Focused eHealth Innovations

Web Infrastructure for Treatment Services (WITS)

WITS Module Documentation for:
Linked Consents for ME SAMHS

Prepared by:
FEi Systems
9755 Patuxent Woods Drive, Suite 300
Columbia, Maryland 21046
TEL: 443-270-5101
FAX: 410-715-6538
www.feisystems.com

Prepared For:
WITS User Group

Table of Contents

A. Overview

Purpose

Linked Consent feature was developed in order to allow better management of client records across Agencies, and to be able to integrate consented records into client records rather than having them accessible only through the Client Search screen. These features will allow users to manually create a link between two client records in order to indicate that they are the same person, and will also allow for the "filing" of consented activities into the client record.

Roles

<u>Clinical Supervisor</u>

Responsibilities:

1. Be able to confirm that two different client records do or do not refer to the same individual
2. Link or unlink those client records

<u>WITS Administrator</u>

Responsibilities:

1. This role has the same access as the Clinical Supervisor role for the purposes of this feature.

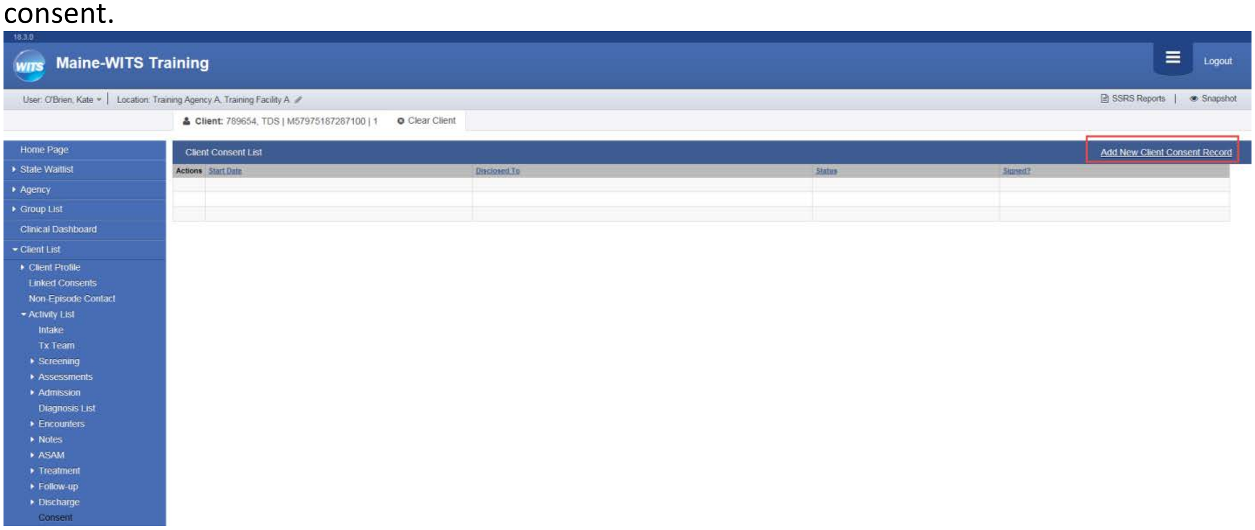
B. Workflow – Consent and Referral

Consent & Referral processes, for Training Agencies A and B. In this scenario, the Client does not already exist in Training Agency B.

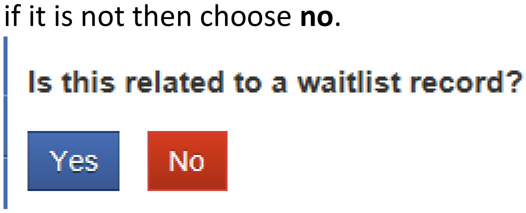
Figure 1: Client Profile exists in Training Agency A

Figure 2: Consent is created from Training Agency A to Training Agency B

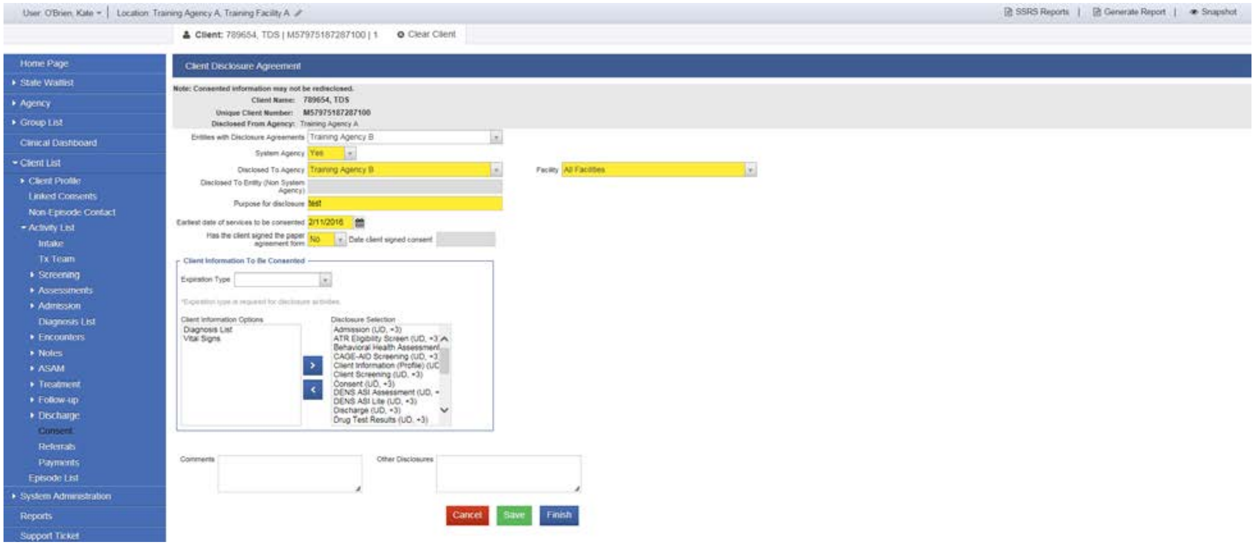
Click on **Consent** from the left-hand navigation menu. You will then see the **Client Consent List** screen for that client. Click on the **Add New Client Consent Record** link to create a client consent.



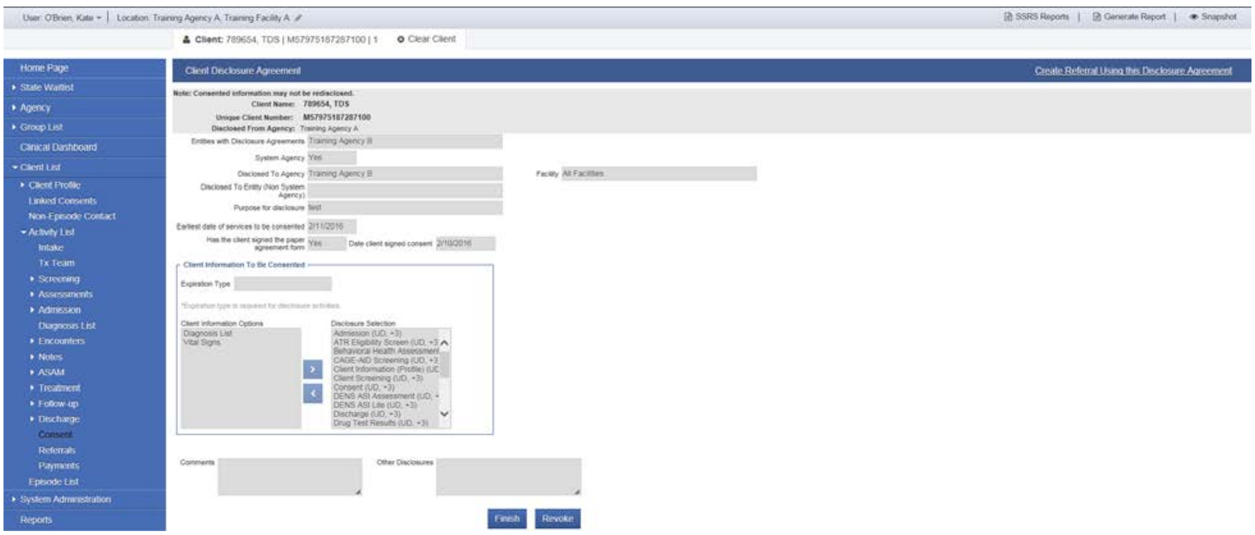
You will be prompted with the "Is this related to a waitlist record?" question. If it is choose **yes**, if it is not then choose **no**.



Complete all necessary fields and click **Save**.



Once you click the **Save** button the consent is read only. You can then either **Finish** or **Revoke** the consent.



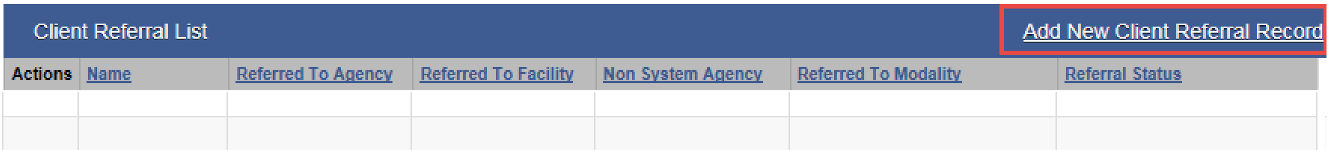
You will now see the consent in the **Client Consent List**.

Client Consent List — Add New Client Consent Record

Actions	Start Date	Disclosed To	Status	Signed?
✎	2/11/2016	Training Agency B	Active	Yes

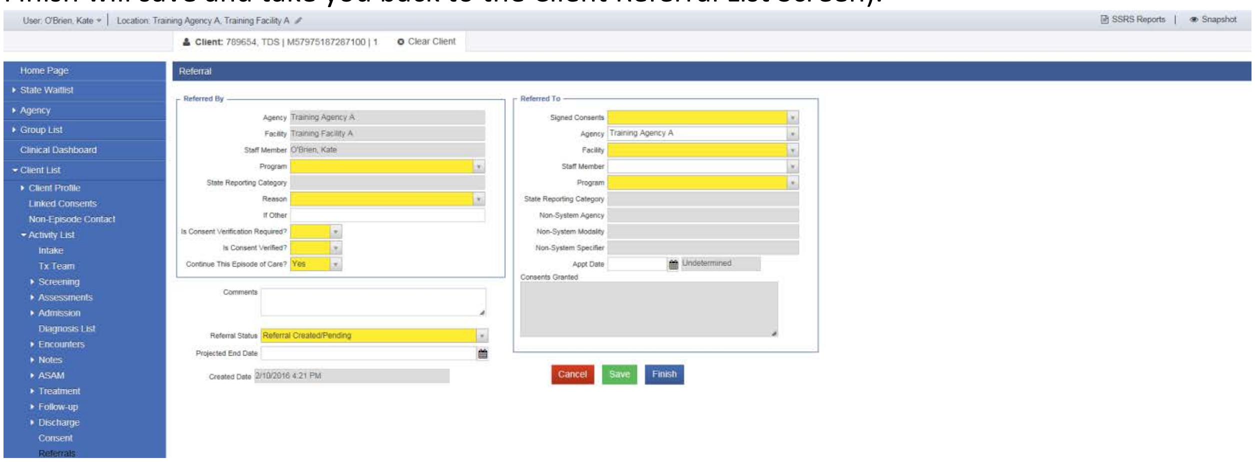
Figure 3: Referral is created from Training Agency A to Training Agency B

Click on **Referrals** from the left hand navigation menu. You will be taken to the **Client Referral List** screen. Click on the **Add New Client Referral Record** link to create a referral.


Client Referral List — Add New Client Referral Record

Actions	Name	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Status

Fill in all necessary/required fields and click Save or Finish (Save will keep you on that screen, Finish will save and take you back to the Client Referral List Screen).

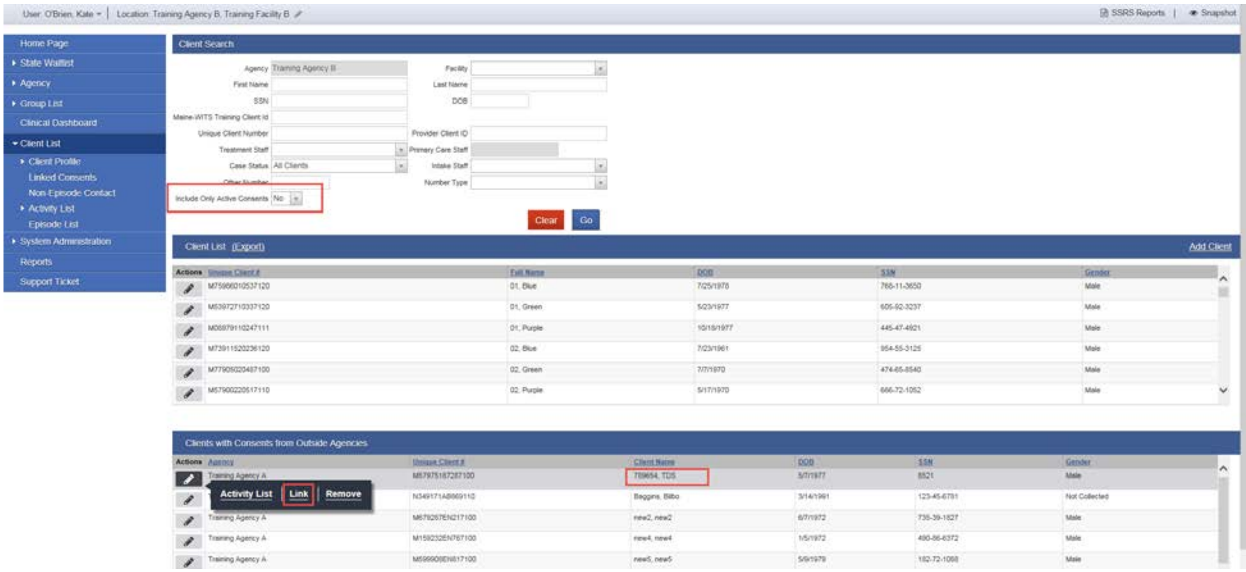



Client Referral List — Add New Client Referral Record

Actions	Name	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Status
	789654, TDS	Training Agency B	Training Facility B		Ambulatory- Non-Intensive Outpatient	Referral Created/Pending

Figure 4: Training Agency B Client List, Prior to Accepting Referral from Training Agency A

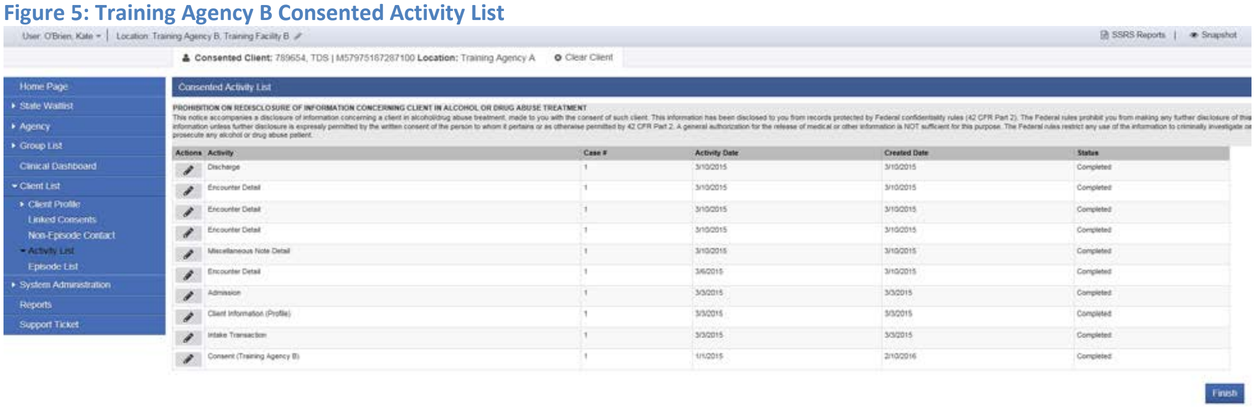
Click on **Client List** from the left-hand navigation menu while in Location: Training Agency B, Training Facility B to see a list of the consented clients into Training Agency B (note that there is a filter on this screen to filter out active and non-active consents. If you do not see the consented client this may be why).



In Training Agency B, a search for the client from Training Agency A shows that the client has consented information, but does not already exist in Agency B. For the purposes of this scenario, we are assuming that the client does not exist in Agency B under another name, either.

Note that if you have the Clinical Supervisor or the WITS Administrator role, you will see the "**Link**" option in the Actions column.

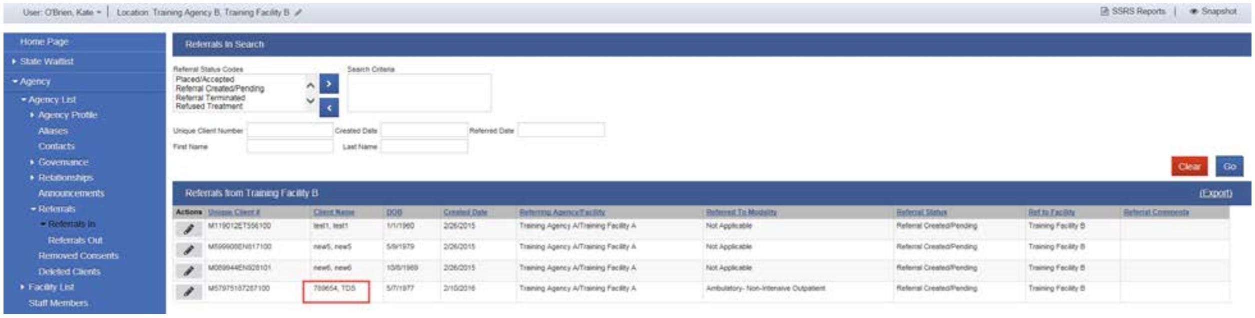
Figure 5: Training Agency B Consented Activity List



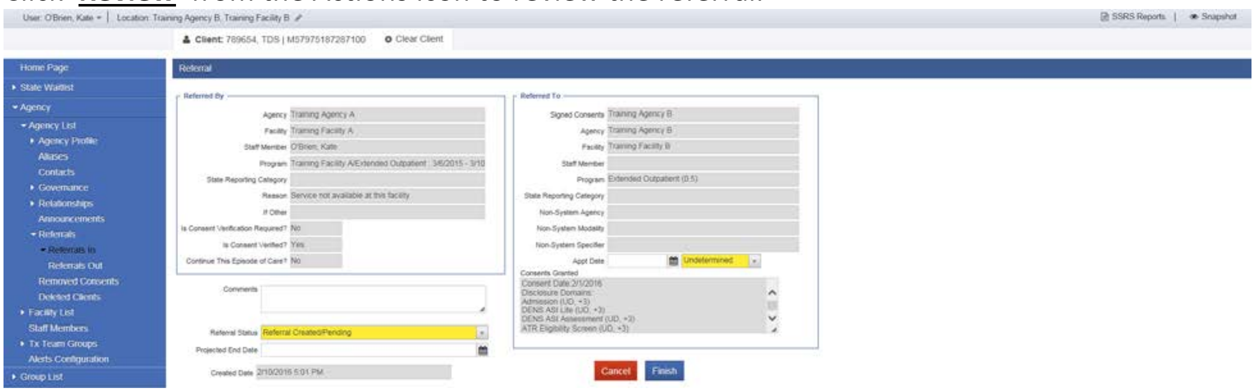
If you select the "**Activity List**" action link, you will be able to see the information that Training Agency A has shared with Training Agency B.

Figure 6: Accepting Referral from Training Agency A to Training Agency B

Click on **Referrals** (under Agency) on the left hand navigation menu. Here you can see clients referred in and out of your agency. There are several filters at the top of the screen to search by. Click Go and a list of Referrals will populate on the bottom of the screen.



Click '**Review**' from the Actions icon to review the referral.



Change the referral status to '**Placed/Accepted'** to accept the referral from Training Agency A into Training Agency B. Once you do this and click **Finish**, you will be taken to the Client Profile screen for this client.

Figure 7: New Client Profile in Training Agency B

Accepting the referral creates a new client profile in Training Agency B, since the client did not yet exist in Training Agency B.

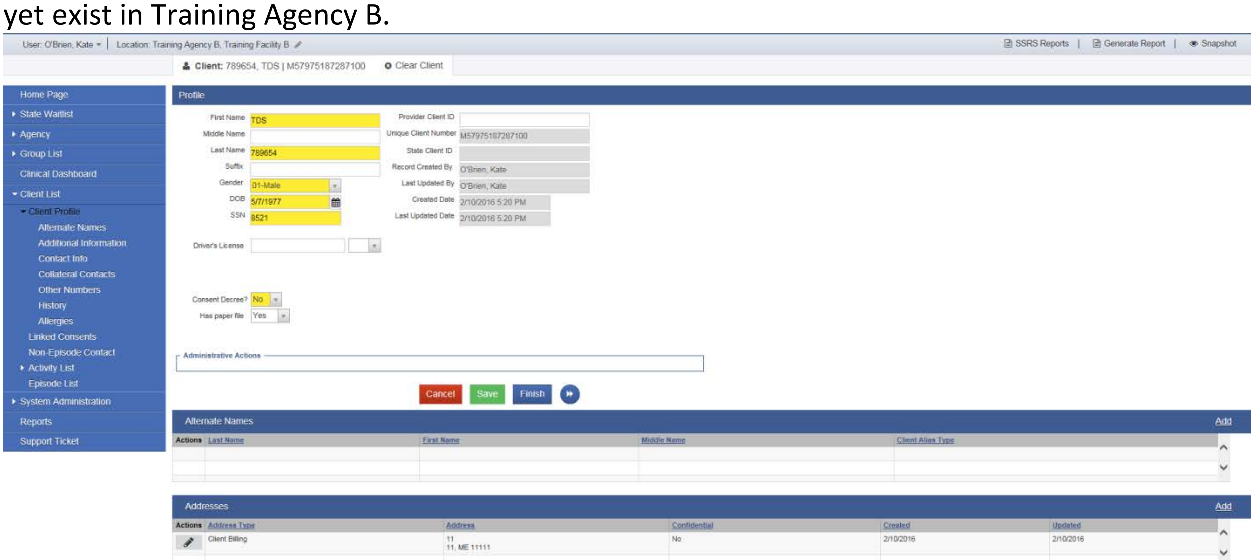
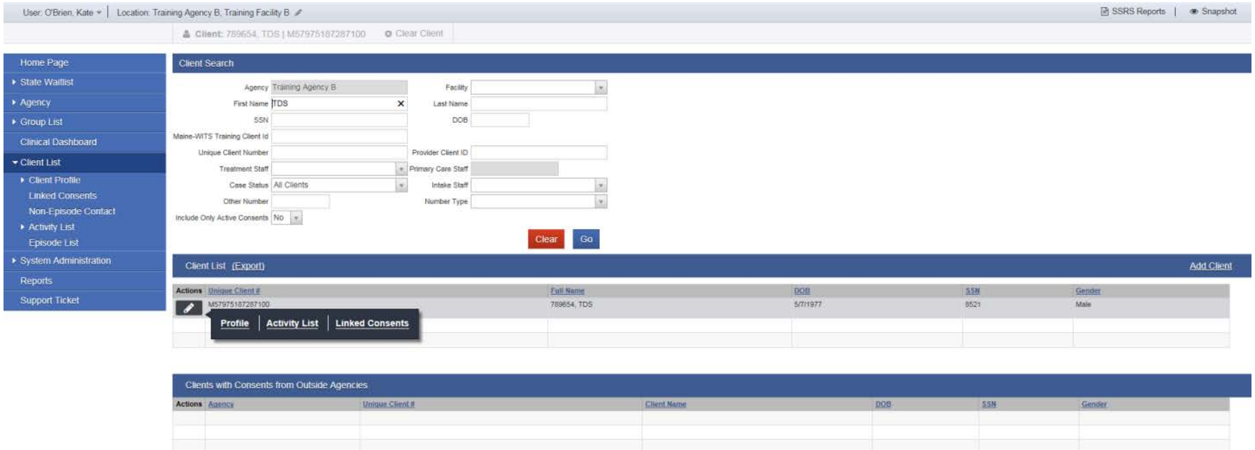


Figure 8: Client List in Training Agency B, After Accepting Referral



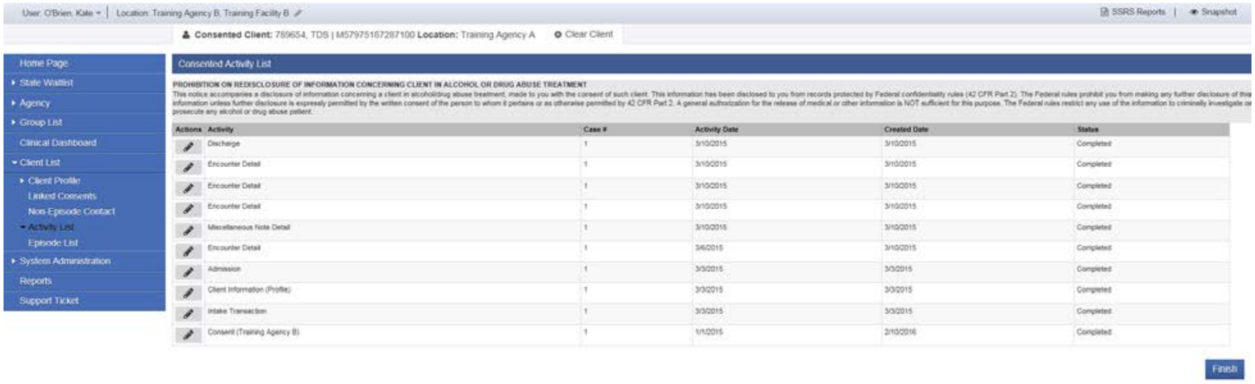
The clients consented information from Training Agency A no longer appears on the Clients with Consents from Outside Agencies list.

Note instead the Action link for “**Linked Consents**” on the Client List listing for the client.

Figure 9: Linked Consents in Training Agency B

Selecting the “**Linked Consents**” Action link on the Client List will bring you to the **Linked Consents** screen.
If there were multiple Consents for this client from different Agencies, you would be able to filter the list based on Agency.
Note the “**Add Link**” feature in the **Linked Consent List** header. This only appears for the Clinical Supervisor and the WITS Administrator.
To view the Consented Activities, select the “**Activity List**” Action link.

Figure 10: Consented Activity List from Training Agency A, in Training Agency B



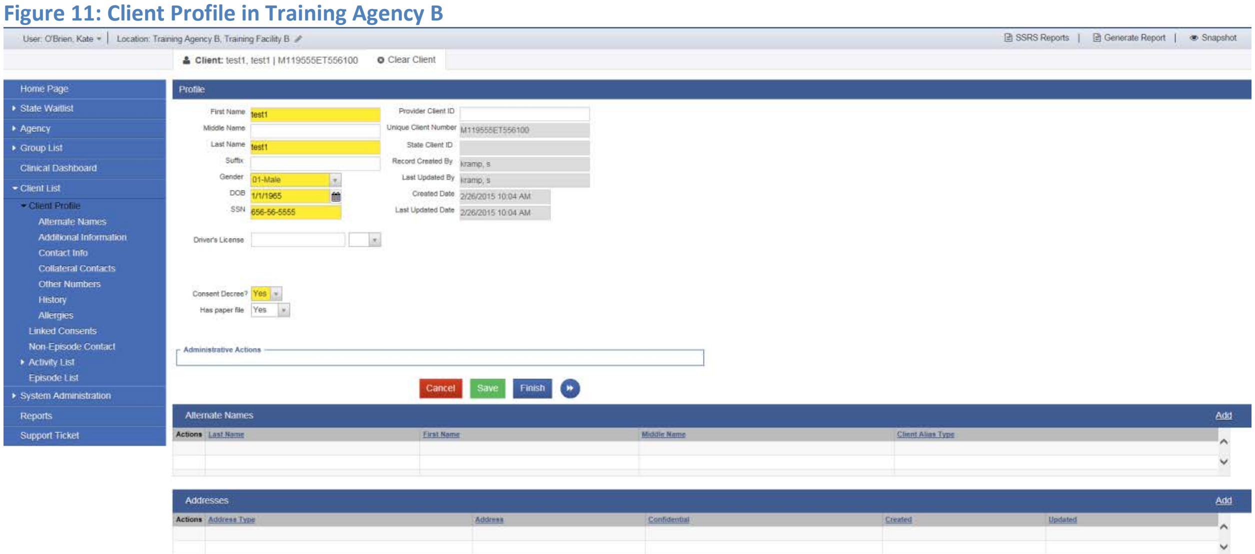
The Client's Consented Activities from Training Agency A have been effectively removed from the **Clients with Consents from Outside Agencies** list, to become available instead through the **Linked Consents** menu item under the Client Profile.

C. Workflow – Linked Client

This shows the workflow for Client records and the Consent & Referral processes for Training Agencies A and B when Client records are for the same client and linked. In this scenario, the client already exists in Training Agency B under another client ID. The same consent and referral process would take place as above.

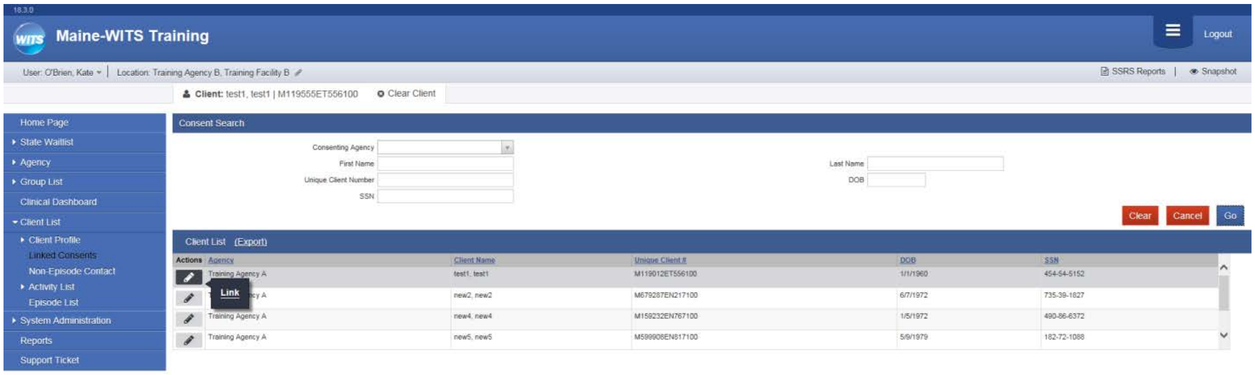
The Clinical Supervisor may know that these two clients (in Training Agency B and Training Agency A) are the same person and therefore wants to link the records.

Figure 11: Client Profile in Training Agency B

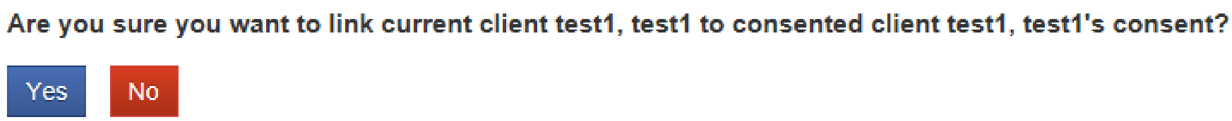


In this Client Profile, you can see that the client has a few different demographics (such as DOB) than the client in Training Agency A.

You can link this client record to another client record by going to **Linked Consents** on the left hand navigation menu under **Client Profile**, choosing **Add Link**, and then choosing the **<u>Link</u>** action icon. You will now be able to search for the client record you would like to link.



You will be prompted with a question asking if you are sure you want to link the two client records



Once you click **Yes**, you will see the linked consent of the other client record in the **Linked Consent List** screen for the client record you are in.

You are able to unlink the two records by clicking the **Unlink** action icon.