **Finish**. Add additional programs if needed.



Addiction Services (Optional)

***Where:* Agency > Agency List > Facility List > Addiction Services**

Enter addiction services for your facility, if applicable.

1. On the left menu, click **Agency**, then click **Facility List**, and then click **Addiction Services**.

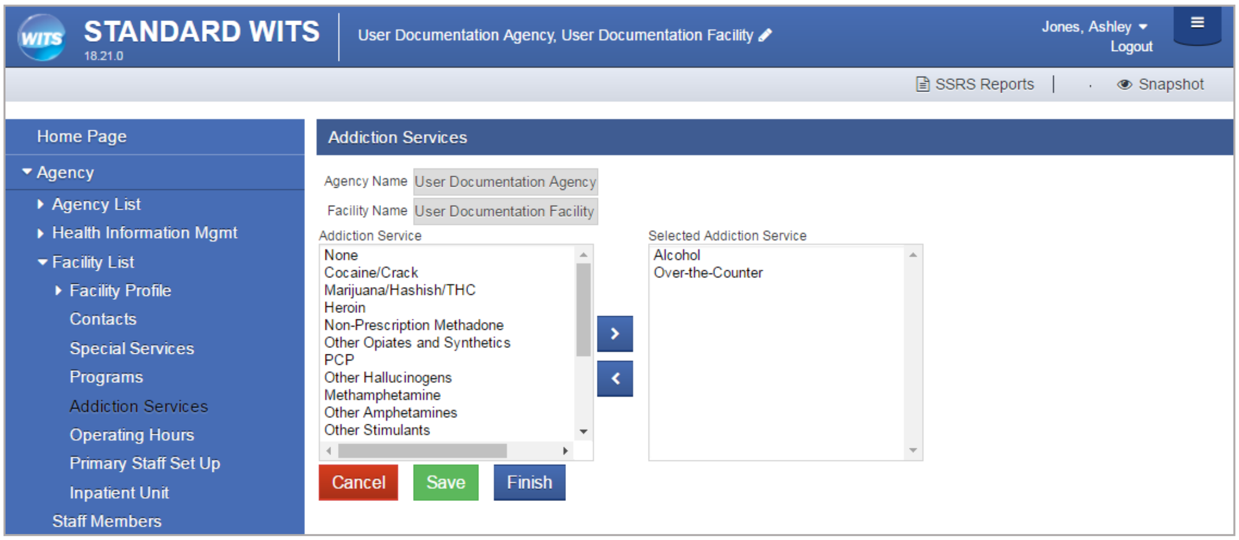


Figure 3-16: Addiction Services screen

2. Click **Save** and then click **Finish**.

Operating Hours

***Where:* Agency > Agency List > Facility List > Operating Hours**

The facility's operating hours can be entered on this screen.

- Please enter times in **hh:mm** format followed by "**AM**" or "**PM**" (ex: 08:30 AM).
- Multiple ranges can be created within one day, such as 8:00 AM-12:00 PM (Range 1), then 12:30 PM-8:00 PM (Range 2).

1. On the left menu, click **Operating Hours**.
2. Enter the facility's operating hours.

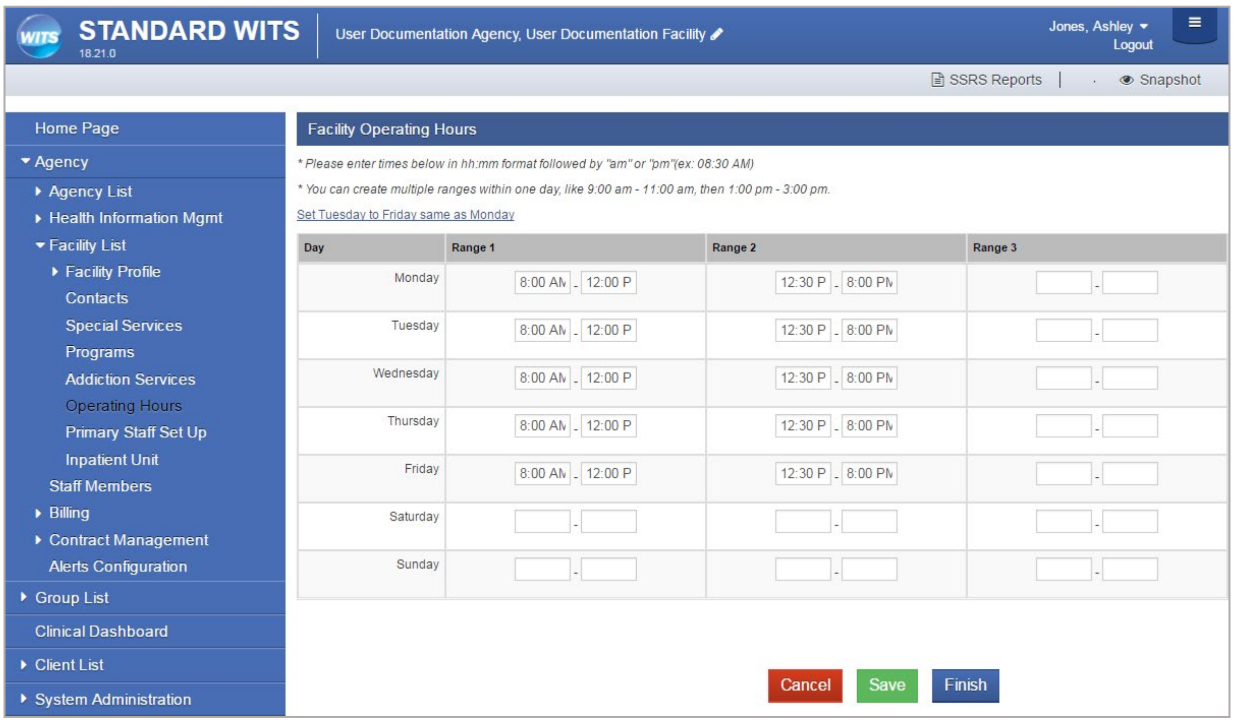


Figure 3-17: Facility Operating Hours

3. Click **Save**.

Part 4: Staff Management

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

Staff Member List & Search Screen

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

Table 4-1: Search/List Screen Icons/Buttons

Field	Description		
	Pencil Icon: Pointing to the icon will display available options to click.		**Table View**: Presents data in a table format.
	Export: Allows the user to export results.		**Panel View**: Presents data in a panel-by-panel view.
Select Columns	**Column Selector**: Allows the user to select the columns that they would like to view.	Table Select View	**Hover Text**: When you point to an item or symbol, text describing the item may appear.
Search... Search		**Search**: Type within the search field and then click the Search button.	
Previous 1 2 3 4 5 Next		**Pages**: Allows the user to page through all search results.	

Table 4-2: Workspace Screen Icons/Buttons

Field	Description		
EDIT	**Edit**: Click to enable editing for the screen. Otherwise, the panels on screen will be read-only.		
Add	**Add**: Allows the user to add data to the panel or section.		**Remove**: Allows the user to delete information in the panel or section.
	Edit: Allows the user to edit information on a panel or section.		**History**: Allows the user to view the changes made on the current page.
Save	**Save button**: All required fields have been completed.	Cancel	**Cancel button**: Click to leave the screen/panel without saving.
Save	**Inactive Save button**: Required fields are incomplete; button cannot be selected.	Lock	**Lock**: Allows the user to lock an account.
DONE EDITING		**Done Editing**: Click when finished edited screen.	
Back to Search		**Back to Search**: Click to return to the Search screen.	

Table 4-3: Workspace Screen Data Fields

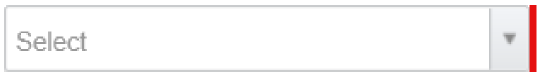
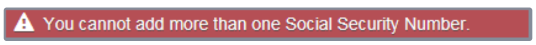
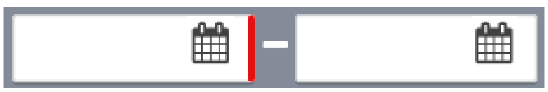
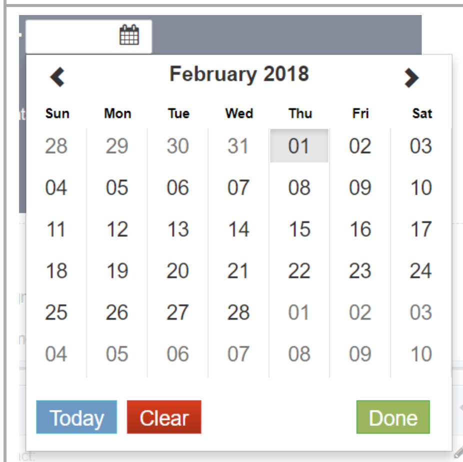
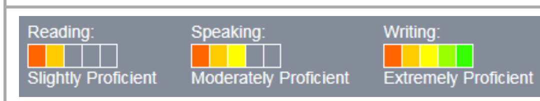
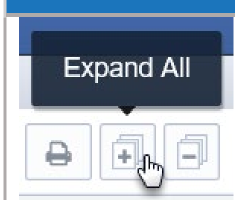
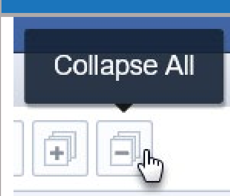
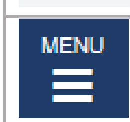
Field	Description
	Required Field: Required fields are marked with a red line on the right side. This field must be completed to save the screen/panel.
	Optional Field: This field may be left blank.
	**Drop-down field**: Select one option from the list.
	**Error Message**: The error message is localized and is generated where the error occurred.
	**Date-range fields/Calendar picker**: Enter a date or click the calendar icon to select a date.
	**Date Picker**: Allows the user to pick a date from a calendar.
	**Likert Scale**: Presents information visually and allows for quick interpretation of the data.

Table 4-4: Workspace Screen, Other Icons/Buttons

Field	Description		
	**Expand All**: Expands all collapsed panels on workspace screen.		**Collapse All**: Collapses all expanded panels on workspace screen.
	**Collapsible Menu**: The left-hand navigation menu is collapsible in WITS on the Staff Member and System Account screens. When it is collapsed, you will only see the icon to the left. When it is un-collapsed, you will see the entire left-hand navigation panel.		

Staff Member Search

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

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

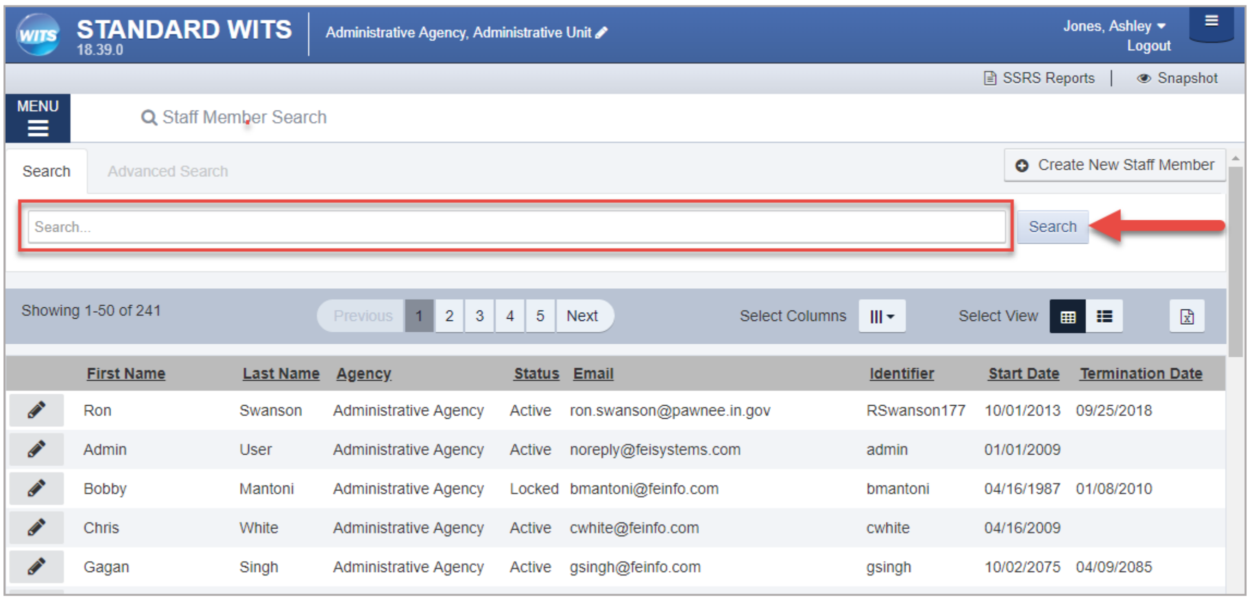
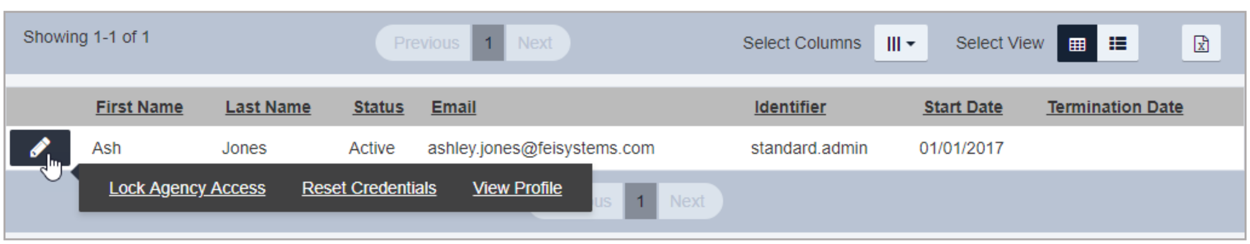
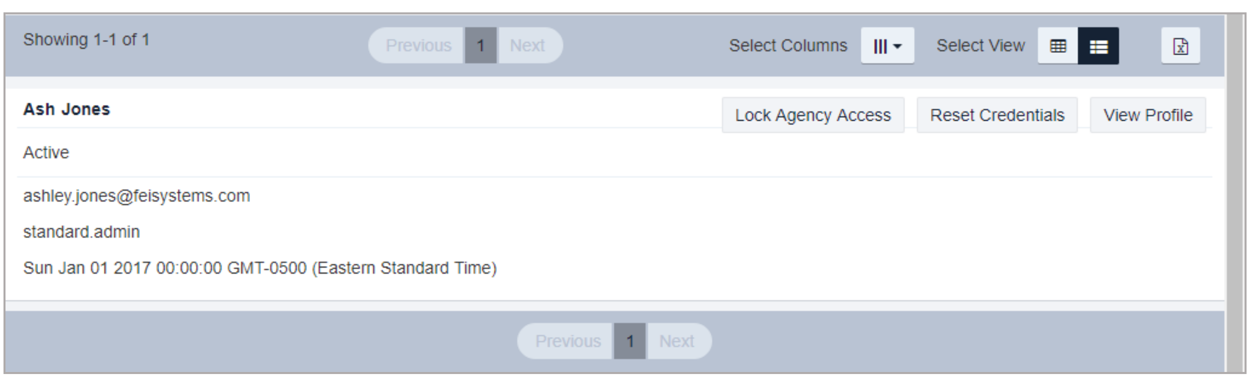


Figure 4-1: Staff Member Search/List screen

Table View



Panel View



Advanced Search

1. On the left menu, click **Agency**, and then click **Staff Members**.
2. Click the **Advanced Search** tab.

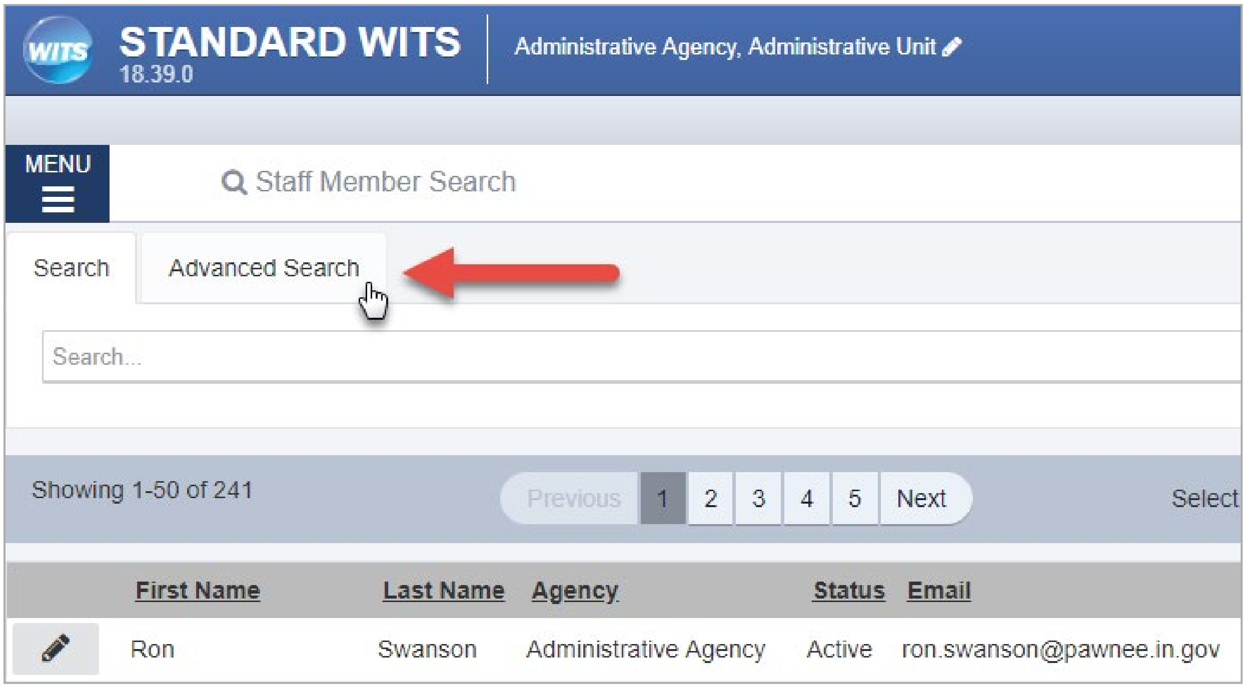


Figure 4-2: Advanced Search tab

3. Click **Add Search Criteria**. This will display a drop-down list.

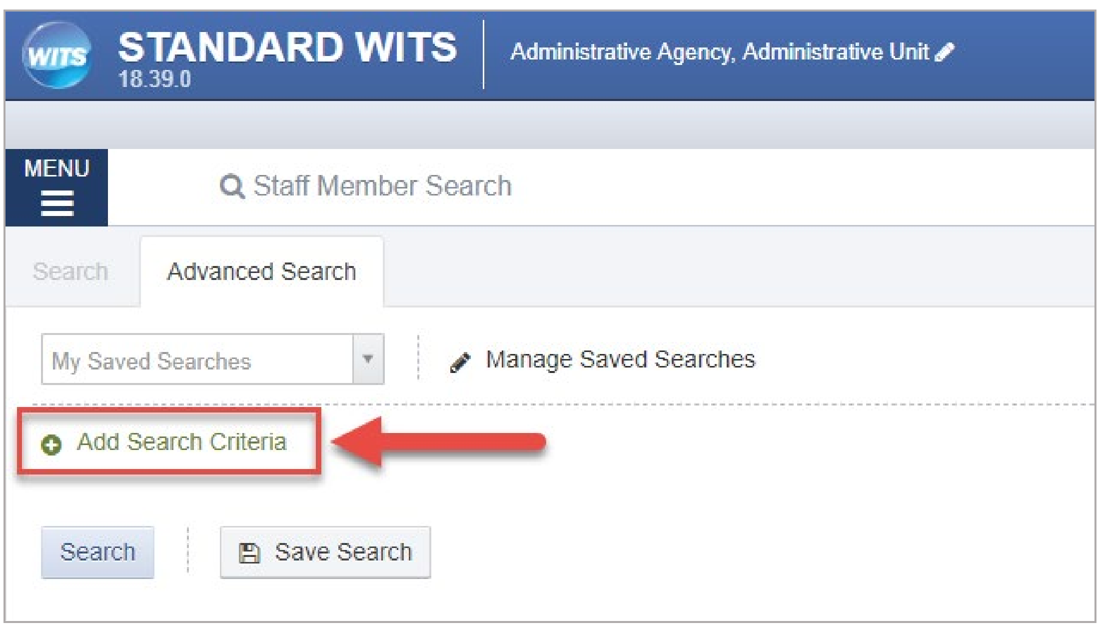
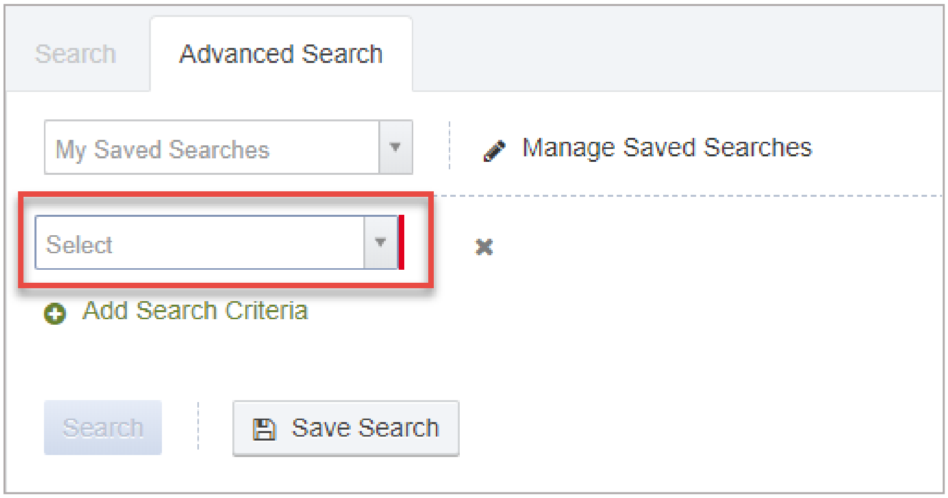


Figure 4-3: Add Search Criteria



4. Click an option from the drop-down list.

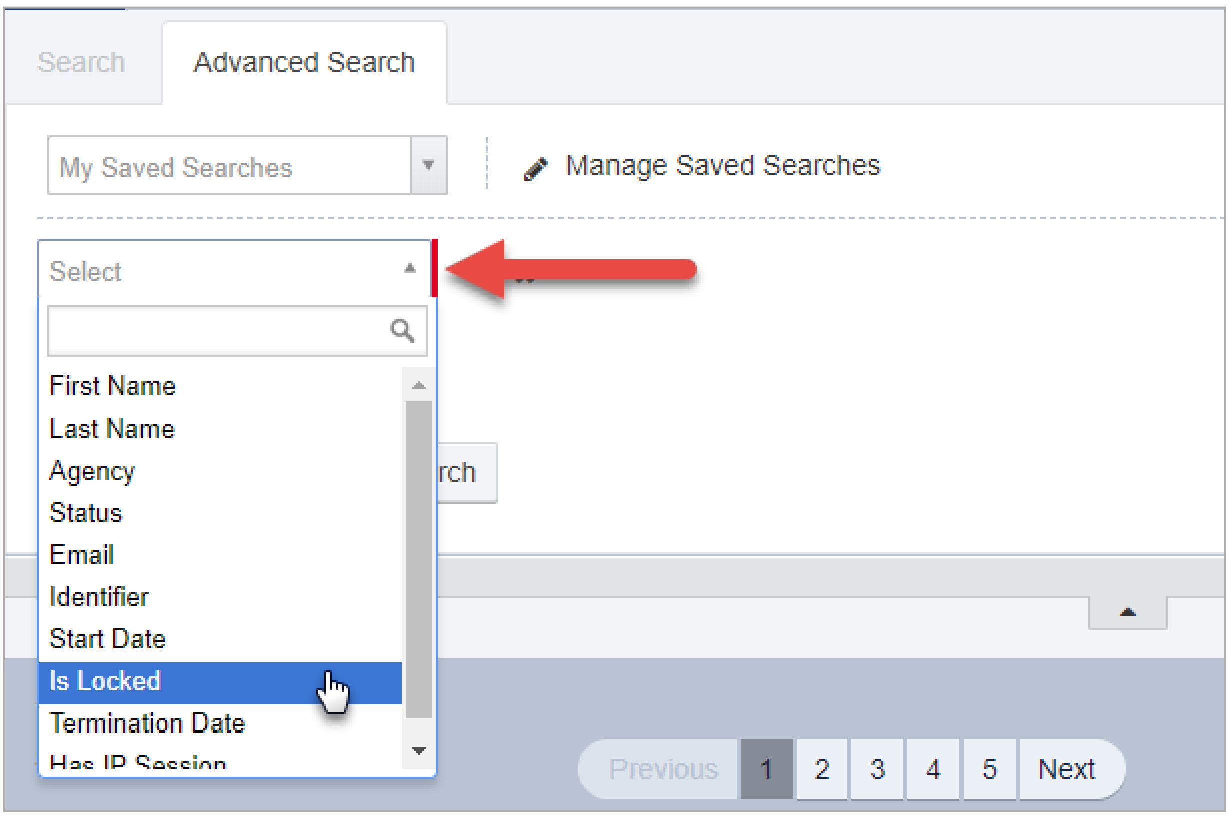


Figure 4-4: Advanced Search Selection

5. Based on the option selected, additional field(s) will be displayed to select further search criteria. In this example, select True or False.

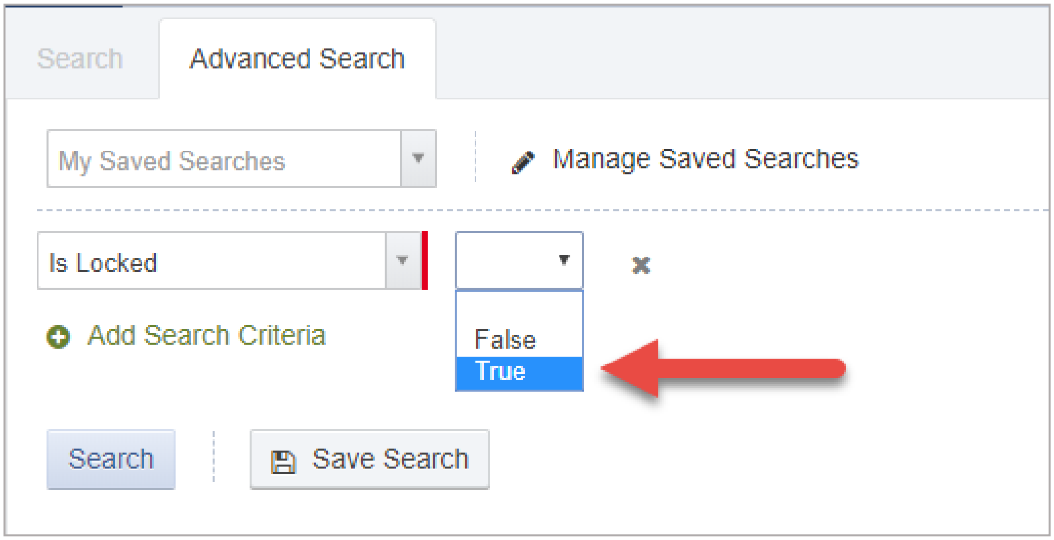


Figure 4-5: Additional Advanced Search Criteria

6. After any additional search criteria is entered, click **Search**.

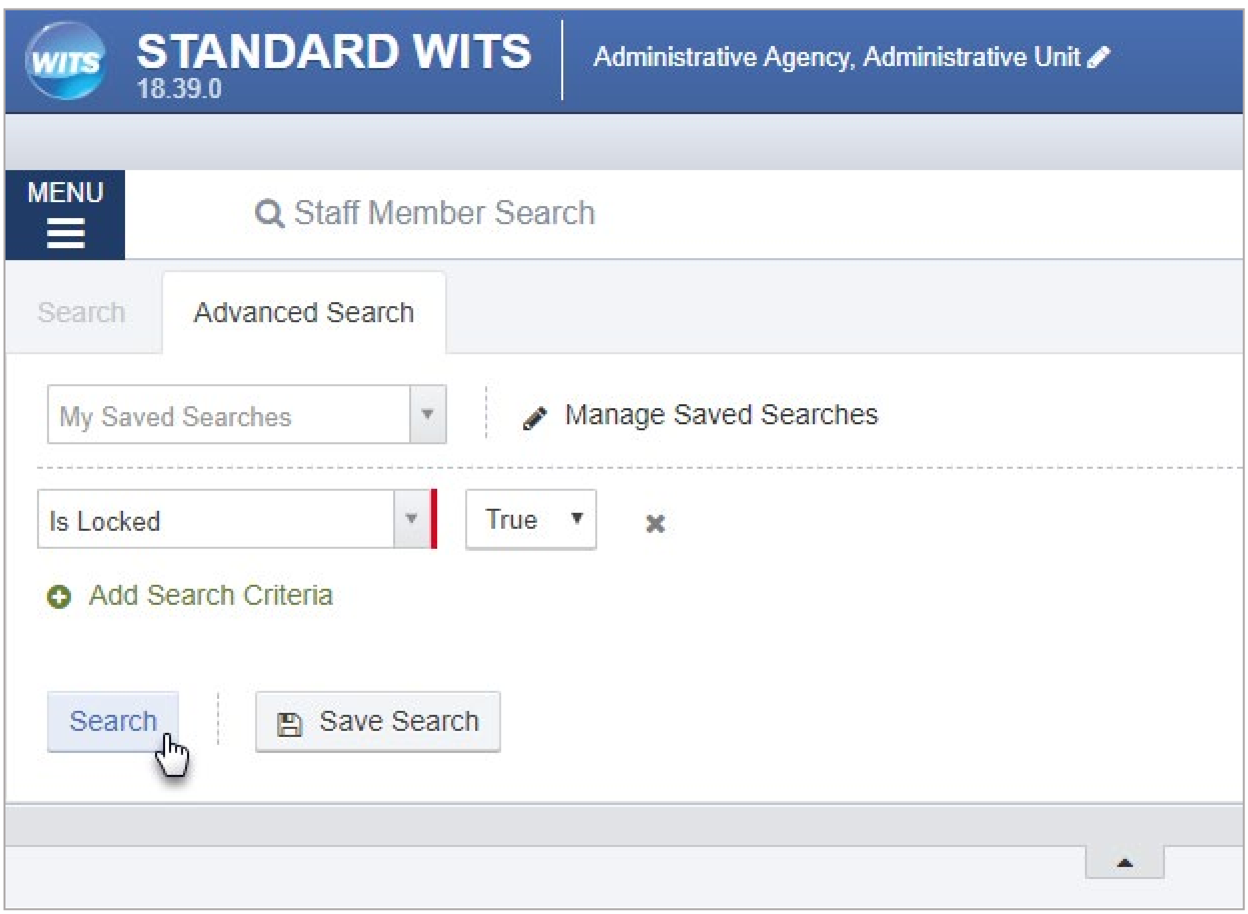
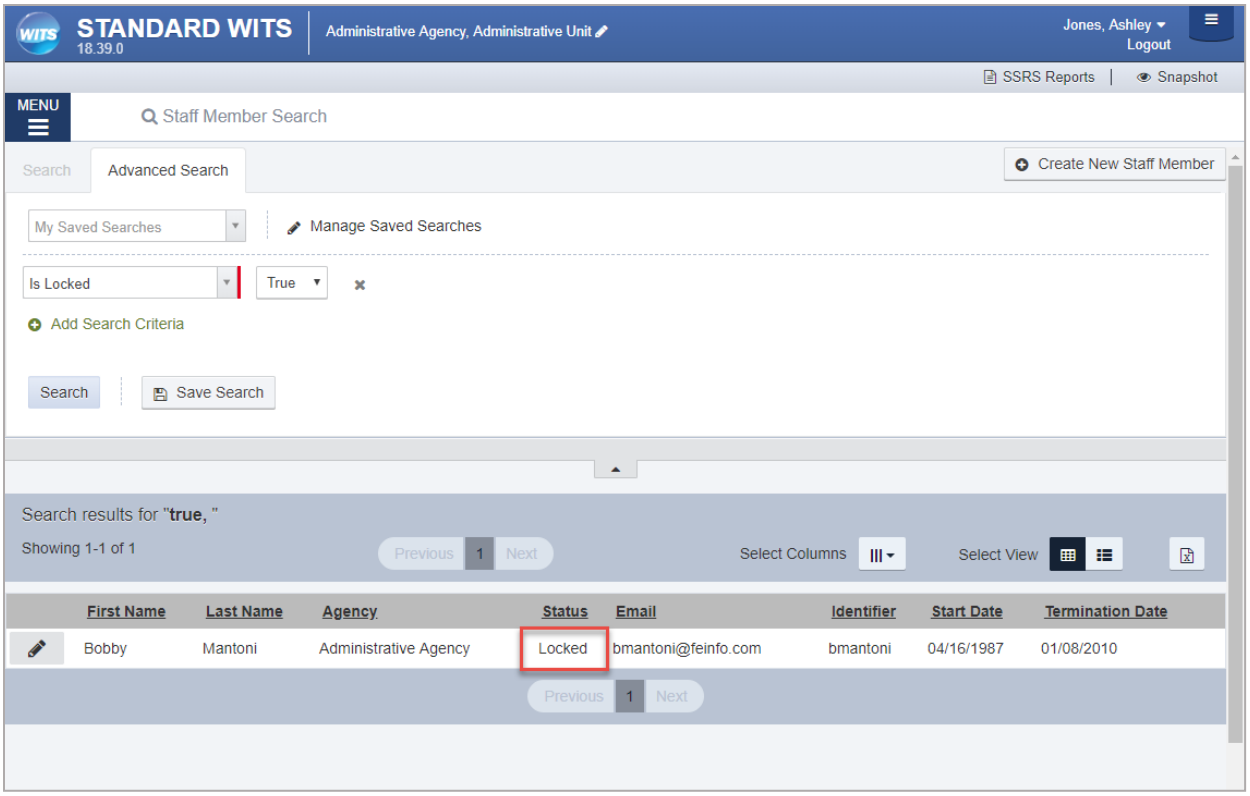


Figure 4-6: Advanced Search; Click Search

7. The search results (if any) will be displayed in the list on screen.



Save Advanced Searches

1. To save your advanced search to use at another time, click **Save Search**.

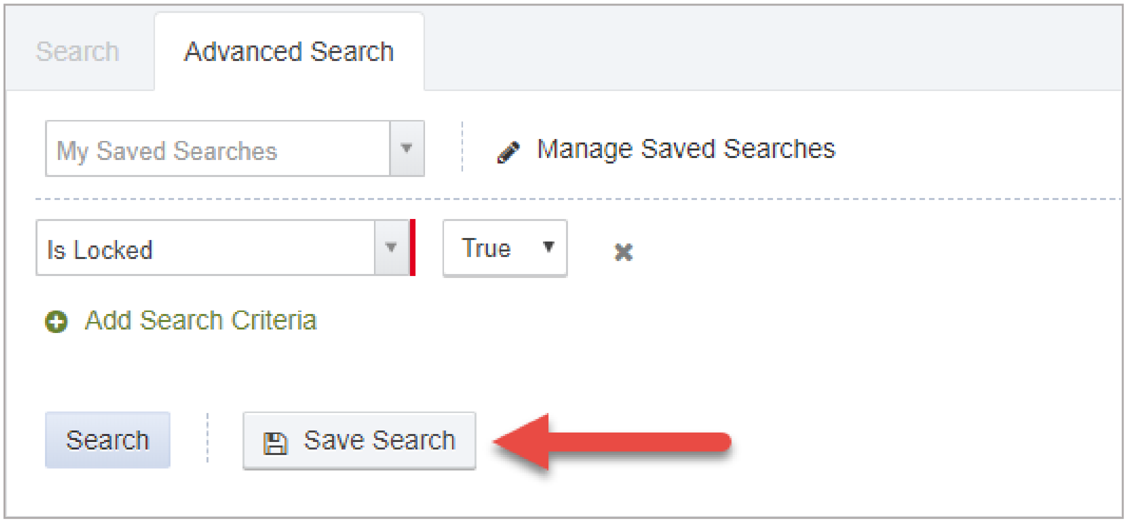
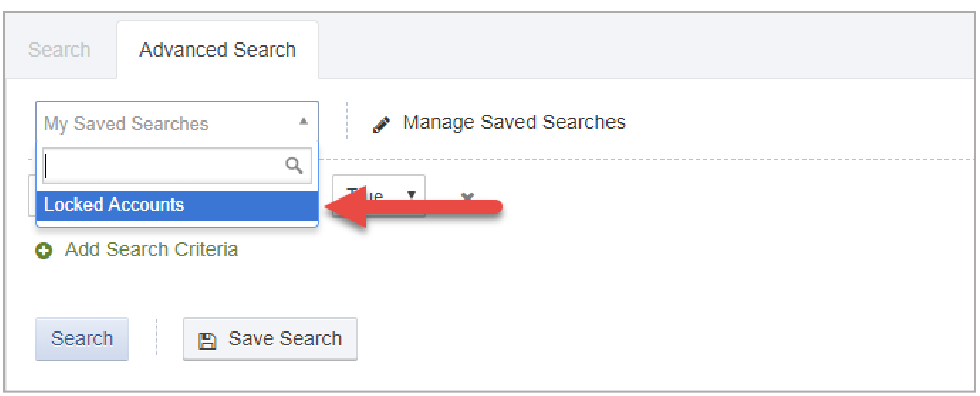


Figure 4-7: Advanced Search, Save Search

2. In the dialog box, type a name for this specific advanced search.

3. Click **Save**. Saved searched will be available in the field, “My Saved Searches”. These saved searches are only visible to the staff member who created them.



How to Set Up a New Staff Member Account

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

Follow the steps below to create a new staff account.

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

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

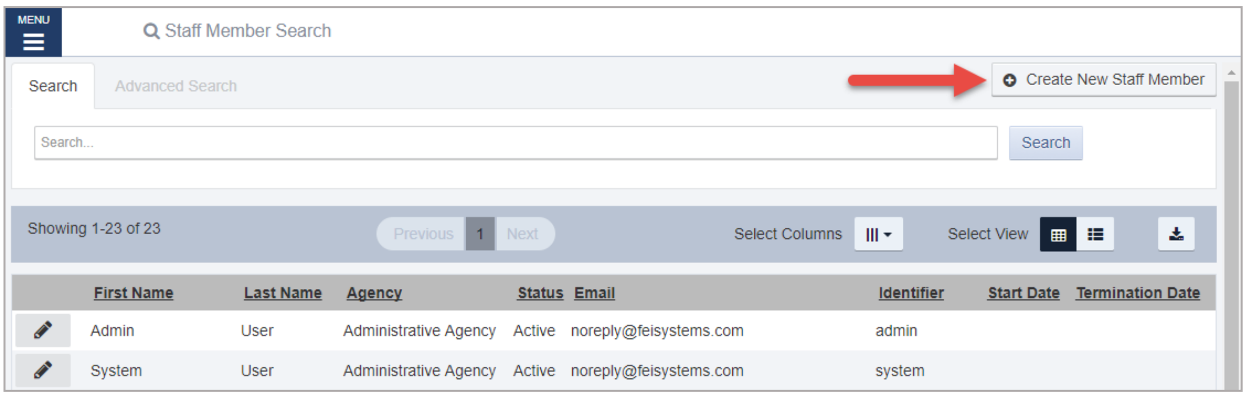


Figure 4-8: Staff Member screen

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

Table 4-5: Create New Staff Member fields

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

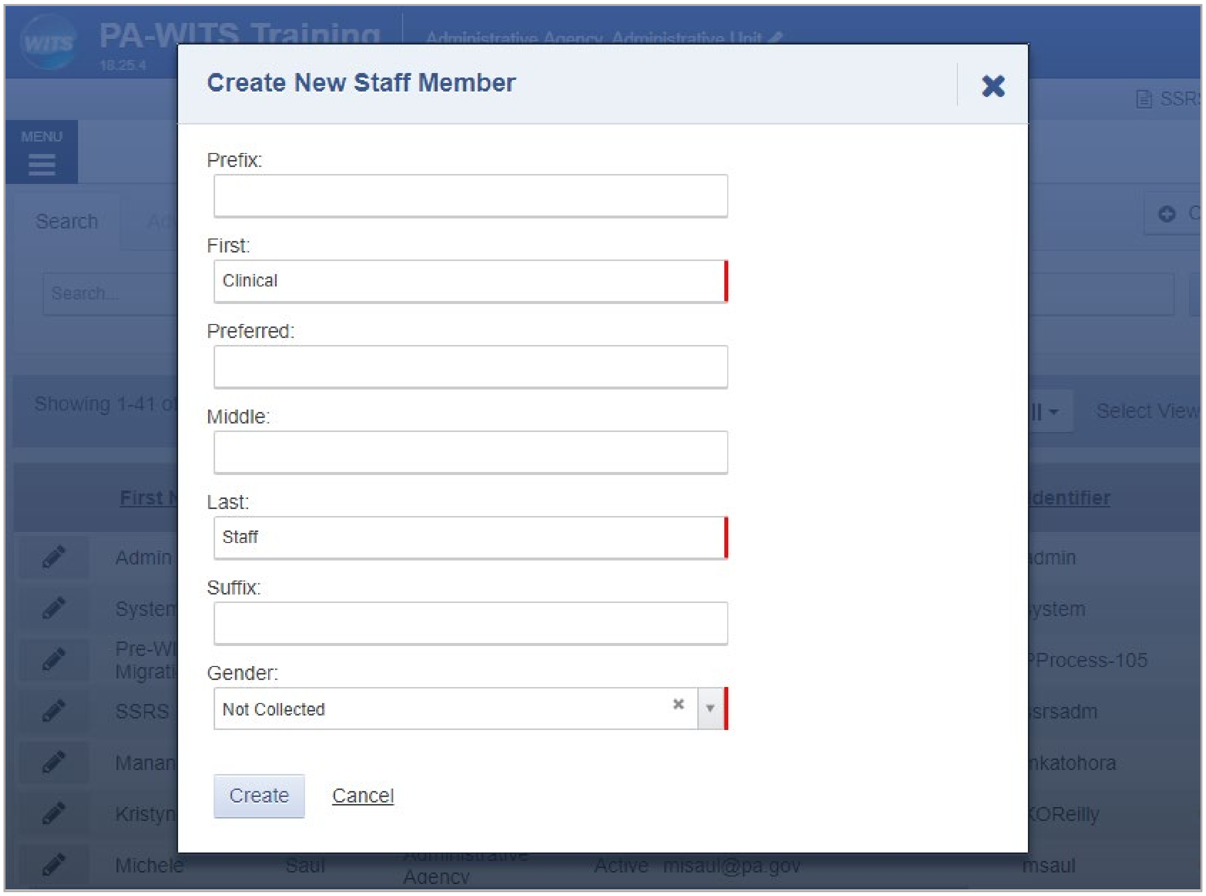


Figure 4-9: Create New Staff Member screen

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

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

Completion Requirements

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

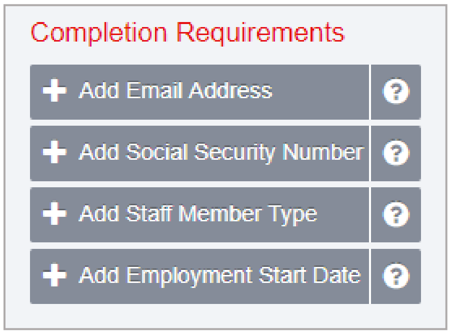


Figure 4-10: Completion Requirements

Add Email Address

1. On the Staff Member Workspace screen, point to the **Completion Requirements**.
2. Click **Add Email Address**. This will open the Contact Information panel.

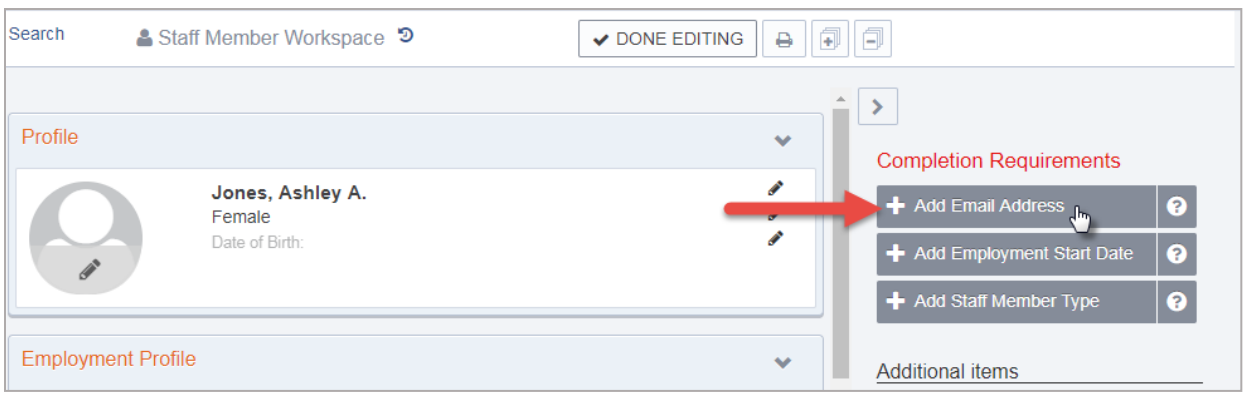


Figure 4-11: Completion Requirements, Add Employee Start Date

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

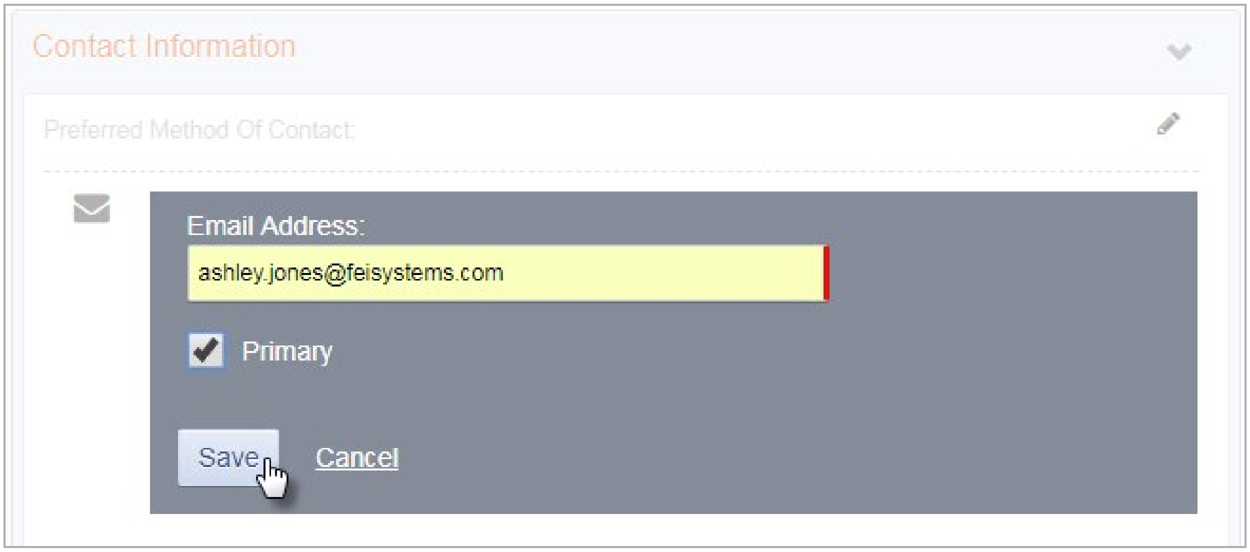


Figure 4-12: Contact Information panel, add primary email address

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

Add Employment Start Date

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

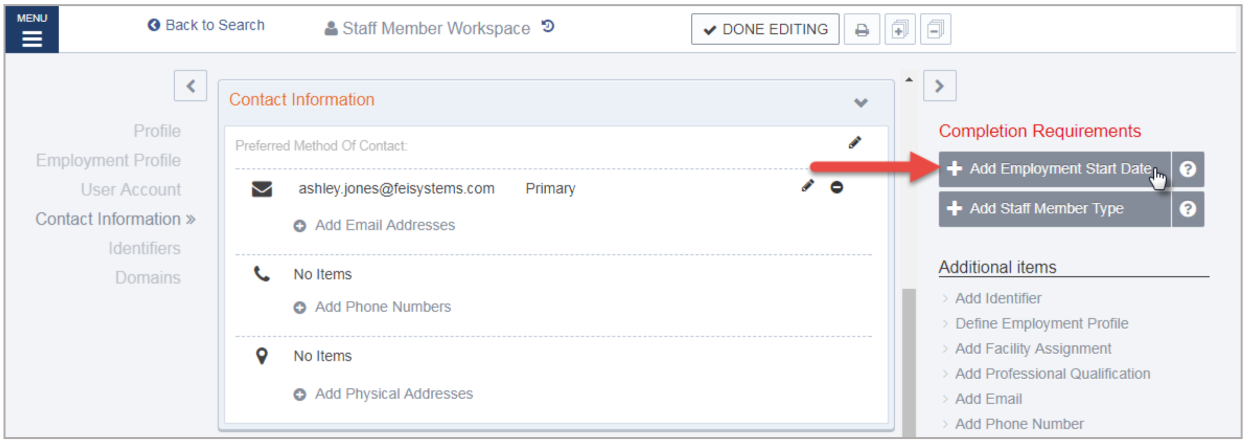


Figure 4-13: Add Employment Start Date

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

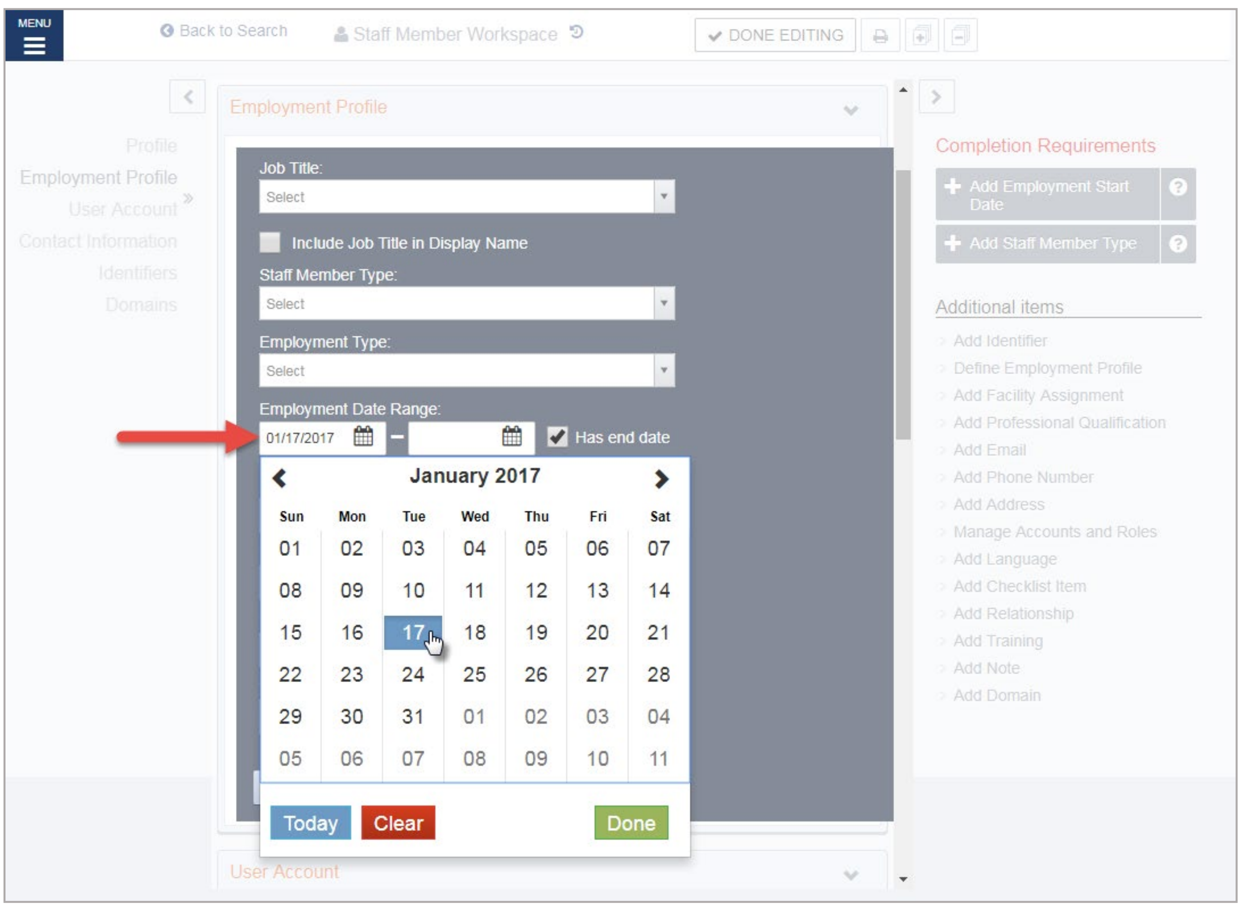


Figure 4-14: Employment Profile panel, Employment date range

Add Staff Member Type

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

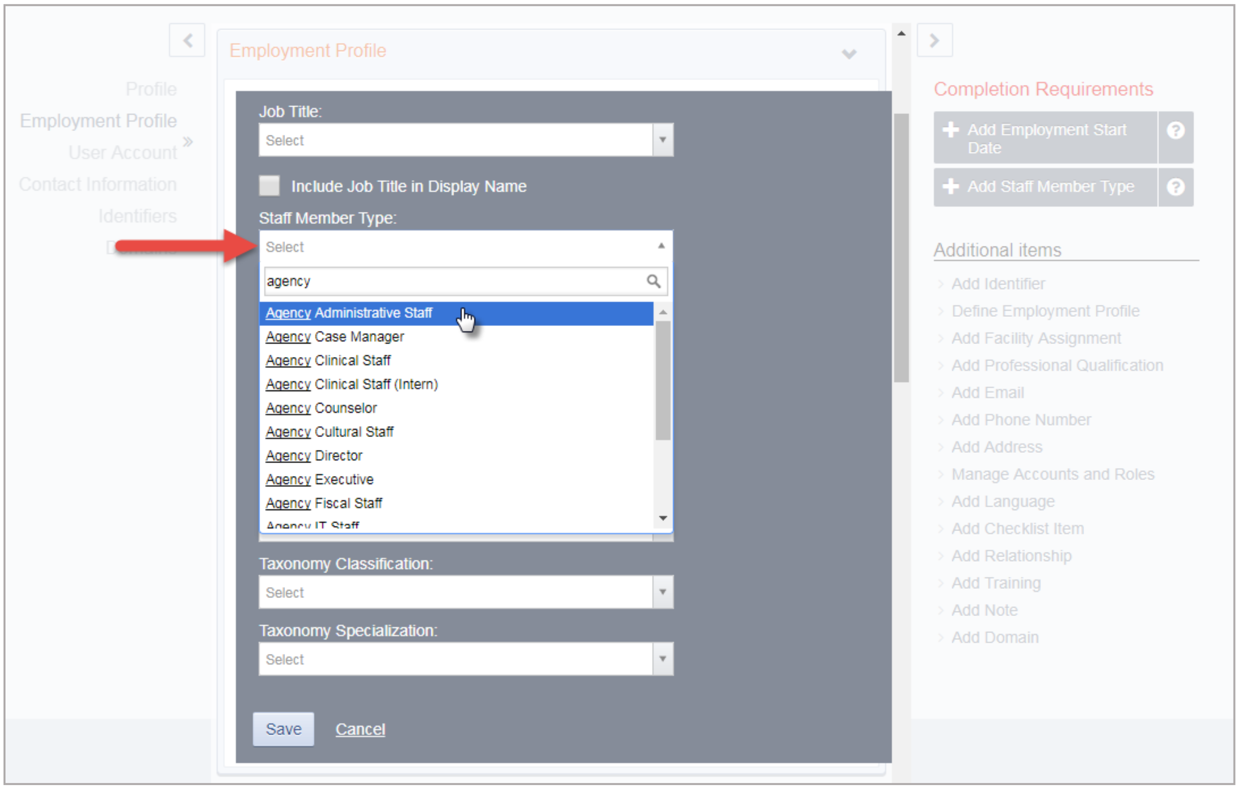


Figure 4-15: Employment Profile panel, Staff Member Type field

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

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

Add Social Security Number

1. On the Staff Member Workspace screen, point to the **Completion Requirements**.
2. Click **Add Social Security Number**. This will open the Identifiers panel.
3. On the Identifier Panel, in the **Identifier** field, enter the employee's SSN and then enter the effective date or use the calendar to select the start date.

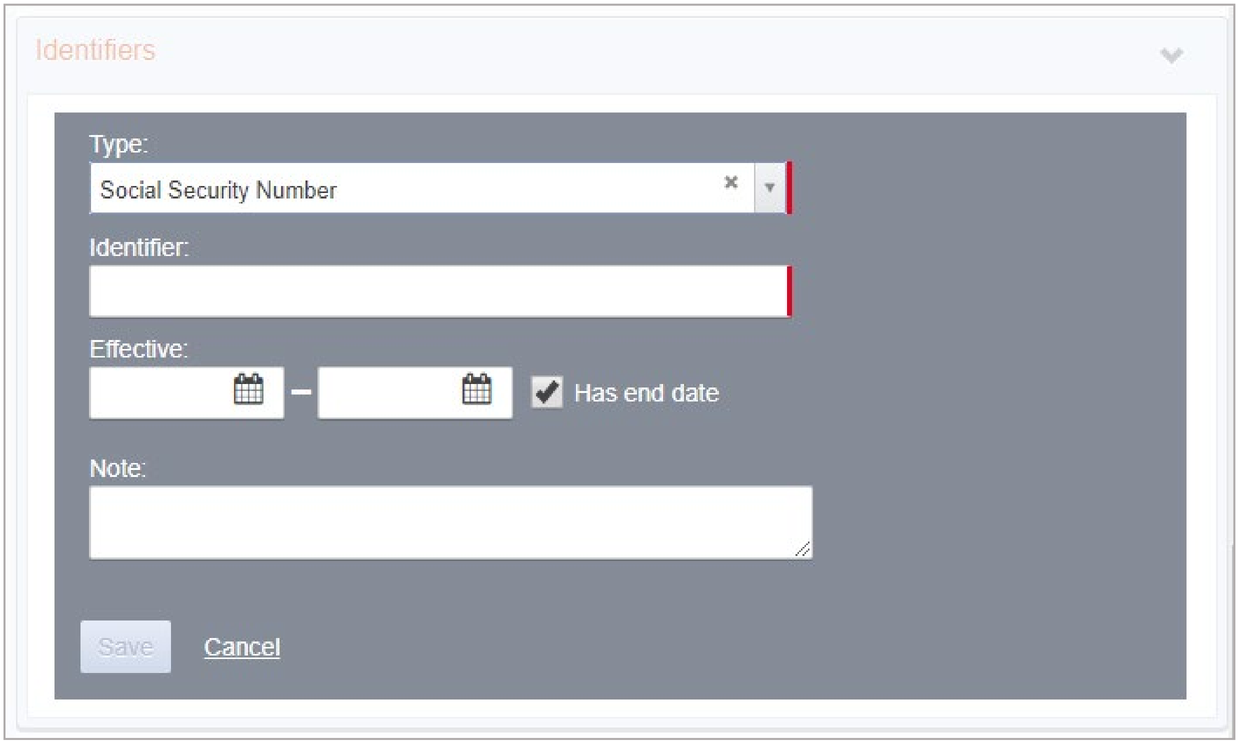


Figure 4-16: Identifiers panel

4. Click **Save**.

Add Facility Assignment

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

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

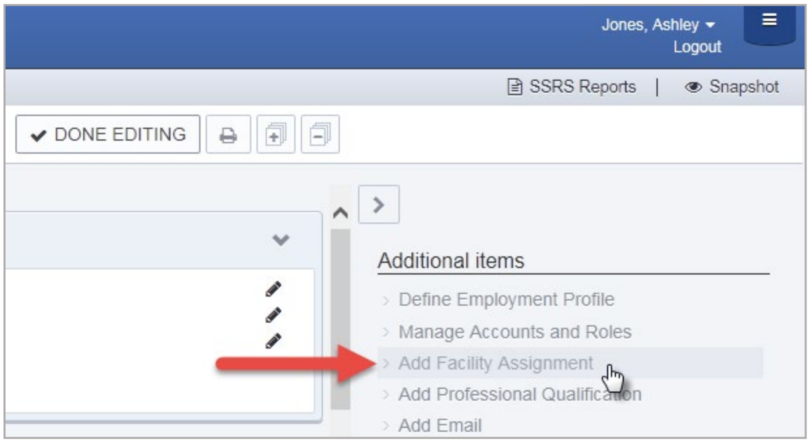


Figure 4-17: Additional Items section, Add Facility Assignment

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

3. Select the **Effective Date**.

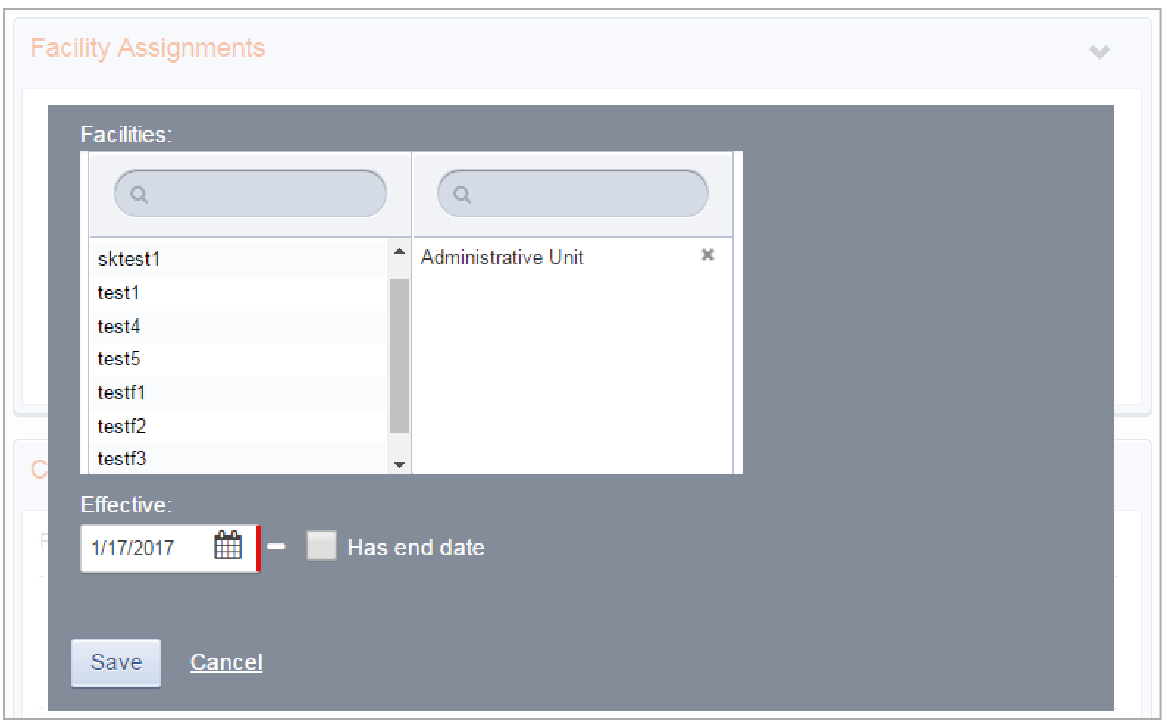


Figure 4-18: Facility Assignments panel

4. Click **Save**.

Add User Account

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

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

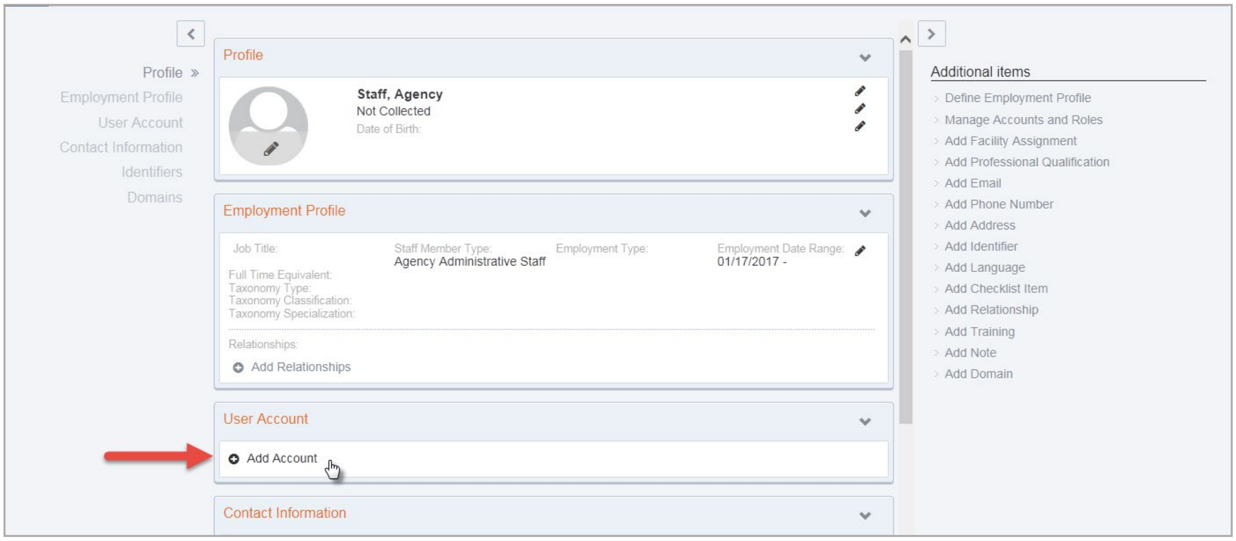


Figure 4-19: User Account panel, Add Account

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

Important: The User ID must be unique for each staff member. Once an account is created, the User ID cannot be changed. If a User ID is set up incorrectly, please refer to, *Use Case: Correcting User ID* on page 65 below.

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

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

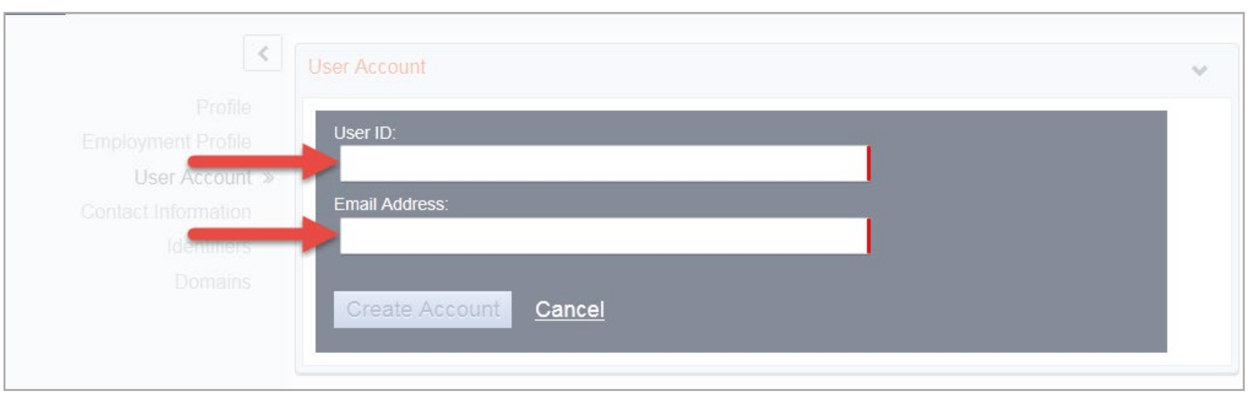


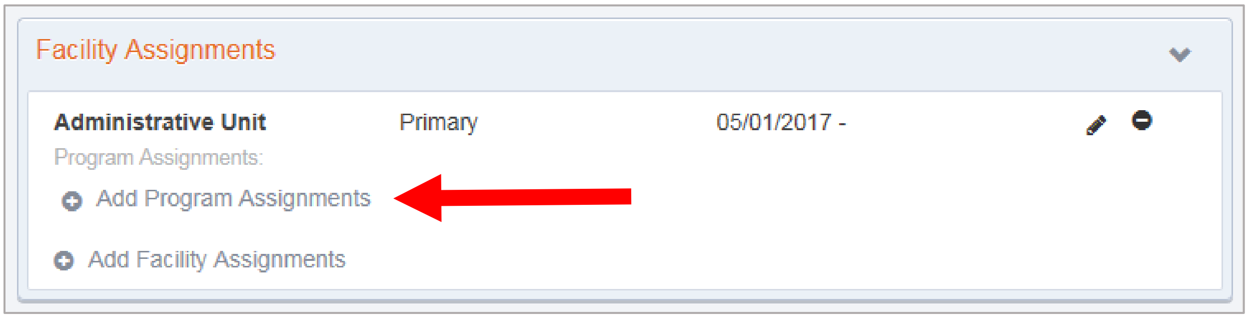
Figure 4-20: User Account panel, required fields

4. Click **Create Account**.

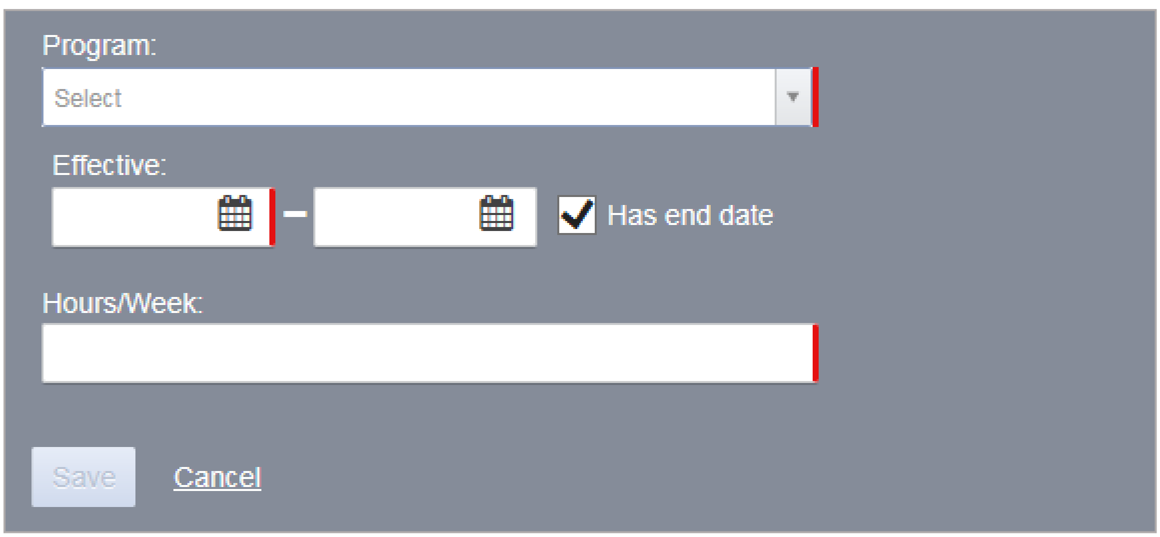
Add Program Assignment (Optional)

The Program Assignment option under Facility Assignments will allow a staff member to provide services to clients in that program. A staff member can be assigned to multiple programs, and program assignments must be made under each facility the staff member is assigned to.

1. Click **Add Program Assignments**.



2. Select a **Program** that the staff member should be assigned to
3. Enter the **Effective** date of the program assignment
4. Enter the number of **Hours/Week** the staff member will be assigned to that program.
5. Click **Save.**



User Roles

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

Table 4-6: SOR Related Roles

Role Name	Description
Grant Data Entry (Full Access)	User with this role can perform the minimum tasks related to data collection for discretionary grant. This applies only to instances using WITS only for SOR.
Reports Access	User with this role can access the WITS Reports from the left navigation.
Overdose Reversal Kits Management (Full Access)	User with this role can access the Overdose Reversal Kits Management section at the agency level. The user can view, add, edit and delete overdose reversal kits purchase, distribution and administration events.
Overdose Reversal Kits Management (Read-Only)	User with this role can access the Overdose Reversal Kits Management section at the agency level. The user can view overdose reversal kits purchase, distribution and administration events.
SPARS Extraction (Full Access)	The role has access to the SPARS Batch Errors screen under System Administration. **Note**: This role is included with the WITS Administrator role.
View GPRA Follow Up Compliance	This role allows the user to review the GPRA Follow Up Compliance Rate for one or all agencies on the GPRA Follow Up Summary screen.

Assign User Roles

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

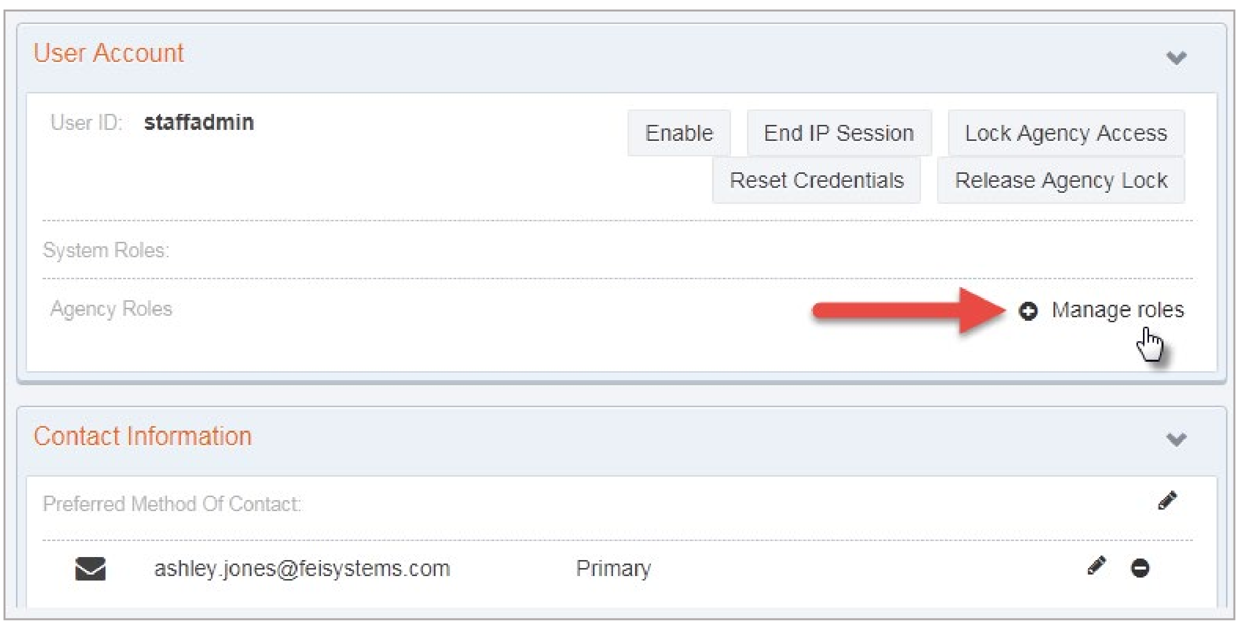


Figure 4-21: User Account panel, Manage Roles link

Manage Roles Screen: User Interface

There are two panels on the Manage Roles screen. The left panel displays a list of Available Roles, while the right panel displays a list of Assigned Roles. See Figure 4-22 for additional information about features displayed on the Manage Roles screen.

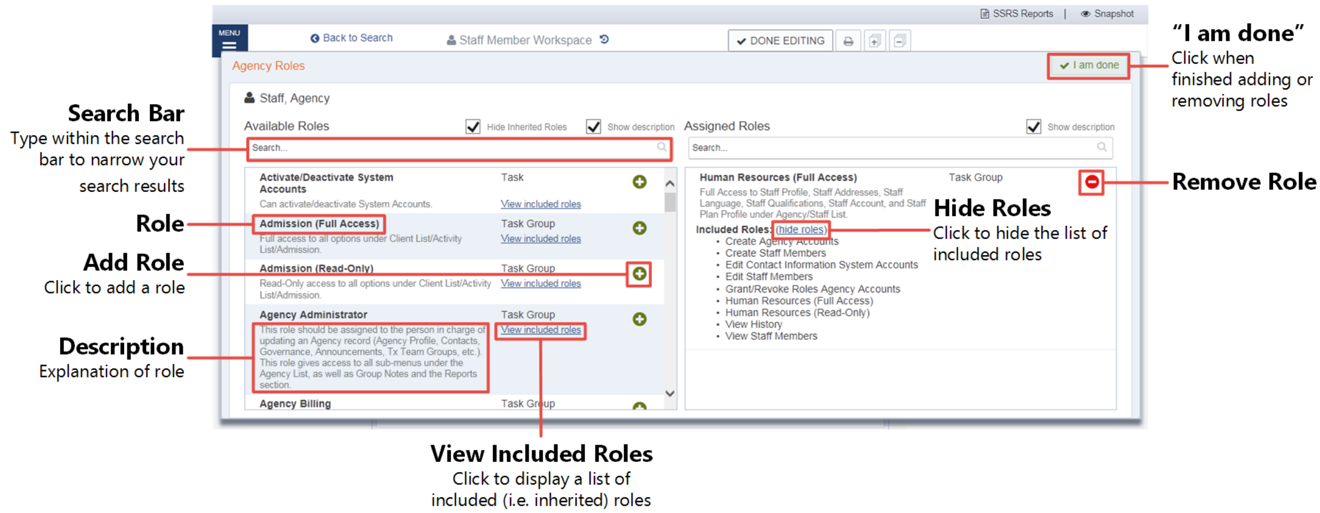
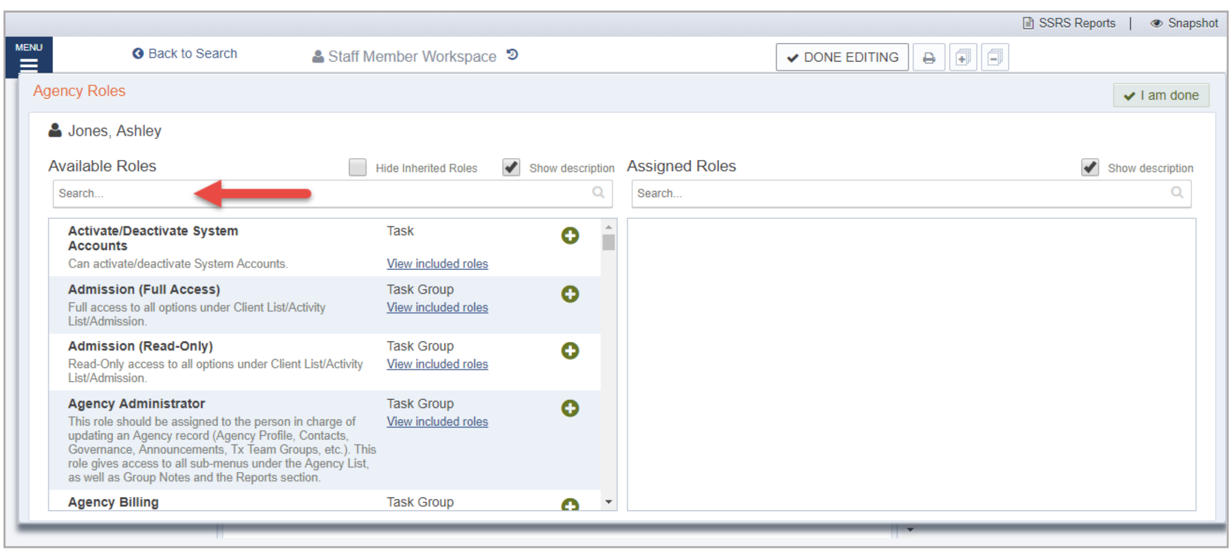


Figure 4-22: Manage Roles Screen

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



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

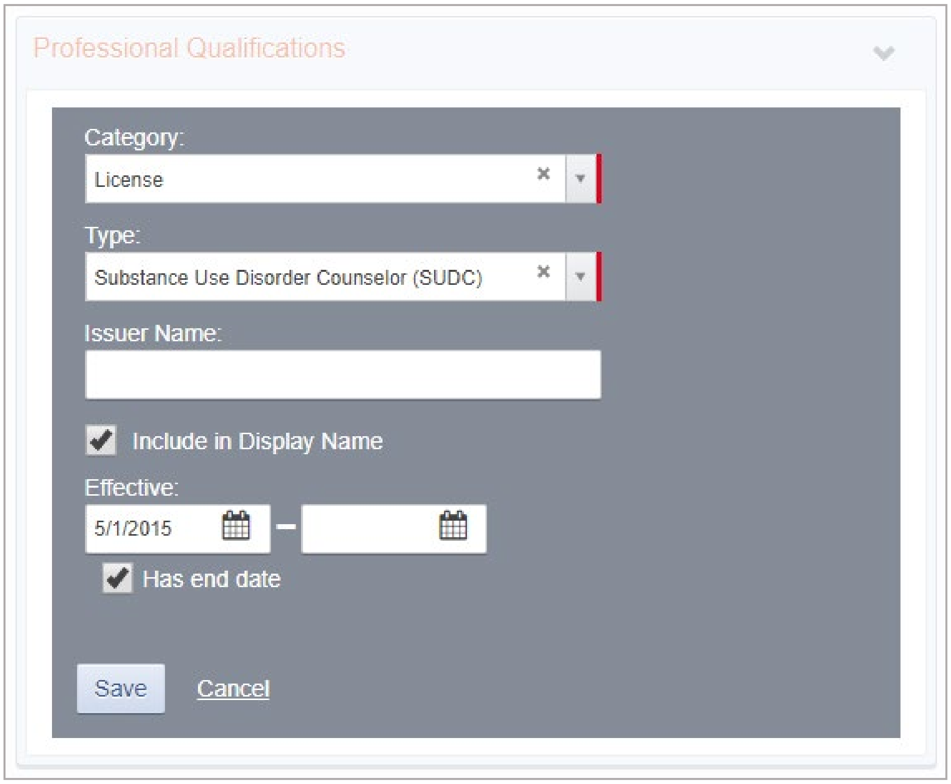
4. When finished assigning roles, click **I am done.**

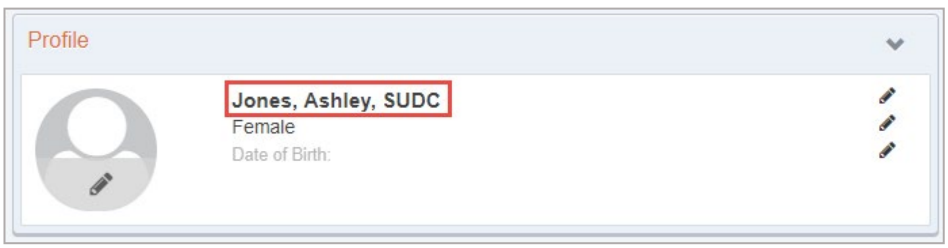
Adding additional items to a profile

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

Account Rules/Other Functionality

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





Locking Staff Member Access

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

Option 1: Staff Member Search Screen

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

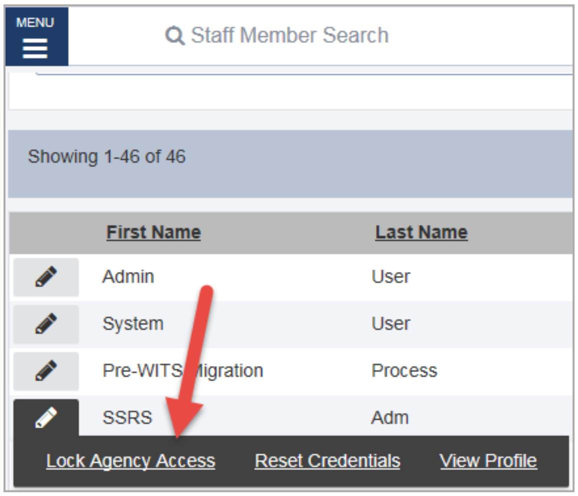
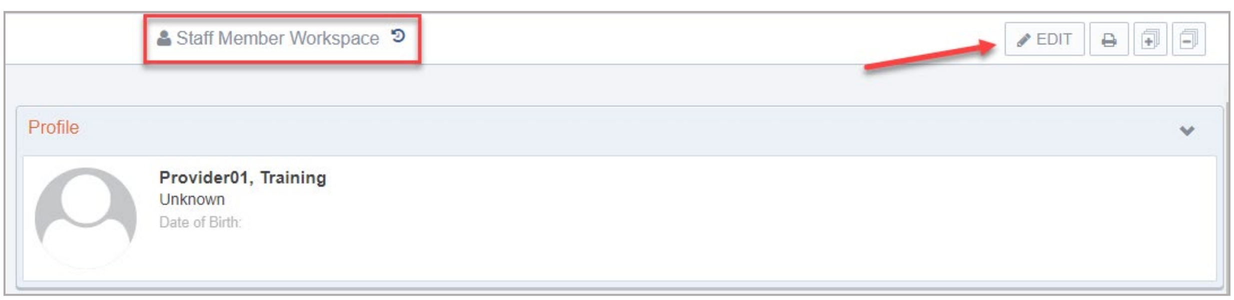


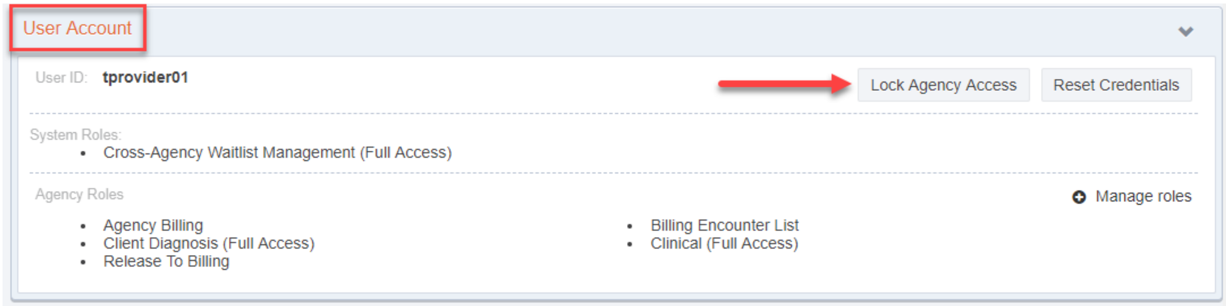
Figure 4-23: Staff Member Search Screen, Lock Agency Access

Option 2: Edit Staff Member Account

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

2. Click **Edit**.





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

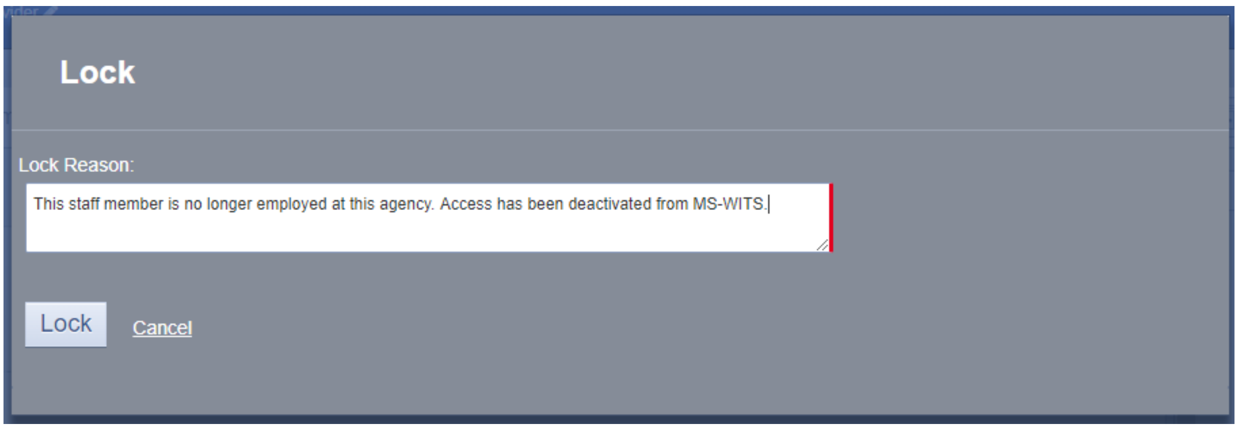
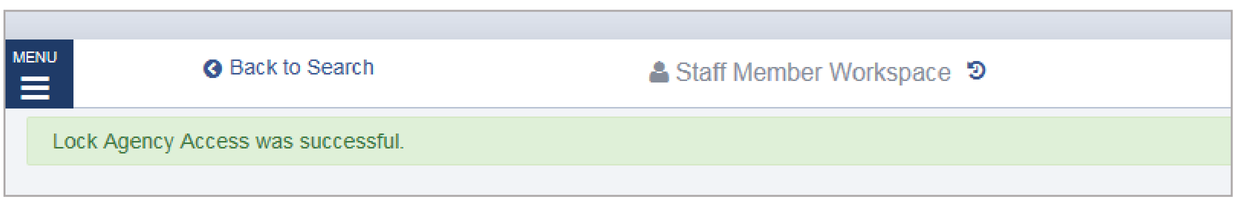
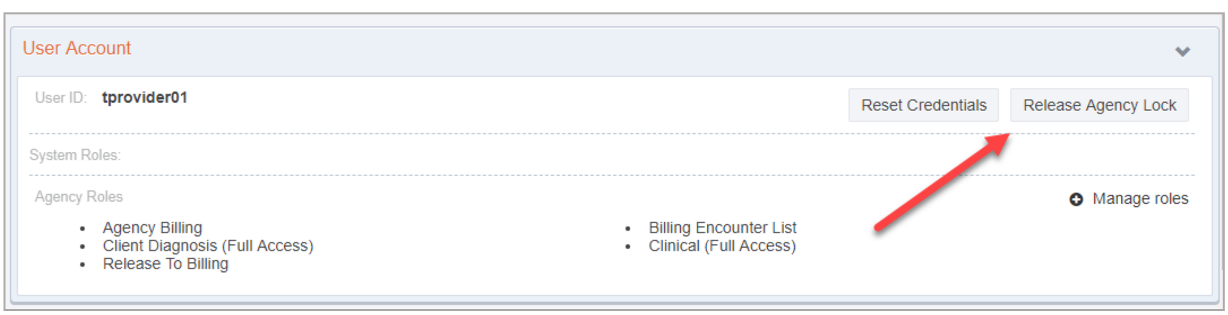


Figure 4-24: Lock Reason

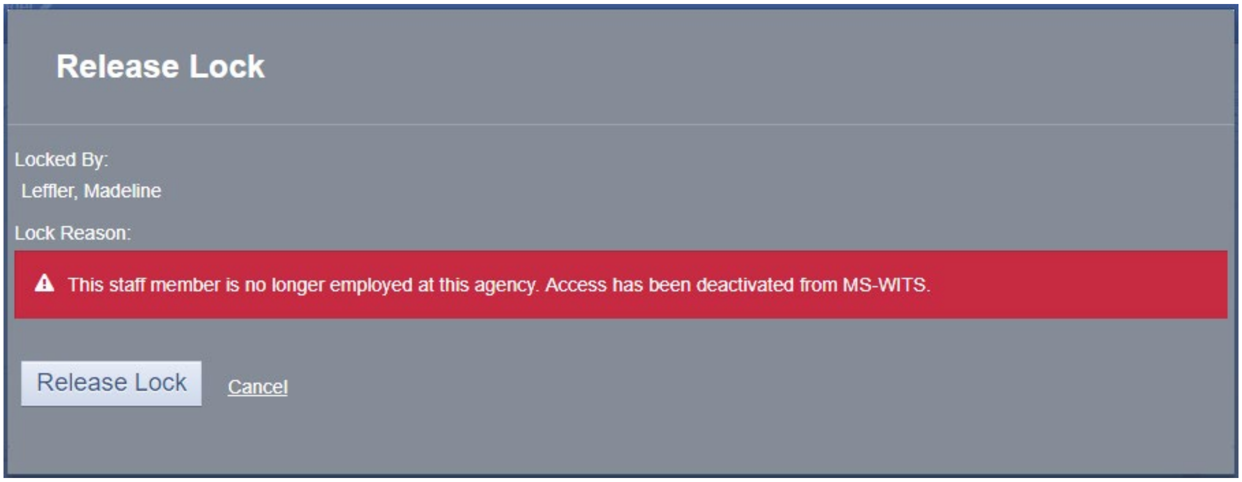
6. When you click **Lock,** the user will see the "Lock Agency Access was successful" message at the top of the workspace.



7. This staff member can no longer gain access to WITS.
8. If for some reason, you want to release this lock, a Staff Administrator can get to the Release Agency Lock from the **Staff Member Search** screen or use the **Staff Member Workspace** User Account panel to **Release Agency Lock**.



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



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

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

Troubleshooting Help for Staff Management

Use Case: Account in Use

Message: "Your Account is Already in Use"

Solution: End IP System Session

There are two (2) options available to resolve this issue.

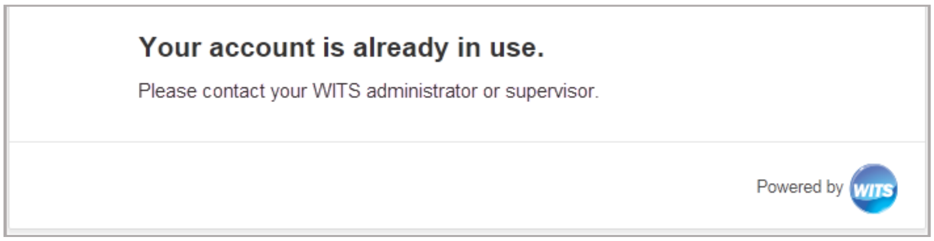


Figure 4-25: Account is already in use message

Option 1: Staff Members List

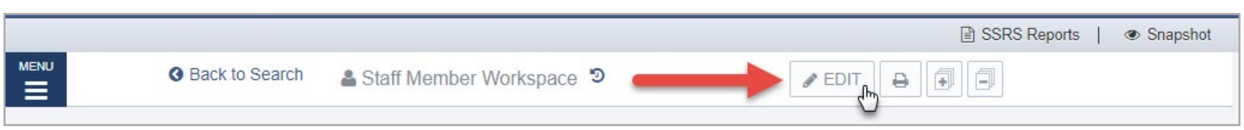
1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **End IP Session**.

2. Ask the staff member to try logging in again.

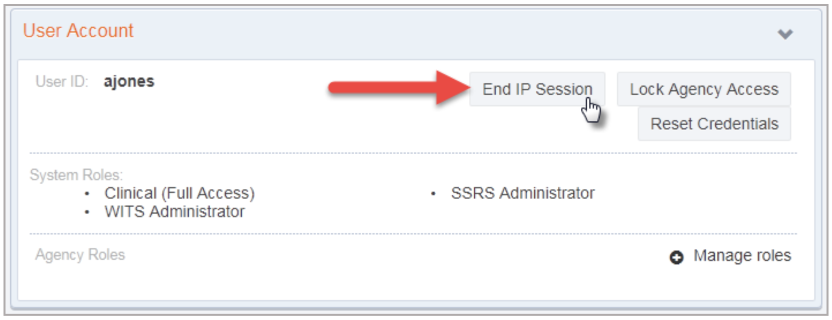
Option 2: Staff Member Profile

1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **View Profile**.

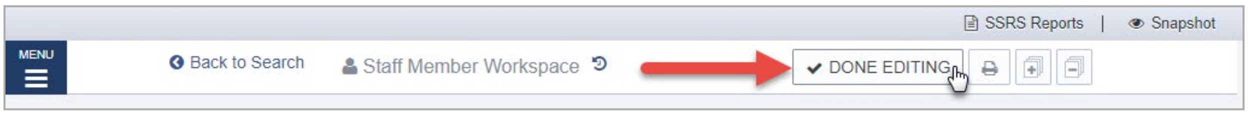
2. Click **Edit**.



3. In the User Account panel, click **End IP Session**.



4. Click **Done Editing**.



5. Ask the staff member to try logging in again.

Use Case: Disabled Account

Message: “You Have Exceeded the Maximum Number of Log-in Attempts”

Solution: Enable account

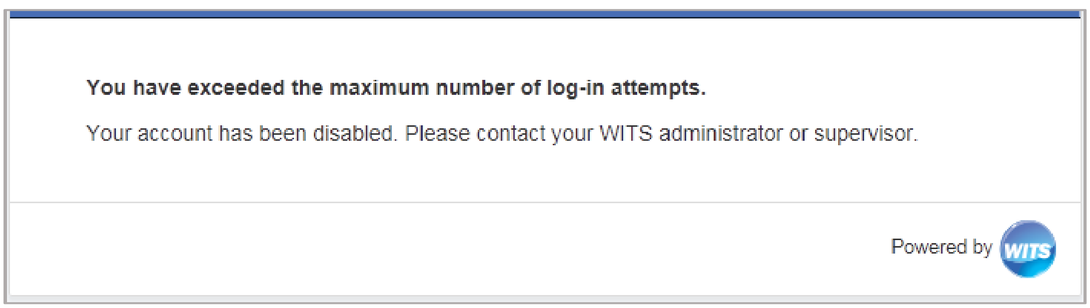
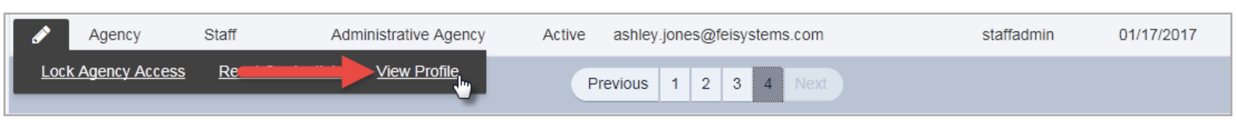
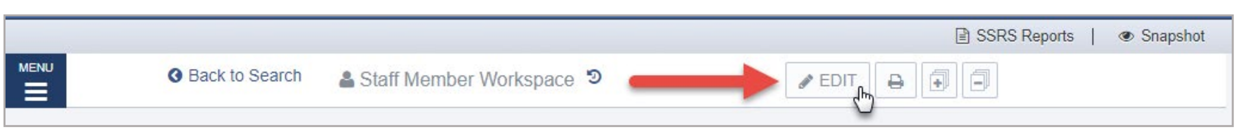


Figure 4-26: You Have Exceeded the Maximum Number of Log-in Attempts

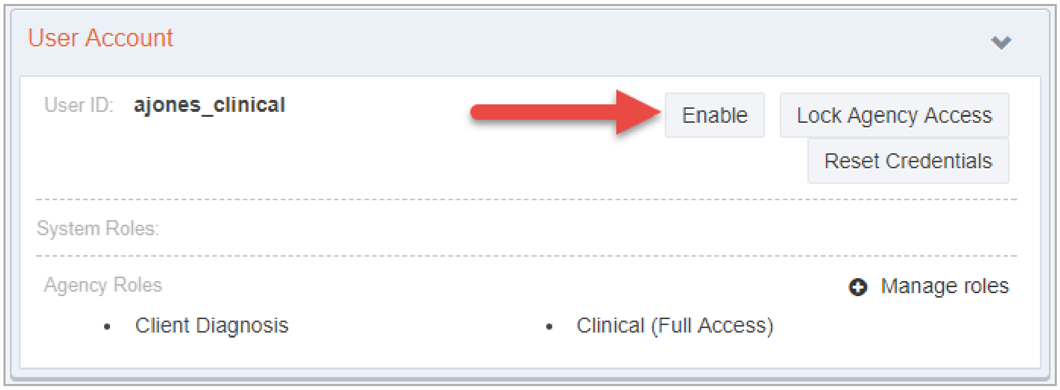
1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **View Profile**.



2. Click **Edit**.



3. In the User Account panel, click **Enable**.


User Account
User ID: ajones_clinical
Enable
Lock Agency Access
Reset Credentials
System Roles:
Agency Roles
Manage roles
Client Diagnosis
Clinical (Full Access)

Use Case: Reset Credentials Link Expired

Message: "Your Reset Credentials Link Has Expired"

Solution: Reset Credentials

There are two (2) options available to resolve this issue.

Figure 4-27: Your reset credentials link has expired

Note: When resetting credentials, the staff member will receive an email containing a link to reset their credentials. Please note this link will remain active for 24 hours. If the staff member is unable to reset their credentials within that timeframe, they will need their credentials reset again.

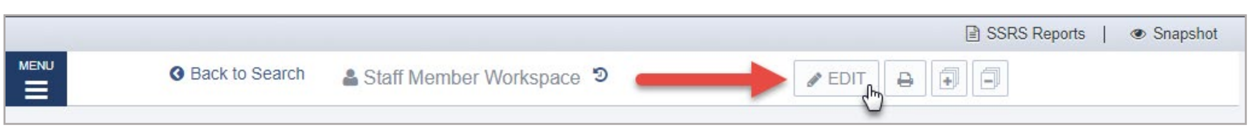
Option 1: Staff Members List

1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **Reset Credentials**.

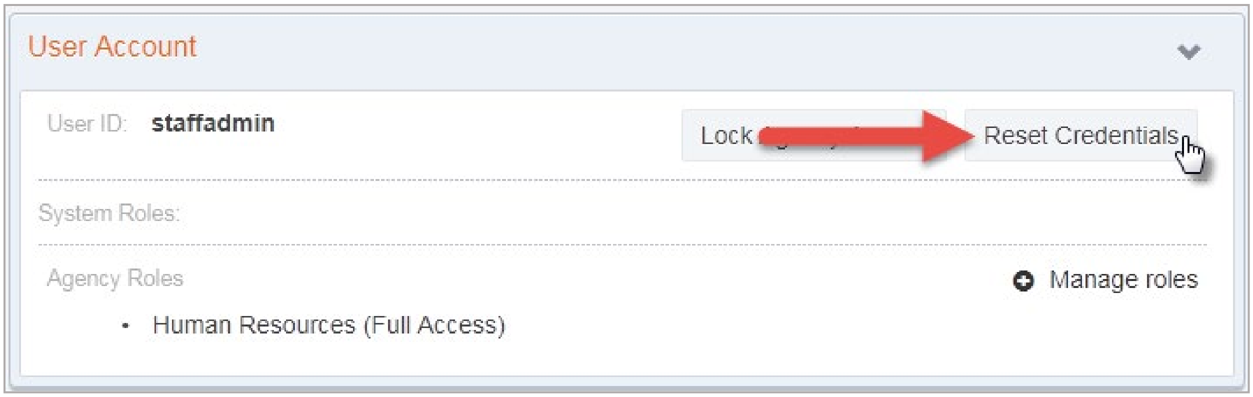
Option 2: Staff Member Profile

1. On the **Staff Members** list, locate the staff member, point to the pencil icon and then click **View Profile**.

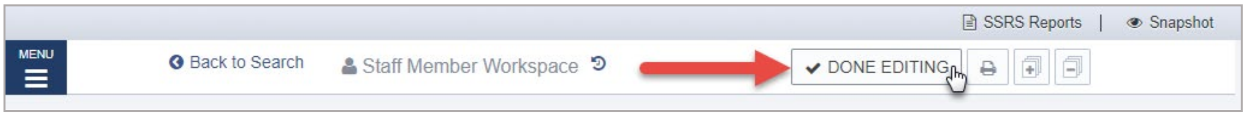
2. Click **Edit**.



3. In the User Account panel, click **Reset Credentials**.



4. Click **Done Editing**.



Use Case: Correcting User ID

Note: to perform this correction, this System Account role is needed: **Can Associate/Dissociate Agency Account**

If a staff member was assigned an incorrect User ID, or needs to update their current User ID, this action can be performed by dissociating the current User ID and then associating a new User ID with the staff member's account.

Part 5: System Administration

Code Table Management

***Where:* System Administration > Code Tables**

WITS makes use of code tables allowing for a great deal of flexibility within each State's implementation. There are over 150 code tables within WITS that can be modified by the WITS Administrator.

Once data has been added to the code table, the new value will be available to select within the associated field(s). To remove a value to a code table, set an expiration date for when the value should not be available anymore. For certain values, there may be "negative IDs" (e.g., -101). This means there are business rules tied to the value and are not editable by WITS Administrators.

Note: Some values displayed within drop-down fields cannot be updated through the Code Table Editor. Most code tables can be identified by the Code Table name. If you have a question or need help locating a specific Code Table, please contact WITS Production Support for assistance and reference the screen and field you would like to update.

View/Modify Code Table Values

Follow the steps below to locate and edit code table values.

1. From the left menu, select **System Administration**, and then click **Code Tables**.
2. On the **Code Tables** screen, select the desired code table by scrolling through the dropdown menu or by typing the code table name, then click **Go**.

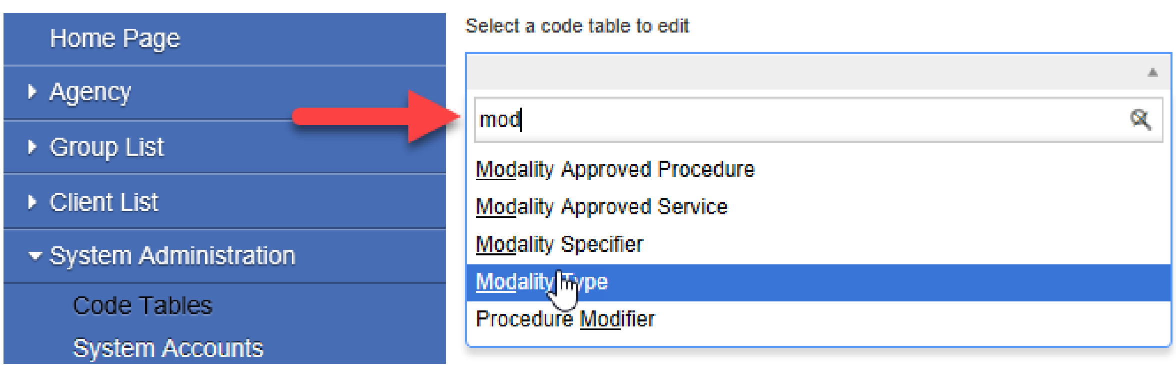


Figure 5-1: Code Tables Search screen

3. To edit a row, click the **Review** link under the Actions column, or to add a new record, click on the **New** link.

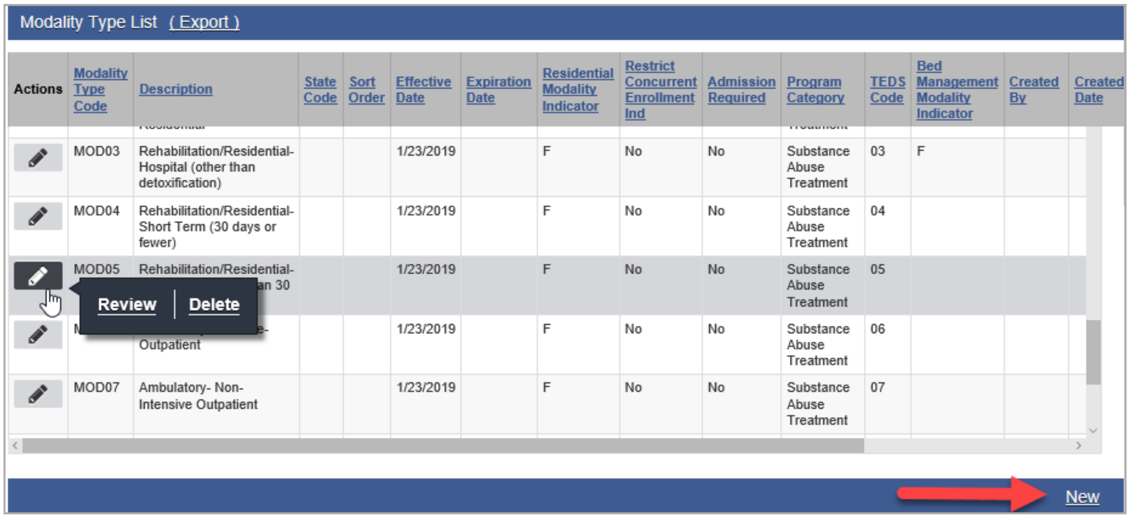


Figure 5-2: Code Table List screen, Review and New links

4. Notice that the bottom half of the screen becomes active. You may now continue and enter in the values for the selected code table.

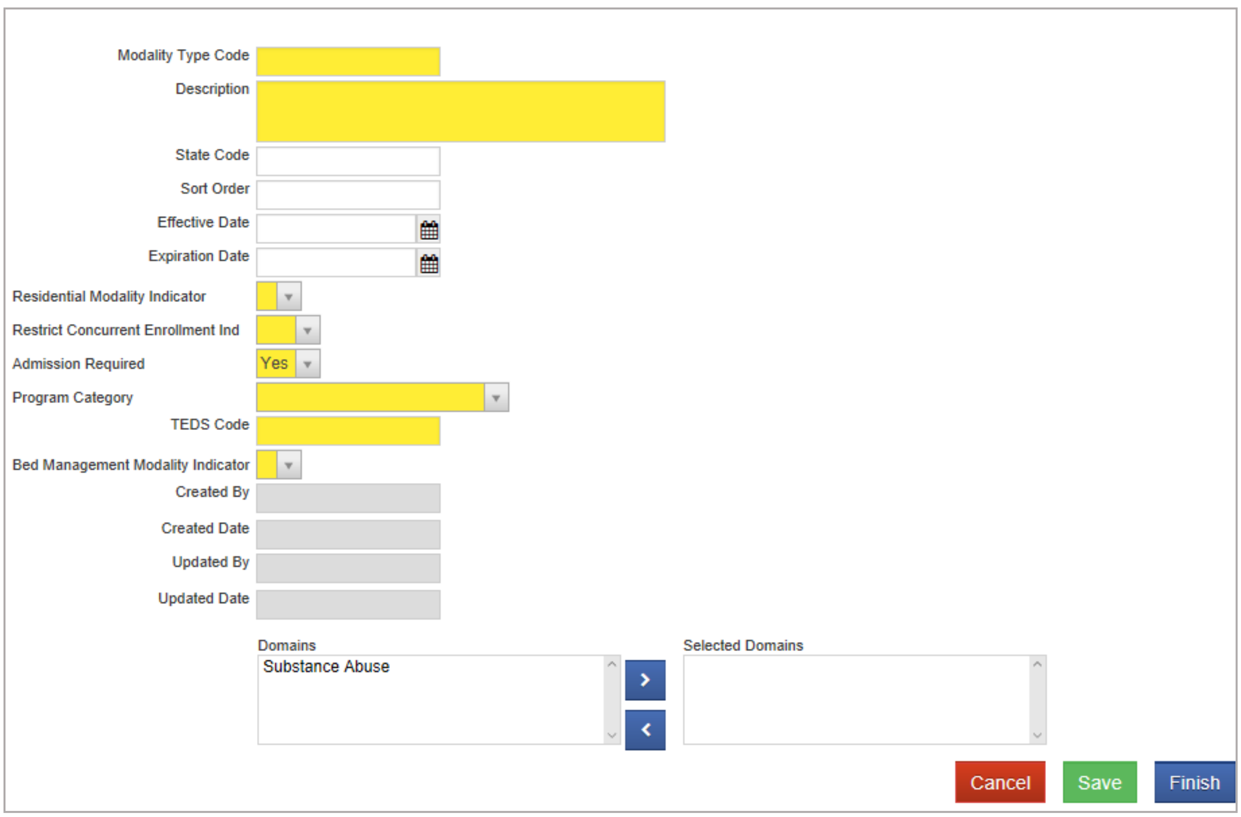


Figure 5-3: Editing an existing Code Table Value

5. When finished, click **Finish** to save your changes and return to the code table list.

Code Table Reference (SOR Grant)

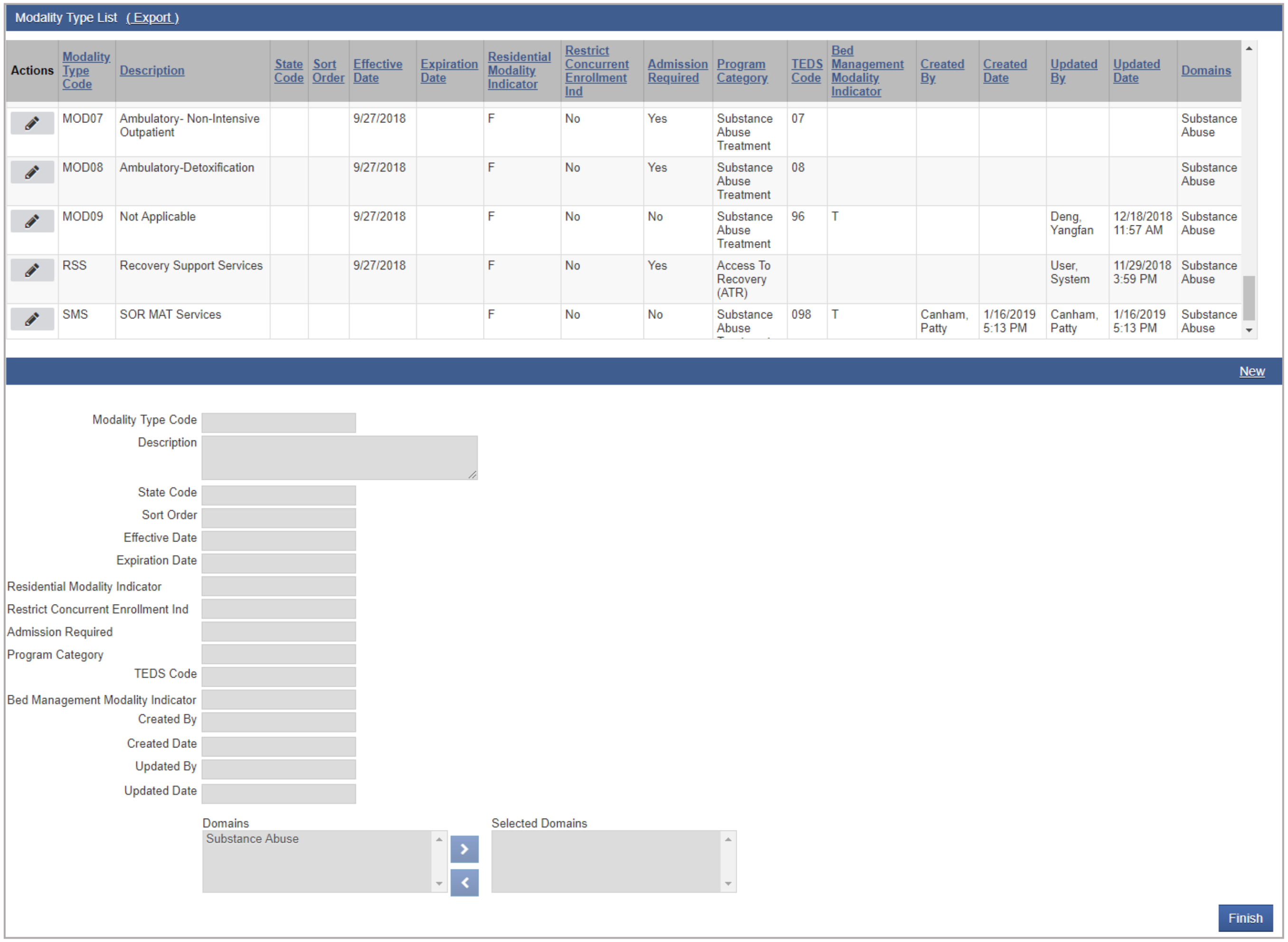
Code Tables Relevant to the SOR Grant. FEI has pre-loaded a number of values to all of the code tables based on feedback received from customers

Table 5-1: SOR Relevant Code Tables

Code Table Name	Applicable Screen(s)	Description
Evidence Base Practices	Program Setup; Encounter	If collecting Evidence Base Practices (EBPs) on encounters, a list of appropriate practices needs to be added as code table values. Once added to the code table, these practices will be available to select on the Program Setup screen and Encounter screen.
Modality Type List	Program Setup	WITS Standard SOR does not support TEDS reporting, and associated admission/discharge workflow. SOR programs need to have a Modality type that does not require Admission/Discharge. This is determined by the **Admission Required** field in this code table. **Admission Required** • **No:** Use this value for SOR programs. • **Yes:** Used for non-SOR programs that need admission/discharge workflow to support TEDS reporting**.**
Modality Specifier	Program Setup	The Modality Specifier named, “Medication Assisted Treatment” (-107), will display a dual list box on encounters, allowing staff to select one or more medication-assisted treatments used for the client. **Note**: Values displayed in this dual list box are found in the code table named, “Cd Medication Assisted Treatment List”.
Medication Assisted Treatment List	Encounter; GPRA Follow-up and Discharge Interviews	This code table has been loaded with values that are consistent with the new SOR GPRA tool. The GPRA Discharge and Follow-up alcohol use disorder (AUD) and opioid use disorder (OUD) questions will be prepopulated with the medication information entered in the client SOR encounters across the grant episode, within the past 30 days. This will apply only if the interview is conducted, if the GPRA Discharge or Follow-up interviews are not conducted then the screen is skipped so no need to prepopulate.
Service Location	Program Setup; Encounter	Indicates the Service Location for encounters. The default Service Location values for encounters for a facility (e.g. Office) can be established on the facilities’ program setup.
Referral Source	Intake	Indicates the source of the referral (e.g. Self, Justice, etc.)
County	Agency Profile; Intake	List of the State’s counties. Used to define the provider agency’s county and the client’s county.
Procedure	Services	If using encounters, this contains procedures needed to create services that are referenced on the encounter.
Procedure Modifier	Services	Services are defined by a unique combination of Procedure, Procedure Modifier and Service Description. This code table allows the WITS administrators to define modifiers needed to support those unique combinations
Sexual Orientation	Client Additional Information	This code table has been loaded with values that are consistent with the new SOR GPRA tool. Recommend that WITS Administrators do not modify, unless SAMHSA publishes new values in the future.

Code Table Name	Applicable Screen(s)	Description
Ethnicity	Client Additional Information	This code table has been loaded with values that are consistent with the new SOR GPRA tool. Recommend that WITS Administrators do not modify, unless SAMHSA publishes new values in the future.
Race	Client Additional Information	This code table has been loaded with values that are consistent with the new SOR GPRA tool. Recommend that WITS Administrators do not modify, unless SAMHSA publishes new values in the future.
Veteran Status	Client Additional Information	This code table has been loaded with values that are consistent with the new SOR GPRA tool. Recommend that WITS Administrators do not modify, unless SAMHSA publishes new values in the future.

Code Table: Modality Type



Modality Type List (Export)

Actions	Modality Type Code	Description	State Code	Sort Order	Effective Date	Expiration Date	Residential Modality Indicator	Restrict Concurrent Enrollment Ind	Admission Required	Program Category	TEDS Code	Bed Management Modality Indicator	Created By	Created Date	Updated By	Updated Date	Domains
	MOD07	Ambulatory- Non-Intensive Outpatient			9/27/2018		F	No	Yes	Substance Abuse Treatment	07						Substance Abuse
	MOD08	Ambulatory-Detoxification			9/27/2018		F	No	Yes	Substance Abuse Treatment	08						Substance Abuse
	MOD09	Not Applicable			9/27/2018		F	No	No	Substance Abuse Treatment	96	T			Deng, Yangfan	12/18/2018 11:57 AM	Substance Abuse
	RSS	Recovery Support Services			9/27/2018		F	No	Yes	Access To Recovery (ATR)					User, System	11/29/2018 3:59 PM	Substance Abuse
	SMS	SOR MAT Services					F	No	No	Substance Abuse	098	T	Canham, Patty	1/16/2019 5:13 PM	Canham, Patty	1/16/2019 5:13 PM	Substance Abuse

New

Modality Type Code
Description
State Code
Sort Order
Effective Date
Expiration Date
Residential Modality Indicator
Restrict Concurrent Enrollment Ind
Admission Required
Program Category
TEDS Code
Bed Management Modality Indicator
Created By
Created Date
Updated By
Updated Date

Domains
Substance Abuse

Selected Domains

Finish

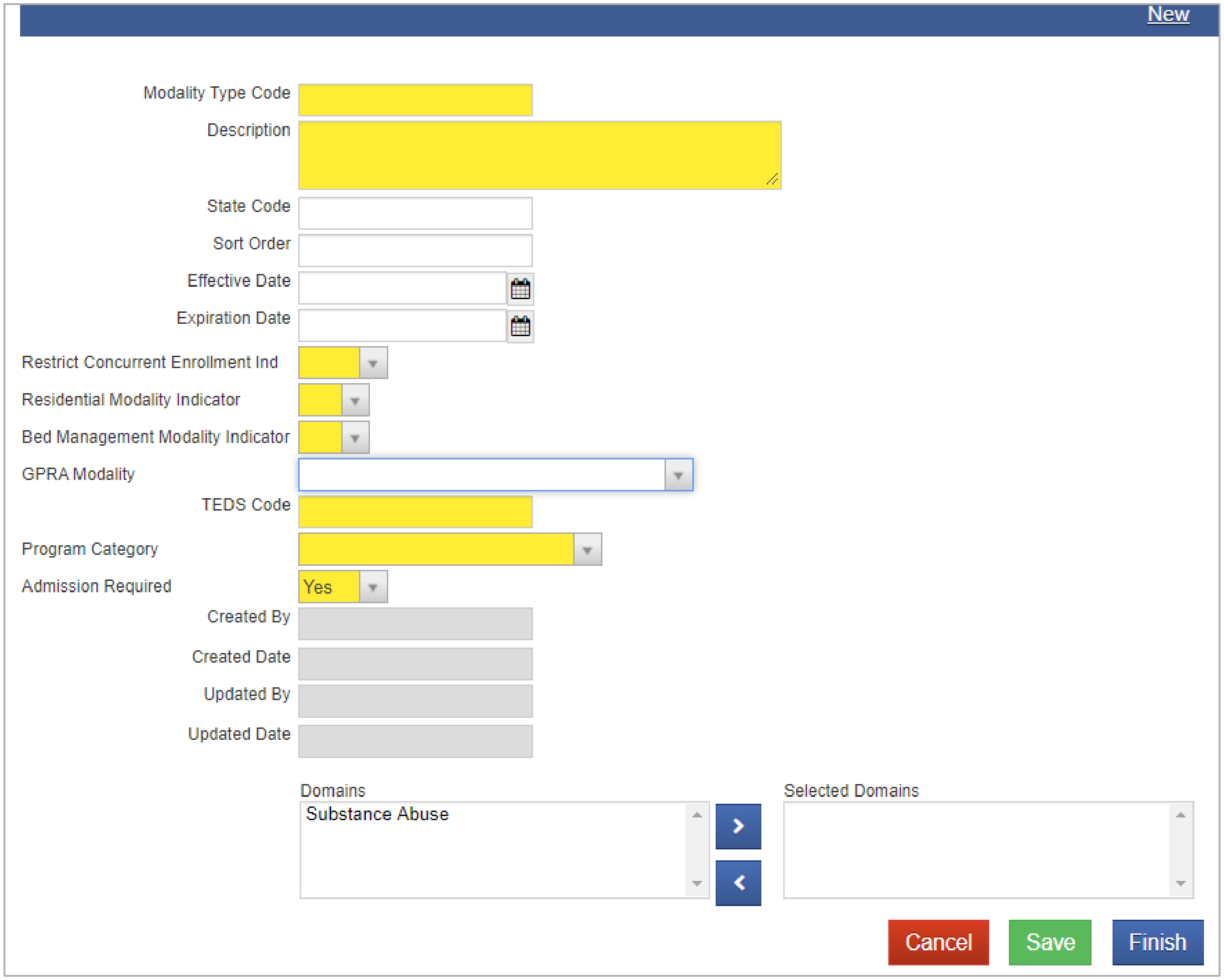
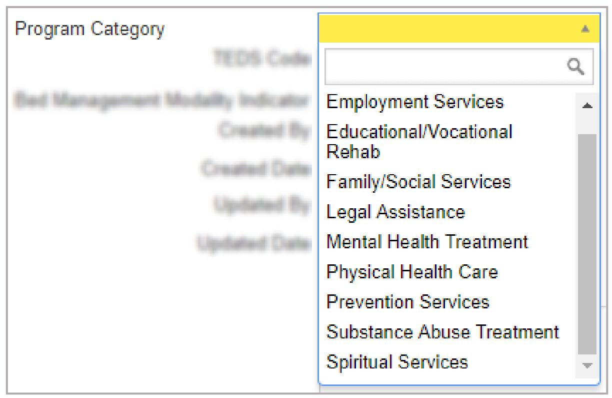
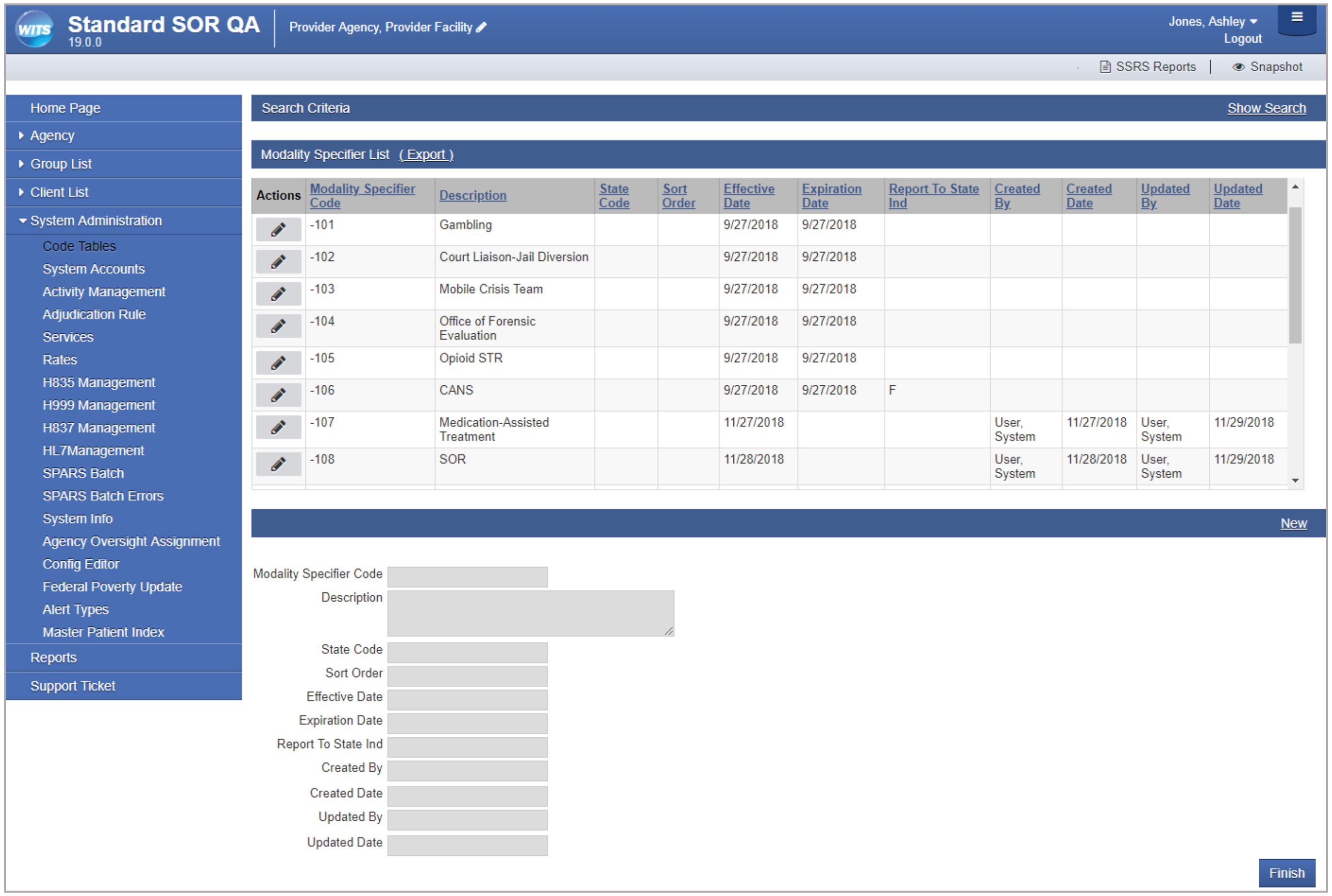


Table 5-2: Modality Type Code Table fields

Field	Description
Modality Type Code	Type a code for this Modality Type.
Description	Type the description for this Modality Type.
State Code	(Optional) Type a value if applicable.

Field	Description
Sort Order	(Optional) This field is used to control how these values are listed in drop-down fields.
Effective Date	(Optional)
Expiration Date	(Optional)
Restrict Concurrent Enrollment Ind.	For SOR, select No.
Residential Modality Indicator	For SOR, select F (False).
Bed Management Modality Indicator	For SOR, select F (False).
GPRA Modality	Select the GPRA Modality for this Modality Type. This is optional. Map the modality type to GPRA Modality only if it applies. Any modality type mapped to a GPRA Modality will allow for pre-populating the services received on the GPRA discharge.
TEDS Code	Type the TEDS code for this Modality Type.
Program Category	Select an option from the drop-down field. 
Admission Required	For SOR, select No if you do not wish to collect TEDS data for SOR clients.
Selected Domains	Select options from the box and use the mover buttons to add or remove the Domain options. For SOR, select Substance Abuse.

Code Table: Modality Specifier



Code Table: Medication Assisted Treatment List

In **Section A. Record Management - Behavioral Health Diagnoses**, the alcohol use disorder (AUD) and opioid use disorder (OUD) questions for GPRA Discharge and Follow-up interviews will be prepopulated with the medication information entered in the client SOR encounters across the grant episode, within the past 30 days. This will apply only if the interview is conducted, if the GPRA Discharge or Follow-up interviews are not conducted then the screen is skipped so no need to prepopulate.

GPRA Medications have been mapped to medication assisted treatment values as shown in Table 5-3: GPRA Medication Mapping below. In the code table editor, negative IDs for medication assisted treatment values have been removed so administrators can manage their own values.

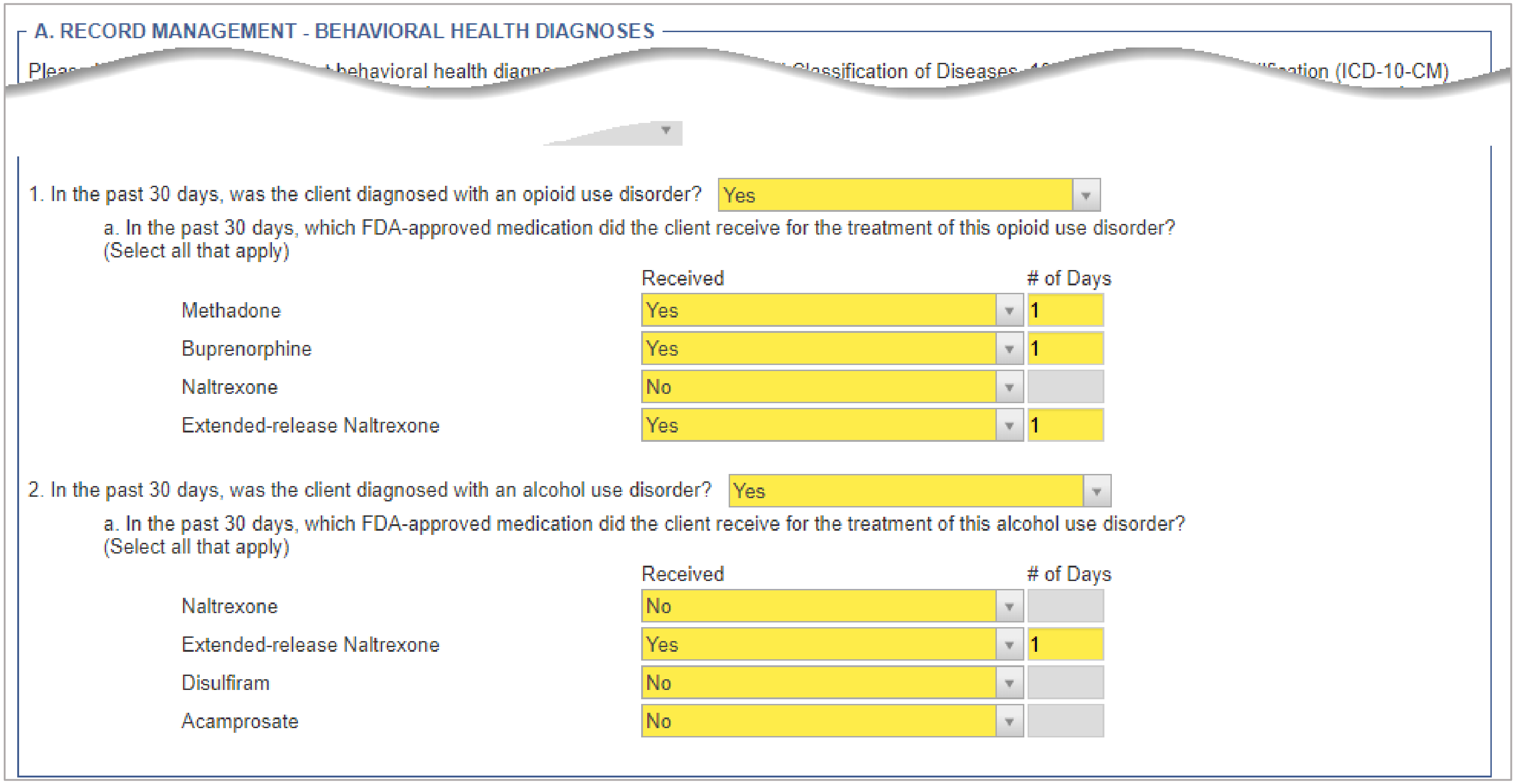
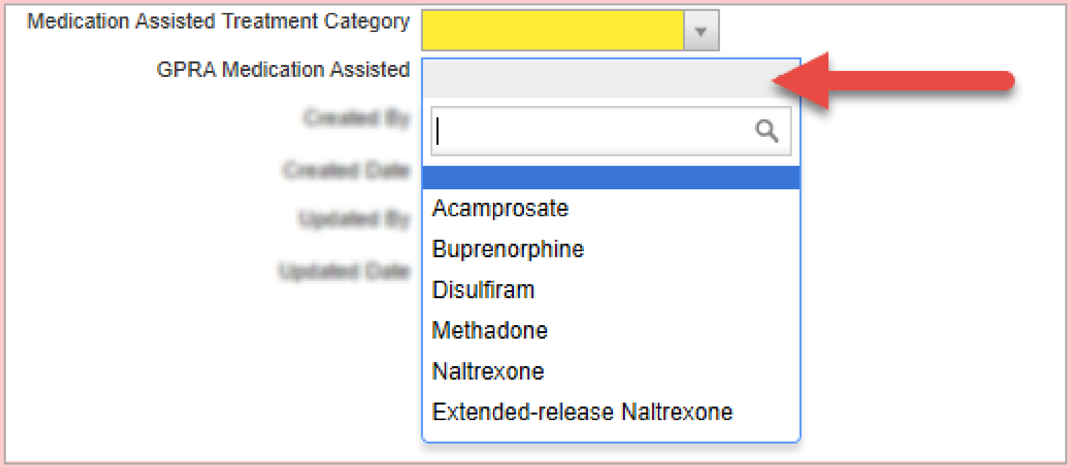


Figure 5-4: GPRA Follow-up Interview, Section A, questions 1a and 2a, prepopulated values

Important: If administrators decide to add new medications to this list, make sure those new values are mapped to a GPRA medication so it will be prepopulated on the GPRA interviews. To add the mapping, complete the optional **GPRA Medication Assisted** field by selecting an option from the list.

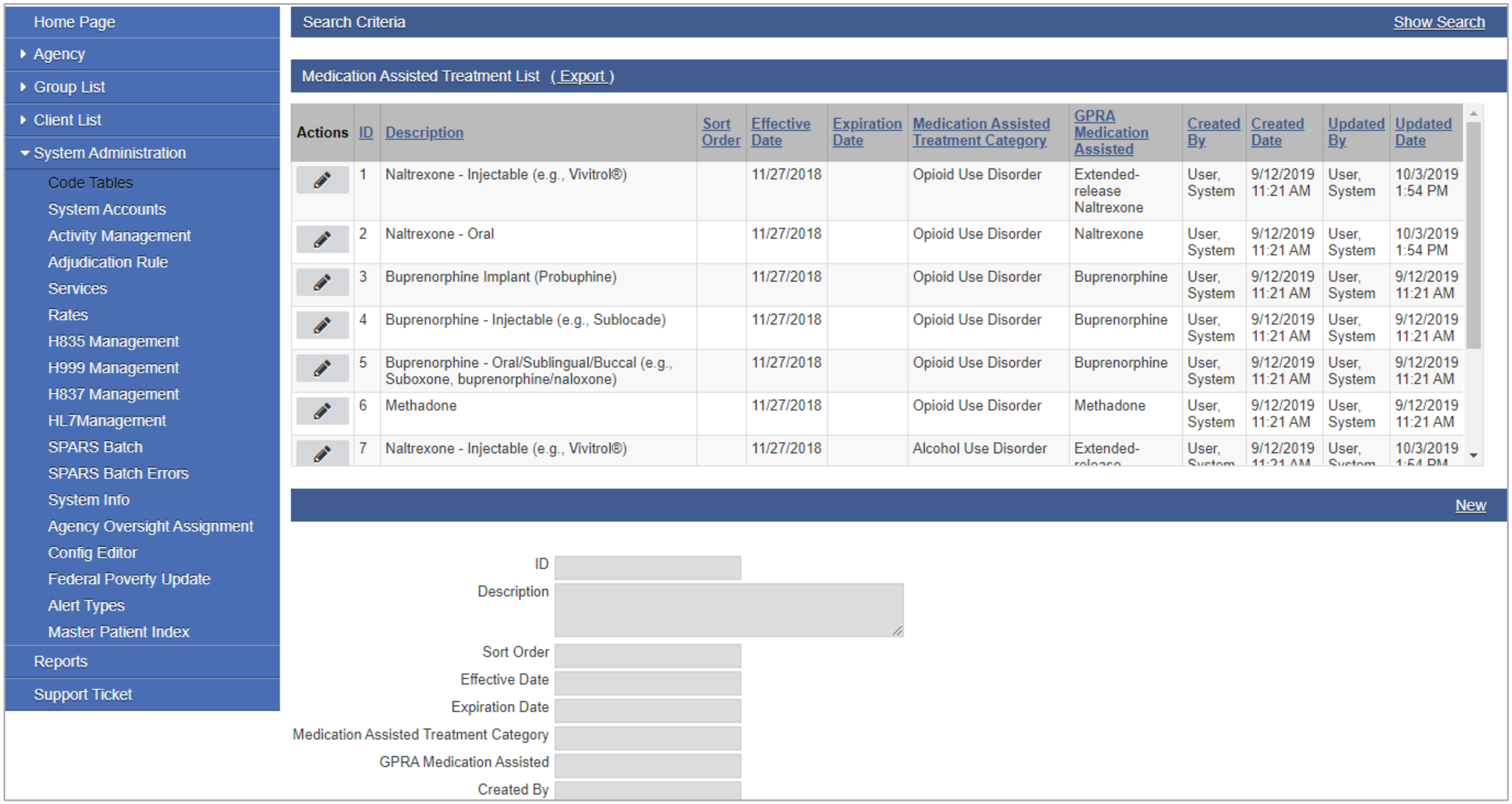


Medications with Medication Assisted Treatment Category Id #2 = **Opioid Use Disorder** will prepopulate question 1.a. Opioid Use Disorder on GPRA Interviews.

Medications with Medication Assisted Treatment Category Id #1 = **Alcohol Use Disorder** will prepopulate question 2.a. Alcohol Use Disorder on GPRA Interviews.

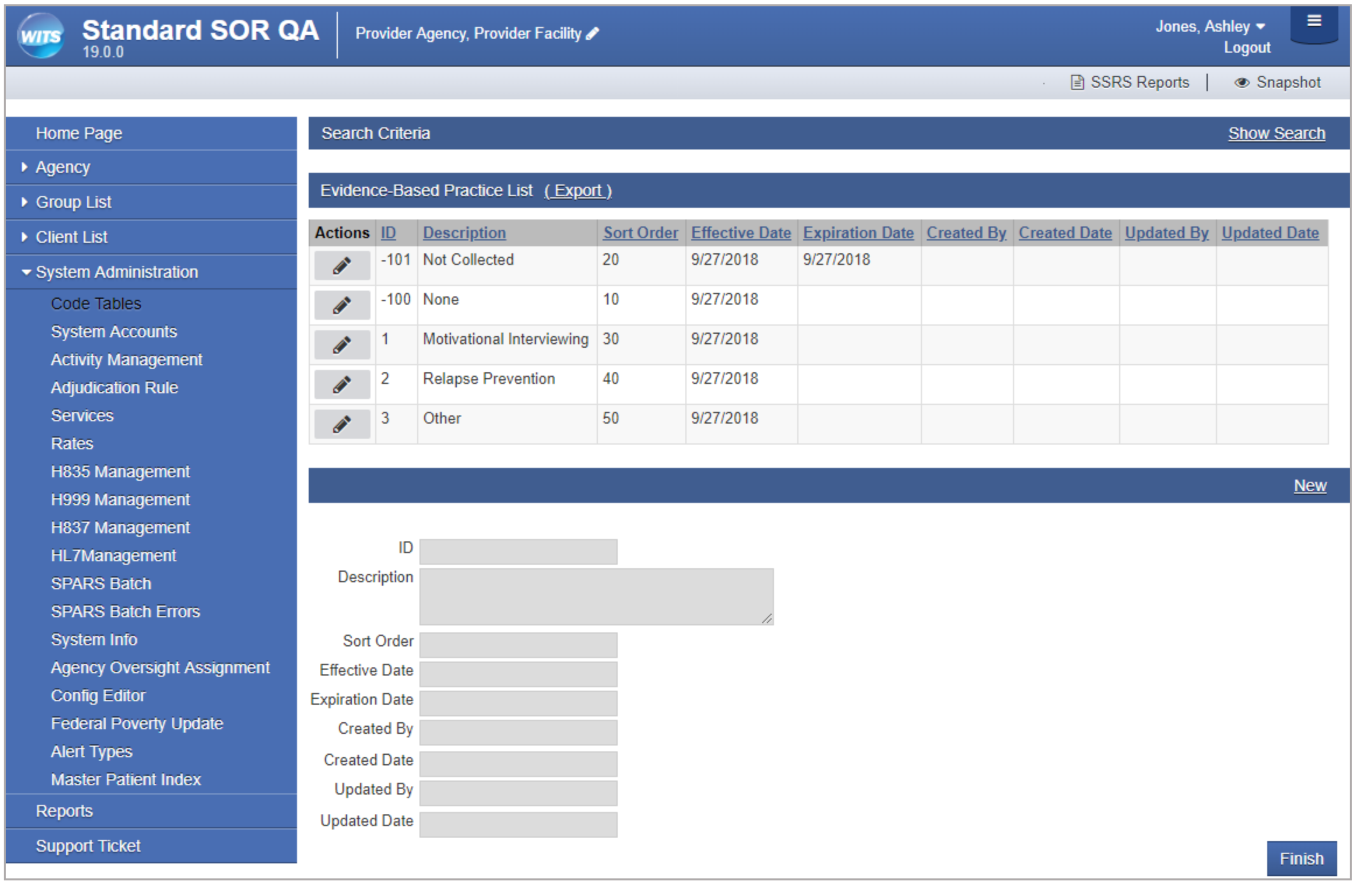
Table 5-3: GPRA Medication Mapping

Medication Assisted Treatment Description	Medication Assisted Treatment Category Id	GPRA Medication
Naltrexone - Injectable (e.g., Vivitrol®)	Opioid Use Disorder (Id #2)	Extended-release Naltrexone
Naltrexone - Oral	Opioid Use Disorder (Id #2)	Naltrexone
Buprenorphine Implant (Probuphine)	Opioid Use Disorder (Id #2)	Buprenorphine
Buprenorphine - Injectable (e.g., Sublocade)	Opioid Use Disorder (Id #2)	Buprenorphine
Buprenorphine - Oral/Sublingual/Buccal (e.g., Suboxone, buprenorphine/naloxone)	Opioid Use Disorder (Id #2)	Buprenorphine
Methadone	Opioid Use Disorder (Id #2)	Methadone
Naltrexone - Injectable (e.g., Vivitrol®)	Alcohol Use Disorder (Id # 1)	Extended-release Naltrexone
Naltrexone - Oral	Alcohol Use Disorder (Id # 1)	Naltrexone
Disulfiram	Alcohol Use Disorder (Id # 1)	Disulfiram
Acamprosate	Alcohol Use Disorder (Id # 1)	Acamprosate



Actions	ID	Description	Sort Order	Effective Date	Expiration Date	Medication Assisted Treatment Category	GPRA Medication Assisted	Created By	Created Date	Updated By	Updated Date
	1	Naltrexone - Injectable (e.g., Vivitrol®)		11/27/2018		Opioid Use Disorder	Extended-release Naltrexone	User, System	9/12/2019 11:21 AM	User, System	10/3/2019 1:54 PM
	2	Naltrexone - Oral		11/27/2018		Opioid Use Disorder	Naltrexone	User, System	9/12/2019 11:21 AM	User, System	10/3/2019 1:54 PM
	3	Buprenorphine Implant (Probuphine)		11/27/2018		Opioid Use Disorder	Buprenorphine	User, System	9/12/2019 11:21 AM	User, System	9/12/2019 11:21 AM
	4	Buprenorphine - Injectable (e.g., Sublocade)		11/27/2018		Opioid Use Disorder	Buprenorphine	User, System	9/12/2019 11:21 AM	User, System	9/12/2019 11:21 AM
	5	Buprenorphine - Oral/Sublingual/Buccal (e.g., Suboxone, buprenorphine/naloxone)		11/27/2018		Opioid Use Disorder	Buprenorphine	User, System	9/12/2019 11:21 AM	User, System	9/12/2019 11:21 AM
	6	Methadone		11/27/2018		Opioid Use Disorder	Methadone	User, System	9/12/2019 11:21 AM	User, System	9/12/2019 11:21 AM
	7	Naltrexone - Injectable (e.g., Vivitrol®)		11/27/2018		Alcohol Use Disorder	Extended-	User,	9/12/2019	User,	10/3/2019

Code Table: Evidence-Based Practice List



System Accounts

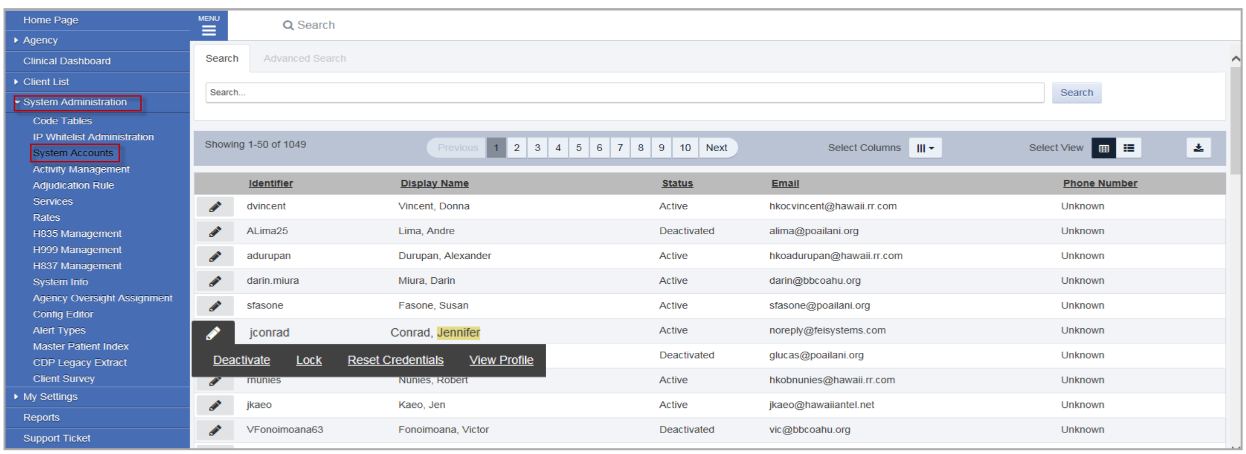
Where:* *System Administration > System Accounts

A **System Account** represents the Staff Member's login to the system. Some user roles can only be assigned to user's System Accounts, such as WITS Administrator, Agency Oversight Assignment, and Cross Agency Waitlist.

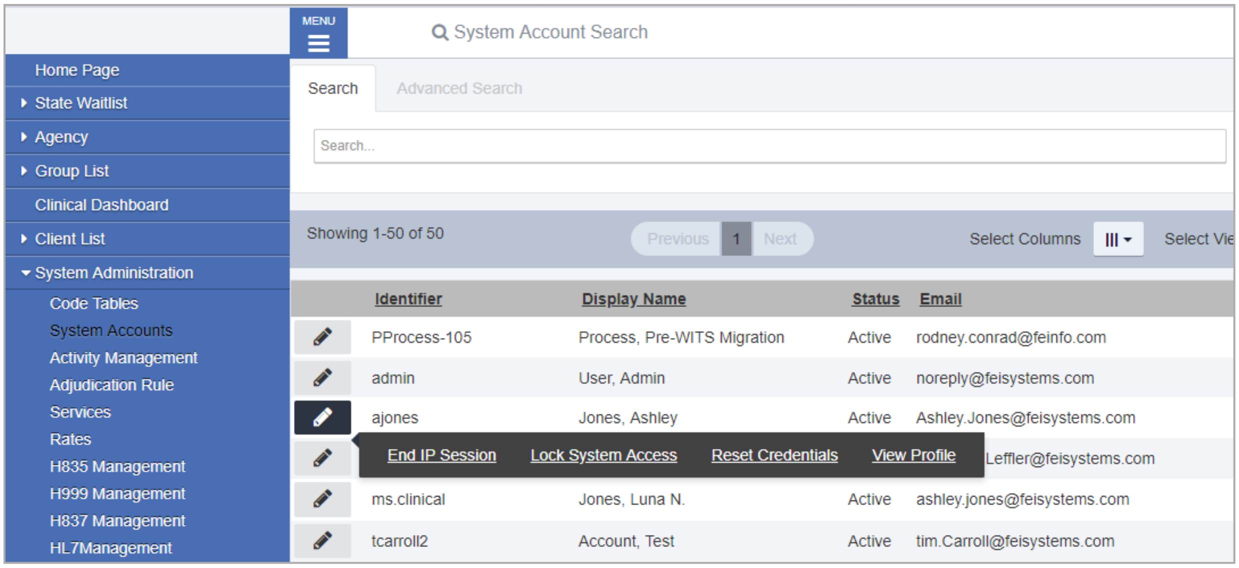
1. On the left menu, click **System Administration**, and then click **System Accounts**.
2. This will display the System Account Search Screen.

This screen allows the user to:

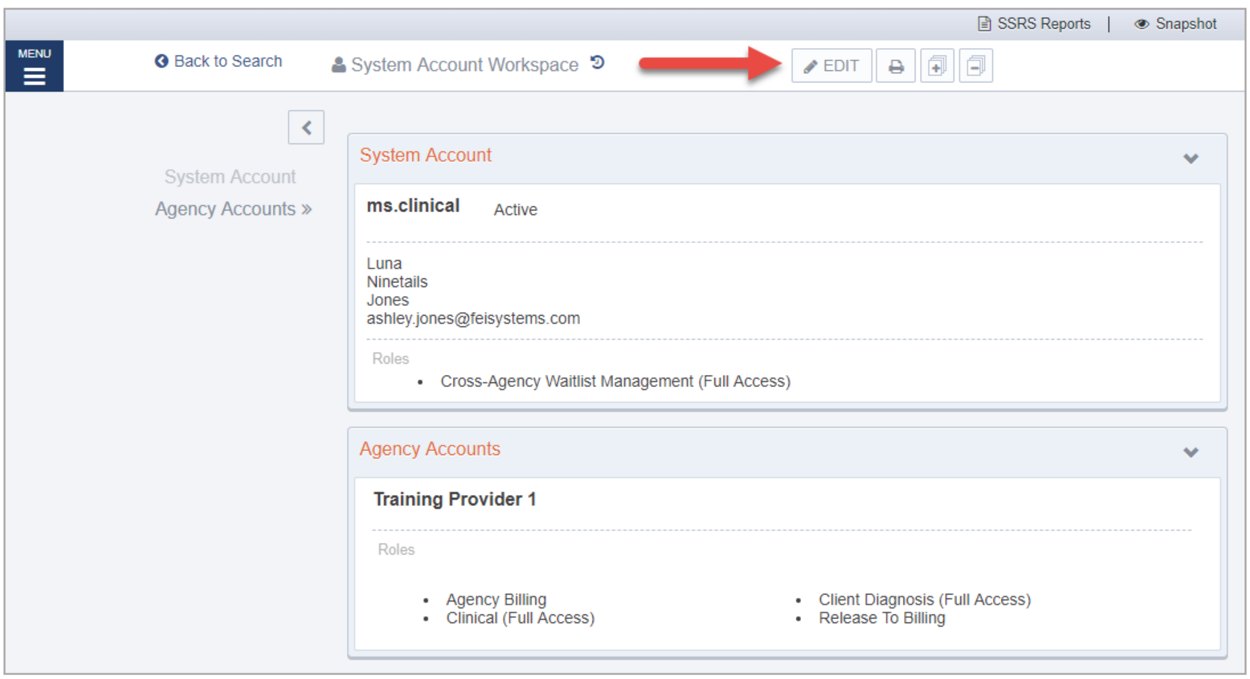
- Search for a staff member across all agencies (if the staff member has a login account)
- Disable a Staff Member's System Account
- Lock a Staff Member's System Account
- Reset a Staff Member's Credentials
- View a Staff Member's Profile
- Download a list of all System Accounts in excel
- View the Staff Member's Identifier which is the WITS username



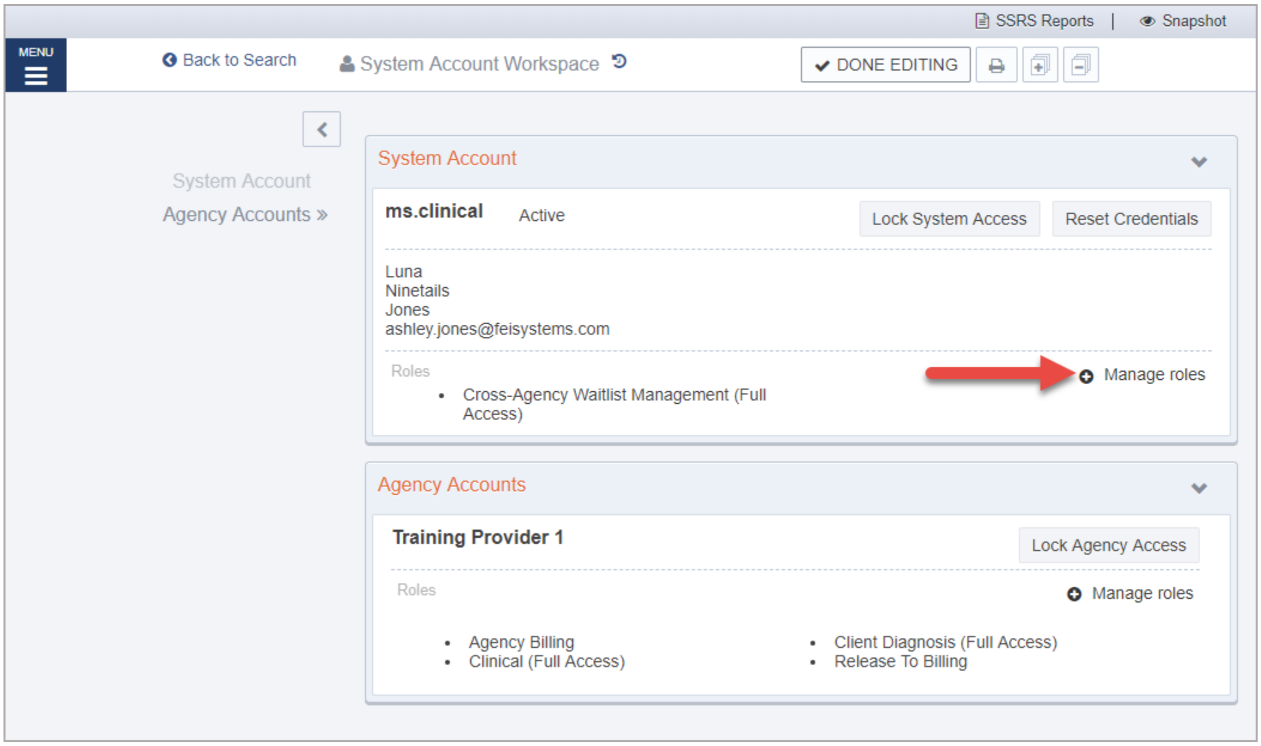
3. After choosing the Staff Member, hover over the **Staff Member's Account** and click **View Profile.**



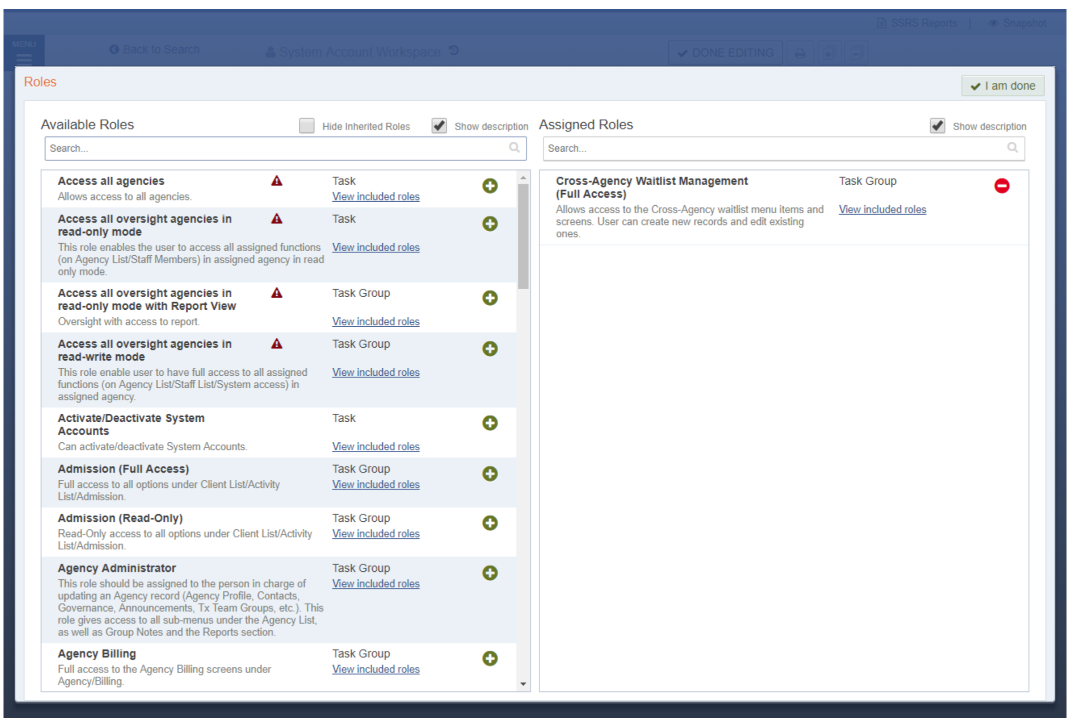
4. Click **Edit**.



5. Click **Manage Roles**.



6. Assign or remove roles as needed.



7. Click **I am done**.

8. On the System Account Workspace screen, click **Done Editing**.

User Controlled Configuration List

Where:* *System Administration* > *User Controlled Configuration List

In WITS, there are two types of help links available for administrators to control:

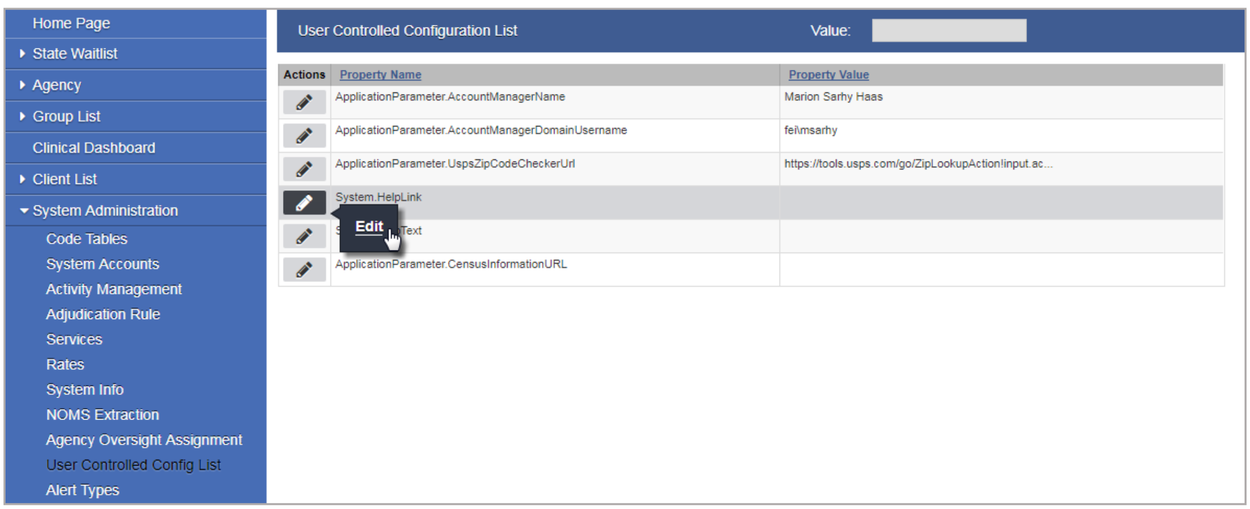
- Instance Wide Help Link
- Context Specific Help Link

Edit Help Links

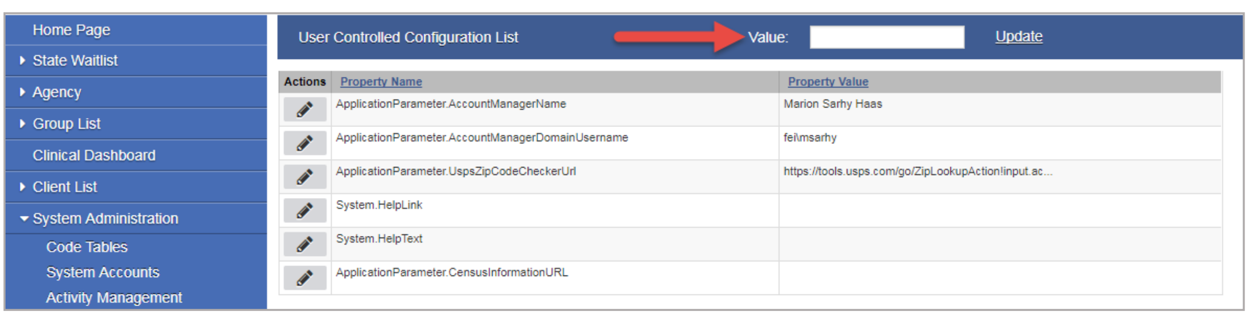
Instance Wide

The Instance Wide help link will be seen by all users in every domain. To edit this link, users will need the **User Controlled Config** role.

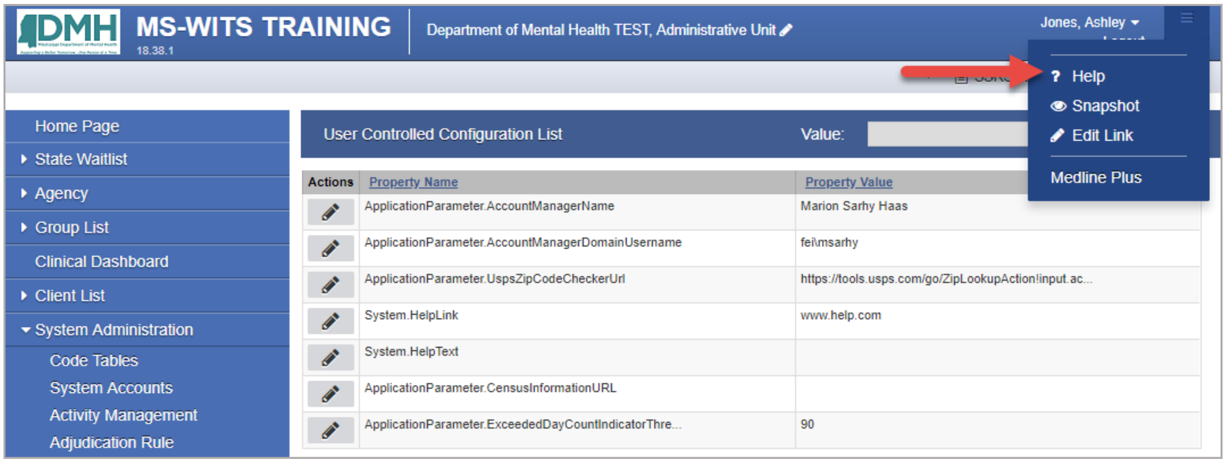
1. On the left menu, click System Administration, and then click User Controlled Config List.
2. Locate the **System.HelpLink** row. Hover over the **Actions** column and click **Edit**.



3. In the **Value** field, type the URL of the desired help site.



4. Click **Update**.
5. After editing the help fields, the **Help** link will become active in the main header bar. Note this link will only be displayed when the URL has been entered into System.HelpLink.

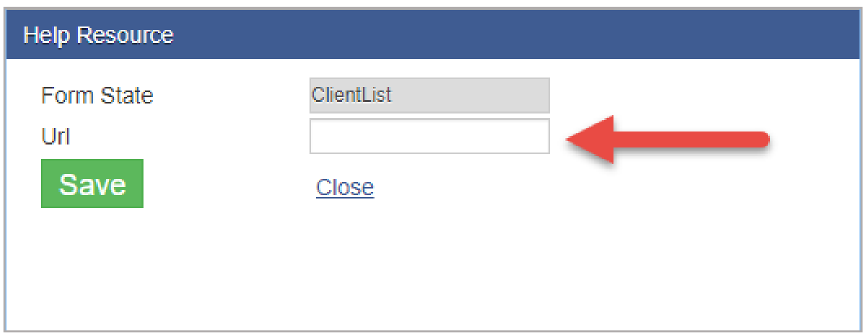

MS-WITS TRAINING
18.38.1
Department of Mental Health TEST, Administrative Unit
Jones, Ashley
Help
Snapshot
Edit Link
Medline Plus
Home Page
State Waitlist
Agency
Group List
Clinical Dashboard
Client List
System Administration
Code Tables
System Accounts
Activity Management
Adjudication Rule
User Controlled Configuration List
Value:
Actions
Property Name
Property Value
ApplicationParameter.AccountManagerName
Marion Sarhy Haas
ApplicationParameter.AccountManagerDomainUsername
fei\msarhy
ApplicationParameter.UspsZipCodeCheckerUrl
https://tools.usps.com/go/ZipLookupAction!input.ac...
System.HelpLink
www.help.com
System.HelpText
ApplicationParameter.CensusInformationURL
ApplicationParameter.ExceededDayCountIndicatorThre...
90

Context Specific

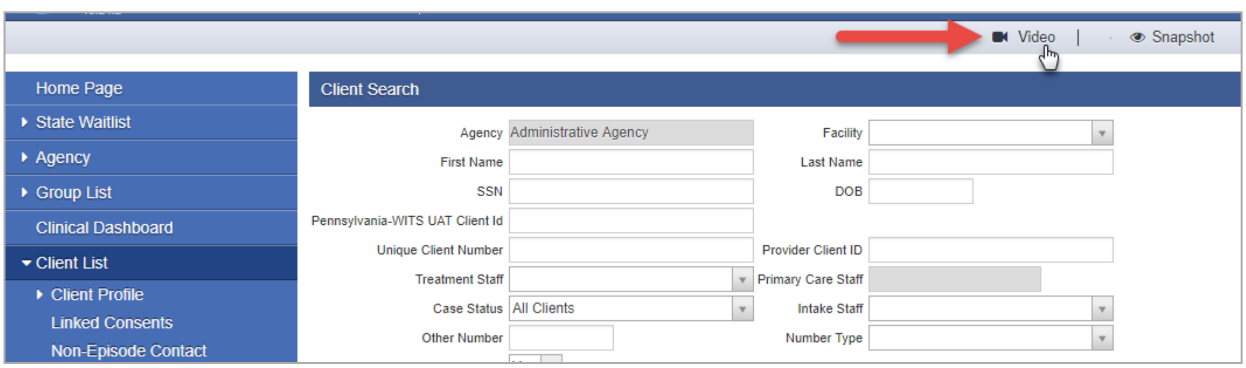
This feature allows administrators to insert a link for Context Specific video/help instructions on each screen.

1. To enable a context specific video/help link, navigate to the desired system screen, and link the **Edit Link** in the main header. Clicking this link will open a separate window.

2. Type in the full URL of your desired help link (i.e., start with **http://** or **https://**), then click **Save**.



3. When this context specific help link is active, users will see a **Video** icon displayed on the header bar. Clicking this will open the help link (in a separate browser tab) for that specific page.



Service Setup and Management

Where: System Administration

On the encounter screen in WITS a user can document the interaction that happened between the client and the clinician. In the billing world, this encounter is called a "delivered" service. In WITS, a list of all the "Services" are created by the WITS Administrator. The WITS Administrator controls what is made available on the Encounter Screen in the dropdown of the Service field and it is managed in the Services Module under System Administration. Code Table Management was discussed in a prior section, at times WITS Administrators can confuse the Service Module, with a normal code table. The Service Module works somewhat like a code table but is much more complex.

From the Encounter Screen, staff select a "Service" by selecting a recognizable procedure, without having to memorize or understand the procedure codes associated with that service in the background. This means that each service, when established, must have a valid procedure code attached to it. A comprehensive list of procedure codes and procedure modifier codes have already been set up within WITS; however, new procedure codes and modifier codes may be added through the code table editor (available to WITS Administrators).

In WITS, there are two basic steps needed to complete service setup:

1. Procedure Codes
2. Services

This section describes how to set up Services in WITS.

> **Tip**: Before entering this data in to WITS, it's strongly recommended to plan which procedure codes and services are needed.

Services refer to time spent with clients. Services allow the clinician to choose a recognizable procedure, without having to memorize or understand the procedure codes associated with that service in the background. This means that each service, when established, must have a valid procedure code. A comprehensive list has already been set up; however, new procedure codes may be added through the code table editor (available to WITS Administrators and to those with Code Table Editor role).

- Each service must have a unique combination of procedure, modifier codes and service description.

Check Available Procedure Codes and Procedure Modifier Codes

Where: System Administration > Code Tables

Before creating services, make sure the correct **procedure codes** and **procedure modifier codes** are available in the code tables. WITS includes a set standard of procedure codes and modifiers, such as HCPCS, CPT codes, so it may not be necessary to create new procedure codes and modifiers.

Important: Procedure Codes cannot be deleted once they have been used. To stop referencing a Procedure Code, set an expiration date. Other code tables related to service setup include "**Procedure Modifier**", and "**Procedure Source**".

To check the available procedure codes, follow the steps below:

1. From the left menu, select **System Administration**, and then click **Code Tables**.
2. On the **Code Tables** screen, click the dropdown menu, select or type the word "**Procedure**" then click **Go**.

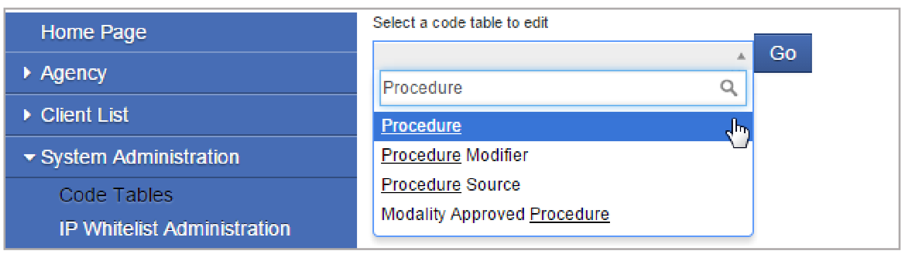


Figure 5-5: Code Tables search screen

3. Once in the **Procedure** code table, review the procedure codes and descriptions available. You can also click the "**Export**" link to download and view all of the procedure codes in an Excel spreadsheet.

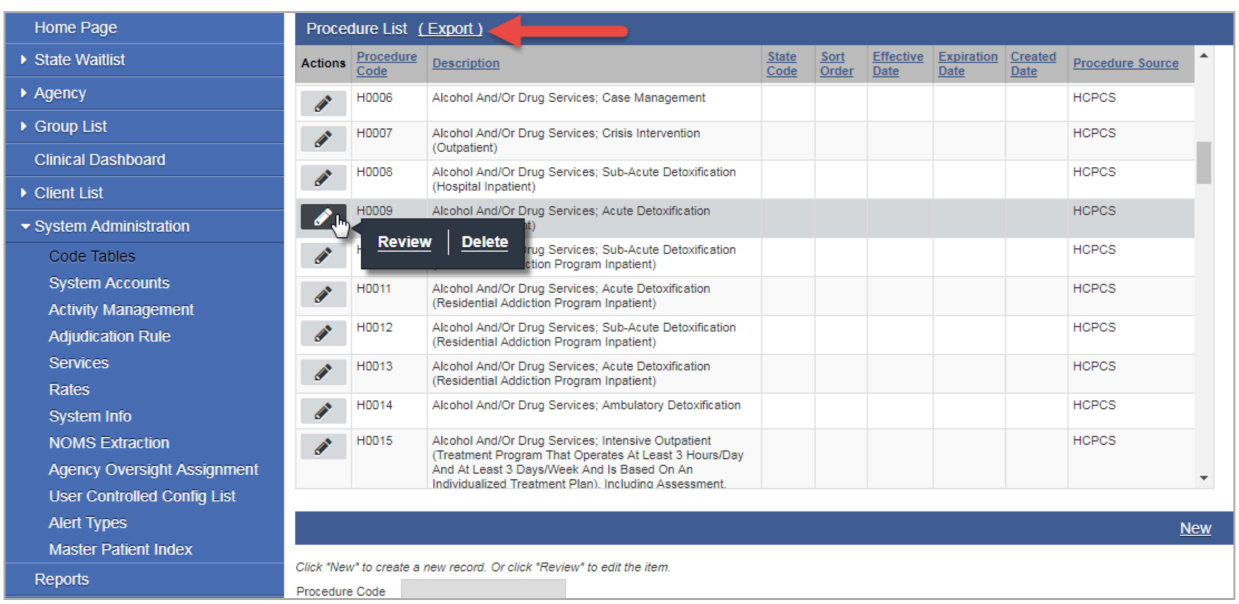


Figure 5-6: Procedure Code Table

4. To add a new procedure code to the list, click the **New** link.

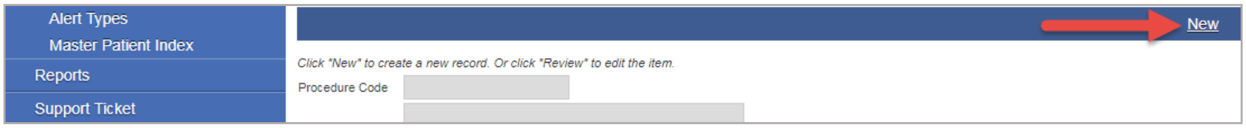


Figure 5-7: Procedure Code Table, New link

5. The bottom section of the screen should now be editable. Enter the required information as shown in the table below.

Table 5-4: Procedure Code fields

Field	Description
Procedure Code	Any HCPCS, CPT, or State based code that should be used to identify the services.
Description	Type a description of the Procedure code.
State Code	(Optional)
Sort Oder	(Optional) This field will control how the codes are ordered in a dropdown list on screen.
Effective Date	(Optional)
Expiration Date	(Optional)
Procedure Source	Select an option from the drop-down list. If the desired source is not listed, it can be added in the "Procedure Source" code table.

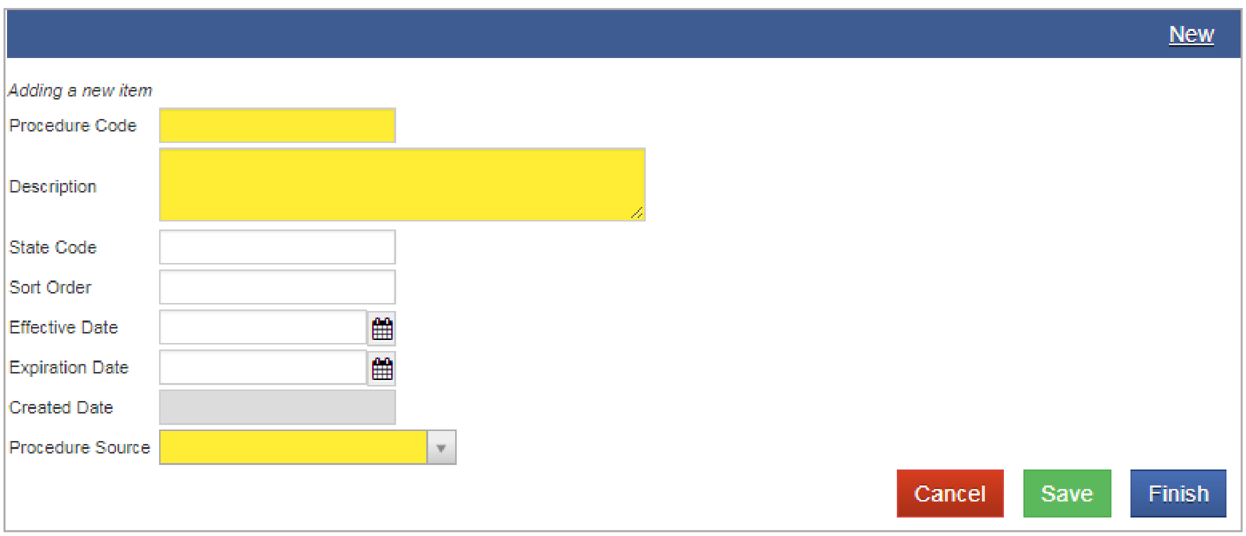


Figure 5-8: Add New Procedure Code

6. Click **Save** or **Finish** to complete your entry.

Create Service Profile

***Where:* System Administration > Services**

Prerequisites:

- Procedure Codes
- Procedure Modifiers

Services can be created if the correct procedure codes and procedure modifier codes are entered in the Procedure code table and Procedure Modifier code tables, respectively.

1. From the left menu, click **System Administration**, and then click **Services**.
2. Click **Go** to view all the services currently set up.
3. To add a new service, click on the **Add New Service** link. As a timesaving feature, you may also clone any current service using the **Clone** link in the Actions column.

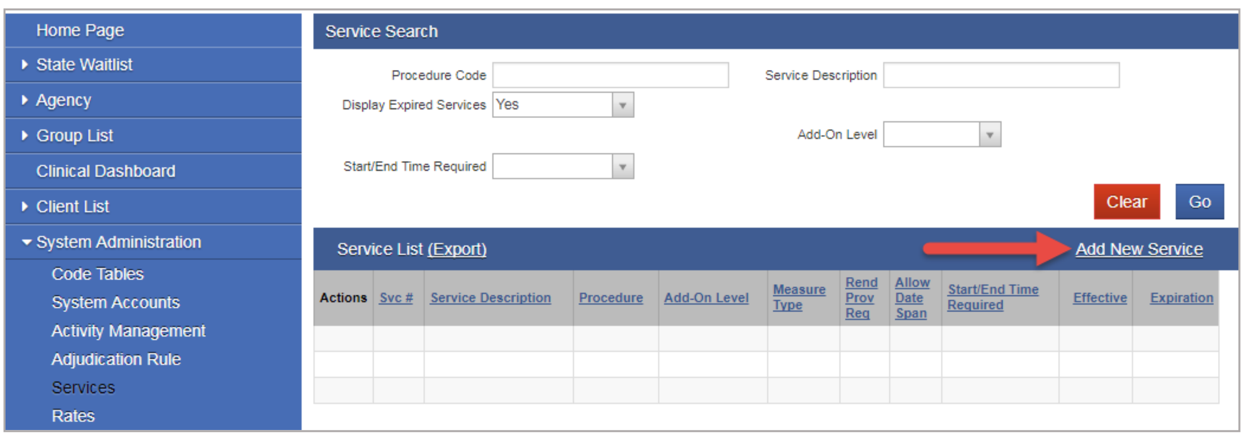


Figure 5-9: Services Screen

4. When the **Service Profile** screen opens, enter the service information used for encounters/billing. The following list describes each field on the service profile.

> **Tip**: Measure Type is one of the most important things to consider when setting up a new service. Ask yourself, if I were to pay someone for this service, how would I pay them on a unit basis or by the duration of the amount of time they have spent with the client?

Table 5-5: Service Profile fields

Field	Description
Service #	System generated number that uniquely identifies each service (helpful for reporting). This field is read-only and the number will be generated once the new service is saved.
Procedure Code	In the drop-down field, select from options previously entered in the "Procedure" code table.

Field	Description
Description	Type the name of service; this should be descriptive so that clinicians know exactly what the service is when they select services in other areas of the system.
Modifier(s) 1, 2, 3, 4	If there are multiple services that use the same procedure code, select one or more Modifiers for this service. If an option is not available in the modifier drop-down field, new modifiers can be added the "Procedure Modifier" code table.
Measure Type	Select Unit or Duration. If "Duration" is selected, this will enforce the duration fields on the Encounter screen.
Rendering Provider Required	Select Yes or No. If "Yes" is selected, the name of the rendering staff member will be a required field on an Encounter for this service.
Date Span Allowed	Select Yes or No. If "Yes" is selected, an Encounter with this service will be able to start and end on different dates.
Effective Date	Select the earliest date providers could start using this service.
Expiration Date	When an expiration date is set on a service profile, the service will not be available for use throughout the system past the expiration date.
Add-On Level	
Start/End Time Required	Select Yes or No. If "Yes" is selected, the Start Time and End Time fields will be required to save an Encounter with this service.
Created Date	Read-only field.
GPRA Service	Select which GPRA service this service corresponds to. This field is optional. Map the service to GPRA service only if it applies. Any service mapped to a GPRA Service will allow for pre-populating the services received on the GPRA discharge interview.
Selected Domains	Select one or more domains for this service.

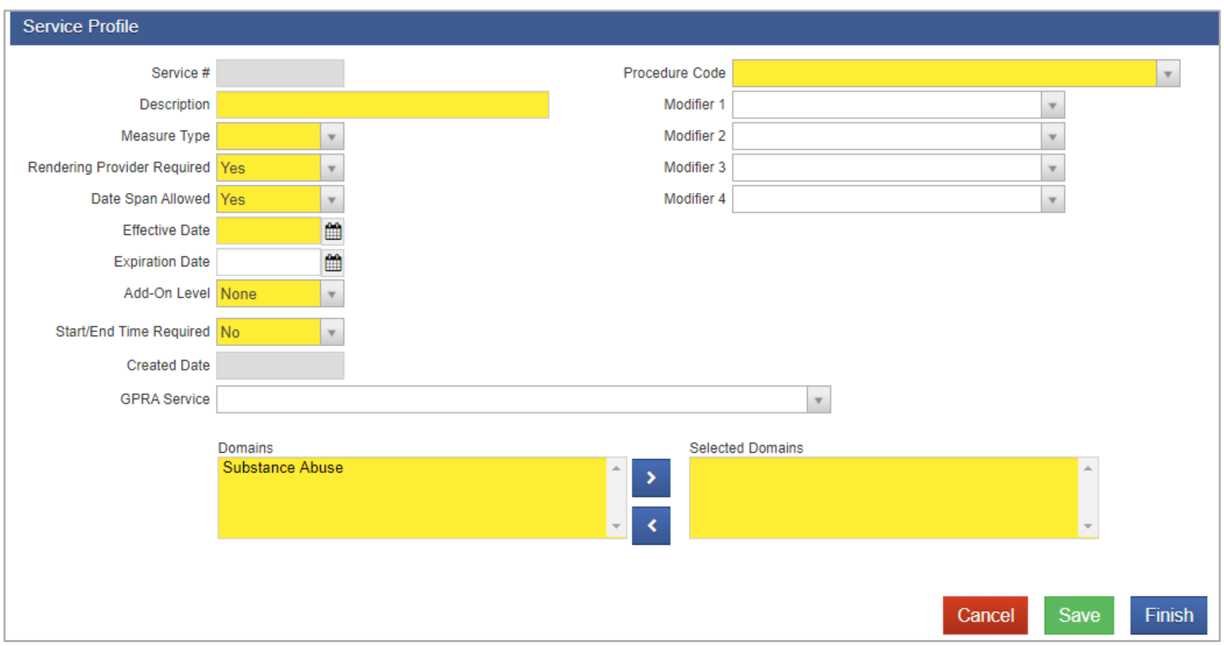


Figure 5-10: Service Profile screen

5. Click **Save** and then click **Finish**. Add additional services as needed.

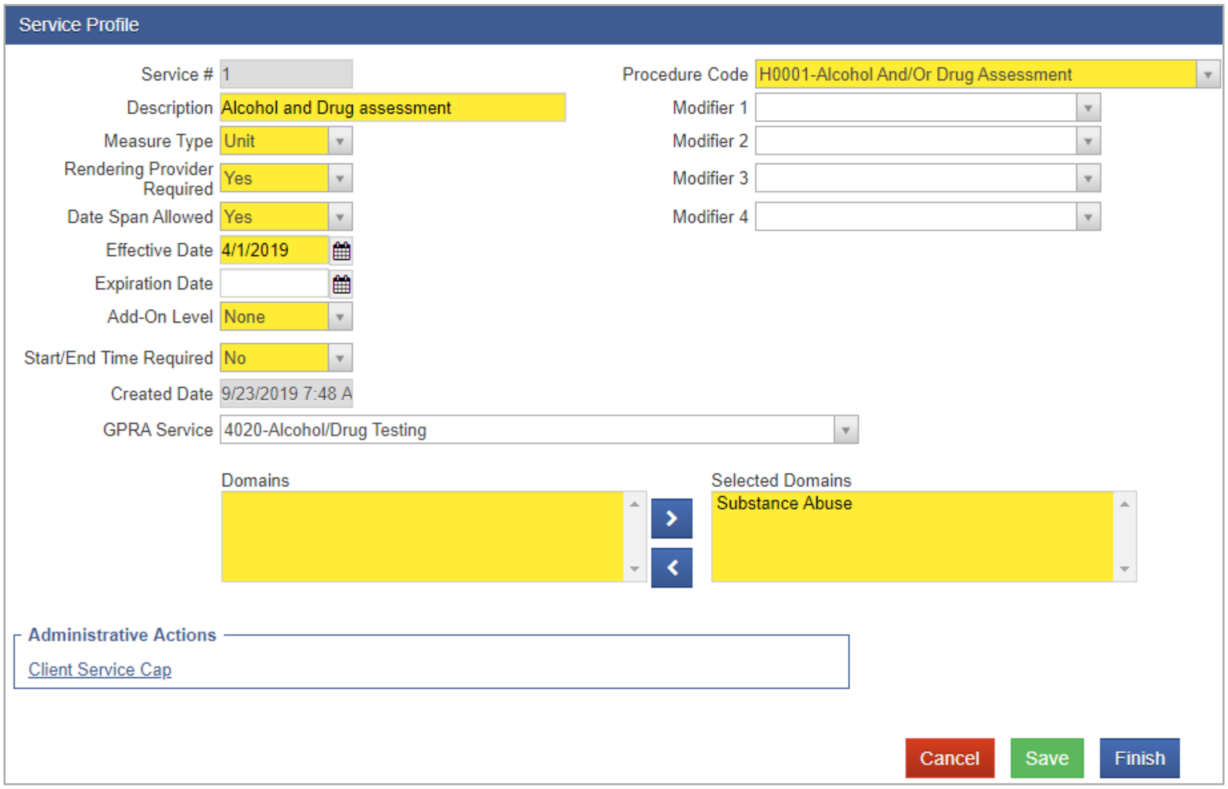


Figure 5-11: Completed Service Profile

6. As a timesaving feature, you may also clone any current service using the **Clone** link in the **Actions** column.

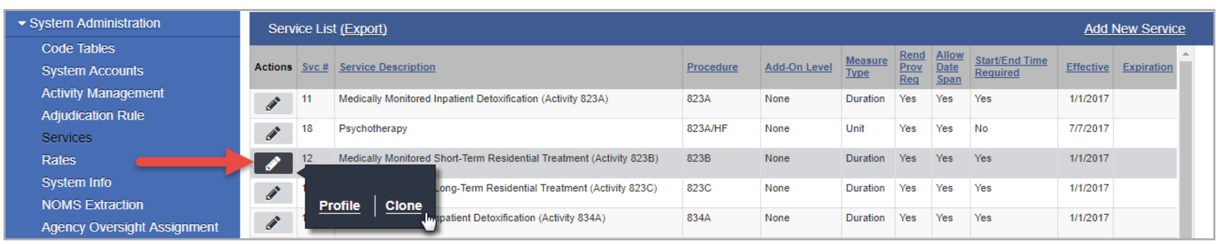


Figure 5-12: Clone Service

Master Patient Index

Where:* System Administration > *Master Patient Index

The **Master Patient Index** is a tool for WITS Administrators to quickly search for clients across agencies.

1. On the left menu, click **System Administration**, and then click **Master Patient Index**.
2. Enter client information within the **Master Patient Index Search** fields, then click **Go**.

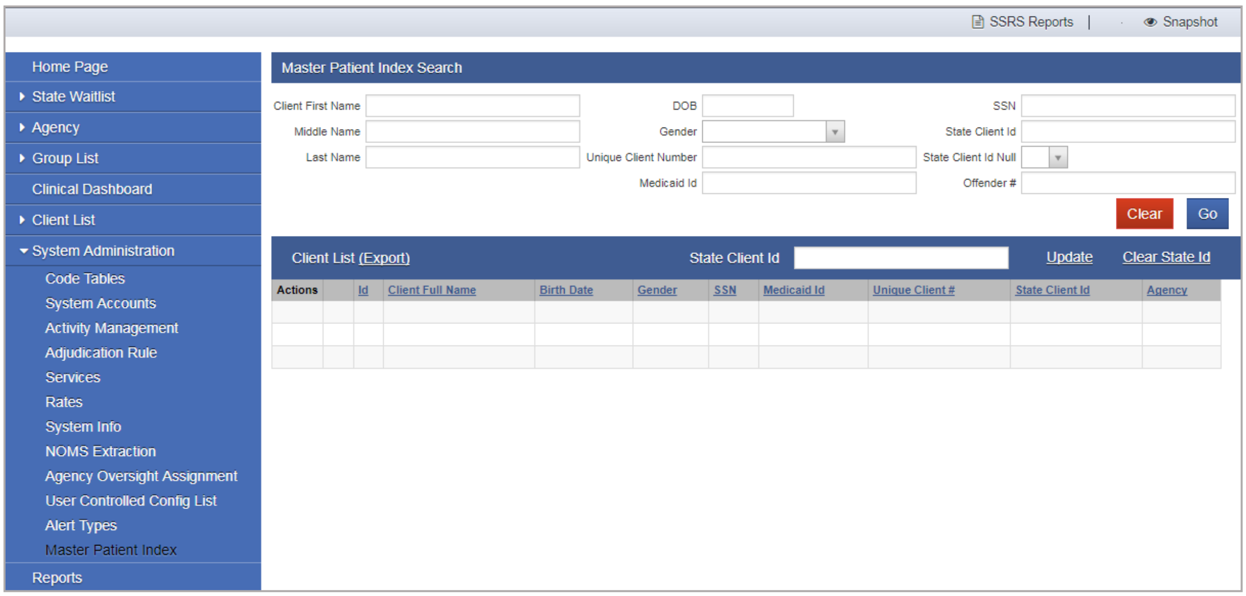


Figure 5-13: Master Patient Index screen

3. The Actions allow you to view the client's **Master Patient Index (MPI)**, **Preview Client Summary**, or **Edit Client Profile**. Selecting the **Edit Client Profile** action will change your current location within WITS and will open the client profile within that specific agency.

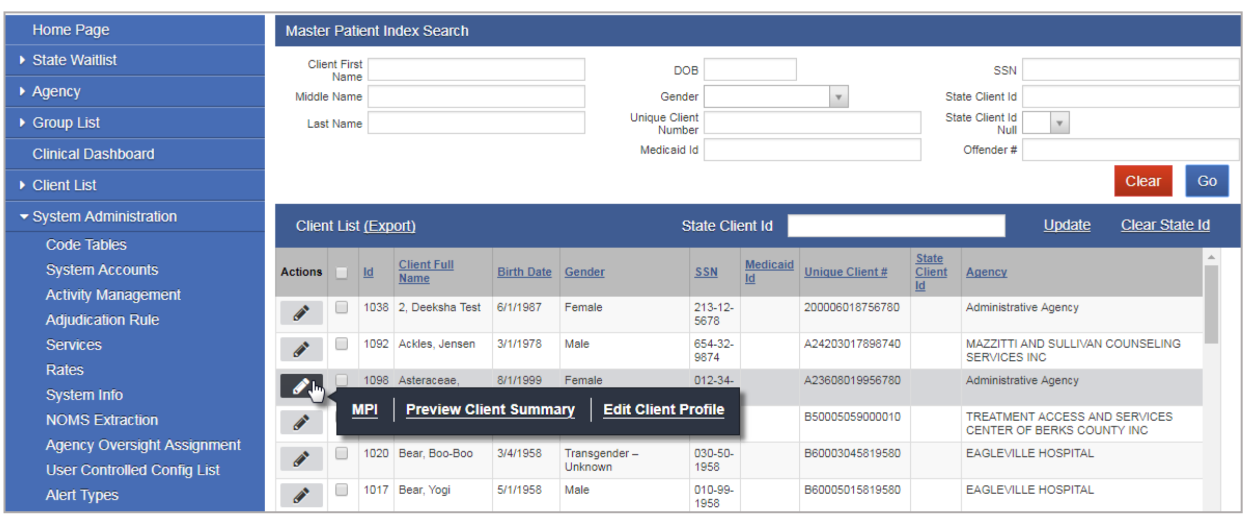


Figure 5-14: Master Patient Index screen, Action links

SPARS Upload

***Where:* System Administration > SPARS Batch**

SAMHSA's Performance Accountability and Reporting System (SPARS)

SPARS (SAMHSA's Performance Accountability and Reporting System) is an online system designed to support grantees in reporting data to SAMHSA. WITS provides grantees with an automated process to validate and upload data directly to SPARS. During this process, GPRA records are grouped into batches and submitted as XML files. Records from each batch are validated and results of the validation process are displayed in WITS (shown as the Batch Status). If errors are found, detailed messages are provided to identify the records involved, types of errors found, and includes a link to fix the associated record in WITS. This information is accessible in WITS on two screens: **SPARS Batch** and **SPARS Batch Errors**. In Production sites, this automated process is scheduled to run nightly, although administrators can manually start a batch file to upload.

Required Role(s):

- SPARS Extraction (Full Access)

Note: SPARS Extraction (Full Access) is included in the WITS Administrator role.

SPARS Batch

The **SPARS Batch** section in WITS allows users to create new SPARS batches, view and search for existing batches, and export the list of batches displayed on screen. This list shows the upload status, type of batch, as well as the date and time the batch was uploaded and processes by SPARS.

1. To view batches, on the left menu, click **System Administration**, then click **SPARS Batch**.
2. On the SPARS Batch screen, click **Go** to view previously created batches.
3. To manually create a new batch, click **Start Services SPARS Batch**.
4. If records are available to upload, a new Batch # will be displayed on screen.

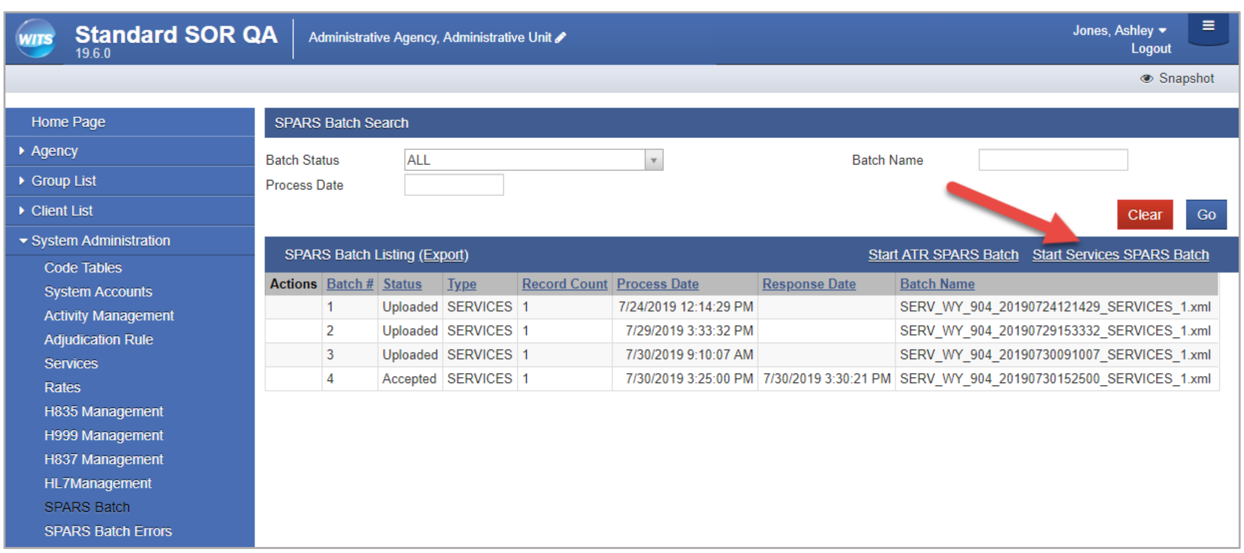


Figure 5-15: SPARS Batch Search/List screen

See the table below for a description of each batch status.

Table 5-6: Batch Status Definitions

Status	Description
Started	The upload process has begun.
Uploaded	The batch has been uploaded and is being verified.
Failed	The batch has not been updated to SPARS because of some invalid data.
Accepted	SPARS verified the batch and data was processed successfully.
Rejected	SPARS verified the batch and the data has not been processed successfully.

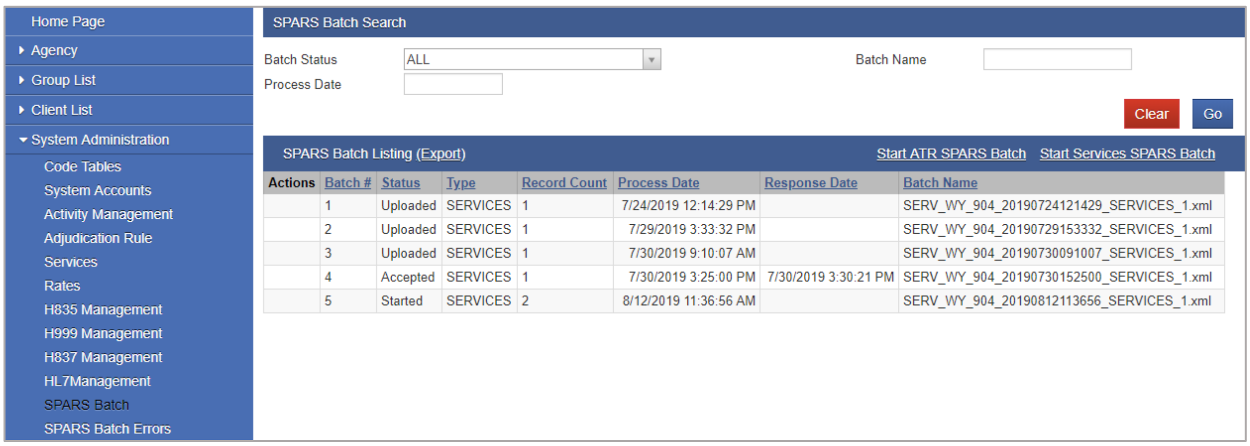
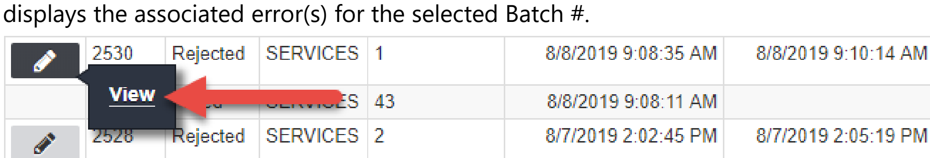


Figure 5-16: SPARS Batch Search/List screen with new record started

See the table below for a description of columns displayed on screen.

Table 5-7: SPARS Batch Listing columns

Column Name	Description
Actions	For batches with a "Rejected" status, the Actions column will display a pencil icon with a **View** link. Clicking this link will redirect users to the **SPARS Batch Errors** screen, which displays the associated error(s) for the selected Batch #. 
Batch #	Record number for the batch.
Status	Status of the batch.
Type	Type of batch.
Record Count	Number of records included in specified batch.
Process Date	Date and time the batch was processed in WITS.
Response Date	Date and time a response was received from SPARS.
Batch Name	File name for the batch.

SPARS Batch Errors

Where:* System Administration *> SPARS Batch Errors

The **SPARS Batch Errors** screen displays a list of rejected batches because of an error. The list shows the error message and provides a **Fix** link (in the Actions column), which will redirect users to the Client List screen with the client's ID populated in the Unique Client Number search field. Users can then correct the GPRA interview that is in error, and the updated interview will be uploaded with the next batch (at night).

1. To view batch errors, on the left menu, click **System Administration**, then click **SPARS Batch Errors**.
2. On the SPARS Batch Errors screen, click **Go** to view a list of errors (or use the search fields then click Go).
3. To help review the error information, click **Export** to download the list as an Excel file.

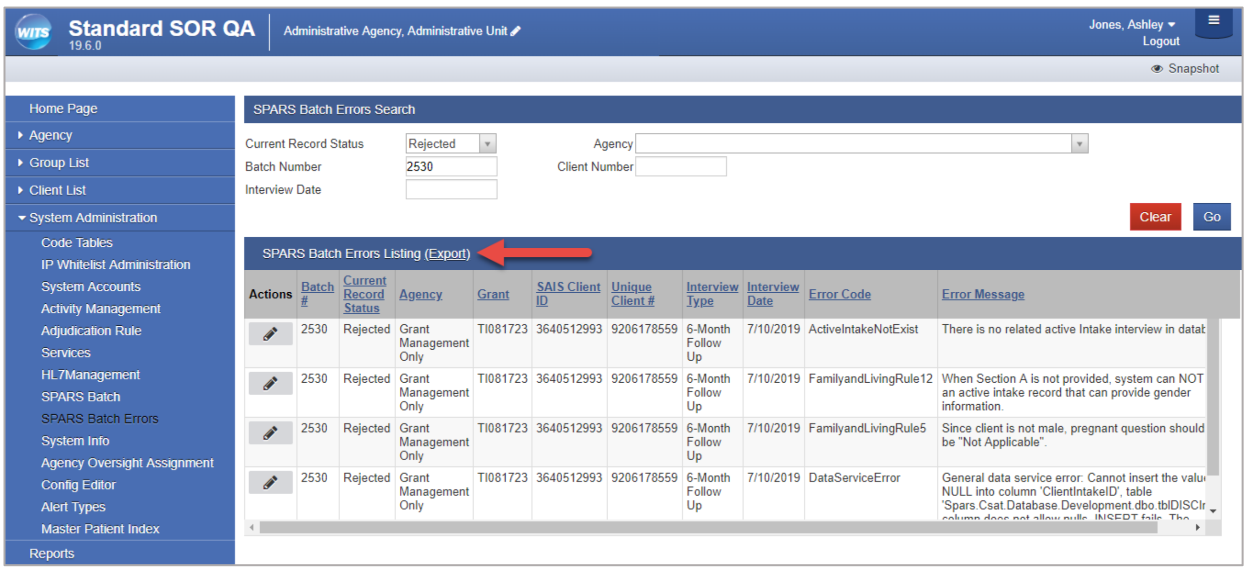


Figure 5-17: SPARS Batch Errors, Export list

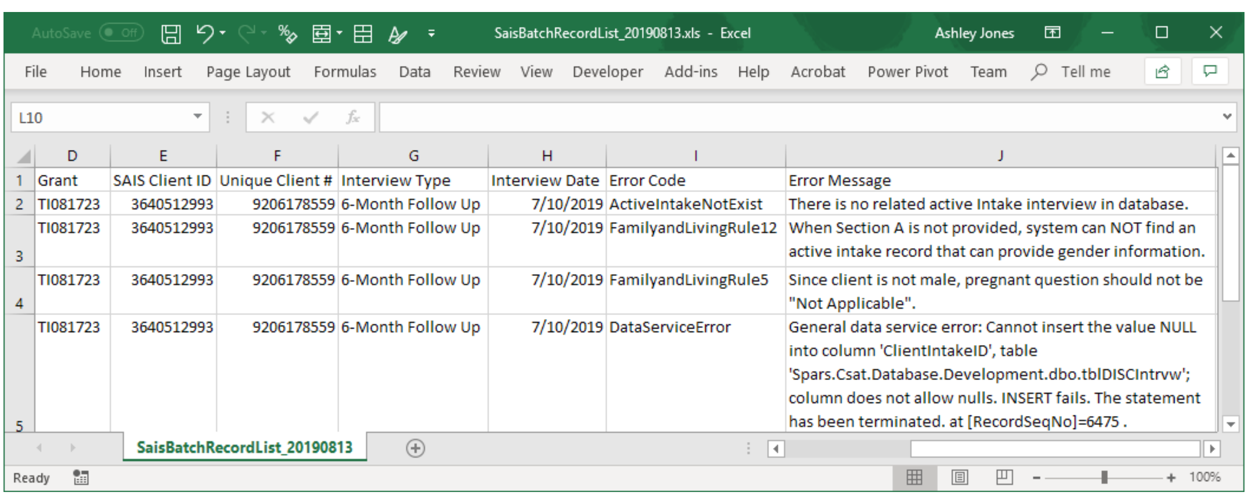


Figure 5-18: Exported Data from SPARS Batch Errors screen

4. On the SPARS Batch Errors list, locate an error to correct, point to the pencil icon in the Actions column, then click **Fix**.

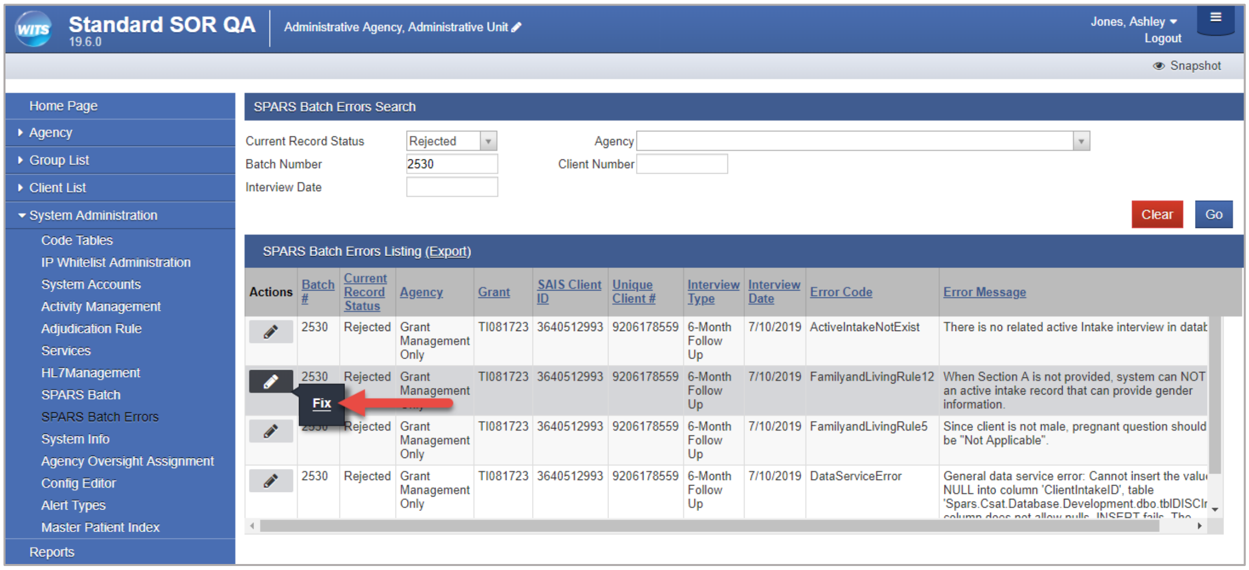


Figure 5-19: SPARS Batch Errors List, Fix link

5. The system will redirect users to the **Client List** screen with the client's UCN populated in the **Unique Client Number** search field. Click **Go**.

Note: Your context agency needs to be the agency where the client record is located.

6. In the Client List, point to the pencil icon in the Actions column and click **Activity List**.
7. From the Client Activity List, locate the interview to fix and update the record based on the identified error message.
8. Once the record has been updated, return to the SPARS Batch Errors screen to continue fixing additional error messages as needed.

Part 6: Reports

WITS Reports Module

Where: Reports

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

Required Role(s):

- Reports Access

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

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

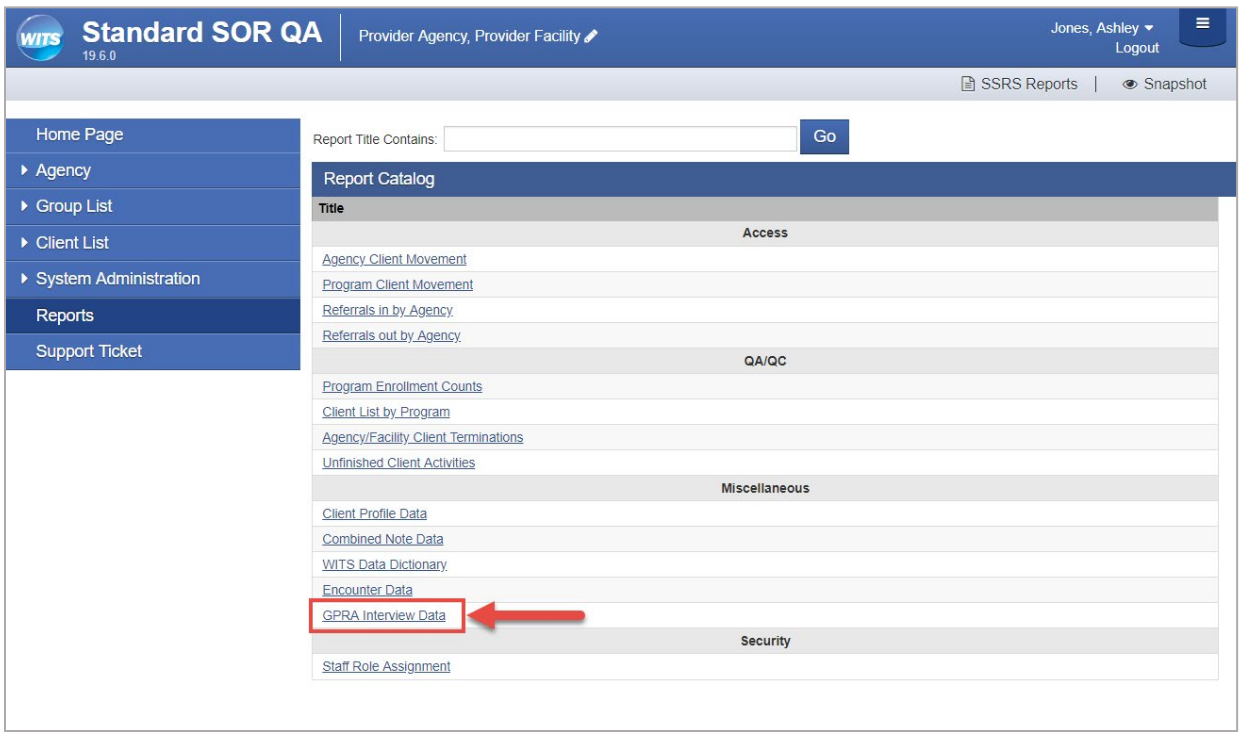
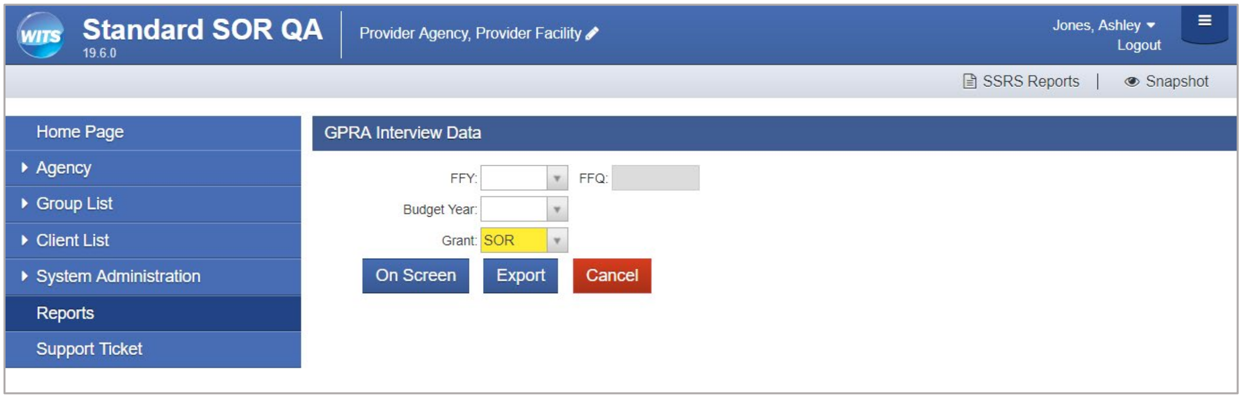


Figure 6-1: Report Catalog screen

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



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

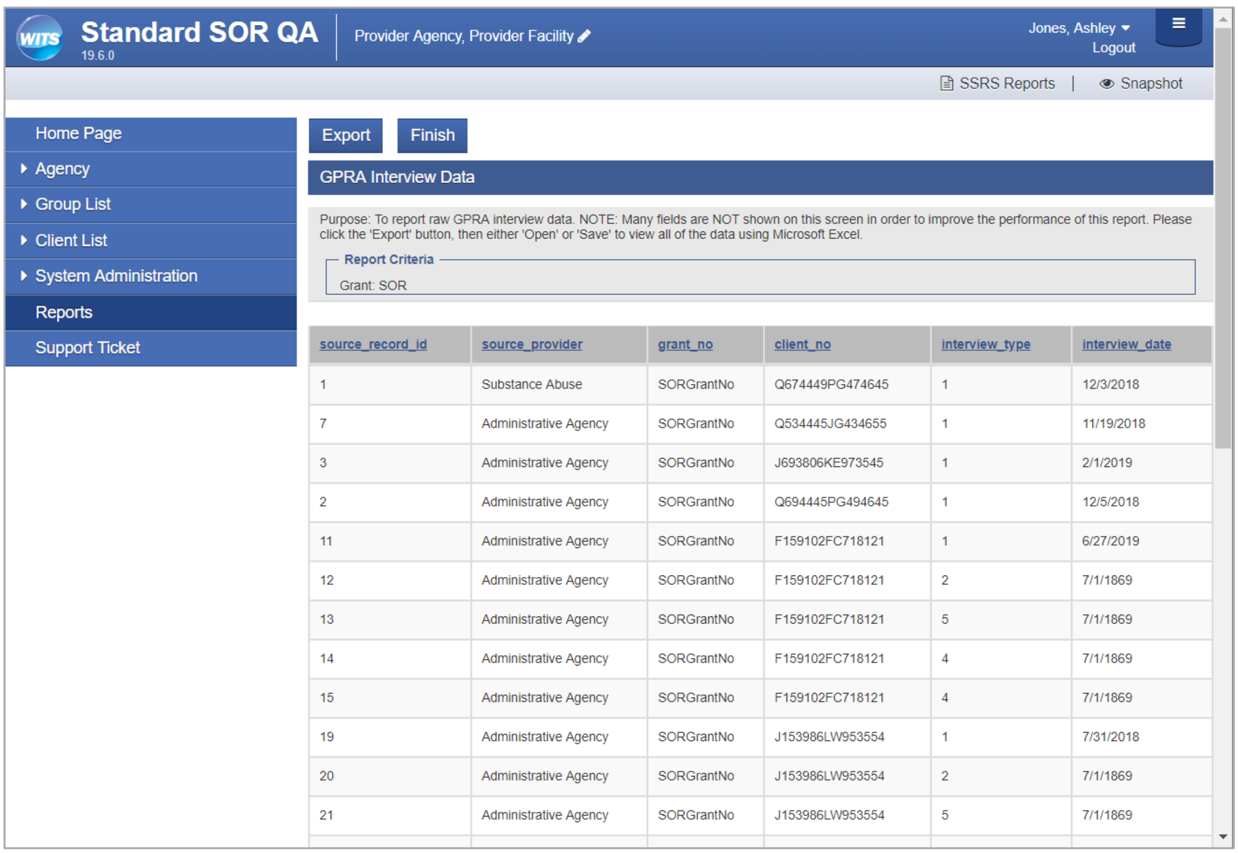
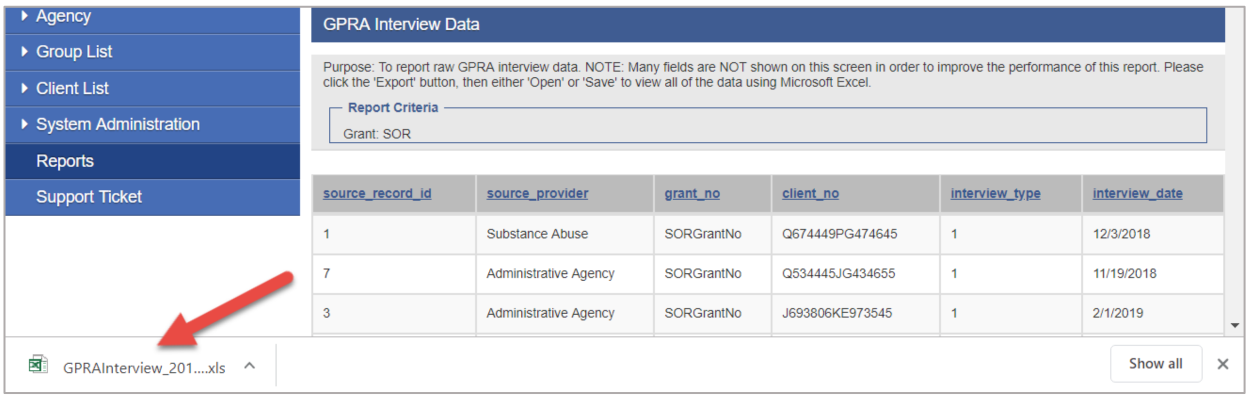
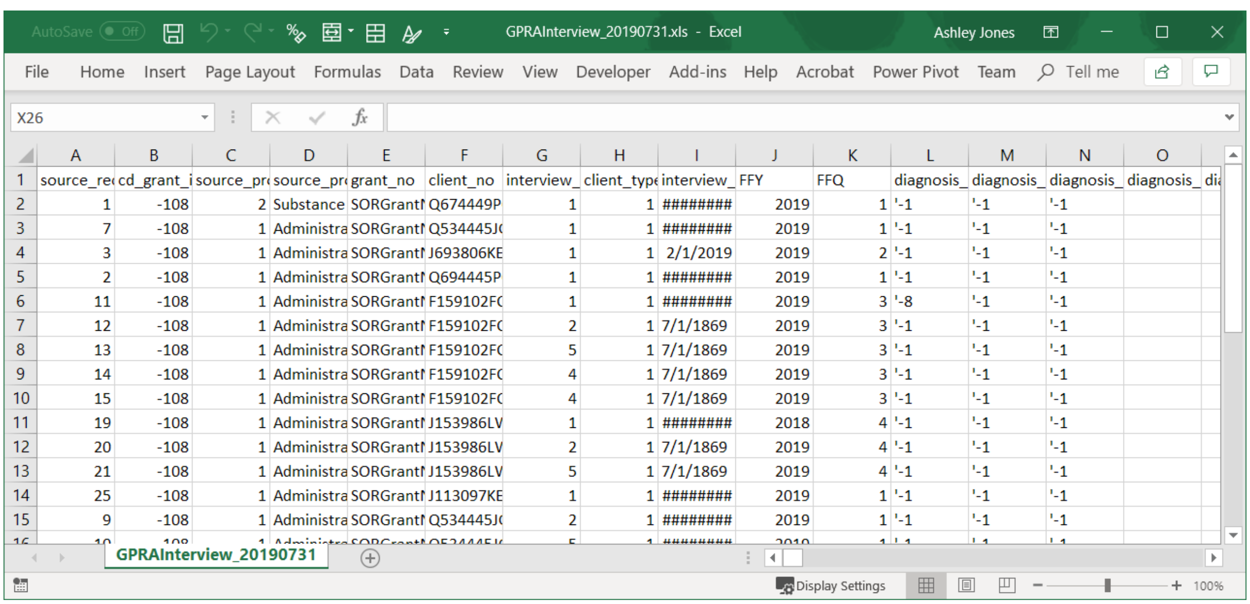


Figure 6-2: Viewing the Report On Screen

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





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

SSRS Reports

Where:* WITS > *SSRS Reports

Required Role(s):

- SSRS Reports Access (any SSRS role)

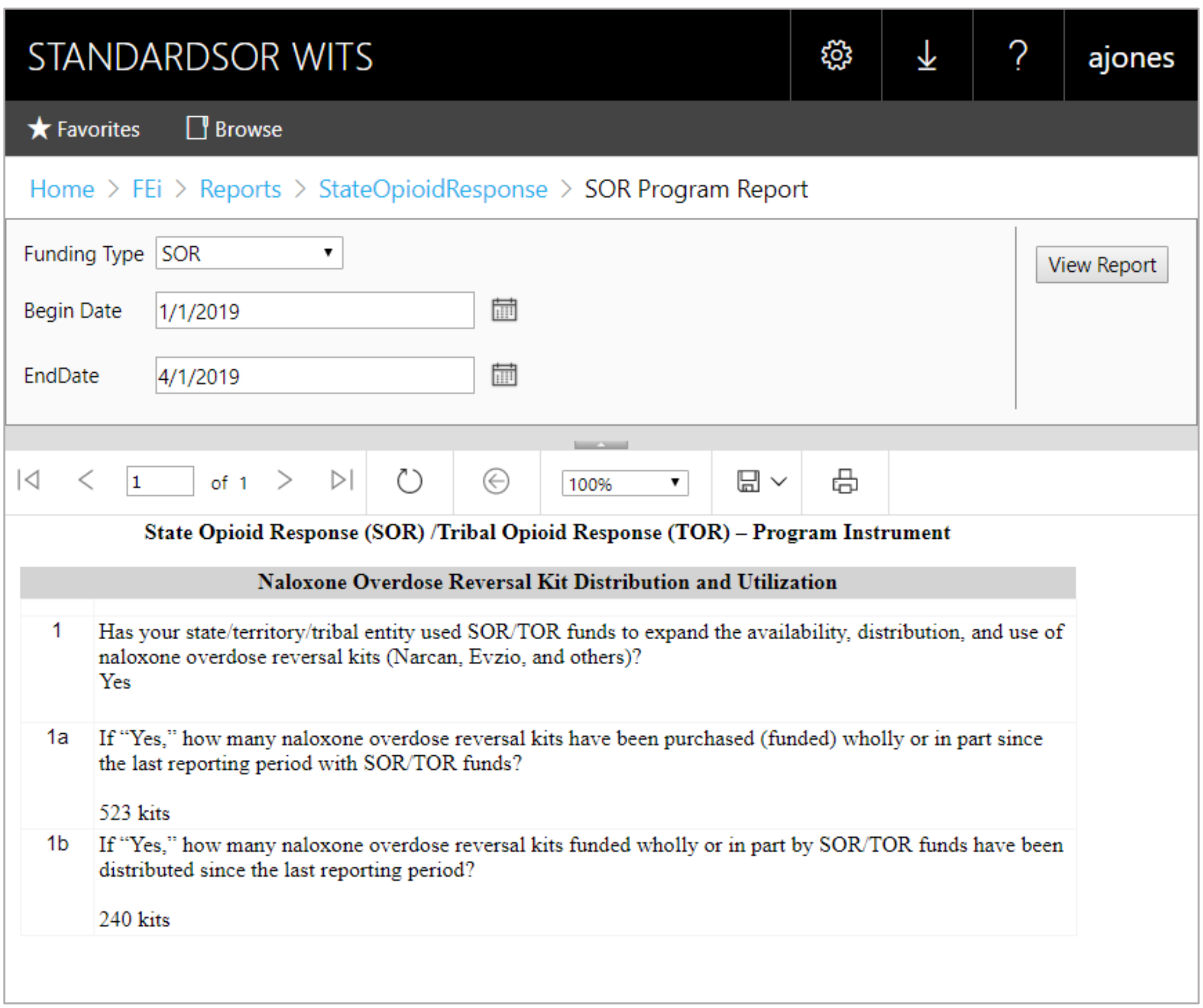
SOR Program Report

State Opioid Response (SOR)/Tribal Opioid Response (TOR) – Program Instrument

The SOR Program Report provides the total number of Naloxone Overdose Reversal Kits purchased and the total number of Naloxone Overdose Reversal Kits distributed within a given date range (of three (3) months). The report includes parameters for users to select the Funding Type, and the beginning and end dates for the reporting period.

Note: This report will be saved on the web portal in the following location:

FEI > Reports > StateOpioidResponse

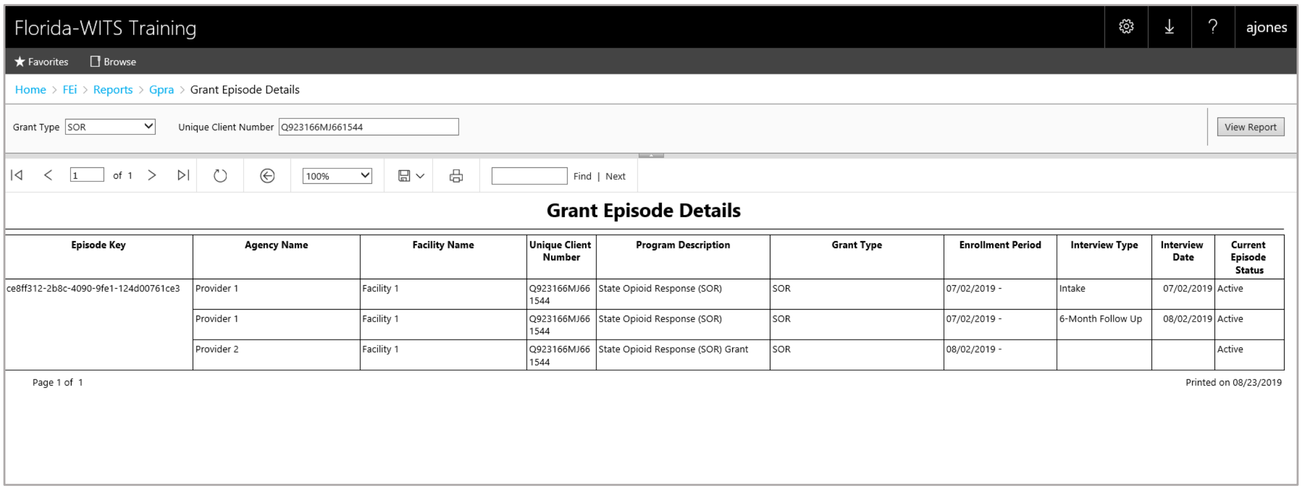


Grant Episode Details Report

The Grant Episode Details report includes parameters for users to select the Grant Type and a field to enter a Unique Client Number.

Note: This report will be saved on the web portal in the following location:

FEI > Reports > Gpra



Episode Key	Agency Name	Facility Name	Unique Client Number	Program Description	Grant Type	Enrollment Period	Interview Type	Interview Date	Current Episode Status
ce8ff312-2b8c-4090-9fe1-124d00761ce3	Provider 1	Facility 1	Q923166MJ661544	State Opioid Response (SOR)	SOR	07/02/2019 -	Intake	07/02/2019	Active
	Provider 1	Facility 1	Q923166MJ661544	State Opioid Response (SOR)	SOR	07/02/2019 -	6-Month Follow Up	08/02/2019	Active
	Provider 2	Facility 1	Q923166MJ661544	State Opioid Response (SOR) Grant	SOR	08/02/2019 -			Active