



FEI Systems



Connecting Every Dimension of
Health and Human Services

WITS User Interface Updates

Customer(s):

All WITS Customers

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1 Introduction

At the forefront of developing innovative health and human services technologies, FEI Systems continues to enhance our applications with modern technology and development standards. For our next phase of WITS development, we enlisted help from our User Experience (UX) team of experts to improve the WITS application. FEI is pleased to present our refreshed WITS user interface (UI), which represents our latest milestone in WITS development. The refreshed UI features a modern design with updated visuals, revised color palette, and modern icons that optimize screen real estate and improves accessibility throughout the application. This cleaner look gives WITS an updated look and feel, and more consistency throughout WITS. In addition, this UI update will give users an improved user experience for the WITS application.

1.1 Purpose

This document provides an overview of updates included in the refreshed user interface of WITS.

1.2 Timeline

The updated UI is being released in the 20.9.2 release and will be available **January 29th, 2021**.

Both Prime and Enhanced architecture (EA) WITS screens will be included in the release.

EA Treatment screens will be updated the 20.9.3 release.

1.3 Terminology

The table below includes terminology and acronyms used in this document.

Table 1-1: Terminology

Term	Description
User Interface (UI)	User Interface. Refers to what the user sees.
WITS Prime	These are WITS screens built on Legacy Enterprise Architecture Framework.
Legacy UI	WITS Prime screens are now referred to as the Legacy user interface.
EA (Enhanced Architecture)	WITS Screens built on new Enhanced Architecture

2 Summary of Key Changes

Navigation

- Left navigation menu uses icons to identify modules; the order that menu items are displayed remains the same
- Left menu is navigable using keyboard arrows

Home Page

- New Date and Hello section

Search Screen

- The “Go” button has been replaced with “Search”
- Search fields are no longer compacted on screen
- An “Advanced Search” button is available on the Client Search screen, which displays all available search fields

List Screen

- Table sorting represented by arrows
- “Add” (+) icon added to section header buttons
- On List screens, the Actions column is now located on the right side
- Actions icon is now a vertical ellipsis, not the pencil icon
- On action rollover, action links are vertically stacked

Profile Screen

- Placement of buttons is now located on the left side
- Updated fields and buttons (see sections 3.5 and 3.6 for more information)
- Ability to add client photo

Buttons

- Colors have been updated to blue theme
- Cancel button placement
- Finish is now “Save and Finish”
- Back and Next buttons updated with text.

Fields

- Label placement for each field is now located above the field
- Required for Completion and Required for Save indicators have changed to the left side
- Yes/No fields now represented as Radio Buttons

Select Option (drop-down)

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

Radio Buttons

- 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

Multi-Select List Box/Transfer Box

- Requirements are in a bar on the left side of the field
- Updated look of mover buttons

Time Input

- Requirements are on the left side of the field

2.1 Notes about the UI Change:

1. Most importantly, actions on the right improve accessibility. Like people, a screen reader will read from left to right. By announcing the actions first (on the left) the user won't know what the actions pertain to since it will read that data after. Therefore, it works best for the user to read the data in the row and then choose which action they wish to perform.
2. Actions on the right is the standard pattern found in systems throughout the web and within FEI's products. FEI is developing a design system that would be consistent amongst all FEI products. The goal is to design all FEI products with a similar user interface, so that when integration occurs between these products, the user has a consistent experience.
3. By moving the actions on the right and when hovered, the action links box no longer covers the most important data that is seen in the front of each row.
4. FEI changed the icon to an ellipsis versus a pencil because the pencil means edit, whereas an ellipsis is a more standard way to indicate that there is "more".
5. This UI will work in all modern browsers. FEI is primarily testing in edge and chrome, If users come across issues in other browsers (including Firefox and Safari) they can report it to support, and support will address issues based on severity. FEI is phasing out support of Internet Explorer by Jun 30th, 2021 because Microsoft is ending support for the browser.

2.2 Accessibility Updates

- Date pickers are focusable and keyboard accessible when using the keyboard to navigate through the calendar.
- Left menu is navigable with arrows on the keyboard (left-right, up-down).

3 User Interface

3.1 Navigation

Key Change(s):

- Left navigation menu uses icons to identify modules; the order that menu items are displayed remains the same
- Left menu is navigable using keyboard arrows

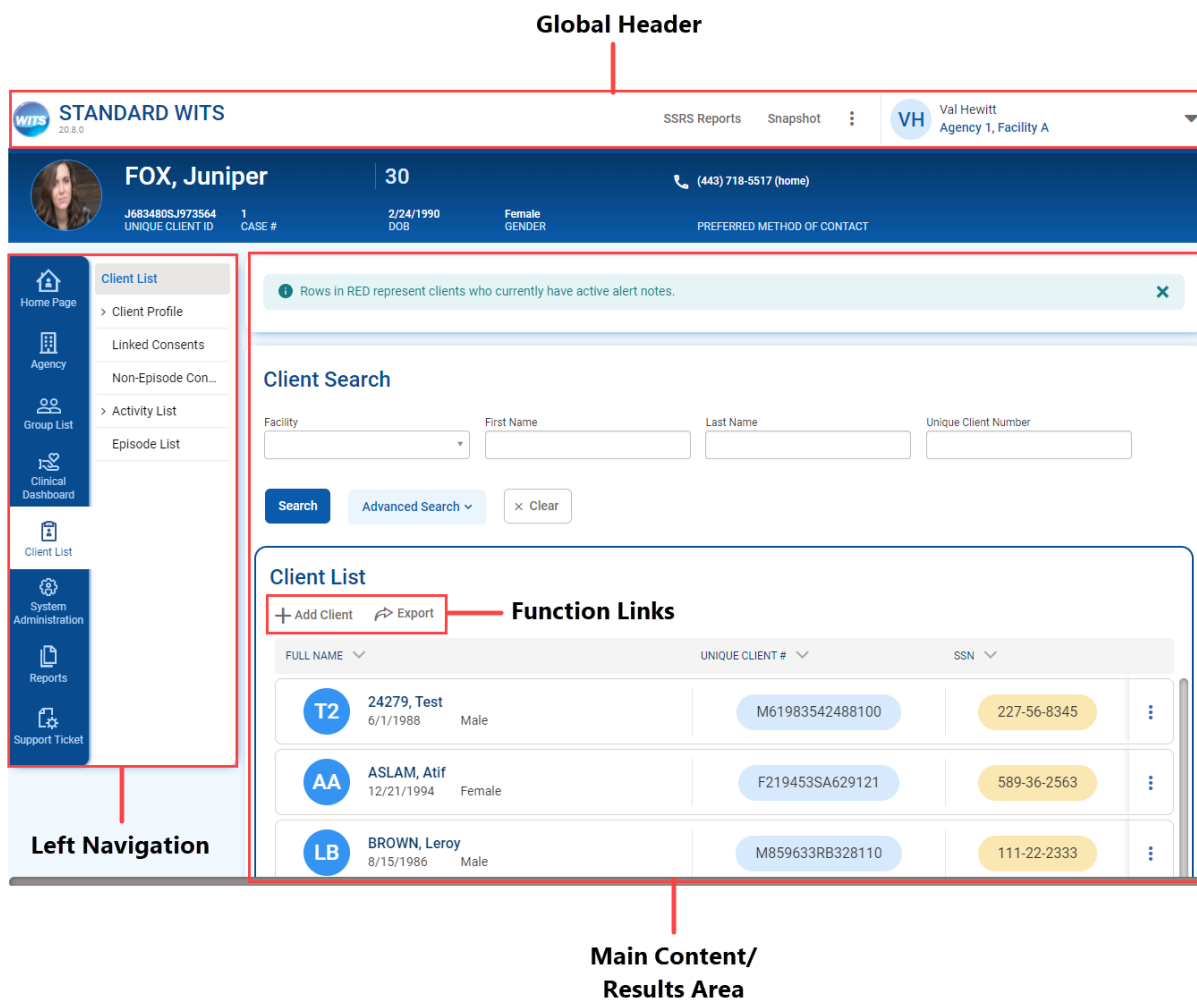


Figure 3-1: WITS User Interface Diagram

3.1.1 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 3-2: Global Header Features.

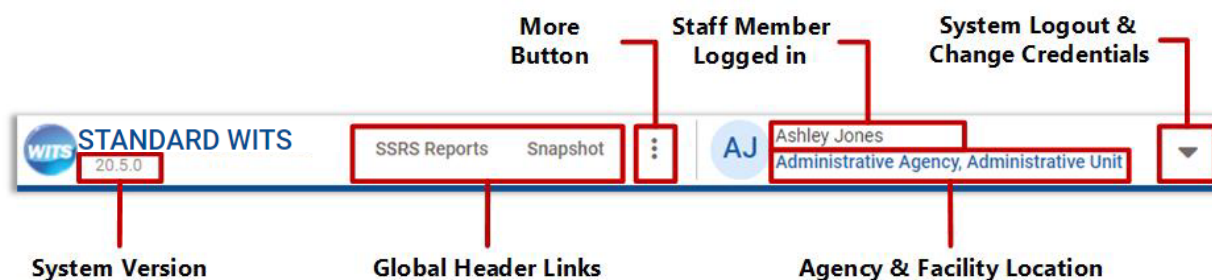


Figure 3-2: Global Header Features

STANDARD WITS

When clicking the ellipsis, the list will expand with additional options.

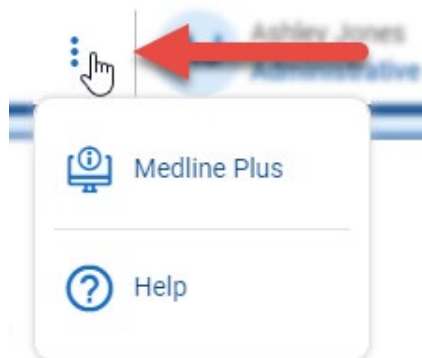


Figure 3-3: More Button in Header

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

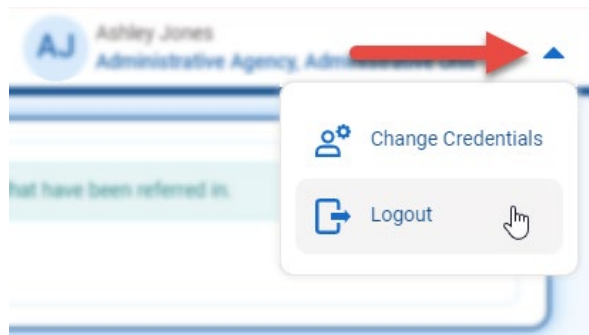


Figure 3-4: System Log out and change credentials

3.1.2 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.

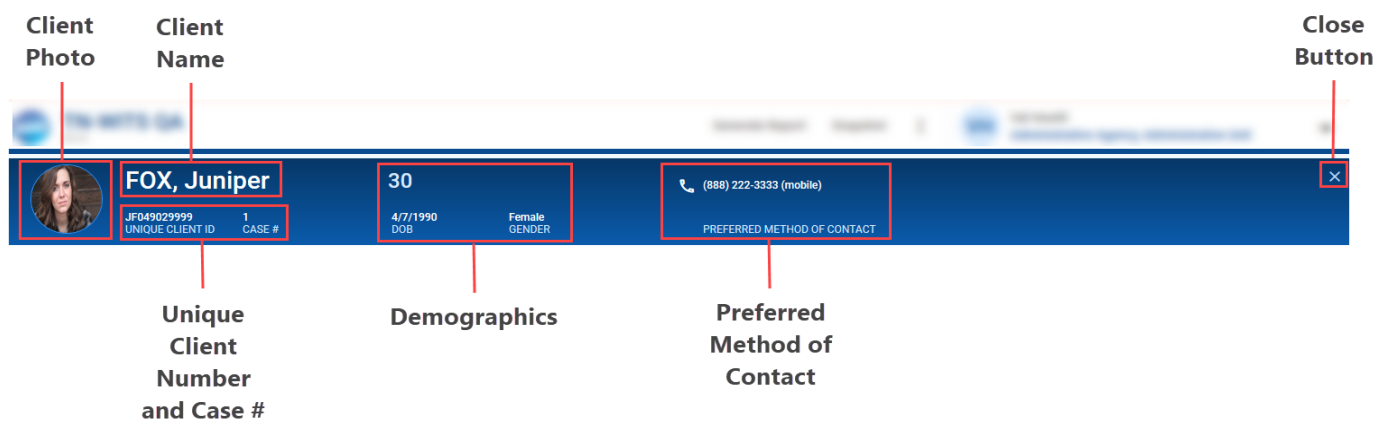
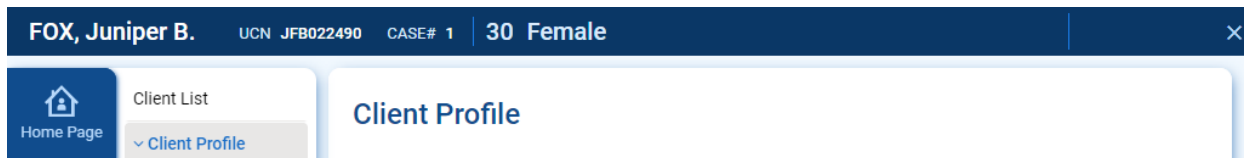


Figure 3-5: Client Context Diagram

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



3.1.3 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 now displays icons for each module.

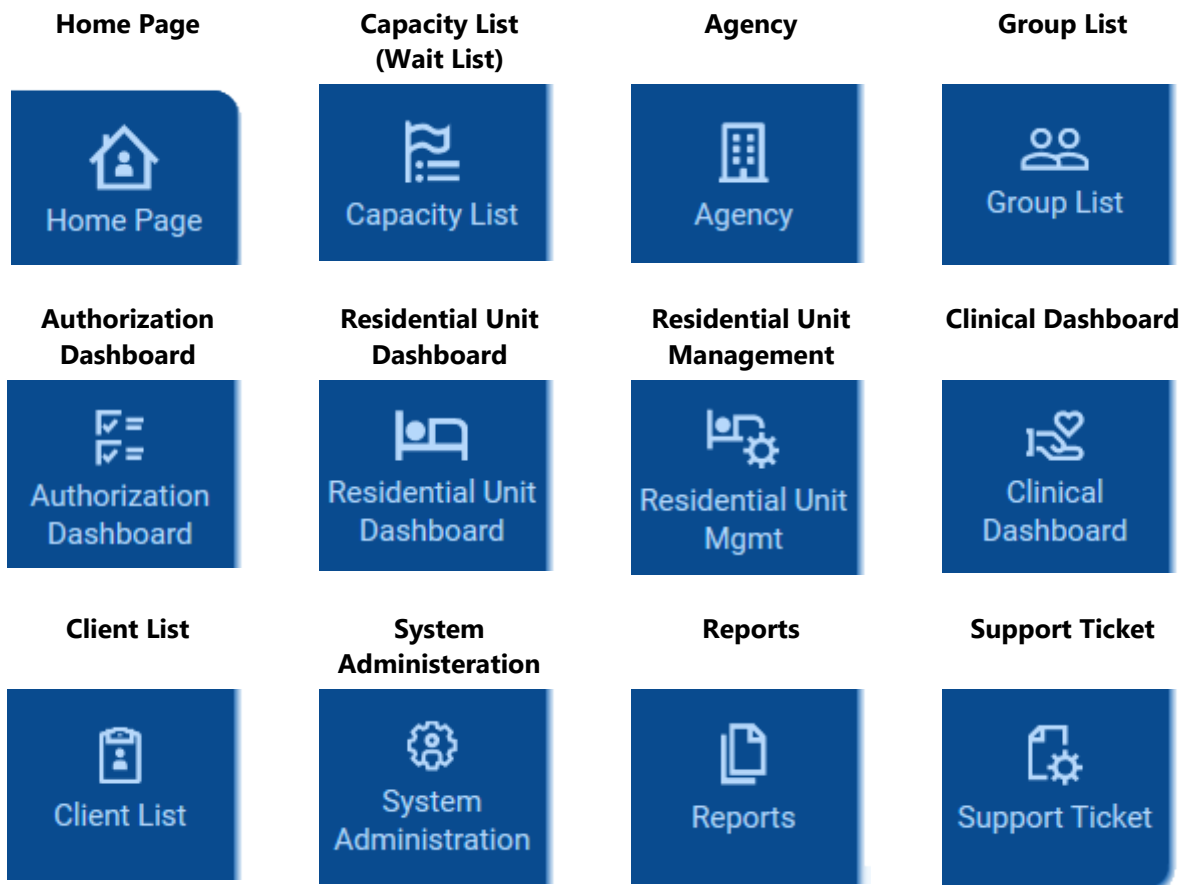


Figure 3-6: Left side navigation icons

- **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.

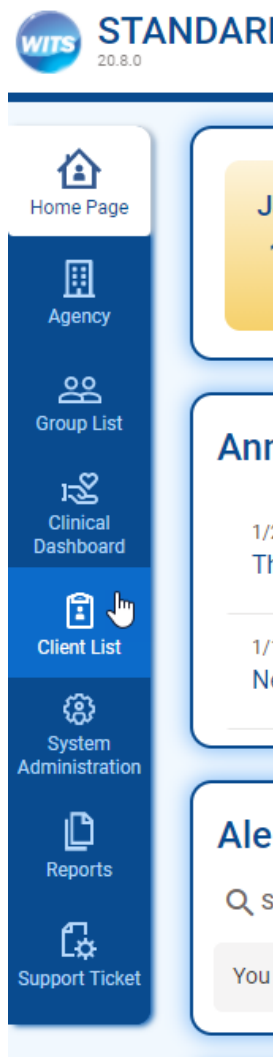


Figure 3-7: Hover Over Left Navigation Menu

- **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.

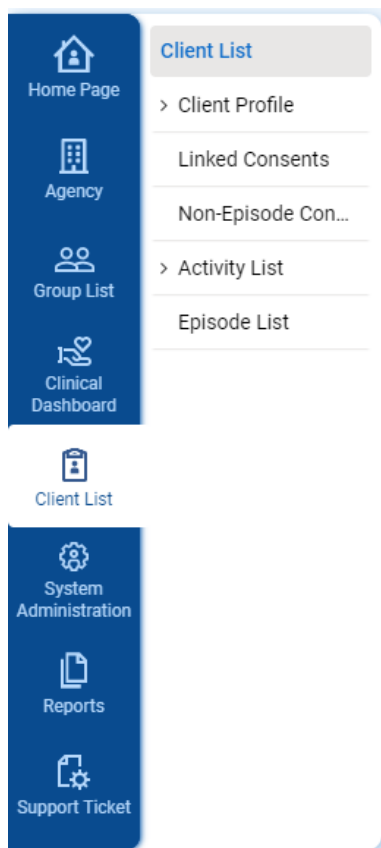


Figure 3-8: Left Navigation Bar with Expanded Menu

- **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.

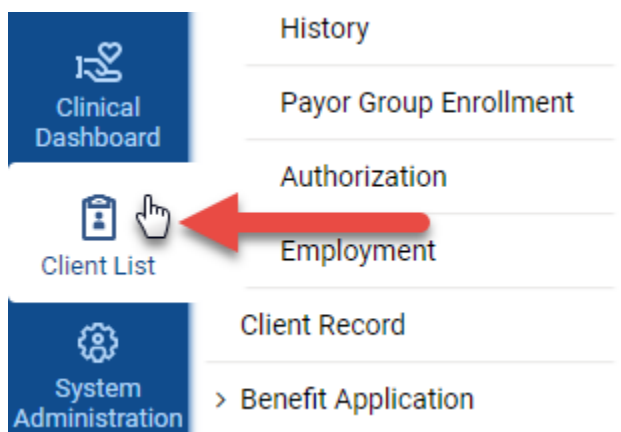


Figure 3-9: Click Left Menu Icon to Close Submenu

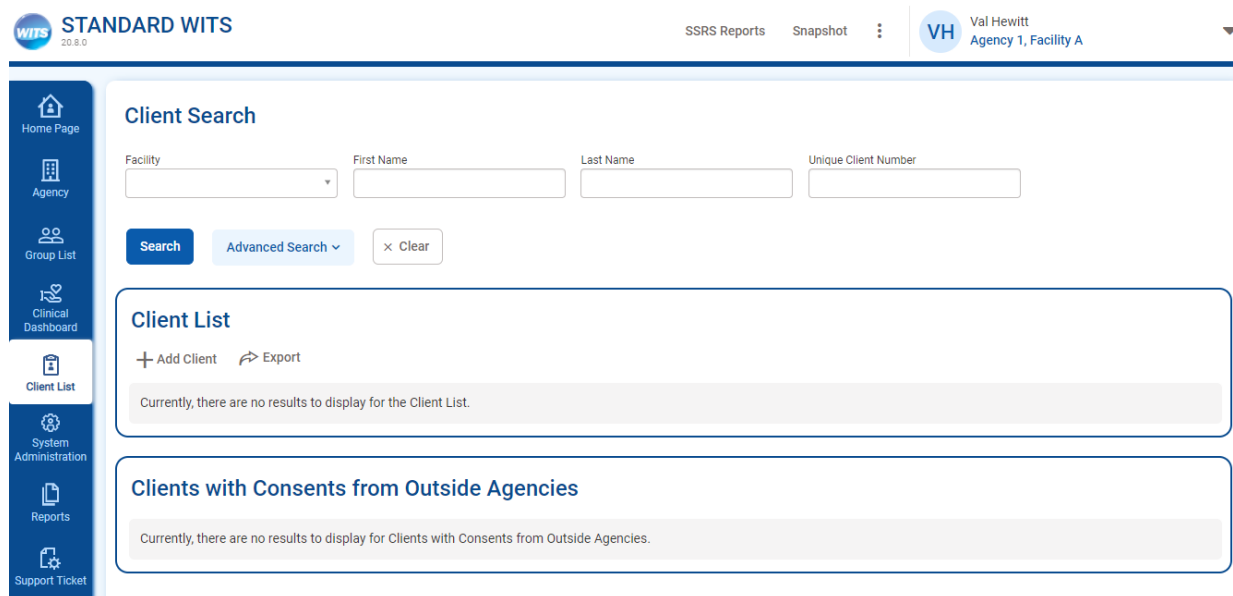


Figure 3-10: Screen with Left Menu Collapsed

- **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.

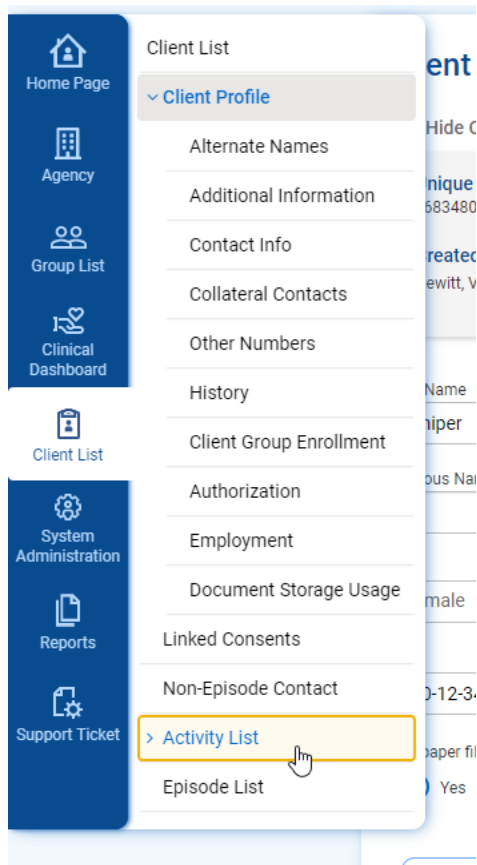


Figure 3-11: Submenu Sections

- **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.

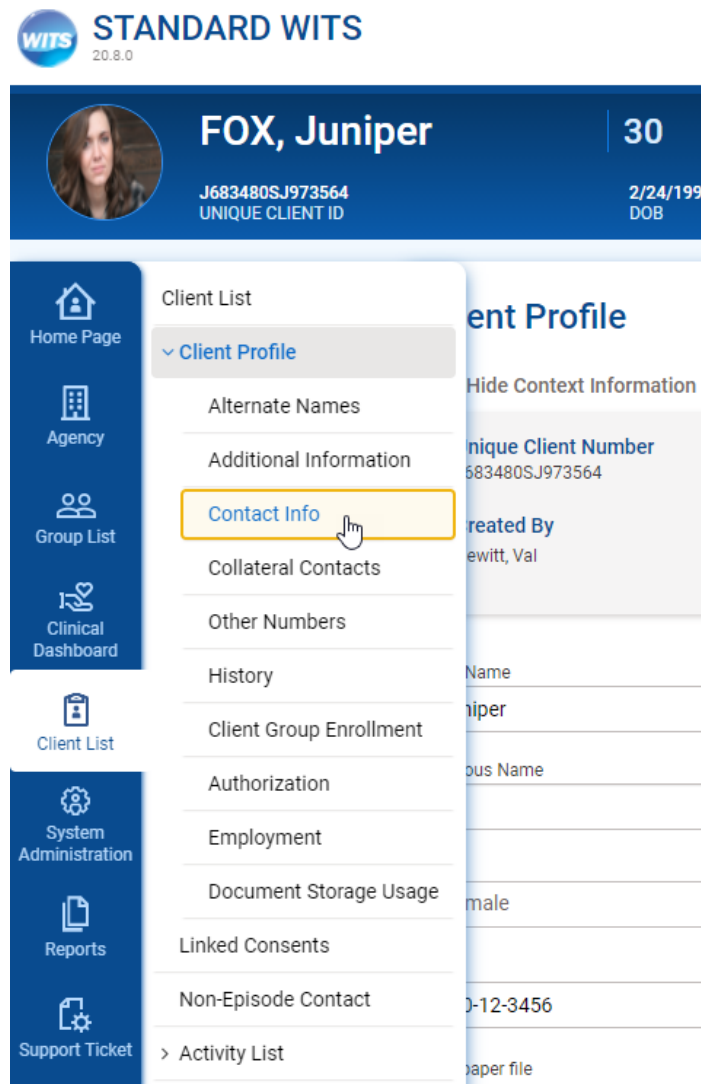


Figure 3-12: Hover over sub menu to expand

3.1.3.1 Navigating Through Screens

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 3-13: 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.

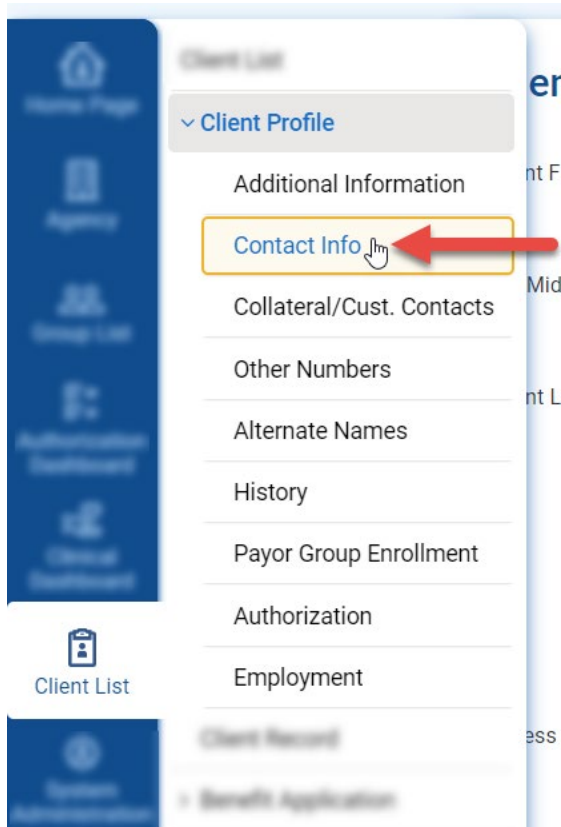


Figure 3-14: Left Side Navigation Sub Menu Navigation

3.1.4 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.

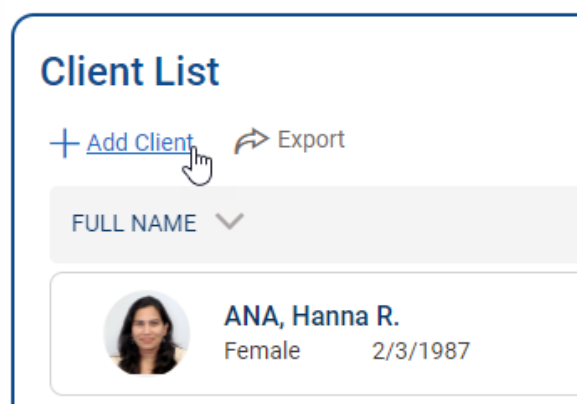


Figure 3-15: Function link for Add Client

3.2 Types of 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:

- **Login Screen:** Log into the software from your browser.
- **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.

3.2.1 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 move the login button within the bottom bar for easier user experience.

3.2.1.1 Production

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



Figure 3-16: Production login screen

3.2.1.2 Training

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



Figure 3-17: Training login screen

3.2.1.3 UAT

The login screen for the UAT environment will have an orange bar at the bottom of the login section.



Figure 3-18: UAT login screen

3.2.1.4 QA

The login screen for the QA environment will have a purple bar at the bottom of the login section.

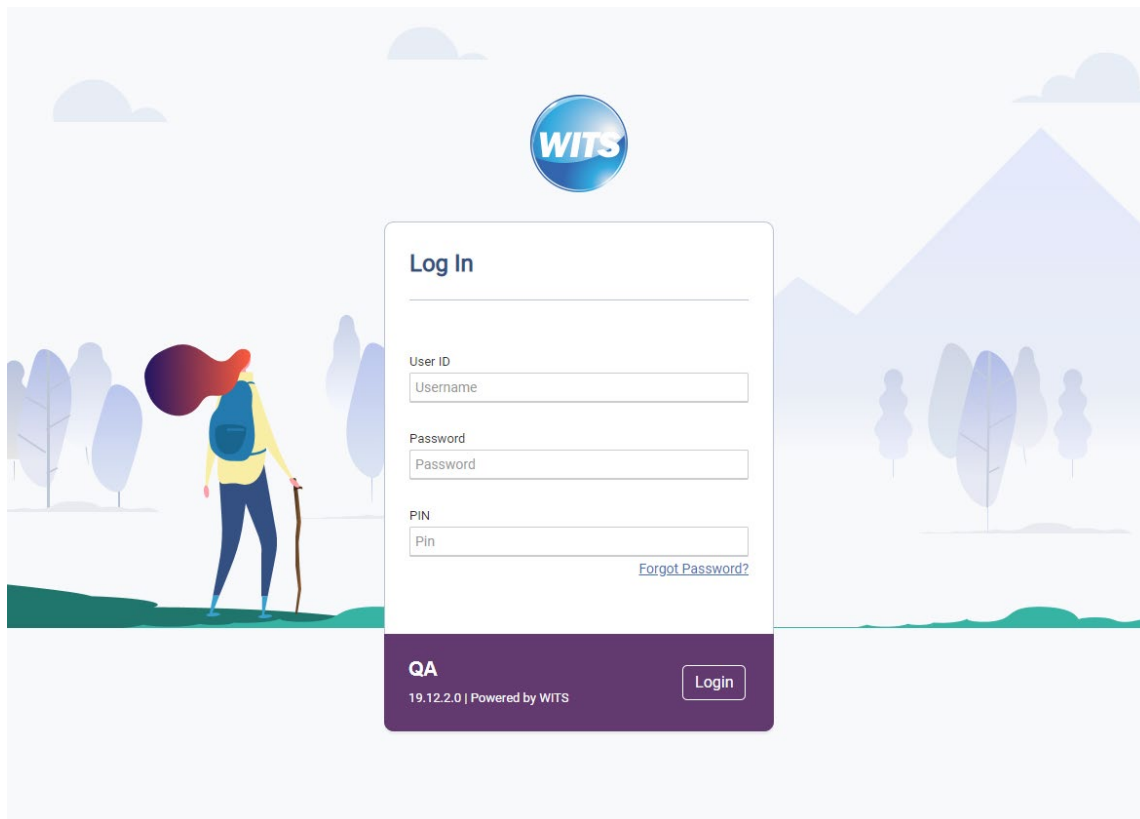


Figure 3-19: QA login screen

The WITS Warning screen will have the color bar for the environment below the warning.

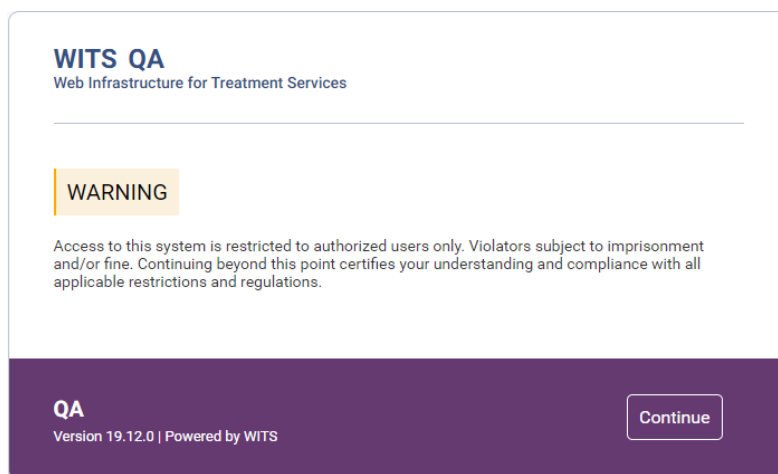


Figure 3-20: WITS Warning Screen

3.2.2 Home Page

The Homepage is the landing page when entering into WITS. Announcements, Alerts and Schedule are displayed for users to quickly see important information.

Key Change(s):

- New date and Hello section

Legacy UI

STANDARD WITS 18.30.0 | Administrative Agency, Administrative Unit | Jones, Sarah A., CCS | Logout

Snapshot

There is currently 1 person that has been referred in.

Home

Announcements

Actions	Summary	Posted Date	Start Date	Priority
	Welcome to PA WITS! This version of the PA WITS system is dedicated to the collection of TEDS data since September 2015. Policy bulletin, QSOA, and training resources can be found by clicking the PA WITS tab at www.ddap.pa.gov	5/12/2017 4:09 PM	5/12/2017	H

Alert List

Search Supervisee Alerts

Actions	Alert Type	Client Name: ID	Applies To Staff	Message	Facility	Date Due
	<input type="checkbox"/> Staff Recertification Due	N/A	Jones, Sarah A., CCS	Notifies Agency Administrator if Staff Certification is due		7/12/2017

Schedule for: Start Date: 7/3/2017 End Date: Refresh Search Calendar Edit/Add Schedule

Actions	Start	End	Summary	Status
	7/12/2017 11:30 AM	7/12/2017 12:00 PM	Client: Kabitan, Hosta (Age: 17) Procedure: 9100 Client Intake	Scheduled
	7/12/2017 3:00 PM	7/12/2017 4:00 PM	Client: Vera, Aloe (Age: 19) Procedure: 9100 Client Assessment	Scheduled

Figure 3-21: Legacy UI Home Page

New Design:

The screenshot displays the STANDARD WITS 2.0.0.0 homepage. The top header shows the user 'Val Hewitt' at 'Agency 1, Facility A'. The sidebar on the left contains navigation 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: 1. A top section with a date widget for 'January 19', a greeting 'Hello, Val', and a notification bar stating 'There are currently 2 support tickets with status Pending WITS Admin.'. 2. An 'Announcements' section with two entries: one dated 1/24/2017 1:58 pm about scoping to Mental Health agencies, and another dated 1/19/2021 3:05 pm about new user interface updates. 3. An 'Alert List' section with search filters and a message 'You have no alerts.'. 4. A 'Scheduler' section with search and date selection tools, and a table of scheduled events. The table has columns for START, END, SUMMARY, and STATUS. Two events are listed for 1/20/2021 at 3:00 pm and 3:30 pm, both for 'Client: FOX, Juniper' with a 'Scheduled' status.

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 3-22: New Homepage UI

3.2.3 Search Screen

Key Change(s):

- Placement of buttons now on left side
- The “Go” button has been replaced with “Search”
- Search fields are no longer compacted on screen
- Field names are located above the field
- An “Advanced Search” button is available, which displays all available search fields on the client list
- Pagination on search results

Figure 3-23: Client Search Screen

Advanced Search

On the client list search screen, users will notice search fields are no longer compacted on screen and fields are now displayed in four (4) columns instead of two (2). In addition, default search fields have been defined which are visible when the user access the screen. Customers can request FEI change the default search screens to other fields in your instance. An **Advanced Search** button is available to display all search fields.

Figure 3-24: Client Advanced Search Button

Client Search

Facility

First Name

Last Name

Unique Client Number

SSN

DOB

Client Id

Provider Client ID

Agency

Primary Care Staff

Treatment Staff

Intake Staff

Case Status

Number Type

Other Number

Include Only Active Consents

Agency 1

Yes No

All Clients

Yes No

Search

Advanced Search ^

× Clear

Figure 3-25: Advanced Search

Pagination

When search results are rendered, the results list will paginate. In Legacy WITS, all results appeared on the page, and sometimes required extensive scrolling. The results will now paginate, with 50 results per page. Pagination navigation will appear at the top and the bottom of the search results box.

Client List

+ Add Client

↗ Export

Showing 1 - 50 of 335

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

Showing 1 - 50 of 335

3.2.4 List Screen

List screens are located below Search screens, and can also be in other areas, such as the Activity List.

Key Change(s):

- Table sorting represented by arrows
- "Add" (+) icon added to section header buttons
- On List screens, the Actions column is now located on the right side
- Actions icon is now a vertical ellipsis, not the pencil icon
- On action rollover, action links are vertically stacked

3.2.4.1 Section Headers

For headers that are tables, an "add" (+) icon has been included to section header buttons that contain the word "Add", "Start", "Create", or "New". When scrolling through a list on screen, the list header will remain displayed at the top.

Legacy UI:

Client List (Export)					Add Client
Actions	Unique Client #	Full Name	DOB	SSN	Sex
	J693890LO763555	Khan, Amir	12/15/1994	785-41-2536	Female
	Q093257SO682554	Kohli, Viraat	6/15/1988	875-25-4123	Male

Figure 3-26: Client List Legacy UI

New UI:

For the client list, the first column is combining First, Last, DOB and Gender is same cell with the client name. ID fields have accent colored background. If a client picture is uploaded then it would display, otherwise it displays the initials of the client.



Client List				
+ Add Client ↗ Export				
FULL NAME ▾		UNIQUE CLIENT # ▾	SSN ▾	
 FAKE, Steven 1/1/1990 Male		Q553499EJ993544	555-55-5555	⋮
 FOX, Juniper 2/24/1990 Female		J683480SJ973564	000-12-3456	⋮

Figure 3-27L Client List New UI

3.2.4.2 Navigating with List Results

Key Change(s):

- On List screens, the Actions column is now located on the right side
- Actions icon is now a vertical ellipsis, not the pencil icon
- On action rollover, action links are vertically stacked

Legacy UI:

Client List (Export) Add Client					
Actions	Unique Client #	Full Name	DOB	SSN	Sex
	F140222OF220220	Fox, Juniper R	1/24/2002	333-11-2222	Female
<div> Profile Activity List Linked Consents </div>					

To Navigate within the updated Client List screen, rows are highlighted when cursor moves over the row. If a client's row is pink, that means that the client has an alert on their record.

Client List			
+ Add Client Export			
FULL NAME		UNIQUE CLIENT #	SSN
DC	CHAUHAN, Deepika 11/15/1994 Female	F159462HCS39111	875-25-3652
SF	FAKE, Steven 1/1/1990 Male	Q553499EJ993544	555-55-5555
	FOX, Juniper 2/24/1990 Female	J683480SJ973564	000-12-3456
DJ	JAIN, Dipak 12/24/1997 Male	M249713AJ249121	785-25-4123
SJ	JAIN, Shruthi 12/6/1994 Female	F269442AJ159101	852-36-5412
JJ	JONES, Johnny 8/15/1990 Male	M859084OJ319110	132-89-1834

Figure 3-28: 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.

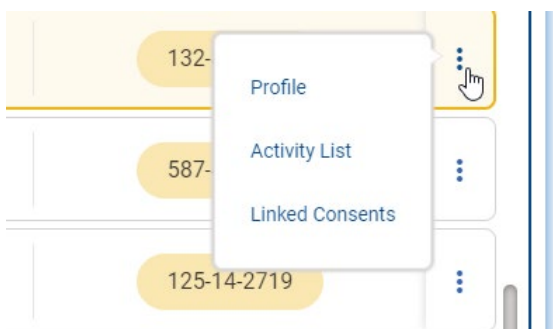


Figure 3-29: Hover Over Menu Icons in Client List

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

Legacy UI:





Client Activity List				
Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	11/13/2018	12/19/2018	In Progress (Details)
	Intake Transaction	11/13/2018	12/19/2018	Completed
	Client Program Enrollment (New_Mat-Evidence)	11/15/2018	12/19/2018	Completed
	Encounter Summary	2/12/2019	12/4/2018	Completed

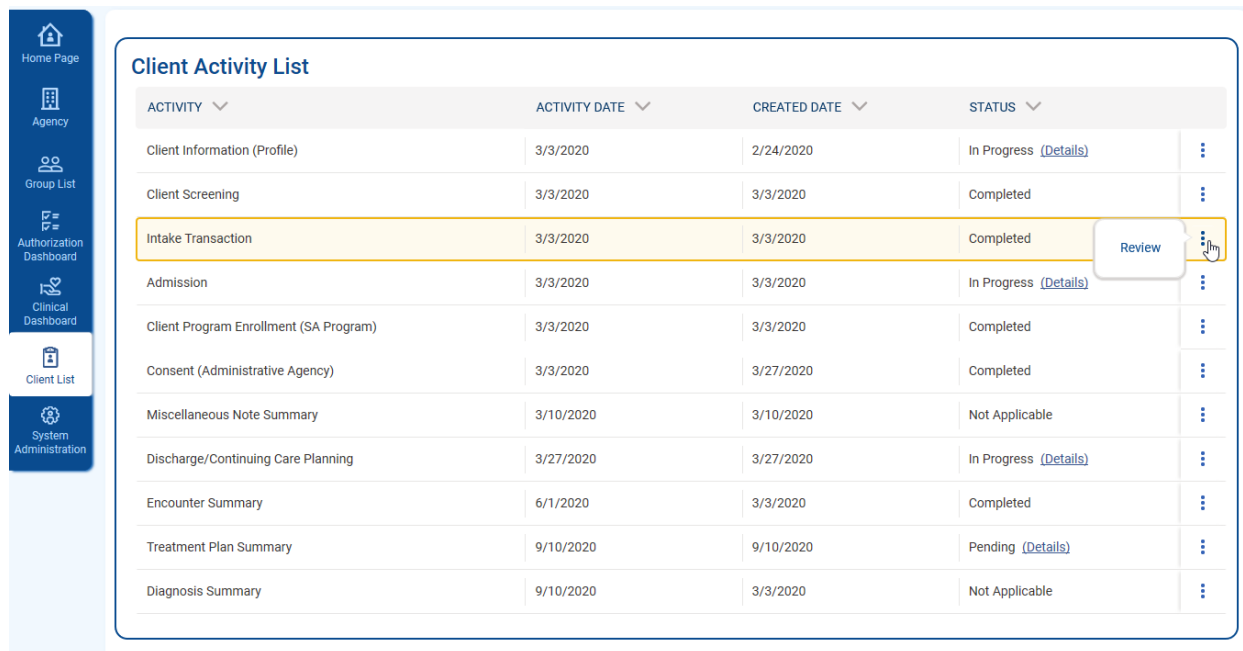
Figure 3-30: Legacy UI Client Activity List

New UI:

Client Activity List				
ACTIVITY	ACTIVITY DATE	CREATED DATE	STATUS	
Client Information (Profile)	3/3/2020	2/24/2020	In Progress (Details)	⋮
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 (Details)	⋮
Client Program Enrollment (SA Program)	3/3/2020	3/3/2020	Completed	⋮

Figure 3-31: Client Activity List New UI

To access the Client Activity Menu (formerly the pencil icon in the legacy UI) hover over the ellipsis icon.



ACTIVITY ▾	ACTIVITY DATE ▾	CREATED DATE ▾	STATUS ▾	
Client Information (Profile)	3/3/2020	2/24/2020	In Progress (Details)	⋮
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 (Details)	⋮
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 (Details)	⋮
Encounter Summary	6/1/2020	3/3/2020	Completed	⋮
Treatment Plan Summary	9/10/2020	9/10/2020	Pending (Details)	⋮
Diagnosis Summary	9/10/2020	3/3/2020	Not Applicable	⋮

Figure 3-32: hover Over Menu Icon Client Activity List

3.2.5 Profile Screen

The profile screens show basic information about the client, and information about encounters recorded.

Key Change(s):

- Placement of buttons is now located on the left side
- Administrative Actions highlighted and now on left side above buttons
- Field Labels on top of field
- Updated fields and buttons (see sections 3.5 and 3.6 for more information)
- Ability to add client photo
- Required fields have an orange bar on the left

3.2.5.1 Client Profile

Legacy UI:

The screenshot displays the 'Legacy UI' for the 'Client Profile' screen. On the left is a blue sidebar menu with the following items: Home Page, Agency, Group List, Client List (expanded), Client Profile (expanded), Alternate Names, Additional Information, Contact Info, Collateral Contacts, Other Numbers, History, Authorization, Employment, Allergies, Linked Consents, Non-Episode Contact, Activity List, Episode List, System Administration, Reports, and Support Ticket. The main content area is titled 'Profile' and contains two columns of form fields. The left column includes First Name, Middle Name, Last Name, Mother's Maiden Name, Suffix, Sex, Gender Identity, DOB, SSN, Driver's License, and Has paper file. The right column includes Provider Client ID, Unique Client Number, State Client ID, Record Created By, Last Updated By, Created Date, and Last Updated Date. Below these fields is an 'Administrative Actions' section. At the bottom right are four buttons: Cancel, Save, Finish, and a next button.

New UI:

⚠ DO NOT use any real client data. This is NOT a live production site.

STANDARD WITS
Web-based Health Screening

[Generate Report](#) [SSRS Reports](#) [Documents \(0\)](#) [Snapshot](#) ⋮

VH

 Val Hewitt
 Agency 1, Facility A

FOX, Juniper

J6834805_J773564
UNIQUE CLIENT ID

30

2/24/1990
DOB

Female
GENDER

(443) 718-5517 (home)
PREFERRED METHOD OF CONTACT

- Home Page
- Agency
- Group List
- Clinical Dashboard
- Client List
- System Administration
- Reports
- Support Ticket

[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 J6834805_J773564	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

J

Juniper

Middle Name

Last Name

F

FOX

Suffix

Previous Name

Mother's Maiden Name

Sex

F

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

[< Back](#) [Next >](#)

[Save](#) [Save and Finish](#) [x Cancel](#)

[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

Alternate Names

+ Add

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

[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

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 3-33: WITS Client Profile Screen

3.2.5.2 Client Profile Photo

WITS now 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.

Upload Profile Image

Choose File

No file chosen

Upload

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

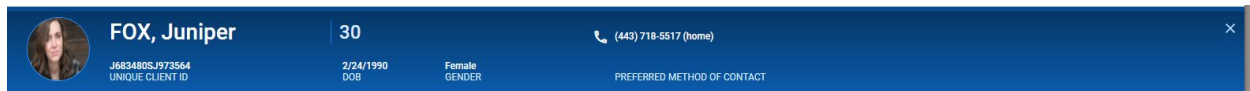
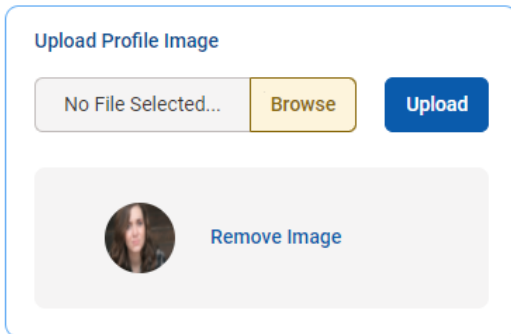


Figure 3-34 Client Photo in Header

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.



3.2.5.3 Encounter Screen

The Encounter Screen is another type of a profile screen within WITS, and the new UI applies to all profile screens.

Legacy UI:

Encounter

Note Type

ENC ID

Program Name

Service

Created Date

Billable **No**

Start Date

End Date

Start Time

End Time

Duration

Service Location

Emergency

Pregnant

of Service Units/Sessions

Diagnoses for this Service

Primary

Secondary

Tertiary

Rendering Staff

Secondary Staff

Supervising Staff

Unsigned Notes

Sign Note

Allow Disclosure of Note

Signed Notes

Administrative Actions

[Finalize Encounter](#)

Cancel

Save

Finish

New UI:

WITS STANDARD WITS 20.0.0

Generate Report SSRS Reports Snapshot

VH Val Hewitt Agency 1, Facility A

FOX, Juniper

30

(443) 718-5517 (home)

UNIQUE CLIENT ID 1 CASE #

2/24/1990 DOB

Female GENDER

PREFERRED METHOD OF CONTACT

Home Page

Agency

Group List

Clinical Dashboard

Client List

System Administration

Reports

Support Ticket

Client List

> Client Profile

Linked Consents

Non-Episode Con...

> Activity List

Intake

> Drug Testing

Tx Team

> Screening

CONTINUUM ...

> Assessments

> ASAM

> Admission

> Outcome Mea...

Program Enroll

Diagnosis List

> Encounters

Profile

Encounter ...

Services

> Notes

> Treatment

> Continuing Care

> Discharge

Consent

Referrals

Payments

Episode List

Encounter

Hide Context Information

ENC ID Created Date

Note Type Case Management Note Billable Yes No

Program Name

Service

Start Date End Date Start Time End Time

Duration # of Service Units / Sessions

Service Location

Emergency Yes No

Pregnant Yes No Medication(s) Documented Yes No Medication(s) Not Documented Reason

Diagnoses for this Service

Primary Select an option

Secondary Select an option

Tertiary Select an option

Well Visit, No Known Problems Yes No Diagnosis (Problem List)

Rendering Staff Hewitt, Val

Secondary Staff

Supervising Staff

< Back Next > Save Save and Finish X Cancel

Administrative Actions

Release to Billing

3.2.6 Enhanced Architecture (EA) Screens

The Enhanced Architecture (EA) screens were built after the legacy screens. They have a more updated look, and therefore did not need as many updates. These screens were updated to the new UI, including the changes to required fields, drop down choices and mover boxes.

In addition, the left side menu will now stay open when accessing the EA screens.

3.2.6.1 Staff Members

Key Change(s):

- Table sorting represented by arrows
- “Add” (+) icon added to section header buttons
- On List screens, the Actions column is now located on the right side
- Actions icon is now a vertical ellipsis, not the pencil icon
- On action rollover, action links are vertically stacked

Legacy EA:

First Name	Last Name	Agency	Status	Email	Identifier	Start Date	Termination Date
Admin	User	Administrative Agency	Active	noreply@feisystems.com	admin		
System	User	Administrative Agency	Active	noreply@feisystems.com	system		
Pre-WITS Migration	Process	Administrative Agency	Active	rodney.conrad@feinfo.com	PProcess-105		
David	Webb	Administrative Agency	Active	david.webb@feisystems.com	dwebb		
David	Webb2	Administrative Agency	Active	david.webb@feisystems.com	d		
Robert	Rhinehart	Administrative Agency	Active	Robert.Rhinehart@feisystems.com	rrhinehart	11/01/2018	
Robert	Treatment001	Administrative Agency	Active	robert.rhinehart@feisystems.com	rtreatment001	10/01/2018	
RR	Treatment002	Administrative Agency	Active	robert.rhinehart@feisystems.com	rtreatment002	10/01/2018	
RR	GrantDataEntry001	Administrative Agency	Active	robert.rhinehart@feisystems.com	rrGrantDataEntry001	10/01/2018	
Uche	Amadi	Administrative Agency	Active	Uchechukwuka.Amadi@feisystems.com	uamadi		
Nicole	Arnett	Administrative Agency	Active	Nicole.Arnett@feisystems.com	namett		
Corey	Atanda	Administrative Agency	Active	Corey.Atanda@feisystems.com	catanda		

New UI:

⚠ DO NOT use any real client data. This is NOT a live production site.

WITS California Demo QA
19.12.0
Snapshot
PK
Pramathi R. Katanguri, MS
Administrative Agency, Admin Unit

Home Page
Agency
Group List
Authorization Dashboard
Clinical Dashboard
Client List
System Administration
Reports
Support Ticket

Staff Member Search

[+ Create New Staff Member](#)

Search
Search

Showing 1-50 of 81

1
2
3

Select Columns ⌵
 Select View ⌵
Export Results

FIRST NAME	LAST NAME	AGENCY	STATUS	EMAIL	IDENTIFIER	START DATE	TERMINATION DATE
Robin	Hood	Admin Agency	Active	noreply@feisystems.com	admin	01/15/2020	⋮
Robin	Hood	Admin Agency	Active	noreply@feisystems.com	admin	01/15/2020	⋮
Robin	Hood	Admin Agency	Active	noreply@feisystems.com	admin	01/15/2020	⋮
Robin	Hood	Admin Agency	Active	noreply@feisystems.com	admin	01/15/2020	⋮
Robin	Hood	Admin Agency	Active	noreply@feisystems.com	admin	01/15/2020	⋮
Robin	Hood	Admin Agency	Active	noreply@feisystems.com	admin	01/15/2020	⋮
Robin	Hood	Admin Agency	Active	noreply@feisystems.com	admin	01/15/2020	⋮
Robin	Hood	Admin Agency	Active	noreply@feisystems.com	admin	01/15/2020	⋮

3.2.6.2 Staff Member Workspace

Key Change(s):

- Styling updated to new UI

Legacy EA:

Standard SOR QA
20.7.0
Administrative Agency, Administrative Unit
Hewitt, Val
Logout

Back to Search
Staff Member Workspace
EDIT
SHOW DETAILS

Profile »
 Employment Profile
 User Account
 Contact Information
 Identifiers
 Domains

Profile

Hewitt, Val
 Female
 Date of Birth:

Employment Profile

Job Title:	Staff Member Type: Administrator	Employment Type:	Employment Date Range: 01/01/2020
Full Time Equivalent:			
Taxonomy Type:			
Taxonomy Classification:			
Taxonomy Specialization:			
Relationships:			

User Account

User ID: vhwitt

System Roles:

- SSRS Agency User
- SSRS Cross Agency User
- User Controlled Configuration
- WITS Administrator

- SSRS Cross Agency Reader
- SSRS FEI Viewer
- View Scheduler

Additional items

- > Define Employment Profile
- > Manage Accounts and Roles
- > Add Facility Assignment
- > Add Professional Qualification
- > Add Email
- > Add Phone Number
- > Add Address
- > Add Identifier
- > Add Language
- > Add Checklist Item
- > Add Relationship
- > Add Training
- > Add Note
- > Add Domain

New UI:

STANDARD WITS 20.8.0

SSRS Reports Snapshot

VH Val Hewitt
Administrative Production Agency

Staff Member Workspace

Profile

USER, Admin, Other Value

Date of Birth: Not Collected

Employment Profile

Job Title: Other Value

Staff Member Type: Administrative Staff

Employment Type: special employment type

Employment Date Range: 01/01/2009

Full Time Equivalent: Taxonomy Type: Taxonomy Classification: Taxonomy Specialization:

Relationships:

Relationship to this Staff Member: Manager

Related Staff Member: User, Admin

User Account

User ID: admin

System Roles:

- View Scheduler

Agency Roles:

- Agency Administrator
- Client Diagnosis (Full Access)

Contact Information

Preferred Method Of Contact:

noreply@feisystems.com Primary

Additional Items

- Define Employment Profile
- Manage Accounts and Roles
- Add Facility Assignment
- Add Professional Qualification
- Add Email
- Add Phone Number
- Add Address
- Add Identifier
- Add Language
- Add Checklist Item
- Add Relationship
- Add Training
- Add Note
- Add Domain

3.2.6.3 EA Treatment Plan

The EA Treatment Plan

Treatment Plan Screen

Key Change(s):

- Updated Styling

Legacy EA:

STANDARD WITS 18.33.0

Administrative Agency, Administrative Unit

Jones, Ashley Logout

Rose, Daisy | F469031OR249110 | 1

SSRS Reports Snapshot

Treatment Plan

Add Treatment Plan

Treatment Plan:

Status: No Items

Active Timespan: Next Review:

New UI:

The screenshot displays the new WITS user interface. At the top, a blue header bar contains the user's initials 'JF', the name 'FOX, Juniper', and the age '40'. Below this, a navigation sidebar on the left lists various functions: Home Page, Agency, Group List, Clinical Dashboard, Client List, System Administration, Reports, and Support Ticket. The main content area is titled 'Treatment Plan' and includes a '+ Add Treatment Plan' button. A large, empty rectangular box is present, likely for displaying treatment plan details.

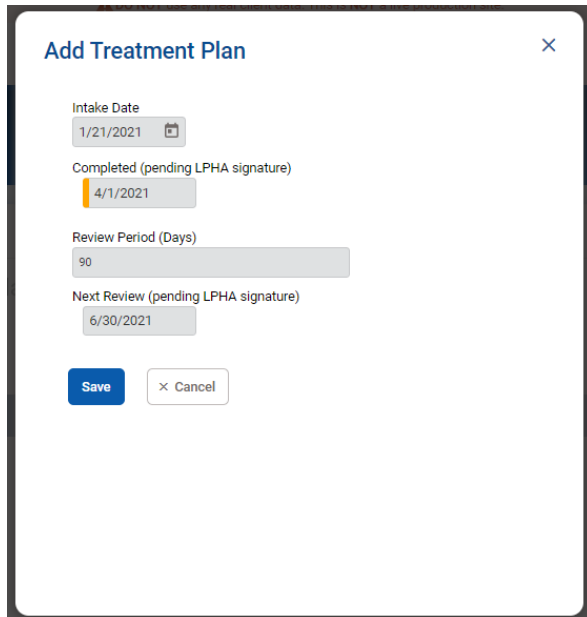
Add Treatment Plan Pop-up

Key Change(s):

- Updated Styling

Legacy EA:

The screenshot shows the legacy WITS user interface. A pop-up window titled 'Add Treatment Plan' is displayed. It contains the following fields and options: 'Active Timespan' with a date range from 06/30/2017 to an empty date field, a checked 'Has end date' checkbox, 'Review Period (Days)' set to 30, and 'Next Review Date' set to 7/28/2017. There is also an unchecked checkbox for 'Copy values from Active Plan if available.' At the bottom, there are 'Save' and 'Cancel' buttons.

New UI:


Add Treatment Plan [X]

Intake Date
1/21/2021

Completed (pending LPHA signature)
4/1/2021

Review Period (Days)
90

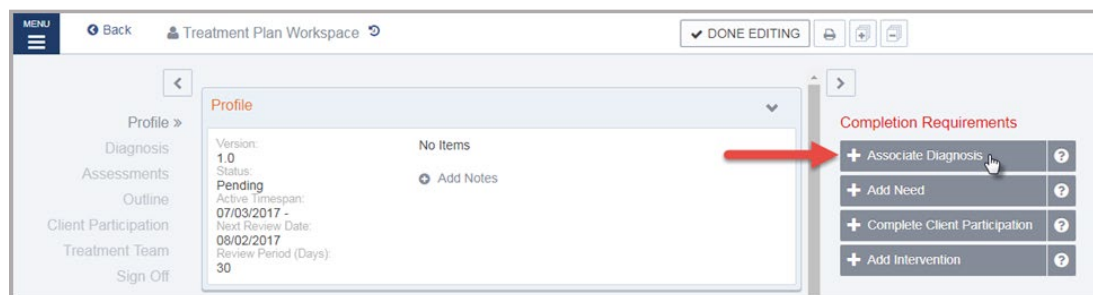
Next Review (pending LPHA signature)
6/30/2021

Save [X] **Cancel**

Treatment Plan

Key Change(s):

- Updated Styling

Legacy EA:


MENU [Back] Treatment Plan Workspace [DONE EDITING] [Print] [Add] [Edit]

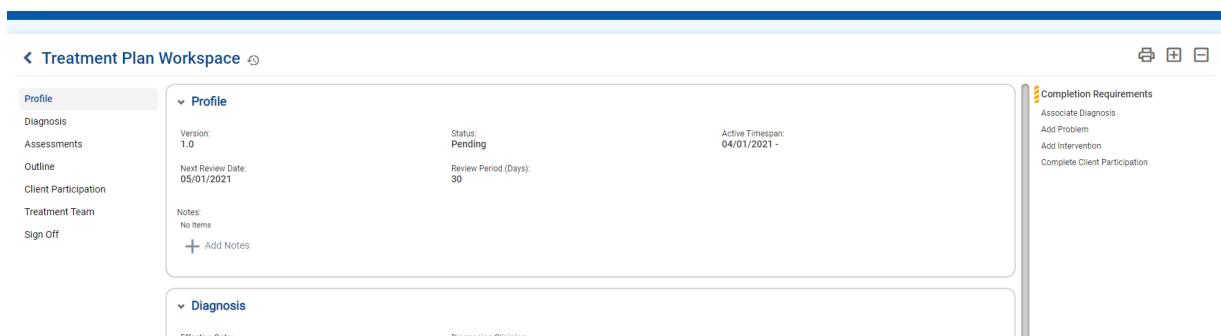
Profile > [v]

Version: 1.0
Status: Pending
Active Timespan: 07/03/2017 - 08/02/2017
Next Review Date: 08/02/2017
Review Period (Days): 30

No Items
Add Notes

Completion Requirements

- + Associate Diagnosis ?
- + Add Need ?
- + Complete Client Participation ?
- + Add Intervention ?

New UI:


< Treatment Plan Workspace [Print] [Add] [Edit]

Profile [v]

Version: 1.0
Status: Pending
Active Timespan: 04/01/2021 -
Next Review Date: 05/01/2021
Review Period (Days): 30

Notes:
No Items
+ Add Notes

Diagnosis

Effective Date: Diagnosing Clinician:

Completion Requirements

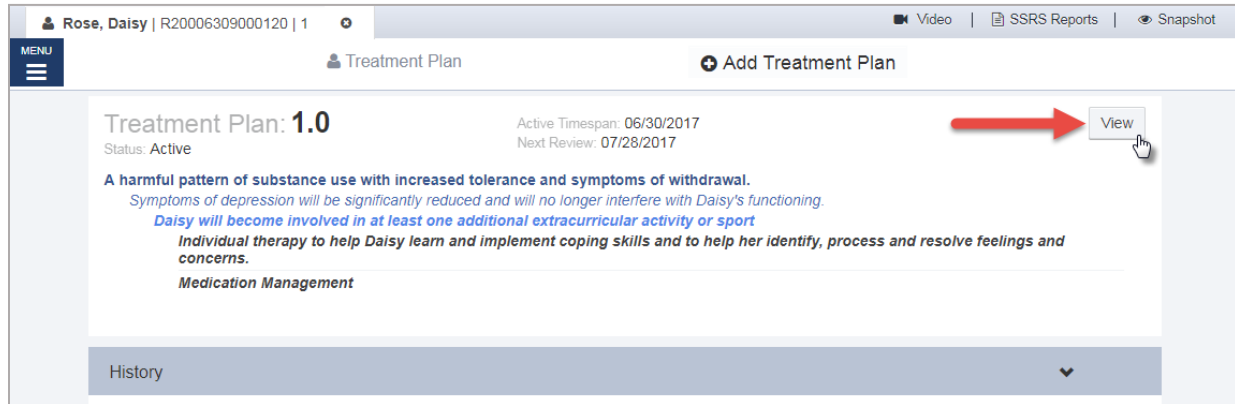
- Associate Diagnosis
- Add Problem
- Add Intervention
- Complete Client Participation

Completed Treatment Plan

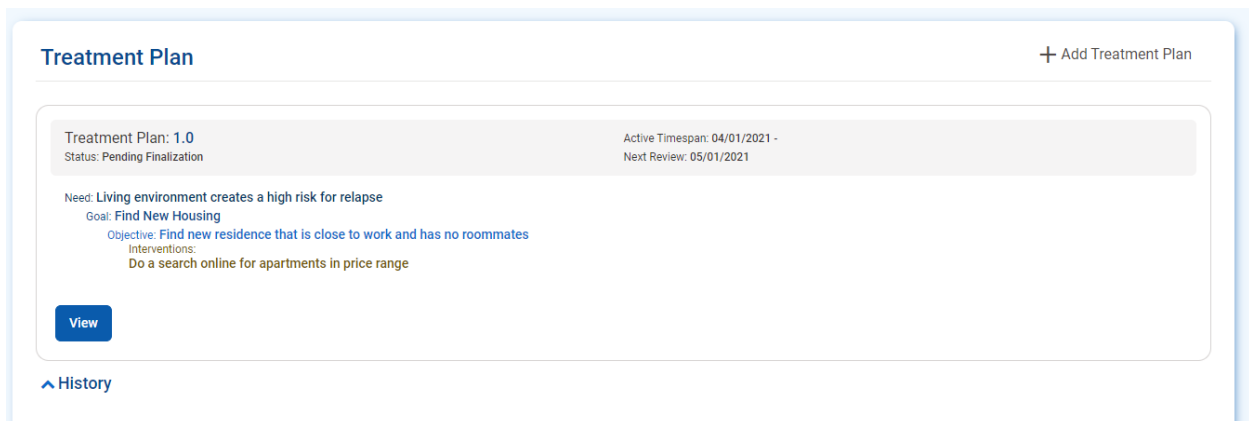
Key Change(s):

- Updated Styling
- View Button moved from the right side to the bottom of the Treatment Plan.

Legacy EA:

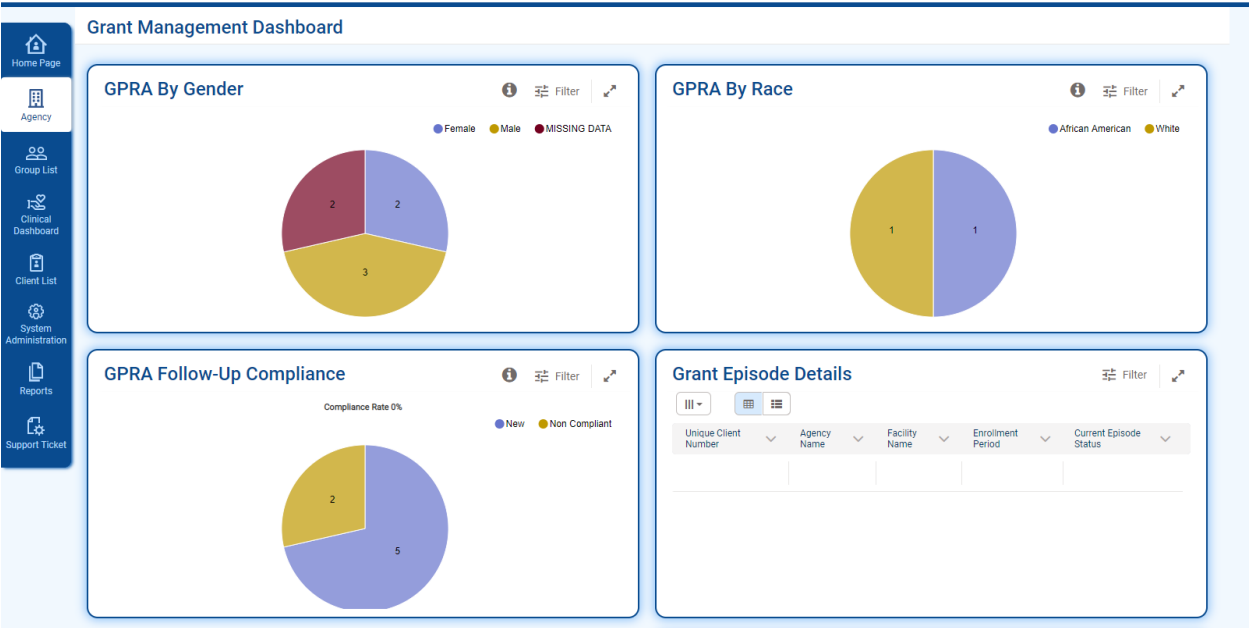


Legacy EA:



3.2.6.4 Grant Management Dashboard

The grant dashboard is a new screen for SOR customers. The dashboard shows a snapshot of GPRA Data, including GPRAs 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.






3.3 Alerts/Notifications

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

Legacy UI:





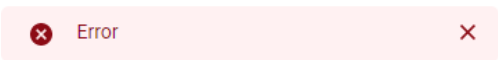
Table 2: Legacy System Alerts

System Alert/Notification	Description
 The filter you created has been applied to the client list.	Informational: This notification message informs users that something has occurred.
 This client record is in a different facility.	Warning: This notification message warns the user that entered data falls outside of a certain parameter. The record can still be updated.
 Required fields are missing.	Warning Elevated: This type of notification is a higher warning message that needs to stand out more.

New UI:

Table 3: New UI System Alerts Styling

System Alert/Notification	Description
---------------------------	-------------

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

3.4 Buttons

Key Change(s):

- Colors have been updated to blue theme
- Cancel button placement
- Finish is now "Save and Finish"
- Back and Next buttons updated with text.

3.4.1 Save, Save and Finish

Legacy UI:



Figure 3-35: Legacy UI Cancel, Save and Finish Buttons

New UI



Figure 3-36: Save, Save and Finish and Cancel buttons

3.4.2 Administrative Actions

Legacy UI:



Figure 3-37: Legacy UI Administrative Actions

New UI:

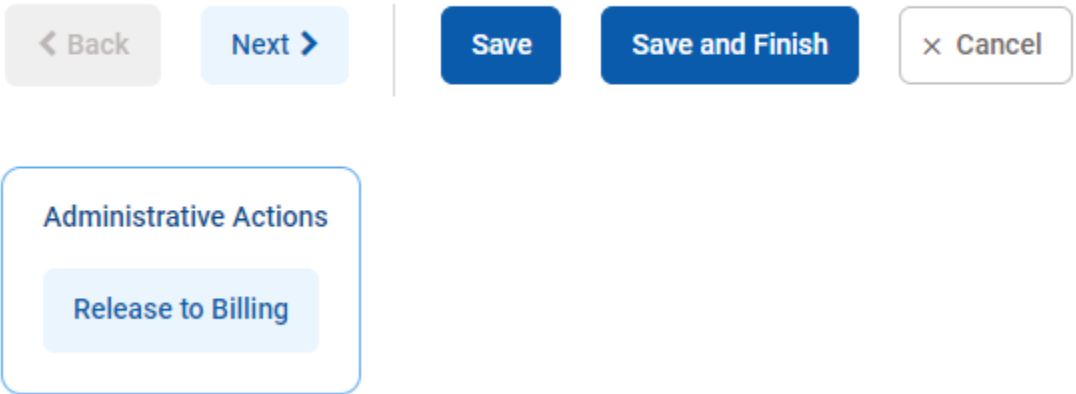


Figure 3-38: New UI Administrative Actions

3.4.3 Back and Next

The **Back** and **Next** buttons clearly indicate additional screens for the user to progress through.

Legacy UI:



Figure 3-39: Legacy UI Back and Next Buttons

New UI:

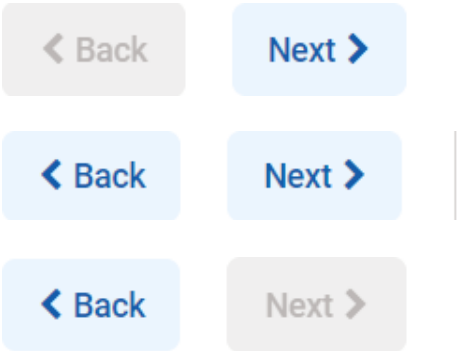




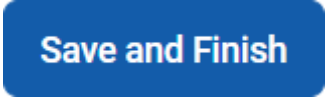
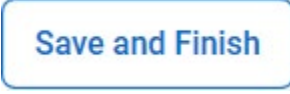

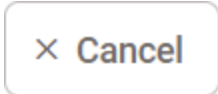








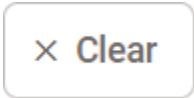



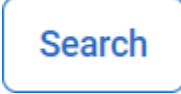




Figure 3-40: Back and Next buttons

When hovering over buttons with your mouse, the selected button will change in appearance. The table below illustrates the change:

Legacy UI	Button	Selected Button	Functionality
			Saves data entered and remains on the current screen.
			Saves data entered and returns to the section start page.
			Cancels the current action and returns to the previous screen.
			Navigate through the screens in each section (left and right arrow buttons).
			Moves data from one mover box to another (mover buttons).
			Clears all criteria from search fields.
			Run the search screen using the criteria entered in the search fields.
			Expand search options

3.4.4 Text Link

Functionality: Text links can be blue or grey, depending on placement and prominence needed. By default, the link is grey, unless the link is located within the body of a form. When you hover over a link with your mouse, the link will turn blue.

Key Update:

- Plus (+) button added to the left of the link for any add/create action link

Legacy UI:

[Create Referral Using this Disclosure Agreement](#)

New UI:

+ Create Referral Using this Disclosure Agreement

+ [Create Referral Using this Disclosure Agreement](#)

3.5 Fields

Key Change(s):

- Label placement for each field is now located above the field
- Required for Completion and Required for Save indicators have changed to the left side
- Yes/No fields now represented as Radio Buttons

3.5.1 Text Inputs

Functionality: Input text into a field.

Key Change(s):

- Label placement for each field is now located above the field
- Required for Completion and Required for Save indicators have changed to the left side

Medicaid #

3.5.2 Required Fields

Key Change(s):

- Easier to distinguish between fields required to save versus required for completion
- When a field is focused, it becomes a bold outlined in blue; it is more prominent than before.

Required to Save: Solid bar on left side

- Indicates items required to save the screen.

Required for Completion (Reporting required): Striped bar on left side

- Indicates items required to be in a completed status (i.e., State required fields), but are not required to save the screen.



Required to Save:
color: #FFAA00;
width: 6px;



Required for completion:
colors: #FFAA00 & @white;
width: 6px;

3.5.3 Field Types


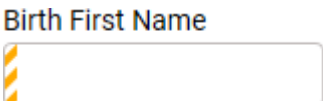

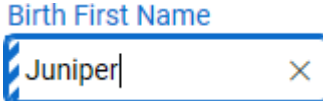

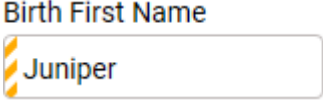

3.5.3.1 Textbox

Functionality: Enter text into the field.

Key Update(s):

- 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)		

3.5.3.2 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

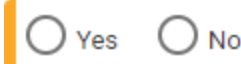
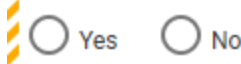
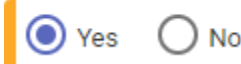
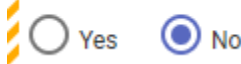
Description	Required to Save	Required for Completion
Drop down		

3.5.3.3 Radio Buttons

Function: Select one option.

Key Change(s):

- 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	Billable 	Consent on File for Future Contact 
Radio Buttons Selected	Billable 	Consent on File for Future Contact 

3.5.3.4 Multi-Select List Box/Transfer Box

Functionality: Select multiple options from one mover box to another.

Key Update(s):

- Requirements are in a bar on the left side of the field
- Updated look of mover buttons

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

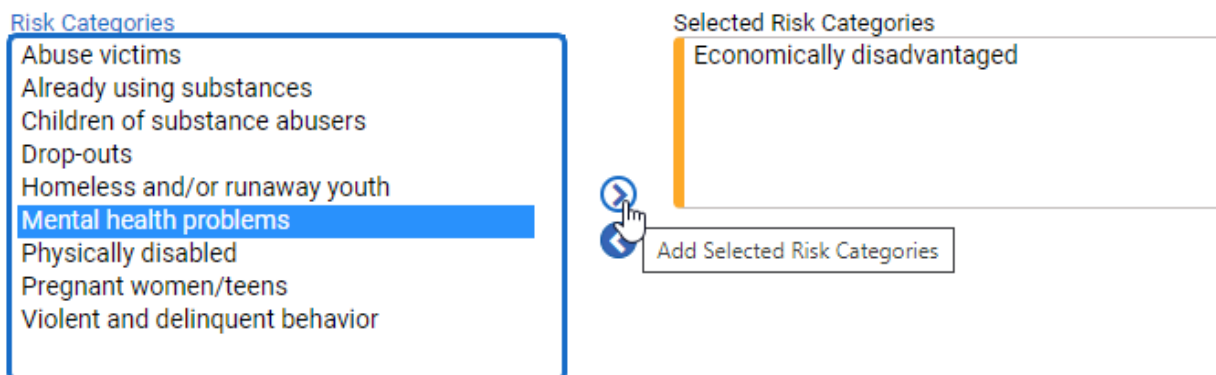


Figure 3-41: Multi Select Box Required to Save Question

Races

- Refused
- Alaska Native
- American Indian
- Asian
- Black or African American
- Multi-racial
- Native Hawaiian or Other Pacific Islander
- Other Race**
- Other Single Race
- Tongan
- Unknown
- White

Selected Races

Add Selected Races

Figure 3-42: Multi Select Box Required for Completion

3.5.3.5 Time Input

Functionality: Enter the time.

Key Change(s):

- Requirements are on the left side of the field

Start Time

End Time

Session Duration

 Min ▼

Documentation Duration

 Min ▼

Travel Duration

 Min ▼

Total Duration

 Min ▼

of Service Units / Sessions

Figure 3-43: Time Input Fields