



FEI Systems



State Opioid Response (SOR) Grant 2

*Standard SOR WITS
Administrator User
Guide*

Applies to:

WITS Version 20.6.1

WITS Customers

Last Updated November 2020

Version 5

Error! Reference source not found.

State Opioid Response (SOR) Grant 2

Preface

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

Intended Audience

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

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

System Requirements

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

Internet Browsers

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

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

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

Pop-up Blocker

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

Customer URL Links

Training Site: Click or tap here to enter text.

Production Site: Click or tap here to enter text.

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.***

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

Documentation Updates

Version 5 (WITS 20.6.1)

The following topics have been added in this documentation version.

- **SOR II Grant Updates** (Page 1)

Version 4 (WITS 19.9.0)

The following topics have been added in this documentation version.

- **Alerts** (Part 2: Agency Administration on page 20)
- **Prepopulate Behavioral Health Diagnoses screen with Medications from Encounter** (Part 5: Code Table Reference (SOR Grant) on page 70 and on page 76)
- **View GPRA Follow Up Compliance Role** (Part 4: Staff Management on page 58)
- **GPRA Interview Compliance Details** (Part 1: State Opioid Response (SOR) in WITS on page 7)
 - 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 13)

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 90)
- 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 3)
- **Grant Episode Concepts** (Part 1: State Opioid Response (SOR) in WITS on page 5)
- **SPARS Upload** (Part 5: System Administration on page 93)
- **WITS Reports Module** (Part 6: Reports on page 97)
 - GPRA Interview Report
- **SSRS Reports** (Part 6: Reports on page 100)
 - 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

SOR II Grant Updates

SAMHSA has awarded SOR II grants to states with an effective period of 09/30/2020 – 09/29/2022. A new “SOR II” grant option has been added to WITS when creating a new Program.

Customers with SOR I and SOR II Funding

SOR I Clients Being Moved to SOR II

Several states have received No Cost Extensions for the SOR I Grant. It is up to the state to determine the criteria for clients that will continue to receive services through SOR I funding. The client may remain enrolled in the SOR I program in WITS and continue to receive services under this enrollment.

States will determine which clients are receiving SOR I funding that will be moved to SOR II funding. To move a client to SOR II funding, the client should first be disenrolled from the SOR I program (the program name will likely just contain “SOR”). A new program enrollment should then be opened for the client under the SOR II program.

Concurrent Enrollments

States will determine which clients are to receive funding from both SOR I and SOR II grants. For these clients, the existing Program Enrollment and Grant Episode for SOR I will remain active for the client. A second Program Enrollment and Grant Episode will need to be added for the client:

1. Enroll the client in a new SOR II Client Program Enrollment.
 - a. This will create a new grant episode for this client for SOR II.
2. Create a new GPRA Intake for the client’s SOR II CPE.
3. GPRA compliance requirements must be followed for both grants.

WITS will allow for the client’s CPEs for each grant to be active concurrently.

Standard SOR QA | Administrative Agency, Administrative Unit | Webb, David | Logout

Enrollments, SorConcurrent | Q413493RI203545 | 1 | SSRS Reports | Snapshot

Program Enrollment

Program Name: Facility:

Modality:

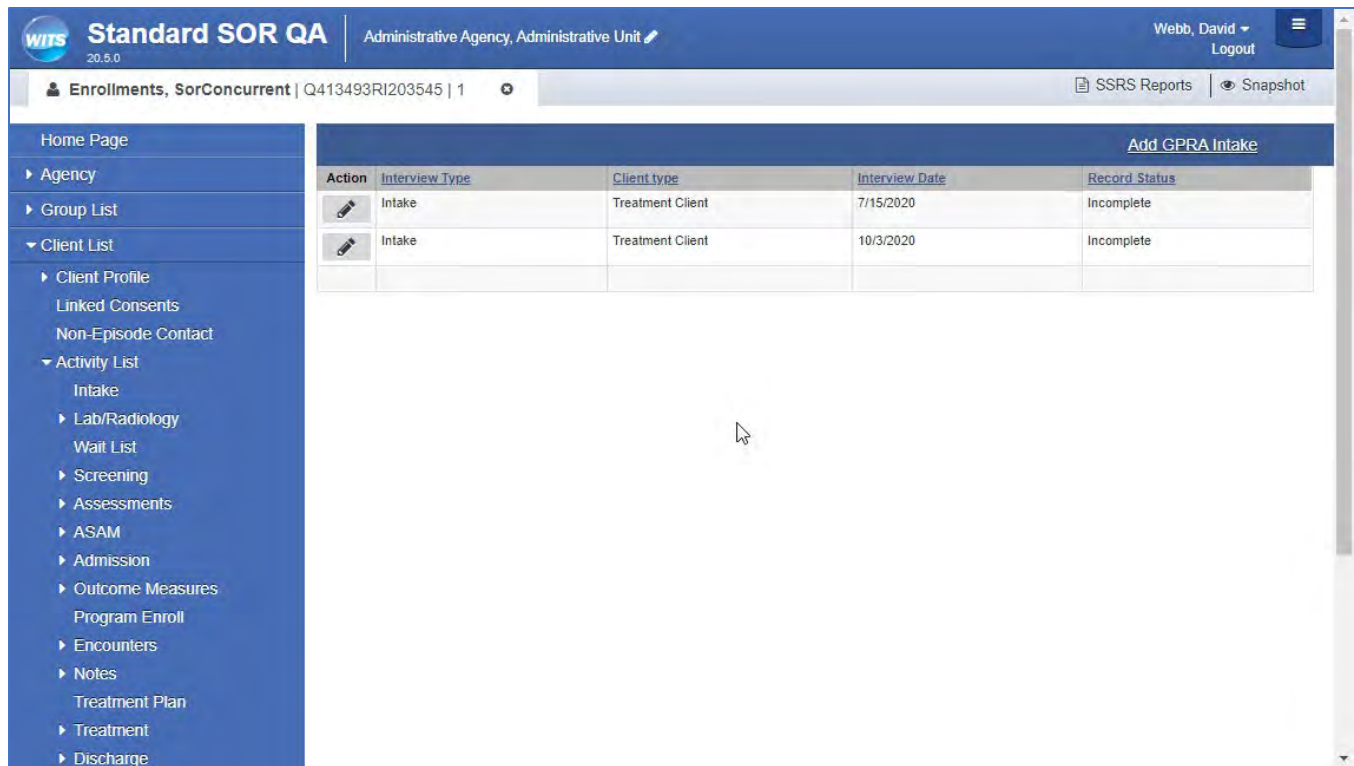
Active Program Enrollments During Date Range: From: To:

Clear Go

Program Enrollment List | Add Enrollment

Actions	Program Name	Start Date	End Date	Facility	Notes
	SOR I - MAT	7/15/2020		Administrative Unit	
	SOR II	10/3/2020		Administrative Unit	

Finish



The screenshot displays the WITS Standard SOR QA interface. The top navigation bar includes the WITS logo, version 20.5.0, and the title "Standard SOR QA". The user is logged in as "Webb, David" with a "Logout" link. The main content area shows a table of client intake records. The table has five columns: "Action", "Interview Type", "Client type", "Interview Date", and "Record Status". There are two rows of data, both showing "Intake" for "Treatment Client" with "Incomplete" status. The first row has an interview date of 7/15/2020, and the second row has an interview date of 10/3/2020. A sidebar on the left contains a menu with options like "Home Page", "Agency", "Group List", "Client List", "Client Profile", "Linked Consents", "Non-Episode Contact", "Activity List", "Intake", "Lab/Radiology", "Wait List", "Screening", "Assessments", "ASAM", "Admission", "Outcome Measures", "Program Enroll", "Encounters", "Notes", "Treatment Plan", "Treatment", and "Discharge".

Action	Interview Type	Client type	Interview Date	Record Status
	Intake	Treatment Client	7/15/2020	Incomplete
	Intake	Treatment Client	10/3/2020	Incomplete

New SOR II Clients

For any clients that will be receiving services under SOR II funding, those clients should be enrolled in a SOR II program.

Standard SOR Process Workflow Diagram

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

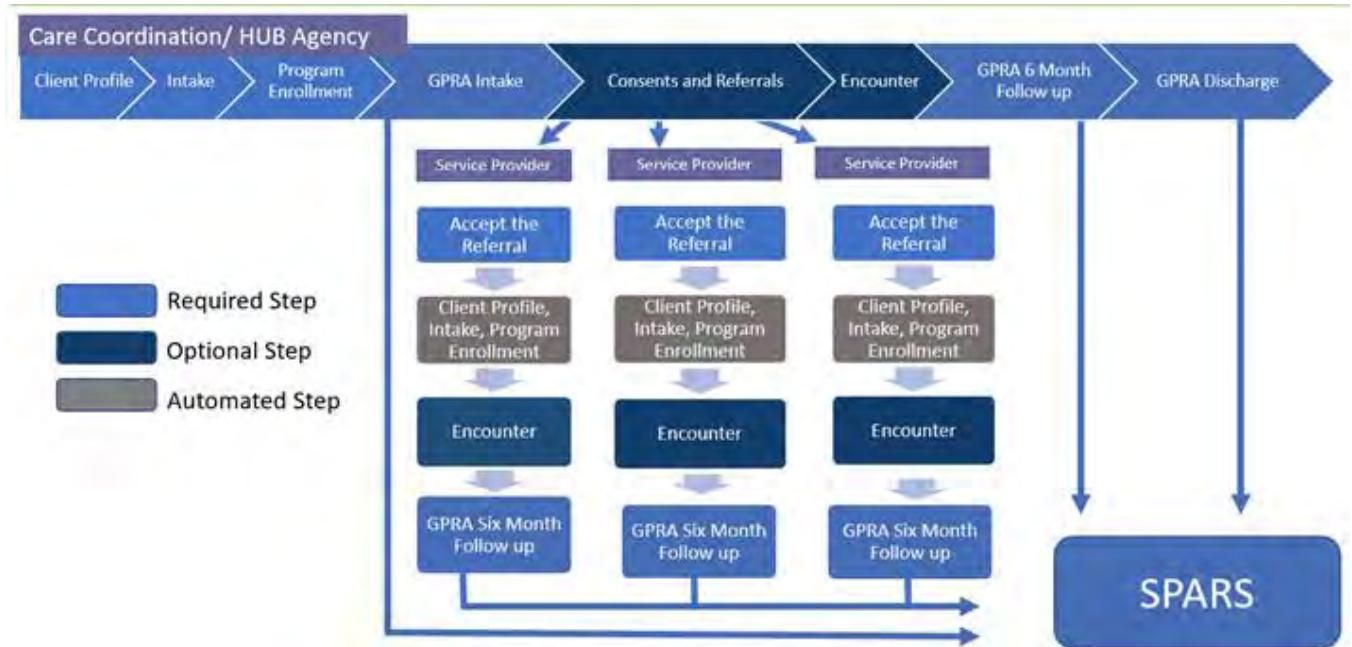


Figure 1-1: Standard SOR Workflow Diagram

WITS Structure Definitions

1. **Agency:** The legal entity that a provider operates within. Some people refer to this as 'Provider'.
2. **Facility:** The physical location (building) that an Agency/Provider uses to provide services. A provider can have more than one facility within a single building.
3. **Program:** The defined plan of treatment or grouping of services for a given set of individuals, equated with a modality and/or level of care. (e.g., MAT or Intensive Outpatient or Prevention).

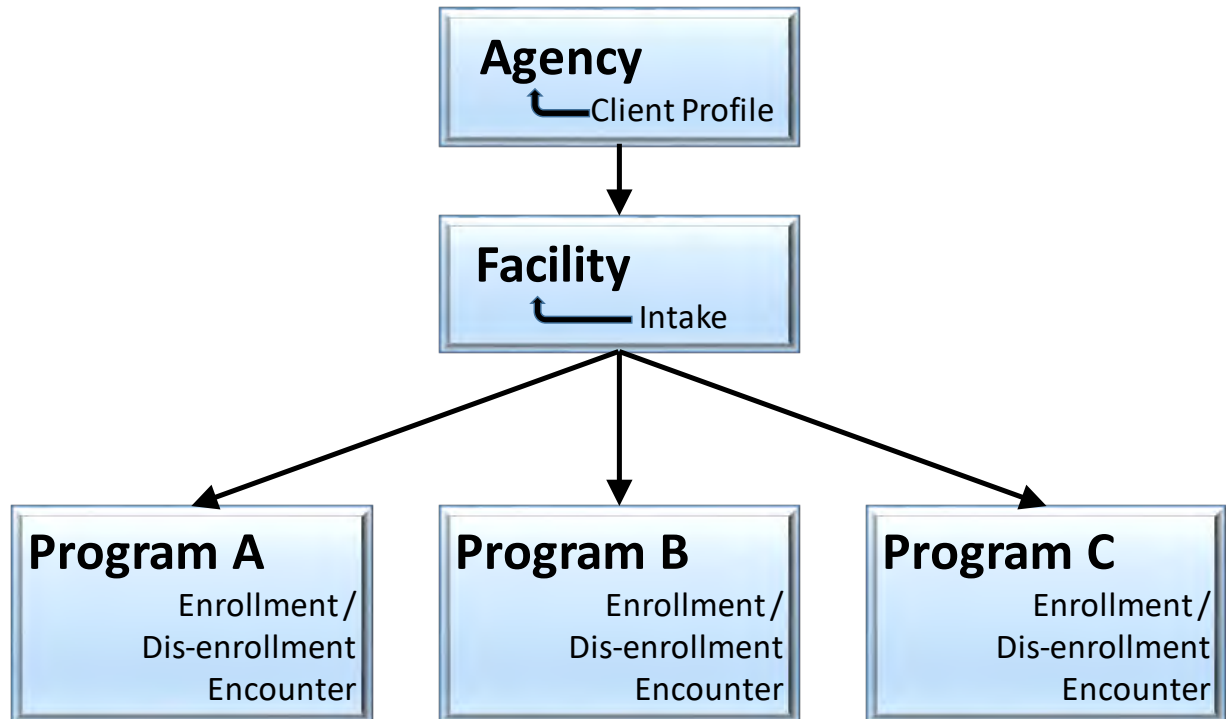


Figure 1-2: WITS Structure Overview

Grant Episode Concepts



Where: [Agency](#) > [Agency List](#) > [Facility List](#) > [Programs](#)

Background

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

Grant Episode Concepts

Table 1-1: Grant Episode Events and Information

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

WITS Administrator Process

Use Case: Client with GPRA intake at one provider goes to another provider 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?

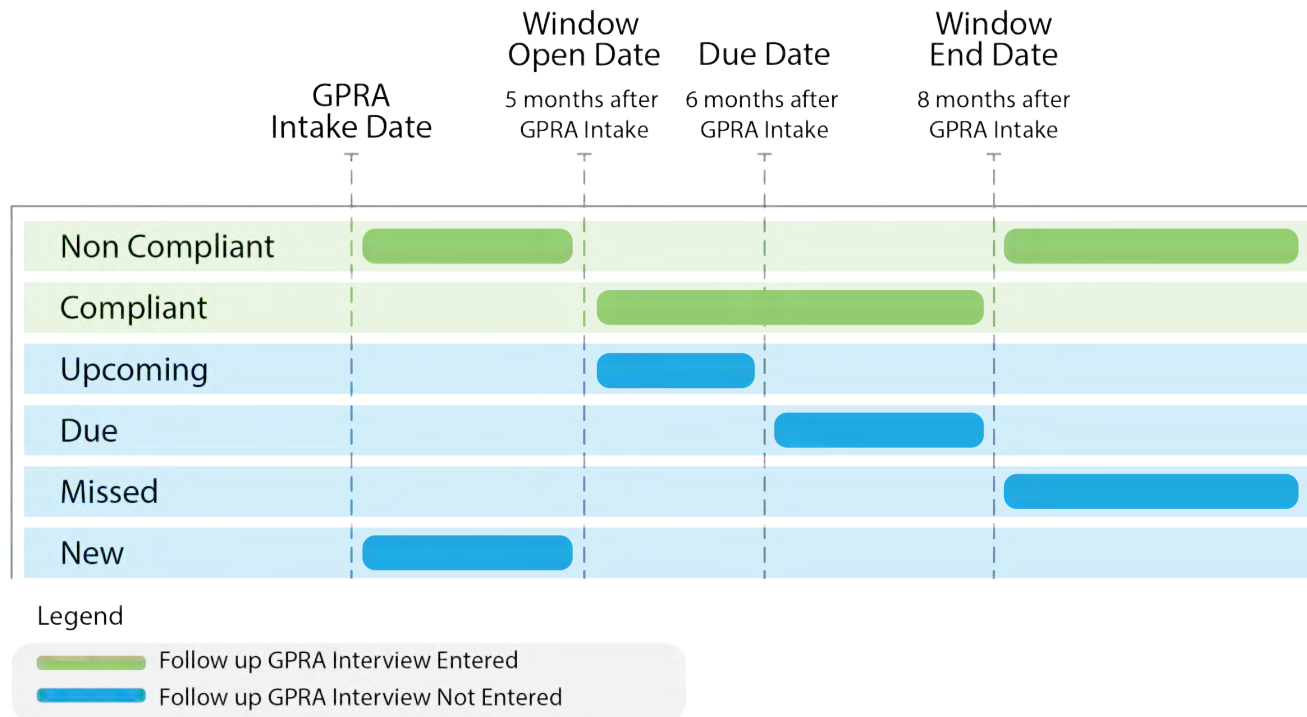
[Inactivate Episode](#) [Continue Episode](#) [Cancel](#)

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

GPRA Interview Compliance Details

Grant Requirement

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



Compliance Rate Calculation = $\text{Number Compliant} / (\text{Number Compliant} + \text{Number Non Compliant} + \text{Number Due} + \text{Number Missed})$

Figure 1-2: GPRA Follow-up Due Diagram

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

Table 1-2: Follow up Attendance Definitions

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

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

GPRA Follow-up Due Summary Screen



Where: [Agency](#) > [GPRA Follow-up Due Summary](#)

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

The search results will display a distinct count of GPRA interviews for each follow-up status available at the time of searching. For definitions of each status, see *Table 1-2: Follow up Attendance Definitions* on page 7 above.

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

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

Standard SOR QA 19.9.1 | Administrative Agency, Administrative Unit | Jones, Ashley | Logout

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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 (Export)		
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
Agency Type	In the Agency Type search field, the option " Intake " represents the agency where the GPRA Intake Interview was conducted. The option, " Follow-up " represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be prepopulated with the SOR grant.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has View GPRA Follow Up Compliance and All Agency Access roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has View GPRA Follow Up Compliance and All Agency Access roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.
Status	The Status search field will filter the list of clients corresponding to a specific compliance status. For definitions of each status, see <i>Table 1-2: Follow up Attendance Definitions</i> on page 7 above.

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

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

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

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

WITS Standard SOR QA 19.9.1 | Administrative Agency, Administrative Unit | Jones, Ashley | Logout

SSRS Reports | Snapshot

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

Figure 1-8: GPRA Discharge Due Screen

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

Actions	Client ID	Client Name	Intake Interview Agency	Intake Date	Intake Interview Date	Last Activity Date
	117	singh, Praneeti	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	
	126	Jainh, Muskan	Administrative Agency	1/1/2019	7/1/2019	9/30/2019
			AgencySor1	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.

Home Page

- Agency
 - Agency List
 - Agency Profile
 - Aliases
 - Contacts
 - MU Query
 - Governance
 - Relationships
 - Announcements

Agency Search

Domain:

[Clear](#) [Go](#)

Agency List

[Add New Agency Record](#)

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



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

Agency Profile

Agency Name: Administrative Agency

Display Name: Admin Agency

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: [Text Box]

Federal Tax ID: [Text Box]

State Business ID: [Text Box]

Contractor/Locator: [Text Box]

County: Bacon

Geo Code: [Text Box]

DBA: [Text Box]

Agency Type: Single State Agency

Inactive Date: [Text Box]

Consumer Rep Met: [Text Box]

URL: [Text Box]

Comments: System Testing Agency, Criminal Justice, Mental Health Treatment, Recovery Support Service Agency, Single State Agency, Substance Abuse Treatment

Senate Dist: [Dropdown]

House Dist: [Dropdown]

Cong Dist: [Dropdown]

Domains: [Empty]

Selected Domains: Substance Abuse

Buttons: Cancel, Save, Finish, Search, Right Arrow

Figure 2-2: Agency Profile screen

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

Addresses

Home Page

Agency

Agency List

Agency Profile

Addresses/Phone

Aliases

Contacts

Buttons: Cancel, Save, Finish, Search, Left Arrow

Figure 2-3: Address/Phone List screen

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

Table 2-2: Address Information Fields

Field	Description
Address Type	Select from the drop-down menu.
Confidential	This field defaults to "No"; update if applicable.

Field	Description
Address Line 1	Type the first address line.
Address Line 2	Type the second address line, if applicable.
City	Type the city name.
State	Select state from the drop-down menu.
Zip	Type the zip code.

Figure 2-4: Address Information screen

- 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
Disclosing Agency	Select the name of your agency from the drop-down menu.
Receiving Agency	Select “Global Policy or Non System”, or select an individual agency name. The “Global Policy” will apply this consent template to any agency in WITS. If an individual agency is selected, the consent template will apply only to that agency.
Receiving Entity (Non System Agency)	If this disclosure agreement applies to an agency outside of WITS, type that agency’s name in this field.

Field	Description
Global Policy? (Available To All Agencies)	Select Yes or No.
Always Verify Consent	Select Yes or No. This serves as a visual reminder to the person creating the consent.

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

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

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

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

STATE OPIOID RESPONSE (SOR) GRANT 2 | FEI Systems

Agency Profile | 19

Alerts

Alert Types



Where: [System Administration > Alert Types](#)

WITS Administrators can determine which alert types are available by accessing a list of alerts under System Administration. The following list of GPRA alerts are now enabled.

Table 2-4: Add Caption for this sample table

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

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

Standard SOR QA | Administrative Agency, Administrative Unit | Jones, Ashley | Logout

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Alert Type List

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

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

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

Figure 2-11: Agency Alert Configuration Profile

Which staff should receive this message?

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

Staff Member	Description
Treatment Team Case Manager	Staff member on the client's treatment team with the role of "Case Manager".

Announcements (Optional)



Where: [Agency](#) > [Agency List](#) > [Announcements](#)

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

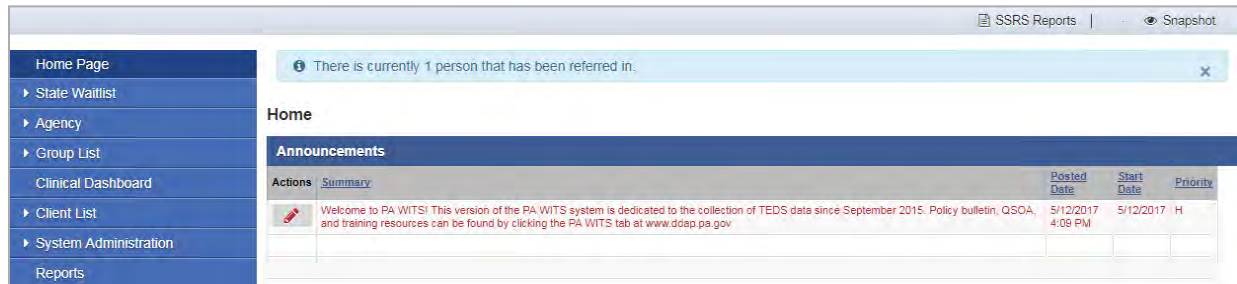


Figure 2-12: Home Page with Announcement in red text

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

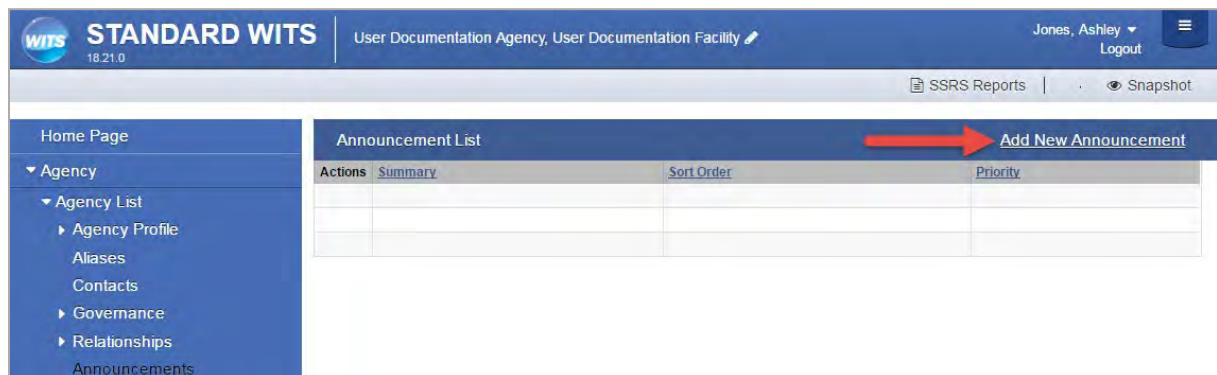
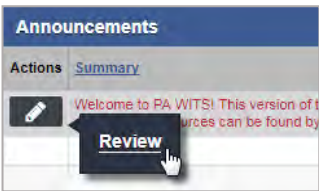


Figure 2-13: Announcements List screen

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

Table 2-6: Announcements Fields

Field	Description
Summary	Type a summary of the announcement.
Details	<p>(Optional) Type additional details about the announcement. Users will be able to see these details by hovering over the Actions column, and clicking Review.</p> 

Field	Description
Agency Type	(Optional) To display an announcement for all agencies with a specific Agency Type, select an option from the Agency Type drop-down field.
Selected Domains	(Optional) Select one or more domains where the announcement should be displayed.
Agency	If the Agency drop-down field is left blank, the announcement will be displayed across all agencies.
Priority	Select from the drop-down field. A Priority of "High" will display the announcement in red.
Start Date	Enter a start date for the announcement.
End Date	Enter an end date for the announcement.

Figure 2-14: Announcements screen

- 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.

Actions	Summary	Sort Order	Priority
	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 www.ddap.pa.gov		H
	Substance Abuse Domain Announcement		N
	agencies		N

Figure 2-15: Announcement List screen, Actions links

Part 3: Facility Administration

Facility Profile



Where: [Agency](#) > [Facility List](#) > [Facility Profile](#)

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

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

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

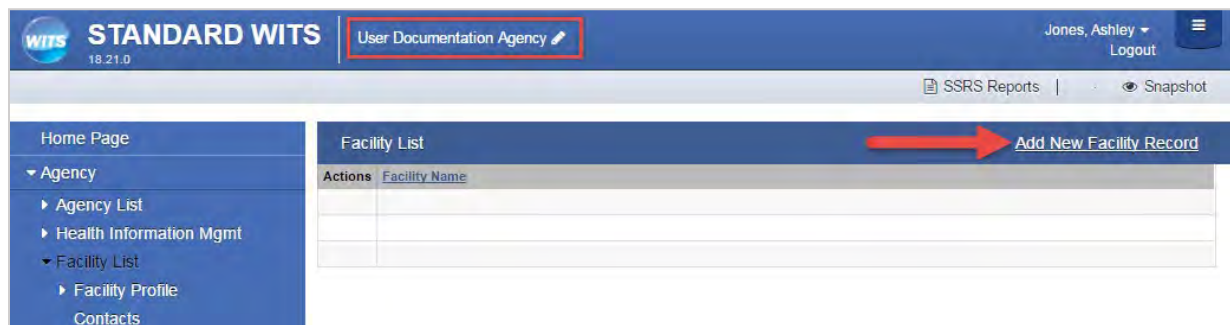


Figure 3-1: Facility List screen

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

Table 3-1. Facility Profile Fields

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

Field Name	Description
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


Cancel Save Finish 

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.

Figure 3-3: Add Facility Address

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

Table 3-2: Address Information fields

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

Figure 3-4: Facility Address screen

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

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

9. Enter the phone number, and then click **Finish**.
10. 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

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

Contacts



Where: [Agency](#) > [Agency List](#) > [Facility List](#) > [Contacts](#)

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

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

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

Figure 3-8: Facility Contacts screen

3. Complete the fields.

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

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

Special Services (Optional)



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

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

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

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

Figure 3-11: Add New Information Item screen

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

5. Click **Save**.

Programs



Where: [Agency](#) > [Agency List](#) > [Facility List](#) > [Programs](#)

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

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

The screenshot shows the WITS Standard WITS interface. The top navigation bar includes the WITS logo, version 18.21.0, and the user 'Jones, Ashley' with a 'Logout' button. Below the navigation bar, there are links for 'SSRS Reports' and 'Snapshot'. The left sidebar contains a menu with 'Home Page', 'Agency', 'Facility List', and 'Programs'. The main content area displays the 'Program List' table with columns: Actions, Program Name, Modality, # Slots, Current Enrolled, Residence, Gender Specific, and Term. A red arrow points to the 'Add New Program Record' link in the top right corner of the table area.

Actions	Program Name	Modality	# Slots	Current Enrolled	Residence	Gender Specific	Term

Figure 3-12: Programs List



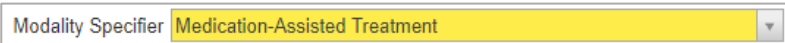
Important: Program Setup Fields for SOR Processing:

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




Figure 3-13: New Profile Setup screen

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

Table 3-3: Program Setup Fields ²

Field	Description
Program Name	Program may be titled anything you or the provider desires.
Display Name	Type the program's display name. Note: this field is limited to 15 characters.
Domain	Select the domain from the drop-down list.
Modality*	Select modality that is the best fit for this program. Note: Values are controlled through the code table named, "Modality Type". See Part 5: System Administration, Code Table: Modality Type on page 72.
Modality Specifier*	To record medication-assisted treatments on client encounters, select "Medication-Assisted Treatment" from the drop-down field.  Note: Values are controlled through the code table named, "Modality Specifier". See Part 5: System Administration, Code Table: Modality Specifier on page 75.

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

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

Program Setup

Agency Name: Provider Agency

Facility Name: Provider Facility

Program Name: SOR 2 MAT

Display Name: SOR 2 MAT

Domain: Substance Abuse

Modality: Detoxification, 24 Hour Service, Free-Standing Residential

Modality Specifier: Medication-Assisted Treatment

Current Enrolled:

Program Type: Substance Abuse Treatment

Level of care: 3 2-WM - Clinically Managed Residential Withdrawal Management

Residence: County 1

Report to State: Yes

Report to TEDS: No

Grant: SOR II

Available Reporting Guidelines: [Empty]

Selected Reporting Guidelines: [Empty]

Age Group: [Empty]

Gender Specific: [Empty]

Available Evidence-Based Practices: None, Motivational Interviewing

Selected Evidence-Based Practices: Peer support, Relapse Prevention

Program Start Date: 1/1/2019

End Date: [Empty]

Buttons: Cancel, Save, Finish

Figure 3-14: Example of MAT Program Setup fields


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

Capacity List					Add New Capacity	
Actions	Capacity Type	Capacity	Start Date	End Date		

6. Complete the fields:

Table 3-4: Program Capacity Details fields

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



Program Capacity Details

Capacity Type: Slots

Daily Capacity: 20

Start Date: 5/31/2017

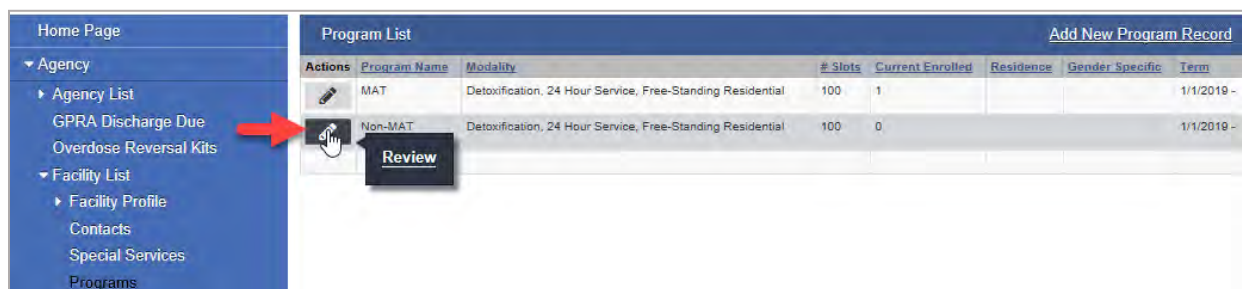
End Date:



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							Add New Program Record
▼ 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).
- On the left menu, click **Operating Hours**.
 - 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	8:00 AM - 12:00 PM	12:30 PM - 8:00 PM	
Tuesday	8:00 AM - 12:00 PM	12:30 PM - 8:00 PM	
Wednesday	8:00 AM - 12:00 PM	12:30 PM - 8:00 PM	
Thursday	8:00 AM - 12:00 PM	12:30 PM - 8:00 PM	
Friday	8:00 AM - 12:00 PM	12:30 PM - 8:00 PM	
Saturday			
Sunday			

Cancel Save Finish

Figure 3-17: Facility Operating Hours

- Click **Save**.

Part 4: Staff Management

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

Staff Member List & Search Screen



Where: Agency > Staff Members

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

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

Table 4-2: Workspace Screen Icons/Buttons

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

Table 4-3: Workspace Screen Data Fields




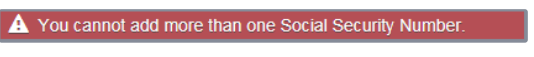

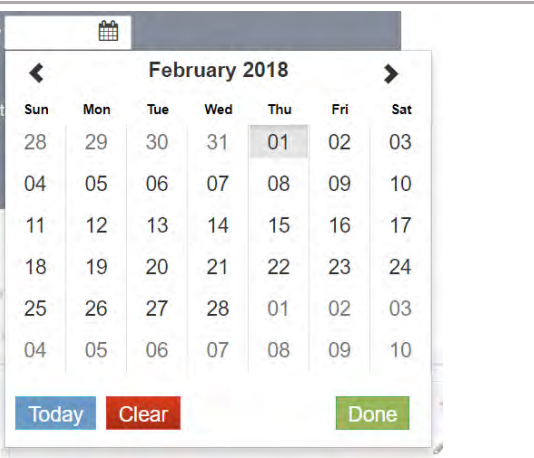
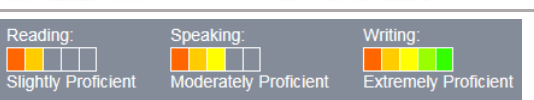
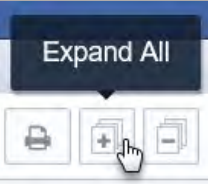
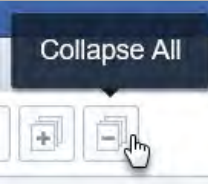

Field	Description
	Required Field: Required fields are marked with a red line on the right side. This field must be completed to save the screen/panel.
	Optional Field: This field may be left blank.
	Drop-down field: Select one option from the list.
	Error Message: The error message is localized and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

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

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

Staff Member Search



Where: Agency > Staff Members

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

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)

Advanced Search

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

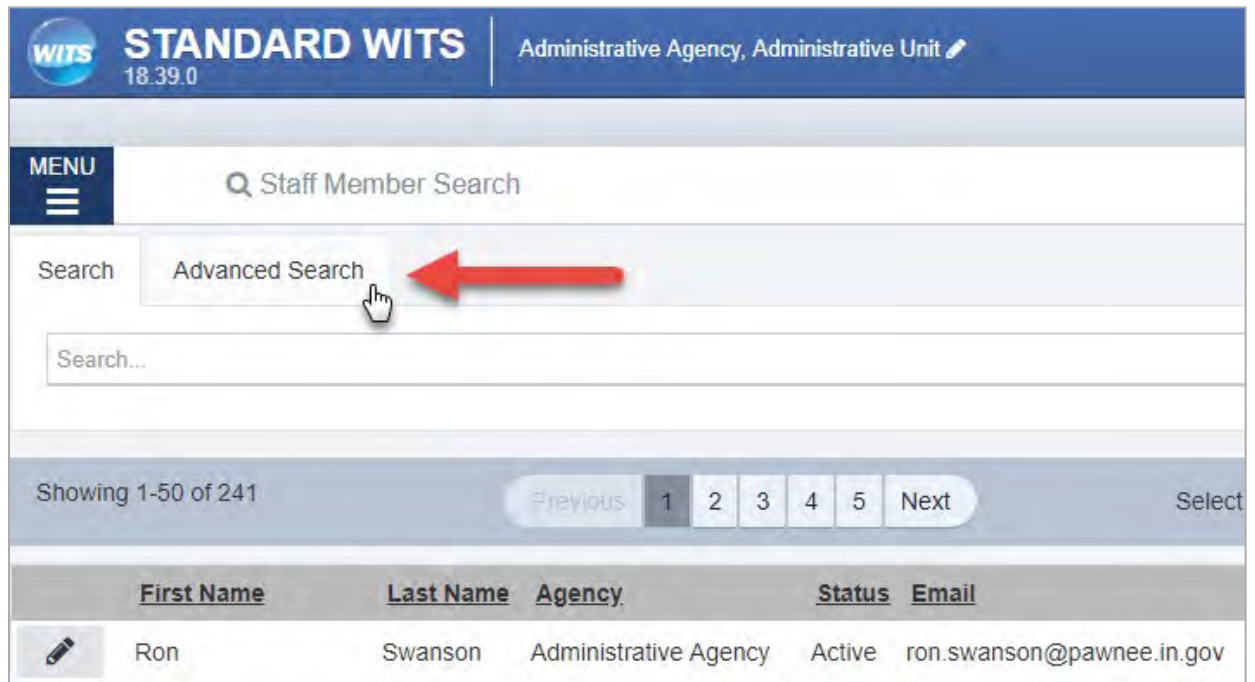


Figure 4-2: Advanced Search tab

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

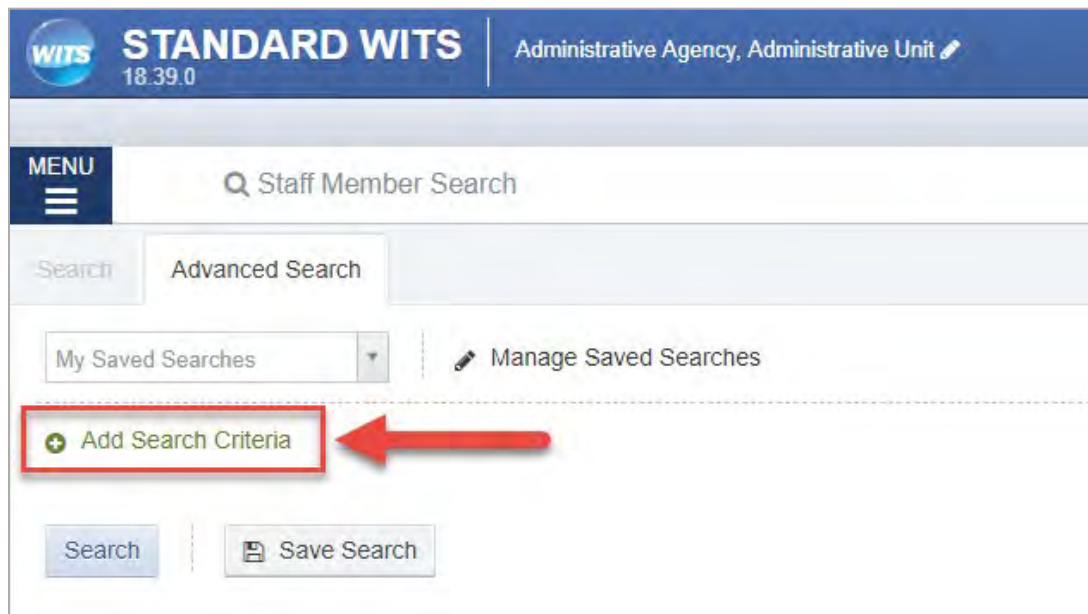
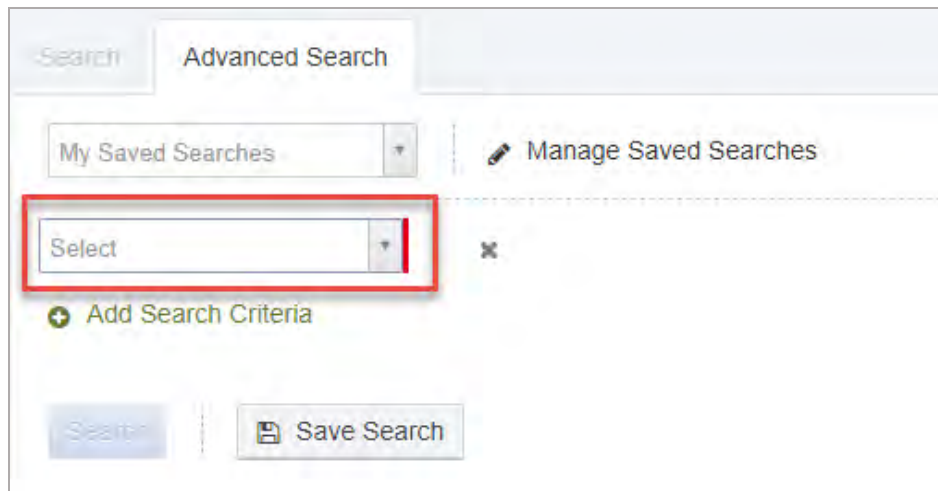
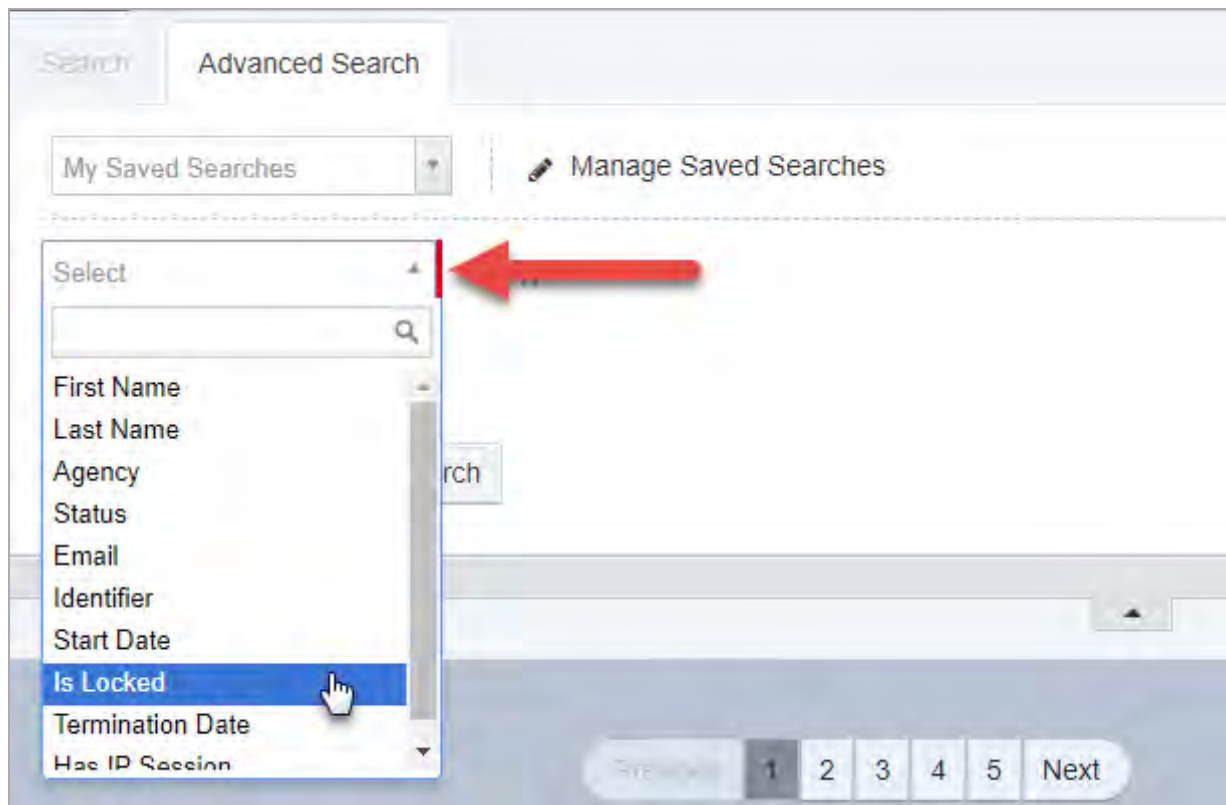


Figure 4-3: Add Search Criteria



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. The dropdown menu is currently open, showing a list of search criteria. A red box highlights the dropdown menu. To the right of the dropdown menu, there is a 'Manage Saved Searches' link. Below the dropdown menu, there is a 'Select' button. At the bottom of the page, there are two buttons: 'Search' and 'Save Search'.

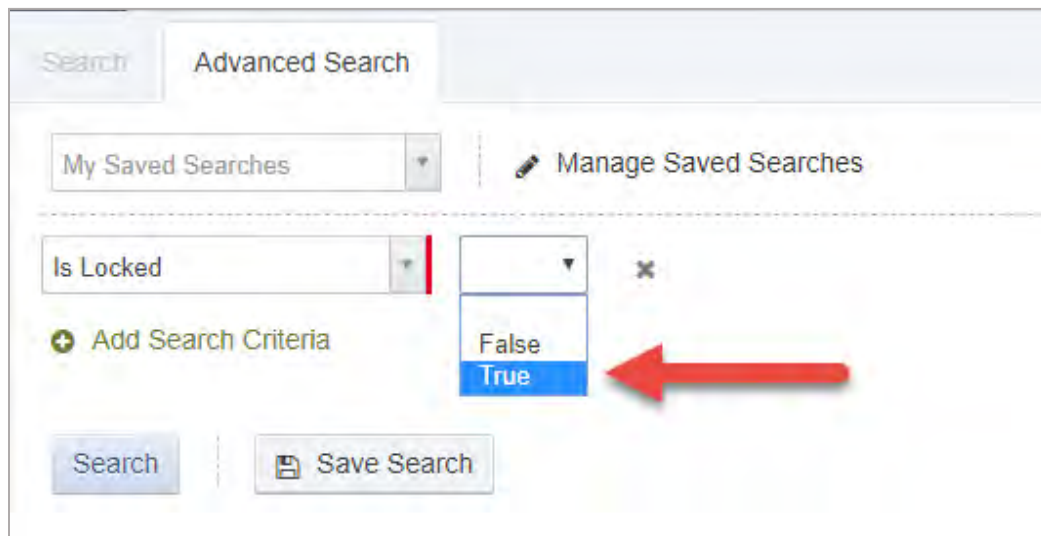
- Click an option from the drop-down list.



The screenshot shows the 'Advanced Search' tab in a web application. The 'My Saved Searches' dropdown menu is open, displaying a list of search criteria. A red arrow points to the dropdown menu. The list of search criteria includes: First Name, Last Name, Agency, Status, Email, Identifier, Start Date, Is Locked (highlighted with a blue background and a mouse cursor), Termination Date, and Has IP Session. At the bottom of the page, there are buttons for 'Previous', '1', '2', '3', '4', '5', and 'Next'.

Figure 4-4: Advanced Search Selection

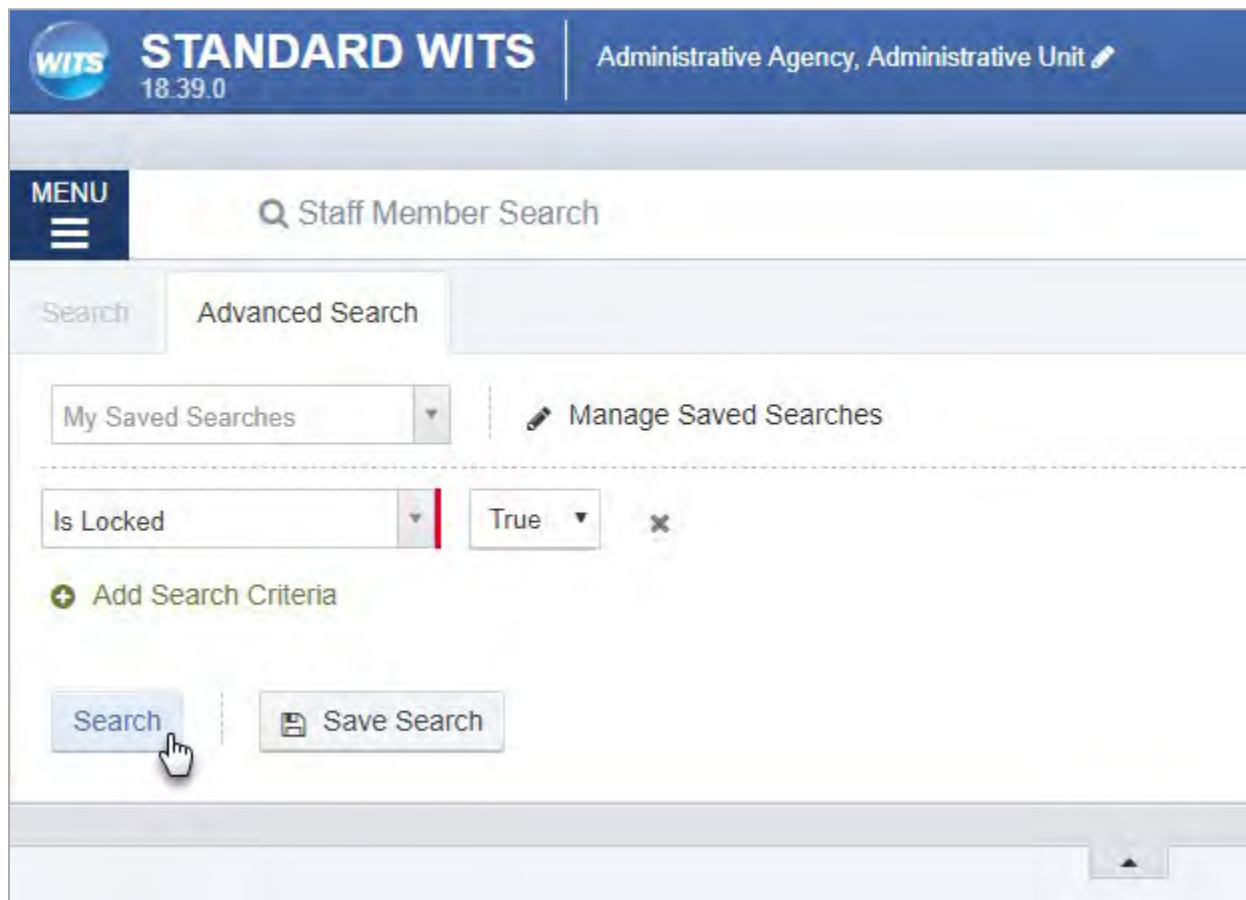
- Based on the option selected, additional field(s) will be displayed to select further search criteria. In this example, select True or False.



The screenshot shows the 'Advanced Search' tab selected. Below it, there's a 'My Saved Searches' dropdown and a 'Manage Saved Searches' link. The main search area has a dropdown labeled 'Is Locked' which is open, showing 'False' and 'True' options. A red arrow points to the 'True' option. Below the dropdown is a '+ Add Search Criteria' button. At the bottom are 'Search' and 'Save Search' buttons.

Figure 4-5: Additional Advanced Search Criteria

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



The screenshot shows the 'STANDARD WITS 18.39.0' header with 'Administrative Agency, Administrative Unit' on the right. A 'MENU' button is on the left. The main title is 'Staff Member Search'. Below it, the 'Advanced Search' tab is selected. The 'Is Locked' dropdown is now set to 'True'. A hand cursor is pointing at the 'Search' button at the bottom left.

Figure 4-6: Advanced Search; Click Search

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

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

My Saved Searches | Manage Saved Searches

Is Locked | True | X

Add Search Criteria

Search | Save Search

Search results for "true,"

Showing 1-1 of 1

Select Columns | Select View

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

Previous | 1 | Next

Save Advanced Searches

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

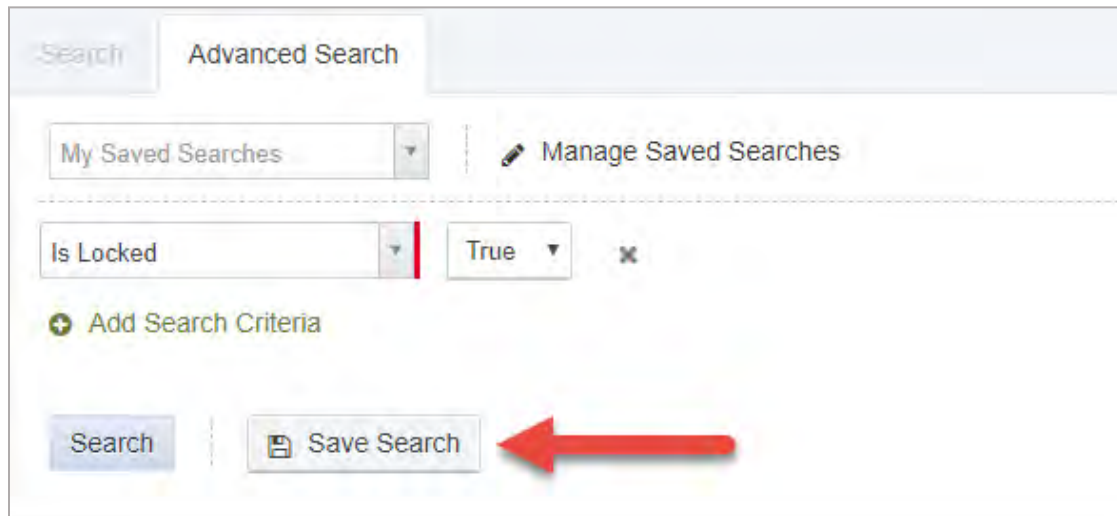
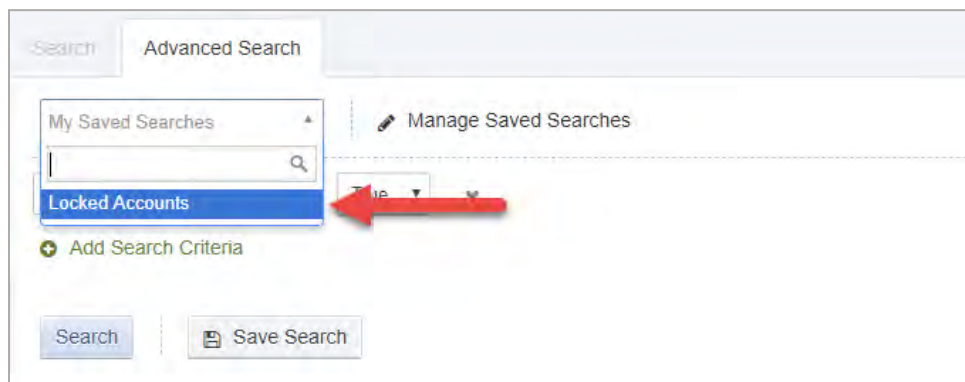


Figure 4-7: Advanced Search, Save Search

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



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



How to Set Up a New Staff Member Account



Where: *Agency > Staff Members*

Follow the steps below to create a new staff account.



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

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

Figure 4-8: Staff Member screen

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

Table 4-5: Create New Staff Member fields

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

The screenshot shows a web application interface for 'PA-WITS Training'. A modal window titled 'Create New Staff Member' is open. It contains the following fields:

- Prefix: (empty)
- First: Clinical
- Preferred: (empty)
- Middle: (empty)
- Last: Staff
- Suffix: (empty)
- Gender: Not Collected (dropdown menu)

At the bottom of the modal are two buttons: 'Create' and 'Cancel'.

Figure 4-9: Create New Staff Member screen

- 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.

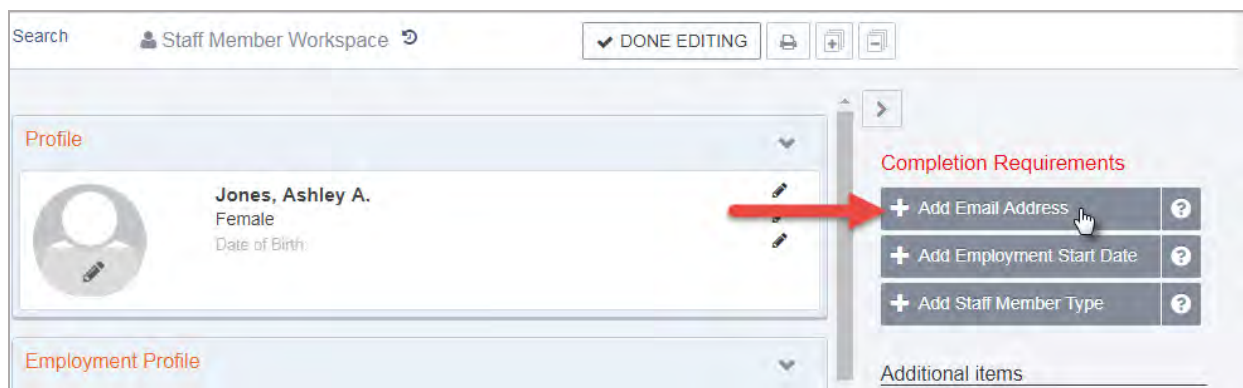


Figure 4-11: Completion Requirements, Add Employee Start Date

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

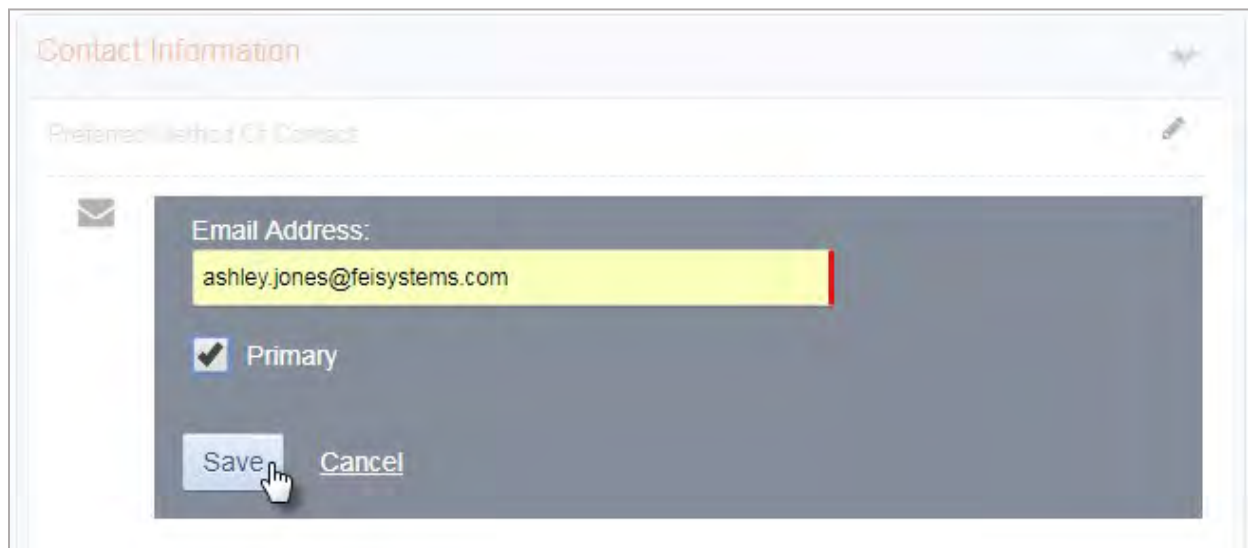
The screenshot shows a web interface titled "Contact Information" in a light blue header. Below the header is a section titled "Preferred Method Of Contact" with a small envelope icon to its left. Inside this section, there is a dark grey box containing the text "Email Address:" followed by a yellow text input field containing the email address "ashley.jones@feisystems.com". Below the input field is a checkbox labeled "Primary", which is checked with a blue checkmark. At the bottom of the dark grey box are two buttons: "Save" and "Cancel". A mouse cursor is pointing at the "Save" button.

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

i 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 with fields for 'Preferred Method Of Contact' (showing an email address 'ashley.jones@feisystems.com' as 'Primary') and sections for 'Add Email Addresses', 'Add Phone Numbers', and 'Add Physical Addresses'. On the right, the 'Completion Requirements' section contains two buttons: '+ Add Employment Start Date' and '+ Add Staff Member Type'. A red arrow points to the '+ Add Employment Start Date' button. Below this, an 'Additional items' list includes: Add Identifier, Define Employment Profile, Add Facility Assignment, Add Professional Qualification, Add Email, and Add Phone Number.

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. It contains fields for 'Job Title' (a dropdown menu), 'Include Job Title in Display Name' (a checkbox), 'Staff Member Type' (a dropdown menu), 'Employment Type' (a dropdown menu), and 'Employment Date Range'. The 'Employment Date Range' field shows '01/17/2017' and a calendar icon. A red arrow points to the calendar icon. A calendar overlay for 'January 2017' is displayed, showing dates from 01 to 31. The date '17' is highlighted. At the bottom of the calendar are buttons for 'Today', 'Clear', and 'Done'. The right sidebar is identical to Figure 4-13, showing 'Completion Requirements' and 'Additional items'.

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.

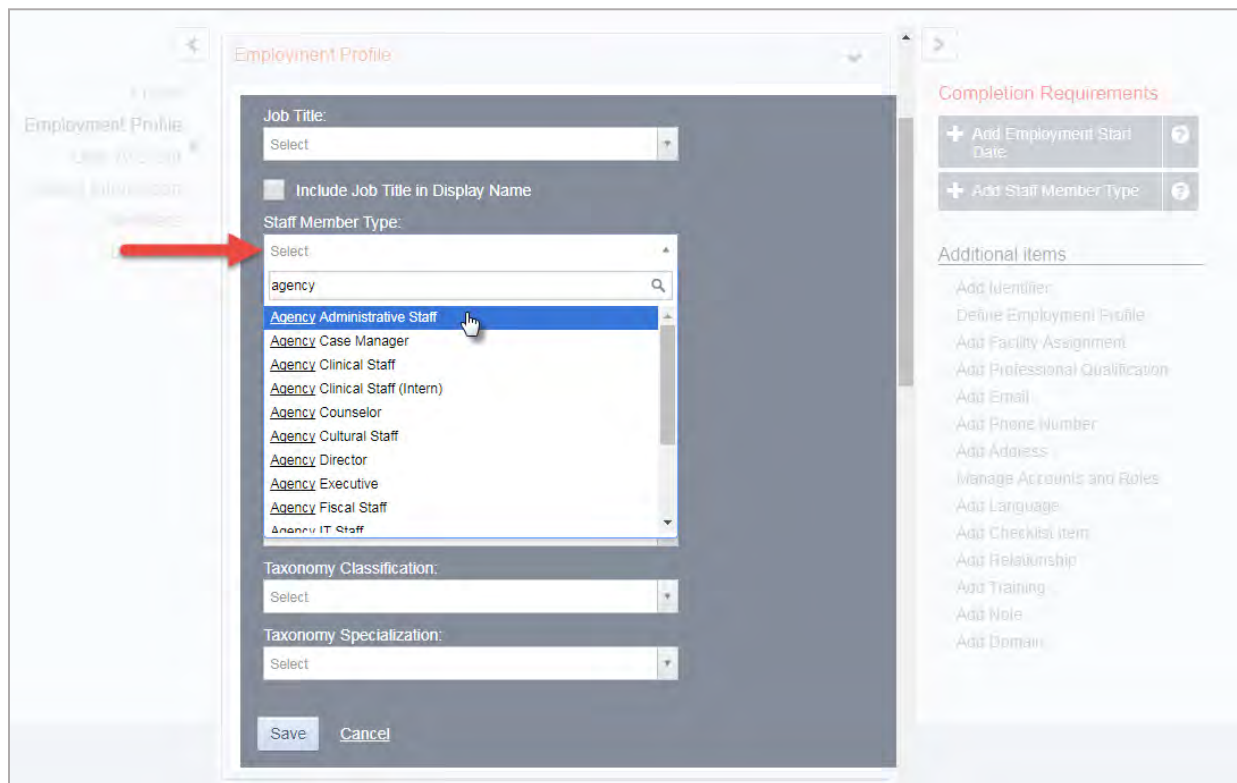
The screenshot shows the 'Employment Profile' panel in a software interface. On the left, there's a sidebar with 'Employment Profile' selected. The main panel has a 'Job Title' dropdown set to 'Select', a checkbox for 'Include Job Title in Display Name', and a 'Staff Member Type' dropdown. The 'Staff Member Type' dropdown is open, showing a search bar with 'agency' entered and a list of roles including 'Agency Administrative Staff' (highlighted), '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'. Below this are 'Taxonomy Classification' and 'Taxonomy Specialization' dropdowns, both set to 'Select'. At the bottom are 'Save' and 'Cancel' buttons. To the right of the main panel, there's a 'Completion Requirements' section with buttons for '+ Add Employment Start Date' and '+ Add Staff Member Type', and an 'Additional Items' section with a list of tasks like 'Add Identifier', 'Define Employment Profile', etc.

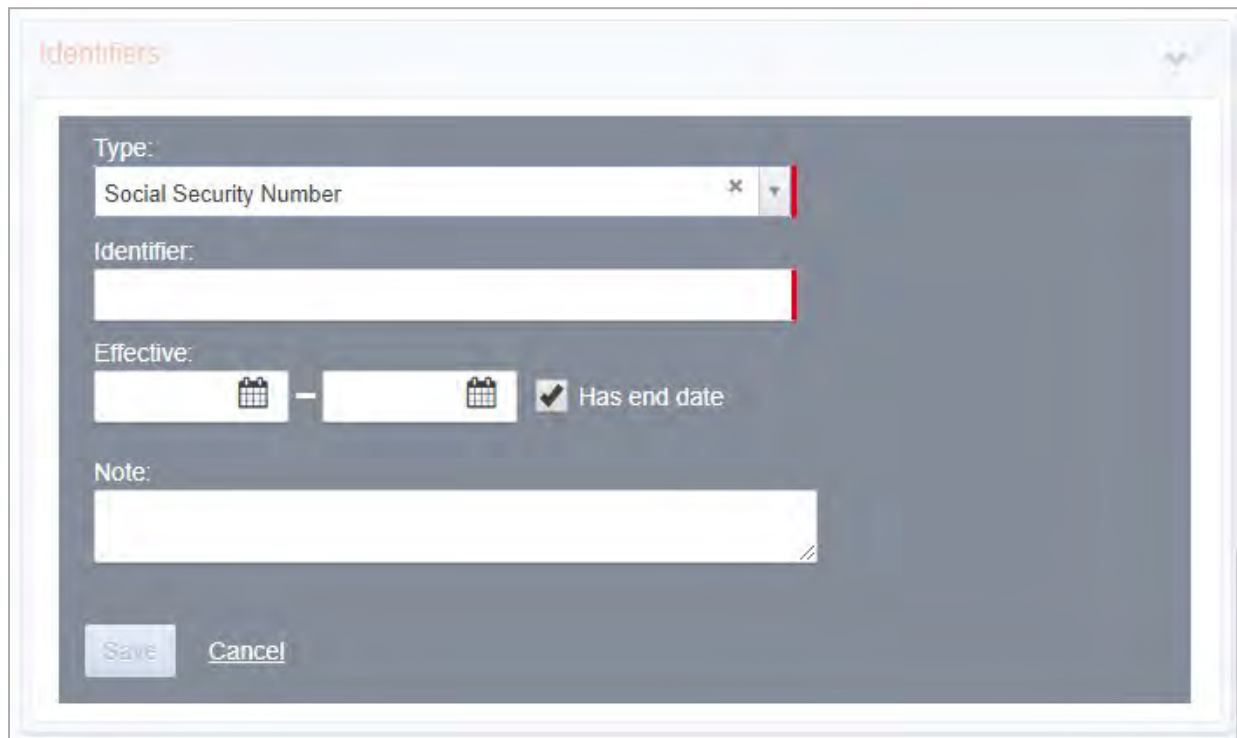
Figure 4-15: Employment Profile panel, Staff Member Type field

- 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. The 'Type:' dropdown is set to 'Social Security Number'. The 'Identifier:' field is empty. The 'Effective:' section shows two date pickers with a minus sign between them, and a checked checkbox for 'Has end date'. The 'Note:' field is empty. The 'Save' and 'Cancel' buttons are at the bottom.

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**.

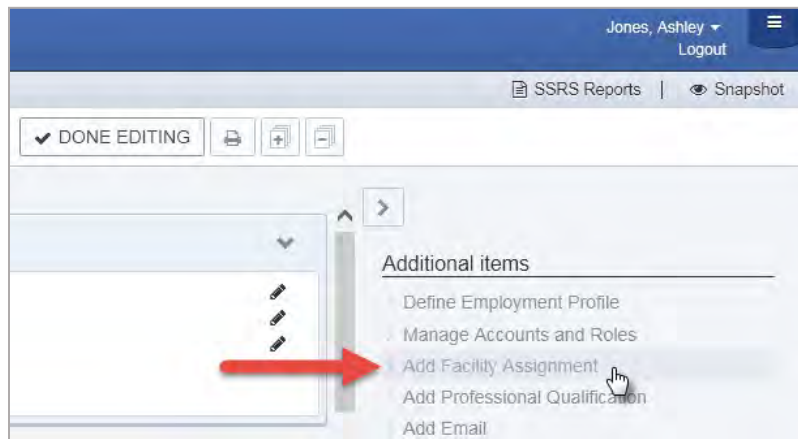


Figure 4-17: Additional Items section, Add Facility Assignment

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

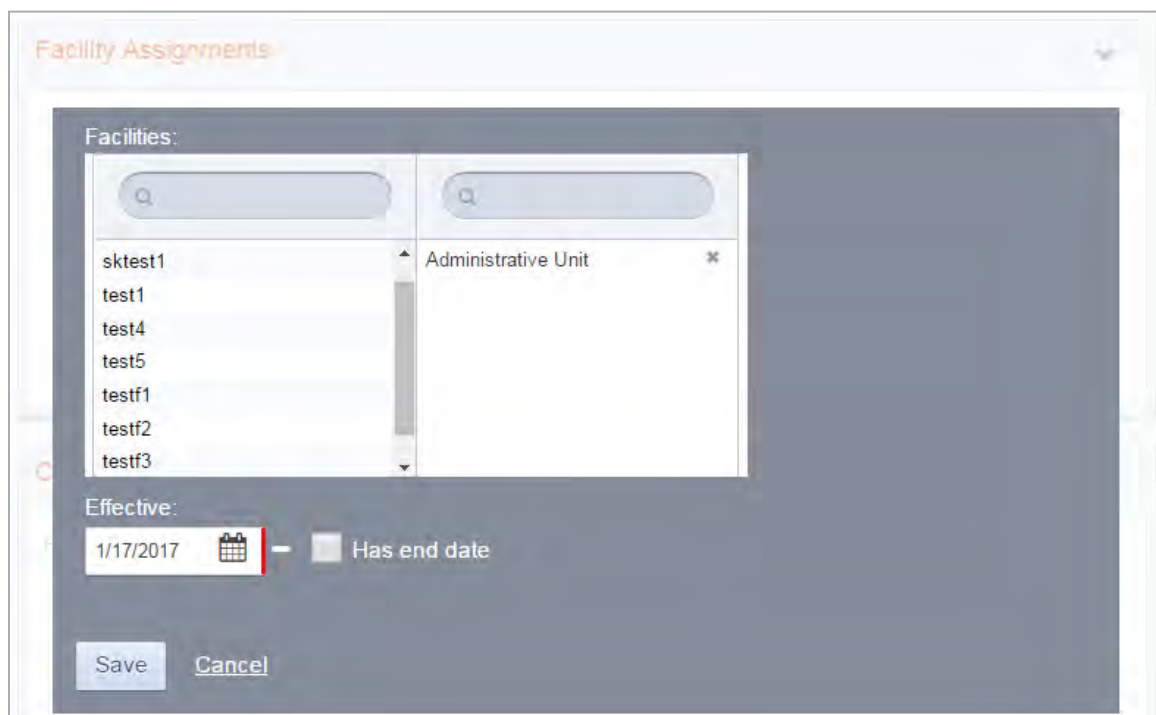


Figure 4-18: Facility Assignments panel

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**.

The screenshot shows the 'User Account' panel in the WITS system. The panel has a left sidebar with navigation links: Profile, Employment Profile, User Account, Contact Information, Identifiers, and Domains. The main content area is divided into sections: Profile (Staff, Agency, Not Collected, Date of Birth), Employment Profile (Job Title, Staff Member Type: Agency Administrative Staff, Employment Type, Employment Date Range: 01/17/2017 -), and User Account (Add Account). A red arrow points to the 'Add Account' button in the User Account section. On the right, there is an 'Additional items' list with options like Define Employment Profile, Manage Accounts and Roles, Add Facility Assignment, Add Professional Qualification, Add Email, Add Phone Number, Add Address, Add Identifier, Add Language, Add Checklist Item, Add Relationship, Add Training, Add Note, and Add Domain.

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 67 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.

The screenshot shows the 'User Account' panel with a modal form for creating a new account. The form has two input fields: 'User ID:' and 'Email Address:'. Red arrows point to these fields from the left sidebar. At the bottom of the form are two buttons: 'Create Account' and 'Cancel'.

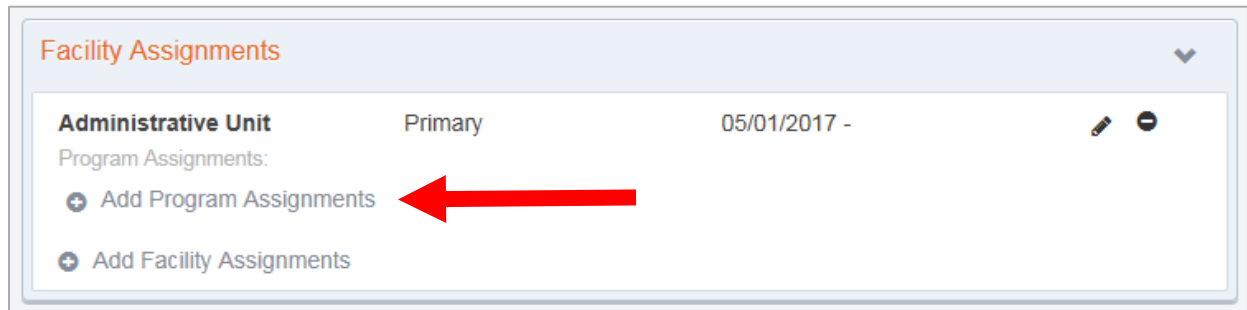
Figure 4-20: User Account panel, required fields

4. Click **Create Account**.

Add Program Assignment (Optional)

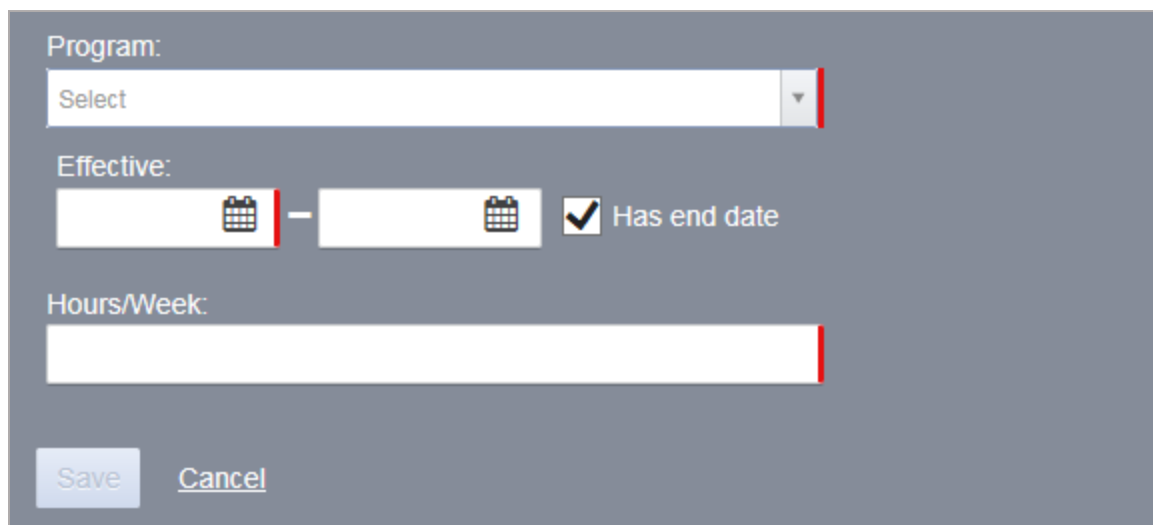
The Program Assignment option under Facility Assignments will allow a staff member to provide services to clients in that program. A staff member can be assigned to multiple programs, and program assignments must be made under each facility the staff member is assigned to.

1. Click **Add Program Assignments**.



The screenshot shows a 'Facility Assignments' window. At the top, it says 'Administrative Unit' with the value 'Primary' and a date '05/01/2017 -'. Below this, under 'Program Assignments:', there are two buttons: '+ Add Program Assignments' and '+ Add Facility Assignments'. A red arrow points 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 three main input fields: 'Program:' with a dropdown menu showing 'Select'; 'Effective:' with two date pickers and a 'Has end date' checkbox; and 'Hours/Week:' with a text input field. At the bottom, there are 'Save' and 'Cancel' buttons.

User Roles

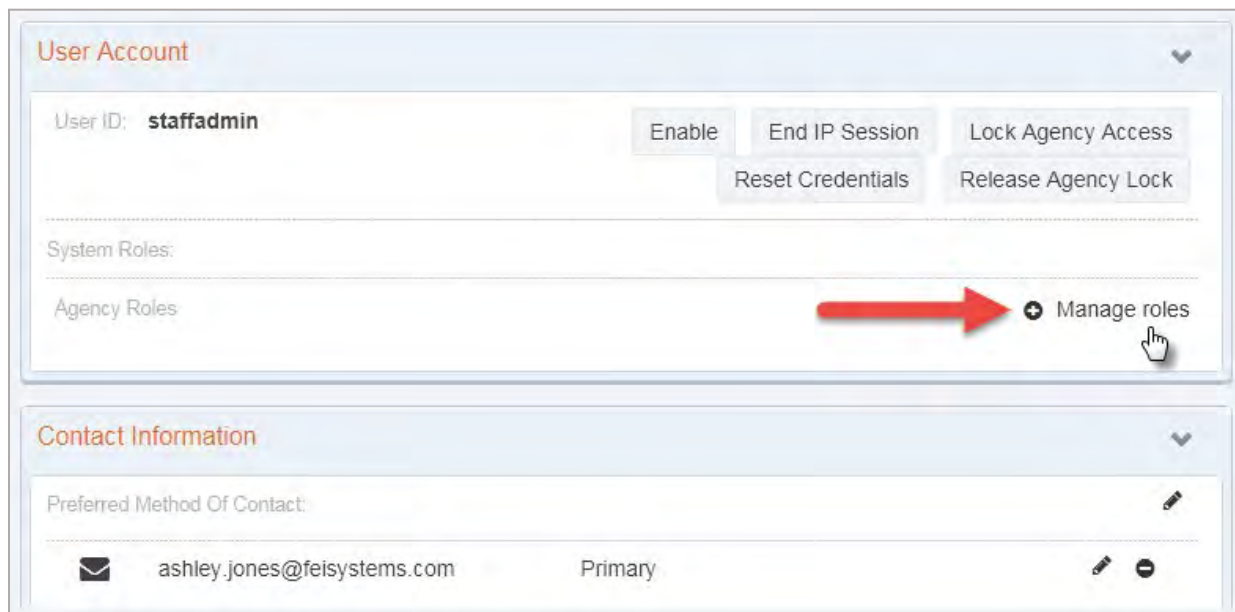
After creating the User ID, roles can be granted to the staff member. When adding roles, it's important to consider the type of data the individual staff member will be entering and what type of information the individual needs access to within WITS.

Table 4-6: SOR Related Roles

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

Assign User Roles

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



The screenshot shows the 'User Account' panel with the following details:

- User ID:** staffadmin
- Actions:** Enable, End IP Session, Lock Agency Access, Reset Credentials, Release Agency Lock
- System Roles:** (empty list)
- Agency Roles:** (empty list)
- Manage roles link:** A red arrow points to a link labeled '+ Manage roles' with a hand cursor icon.
- Contact Information:**
 - Preferred Method Of Contact:** (empty dropdown)
 - Email:** ashley.jones@feisystems.com (Primary)

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.

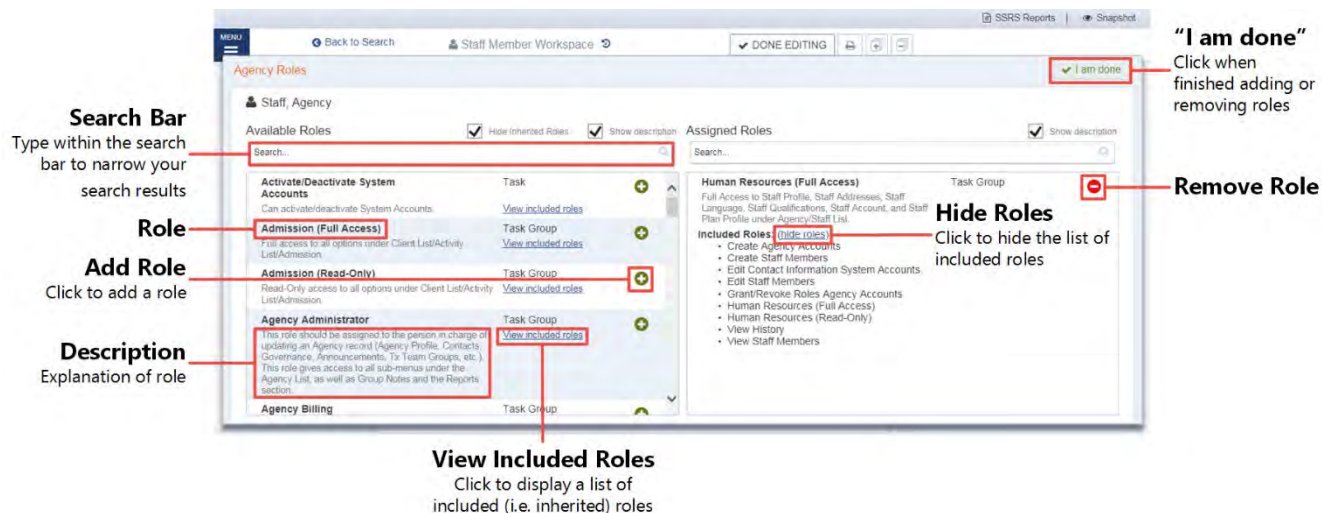
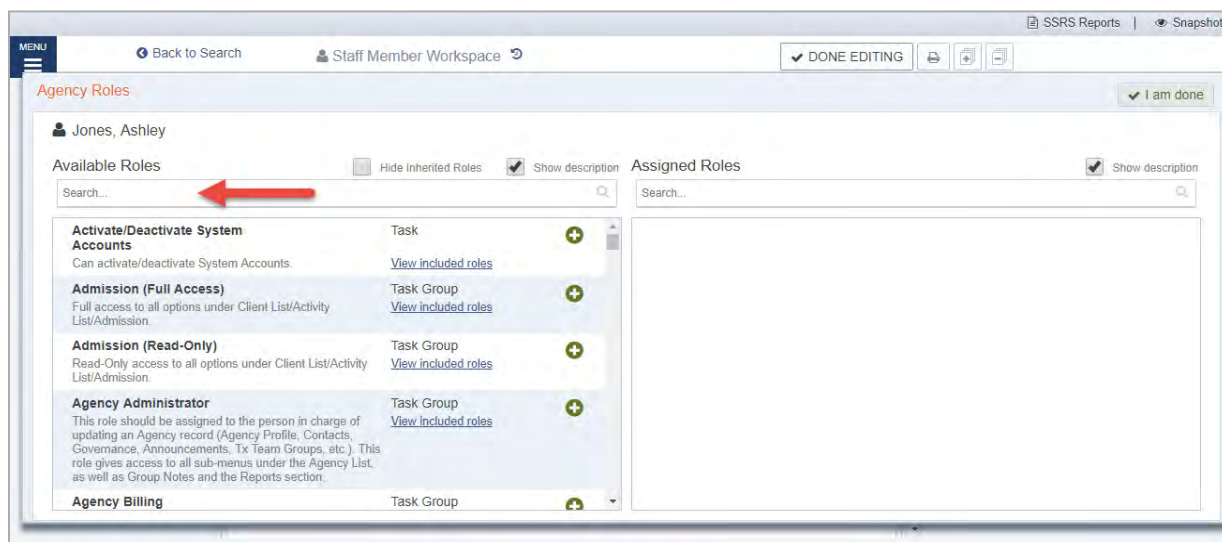


Figure 4-22: Manage Roles Screen

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 screenshots from a software interface. The top screenshot is titled "Professional Qualifications" and contains the following fields: "Category:" with a dropdown menu showing "License"; "Type:" with a dropdown menu showing "Substance Use Disorder Counselor (SUDC)"; "Issuer Name:" with an empty text box; a checked checkbox for "Include in Display Name"; "Effective:" with a date field showing "5/1/2015" and a calendar icon; and a checked checkbox for "Has end date". At the bottom are "Save" and "Cancel" buttons. The bottom screenshot is titled "Profile" and shows a staff member's profile card. 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 an empty field. To the right of the profile card are three small 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.

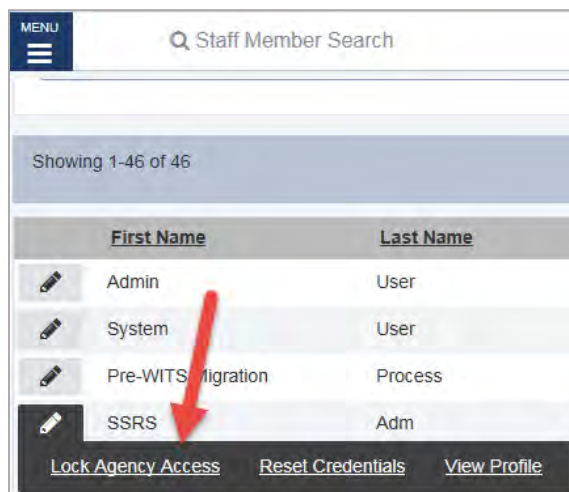
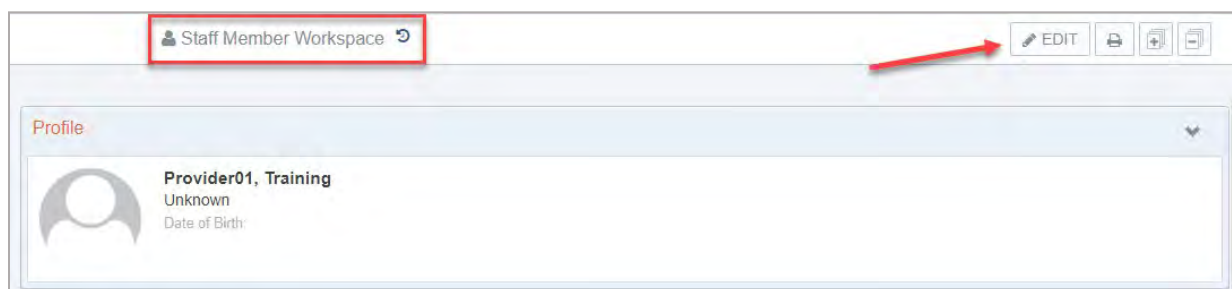


Figure 4-23: Staff Member Search Screen, Lock Agency Access

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)

Buttons: 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.

Buttons: 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:

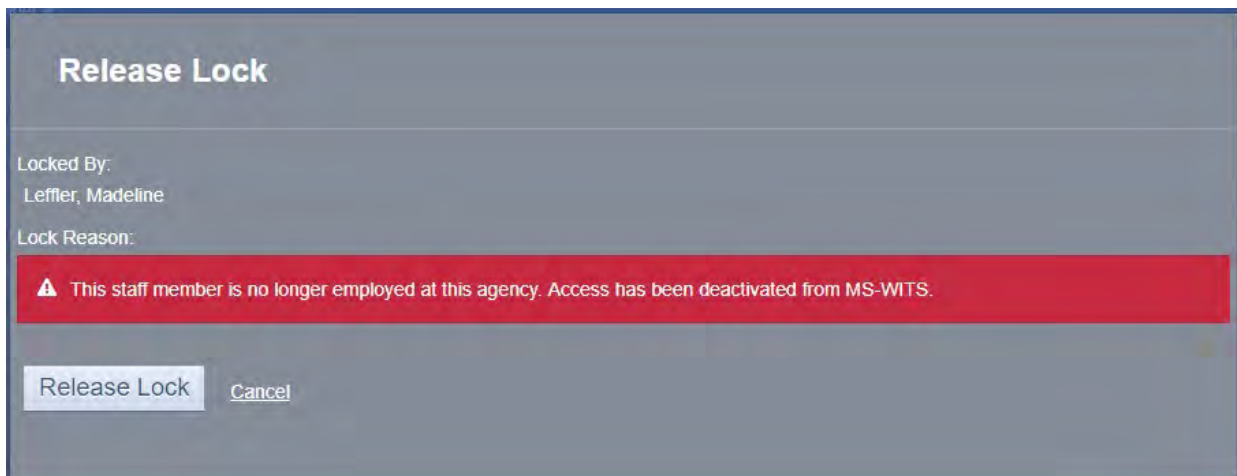
- Cross-Agency Waitlist Management (Full Access)

Agency Roles

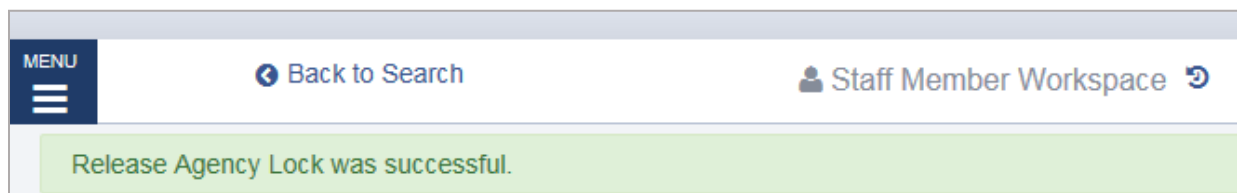
- Agency Billing
- Client Diagnosis (Full Access)
- Release To Billing
- Billing Encounter List
- Clinical (Full Access)

Buttons: 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.



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



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



Troubleshooting Help for Staff Management

Use Case: Account in Use

Message: "Your Account is Already in Use"

Solution: End IP System Session

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

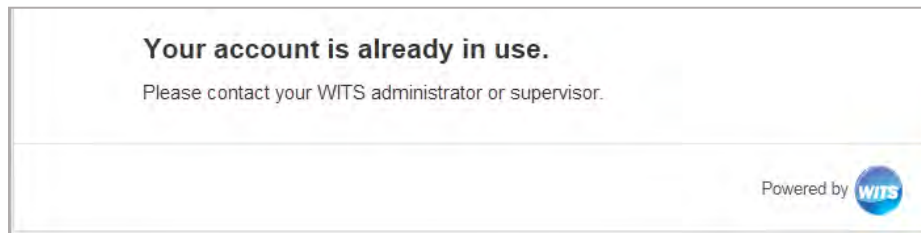


Figure 4-25: Account is already in use message

Option 1: Staff Members List

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

	Ashley	Jones	Administrative Agency	Active	ashley.jones@feisystems.com	ajones
<div> End IP Session Lock Agency Access Reset Credentials View Profile </div>						
					kolby.kinsey@feisystems.com	kolby.kinsey
	Madhuri	Peyyavula	Administrative Agency	Active	Madhuri.Peyyavula@feisystems.com	mpeyyavula 04/01/2015

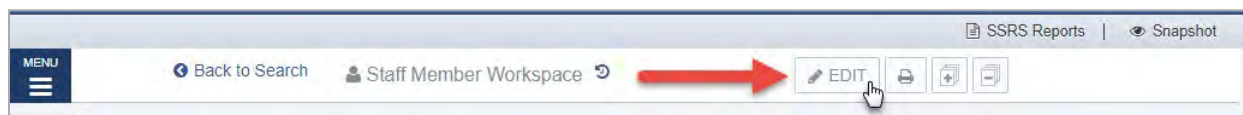
2. Ask the staff member to try logging in again.

Option 2: Staff Member Profile

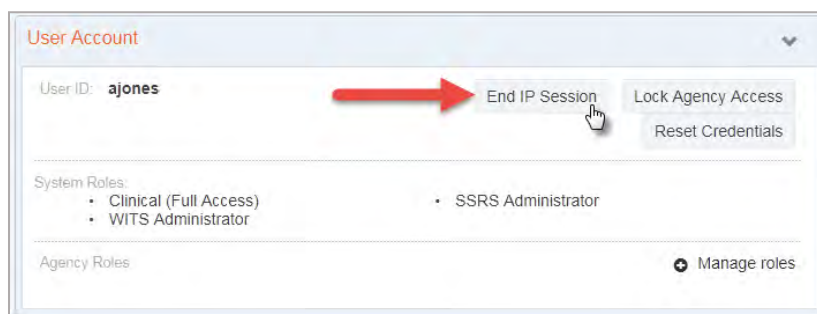
1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **View Profile**.

	Ashley	Jones	Administrative Agency	Active	ashley.jones@feisystems.com	ajones
<div> End IP Session Lock Agency Access Reset Credentials View Profile </div>						
					kolby.kinsey@feisystems.com	kolby.kinsey
	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**.



4. Click **Done Editing**.



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

Use Case: Disabled Account

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

Solution: Enable account

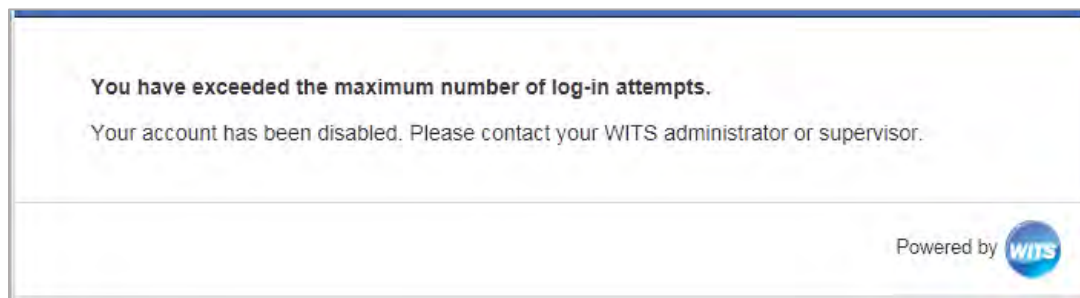
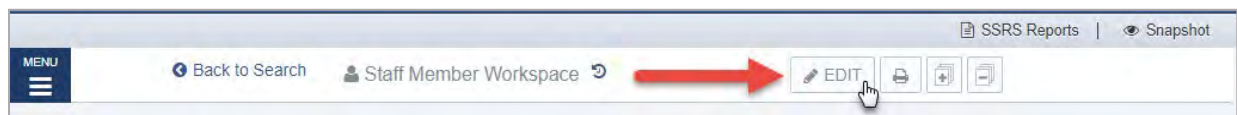


Figure 4-26: You Have Exceeded the Maximum Number of Log-in Attempts

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



2. Click **Edit**.



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



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**.

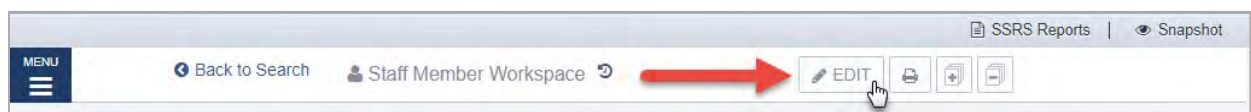


Option 2: Staff Member Profile

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**.

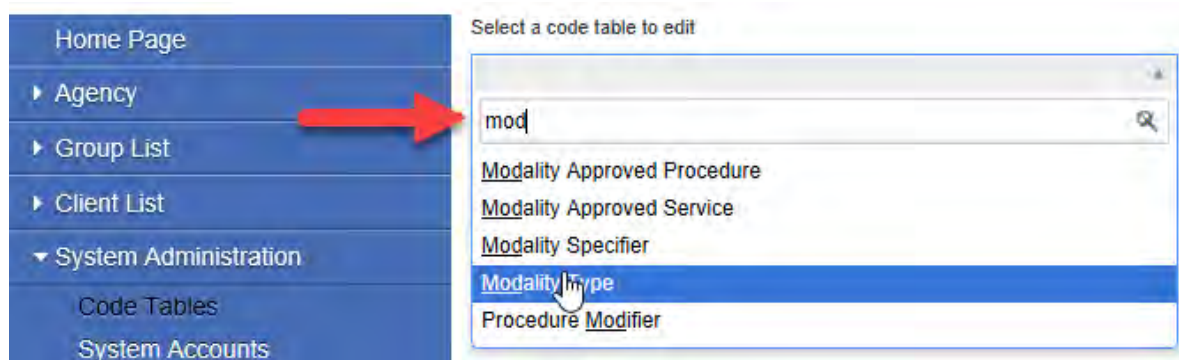


Figure 5-1: Code Tables Search screen

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
	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	

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
Evidence Base Practices	Program Setup; Encounter	If collecting Evidence Base Practices (EBPs) on encounters, a list of appropriate practices needs to be added as code table values. Once added to the code table, these practices will be available to select on the Program Setup screen and Encounter screen.
Modality Type List	Program Setup	WITS Standard SOR does not support TEDS reporting, and associated admission/discharge workflow. SOR programs need to have a Modality type that does not require Admission/Discharge. This is determined by the Admission Required field in this code table. Admission Required <ul style="list-style-type: none"> No: Use this value for SOR programs. Yes: Used for non-SOR programs that need admission/discharge workflow to support TEDS reporting.
Modality Specifier	Program Setup	The Modality Specifier named, "Medication Assisted Treatment" (-107), will display a dual list box on encounters, allowing staff to select one or more medication-assisted treatments used for the client. Note: Values displayed in this dual list box are found in the code table named, "Cd Medication Assisted Treatment List".
Medication Assisted Treatment List	Encounter; GPRA Follow-up and Discharge Interviews	This code table has been loaded with values that are consistent with the new SOR GPRA tool. The GPRA Discharge and Follow-up alcohol use disorder (AUD) and opioid use disorder (OUD) questions will be prepopulated with the medication information entered in the client SOR encounters across the grant episode, within the past 30 days. This will apply only if the interview is conducted, if the GPRA Discharge or Follow-up interviews are not conducted then the screen is skipped so no need to prepopulate.
Service Location	Program Setup; Encounter	Indicates the Service Location for encounters. The default Service Location values for encounters for a facility (e.g. Office) can be established on the facilities' program setup.
Referral Source	Intake	Indicates the source of the referral (e.g. Self, Justice, etc.)
County	Agency Profile; Intake	List of the State's counties. Used to define the provider agency's county and the client's county.
Procedure	Services	If using encounters, this contains procedures needed to create services that are referenced on the encounter.
Procedure Modifier	Services	Services are defined by a unique combination of Procedure, Procedure Modifier and Service Description. This code table allows the WITS administrators to define modifiers needed to support those unique combinations
Sexual Orientation	Client Additional Information	This code table has been loaded with values that are consistent with the new SOR GPRA tool. Recommend that WITS Administrators do not modify, unless SAMHSA publishes new values in the future.

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

Code Table: Modality Type

Modality Type List (Export)

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

New

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

Domains
Substance Abuse

Selected Domains

Finish

New

Modality Type Code

Description

State Code

Sort Order

Effective Date

Expiration Date

Restrict Concurrent Enrollment Ind

Residential Modality Indicator

Bed Management Modality Indicator

GPRA Modality

TEDS Code

Program Category

Admission Required

Created By

Created Date

Updated By

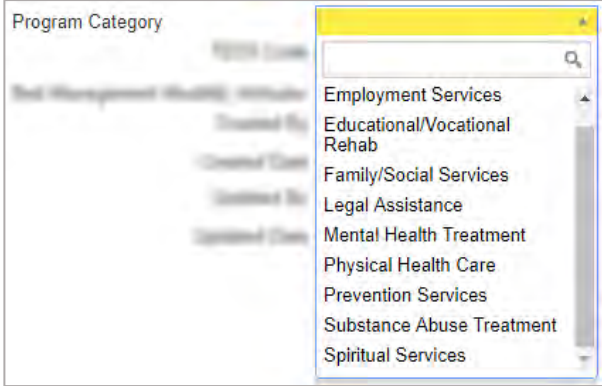
Updated Date

Domains
Substance Abuse


Selected Domains

Table 5-2: Modality Type Code Table fields

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

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


Standard SOR QA
19.0.0

Provider Agency, Provider Facility

Jones, Ashley
Logout

SSRS Reports | Snapshot

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
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

Modality Specifier Code

Description

State Code

Sort Order

Effective Date

Expiration Date

Report To State Ind

Created By

Created Date

Updated By

Updated Date

New

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 diagnoses for this client. 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	Yes	1
Buprenorphine	Yes	1
Naltrexone	No	
Extended-release Naltrexone	Yes	1

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	No	
Extended-release Naltrexone	Yes	1
Disulfiram	No	
Acamprosate	No	

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

Search

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

Home Page	Search Criteria Show Search																																																																																																										
Agency Group List Client List System Administration Code Tables System Accounts Activity Management Adjudication Rule Services Rates H835 Management H999 Management H837 Management HL7Management SPARS Batch SPARS Batch Errors System Info Agency Oversight Assignment Config Editor Federal Poverty Update Alert Types Master Patient Index Reports Support Ticket	<div>Medication Assisted Treatment List (Export)</div> <table border="1"> <thead> <tr> <th>Actions</th> <th>ID</th> <th>Description</th> <th>Sort Order</th> <th>Effective Date</th> <th>Expiration Date</th> <th>Medication Assisted Treatment Category</th> <th>GPRA Medication Assisted</th> <th>Created By</th> <th>Created Date</th> <th>Updated By</th> <th>Updated Date</th> </tr> </thead> <tbody> <tr> <td></td> <td>1</td> <td>Naltrexone - Injectable (e.g., Vivitrol®)</td> <td></td> <td>11/27/2018</td> <td></td> <td>Opioid Use Disorder</td> <td>Extended-release Naltrexone</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> <td>User, System</td> <td>10/3/2019 1:54 PM</td> </tr> <tr> <td></td> <td>2</td> <td>Naltrexone - Oral</td> <td></td> <td>11/27/2018</td> <td></td> <td>Opioid Use Disorder</td> <td>Naltrexone</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> <td>User, System</td> <td>10/3/2019 1:54 PM</td> </tr> <tr> <td></td> <td>3</td> <td>Buprenorphine Implant (Probuphine)</td> <td></td> <td>11/27/2018</td> <td></td> <td>Opioid Use Disorder</td> <td>Buprenorphine</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> </tr> <tr> <td></td> <td>4</td> <td>Buprenorphine - Injectable (e.g., Sublocade)</td> <td></td> <td>11/27/2018</td> <td></td> <td>Opioid Use Disorder</td> <td>Buprenorphine</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> </tr> <tr> <td></td> <td>5</td> <td>Buprenorphine - Oral/Sublingual/Buccal (e.g., Suboxone, buprenorphine/naloxone)</td> <td></td> <td>11/27/2018</td> <td></td> <td>Opioid Use Disorder</td> <td>Buprenorphine</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> </tr> <tr> <td></td> <td>6</td> <td>Methadone</td> <td></td> <td>11/27/2018</td> <td></td> <td>Opioid Use Disorder</td> <td>Methadone</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> </tr> <tr> <td></td> <td>7</td> <td>Naltrexone - Injectable (e.g., Vivitrol®)</td> <td></td> <td>11/27/2018</td> <td></td> <td>Alcohol Use Disorder</td> <td>Extended-release</td> <td>User, System</td> <td>9/12/2019 11:21 AM</td> <td>User, System</td> <td>10/3/2019 1:54 PM</td> </tr> </tbody> </table> <div> New </div> <div> <div>ID</div> <div>Description</div> <div>Sort Order</div> <div>Effective Date</div> <div>Expiration Date</div> <div>Medication Assisted Treatment Category</div> <div>GPRA Medication Assisted</div> <div>Created By</div> </div>											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
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																																																																																																

Code Table: Evidence-Based Practice List


Standard SOR QA
19.0.0

Provider Agency, Provider Facility

Jones, Ashley
Logout

SSRS Reports | Snapshot

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
HL7Management
SPARS Batch
SPARS Batch Errors
System Info
Agency Oversight Assignment
Config Editor
Federal Poverty Update
Alert Types
Masler 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
stasone	Fasone, Susan	Active	stasone@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@hawaiiantel.net	Unknown
VFonoimoana53	Fonoimoana, Victor	Deactivated	vik@bbcoahu.org	Unknown

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

MENU	System Account Search			
	Search Advanced Search			
Home Page	Search...			
State Waitlist	Showing 1-50 of 50			
Agency	Previous 1 Next			
Group List	Select Columns Select View			
Clinical Dashboard				
Client List				
System Administration				
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
	End IP Session Lock System Access Reset Credentials View Profile		Letfler@feisystems.com
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 Search System Account Workspace **EDIT**

System Account

Agency Accounts »

ms.clinical Active

Luna
Ninetails
Jones
ashley.jones@feisystems.com

Roles

- Cross-Agency Waitlist Management (Full Access)

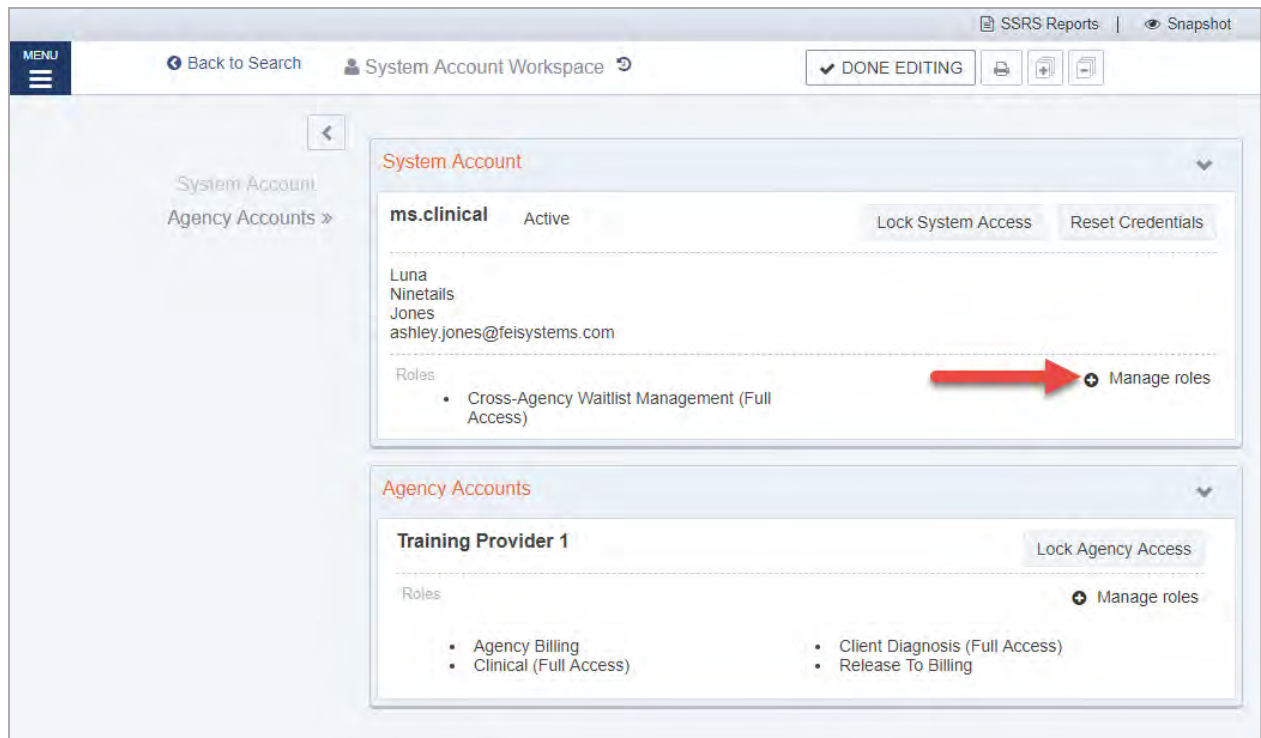
Agency Accounts

Training Provider 1

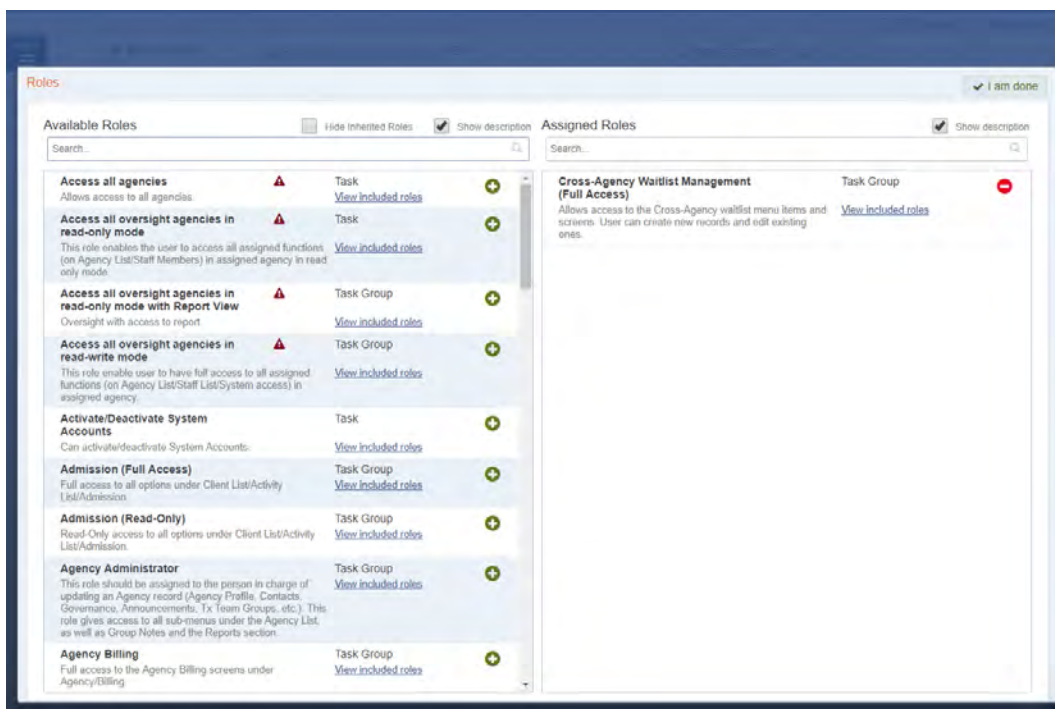
Roles

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

5. Click **Manage Roles**.



6. Assign or remove roles as needed.



7. Click **I am done**.
8. On the System Account Workspace screen, click **Done Editing**.

User Controlled Configuration List



Where: *System Administration > User Controlled Configuration List*

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

- Instance Wide Help Link
- Context Specific Help Link

Edit Help Links

Instance Wide

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

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

Actions	Property Name	Property Value
	ApplicationParameter.AccountManagerName	Marion Sarthy Haas
	ApplicationParameter.AccountManagerDomainUsername	feimsarhy
	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	feimsarhy
	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 18.38.1 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:

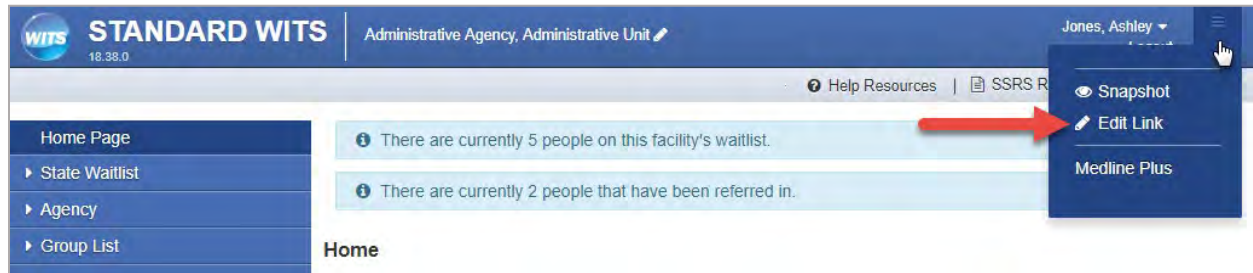
Actions	Property Name	Property Value
	ApplicationParameter AccountManagerName	Marion Sarhy Haas
	ApplicationParameter AccountManagerDomainUsername	feimsarhy
	ApplicationParameter UspsZipCodeCheckerUrl	https://tools.usps.com/go/ZipLookupActionInput ac...
	System.HelpLink	www.help.com
	System.HelpText	
	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.

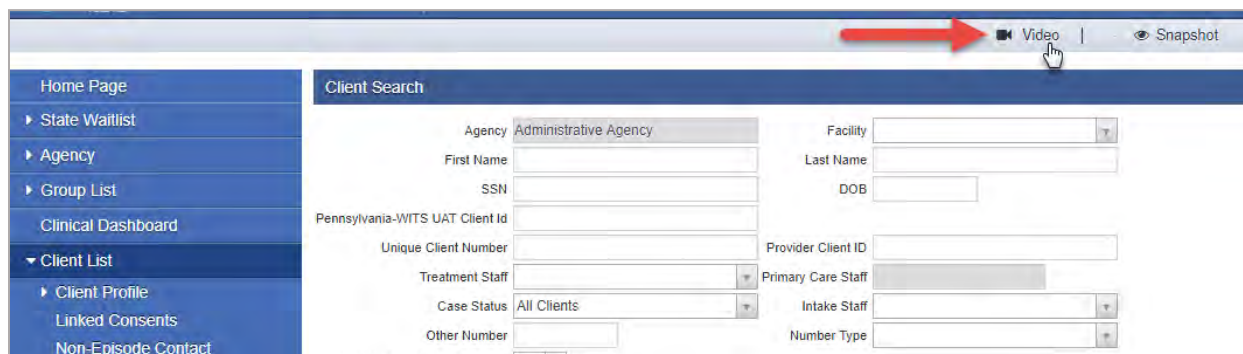
1. To enable a context specific video/help link, navigate to the desired system screen, and link the **Edit Link** in the main header. Clicking this link will open a separate window.



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 a title bar 'Help Resource'. Below it, there are two input fields: 'Form State' with the value 'ClientList' and 'Url' which is currently empty. A red arrow points to the 'Url' field. At the bottom left is a green 'Save' button, and at the bottom right is a '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**.

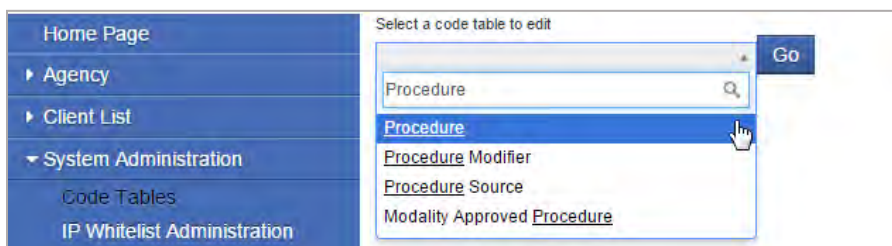


Figure 5-5: Code Tables search screen

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.

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.

The screenshot shows a navigation menu on the left with 'Alert Types', 'Master Patient Index', 'Reports', and 'Support Ticket'. The main content area has a header bar with a 'New' link highlighted by a red arrow. Below the header, there is a text prompt: 'Click "New" to create a new record. Or click "Review" to edit the item.' and a 'Procedure Code' input field.

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

The screenshot shows the 'Add New Procedure Code' form. It has a header bar with a 'New' link. Below the header, there is a text prompt: 'Adding a new item'. The form contains the following fields: 'Procedure Code' (text input), 'Description' (text input), 'State Code' (text input), 'Sort Order' (text input), 'Effective Date' (date picker), 'Expiration Date' (date picker), 'Created Date' (text input), and 'Procedure Source' (dropdown menu). At the bottom right, there are three buttons: 'Cancel', 'Save', and '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.

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

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

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

- Service #**: [Empty]
- Description**: [Empty]
- Measure Type**: [Empty]
- Rendering Provider Required**: Yes
- Date Span Allowed**: Yes
- Effective Date**: [Empty]
- Expiration Date**: [Empty]
- Add-On Level**: None
- Start/End Time Required**: No
- Created Date**: [Read-only field]
- GPRA Service**: [Empty]
- Procedure Code**: [Empty]
- Modifier 1-4**: [Empty]
- Domains**: Substance Abuse
- Selected Domains**: [Empty]

Buttons at the bottom right: Cancel, Save, Finish.

Figure 5-10: Service Profile screen

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

Service Profile

Service # 1 Procedure Code H0001-Alcohol And/Or Drug Assessment

Description Alcohol and Drug assessment Modifier 1

Measure Type Unit Modifier 2

Rendering Provider Required Yes Modifier 3

Date Span Allowed Yes Modifier 4

Effective Date 4/1/2019

Expiration Date

Add-On Level None

Start/End Time Required No

Created Date 9/23/2019 7:48 A

GPRA Service 4020-Alcohol/Drug Testing

Domains Selected Domains

Substance Abuse

Administrative Actions

[Client Service Cap](#)

Cancel Save Finish

Figure 5-11: Completed Service Profile

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

System Administration

Code Tables

System Accounts

Activity Management

Adjudication Rule

Services

Rates

System Info

NOMS Extraction

Agency Oversight Assignment

Service List (Export)

[Add New Service](#)

Actions	Svc. #	Service Description	Procedure	Add-On Level	Measure Type	Render Prov Req	Allow Date Span	Start/End Time Required	Effective	Expiration
	11	Medically Monitored Inpatient Detoxification (Activity 823A)	823A	None	Duration	Yes	Yes	Yes	1/1/2017	
	18	Psychotherapy	823A/HF	None	Unit	Yes	Yes	No	7/7/2017	
	12	Medically Monitored Short-Term Residential Treatment (Activity 823B)	823B	None	Duration	Yes	Yes	Yes	1/1/2017	
		Long-Term Residential Treatment (Activity 823C)	823C	None	Duration	Yes	Yes	Yes	1/1/2017	
		Inpatient Detoxification (Activity 834A)	834A	None	Duration	Yes	Yes	Yes	1/1/2017	

Profile Clone

Figure 5-12: Clone Service

Master Patient Index



Where: [System Administration](#) > [Master Patient Index](#)

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

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

Figure 5-13: Master Patient Index screen

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

Actions	Id	Client Full Name	Birth Date	Gender	SSN	Medicaid Id	Unique Client #	State Client Id	Agency
	1038	2, Deeksha Test	6/1/1987	Female	213-12-5678		200006018756780		Administrative Agency
	1092	Ackles, Jensen	3/1/1978	Male	654-32-9874		A24203017898740		MAZZITTI AND SULLIVAN COUNSELING SERVICES INC
	1093	Asteraceae	8/1/1999	Female	012-34-		A23608019956780		Administrative Agency
	1020	Bear, Boo-Boo	3/4/1958	Transgender – Unknown	030-50-1958		B60003045819580		EAGLEVILLE HOSPITAL
	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.

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

Figure 5-15: SPARS Batch Search/List screen

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

Table 5-6: Batch Status Definitions

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

Home Page	SPARS Batch Search
Agency	Batch Status: ALL Batch Name: <input type="text"/>
Group List	Process Date: <input type="text"/>
Client List	<input type="button" value="Clear"/> <input type="button" value="Go"/>
System Administration	SPARS Batch Listing (Export) <input type="button" value="Start ATR SPARS Batch"/> <input type="button" value="Start Services SPARS Batch"/>
Code Tables	
System Accounts	
Activity Management	
Adjudication Rule	
Services	
Rates	
H835 Management	
H999 Management	
H837 Management	
HL7 Management	
SPARS Batch	
SPARS Batch Errors	

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

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

Table 5-7: SPARS Batch Listing columns

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

SPARS Batch Errors



Where: System Administration > SPARS Batch Errors

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

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

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

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

The screenshot shows the 'Standard SOR QA' interface. On the left is a sidebar with navigation links: Home Page, Agency, Group List, Client List, System Administration (with sub-links like 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), and Reports. The main content area is titled 'SPARS Batch Errors Search' and includes search filters for Current Record Status (set to 'Rejected'), Batch Number (2530), Agency, and Client Number. Below the search filters is a table titled 'SPARS Batch Errors Listing (Export)'. The table has columns: Actions, Batch #, Current Record Status, Agency, Grant, SAIS Client ID, Unique Client #, Interview Type, Interview Date, Error Code, and Error Message. There are four rows of error data. A red arrow points to the 'Fix' button in the 'Actions' column of the second row, which has an error code of 'FamilyandLivingRule12'.

Actions	Batch #	Current Record Status	Agency	Grant	SAIS Client ID	Unique Client #	Interview Type	Interview Date	Error Code	Error Message
[Pencil Icon]	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
[Pencil Icon] Fix	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
[Pencil Icon]	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".
[Pencil Icon]	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.tblDISC' column does not allow nulls. INSERT fail. The

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

- 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.

- In the Client List, point to the pencil icon in the Actions column and click **Activity List**.
- From the Client Activity List, locate the interview to fix and update the record based on the identified error message.
- 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 navigation bar includes the WITS logo, version 19.6.0, and the text 'Standard SOR QA'. The user is logged in as 'Jones, Ashley' with a 'Logout' button. The left-hand menu is expanded, showing 'Reports' as the selected option. The main content area is titled 'Report Catalog' and features a search bar with the text 'Report Title Contains:' and a 'Go' button. Below the search bar, the reports are listed in a table with two columns: 'Title' and 'Access'. The reports are categorized into four groups: Access, QA/QC, Miscellaneous, and Security. The 'GPRA Interview Data' report is highlighted with a red box and a red arrow pointing to it.

Title	Access
Agency Client Movement	Access
Program Client Movement	
Referrals in by Agency	
Referrals out by Agency	
Program Enrollment Counts	QA/QC
Client List by Program	
Agency/Facility Client Terminations	
Unfinished Client Activities	
Client Profile Data	Miscellaneous
Combined Note Data	
WITS Data Dictionary	
Encounter Data	
GPRA Interview Data	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**.

The screenshot shows the 'Standard SOR QA' interface. On the left is a navigation menu with options: Home Page, Agency, Group List, Client List, System Administration, Reports, and Support Ticket. The main area is titled 'GPRA Interview Data'. It contains search fields for FFY, FQ, Budget Year, and Grant (set to 'SOR'). Below these fields are three buttons: 'On Screen' (blue), 'Export' (blue), and 'Cancel' (red).

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

The screenshot shows the 'Standard SOR QA' interface with the 'On Screen' button clicked. The main area is titled 'GPRA Interview Data'. It includes a purpose note: 'Purpose: To report raw GPRA interview data. NOTE: Many fields are NOT shown on this screen in order to improve the performance of this report. Please click the 'Export' button, then either 'Open' or 'Save' to view all of the data using Microsoft Excel.' Below this is a 'Report Criteria' section with a filter for 'Grant: SOR'. The main content is a table of interview data.

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.



WITS Standard SOR QA 19.6.0 | Provider Agency, Provider Facility | Jones, Ashley | Logout

SSRS Reports | Snapshot

Home Page | Agency | Group List | Client List | System Administration | Reports | Support Ticket


Export

GPRA Interview Data

Purpose: To report raw GPRA interview data. NOTE: Many fields are NOT shown on this screen in order to improve the performance of this report. Please click the 'Export' button, then either 'Open' or 'Save' to view all of the data using Microsoft Excel.

Report Criteria
Grant: SOR

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



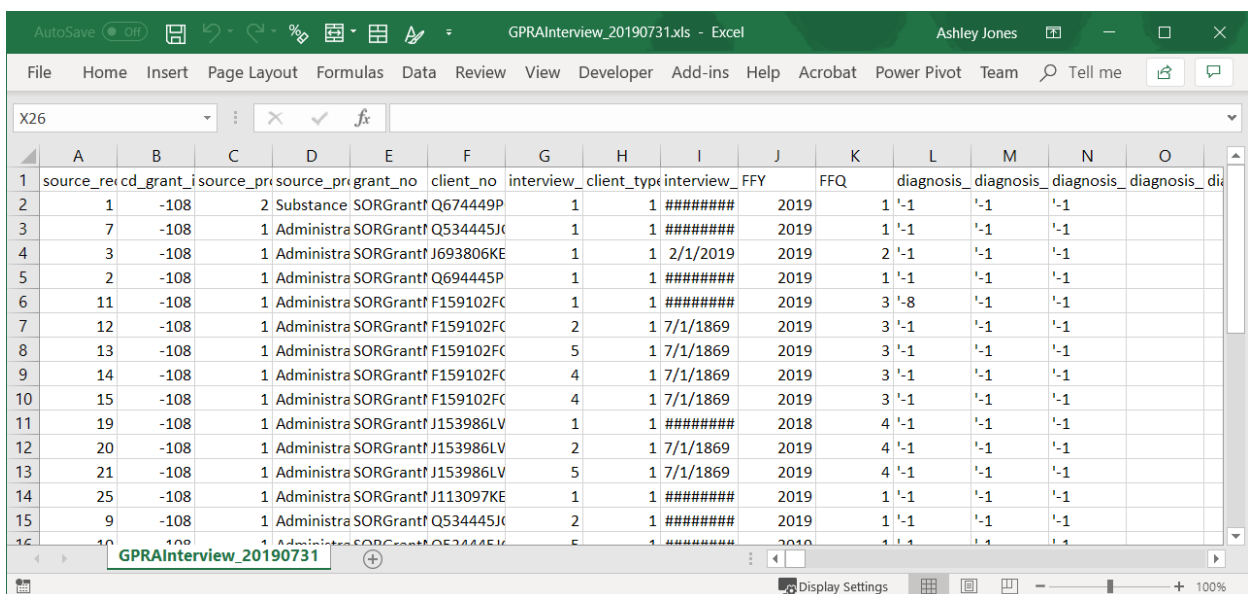
GPRA Interview Data

Purpose: To report raw GPRA interview data. NOTE: Many fields are NOT shown on this screen in order to improve the performance of this report. Please click the 'Export' button, then either 'Open' or 'Save' to view all of the data using Microsoft Excel.

Report Criteria
Grant: SOR

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

GPRAInterview_201...xls Show all



AutoSave Off | Ashley Jones | GPRAInterview_20190731.xls - Excel

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X26

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	source_rei	cd_grant_i	source_pr	source_pr	grant_no	client_no	interview	client_type	interview	FFQ	FFQ	diagnosis	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	

GPRAInterview_20190731

Display Settings 100%

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

★ Favorites | Settings

Home | Reports | Grant Episode Details

Grant Type: SOR Unique Client Number: Q923166M1061344

100% Find | Next

Grant Episode Details

Episode Key	Agency Name	Facility Name	Unique Client Number	Program Description	Grant Type	Enrollment Period	Interview Type	Interview Date	Current Episode Status
Q923166M1061344	Provider 1	Facility 1	Q923166M1061344	State Opioid Response (SOR)	SOR	07/07/2019	Intake	07/07/2019	Active
	Provider 1	Facility 1	Q923166M1061344	State Opioid Response (SOR)	SOR	07/07/2019	6-Month Follow Up	08/02/2019	Active
	Provider 2	Facility 1	Q923166M1061344	State Opioid Response (SOR) Grant	SOR	08/02/2019			Active

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