



FEI Systems



# 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)."<sup>1</sup>

### 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.

**Note:** 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.**

<sup>1</sup> 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

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**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.

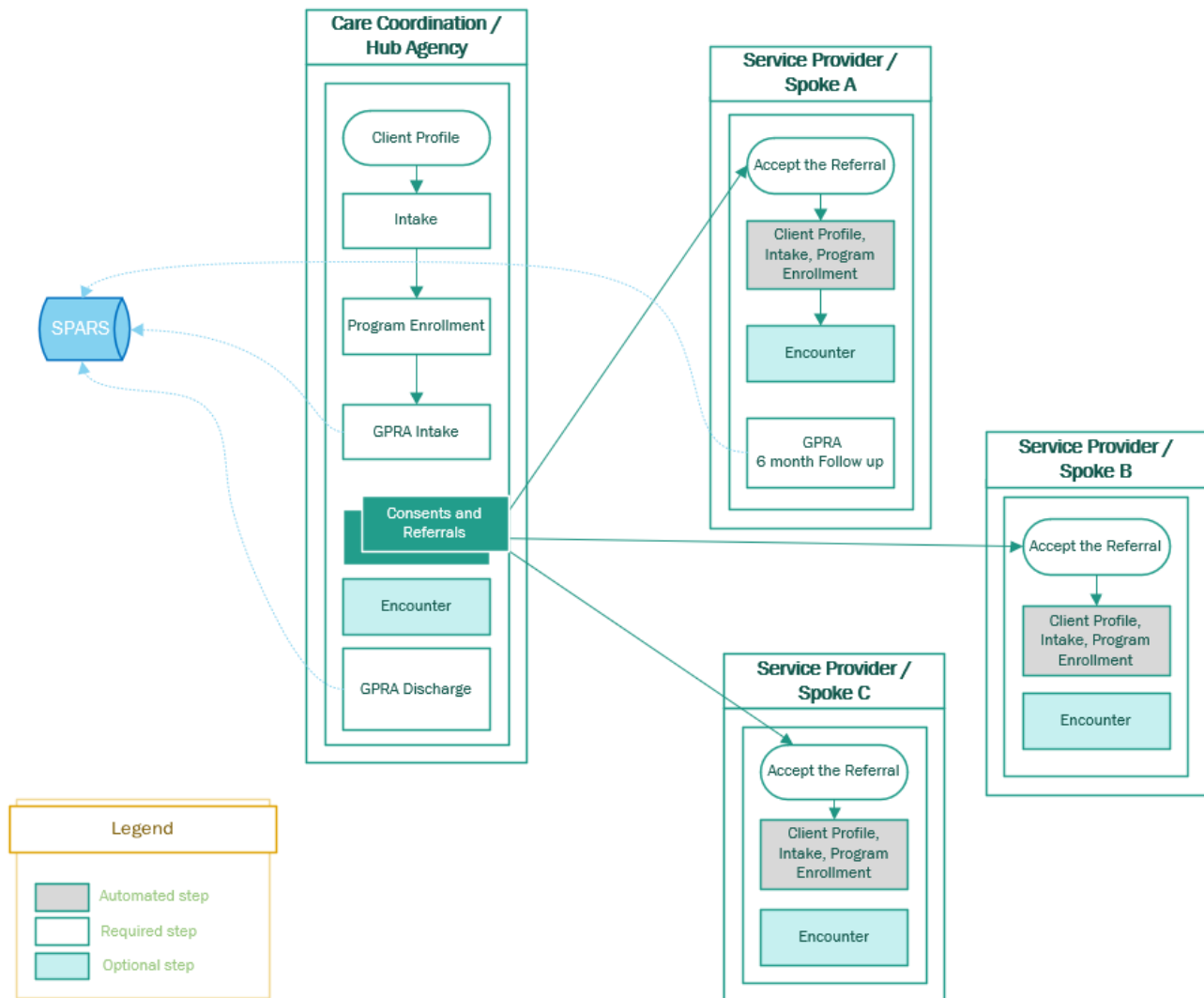


Figure 1-1: Standard SOR Workflow Diagram



## 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).

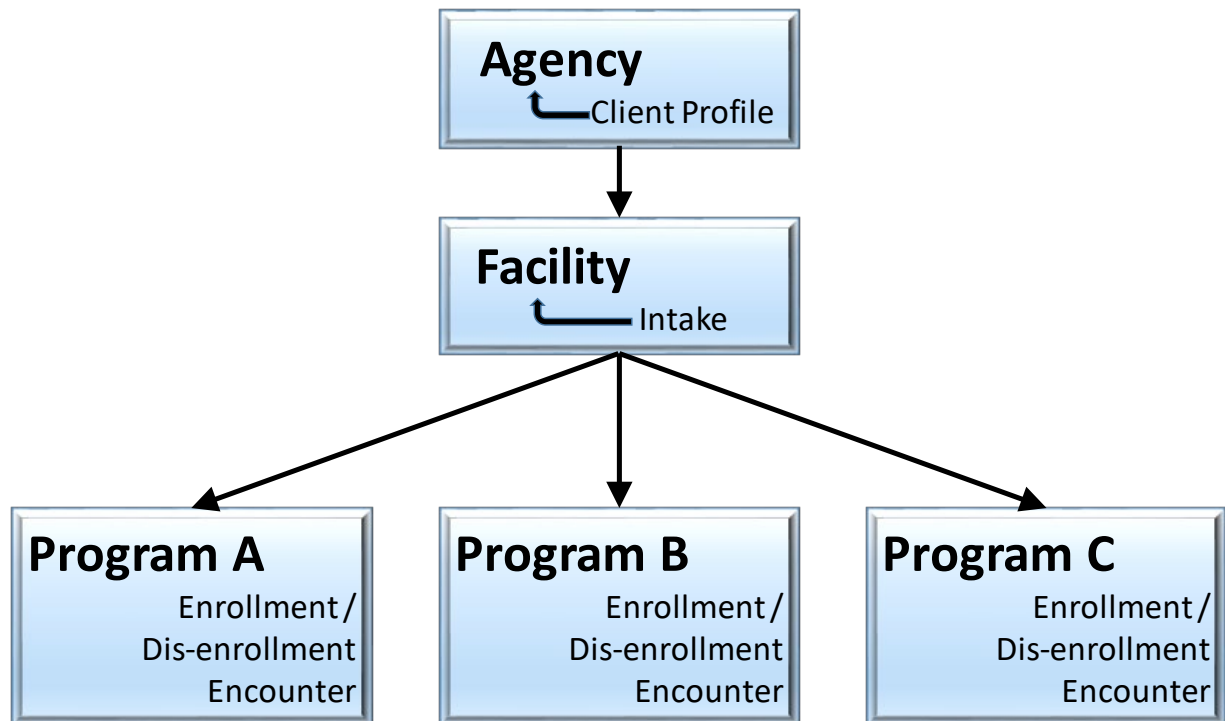


Figure 1-2: WITS Structure Overview

## 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
<b>GPRA Menu Item</b>	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.
<b>Grant Episode</b>	<p>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.</p> <ol style="list-style-type: none"> <li>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.</li> <li>2. The Grant Episode follows the client's UCN throughout the process of creating GPRAs.</li> <li>3. The 'Pending' grant episode will become 'Active' once the GPRA Intake interview is completed.</li> <li>4. It will remain active through the 6-Month Follow-Up and Discharge interviews.</li> <li>5. Once all 3 interviews are completed, the Grant Episode will have a status of 'Closed.'</li> <li>6. Once the Grant Episode is 'Closed', a new 'Pending' Grant Episode can then be created if the client needs treatment again.</li> <li>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)</li> </ol>

### WITS Administrator Process

#### Use Case: Client with GPRA intake at one provider goes to another provider without 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:

The following grant episode exists for this grant and UCN:

Agency Name	Facility Name	Interview Date	Gpra Interview Type
Administrative Agency	Administrative Unit	7/22/2019	Intake

Would you like to inactivate this grant episode so that a new GPRA intake interview is created within the current facility, and thus start a new grant episode where all interviews will need to be conducted for this client and this grant? Or Do you want to continue the existing grant episode at this location?

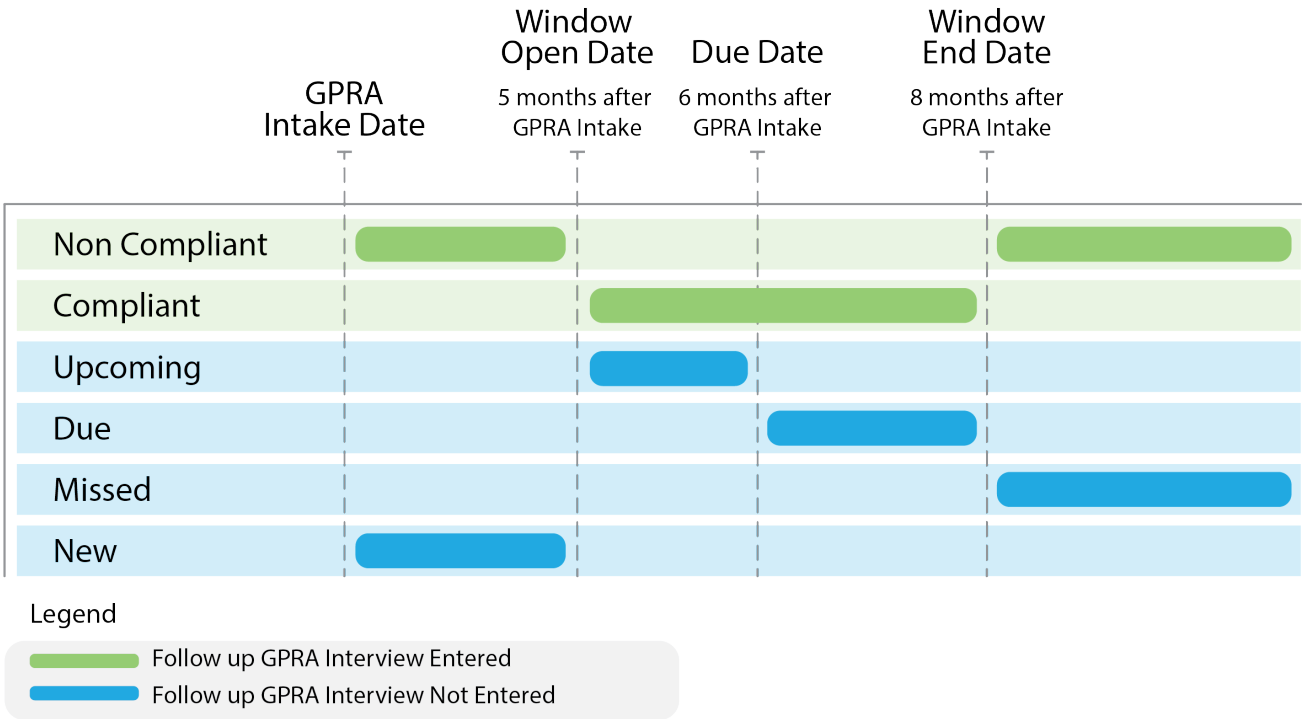
[Inactivate Episode](#) [Continue Episode](#) [Cancel](#)

- 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 <b>entered</b> into WITS <b>during</b> 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 <b>entered</b> into WITS <b>outside</b> 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 <b>Upcoming</b> count.

Term	Meaning
<b>Due</b>	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.
<b>Missed</b>	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 <b>Missed</b> count.
<b>New</b>	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 <b>New</b> 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
<b>Agency Type</b>	In the <b>Agency Type</b> search field, the option " <b>Intake</b> " represents the agency where the GPRA Intake Interview was conducted. The option, " <b>Follow-up</b> " represents any agency where the GPRA follow-up interview can be conducted.
<b>Grant</b>	This required field will be prepopulated with the SOR grant.
<b>Agency</b>	For users with access to only one agency, this field will default to that agency's name. If the user has <b>View GPRA Follow Up Compliance</b> and <b>All Agency Access</b> 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.
<b>Facility</b>	For users with access to only one facility, this field will default to that facility's name. If the user has <b>View GPRA Follow Up Compliance</b> and <b>All Agency Access</b> 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.

**Standard SOR QA**  
19.9.1

Administrative Agency, Administrative Unit

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Home Page

Agency

- Agency List
- GPRA Discharge Due
- GPRA Follow-up Due Summary
- GPRA Follow-up Due Detail
- Overdose Reversal Kits
- Facility List
- Staff Members
- Alerts Configuration
- Group List
- Client List
- System Administration
- Reports
- Support Ticket

GPRA Follow-up Interview Due Summary Search

Agency Type Intake Grant SOR

Agency ALL

Facility

Clear Go

GPRA Follow-up Interview Due Summary List (Export)

Actions	Status	Distinct GPRA Count
	Compliant	2
	Due	1
	Missed	7
	New	7
	Non Compliant	5
	Upcoming	1

Compliance Rate 13 %

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.








GPRA Follow-up Interview Due Summary List ( <a href="#">Export</a> )		
Actions	Status	Distinct GPRA Count
	Compliant	2
	Due	1
	Missed	7
	New	7
	Non Compliant	5
	Upcoming	1
<div><div>Details</div><div>Compliance Rate 13 % </div></div>		

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
<b>Agency Type</b>	In the <b>Agency Type</b> search field, the option " <b>Intake</b> " represents the agency where the GPRA Intake Interview was conducted. The option, " <b>Follow-up</b> " represents any agency where the GPRA follow-up interview can be conducted.
<b>Grant</b>	This required field will be prepopulated with the SOR grant.
<b>Agency</b>	For users with access to only one agency, this field will default to that agency's name. If the user has <b>View GPRA Follow Up Compliance</b> and <b>All Agency Access</b> 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.
<b>Facility</b>	For users with access to only one facility, this field will default to that facility's name. If the user has <b>View GPRA Follow Up Compliance</b> and <b>All Agency Access</b> 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.
<b>Status</b>	The <b>Status</b> search field will filter the list of clients corresponding to a specific compliance status. For definitions of each status, see <i>Table 1-2: Follow up Attendance Definitions</i> on page 5 above.

[Home Page](#)

- ▼ **Agency**
  - Agency List
  - GPRA Discharge Due
  - GPRA Follow-up Due Summary
  - GPRA Follow-up Due Detail
  - Overdose Reversal Kits
- ▼ **Facility List**
  - Staff Members
  - Alerts Configuration
- ▼ **Group List**
- ▼ **Client List**
- ▼ **System Administration**
- Reports**

### GPRA Follow-up Interview Due Detail Search

Agency Type 
Grant

Agency 
Facility

GPRA Intake Date 
First Name

Due Date 
Last Name

Status 
Unique Client Number

### GPRA Follow-up Interview Due Detail List (Export)

Actions	Unique Client Number	Client Name	Agency Name	Facility Name	Status	GPRA Intake Date	Due Date	Followup Open Date	Followup Close Date

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.

**i** The records on this list may not match the total from the summary because you may not have access to some clients. ✕



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The records on this list may not match the total from the summary because you may not have access to some clients.

### GPRA Follow-up Interview Due Detail Search

Agency Type: Intake | Grant: SOR

Agency: ALL | Facility: | GPRA Intake Date: | Due Date: | Status: Upcoming

First Name: | Last Name: | Unique Client Number: |

Clear Go

### GPRA Follow-up Interview Due Detail List (Export)

Actions	Unique Client Number	Client Name	Agency Name	Facility Name	Status	GPRA Intake Date	Due Date	Followup Open Date	Followup Close Date
	J553779EN601544	jain, Rekha	Newest SOR Agency	facility 1	Upcoming	4/18/2019	10/18/2019	9/18/2019	12/18/2019

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.”*

### GPRA Follow-up Interview Due Detail Search

Agency Type: Intake | Grant: SOR

Agency: ALL | Facility: | GPRA Intake Date: | Due Date: | Status: Upcoming

First Name: | Last Name: | Unique Client Number: |

Clear Go

### GPRA Follow-up Interview Due Detail List (Export)

Actions	Unique Client Number	Client Name	Agency Name	Facility Name	Status	GPRA Intake Date	Due Date	Followup Open Date	Followup Close Date
<b>View</b>	J553779EN601544	jain, Rekha	Newest SOR Agency	facility 1	Upcoming	4/18/2019	10/18/2019	9/18/2019	12/18/2019

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
<b>Agency</b>	For users with access to only one agency, this field will default to that agency’s name. If the user has <b>All Agency Access</b> roles, then this field will display all the agencies.
<b>Grant</b>	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.

Actions	Client ID	Client Name	Intake Interview Agency	Intake Date	Intake Interview Date	Last Activity Date
	117	singh, Praneeli	AgencySor1	7/18/1991	5/31/2019	
	119	Sano, Rhea	Administrative Agency	1/16/2019	2/28/2019	8/30/2019
	78	SOR, Nicole	Administrative Agency	1/23/2019	6/4/2019	
<b>View Client</b>	126	Jainh, Muskan	Administrative Agency	1/1/2019	7/1/2019	9/30/2019
	112	Aggarwal, Divya	Administrative Agency	12/25/2018	7/1/2019	

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.

Actions	Name	Display Name	Description
	A Simpler Way Recovery Homes	ASWRH	
	Administrative Agency	DMHDDSAS	Domain: SBIRT   Agency Type: Single State Agency   (Contractor)
	Alcohol / Drug Council of NC, Inc	Alcohol / Drug	Domain(s): ATR   Agency Type: RSS   ATR Provider

Figure 2-1: Agency List screen

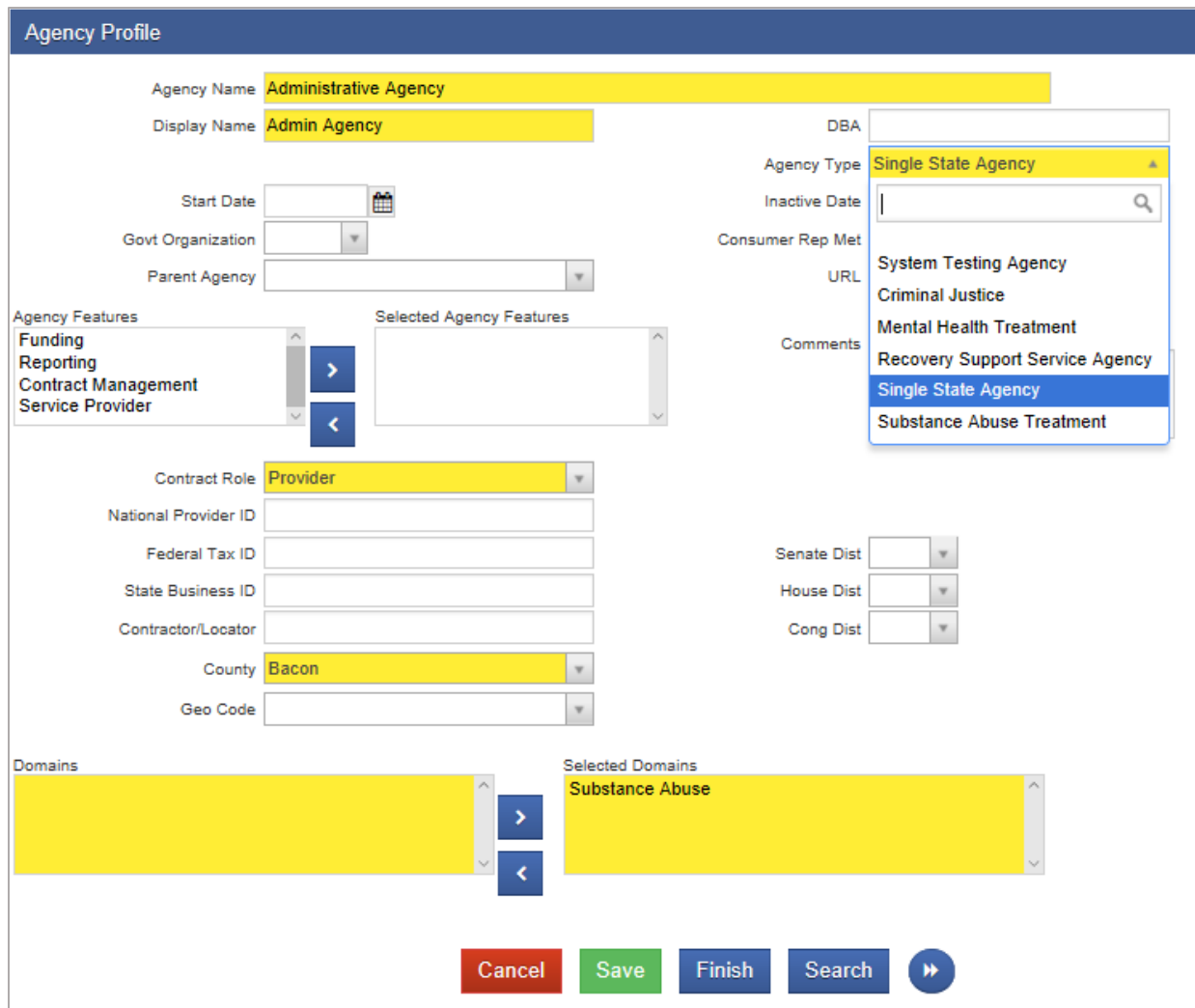
3. On the **Agency Profile** screen, enter the information as shown in the table below.

Table 2-1. Agency Profile Fields

Field Name	Description
<b>Agency Name</b>	Type the agency's name.
<b>Display Name</b>	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. <b>Note:</b> There is a 15-character limit for this field.
<b>Agency Type</b>	Select from the drop-down menu.
<b>Contract Role</b>	Select "Provider".
<b>County</b>	Select from the drop-down menu.
<b>Domains</b>	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.



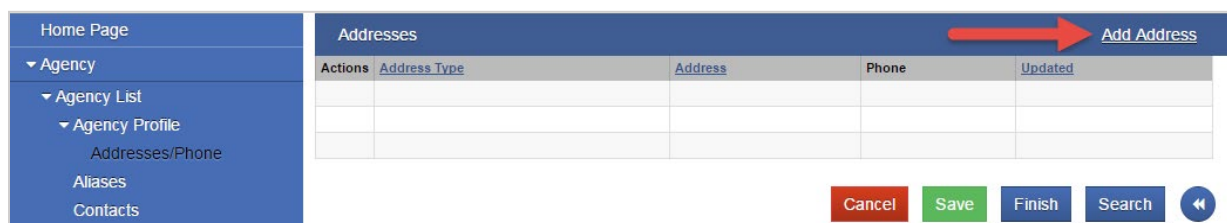
The Agency Profile screen contains the following fields and sections:

- Agency Name:** Administrative Agency
- Display Name:** Admin Agency
- DBA:** (empty)
- Agency Type:** Single State Agency (dropdown menu is open showing options: System Testing Agency, Criminal Justice, Mental Health Treatment, Recovery Support Service Agency, Single State Agency, Substance Abuse Treatment)
- Inactive Date:** (empty)
- Consumer Rep Met:** (empty)
- URL:** (empty)
- Comments:** (empty)
- Start Date:** (calendar icon)
- Govt Organization:** (dropdown)
- Parent Agency:** (dropdown)
- Agency Features:** Funding, Reporting, Contract Management, Service Provider
- Selected Agency Features:** (empty)
- Contract Role:** Provider
- National Provider ID:** (empty)
- Federal Tax ID:** (empty)
- State Business ID:** (empty)
- Contractor/Locator:** (empty)
- County:** Bacon
- Geo Code:** (empty)
- Senate Dist:** (empty)
- House Dist:** (empty)
- Cong Dist:** (empty)
- Domains:** (empty)
- Selected Domains:** Substance Abuse

Buttons at the bottom: Cancel, Save, Finish, Search, and a right arrow button.

Figure 2-2: Agency Profile screen

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



The Address/Phone List screen shows a table with the following columns: Actions, Address Type, Address, Phone, and Updated. A red arrow points to the **Add Address** link in the top right corner. The bottom of the screen contains buttons: Cancel, Save, Finish, Search, and a left arrow button.

Figure 2-3: Address/Phone List screen

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

Table 2-2: Address Information Fields

Field	Description
<b>Address Type</b>	Select from the drop-down menu.

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

Figure 2-4: Address Information screen

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

Figure 2-5: Add Phone Number

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

Figure 2-6: Address/Phone screen

- 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
<b>Disclosing Agency</b>	Select the name of your agency from the drop-down menu.
<b>Receiving Agency</b>	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
<b>Receiving Entity (Non System Agency)</b>	If this disclosure agreement applies to an agency outside of WITS, type that agency's name in this field.
<b>Global Policy? (Available To All Agencies)</b>	Select Yes or No.
<b>Always Verify Consent</b>	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
<b>Expiration Type and + Days</b>	Select either "Discharge (UD)" or "Date Signed (DS)", then when the yellow field appears, enter the number of days the consent will expire.
<b>Consent Options</b>	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.

**Agency Disclosure Domain**

Disclosing Agency

Administrative Agency

Receiving Agency

Global Policy or Non Syst...

Receiving Entity(Non System Agency)

Global Policy? (Available To All Agencies)

Yes

Always Verify Consent?

Yes

**Disclosure Domain Selection**

**Client Information To Be Consented**

Expiration Type

Discharge(UD)

+ Days

\*Expiration type is required for disclosure activities.

Consent Options

Behavioral Health Assessment

CAGE-AID Screening

CONTINUUM Triage™ Assessment

CONTINUUM™

DENS ASI Assessment

DENS ASI Lite

Selected Options

Admission (UD, +30)

ASAM (UD, +30)

Client Information (Profile) (UD, +30)

Client Screening (UD, +30)

Consent (UD, +30)

Intake Transaction (UD, +30)

**Comments**

Cancel

Save

Finish

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
<b>Discharge GPRA Creation</b>	Alert for notifying if a discharge GPRA is created for a client.
<b>Follow up GPRA Creation</b>	Alert for notifying if a follow-up GPRA is created for a client.
<b>GPRA Follow up Due</b>	Indicates the clients where a six-month follow up GPRA interview is due.
<b>Inactive Client GPRA Discharge</b>	Alert for notifying if client is inactive and if Discharge GPRA must be conducted.
<b>Intake GPRA Creation</b>	Alert for notifying if an intake GPRA is created for a client
<b>Intake GPRA Interview</b>	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**.

The screenshot shows the WITS Standard SOR QA interface. The left sidebar contains a menu with 'System Administration' expanded, showing various options including 'Alert Types'. The main content area displays the 'Alert Type List' table. The table has the following columns: Actions, Alert Category, Alert Type, Description, Enabled, Trigger, To Staff, and Configurable by Facility. A red arrow points to the 'Enable' button in the Actions column for the 'Plan of Care Approval' alert.

Actions	Alert Category	Alert Type	Description	Enabled	Trigger	To Staff	Configurable by Facility
	Client	Close Intake after # days	Indicates clients with an Intake at least # days old.	F	Client Intake Date	WITS Administrator; Agency Administrator; Case Assigned To	T
	Client	Plan of Care Review Approval Required	Team signature is required for the Plan of Care Review for approval	F	Team signature is required for review approval	Treatment team member; Treatment Team Attending Physician; Admitted By; Agency Administrator; Treatment Team Case Manager; Case Assigned To	T
	Client	Plan of Care Approval	Team signature is required for the Plan of Care for approval	F	Team signature is required for plan approval	Treatment team member; Treatment Team Attending Physician; Admitted By; Agency Administrator; Treatment Team Case Manager; Case Assigned To	T
	Client	Rejected Claim Item	Alert for notifying if a claim item has been rejected for a client	T	Claim Item Rejection Date	Encounter Release to Billing Staff; Clinical supervisor; Release to Billing; Tx Encounter Full; WITS Administrator; Treatment team Primary care staff member; Staff Manager; State Admin Staff; Agency Staff; Staff Created; Agency Administrator; Case Assigned To	T
	Client	Client Outcomes Due	Indicates the clients who are due for an outcomes survey.	T	Program enrollment date	Treatment team Primary care staff member; Admitted By; Agency Administrator; Treatment Team Case Manager; Case Assigned To	T

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

Field	Description
<b>Which staff should receive the message?</b>	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.
<b>Should message turn red when overdue?</b>	Select Yes or No.
<b>Include cases where no level of care indicated</b>	Select Yes or No.
<b>Facility</b>	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.
<b>Alert should stop being displayed this many days after it is generated</b>	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**.

**Standard SOR QA** 19.9.0 State Agency, State Facility Jones, Ashley Logout

SSRS Reports Snapshot

**Agency Alert Configuration Profile**

Configuration Type: Agency Type Agency Type: Substance Abuse Treatment

Alert Name: GPRA Follow up Interview Due Alert Type: GPRA Followup Due

Trigger Point: GPRA Intake interview date Alert Category: Client

Alert Description: Indicates the ATR clients where a six-month followup GPRA interview is due

What message should appear to users? This client will be due for a follow up GPRA Interview soon. Please contact the client to schedule a follow up interview.

When is the next activity due (days after the trigger point)? 150

How many days prior to the due date should this alert show up? 145

Which staff should receive the message? Case Assigned To

Should message turn red when overdue? Yes

Alert should stop being displayed this many days after it is generated: 30

Effective Date: 3/01/2019 Expiration Date:

Cancel Save Finish

Figure 2-11: Agency Alert Configuration Profile

Which staff should receive this message?

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

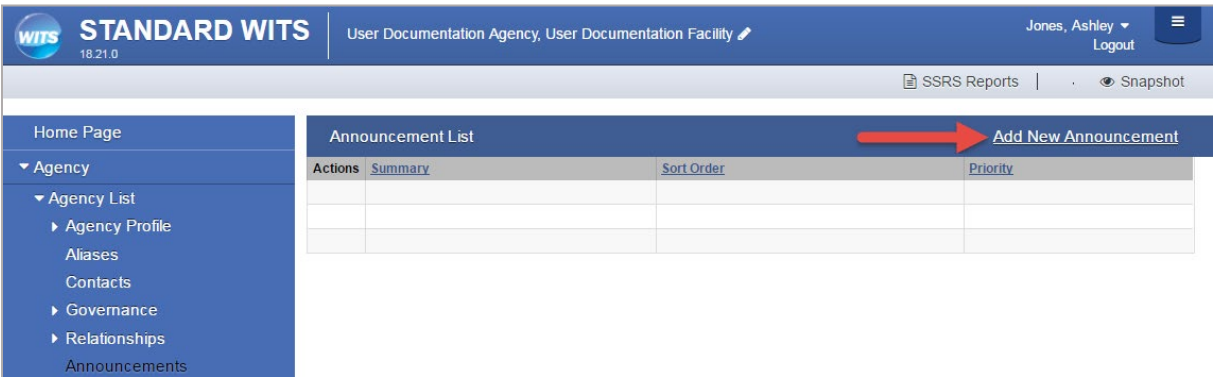
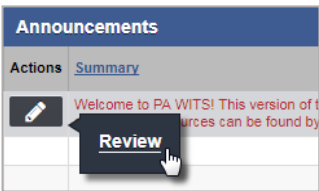


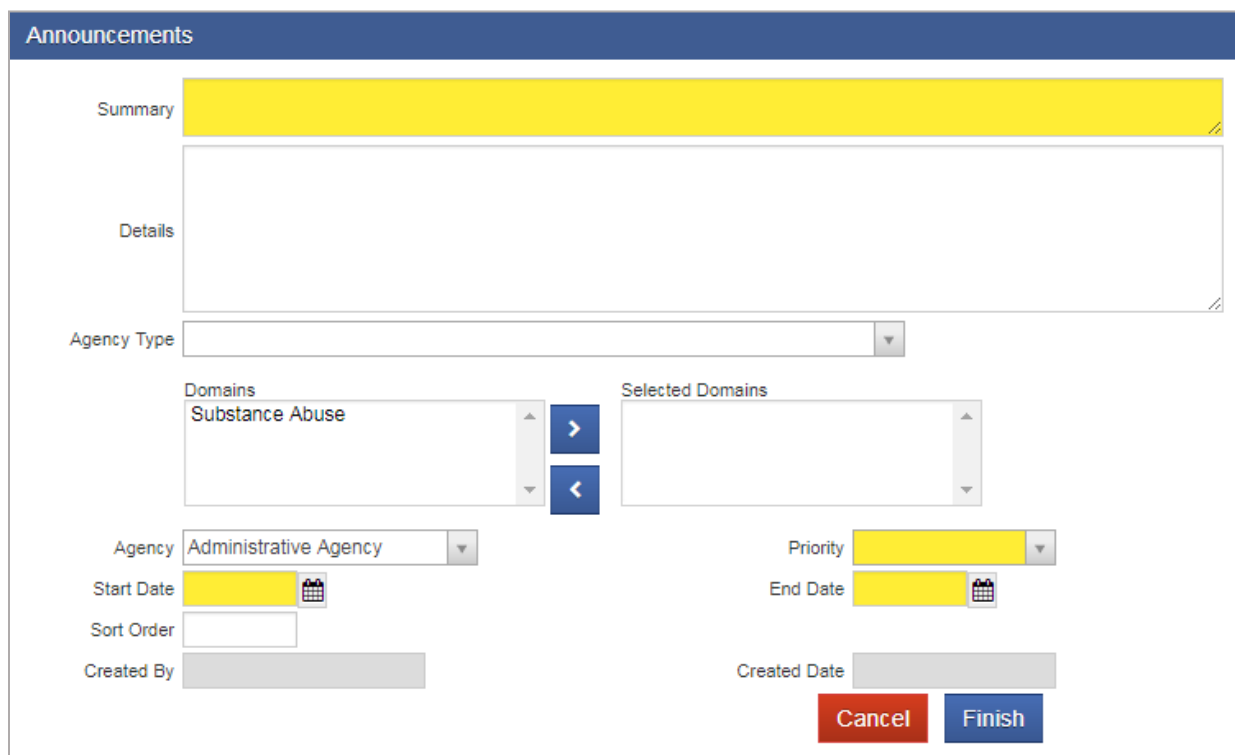
Figure 2-13: Announcements List screen

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



**Announcements**

Summary

Details

Agency Type

Domains

Selected Domains

Agency

Priority

Start Date

End Date

Sort Order

Created By

Created Date

Figure 2-14: Announcements screen

- 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.

Home Page	Announcement List			Add New Announcement	
				Sort Order	Priority
► State Waitlist	Actions				
▼ Agency	Summary				
▼ Agency List	Welcome to PA WITS! This version of the PA WITS system is dedicated to the collection of TEDS data since September 2015. Policy bulletin, QSOA, and training resources can be found by clicking the PA WITS tab at <a href="http://www.ddap.pa.gov">www.ddap.pa.gov</a>				H
► Agency Profile	Substance Abuse Domain Announcement				N
Aliases	agencies				N
Contacts					
► Governance					
► Relationships					
Announcements					

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.

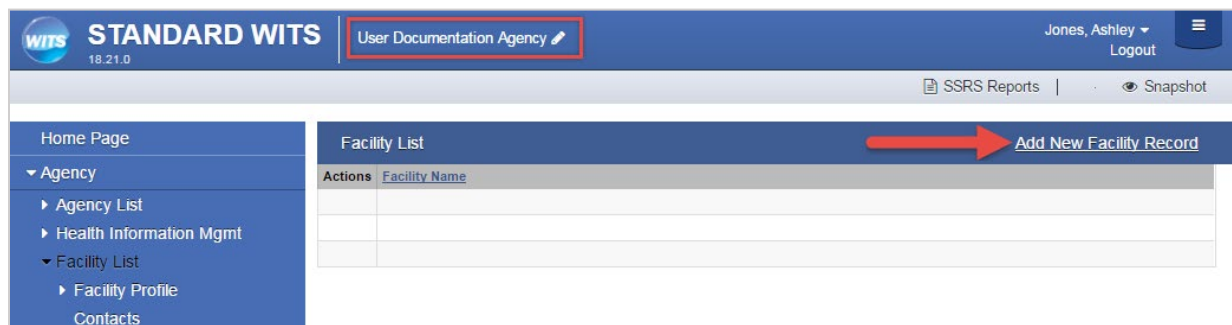


Figure 3-1: Facility List screen

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

Table 3-1. Facility Profile Fields

Field Name	Description
<b>Facility Name</b>	Type the facility's name.
<b>Display Name</b>	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.
<b>I-BHS #</b>	Required field, used in the TEDS/NOMS extract process
<b>Service Location</b>	Value selected will be the default value on the encounter Service Location field for encounters created for this agency and facility
<b>Operations Start/End Date</b>	Optional/Informational
<b>Reports Start/End Date</b>	Optional/Informational
<b>Contact</b>	Optional/Informational
<b>Alternate Contact</b>	Optional/Informational
<b>Facility ID</b>	Optional/Informational
<b>National Provider ID</b>	Optional/Informational (important when using WITS for billing)
<b>Senate Dist</b>	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

**Facility Profile**

Facility Name  Display Name

I-BHS State ID  Agency Name

Service Location

Operations Start/End Date   Reports Start/End Date

Contact  Alternate Contact

Senate Dist

National Provider ID

Federal Tax ID

House Dist

State Business ID

Cong Dist

Contractor/Locator

URL

County

Facility Description

Geo Code

**Approaches**

12-step  
Cognitive/Behavioral  
Family  
Humanistic/Existential

**Selected Approaches**

**Languages**

English  
Amharic  
Arabic  
American Sign Language

**Selected Languages**

Figure 3-2: Facility Profile screen

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



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

The screenshot shows the WITS interface with a left sidebar containing a menu: Home Page, Agency (expanded), Agency List, Facility List (expanded), Facility Profile (expanded), Addresses, and Contacts. The main content area is titled 'Addresses' and contains a table with columns: Actions, Address Type, Address, Phone, and Updated. A red arrow points to the 'Add Address' link in the top right corner. At the bottom right, there are buttons for 'Cancel', 'Save', 'Finish', and a back arrow.

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

The screenshot shows the 'STANDARD WITS 19.21.0' interface. The top header includes the WITS logo, 'User Documentation Agency, User Documentation Facility', and user information 'Jones, Ashley' with a 'Logout' link. Below the header, there are links for 'SSRS Reports' and 'Snapshot'. The left sidebar menu is the same as in Figure 3-3. The main content area is titled 'Address Information' and contains form fields for 'Address Type' (a dropdown menu), 'Confidential' (a 'No' button), 'Address Line 1', 'Address Line 2', 'City', 'State' (a dropdown menu), and 'Zip'. Below this is a section titled 'Phone Numbers' with an 'Add Phone' link and a table with columns: Actions, Type, and Number. At the bottom right, there are buttons for 'Cancel' and 'Finish'.

Figure 3-4: Facility Address screen

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

STANDARD WITS 18.21.0 | User Documentation Agency, User Documentation Facility | Jones, Ashley | Logout

SSRS Reports | Snapshot

Home Page

Agency

- Agency List
- Health Information Mgmt
- Facility List
  - Facility Profile
    - Addresses
    - Contacts
    - Special Services
    - Programs
    - Addiction Services
    - Operating Hours
    - Primary Staff Set Up

Address Information

Address Type: Unit administration Confidential: No

Address Line 1: 525 Cedar Run Road

Address Line 2:

City: Columbia State: MD Zip: 21046

Phone Numbers

[Add Phone](#)

Actions	Type	Number

Cancel Finish

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

Home Page

Agency

- Agency List
- Health Information Mgmt
- Facility List
  - Facility Profile
    - Addresses
    - Contacts
    - Special Services

Address

Address Type: Unit administration Confidential: No

Address Line 1: 525 Cedar Run Road

Address Line 2:

City: Columbia State: Maryland Zip: 21046

Phone

Type: office Number: (410) 535-1234 Ext:

Cancel Finish

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

- Enter the phone number, and then click **Finish**.
- On the Address Information screen, click **Finish**.

STANDARD WITS 18.21.0 | User Documentation Agency, User Documentation Facility | Jones, Ashley | Logout

SSRS Reports | Snapshot

Home Page

Agency

- Agency List
- Health Information Mgmt
- Facility List
  - Facility Profile
    - Addresses
    - Contacts

Addresses

[Add Address](#)

Actions	Address Type	Address	Phone	Updated
	Unit administration	525 Cedar Run Road Columbia, MD 21046	office (410) 535-1234	5/22/2017

Cancel Save Finish

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

- 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**.

The screenshot shows the 'Contacts for Administrative Unit' screen. On the left is a navigation menu with 'Agency' expanded, showing 'Facility List' and 'Contacts'. The main area has a table with columns: Actions, Contact Type, Name, Status, Created, and Effective. Below the table is a form with fields for Staff, Contact Type, Effective Date, Status, and Manager Name. A red arrow points to the 'Add Contact' button in the top right corner of the form area. A 'Finish' button is at the bottom right.

Figure 3-8: Facility Contacts screen

3. Complete the fields.

This screenshot shows the same 'Add Contact' form as Figure 3-8, but with fields populated. The 'Staff' field is set to 'Garg, Deeksha', 'Contact Type' is 'Referral', 'Effective Date' is '7/1/2017', and 'Status' is 'Active'. The 'Manager Name' field is empty. At the bottom right, there are three buttons: 'Cancel' (red), 'Save' (green), and 'Finish' (blue).

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.

STANDARD WITS 18.21.0							
User Documentation Agency, User Documentation Facility						Jones, Ashley Logout	
SSRS Reports   Snapshot							
Home Page		Program List					
▼ Agency <ul style="list-style-type: none"> <li>▶ Agency List</li> <li>▶ Health Information Mgmt</li> <li>▼ Facility List               <ul style="list-style-type: none"> <li>▶ Facility Profile</li> <li>Contacts</li> <li>Special Services</li> <li>Programs</li> </ul> </li> </ul>		<a href="#">Add New Program Record</a>					
Actions	Program Name	Modality	# Slots	Current Enrolled	Residence	Gender Specific	Term

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"**.

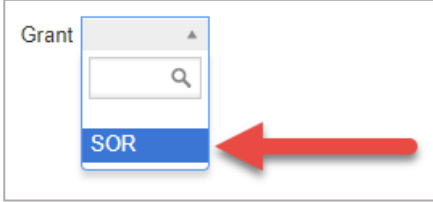


Figure 3-13: New Profile Setup screen

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

Table 3-3: Program Setup Fields <sup>2</sup>

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

<sup>2</sup> \*Fields marked with an asterisk (\*) are important for SOR programs. Make sure these fields are set up correctly.

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

**Program Setup**

Agency Name

Facility Name

Program Name

Display Name

Domain

Modality

Modality Specifier

Current Enrolled

Program Type

Level of care

Residence

Report to State

Report to TEDS

Grant

Available Reporting Guidelines

Selected Reporting Guidelines

Age Group

Gender Specific

Available Evidence-Based Practices

Selected Evidence-Based Practices

Program Start Date

End Date

**Cancel Save Finish**

Figure 3-14: Example of MAT Program Setup fields

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

Capacity List				
				<a href="#">Add New Capacity</a>
Actions	Capacity Type	Capacity	Start Date	End Date

- Complete the fields:

Table 3-4: Program Capacity Details fields

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





**Program Capacity Details**

Capacity Type: **Slots**

Daily Capacity: **20**

Start Date: **5/31/2017**

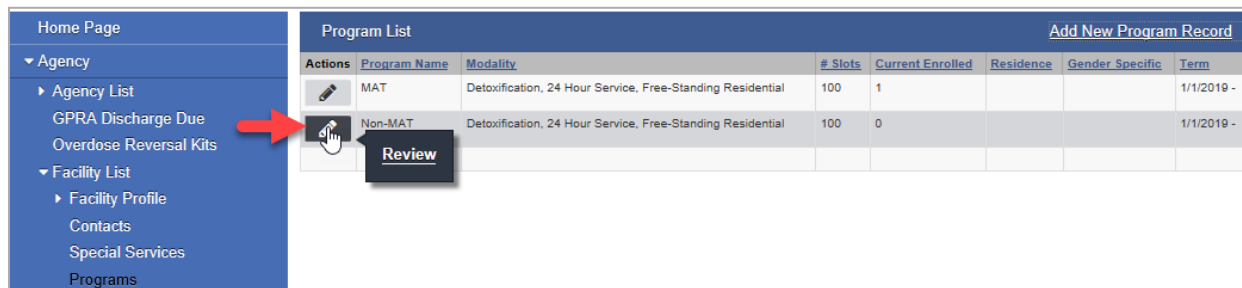
End Date:

Note:

**Cancel** **Save** **Finish**

Figure 3-15: Program Capacity Details screen

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



Home Page		Program List							<a href="#">Add New Program Record</a>
▼ Agency		Actions	Program Name	Modality	# Slots	Current Enrolled	Residence	Gender Specific	Term
▶ Agency List GPRA Discharge Due Overdose Reversal Kits ▼ Facility List ▶ Facility Profile Contacts Special Services Programs			MAT	Detoxification, 24 Hour Service, Free-Standing Residential	100	1			1/1/2019 -
			Non-MAT	Detoxification, 24 Hour Service, Free-Standing Residential	100	0			1/1/2019 -

## 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.

 **STANDARD WITS**  
18.21.0
User Documentation Agency, User Documentation Facility 
Jones, Ashley ▾  
[Logout](#)
☰

---

[SSRS Reports](#) | 
 [Snapshot](#)

Home Page

▸ Agency

  ▸ Agency List

  ▸ Health Information Mgmt

▸ Facility List

  ▸ Facility Profile

    Contacts

    Special Services

    Programs

    Addiction Services

    Operating Hours

    Primary Staff Set Up

    Inpatient Unit

  Staff Members

▸ Billing

▸ Contract Management

  Alerts Configuration

▸ Group List

Clinical Dashboard

▸ Client List

▸ System Administration

### Facility Operating Hours

\* Please enter times below in hh:mm format followed by "am" or "pm"(ex: 08:30 AM)

\* You can create multiple ranges within one day, like 9:00 am - 11:00 am, then 1:00 pm - 3:00 pm.

Set Tuesday to Friday same as Monday

Day	Range 1	Range 2	Range 3
Monday	<input type="text" value="8:00 AM"/> - <input type="text" value="12:00 PM"/>	<input type="text" value="12:30 PM"/> - <input type="text" value="8:00 PM"/>	<input type="text"/> - <input type="text"/>
Tuesday	<input type="text" value="8:00 AM"/> - <input type="text" value="12:00 PM"/>	<input type="text" value="12:30 PM"/> - <input type="text" value="8:00 PM"/>	<input type="text"/> - <input type="text"/>
Wednesday	<input type="text" value="8:00 AM"/> - <input type="text" value="12:00 PM"/>	<input type="text" value="12:30 PM"/> - <input type="text" value="8:00 PM"/>	<input type="text"/> - <input type="text"/>
Thursday	<input type="text" value="8:00 AM"/> - <input type="text" value="12:00 PM"/>	<input type="text" value="12:30 PM"/> - <input type="text" value="8:00 PM"/>	<input type="text"/> - <input type="text"/>
Friday	<input type="text" value="8:00 AM"/> - <input type="text" value="12:00 PM"/>	<input type="text" value="12:30 PM"/> - <input type="text" value="8:00 PM"/>	<input type="text"/> - <input type="text"/>
Saturday	<input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/>
Sunday	<input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/>

Cancel
Save
Finish

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

Table 4-2: Workspace Screen Icons/Buttons

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

Table 4-3: Workspace Screen Data Fields






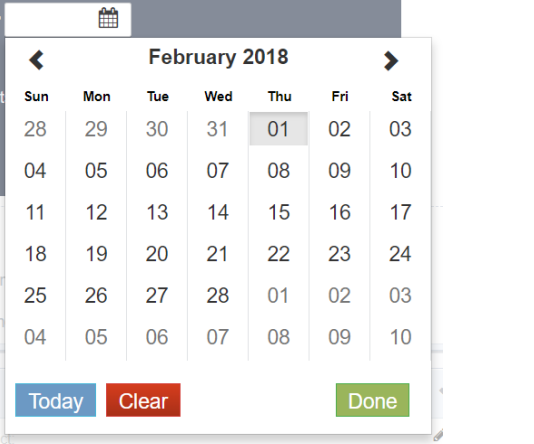
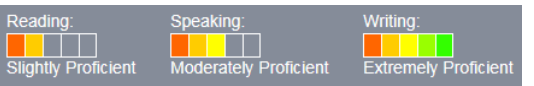
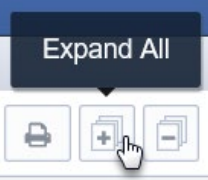


Field	Description
	<b>Required Field:</b> Required fields are marked with a red line on the right side. This field must be completed to save the screen/panel.
	<b>Optional Field:</b> This field may be left blank.
	<b>Drop-down field:</b> Select one option from the list.
	<b>Error Message:</b> The error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

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

Field	Description		
	<b>Expand All:</b> Expands all collapsed panels on workspace screen.		<b>Collapse All:</b> Collapses all expanded panels on workspace screen.
	<b>Collapsible Menu:</b> 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").

STANDARD WITS 18.39.0 Administrative Agency, Administrative Unit Jones, Ashley Logout

SSRS Reports Snapshot

MENU Staff Member Search

Search Advanced Search Create New Staff Member

Search...

Search

Showing 1-50 of 241 Previous 1 2 3 4 5 Next Select Columns Select View

	First Name	Last Name	Agency	Status	Email	Identifier	Start Date	Termination Date
	Ron	Swanson	Administrative Agency	Active	ron.swanson@pawnee.in.gov	RSwanson177	10/01/2013	09/25/2018
	Admin	User	Administrative Agency	Active	noreply@feisystems.com	admin	01/01/2009	
	Bobby	Mantoni	Administrative Agency	Locked	bmantoni@feinfo.com	bmantoni	04/16/1987	01/08/2010
	Chris	White	Administrative Agency	Active	cwhite@feinfo.com	cwhite	04/16/2009	
	Gagan	Singh	Administrative Agency	Active	gsingh@feinfo.com	gsingh	10/02/2075	04/09/2085

Figure 4-1: Staff Member Search/List screen

### Table View

Showing 1-1 of 1 Previous 1 Next Select Columns Select View

	First Name	Last Name	Status	Email	Identifier	Start Date	Termination Date
	Ash	Jones	Active	ashley.jones@feisystems.com	standard.admin	01/01/2017	

Lock Agency Access Reset Credentials View Profile

### Panel View

Showing 1-1 of 1 Previous 1 Next Select Columns Select View

**Ash Jones** Lock Agency Access Reset Credentials View Profile

Active

ashley.jones@feisystems.com

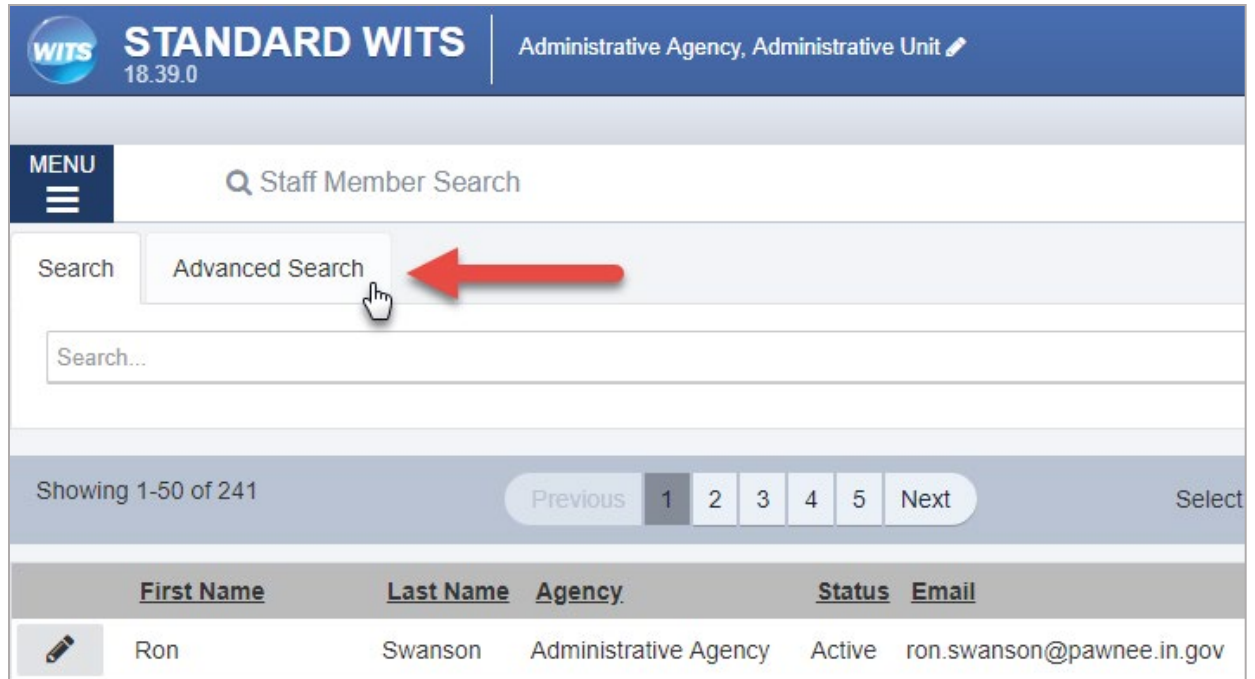
standard.admin

Sun Jan 01 2017 00:00:00 GMT-0500 (Eastern Standard Time)

Previous 1 Next

## Advanced Search

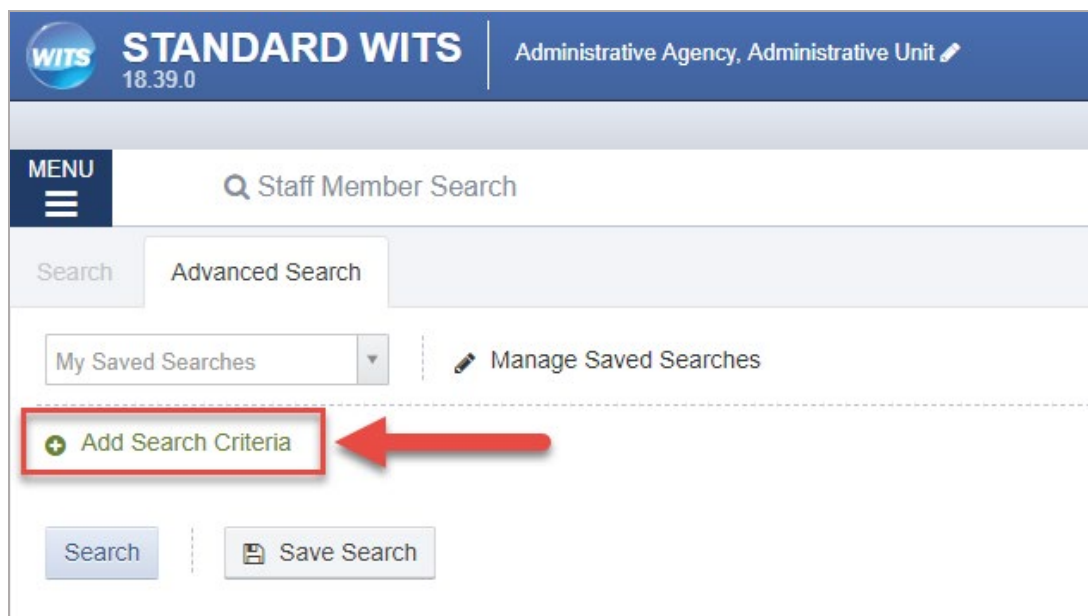
1. On the left menu, click **Agency**, and then click **Staff Members**.
2. Click the **Advanced Search** tab.



The screenshot shows the STANDARD WITS 18.39.0 interface. The top header includes the WITS logo and the text "STANDARD WITS 18.39.0" and "Administrative Agency, Administrative Unit". A left sidebar menu is visible with a "MENU" button. The main area is titled "Staff Member Search". Below the title, there are two tabs: "Search" and "Advanced Search". The "Advanced Search" tab is selected, indicated by a red arrow pointing to it. Below the tabs is a search input field labeled "Search...". Further down, there is a pagination bar showing "Showing 1-50 of 241" and buttons for "Previous", "1", "2", "3", "4", "5", "Next", and "Select". Below the pagination bar is a table with columns: "First Name", "Last Name", "Agency", "Status", and "Email". The table contains one row with the following data: "Ron", "Swanson", "Administrative Agency", "Active", and "ron.swanson@pawnee.in.gov".

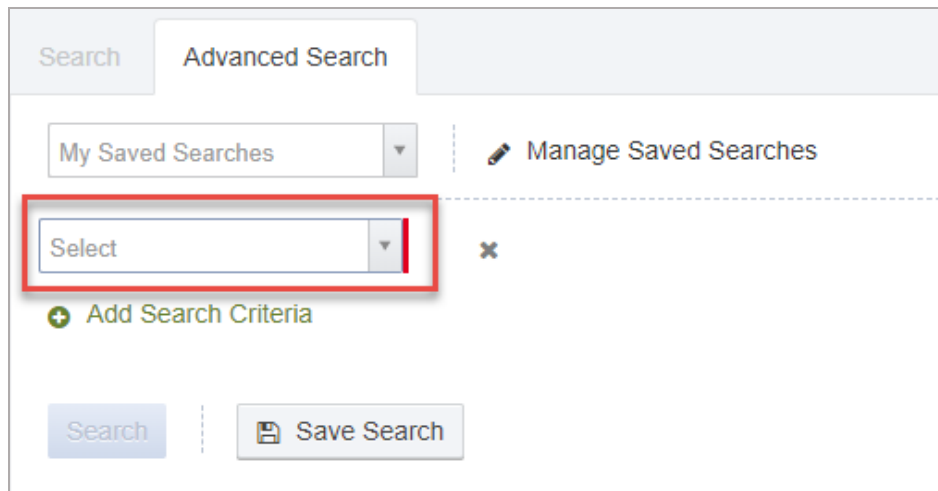
Figure 4-2: Advanced Search tab

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



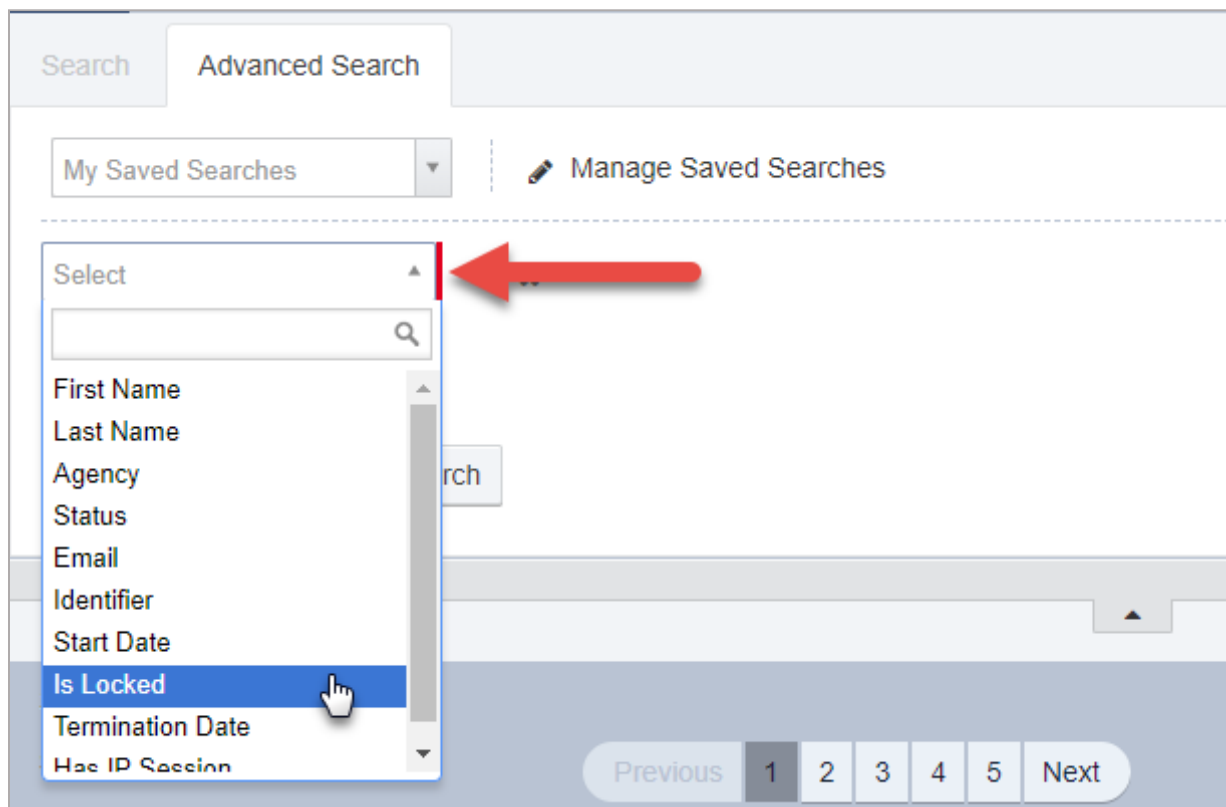
The screenshot shows the STANDARD WITS 18.39.0 interface. The top header includes the WITS logo and the text "STANDARD WITS 18.39.0" and "Administrative Agency, Administrative Unit". A left sidebar menu is visible with a "MENU" button. The main area is titled "Staff Member Search". Below the title, there are two tabs: "Search" and "Advanced Search". The "Advanced Search" tab is selected. Below the tabs, there is a dropdown menu labeled "My Saved Searches" and a button labeled "Manage Saved Searches". Below these, there is a button labeled "Add Search Criteria" which is highlighted with a red box and a red arrow pointing to it. Below the "Add Search Criteria" button are two buttons: "Search" and "Save Search".

Figure 4-3: Add Search Criteria



The screenshot shows the 'Advanced Search' tab in a web application. At the top, there are two tabs: 'Search' and 'Advanced Search'. Below the tabs, there is a section for 'My Saved Searches' with a dropdown menu and a 'Manage Saved Searches' link. A red rectangular box highlights the 'Select' dropdown menu. Below the dropdown, there is a '+ Add Search Criteria' button. At the bottom, there are 'Search' and 'Save Search' buttons.

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

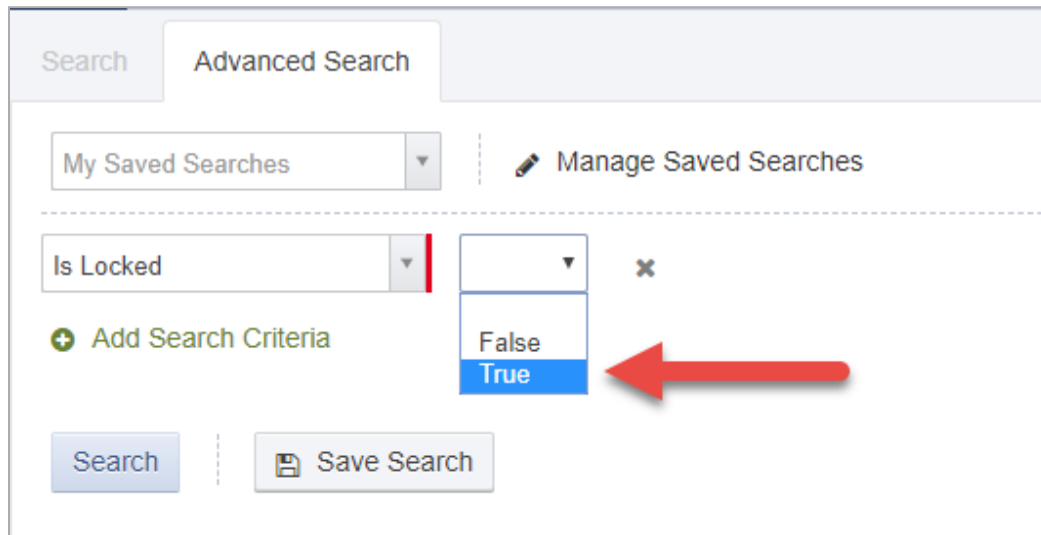


This screenshot shows the 'Advanced Search' interface with the 'Select' dropdown menu open. A red arrow points to the 'Is Locked' option, which is highlighted in blue. The dropdown menu lists the following search criteria: First Name, Last Name, Agency, Status, Email, Identifier, Start Date, Is Locked, Termination Date, and Has ID Session. At the bottom of the interface, there is a pagination bar with 'Previous', '1', '2', '3', '4', '5', and 'Next' buttons.

Figure 4-4: Advanced Search Selection



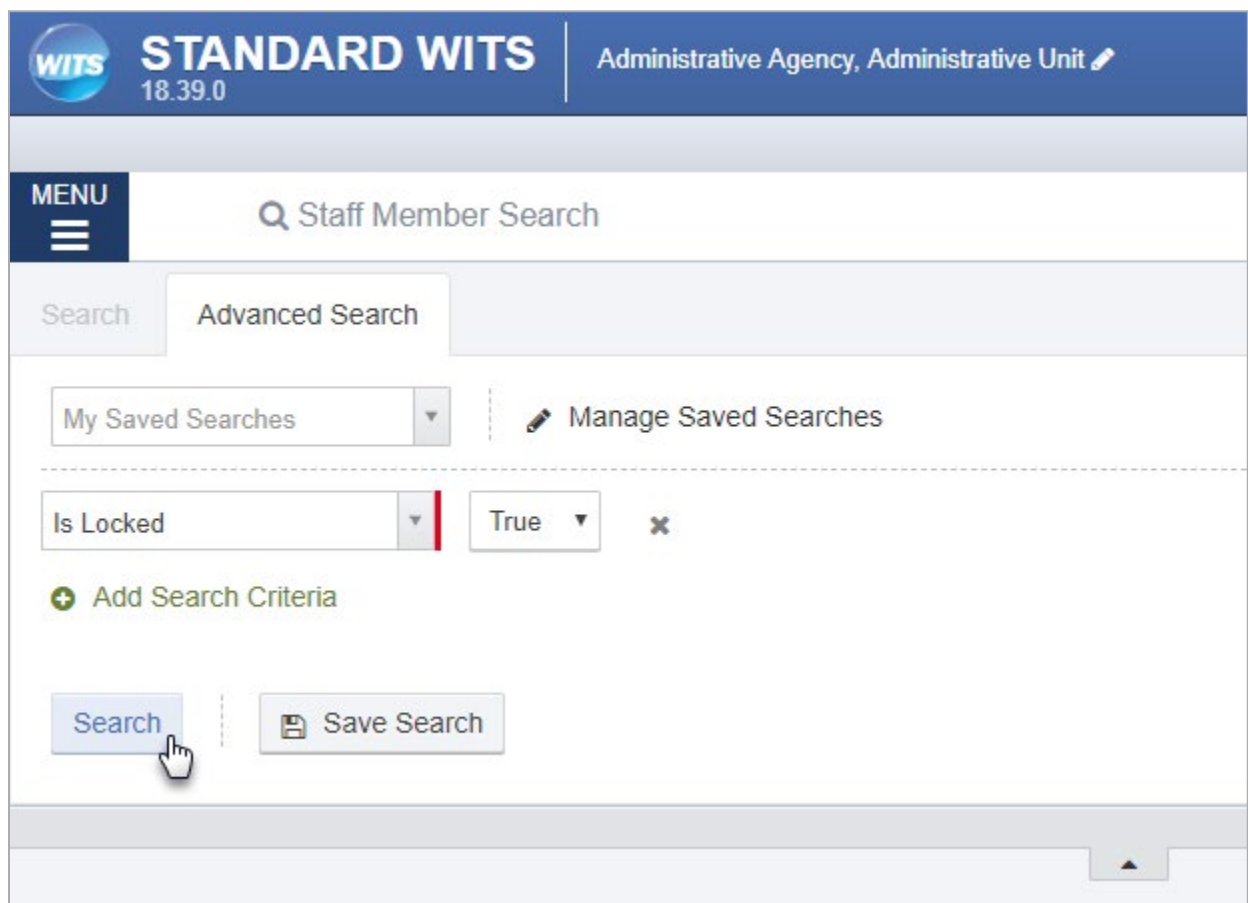
- Based on the option selected, additional field(s) will be displayed to select further search criteria. In this example, select True or False.



The screenshot shows the 'Advanced Search' tab in the WITS system. At the top, there are two tabs: 'Search' and 'Advanced Search'. Below the tabs, there is a section for 'My Saved Searches' with a dropdown menu and a 'Manage Saved Searches' link. The main search area contains a dropdown menu labeled 'Is Locked' with a red vertical bar on its right side. A dropdown menu is open, showing 'False' and 'True' options. A red arrow points to the 'True' option. Below the dropdown menu, there is a '+ Add Search Criteria' link. At the bottom, there are two buttons: 'Search' and 'Save Search'.

Figure 4-5: Additional Advanced Search Criteria

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



The screenshot shows the 'Advanced Search' tab in the WITS system. At the top, there is a blue header bar with the 'WITS' logo, 'STANDARD WITS 18.39.0', and 'Administrative Agency, Administrative Unit' with a pencil icon. Below the header bar, there is a 'MENU' button with a hamburger icon. The main search area contains a dropdown menu labeled 'Is Locked' with a red vertical bar on its right side. A dropdown menu is open, showing 'True' and 'False' options. Below the dropdown menu, there is a '+ Add Search Criteria' link. At the bottom, there are two buttons: 'Search' and 'Save Search'. A mouse cursor is clicking on the 'Search' button.

Figure 4-6: Advanced Search; Click Search

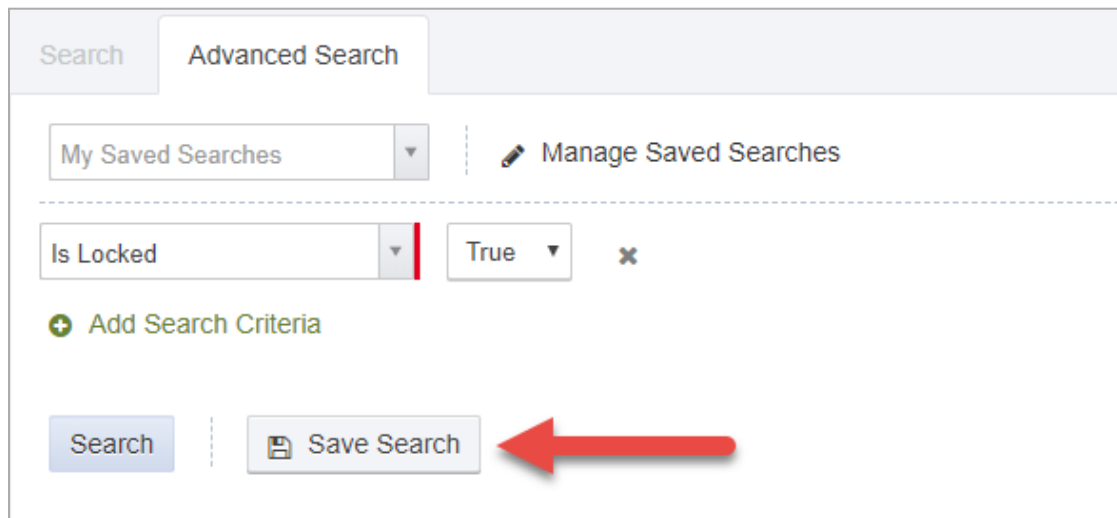
- The search results (if any) will be displayed in the list on screen.

The screenshot displays the STANDARD WITS Staff Member Search interface. The top navigation bar includes the WITS logo, version 18.39.0, the user name 'Jones, Ashley', and a 'Logout' button. A 'MENU' button is on the left. The main header area shows 'Administrative Agency, Administrative Unit' and links to 'SSRS Reports' and 'Snapshot'. The search interface has tabs for 'Search' and 'Advanced Search', with a 'Create New Staff Member' button. Below these are options for 'My Saved Searches' and 'Manage Saved Searches'. A search filter 'Is Locked' is set to 'True'. The search results section shows 'Search results for "true,"' and 'Showing 1-1 of 1'. A table lists the search results, with the 'Status' column highlighted in red for the entry 'Locked'. The table has columns for First Name, Last Name, Agency, Status, Email, Identifier, Start Date, and Termination Date. The result row shows Bobby Mantoni from the Administrative Agency, with a status of Locked, email bmantoni@feinfo.com, identifier bmantoni, start date 04/16/1987, and termination date 01/08/2010. Navigation buttons for 'Previous', '1', and 'Next' are present at the bottom of the results section.

First Name	Last Name	Agency	Status	Email	Identifier	Start Date	Termination Date
Bobby	Mantoni	Administrative Agency	Locked	bmantoni@feinfo.com	bmantoni	04/16/1987	01/08/2010

## Save Advanced Searches

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



The screenshot shows the 'Advanced Search' tab in a web application. At the top, there are two tabs: 'Search' and 'Advanced Search'. Below the tabs, there is a section titled 'My Saved Searches' with a dropdown arrow and a 'Manage Saved Searches' link. A search criterion is displayed: 'Is Locked' with a value of 'True'. Below this, there is a green plus icon and the text 'Add Search Criteria'. At the bottom, there are two buttons: 'Search' and 'Save Search'. A large red arrow points to the 'Save Search' button.

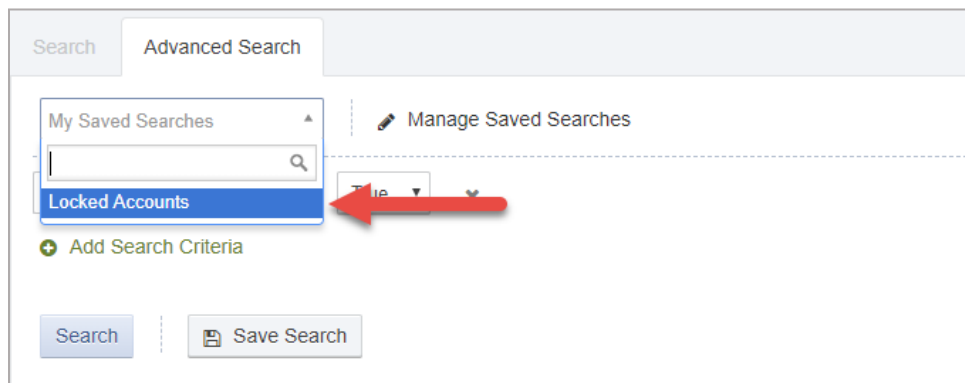
Figure 4-7: Advanced Search, Save Search

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



The screenshot shows a 'Save Your Search' dialog box. It has a title bar with a close button (X). Inside, there is a 'Name' label and a text input field containing 'Locked Accounts'. Below the input field, there are two buttons: 'Save' and 'Cancel'.

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.



The screenshot shows the 'Advanced Search' tab again. The 'My Saved Searches' dropdown menu is open, showing a list of saved searches. The first item, 'Locked Accounts', is highlighted with a blue background. A red arrow points to the 'Locked Accounts' item in the dropdown menu. The 'Is Locked' criterion and the 'Add Search Criteria' link are still visible below the dropdown. The 'Search' and 'Save Search' buttons are at the bottom.

## 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
<b>Prefix</b>	Optional field.
<b>First</b>	Type the staff member's first name.
<b>Preferred</b>	Optional field. Type the staff member's preferred first name.
<b>Middle</b>	Optional field.
<b>Last</b>	Type the staff member's last name.
<b>Suffix</b>	Optional field.
<b>Gender</b>	Select the staff member's gender from the drop-down list.

**Create New Staff Member**

Prefix:

First:

Preferred:

Middle:

Last:

Suffix:

Gender:

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.

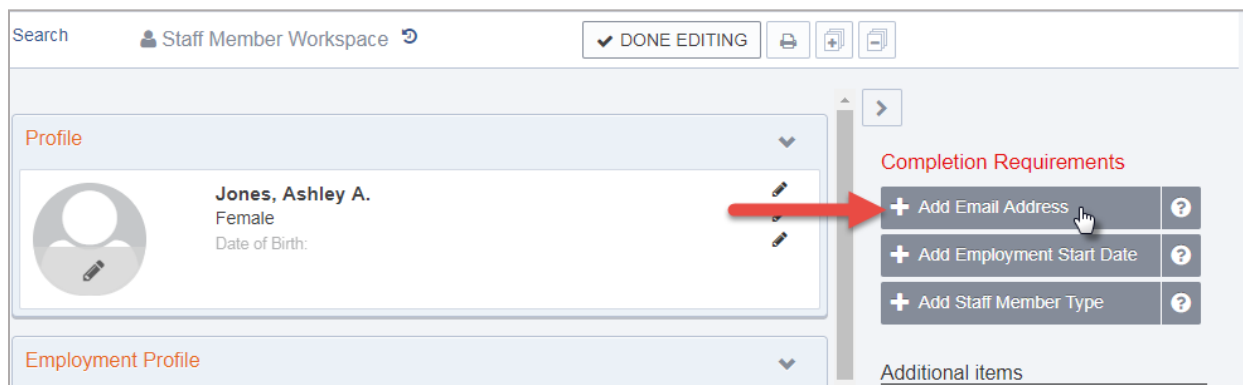
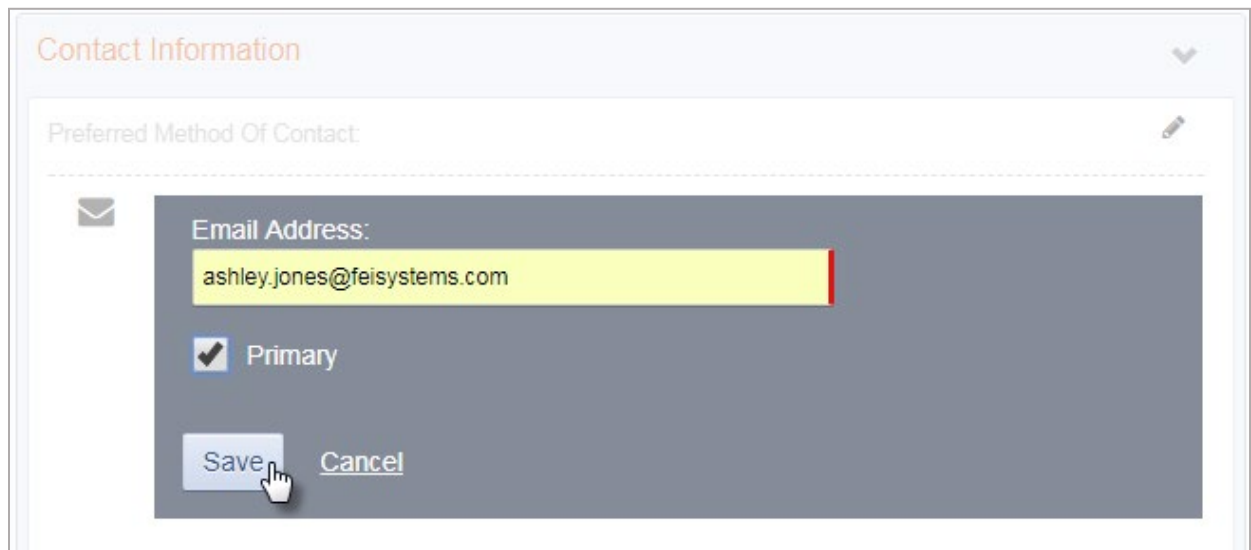


Figure 4-11: Completion Requirements, Add Employee Start Date

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



The screenshot shows a 'Contact Information' panel with a dropdown arrow in the top right. Below the title is a section labeled 'Preferred Method Of Contact:' with a pencil icon. Underneath is a list item with an envelope icon. The list item contains an 'Email Address:' label, a text input field with the value 'ashley.jones@feisystems.com', a checked 'Primary' checkbox, and 'Save' and 'Cancel' buttons. A mouse cursor is pointing at the 'Save' button.

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.

The screenshot shows the 'Staff Member Workspace' interface. On the left is a sidebar with navigation links: Profile, Employment Profile, User Account, Contact Information, Identifiers, and Domains. The main area displays the 'Contact Information' panel for 'ashley.jones@feisystems.com'. On the right, the 'Completion Requirements' sidebar is visible, containing buttons for '+ Add Employment Start Date' and '+ Add Staff Member Type'. A red arrow points from the '+ Add Employment Start Date' button to the main content area.

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.

The screenshot shows the 'Employment Profile' panel. The 'Employment Date Range' field is highlighted with a red arrow. The field contains the date '01/17/2017' and a calendar icon. The calendar is open, showing the month of January 2017. The date '17' is selected. The calendar has a table of dates from 01 to 11. Below the calendar are buttons for 'Today', 'Clear', and 'Done'.

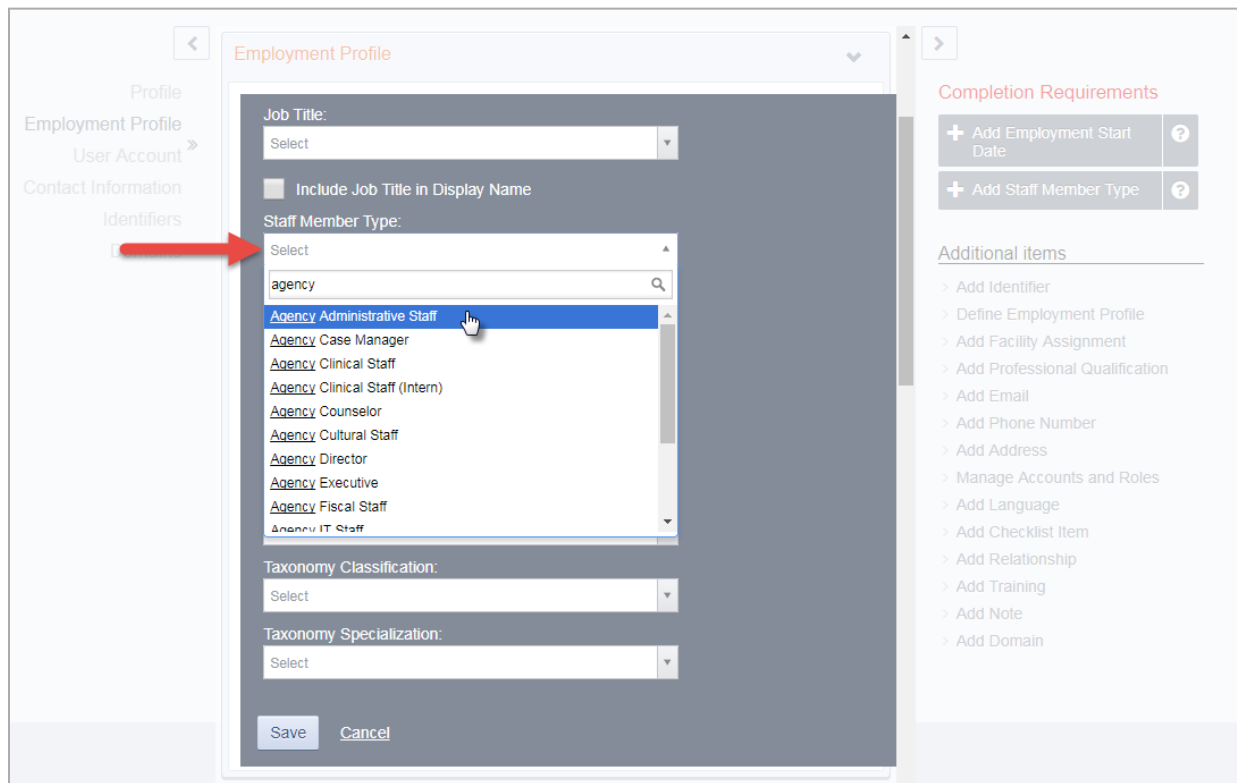
Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04
05	06	07	08	09	10	11

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



## Add Staff Member Type

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



The screenshot shows the 'Employment Profile' panel in the WITS system. On the left, a sidebar contains links for 'Profile', 'Employment Profile', 'User Account', 'Contact Information', and 'Identifiers'. The 'Employment Profile' link is selected. The main panel displays the 'Staff Member Type' field, which is a dropdown menu. A red arrow points to the dropdown menu, which is currently open, showing a list of roles including 'Agency Administrative Staff', 'Agency Case Manager', 'Agency Clinical Staff', 'Agency Clinical Staff (Intern)', 'Agency Counselor', 'Agency Cultural Staff', 'Agency Director', 'Agency Executive', 'Agency Fiscal Staff', and 'Agency IT Staff'. The 'Agency Administrative Staff' option is highlighted. Below the dropdown menu are fields for 'Job Title', 'Include Job Title in Display Name', 'Taxonomy Classification', and 'Taxonomy Specialization'. At the bottom of the panel are 'Save' and 'Cancel' buttons. On the right side of the panel, there are sections for 'Completion Requirements' (Add Employment Start Date, Add Staff Member Type) and 'Additional items' (Add Identifier, Define Employment Profile, Add Facility Assignment, Add Professional Qualification, Add Email, Add Phone Number, Add Address, Manage Accounts and Roles, Add Language, Add Checklist Item, Add Relationship, Add Training, Add Note, Add Domain).

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

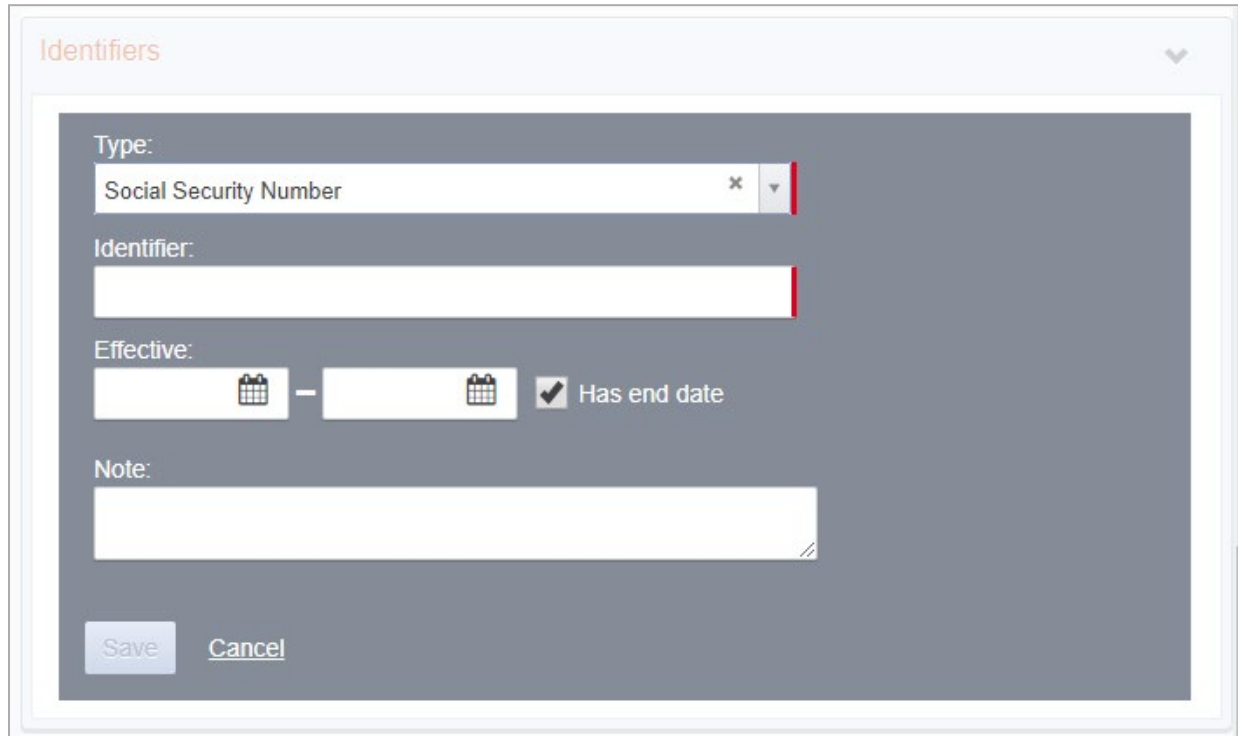
- On the Employment Profile panel, click **Save**.



**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.



The screenshot shows the 'Identifiers' panel. It contains the following fields and controls:

- Type:** A dropdown menu with 'Social Security Number' selected.
- Identifier:** A text input field.
- Effective:** Two calendar icons with a minus sign between them, and a checked checkbox labeled 'Has end date'.
- Note:** A text area for additional information.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom left.

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**.

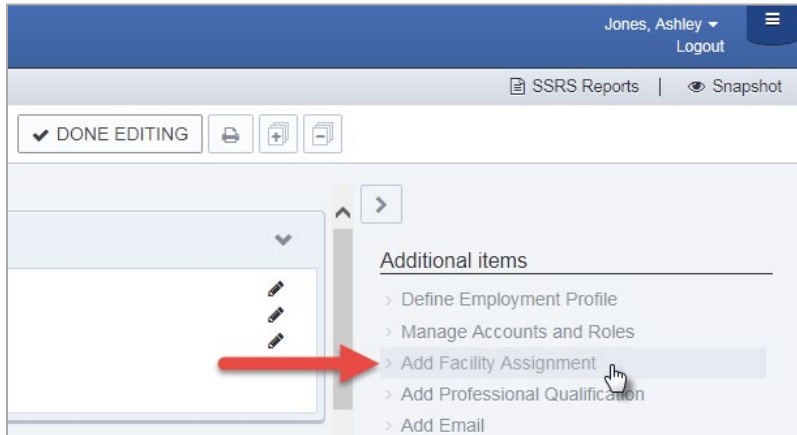


Figure 4-17: Additional Items section, Add Facility Assignment

2. In the Facility Assignments section, click on the applicable facilities.
3. Select the **Effective Date**.

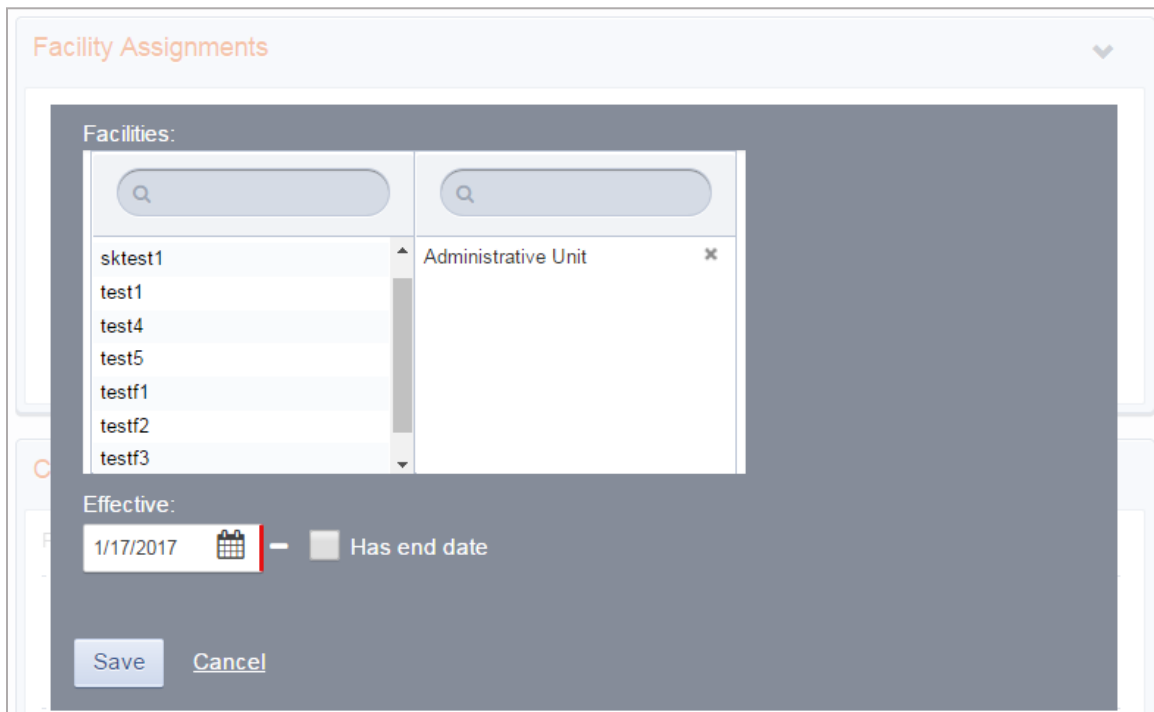


Figure 4-18: Facility Assignments panel

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.

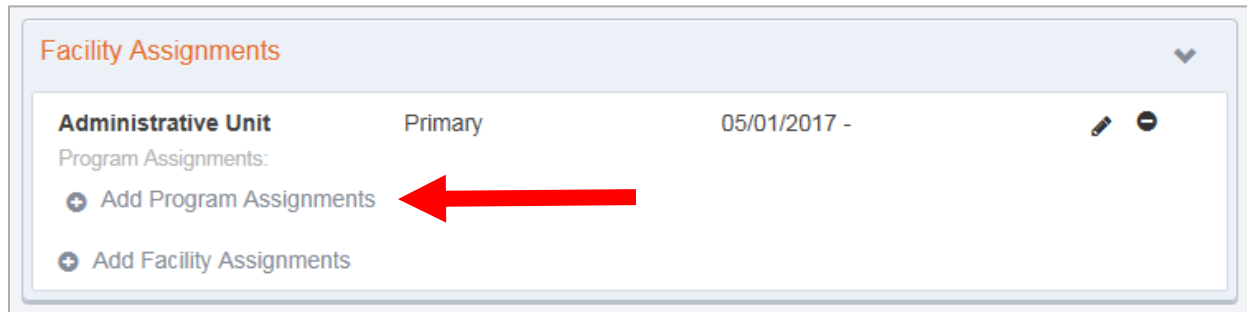
Figure 4-20: User Account panel, required fields

4. Click **Create Account**.

## Add Program Assignment (Optional)

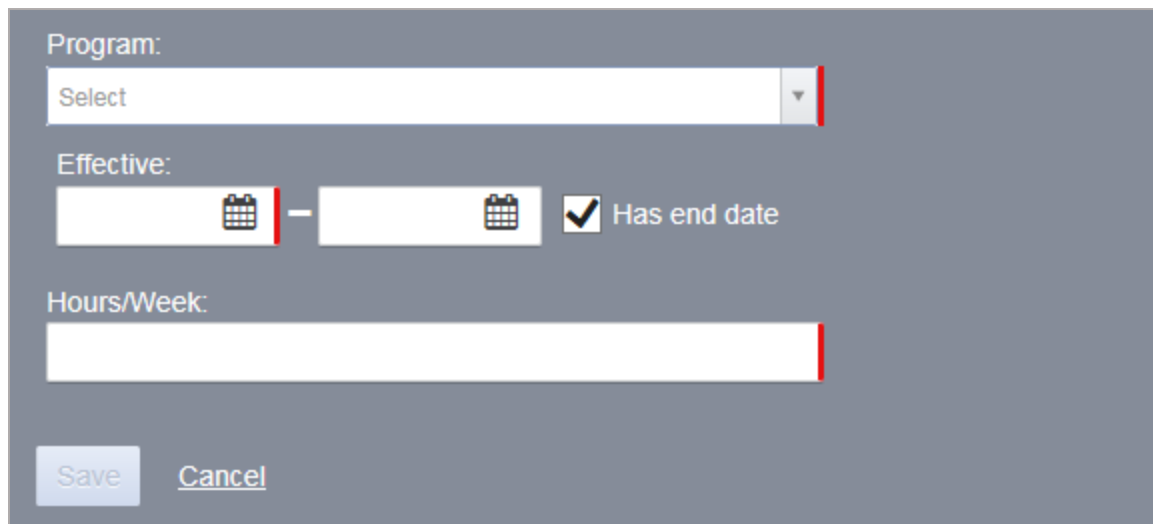
The Program Assignment option under Facility Assignments will allow a staff member to provide services to clients in that program. A staff member can be assigned to multiple programs, and program assignments must be made under each facility the staff member is assigned to.

1. Click **Add Program Assignments**.



The screenshot shows a 'Facility Assignments' window. At the top, it says 'Facility Assignments' with a dropdown arrow. Below that, there's a section for 'Administrative Unit' with the value 'Primary' and a date range '05/01/2017 -'. To the right of this are edit and delete icons. Underneath, it says 'Program Assignments:' followed by two buttons: '+ Add Program Assignments' and '+ Add Facility Assignments'. A large red arrow points directly to the '+ Add Program Assignments' button.

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**.



The screenshot shows a form for adding a program assignment. It has a 'Program:' label above a dropdown menu currently showing 'Select'. Below that is the 'Effective:' label, followed by two date input fields separated by a minus sign, and a checked checkbox labeled 'Has end date'. Underneath is the 'Hours/Week:' label above a text input field. At the bottom left are 'Save' and 'Cancel' buttons.

## 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
<b>Grant Data Entry (Full Access)</b>	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.
<b>Reports Access</b>	User with this role can access the WITS Reports from the left navigation.
<b>Overdose Reversal Kits Management (Full Access)</b>	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.
<b>Overdose Reversal Kits Management (Read-Only)</b>	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.
<b>SPARS Extraction (Full Access)</b>	The role has access to the SPARS Batch Errors screen under System Administration. <b>Note:</b> This role is included with the WITS Administrator role.
<b>View GPRA Follow Up Compliance</b>	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)

**User Account**

User ID: **staffadmin**

Enable End IP Session Lock Agency Access

Reset Credentials Release Agency Lock

System Roles:

Agency Roles: **Manage roles**

**Contact Information**

Preferred Method Of Contact:

Primary

ashley.jones@feisystems.com

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.

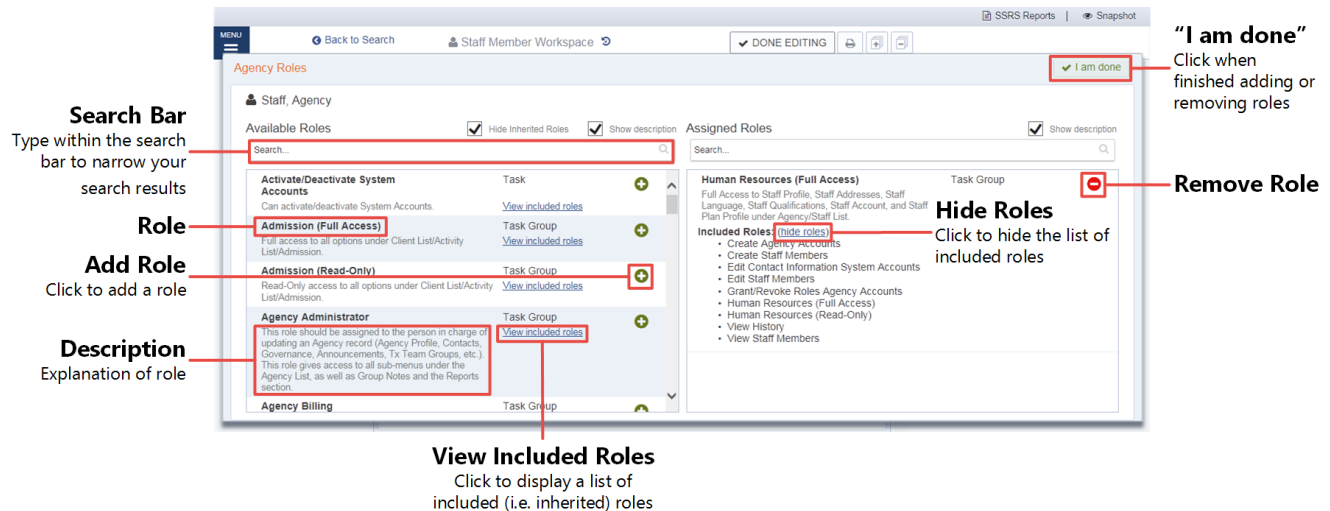
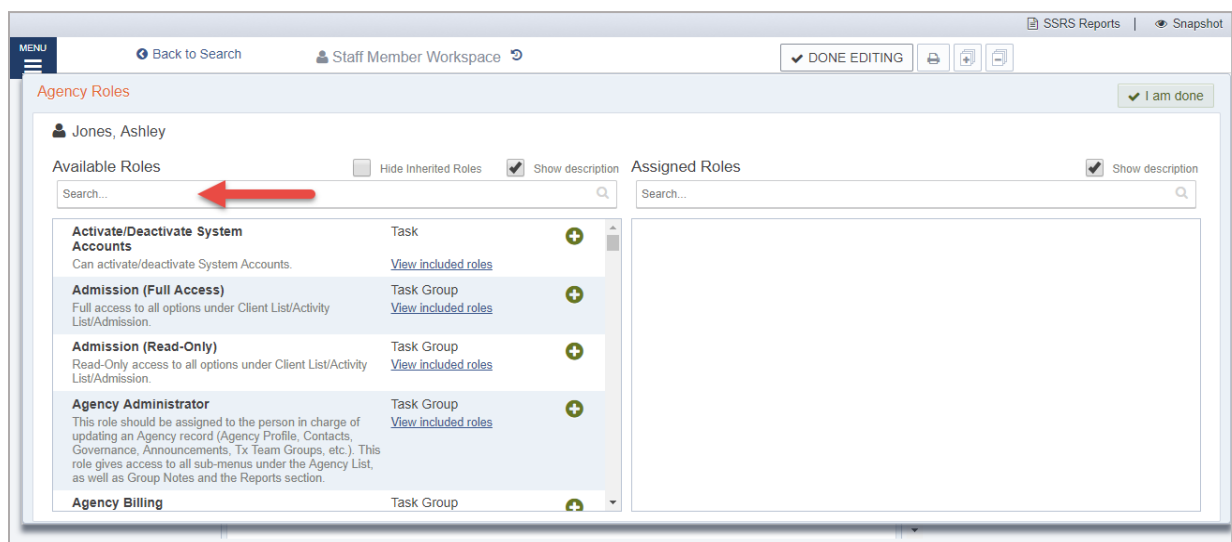


Figure 4-22: Manage Roles Screen

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.

The image shows two panels from a software interface. The top panel is titled "Professional Qualifications" and contains a form with the following fields: "Category:" with a dropdown menu showing "License"; "Type:" with a dropdown menu showing "Substance Use Disorder Counselor (SUDC)"; "Issuer Name:" with a text input field; a checked checkbox labeled "Include in Display Name"; "Effective:" with two date pickers, the first showing "5/1/2015"; and a checked checkbox labeled "Has end date". At the bottom of the form are "Save" and "Cancel" buttons. The bottom panel is titled "Profile" and shows a staff member's profile. It includes a circular placeholder for a photo, the name "Jones, Ashley, SUDC" (which is highlighted with a red box), the gender "Female", and the label "Date of Birth:" followed by a text input field. To the right of the profile information are three vertical edit icons.



## 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.

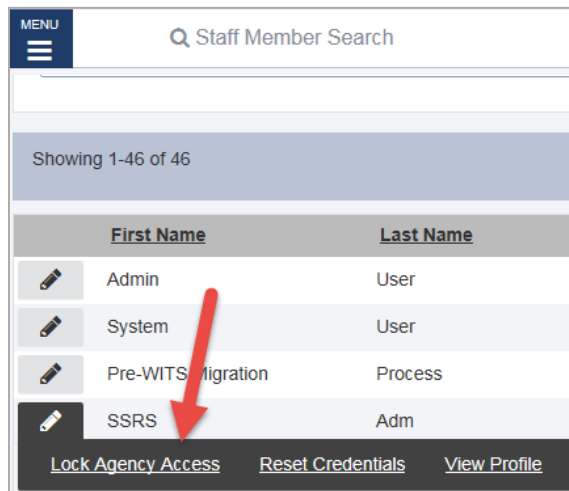
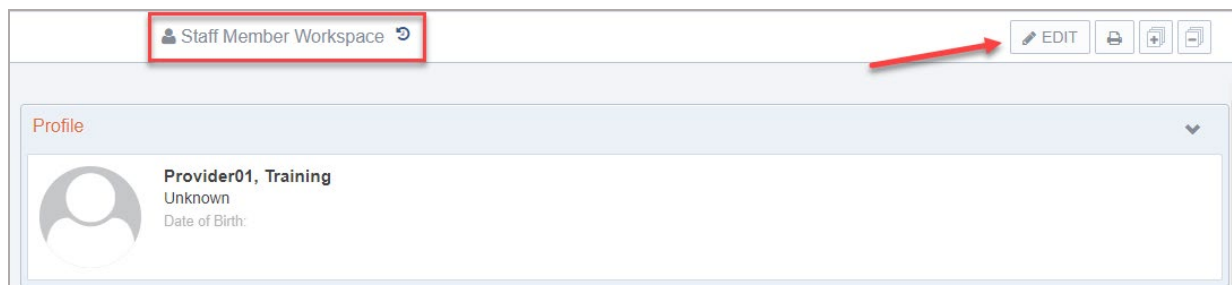


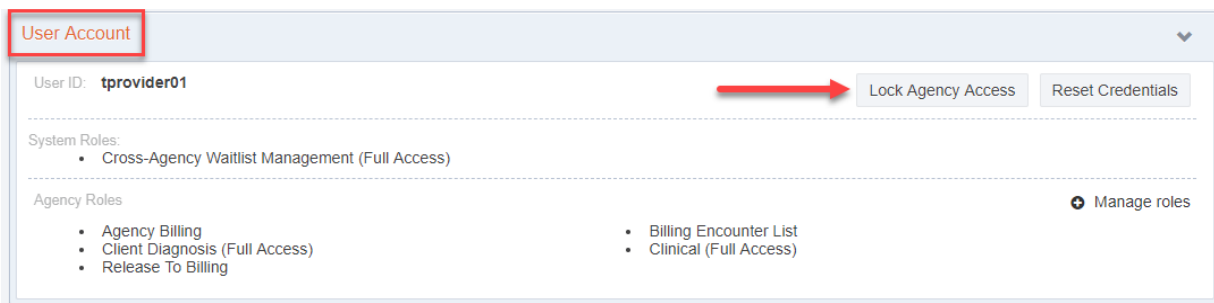
Figure 4-23: Staff Member Search Screen, Lock Agency Access

### 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**.





**User Account**

User ID: **tprovider01**

System Roles:

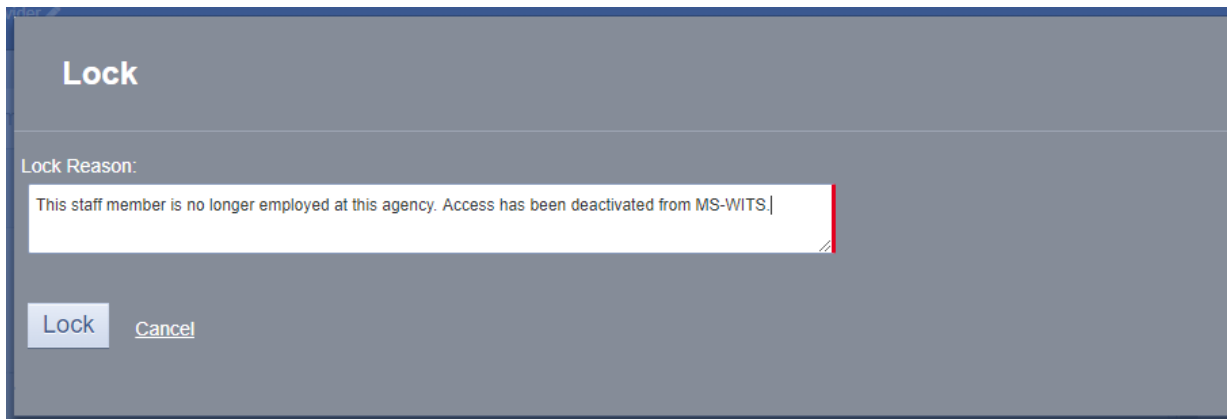
- Cross-Agency Waitlist Management (Full Access)

Agency Roles

- Agency Billing
- Client Diagnosis (Full Access)
- Release To Billing
- Billing Encounter List
- Clinical (Full Access)

[Lock Agency Access](#) [Reset Credentials](#) [Manage roles](#)

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



**Lock**

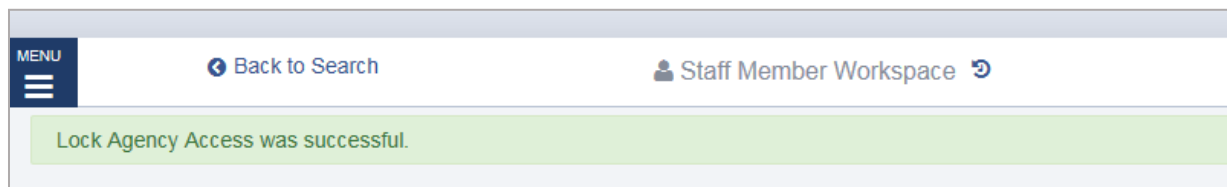
Lock Reason:

This staff member is no longer employed at this agency. Access has been deactivated from MS-WITS.

[Lock](#) [Cancel](#)

Figure 4-24: Lock Reason

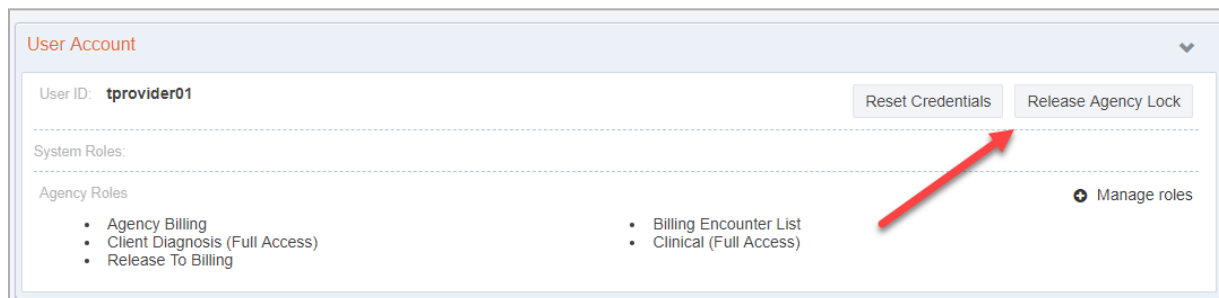
6. When you click **Lock**, the user will see the "Lock Agency Access was successful" message at the top of the workspace.



**MENU** [Back to Search](#) **Staff Member Workspace**

Lock Agency Access was successful.

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**.



**User Account**

User ID: **tprovider01**

System Roles:

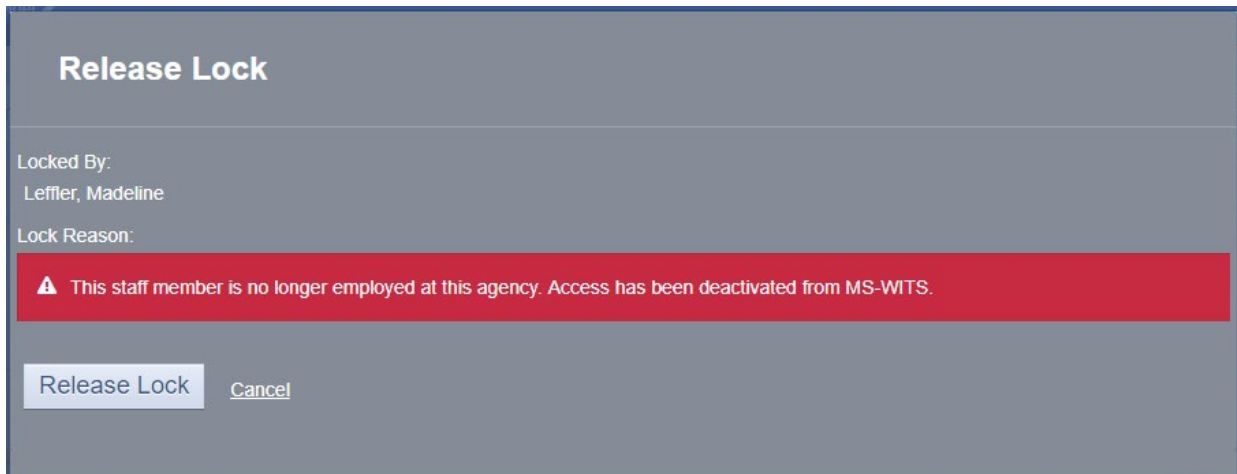
- Cross-Agency Waitlist Management (Full Access)

Agency Roles

- Agency Billing
- Client Diagnosis (Full Access)
- Release To Billing
- Billing Encounter List
- Clinical (Full Access)

[Reset Credentials](#) [Release Agency Lock](#) [Manage roles](#)

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



**Release Lock**

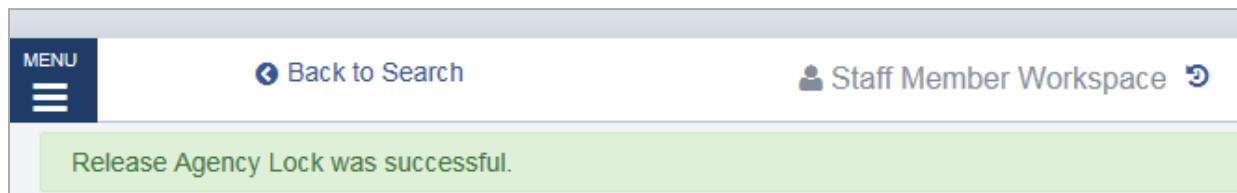
Locked By:  
Leffler, Madeline

Lock Reason:

⚠ This staff member is no longer employed at this agency. Access has been deactivated from MS-WITS.

Release Lock Cancel

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



MENU Back to Search Staff Member Workspace

Release Agency Lock was successful.

**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.



**Employment Profile**

Job Title: Administrator	Staff Member Type: Administrator Full Time Equivalent:	Employment Type: Permanent	Employment Date Range: 10/01/2016 - 10/19/2017
Taxonomy Classification: Taxonomy Specialization:	Taxonomy Type:		

✎

## 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.

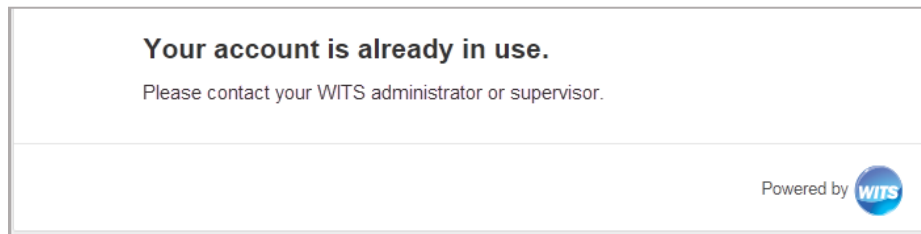


Figure 4-25: Account is already in use message

### 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**.

	Ashley	Jones	Administrative Agency	Active	ashley.jones@feisystems.com	ajones
	Madhuri	Peyyavula	Administrative Agency	Active	Madhuri.Peyyavula@feisystems.com	mpeyyavula 04/01/2015

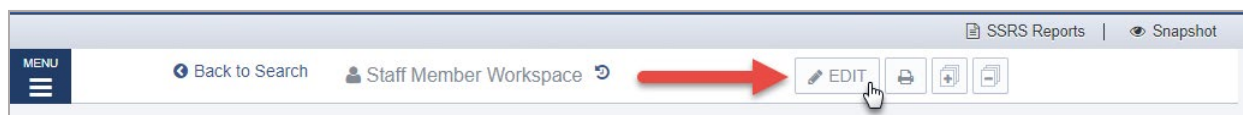
2. Ask the staff member to try logging in again.

### Option 2: Staff Member Profile

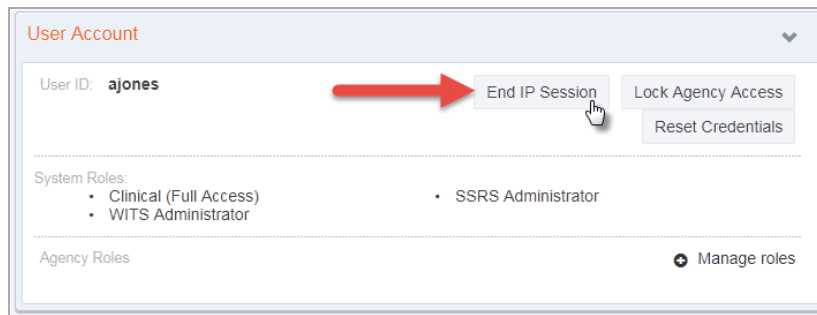
1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **View Profile**.

	Ashley	Jones	Administrative Agency	Active	ashley.jones@feisystems.com	ajones
	Madhuri	Peyyavula	Administrative Agency	Active	Madhuri.Peyyavula@feisystems.com	mpeyyavula 04/01/2015

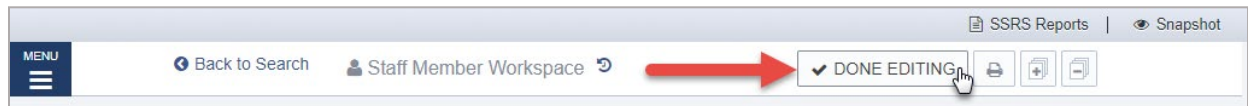
2. Click **Edit**.



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



- Click **Done Editing**.



- 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

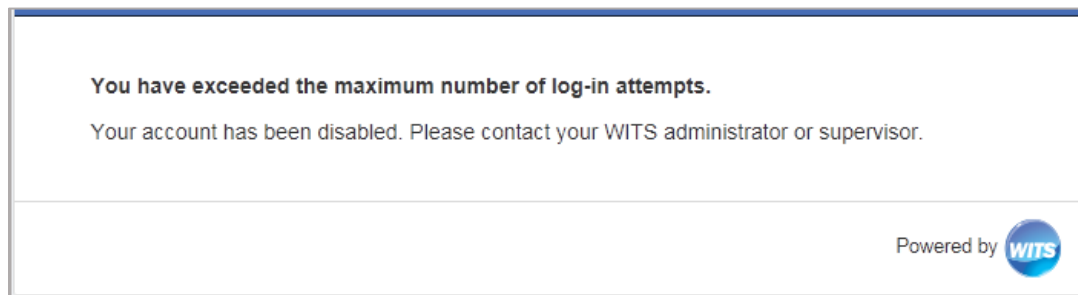
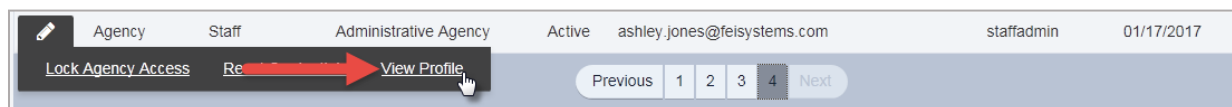


Figure 4-26: You Have Exceeded the Maximum Number of Log-in Attempts

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



- Click **Edit**.



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

User Account

User ID: **ajones\_clinical**

Enable

Lock Agency Access

Reset Credentials

System Roles:

Agency Roles

• Client Diagnosis

• Clinical (Full Access)

+

 Manage roles

## 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.

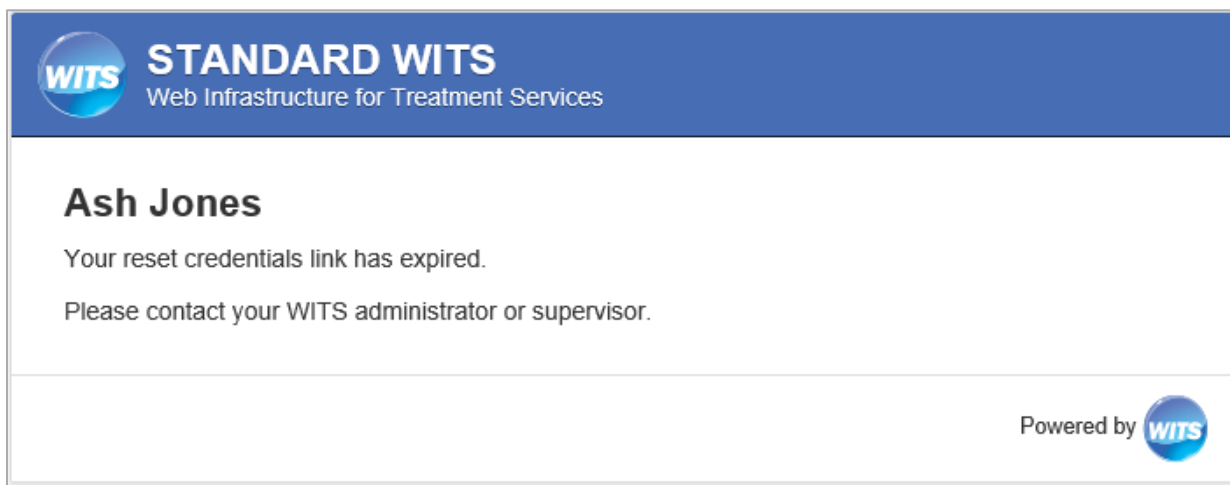
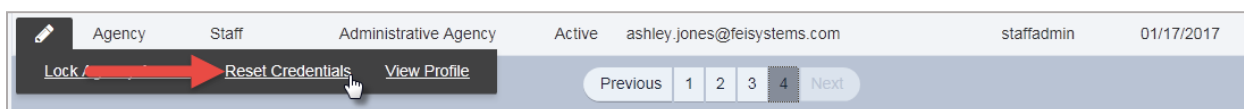


Figure 4-27: Your reset credentials link has expired

**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.

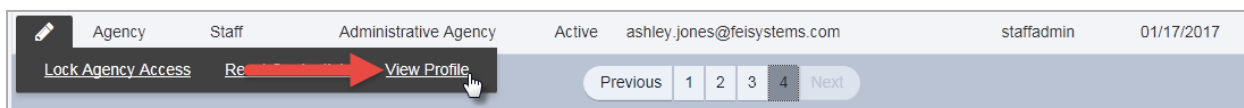
### Option 1: Staff Members List

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

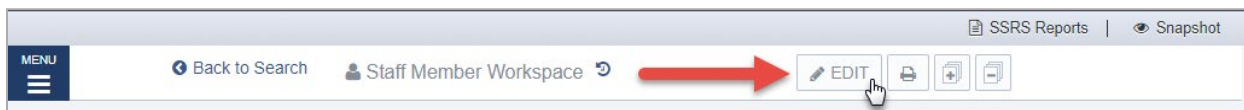


### Option 2: Staff Member Profile

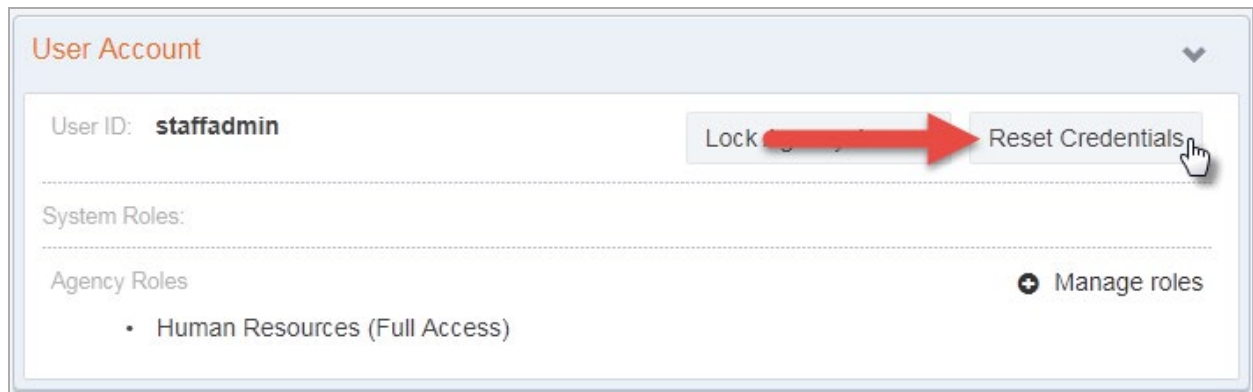
1. On the **Staff Members** list, locate the staff member, point to the pencil icon and then click **View Profile**.



2. Click **Edit**.

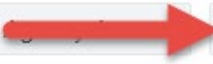


3. In the User Account panel, click **Reset Credentials**.



**User Account**


User ID: **staffadmin**

Lock  Reset Credentials

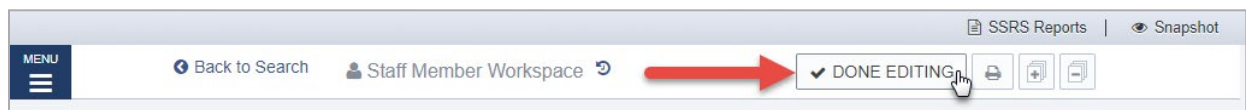
System Roles:

Agency Roles



- Human Resources (Full Access)

 Manage roles

4. Click **Done Editing**.



MENU

Back to Search Staff Member Workspace   DONE EDITING

SSRS Reports | Snapshot

## 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**.

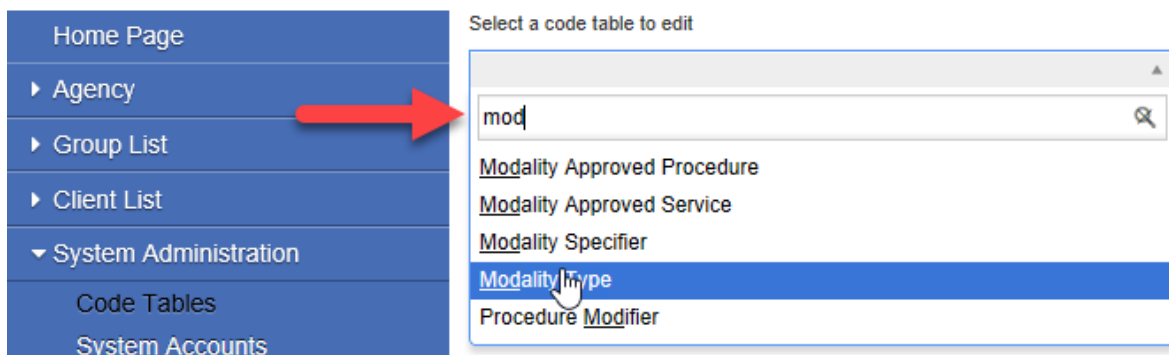


Figure 5-1: Code Tables Search screen

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

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
	MOD03	Rehabilitation/Residential-Hospital (other than detoxification)			1/23/2019		F	No	No	Substance Abuse Treatment	03	F		
	MOD04	Rehabilitation/Residential-Short Term (30 days or fewer)			1/23/2019		F	No	No	Substance Abuse Treatment	04			
	MOD05	Rehabilitation/Residential-Short Term (30 days or fewer)			1/23/2019		F	No	No	Substance Abuse Treatment	05			
	MOD06	Outpatient			1/23/2019		F	No	No	Substance Abuse Treatment	06			
	MOD07	Ambulatory- Non-Intensive Outpatient			1/23/2019		F	No	No	Substance Abuse Treatment	07			

ReviewDelete

New

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

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

Modality Type Code	<input type="text"/>
Description	<input type="text"/>
State Code	<input type="text"/>
Sort Order	<input type="text"/>
Effective Date	<input type="text"/>
Expiration Date	<input type="text"/>
Residential Modality Indicator	<input type="text"/>
Restrict Concurrent Enrollment Ind	<input type="text"/>
Admission Required	<input type="text"/>
Program Category	<input type="text"/>
TEDS Code	<input type="text"/>
Bed Management Modality Indicator	<input type="text"/>
Created By	<input type="text"/>
Created Date	<input type="text"/>
Updated By	<input type="text"/>
Updated Date	<input type="text"/>

Domains  
Substance Abuse

Selected Domains

Cancel
Save
Finish

Figure 5-3: Editing an existing Code Table Value

- 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
<b>Evidence Base Practices</b>	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.
<b>Modality Type List</b>	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 <b>Admission Required</b> field in this code table. <b>Admission Required</b> <ul style="list-style-type: none"> <li><b>No:</b> Use this value for SOR programs.</li> <li><b>Yes:</b> Used for non-SOR programs that need admission/discharge workflow to support TEDS reporting.</li> </ul>
<b>Modality Specifier</b>	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. <b>Note:</b> Values displayed in this dual list box are found in the code table named, "Cd Medication Assisted Treatment List".
<b>Medication Assisted Treatment List</b>	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.
<b>Service Location</b>	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.
<b>Referral Source</b>	Intake	Indicates the source of the referral (e.g. Self, Justice, etc.)
<b>County</b>	Agency Profile; Intake	List of the State's counties. Used to define the provider agency's county and the client's county.
<b>Procedure</b>	Services	If using encounters, this contains procedures needed to create services that are referenced on the encounter.
<b>Procedure Modifier</b>	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
<b>Sexual Orientation</b>	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
<b>Ethnicity</b>	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.
<b>Race</b>	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.
<b>Veteran Status</b>	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](#)

[New](#)

Modality Type Code	<input style="width: 100%;" type="text"/>
Description	<div style="border: 1px solid #ccc; height: 30px; background-color: #ffff00;"></div>
State Code	<input style="width: 100%;" type="text"/>
Sort Order	<input style="width: 100%;" type="text"/>
Effective Date	<input style="width: 100%;" type="text"/>
Expiration Date	<input style="width: 100%;" type="text"/>
Restrict Concurrent Enrollment Ind	<div style="border: 1px solid #ccc; width: 100px; height: 15px; background-color: #ffff00; display: flex; align-items: center; justify-content: flex-end;"><div style="width: 10px; height: 10px; border: 1px solid #ccc; background-color: #ccc;"></div></div>
Residential Modality Indicator	<div style="border: 1px solid #ccc; width: 100px; height: 15px; background-color: #ffff00; display: flex; align-items: center; justify-content: flex-end;"><div style="width: 10px; height: 10px; border: 1px solid #ccc; background-color: #ccc;"></div></div>
Bed Management Modality Indicator	<div style="border: 1px solid #ccc; width: 100px; height: 15px; background-color: #ffff00; display: flex; align-items: center; justify-content: flex-end;"><div style="width: 10px; height: 10px; border: 1px solid #ccc; background-color: #ccc;"></div></div>
GPRA Modality	<div style="border: 1px solid #ccc; width: 100px; height: 15px; background-color: #ffff00; display: flex; align-items: center; justify-content: flex-end;"><div style="width: 10px; height: 10px; border: 1px solid #ccc; background-color: #ccc;"></div></div>
TEDS Code	<input style="width: 100%;" type="text"/>
Program Category	<div style="border: 1px solid #ccc; width: 100px; height: 15px; background-color: #ffff00; display: flex; align-items: center; justify-content: flex-end;"><div style="width: 10px; height: 10px; border: 1px solid #ccc; background-color: #ccc;"></div></div>
Admission Required	<div style="border: 1px solid #ccc; width: 100px; height: 15px; background-color: #ffff00; display: flex; align-items: center; justify-content: flex-end;"><div style="width: 10px; height: 10px; border: 1px solid #ccc; background-color: #ccc;"></div></div>
Created By	<input style="width: 100%;" type="text"/>
Created Date	<input style="width: 100%;" type="text"/>
Updated By	<input style="width: 100%;" type="text"/>
Updated Date	<input style="width: 100%;" type="text"/>

Domains

Substance Abuse

>

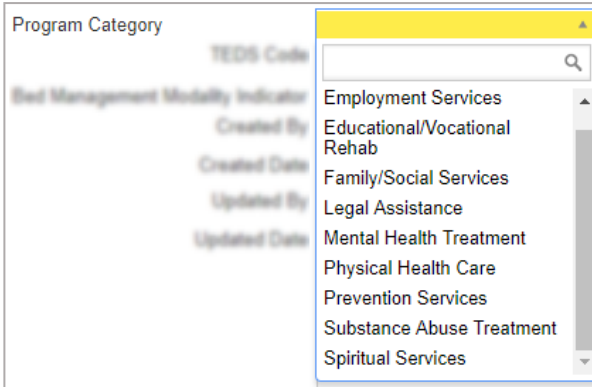
<

Selected Domains

Cancel
Save
Finish

Table 5-2: Modality Type Code Table fields

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

Field	Description
<b>Sort Order</b>	(Optional) This field is used to control how these values are listed in drop-down fields.
<b>Effective Date</b>	(Optional)
<b>Expiration Date</b>	(Optional)
<b>Restrict Concurrent Enrollment Ind.</b>	For SOR, select No.
<b>Residential Modality Indicator</b>	For SOR, select F (False).
<b>Bed Management Modality Indicator</b>	For SOR, select F (False).
<b>GPRA Modality</b>	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.
<b>TEDS Code</b>	Type the TEDS code for this Modality Type.
<b>Program Category</b>	<p>Select an option from the drop-down field.</p>  <p>The screenshot shows a dropdown menu for 'Program Category'. The menu is open, displaying a list of service categories: Employment Services, Educational/Vocational Rehab, Family/Social Services, Legal Assistance, Mental Health Treatment, Physical Health Care, Prevention Services, Substance Abuse Treatment, and Spiritual Services. The 'Program Category' label is visible at the top of the dropdown, and a search icon is present in the top right corner of the menu.</p>
<b>Admission Required</b>	For SOR, select No if you do not wish to collect TEDS data for SOR clients.
<b>Selected Domains</b>	<p>Select options from the box and use the mover buttons to add or remove the Domain options.</p> <p>For SOR, select Substance Abuse.</p>

## Code Table: Modality Specifier

WITS

Standard SOR QA

19.0.0

Provider Agency, Provider Facility

Jones, Ashley  
Logout

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H835 Management

H999 Management

H837 Management

HL7 Management

SPARS Batch

SPARS Batch Errors

System Info

Agency Oversight Assignment

Config Editor

Federal Poverty Update

Alert Types

Master Patient Index

Reports

Support Ticket

Search Criteria

Show Search

Modality Specifier List (Export)

Actions	Modality Specifier Code	Description	State Code	Sort Order	Effective Date	Expiration Date	Report To State Ind	Created By	Created Date	Updated By	Updated Date
	-101	Gambling			9/27/2018	9/27/2018					
	-102	Court Liaison-Jail Diversion			9/27/2018	9/27/2018					
	-103	Mobile Crisis Team			9/27/2018	9/27/2018					
	-104	Office of Forensic Evaluation			9/27/2018	9/27/2018					
	-105	Opioid STR			9/27/2018	9/27/2018					
	-106	CANS			9/27/2018	9/27/2018	F				
	-107	Medication-Assisted Treatment			11/27/2018			User, System	11/27/2018	User, System	11/29/2018
	-108	SOR			11/28/2018			User, System	11/28/2018	User, System	11/29/2018

New

Modality Specifier Code

Description

State Code

Sort Order

Effective Date

Expiration Date

Report To State Ind

Created By

Created Date

Updated By

Updated Date

Finish



## 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.

**A. RECORD MANAGEMENT - BEHAVIORAL HEALTH DIAGNOSES**

Please select the behavioral health diagnosis that best describes the client's condition. Classification of Diseases, 10th Revision (ICD-10-CM)

1. In the past 30 days, was the client diagnosed with an opioid use disorder? **Yes**

a. In the past 30 days, which FDA-approved medication did the client receive for the treatment of this opioid use disorder? (Select all that apply)

	Received	# of Days
Methadone	<b>Yes</b>	<b>1</b>
Buprenorphine	<b>Yes</b>	<b>1</b>
Naltrexone	<b>No</b>	
Extended-release Naltrexone	<b>Yes</b>	<b>1</b>

2. In the past 30 days, was the client diagnosed with an alcohol use disorder? **Yes**

a. In the past 30 days, which FDA-approved medication did the client receive for the treatment of this alcohol use disorder? (Select all that apply)

	Received	# of Days
Naltrexone	<b>No</b>	
Extended-release Naltrexone	<b>Yes</b>	<b>1</b>
Disulfiram	<b>No</b>	
Acamprosate	<b>No</b>	

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.

Medication Assisted Treatment Category

GPRA Medication Assisted

Created By

Created Date

Updated By

Updated Date

Acamprosate

Buprenorphine

Disulfiram

Methadone

Naltrexone

Extended-release Naltrexone

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
<b>Naltrexone - Injectable (e.g., Vivitrol®)</b>	Opioid Use Disorder (Id #2)	Extended-release Naltrexone
<b>Naltrexone - Oral</b>	Opioid Use Disorder (Id #2)	Naltrexone
<b>Buprenorphine Implant (Probuphine)</b>	Opioid Use Disorder (Id #2)	Buprenorphine
<b>Buprenorphine - Injectable (e.g., Sublocade)</b>	Opioid Use Disorder (Id #2)	Buprenorphine
<b>Buprenorphine - Oral/Sublingual/Buccal (e.g., Suboxone, buprenorphine/naloxone)</b>	Opioid Use Disorder (Id #2)	Buprenorphine
<b>Methadone</b>	Opioid Use Disorder (Id #2)	Methadone
<b>Naltrexone - Injectable (e.g., Vivitrol®)</b>	Alcohol Use Disorder (Id # 1)	Extended-release Naltrexone
<b>Naltrexone - Oral</b>	Alcohol Use Disorder (Id # 1)	Naltrexone
<b>Disulfiram</b>	Alcohol Use Disorder (Id # 1)	Disulfiram
<b>Acamprosate</b>	Alcohol Use Disorder (Id # 1)	Acamprosate

Home Page

▸ Agency

▸ Group List

▸ Client List

▾ System Administration

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System Accounts

Activity Management

Adjudication Rule Services

Rates

H835 Management

H999 Management

H837 Management

HL7Management

SPARS Batch

SPARS Batch Errors

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Alert Types

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Support Ticket

Search Criteria

Show Search

Medication Assisted Treatment List (Export)

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-release	User, System	9/12/2019 11:21 AM	User, System	10/3/2019 1:54 PM

New

ID

Description

Sort Order

Effective Date


Expiration Date

Medication Assisted Treatment Category

GPRA Medication Assisted

Created By

## Code Table: Evidence-Based Practice List


**Standard SOR QA**  
19.0.0

Provider Agency, Provider Facility

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Logout

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HL7Management
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SPARS Batch Errors
System Info
Agency Oversight Assignment
Config Editor
Federal Poverty Update
Alert Types
Master Patient Index
Reports
Support Ticket

Search Criteria

Show Search

Evidence-Based Practice List (Export)

Actions	ID	Description	Sort Order	Effective Date	Expiration Date	Created By	Created Date	Updated By	Updated Date
	-101	Not Collected	20	9/27/2018	9/27/2018				
	-100	None	10	9/27/2018					
	1	Motivational Interviewing	30	9/27/2018					
	2	Relapse Prevention	40	9/27/2018					
	3	Other	50	9/27/2018					

New

ID
Description
Sort Order
Effective Date
Expiration Date
Created By
Created Date
Updated By
Updated Date

Finish

## 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

Identifier	Display Name	Status	Email	Phone Number
dvincen	Vincent, Donna	Active	hkocvincent@hawaii.rr.com	Unknown
ALima25	Lima, Andre	Deactivated	alima@poailani.org	Unknown
adurupan	Durupan, Alexander	Active	hkoadurupan@hawaii.rr.com	Unknown
darin.miura	Miura, Darin	Active	darin@bbcoahu.org	Unknown
sfasone	Fasone, Susan	Active	sfasone@poailani.org	Unknown
jconrad	Conrad, Jennifer	Active	noreply@feisystems.com	Unknown
glucas	Glucas, Robert	Deactivated	glucas@poailani.org	Unknown
hkobnunes	Nunes, Robert	Active	hkobnunes@hawaii.rr.com	Unknown
jkaeo	Kaeko, Jen	Active	jkaeo@hawaiiintel.net	Unknown
VFonoimoana63	Fonoimoana, Victor	Deactivated	vic@bbcoahu.org	Unknown

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

	MENU	Q System Account Search
Home Page	Search Advanced Search	<input type="text" value="Search..."/>
State Waitlist		
Agency		
Group List		
Clinical Dashboard		
Client List	Showing 1-50 of 50	Previous 1 Next
System Administration	Select Columns	Select View
Code Tables		
System Accounts		
Activity Management		
Adjudication Rule		
Services		
Rates		
H835 Management		
H999 Management		
H837 Management		
HL7Management		

	Identifier	Display Name	Status	Email
	PProcess-105	Process, Pre-WITS Migration	Active	rodney.conrad@feinfo.com
	admin	User, Admin	Active	noreply@feisystems.com
	ajones	Jones, Ashley	Active	Ashley.Jones@feisystems.com
	<a href="#">End IP Session</a>	<a href="#">Lock System Access</a>	<a href="#">Reset Credentials</a>	<a href="#">View Profile</a>
	ms.clinical	Jones, Luna N.	Active	ashley.jones@feisystems.com
	tcarroll2	Account, Test	Active	tim.Carroll@feisystems.com

4. Click **Edit**.

SSRS Reports | Snapshot

Back to SearchSystem Account Workspace

EDIT

System Account

Agency Accounts »

System Account

ms.clinicalActive

Luna  
Ninetails  
Jones  
ashley.jones@feisystems.com

Roles

- Cross-Agency Waitlist Management (Full Access)

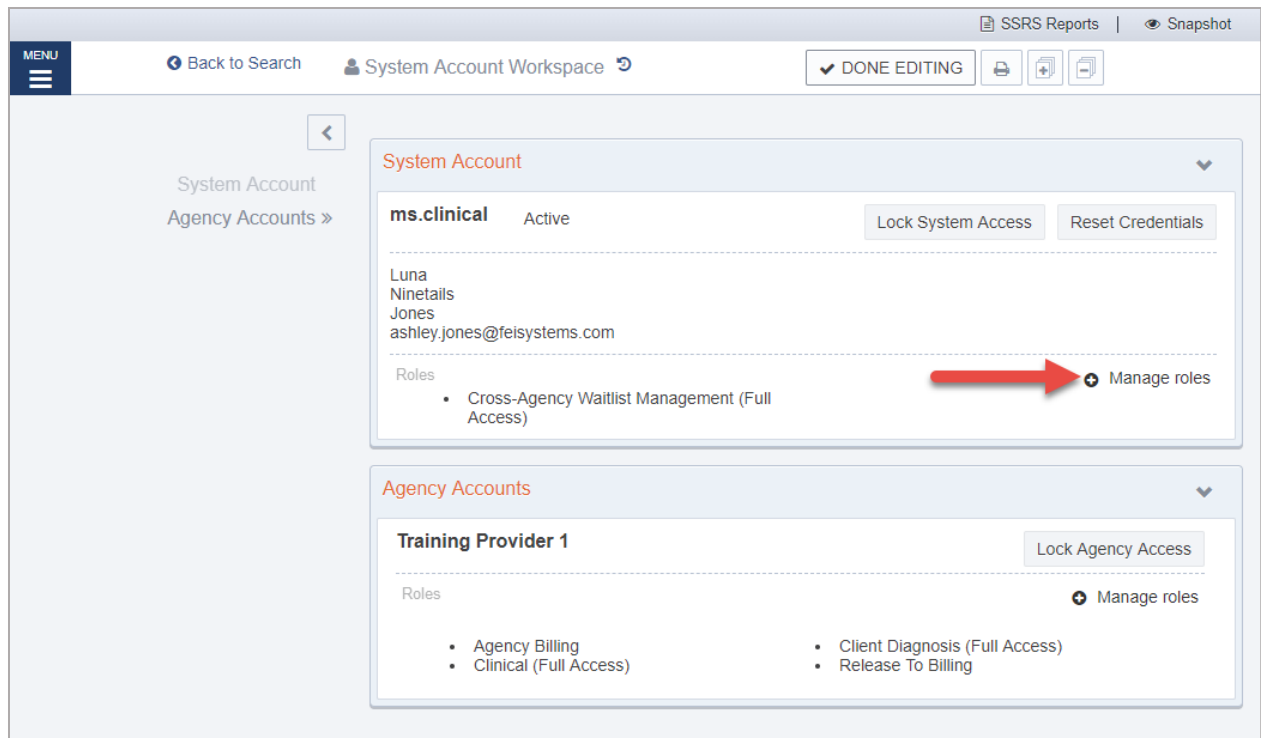
Agency Accounts

Training Provider 1

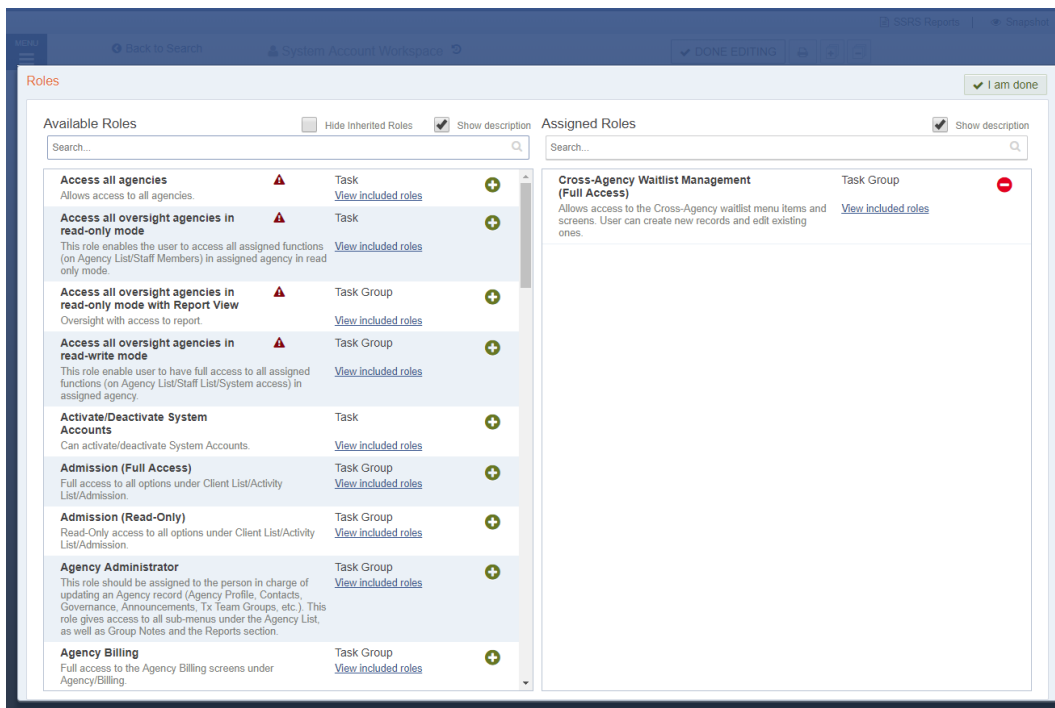
Roles

- Agency Billing
- Clinical (Full Access)
- Client Diagnosis (Full Access)
- Release To Billing

5. Click **Manage Roles**.



- Assign or remove roles as needed.



- Click **I am done**.
- 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**.

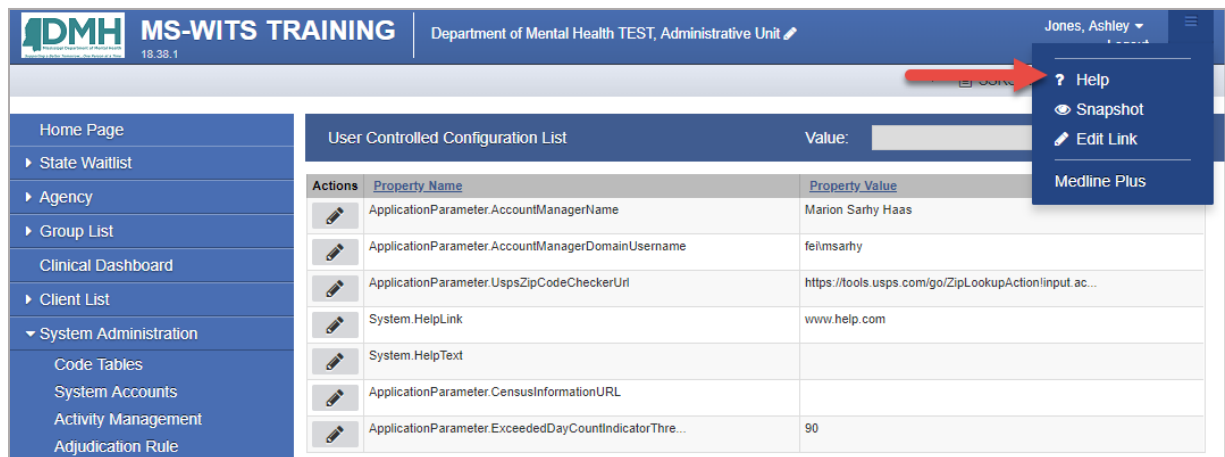
Actions	Property Name	Property Value
	ApplicationParameter.AccountManagerName	Marion Sarthy Haas
	ApplicationParameter.AccountManagerDomainUsername	felmsarhy
	ApplicationParameter.UspsZipCodeCheckerUrl	https://tools.usps.com/go/ZipLookupActionInput.ac...
	System.HelpLink	
	System.HelpText	
	ApplicationParameter.CensusInformationURL	

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

Actions	Property Name	Property Value
	ApplicationParameter.AccountManagerName	Marion Sarthy Haas
	ApplicationParameter.AccountManagerDomainUsername	felmsarhy
	ApplicationParameter.UspsZipCodeCheckerUrl	https://tools.usps.com/go/ZipLookupActionInput.ac...
	System.HelpLink	
	System.HelpText	
	ApplicationParameter.CensusInformationURL	

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.





**DMH MS-WITS TRAINING** 19.38.1 Department of Mental Health TEST, Administrative Unit Jones, Ashley

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	felmsarhy
	ApplicationParameter.UspsZipCodeCheckerUrl	https://tools.usps.com/go/ZipLookupAction!input.ac...
	System.HelpLink	www.help.com
	System.HelpText	
	ApplicationParameter.CensusInformationURL	
	ApplicationParameter.ExceededDayCountIndicatorThre...	90

Help  
Snapshot  
Edit Link  
Medline Plus

## Context Specific

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

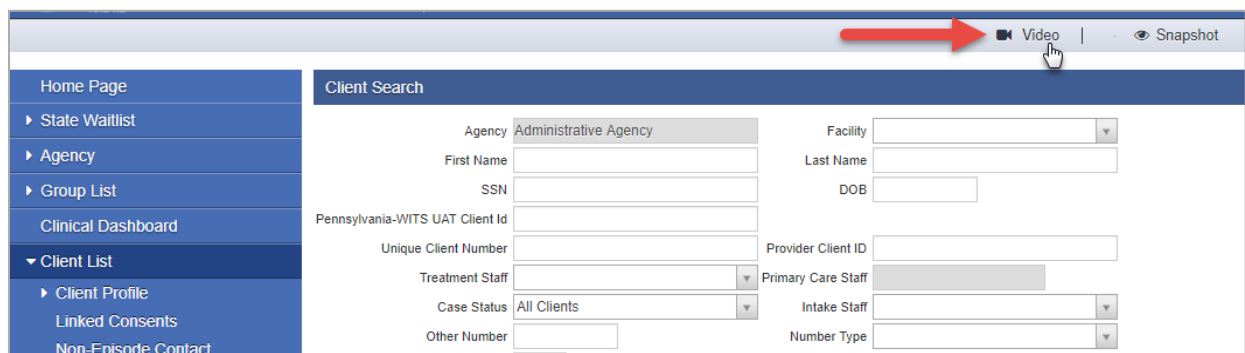
1. To enable a context specific video/help link, navigate to the desired system screen, and link the **Edit Link** in the main header. Clicking this link will open a separate window.



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

 This screenshot shows a 'Help Resource' form. It has two input fields: 'Form State' with the value 'ClientList' and 'Url' which is currently empty. A red arrow points to the 'Url' field. Below the fields are two buttons: a green 'Save' button and a blue 'Close' link.

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.

**i 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**.

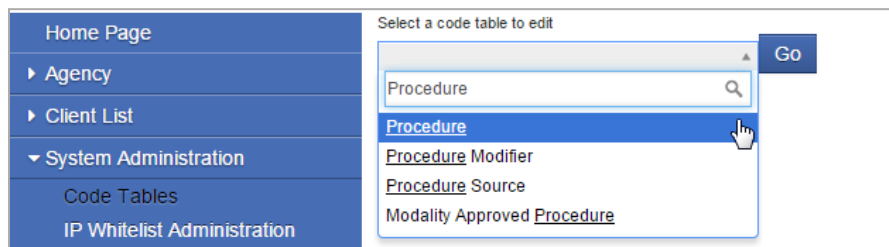


Figure 5-5: Code Tables search screen

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.

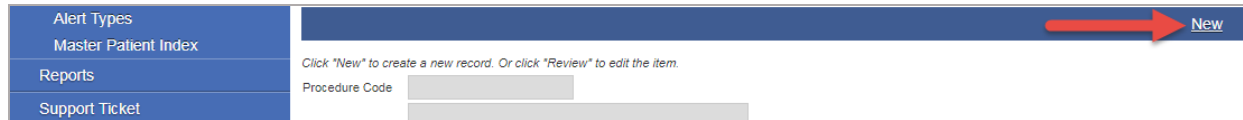
Home Page	Procedure List (Export)							
Actions	Procedure Code	Description	State Code	Sort Order	Effective Date	Expiration Date	Created Date	Procedure Source
	H0006	Alcohol And/Or Drug Services; Case Management						HCPCS
	H0007	Alcohol And/Or Drug Services; Crisis Intervention (Outpatient)						HCPCS
	H0008	Alcohol And/Or Drug Services; Sub-Acute Detoxification (Hospital Inpatient)						HCPCS
	H0009	Alcohol And/Or Drug Services; Acute Detoxification (Residential Addiction Program Inpatient)						HCPCS
	H0010	Alcohol And/Or Drug Services; Sub-Acute Detoxification (Residential Addiction Program Inpatient)						HCPCS
	H0011	Alcohol And/Or Drug Services; Acute Detoxification (Residential Addiction Program Inpatient)						HCPCS
	H0012	Alcohol And/Or Drug Services; Sub-Acute Detoxification (Residential Addiction Program Inpatient)						HCPCS
	H0013	Alcohol And/Or Drug Services; Acute Detoxification (Residential Addiction Program Inpatient)						HCPCS
	H0014	Alcohol And/Or Drug Services; Ambulatory Detoxification						HCPCS
	H0015	Alcohol And/Or Drug Services; Intensive Outpatient (Treatment Program That Operates At Least 3 Hours/Day And At Least 3 Days/Week And Is Based On An Individualized Treatment Plan). Including Assessment.						HCPCS

Click "New" to create a new record. Or click "Review" to edit the item.

Procedure Code

Figure 5-6: Procedure Code Table

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



Alert Types  
Master Patient Index  
Reports  
Support Ticket

Click "New" to create a new record. Or click "Review" to edit the item.

Procedure Code

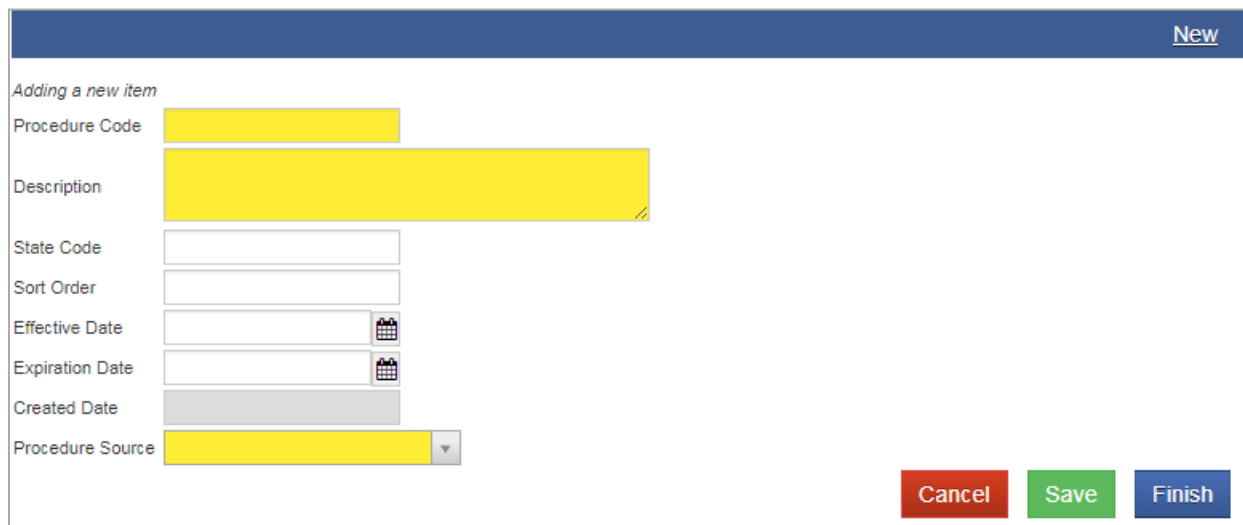
[New](#)

Figure 5-7: Procedure Code Table, New link

- 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
<b>Procedure Code</b>	Any HCPCS, CPT, or State based code that should be used to identify the services.
<b>Description</b>	Type a description of the Procedure code.
<b>State Code</b>	(Optional)
<b>Sort Oder</b>	(Optional) This field will control how the codes are ordered in a dropdown list on screen.
<b>Effective Date</b>	(Optional)
<b>Expiration Date</b>	(Optional)
<b>Procedure Source</b>	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.



[New](#)

Adding a new item

Procedure Code

Description

State Code

Sort Order

Effective Date

Expiration Date

Created Date

Procedure Source

Cancel Save Finish

Figure 5-8: Add New Procedure Code

- 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.

Home Page

► State Waitlist

► Agency

► Group List

Clinical Dashboard

► Client List

▼ System Administration

Code Tables

System Accounts

Activity Management

Adjudication Rule

Services

Rates

Service Search

Procedure Code

Service Description

Display Expired ServicesYes▼

Add-On Level▼

Start/End Time Required▼

ClearGo

Service List (Export)

Add New Service

Actions	Svc #	Service Description	Procedure	Add-On Level	Measure Type	Rend Prov Req	Allow Date Span	Start/End Time Required	Effective	Expiration

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.

**i 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
<b>Service #</b>	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.
<b>Procedure Code</b>	In the drop-down field, select from options previously entered in the "Procedure" code table.

Field	Description
<b>Description</b>	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.
<b>Modifier(s) 1, 2, 3, 4</b>	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.
<b>Measure Type</b>	Select Unit or Duration. If "Duration" is selected, this will enforce the duration fields on the Encounter screen.
<b>Rendering Provider Required</b>	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.
<b>Date Span Allowed</b>	Select Yes or No. If "Yes" is selected, an Encounter with this service will be able to start and end on different dates.
<b>Effective Date</b>	Select the earliest date providers could start using this service.
<b>Expiration Date</b>	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.
<b>Add-On Level</b>	
<b>Start/End Time Required</b>	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.
<b>Created Date</b>	Read-only field.
<b>GPRA Service</b>	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.
<b>Selected Domains</b>	Select one or more domains for this service.

The screenshot shows the 'Service Profile' configuration screen. It includes the following fields and options:

- Service #**: Text input field.
- Description**: Text input field.
- Measure Type**: Dropdown menu.
- Rendering Provider Required**: Dropdown menu with 'Yes' selected.
- Date Span Allowed**: Dropdown menu with 'Yes' selected.
- Effective Date**: Date picker.
- Expiration Date**: Date picker.
- Add-On Level**: Dropdown menu with 'None' selected.
- Start/End Time Required**: Dropdown menu with 'No' selected.
- Created Date**: Read-only text field.
- GPRA Service**: Dropdown menu.
- Procedure Code**: Dropdown menu.
- Modifier 1, 2, 3, 4**: Four separate dropdown menus.
- Domains**: List box containing 'Substance Abuse'.
- Selected Domains**: Empty list box.
- Buttons**: 'Cancel' (red), 'Save' (green), and 'Finish' (blue) at the bottom right.

Figure 5-10: Service Profile screen

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





## 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.

Actions	Id	Client Full Name	Birth Date	Gender	SSN	Medicaid Id	Unique Client #	State Client Id	Agency
[Icon]	1038	2, Deeksha Test	6/1/1987	Female	213-12-5678		200006018756780		Administrative Agency
[Icon]	1092	Ackles, Jensen	3/1/1978	Male	654-32-9874		A24203017898740		MAZZITTI AND SULLIVAN COUNSELING SERVICES INC
[Icon]	1098	Asteraceae,	8/1/1999	Female	012-34-		A23608019956780		Administrative Agency
[Icon]	1020	Bear, Boo-Boo	3/4/1958	Transgender – Unknown	030-50-1958		B60003045819580		EAGLEVILLE HOSPITAL
[Icon]	1017	Bear, Yogi	5/1/1958	Male	010-99-1958		B60005015819580		EAGLEVILLE HOSPITAL

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.

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

**WITS Standard SOR QA 19.6.0** | Administrative Agency, Administrative Unit | Jones, Ashley | Logout | Snapshot

**SPARS Batch Search**

Batch Status:  Batch Name:

Process Date:

**SPARS Batch Listing (Export)** [Start ATR SPARS Batch](#) [Start Services SPARS Batch](#)

Actions	Batch #	Status	Type	Record Count	Process Date	Response Date	Batch Name
	1	Uploaded	SERVICES	1	7/24/2019 12:14:29 PM		SERV_WY_904_20190724121429_SERVICES_1.xml
	2	Uploaded	SERVICES	1	7/29/2019 3:33:32 PM		SERV_WY_904_20190729153332_SERVICES_1.xml
	3	Uploaded	SERVICES	1	7/30/2019 9:10:07 AM		SERV_WY_904_20190730091007_SERVICES_1.xml
	4	Accepted	SERVICES	1	7/30/2019 3:25:00 PM	7/30/2019 3:30:21 PM	SERV_WY_904_20190730152500_SERVICES_1.xml

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

Home Page

- Agency
- Group List
- Client List
- System Administration
  - Code Tables
  - System Accounts
  - Activity Management
  - Adjudication Rule
  - Services
  - Rates
  - H835 Management
  - H999 Management
  - H837 Management
  - HL7 Management
  - SPARS Batch
  - SPARS Batch Errors

SPARS Batch Search

Batch Status:  Batch Name:

Process Date:

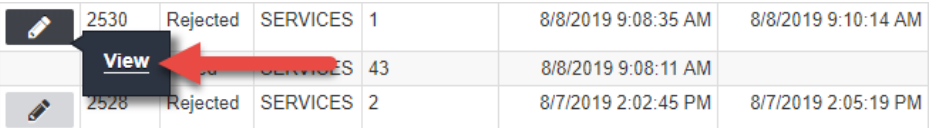
SPARS Batch Listing (Export)

Actions	Batch #	Status	Type	Record Count	Process Date	Response Date	Batch Name
	1	Uploaded	SERVICES	1	7/24/2019 12:14:29 PM		SERV_WY_904_20190724121429_SERVICES_1.xml
	2	Uploaded	SERVICES	1	7/29/2019 3:33:32 PM		SERV_WY_904_20190729153332_SERVICES_1.xml
	3	Uploaded	SERVICES	1	7/30/2019 9:10:07 AM		SERV_WY_904_20190730091007_SERVICES_1.xml
	4	Accepted	SERVICES	1	7/30/2019 3:25:00 PM	7/30/2019 3:30:21 PM	SERV_WY_904_20190730152500_SERVICES_1.xml
	5	Started	SERVICES	2	8/12/2019 11:36:56 AM		SERV_WY_904_20190812113656_SERVICES_1.xml

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

**SPARS Batch Errors Listing (Export)**

Actions	Batch #	Current Record Status	Agency	Grant	SAIS Client ID	Unique Client #	Interview Type	Interview Date	Error Code	Error Message
	2530	Rejected	Grant Management Only	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	ActiveIntakeNotExist	There is no related active Intake interview in data
	2530	Rejected	Grant Management Only	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	FamilyandLivingRule12	When Section A is not provided, system can NOT find an active intake record that can provide gender information.
	2530	Rejected	Grant Management Only	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	FamilyandLivingRule5	Since client is not male, pregnant question should be "Not Applicable".
	2530	Rejected	Grant Management Only	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	DataServiceError	General data service error: Cannot insert the value NULL into column 'ClientIntakeID', table 'Spars.Csat.Database.Development.dbo.tblDISCIntrvw'; column does not allow nulls. INSERT fails. The statement has been terminated. at [RecordSeqNo]=6475 .

Figure 5-17: SPARS Batch Errors, Export list

	Grant	SAIS Client ID	Unique Client #	Interview Type	Interview Date	Error Code	Error Message
1	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	ActiveIntakeNotExist	There is no related active Intake interview in database.
2	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	FamilyandLivingRule12	When Section A is not provided, system can NOT find an active intake record that can provide gender information.
3	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	FamilyandLivingRule5	Since client is not male, pregnant question should be "Not Applicable".
4	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	DataServiceError	General data service error: Cannot insert the value NULL into column 'ClientIntakeID', table 'Spars.Csat.Database.Development.dbo.tblDISCIntrvw'; column does not allow nulls. INSERT fails. The statement has been terminated. at [RecordSeqNo]=6475 .

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**.

WITS

Standard SOR QA

19.6.0

Administrative Agency, Administrative Unit

Jones, Ashley  
Logout

Snapshot

Home Page

Agency

Group List

Client List

System Administration

Code Tables

IP Whitelist Administration

System Accounts

Activity Management

Adjudication Rule

Services

HL7 Management

SPARS Batch

SPARS Batch Errors

System Info

Agency Oversight Assignment

Config Editor

Alert Types

Master Patient Index

Reports

SPARS Batch Errors Search

Current Record Status: Rejected

Batch Number: 2530

Interview Date:

Agency:

Client Number:

Clear

Go

SPARS Batch Errors Listing (Export)

Actions	Batch #	Current Record Status	Agency	Grant	SAIS Client ID	Unique Client #	Interview Type	Interview Date	Error Code	Error Message
	2530	Rejected	Grant Management Only	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	ActiveIntakeNotExist	There is no related active Intake interview in data
	2530	Rejected	Grant Management Only	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	FamilyandLivingRule12	When Section A is not provided, system can NOT an active intake record that can provide gender information.
	2530	Rejected	Grant Management Only	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	FamilyandLivingRule5	Since client is not male, pregnant question should be "Not Applicable".
	2530	Rejected	Grant Management Only	TI081723	3640512993	9206178559	6-Month Follow Up	7/10/2019	DataServiceError	General data service error: Cannot insert the value NULL into column 'ClientIntakeID'; table 'Spars.Coat Database.Development.dbo.tbDISC' column does not allow nulls. INSERT fails. The

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.

The screenshot shows the WITS Standard SOR QA interface. The top header includes the WITS logo, version 19.6.0, and the text 'Standard SOR QA'. On the right, it shows the user 'Jones, Ashley' with a 'Logout' button. Below the header, there's a search bar for 'Report Title Contains:' with a 'Go' button. The left sidebar contains a menu with options: Home Page, Agency, Group List, Client List, System Administration, Reports (selected), and Support Ticket. The main content area is titled 'Report Catalog' and lists various reports grouped by category:

- Access**
  - [Agency Client Movement](#)
  - [Program Client Movement](#)
  - [Referrals in by Agency](#)
  - [Referrals out by Agency](#)
- QA/QC**
  - [Program Enrollment Counts](#)
  - [Client List by Program](#)
  - [Agency/Facility Client Terminations](#)
  - [Unfinished Client Activities](#)
- Miscellaneous**
  - [Client Profile Data](#)
  - [Combined Note Data](#)
  - [WITS Data Dictionary](#)
  - [Encounter Data](#)
  - [GPRA Interview Data](#) (highlighted with a red box and arrow)
- Security**
  - [Staff Role Assignment](#)

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.

source_record_id	source_provider	grant_no	client_no	interview_type	interview_date
1	Substance Abuse	SORGrantNo	Q674449PG474645	1	12/3/2018
7	Administrative Agency	SORGrantNo	Q534445JG434655	1	11/19/2018
3	Administrative Agency	SORGrantNo	J693806KE973545	1	2/1/2019
2	Administrative Agency	SORGrantNo	Q694445PG494645	1	12/5/2018
11	Administrative Agency	SORGrantNo	F159102FC718121	1	6/27/2019
12	Administrative Agency	SORGrantNo	F159102FC718121	2	7/1/1869
13	Administrative Agency	SORGrantNo	F159102FC718121	5	7/1/1869
14	Administrative Agency	SORGrantNo	F159102FC718121	4	7/1/1869
15	Administrative Agency	SORGrantNo	F159102FC718121	4	7/1/1869
19	Administrative Agency	SORGrantNo	J153986LW953554	1	7/31/2018
20	Administrative Agency	SORGrantNo	J153986LW953554	2	7/1/1869
21	Administrative Agency	SORGrantNo	J153986LW953554	5	7/1/1869

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.

The screenshot shows the WITS Standard SOR QA interface. The top navigation bar includes the WITS logo, version 19.6.0, and the user 'Jones, Ashley' with a 'Logout' button. The main content area is titled 'GPRA Interview Data'. A red arrow points to the 'Export' button in the left sidebar. Below the 'Export' button, there is a 'Report Criteria' section with a dropdown menu set to 'Grant: SOR'. A table of data is displayed below the criteria section.

source_record_id	source_provider	grant_no	client_no	interview_type	interview_date
1	Substance Abuse	SORGrantNo	Q674449PG474645	1	12/3/2018

This screenshot shows the 'GPRA Interview Data' table with three rows of data. A red arrow points to the 'Export' button in the left sidebar. The table has the same columns as the previous screenshot.

source_record_id	source_provider	grant_no	client_no	interview_type	interview_date
1	Substance Abuse	SORGrantNo	Q674449PG474645	1	12/3/2018
7	Administrative Agency	SORGrantNo	Q534445JG434655	1	11/19/2018
3	Administrative Agency	SORGrantNo	J693806KE973545	1	2/1/2019

This screenshot shows the Excel file 'GPRAInterview\_20190731.xls' opened in Microsoft Excel. The file contains the same data as the 'GPRA Interview Data' table in the WITS interface. The data is organized into columns labeled A through O, with the first column (A) containing the 'source\_record\_id' values.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	source_rec_id	grant_i	source_pr	source_pr	grant_no	client_no	interview	client_type	interview	FFY	FFQ	diagnosis	diagnosis	diagnosis
2	1	-108	2	Substance	SORGrantNo	Q674449P	1	1	#####	2019	1	'-1	'-1	'-1
3	7	-108	1	Administra	SORGrantNo	Q534445J	1	1	#####	2019	1	'-1	'-1	'-1
4	3	-108	1	Administra	SORGrantNo	J693806KE	1	1	2/1/2019	2019	2	'-1	'-1	'-1
5	2	-108	1	Administra	SORGrantNo	Q694445P	1	1	#####	2019	1	'-1	'-1	'-1
6	11	-108	1	Administra	SORGrantNo	F159102FC	1	1	#####	2019	3	'-8	'-1	'-1
7	12	-108	1	Administra	SORGrantNo	F159102FC	2	1	7/1/1869	2019	3	'-1	'-1	'-1
8	13	-108	1	Administra	SORGrantNo	F159102FC	5	1	7/1/1869	2019	3	'-1	'-1	'-1
9	14	-108	1	Administra	SORGrantNo	F159102FC	4	1	7/1/1869	2019	3	'-1	'-1	'-1
10	15	-108	1	Administra	SORGrantNo	F159102FC	4	1	7/1/1869	2019	3	'-1	'-1	'-1
11	19	-108	1	Administra	SORGrantNo	J153986LV	1	1	#####	2018	4	'-1	'-1	'-1
12	20	-108	1	Administra	SORGrantNo	J153986LV	2	1	7/1/1869	2019	4	'-1	'-1	'-1
13	21	-108	1	Administra	SORGrantNo	J153986LV	5	1	7/1/1869	2019	4	'-1	'-1	'-1
14	25	-108	1	Administra	SORGrantNo	J113097KE	1	1	#####	2019	1	'-1	'-1	'-1
15	9	-108	1	Administra	SORGrantNo	Q534445J	2	1	#####	2019	1	'-1	'-1	'-1
16	10	-108	1	Administra	SORGrantNo	Q534445J	5	1	#####	2019	1	'-1	'-1	'-1

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

STANDARDSOR WITS

ajones

★ Favorites
Browse

Home > FEI > Reports > StateOpioidResponse > SOR Program Report

Funding Type

SOR

Begin Date

1/1/2019

EndDate

4/1/2019

View Report

1 of 1
100%

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

Naloxone Overdose Reversal Kit Distribution and Utilization

1	Has your state/territory/tribal entity used SOR/TOR funds to expand the availability, distribution, and use of naloxone overdose reversal kits (Narcan, Evzio, and others)? Yes
1a	If “Yes,” how many naloxone overdose reversal kits have been purchased (funded) wholly or in part since the last reporting period with SOR/TOR funds?  523 kits
1b	If “Yes,” how many naloxone overdose reversal kits funded wholly or in part by SOR/TOR funds have been distributed since the last reporting period?  240 kits

## 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

Florida-WITS Training

ajones

★ Favorites
Browse

Home > FEI > Reports > Gpra > Grant Episode Details

Grant Type: SOR
Unique Client Number: Q923166MJ661544
View Report

1 of 1
100%
Find | Next

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

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