



FEI Systems



# MS-WITS

*WITS Basics User  
Guide*

Applies to:

WITS Version 21.3.0+

Mississippi Department of  
Mental Health

Last Updated May 2022

# Mississippi Department of Mental Health

## MS-WITS

### 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 Production 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:

- Google Chrome™
- Microsoft Edge™
- Mozilla® Firefox®
- Apple® Safari®

**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.

### 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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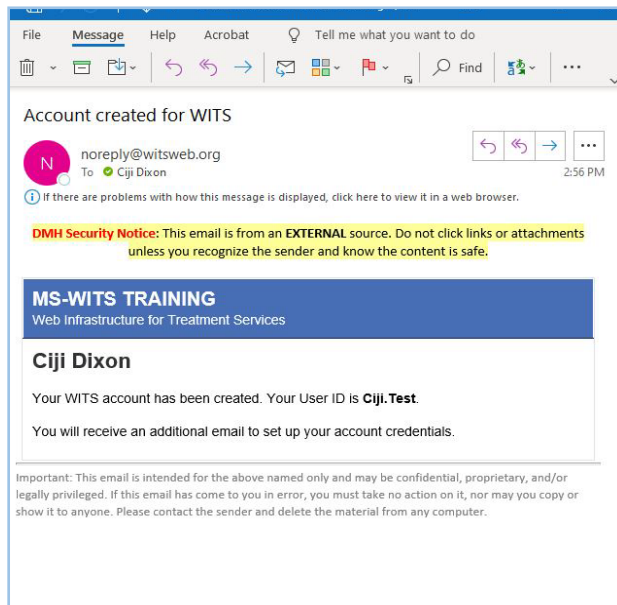
# Part 1: System Access

## 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](mailto: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.

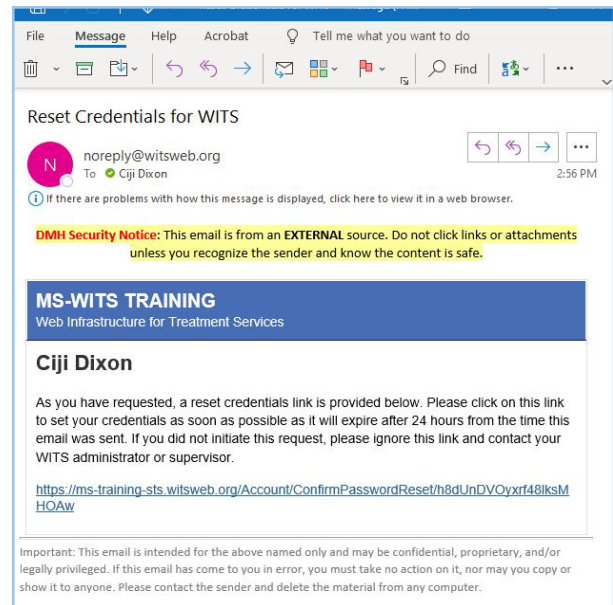
### Account Created Email

- 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 1-1), enter the information as shown in Table 1-1 below.

Table 1-1: Reset Credentials fields

Field	Description
<b>Display Name</b>	Read-only field displaying your last name and first name.
<b>Email</b>	Read-only field displaying your primary email address.

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

**DMH MS-WITS TRAINING**  
Web Infrastructure for Treatment Services

### Reset Credentials

Display Name  
Dixon, Ciji

Email  
ciji.dixon@dmh.ms.gov

Security Question  
▼

Answer  
[ ]

Password  
[ ]

Confirm Password  
[ ]

PIN  
[ ]

Confirm PIN  
[ ]

**Save** Cancel

☐ Show Password/Pin

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

- Once the Reset Credentials page has been completed, click **Save**. Once successfully updating your credentials, you will be prompted to log into WITS.

**DMH MS-WITS TRAINING**  
Web Infrastructure for Treatment Services

## Success

---

You can now log in to [wits](#).

Figure 1-2: Reset Credentials Status screen

- 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. The following images reflect the MS-WITS Training system.
2. Acknowledge the system access warning message as shown below and then click **Continue**.

**MS-WITS TRAINING**  
Web Infrastructure for Treatment Services

**WARNING**

Access to this system is restricted to authorized users only. Violators subject to imprisonment and/or fine. Continuing beyond this point certifies your understanding and compliance with all applicable restrictions and regulations.

**TRAIN**  
Version 21.3.1 | Powered by WITS

Continue

Figure 1-3: System Access Warning Message screen

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

**DMH MS-WITS TRAINING**  
Web Infrastructure for Treatment Services

**Log In**

User ID  
ciji.test

Password  
.....

PIN  
.....

[Forgot Password or Pin?](#)

**Training**

Login

Figure 1-4: Login screen

4. Click **Login**.

---

**Note:** Your **User ID** is not case sensitive.

---

## WITS Login Screens

The login screens are easily identifiable with the type of site labeled as well as different color scheme.

Login screens now display a welcoming background scene when users enter their credentials. We have also moved the instance logo out of the login box to make it more prominent and moved the login button within the bottom bar for easier user experience.

## WITS Production

The login screen for the WITS Production environment will have a blue bar at the bottom of the login section.

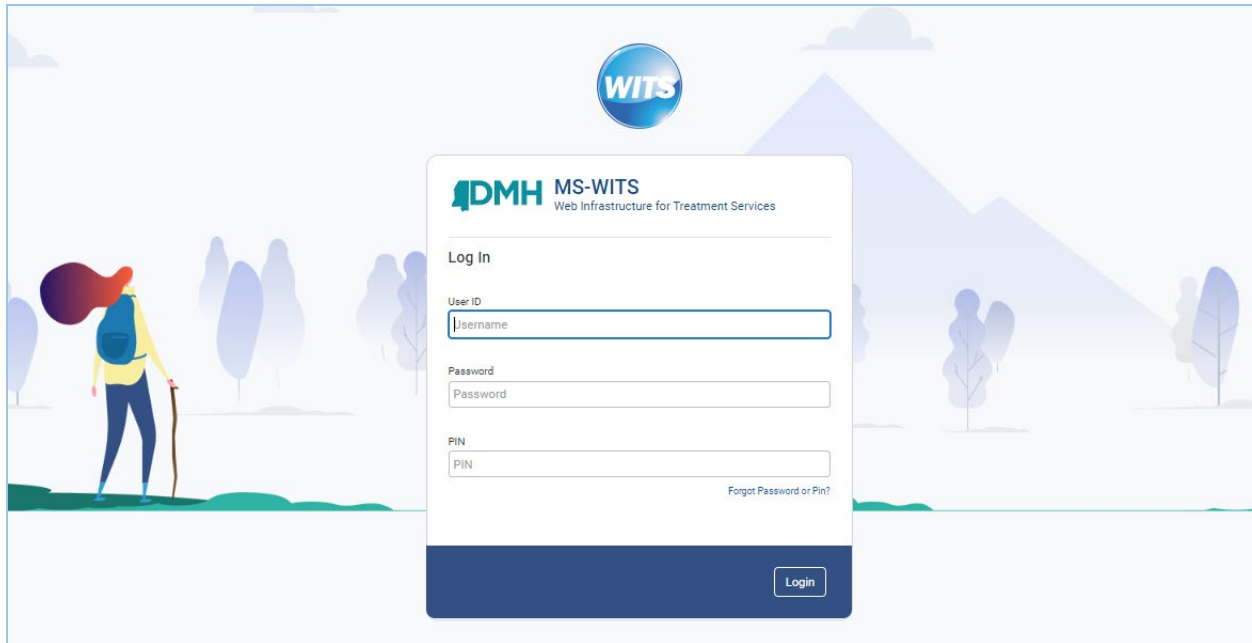
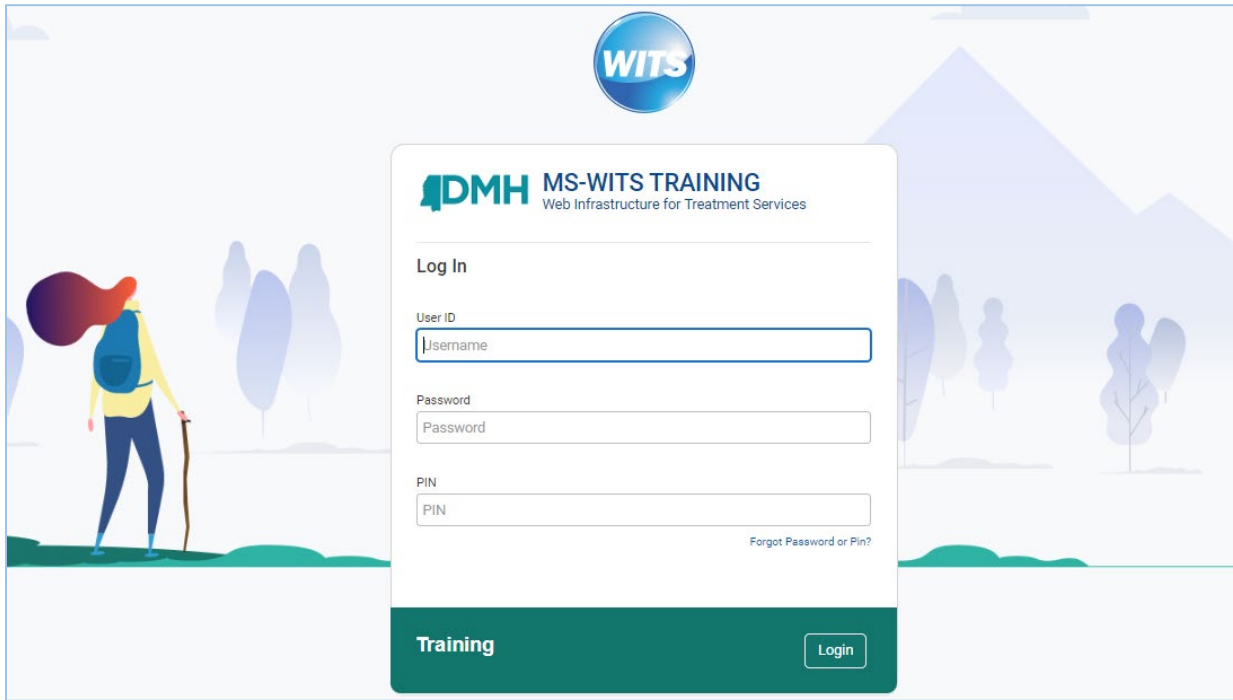


Figure 1-5: Production login screen

## WITS Training

The login screen for the training environment will have a teal bar at the bottom of the login section.



The login screen for the training environment features a teal bar at the bottom of the login section. The background is a light blue gradient with a stylized illustration of a person with a backpack and a walking stick on the left, and a mountain range on the right. The WITS logo is at the top center. The login form is centered and includes the DMH logo, the text "MS-WITS TRAINING" and "Web Infrastructure for Treatment Services", a "Log In" heading, and input fields for "User ID" (containing "Username"), "Password", and "PIN". A "Forgot Password or Pin?" link is located below the PIN field. The bottom of the form has a teal bar with the word "Training" on the left and a "Login" button on the right.

**WITS**

**DMH** **MS-WITS TRAINING**  
Web Infrastructure for Treatment Services

**Log In**

User ID  
Username

Password  
Password

PIN  
PIN

[Forgot Password or Pin?](#)

**Training** **Login**

Figure 1-6: Training login screen

## Help Logging In

### Forgot Password Link

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

DMH MS-WITS TRAINING  
Web Infrastructure for Treatment Services

Log In

User ID  
Username

Password  
Password

PIN  
PIN

[Forgot Password or Pin?](#)

Training  
Version: 20.1.0.0 | Powered by WITS

Login

Figure 1-7: Login screen, Forgot Password or Pin link

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

DMH MS-WITS TRAINING  
Web Infrastructure for Treatment Services

Reset your password by email

Username  
ciji.test

Submit

Figure 1-8: Forgot Password screen

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

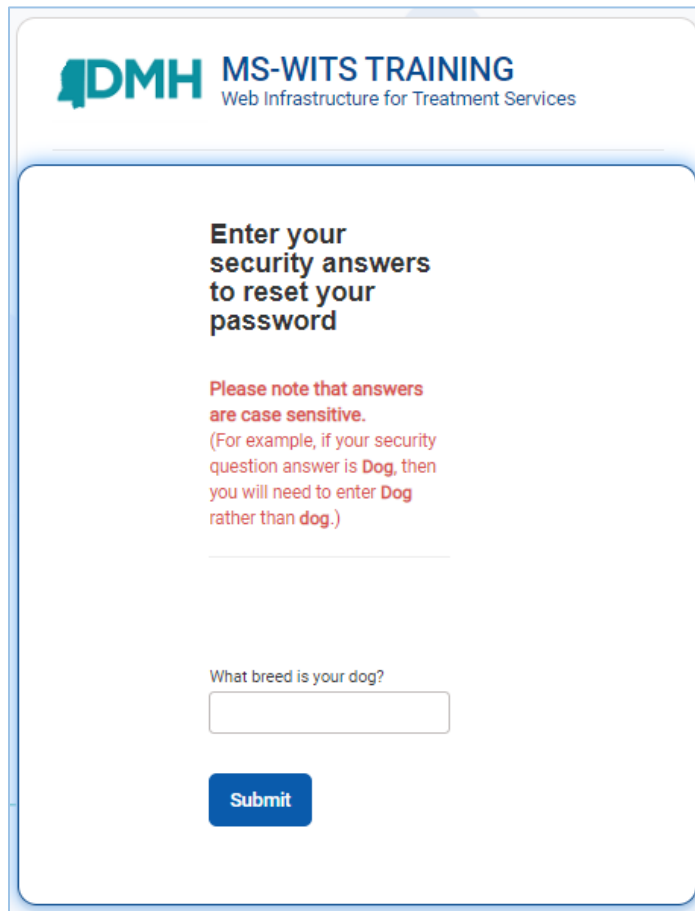


Figure 1-9: Forgot Password screen, Answer field

4. An email will be sent from [noreply@witsweb.org](mailto: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.

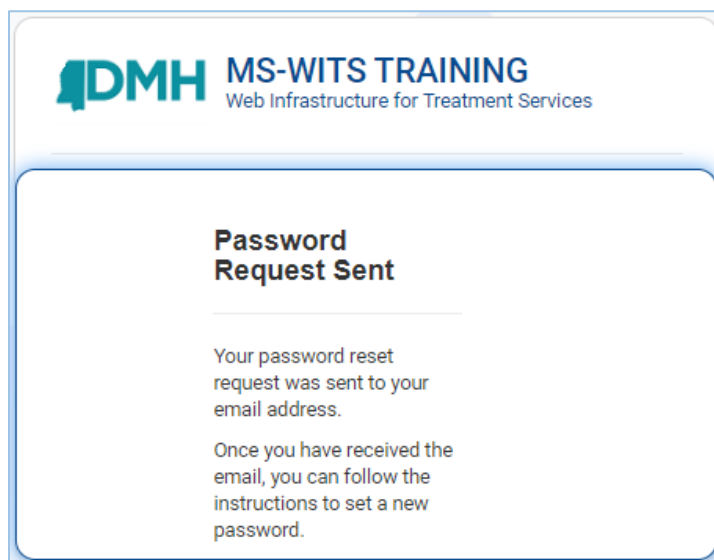


Figure 1-10: Forgot Password, Confirmation screen

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.

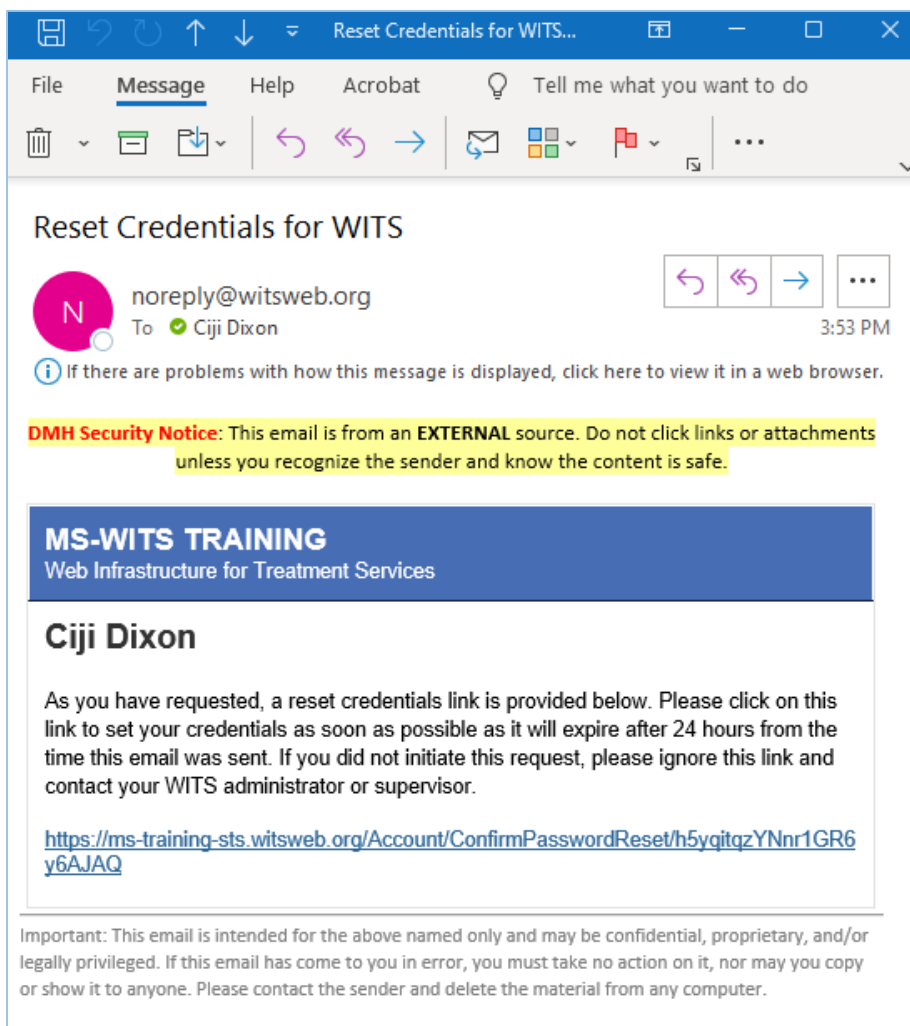


Figure 1-11: Reset Credentials Email

- 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.

**DMH MS-WITS TRAINING**  
Web Infrastructure for Treatment Services

### Reset Credentials

Display Name  
Dixon, Ciji

Email  
ciji.dixon@dmh.ms.gov

Security Question  
What breed is your dog? ▼

Answer  
\*\*\*\*\*

Password  
\*\*\*\*\*

Confirm Password  
\*\*\*\*\*

PIN  
\*\*\*\*\*

Confirm PIN  
\*\*\*\*\*

**Save** Cancel

☐ Show Password/Pin

Figure 1-12: Reset Credentials screen

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

**DMH MS-WITS TRAINING**  
Web Infrastructure for Treatment Services

## Success

You can now log in to WITS.

Figure 1-13: 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 on the arrow and select **Logout**. This will open the Logout window.

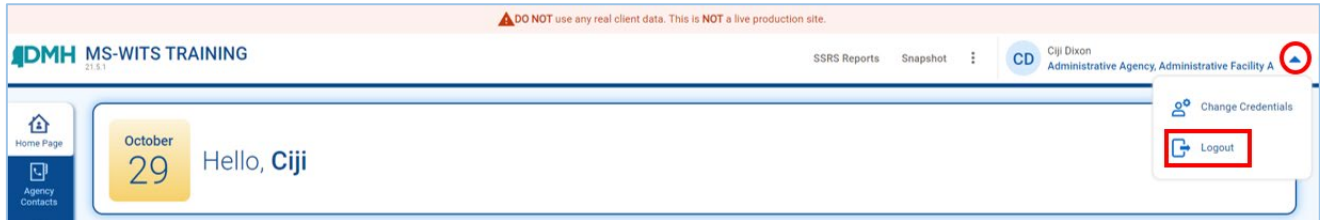


Figure 1-14: Logout button

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

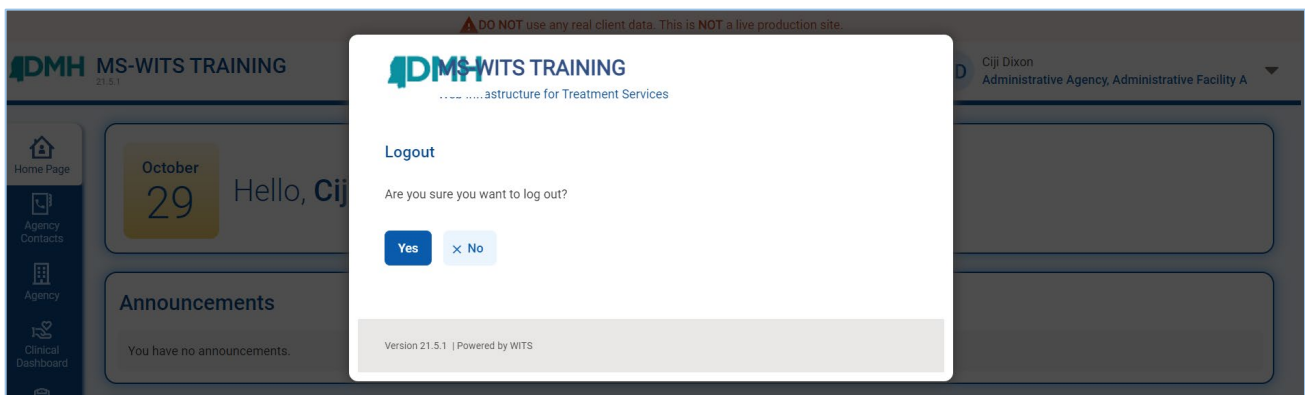


Figure 1-15: Logout confirmation window

**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 on the arrow to display the drop-down menu.

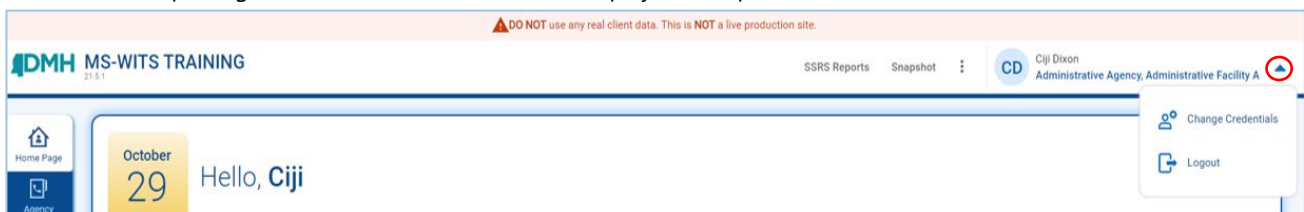


Figure 1-16: Top Navigation Bar, drop-down menu



- Click **Change Credentials**.

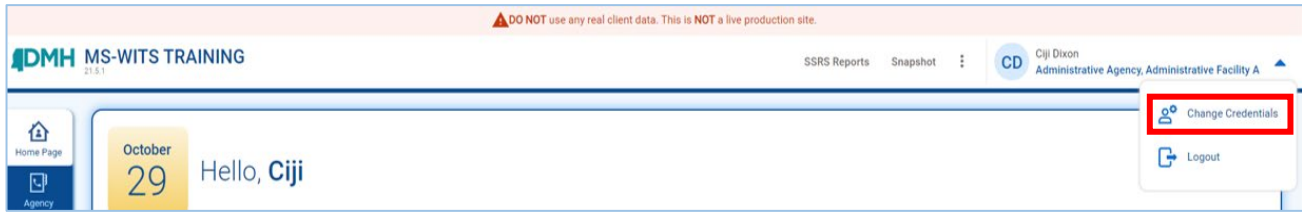


Figure 1-17: Change Credentials link

- This will open the Change Password screen.

 A screenshot of the "Change Credentials" screen. The header shows the DMH logo and "MS-WITS TRAINING Web Infrastructure for Treatment Services". The title "Change Credentials" is prominently displayed. Below the title, the "User ID" is shown as "Ciji.Test". The form includes a "Security Question" dropdown menu with the option "What breed is your dog?". Below this is an "Answer" field with masked characters. There is a checkbox labeled "Show Password/PIN". The form has sections for "Old Password", "New Password", and "Confirm Password", each with a text input field. Similarly, there are sections for "Old PIN", "New PIN", and "Confirm PIN", each with a text input field. At the bottom, there are two buttons: "Change" and "Cancel".

Figure 1-18: Change Password screen

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

Table 1-2: Update Password fields

Field	Description
<b>User Name</b>	Read-only field displaying your User ID.
<b>Security Question</b>	Current Security Question is displayed. To update this question, select another option from the drop-down list.  <b>Note:</b> 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 <b>Error! Bookmark not defined.</b> for more information.

<b>Answer</b>	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. <b>Note:</b> Your answer is case sensitive.
<b>Old Password</b>	Type your current password.
<b>New Password</b>	Your Password must have at least six (6) characters and contain at least three (3) of the following: <ul style="list-style-type: none"> <li>• Uppercase letters</li> <li>• Lowercase letters</li> <li>• Numbers</li> <li>• Punctuation</li> </ul> <b>Note:</b> Your Password and Pin must be different. <b>Note:</b> These Password and Pin requirements may differ based on the settings established for your Training and/or Production site(s).
<b>Confirm Password</b>	Retype your new password.
<b>Old PIN</b>	Type your current pin.
<b>New PIN</b>	Your Password must have at least six (6) characters and contain at least three (3) of the following: <ul style="list-style-type: none"> <li>• Uppercase letters</li> <li>• Lowercase letters</li> <li>• Numbers</li> <li>• Punctuation</li> </ul> <b>Note:</b> Your Password and Pin must be different. <b>Note:</b> These Password and Pin requirements may differ based on the settings established for your Training and/or Production site(s).
<b>Confirm PIN</b>	Retype your new pin.

5. Click **Change**.

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



Old Password

\*\*\*\*\*

New Password

Confirm Password



Old Password

OldP@SsWOrd

New Password

Confirm Password

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

☐ Show Password/PIN

Old Password

.....

New Password

.....

Confirm Password

.....

Old PIN

.....

New PIN

.....

Confirm PIN

.....

Change

× Cancel

☒ Show Password/PIN

Old Password

.....

New Password

NeWp@SsWOrd

Confirm Password

NeWp@SsWOrd

Old PIN

.....

New PIN

mJoph\$\$@gvh2@

Confirm PIN

mJoph\$\$@gvh2@

Change

× Cancel

## Security Features

- WITS will automatically lock an account if you are signed into 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.
- In the new WITS user interface, a new security feature was introduced in which the system will mimic a sign-in attempt with an invalid ID as if it were a real ID. If a user enters User ID that does not exist, the system no longer displays a message indicating that it's an invalid ID and/or that the ID doesn't exist as it did in previous versions. Instead, the user will receive the **"your account has been disabled"** message after 3 failed attempts with the invalid ID. **The user will then receive this error message every time there is an attempt to login using that invalid User ID.**
  - For example, If the users ID is **FirstInitialLastName** and they are trying to login with an incorrect User ID, such as the email address **Firstnamelastname@fakeemail.com**,
    - on the first failed login attempt, they will be told "Invalid user or credentials."
    - on the second failed login attempt they will be told "Invalid user or credentials."
    - the next failed login attempt will disable the account.
    - on the third failed login attempt they will be told "You have exceeded the maximum number of log-in attempts."
    - on the fourth failed login attempt, **and every failed login attempt there after** they will be told, "You have exceeded the maximum number of log-in attempts." This also means that with future attempts at logging into WITS with the incorrect User ID, users will immediately receive a message that the account has been disabled.

# Part 2: 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.

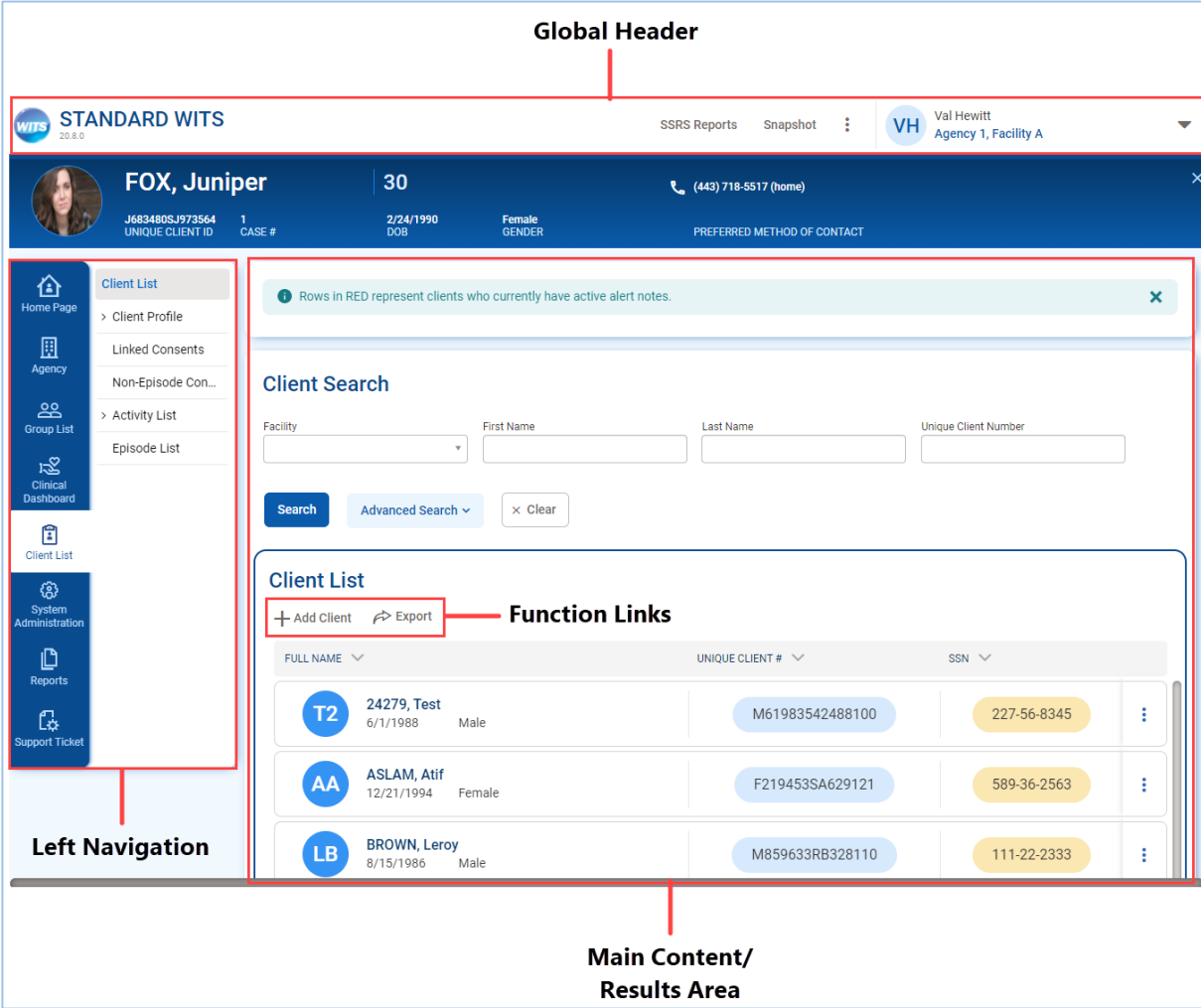


Figure 2-1: WITS User Interface Diagram

## Home Page

The Home Page is the landing screen when first logging into WITS. Users will first see a default agency and facility listed on the Change Facility screen of the Home Page. You may select **Go** to proceed to additional sections of the Home Page.

The screenshot shows the MS-WITS TRAINING interface. The top header includes the logo, version 21.5.2, and navigation links for SSRS Reports and Snapshot. The user profile shows 'CD Ciji Dixon, Department of Mental Health, Main Office'. A left sidebar contains icons for Home Page, Agency Contacts, Agency, Group List, Clinical Dashboard, Client List, and System Administration. The main content area is titled 'Change Facility' and contains four input fields: 'Current Agency' (Department of Mental Health), 'Current Facility' (Main Office), 'New Agency' (Department of Mental Health), and 'New Facility' (Main Office). At the bottom are 'Go' and 'Cancel' buttons.

Figure 2-2: Change Facility on Home Page

Announcements, Alerts and Schedule are displayed for users to quickly see important information.

The screenshot shows the STANDARD WITS interface. The top header includes the logo, version 20.8.0, and navigation links for SSRS Reports and Snapshot. The user profile shows 'VH Val Hewitt, Agency 1, Facility A'. A left sidebar contains icons for Home Page, Agency, Group List, Clinical Dashboard, Client List, System Administration, Reports, and Support Ticket. The main content area is divided into three sections: 'Announcements', 'Alert List', and 'Scheduler'. The 'Announcements' section shows two announcements with dates and times. The 'Alert List' section has search filters and a message 'You have no alerts.' The 'Scheduler' section has search filters, date pickers, and a table of scheduled events.

START	END	SUMMARY	STATUS
1/20/2021 3:00 pm	1/20/2021 3:30 pm	Client: FOX, Juniper Status: Scheduled Service: Alcohol And/Or Drug Assessment	Scheduled

Figure 2-3: Homepage Announcements, Alert List, and Scheduler

## 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.

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



Figure 2-4: Top Navigation bar, Agency/Facility Location

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

A screenshot of the 'Change Facility' screen. The title 'Change Facility' is at the top. Below it, there are four input fields. The first two are labeled 'Current Agency' and 'Current Facility', both containing 'Administrative Agency' and 'Administrative Facility A' respectively. The next two are labeled 'New Agency' and 'New Facility', both containing 'Test DMH Agency' and 'Test Facility' respectively. At the bottom, there are two buttons: a blue 'Go' button and a white 'Cancel' button with a red 'x' icon.

Figure 2-5: Change Facility screen

## Left Navigation Menu

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. The left navigation menu displays icons for each module.



Figure 2-6: Left side navigation icons

**Hover:** When a menu item is hovered over, the cursor will change to a hand, and the background color changes from dark blue, to a lighter blue.

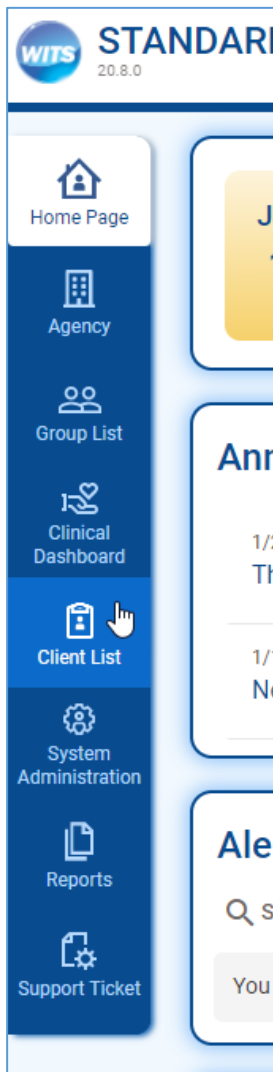


Figure 2-7: Left side navigation icons



**Select:** Clicking the desired menu item will change the background color to white, and in most cases, the left menu will expand to display additional menu options available for that module.

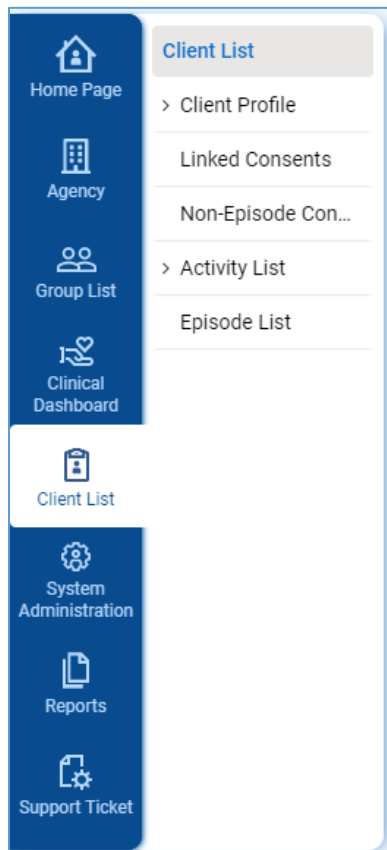


Figure 2-8: Left Navigation Bar with Expanded Menu

**Collapse Submenu:** To hide the submenu, click the icon on the left navigation menu for the current module. This will free up additional space on screen.

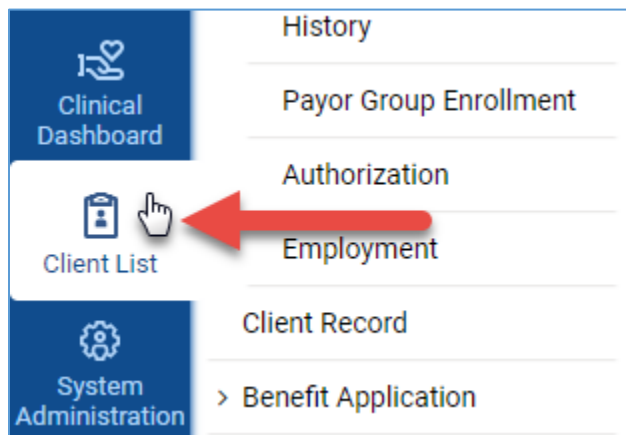


Figure 2-9: Click Left Menu Icon to Close Submenu

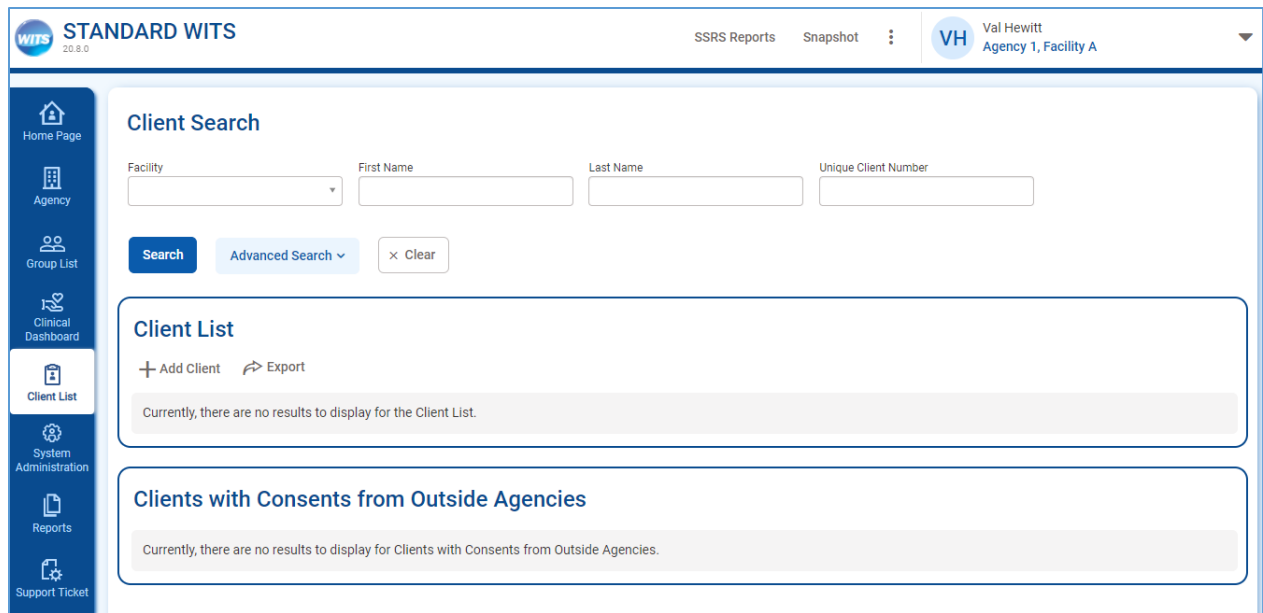


Figure 2-10: Screen with Left Menu Collapsed

**Submenu:** When the left navigation bar is expanded to show the submenu, the selected submenu location is shown with a gray background and blue text. If a submenu item includes (>) before the name, that section can be expanded to display additional menu items.

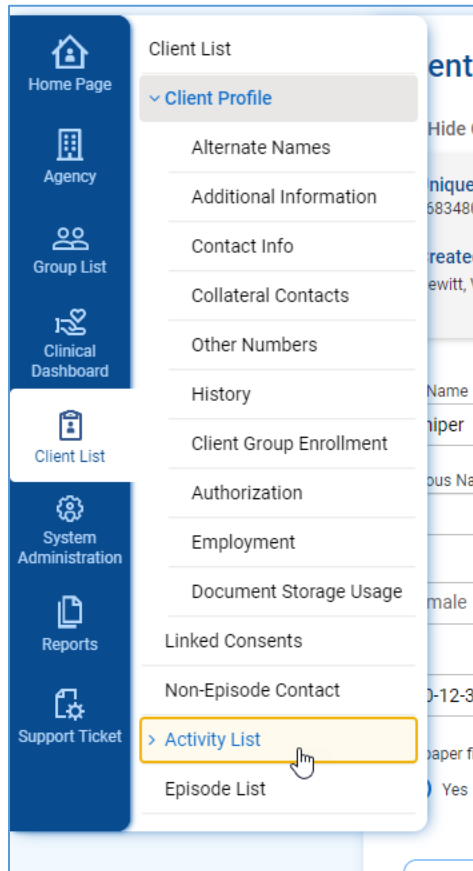


Figure 2-11: Submenu Sections

**Submenu Display:** When users are working elsewhere on screen, the submenu names may be cropped to save space on screen. When users mouse over the submenu, the submenu will expand to show the full names of submenu items.

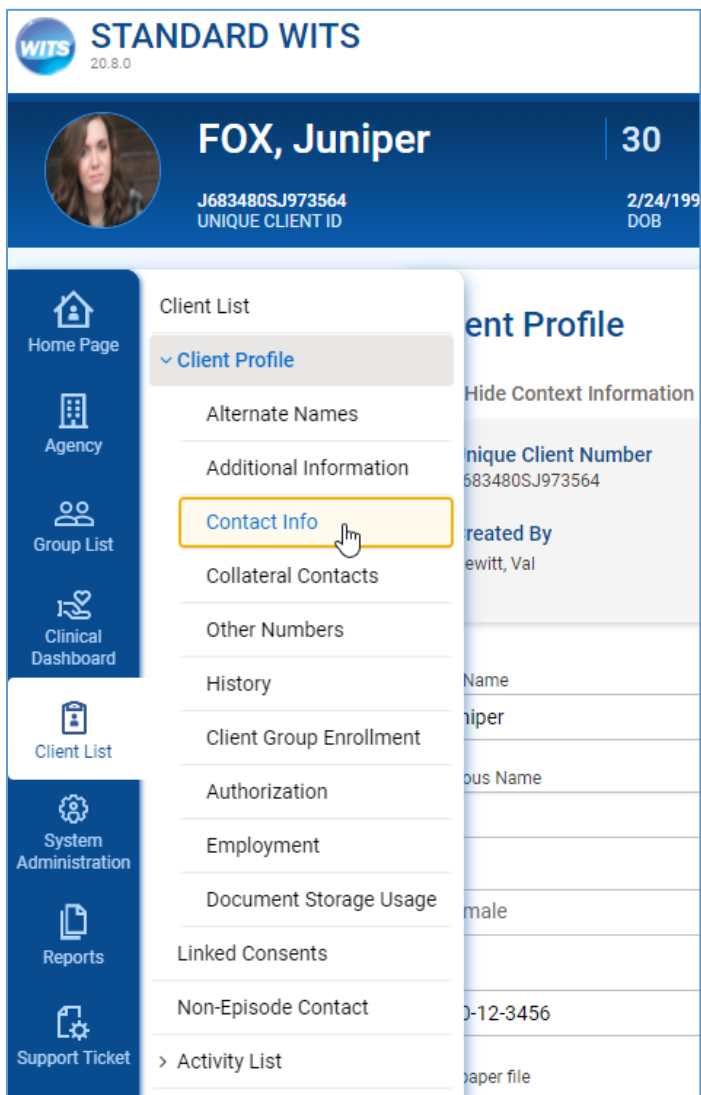


Figure 2-12: Hover over sub menu to expand

# Navigating Through Screens

## System Icons

Button	Selected Button	Functionality
<div>Save</div>	<div>Save</div>	Saves data entered and remains on the current screen.
<div>Save and Finish</div>	<div>Save and Finish</div>	Saves data entered and returns to the section start page.
<div>× Cancel</div>	<div>× Cancel</div>	Cancels the current action and returns to the previous screen.
<div> <div>◀ Back</div> <div>Next ▶</div> </div>	<div> <div>◀ Back</div> <div>Next ▶</div> </div>	Navigate through the screens in each section (left and right arrow buttons).
<div> <div>▶</div> <div>◀</div> </div>	<div> <div>▶</div> <div>◀</div> </div>	Moves data from one mover box to another (mover buttons).
<div>× Clear</div>	<div>× Clear</div>	Clears all criteria from search fields.
<div>Search</div>	<div>Search</div>	Run the search screen using the criteria entered in the search fields.
<div>Advanced Search ▾</div>	<div>Advanced Search ▾</div>	Expand search options

Figure 2-13: System Icons

Screens with multiple sections will include **Back** and **Next** buttons. At the beginning of each section, the Next button will be active, and the Back button will be inactive. Both Back and Next buttons will be active if there are screens before and after the current screen. At the end of section, the Back button will be active and the Next button will be inactive.



Figure 2-14: Back and Next buttons

Users can also navigate through screens with multiple sections by clicking on the sub menu of on the left side navigation.

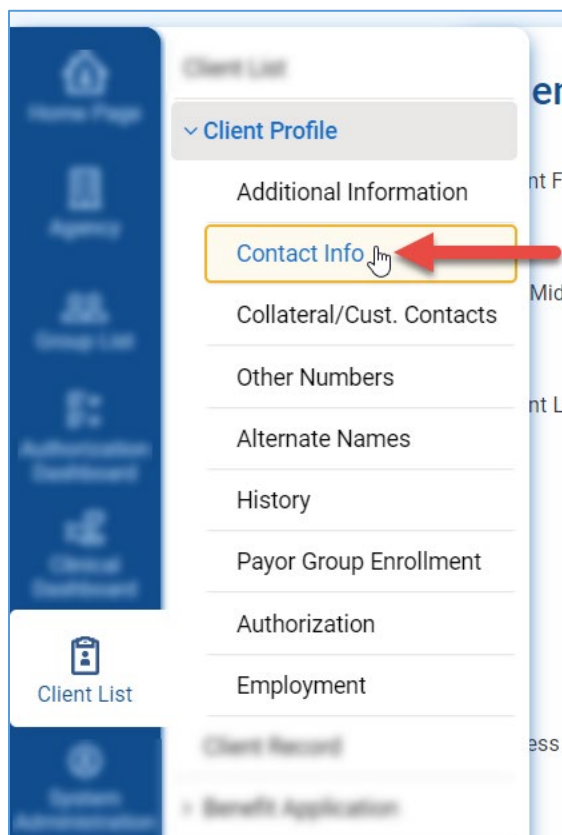


Figure 2-15: Left Side Navigation Sub Menu Navigation

# Global Header

This area contains information that helps the user know their current context in the system, which includes:

**Staff Member:** Displays the name of the staff member currently logged into the system.

**Agency/Facility Location:** Displays the Agency name and Facility name currently selected.

The Global Header also includes additional information and functionality, as shown in Figure 2: Global Header Features.

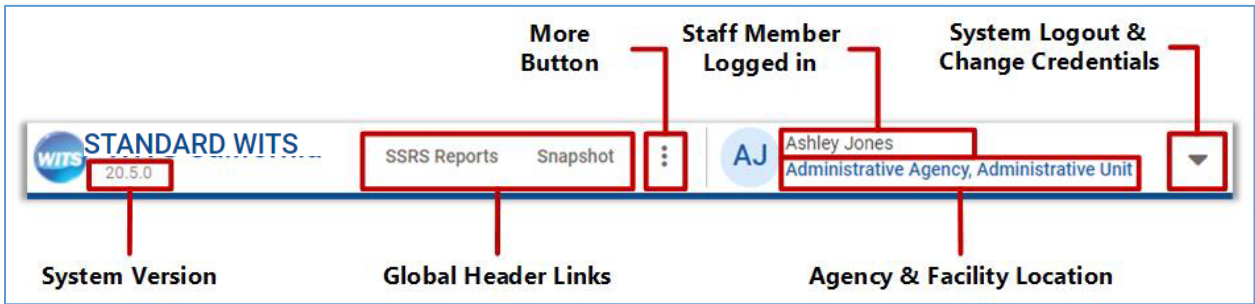


Figure 2-16: Global Header Features

When clicking the ellipsis (More Button), the list will expand with additional options.

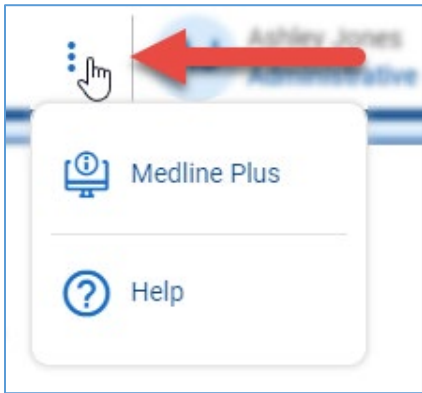


Figure 2-17: More Button in Header

When selecting the up arrow, the list will appear to let users change credentials or to log out of WITS.

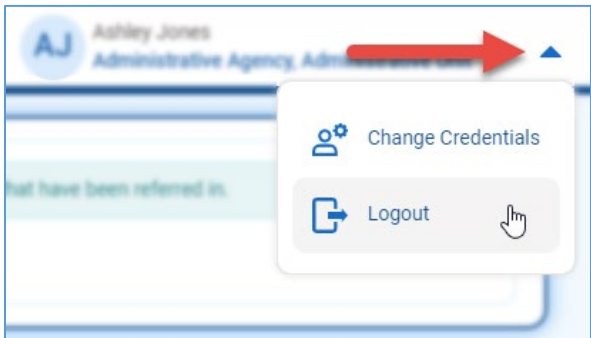


Figure 2-18: System Log out and change credentials

# Client Header

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, Client Photo, Unique Client Number (UCN), and Case Number if you are within the client’s activity list.

- Client Photo:** Photo from Client Profile, if one is uploaded. If not, will display the client’s initials.
- Client Name:** First and last name of client from the Client Profile.
- Unique Client Number:** WITS generated Unique Client Number and Case Number.
- Demographics:** Displays the client’s date of birth, age, and gender.
- Preferred Method of Contact:** The listed preferred method of contact on the Client Profile page.
- Close Button:** When this button is clicked, the system returns to the Client Search screen, just like the current functionality.

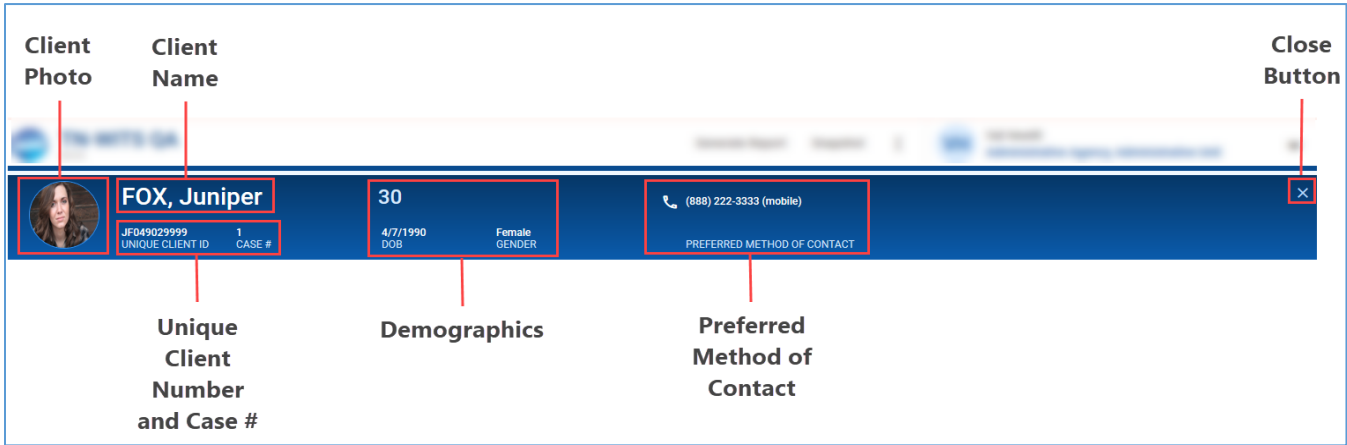


Figure 2-19: Client Context Diagram

On page scroll, the larger ribbon collapses to this smaller ribbon. Scroll back to the top of the screen to see the full header.

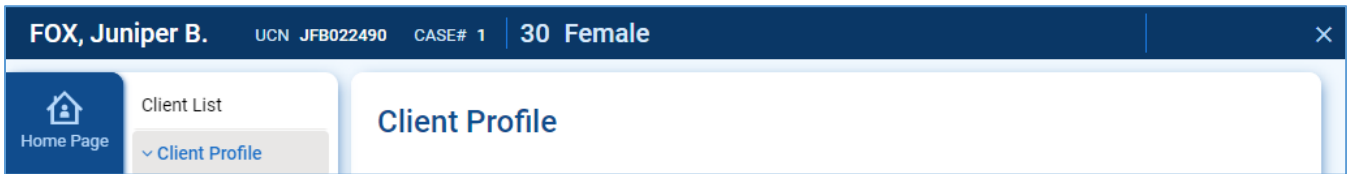


Figure 2-20: Ribbon Collapse on Page Scroll

# WITS Screens

The main area of the screen will constantly change as you progress through your workflow. Typically, you will first see one of these screens after logging into WITS:

- 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.
- Grants Management Dashboard:** Shows a snapshot of GPRA Data (for SOR customers).





## Search Screen

Default search fields are visible when the user accesses the screen. An **Advanced Search** button is also available to display additional search fields. The user may search for a client by inputting available information into the search fields and then selecting the **Search** button to view the list of clients in which the filters apply.

The 'Client Search' form includes four input fields: Facility (a dropdown menu), First Name, Last Name, and Unique Client Number. Below these fields are three buttons: a blue 'Search' button, a light blue 'Advanced Search' button with a downward arrow, and a grey 'Clear' button with an 'x' icon. A red arrow points to the 'Advanced Search' button.

Figure 2-21: Client Advanced Search Button

This screenshot shows the 'Client Search' form with the advanced search section expanded. A red rectangle highlights the following fields: SSN, DOB, Client Id, Provider Client ID, Agency (with 'Agency 1' selected), Primary Care Staff (radio buttons for Yes/No), Treatment Staff (dropdown), Intake Staff (dropdown), Case Status (dropdown with 'All Clients' selected), Number Type (dropdown), Other Number, and 'Include Only Active Consents' (radio buttons with 'Yes' selected).

Figure 2-22: Advanced Search Filters

The 'Client List' table displays search results with columns for Full Name, Unique Client #, and SSN. It includes a pagination bar at the top showing 'Showing 1 - 50 of 335' and a table of 8 client records. A red box highlights the pagination controls at the bottom of the table.

Full Name	Unique Client #	SSN
CA AHAB, Captain 1/1/1965 Male	M119523HA096100	392-03-9203
RA AKA, Rahul 8/3/1951 Unknown	U839968KA537100	895-26-3658
AA ALERT, Alert 9/1/1977 Male	M919744LA117100	652-32-1414
LA AMBU, Lance 1/1/1986 Male	Q553030QE252544	010-01-1986
AA ASAM, Admission 8/1/1992 Male	M819246SA549100	658-21-4456
LA ASAM, LA 3/1/1988 Female	M319263SA759100	888-72-5673
LA ASAM1, LA1 3/1/1970 Female	F319062SA757100	888-72-5672
AA ASD, Asd 4/14/1984 Male	M129745SA457121	121-25-5445

Figure 2-23: Advanced Search Result

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

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

# List Screen

List screens are located below Search screens, and can also be in other areas, such as the Activity List. On List screens, the Actions column is located on the right side of the screen. The Actions icon is a vertical ellipsis.

For the client list, the first column is combining DOB and Gender in the same cell with the client’s name. ID fields have an accent-colored background. If a client’s picture is uploaded, then it would display. Otherwise, the ID displays the initials of the client.

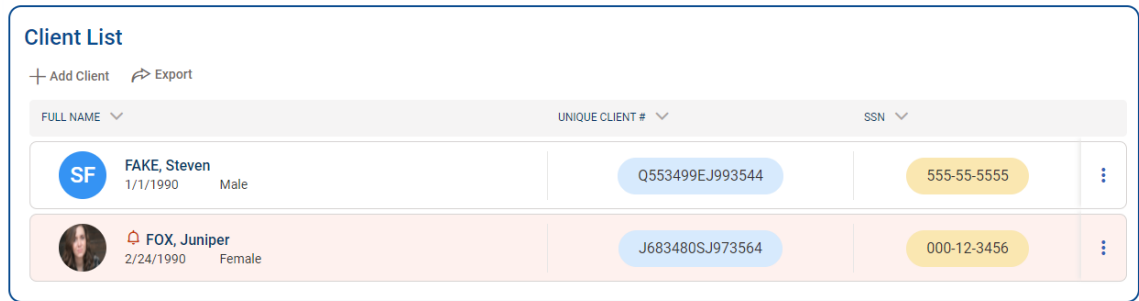


Figure 2-24 Client List New UI

## Navigating with List Results

On action rollover, action links are vertically stacked. To Navigate within the Client List screen, rows are highlighted when the cursor moves over the row. If a client’s row is pink, that means that the client has an alert on their record.

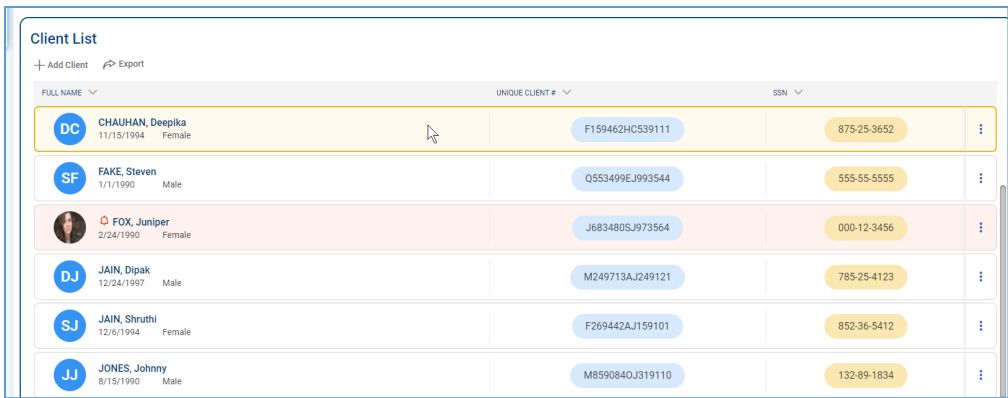


Figure 2-25: Highlighted Row when hovering on client row

To interact with an item displayed in a list, point to the actions icon to view a menu with available links. When pointing to an action, the cursor becomes a hand when you hover over the action text. To select an action, click the name be taken to that screen.

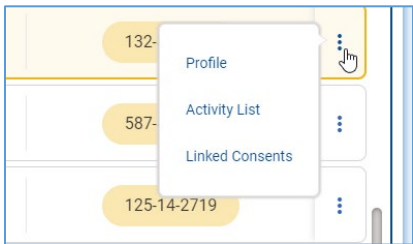
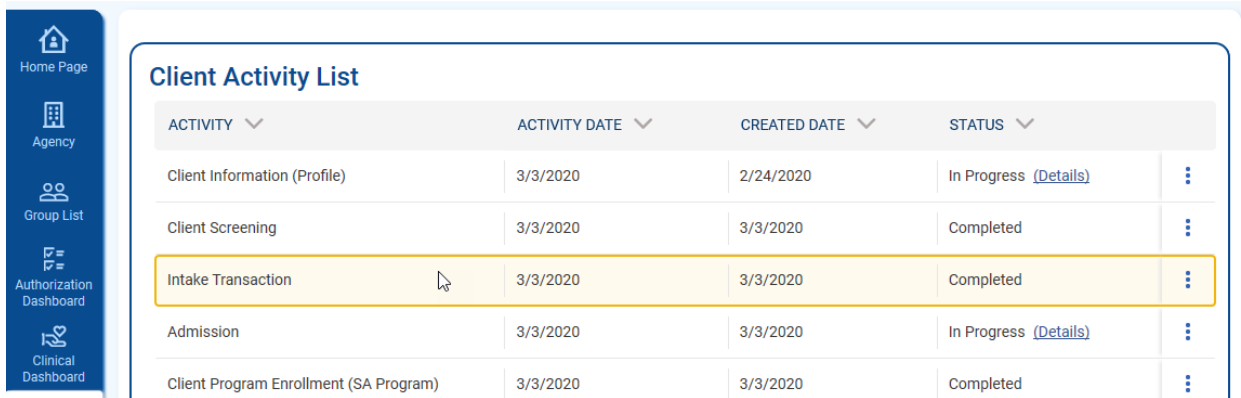


Figure 2-26: Hover Over Menu Icons in Client List

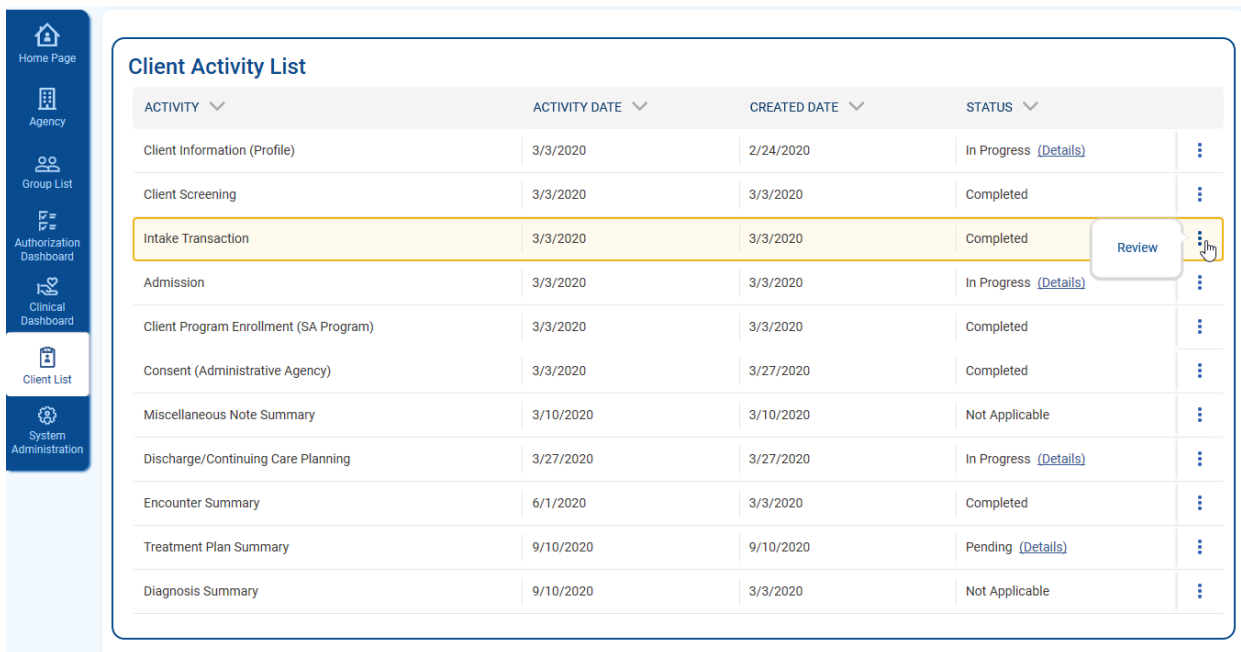
All expanded list icons have the menu icons on the right side of the screen.



ACTIVITY ▾	ACTIVITY DATE ▾	CREATED DATE ▾	STATUS ▾	
Client Information (Profile)	3/3/2020	2/24/2020	In Progress <a href="#">(Details)</a>	⋮
Client Screening	3/3/2020	3/3/2020	Completed	⋮
Intake Transaction	3/3/2020	3/3/2020	Completed	⋮
Admission	3/3/2020	3/3/2020	In Progress <a href="#">(Details)</a>	⋮
Client Program Enrollment (SA Program)	3/3/2020	3/3/2020	Completed	⋮

Figure 2-27: Client Activity List New

To access the Client Activity Menu hover over the ellipsis icon.



ACTIVITY ▾	ACTIVITY DATE ▾	CREATED DATE ▾	STATUS ▾	
Client Information (Profile)	3/3/2020	2/24/2020	In Progress <a href="#">(Details)</a>	⋮
Client Screening	3/3/2020	3/3/2020	Completed	⋮
Intake Transaction	3/3/2020	3/3/2020	Completed	⋮ Review
Admission	3/3/2020	3/3/2020	In Progress <a href="#">(Details)</a>	⋮
Client Program Enrollment (SA Program)	3/3/2020	3/3/2020	Completed	⋮
Consent (Administrative Agency)	3/3/2020	3/27/2020	Completed	⋮
Miscellaneous Note Summary	3/10/2020	3/10/2020	Not Applicable	⋮
Discharge/Continuing Care Planning	3/27/2020	3/27/2020	In Progress <a href="#">(Details)</a>	⋮
Encounter Summary	6/1/2020	3/3/2020	Completed	⋮
Treatment Plan Summary	9/10/2020	9/10/2020	Pending <a href="#">(Details)</a>	⋮
Diagnosis Summary	9/10/2020	3/3/2020	Not Applicable	⋮

Figure 2-28: hover Over Menu Icon Client Activity List

# Profile Screen

The profile screens show basic information about the client, and information about encounters recorded. All required fields have an orange bar on the left.

STANDARD WITS

Generate ReportSSRS ReportsDocuments (0)Snapshot

VHVal Hewitt  
Agency 1, Facility A

FOX, Juniper

J683480S.J973564  
UNIQUE CLIENT ID

2/24/1990  
DOB

Female  
GENDER

(443) 718-5517 (home)

PREFERRED METHOD OF CONTACT

Client List

Client Profile

Alternate Nam...

Additional Inf...

Contact Info

Collateral Con...

Other Numbers

History

Client Group E...

Authorization

Employment

Document Sto...

Linked Consents

Non-Episode Con...

Activity List

Episode List

Client Profile

Hide Context Information

Unique Client Number  
J683480S.J973564

State Client ID

Created By  
Hewitt, Val

Created Date  
1/19/2021 9:34 AM

Updated By  
Hewitt, Val

Updated Date  
1/19/2021 9:42 AM

First Name  
Juniper

Middle Name

Last Name  
FOX

Previous Name

Mother's Maiden Name

Suffix

Sex  
Female

Gender Identity  
Identifies as Female

DOB  
2/24/1990

SSN  
000-12-3456

Provider Client ID

Driver's License

Has paper file  
☒ Yes ☐ No

Upload Profile Image

No File Selected... Browse Upload

Remove Image

BackNextSaveSave and FinishCancel

Alternate Names

+ Add

Currently, there are no results to display for Alternate Names.

Addresses

+ Add

ADDRESS TYPE	ADDRESS	CONFIDENTIAL	CREATED	UPDATED
Client Home	145 River View Drive, Petal, MS 39465	No	1/19/2021	1/19/2021

Figure 2-29: WITS Client Profile Screen

# Client Profile Photo

WITS has the ability to store and show client profile photos. To add a client profile photo, on the Client Profile screen, In the Upload Profile Image section, click the Choose File button to open the file picker, and once the file is selected, click upload.

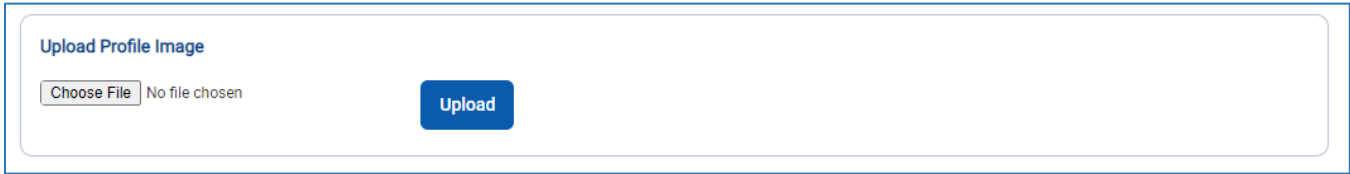


Figure 2-30: Upload Client Profile Photo

Once uploaded, the client profile will appear on the client profile page, in the client header, and the Client Search results list.

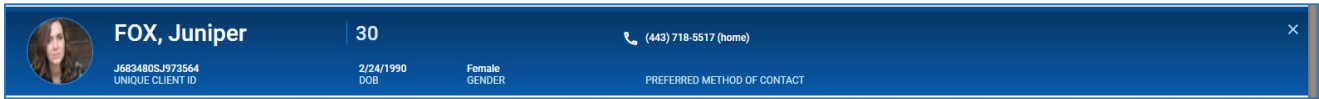


Figure 2-31 Client Photo in Header

The picture can be changed or deleted on the client profile. To delete the picture, click the Remove Image button. To upload a new picture, click the Browse button, select the picture from your desktop, and click the upload button.

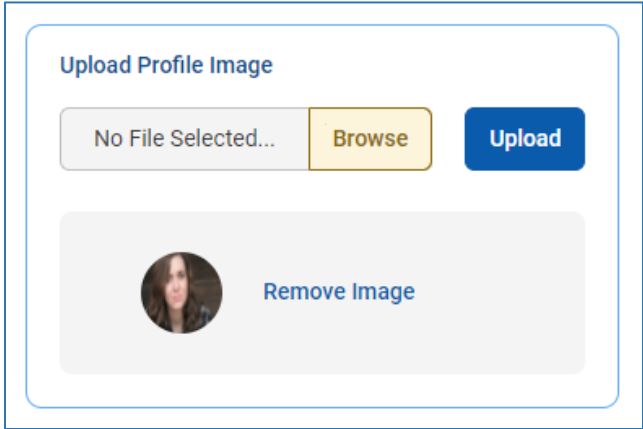


Figure 2-32 Change/Delete Client Profile Photo

# Function Links

If the screen allows you to perform certain actions, such as **Add** or **Export**, the functions appear below the Section Header. A hand icon will also appear when your cursor floats over the action item, reminding you that you can click. Hovering over the link will turn the link blue.

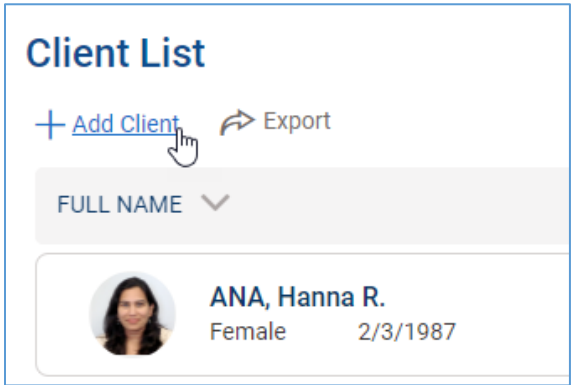


Figure 2-33: Function link for Add Client

# Grant Management Dashboard

The grant dashboard is a new screen for SOR customers. The dashboard shows a snapshot of GPRA Data, including GPRA's by Gender, by races, and GPRA follow up compliance. Each of the pie charts on the screen can be filtered by Grant, Agency, and date range.

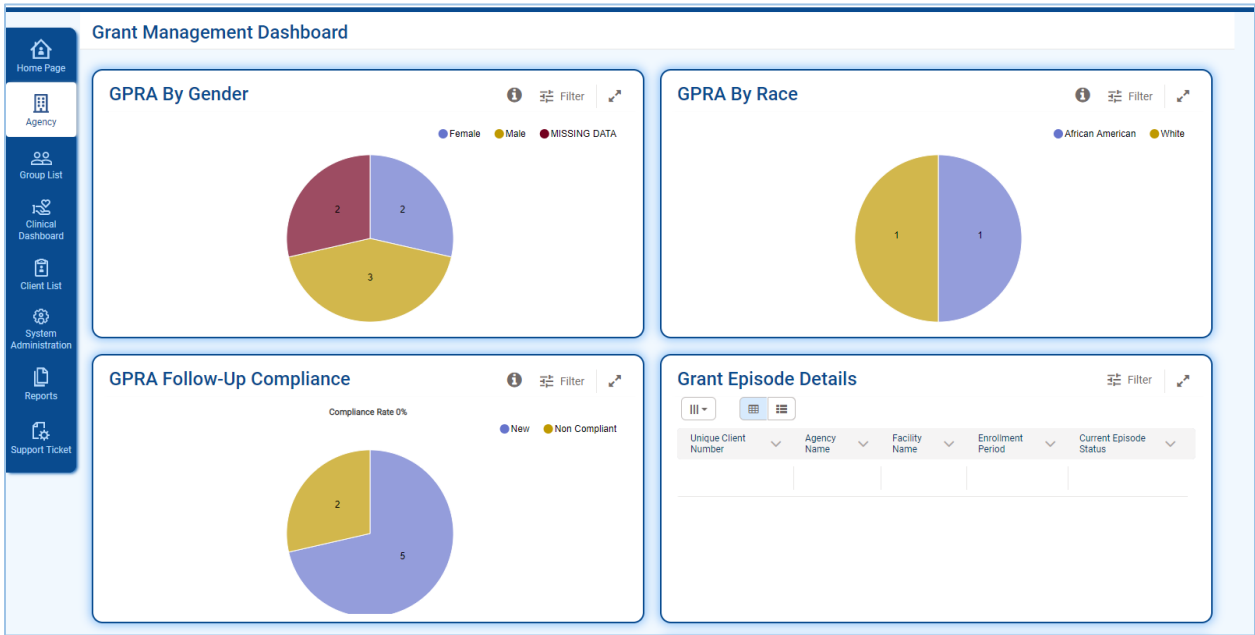



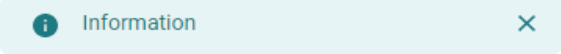
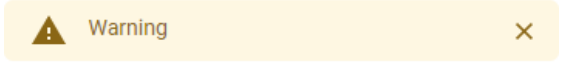
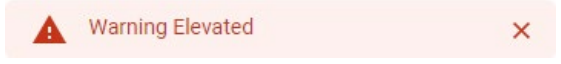
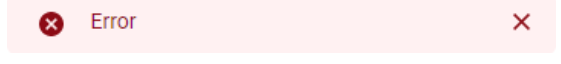
Figure 2-34: Grant Management Dashboard



## Alerts/Notifications

Alerts and Notifications will appear at the top of the WITS Screen, below the header.

Table 3: New UI System Alerts Styling

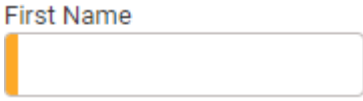


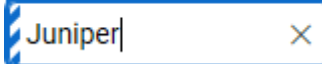



System Alert/Notification	Description
	<b>Success:</b> This notification informs the user that their action was completed.
	<b>Informational:</b> This notification message informs users that something has occurred.
	<b>Warning:</b> This notification message warns the user that entered data falls outside of a certain parameter. The record can still be updated.
	<b>Warning Elevated:</b> This type of notification is a higher warning message that needs to stand out more.
	<b>Error:</b> This 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.

## Part 3: Field Types

### Textbox

**Functionality:** Enter text into the field. Requirements are in a bar on the left side of the field.

The table below outlines the changes to text box fields; however, this pattern is the same for all field types.

Description	Required to Save	Required for Completion
Base		
Focus (when the field is clicked)		
Filled In		
Validation Error (empty)		

### Select Option (drop-down)

**Functionality:** Select one option from drop down box.





**Key Changes(s):**

Requirements are in a bar on the left side of the field

Description	Required to Save	Required for Completion
Drop down		

## Radio Buttons

**Function:** Select one option. Yes/No fields are now represented by radio buttons. Requirements are in a bar on the left side of the field. To clear the field, select the option again.

Description	Required to Save	Required for Completion
Base Radio Buttons	<b>Billable</b>  <input type="radio"/> Yes <input type="radio"/> No	<b>Consent on File for Future Contact</b>  <input type="radio"/> Yes <input type="radio"/> No
Radio Buttons Selected	<b>Billable</b>  <input checked="" type="radio"/> Yes <input type="radio"/> No	<b>Consent on File for Future Contact</b>  <input type="radio"/> Yes <input checked="" type="radio"/> No

## Multi-Select List Box/Transfer Box

**Functionality:** Select multiple options from one mover box to another. Requirements are in a bar on the left side of the field

Depending on what browser you are using, the scroll bar appearance differs.

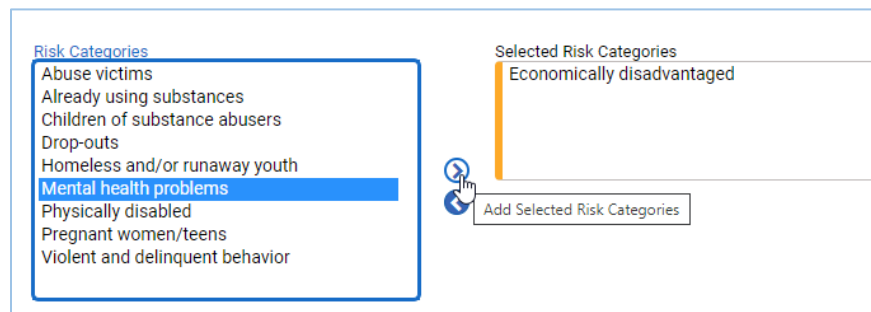


Figure 3-1: Multi Select Box Required to Save Question

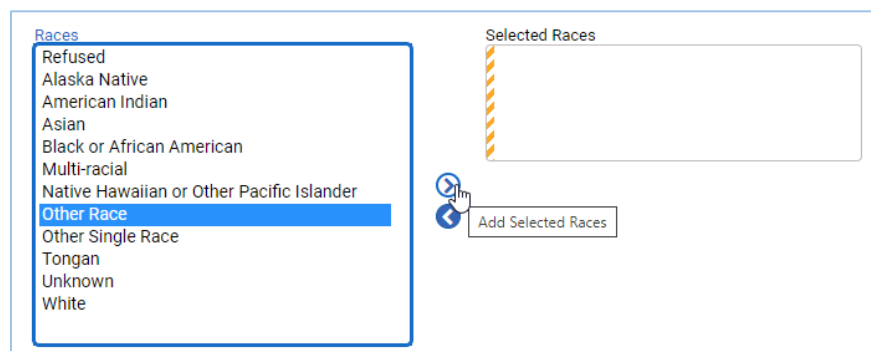


Figure 3-2: Multi Select Box Required for Completion

## Time Input

**Functionality:** Enter the time. Requirements are on the left side of the field

Start Time	End Time
11:30 AM	12:30 PM

Session Duration	Documentation Duration
60 Min	15 Min
Travel Duration	Total Duration
30 Min	105 Min
# of Service Units / Sessions	
1	

Figure 3-3: Time Input Fields

# Part 4: Hints and Tips

## 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 4-1: Snapshot button

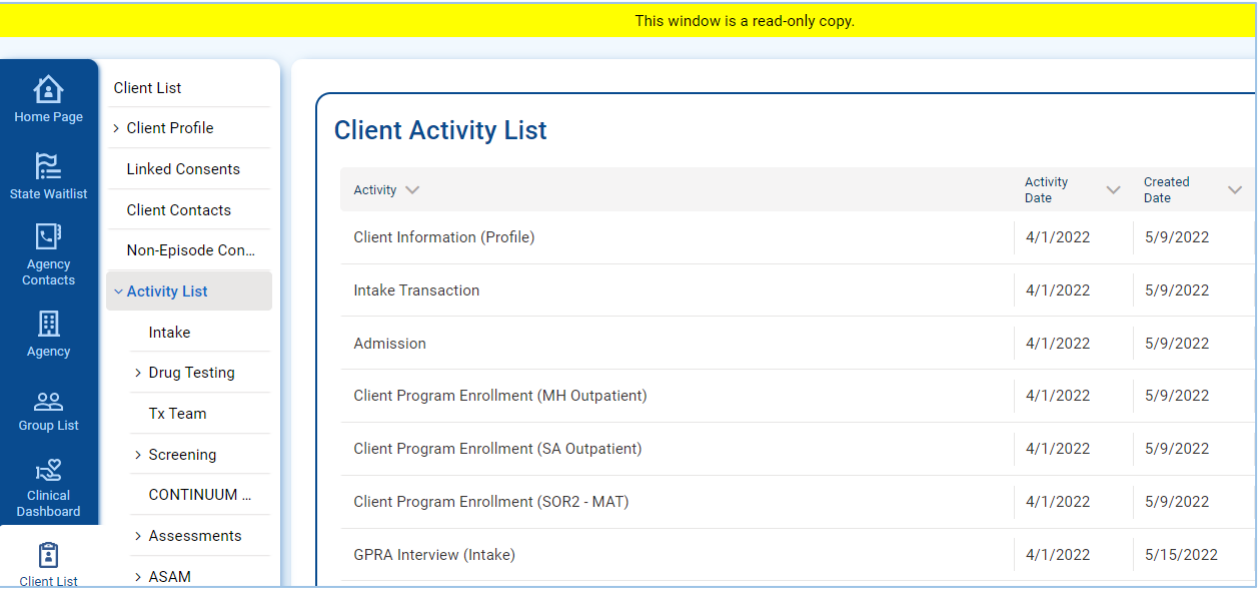


Figure 4-2: Snapshot, read-only window

## 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**.

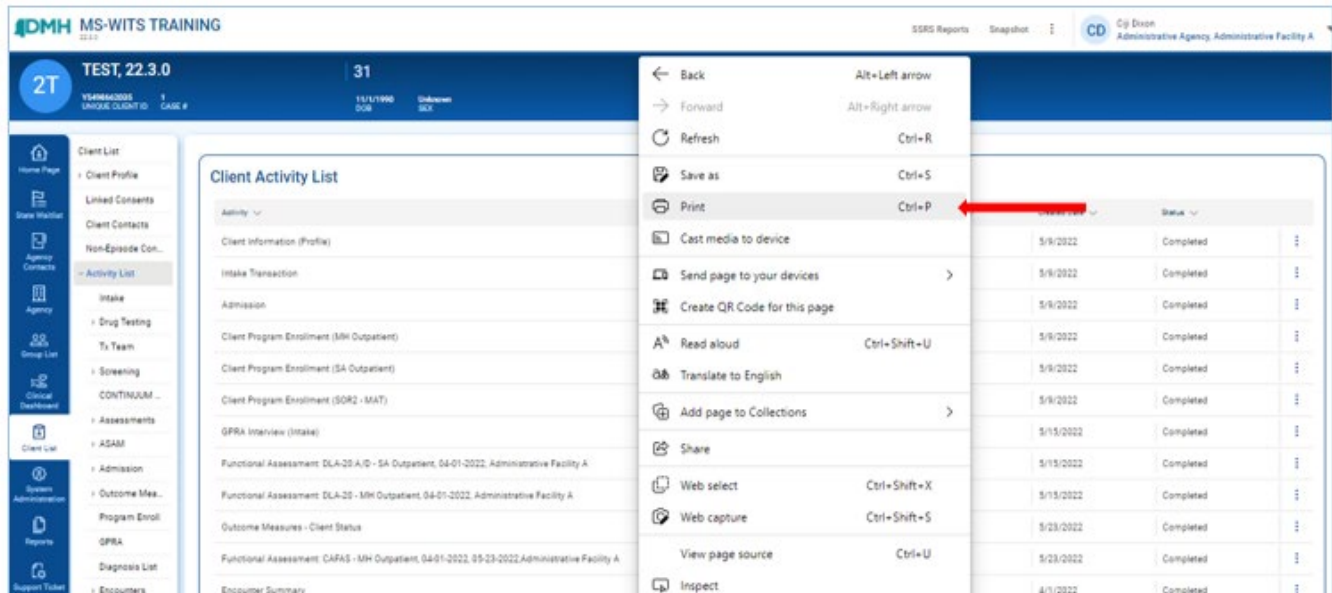


Figure 4-3: Right-click to open Internet browsers Print function

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

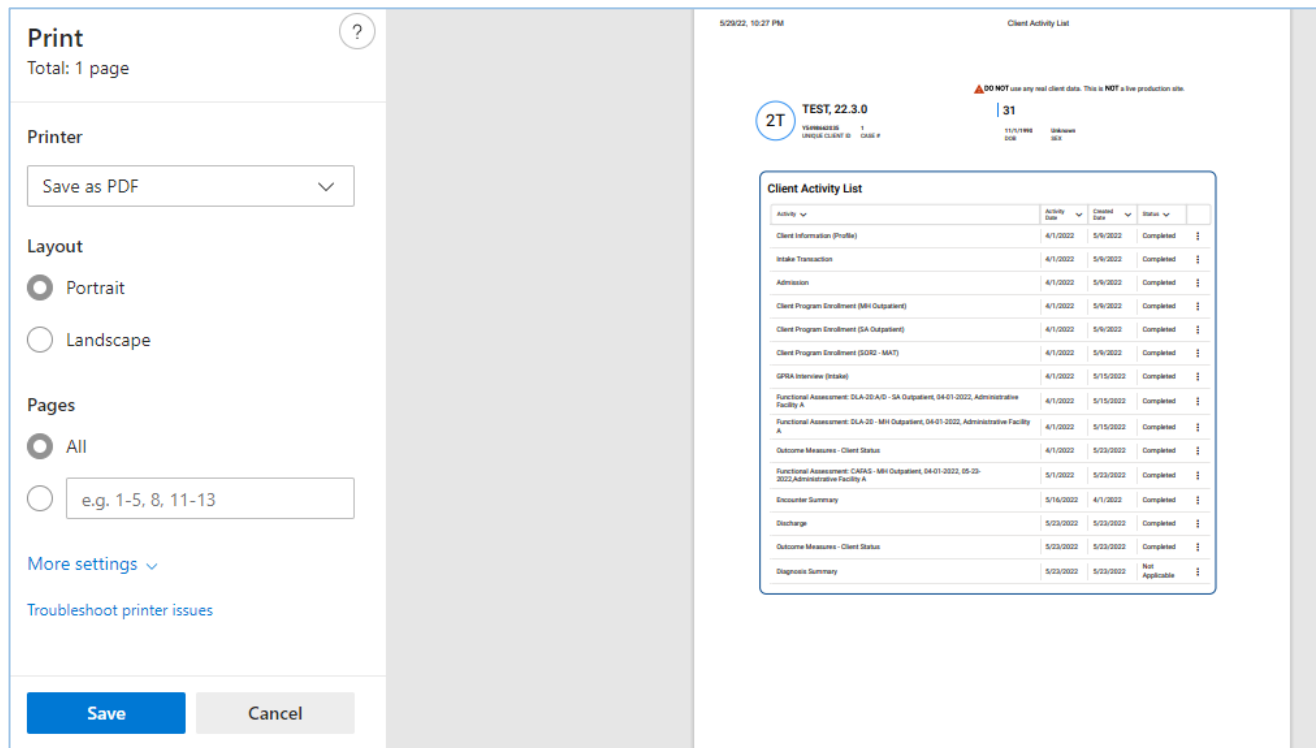


Figure 4-4: Print Preview

## Part 5: Frequently Asked Questions

### Logging In

1. **Question:** How many log-in attempts do I have?
  - a. **Answer:** Each user has **three (3)** attempts to log in with their correct password and pin.
  - b. **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.
2. **Question:** Will the system automatically log me out?
  - a. **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

3. **Question:** Can I use my browser’s “back” button?
  - a. **Answer:** No. To return to the prior screen, use the left navigation menu and/or left arrow button on screen.
4. **Question:** I just typed in answers for the fields displayed on screen, but when I clicked “Search”, the information I just entered is not displayed in the list. What happened?
  - a. **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.

### MS-WITS Technical Assistance and Contacts

5. **Question:** Who do I contact if I have questions or need technical assistance regarding the WITS system?
  - a. **Answer:** You may contact a DMH-WITS Administrator by sending an email to [ehrhelppdesk@dmh.ms.gov](mailto:ehrhelppdesk@dmh.ms.gov). When sending an email to the ehrhelppdesk, be sure to include “WITS” in the subject line so the request is directed to the correct department.
  - b. **Tip:** When sending emails to [ehrhelppdesk@dmh.ms.gov](mailto:ehrhelppdesk@dmh.ms.gov), do not include any client’s Protected Health Information (PHI) to avoid HIPAA violations. You may include the client’s Unique Client ID, Provider Client ID (chart number), or the MS-WITS Client ID along with details of the request.