



FEI Systems



Standard SOR

*WITS Basics User
Guide*

Applies to:

WITS Version 18.0+

WITS Customers

Last Updated August 2019

WITS Customers

Standard SOR

Preface

The content of this document is provided for informational use only. This document is presented “as-is” and material contained in this document, including screen captures, URL and other website links or references may change. In addition, actual WITS Training and/or Productions site(s) may vary based on the unique system settings established per customer.

Intended Audience

This user guide has been prepared for all WITS users. Topics covered include login information, basic navigation features, system conventions, screen formats, and basic troubleshooting tips.

System Requirements

WITS is a web-based application accessed through an Internet (web) browser with 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 and above (**recommended**)

i 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. See *Pop-up Blocker Settings* on page 31 for more information.

Customer URL Links

Training Site: <https://ms-training.witsweb.org/>

Production Site: <https://ms.witsweb.org/>

i 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.**















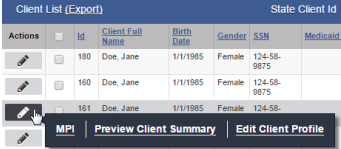
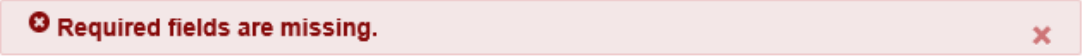
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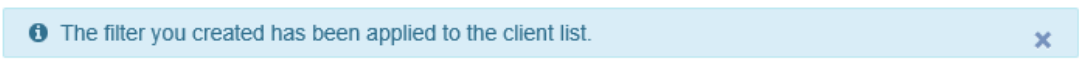

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Part 1: System Icons


WITS Prime Screens

Action Buttons		Data Fields	
	Cancels the current action and returns to the previous screen.		Mandatory field: MUST have data in order to save record.
	Saves data entered and remains on the current screen.		Read-only: System-generated field; for display only and cannot be edited.
	Saves data entered and returns to the section start page.		Optional field: Will not affect completion or saving of record.
	Navigate through the screens in each section (left and right arrow buttons).		Missing Required field: Enter data before Save or Finish.
	Clears all criteria from search fields.		Required for State Reporting: Record may be saved but will not be complete.
	Run the search screen using the criteria entered in the search fields.		
	Moves data from one mover box to another (mover buttons).		
Action Links			
		Clicking on a column heading will reorganize the table alphanumerically from 1-Z and then Z-1.	
		The Administrative Actions group box includes one or more related command link(s) for users to select.	
		On list screens, in the Actions column, hover over the Pencil icon and select from the available links.	
System Notifications			
Error: The red notification message indicates an error on the screen. WITS will not allow the user to leave or save the page until the stated error is addressed.			
			

Informational: The blue notification message informs users that something has occurred.

 The filter you created has been applied to the client list. 

Warning: The yellow notification message warns the user that entered data falls outside of a certain parameter. The record can still be updated.

 This client record is in a different facility. Your current context has been changed. 

Enhanced Architecture (EA) Screens

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





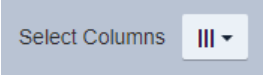


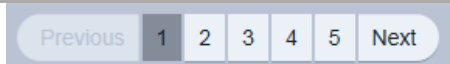
Icon	Description	Icon	Description
	Pencil Icon: Pointing to the icon will display available options to click.		Table View: Presents data in a table format.
	Export: Allows the user to export results.		Panel View: Presents data in a panel-by-panel view.
	Column Selector: Allows the user to select the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

Table 1-2: Workspace Screen Icons/Buttons









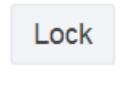


Icon	Description	Icon	Description
	Edit: Click to enable editing for the screen. Otherwise, the panels on screen will be read-only.		
	Add: Allows the user to add data to the panel or section.		Remove: Allows the user to delete information in the panel or section.
	Edit: Allows the user to edit information 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 1-3: Workspace Screen Data Fields




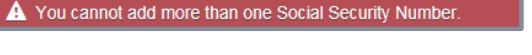

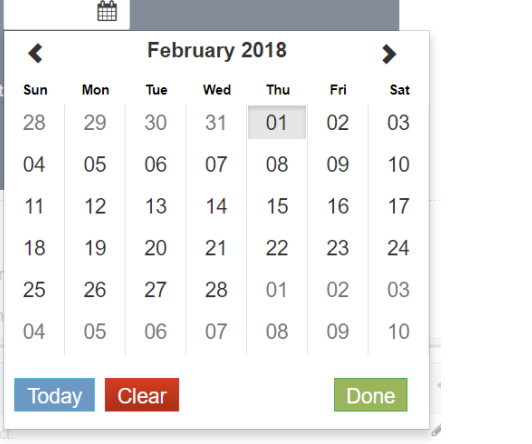
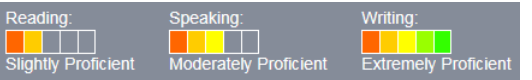
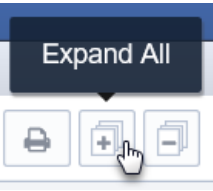
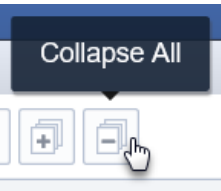

Field	Description
	Required Field: Required fields are marked with a red line on the right side. This field must be completed to save the screen/panel.
	Optional Field: This field may be left blank.
	Drop-down field: Select one option from the list.
	Error Message: The error message is localized and 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 1-4: Workspace Screen, Other Icons/Buttons

Icon	Description	Icon	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.		

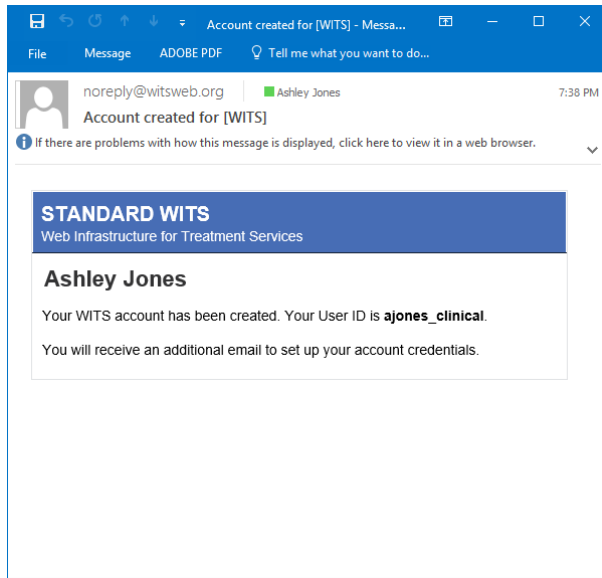
Part 2: System Access

First Time Logging In

Once your system or agency administrator has created your account in WITS, you will receive two (2) email messages from noreply@witsweb.org. The first email will include your User ID and the second email will contain a link to set up your credentials. Please note that this link will expire 24 hours after the email was sent. After 24 hours, please contact your system administrator to reset your credentials and a new link will be emailed to you.

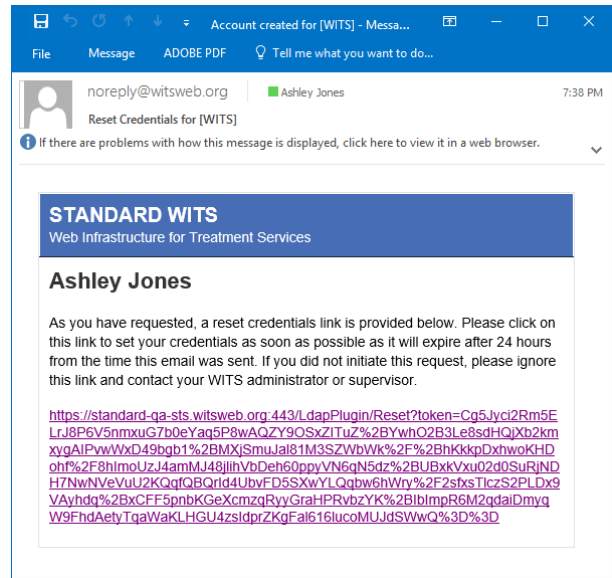
Account Created Email

- Locate your User ID



Reset Credentials Email

- Click the link



Note: The Reset Credentials link expires 24 hours after the email is sent. If the link has expired, please contact your system administrator to reset your credentials and a new link will be emailed to you.

Log In and Set your Credentials (First Time Users)

1. Open the email with the subject line, "Account created for [WITS]" and locate your User ID. Keep this email open for reference as you will need your User ID to log in after setting your credentials (which is covered in the steps below).
2. Open the email with the subject line, "Reset Credentials for [WITS]" and click the **link**. This will open the Reset Credentials webpage.
3. On the Reset Credentials webpage (see Figure 2-1), enter the information as shown in Table 2-1 below.

Table 2-1: Reset Credentials fields

Field	Description
Display Name	Read-only field displaying your last name and first name.

Field	Description
Email	Read-only field displaying your primary email address.
Security Question	Select a question from the drop-down list. Note: Your Security Question will be used to help reset your credentials if you've forgotten your password or pin. Please see the <i>Error! Reference source not found.</i> section Error! Bookmark not defined. for more information.
Answer	Type the answer to your selected Security Question. Note: Your answer is case sensitive.
Password	Your Password must have at least six (6) characters and contain at least three (3) of the following: <ul style="list-style-type: none"> • Uppercase letters • Lowercase letters • Numbers • Punctuation Note: Your Password and Pin must be different. Note: These Password and Pin requirements may differ based on the settings established for your Training and/or Production site(s).
Confirm Password	Retype your Password.
Pin	Your Password must have at least six (6) characters and contain at least three (3) of the following: <ul style="list-style-type: none"> • Uppercase letters • Lowercase letters • Numbers • Punctuation Note: Your Password and Pin must be different. Note: These Password and Pin requirements may differ based on the settings established for your Training and/or Production site(s).
Confirm Pin	Retype your Pin.

STANDARD WITS
Web Infrastructure for Treatment Services

Reset Credentials

Display Name
Jones, Ashley

Email
ashley.jones@feisystems.com

Security Question
What year did you get married?

Answer

Password

Confirm Password

Pin

Confirm Pin

Save Show Password/Pin

Powered by **WITS**

Figure 2-1: First Time Logging In, Reset Credentials screen

4. Click **Save**.

STANDARD WITS
Web Infrastructure for Treatment Services

Ashley Jones

Your Information has been successfully updated!
You can start using WITS.

Powered by **WITS**

Figure 2-2: Reset Credentials Status screen

5. Continue to the next section and log in using your new Password and Pin.

How to Log In (New and Returning Users)



Where: *Internet Browser > WITS Login Screen*

1. Open an Internet browser then type the URL of your WITS system into the search bar.
2. Acknowledge the system access warning message as shown below and then click **OK**.

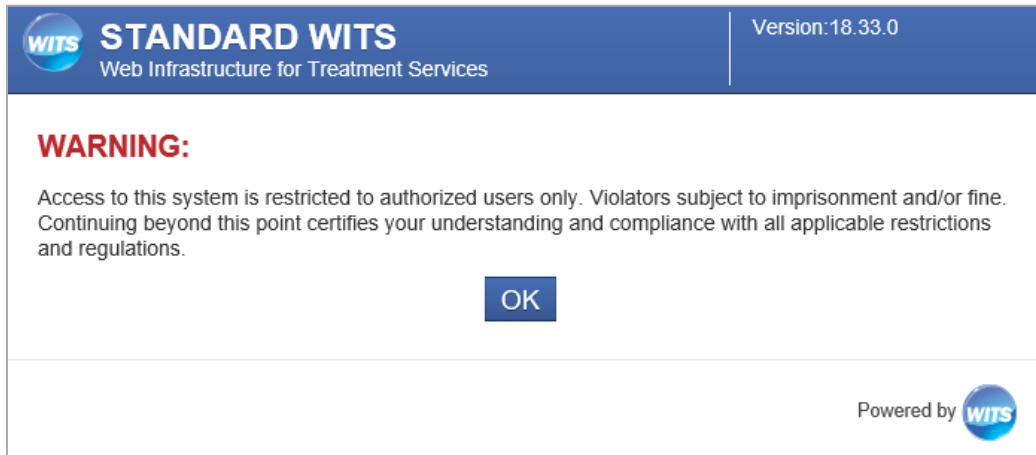


Figure 2-3: System Access Warning Message screen

3. Type your **User ID**, **Password**, and **Pin**.

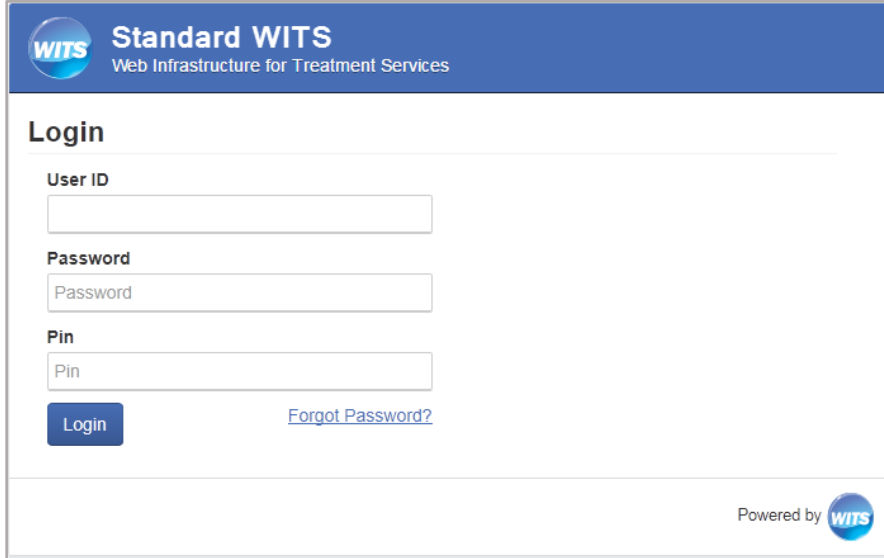


Figure 2-4: Login screen

4. Click **Login**.

Note: Your User ID is not case sensitive.

Help Logging In

Forgot Password Link

1. If you have forgotten your password and/or pin, click **"Forgot Password?"** located on the Login screen.

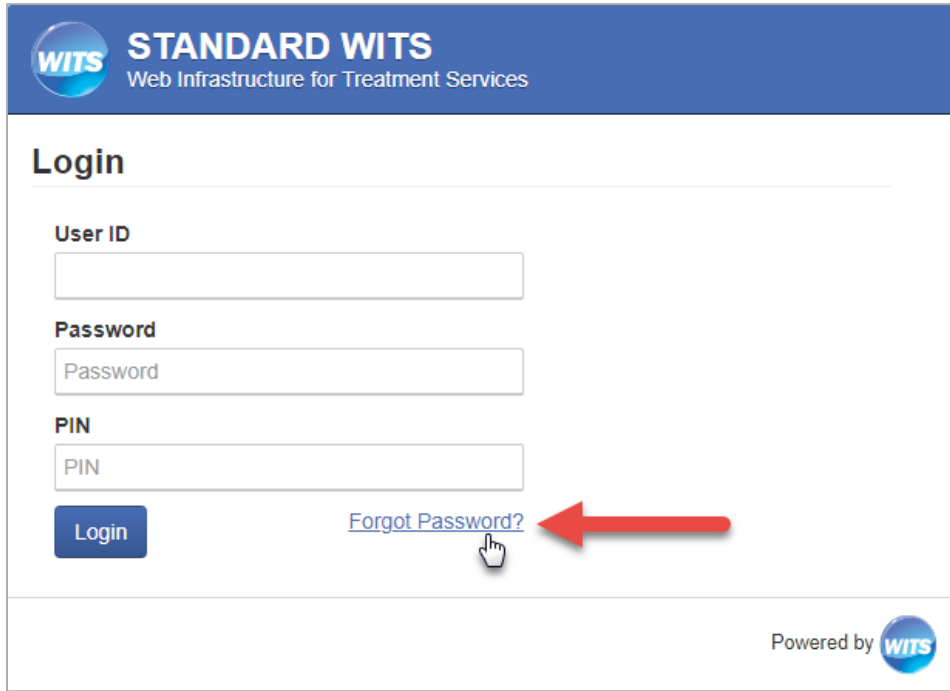


Figure 2-5: Login screen, Forgot Password link

2. Type your **User ID** and then click the **Submit** button.

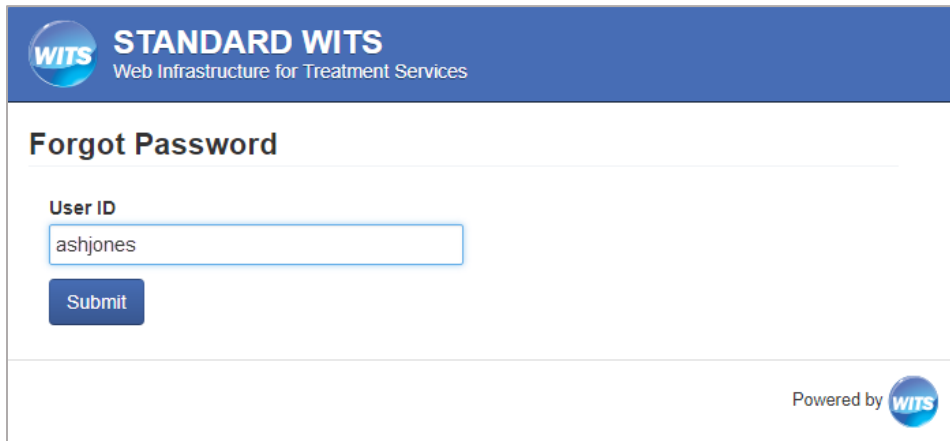


Figure 2-6: Forgot Password screen

3. Type the answer to your Security Question and then click **Submit**.

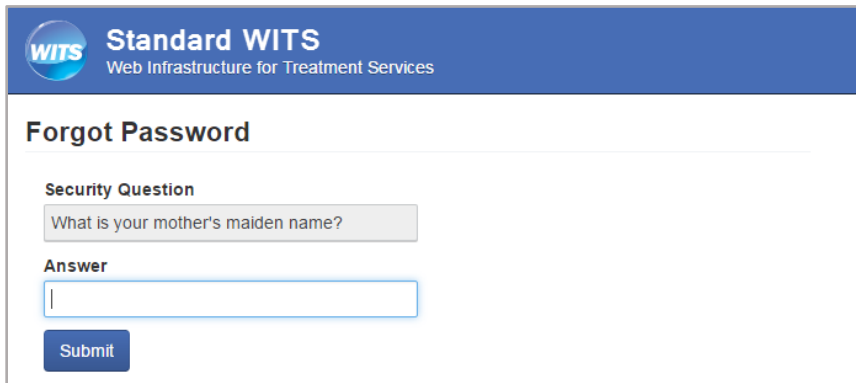


Figure 2-7: Forgot Password screen, Answer field

4. An email will be sent from noreply@witsweb.org to your primary email address on file. This email will include a link to reset your credentials. Please note this link will expire 24 hours after the email was sent.

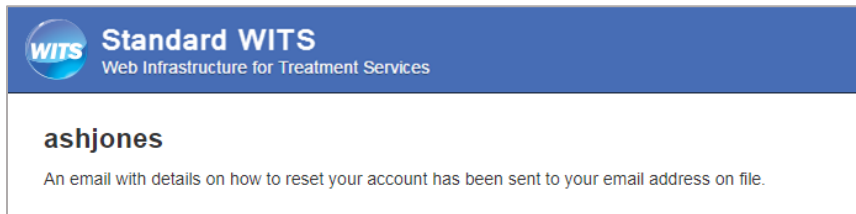


Figure 2-8: Forgot Password, Confirmation screen

5. Check your inbox for an email with subject line "Reset Credentials for [WITS]". Open the email and then click the link provided. This will open the Reset Credentials webpage.

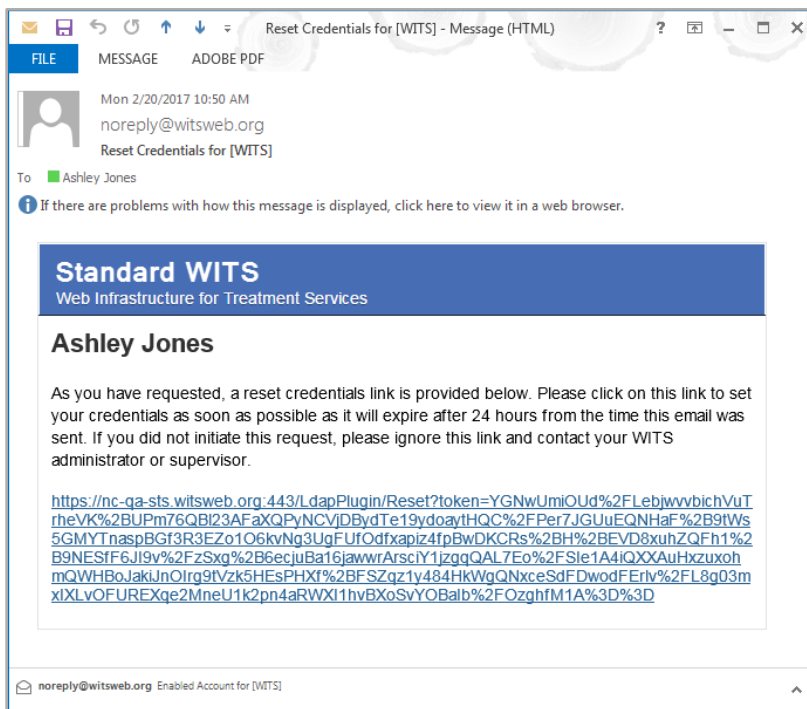


Figure 2-9: Reset Credentials Email

6. On the Reset Credentials webpage, type your new **Password** and **Pin**. Please note you do not have to re-answer your security question when resetting your credentials.

STANDARD WITS
Web Infrastructure for Treatment Services

Reset Credentials

Display Name
Jones, A

Email
ashley.jc

Security
What is

Answer
[Redacted]

Password
[Masked]

Confirm Password
[Empty]

Pin
[Empty]

Confirm Pin
[Empty]

Show Password/Pin

Powered by

Figure 2-10: Reset Credentials screen

7. Click **Save**. A confirmation screen will be displayed.

Standard WITS
Web Infrastructure for Treatment Services

Ashley Jones

Your Information has been successfully updated!
You can start using WITS.

Powered by

Figure 2-11: Reset Credentials, Confirmation screen

How to Log Out

Remember to log out of WITS at the end of the day and anytime your computer is unattended.

1. On the top navigation bar, click **Logout**. This will open the Logout window.

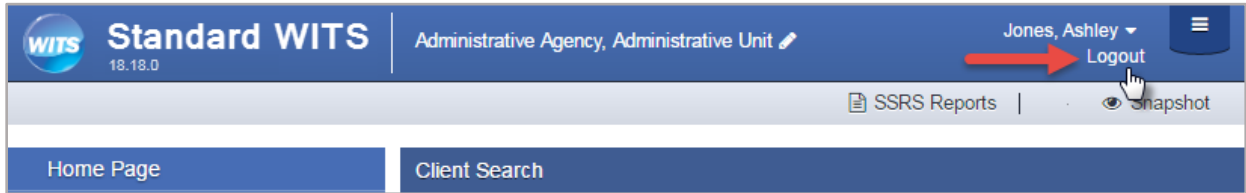


Figure 2-12: Logout button

2. On the Logout window, click **Yes** to log out.



Figure 2-13: Logout confirmation window

Note: If you click “Yes” to log out, but have not completed or saved the information on screen, the system will prevent you from logging out until you either save or cancel your changes first. A warning message will be displayed on screen, similar to the examples shown below.

✘ **Required fields are missing.** ✘

✘ **You must save or cancel your changes first.** ✘

How to Update your Password and Pin

If you are already logged in to WITS, you can change your credentials by following the steps below.

1. On the top navigation bar, click your **display name**. This will open a drop-down menu.

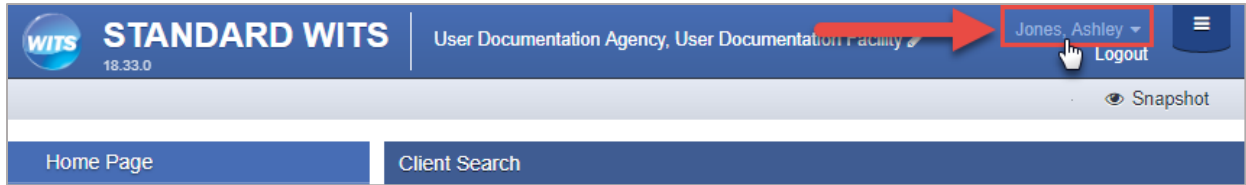


Figure 2-14: Top Navigation Bar, User Display Name

2. Click **Change Credentials**.

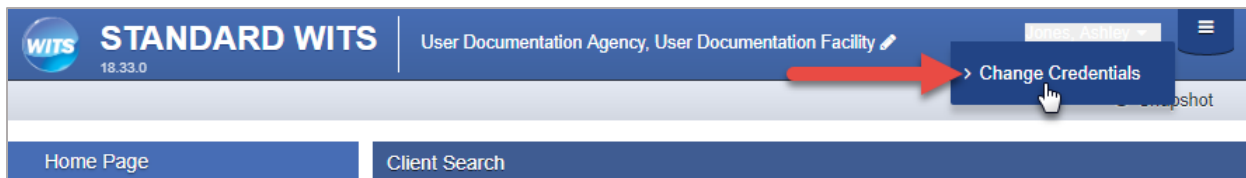


Figure 2-15: Change Credentials link

3. This will open the Change Password screen.

A screenshot of the 'Change Password' screen in the WITS application. The header shows 'STANDARD WITS Web Infrastructure for Treatment Services'. The main content area is titled 'Change Password' and displays the following fields:

- User Name: ajones
- Security Question: What's your father's middle name? (dropdown menu)
- Answer: [Redacted]
- Old Password: [Text input]
- New Password: [Text input]
- Confirm Password: [Text input]
- Old PIN: [Text input]
- New PIN: [Text input]
- Confirm PIN: [Text input]

At the bottom, there is a 'Change' button and a checkbox labeled 'Show Password/PIN'. The footer indicates 'Powered by WITS'.

Figure 2-16: Change Password screen

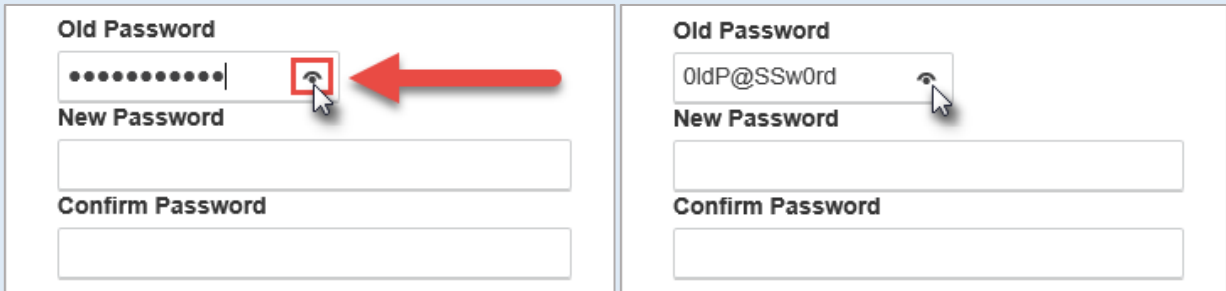
4. On the Change Password screen, complete the fields as listed in the table below.

Table 2-2: Update Password fields

Field	Description
User Name	Read-only field displaying your User ID.
Security Question	Current Security Question is displayed. To update this question, select another option from the drop-down list. Note: Your Security Question will be used to help reset your credentials if you've forgotten your password or pin. Please see the <i>Error! Reference source not found.</i> section Error! Bookmark not defined. for more information.
Answer	Current answer to your current security question is displayed. If you selected a new Security Question, type the answer to that question in this field. Note: Your answer is case sensitive.
Old Password	Type your current password.
New Password	Your Password must have at least six (6) characters and contain at least three (3) of the following: <ul style="list-style-type: none"> • Uppercase letters • Lowercase letters • Numbers • Punctuation Note: Your Password and Pin must be different. Note: These Password and Pin requirements may differ based on the settings established for your Training and/or Production site(s).
Confirm Password	Retype your new password.
Old PIN	Type your current pin.
New PIN	Your Password must have at least six (6) characters and contain at least three (3) of the following: <ul style="list-style-type: none"> • Uppercase letters • Lowercase letters • Numbers • Punctuation Note: Your Password and Pin must be different. Note: These Password and Pin requirements may differ based on the settings established for your Training and/or Production site(s).
Confirm PIN	Retype your new pin.

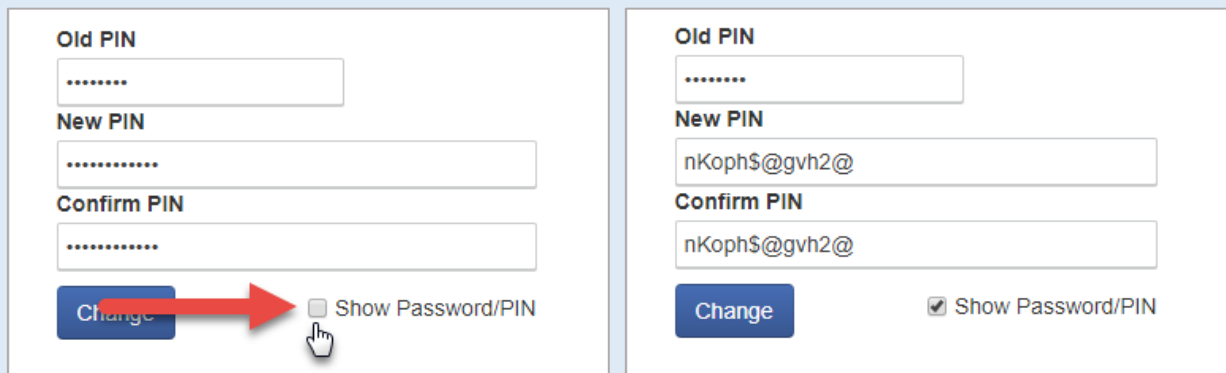
5. Click **Change**.

i Tip: Click the eye icon to view the text entered for an individual field (Note this feature may vary based on your browser).



The image shows two side-by-side screenshots of a password change form. The left screenshot shows the 'Old Password' field with a red box around the eye icon and a red arrow pointing to it. The right screenshot shows the same form with the eye icon clicked, revealing the text 'OldP@SSw0rd' in the 'Old Password' field.

i Tip: Click the **Show Password/PIN** checkbox to view the hidden text.



The image shows two side-by-side screenshots of a PIN change form. The left screenshot shows the 'Old PIN', 'New PIN', and 'Confirm PIN' fields with a red arrow pointing to the 'Show Password/PIN' checkbox. The right screenshot shows the same form with the 'Show Password/PIN' checkbox checked, revealing the text 'nKoph\$@gvh2@' in the 'New PIN' and 'Confirm PIN' fields.

Security Features

- WITS will automatically lock an account if you are signed in to WITS on one computer and then you use a different computer to log in to WITS. To prevent this issue, always remember to log out at the end of the day and anytime your computer is unattended.
- Your Password and Pin must be changed every 60 days.
- You have a maximum of three (3) incorrect login attempts.
- Your account will be disabled after 60 days if you do not log in.

Part 3: User Interface

Navigation

WITS is a sophisticated system designed to accommodate many different types of users and staff. In fact, WITS can be customized by any system administrator to create staff accounts with user-specific access and permissions. This translates into a personalized WITS interface where the end user will only have access to the modules, screens, and functions that have been assigned to them.

Because WITS uses a personalized user interface, end users will not be distracted by additional screens, modules, or functionality, which can reduce productivity and make an interface less user friendly. To obtain the maximum use out of the WITS system, users should be aware of the following interface features and navigation options.

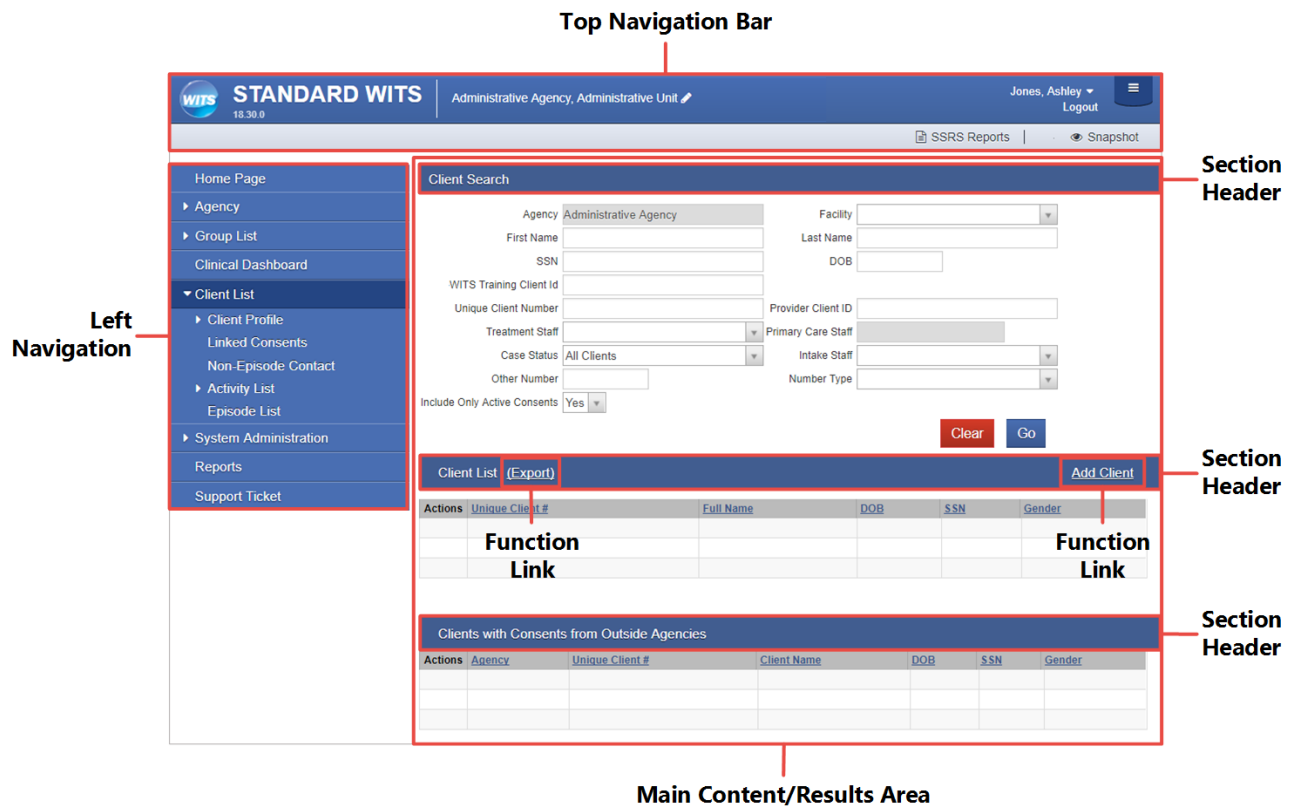


Figure 3-1: WITS User Interface Diagram

1. **Top Navigation Bar:** This area contains information that helps the user know their current context in the system, which includes:
 - **User:** Displays the name of the staff member currently logged into the system.
 - **Agency/Facility Location:** Displays the Agency name and Facility name currently selected.
 - **Client:** Displays client context information.

The Top Navigation Bar also includes additional information and functionality, as shown in Figure 3-2 below.

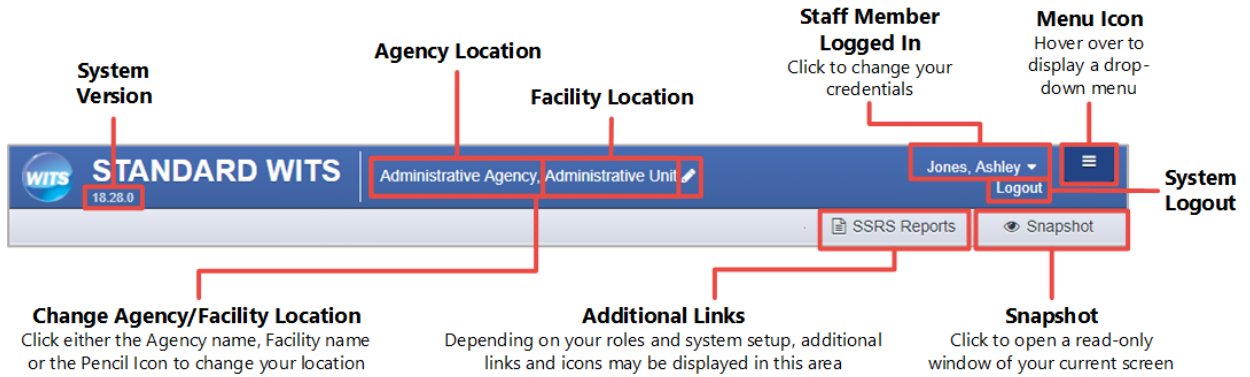


Figure 3-2: Top Navigation and Main Header Features

If you are working with a client and have the client's "file" open in the system, this is referred to as, "being in the context of a client." Your top navigation will then display client context information. This information includes the Client Name, Unique Client Number (UNC), and Case Number if you are within the client's activity list.

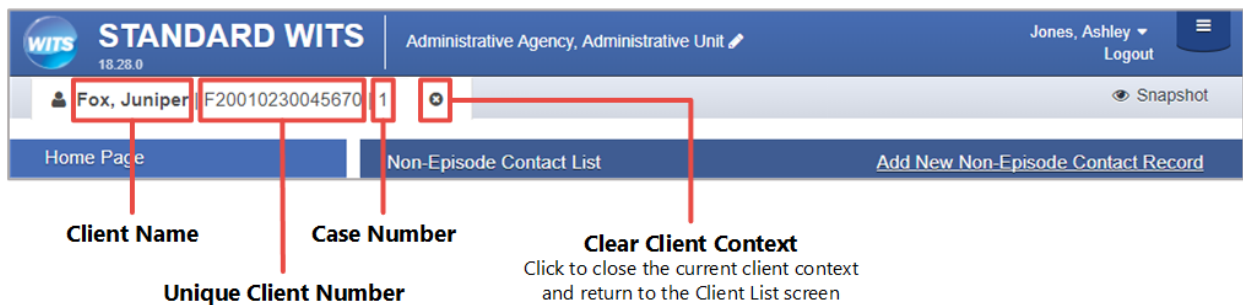


Figure 3-3: Top Navigation with Client Context Information

2. **Left Navigation:** WITS has been designed to follow common behavioral health service workflows. As a result, when using the left navigation (menu), you will note that most of the modules and screens have been logically organized in a manner that makes sense to many Clinical Staff, Case Managers, and Administrators.
3. **Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. Typically, you will first see one of these screens:
 - **Search Screen:** Use the search fields to help find information already entered in WITS.
 - **List Screen:** Displays a list of information/records; search results are also displayed in a List Screen.
 - **Profile Screen:** Use the fields to enter data then click the Save button.
4. **Section Headers:** WITS often contains screens that are actually comprised of several screens, which are identified by section headers. Typical headers indicate Search, List, and Profile (or entry) screens. These section headers are always dark blue and may contain actions such as "Add" or "Export."
5. **Function Links:** If the screen allows you to perform certain actions, such as **Add** or **Export**, the functions appear as underlined links in the Section Header. A hand icon will also appear when your cursor floats over the action item, reminding you that you can click.

How to Change Facilities

Staff members with permission to access other agencies and/or facilities can navigate to those locations by using the **Change Facility** screen.

1. On the top navigation bar, point to your current location, and then click anywhere on the name.

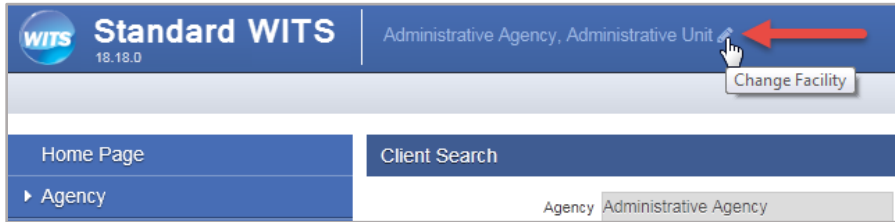


Figure 3-4: Top Navigation bar, Agency/Facility Location

2. On the **Change Facility** screen, click the drop-down menus to select a new Agency and/or Facility.
3. Click **Go**.

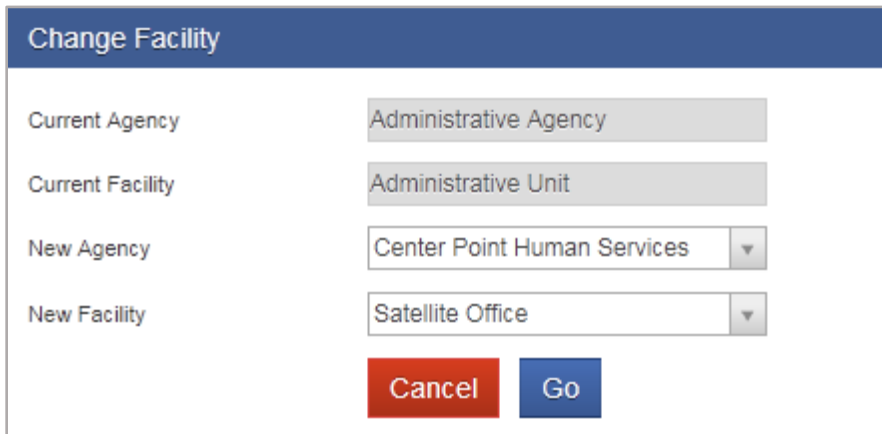


Figure 3-5: Change Facility screen

Types of Screens

Home Page

The Home Page displays general information including Announcements, Alerts, the Scheduler, and Informational Messages. This is the first screen you will see after logging in. You can also access this screen from the left menu by clicking the Home Page button, which is located at the top left of the navigation menu.

The screenshot displays the STANDARD WITS Home Page. At the top, the header includes the WITS logo (version 18.30.0), the user name 'Jones, Sarah A., CCS', and a 'Logout' button. A navigation menu on the left lists 'Home Page', 'Agency', 'Group List', 'Clinical Dashboard', 'Client List', and 'System Administration'. The main content area features a notification banner stating 'There is currently 1 person that has been referred in.' Below this, the 'Home' section contains an 'Announcements' table with one entry: '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'. The 'Alert List' section shows one alert: 'Staff Recertification Due' for 'Jones, Sarah A., CCS' with a due date of 7/12/2017. The 'Scheduler' section shows two scheduled events: one for 'Kabiton, Hosta (Age: 17)' and another for 'Vera, Aloe (Age: 19)', both scheduled for 7/12/2017.

Figure 3-6: Home Page

Search Screen

Search screens allow you to search for items that have already been entered into the system. Search results are then displayed in the List screen. The more information entered in the search fields, the more restrictive the search. Search screens are identified with the **Go** and **Clear** buttons.

- **Go** initiates the search.
- **Clear** will remove all search criteria in the search fields.

TIP • Search screens will always have these buttons:

A screenshot of a 'Client Search' form. The form has a dark blue header with the text 'Client Search'. Below the header, there are several search fields arranged in two columns. The left column includes: Agency (dropdown menu with 'Administrative Agency' selected), First Name (text input), SSN (text input), WITS UAT Client Id (text input), Unique Client Number (text input), Treatment Staff (dropdown menu), Case Status (dropdown menu with 'All Clients' selected), Other Number (text input), and Include Only Active Consents (dropdown menu with 'Yes' selected). The right column includes: Facility (dropdown menu), Last Name (text input), DOB (text input), Provider Client ID (text input), Primary Care Staff (dropdown menu), Intake Staff (dropdown menu with 'Jones, Ashley' selected), and Number Type (dropdown menu). At the bottom right of the form, there are two buttons: a red 'Clear' button and a blue 'Go' button.

Figure 3-7: Client Search Screen

Client Search Tips

Client Name or Number

Use a client's nickname or alternate names in the **First Name** or **Last Name** fields.

Use an **asterisk (*)** to perform a wildcard search.

Examples:

- Find clients whose last name starts with "Jon": Jon*

Client Search			
Agency	Administrative	Facility	<input type="text"/>
First Name	<input type="text"/>	Last Name	Jon* 
SSN	<input type="text"/>	DOB	<input type="text"/>

- Search by the last 4 digits of a client's SSN: *1123

Client Search			
Agency	Administrative	Facility	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>
SSN	*1123 	DOB	<input type="text"/>

Client Birthday or Age

Search within a timeframe by separating the two dates with a **colon (:)**. Search for clients born after a certain date with a **greater than sign (>)**. Search for clients born before a certain date with a **less than sign (<)**.

Examples:

- Find clients born in the year 1990: 1/1/1990:12/31/1990

Client Search			
Agency	Administrative	Facility	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>
SSN	<input type="text"/>	DOB	1/1/1990:12/31/1990 

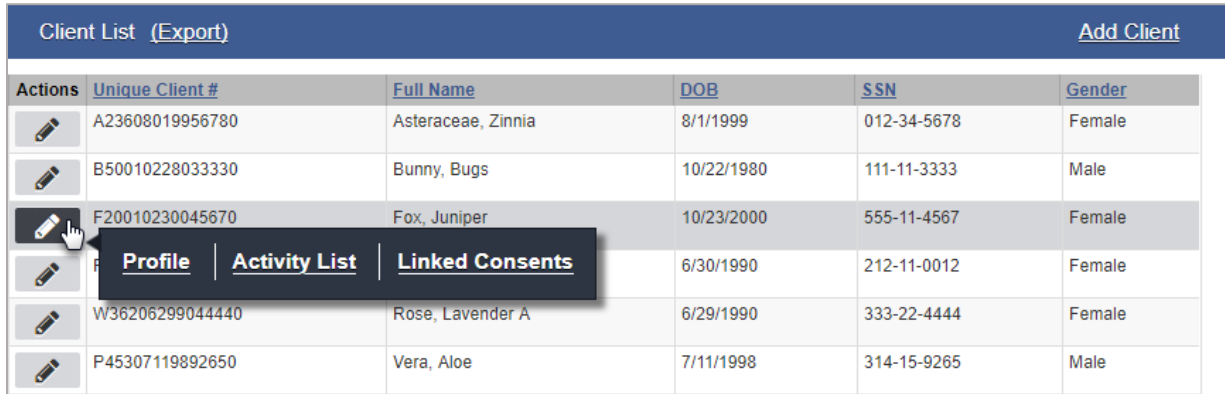
- Find clients born after a certain date: >12/30/1959

Client Search			
Agency	Administrative	Facility	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>
SSN	<input type="text"/>	DOB	>12/30/1959 

List Screen

A search will result in a populated list, with columns showing various data elements. All lists are sortable by clicking on the column header.

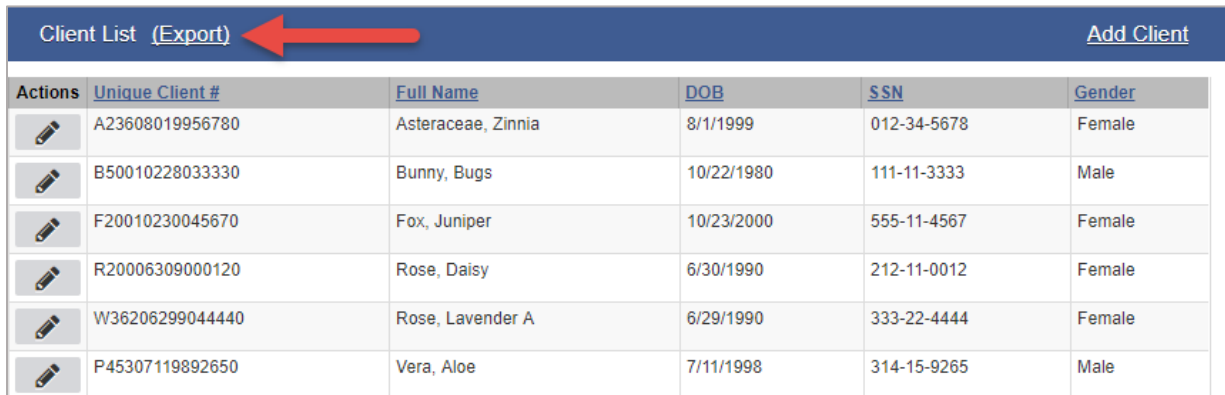
- Many lists have an **Actions** column offering functions that can be applied to a selection from the list.



Client List (Export) Add Client					
Actions	Unique Client #	Full Name	DOB	SSN	Gender
	A23608019956780	Asteraceae, Zinnia	8/1/1999	012-34-5678	Female
	B50010228033330	Bunny, Bugs	10/22/1980	111-11-3333	Male
	F20010230045670	Fox, Juniper	10/23/2000	555-11-4567	Female
		Profile Activity List Linked Consents	6/30/1990	212-11-0012	Female
	W36206299044440	Rose, Lavender A	6/29/1990	333-22-4444	Female
	P45307119892650	Vera, Aloe	7/11/1998	314-15-9265	Male

Figure 3-8: List Screen with Actions column links

- Many lists have an **Export** feature, allowing you to export data displayed on the list into an Excel spreadsheet. Exports are great alternatives to reports.



Client List (Export) Add Client					
Actions	Unique Client #	Full Name	DOB	SSN	Gender
	A23608019956780	Asteraceae, Zinnia	8/1/1999	012-34-5678	Female
	B50010228033330	Bunny, Bugs	10/22/1980	111-11-3333	Male
	F20010230045670	Fox, Juniper	10/23/2000	555-11-4567	Female
	R20006309000120	Rose, Daisy	6/30/1990	212-11-0012	Female
	W36206299044440	Rose, Lavender A	6/29/1990	333-22-4444	Female
	P45307119892650	Vera, Aloe	7/11/1998	314-15-9265	Male

Figure 3-9: List Screen with Export link

Profile Screen

The Profile Screen displays the main content area for data entry. Profile Screens include **Save**, **Cancel**, and **Finish** buttons.

- **Cancel:** returns to the prior screen or list without saving.
- **Save:** reviews any business rules associated with the screen before saving the data, and will keep the user on the current screen.
- **Finish:** saves the data and returns to the previous list screen.

The Profile Screen (Format 1) contains the following fields and controls:

- Prefix:** Dropdown menu.
- First Name:** Text input field.
- Middle Name:** Text input field.
- Last Name:** Text input field.
- Suffix:** Text input field.
- Gender:** Dropdown menu.
- DOB:** Date input field with calendar icon.
- SSN:** Text input field.
- Unique Client Number:** Text input field.
- MPI:** Text input field with value 300625.
- Record Created By:** Text input field.
- Last Updated By:** Text input field.
- Created Date:** Date input field.
- Last Updated Date:** Date input field.
- Date of Death:** Date input field with calendar icon.
- Access Category:** Dropdown menu with value Full Access.
- Has paper file:** Yes/No dropdown menu with value Yes.
- Administrative Actions:** Section containing 'Download c32' and 'View c32' links.
- Buttons:** Cancel (red), Save (green), Finish (blue), and a right arrow (blue).

Figure 3-10: Profile Screen, Format 1

The Profile Screen (Format 2) contains the following fields and controls:

- Ethnicity:** Dropdown menu with value Not Hispanic or Latino.
- Races:** List of options: Asian, Native Hawaiian or Other Pacific Islander, White, American Indian, Unknown. Includes up/down arrows and right/left arrows.
- Selected Races:** Text input field with value Black or African American.
- Special Needs:** List of options: Wheelchair Accessible, Interpreter, None, No Response. Includes up/down arrows and right/left arrows.
- Selected Special Needs:** Text input field.
- Advanced Directives:** List of options: Allow Natural Death, Do Not Intubate, Do Not Resuscitate, Living Will.
- Selected Advanced Directives:** Text input field.
- Effective Date:** Date input field with value 5/28/2014 and calendar icon.

Figure 3-11: Profile Screen, Format 2

i **Tip:** Profile screens will always have these buttons:



Part 4: Data Entry Tips

Field Types

WITS uses colors on certain fields to indicate whether they are required or read-only:

Gender Female

Ethnicity Not Hispanic or Latino

Suffix

Last Updated Date 9/19/2017 11:39 AM

A dark yellow field is required and must be filled in before saving. If the field is empty, an error message will appear.

A light yellow field is required by business rules. The record can be saved without entering the field, but this information will need to be filled-in later.

A white field is not required, and the entry is optional.

A gray field is filled by the system and is read-only. It cannot be edited. It may display information entered in another screen.




Keyboard Shortcut: Press Tab to move between fields.

Textbox

Textboxes allow the user to enter data manually. Some text boxes have specific formats that need to be entered, such as the following:

- **Date fields:** require M/D/YY or M-D-YY format (Years can be entered as a 2- or 4-digit year, but it will be converted to a 4-digit year when saved).
- **SSN and Phone Number fields:** require numbers; dashes are optional and are added automatically when saved.
- **Larger text boxes:** will expand if you pull the lower right corner with your mouse:

General Client
Comments



Drop-down Menu

A Drop-down Menu (also called a drop-down list) is used when only one entry may be selected from a list of values. Typically, these values are controlled by your administrator.

Case Status

Other Number

Include Only Active Consents

Client List [\(Export\)](#)

- All Clients
- Clients with Open Cases
- Clients with Closed Cases
- Clients with No Case History

Mover Box (Dual List Box)

A mover box is used when more than one entry may be selected from a list of values. To choose multiple values from the list, hold down the control key, click the values from the left side, and then click the > button to move the values to the right. To remove values from the selected list, click the value(s) on the right that you want to remove and then click the < button to move them to the left.



Keyboard Shortcut: Hold Ctrl+A to select all options

Races	Selected Races
Asian	Black or African American
Native Hawaiian or Other Pacific Islander	
White	
American Indian	
Unknown	

Mover Box (Dual List box) with a Condition

In some cases, you may be asked to provide a condition (such as a date) to go along with the value you choose. Make sure to enter the appropriate date for each selected value.

Client Information To Be Consented

Expiration Type: + Days

*Expiration type is required for disclosure activities.

Client Information Options	Disclosure Selection
ASAM	Admission (DS, +30)
ATR Eligibility Screen	Client Information (Profile) (DS, +30)
Behavioral Health Assessment	
Client Screening	
Consent	
CONTINUUM Triage™ Assessment	
CONTINUUM™	
DENS ASI Assessment	
DENS ASI Lite	
Diagnosis List	

Part 5: Hints

Snapshot

The Snapshot feature opens a separate window containing a read-only copy of your current screen. This useful tool allows you to access other screens in WITS while still viewing the information within the Snapshot. You can open multiple Snapshots windows simultaneously.

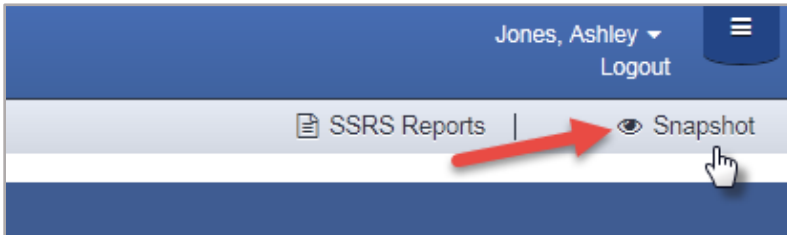


Figure 5-1: Snapshot button

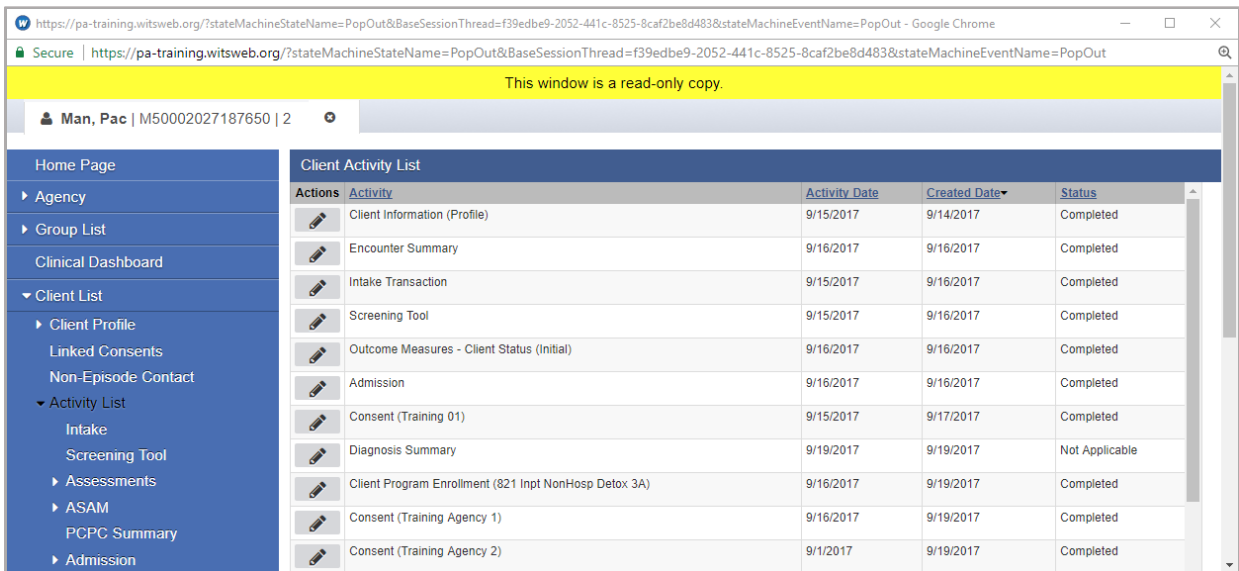


Figure 5-2: Snapshot, read-only window

Print Function

Use your browser's print function to print your screen. Using your mouse, **right-click** on your screen to open a list of options, and then click **Print**.

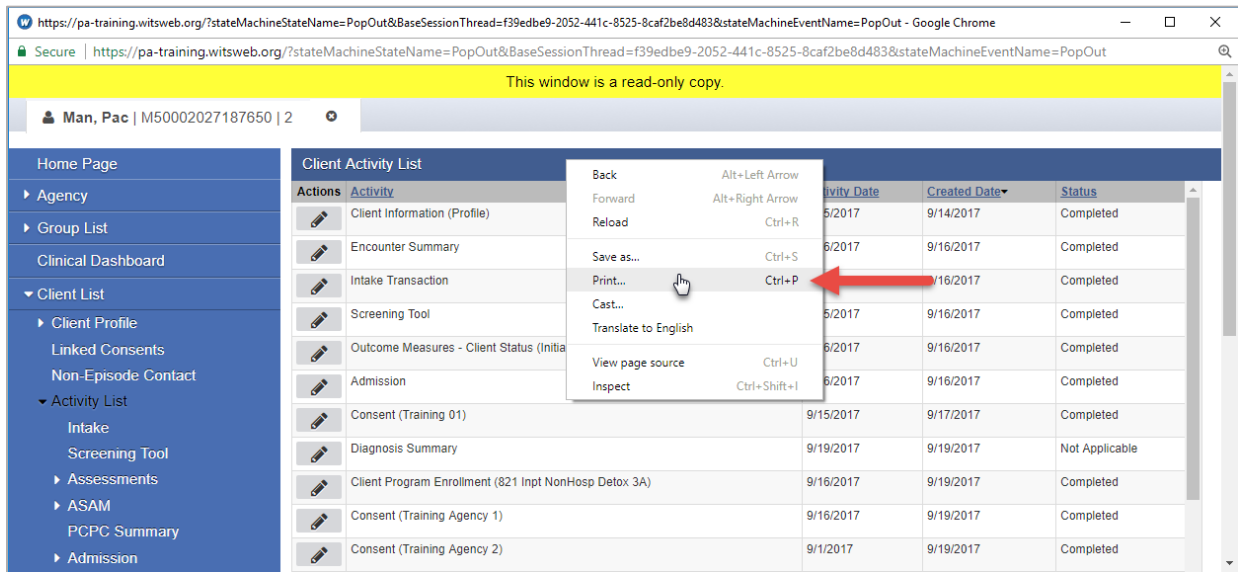


Figure 5-3: Right-click to open Internet browsers Print function

In the print preview, notice that the system saves ink by only printing the main section of the screen.

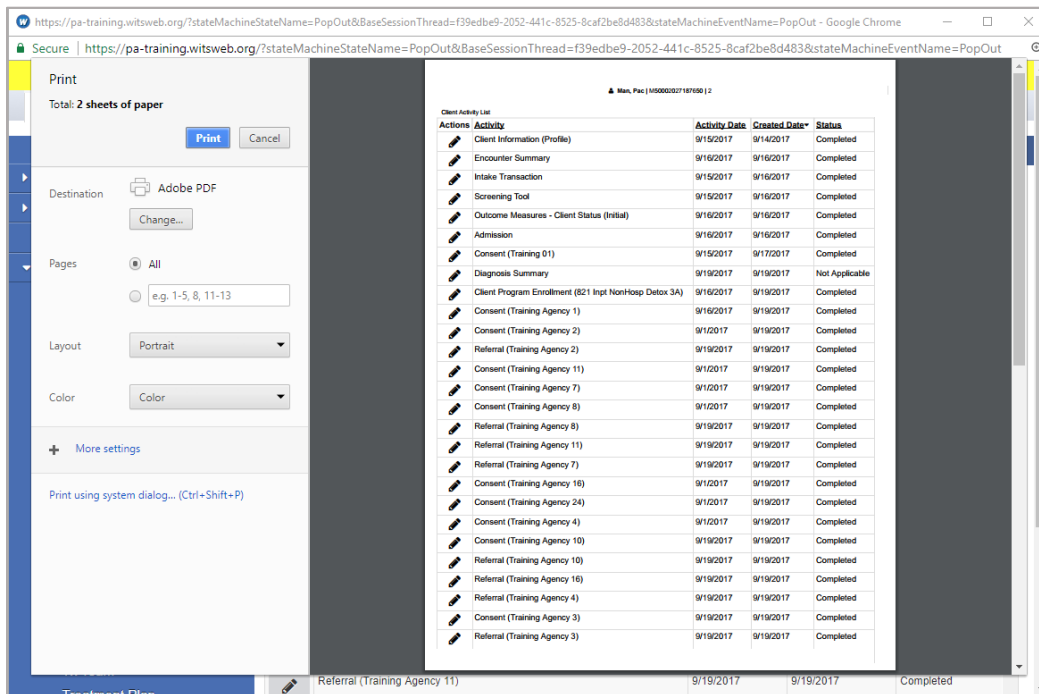
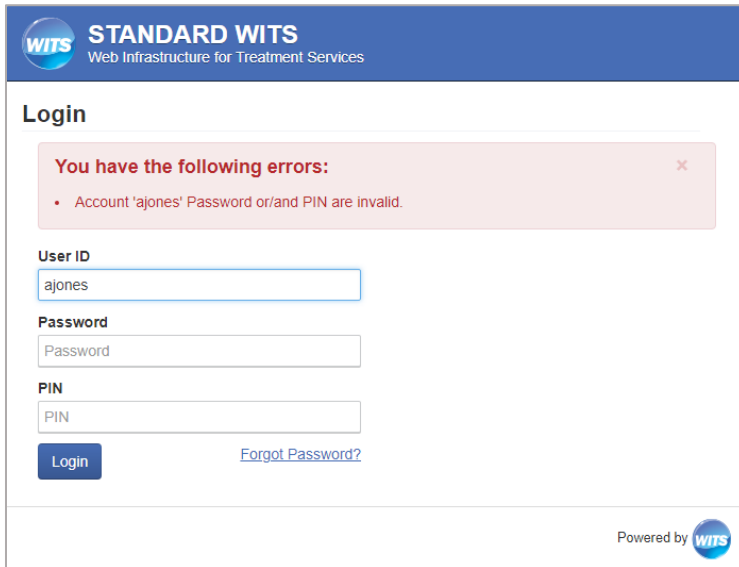


Figure 5-4: Print Preview

Part 6: Frequently Asked Questions & Troubleshooting

Logging In

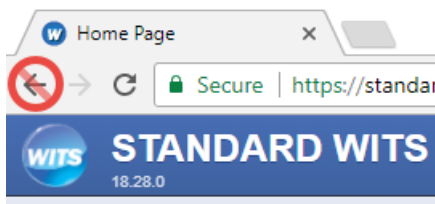
- Question:** How many log in attempts do I have?
 - Answer:** Each user has **three (3)** attempts to log in with their correct password and pin.
 - Tip:** If you are having trouble remembering your login information, click the “Forgot Password?” link to enter your User ID and answer your security question.



- Question:** Will the system automatically log me out?
 - Answer:** If you are logged in, but have not interacted with the site for a certain amount of time, the system will display a message on screen notifying that you are about to be logged out. If you are still using the system, select the option on the message screen to keep your session active. This inactivity duration may vary based on your system settings.

Searching and Entering Information

- Question:** Can I use my browser’s “back” button?
 - Answer:** No. To return to the prior screen, use the left navigation menu and/or left arrow button on screen.



- Question:** I just typed in answers for the fields displayed on screen, but when I clicked “Go”, the information I just entered is not displayed in the list. What happened?
 - Answer:** If you are trying to add new information to the system (e.g., add a new client record, note, etc.), you may have been filling out fields on the Search screen instead of a Profile screen.

Pop-up Blocker Settings

If using both Training and Production sites, pop-ups will need to be allowed from both sites.

The following wikiHow article provides step-by-step instructions for allowing pop-ups from Google Chrome, Internet Explorer, Firefox, and Safari web browsers: <https://www.wikihow.com/Allow-Pop-ups>.

Article Reference: (How to Allow Pop-ups, 2017)

Update Internet Options

Add WITS sites to your browsers Trusted Sites list.

Internet Explorer:

1. Open Internet Explorer and then type the URL of your WITS system.
2. Click the **Tool** button. A drop-down menu will appear.

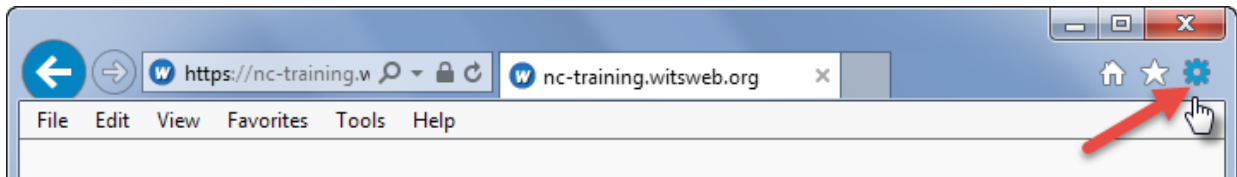


Figure 6-1: Internet Explorer' Tool icon.

3. Click **Internet Options**. The Internet Options window will open.

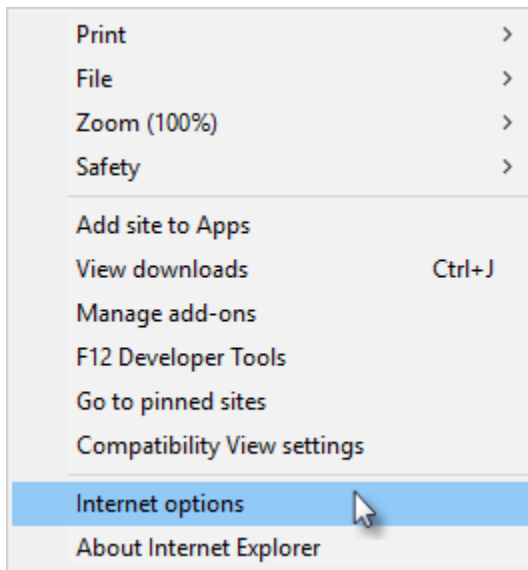


Figure 6-2: Tool's drop-down menu, click Internet Options

4. Select the **Security** tab, click **Trusted Sites**, and then click the **Sites** button. The Trusted Sites window will open.

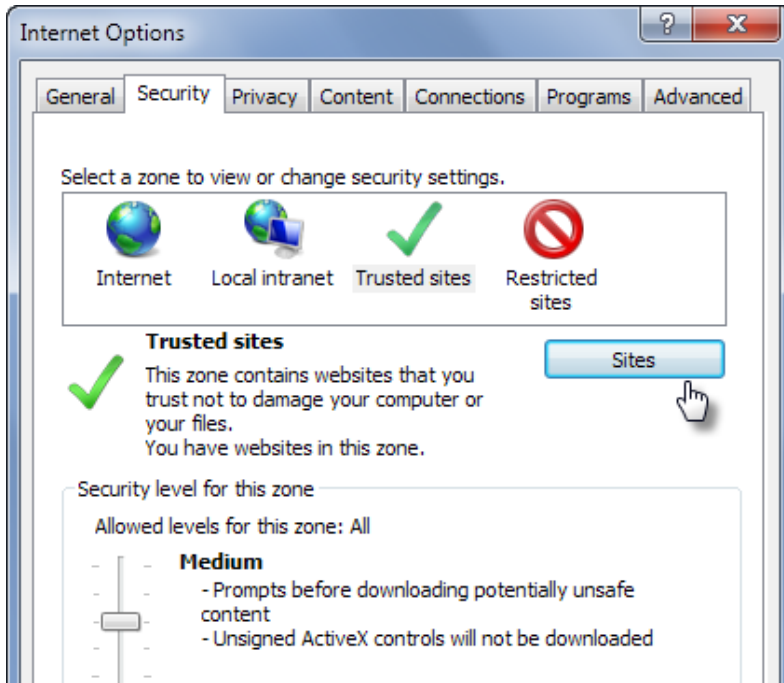


Figure 6-3: Internet Options window, Security tab

5. On the Trusted Sites dialog box, click the **Add** button and then click **Close**.

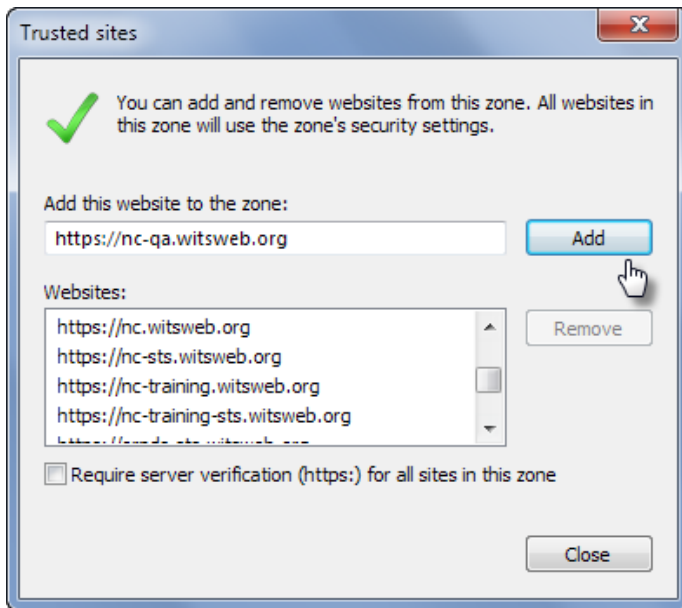


Figure 6-4: Trusted Sites window