



Florida WITS

WITS End User Guide

Florida WITS Last Updated July 2020

Florida WITS State Opioid Response (SOR) Grant

Preface

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

ASAM CONTINUUM Triage™ (CO-Triage) is a provisional screening and referral tool for alcohol and substance problems. The CO-Triage questions help clinicians identify broad categories of treatment need along the six ASAM Criteria Dimensions. ASAM CO-Triage provisionally recommends an ASAM Level of Care (ASAM Levels 1, 2, 3, 4 and Opioid Treatment Services) to which a patient should proceed to receive an ASAM CONTINUUM[™] Comprehensive Assessment.

ASAM CONTINUUM[™] is a computerized clinical decision support system (CDSS). ASAM CONTINUUM provides the entire treatment team with a computer-guided, standardized interview for assessing patients with substance use disorders and co-occurring conditions. ASAM CONTINUUM aids clinicians in conducting a full biopsychosocial assessment that addresses all six dimensions of The ASAM Criteria. The decision engine uses research-quality questions (including tools such as the ASI (Addiction Severity Index), CIWA (Clinical Institute Withdrawal Assessment) and CINA (Clinical Institute Narcotic Assessment) instruments to generate a comprehensive patient report which includes a final recommended level of care determination.

Intended Audience

This user guide has been prepared for Florida provider agency staff delivering SOR services to individuals. Information included will assist providers in understanding modifications added to Florida's WITS SOR system regarding Supplemental Questions asked on each GPRA interview and two (2) new post discharge interviews.²

System Requirements

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

Internet Browsers

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

- Apple ® Safari ®
- Google Chrome™
- Mozilla® Firefox®
- Windows Internet Explorer 10 or newer

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

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

² Reference: Enhancement 59306: GPRA: Add Additional Supplemental Questions and Post-Discharge Interviews for SOR

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://fl-training.witsweb.org
Production Site:	https://fl.witsweb.org

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*.

Note: Notes contain information for users to take note of, as the information may affect what the user does with the system.

1 Tip: Tips contain information helpful to the user, such as providing an easier way to do something.

Important: Typically, these highlight details for the user to consider or review before continuing with a step or action within the system. This information may warn the user about possible error messages that may occur if the instructions are not followed, or it may indicate/remind users of additional actions to take before proceeding, such as downloading required software.

Contents

Intended Audience	i
System Requirements	i
Internet Browsers	i
Pop-up Blocker	ii
Customer URL Links	ii
Part 1: Customer Specific Information	1
Workflow Diagram	
Grant Episode Concepts	
Intake Close Processor	
Supplemental Questions and Post-Discharge Interviews	
Part 2: Client Setup	5
Search for a Client	5
Client Search Tips	
Create Client Profile	7
Alternate Names	
Additional Information	
Contact Info	
Collateral Contacts	
Other Numbers	15
History	
Linked Consents	
Link to Consented Client	
Part 3: Client Intake and Program Enrollment	21
Client Activity List	21
Start New Episode (New Clients)	23
Intake	24
Re-Open Intake	
Program Enroll	27
Part 4: GPRA Interviews	29
Completing Interviews	
Action Buttons	
Automation (Skip Logic)	
Answers Reviewed	
GPRA Intake Interview	
GPRA Interview Compliance Details	
Grant Requirement	
GPRA Follow-up Due Summary Screen	
GPRA Follow-up Due Detail Screen	
GPRA Follow-up Interview	41
GPRA Discharge Due Screen	

GPRA Discharge Interview	47
Part 5: Supplemental Questions	
Part 6: Post-Discharge Interviews	55
3-Month Post-Discharge Interview	
Interview Was Not Conducted	
6-Month Post-Discharge Interview	65
Interview Was Not Conducted	
Part 7: Consent and Referrals	67
Create Client Consent Record	67
Print the Client Consent Form	69
Referrals	
Create a Client Referral	
Viewing Referrals	
Referrals In	
Referrals Out	74
Viewing Consented Information Before a Referral is Accepted	75
Viewing Consented Information After a Referral is Accepted	77
Removed Consents	
Part 8: Encounters	80
Create Encounter Notes	80
Part 9: Reports	84
Part 10: ASAM Assessments	86
ASAM CONTINUUM™ Assessment	86
Actual Level of Care Placement in CONTINUUM WITS	94
ASAM CO-Triage [™] Screening and Referral	
Pulling Back the ASAM CO-Triage ™ Report into WITS	
Part 11: Staff Administration	
How to Set Up a New Staff Member Account	
Completion Requirements	
Add Facility Assignment	
Add User Account	
User Roles	
Adding additional items to a profile	
Account Rules/Other Functionality	
Locking Staff Member Access	
Option 1: Staff Member Search Screen	
Option 2: Edit Staff Member Account	
Appendices	
ASAM CONTINUUM [™] Data Entry Conventions	

Part 1: Customer Specific Information

WITS allows providers to easily enter information for individuals and services they receive as part of the SOR program.

- The initial provider agency that works with an individual will create the client profile, intake, and enroll the client into a SOR program.
- If the provider agency needs to refer an individual to another provider for services, WITS has an automated consent/referral process that is HIPAA/42 CFR Part 2 compliant. Once the referred-to service provider accepts the referral, WITS will automatically set up the client profile, intake and SOR program enrollment.
- In the future, once SAMHSA has OMB certification for the GPRA, the initial agency can enter GPRAs or the referred-to agency can enter the GPRAs. WITS will ensure that there are no duplicate GPRAs created for individuals enrolled in the SOR program. Also, if the providers have entered encounters, WITS will map those encounters to the SOR discharge GPRA.

Workflow Diagram

The following diagram illustrates the standard SOR workflow process.

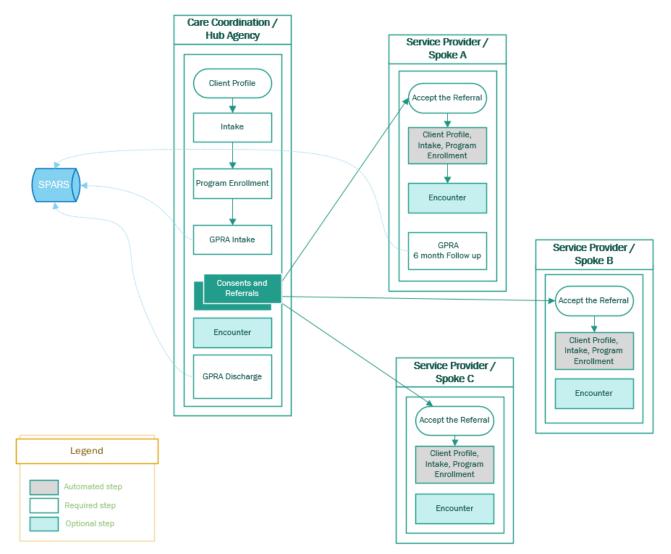


Figure 1-1: Standard SOR Workflow Diagram

Grant Episode Concepts



Background

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

Grant Episode Concepts

Table 1-1: Grant Episode Events and Information

Event	Information
GPRA Menu Item	The ability to enter a GPRA in WITS only becomes available when a WITS client program enrollment (CPE) exists where the associated program has a value in the Grant field and the end user has the GPRA (Full Access) security access role.
Grant Episode	This allows the client to be referred to other agencies and have the same grant episode. If Agency A completes the GPRA Intake and then refers the client to Agency B, Agency B will be able to continue the grant episode and complete the GPRA 6-Month Follow Up and GPRA Discharge interviews for the same client. This will prevent another agency from inadvertently inactivating the previous GPRA Intake because the grant episode will remain assigned to this client in other agencies.
	 The Grant Episode is created and put into a 'Pending' status when the Client Program Enrollment (CPE) is created for a program with a Grant field value.
	2. The Grant Episode follows the client's UCN throughout the process of creating GPRAs.
	3. The 'Pending' grant episode will become 'Active' once the GPRA Intake interview is completed.
	4. It will remain active through the 6-Month Follow-Up, Discharge, 3-Months Post Discharge and 6-Months Post Discharge Interviews.
	5. Once all 5 interviews are completed, the Grant Episode will have a status of 'Closed.'
	6. Once the Grant Episode is 'Closed', a new 'Pending' Grant Episode can then be created if the client needs treatment again.
	7. The WITS Administrator could change Grant Episode from 'Active' to 'Inactive' (this can be done upon creation of a client program enrollment within a different agency).

WITS Administrator Process

Use Case: Client with GPRA intake at one provider goes to another provider without a WITS consent/referral

- 1. If the client goes to another provider who attempts to add a Client Program Enrollment in SOR and that client/UCN already has an 'active' grant episode, the system will prohibit this.
 - The provider/user will be presented with a WITS error message to contact their WITS Administrator.
 - The provider/user should first consult with the client to determine where they had already received SOR services, obtain a signed consent from the client in order to discuss the case with the other agency.

- If consent is given by the client, the provider should coordinate with the other agency, and ask that a Consent and Referral be created in WITS by that agency to send the client's case to the agency where the client is currently present.
- 2. If no other option exists, the provider should contact their ME to help resolve the issue.

Intake Close Processor

For customers only using SOR, the **Intake Close Processor** is a scheduled task that runs every night to automatically close client intakes. Client intakes will be closed when all Client Program Enrollments are for a closed or inactive grant episode and there has been no activity within that client intake (no encounters saved or updated) for a certain number of days. The default number of days is set to 45, but the number can be changed in a site's configuration.

Important: The Intake Close Processor applies to SOR only customers.

Supplemental Questions and Post-Discharge Interviews

Business Need

Florida has a need to ask additional questions pertaining to the SOR grant within the GPRA interviews because the current GPRA questions do not fully assess the client's life situation during GPRA Intake, Discharge and Follow up. These additional questions will be asked at the end of the GPRA interview and displayed in a new section labeled, "Supplemental Questions".

In addition, Florida would like to track a client's progress for a longer-term than what is required by SAMHSA. Therefore, two additional GPRA interviews for SOR grant will be done at 3 months and 6 months post Discharge.

Adding six additional supplemental questions and the 2 additional post discharge interview types will provide a better picture of the client during all GRPA interviews to ensure that the data collected meets the SOR Grant requirements.

Overview of System Changes

- Two (2) Post-Discharge GPRA interviews are now required:
 - 3-month Post Discharge
 - 6-month Post Discharge
- The Supplemental Questions section will be added to the end of the GPRA and will be its own screen for all five
 (5) data collection periods:
 - Intake
 - 6-month Follow up
 - Discharge
 - 3-month Post Discharge
 - 6-month Post Discharge

SPARS and Pre-existing GPRA Interviews

- Supplemental Questions will not be included in the nightly upload to SPARS.
- For all pre-existing GPRA Intake, GPRA Follow-up and GPRA Discharge interviews, the Supplemental Questions screen will be displayed with a default value of "Not Applicable" in all the questions.

The grant episode will not close until all five (5) GPRA types are completed:

Intake

Florida SOR Grant

- Follow Up
- Discharge
- 3-Month Post Discharge
- 6-Month Post Discharge

Part 2: Client Setup

Search for a Client

Where: Client List Screen

Before creating a new client record, search for your client to make sure the client is not already in WITS.

- 1. To view clients within your agency, click on the Client List menu item. A blank Client List screen will appear.
- 2. Use the fields in the Client Search section to narrow your results.
- Tip: When searching for a client, try to use unique information, such as birthdates or social security numbers, if possible. You can also enter a partial name (or other field) followed by a "*". This is called a wild card search. For instance, if you search for Last Name of "Smit*", the search results will display people with the last name of "Smith", "Smitty", "Smithson", etc.
 - 3. After selecting from the search fields, click **Go** to view the results.

Home Page	Client Search			
Agency	Agency	ATR4 Coordinator Agency	Fac	ility
✓ Client List		Arrive Coordinator Agency	_	
► Client Profile	First Name		Last Na	
Linked Consents	SSN		D	OB
 Activity List 	Massachusetts Training Client Id			
Episode List	Unique Client Number		Provider Clien	t ID
 System Administration 	Treatment Staff		 Primary Care S 	staff
My Settings				
Reports	Case Status	Clients with ATR4 Cases	• Intake S	Staff 🔹
Support Ticket	Other Number		Number T	уре
	Include Only Active Consents	Yes 💌		
				Clear Go
	Client List (Export)			Add Client
	Actions Unique Client #	Full Name	DOB	SSN Gender
	P402930ED339433	Abare, Donald	1/7/1966	001-27-0007 Male
	P902188RG881433	Doe, John	6/7/1988	564-78-5555 Male
	Profile Act	ivity List Linked Consents		
	Clients with Consents fi	rom Outside Agencies		
	Actions Agency	Unique Client # C	Client Name	OOB SSN Gender

Figure 2-1: Client List screen, Action links

4. Look for your client in the **Client List**. If you find the right person, view their profile by pointing to the pencil icon in the Actions column and clicking the **Profile** link. If you do not find your client, you can create a new client record.

	nickname or alternate names in the Firs	t Name or Last Name fields.	
lse an asteri	sk (*) to perform a wildcard search.		
xamples:			
	clients whose last name starts with "Jon'	': Jon*	
Client	Search		
	Agency Administrative	Facility	
	First Name SSN	Last Name Jon*	
Searce	h by the last 4 digits of a client's SSN: *	1123	
Client			
Client		From the	
	Agency Administrative	Facility	Y
	SSN *1123	DOB	
liont Bir	thday or Age		
		es with a colon (:). Search for clients born after a c	ortain
		born before a certain date with a less than sign (•	
xamples:			
Find	clients born in the year 1990: 1/1/1990:	12/31/1990	
	Search		
Client	Agency Administrative	Facility	Ŧ
Client	First Name	Last Name	
Client		DOB 1/1/1990:12/31/1	
Client	SSN		
		/1959	
	SSN	/1959	
	SSN	/1959	

Create Client Profile

۱ 🏈	Nhere:	Client List >	Client	Profile
-----	--------	---------------	--------	---------

To add a new client to the system, follow the steps below.

Note: Please search for each client before creating a new record.

- 1. On the left menu, click **Client List**.
- 2. On the Client List screen, click Add Client.

Standard SOR Q	A Provider Agency, Provid	der Facility 🖋		Jones, As	hley; Clinician ▼ 🗧 Logout
					 Snapshot
Home Page	Client Search				
Agency	Agency	Provider Agency	Facility	y	Ψ.
✓ Client List	First Name		Last Name	9	
 Client Profile 	SSN		DOE	3	
Linked Consents	Standard SOR QA Client Id		Provider Client IE)	
Non-Episode Contact	Unique Client Number		Primary Care Staf	ff	
 Activity List 	Treatment Staff		✓ Intake Staf	ff	*
Episode List	Case Status	All Clients	 Number Type 	e	*
 System Administration 	Other Number				
	Include Only Active Consents	Yes 💌			
					Clear Go
	Client List (Export)			_	Add Client
	Actions Unique Client #	Full Name	DOB	<u>SSN</u>	Gender

Figure 2-2: Client Search/List screen; Add Client link

3. On the **Client Profile** screen, enter the required client information. See the table below for information on each field.

Important: When adding new clients to the system, review the Client Profile fields for accuracy before saving the screen. Once the Client Profile screen is saved, a Unique Client Number (UCN) is created based on the data provided. It is important to enter client information correctly to avoid duplicate client entry in the future.

Table 2-1: Client Profile fields

Field	Description		
First Name	Type the client's current first name.		
Middle Name	(Optional)		
Last Name	Type the client's current last name.		
Mother's Maiden Name	(Optional)		

Field	Description
Suffix	(Optional)
Gender	Select the client's gender from the drop-down list.
DOB	Enter the client's date of birth.
SSN	Type the client's Social Security Number.
Driver's License and State	(Optional) Type the number and then select the State
	from the drop-down list.
Has paper file	(Optional) Select Yes or No. Field defaults to Yes.
Provider Client ID	(Optional)

	S Tre	atment Provide	r, New Facility 🌢	•			Joi	nes, Ashley 🖣 Logoi	
							🖹 Generate Rep	port 🖉	Snapshot
Home Page	Profile								
▶ Agency		First Name			Provider Client ID				
Group List	N	/liddle Name			Unique Client Number				
Clinical Dashboard		Last Name			State Client ID				
✓ Client List	Mother's N	faiden Name			Record Created By				
✓ Client Profile		Suffix			Last Updated By				
Alternate Names		Gender		v	Created Date				
Additional Information		DOB		#	Last Updated Date				
Contact Info		SSN							
Collateral Contacts	Drive	er's License		¥					
Other Numbers									
History									
Client Group Enrollment		5 1 1 4-	-						
Authorization	Ha	as paper file Ye	S V						
Employment									
Allergies Linked Consents	Admin	istrative Actions							
Non-Episode Contact									
 Activity List 					Cancel	Save Finist	n 🕟		
Episode List									
 System Administration 		nate Names							<u>Add</u>
Reports	Actions	Last Name	<u>Firs</u>	<u>st Name</u>	Middle Name	<u>CI</u>	ient Alias Type		*
Support Ticket									•
	Addre	esses							Add
	Actions	Address Type		Address	Confidential	Crea	ated Up	dated	^

Figure 2-3: Client Profile screen

- 4. Click Save.
- 5. Click the **right-arrow** to move to the **Alternate Names** screen.

Alternate Names

The client's nickname or street name may be entered on this screen

Tip: Alternative names can also be used to search for the client's profile in the future. On the Client Search screen, type the client's alternative name in the First Name and/or Last Name fields.

6. On the Alternate Names screen, click Add Alternate Name, and the bottom half of the screen becomes editable.

Alterna	ate Names			
Actions	Last Name	First Name	Middle Name	Client Alias Type
				Add Alternate Name
	First Name	Middle Name		C)
	Last Name	Client Alias Type		
		Cancel Save	Finish	

7. Complete at least the First Name field.

Alternate Names			
Actions Last Name	First Name	Middle Name	Client Alias Type
			Add Alternate Name
First Name <mark>Johnny</mark>	Middle Name		
Last Name	Client Alias Type	Ψ.	
		Cancel Finish	

- 8. Click **Finish**. The name will now appear in the list at the top of the screen.
- 9. From the Alternate Names screen, click the right-arrow button to open the Additional Information screen.

Additional Information

10. On the Additional Information screen, complete the light-yellow fields.

Table 2-2: Additional Information screen

Field	Description
Ethnicity	Select from the drop-down list.
Selected Races	Select one or more races.
Veteran Status	Select from the drop-down list.

Additional Information	
Ethnicity	
Races Alaska Native	Selected Races
American Indian	
Black or African American	
Native Hawaiian or Other Pacific Islander	٣
Special Needs	Selected Special Needs
None No Response	*
Developmentally Disabled Major Difficulty in Ambulating or Nonambulation	-
General Client Comments	
Sexual Orientation	
Religious Preference	
English Fluency	
Preferred v	Veteran Status
Interpreter Needed	Citizenship
	Cancel Save Finish (

Figure 2-4: Standard SOR screen

Additional Inform	ation								
Ethnicity Not Hispania	a or Latino	T							
	c or Launo	V							
Races Alaska Native			Selected Races Asian						
American Indian		î >	Other Race		Ê				
Black or African Ame									
Native Hawaiian or 0 Unknown	Other Pacific Islander	, <			-				
Special Needs No Response			Selected Special Need None	s					
Developmentally Dis	abled		None						
Major Difficulty in An	nbulating or Nonambulation								
Moderate To Severe	Medical Problems	▼ <			*				
General Client									
Comments									
		,							
Sexual Orientation	Not Collected	*							
Religious Preference	Cao Dai	*							
English Fluency	Moderate	v							
Preferred Language	Mandarin	v	Veteran Status	Not Collected	v				
Interpreter Needed	NO	*	Citizenship		Ŧ				
					Cancel	Save	Finish	"	•

11. When complete, click **Save**, then click the **right-arrow** button to open the **Contact Info** screen.

Contact Info

Tip: Enter the client's contact information on this screen to help locate the client for follow-ups.

- 12. On the **Contact Info** screen, a phone number can be entered for the client.
- 13. To enter an address, click Add Address. This will open the Address Information screen.

Contact Info				
Home Phone #	Preferre	ed Method of Contact	v	
Work Phone #				
Mobile #				
Other Phone #				
Fax #				
Email Address				
Addresses				Add Address
Actions Address Type	Address	Confidential	Created	<u>Updated</u>
			Cancel Save	Finish ()

Figure 2-5: Contact Info screen

14. Enter the client's Address Type, Address line 1, City, State, and Zip Code.

Address Information			
Address Type		Ŧ	Confidential No 💌
Address Line 1			
Address Line 2			
County	v		
City			State 💌 Zip
			Cancel Finish



- 15. When complete, click **Finish**, and the client's address information will show up on the Contact Info screen. You may enter several addresses for a client. If a client has a new address, update the Address Type of the current address record to "Previous", then create a new address.
- 16. From the **Contact Info** screen, click the **right-arrow** button to open the **Collateral Contacts** screen.

Collateral Contacts

Tip: Enter any collateral contacts for the client on this screen to help locate the client for follow-ups.

17. On the Collateral Contacts screen, click the Add Contact link.

Collateral Contac	cts						
Actions First Nat	me Last Name	Ē	Relation	Phone Numbers		Can Contact?	
					_	<u>Ac</u>	ld Contact
First Name							
Last Name			Addr	ress 1			
Relation			Addr	ress 2			
Custodian				City	State	Zip	
Gender				Email			
Date of Birth		SSN	Can C				
Home Phone			Conse	ent On File			
Work Phone				Notes			
Mobile							
Fax							
Other							11
Legal Guardian			Ci	reated			
Active Date			Last U	Jpdate			
Inactive Date							
				Са	ncel Sav	ve Finish	

Figure 2-7: Collateral Contacts screen, click Add Contact

18. Enter the required client information. See the table below for information on the required fields.

Table 2-3: Collateral Contacts required fields

Field	Description
First Name	Type the contact's first name.
Last Name	Type the contact's last name.
Relation	Select the collateral contact's relation to the client from the drop-down menu.
Address, City, State	Type the contact's address information
Can Contact	Select Yes or No.
Consent On File	Select Yes or No.

Collate	eral Contacts							
Actions	First Name		Last Name	Relation	Phone Numbers		Can Contact?	
								Add Contact
	First Name							
				Address 1				
	Last Name			Address 2				
	Relation		Ŧ	City		State v	Zip	
	Gender		*	Emai				
	Home Phone			Can Contac	v			
	Work Phone			Consent On File	No 🔻			
	Mobile			Notes	•			
	Fax							
	Other							
	Legal Guardian	v					1.	
	Active Date	7/31/2017	Ê	Created				
	Inactive Date		#	Last Update	•			
							Can	cel Finish

Figure 2-8: Add Collateral Contacts screen

- 19. When complete, click **Finish**. The collateral contact name(s) will be displayed in the list section of the screen.
- 20. From the **Collateral Contacts** screen, click the **right-arrow** button to open the **Other Numbers** screen.

Other Numbers

In this section, users can add additional identifying numbers for a client, such as a court case number.

- 21. On the **Other Numbers** screen, click the **Add Other Number** link. The bottom half of the screen now becomes editable.
- 22. Fill in information such as, Number Type, Number, Relation, and Address of the contact.

Other	Numbers					
Actions	Number Type	<u>#</u>	<u>Start</u>	End	Contact Name	Status
						Add Other Number
Numbe	er Type		Ŧ			
N	lumber					
Sta	art Date 11/26/2014 🛗					
Er	nd Date					
	Status Active 🔻					
0	Contact		T			
Con	nments					
					1	
						Cancel Finish

Figure 2-9: Other Numbers screen

23. The **Contact** dropdown box will display the names of any saved Collateral Contacts from the previous screen. If the name of the Collateral Contact is not present, click on the **Collateral Contacts** screen to add a new record.

				Add Other Nun
Number Type		v		
Number				
Start Date	12/11/2014 🛗			
End Date	#			
Status	Active 💌			
Contact		▲		
Comments	I	۹.		
	Smith, Jane		1.	
				Cancel Fini

Figure 2-10: Other Numbers screen, saved collateral contact

- 24. When complete, click Finish. The names now show up in the table on top of the screen.
- 25. Click Finish again, and you are redirected to the Client Search screen.

History

The **History** sub-menu displays a list of all changes that have been made to the client information as well as any access to this client's record. It lists the date, the staff person, and a description of the access or change.

& Mouse, Minnie M2000703	0036580 0			Snapsho
Home Page	Client History (Ex	port)		
Agency	Date Changed	System Account	Description of Changes	
Clinical Dashboard	10/12/2017 12:19 PM	Jones, Ashley	Accessed Client Profile Screen	
	10/12/2017 12:19 PM	Jones, Ashley	Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"	
 Client List 	7/7/2017 9:38 AM	Saul, Michele	Discharge was added.	
	7/7/2017 9:38 AM	Saul, Michele	Accessed Discharge Screen for Case: 1	
Alternate Names	7/7/2017 9:37 AM	Saul, Michele	Client Program Enrollment was changed.	
Additional Information	7/7/2017 8:33 AM	Saul, Michele	Accessed Admission Screen for Case: 1	
Contact Info	7/7/2017 8:33 AM	Saul, Michele	Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"	
Collateral Contacts	7/6/2017 3:01 PM	dataentry, michele	Accessed Client Profile Screen	
Other Numbers	7/6/2017 2:43 PM	dataentry, michele	Client Program Enrollment was added.	
History	7/6/2017 2:42 PM	dataentry, michele	Outcome Measure was changed.	
· · · · · · · · · · · · · · · · · · ·	7/6/2017 2:39 PM	dataentry, michele	Client Diagnosis was changed.	
Linked Consents	7/6/2017 2:38 PM	dataentry, michele	Accessed Outcome Measures - Client Diagnosis for Case: 1	
Non-Episode Contact	7/6/2017 2:38 PM	dataentry, michele	Outcome Measure was added.	
 Activity List 	7/6/2017 2:38 PM	dataentry, michele	Outcome Measure was added.	
Episode List	7/6/2017 2:37 PM	dataentry, michele	Accessed Outcome Measures - Client Status for Case: 1	
System Administration	7/6/2017 2:37 PM	dataentry, michele	Accessed Outcome Measures for Case: 1	
	7/6/2017 2:37 PM	dataentry, michele	Admission was added.	
	7/6/2017 2:36 PM	dataentry, michele	Accessed Admission Screen for Case: 1	
	7/6/2017 2:36 PM	dataentry, michele	Client Intake Record was created.	
	7/6/2017 2:36 PM	dataentry, michele	Accessed Intake Screen	
	7/6/2017 2:36 PM	dataentry, michele	Address 'PO BOX 678' added.	
	7/6/2017 2:35 PM	dataentry, michele	Veteran Status changed from " to 'No'. Ethnicity changed from " to 'Not of Hispanic Origin'. Race Black or African Americani added.	
	7/6/2017 2:35 PM	dataentry, michele	Accessed Client Record: "Mouse, Minnie, Client ID: M20007030036580"	
	7/6/2017 2:35 PM	dataentry, michele	Client 'Mouse, Minnie' added.	

Figure 2-11: Client History screen

Linked Consents

Where: Client List > Clients with Consents from Outside Agencies

Each time another agency consents client information to your agency, a row will be displayed on the "**Clients with Consents from Outside Agencies**" section of the **Client List** screen. Always look at the linked consents first to make sure you don't already have that client entered.

If the consent is sent along with a referral and the referral is accepted at the referred to agency, users with a Clinical Supervisor role may manually link and unlink consents. This action is available when it is clear that a client with consented information is in fact the same person as a client that exists in the agency. They may not have been automatically linked because the names or other identifying information may have been different in the sending agency than they are in the receiving agency.

Home Page	Client	Search							
Agency		Agency	Administrative Age	ncy	Facility	,	Ŧ		
Clinical Dashboard		First Name			Last Name				
Client List		SSN			DOE				
Client Profile	PA-WIT	TS Training Client Id							
Linked Consents	Ur	nique Client Number			Provider Client ID				
Non-Episode Contact		Treatment Staff			* Primary Care Staf	F			
 Activity List 		Case Status	All Clients		 Intake Staf 	f	T		
Episode List		Other Number			Number Type		v		
System Administration	Include O	nly Active Consents	Yes v						
						CI	ear Go		
		Unique Client #		Full Name		DOB	<u>SSN</u>	Gend	_
		200006018756780		2, Deeksha Tes	st	6/1/1987	213-12-5678	Fema	_
		A23608019956780		Asteraceae, Zir	nnia	8/1/1999	012-34-5678	Fema	lle
	ø	B00009078465980		Bee, New		9/7/1984	852-31-6598	Male	
	(a)	B60007108274830		Berry, Blue		7/10/1982	090-44-7483	Male	
	(M ¹	B60007107298760		Berry, Straw		7/10/1972	173-84-9876	Male	
	ø	B00007020355550		Boy, Teen		7/2/1972	123-12-5555	Male	
_	Clier	nts with Consents	s from Outside A	gencies					
	Actions	Agency			Unique Client #	Client Name	DOB	SSN	Gender

For example:

A client named "Bobby" is referred into your agency from an outside agency. Your agency already has a record for a client named "Robert". The Linked Consents screen allows you to compare the New/Referred Client Information (Bobby) with the Existing Client Information (Robert). Using this screen, you can tell that Robert and Bobby are the same person and these two profiles can be linked together so the same client won't have two different client profiles within the same agency.

Link to Consented Client

- 1. On the left menu, click **Client List** and then click **Go**.
- 2. In the Clients with Consents from Outside Agencies section, hover over the Actions column and click Link.

Home Page	Client Search			
Agency	Agency Administrative Age	ncy Facility	v	
Clinical Dashboard	First Name	Last Name		1
	SSN	DOB		
► Client Profile	PA-WITS Training Client Id			
Linked Consents	Unique Client Number	Provider Client ID		
Non-Episode Contact	Treatment Staff	 Primary Care Staff 		
 Activity List 	Case Status All Clients	 Intake Staff 	v	
Episode List	Other Number	Number Type	v	
System Administration	Include Only Active Consents Yes v			
			Clear Go	
	Client List (Export)			Add Client
	Actions Unique Client #	Full Name	DOB SSN	Gender
	200006018756780	2, Deeksha Test	6/1/1987 213-12-5678	Female
	A23608019956780	Asteraceae, Zinnia	8/1/1999 012-34-5678	Female
	B00009078465980	Bee, New	9/7/1984 852-31-6598	Male
	B60007108274830	Berry, Blue	7/10/1982 090-44-7483	Male
	B60007107298760	Berry, Straw	7/10/1972 173-84-9876	Male
	B00007020355550	Boy, Teen	7/2/1972 123-12-5555	Male
	Clients with Consents from Outside A	gencies		
	Actions Agency	Unique Client #	Client Name DOB	<u>SSN</u> <u>Gender</u>
	GREENBRIAR TREATMENT CENTER	F62308138722220	Forrest, Bobby 8/13/1987	121-11-2222 Male

Figure 2-12: Client List screen, Clients with Consents from Outside Agencies section, Link action item

3. The Link Client Search screen will appear and the Consented Client information is displayed as read-only fields.

					Snapshot
Home Page	Link to Consented Client				
Agency	Full Name Forrest, Bobby	DOB 8/13/1987			
Clinical Dashboard	Client Number F62308138722220	SSN 121-11-2222			
✓ Client List	Link Client Search				
Client Profile	Agency Admi	nistrative Agency	Facility		v
Linked Consents	First Name		Last Name		
Non-Episode Contact	SSN		DOB		
 Activity List 	Unique Client Number		Provider Client ID		
Episode List	Other Number		Number Type		Ψ.
 System Administration 			L.		Clear Cancel Go
	Actions Unique Client #	Full Na	me DOB	SSN	Gender

Figure 2-13: Link Client Search screen

4. Use the search fields to find a client with similar information. It is helpful to copy and paste some of the consented client's information into the search fields. The example in Figure 2-14 uses the Consented Client's Unique Client Number in the search field.

					Snapshot
Home Page	Link to Consented Client				
Agency Clinical Dashboard		DOB 8/13/1987 SSN 121-11-2222			
 Client List 	Link Client Search				
 Client Profile Linked Consents Non-Episode Contact 	Agency Administrative First Name SSN	Agency	Facility Last Name DOB		¥
Activity List Episode List	Unique Client Number F62308138722 Other Number	220	Provider Client ID Number Type		Y
 System Administration 					Clear Cancel Go
	Actions Unique Client #	Full Na	me DOB	SSN	Gender

Figure 2-14: Link Client Search screen, search by Unique Client Number

5. After filling out one or more search fields, click **Go** and then review the search results.

					Snapshot
Home Page	Link to Consented Client				
Agency Clinical Dashboard	Full Name Forrest, Bobby Client Number F62308138722220	DOB 8/13/1987 SSN 121-11-2222			
✓ Client List	Link Client Search				
Client Profile Linked Consents Non-Episode Contact Activity List Episode List System Administration	Agency Administrativ First Name SSN Unique Client Number F623081387. Other Number		Facility Last Name DOB Provider Client ID Number Type	Clear	▼ ▼ Cancel Go
	Actions Unique Client # Image: Client # F62308138722220	Full Name Forrest, Robert	DOB 8/13/1987	SSN 121-11-2222	Gender Male

Figure 2-15: Link Client Search screen with search results

6. If the information in the search results matches the Consented Client information, hover over the Actions column and then click **Link**.

					 Snapshot
Home Page	Link to Consented Client				
Agency	Full Name Forrest, Bobby D	OB 8/13/1987			
Clinical Dashboard	Client Number F62308138722220 S	SN 121-11-2222			
✓ Client List	Link Client Search				
► Client Profile	Agency Administrative A	gency	Facility		w.
Linked Consents	First Name		Last Name		
Non-Episode Contact	SSN		DOB		
 Activity List 	Unique Client Number F623081387222	20	Provider Client ID		
Episode List	Other Number		Number Type		*
 System Administration 				Clea	ar Cancel Go
	Actions Unique Client #	Full Name	DOB	SSN	Gender
	F62308138722220	Forrest, Robert	8/13/1987	121-11-2222	Male

Figure 2-16: Link Client Search screen, Link Consent record

7. Click Yes.

		Snapshot
Home Page		
▶ Agency	Are you sure you want to link current consented client Forrest, Bobby's consent to client Forrest, Robert?	
Clinical Dashboard	Yes No	
 Client Profile 		
Linked Consents		
Non-Episode Contact		
Activity List		
Episode List		
 System Administration 		

Figure 2-17: Are you sure you want to link current consented client to the consent client

8. The client's Linked Consent screen will now display the consent record from the other agency.

Section 2018 Forrest, Robert F6230813	8722220	3						Snapsho
Home Page	Linked	Client Consents in Other Agencies						
Agency	Consentin	a Agency	v					
Clinical Dashboard							Clear	Cancel
							Cidai	Guildon
Client Profile	Linke	d Consent List						Add Link
Linked Consents	Actions	Agency	Client Name	Unique Client #	DOB	<u>SSN</u>	Min Act. Date	Max Act. Date
Non-Episode Contact	ø	GREENBRIAR TREATMENT CENTER	Forrest, Bobby	F62308138722220	8/13/1987	121-11-2222	7/3/2017	7/3/2017
 Activity List 								
Episode List								
System Administration								

Figure 2-18: Linked Consents screen

Part 3: Client Intake and Program Enrollment

Client Activity List

It is important to understand that data collection in WITS happens within a Client's Activity List. The Case, or Episode of Care, is the container that holds all client activities. The beginning and end of a client's Episode of Care are recorded on the Intake transaction, where the Intake Date starts the Episode and the Intake Date Closed marks the end of the Episode (these fields are shown in *Figure 3-6: Intake Case Information screen* on page 25).

The concept diagram below illustrates how this data collection is structured within the client Activity List. This Activity List is comprised of two (2) primary nested containers: Episode (e.g., Case, or Intake), and Program. The double lines connecting the Program container represent multiple program enrollments, which are allowed within a single Episode. In the diagram, arrows denote the sequence of progressing through each container.

When an Episode of Care ends for a client, this signifies that the client is no longer receiving services. It's possible for that client to return at a future date.

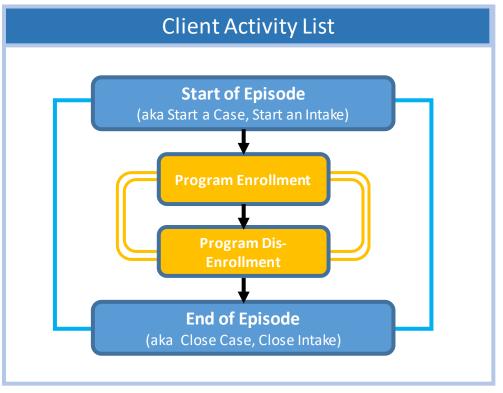
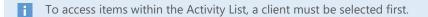


Figure 3-1: Concept Diagram of Data Collection Structure within Client Activity List

The **Client Activity List** can serve as a "dashboard' view for information that has been collected for a given client within an Episode. Each Activity on the Activity List has a status to help the end user determine if that activity is "Complete" or "In Progress". When an activity is "In Progress", a **Details** link is available which displays the information needed to complete the activity.

Certain client activities must be complete before you can proceed to a following activity. Validation rules will guide you throughout the workflow as you enter new data.



Agency	Actions	Activity			
		MOUVILY	Activity Date	Created Date	Status
Clinical Dashboard	ø	Client Information (Profile)	6/23/2017	6/30/2017	Completed
Client List	ø	Intake Transaction	6/23/2017	6/30/2017	Completed
Client Profile	ø	Screening Tool	6/23/2017	6/30/2017	Completed
Linked Consents	A	Admission	6/30/2017	6/30/2017	Completed
Non-Episode Contact Activity List	ø	Outcome Measures - Client Status (Initial)	6/30/2017		In Progress (Details)

Figure 3-2: Client Activity List, Details link

🦁 Pennsylvania-WITS UAT - Google Chrome 📃 📼 💌
Secure https://pa-uat.witsweb.org/?stateMachineState
& Rose, Daisy R20006309000120 1
Outcome Measures - Client Status Progress
Primary Detailed Drug Code is missing.Client Diagnosis is missing.

Figure 3-3: Details link, list of missing information

Some Client Activities do not have a concept of being complete. For those activities, the Status will be listed as Not Applicable.

Start New Episode (New Clients)



Where: Client List > Activity List > Episode List

In WITS, all items located in a client's Activity List are based upon an active Episode of Care. In the screen capture below, note the Activity List in the left menu only displays one item, "Episode List". An episode must be created before accessing other items in the client's Activity List.

To start a new episode of care for a client, follow the steps below.

- 1. On the left menu, click **Episode List**.
- 2. Click the Start New Episode link.

Fox, Juniper F20010120092650	0 0								 Snapshot
Home Page	0	Please se	elect a case	, or click Sta	art New Episod	le.			×
Agency	Enic	ode List						Cta	rt Now Episodo
Clinical Dashboard								<u> 318</u>	<u>rt New Episode</u>
✓ Client List	Actions	Case #	Status	Facility	Intake By	Intake Date	Closed Date	Latest PE	<u>Domains</u>
 Client Profile 									
Linked Consents									
Non-Episode Contact									
Activity List									
Episode List									
 System Administration 									

Figure 3-4: Episode List screen, Start New Episode link

If the client profile is missing certain information, such as an Address or fields on the Additional Information screen, a New Episode cannot be created and an error message will appear, as shown in Figure 3-5.

Ex. Juniper F20010120092650	0								 Snapshot
Home Page	O 0	annot b	egin an ep	isode of ca	re for the curi	rent client until 1	the Client Profile	is completed.	×
▶ Agency									
Clinical Dashboard	Episo	ode List						<u>Star</u>	t New Episode
✓ Client List	Actions	Case #	<u>Status</u>	<u>Facility</u>	Intake By	Intake Date	Closed Date	Latest PE	Domains
Client Profile									
Linked Consents									
Non-Episode Contact									
 Activity List 									
Episode List									
 System Administration 									

Figure 3-5: Episode List screen, Error Message

If the client profile is complete, clicking **Start New Episode** will open the **Intake Case Information** screen, as shown in Figure 3-6: Intake Case Information screen.

(Continue to next section)

Intake

Ô

Where:	Client List > Activity List	> Intake
--------	-----------------------------	----------

Once an episode of care has been created (see above section) the system will display the Intake Case Information screen.

Fox, Juniper J034444SJ4446	4 1 •	
Home Page	Intake Case Information	
► Agency	Intake Facility Banyan Health Systems	Case # 1
✓ Client List	Intake Staff Jones, Ashley	Case Status Open Active
Client Profile	Initial Contact	Initial Contact Date
Linked Consents	Residence	Intake Date 6/29/2020 🛗
→ Activity List	Source of Referral	Pregnant v Due Date
Intake	Referral Contact	HIV Positive
CONTINUUM Triage™	Add Collateral Contact	Injection Drug User
► ASAM	Is this intake funded	Problem Area
Program Enroll	by DCF?	Presenting Problem
Encounters	(In Client's Own Words)
Consent Referrals		
Episode List		
System Administration		l
Reports		
	Date Classed	
	Date Closed Cancel Sa	ave Finish

1. On the Intake Case Information screen, complete the fields as shown in the table below.

Table 3-1: Intake Case Information Fields

Field	Description
Intake Facility	Pre-populates with the current facility location.
Intake Staff	Pre-populates with the current staff member name.
Initial Contact	Select from the drop-down list.
Case Status	Defaults to "Open Active".
Initial Contact Date	The date when the Client first reached out for treatment.
Intake Date	Enter the client's intake date, (which also marks the beginning of the client's Episode).
Residence	Select from the drop-down list.
Source of Referral	Select from the drop-down list.
Referral Contact	(Optional) Select from a list of the client's collateral contacts.
Pregnant	Is the client pregnant at the time of admission? Complete if applicable.
HIV Positive	(Optional)
Injection Drug User	Select Yes or No.
Problem Area	(Optional)
Presenting Problem (In Client's Own Words)	(Optional)

Field	Description
Is this intake funded by DCF?	Select Yes or No. If 'Yes' is selected, the multiselect field, "Available Managing Entities" becomes available. Is this intake funded by DCF?
Available Managing Entities	If this intake is funded by DCF ('Yes' was selected on the field, "Is this intake funded by DCF?"), this mover box will appear. Choose from the list of Available Managing Entities and move the ME to the Administraive Managing Entities box using the mover buttons. Note: This list is filtered based on the ME-Provider relationships that have been set up on the Agency Profile. Available Managing Entities Nickel Agency Yangfan ME Agency
Date Closed	The Date Closed field is used to mark the end of the client's Episode. Date Closed Save & Close the Case

i Note to Florida on ME/Provider Changes: In the case where an ME is already selected as the Administrative ME of a Provider's Intake, and the ME no longer administers the Provider (the Provider has been de-selected from the ME's Direct Service Provider list on Agency Profile), the ME will remain as the Intake's Administrative ME, unless a user de-selects this ME from the Intake profile.

Intake Case Inform	nation					
Intake Facility	Banyan Health Systems	v	Case #	1		
	Jones, Ashley	~	Case Status	Open Active		
Initial Contact		Ŧ	Initial Contact Date			
Residence		*	Intake Date			
Source of Referral		Ŧ	Pregnant		Due Date	
Referral Contact		_	HIV Positive	v		
Referrar Contact	Add Collateral Contact	*	Injection Drug User	v		
Is this intake funded	Yes		Problem Area			v
by DCF?			Presenting Problem			
			(In Client's Own Words)			
						1
Available Managing I	Entitios	Admi	nistrative Managing Entities			
Nickel Agency	*		vard Behavioral Health Coalition (BBHC)	*		
Yangfan ME Agency	× •					
	, (
	▼			*		
Date Closed	Save & Close the Case					
			Cancel Save Finish			

Figure 3-6: Intake Case Information screen

3. Click Finish.

Re-Open Intake

Where: Client List > Activity List > Intake

Once an episode of care has been closed (after the client completes the SOR grant or is administratively discharged), if needed for a client, the episode can be re-opened. Users must have the "Case ReOpen" role on their staff account in order to re-open the episode/intake.

- 1. Using the Client List, find the client which needs to have the episode re-opened and access their Client Profile.
- 2. On the navigation menu, click on **Episode List**.
- 3. To view the closed Episode, click on **Review**.

Florida WITS Tra	ining	Provid	ler 1, Facili	ty 1 🖋				
America, Captain Q913169QE	751544	1 🕴						
Home Page	Epis	ode List						
▶ Agency	Actions	Case #	Status	Facility	Intake By	Intake Date	Closed Date	Latest PE
✓ Client List	ø	1	Closed	Facility 1	Schnoor, Kory	12/2/2019	12/11/2019	Facility 1/State Opioi
 Client Profile Linked Consents Activity List Episode List 								
System Administration Reports								

4. On the Intake Case Information screen, click **Re-Open Case**. If you do not see "Re-Open Case" then you do not have the Case ReOpen role.

Florida WITS Tra	ining Provider 1, Facility 1 🖍
🛔 America, Captain Q913169QE	751544 1 🖸 🗎 SSR
Home Page	Intake Case Information
► Agency	Intake Facility 1 Case # 1
✓ Client List	Facility Facility Case Status Intake Schnoor, Kory Staff
Client Profile	Stall Initial Initial Contact Date
Linked Consents	Contact Intake Date 12/2/2019
✓ Activity List	Source of Southeast Florida Behavioral Health Network Pregnant Not Applicable Due Date
Intake	Referral Southeast Horiza behavioral realitive Work HIV Positive No
CONTINUUM Triage™	Referral Contact Injection Drug User No
► ASAM	Problem Area Both Alcohol & Drugs
Program Enroll	Presenting Problem
GPRA	(In Client's Own Words)
Encounters	
Consent	
Referrals	
Episode List	
 System Administration 	
Reports	
	Date Closed 12/11/2019 Re-Open Case

Program Enroll



Once an Intake has been created (see above section), complete the client's program enrollment.

- 1. On the left menu, click **Program Enroll**.
- 2. Click the **Add Enrollment** link.

Standard SOR Q	A Provider Agency, Provider Facility	/	Jones, Ashley; Clinician ↓ Logout
🛔 Fox, Juniper J584688SJ88466	54 1 🛛		 Snapshot
Home Page	Program Enrollment		
Agency	Program Name	Facility	v
✓ Client List	Modality	¥	
 Client Profile 			From: To:
Linked Consents		Active Program Enrollments During Date Range	1/24/2018 1/24/2019
Non-Episode Contact			Clear Go
Intake	Program Enrollment List		Add Enrollment
Program Enroll	Actions Program Name	Start Date End Date	Facility Notes
Encounters			
Notes			
Consent			
Referrals			
Episode List			Finish
 System Administration 			

Figure 3-7: Program Enrollment screen

3. Complete fields on the Program Enrollment Profile.

Table 3-2: Program Enrollment Profile fields

Field	Description
Facility	Defaults to the current Facility name.
Program Name	Select the appropriate program for the client
Program Staff	Pre-populates with the current staff member name.
Start Date	Defaults to the current date.
Days on Wait List (TEDS Only)	Type the number of days.
Reason for waiting? (TEDS Only)	If the client had to wait longer than two weeks to access the recommended level of care, select the reason from the drop-down list.
	This field will be required if:The program enrollment start date is more than 14 days from
	the most recent ASAM or Placement Summary date.
	• The LOC associated with the program is different than the Recommended LOC of the most recent ASAM or Placement Summary (consented or client activity).
Notes	Type any notes as needed.

Standard SOR Q	A Provider Agency, Provider Facility Jones,	, Ashley; Clinician ╺ 🗧 Logout
Fox, Juniper J584688SJ88466	34 1 O	 Snapshot
Home Page	Program Enrollment Profile	
▶ Agency	Facility Provider Facility Toomain Substance Abuse Days on Wait List	Start Date 1/24/2019 🛗
✓ Client List		End Date
 Client Profile 	Program Staff Jones, Ashley; Clinician 🛛 👻	
Linked Consents	Termination Reason	
Non-Episode Contact	Notes	
 ✓ Activity List Intake 		
Program Enroll	i.	
► Encounters		
▶ Notes	Cancel	Save Finish
Consent		
Referrals		
Episode List		
 System Administration 		

Figure 3-8: Program Enrollment Profile screen

- 4. Click **Finish**.
- 5. On the Program Enrollment screen, click **Finish**.

Part 4: GPRA Interviews

Where:	Client List	> Activity	List > GPRA
--------	-------------	------------	-------------

To access the GPRA section in WITS, select a client from the Client List and then view the client's Activity List. The GPRA section displays a list of previously entered GPRA interviews (at that agency) and includes link(s) to add a new interview record. For previously entered GPRA interviews, available actions include, View, Edit, and Delete, which are described below in *Table 4-1: Available Actions for GPRA Interviews*.

Important: The GPRA menu item will only appear if:

- 1. The staff member completing the GPRA interview has been assigned the following role, "GPRA (Full Access)". This role is assigned by your WITS or agency administrator.
- 2. The GPRA interview is being done for a client who is enrolled in a WITS program associated with the SOR grant. Your WITS administrator should advise you as to which of your agencies' programs are associated with the SOR grant.

Agency Action Interview Type Client type Interview Date Record Status Client List Client Profile Linked Consents Non-Episode Contact Activity List Intake Program Enroll Encounters Notes Consent GPRA Referrals Action Interview Type Client type Interview Date Record Status	Standard SOR G	QA P	rovider Agency, Provider Fa	cility 🖋		Jones, Ashley; Clinician ▼ Logout
 Agency Client List Client Profile Linked Consents Non-Episode Contact Activity List Intake Program Enroll Encounters Notes Consent GPRA Referrals 	Lilly, Tiger J254875MP68464	4 1 🖸				Snapsho
 Client List Client Profile Linked Consents Non-Episode Contact Activity List Intake Program Enroll Encounters Notes Consent GPRA Referrals 	Home Page					Add GPRA Intake
 Client List Client Profile Linked Consents Non-Episode Contact Activity List Intake Program Enroll Encounters Notes Consent GPRA Referrals 	Agency	Action	Interview Type	Client type	Interview Date	Record Status
Linked Consents Non-Episode Contact Treatment Client 8/8/2019 Completed Activity List Intake Edit Del Edit Del Edit Figure 1 Edit Edit Del Edit <	✓ Client List	A	Intake	Treatment Client	2/4/2019	Completed
Linked Consents Non-Episode Contact Activity List Intake Program Enroll Encounters Notes Consent GPRA Referrals Treatment Client 8/8/2019 Completed Complet	Client Profile		6-Month Follow Up	Treatment Client	7/15/2019	Completed
 Activity List Intake Program Enroll Encounters Notes Consent GPRA Referrals 					8/8/2019	Completed
 Encounters Notes Consent GPRA Referrals 						
 Notes Consent GPRA Referrals 	Program Enroll					
Consent GPRA Referrals	Encounters					
GPRA Referrals	Notes					
Referrals	Consent					
	GPRA					
Entered a 1 list	Referrals					
Episode List	Episode List					

Figure 4-1: GPRA Menu displaying previously entered GPRA Interviews with Actions

Tip: Depending on the existing interview record(s), the choice of adding a GPRA Follow up or a GPRA Discharge is available. The first GPRA Interview that can be added is the GPRA Intake.

Table 4-1: Available Actions for GPRA Interviews

Action	Description			
View	Opens the interview in read-only mode.			

Action	Description	
Edit	Opens the interview in edit mode, where certain fields can be updated. A Save button is available on screen, and when clicked, an information	
	message will appear stating that the record has been successfully updated. Cancel Save >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	
	Record updated successfully.	t –
Delete	A confirmation screen will appear, prompting the user to select 'Yes' or 'No' to continue with deleting the record.	С
	You are about to delete a 6-month follow-up record for this client. Would you like to continue?	
	If a client has follow-up or discharge interview(s), those interviews must be deleted before the intake interview can be deleted.	
	C Before you delete the intake interview, you must first delete the follow-up or discharge interview(s).	c

Completing Interviews

Action Buttons

GPRA Interviews must be completed in one session and all questions must be answered to save the record. Clicking **Cancel** will cancel adding the GPRA interview. Users progress through the interview by completing the required fields on screen and then clicking the **right-arrow** button to move to the next set of questions. Each field must be completed before moving to the next screen.

Ex. Juniper J044788SJ884654 1		🖹 Generate Report 📔									
Home Page		A. RECORD MANAGEMENT - SER	VICES —				7				
▶ Agency	PLANNED SERVICES [REPORTED BY PROGRAM STAFF ABOUT CLIENT ONLY AT INTAKE/BASELINE]										
✓ Client List		Identify the services you plan to provide to the client during the client's course of treatment/recovery Modality									
► Client Profile		1. Case Management	No 🔻	9.	Detoxification (Select Only One)						
- Activity List		2. Day Treatment	No 💌		A. Hospital Inpatient	No 👻					
Intake		 Inpatient/Hospital (Other Than Detox) 	No 🔻		B. Free Standing Residential	No 🔻					
Program Enroll		4. Outpatient	No 🔻		C. Ambulatory Detoxification	No 🔻					
▼ GPRA		5. Outreach	No 💌	10.	After Care	No 🔻					
		6. Intensive Outpatient	No 🔻	11.	Recovery Support	No 🔻					
Diagnoses		7. Methadone	No 🔻	12.	Other (Specify)	No 👻					
Planned Services		8. Residential/Rehabilitation	No 💌								
Service 1											
Encounters					Canc						
Consent					Cano		'				
Referrals											

Figure 4-2: GPRA Interview Left and Right-arrow Buttons

Users can choose to go back to a prior screen by clicking the **left-arrow** button, however, answers to the current screen will be lost (a confirmation screen will appear, prompting users to select 'Yes' or 'No' before proceeding).



Figure 4-3: GPRA Confirmation message displayed when left-button is clicked

Automation (Skip Logic)

Based on the client's response to certain questions, the screen will update causing some questions to become required and/or automatically filled in as read-only fields. For example, if the client has not served in the military (answered "No" to Section A Question 5), the system will automatically fill in the other military questions with "Not Applicable".

A. M	A. MILITARY FAMILY AND DEPLOYMENT 5. Have you ever served in the Armed Forces, in the Reserves, or in the National Guard? [IF SERVED] What area, the Armed Forces, Reserves, or National Guard did you serve? NO							
5a.	Are you currently on active duty in the Armed Forces, in the Reserve the Armed Forces, Reserves, or National Guard?	s, or in the Natior	ial Gua	rd? [IF ACTIVE] V	Vhat area,			
	Not Applicable	Ŧ						
5b. Have you ever been deployed to a combat zone? [SELECT ALL THAT APPLY]								
	Never Deployed	Not Applicable	Ŧ					
	Iraq or Afghanistan (e.g., OEF/OIF/OND)	Not Applicable	v					
	Persian Gulf (Operation Desert Shield/Desert Storm)	Not Applicable	Ŧ					
	Vietnam/Southeast Asia	Not Applicable	v					
	Korea	Not Applicable	Ŧ					
	WWII	Not Applicable	Ŧ					
	Deployed to a combat zone not listed above (e.g., Bosnia/Somalia)	Not Applicable	v					
				Cancel				

Figure 4-4: GPRA Interview, Automation (skip logic) example

Answers Reviewed

Answers to some questions are also checked with responses given in subsequent sections. For example, the value in field B.1.d (used both alcohol and drugs (on the same day)) should not exceed value in B.1.c (used illegal drugs).

O Value in fiel	d B.1.d should not exceed value in	B.1.c.		×
	B. DRUG AND ALCOHOL USE	ave you used th	le following:	
		# of Days	RF/DK	
	a. Any alcohol	26	¥	
	b1. Alcohol to intoxication (5+ drinks in on sitting)	9 1	¥	
	b2. Alcohol to intoxication (4 or fewer drinks	2	Ŧ	
	in one sitting and felt high)			
	c. Illegal drugs	4	w.	
	d. Both alcohol and drugs (on the same day)	5	¥	
			Cancel	

Figure 4-5: Reviewed Answers Example (Section B.), Number of days used alcohol and drugs

You reported that you have used illegal drugs during the past 30 days (B.1.c), then E4 (how many times have you committed a crime) should be no less than B.1.c, since taking illegal drugs is a crime. Do you wish to continue?

E Fox, Juniper J044788SJ884654	10			🖹 Generate R	eport	Snapshot
Home Page Agency		ported that you have used illegal drugs during the past 30 day nitted a crime) should be no less than B.1.c, since taking illega				
 ✓ Client List ▶ Client Profile 	[- E. CRIME AND CRIMINAL JUSTICE STATUS				
		1. In the past 30 days, how many times have you been arrested?	Times 0	RF/DK	v	
Program Enroll ▼ GPRA		In the past 30 days, how many times have you been arrested for drug-related offenses?	h!!-h-t-	Not Applica RF/DK	v	
A. Record Mgmt		3. In the past 30 days, how many nights have you spent in jail/prison?	Nights 0		v	
Demographics ► Military		4. In the past 30 days, how many times have you committed a crime?	Times 0	RF/DK	v	
 B. Drug/Alcohol C. Family & Living D. Education/Emp 		 Are you currently awaiting charges, trial, or sentencing? Are you currently on parole or probation? 	No No	v v		
E. Criminal Justice ▶ Encounters				Cancel	()	

Figure 4-6: Reviewed Answers Example (Section E.), Used illegal drugs

Entry for Question B.3 should be 'YES' if the Route for any substance is 'Non-IV Injection' or 'IV'.

GPRA Intake Interview



Follow the steps below to add a GPRA Intake Interview.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.

Standard SOR Q	A Provider Agency, Pr	rovider Facility 🖋		Jones, Ashl	ey; Clinician ▼ Ξ Logout
					 Snapshot
Home Page	Client Search				
▶ Agency	Agency	Provider Agency	Facility		v
	First Name		Last Name		
 Client Profile 	SSN		DOB		
Linked Consents	Standard SOR QA Client Id		Provider Client ID		
Non-Episode Contact	Unique Client Number		Primary Care Staff		
Activity List	Treatment Staff		Intake Staff		Ŧ
Episode List	Case Status	All Clients	Number Type		*
 System Administration 	Other Number				
Reports	Include Only Active Consents	Yes v			
	Client List (<u>Export</u>)				Clear Go
	Actions Unique Client#	Fullmame	DOB	SSN	Gender
	J584688SJ884664	ox, Juniper	1/24/2002	242-22-4444	Female
	J254875MP684644 Profile	Lilly, Tiger	8/1/2004	777-33-4321	Female

- 2. On the left menu, click **GPRA**.
- 3. On the GPRA List screen, click Add GPRA Intake.

Ex. Juniper J044788SJ88	34654 1				 Snapshot
Home Page	0 N	o results match your	search criteria.		×
▶ Agency				_	Add GPRA Intake
Client Profile	Action 1	<u>nterview Type</u>	Client type	Interview Date	Record Status
- Activity List					
Intake					
Program Enroll					
GPRA					
Encounters					
Consent					
Referrals					
Episode List					

Figure 4-7: Add GPRA Intake

4. The system will display the first of several GPRA Interview screen. Complete the required fields.

Note: The 'Interview Date' must be greater than or equal to client intake date.

The 'Interview Date' must occur during the active period of the selected Program Enrollment (MM/DD/YYY -).

Home Page	C A. RECORD MANAGEMENT
Agency	Unique Client Number J044788SJ884654
	Contract/Grant ID TI081695
Client Profile	Client Type Treatment Client
- Activity List	Interview Type Intake
Intake	Did you conduct an interview?
Program Enroll	Interview Date mm/dd/yyyy
✓ GPRA	Program Enrollment Facility 1/State Opioid Response (SOR) : 6/3/2019 -
A. Record Mgmt	Created Date:
 Encounters 	Created By:
Consent	Updated Date:
Referrals	Updated By:
Episode List	Upload Action:
 System Administration 	Upload Status:
Reports	Number of Upload Errors:
	Upload Date:
	Response Date:

Figure 4-8: GPRA Intake, Record Management section

- 5. Click the **right-arrow** to move to the next GPRA section.
- 6. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.

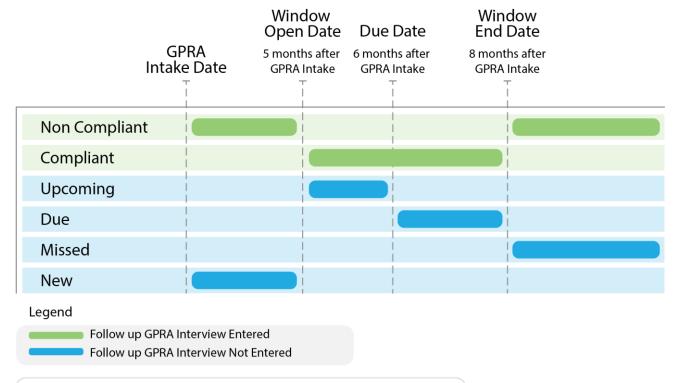
. In the past 30 days, did you attend any voluntary self-help groups for recovery that were not affiliated with a religious	No	Times	RF/DK Not Applicable
or faith-based organization? [In other words, did you participate in a non-professional, peer-operated organization that is devoted to helping individuals who have addiction related problems such as: Alcoholics Anonymous, Narcotics Anonymous, Oxford House, Secular Organization for Sobriety, or Women for Sobriety, etc.]			
In the past 30 days, did you attend any religious/faith affiliated recovery self-help groups?	No		Not Applicable
In the past 30 days, did you attend meetings of organizations that support recovery other than the organizations described above?	No		Not Applicable
In the past 30 days, did you have interaction with family and/or friends that are supportive of your recovery?	Yes		
5. To whom do you turn when you are having trouble?	Friends		
Other (Specify):			
6. How satisfied are you with your personal relationships?	Neither Satisfie	d nor Dissat	tisfied

Figure 4-9: Intake Interview, Summary Screen

GPRA Interview Compliance Details

Grant Requirement

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



Compliance Rate Calculation = Number Compliant / (Number Compliant + Number Non Compliant + Number Due + Number Missed)

Figure 4-10: GPRA Follow-up Due Diagram

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

Table 4-2: Follow up Attendance Definitions

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

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

GPRA Follow-up Due Summary Screen



Where: Agency > GPRA Follow-up Due Summary

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

The search results will display a distinct count of GPRA interviews for each follow-up status available at the time of searching. For definitions of each status, see *Table 4-2: Follow up Attendance Definitions* on page 35 above.

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

Table 4 2.		Fallow was	D	Cuine ne en	· Caraan	Coorch Filtore
12016 4-5	(JPKA	F() ()VV- ()	1 JUP	Summan	/ Screen	Search Filters

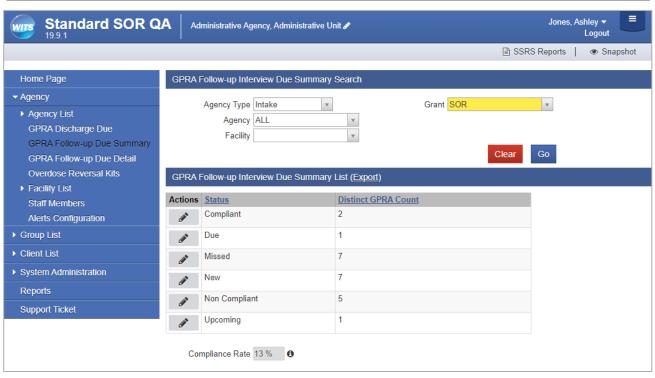


Figure 4-11: GPRA Follow-up Due Summary screen

Detailed information for each interview status can be seen by hovering over the pencil icon in the Actions column, then clicking **Details**. The system will then redirect to the GPRA Follow-up Due Detail screen, displaying the associated client records for the selected interview status and the current search criteria. The GPRA Follow-up Due Detail screen is covered in the next section.

GPRA Follow-up Interview Due Summary List (Export)						
Actions	Status	Distinct GPRA Count				
ø	Compliant	2				
ø	Due	1				
ø	Missed	7				
ø	New	7				
ø	Non Compliant	5				
/	Upcoming 1					
Cor	Details					

Figure 4-12: GPRA Follow-up Interview Status List, Details link

GPRA Follow-up Due Detail Screen



Where: Agency > GPRA Follow-up Due Detail

The **GPRA Follow-up Due Detail** screen displays a list of client records with information regarding the clients' GPRA interview status. Staff members can use the available search fields and click **Go** to view the results.

Table 4-4: GPRA Follow-up Due Detail Screen Search Filters

Field	Description
Agency Type	In the Agency Type search field, the option " Intake " represents the agency where the GPRA Intake Interview was conducted. The option, " Follow-up " represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be prepopulated with the SOR grant.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has View GPRA Follow Up Compliance and All Agency Access roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has View GPRA Follow Up Compliance and All Agency Access roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.
Status	The Status search field will filter the list of clients corresponding to a specific compliance status. For definitions of each status, see <i>Table 4-2: Follow up Attendance Definitions</i> on page 35 above.

Home Page	GPRA Follow-up Interview Due Detail Search
Agency Agency List GPRA Discharge Due GPRA Follow-up Due Summary GPRA Follow-up Due Detail	Agency Type Intake Agency ALL Facility GPRA Intake Date First Name
Overdose Reversal Kits Facility List Staff Members Alerts Configuration 	Due Date Last Name Status Within Window Unique Client Number Go
Group List Client List System Administration Reports	Actions Unique Client Number Client Name Agency Name Facility Name Status GPRA Intake Date Due Date Followup Open Date Followup Close Actions Unique Client Number Client Name Agency Name Facility Name Status GPRA Intake Date Due Date Followup Open Date Followup Close Image: Status Image: Status

Figure 4-13: GPRA Follow-up Due Detail screen

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

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

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

Standard SOR Q	A Ad	ministrative Agency, /	Administrat	ive Unit 🖋					Jones, As	hley ▼
								SSRS	Reports	Snapshot
Home Page	0 T	he records on this li	st may no	t match the tota	I from the s	ummary be	cause you ma	ay not have a	access to son	ne clients. 🗙
✓ Agency	GPRA	Follow-up Interview	Due Detai	il Search						
Agency List	011011	onon up mornen	Duo Dola	loodion						
GPRA Discharge Due		Agency Type Intake	•	w		Grant SO	R	¥.		
GPRA Follow-up Due Summary		Agency ALL		v						
GPRA Follow-up Due Detail		Facility		v						
Overdose Reversal Kits	GPR	A Intake Date			Firs	t Name				
Facility List		Due Date			las	st Name				
Staff Members		Status Upcor	mina	× Ur	ique Client I	Number				
Alerts Configuration		olado opeoi			inquo onone i					
▶ Group List							Clea	ir Go		
Client List	GPRA F	Follow-up Interview	Due Deta	il List <u>(Export</u>)						
 System Administration 	Actions	<u>Unique Client</u> <u>Number</u>	<u>Client</u> <u>Name</u>	Agency Name	<u>Facility</u> <u>Name</u>	<u>Status</u>	GPRA Intake Date	Due Date	Followup Open Date	Followup Close Date
Reports	ø	J553779EN601544	jain, Rekha	Newest SOR Agency	facility 1	Upcoming	4/18/2019	10/18/2019	9/18/2019	12/18/2019
Support Ticket			- contra	, igonoy						

Figure 4-14: GPRA Follow-up Due Screen, pre-populated based on Summary screen selections

In the **Actions** column, clicking the "**View**" link will redirect to the client's GPRA list screen if the staff member is currently in the same context agency as the client. If the staff members' context agency is different than the client, clicking the "View" link will display the following error message, *"This client does not exist in the context agency. Please change your context agency to view the client."*

GPRA Follow-up Inte	erview Due Deta	il Search						
Agency Type	Intake	*		Grant SO	R	v		
Agency	ALL							
Facility		*						
GPRA Intake Date			Firs	st Name				
Due Date			Las	st Name				
Status	Upcoming	v L	Inique Client I	Number				
					Clea	r Go		
GPRA Follow-up Inte	erview Due Deta	il List <u>(Export</u>)						
Actions Unique Clier	nt <u>Client</u> <u>Name</u>	Agency Name	Entry Facility Name	<u>Status</u>	<u>GPRA</u> Intake Date	Due Date	<u>Followup</u> <u>Open Date</u>	Followup Close Date
J553779EN6 View	01544 jain, Rekha	Newest SOR Agency	facility 1	Upcoming	4/18/2019	10/18/2019	9/18/2019	12/18/2019

Figure 4-15: GPRA Follow-up Due Detail, View link

Note: If you have access to multiple agencies, make sure you're in the correct context agency to view the client record. Otherwise, the following error message will be displayed.

"This client does not exist in the context agency. Please change your context agency to view the client."

O This client does not exist in the context agency. Please change your context agency to view the client. 💦 🗙

GPRA Follow-up Interview

Where: Client List > Activity List > GPRA > GPRA Follow-up

GPRA Follow-up Interviews should be added 5 to 8 months after a client's GPRA Intake Interview Date. Follow-up GPRA Interviews include additional questions to record the follow-up status. To add a follow-up record, follow the steps below.

Note: If a follow-up interview has been conducted, sections B through G and I must be completed.

If the follow-up interview has *not* been conducted, section I must be completed.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.

Standard SOR Q	A Provider Agency, Pr	ovider Facility 🖋		Jones, Ashley	; Clinician ▼ Ξ Logout
					Snapshot
Home Page	Client Search				
Agency	Agency	Provider Agency	Facility		Ŧ
✓ Client List	First Name		Last Name		
Client Profile	SSN		DOB		
Linked Consents	Standard SOR QA Client Id		Provider Client ID		
Non-Episode Contact	Unique Client Number		Primary Care Staff		
 Activity List 	Treatment Staff	v	Intake Staff		*
Episode List	Case Status	All Clients	Number Type		*
 System Administration 	Other Number				
Reports	Include Only Active Consents	Yes 💌			
					Clear Go
	Client List (Export)				Add Client
	Actions Unique Client #	Full ame	DOB	SSN	Gender
	J584688SJ884664	ox, Juniper	1/24/2002	242-22-4444	Female
	J254875MP684644	Lilly, Tiger	8/1/2004	777-33-4321	Female
	Profile /	Activity List Linked Consent	s		

- 2. On the left menu, click **GPRA**.
- 3. On the GPRA List screen click Add GPRA Follow-up.

Standard SOR (rovider Agency, Provide	er Facility 🥒		Jones, Ashley; Clinician ▼ Logout
Lilly, Tiger J254875MP68464	14 1 6				Snapshot
Home Page			Add	GPRA Intake Add GPRA F	ollowup Add GPRA Discharge
Agency	Action	Interview Type	Client type	Interview Date	Record Status
✓ Client List	ø	Intake	Treatment Client	2/4/2019	Completed
 Client Profile Linked Consents 					

Figure 4-16: GPRA list, Add GPRA Follow-up link

4. The system will display a confirmation screen stating, "You are about to enter a 6-month follow-up record for this client. Would you like to continue?" Select **Yes** to start the follow-up interview.





Note: The system will display a warning message if the Follow-up Interview Date is not within 5 to 8 months after the GPRA Intake Interview Date. This message will also be displayed on the GPRA list screen.

A Follow-up interview date should be between 5 to 8 months after the GPRA intake interview date.

Lilly, Tiger J254875MP68	4644 1 🗳	•			 Snapshot
Home Page	A	Follow-up interview date	should be between 5 to 8 month	is after the GPRA intake intervi	ew date.
Agency			Add	GPRA Intake Add GPRA Fo	blowup Add GPRA Discharge
✓ Client List					
Client Profile Linked Consents	Action	Interview Type Intake	Client type Treatment Client	Interview Date 2/4/2019	Record Status Completed
Non-Episode Contact	Ø	6-Month Follow Up	Treatment Client	6/14/2019	Completed

5. When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen. If the interview was not conducted (answered "No" to the question "Did you conduct an interview?"), clicking the right-arrow button will display Section I. Follow-up Status.

Lilly, Tiger J254875MP684644	1 O Generate Report O Snapshot
Home Page	A. RECORD MANAGEMENT
► Agency	Unique Client Number J254875MP684644
✓ Client List	Contract/Grant ID SORGrantNo
Client Profile	Client Type Treatment Client Interview Type 6-Month Follow Up
Linked Consents	Did you conduct an interview?
Non-Episode Contact	Interview Date mm/dd/yyyy
→ Activity List	Program Enrollment Provider Facility/SOR MAT : 2/1/2019 -
Intake Program Enroll	Created Date:
Encounters	Created By:
Notes	Updated Date:
Consent	Updated By:
▼ GPRA	Upload Action:
A. Record Mgmt	Upload Status:
Referrals	Number of Upload Errors:
Episode List	Upload Date:
 System Administration 	Response Date:
Reports	
	Cancel

Figure 4-18: GPRA Follow-up, Section A. Record Management

X

6. In **Section A. Record Management - Behavioral Health Diagnoses**, if the client had medications selected on their encounter(s) within the grant episode, and the user answers "**Yes**" to questions 1a or 2a, then medication information will be prepopulated on screen. Users can modify this prepopulated information as needed.

Note: Encounters may have been entered in other agencies than yours.

The Received field will be set to "Yes" for each medication listed on the encounter(s), and "No" to all other medications. For each drug received, the number of days will be set based on the encounter(s) of the client's grant episode, and when the encounter service start date or end date were 30 days or less from the GPRA interview date. If more than one drug was selected on an encounter, then the same number of days for each drug on the GPRA discharge and Follow ups will be set. The number of days is based on encounter service start date/end date. If the encounter has no end date, it will be counted as one day. If multiple encounters are entered on the same day, then it counts 1 day per medication.

lease behavio	ral health diagon	Plassification of Diseases	IContion (ICD-10-CI
	¥		
In the past 30 days, was the client diagn	osed with an opioid use disorder? Yes	v.	
	approved medication did the client receive for	or the treatment of this opioid use disorder?	
	Received	# of Days	
Methadone	Yes	× 1	
Buprenorphine	Yes	▼ 1	
Naltrexone	No	v	
Extended-release Naltrex	cone Yes	v 1	
. In the past 30 days, was the client diagn	osed with an alcohol use disorder? Yes	· ·	
a. In the past 30 days, which FDA- (Select all that apply)	approved medication did the client receive for	or the treatment of this alcohol use disorder?	
	Received	# of Days	
Naltrexone	No	· ·	
	cone Yes	▼ 1	
Extended-release Naltrex			
Extended-release Naltrex Disulfiram	No	Y	

Figure 4-19: GPRA Follow-up Interview, Section A, questions 1a and 2a, prepopulated values

i Note: For question I.1., make sure to select the correct follow-up status for the client from the drop-down list, especially when selecting if the interview was completed *within* specified window, or *outside* specified window.

1. What is the follow-up status of the client?			
If "Unable to locate, other", (Specify)		Q	
2. Is the client still receiving services from y			
	Deceased at time of due date		
	Completed interview within specified window		
	Completed interview outside specified window		
	Located, but refused, unspecified		<u> </u>
	Located, but unable to gain institutional access		
	Located, but otherwise unable to gain access		
	Located, but withdrawn from project		
	Unable to locate, moved		
	Unable to locate, other		

7. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.

In the past 30 days, did you attend any voluntary self-help groups for recovery that were not affiliated with a religious or faith-based organization? [In other words, did you participate in a non-professional, peer-operated organization that is devoted to helping individuals who have addiction related problems such as: Alcoholics Anonymous, Narcotics Anonymous, Oxford House, Secular Organization for Sobriety, or Women for Sobriety, etc.]	Times RF/DK Yes 5
. In the past 30 days, did you attend any religious/faith affiliated recovery self-help groups?	No Not Applicable
 In the past 30 days, did you attend meetings of organizations that support recovery other than the organizations described above? 	No Not Applicable
. In the past 30 days, did you have interaction with family and/or friends that are supportive of your recovery?	Yes
. To whom do you turn when you are having trouble?	Family member
Other (Specify):	
. How satisfied are you with your personal relationships?	Neither Satisfied nor Dissatisfied
FOLLOW-UP STATUS	
What is the follow-up status of the Completed interview with	nin specified window
client?	
client? Completed Interview with If "Unable to locate, other", (Specify)	

8. If the GPRA Follow up interview was conducted within the 5 to 8 months window, and if no GPRA Discharge exists for this client's grant episode, then the system will display a confirmation screen asking if you would like to create a GPRA Discharge interview with the same information as the GPRA Follow up interview:



Select **Yes** and the GPRA Discharge will automatically be created. It is recommended that you review the newly created GPRA Discharge interview and make any updates as necessary. For example, **section J – Discharge Status** may need questions 3. and 4. updated from "No" to "Yes", if it applies.

 On what date was the client discharged? 	8/1/2019	mm 🛗	/dd/yyyy		
2. What is the client's discharge status?	Completio	n/Graduate			
If the client was terminated, what was	the reason fo	or terminatio	n?		
Not Applicable					v
Other (Specify)					
3. Did the program test this client for HIV?	No		v		
4. Did the program refer this client for testing?	No		w.		

Figure 4-20: Discharge Status

GPRA Discharge Due Screen

Where: Agency > GPRA Discharge Due

The **GPRA Discharge Due** screen displays at the Agency level, clients with a GPRA Intake interview date 30 days ago and the client has no encounter, or their most recent encounter is 30 days ago. Users can select from the available search fields and click **Go** to view the search results. In the **Actions** column, clicking the "**View Client**" link will redirect to the client's GPRA list screen if the staff member is currently in the same context agency as the client.

Table 4-5: GPRA Discharge Due Screen Search Filters

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

Standard SOR Q	Provider Age	ncy, Provider Facility 🖋			Jones,	Ashley; Clinician - Logout	
						👁 Snaj	pshot
Home Page	GPRA Discharge	e Due Search					
Agency Agency List GPRA Discharge Due GPRA Follow-up Due Summary GPRA Follow-up Due Detail	Agency First Name Intake Interview date	ALL	Grant Grant Last Name Last Activity Date	SOR	¥	Clear	Go
Overdose Reversal Kits	GPRA Dischar	ge Due List <u>(Export)</u>					
Client List System Administration Reports	Actions <u>Client ID</u>	Client Name Intake	Interview Agency	Intake Date	Intake Interview Date	Last Activity Date	

Figure 4-21: GPRA Discharge Due Screen

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

Standard SOR C		ency, Provider Facility 🖋				Logout
						Snapsh
Home Page	GPRA Discharg	e Due Search				
Agency Agency List GPRA Discharge Due GPRA Follow-up Due Summary GPRA Follow-up Due Detail Overdose Reversal Kits	Agency First Name Intake Interview date GPRA Discha		Grant SOR Last Name Last Activity Date	Y	Clear	Go
Client List	Actions Client ID	Client Name	Intake Interview Agency	Intake Date	Intake Interview Date	Last Activity Date
 System Administration 	/ 117	singh, Praneeti	AgencySor1	7/18/1991	5/31/2019	
Reports	J 119	Sano, Rhea	Administrative Agency	1/16/2019	2/28/2019	8/30/2019
	7 8	SOR, Nicole	Administrative Agency	1/23/2019	6/4/2019	
	126	Jainh, Muskan	Administrative Agency	1/1/2019	7/1/2019	9/30/2019
	View	Client	AgencySor1	1/1/2019	7/1/2019	9/30/2019
	112	Aggarwal, Divya	Administrative Agency	12/25/2018	7/1/2019	

Figure 4-22: GPRA Discharge Due screen, View Client link

GPRA Discharge Interview

Where: Client List > Activity List > GPRA > GPRA Discharge

To add a discharge record, follow the steps below.

i Note: If a Discharge interview has been conducted, Sections B through G, J and K must be completed.

If the Discharge interview *has not* been conducted, **Sections J** and **K** must be completed.

1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.

Standard SOR Q	A Provider Agency, Pr	rovider Facility 🖋		Jones, As	hley; Clinician ▼
					Snapshot
Home Page	Client Search				
► Agency	Agency	Provider Agency	Facility		v
✓ Client List	First Name		Last Name		
Client Profile	SSN		DOB		
Linked Consents	Standard SOR QA Client Id		Provider Client ID		
Non-Episode Contact	Unique Client Number		Primary Care Staff		
Activity List	Treatment Staff		▼ Intake Staff		*
Episode List	Case Status	All Clients	 Number Type 		w
 System Administration 	Other Number				
Reports	Include Only Active Consents	Yes			
	Client List (<u>Export</u>)				Clear Go
					<u>riae onom</u>
	Actions <u>Unique Client #</u>	Full ame	DOB	SSN	Gender
	J584688SJ884664	ox, Juniper	1/24/2002	242-22-4444	Female
	J254875MP684644		8/1/2004	777-33-4321	Female
	Profile /	Activity List Linked Cons	ents		

- 2. On the left menu, click **GPRA**.
- 3. On the GPRA List screen, click Add GPRA Discharge.

Standard SOF		rovider Agency, Provider Fa	cility 🖋		Jones, Ashley; Clinician ◄ Logout
Lilly, Tiger J254875MP68	4644 1				Snapshot
Home Page			Add GPI	RA Intake Add GPRA Fo	llowup Add GPRA Discharge
▶ Agency	Action	Interview Type	Client type	Interview Date	Recordinatus
	ø	Intake	Treatment Client	2/4/2019	umpleted
 Client Profile Linked Consents Non-Episode Contact 	Ø	6-Month Follow Up	Treatment Client	7/15/2019	Completed

Figure 4-23: GPRA List screen, Add GPRA Discharge link

4. The system will display the following message, "You are about to enter a discharge record for this client. Would you like to continue?" Select **Yes** to start the discharge interview.

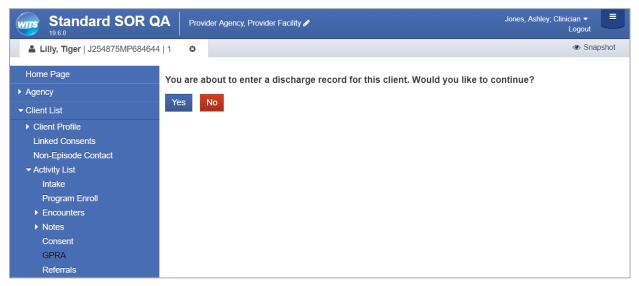


Figure 4-24: Discharge interview confirmation screen

5. When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen. If the interview was not conducted (answered "No" to the question "Did you conduct an interview?"), clicking the right-arrow button will display Section J. Discharge Status.

A. RECORD MANAGEMENT	
Unique Client Number	J173991EN823554
Contract/Grant ID	SORGrantNo
Client Type	Treatment Client
Interview Type	Discharge
Did you conduct an interview?	Y
Interview Date	mm/dd/yyyy
Program Enrollment	Administrative Unit/NewSor : 2/1/2019 -
Created Date:	
Created By:	
Updated Date:	
Updated By:	
Upload Action:	
Upload Status:	
Number of Upload Errors:	
Upload Date:	
Response Date:	
	Cancel

Figure 4-25: GPRA Discharge Interview; Section A. Record Management

6. In **Section A. Record Management - Behavioral Health Diagnoses**, if the client had medications selected on their encounter(s), and the user answers "**Yes**" to questions 1a or 2a, medication information will be prepopulated on screen. Users can modify this prepopulated information as needed.

Note: Encounters may have been entered in other agencies than yours.

The Received field will be set to "Yes" for each medication listed on the encounter(s), and "No" to all other medications. For each drug received, the number of days will be set based on the encounter(s) of the client's grant episode, and when the encounter service start date or end date were 30 days or less from the GPRA interview date. If more than one drug was selected on an encounter, then the same number of days for each drug is set on the GPRA discharge and Follow ups. The number of days is based on encounter service start date/end date. If the encounter has no end date, it will be counted as one day. If multiple encounters are entered on the same day, 1 day per medication is counted.

A. RECORD MANAGEMENT - BEHAVIORAL HEALTH DIAGNOS	SES	
Please the behavioral health diagno	Classification of Disea	ses 10 (ICD-10-CM)
 In the past 30 days, was the client diagnosed with an opioid use of the past 30 days. 	v disorder? Vos	
 a. In the past 30 days, which FDA-approved medication did (Select all that apply) 		s opioid use disorder?
	Received	# of Days
Methadone	Yes	▼ 1
Buprenorphine	Yes	× 1
Naltrexone	No	v
Extended-release Naltrexone	Yes	× 1
 In the past 30 days, was the client diagnosed with an alcohol use a. In the past 30 days, which FDA-approved medication did (Select all that apply) 		alcohol use disorder?
	Received	# of Days
Naltrexone	No	v
Extended-release Naltrexone	Yes	× 1
Disulfiram	No	v
Acamprosate	No	v
		Cancel 📢 🍅

Figure 4-26: GPRA Discharge Interview, Section A, questions 1a and 2a, prepopulated values

7. Complete the required fields and click the **right-arrow** button to progress to the next screen.

Standard SOR QA		der Agency, Provider Facility 🖋	Jones, Ashley; Clinician ▼ Logout		
Lilly, Tiger J254875MP684644 1	0		Generate Report	I I Snapshot	
Home Page		J. DISCHARGE STATUS			
 ✓ Client List 		2. What is the client's discharge status? If the client was terminated, what was the reason for termination?			
Client Profile Linked Consents Non-Episode Contact		Not Applicable Other (Specify)		v	
✓ Activity List Intake		Did the program test this client for HIV? Did the program refer this client for testing? Not Applicable *			
Program Enroll Encounters 			Cancel	*	

Figure 4-27: Section J. Discharge Status

8. **Section K – Services Received** will be prepopulated based on the encounter(s) recorded for the client within the grant episode (encounters may have been entered in other agencies than yours). You may edit this section as needed.

I. Case Management	0	9. Detox	ification (Select Only One))
2. Day Treatment	0	A. Ho	spital Inpatient	0
 Inpatient/Hospital (Other Than Detox) 	0	B. Fre	e Standing Residential	0
4. Outpatient	25	C. Am	bulatory Detoxification	0
5. Outreach	0	10. After (Care	0
Intensive Outpatient	0	11. Recov	very Support	5
7. Methadone	0	12. Other	(Specify)	0
8. Residential/Rehabilitation	0			

Figure 4-28: Section K. Services Received; Number of Days of Services

PROVIDED.]	Sessions	5/10/01	D HAVE AT LEAST ONE SESSION	Sessions
1. Screening	0	8.	Group Counseling	1
2. Brief Intervention	0	9.	Family/Marriage Counseling	0
3. Brief Treatment	0	10.	Co-Occurring Treatment/ Recovery Services	0
4. Referral to Treatment	0	11.	Pharmacological Interventions	10
5. Assessment	0	12.	HIV/AIDS Counseling	0
6. Treatment/Recovery Planning	0	13.	Other Clinical Services (Specify)	0
7. Individual Counseling	5			

Figure 4-29: Section K. Services Received; Number of Sessions Provided

Please contact your system administrator if you believe encounters exist for this client but the Services Received section is not populated with the number of days and sessions; the mapping of the modalities and services may be incomplete.

9. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.

Education Services 1. Substance Abuse Education 2. HIV/AIDS Education	Sessions 0	3. Other Education Services (Specify)	Sessions 0
Peer-To-Peer Recovery Support Services	Sessions		Sessions
 Peer Coaching or Mentoring Housing Support 	0	 Information and Referral Other Peer-to-Peer Recovery Support Services (Specify) 	0 0
Alcohol-and Drug-Free 3. Social Activities	0		

Part 5: Supplemental Questions

Florida has a need to ask additional questions pertaining to the SOR grant within the GPRA interviews because the current GPRA questions do not fully assess the client's life situation during GPRA Intake, Discharge and Follow up. These questions are shown in the figure below.

SUPPLEMENTAL QUESTIONS

- 1. Was this individual receiving MAT services funded by another funding source (Ex: another grant: STR, Block, etc.) previous to enrollment in State Opioid Response (SOR) funding?
 - Was the individual previously enrolled in STR funding?
 - Date of Enrollment in STR funded services?
- 2. What Medication-Assisted Treatment (MAT) are you receiving at the time of this interview?
- 3. In your lifetime, how many non-fatal opioid overdoses have you experienced? (IF ZERO OVERDOSES, ENTER 0)
- 4. In the past 30 days, how many a non-fatal opioid overdoses have you experienced? (IF ZERO OVERDOSES, ENTER 0)
 - For your last overdose, were you administered Naloxone (Narcan)?
 - For your last overdose, was a 911/ambulance/emergency services/fire & rescue called?
 - For your last overdose, did you receive medical treatment in a hospital (emergency room or general admission)?
- 5. Do you always carry naloxone to administer in case of an Opioid overdose?
- 6. Have you been offered Naloxone by your MAT provider?

Figure 5-1: Supplemental Questions

Supplemental questions will be asked on all new GPRA interviews in a section labeled, "Supplemental Questions" as shown in Figure 5-2. All questions are required including all conditionally enabled questions (which means an answer to one question may require additional responses and those fields will become active on screen).

Florida WITS Tra	ining	Provider 1, Facility 1 🥒			Jones, Ashley ▼ Logout	
& Fox, Juniper J044788SJ88465	4 1 🛛	🖹 Generat	e Report	SSRS F	Reports 👁 Snap	pshot
Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A Record Mgmt B. Drug/Alcohol C. Family & Living D. Education/Emp E. Criminal Justice F. Problems & TX G. Social Connect	1. Was th (Ex: ar Respo Wa 2. What I this inf 3. In you experi 4. In the experi For ress For (en 5. Do you	LEMENTAL QUESTIONS is individual receiving MAT services funded by another funding source nother grant: STR, Block, etc.) previous to enrollment in State Opioid nse (SOR) funding? is the individual previously enrolled in STR funding? the of Enrollment in STR funded services? Wedication-Assisted Treatment (MAT) are you receiving at the time of erview? r lifetime, how many non-fatal opioid overdoses have you enced? (IF ZERO OVERDOSES, ENTER 0) ● past 30 days, how many a non-fatal opioid overdoses have you enced? (IF ZERO OVERDOSES, ENTER 0) ● ryour last overdose, were you administered Naloxone (Narcan)? ryour last overdose, was a 911/ambulance/emergency services/fire & cue called? ryour last overdose, did you receive medical treatment in a hospital hergency room or general admission)? u always carry naloxone to administer in case of an Opioid overdose? ryou been offered Naloxone by your MAT provider?	Vot Application	# # ole v	RF RF Not Applicable	Y
L. Supplemental QuestionsEncounters					Cancel	•

Figure 5-2: New Interview, Supplemental Questions

For all pre-existing GPRA Intake, GPRA Follow-up and GPRA Discharge interviews, the Supplemental Questions screen will be displayed with a default value of "Not Applicable" in all the questions as shown in Figure 5-3 below.

Florida WITS Tra	ining	Provider 1, Facility 1 🥒		Jones, A	shley ▼ _ = Logout
& Fox, Juniper J044788SJ88465	4 1 🛛	G	enerate Report	SSRS Reports	Snapsho
Home Page	∟ L. SUPPL	EMENTAL QUESTIONS			
Agency		is individual receiving MAT services funded by another funding	Not Applicable		
 Client List 		(Ex: another grant: STR, Block, etc.) previous to enrollment in Opioid Response (SOR) funding?			
 Client Profile 	Wa	s the individual previously enrolled in STR funding?			
Linked Consents		te of Enrollment in STR funded services?	Not Applicable		
- Activity List		Vedication-Assisted Treatment (MAT) are you receiving at the			_
Intake		this interview?	Not Applicable		
CONTINUUM Triage™	2	Photos have been a first of the second second second	#		RF
► ASAM		r lifetime, how many non-fatal opioid overdoses have you enced? (IF ZERO OVERDOSES, ENTER 0) (3		Not Applicab	le
Program Enroll			#		RF
▼ GPRA		past 30 days, how many a non-fatal opioid overdoses have you enced? (IF ZERO OVERDOSES, ENTER 0) ③		Not Applicab	le
A. Record Mgmt		· / / -			
Demographics		your last overdose, were you administered Naloxone (rcan)?	Not Applicable		
Military	For	your last overdose, was a 911/ambulance/emergency	Not Applicable		
B. Drug/Alcohol		vices/fire & rescue called? vour last overdose, did vou receive medical treatment in a	Not Applicable		
C. Family & Living	hos	pital (emergency room or general admission)?	Not Applicable		
D. Education/Emp	5. Do you overdo	always carry naloxone to administer in case of an Opioid	Not Applicable		
E. Criminal Justice	6. Have y	you been offered Naloxone by your MAT provider?	Not Applicable		
F. Problems & TX					
Viol & Trauma				Cancel Save	
G. Social Connect				Cancer Save	
L. Supplemental Questions					
Summary					

Figure 5-3: Pre-Existing GPRA Interview, Supplemental Questions screen default values

When a user clicks "**Yes**" to generate a completed discharge GPRA interview based on a follow-up GPRA interview, as shown in Figure 5-4, all values from the follow-up interview will be auto-populated to the discharge interview, including values from the Supplemental Questions section.

Florida WITS Tra	aining	Provider 1, Facility 1 / Jones	, Ashley ▼
Fox, Juniper J044788SJ8846	54 1 🛛 🛚	Generate Report	 Snapshot
Home Page	Do you wa	ant to generate a completed discharge GPRA interview based on this follow-up GPRA interview	1?
Agency	Yes	No	
✓ Client List			
 Client Profile 			
Linked Consents			
Intake			
CONTINUUM Triage™			
► ASAM			
Program Enroll			
GPRA			
Encounters			

Figure 5-4: Generate a Completed Discharge GPRA based on this Follow-up GPRA screen

An informational icon is displayed on questions 3 and 4. When a user hovers over the informational icon, the following text is displayed:

"Non-Fatal Opioid Overdose: A non-fatal incident where an individual has consumed (ingested/inhaled/injected) opioids resulting in loss of consciousness with respiratory and circulatory compromise requires medical intervention via naloxone administration and/or CPR and/or assisted ventilation"

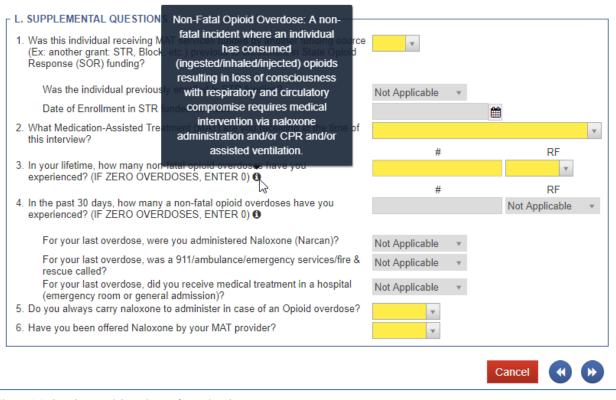


Figure 5-5: Supplemental Questions Informational Icon

Part 6: Post-Discharge Interviews

Two (2) Post-Discharge GPRA interviews are now required with the SOR grant for longer-term tracking of a client's progress. These interviews will be completed at 3 months and 6 months post Discharge and the GPRA questions have been "streamlined" with fewer required fields. Staff will notice some sections/questions are now read-only or hidden from view.

A completed GPRA Discharge is required before these post-discharge interviews can be added.

Note: Clients can only have one "3-Month Post Discharge" and one "6-Month Post Discharge" created per grant episode.

After the GPRA Discharge is complete, the GPRA list screen will display the "Add GPRA 3-Month Post Discharge" link. Once the 3-Month Post Discharge interview is complete, the list screen will display the "Add GPRA 6-Month Post Discharge" link.

Streamlined GPRA Questions

Staff can ask "streamlined" GPRA questions for the 3-Month and 6-Month Post Discharge interviews.

All "streamlined" GPRA questions and responses must be collected on the following screens:

- A. RECORD MANAGEMENT (1st screen)
- B. DRUG AND ALCOHOL USE (# 2a 2c9) and (# 2d 4)
- C. FAMILY AND LIVING CONDITIONS (# 1 3)
- D. EDUCATION, EMPLOYMENT, AND INCOME (# 1, 3 and 5)
- E. CRIME AND CRIMINAL JUSTICE STATUS (# 1 and 2)
- F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATMENT/RECOVERY (# 1, 2c, 3a, 3b and 5)
- G. SOCIAL CONNECTEDNESS (#1 3)
- L. SUPPLEMENTAL QUESTIONS

3-Month Post-Discharge Interview

GPRA 3-Month Post-Discharge Interview should be added 3 months after a client's GPRA Discharge Interview Date. To add a 3-month post-discharge record, follow the steps below.

Note: If the 3-month post-discharge interview has been conducted, sections B through G and section L.
 Supplemental Questions must be completed.

If the 3-month post-discharge interview has *not* been conducted, section A must be completed.

- 1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.
- 2. On the left menu, click **GPRA**.
- 3. On the GPRA List screen, click Add GPRA 3-Month Post Discharge.

Florida WITS To	raining	Provider 1, Facility 1 🎤			Jones, Ashley ▼ Logout
Logical States Fox, Juniper J044788SJ884	654 1	0			SSRS Reports Snapshot
Home Page		Add GPRA Intal	ke Add GPRA Followup	Add GPRA Discharge	Add GPRA 3 month Post Discharge
Agency	Action	Interview Type	Client type	Interview Date	Record Status
✓ Client List	ø	Intake	Treatment Client	1/3/2019	Completed
Client Profile Linked Consents	ø	6-Month Follow Up	Treatment Client	6/7/2019	Completed
✓ Activity List	ø	Discharge	Treatment Client	6/14/2019	Completed
Intake					
CONTINUUM Triage™					
► ASAM					
Program Enroll					
GPRA					
Encounters					

Figure 6-1: GPRA list, Add GPRA 3-Month Post Discharge link

4. The system will display a confirmation screen stating, "You are about to enter a 3-month post-discharge record for this client. Would you like to continue?" Select **Yes** to start the 3-month post-discharge interview.

Florida WITS Tra	aining	Provider 1, Facility 1 🖋 J	ones, Ashley 🗸 📃 Logout
Fox, Juniper J044788SJ8846	54 1 🛛	SSRS Rep	orts 👁 Snapshot
Home Page	You are al	bout to enter a 3-month post-discharge record for this client. Would you lik	e to continue?
▶ Agency			
✓ Client List	Yes	No	

Figure 6-2: 3-Month Post-Discharge Interview Confirmation Screen

5. When the interview opens, complete the required fields and click the **right-arrow** button to progress to the next screen.

Interview Was Not Conducted

If the 3-Month Post-Discharge interview was not conducted (answered "**No**" to the question "Did you conduct an interview?"), clicking the right-arrow button will display the Summary screen. The Summary screen will only contain the section "A. RECORD MANAGEMENT" details. Note the Supplemental Questions are not available.

Example : Fox, Juniper J044788SJ884654 1	☑ Image: Generate Report Image: SSRS Reports Im
Home Page	A. RECORD MANAGEMENT
 Agency 	Unique Client Number J044788SJ884654
✓ Client List	Contract/Grant ID TI081695
Client Profile	Client Type Treatment Client
Linked Consents	Interview Type 3-Month Post Discha
	Did you conduct an interview? No 💌
Intake	Interview Date mm/dd/yyyy
CONTINUUM Triage™	Program Enrollment Facility 1/State Opioid Response (SOR) : 1/3/2019 -
► ASAM	Created Date:
Program Enroll	
▼ GPRA	Created By:
A. Record Mgmt	Updated Date:
Summary	Updated By:
Encounters	Upload Action:
Consent	Upload Status:
Referrals	Number of Upload Errors:
Episode List	Upload Date:
 System Administration 	Response Date:
Reports	Cancel

Click Finish to complete the post-discharge interview and return to the GPRA list screen.

Home Page	A. RECORD MANAGEMENT
Agency	Unique Client Number J044788SJ884654
r Client List	Contract/Grant ID TI081695
Client Profile	Client Type Treatment Client
Linked Consents	Interview Type 3-Month Post Discha
- Activity List	Did you conduct an interview? No
Intake	Interview Date mm/dd/yyyy
CONTINUUM Triage™	Program Enrollment Facility 1/State Opioid Response (SOR) : 1/3/2019 -
► ASAM	
Program Enroll	Created Date:
▼ GPRA	Created By:
A. Record Mgmt	Updated Date:
Summary	Updated By:
Encounters	Upload Action:
Consent	Upload Status:
Referrals	Number of Upload Errors:
Episode List	Upload Date:
System Administration	Response Date:
Reports	
•	Cancel Finish

6. If the post-discharge interview was conducted (answered "**Yes**" to the question "Did you conduct an interview?"), clicking the right-arrow button from the Record Management screen will display section B. Drug and Alcohol Use where questions 1.a.-1.d. are read-only.

Florida WITS Tra	ning Provider 1, Facility 1 / Jones, Ashley - Logout	■
Fox, Juniper J044788SJ88465	I 1	hot
 ▲ Fox, Juniper J044788SJ88465 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt Encounters Consent Referrals 	A. RECORD MANAGEMENT Unique Client Number J044788SJ884654 Contract/Grant ID TI081695 Client Type Treatment Client Interview Type 3-Month Post Dische Did you conduct an interview? Yes V Interview Date 9/5/2019 mm/dd/yyyy Program Enrollment Facility 1/State Opioid Response (SOR) : 1/3/2019 Created Date: Created Date: Updated Date: Updated Date: Updated By: Upload Action: Upload Status:	hot
Episode List	Number of Upload Errors: Upload Date:	
System Administration Reports	Response Date:	
Florida WITS Tra	Cancel Provider 1, Facility 1 Jones, Ashley - Logout	
Fox, Juniper J044788SJ88465	I 1	hot
Home Page > Agency < Client List > Client Profile Linked Consents < Activity List Intake CONTINUUM Triage™ > ASAM Program Enroll < GPRA A. Record Mgmt < B. Drug/Alcohol Drug/Alcohol 1 > Encounters	B. DRUG AND ALCOHOL USE 1. During the past 30 days, how many days have you used the following: a. Any alcohol b1. Alcohol to intoxication (5+ drinks in one sitting) b2. Alcohol to intoxication (4 or fewer drinks in one sitting and felt high) c. Illegal drugs d. Both alcohol and drugs (on the same day) MISSING DATA Not Applicable	

Fox, Juniper J044788SJ884654 1	0			🖹 Gener	ate Report	SSRS Reports	 Snapsho
Home Page		F B. DRUG AND ALCOHOL US	E				
Agency		2. During the past 30 days, how	w many days	have you used	any of the follow	wing:	
✓ Client List			# of Days	RF/DK	Route		
Client Profile		a. Cocaine/Crack		Ψ.	Ψ.		
Linked Consents		b. Marijuana/Hashish		•	Ψ.		
✓ Activity List		c. Opiates:					
Intake		1. Heroin		Ψ.	Ψ.		
CONTINUUM Triage™		2. Morphine		Ŧ	Ψ.		
► ASAM		3. Diluadid		*	Ψ.		
Program Enroll		4. Demerol		v	Ψ.		
✓ GPRA		5. Percocet		•	v		
A. Record Mgmt		6. Darvon		v	Ψ.		
- B. Drug/Alcohol		7. Codeine		v	Ψ.		
Drug/Alcohol 1		8. Tylenol 2,3,4		v	•		
Drug/Alcohol 2		9. Oxycontin/Oxycodone		v	v		
Encounters		. ,					

7. Complete the required fields and click the **right-arrow** button to progress to the following screen. On the Summary screen, click **Finish** to complete the interview and return to the GPRA list screen.

Line Fox, Juniper J044788SJ884654 1	0	🖹 Generate F	Report 🖹 SSRS Report	is 👁 Snapsho
Home Page	_Г С. ғ/	AMILY AND LIVING CONDITIONS]
Agency		the past 30 days, where have you been living most of the time?		*
✓ Client List		DO NOT READ RESPONSE OPTIONS TO CLIENT.] If "Housed" Not Applicable *		
Client Profile		Other Housed (Specify)		
Linked Consents	2. H	low satisfied are you with the conditions of your living space?		T
- Activity List)uring the past 30 days, how stressful have things been for you	MISSING DATA	
Intake	b	ecause of your use of alcohol or other drugs?	MISSING DATA	
CONTINUUM Triage™		ouring the past 30 days, has your use of alcohol or other drugs aused you to reduce or give up important activities?	MISSING DATA	
▶ ASAM)uring the past 30 days, has your use of alcohol or other drugs aused you to have emotional problems?	MISSING DATA	
Program Enroll		re you currently Pregnant?		Y
▼ GPRA	7. D	o you have children?	MISSING DATA	
A. Record Mgmt	a.	How many children do you have?	Not Applicable	
B. Drug/Alcohol	b.	Are any of your children living with someone else due to a	Not Applicable	
C. Family & Living		child protection court order?		
 Encounters 		How many of your children are living with someone else due to a child protection court order?	Not Applicable	
Consent		For how many of your children have you lost parental rights? [THE CLIENT'S PARENTAL RIGHTS WERE TERMINATED.]	Not Applicable	
Referrals		[THE OLIENTS PARENTAL RIGHTS WERE TERMINATED.]		

Example : Fox, Juniper J044788SJ884654 1	0	Generate Ro	eport	SSRS Reports @	Snapsho
Home Page	_Г С. F	AMILY AND LIVING CONDITIONS			
Agency		n the past 30 days, where have you been living most of the time? DO NOT READ RESPONSE OPTIONS TO CLIENT.]	House	j	w
✓ Client List		If "Housed" Dormitory/College Residence			
Client Profile		Other Housed (Specify)			
Linked Consents	2. H	How satisfied are you with the conditions of your living space?	Neither	Satisfied nor Dissatisfied	Ŧ
		During the past 30 days, how stressful have things been for you	MISSIN	IG DATA	
Intake		because of your use of alcohol or other drugs? During the past 30 days, has your use of alcohol or other drugs		0.0474	
CONTINUUM Triage™	0	caused you to reduce or give up important activities?	MISSIN	IG DATA	
► ASAM		During the past 30 days, has your use of alcohol or other drugs caused you to have emotional problems?	MISSIN	IG DATA	
Program Enroll		Are you currently Pregnant?	No		Ŧ
✓ GPRA	7. [Do you have children?	MISSIN	IG DATA	
A. Record Mgmt	a.	How many children do you have?	Not A	pplicable	
B. Drug/Alcohol	b.	Are any of your children living with someone else due to a	Not A	pplicable	
C. Family & Living	c.	child protection court order? How many of your children are living with someone else	Not A	pplicable	
Encounters		due to a child protection court order?	NOL P	phicable	
Consent Referrals	d.	For how many of your children have you lost parental rights? [THE CLIENT'S PARENTAL RIGHTS WERE TERMINATED.]	Not A	pplicable	
Episode List					

Florida WITS Trai	ning	Provider 1, Facili	ity 1 🥒				Jones, As	hley ▼ _ = Logout
E Fox, Juniper J044788SJ884654	l 1 ©				🖹 Genera	ate Report 📔 🖹	SSRS Reports	Snapsho
Home Page	_Г D.	EDUCATION, EN	MPLOYM	ENT, AND INCOME				
 Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM 	2. 3.	[IF ÉNROLLED, Other (Specify) What is the high Are you currently STATUS DURIN DETERMINING HAD A REGULA "ENROLLED, FU) Is that find the set level of employed G MOST WHETHE WHE WHETHE	d in school or a job trainin ull time or part time? of education you have fin MISSING I MOSSING I MOSSING I MEREVIOUS WEE THERREVIOUS WEE THERREVIOUS WEE THERREVIOUS WEE THERREVIOUS WEE THERREVIOUS WEE IN D3 ASK FOR CLAR	ished, whet DATA UNG ON EK, ALL OR CLIENT IS		-	×
Program Enroll → GPRA A. Record Mgmt → B. Drug/Alcohol		OF JAIL, CODE WORK."]	D3 AS "L	ATED AND HAS NO WO INEMPLOYED, NOT LOO money did YOU receive RF/DK	OKING FOR	2	the past 30 days fror RF/DK	
C. Family & Living D. Education/Emp ▶ Encounters		a. Wages b. Public assistance	\$	MISSING DATA MISSING DATA	f. Fami friend		MISSING DA MISSING DA	TA
Consent Referrals Episode List		c. Retirement d. Disability	\$	MISSING DATA MISSING DATA	g. Othe	r (Specify) \$	MISSING DA	TA
System Administration Reports	5.	Have you enou	gh money	/ to meet your needs?			Cancel	

🥏 19.11.0		
Fox, Juniper J044788SJ884654	4 1	napsł
Home Page	E. CRIME AND CRIMINAL JUSTICE STATUS	
Agency	Times RF/DK	
 Client List 	1. In the past 30 days, how many times have you been arrested?	
Client Profile	2. In the past 30 days, how many times have you been arrested for Not Applic *	
Linked Consents	drug-related offenses?	
✓ Activity List	Nights RF/DK 3. In the past 30 days, how many nights have you spent in MISSING DATA	
Intake	Jail/prison?	
CONTINUUM Triage™	Lin the past 30 days, how many times have you committed a MISSING DATA	
► ASAM	4. crime? MISSING DATA	
Program Enroll	5. Are you currently awaiting charges, trial, or sentencing? MISSING DATA	
✓ GPRA	6. Are you currently on parole or probation? MISSING DATA	
A. Record Mgmt		
 B. Drug/Alcohol C. Family & Living 	Cancel ()	
C. Family & Living D. Education/Emp		
E. Criminal Justice		
Encounters		
Florida WITS Trai		t
Florida WITS Trai	Logou	
Florida WITS Trai	Logour 4 1 C Benerate Report SSRS Reports C S	t
Florida WITS Trai	Logour 4 1 Generate Report SSRS Reports SSRS Reports SSRS Reports A How would you rate your overall health	t
Florida WITS Trai	Logour 4 1 ♥	t
Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile	Logour 4 1 ♥	t
Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents	Logour 4 1 ♥ F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATMENT/RECOVERY 1. How would you rate your overall health 1. How would you rate your overall health 2. During the past 30 days, did you receive: a. Inpatient Treatment for: i. Physical complaint MISSING DATA Not Applicable	t
Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List	Logour 4 1 ♥ F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATMENT/RECOVERY 1. How would you rate your overall health right now? 2. During the past 30 days, did you receive: a. Inpatient Treatment for: i. Physical complaint ii. Mental or emotional difficulties MISSING DATA Not Applicable ii. Mental or emotional difficulties MISSING DATA Not Applicable	t
Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake	Logour 4 1 ♥ F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATMENT/RECOVERY 1. How would you rate your overall health 1. How would you rate your overall health 2. During the past 30 days, did you receive: a. Inpatient Treatment for: i. Physical complaint MISSING DATA Not Applicable	t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ 	Logour Logour	t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM 	4 1 Image: Construction of the second	t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll 	4 1 Image: Construction of the second	t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll → GPRA 	4 1 Image: Construction of the second	t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt 	4 1 Image: Construction of the second	t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol 		t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt 	4 1 Image: Construction of the second	t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol C. Family & Living 	4 1 Image: Construction of the second	t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol C. Family & Living D. Education/Emp 	4 1 Image: Construction of the second	t
 Florida WITS Trai 19.11.0 Fox, Juniper J044788SJ884654 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol C. Family & Living D. Education/Emp E. Criminal Justice 	4 1 Image: Construction of the second	t

19.11.0	aining	Provider 1, Facility 1 🎤	Jones, Ashley ▼ Logout
Social States And Stat	654 1 🛛 🛛	🖹 Generate Rep	port 🖹 SSRS Reports 👁 Snapsh
Home Page	⊢ F. ME	NTAL AND PHYSICAL HEALTH PROBLEMS AND TREATMENT/RE	ECOVERY
Agency	3. Du	uring the past 30 days, did you engage in sexual activity?	v.
✓ Client List		together, how many:	Contacts RF/DK
Client Profile		Sexual contacts (vaginal, oral, or anal) did you have?	Not Applicable v
Linked Consents	b.	Unprotected sexual contacts did you have?	Not Applicable 🔻
→ Activity List	4. Ha	ave you ever been tested for HIV?	Not applicable
Intake	a.	Do you know the results of your HIV testing?	Not Applicable
CONTINUUM Triage™	5. Ho	ow would you rate your quality of life?	•
▶ ASAM	6. Ho	ow satisfied are you with your health?	MISSING DATA
Program Enroll	7. Do	you have enough energy for everyday life?	MISSING DATA
- GPRA	8. Ho	ow satisfied are you with your ability to perform your daily activities?	MISSING DATA
A. Record Mgmt		ow satisfied are you with yourself?	MISSING DATA
B. Drug/Alcohol			
C. Family & Living			
D. Education/Emp			Cancel ()
E. Criminal Justice			
▼ F. Problems & TX			
Treatment 1			
Treatment 2			
Encounters			
Florida WITS Tr	aining	Provider 1, Facility 1 🥒	Jones, Ashley 🕶 Logout
Florida WITS Tr	- I.		Logout
	- I.	Provider 1, Facility 1 ₽	Logout
Florida WITS Tr	- I.		oort 🖹 SSRS Reports 👁 Snapsh
Florida WITS Tr 19.11.0	- I.	li Generate Rep	oont B SSRS Reports S Snapsh MENT/RECOVERY
Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency	- I.	F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, h	Logout bort 🖻 SSRS Reports 👁 Snapsh MENT/RECOVERY how many days have you: Days RF/DK
Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, h a. Experienced serious depression	Approximate and the second se
Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client List	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, H a. Experienced serious depression b. Experienced serious anxiety or tension	Logout port ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA
Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client List Client Profile	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, h a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA
Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client List Client Profile Linked Consents	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or	Logout port ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA
Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client List Client Profile Linked Consents Activity List	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, h a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA
Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client List Client Profile Linked Consents Activity List Intake	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ 	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM 	- I.	 Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, h a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide 	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll 	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional problem 11. How much have you been bothered by these psychological	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll < GPRA 	- I.	 Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, h a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional problem 	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ884 Home Page Agency Client Page Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt 	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional problem 11. How much have you been bothered by these psychological	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ8844 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol 	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional problem 11. How much have you been bothered by these psychological	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ8844 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol C. Family & Living 	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional problem 11. How much have you been bothered by these psychological	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ8844 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol C. Family & Living D. Education/Emp 	- I.	Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional problem 11. How much have you been bothered by these psychological	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ8844 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol C. Family & Living D. Education/Emp E. Criminal Justice 		Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional problem 11. How much have you been bothered by these psychological	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ8844 Home Page Agency Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol C. Family & Living D. Education/Emp E. Criminal Justice F. Problems & TX 		Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional problem 11. How much have you been bothered by these psychological	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA
 Florida WITS Tr 19.11.0 Fox, Juniper J044788SJ8844 Home Page Agency Client List Client Profile Linked Consents Activity List Intake CONTINUUM Triage™ ASAM Program Enroll GPRA A. Record Mgmt B. Drug/Alcohol C. Family & Living D. Education/Emp E. Criminal Justice F. Problems & TX Treatment 1 		 Generate Rep F. MENTAL AND PHYSICAL HEALTH PROBLEMS AND TREATM 10. In the past 30 days, not due to your use of alcohol or drugs, t a. Experienced serious depression b. Experienced serious anxiety or tension c. Experienced hallucinations d. Experienced trouble understanding, concentrating, or remembering e. Experienced trouble controlling violent behavior f. Attempted suicide g. Been prescribed medication for psychological/emotional problem 11. How much have you been bothered by these psychological 	Logout bort ■ SSRS Reports ● Snapsh MENT/RECOVERY how many days have you: Days RF/DK MISSING DATA MISSING DATA

19.11.0				Logout
Langton State - 1044788SJ88465	54 1 🛛	🖹 Gene	rate Report 🖹 SSRS	Reports
Home Page	_Г G.	SOCIAL CONNECTEDNESS		
Agency		In the past 30 days, did you attend any voluntary self-help	Specif	y RF/DK
Client List		groups for recovery that were not affiliated with a religious or faith-based organization? [In other words, did you	how many	
 Client Profile 		participate in a non-professional, peer-operated organization that is devoted to helping individuals who have addiction	times	Not Applic *
Linked Consents		related problems such as: Alcoholics Anonymous, Narcotics Anonymous, Oxford House, Secular Organization for		Not Applic
		Sobriety, or Women for Sobriety, etc.] In the past 30 days, did you attend any religious/faith		
		affiliated recovery self-help groups?	Ŧ	Not Applic *
CONTINUUM Triage™ ▶ ASAM		In the past 30 days, did you attend meetings of organizations that support recovery other than the organizations	T	Not Applic *
Program Enroll		described above?		
✓ GPRA		In the past 30 days, did you have interaction with family and/or friends that are supportive of your recovery?	MISSING DATA	
A. Record Mgmt	5.	To whom do you turn when you are having trouble?	MISSING DATA	
B. Drug/Alcohol		Other (Specify):		
C. Family & Living	6.	How satisfied are you with your personal relationships?	MISSING DATA	
D. Education/Emp		· · · · · · · · · · · · · · · · · · ·	MISSING DATA	
E. Criminal Justice				
F. Problems & TX			C	
G. Social Connect				
Encounters				
Florida WITS Trai	ning F	Provider 1, Facility 1 🖋		Jones, Ashley - = Logout
👗 Fox, Juniper J044788SJ884654	1 0	 ₽ Ger	nerate Report 📔 🖹 SSRS	Reports @ Snapshot
Home Page	_∟ L. Supple	MENTAL QUESTIONS		
Agency	1. Was this	s individual receiving MAT services funded by another funding sou	urce v	
Client List	(Ex: and	other grant: STR, Block, etc.) previous to enrollment in State Opio se (SOR) funding?		
Client Profile		· · · ·		
Linked Consents	Was	the individual previously enrolled in STR funding?	Not Applicable 🔹 👻	

Home Page	L. SUPPLEMENTAL QUESTIONS			
▶ Agency	1. Was this individual receiving MAT services funded by another funding source	v		
✓ Client List	(Ex: another grant: STR, Block, etc.) previous to enrollment in State Opioid Response (SOR) funding?			
 Client Profile Linked Consents 	Was the individual previously enrolled in STR funding?	Not Applicable v		
✓ Activity List Intake	Date of Enrollment in STR funded services? 2. What Medication-Assisted Treatment (MAT) are you receiving at the time of		#	v
CONTINUUM Triage™ ► ASAM	this interview? 3. In your lifetime, how many non-fatal opioid overdoses have you	#	RF	
Program Enroll	experienced? (IF ZERO OVERDOSES, ENTER 0) ④ 4. In the past 30 days, how many a non-fatal opioid overdoses have you	#	RF Not Applicable	v
A. Record Mgmt B. Drug/Alcohol	experienced? (IF ZERO OVERDOSES, ENTER 0) ④ For your last overdose, were you administered Naloxone (Narcan)?	Not Applicable v		
C. Family & Living	For your last overdose, was a 911/ambulance/emergency services/fire & rescue called?	Not Applicable *		
D. Education/Emp E. Criminal Justice	For your last overdose, did you receive medical treatment in a hospital (emergency room or general admission)? 5. Do you always carry naloxone to administer in case of an Opioid overdose?	Not Applicable v		
 F. Problems & TX G. Social Connect 	6. Have you been offered Naloxone by your MAT provider?	Y		
L. Supplemental Questions			Cancel	
Encounters			Caller	1

	groups for recovery or faith-based organ participate in a non-	did you attend any voluntary self-help that were not affiliated with a religious nization? [In other words, did you professional, peer-operated organization alping individuals who have addiction			Speci how many times	.,	RF/DK		
	related problems su	ch as: Alcoholics Anonymous, Narcotics I House, Secular Organization for	No			Not App	licable		
	In the past 30 days, affiliated recovery s	did you attend any religious/faith elf-help groups?	No			Not App	olicable		
3.	In the past 30 days,	did you attend meetings of organizations ry other than the organizations	Yes		2				
4.		did you have interaction with family re supportive of your recovery?	MISSI	NG DATA					
5.	To whom do you tur	n when you are having trouble?	MISSI	NG DATA					
	Other (Specify):								
6.	How satisfied are yo	ou with your personal relationships?	MISSI	NG DATA					
	SUPPLEMENTAL Q Was this individual r	UESTIONS	funding	Yes			-		
1.	Was this individual r	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr		Yes					
1.	Was this individual r source (Ex: another State Opioid Respon	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr	ment in						
1.	Was this individual r source (Ex: another State Opioid Respo Was the individu	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr nse (SOR) funding?	ment in	Yes No					
2.	Was this individual r source (Ex: another State Opioid Respo Was the individu Date of Enrollme	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr nse (SOR) funding? al previously enrolled in STR funding? nt in STR funded services? sisted Treatment (MAT) are you receiving	ment in			ombo (Sub	poxone)		
1. 2. 3.	Was this individual r source (Ex: another State Opioid Respon Was the individu Date of Enrollme What Medication-As time of this interview In your lifetime, how	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr nse (SOR) funding? al previously enrolled in STR funding? nt in STR funded services? sisted Treatment (MAT) are you receiving ? many non-fatal opioid overdoses have you	ment in at the	No	hine-Co #	ombo (Sub	poxone)	RF	
1. 2. 3.	Was this individual r source (Ex: another State Opioid Respon Was the individu Date of Enrollme What Medication-As time of this interview In your lifetime, how	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr nse (SOR) funding? al previously enrolled in STR funding? nt in STR funded services? sisted Treatment (MAT) are you receiving ?	ment in at the	No		mbo (Sub	poxone)	RF	
1. 2. 3.	Was this individual r source (Ex: another State Opioid Respon Was the individu Date of Enrollme What Medication-As time of this interview In your lifetime, how experienced? (IF ZE In the past 30 days,	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr nse (SOR) funding? al previously enrolled in STR funding? nt in STR funded services? sisted Treatment (MAT) are you receiving ? many non-fatal opioid overdoses have you	ment in at the u	No	#	mbo (Sub	poxone)		
1. 2. 3.	Was this individual r source (Ex: another State Opioid Respon Was the individu Date of Enrollme What Medication-As time of this interview In your lifetime, how experienced? (IF ZE In the past 30 days, experienced? (IF ZE	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr nse (SOR) funding? al previously enrolled in STR funding? nt in STR funded services? sisted Treatment (MAT) are you receiving ? many non-fatal opioid overdoses have you RO OVERDOSES, ENTER 0) how many a non-fatal opioid overdoses have	nent in at the u ave you	No Buprenorp 1	#	mbo (Sub	poxone)		
1. 2. 3.	Was this individual r source (Ex: another State Opioid Respon Was the individu Date of Enrollme What Medication-As time of this interview In your lifetime, how experienced? (IF ZE In the past 30 days, experienced? (IF ZE For your last ove (Narcan)?	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr nse (SOR) funding? al previously enrolled in STR funding? nt in STR funded services? sisted Treatment (MAT) are you receiving ? many non-fatal opioid overdoses have you RO OVERDOSES, ENTER 0) how many a non-fatal opioid overdoses have RO OVERDOSES, ENTER 0) rdose, were you administered Naloxone rdose, was a 911/ambulance/emergency	at the u ave you	No Buprenorp 1	#	mbo (Sub	poxone)		
1. 2. 3.	Was this individual r source (Ex: another State Opioid Respon Was the individu Date of Enrollme What Medication-As time of this interview In your lifetime, how experienced? (IF ZE In the past 30 days, experienced? (IF ZE For your last ove (Narcan)? For your last ove services/fire & re For your last ove	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr nse (SOR) funding? al previously enrolled in STR funding? nt in STR funded services? sisted Treatment (MAT) are you receiving ? many non-fatal opioid overdoses have you RO OVERDOSES, ENTER 0) how many a non-fatal opioid overdoses have RO OVERDOSES, ENTER 0) rdose, were you administered Naloxone rdose, was a 911/ambulance/emergency	at the u ave you	No Buprenorp 1 1 Yes	#	mbo (Sut	poxone)		
1. 2. 3. 4.	Was this individual r source (Ex: another State Opioid Respon Was the individu Date of Enrollme What Medication-As time of this interview In your lifetime, how experienced? (IF ZE In the past 30 days, experienced? (IF ZE For your last ove (Narcan)? For your last ove services/fire & re For your last ove hospital (emerge	eceiving MAT services funded by another f grant: STR, Block, etc.) previous to enrollr nse (SOR) funding? al previously enrolled in STR funding? nt in STR funded services? sisted Treatment (MAT) are you receiving ? many non-fatal opioid overdoses have you RO OVERDOSES, ENTER 0) how many a non-fatal opioid overdoses ha RO OVERDOSES, ENTER 0) rdose, were you administered Naloxone rdose, was a 911/ambulance/emergency scue called?	nent in at the u ave you	No Buprenorp 1 1 Yes Yes	#	ombo (Sub	poxone)		

6-Month Post-Discharge Interview

The 6-Month Post-Discharge Interview should be added 6 months after a client's GPRA Discharge Interview Date and after a 3-month post-discharge record has been completed. To add a 6-month post-discharge record, follow the steps below.

Note: If the 6-month post-discharge interview has been conducted, **sections B through G** and the Supplemental Questions must be completed.

If the 6-month post-discharge interview has *not* been conducted, section A must be completed.

- 1. To access the GPRA interview, select a client from the **Client List**, point to the pencil icon in the Actions column, and then click **Activity List**.
- 2. On the left menu, click **GPRA**.
- 3. On the GPRA List screen, click Add GPRA 6-Month Post Discharge.

Home Page Add GPRA Intake Add GPRA Followup Add GPRA Discharge Add GPRA 3 month Post Discharge Add GPRA 6 month Post Discharge Add GPRA 6 month Post Discharge Agency Action Interview Type Interview Date Record Status Client List 3-Month Post Discharge Treatment Client Completed Client Profile Intake Treatment Client 1/3/2019 Completed Activity List Intake Completed Completed Completed Discharge Discharge Treatment Client 6/1/2019 Completed Discharge Discharge Treatment Client 6/1/2019 Discharge Discharge Treatment Client 6/14/2019	Langton State - 10447885J884	4654 1	0			SSRS Reports Snapshot
Client List Martine Client Treatment Client Completed · Client List · Client Consents · Activity List Intake · Client Follow Up Treatment Client ///////////////////////////////	Home Page	Add	GPRA Intake Add GPRA Followup	Add GPRA Discharge Add	GPRA 3 month Post Discharge	Add GPRA 6 month Post Discharge
• Client Profile Linked Consents Intake Treatment Client 1/3/2019 Completed • Activity List Intake • G-Month Follow Up Treatment Client 6/7/2019 Completed • Discharge Treatment Client 6/1/2019 Completed	Agency	Action	Interview Type	Client type	Interview Date	Record Status
Linked Consents Intake Integration Integration <thintegration< th=""> <thintegration< th=""> <thintegrat< th=""><th>✓ Client List</th><th><i>.</i></th><th>3-Month Post Discharge</th><th>Treatment Client</th><th></th><th>Completed</th></thintegrat<></thintegration<></thintegration<>	✓ Client List	<i>.</i>	3-Month Post Discharge	Treatment Client		Completed
Activity List 6-Month Follow Up Treatment Client 6/7/2019 Completed Intake Discharge Treatment Client 6/14/2019 Completed		ø	Intake	Treatment Client	1/3/2019	Completed
		ø	6-Month Follow Up	Treatment Client	6/7/2019	Completed
		ø	Discharge	Treatment Client	6/14/2019	Completed
▶ ASAM						

Figure 6-3: GPRA list, Add GPRA 6-Month Post Discharge link

4. The system will display a confirmation screen stating, "You are about to enter a 6-month post-discharge record for this client. Would you like to continue?" Select **Yes** to start the 6-month post-discharge interview.

Florida WITS Tr	aining	Provider 1, Facility 1 🖋	Jones, Ashley - Logout
Example 7 Fox, Juniper J044788SJ8844	654 1 🛛 🛛		🖹 SSRS Reports 📔 👁 Snapshot
Home Page	You are abo	out to enter a 6-month post-discharge record for this clier	nt. Would vou like to continue?
► Agency			,
✓ Client List	Yes N		
 Client Profile 			

Figure 6-4: 6-Month Post-Discharge Interview Confirmation Screen

- 5. When the interview opens to section A. Record Management, complete the required fields and click the **right-arrow** button to progress to the next screen.
- 6. If the post-discharge interview was conducted (answered "**Yes**" to the question "Did you conduct an interview?"), clicking the right-arrow button from the Record Management screen will display section B. Drug and Alcohol Use where questions 1.a.-1.d. are read-only.
- 7. Complete the required fields and click the **right-arrow** button to progress to the following screen. On the Summary screen, click **Finish** to complete the interview and return to the GPRA list screen.

Interview Was Not Conducted

If the 6-Month Post-Discharge interview was not conducted (answered "**No**" to the question "Did you conduct an interview?"), clicking the right-arrow button will display the Summary screen. The Summary screen will only contain the section "A. RECORD MANAGEMENT" details. Note the Supplemental Questions are not available.

Florida WITS Tra		rovider 1, Facility 1 🅒	Jones, Ashley ▼ Logout	■
🛔 Fox, Juniper J044788SJ884654 1 🛛 🔾			🖹 Generate Report 📔 SSRS Reports 📔 👁 Snaps	hot
Home Page	A. RECO	ORD MANAGEMENT		7
Agency		Unique Client Nur	umber J044788SJ884654	
✓ Client List			ant ID TI081695	
 Client Profile 			t Type Treatment Client	
Linked Consents			7 Type 6-Month Post Discha	
		Did you conduct an interv		
Intake		Interview		
CONTINUUM Triage™		Program Enrolli	Ilment Facility 1/State Opioid Response (SOR) : 1/3/2019 -	
► ASAM		Created E	Data	
Program Enroll		Created		
▼ GPRA			,	
A. Record Mgmt		Updated E		
Encounters		Updated		
Consent		Upload Ac		
Referrals		Upload St		
Episode List		Number of Upload Er		
 System Administration 		Upload E		
Reports		Response [Date:	
			Cancel	

Click Finish to complete the post-discharge interview and return to the GPRA list screen.

🆀 Fox, Juniper J044788SJ884654 1	0	🖹 Generate Report 📔 SSRS Reports 📔 👁 Snapshot
Home Page	⊢ A. R	ECORD MANAGEMENT
Agency		Unique Client Number J044788SJ884654
✓ Client List		Contract/Grant ID TI081695
Client Profile		Client Type Treatment Client
Linked Consents		Interview Type 6-Month Post Discha
✓ Activity List		Did you conduct an interview? No
Intake		Interview Date mm/dd/yyyy
CONTINUUM Triage™		Program Enrollment Facility 1/State Opioid Response (SOR) : 1/3/2019 -
▶ ASAM		
Program Enroll		Created Date:
- GPRA		Created By:
A. Record Mgmt		Updated Date:
Summary		Updated By:
Encounters		Upload Action:
Consent		Upload Status:
Referrals		Number of Upload Errors:
Episode List		Upload Date:
 System Administration 		Response Date:
Reports	L	

Part 7: Consent and Referrals

Create Client Consent Record



Where: Client List > Activity List > Consent

The consent is a formal process adhering to 42 CFR Part 2, which governs the sharing of client information between agencies and facilities using WITS. A consent may also be used to record the sharing of information (on paper) with agencies who do not use WITS, making the consent part of the electronic health record.

- 1. On the left menu, click **Client List** and search for a client.
- 2. Locate the client, hover over the Actions column, and then click Activity List.
- 3. On the left menu, click **Consent**.
- 4. Click the Add New Client Consent Record link.

Fox, Juniper F2001012009265	50 1	0			 Snapshot
Home Page	Clier	t Consent List	_	Add Ne	w Client Consent Record
Agency	Actions	Start Date	Disclosed To	Status	Signed?
Clinical Dashboard					
✓ Client List					

5. Select No.

Is this	related	to a waitlist record?
Yes	No	-

6. On the Client Disclosure Agreement screen, complete the following fields.

Table 7-1: Client Disclosure Agreement fields

Field	Description
Entities with Disclosure Agreements	Select from the drop-down list. This field will display a list of agencies that have previously created a Disclosure template. This will prepopulate fields in the "Client Information To Be Consented" section, which can then be modified if needed.
System Agency	Select "Yes" if the agency uses WITS.
Disclosed to Agency	Select the agency that will be receiving the client's information.
Facility	Select the facility within the selected Agency that will be receiving the client's information. Select All Facilities, or an individual facility.
Purpose for Disclosure	Type the reason for creating the Consent record.
Earliest date of services to be consented	Select the date.
Has the client signed the paper agreement form	Select "No" to save the screen and have the client sign the paper form (see below), after client has signed, select "Yes".

Field	Description				
Date client signed consent	This field will become editable when "Yes" is selected in the previous field.				
Client Disclosure Agreement					
Note: Consented information may not be redisclosed. Client Name: poppins, mary					
Unique Client Number: P15206017665430					
Disclosed From Agency: Administrative Agency					
Entities with Disclosure Agreements	v				
System Agency Yes 👻					
Disclosed To Agency A & O RECOVERY SERVICES IN	VC Facility All Facilities				
Disclosed To Entity (Non System Agency)					
Purpose for disclosure Client's level of care has changed	and needs to receive				
Earliest date of services to be consented 6/1/2017					
Has the client signed the paper No v Date client signed conse agreement form	ent				
Client Information To Be Consented					
Expiration Type Discharge(UD) + Days					
*Expiration type is required for disclosure activities.					
Client Information Options Admission ASAM ATR Eligibility Screen Behavioral Health Assessment CAGE-AID Screening CONTINUUM Triage TM Assessment CONTINUUM TM DENS ASI Assessment DENS ASI Lite Disclosure Selection Client Information (Pro Client Screening (UD, Consent (UD, +30) Intake Transaction (UD TAP Assessment (UD, Construction (UD, +30) Intake Transaction (UD, +30) Intake Transaction (UD, +30) Intake Transaction (UD, +30) APA Assessment (UD, +30) Intake Transaction (UD, +30) Intake Tr	+30) 0, +30)				
Comments Other Disclosur	Cancel Save Finish				

Figure 7-1: Client Disclosure Agreement screen

7. If additional consent information needs to be added or removed from the client's disclosure agreement, update the options from the "Client Information To Be Consented" section. Your agency administrator may have set up templates for the disclosure agreement.

Table 7-2: Client Information To Be Consented fields

Field	Description
Expiration Type and + Days	Select either "Discharge (UD)" or "Date Signed (DS)", then when the yellow field appears, enter the number of days the consent will expire.
Client Information Options/Disclosure Selection	Select options from the box and use the mover buttons to add or remove the desired consent options.

8. When all required fields are complete, click **Save**.

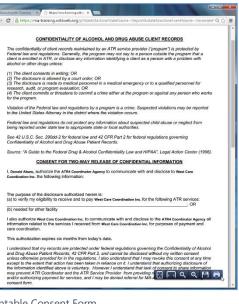
Print the Client Consent Form

9. After saving the Client Disclosure Agreement screen, click the Generate Report link to print the Client Consent Form to get the client's signature on the paper copy. The printed consent form includes items from the Client Information Options box along with the Consent Expires information.

Ex. Juniper F2001012009265) 1 • Generate Report • Snapshot			
Home Page	Client Disclosure Agreement			
► Agency	Note: Consented information may not be redisclosed.			
Clinical Dashboard	Client Name: Fox, Juniper			
	Unique Client Number: F20010120092650			
 Client List 	Disclosed From Agency: Community Counseling Center of Mercer County			
Client Profile	Entities with Disclosure Agreements All Other Agencies			
Linked Consents	System Agency Yes 👻	_		
Non-Episode Contact	Disclosed To Agency Administrative Agency v Facility Administrative Unit v			
- Activity List	Disclosed To Entity (Non System Agency)			
Intake	Purpose for disclosure Client's level of care has changed and needs services fr			

Figure 7-2: Client Disclosure Agreement screen, Generate Report

- 10. Once the client has signed the paper form, update these fields:
 - Has client signed the paper agreement form: select "Yes"
 - Date client signed consent: defaults to current date
- 11. Click Save and stay on this screen (notice the fields are now grayed out).
- 12. After saving the client consent, a link to add a Client Referral for this consent will be available. This will open the client referral screen, and will pre-populate the signed consent and Agency fields of the Referred to section.
- 13. Click the link, Create Referral Using this Disclosure Agreement, and continue to the next section.



Printable Consent Form

Ex. Juniper F200101200926	650 1 🛛 🛛		🖹 Generate Report 📔 👁 Snapshot
Home Page	Client Disclosure Agreement	_	Create Referral Using this Disclosure Agreement
Agency	Note: Consented information may not t	be redisclosed.	
Clinical Dashboard	Client Name:		
✓ Client List	Unique Client Number: A Disclosed From Agency: C	F20010120092650 ommunity Counseling Center of Mercer County	
Client Profile	Entities with Disclosure Agreements	All Other Agencies	
Linked Consents	System Agency	Yes	
Non-Episode Contact	Disclosed To Agency	Administrative Agency	Facility Administrative Unit
	Disclosed To Entity (Non System Agency)		
Intake	Purpose for disclosure	Client's level of care has changed and needs services fr	



Referrals

Create a Client Referral



Where: Client List > Activity List > Referrals

Continuing from previous section...

Once the Client Consent is complete, create the Client Referral Record. A referral is used when the receiving agency (another WITS agency) will be providing services for the client. Referrals may also be done from one facility to another facility within the same agency.

14. After clicking the Create Referral Using this Disclosure Agreement link, the Referral screen will open.

Referral			
Referred By		Referred To	
Agency	Administrative Agency	Signed Consents	ALCOHOL AND DRUG ABUSE SERVICES
Facility	Administrative Unit	Agency	ALCOHOL AND DRUG ABUSE SERVICES
Staff Member	Jones, Ashley	Facility	CHESTNUT ST-A&D ABUSE SRVCS
Program		Staff Member	v
State Reporting Category		Program	v.
Reason		State Reporting Category	
If Other		Non-System Agency	
Is Consent Verification Required?	w.	Non-System Modality	
Is Consent Verified?	*	Non-System Specifier	
Continue This Episode of Care?	No	Appt Date	Undetermined
Comments		Consents Granted Consent Date:6/30/2017 Disclosure Domains: Admission (UD, +30) ASAM (UD, +30) Client Information (Profil	e) (UD, +30)
Referral Status Referra	I Created/Pending	Client Screening (UD, +: Intake Transaction (UD,	
Projected End Date	ť	¥	
Created Date 7/24/2017	2:20 PM	Cancel	Save Finish



15. On the Client Referral screen, complete the required fields in the Referred By section, including:

Table 7-3: Referred By fields

Field	Description
Program	Select the Program It should be a referral from a program with the SOR grant to another program with the SOR grant
Reason	In the drop-down field, select the reason why this client is being referred.
Is Consent Verification Required?	Select Yes.
Is Consent Verified?	Select Yes.
Continue Episode of Care?	Select No.
Referral Status	State of the referral (this should be "Referral Created/Pending").

Field	Description
Created Date	Date client is referred.

16. Next, in the **Referred To** section, complete all the required fields, including:

Table 7-4: Referred To fields

Field	Description
Signed Consents	Select the consent from list of available consents.
Agency	This field will auto populate based on the "Consent" selected.
Facility	The facility the client is being referred to.
Program	The program the client is being referred to. It should be an SOR program.

17. When complete, click Save.

Viewing Referrals

Referrals In

Where: Agency > Agency List > Referrals > Referrals In

Whenever clients are referred in to your Agency from another agency, a message will appear on the Home Page as shown in Figure 7-5: Home Page with "referred in" notification. Clients who have been referred in have signed a consent form agreeing to share certain information with your agency. To review these referrals, follow the steps below.

Role Needed:

- Referrals (Full Access)
- **Note**: Only users with the Referrals (Full Access) role will see Referrals left menu link.

STANDARD W	Jones, Ashley; Ac	Iministrator - Logou	, Ξ					
				· @ S	Snapshot			
Home Page	0	There are currently 2 people that have been referred in.			×			
Agency		Home						
Clinical Dashboard	Hom							
Client List	Ann	puncements						
 System Administration 	Action	s <u>Summary</u>	Posted Date	Start Date	Priority			
Reports	ø	This is an announcement which should be scoped to Mental Health agencies.	1/24/2017 1:58 PM	1/24/2017	N			

Figure 7-5: Home Page with "referred in" notification

- 1. On the left menu, click Agency, click Referrals, and then click Referrals In.
- 2. On the **Referrals In Search** screen, in the **Referral Status Codes** field, select "**Referral Created/Pending**" and move this option to the **Search Criteria** box by clicking the mover button as shown in **Error! Reference source not found.**
- 3. After selecting the search criteria, click **Go** to view the search results list.

	ITS User Documentation Agency - Provider, User Documentation Facility / Jones, Ashley - Logout
	🕢 🕢 Help Resources 🔰 🖹 SSRS Reports 📔 👁 Snapshot
Home Page	Referrals In Search
State Waitlist	Referral Status Codes Search Criteria
- Agency	Placed/Accepted Referral Created/Pending
 Agency List 	Refused Treatment
Agency Profile	Rejected by Program
Aliases	Unique Client Number Created Date Referred Date
Contacts	First Name Last Name
 Governance 	Clear Go
Relationships	
Announcements	Referrals for User Documentation Facility (Export
	Actions Unique Client # Client Name DOB Created Date Referring Agency/Facility Referred To Modality Referral Status Ref to Facility Referral Comments
Referrals Out	
Removed Consents	
Deleted Clients	

Figure 7-6: Referrals In Search screen

4. Notice that any referred clients will appear in the list portion of the screen. To view a client's referral information, hover over the Actions column, and then click **Review**.

Refe	Referrals for User Documentation Facility							<u>(Export)</u>	
Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	<u>Referral</u> Comments
Ø	F919895OH605120	Houlihan, Margaret	9/21/1958	6/19/2017	Administrative Agency/Administrative Unit	Ambulatory- Non-Intensive Outpatient	Referral Created/Pending	User Documentation Facility	
ø	Review 10	Barb, Jon	1/14/1968	6/19/2017	Administrative Agency/Administrative Unit	Ambulatory- Non-Intensive Outpatient	Referral Created/Pending	User Documentation Facility	

Figure 7-7: Referrals Search Results, Review link

5. To accept the client referral, click on the **Referral Status** field and select "**Placed/Accepted**" from the drop-down list. The client must be accepted into your agency before viewing the client's record, or working on the case.

& Houlihan, Margaret F919895C	H605120 O				 Snapshot
Home Page	Referral				
✓ Agency					
- Agency List	- Referred By			- Referred To	
 Agency Profile 	Agency	Administrative Agency		Signed Consents	User Documentation Agency
Aliases	Facility	Administrative Unit		Agency	User Documentation Agency
Contacts	Staff Member	Jones, Ashley; Prevention Specialist		Facility	User Documentation Facility
 Governance 	Program	Administrative Unit/second teds : 5/23/2017 -		Staff Member	
Relationships	State Reporting Category	Adult outpatient		Program	Adult Outpatient Counseling Services (-202)
Announcements	Reason	Service not available at this facility		State Reporting Category	
- Referrals	If Other			Non-System Agency	
✓ Referrals In	Is Consent Verification Required?	Yes		Non-System Modality	
Referrals Out	Is Consent Verified?			Non-System Specifier	
Deleted Clients	Continue This Episode of Care?	No		Appt Date	Undetermined 👻
Facility List				Consents Granted	
Staff Members	Comments			Consent Date:6/1/2017 Disclosure Domains:	A
Tx Team Groups				Admission (UD, +60) DENS ASI Lite (UD, +60	1)
Alerts Configuration			11	DENS ASI Assessment ASAM (UD, +60)	
Clinical Dashboard	Referral Status Placed	/Accepted		ATR Eligibility Screen (L	JD, +60)
Client List	Projected End Date		Q,		
 System Administration 	Created Date 1 Place	d/Accepted		c	Cancel Finish
Reports	Referr	al Created/Pending			
Керопз	Referr	al Terminated			
	Refus	ed Treatment			
	Reject	ted by Program			
	Wait L	ist			

Figure 7-8: Referral screen, Referral Status field

- 6. (Optional) Next, fill in the **Appointment Date (Appt Date)** and use the drop down box to provide any additional information about the appointment.
- 7. Click **Finish** to save the record and accept the referral. Note that this action takes you to the Client Profile screen for the client you just accepted.

(Optional) Additional Referral Status reasons to select:

- **Referred/Terminated**: When the referral has been deleted by the referring agency.
- Refused Treatment: Select if the client does not want to be treated.
- Rejected by Program: If the client is not eligible or is not acting in compliance.
- Wait List: If the client is waiting for a slot to open in the program.
- **Note**: Once the referral is Placed/Accepted, the client record is created within the Agency, and an Intake and Client Program Enrollment is created within the referred to Facility.

Referrals Out

Where: Agency > Agency List > Referrals > Referrals Out

The Referrals Out screen is used to check the status of referrals made from your agency to other agencies.

- 8. On the left menu, click Agency, click Referrals, and then click Referrals Out.
- 9. On the **Referrals Out Search** screen, in the **Referral Status Codes** field, select the desired codes and move them to the **Search Criteria** box by clicking the mover button (>).
- 10. After selecting the search criteria, click **Go** to view the search results list.

Home Page	Refe	rrals O	ut Search						
 State Waitlist 	Referral S				Search Criteria				
✓ Agency	Placed/A Referral		d I/Pending		>		•		
✓ Agency List	Referral Refused				<		-		
 Agency Profile 	rioladea	mouth							
Aliases	Unique Cli	ient Nun	iber		Created Date		Referred Date		
Contacts	First Name	е			Last Name				
 Governance 						Clear Go			
 Relationships 									
Announcements	Refer	rrals fr	om Contracte	or					<u>(Export)</u>
✓ Referrals	Actions	<u>Name</u>	Created Date	Referral Status	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Comments
Referrals In									
Referrals Out									
Removed Consents									

Figure 7-9: Referrals Out screen

Viewing Consented Information <u>Before</u> a Referral is Accepted



Where: Client List Screen

When a Client Consent is completed from one agency to another within WITS, the specific client information contained within that Consent record will be available for the receiving agency to view as read-only.

Role Needed:

- View Consented Clients
- **Note**: Once the receiving agency accepts the Referral, the consented information no longer appears within the Clients with Consents from Outsides Agencies list. The consented information can be located directly within the Client Record Linked Consents.

	it List (Export)							
Actions	Unique Client #		Eull Name		DOB		SSN	Gender
d'	J304566FE574664		Abrams, Shayna		9/26/2001		123-32-3212	Female
Can's	Q913169QE751544		America, Captain		5/7/1977		789-45-1235	Male
ø	J554434TE424644		apple, stephanie		1/1/2000		545-67-8900	Female
de la	Q553420IF131544		Bee, Honey		1/1/1970		X34-98-9876	Male
ø	Q033433MF332554		Bing, Chandler		6/19/1980		999-99-9999	Male
	J094313MF205664		Bird, Tweetee		6/25/2019		123-45-6789	Female
							1	
The second se	nts with Consents from O		>					
Actions	Agency	Unique Cli		Client Name		DOB	\$5N	Gender
The second se				<u>Client Name</u> Andrews, Annie		DOB 11/25/1968	<u>55N</u> 555-45-7894	Gender Female
Actions	Agency	Unique Cli	F084644	10000000000000000000000000000000000000		- The second		1 Section of the sect
Actions	Agency Provider 1	Unique Cile Q554591SF	F084644 070544	Andrews, Annie		11/25/1968	555-45-7894	Female
Actions	Agency Provider 1 Provider 1	Unique Cliv Q554591SF Q553119IF(F084644 070544 222555	Andrews, Annie bear, yogi		11/25/1968 1/1/1967	555-45-7894 456-55-3765	Female Male
Actions d [*] d [*]	Agency Provider 1 Provider 1 Provider 1	Unique Cli Q5545915F Q553119/F0 J593977/F2	F084644 070544 222555 F341544	Andrews, Annie bear, yogi Bee, Queen		11/25/1968 1/1/1967 11/15/1985	555-45-7894 456-55-3765 234-11-8383	Female Male Female

Figure 7-10: Client List Screen

- 11. On the left menu, click **Client List**.
- 12. Enter and choose any search parameters to find the client, or search all clients and click Go.
- 13. View the Clients with Consents from Outside Agencies list.

	its with Consents from Ou	
Actions	Agency	Unique Client #
1	Provider 1	Q554591SF084644
	Activity List	Q553119IF070544

Figure 7-11: Selecting the Consented Client's Activity List

14. Find the client record you wish to view, and click Activity List.

his notic onfidentiatherwise	e accompanies a disclosure of information concerning a ality rules (42 CFR Part 2). The Federal rules prohibit you	NNING CLIENT IN ALCOHOL OR DRUG ABUSE TREAT client in alcohol/drug abuse treatment, made to you with a from making any further disclosure of this information un he release of medical or other information is NOT sufficient	the consent of such client. This information has bless further disclosure is expressly permitted b	y the written consent of the person t
Actions	Activity	Activity Date	Created Date	Status
	GPRA Interview (Intake)	8/1/2019	8/30/2019	Completed
A *	CONTINUUM™	7/29/2019	7/29/2019	In Progress
	CONTINUUM™	7/29/2019	7/29/2019	In Progress
A.	CONTINUUM™	7/29/2019	7/29/2019	In Progress
de la	Client Information (Profile)	7/29/2019	7/29/2019	Completed
	Intake Transaction	7/29/2019	7/29/2019	Completed
and the second s	Consent (Provider 2)	1/1/2019	2/7/2020	Completed

Figure 7-12: Viewing the Consented Client's Activity List

- 15. Select any activity which appears on the Consented Activity List.
- 16. The read-only information will then open within a new window within your browser.

🕈 🕐 Florida WITS Training 🛛 🗙 🕐 Gpra Services 🛛 🗙 🕇	
← → ♂ ● fl-training.witsweb.org/?stateMachineStateName=GpraInterviewCo	onsentedView & stateMachineEventName = DisplaySummary & BaseSessionTheory StateSessionTheory StateSessionT
👖 Apps 📒 WITS 📙 FEI 🐞 Login Salesforce 🚺 Costpoint 🋞 My meetings GoT	📖 🧧 Project Management 🧧 FASAMS 🧧 TFS 📒 Other Bookmarks
Consented: Andrews, Annie Q554591SF084644 1 Location: Provider 1	
Spra Interviews	
ient Name: Andrews, Annie Agency: Provider 2 nique Client Number: Q554591SF084644 Facility: Facility 1	
A. RECORD MANAGEMENT	
Contract/Gra	mber Q554591SF084644 nt ID T1081695
	Type Treatment Client
Interview Did you conduct an interv	Type Intake
	Date 8/1/2019 mm/dd/yyyy
	ment Facility 1/State Opioid Response (SOR) 7/29/2019 -
Created I	Date: 8/30/2019 12:31 PM
	d By: 122, trainee
Weinstein and State Stat	Date: 8/30/2019 12:31 PM
	d By: 122, trainee
Upload Ac	
Upload St	
Number of Upload Er	
Upload I Response I	
Kashonsa t	Jaia.
A. RECORD MANAGEMENT - BEHAVIORA	
	health diagnoses using the International Classification of Diseases,
Please indicate the client's current behavioral	

Figure 7-13: Viewing the Specific Activity

Viewing Consented Information <u>After</u> a Referral is Accepted

Where: Client List Screen

When a Client Consent is completed from one agency to another within WITS, the specific client information contained within that Consent record will be available for the receiving agency to view as read-only. If the client was also referred and the referral was accepted by the receiving agency, then the consented information is still available for that client. It will be available using a menu option called "Linked Consents" which is tied directly to the client record in that agency.

Role Needed:

- View Consented Clients
- **Note**: Once the receiving agency accepts the Referral, the consented information no longer appears within the Clients with Consents from Outsides Agencies list. The consented information can be located directly within the Client Record Linked Consents.
 - 1. While in a specific client's record within WITS, you may view the Linked Consents by clicking "Linked Consents" on the navigation menu or within the hover action items from the Client List.

Home Page	Client Search					
Agency	Agency	Provider 2	Facility			
Client List	First Name		Last Name	dog		
Client Profile	SSN		DOB			
Linked Consents	Client ID		Provider Client ID			
 Activity List 	Unique Client Number		Intake Staff			
Episode List	Case Status	All Clients	*	<u></u>		
System Administration						
Reports	Client List (Exp	port)				
	Actions Unique Cile	nt#	Full Nam	e.	008	SSN
	Ø Q9144335H	334644	Dog. Coo	per	5/7/2000	669-68-5555
	J904699SH	1	Linker Consents		5/6/2001	526-88-5555

Figure 7-14: Client List Screen

2. Select the Linked Consent you wish to view. One client may have consented information coming from multiple agencies, and all will be visible within this list.

Home Page	Linke	d Client Conse	nts in Other Agencies					
Agency	Consenti	ng Agency		¥				
✓ Client List								Clear Cancel
 Client Profile Linked Consents 	Link	Linked Consent List Add L						
Activity List	Actions	Agency	Client Name	Unique Client #	DOB	SSN	Min Act. Date	Max Act. Date
Episode List	ø	Provider 1	Dog, Lola	J904699SH995644	5/6/2001	526-88-5555	12/1/2019	12/19/2019
 System Administration 								
Reports								

Figure 7-15: Linked Consent List Screen

3. Once the Linked Consent is selected, the following Consented Activity List will appear.

his notice onfidentia therwise	e accompanies a disclosure of information concerning a ality rules (42 CFR Part 2). The Federal rules prohibit yo	RNING CLIENT IN ALCOHOL OR ORUG ABUSE TREAT client in alcohol/drug abuse treatment, made to you with u from making any further disclosure of this information ur he release of medical or other information is NOT sufficient	the consent of such client. This information ha less further disclosure is expressly permitted by	y the written consent of the person to
Actions	Activity	Activity Date	Created Date	Status
	GPRA Interview (Intake)	8/1/2019	8/30/2019	Completed
A ¹	CONTINUUM™	7/29/2019	7/29/2019	In Progress
de la	CONTINUUM	7/29/2019	7/29/2019	In Progress
(a)	CONTINUUM™	7/29/2019	7/29/2019	In Progress
den .	Client Information (Profile)	7/29/2019	7/29/2019	Completed
Ø*	Intake Transaction	7/29/2019	7/29/2019	Completed
(MA)	Consent (Provider 2)	1/1/2019	2/7/2020	Completed

Figure 7-16: Consented Activity List

-

Removed Consents

Where: Agency > Agency List > Removed Consents

This screen displays clients with consents that have been removed. This is typically done if a client is no longer in treatment at your agency. To help easily manage the number of clients with consents from outside agencies on the Client List screen, users with the Clinical Supervisor role can "remove" consented clients from the list.

					SSRS R	leports	· @ Sn	apshot
Home Page	Remo	ved Consented Cli	ient Search					
 State Waitlist 	c	onsented From Agency	,	v Client ID				
✓ Agency		First Name		Last Name				
→ Agency List							Clear	Go
Agency Profile								
Aliases	Rem	oved Consented (Client List					
Contacts	Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender	
 Governance 								
Relationships								
Announcements								
Referrals								
Removed Consents								
Deleted Clients								

Figure 7-17: Removed Consents screen

Part 8: Encounters

Create Encounter Notes



Where: Client List > Activity List > Encounters

- 1. On the left menu, click **Client List** and search for a client.
- 2. Hover over the Actions column, and click Activity List.
- 3. On the left menu, click **Encounters**. This will display the Encounter Search/List screen.
- 4. To view previous encounters, complete the search fields and click Go.

5. To create a new encounter, click **Add Encounter**.

Florida WITS Tra	ining Provider 1, F	acility 1 🖋				Schnoor, Kory ▼ = Logout
Log, Cooper Q154488SH8856	644 1 🛛 😆			🖹 Ge	nerate Report 🗎 🤅	SSRS Reports
Home Page	No results match	your search criteria.				×
Agency	Encounter Search					
✓ Client List	Encounter Search					
Client Profile	Start Date	5/21/2019	End Date	5/20/2020		
Linked Consents	Rendering Staff		Service			v
	Encounter Status	v	Program			w
Intake	Allow Disclosure of Note	v				
CONTINUUM Triage™						Clear Go
► ASAM						
Program Enroll	Encounter List (Exp	<u>ort</u>)				Add Encounter
GPRA	Actions Svc Date	Service EN		endering Staff	Program Name	Status
✓ Encounters						
Profile						
Consent						
Referrals						

Figure 8-2: Encounter screen, Add Encounter

Encounter		
Note Type	e v	
ENC II		
Program Name	Facility 1/State Opioid Response (SOR) : 2/13/2019 -	
Servic	e Billable N	vo 👻
	Start Date 🛗 End Date 🛗	
Service Location	n Start Time End Time	
	Duration	
	Emergency # of Service Units/Sessions	
Preg	nant No	
l logi		
Diagnoses for this	Service	
Primary	Select an option	
Secondary	Select an option	
Tertiary	Select an option	
	-	
Rendering Sta		
Secondary Sta		
Supervising Sta	T T	
Unsigned Notes		
	Sign Note	
	Allow Disclosure of No	
Signed Notes	NOTE	
	Cancel Save Finish	

6. Complete the fields on the Encounter Profile screen. See table below for information on each field.

Figure 8-1: 1.Encounter Note

Table 8-1: Encounter Profile fields

Field	Description					
Note Type	Select from the drop-down field.					
ENC ID	Read-only field. When the encounter is saved, this field will display its unique ID number.					
Created Date	Read-only field. This field will display the date and time when the encounter is saved.					
Program Name This field will pre-populate with the client's current program enrollment nam program enrollment start date. Image: Comparison of the compar						
	Program Name Facility 1/State Opioid Response (SOR) : 2/13/2019 -					
Service	Select a service from the drop-down list.					
Billable	This field will prepopulate with No. No billing is done within FL WITS, so leave as No.					
Service Location	Select an option from the drop-down list. This field may be pre-populated if this information was added to the facility profile.					
Start Date	Enter the date when this service was rendered.					
	Note : The start date for this encounter must occur within the same program enrollment period. Encounter date cannot be before the intake date.					
Start Time	Enter the time when this service was rendered. This field may be optional or required depending on the selected service. Some services may be set up to require this information.					
End Date	 Enter the date when this service ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information. Note: The end date for this encounter must occur within the same program enrollment period. 					
End Time	Enter the time when this encounter ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information.					
Duration	In the Duration field, type an integer to record time spent for this encounter. In the Duration drop-down field, select the unit of time. Note: The duration field will only accept whole numbers. Decimals (e.g., 0.5) are not accepted. Duration 30 Duration 30 Duration Sess Days Hrs					
# of Service Units/Sessions	Min These fields may be optional or required depending on the selected service. Some services may be set up to require this information. Type an integer representing the number of units or sessions spent for this service. Your administrator may have established policy guidelines regarding how services are recorded.					
Emergency	(Optional) Select from the drop-down list.					
	(Optional) Select from the drop-down list.					
Pregnant						

Field	Description
	Diagnoses for this Service
Primary	(Optional) This field will pre-populate with the client's primary diagnosis based on the encounter start date.
Secondary	(Optional) This field will pre-populate with the client's secondary diagnosis based on the encounter start date.
Tertiary	(Optional) This field will pre-populate with the client's tertiary diagnosis based on the encounter start date.
Rendering Staff	This field will pre-populate to the user logged in. To change the rendering staff, select the correct staff member from the drop-down list. Some services may be set up to require this information.
Supervising Staff	(Optional) In the drop-down list, select the Supervisor for the Rendering Staff member, if applicable.
	Note : Declaring staff members as "supervisors" is a feature controlled through the staff member's profile by adding relationships.
Unsigned Notes / Signed Notes	This field allows the user to capture any notes about the Encounter and service delivered. Users may type notes into the Unsigned Notes box, click "Sign Note" to save the content. The Signed Notes field will save the content along with the user's information and date/time.

7. Click Save and/or Finish when done.

Part 9: Reports



Where: Reports

The Reports module includes a list of available reports, with options to view the data on screen, or export the data in to an Excel spreadsheet.

Required Role(s):

Reports Access

To view the list of reports available in the Report Catalog, follow the steps below.

- 1. On the left menu, click **Reports**. This will display the Report Catalog screen.
- 2. Locate the desired report and click the report's name. In most cases, this will open a search criteria screen.

WITS Sta 19.0.	ndard SOR QA	Provider Agency, Provider Facility 🖋		Jones, Ashley; Clinician ▼ Logout	
				· @ Snap	pshot
Llomo Dog					
Home Page	R	eport Title Contains:	Go		
Agency		Report Catalog			
Client List	Т	itle			
System Ad	ministration		Access		
Reports		Admissions: Client Demographics			
		Agency Client Movement			
		Client Demographic by Substance			
		Program Client Movement			
		Referrals in by Agency			
		Referrals out by Agency Naitlist by Agency, Facility & Program			
	7				
			QA/QC		
		Program Enrollment Counts			
	<u> </u>	Agency/Facility Client Terminations			
			Miscellaneous		
		Client Profile Data			
	<u>(</u>	Combined Note Data			
	7	VITS Data Dictionary			
		Encounter Data			
	<u>(</u>	<u>GPRA Assessment Data</u>			
	<u>(</u>	Outcome Measure Data			
			Security		
	2	Staff Role Assignment			
			Billing		
	E	Adjudication Results			
		Aging and Trial Balance			
	E	Authorized Services			
		Billing Transaction Data			
	<u>(</u>	Claims Reconciliation			

Figure 9-1: Report Catalog screen

The search criteria screen will include various fields (based on the specific report selected) to help narrow down your search results. Once any search criteria have been selected, click **On Screen**, or **Export**.

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

The **Export** function will show more information than the On Screen result. Clicking **Export** will download an Excel file containing the report data.

Standard SOR C	QA Provider A	gency, Prov	ider Facility 🖋				Jones, Ashley; Clir	nician ▼ Logout	
								👁 Snap	oshot
Home Page	Program Enro	Ilment Cour	nts						
► Agency	Observe Arres								
Client List	Choose Ager								
System Administration	Agency Provide		Ger						
Reports	Choose Mod Modality Specifie		ner		*				
	Choose a Da				*				
	choose a Da	From	То						
	Date Range	#							
	On Screen	Export	Cancel						
Standard SOR QA	Provider Agency, Pr	ovider Facility	/				Jones, Ashley;	Clinician ▼ Logout	
Standard SOR QA		ovider Facility	/				Jones, Ashley;		
19.0.0		ovider Facility	/				Jones, Ashley;	Logout	
Home Page	Provider Agency, Pr		/				Jones, Ashley;	Logout	
19.0.0 Home Page E Agency Pr Client List P	Provider Agency, Provid	unts esigned to disp	play the number of client	s that were enro	lled and dis-enroll	ed to/from all progr	ams within an agency	Logout	apshot
19.0 Home Page Agency Client List System Administration	Provider Agency, Provider Agency, Provider Agency, Provider Agency, Program Enrollment Courrose: This report is dinge Enrollment Count Cou	unts esigned to disp at End of Perio Count of clier	olay the number of client of: Unduplicated count c ts identified in Errollme	of clients active in nt Count at End	n this program on of Period who als	the end date of the o have not received	ams within an agency specified date range. services in any progr	Logout	apshot cific date eive days
19.0 0 Home Page Agency Client List System Administration Reports b	Provider Agency, Provider Agency, Provider Agency, Provider Agency, Program Enrollment Count envices in Last 60 Days fore the end date of th	unts esigned to disp at End of Peric Count of clier e specified dat	play the number of client d: Unduplicated count d	of clients active in nt Count at End e Services in La	n this program on of Period who also st 30 Days: Count	the end date of the o have not received of clients identified	ams within an agency specified date range. services in any progr	Logout	apshot cific date eive days
19.0 0 Home Page E Agency P Client List P System Administration ra Reports b	Provider Agency, Pr Export Finish rogram Enrollment Cout onge. Enrollment Count ervices in Last 60 Days efore the end date of th end ate of th so have not received sr – Report Criteria —	unts esigned to disp at End of Peric Count of clier e specified dat rvices in any p	ay the number of client d: Unduplicated count o ts identified in Errollme e range. Did Not Receiv	of clients active in nt Count at End e Services in La	n this program on of Period who also st 30 Days: Count	the end date of the o have not received of clients identified	ams within an agency specified date range. services in any progr	Logout	apshot cific date eive days
19.0 0 Home Page Agency Client List System Administration Reports b	Provider Agency, Pr Export Finish rogram Enrollment Count ervices in Last 60 Days sfore the end date of th so have not received so	unts esigned to disp at End of Peric Count of clier e specified dat rvices in any p	ay the number of client d: Unduplicated count o ts identified in Errollme e range. Did Not Receiv	of clients active in nt Count at End e Services in La	n this program on of Period who also st 30 Days: Count	the end date of the o have not received of clients identified	ams within an agency specified date range. services in any progr	Logout	apshot cific date eive days
19.0.0 Home Page E Agency Pr Client List Pr System Administration Reports b	Provider Agency, Pr Export Finish rogram Enrollment Cout onge. Enrollment Count ervices in Last 60 Days efore the end date of th end ate of th so have not received sr – Report Criteria —	unts esigned to disp at End of Peric Count of clier e specified dat rvices in any p	ay the number of client d: Unduplicated count o ts identified in Errollme e range. Did Not Receiv	of clients active in nt Count at End e Services in La	n this program on of Period who also st 30 Days: Count	the end date of the o have not received of clients identified	ams within an agency specified date range. services in any progr	Logout	apshot
19.0 J Home Page E Agency P Client List P System Administration Reports b Home Page E P P P P P P P P P P P P P	Provider Agency, Pr Export Finish rogram Enrollment Cout onge. Enrollment Count ervices in Last 60 Days efore the end date of th end ate of th so have not received sr – Report Criteria —	unts esigned to disp at End of Peric Count of clier e specified dat rvices in any p	play the number of client of: Unduplicated count or tis identified in Errollme e range. Did Not Receiv orogram in the 30 days b	of clients active in nt Count at End e Services in La: before the end da Newly_	n this program on of Period who als st 30 Days: Count ate of the specified	the end date of the b have not received of clients identified d date range.	ams within an agency • specified date range. d services in any progr in Enroliment Count a	Logout Sna within a spec Did Not Reca am in the 60 at End of Peri	apshot cific date eive days iod who
19.0 0 Home Page Agency Client List System Administration Reports	Provider Agency, Pr Export Finish rogram Enrollment Co urpose: This report is d urpose: This report is d urpose: This report is d urpose: This report is d so have not received ss – Report Criteria — Agency: Provider Age Program	unts signed to disp at End of Peric Sepecified dat rvices in any p ncy <u>Facility</u>	blay the number of client of: Unduplicated count of ts identified in Enrollme e range. Did Not Receiv orogram in the 30 days b Enrolled Prior to This Period and	of clients active in the Count at End e Services in La- before the end da <u>Newly_</u> <u>Enrolled</u> <u>This_</u>	n this program on of Period who als st 30 Days: Count ate of the specified <u>Enrollments</u> <u>Ended This</u>	the end date of the b have not received of clients identified d date range.	ams within an agency specified date range. d services in any progr d in Enrollment Count a <u>Did Not Receive.</u> Services in Last	Logout Sna within a spec Did Not Rece am in the 60 at End of Peri Did Not R Services i	apshot cific date eive days iod who eccive

3. After viewing the results on screen, or from an exported file, click **Finish**.

Part 10: ASAM Assessments



Where: Client List > Activity List

ASAM CONTINUUM[™] Assessment

Required Role(s):

CONTINUUM[™] User

To view complete an ASAM CONTINUUM Assessment, follow the steps below.

1. Ensure you are in the context of the client with whom you are conducting the ASAM CONTINUUM Assessment. Their client number should appear on the screen. From the ASAM List screen, to begin administering an ASAM CONTINUUM[™] Comprehensive assessment click **Add CONTINUUM[™] Assessment**.

Florida WITS Provider 1, Facility 1 Provider 1, Facility 1, Provider									
🛓 Tiger, Tony J593481MX953565 1 🔹 SRS Reports 👁 Snapshot									
Home Page ASAM List Add CONTINUUM™ Assessment									
Agency	Actions Assessment Date	Source	Program	Staff Name	Recommended Level of Care	Status	Updated Date		
✓ Client List									
Client Profile									
- Activity List									
Intake									
CONTINUUM Triage™									
- ASAM									
Profile									
Program Enroll									

Note: When a user clicks on Add CONTINUUM[™] Assessment link, they will be taken into the CONTINUUM platform through a new tab, which open in their browser.

Users may need to allow pop ups from this site in order for a new tab to open in their browser to perform the CONTINUUM[™] Assessment. An example of a message you may see is below. See Appendix B for further instructions. Please always allow pop up's.

				Always allow
Internet Explorer blocked a pop-up from continuumwits-qa.witsweb.org.	Allow once	Options for this site 🔻		More settings
			_	

The very first time a clinician clicks on the Add CONTINUUM[™] Assessment link, you will be asked to review and agree to an end user license agreement. Below is an example of that screen. Scroll down to the bottom of the screen and click on "I Agree".

The very first time a clinician clicks on the **Add CONTINUUM™ Assessment** link, a new tab will open in your browser and you will be asked to review and agree to an end user license agreement. Below is an example of that screen. Scroll down to the bottom of the screen and click on "**I Agree**".

ASAM CC THE ASAM CRITEI ASAM CRITERIA DECISION ENGINE
END USER LICENSE AGREEMENT BY ACCESSING OR USING THE CONTINUUM TM DEMONSTRATION SOFTWARE WEBSITE ("WEBSITE") AND PAYING (OR HAVING PAYMENT MADE ON YOUR BEHALF BY AN EMPLOYER OR OTHER
AITHORIZE INTITY THE SPECIFIE LICENSE FEE, YOU AGREE TO ALL OF THE FOLLOWING PROVISIONE AND INTIE NITO A LEGALI WITH AND AGREEMENT WITH CONTINUUM ¹⁰ WHICH FOR TRIPPOSES OF THIS AGREEMENT HOULDES THE AMBECTS SOCIETY OF ADDICTION MEDICINE AND TS AFRILIERS NON INCLUDES FEE SYSTEMS OF LIDES THE AMBECTS OF URALLY TO ADDIE BY THE PROVISIONS OF THIS AGREEMENT, CONTINUES THE AVERTS THE ROAT TO ADDICT Y THE PROVISIONS AND THE MARTENENT AT ANY TIME BY PROSTING SUCH MODIFICATIONS OF THIS ASSESSMENT AT ANY TIME BY PROSTING SUCH MODIFICATIONS TO THIS WEBSTEL CONTINUED ACCESS TO BE UP FOR THIS WEBSTELE SUCH PROSTING UNIT SAFETING TO SUCH MODIFICATIONS, FE ANY.
SCOPE OF LICENSE The information accessible on this Website (including specifically the ASAM Criteria Software and any derivative product) is owned by the American Society of Addiction Medicine (ASAM) unless
chevelse indicated. You are autorized to use this information provided on the Website solely for your individual use and solely for the purpose specified herein. You may not access or use this information provides in the information provides on the events engineer the software or difference information agrounds from this Website to create any competing product. You may not access or use this information provides information provides information aground provide information aground provide information aground provides information provides provides information provides inf
under federal copyright law. YOU AGREE TO NOT INPUT ANY PROTECTED HEALTH INFORMATION (AS SUCH TERM IS DEFINED BY THE REGULATIONS ISSUED UNDER THE HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT OF 1986. SAMENDEDID ON OTHER PERSONAL DATA INTO THE WEBSTE. ONLY HYPOTHETICAL SAMPLE DATA SHOULD BE USED AND YOU ACCEPT FUL
LEGAL RESPONSIBILITY FOR ANY SAMPLE DATA YOU INSERT INTO THE WEBSITE. You may not access or use this Website or the information generated by it for commercial competitive, or any other purposes, nor may you reverse engineer the software or otherwise use the software and the information gained from this Website to create any competing product. You may not modify, republich, post, transmit, or distribute any information without the express writter consert of KANM. You may not the information only to the earth necessary for XAMM.
expressly retains all right title, and interest in and to any proprietary information. Failure to adhere to these provisions could subject you to serious penalties under federal copyright law. As a condition of using this website, and to the maximum extert have by law, you also are deemed to be providing ASAM with permission to use your electronic mail address to provide you with future information about any products or services offered by ASAM.
INFORMATIONAL NATURE OF THE SITE NO MEDICAL ADVICE THE INFORMATION ON THE WEBSITE IS INTENDED TO IMPLEMENT THE ASMM CRITERIA FOR CLINICAL DECISION SUPPORT, BUT IT SHOULD NOT BE CONSTRUED AS MEDICAL ADVICE. THIS
NFORMATION SHOULD NOT BE USED IN PLACE OF APPLICABLE PROVIDER STANDARDS OR IN FLACE OF SEENING PROFESSIONAL MOLICAL ADVICE. DAGANOSIS, OR TREATMANT BY LICENSED PRACITIONERS, COMINULIN ^{IA} DORIS NOT PRACITCE MEDICINE OR LAW, AND DOES NOT OFFER ANY OTHER PROFESSIONAL ADVICE OR SERVICES, YOU ASSUME FULL RESPONSIBILITY FOR APPROPRIATE USE OF THE INFORMATION AVAILABLE THROUGH THIS WEBSITE.
CONTINUUM TM does not recommend or endorse any specific tests, physicians, products, procedures, opinions, or other information that may be mentioned on the Website. PASSWORD AND SECURITY
You are solely responsible for maintaining the confidentiality of any user name and password you use to access the Website and are Milly responsible for all activities that occur under your password or access. The super (lot notify the ASMM help feak or such other contract as ASMM any provide form time to time immediately drar youraborized use or account or any other breach of security and (ii) to ensure that you exit from your account at the end of each session. CONTINUENN TM cannot and will not be liable for any loss or damage arising from your failure to comply with this provision.
save to comply with this provision. HOSTING CONTINUUM ^{TW} may provide links to the websites or services of third-party sites. Links to such third-party sites do not constitute an endorsement by CONTINUUM ^{TW} of such sites or the products.
content, materials, or information presented or made available by such sites. You acknowledge and agree that CONTINUUM ¹⁰ is not responsible for any damages or losses caused or alleged to have been caused by the use of any third-party sites or from the products, content, material, or information presented by or available through those sites.
This Website and its content are hosted by an independent corporation with whom ASM has contracted. This IULA is subject to the laws of the State of Manyland. DISCLAIMER OF WARRANTY
THIS WESTE AND ALL SERVICES AND INFORMATION MADE AVAILABLE ON OR THEOLOGIET HIS WESTE ARE PROVIDED ON AN 7% STATUS IN THE IS "AND TO SAVAILABLE" BASS WITHOUT REPRESENTATIONS OR WARRANTERS OF ANY NOW MATTSOURD SERVICES OR MAYED, INCLUDING WITHOUT UNITATION NON-INRERINGATANTIUS (THISTORS A PARTICULAR PURPOSE, OR ACCURACY OF INFORMATIONAL CONTINT. Without limiting the foregoing. CONTINUUM ^{IM} makes or programmate about the accuracy, reliability, completeness, contenties of the context is advante text, applicative vide, links or communications provided on or through the use of the Webaits.
When using the Website, information will be transmitted over a medium that may be beyond CONTINUUM ¹⁰⁴ scontrol and jurisdiction. Accordingly, CONTINUUM ¹⁰⁴ does not assume any liability for or relating to the delay, failure, interruption, or comption of any data or other information transmitted in connection with use of the Website.
CONTRAININ ^{MO} DOES NOT WARRART THAT THIS WEISTE OR ANY SERVICES OR INFORMATION MADE AVAILABLE ON OR THEOLIGH THIS WEISTE, INCLUEING WITHOUT BURATION ANY THIED-PARY SOFTWARE PRODUCTS, ITEMS OR OTHER MATERIALS USED IN CONNECTION WITH THIS WEISTE. WILL BE TIMELY, SECURE, UNINTERRUPTED OR ERROR FREL OR THAT DEFECTS WILL BE CORRECTED.
ANY INFORMATION DOWNLOADED OR OTHERWISE OBTAINED THROUGH THE USE OF THIS WEBSITE IS DONE AT YOUR OWN DISCRETION AND RISK. YOU SHALL BE SOLELY RESPONSIBLE FOR ANY DAMAGE OR LOSS OF DATA THAT RESULTS FROM THE DOWNLOADING OR USE OF THE INFORMATION AND FOR ANY RESULTS OR LACK OF RESULTS FROM THE USE OF SUCH INFORMATION.
LIMITATION OF LABILITY IN NO EVENT SHALL CONTINUUM ^{IN} BE LUARLE FOR ANY CLAINS OR LOSSES WHATSORVER OF ANY KIND, WHETHER DIRECT, INDIRECT, SPECIAL, INCIDENTIAL, CONERQUENTIAL OR PUNITIVE, AND WHETHER ARSING FROM AN ACTION IN CONTRACT, TORT, OR OTHERWISE RELATE TO GO IN CONNECTION WITH THIS WEBSITE OR ANY SERVICES OR INFORMATION MADE AVAILABLE
ON OR THROUGH THIS WEBSITE WITHOUT LIMITING THE GENERALITY OF THE FORECOME, CONTINUUM ^{ME} SHALL NOT BE LARLE FOR ANY CLAMS OR LOSSES IN CONNECTION WITH EPROPS, OMISSION, OR INACCURACIES OF INFORMATIONAL CONTENT, OR ANY DECISION MADE IN RELAYEE ON THE INFORMATION CONTAINED ON OR ACCESSINE THROUGH THE WEBSITE. YOUR SOLE REMOVE FOR ANY CLAMS IN CONNECTION WITH THE WEBSITE TO DOSCONTINUE USING THE WEBSITE AND THE RELATED CONTINUE TO THE PROFILE FOR ANY CLAMS. THE PROGRAM
LIMITATION SHALL APPLY AND SURVIVE NOTWITHSTANDING ANY FAILURE OF ESSENTIAL PURPOSE OF ANY REMEDY. SOME JURISDICTIONS DO NOT ALLOW THE EXCLUSION OF CERTAIN WARRANTIES OR THE LIMITATION OR EXCLUSION OF LIABILITY FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES.
ACCORDINGLY, SOME OF THE ABOVE LIMITATIONS MAY NOT APPLY TO YOU. INDEMNIFICATION YOU AGREE TO INDEMNIFY, DEFEND AND HOLD CONTINUUM ^M HARMLESS FROM ANY AND ALL CLAIMS OR LOSSES ARISING FROM YOUR USE OF OR RELIANCE ON THIS WEBSTE OR ANY
YOU AGREE TO INDEMNIFY, DEFEND AND HOLD CONTINUUM." HAWALESS FROM ANY AND ALL CLAIMS OR LOSSES ARISING FROM YOUR USE OF OR RELANCE ON THIS WEBSTE OR ANY SERVICES OR INFORMATION MADE AVAILABLE ON OR THROUGH THIS WEBSTE. CHOICE OF LAW; ENTIRE AGREEMENT; SEVERABILITY; NO WAIVER
This Agreement shall be governed by and interpreted in accordance with laws of the State of Maryland, without giving effect to any conflict of laws provisions. The parties hereby consent to the exclusive jurisdiction of and agree that versue is proper and convenient in the state and federal courts situated in Maryland.
This Agreement constitutes the entire agreement between you and us with respect to the use of Website and the content. If any provision of this Agreement is held by a court of competent jurisdiction to be invalid or unenforceable, then such provision shall be enforced to the maximum extent permissible so as to affect the intent of this Agreement and the Agreement and all continue in full force and effect.
The failure of CONTINUUM TM to exercise or enforce any right or provision of this Agreement will not be deemed a waiver of such right or provision. SURVIVAL; CLAIMS
The provisions of this Agreement exist until notice of termination has been sent by Continuum or ASAM, except for provisions which by their nature would continue beyond termination. Any claims arising in connection with your use of the Website or any content must be brought within one (1) year of the date of the event giving rise to such action. Remedies under this
Agreement are exclusive and are limited to those expressly provided for in this Agreement. SPECIAL TERMS AND CONDITIONS REGARD DSM-5 Two Workste meetings within Powerskie and Statistics For Substatuse Education and Education POSL 57 and means meetings (POL 5 Powerskie Caluments Education and Powerskie Powerskie).
This Website contains portions of the Diagnostic and Statistical Manual of Mental Disorders. FMH Edition (TDM 57) and more specifically, DSM-5 Diagnostic Criteria for Substance-Related and Addicible Disorders. Furgificial anguage ONJy For any such proforms. The following addicional terms and conditions applications. The Disorders and a conditions applications of DSM-5 are reprinted with permission from the Diagnostic and Statistical Manual of Mental Disorders. Fifth Edition, TM Copyright @2013 American Psychiatric Association ("APA"). All
Eights Reserved. Unless authorated in writing by the APA, no part may be reproduced or used in a manner inconsistent with the APA's copyright. This prohibition applies to unauthorized uses or reproductions in any form. The American Psychiatric Association is not affidiated with and is not endoning this Website. The terms 'DSM' and 'DSM-5' are registered trademarks of the American Psychiatric Association, and are used with permission herein. Use of these terms is prohibited without permission of the
American Psychiatric Association. Use of this trademark does not constitute endorsement of this Website by the American Psychiatric Association. DSM-5 is not a substitute for, is not designed to and does not provide, medical advoce. It is a guide for dinicians. Every dinician should use his or her own medical judgment and skill in diagnosing mental illness. Note: ASM not the APA shall be liable to any third party fraces of DSM-5 discograd professional medical advice, or delay in seking such advice. Because of something they
twe read in the DSM-S. Nether ASM nor the ARA shall be liable to any third party of naders rely stely on information in DSM-S in making diagnosis, or in place of seeking professional medical advice. RELIANCE ON ANY INFORMATION CONTAINED IN DMA-S IS SOLEY AT THE READERS OR USERS OWN RISK. Moreover, the APA is not responsible or liable to any third party for any advice. course of treatment or diagnosis provided by a physician or other health care professional. The APA neither
recommends nor endorses any specific tests, products, procedures, opinions or other information that may be recommended to a reader or user by a health care professional. Use of any portions of the DSM-5 other than those expressly allowed under this EULA is prohibited.
For Uses may not make any back-up or archival copy of the Webbie without the prior written consent of ASAM. For any such authorized back-up copy containing any portion of DSM-5, the copyright and trademark notices above indicating ownership of DSM-5 by the APA must appear. The APA distains any bability for any consequence due to use, misase, or interpretation of information contained or not contained in the DSM-5. THE APA DEPESSLY DISCLAIMS AND
The APA disclams any liability for any consequences due to use mises, or interpretation of information contained or not contained the DSM-5. THE APA DEPRESSIV DISCLAIMS AND EXCLUDES ALL WARRANTIES (INCLUDING WITHOUT LIMITATION, MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE) AND REPRESSIVATIONS, WHETHER EXPRESS OR IMPLED, IN ELIZITION TO ANY ISON USERS VIS OF DSM-5 CONTAINED IN THIS WEBSTE CHARAVILL NOT BE LIABLE TO THE END USER OX ISON PROVIDED. LOSS OF USE OR FOR ANY INIDIRECT, SPECIAL, OR CONSEQUENTIAL DAMAGES WHETHER BASED UPON A CLAIM OR ACTION OF CONTRACT, WARRANTY, NESUGENEX, STRICT LIABILITY, OR OXIDE TOYET, DIRE IN LIA MONTENDE DOSTINITY THERE AND LINE ADDRESS AND REPORT TO A THE AND LINE OF USE IN THE ORDER OF THE DAMARCES, STRICT LIABILITY, OR DIVED FORT, FORE IN IT IS AMARCE AT THE DOSTINITY THERE AND LINE ADDRESS AND REPORT TO A TUBER AND LINE TO THE AND LINE AND LINE DOSTINITY AND LINE ADDRESS AND LINE
LABILITY OR OTHER TORT, EVEN IF IT IS AMARE OF THE POSSIBILITY THEREOF, ISO USERS AGREE THAT THE ENTIRE LIABILITY OF END USER WILL IN NO EVENT EXCEED AN AMOUNT EQUAL TO THE FEE PAID FOR THE END USERS TO USE THIS WEBSITE. This EULA shall terminate in the event any End User violates the special terms and conditions above.
Lágres Liða Not Ágres

Users will also be asked to review all ASAM training materials and user guides located <u>here on ASAM CONTINUUM's</u> <u>Knowledge Base web page.</u>



- Once the user clicks the I have reviewed all ASAM CONTINUUM™ Training Materials option, they will no longer see this message but can always access these resources from within the assessment by clicking the Q&A Knowledge Base and Training link located in the left hand navigation panel.
- If a user clicks the I will review the ASAM CONTINUUM[™] Training materials at a later time option this screen will continue to appear until the I have reviewed all ASAM CONTINUUM[™] Training Materials option is clicked.

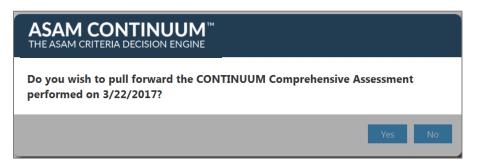
ASAM CONTINUUM [™] THE ASAM CRITERIA DECISION ENGINE						
? Q & A Knowledgebase and	<u>Training</u>					
General Information						
Section	% Complete					
General Information	0%					

2. A new tab will open in your browser displaying the CONTINUUM[™] Comprehensive assessment.

<u>Note</u>: If you are performing a re-assessment on a client, you will receive a popup window asking if you would like to copy forward the last assessment performed on XX date. If you Click **Yes**- all of the information will be pulled forward into your new assessment and the new assessment will be editable.

E https://asam-api-demo.feisystems.com/interview/Gene	alleforr P = 🔒 C 💽 CONTINUUM* WITS	- □ × 命分感 ©
	Created By: Ferrante, Maria General Information	Print
General Information		
Section % Complete	Class of Assessment	
General Information 100%	This interview was conducted By mail	
🧑 Medical History		
Employment and Support History	Special Interview Circumstances Patient unable to respond	
Drug and Alcohol	How long have you lived at your current address?" 0 0	
🥏 Legal Information	address?	
Family and Social History	es "Is this residence owned by you or your Yes No	
Psychological		
Interview Completion	es "Have you been living in a hospital, rehab, jail or other controlled environment within the	
	past 6 months? In the past month? How many	~
Terms and Conditions	<prev next=""></prev>	Submit

3. Click No - You will be taken into a new blank assessment



If you performed a CO-Triage screener for this client in the **same agency** you will receive a popup window asking if you would like to copy forward the last CO-Triage Screener performed on XX date and have its corresponding questions and answers pre-populate the CONTINUUM assessment. Click **Yes** or **No**.



- 4. Administer the assessment to the client.
 - As you enter data a **Save** button will appear. It is best practice to save information that has been entered throughout the course of the assessment at the end of each screen.
 - Use the **Previous** and **Next** buttons to move from screen to screen or click on the desired section and subsection in the navigation window.
 - Once all sections are 100% Complete, the green **Submit** button will appear. Click the **Submit** button.

⇔ ntinuum [•]	[Sam Jones Birth Date: 01/02/1950 Gender; Male Religion: Protestant Ethnicity: Caucasian		
THE ASAM CRITERIA DECISION ENGINE	Create	d Byt maria.ferrante@safeharbor.com		Print
Question and Answer Knowledgebase	Ge	neral Information		_
A Maria Ferrante Change Password Los Out Safe Harbor Edit		Class of Assessment	Intake V	
Home Assessment Patient		This interview was conducted	By phone 💌	
🖉 General Information				
🖉 Medical History	*	Special Interview Circumstances	Patient terminated V	
Employment and Support History	14	"How long have you lived at your current address?"	Years Months 0 0	
Drug and Alcohol				
Section % Complete	E&	"Is this residence owned by you or your family?"	Yes No	
Used Substances 100%				
CIWA Sedative and Alcohol Scale 100%		"Have you been living in a hospital, rehab, jall or other controlled environment within the past 6 months? In the past month? How many days		
Addiction Treatment History 100%		ago did that end?"		
Additional Addiction and Treatment Items 100%				_
Alcohol and Drug Interviewer Rating 100%		Has patient been in penal or chronic care setting within the past 14 days or is the patient within 6 months after release from such a setting?	Yes No	
Legal Information				
Eamily and Social History		Intake Notes		
Psychological			This is a Demo Site do not enter any actual PHI.	
J Interview Completion				
Terms and Conditions	< Pre	W Next>	8	ubmit

NOTE: After clicking the green **Submit** button, but before receiving the ASAM Summary and Narrative Reports, the Level of Care Review screen will appear if the clinician recommended level of care and CONTINUUM recommended final levels of care differ.

- This screen gives the user the ability to provide feedback on the CONTINUUM recommended final levels of care and the clinician recommended level of care.
- Feedback provided will be considered by the ASAM architects for future adjustments.
- Please complete all yellow required questions and click the **Continue** button.

Level of Care Review		
There was a discrepancy between your acceptable level(s) of care and algorithm, please provide as much detail about why you think your re-	ASAM CONTINUUM [™] final recommended level(s) of care. In order to help ASAM refine commendations are justified.	the
Clinician's acceptable level(s) of care.	ASAM CONTINUUM [™] final recommended level(s) of care.	
☑ Level 1 - Outpatient Treatment	 Level 3.7 - Medically Monitored Intensive Inpatient Treatment Level 4-WM - Medically Managed Intensive Inpatient Withdrawal Management 	
Reason for disagreement between your acceptable level(s) of care and ASAM CONTINUUM [™] final recommended level(s) of care?		~
A Please provide further explanation:		
	This is a Demo Site do not enter any actual PHI.	
	Continue	

- 5. The following screen will appear indicating that the assessment has been successfully scored.
- 6. To review the report for this client click **View Narrative Report or View Summary Report**.

DaisyMF Duck Birth Date: 08/14/ Created By: 130, trainee	(2000 Gender: Female Religion: Other Ethnicity: Undeclared	Print
	The assessment has been successfully scored! Click desired report button to review. View Narrative Report View Summary Report	

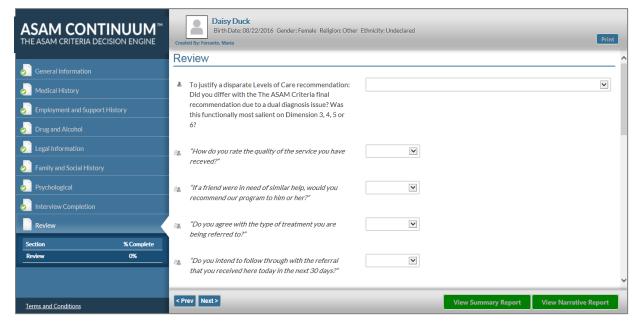
7. Clicking on either **Report** button will cause the following dialog box to open at the bottom of your screen, where you can view the report. Optionally, you can save to your desktop. Will also have the ability to view the report in WITS.

Do you want to open or save AssessmentReport_b86f588d-a7fb-4ca2-86e3-a745011380c8.pdf (822 KB) from asam-api-demo.feisystems.com?						
	Open	Save	•	Cancel		

8. The exhibit below shows an example of the Summary ASAM CONTINUUM report. The last or second to last page contains the ASAM Criteria final Level of Care recommendations for your client.

ASAM CONTINUUM THE ASAM CRITERIA DECISION ENGINE Massessment bot: 12/24/2015 5.22 PM Assessment bot: 12/24/2015 5.27 PM	ASAM CONTINUUM THE ASAM CRITERIA DECISION ENGINE THE ASAM CRITERIA DECISION ENGINE
ASAM CONTINUUM TM THE ASAM CRITERIA DECISION ENGINE TM Patent: 10000 Interviewe: gasthend@mail.com Assessmert Begun: 12/28/2015 3:322 PM Assessmert Begun: 12/28/2015 3:322 PM Assessmert Begun: 12/28/2015 3:322 PM Assessmert Begun: 12/28/2015 3:322 PM Assessmert Begun: 12/28/2015 3:322 PM Assessmert Begun: 12/28/2015 3:322 PM	ACCESS TO TREATMENT ISSUES The following items related to access to treatment were noted while completing this assessment: 1. Joanne does not have continuous monitoring available on an outpatient basis for the next 8 to 24 hours. 2. The clinician deduced from the interview or has information that indicates that her current behavior may be inconsistent with reliable self-care, safety, or an ability to participate effectively in treatment. 3. If medications are currently prescribed on ville beyreschedd during treatment, the patient may be either unable or unwilling to self-administer these medications with acceptable compliance. FINAL LEVEL OF CARE RECOMMENDATIONS Joanne Jones should be considered for multiple levels of care. The treatment team should consider her history carefully and place the patiert in the level of care that best suits her presentation. 1. The patient could be considered for treatment in a (Level 2.5 and 3.1) program that combines Level 2.5,
NOTE: The report contains an analysis and a initial joisement recommendation derivedby analyzing according lines using a local contensis a global contensis and the global contensis and g	 In addition to Level 25 care, the patient is best initial yreated in a Co-Coursing Enhanced program, as she meets the diagnostic citeria for a Mental Disorder as well as a Substance Use Disorder. The patient is best initially treated in a Level 3.7 – medically monitored intensive inpatient treatment program. Ms Jones has a co-occurring Mental Disorder that meets the stability criteria for placement in a Co-Occurring Capable program. The patient has met one or more dimensional criteria for Opoid Treatment Services (OTS) but has not meet final level criteria for OTS.
	Copyright: "Reprinted with permission from the Diagnostic and Statistical Manual of Mental Disorders, Fifth Edition." "Copyright@2013 American Psychiatric Association. All Rights Reserved. Unless suthorated in writing by the APA, no part may be reporduced or used in a manner inconsistent with the APA's copyright. This prohibition applies to unauthorized uses a reproductions in any form. The American Psychiatric Association is not affinated with and is not endorsing this product. Trademark:
*agi 1of7	Page Gol7

9. Next, complete the optional CONTINUUM[™] Review section by returning to the CONTINUUM navigation menu and click on **Review**.



10. Return to CONTINUUM WITS by clicking on the CONTINUUM WITS tab in your browser.

🗲 🛞 📙 https://asam-api-demo.feisystems.com/interview/Gener	alinform 🔎 = 🗎 🕈 👩 CONTINUUM [™] WITS 🛛 🞼 esami-api-demo,feisystem	×	- □ × 命☆範 ⁽¹⁾	
ASAM CONTINUUM [™] THE ASAM CRITERIA DECISION ENGINE	MiWITSTabe CONTINUU Birth Date: 10/19/2000 Gender: Female Reli Created By: Ferrante, Maria		Print	
General Information	General Information		^	
Section % Complete	Class of Assessment	Intake V		
General Information 100%	This interview was conducted	By mail 🔽		
Medical History				
Employment and Support History	Special Interview Circumstances	Patient unable to respond		
Drug and Alcohol	How long have you lived at your current	Years Monthy 0 0		
Legal Information	address?"			
Family and Social History	"Is this residence owned by you or your family?"			
Psychological	tenniy:			
JINTERVIEW Completion	"Have you been living in a hospital, rehab, jail or other controlled environment within the	✓		
	past 6 months? In the past month? How many		~	
Terms and Conditions	< Prev Next >	View Summary Report	View Narrative Report	

Actual Level of Care Placement in CONTINUUM WITS

1. From the ASAM List screen, hover over the pencil icon of the assessment that you just created in CONTINUUM[™] and click on **Review**.

ASAI	M List				A	dd CONTINUUM"	Assessment
Actions	Assessment Date	Source	Program	Staff Name	Recommended Level of Care	Status	Updated Date
	2/22/2019	CONTINUUM™		Ferrante, Maria		In Progress	2/22/2019
	Review						

- 2. You are now taken to the CONTINUUM WITS ASAM Profile screen.
- 3. To pull the recommended level of care for each dimension and the final recommended level of care from the CONTINUUM[™] assessment performed, under Administrative Actions at the bottom of the screen, click **Sync with CONTINUUM[™]**.

✓ Client List	ASAM
Client Profile	ASAM
	Dimension 1 - Acute Intoxication and/or Withdrawal Potential Level of Risk Level of Care
✓ ASAM Profile	Comments
	2 - Biomedical Conditions and Complications Level of Risk v Lowest Level of Care
	Comments
	3 - Emotional, Behavioral, or Cognitive Conditions Level of Risk and Complications
	Comments
	4 - Readiness to Change Level of Risk v Lowest Level of Care
	Comments
	or Continued Problem Level of Risk Potential
	Comments
	6 - Recovery / Living Environment Level of Risk v Lowest Level of Care
•	Comments
	Recommended Clinical Override v
	Recommended from CONTINUUM ^{***}
	Actual Level of Care
	Comments
	Assessment Date 12/1/2017 Program v
	Administrative Actions Sync With CONTINUUM™ Review CONTINUUM™ Assessment
	ASAM Notes Cancel Save Finish

4. The recommended level of care for each dimension and the final recommended level of care from the CONTINUUM[™] Assessment are now pre-populated into WITS.

- 5. On the ASAM Screen:
 - Enter the Actual Level of Care the client has been placed in, if different than the Recommended Level of Care.
 - Enter a Clinical Override Reason if the actual level of care is different from the recommended level of care.
 - Enter comments in the Comment Box

ASAM			
Dimension			
 Acute Intoxication and/or Withdrawal Potential 	Level of Risk	Lowest Level of Care Opioid Treatment Program	
	Comments	3.7-WM - Medically Monitored Inpatient Withdrawal Management, 4-WM - Medically Managed Intensive Inpatient Withdrawal Management , Opioid Treatment Program	#
2 - Biomedical Conditions and Complications	Level of Risk	Lowest Level of Care Opioid Treatment Program	
	Comments	3.7 - Medically Monitored Intensive Inpatient, Opioid Treatment Program	
3 - Emotional, Behavioral, or Cognitive Conditions and Complications	Level of Risk	Lowest Level of Care Opioid Treatment Program	A
	Comments	Opioid Treatment Program	
4 - Readiness to Change	Level of Risk	Lowest Level of Care 1 - Outpatient Service	
	Comments	1 - Outpatient Service, 2.1 - Intensive Outpatient, 3.7 - Medically Monitored Intensive Inpatient	
5 - Relapse, Continued Use, or Continued Problem Potential	Level of Risk	Lowest Level of Care 1 - Outpatient Service	M
	Comments	1 - Outpatient Service, 3.1 - Clinically Managed Low-Intensity Residential, 3.3 - Clinically Managed Population Specific High-Intensity Residential, 3.5 - Clinically Managed High-Intensity Residential, 3.7 - Medically Monitored Intensive Inpatient, Opioid Treatment Program	~~
6 - Recovery / Living Environment	Level of Risk	Lowest Level of 1 - Outpatient Service	
	Comments	 Outpatient Service, 2.1 - Intensive Outpatient, 3.3 - Clinically Managed Population Specific High- Intensity Residential, 3.5 - Clinically Managed High-Intensity Residential, 3.7 - Medically Monitored Intensive Inpatient, Opioid Treatment Program 	~
Lowest Recommended 3.7-WM - Med Level of Care	lically Monitor	ed Inpatient Withdrawal Management Clinical Override	Ŧ
		ed Inpatient Withdrawal Management, 4 - Medically t	
Actual Level of Care			
		Comments	
Assessment Date 7/21/2016		Program	
Administrative Actions —			
Sync With CONTINUUM™	Review CON	TINUUM™ Assessment View CONTINUUM™ Summary Report View CONTINUUM™ Narrative Report	
		Cancel Save Finish	

- 6. Upon completion under **Administrative Actions** you have the option to click **Sign ASAM**. The record is now uneditable and it is now time and date steamed by the user who signed the record.
- 7. Under Administrative Actions regardless of whether or not the record is signed users can always:
 - Review the CONTINUUM[™] Assessment performed on this patient
 - Review the CONTINUUM[™] Report generated for this assessment
- 8. Click Save, or Finish to save and return to the list screen.

ASAM CO-Triage[™] Screening and Referral

Required Role(s):

CONTINUUM Triage [™] Access

To view complete an ASAM CONTINUUM Triage [™] (CO-Triage) Assessment, follow the steps below.

- 1. From the Activity List screen, click the **CONTINUUM™ CO-Triage** [™] menu item from the left hand navigation panel.
- 2. Ensure you are in the context of the client with whom you are conducting the ASAM CONTINUUM Assessment. Their client number should appear on the screen.
- 3. To begin administering an ASAM CO-Triage [™] Screener click **Add CONTINUUM Triage** [™] on your CONTINUUM Triage [™] List screen.

Florida WITS Provider 1, Facility 1 a Ferrante, Maria - Logout						
🎍 Pie, Apple Q773482MT593544 1 🔹 SSRS Reports ● Snapsho						
Home Page	CON	TINUUM Triage™ List				Add CONTINUUM Triage™
Agency	Actions	Assessment Date	Staff Name	Status	Provisional LOC	Category of Final Disposition
Client Profile						
→ Activity List						
Intake						
CONTINUUM Triage™						

Note: When a user clicks on Add CONTINUUM Triage [™] link a new tab will automatically open in your browser. You will be taken into the ASAM CONTINUUM platform.

Users may need to allow pop ups from this site in order for a new tab to open in their browser to perform the CO-Triage™. An example of a message you may see is below. Please always allow pop up's.

The very first time a clinician clicks on the **Add CONTINUUM Triage™ Assessment** link, you will be asked to review and agree to an end user license agreement. Below is an example of that screen. Scroll down to the bottom of the screen and click on "**I Agree**".

			Always allow
Internet Explorer blocked a pop-up from continuumwits-qa.witsweb.org.	Allow once	Options for this site 🔻	More settings



Users will also be asked to review all ASAM training materials and user guides located <u>here on ASAM CONTINUUM's</u> <u>Knowledge Base web page.</u>



- Once the user clicks the "I have reviewed all ASAM CONTINUUM™ Training Materials" option, they will no longer see this message but can always access these resources from within the assessment by clicking the Q&A Knowledge Base and Training link located in the left hand navigation panel.
- If a user clicks the I will review the ASAM CONTINUUM[™] Training materials at a later tim e option this screen will continue to appear until the I have reviewed all ASAM CONTINUUM[™] Training Materials

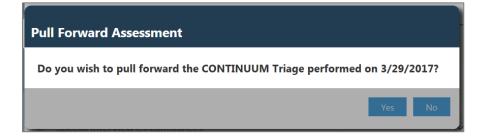


option is clicked.

4. A new tab (with a URL starting with "asam" will open in your browser displaying the ASAM CO-Triage [™] screener.

() In https://asam-api-demo.feisystems.com/triageint	nview/TriageSection/Edit/Sec05fc2-e4e4-4e13-935b-a6H0106717a	D - A CONTINUUM Triage" List	ASAM **
File Edit View Favorites Tools Help X 📆 Convert = 🐉 Select		WITS Tab	CONTINUUM Tab
ASAM CONTINUUM [™] THE ASAM CRITERIA DECISION ENGINE	Daisy Duck Birth Date: 08/22/2016 Gender: Female Religion: Other Created By: Tercante, Maria	Ethnicity: Undeclared	Print
🍶 CO-Triage [™]	Thage		
Section % Complete Triage 100% Review	Thank you for doing this screening with me today. I'd like to spend about 10 minutes with you now, asking you just a few questions to get a rough sense of the best place to start your care. When you arrive there, they will conduct a more detailed assessment and discuss with you whether you should start treatment there or at a place that offers a more intensive or less intensive level of treatment. Is that OK?"	Yes	
	Are you asking for help with a substance use problem that is either alchohol or drugs? Is this for yourself or someone else?	Yes, substance use problem of self	

<u>Note</u>: If you performed an ASAM CO-Triage screener for this client you will receive a popup window asking if you would like to copy forward the last ASAM CO-Triage Screener performed on XX date and have its corresponding questions and answers pre-populate into a new ASAM CO-Triage screener. Click **Yes** or **No**.



Administer the assessment to the client. As you enter answers, a blue **Save** button will appear at the bottom left hand corner of the ASAM CO-Triage [™] screen. Clicking on **Save** allows you to save the entered data if you need to stop the CO-Triage process before all the questions are answered. Once all of the questions have been answered and the CO-Triage [™] is 100% complete, the green **Submit** button will appear at the bottom, right hand corner of the ASAM CO-Triage [™] screen. Click the **Submit** button.

ASAM CONTINUUM THE ASAM CRITERIA DECISION ENGINE CO-Triage [™] Section %Complete Triage 100%	Daisy Duck Birth Date: 08/22/2016 Gender; Female Religion: Other Ethnicity: Undeclared Created By: Ferrante: Mans Triage ************************************	Print
	intensive level of treatment. Is that OK?" Image: Second	
Terms and Constitions	Alcohol Marijuana or cannabis Prev Next>	> omit

 After clicking the green Submit button, you receive the following screen indicating that the ASAM CO-Triage[™] has been successfully scored. You can then click on the green View Report button to see the generated the CONTINUUM report.

ASAM CONTINUUM MITHE ASAM CRITERIA DECISION ENGINE	Daisy Duck Birth Date: 08/22/2016 Gender: Female Religion: Other Ethnicity: Undeclared Created By: Ferrante: Maria	Print
CO-Triage [™]	The assessment has been successfully scored!	
Review Section %Complete	Click view report to review. View Report	
Terms and Conditions	<prev next=""></prev>	View Report

6. The exhibit below is the last page of the ASAM CO-Triage [™] report, which contains the Provisional Level of Care Recommendation and the Qualifiers.

С		Daisy Duck Ferrante, Maria	Admission Date: 1/18/2017 3:55 PM Assessment Begun: 1/18/2017 3:55 PM Assessment Ended: 1/18/2017 4:00 PM
19)	Does patient have safe transportation to treatment?	Has both license AND ca	r & can use safely
20)	Would ambulation/mobility problems impede attending treatment?	Yes	
21)	Will daily routine keep patient occupied most days AND free from problematic alcohol or drug(s)?	Yes	
	Comments:		
FINAL	SCORING & PROVISIONAL RECOMMENDATION		
This in	divi dual has met the provisional requirements for: Level 4 - Medi	ically Managed Intensive Inpat	tient Services, Opioid Treatment Services.
QUALI	FIERS - SUBLEVELS OF CARE		
This p Enhan	atient also shows need(s) for the following type(s) of ca ced.	re: Withdrawal Manageme	nt, Co-Occurring Capable, Co-Occurring
Note:			
1.	L-0.5, L-1, L-2 and L-4 in this Triage Tool are fully specifie when none of the other LOCs are specified. This is to ins detail will become known in the full CONTINUUM(TM) a	ure adequate services for t	
2.	L-OTS is not one LOC but includes: OTP (Methadone Ma and XRNTX (Extended-Release NaItrexone). IN PREGNA Otherwise, the choice between OTP, OBOT & XR-NTX LOC, therefore, if L-OTS is recommended in addition t	NCY: Patient should be se should be by patient choic	nt to either OTP, or if unavailable, OBOT. e. L-OTS can be combined with any other
	evaluation.		
3.	If L-4 is recommended, consider ambulance transport, e ill.	g., IT patient is frankly psyc	notic, acutely suicidal, or acutely medically

7. Next, complete the optional ASAM CONTINUUM[™] CO-Triage [™] **Review** section if desired, by returning to the ASAM CO-Triage screener's navigation menu and click on **Review**. As none of the questions in this section are required the percentage complete in the navigation menu will always remain at 0%.

ASAM CONTINUUM [™] THE ASAM CRITERIA DECISION ENGINE	Daisy Duck Birth Date: 08/22/2016 Gender: Female Religion: Other Ethnicity: Undeclared				
	Review				
CO-Triage [™] Review	Category of final disposition (i.e., where the patient is actually being sent to treatment):	V			
Section % Complete Review 0%	Reason for final disposition (i.e., where the patient is actually being sent to treatment), if different from Recommended Plan:	Y			
	NOTE: This provisional recommendation for referral to comprehensive evaluation is not a replacement for individual provider assessment and sound clinical judgement. ASAM and its partners, affiliates, and/or licensees (including FEI Systems) assume no direct or indirect liability for improper care or negative outcomes that may ensue from the use of this instrument. Consider your patient's needs carefully, using this instrument as one of many clinical tools that determine proper care. The criteria MAY NOT encompass all levels and types of services which may be available in a changing health care field. Therefore, the criteria MAY NOT be wholly relevant to all levels and modalities of care. Comments: This is a Demo Site do not enter any actual PHI.				
Terms and Conditions	<prev next=""></prev>				

8. Return to WITS by clicking on the WITS tab in your browser.



Pulling Back the ASAM CO-Triage ™ Report into WITS

1. To begin, in the WITS browser tab, from the ASAM CONTINUUM Triage [™] List, hover over the pencil icon of the CO-Triage record you just created and click **Sync with CONTINUUM**[™]. This pulls back the **CONTINUUM Triage**[™] **report and data into WITS** and makes it available for support staff who cannot access CONTINUUM Triage [™] directly.

Florida WITS	Provider 1, I	ovider 1, Facility 1 🖌 Ferrante, Maria 🗾 Logout							
Pie, Apple Q773482MT593	544 1 🕻					SSRS Reports			
Home Page	CON	ITINUUM Triage™ L	ist			Add CONTINU	IUM Triage™		
Agency	Actions	Assessment Date	Staff Name	Status	Provisional LOC	Category of Final Disposition			
✓ Client List	ľ	2/22/2019	Ferrante, Maria	In Progress					
Client Profile Sync With CONTINUUM™ Review CONTINUUM Triage™									
	Ŭ		,						
Intake									
CONTINUUM Triage™									
► ASAM									

- 2. The ASAM CONTINUUM Triage [™] Report is now pulled back into WITS, the status is also changed to **Complete**.
- 3. Hover over the pencil icon again to:
 - **Review CONTINUUM Triage** TM Allows a user to review the CONTINUUM Triage TM Screener from within ASAM CONTINUM which is in progress or has been completed.
 - View CONTINUUM Triage ™ Report Allows users with access to the ASAM CONTINUUM Triage ™ screen to view the report from inside WITS.

CON	ITINUUM Triage™ Li	st			Add CONTINUUM Triage™
Actions	Assessment Date	Staff Name	<u>Status</u>	Provisional LOC	Category of Final Disposition
	2/15/2019	Ferrante, Maria	Complete	Level 4 - Medically Managed Intensive Inpatient Services	
Sync With CONTINUUM™ Review CONT			eview CON1	⊓NUUM Triage™ │ <u>View CONTINUUM Triage™ Report</u>	

Part 11: Staff Administration

Where: Agency > Staff Members

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

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

wits	STANDARD	WITS	Administrative Agency, Adm	inistrative	: Unit 🖋		J	ones, Ashley 🕶 Logou	
							SSRS Rep	orts 👁 S	napshot
	Q Staff Me	mber Search	1						
Search	Advanced Search	1					O Creat	te New Staff N	lember
Searc	h						Search		_
Showin	g 1-50 of 241		Previous 1 2 3	4 5	Next Select Columns	lll▼ Se	lect View	:=	1
	First Name	Last Name	Agency	<u>Status</u>	Email	<u>Identifier</u>	Start Date	Termination	Date
ø*	Ron	Swanson	Administrative Agency	Active	ron.swanson@pawnee.in.gov	RSwanson177	10/01/2013	09/25/2018	
A	Admin	User	Administrative Agency	Active	noreply@feisystems.com	admin	01/01/2009		
*	Bobby	Mantoni	Administrative Agency	Locked	bmantoni@feinfo.com	bmantoni	04/16/1987	01/08/2010	
6	Chris	White	Administrative Agency	Active	cwhite@feinfo.com	cwhite	04/16/2009		
A	Gagan	Singh	Administrative Agency	Active	gsingh@feinfo.com	gsingh	10/02/2075	04/09/2085	

Figure 11-1: Staff Member Search/List screen

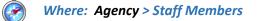
Table View

Showing 1-1 of 1			evious 1 Next	Select Columns	✓ Select Vie	ew 📰 📰 🖾
First Name	<u>Last Name</u>	<u>Status</u>	Email	<u>Identifier</u>	Start Date	Termination Date
Ash	Jones	Active	ashley.jones@feisystems.com	standard.admin	01/01/2017	
Lock Age	ncy Access Re	set Credenti	ials <u>View Profile</u> us 1 Next			

Panel View

Showing 1-1 of 1	Previous 1 Next	Select Columns III - Select View III -	
Ash Jones Active		Lock Agency Access Reset Credentials View Profile	
ashley.jones@feisystems.com			-
standard.admin Sun Jan 01 2017 00:00:00 GMT-05	500 (Eastern Standard Time)		
	Previous 1 Next		

How to Set Up a New Staff Member Account



Follow the steps below to create a new staff account.

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

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

MENU		ff Member Search						
Sei	arch Advanced S	Search					O Create	New Staff Member
s	earch						Search	
Sho	owing 1-23 of 23		Previous 1	Next	Select Columns	III ▼ Se	elect View	:≡ ±
	First Name	Last Name	Agency	<u>Status</u>	Email	<u>Identifier</u>	Start Date	Termination Date
ø	Admin	User	Administrative Agency	Active	noreply@feisystems.com	admin		
ø	System	User	Administrative Agency	Active	noreply@feisystems.com	system		

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

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

Table 11-1: Create New Staff Member fields

Figure 11-2: Staff Member screen

	WITS Training Administrative Agency Administrative Unit 2	1
18.25.4	Create New Staff Member	SSR:
	Prefix:	
	First:	• c
	Preferred:	
	Middle:	II ▼ Select View
	Last:	<u>dentifier</u>
Adı	Staff	dmin
Sys	Suffix:	ystem
Pre Mig		Process-105
SS SS	Not Collected * 👻	srsadm
S Ma	nan	nkatohora
Kri:	Create Cancel	OReilly
S Mic	nele Saul Agency Active misaul@pa.gov	msaul

Figure 11-3: Create New Staff Member screen

4. Click **Create**. The system will redirect to the Staff Member Workspace screen.

Note: The Create button will only appear when all of the required fields have been completed.

Completion Requirements

On the Staff Member Workspace screen, note the Completion Requirements located on the right side. The completion requirements can be entered in any order.



Figure 11-4: Completion Requirements

Add Email Address

- 5. On the Staff Member Workspace screen, point to the Completion Requirements.
- 6. Click Add Email Address. This will open the Contact Information panel.

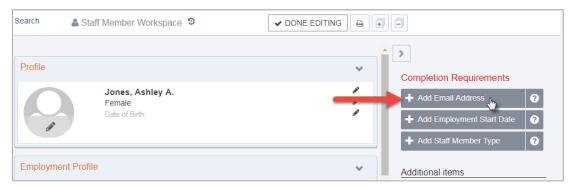


Figure 11-5: Completion Requirements, Add Employee Start Date

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

Contact Ir	nformation	~
		(MA)
M	Email Address: ashley.jones@feisystems.com Primary Save Cancel	

Figure 11-6: Contact Information panel, add primary email address

Note: Staff members can have more than one email address associated with their account, however at least one email address must be marked as "Primary". The Primary email address will receive email notifications for the user to access their account.

Add Employment Start Date

8. On the Staff Member Workspace screen, point to the **Completion Requirements** and then click **Add Employment Start Date**. This will open the Employment Profile panel.

Back to	Search 🔒 Staff Member Workspace 🤊	
Profile Employment Profile User Account	Contact Information Preferred Method Of Contact: Image: Contact Contact: Image: Contact Contact Contact: Image: Contact	Completion Requirements
Contact Information » Identifiers	Add Email Addresses	+ Add Staff Member Type
Domains	 No Items Add Phone Numbers 	Additional items Add Identifier Define Employment Profile
	 No Items Add Physical Addresses 	Add Facility Assignment Add Professional Qualification Add Email Add Email Add Phone Number

Figure 11-7: Add Employment Start Date

9. On the Employment Panel, in the **Employment Date Range** field, enter the employee's start date or use the calendar to select the start date. Stay on the Employment Panel.

Back t	o Search	🛔 Stat	ff Memb	er Worl	kspace	9				
<		nt Profile						~	*	>
Profile	_									Completion Requirements
Employment Profile	Job Title	:							ы.	+ Add Employment Start
User Account »	Select						Ψ.			Date
Contact Information	Incl	ude Job 1	litle in Di	splay Na	ime					+ Add Staff Member Type ?
Identifiers	Staff Me	mber Typ	e:							
Domains	Select						Ψ.			Additional items
	Employn	nent Type	e:							
	Select	71					Ŧ			
	Employa	nent Date	Dango:				- 10			
	01/17/20	0.0	- Ranye.		iii 🗸	Has en	otch h			> Add Professional Qualification
							uuuic			
	<		Jan	uary 2	2017		>			> Add Phone Number
	Sun	Mon	Tue	Wed	Thu	Fri	Sat			
	01	02	03	04	05	06	07			> Manage Accounts and Roles
	0.0	00	10		10	40				
	08	09	10	11	12	13	14			
	15	16	_17 լհ	18	19	20	21			
	22	23	24	25	26	27	28			> Add Note
	29	30	31	01	02	03	04			
	05	06	07	08	09	10	11		Ι.	
	Toda	av C	lear			Do	one			
								~	•	

Figure 11-8: Employment Profile panel, Employment date range

Add Staff Member Type

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

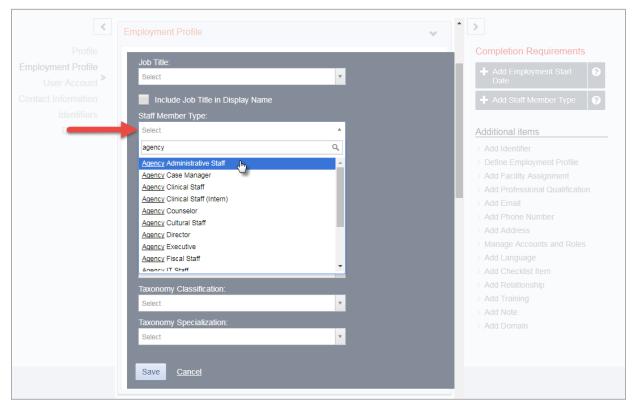


Figure 11-9: Employment Profile panel, Staff Member Type field

- 11. On the Employment Profile panel, click Save.
- **Note**: On the Employment Profile panel, certain options in the Staff Member Type field control additional features within WITS.

Add Facility Assignment

The Facility Assignments section allows you to assign one or more facilities for the staff member.

12. Point to the Additional items section, and then click Add Facility Assignment.

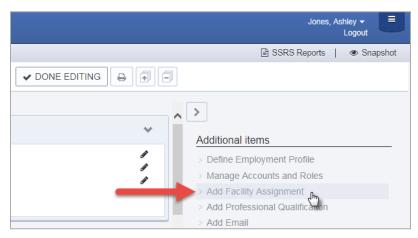


Figure 11-10: Additional Items section, Add Facility Assignment

- 13. In the Facility Assignments section, click on the applicable facilities.
- 14. Select the **Effective Date**.

Facility Assignments		~
Facilities:		
sktest1 test1 test4 test5 testf1 testf2 testf3	Administrative Unit *	
Effective: F 1/17/2017 H – Save <u>Cancel</u>	Has end date	

Figure 11-11: Facility Assignments panel

15. Click Save.

Add User Account

Once items in the Completed Requirements sections have been met for a Staff Member, a user account can be created for the staff member. The user account will allow the staff member to log into WITS and perform various functions based on the roles granted to their user account.

16. In the User Account panel, click Add Account.

Frofile » Employment Profile User Account Contact Information Identifiers	Profile Staff, Agency Not Collected Date of Birth:	Additional items Define Employment Profile Manage Accounts and Roles Add Facility Assignment Add Professional Qualification Add Email
Domains	Employment Profile Job Title: Staff Member Type: Agency Administrative Staff Employment Type: Employment Type: Agency Administrative Staff Employment Type: 01/17/2017 - Taxonomy Classification: Taxonomy Specialization: Relationships: Image: Classification for the staff	Add Phone Number Add Address
	User Account Add Account Contact Information	* *

Figure 11-12: User Account panel, Add Account

17. In the User ID field, type the staff member's login name.

Important: The User ID must be unique for each staff member. Once an account is created, the User ID cannot be changed.

18. In the Email Address field, type the staff member's email address.

Important: WITS will send important login information using the email address provided in this section.

<	User Account	
Employment Profile	User ID:	
User Account »		
	Email Address:	
Identifiers		
	Create Account Cancel	

Figure 11-13: User Account panel, required fields

19. Click Create Account.

User Roles

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

Table 11-2: Role Table

Job Function	System-Level Roles (Assigned under System Administration> System Accounts)	Agency-Level Roles (Assigned under Agency>Staff Member)		
Managing Entity	Access all oversight agencies in read-only			
Users	mode			
	Facility Administrator			
	Program Set Up			
	Staff Administrator			
	View Consented Clients			
	Clinical (Full Access)			
	SSRS Agency Reader			
	Can Associate/Dissociate Agency Account			
	•	•		
Provider Agency		Clinical (Full Access)		
Users		Case ReOpen		
		View Consented Clients		
		CONTINUUM [™] Assessment Clinician		
		SSRS Agency Reader		
		Staff Administrator		
		Note – this should only be provided to users responsible for support/agency administration.		

Assign User Roles

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

User Account	*
User ID: staffadmin	Enable End IP Session Lock Agency Access Reset Credentials Release Agency Lock
System Roles:	
Agency Roles	● Manage roles
Contact Information	*
Preferred Method Of Contact:	d ^a
ashley.jones@feisystems.com Prin	imary 🖉 🗢



Manage Roles Screen: User Interface

There are two panels on the Manage Roles screen. The left panel displays a list of Available Roles, while the right panel displays a list of Assigned Roles. See Figure 11-15 for additional information about features displayed on the Manage Roles screen.

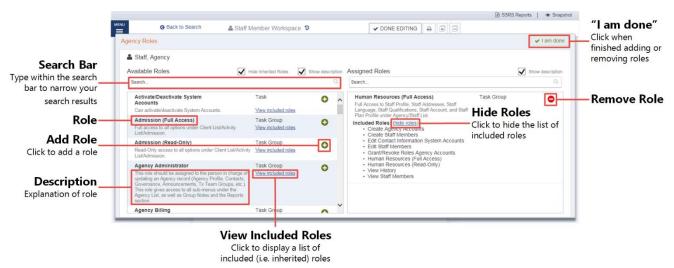


Figure 11-15: Manage Roles Screen

21. Use the Search bar to type the name of a role, or scroll through the list to find the correct role(s).

					SSRS Reports
O Back to Search 🔒 Staff M	ember Workspace	5		V DONE EDITING	
ency Roles					🗸 I am
Jones, Ashley					
Available Roles	Hide Inherited Roles	Show descript	on Assigned Roles		Show descr
Search		0	Search		
Activate/Deactivate System Accounts	Task	0	*		
Can activate/deactivate System Accounts.	View included roles				
Admission (Full Access) Full access to all options under Client List/Activity List/Admission.	Task Group View included roles	0			
Admission (Read-Only) Read-Only access to all options under Client List/Activity List/Admission.	Task Group View included roles	0			
Agency Administrator This role should be assigned to the person in charge of updating an Agency record (Agency Profile, Contacts, Governance, Announcements, Tx Team Groups, etc.). This role gives access to all sub-menus under the Agency List, as well as Group Notes and the Reports section.	Task Group <u>View included roles</u>	0			
Agency Billing	Task Group	0	-		

- 22. To add a role, click the green plus sign. To remove a role, click the red minus sign.
- 23. When finished assigning roles, click I am done.

Adding additional items to a profile

The remaining items under the Additional items section allow the user to customize the staff member's profile with relevant data.

Account Rules/Other Functionality

- **End Date**: Importance of End date This field drives a few things on screen; when someone has an end date, they will no longer appear in certain drop down boxes throughout the system.
- **Display Credentials**: When the "Include in Display Name" box is checked, the staff member's credentials will be displayed when they sign a note. This box can be found on different panels in the staff member profile.
- Professional Qualifications: In the Professional Qualifications panel, the staff member's licenses, degrees, and certificate information can be recorded. This information can also be included in the staff member's display name.

Professional Qualifications	~
Category:	
License × v	
Туре:	
Substance Use Disorder Counselor (SUDC)	
Issuer Name:	
Include in Display Name	
Effective:	
5/1/2015 🛗 🗕 🛗	
Has end date	
Save <u>Cancel</u>	
Profile	
	~
Jones, Ashley, SUDC	dan dan
Date of Birth:	S A
8	

Locking Staff Member Access

When a user's access to the system needs to be taken away for any reason, the Staff Administrator can "Lock" a user account. The Staff Administrator can reach the Lock Agency Access action in 2 ways.

Option 1: Staff Member Search Screen

1. From the **Staff Member Search Screen**, you can select the **Lock Agency Access** action from the list screen for the staff person you wish to lock.

	Q Staff Memb	er Search
Showi	ng 1-46 of 46	
	First Name	Last Name
ø	Admin	User
ø	System	User
A	Pre-WITS ligration	Process
ø	SSRS	Adm
Loci	Agency Access Rese	<u>Credentials</u> <u>View Profile</u>

Figure 11-16: Staff Member Search Screen, Lock Agency Access

Option 2: Edit Staff Member Account

From within the **Staff Member Workspace**, the Staff Administrator can Edit the workspace and use the User Account panel to select the **Lock Agency Access** action.

2. Click Edit.

	Staff Member Workspace 🤊	
Profile		*
0	Provider01, Training Unknown Date of Birth:	

Iser Account			
Jser ID: tprovider01	\longrightarrow	Lock Agency Access	Reset Credentials
ystem Roles: • Cross-Agency Waitlist Management (Full Access)			
Agency Roles Agency Billing Client Diagnosis (Full Access) Release To Billing 	Billing Encounter ListClinical (Full Access)		Manage role

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

Lock	
Lock Reason:	
This staff member is no longer employed at this agency. Access has been deactivated from MS-WITS.	<i>"</i>
Lock <u>Cancel</u>	

Figure 11-17: Lock Reason

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

	Back to Search	Staff Member Workspace 🦻		
Lock Agency Access was successful.				

- 26. This staff member can no longer gain access to WITS.
- 27. If for some reason, you want to release this lock, a Staff Administrator can get to the Release Agency Lock from the **Staff Member Search** screen or use the **Staff Member Workspace** User Account panel to **Release Agency Lock**.

ser Account			~
User ID: tprovider01		Reset Credentials	Release Agency Lock
System Roles:			
Agency Roles Agency Billing Client Diagnosis (Full Access) Release To Billing 	Billing Encounter ListClinical (Full Access)		Manage roles

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

Release Lock
Locked By: Leffler, Madeline Lock Reason:
A This staff member is no longer employed at this agency. Access has been deactivated from MS-WITS.
Release Lock Cancel

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

	Back to Search	Staff Member Workspace 🤊		
Release Agency Lock was successful.				

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

Employ	ment Profile				~
Job Title Admini	e: strator	Staff Member Type: Administrator Full Time Equivalent: Taxonomy Type:	Employment Type: Permanent	Employment Date Range: 10/01/2016 - 10/19/2017	1
Taxonon	ny Classification: ny Specialization:				

Appendices

ASAM CONTINUUM[™] Data Entry Conventions

The following are ASAM CONTINUUM[™] data entry conventions that users should familiarize themselves with BEFORE administering an ASAM CO-Triage [™] Screener or ASAM CONTINUUM[™] assessment. Review the ASAM CONTINUUM Product Line User Manual for in depth system nuances.

- All yellow questions are required and must be answered in each section and subsection
- All white questions are optional questions
- A green **Submit** button appears once all yellow questions in all sections and subsections have been completed.
- Information that you enter in the Drug and Alcohol summary section, will cause additional detail sections to be generated.
- For example if you select Alcohol as the only problem substance there will only be a detail section on Alcohol that needs to be completed.
- However, if you select Alcohol, Heroin and Other Substances, you will need to complete corresponding detail sections for Alcohol, Heroin and Other Substances.
- Save at the end of each screen.
- Once Submit is clicked, all questions and answers become read only and the CONTINUUM report is generated
- The optional Review Section appears in the CONTINUUM navigation panel for the user to complete if desired.

The CONTINUUM[™] assessment has multiple sections.

- The information at the top of the assessment came from information entered into the WITS Client Profile. If that information changes in WITS, it will be modified on the associated CONTINUUM[™] assessment.
- The left navigation outlines the various sections with associated questions that the clinician will review with the client.
- Buttons at the bottom of the assessment aid the clinician in navigating back and forth through the various sections of the assessments. These buttons appear in the CO-Triage Screener but are not used as it only contains 1 screen.
- As sections are updated, the software will track a completion percentage on each section as well as an overall completion percentage. Sections that are complete will show a green checkmark.
- Once the clinician completes the assessment, a **Submit** button will appear at the bottom navigation. When the **Submit** button is clicked, the assessment is scored and the report is generated.

ASAM CONTINUUM THE ASAM CRITERIA DECISION ENGINE	Minnie Mouse Birth Date: 10/19/2000 Gender: Female Religion: Other Ethnicity: Undeclared Created By: Ferrante, Maria				
	General Information		^		
General Information	Class of Assessment	Intake 🗸			
General Information 100%	This interview was conducted	By mail 💌			
Medical History	Special Interview Circumstances	Patient unable to respond			
Drug and Alcohol	88 "How long have you lived at your current address?"	Years Months			
 Legal Information Family and Social History 	"Is this residence owned by you or your family?"	Yes No			
Psychological	8 "Have you been living in a hospital, rehab, jail or other				
Interview Completion	controlled environment within the past 6 months? In the past month? How many days ago did that end?"				
	Has patient been in penal or chronic care setting within the past 14 days or is the patient within 6 months after release from such a setting?	Yes No			
	Intake Notes		~		
Terms and Conditions	<prev next="" save=""> Cancel</prev>		Submit		