MAINE-WITS Provider User Guide

Provider User Guide

WITS

FEi Systems

May 2015

Contents

Introduction

WITS is a web based application specifically designed for the State of Maine to effectively manage substance abuse treatment data collection and clinical functions. WITS comes with core clinical features essential to managing substance abuse recovery services and treatment case management.

This provider user guide has been prepared for those working within SAMHS. Today, your account is set up based on your job function. WITS has many permissions based on roles, and SAMHS can help you restrict users in your agency and their access to data in several different ways. Ask your SAMHS WITS Administrator for more information.

SAMHS Help Desk Contact Information

stacey.chandler@maine.gov

(v) 287-6337

(f) 287-8910

Before Reading

View the WITS Basics User Guide before reading this document. The WITS Basics User Guide covers important topics including basic navigation features, system conventions, and login information.

Section 1. Client Profile

Where:* *Client List > Client Profile

Searching for a Client

WITS has powerful search features which allow you to perform either broad or granular searches. However, it is important to search thoroughly for clients in order to reduce client duplication.

To search for a client in WITS refer to the left navigation menu and click on the **Client List** link. A blank Client List screen will appear. WITS will search for clients based on any fields you complete; the more information you enter, the narrower you make the search. Try to use unique information, such as birthdates or social security numbers, if possible. After you enter your search criteria, click **Go**. The system will return any records that match your search criteria. If no fields are entered in the search screen, a full client list will be returned. When searching for TDS clients, entering more identifying client information will create a granular search and maker identifying your TDS client easier.

Wild Card Search:

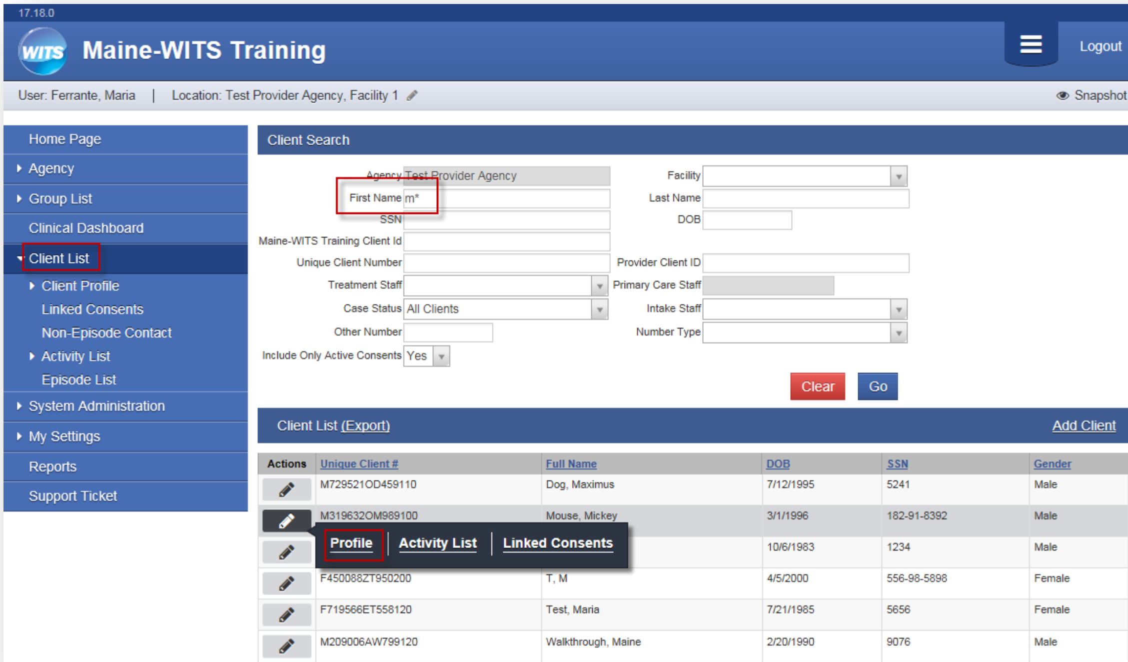
You can also perform a wild card search by entering a partial name (or other field) with the use of an asterisk (*).

> To search for a name (or other field) that **begins** with a letter or number, enter the beginning of the text (e.g. "Smit") and then an asterisk (e.g., "Smit*"). This will display "Smith", "Smitty", "Smithson", or any entry that begins with "Smit".

To search for a name (or other field) that **contains** a letter or number, enter an asterisk (*), then any part of the letter or number (e.g. "123-45-6789"), and end with another asterisk (*). For example"*6789*" will display any entry with "123-45-6789" in the field.

To search for an existing client, conduct the following steps:

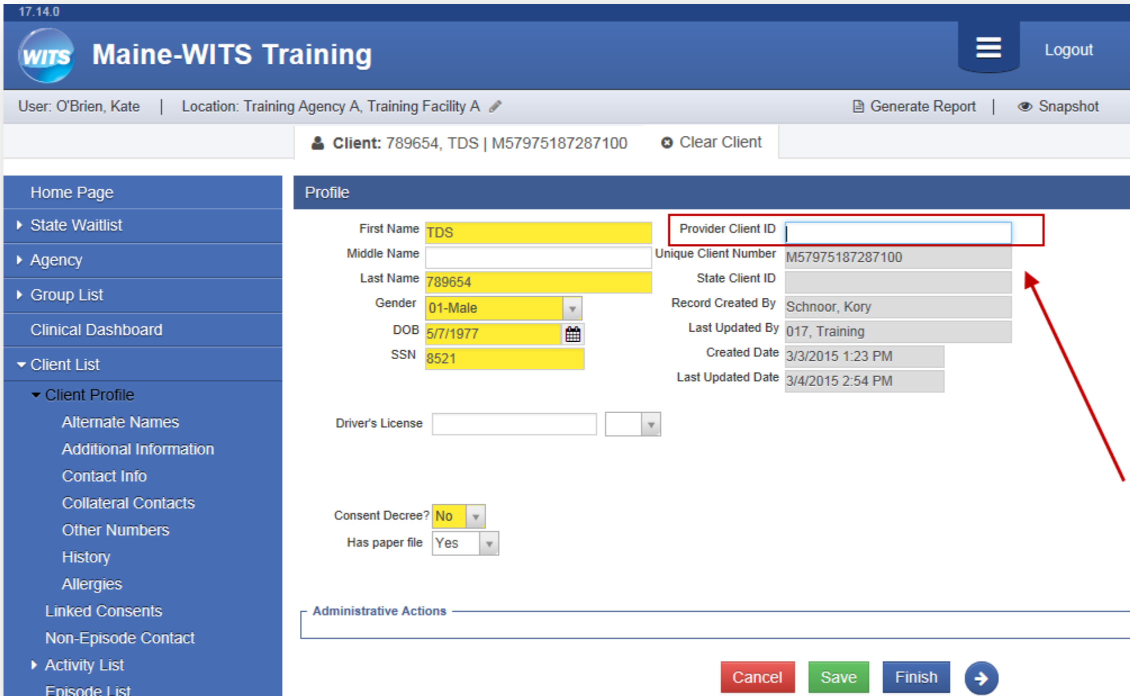
1. On the navigation menu, click **Client List.**
2. Use any search parameter on the Client Search (see below) to limit the search for the client you are looking for.
3. Click **Go**.



4. Once you find the correct client, view their profile by hovering over the pencil icon under the Actions column and clicking on **Profile** next to their name.

To search an existing <u>TDS client</u>, conduct the following steps:

1. On the navigation menu, click **Client.**
2. Use either of the following Search Fields:
    a. **Last Name**: Leave blank
    b. **First Name**: Enter "TDS"
    c. **SSN**: Enter the entire SSN or last 4 digits of the SSN
    d. **DOB**: Enter the client's Date of Birth
    e. **Provider Client ID**: This will contain the TDS client number
3. Click **Go**.
4. Once you find the correct client, pull up the profile by clicking on **Profile** next to their name under the Actions column (any client record can be updated).
5. If there are potential duplicate clients, the system will return those results in a list screen.

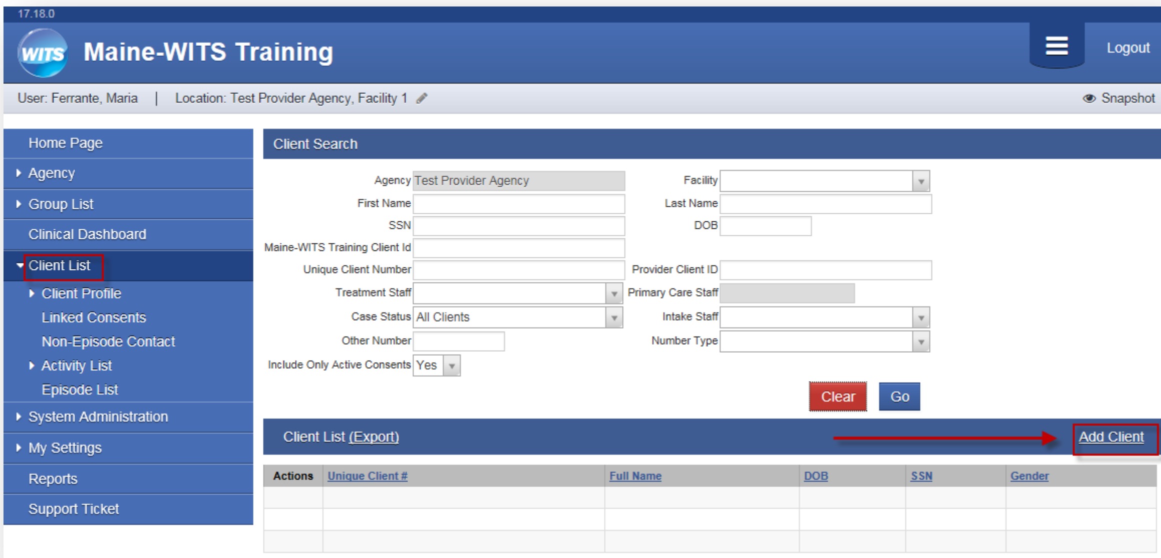


NOTE: The TDS Number will be the **Provider Client ID** in the WITS System, so you can use the **Provider Client ID** field to search for the TDS number in the **Client Search** screen. Once you have found the client, you can update the last name field with the **last name or last name initial** if you choose to do so. It is recommended to keep the TDS Number in the **Provider Client ID** field. This will allow the user to keep the TDS number associated with the client's profile in WITS as well as allow the user to enter the actual last name or last initial of the client and search on those identifiers in the future.

Adding a New Client

After performing a search if you cannot find the client you are looking for the next step would be to add a new client in WITS. To add a client, make sure that you are in the client list screen by clicking on the **Client List** link in the left hand navigation menu.

1. From the **Client List** screen, click on the **Add Client** link. The client profile screen will then appear.

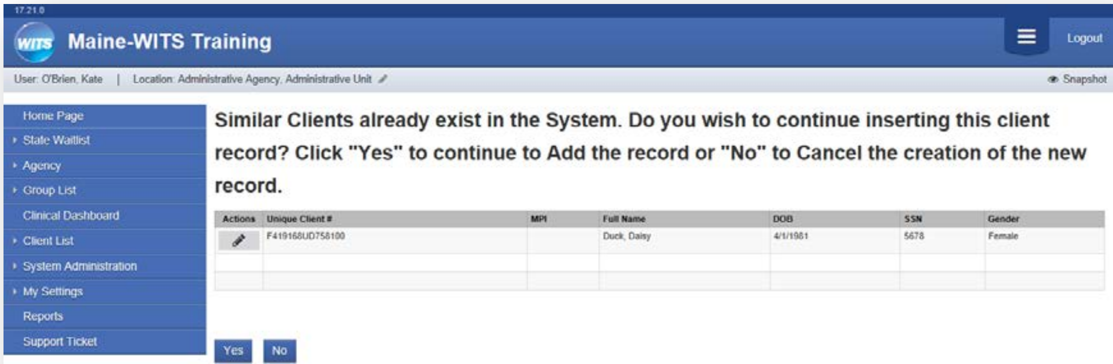


Client Profile Screen:

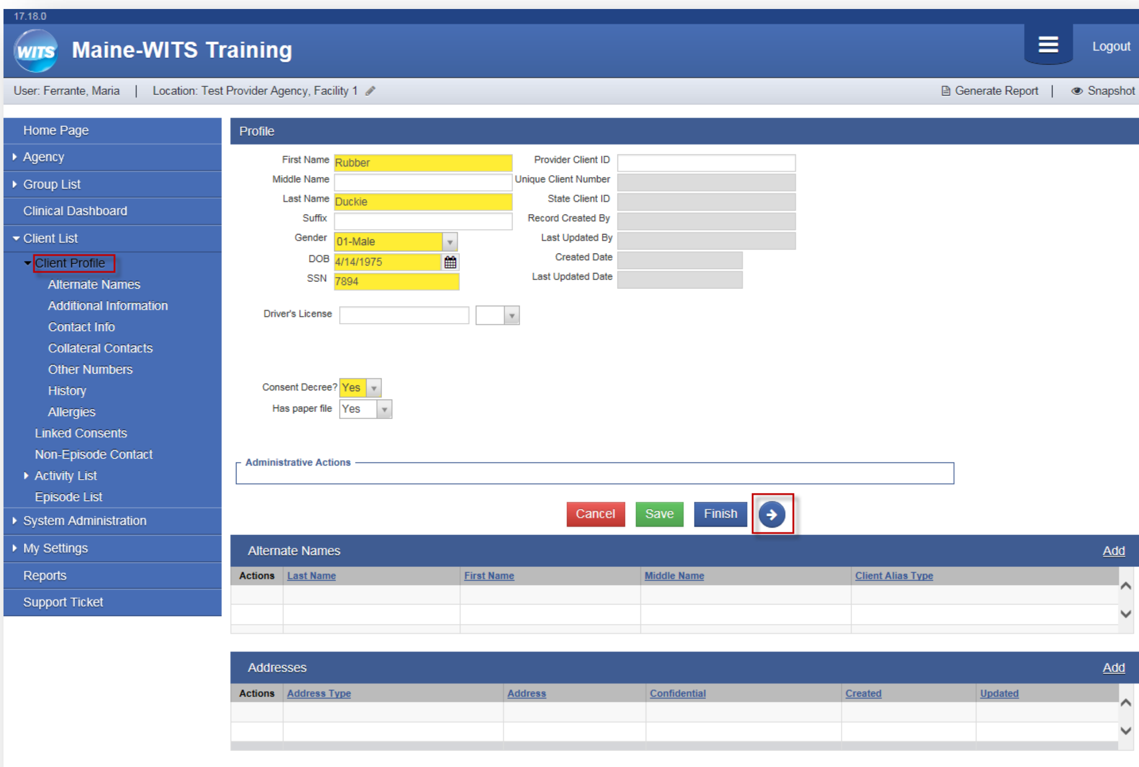
2. In the **Client Profile** screen, enter all required (yellow fields) client information including **First Name/First Initial**, **Last Name/Last Initial**, **Gender**, **DOB**, **SSN** (only the last 4 are required) and **Consent Decree**.
3. To complete your entry, click **Save** and use the **blue arrows** to navigate to the **Alternative Names Screen.**

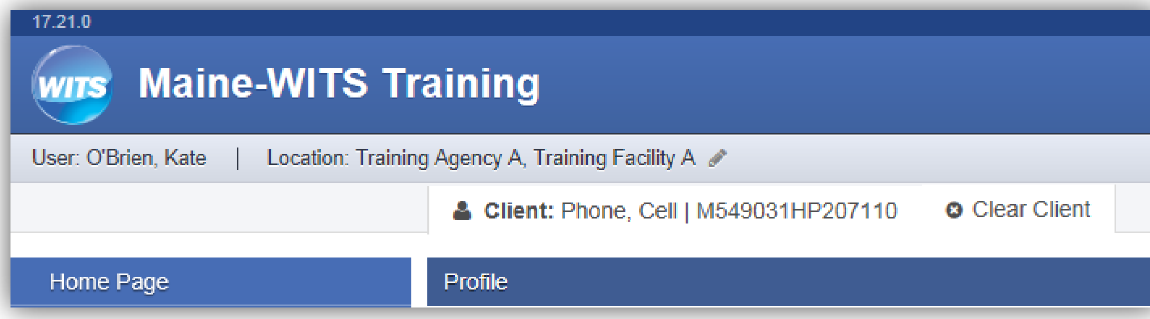
   Note: If you click **Finish**, you will be taken out of the **Client Profile**, to the **Client List** screen, however, there are light yellow state reporting fields on the **Additional Information screen** which need to be completed).

4. If there are similar clients as the one you created that exist in the system, the system will prompt you with a message:



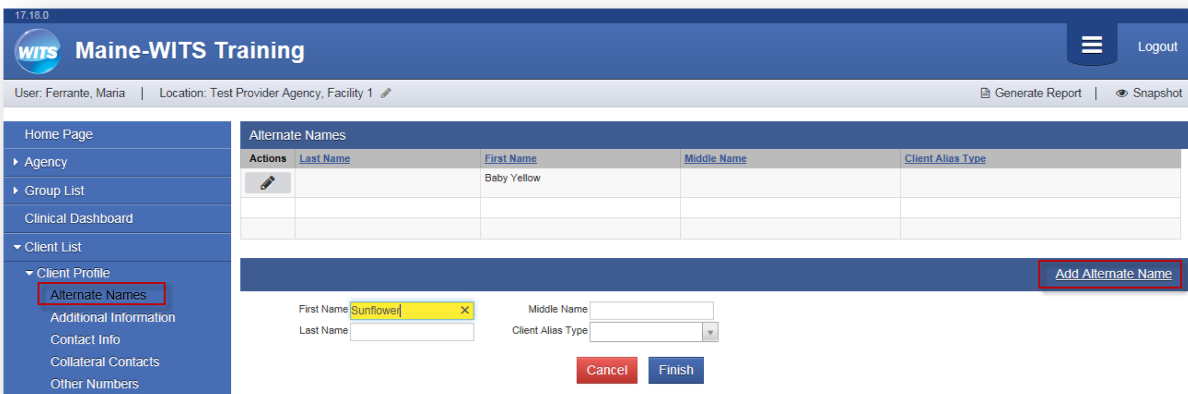
5. The unique Client ID has now been created for this client. The unique Client ID is based on the client name, DOB and SSN. It is important that the client information is entered properly the first time, as this will help to avoid duplicate entry of clients in the future.




17.21.0
Maine-WITS Training
User: O'Brien, Kate | Location: Training Agency A, Training Facility A
Client: Phone, Cell | M549031HP207110
Clear Client
Home Page
Profile

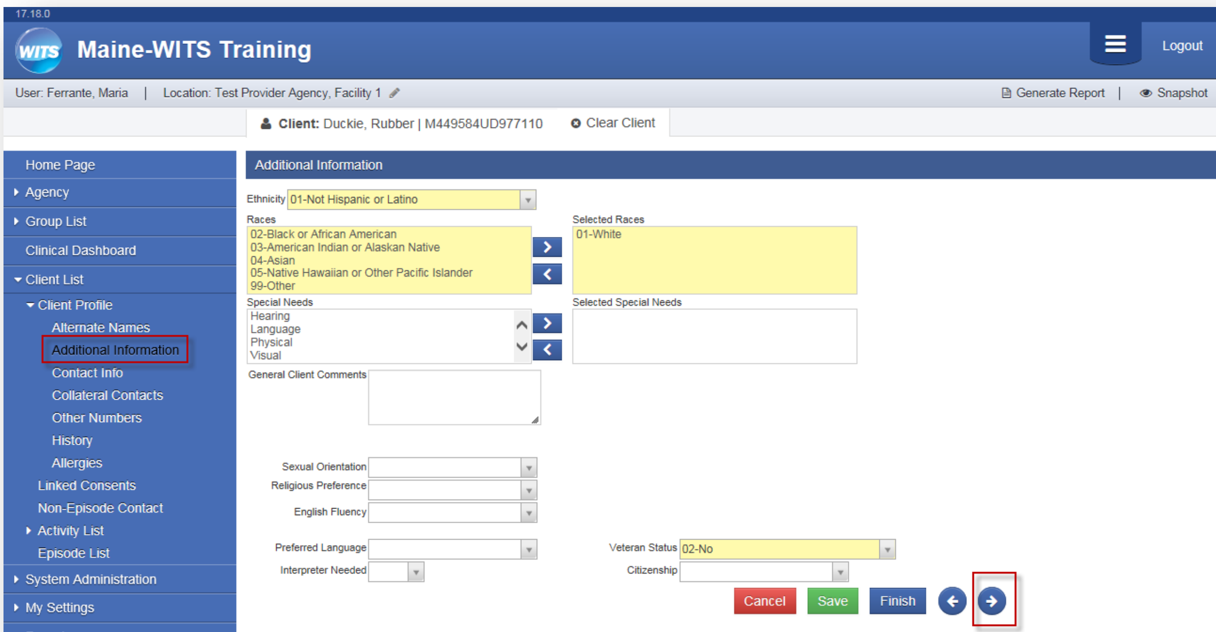
Alternate Names Screen:

6. To add an Alternate Name or alias the client goes by, **click** on the **Add Alternative** Name on the right hand side of the page.
7. When you click on the **Add Alternate Name** link, the bottom half of the screen becomes editable. Fill in the **First Name**, as well as the optional **Last Name** and **Middle Name**.
8. The client's nickname or street name may be entered here. You will be able to use this alternate name to search for this client on the **Client List** screen.
9. When complete, click **Save** or **Finish**. The names now show up in the list on the top of the screen.
10. **Click** on the **right arrow** button to continue to the **Additional Information** screen.



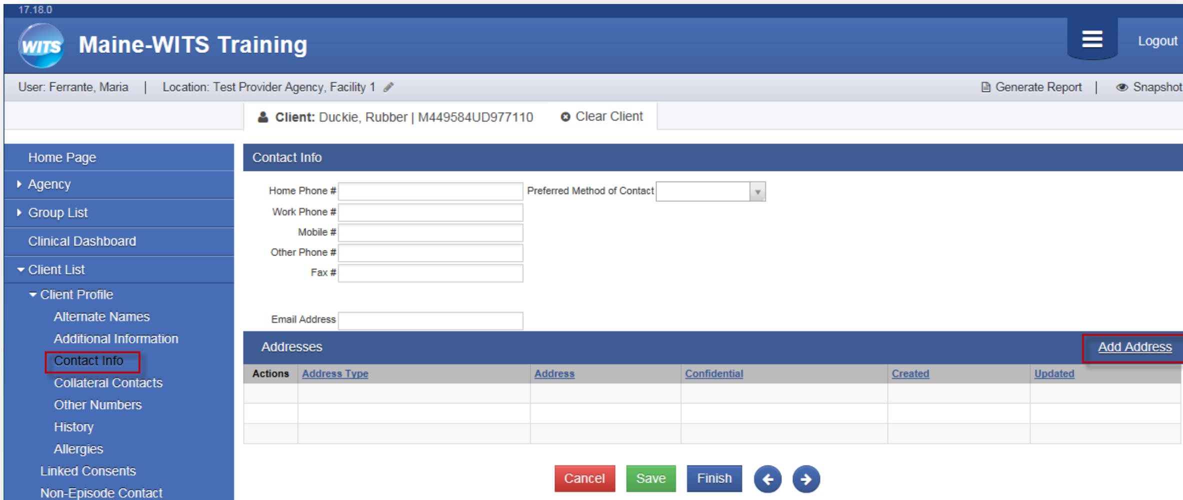
Additional Information Screen:

11. After completing the Alternative Names screen the **right arrow** button takes you to the **Additional Information** screen. This allows the user to capture demographic information regarding the client.
12. Select an **Ethnicity** from the drop down.
13. Select a **Race/Races** from the mover box and click on the arrow button to move your selection to the **Selected Races** box.
14. Select a value for **Veteran Status** from the dropdown.
15. You can fill in other details on the screen such as **Tribe**, **Special Needs**, **Comments** etc., but you only need to fill in the light yellow fields for state reporting (white fields are optional).
16. **Click** on the **right arrow** button to continue to the **Client Info screen**.

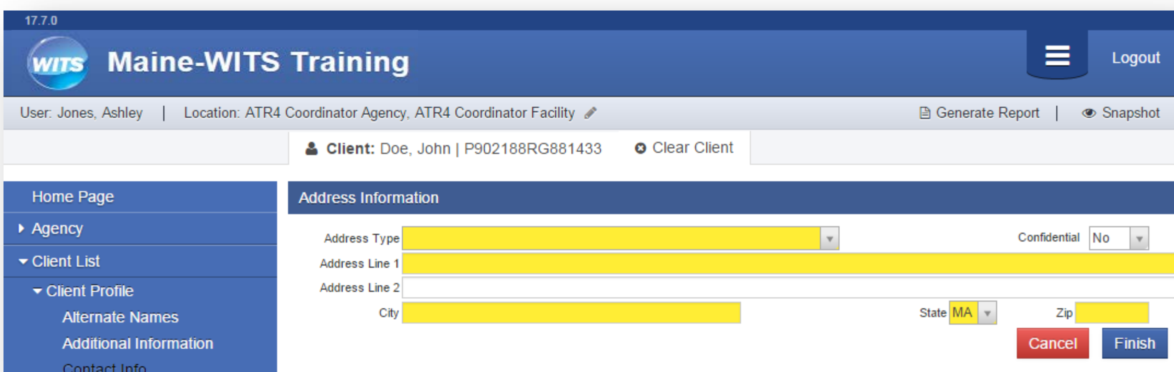


Contact Info Screen:

17. After completing the **Additional Information** screen the right arrow button takes you to the **Contact Info** screen. To add an address **click** on the **Add Address** link.



18. The **Address Information** screen opens. Complete the **Address Type**, **Address line 1**, **City**, **State**, and **Zip Code**.



19. When complete, click **Finish**. This takes you back to the **Contact Info** screen where you will see the address populated. You may enter several addresses for a client.
20. Click on the **right arrow** button to continue entering client information.

Collateral Contacts Screen:

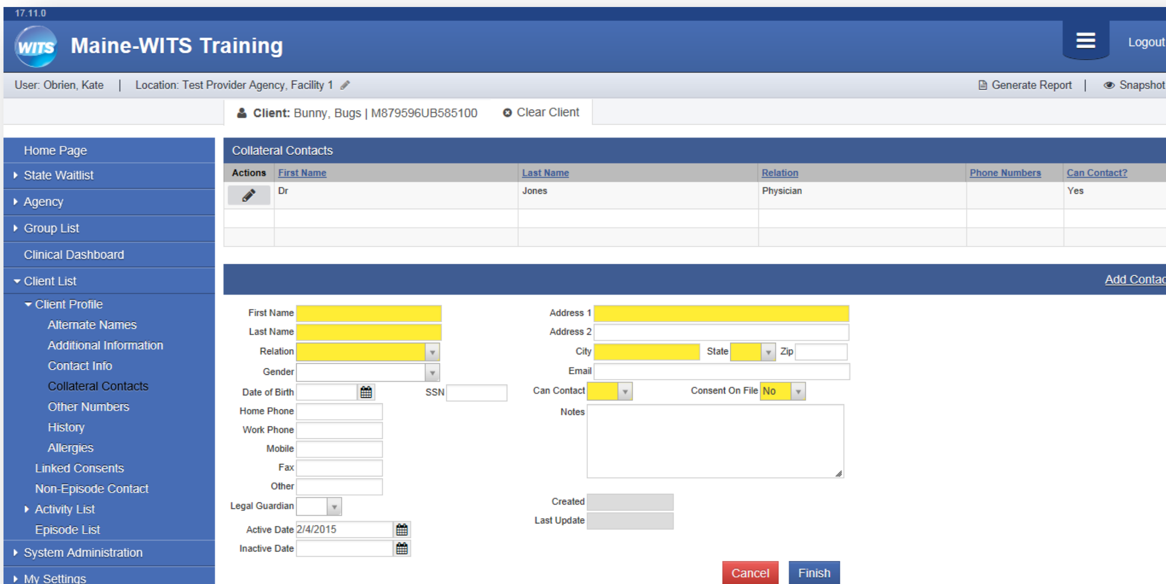
21. When you click on the **right arrow** button, you are taken to the **Collateral Contacts** screen. To add a collateral contact click on the **Add Contact** link.

22. Collateral contacts are used to gather information about other people involved in the client's life in case you need to get in contact with the client (i.e. probation officer, parents etc.)

23. The bottom half of the screen now becomes editable. Complete the required collateral contact information for the client such as **First Name**, **Last Name**, **Relation**, **Address 1, City, State, Can Contact,** and **Consent on file**.

24. When complete, click **Finish**. The name now shows up in the top table under the Collateral Contacts list.

25. Click on the **right arrow** button to continue entering client information.



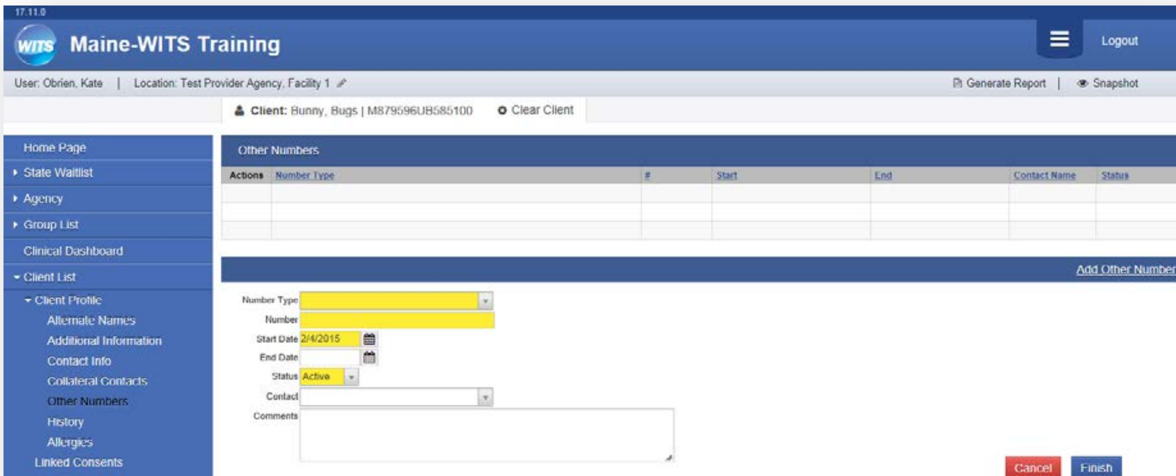
Other Numbers Screen:

26. After completing the Collateral Contacts screen the **right arrow** button takes you to the **Other Numbers** screen. Click on the **Add Other Number** link.

27. **Other Numbers** is a great way to record numbers, such as case numbers, prior CED numbers, etc. for the client. These numbers are searchable items on the client search page.

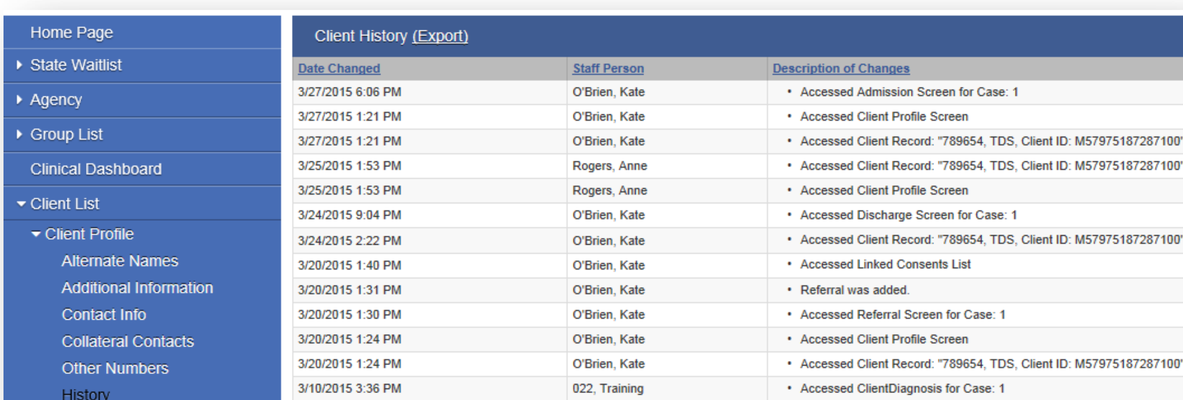
28. The bottom half of the screen now becomes editable. Fill in information such as **Number Type**, **Number**, **Start Date,** and **Status.**

29. When you click on the **Contact** dropdown box you can see the names of the **saved Collateral Contacts** from the previous screen. If the name of the Collateral contact is not present, you can add a new contact by clicking on the **Add Contact**. This takes you back to the **Collateral Contacts** screen.
30. When complete, click **Finish**. The **Numbers** now show up in the table on top of the screen.



History Screen (reference only):

The History Screen is a reference screen which shows a date and timestamp of anyone that may have access the client's record and whether the record was edited or not.



Section 2. Intake

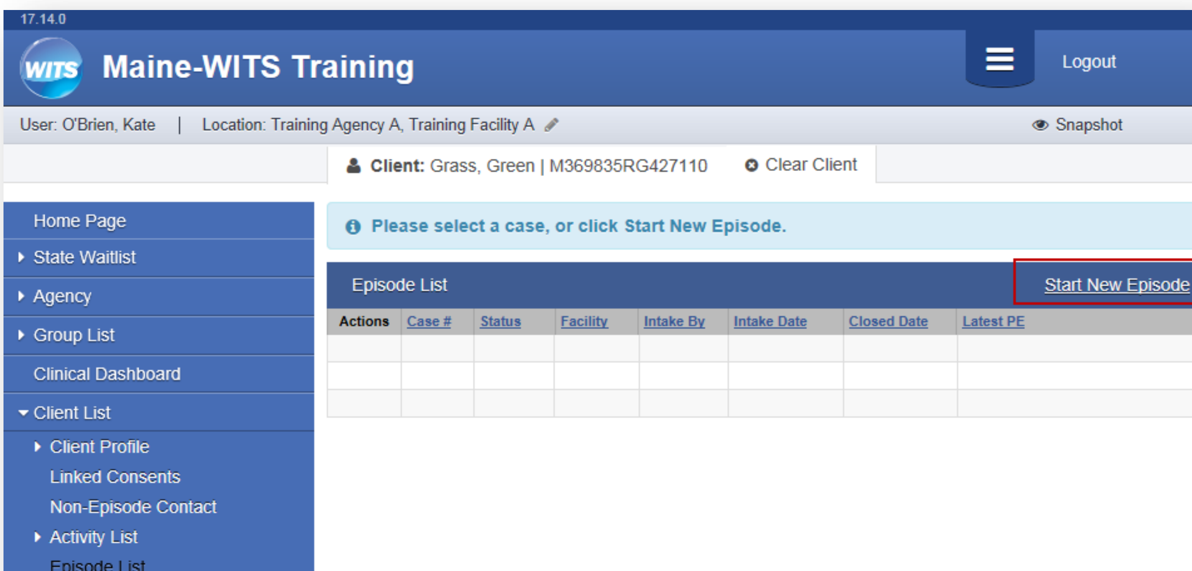
***Where:* Client List > Activity List > Intake (Episode)**

In WITS, all activities are based upon an active episode of care, which is started by an intake. You must do an intake to perform any client activities in the system. After completing an intake the next step is to complete an admission.

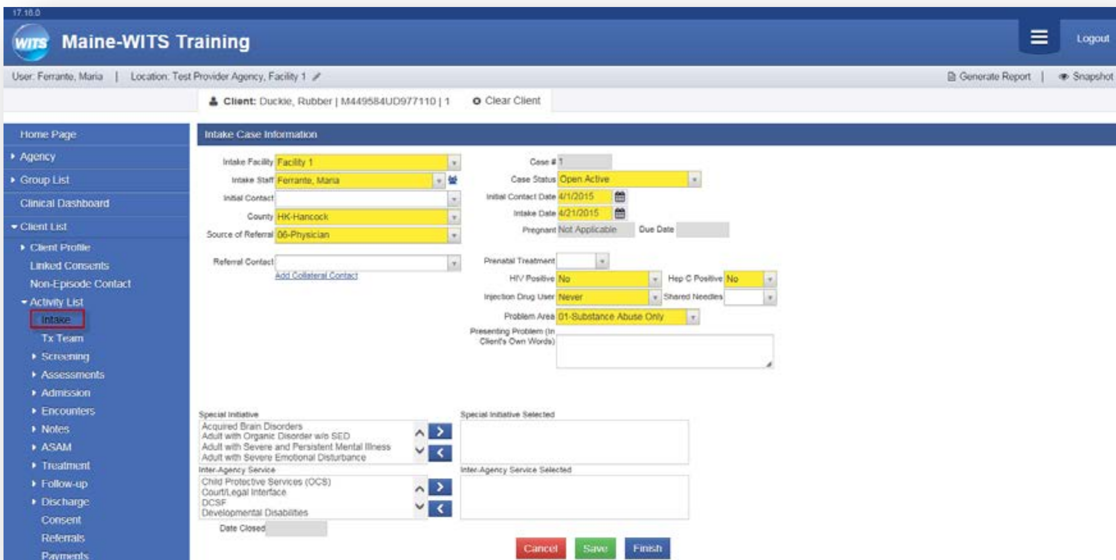
Creating a Client Intake

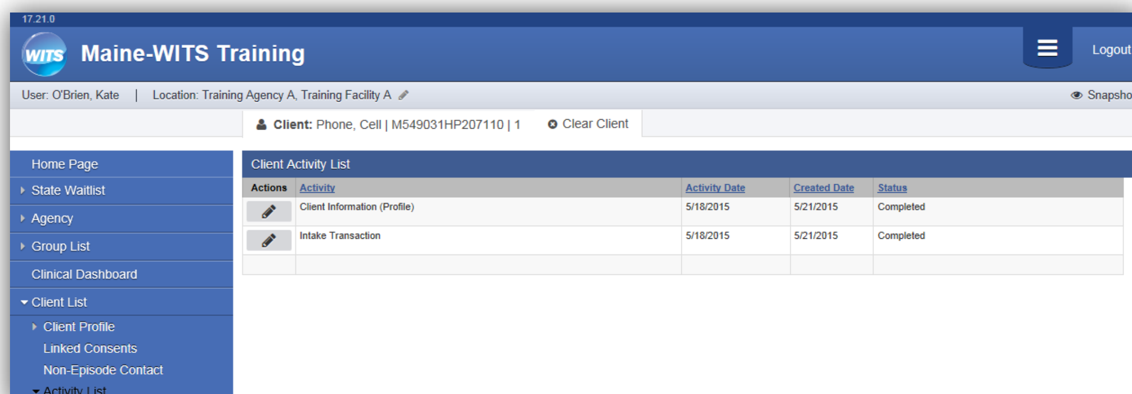
When creating an intake, make sure that you have selected the correct client, as everything you do in the intake will be applied to the client record chosen. To continue, click on the **Activity List** link located in the left navigation menu OR from **Client List**, search for the client and click on **Activity** list under the actions column. You will then see the Episode List Screen, which is where you can see all closed or existing episodes. The intake screen will only be used at the beginning of an episode.

1. Click on **Start New Episode** link, and the **Intake Case Information** screen will appear.



2. Complete all required fields:
    a. **Intake Facility**: Select the facility where the intake is being performed facility from the Intake Facility drop down list; **Intake Staff**: Select the staff member preforming the intake; **County ; Source of Referral ; Case Status** (defaults to Open Active); **Initial Contact Date; Intake Date** (defaults to today's date); **HIV Positive; Hep C Positive; Injection Drug User; Problem Area**
3. Complete all required fields in order to save (the **Pregnant** field will be required if the client is a female)
4. When complete, click **Finish**. You will be taken back to the **Client Activity List** screen.

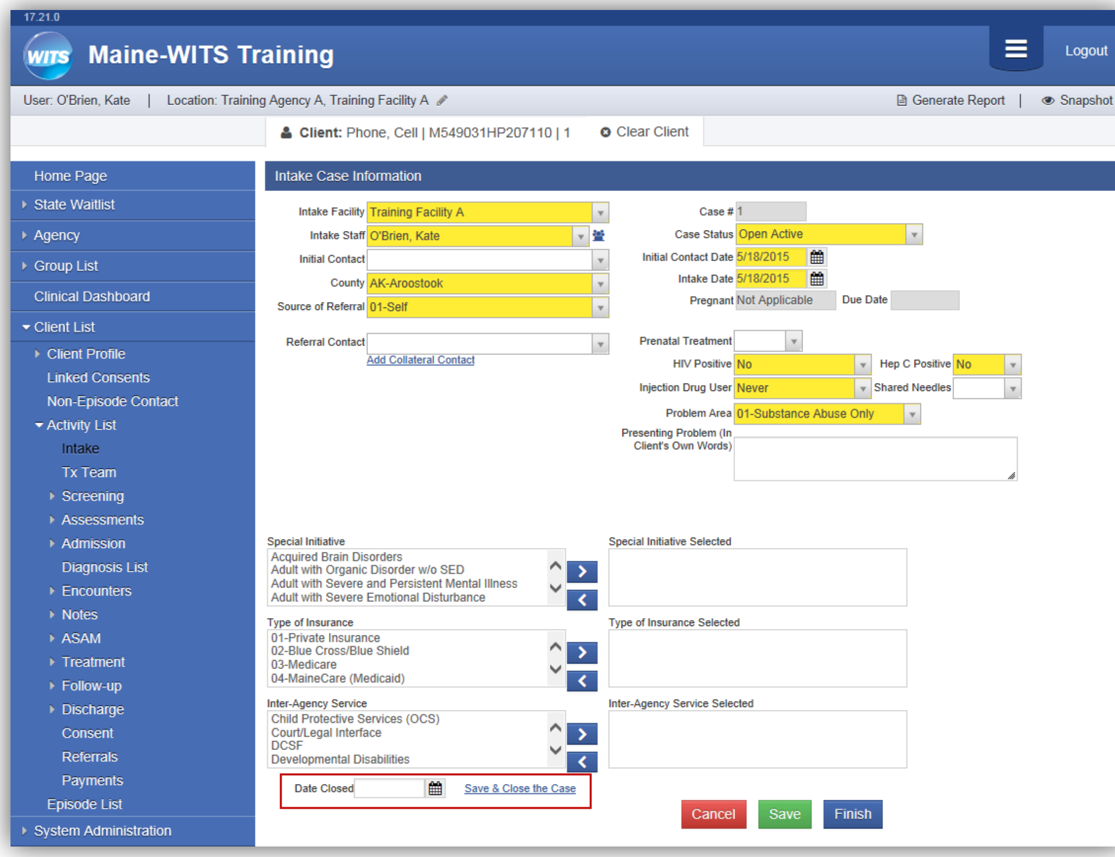




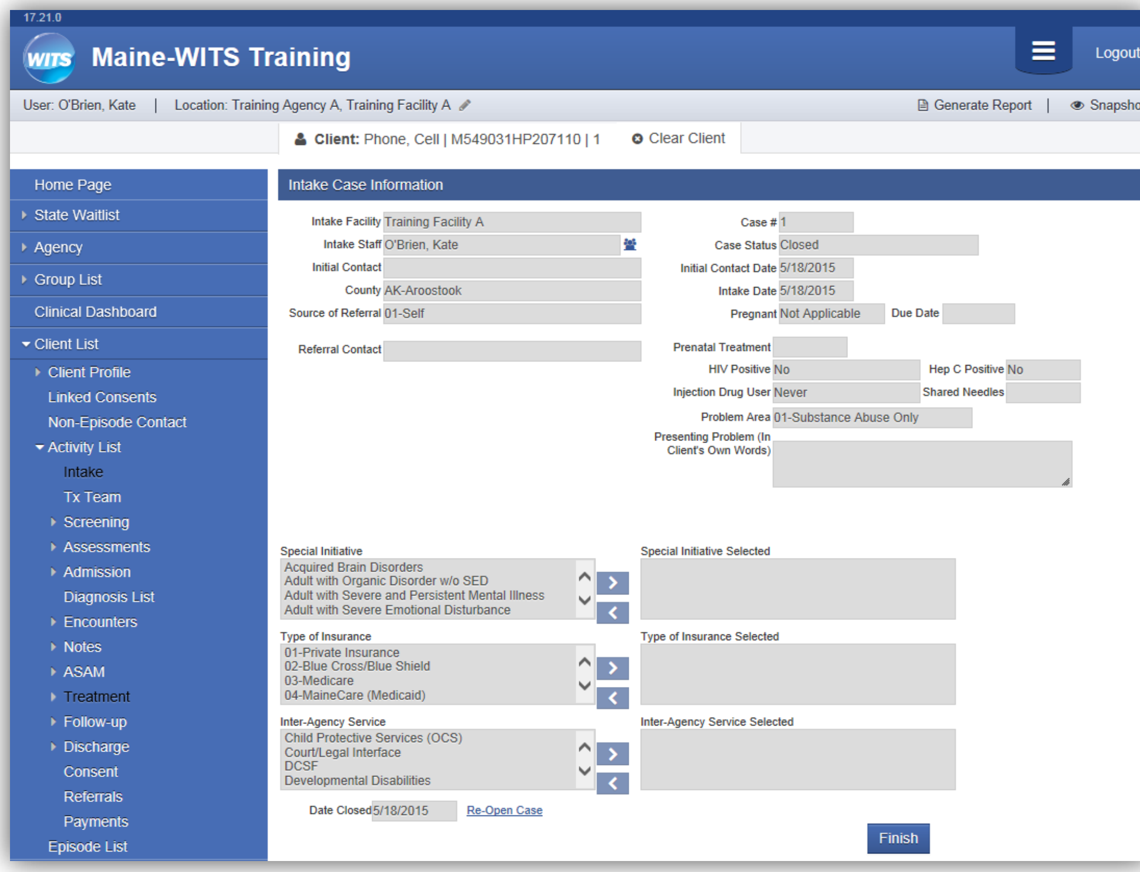
Closing a Client Intake

To begin, be sure that you have **selected a client**, since everything you do in the Intake will be applied to the client record chosen.

1. Click on the **Activity List** link located in the left hand navigation menu. OR from the **Client List**, search for the client and click on **Activity** list under the actions column.
2. Hover over the pencil icon in the actions column next to **Intake Transaction** on the **Client Activity List.** Click the **Review** link.
3. Enter the desired **date** in the **Date Closed** field and click on **Save & Close the Case** link.



4. The **Intake Case Information** screen will now be greyed out and read only. You can re-open the case by clicking on the **Re-Open Case** link if you have this role.
5. Click **Finish** to quit the screen.



Section 4. Admission

Where: Client List > Activity List > Admission

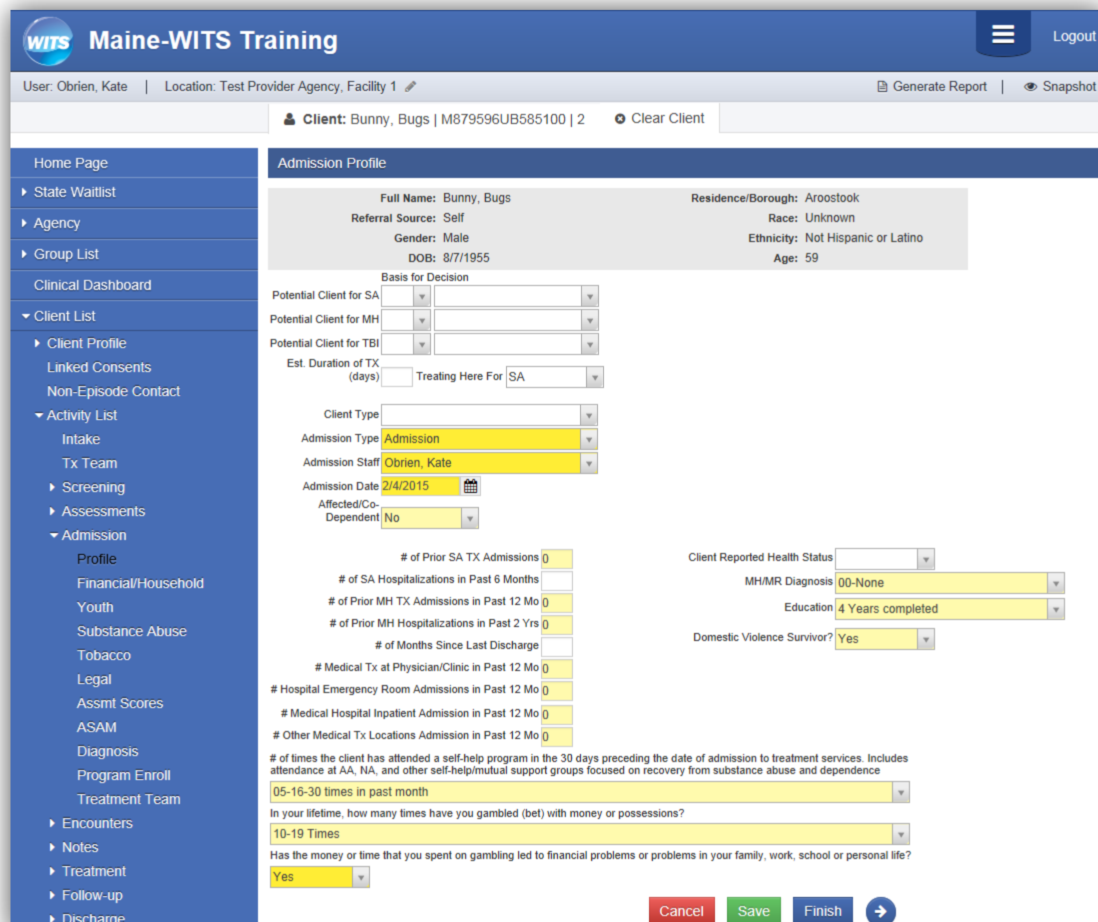
Creating a Client Admission

Admission is made up of several screens. You will need to complete all of the light yellow fields to complete the TEDS information.

To begin, click on the **Activity List** link which is located in the left navigation menu. OR from **Client List**, search for the client and click on **Activity** list under the actions column. Screeners and Assessments are also available on the left navigation menu, but are not required.

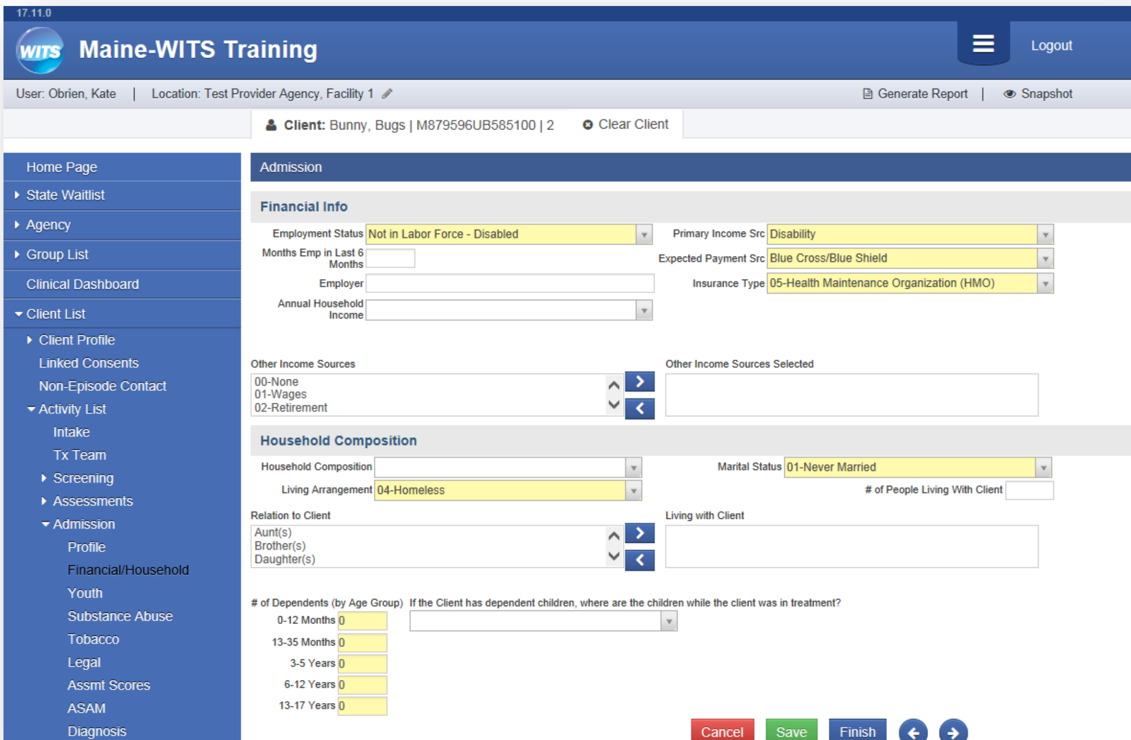
Client Admission Profile Screen:

1. Click on **Admission** from the left navigation menu, and the **Admission Profile** screen will appear.
2. At the top of the **Admission Profile** screen, the client profile information is carried over (greyed out).
3. Complete all required dark yellow fields including:
    a. **Admission Type:** Choose either Admission or Shelter & Detox
    b. **Admission Staff** (defaults to the user entering the information into WITS)
    c. **Admission Date** (defaults to today's date)
4. Complete all light yellow state reporting fields.
5. When complete, click **Save.**
6. Click on the **right arrow** button to continue entering client information.
7. When you click on the **right arrow** button, you are taken to the **Financial Household** screen.



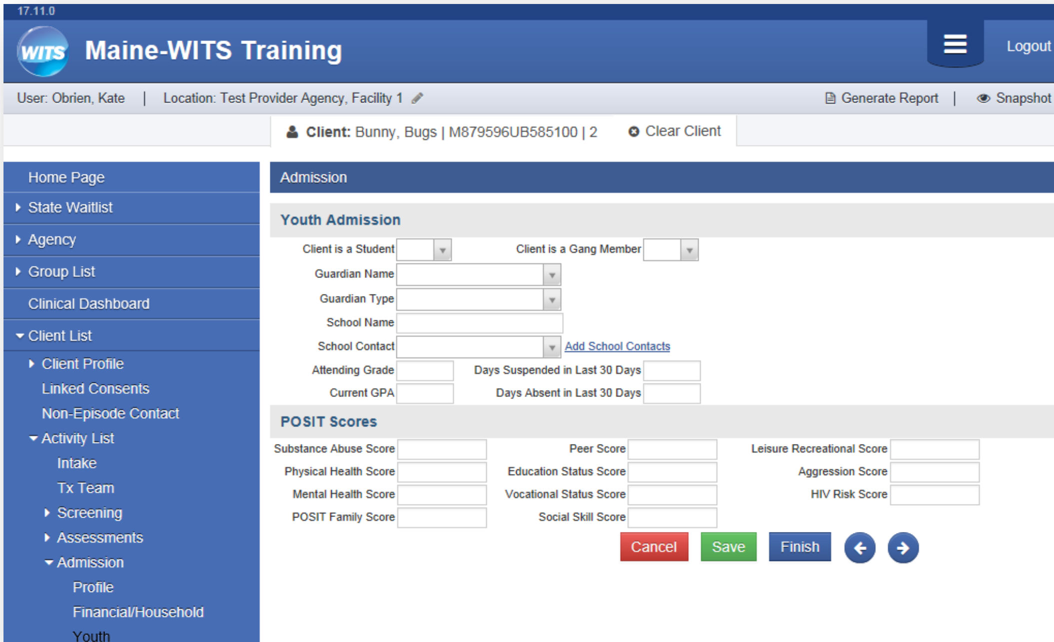
Financial Household Screen:

8. Complete all light yellow reporting fields and white fields as necessary. When complete click **Save**. (if the client has dependents, the question regarding where were the children while the client was in treatment will become dark yellow and must be completed before being able to continue.)
9. Click on the **right arrow** button to continue entering client information.
10. When you click on the **right arrow** button, you are taken to the **Youth** screen.



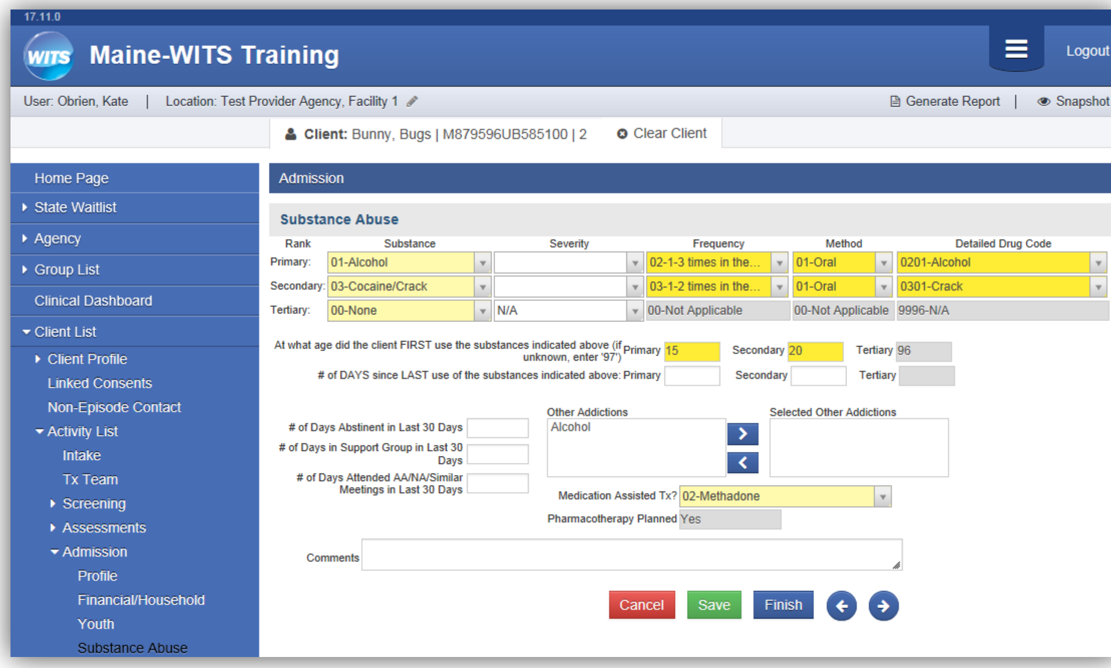
Youth Screen:

11. Complete any fields as necessary and when complete click **Finish**.
12. Click on the **right arrow** button to continue entering client information.
13. When you click on the **right arrow** button, you are taken to the **Substance Abuse** screen.



Substance Abuse Screen:

14. Select Primary **Substance**, affecting the client. Followed by the **Frequency** of use, **Method** the substance is taken and the **Detailed Drug Code.** You will notice that as you complete the required fields sub-sequential fields will become required. (the method and detailed drug code will default based upon the substance)
15. If there is a **Secondary or Tertiary** substance the client is using, complete that as well. If there are no secondary or tertiary substances select **none** for those fields.
16. Complete the **age of first use** fields for the associated substances completed above.
17. Complete any other fields as necessary and when complete click **Save** followed by the **right arrow** button to continue entering client information.
18. When you click on the **right arrow** button, the **Tobacco/Nicotine** screen appears.

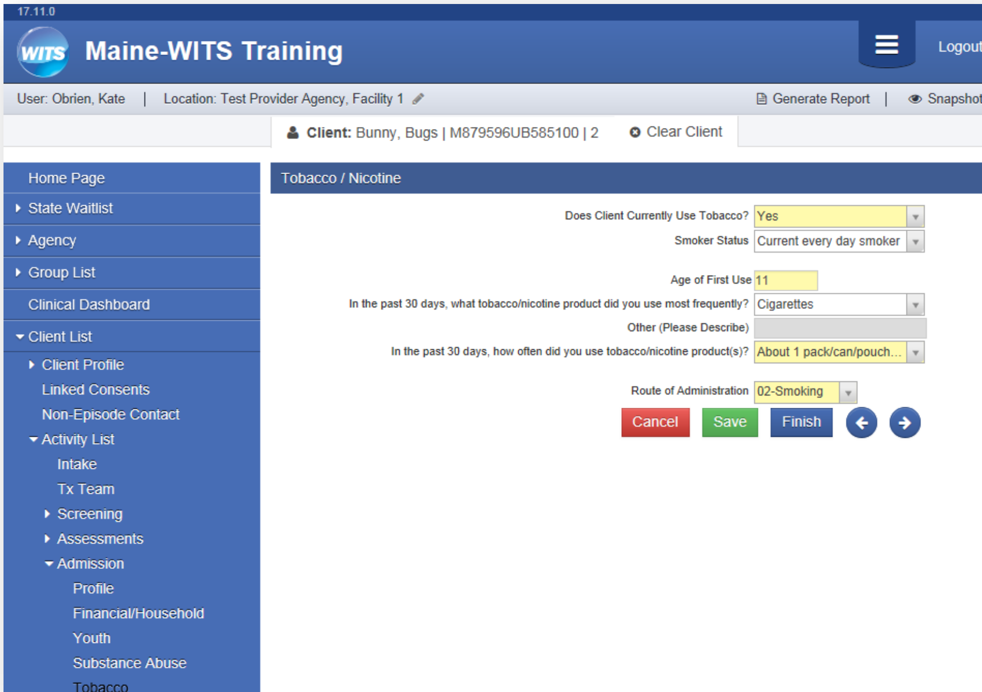


Tabacco Screen:

19. Complete any light yellow reporting or dark yellow fields as well as any other necessary fields. If **yes** is chosen for use of tobacco, subsequent fields will become light yellow reporting required.

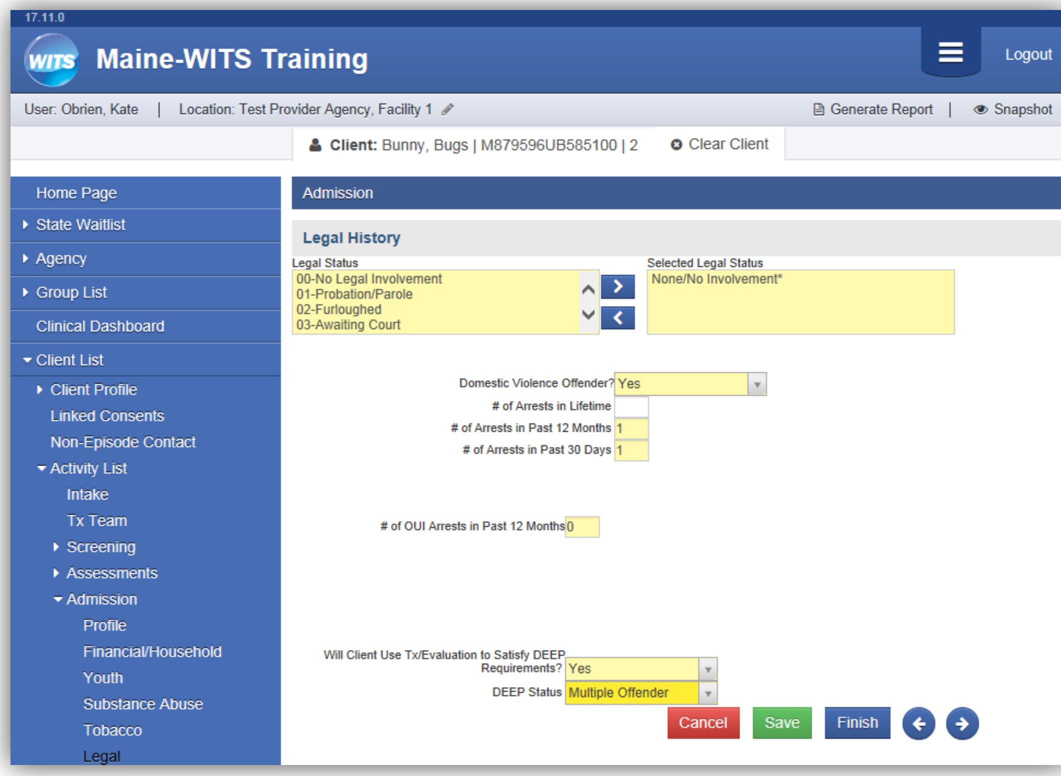
20. When complete click **Save** and click on the **right arrow** button to continue entering client information.

21. When you click on the **right arrow** button, you are taken to the **Legal** screen.



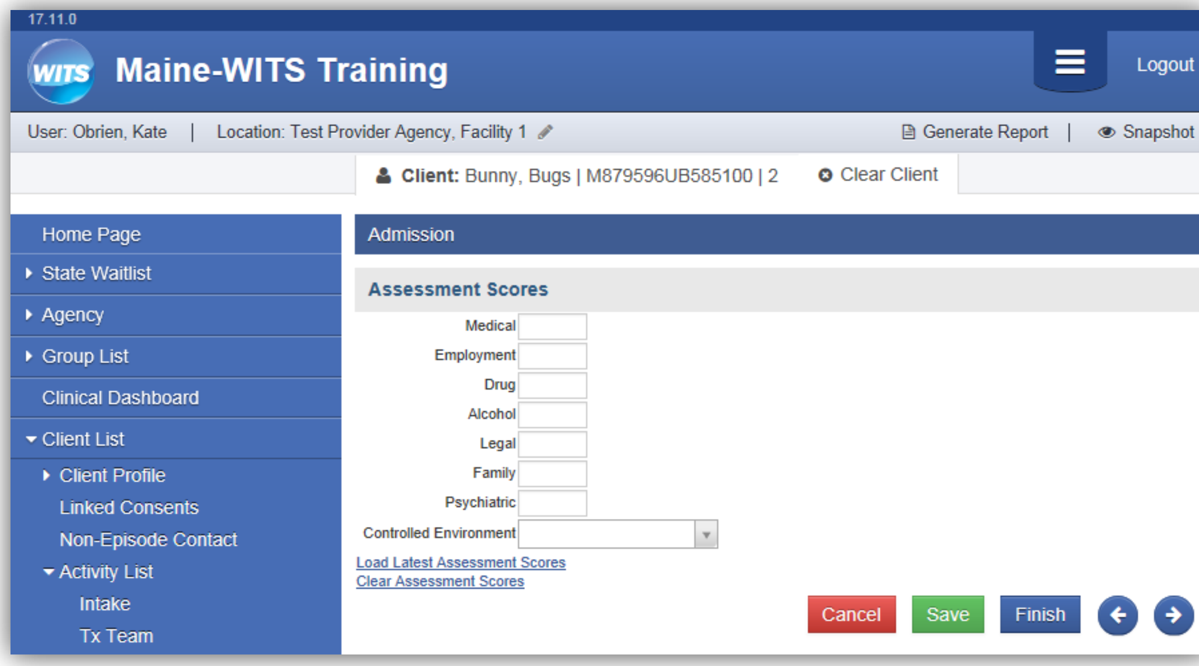
Legal Screen:

22. Use the mover box to select the client's legal status. More than one status may be selected by clicking on the status option and using the blue arrows to move.
23. If you select yes for DEEP requirements, the DEEP Status becomes dark yellow required in order to continue through the system.
24. Complete any light yellow fields as well as any other necessary fields and when done click **Save.**
25. Click on the **right arrow** button to continue entering client information. When you click on the **right arrow** button, you are taken to the **Assessment Scores** screen.



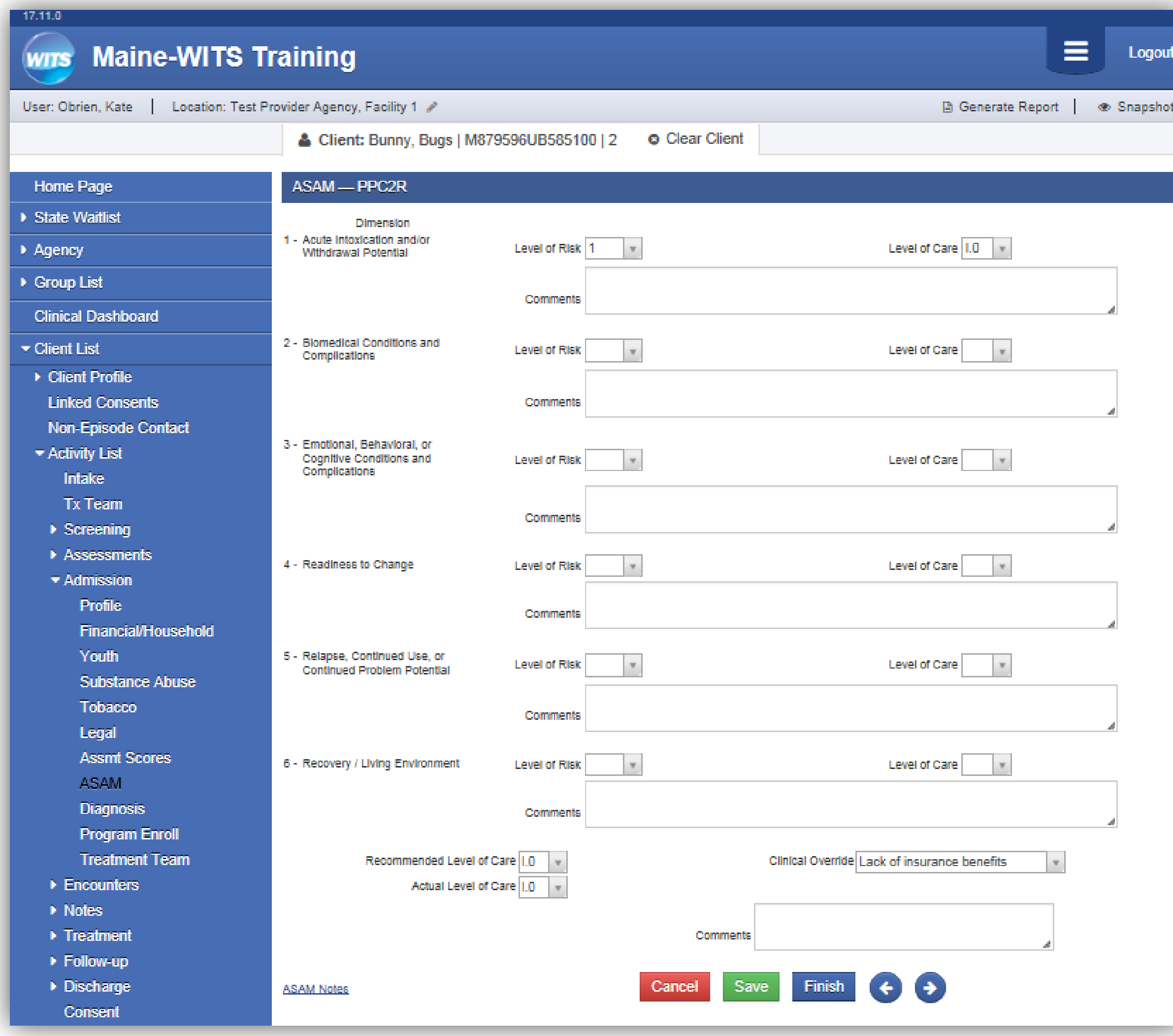
Assessment Scores Screen:

26. Enter/Select any other necessary fields and when complete click **Save.**
27. **Note**: If you have completed an ASI assessment you can click the **Load Latest Assessment Scores** if you have previously completed them in WITS, or clear the assessment scores by clicking **Clear Assessment Scores.**
28. Click **Save** followed by the **right arrow** button to continue entering client information.
29. When you click on the **right arrow** button, the **ASAM** screen appears.



ASAM Screen:

30. Complete any optional fields you deem necessary such as the **Level of Risk, Level of Care** and any **Comments** for each dimension. When complete click **Save.** (this screen will require you to click save so that you do not lose the admission information that you have already entered in case you have not yet clicked save throughout the admission screens)
31. Click on the **right arrow** button to continue entering client information.
32. When you click on the **right arrow** button, you are taken to the **Client Diagnosis** screen.

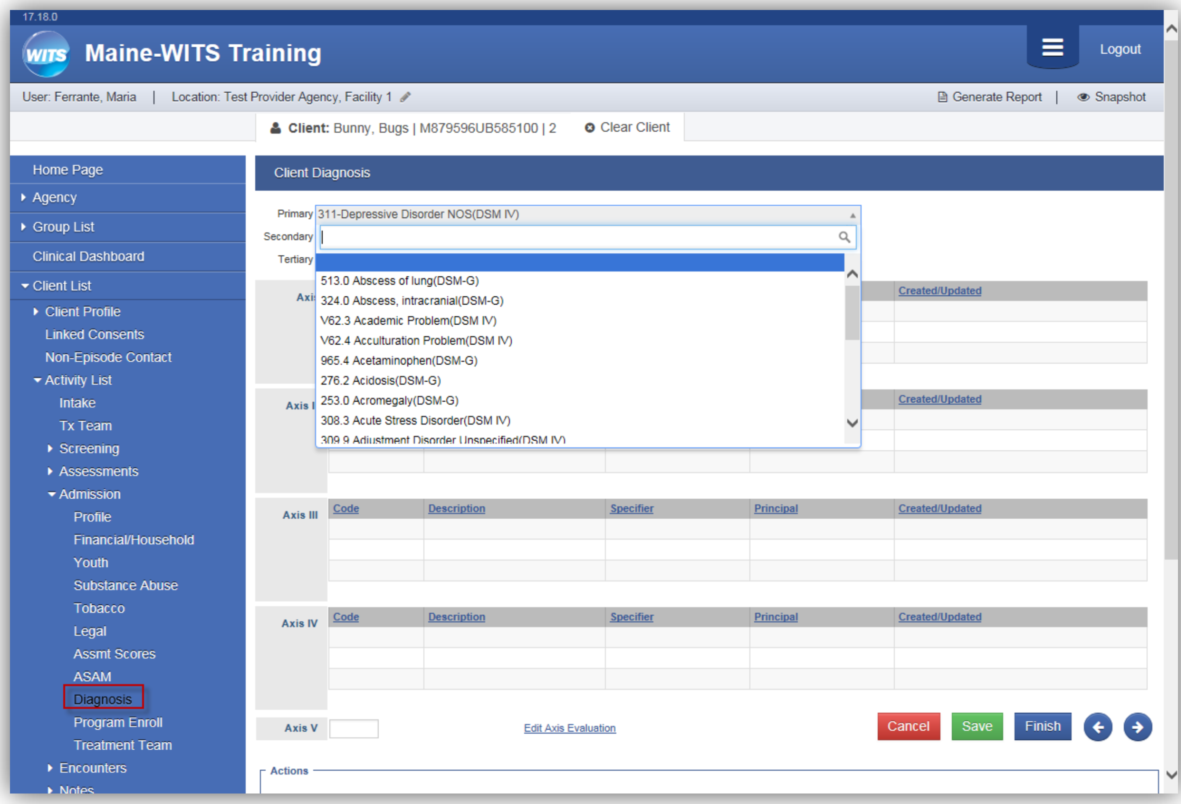

17.11.0
Maine-WITS Training
Logout
User: Obrien, Kate
Location: Test Provider Agency, Facility 1
Generate Report
Snapshot
Client: Bunny, Bugs | M879596UB585100 | 2
Clear Client
Home Page
State Waitlist
Agency
Group List
Clinical Dashboard
Client List
Client Profile
Linked Consents
Non-Episode Contact
Activity List
Intake
Tx Team
Screening
Assessments
Admission
Profile
Financial/Household
Youth
Substance Abuse
Tobacco
Legal
Assmt Scores
ASAM
Diagnosis
Program Enroll
Treatment Team
Encounters
Notes
Treatment
Follow-up
Discharge
Consent
ASAM — PPC2R
Dimension
1 - Acute Intoxication and/or Withdrawal Potential
Level of Risk 1
Level of Care I.0
Comments
2 - Biomedical Conditions and Complications
Level of Risk
Level of Care
Comments
3 - Emotional, Behavioral, or Cognitive Conditions and Complications
Level of Risk
Level of Care
Comments
4 - Readiness to Change
Level of Risk
Level of Care
Comments
5 - Relapse, Continued Use, or Continued Problem Potential
Level of Risk
Level of Care
Comments
6 - Recovery / Living Environment
Level of Risk
Level of Care
Comments
Recommended Level of Care I.0
Actual Level of Care I.0
Clinical Override Lack of insurance benefits
Comments
ASAM Notes
Cancel
Save
Finish

Diagnosis Screen:

33. Enter/Select the primary diagnosis and secondary and tertiary diagnosis if applicable as well as any other necessary fields and when complete click **Finish.**

34. Click on the **right arrow** button to continue entering client information.

35. When you click on the **right arrow** button, the **Program Enrollment** screen appears.



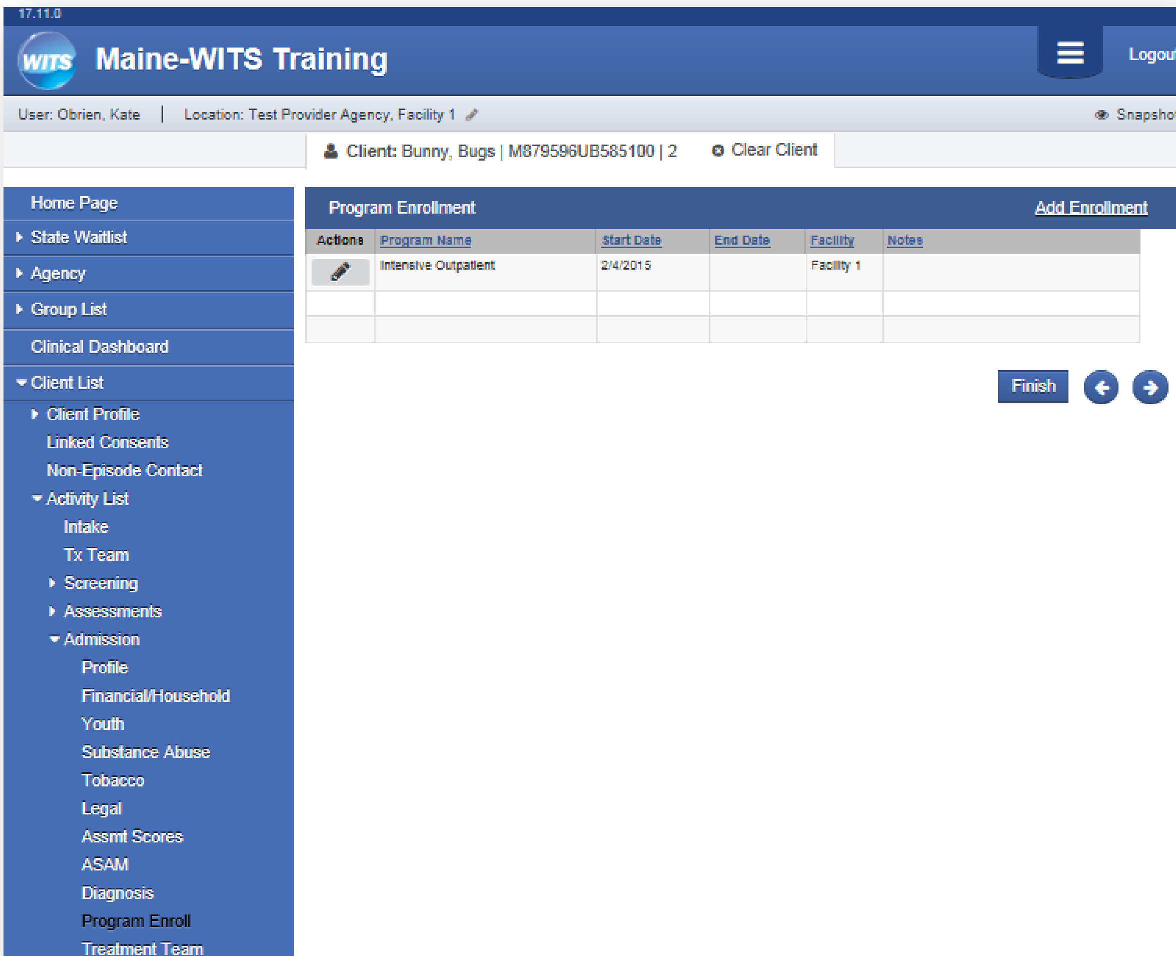
Section 5. Program Enrollment/Disenrollment

***Where:* Client List > Activity List > Program Enroll**

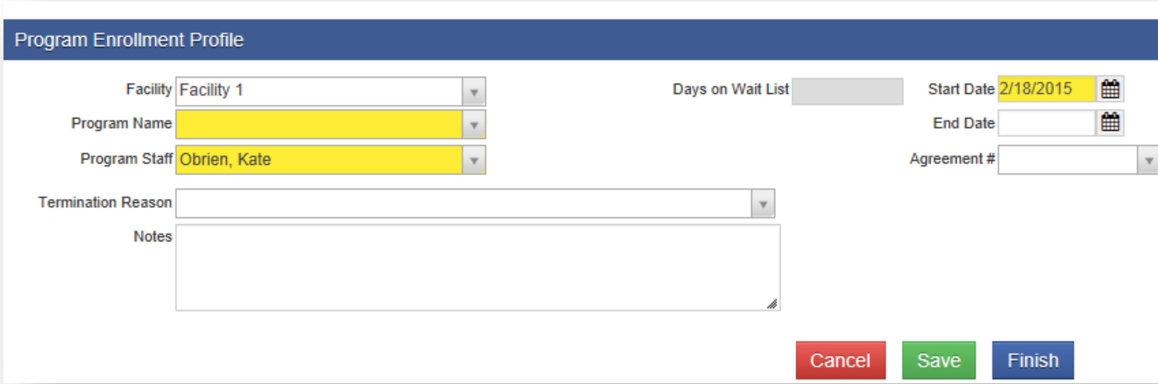
Client Program Enrollment (CPE)

Program Enrollment Screen:

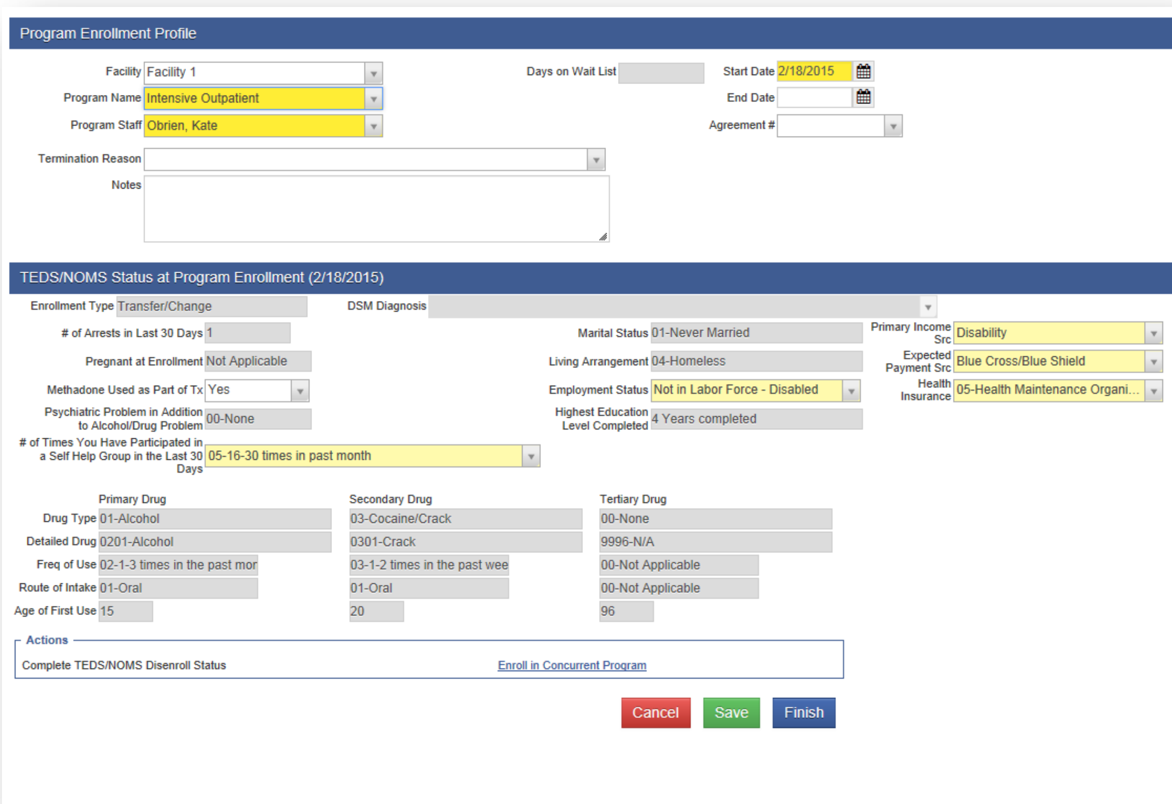
36. Click on the **Add Enrollment** link.



37. Select **Program Name**, **Program Staff** (defaults to system user), and enter **Start Date** (defaults to today's date).



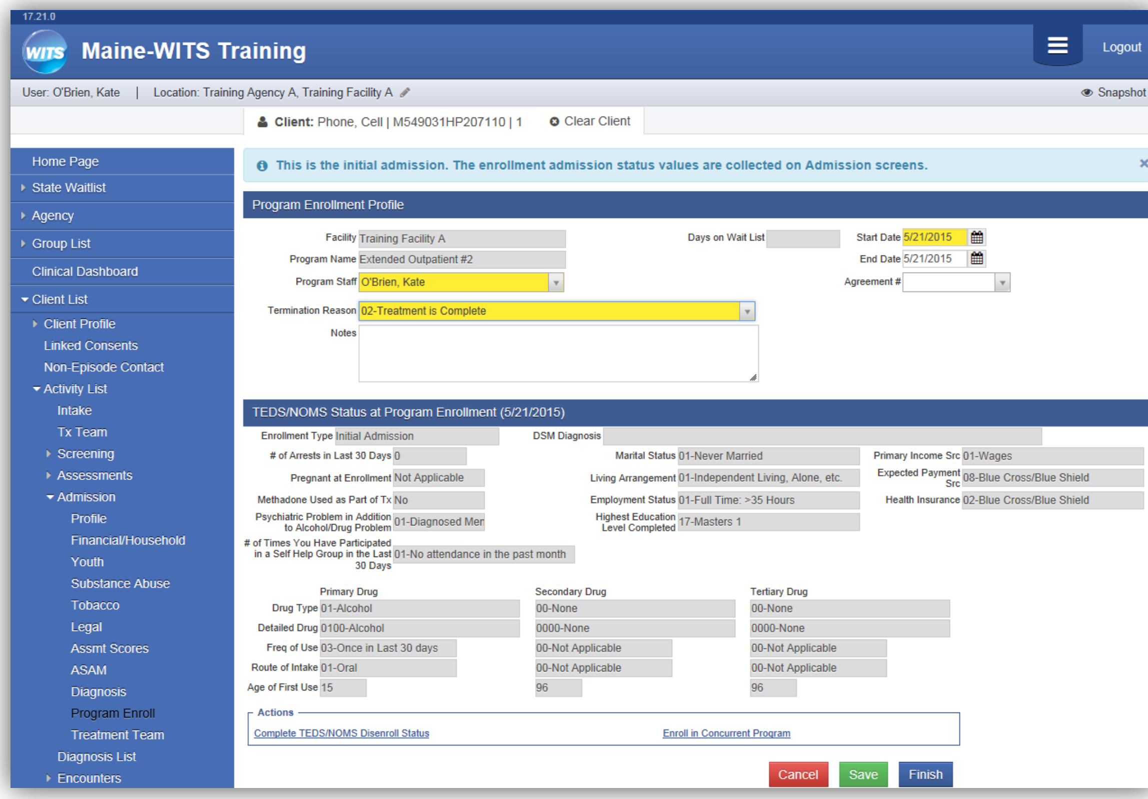
38. Once you select **Program Name**, the **TEDS/NOMS status** (that was collected through the admission) appears on the same page.



39. Enter/Select any other necessary fields and when complete click **Finish.** By clicking **finish** you will be taken back to the **Program Enrollment List** Screen. Click **Finish** to be taken back to the **Activity List** screen.

Program Disenroll/Enroll in Concurrent Program

40. From the **Client Activity List** Screen, hover over the pencil icon under the actions column and select **review** for the specific program. This will take you back to the Program Enrollment Profile screen for that program.
41. Enter a **Termination Reason**, **End Date**, **Agreement #,** and any applicable notes. Once you enter an **end date** for this particular program, the **Complete TEDS/NOMS Disenroll Status** or **Enroll in Concurrent Program** links will be available at the bottom of the screen.

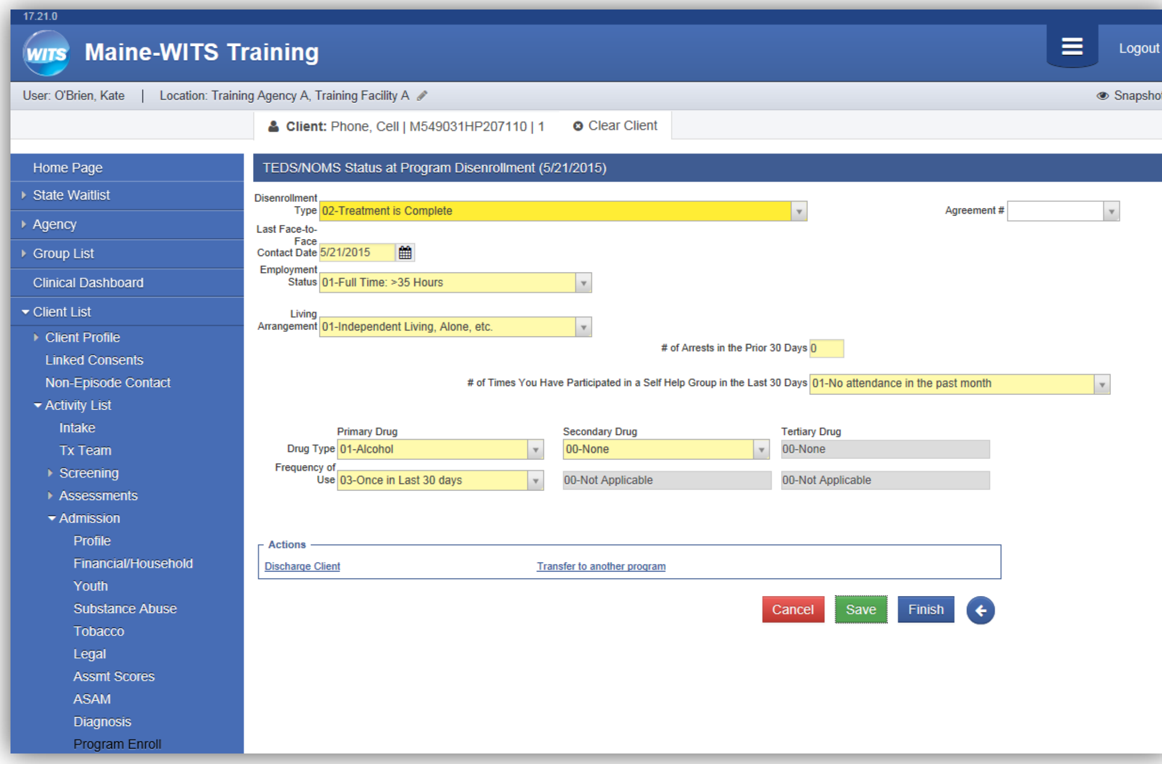


42. If you click **Finish**, the record will be saved and you will be taken back to the **Program Enrollment List** screen. The program will now show that it has an end date.
43. To complete the program disenrollment, click on the **Complete TEDS/NOMS Disenroll Status** link at the bottom of the screen. Dis-enroll is completing the specific program but not the episode of care.
44. Enter all required information and click **save**. The actions at the bottom of the screen have now become active links and you can either discharge the client from this screen (or the discharge

screen on the left navigation menu) or transfer this client to another program by clicking **Discharge Client** or **Transfer to another program.**

45. If you click on **Discharge Client** you will be taken to the **Discharge** screen.

46. If you click on **Transfer to another program**, you will be taken to the **Program Enrollment Profile** screen.



Section 6. Encounter

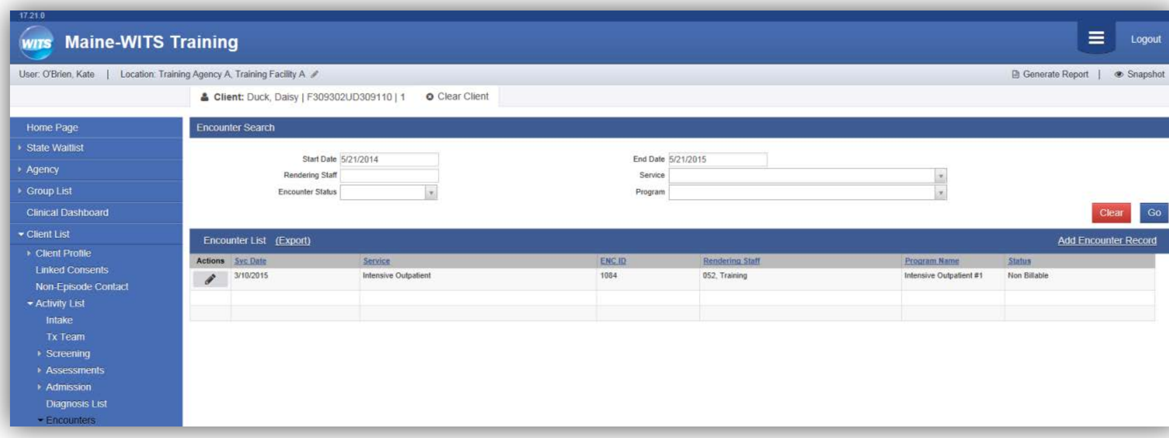
***Where:* Client > Activity List > Encounter**

You will need to enter the aggregated encounters (units) prior to discharge. OTP's (Methadone Clinics) will enter encounters once a year at follow up for long term clients.

Searching for an Encounter

The client must be enrolled in a program prior to doing an encounter. An encounter is tied to a service. To search for an encounter or to add an encounter record, click on **Encounters** on the left navigation menu or **Encounter Summary** from the **Client Activity List.**

1. When you click on **Encounters** on the left navigation menu, you will see the **Encounter Search/List** screen. (you can also get to this screen by reviewing the **Encounter Summary** from the **Client Activity List**)
2. You can search for encounters based on staff, status, service, or program. The more parameters you enter in the top search area, the smaller the encounter list will be that is returned.

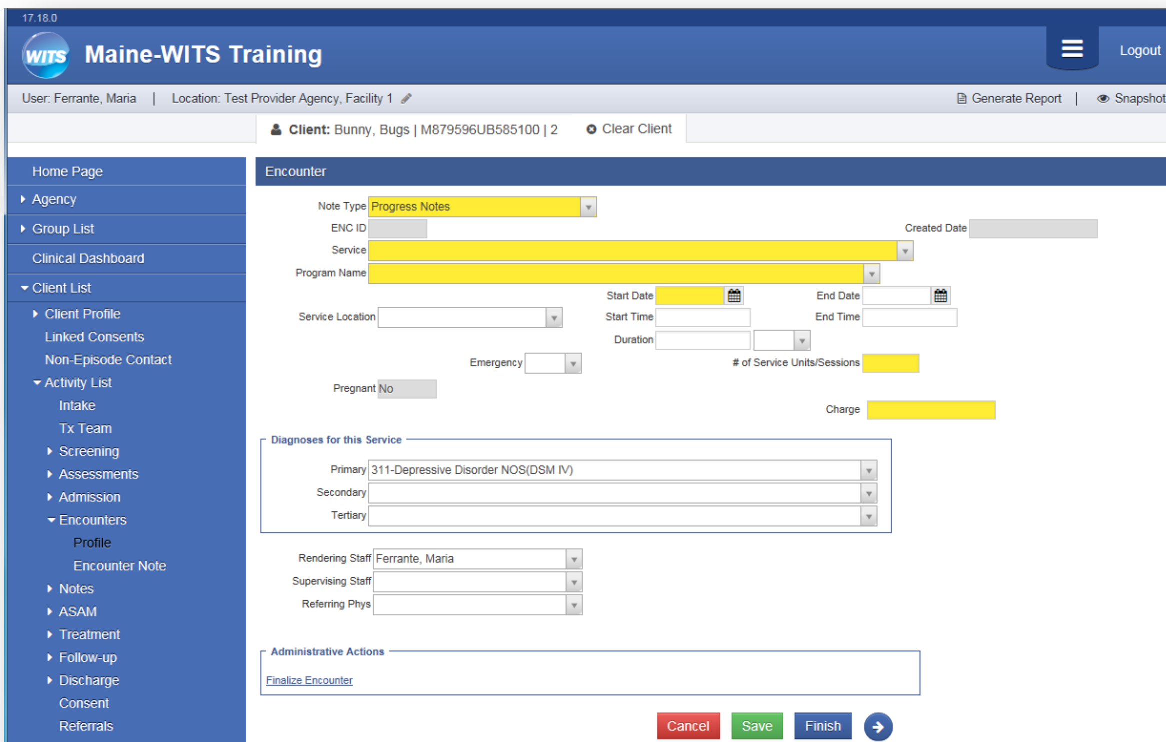


Creating an Encounter

To create an encounter record, you must first **select** a **client**. Next, click on the **Activity List** option on the left navigation menu, followed by the **Encounters** option also located in the left navigation menu. This will take you to the **Encounter Search/List** screen.

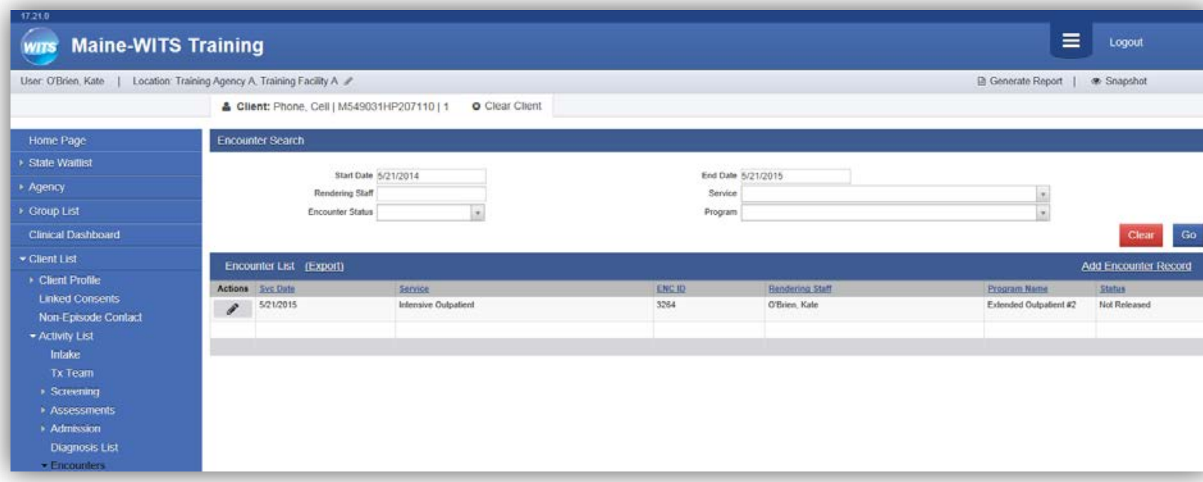
Encounter Profile Screen:

1. From the **Encounter List** screen click on the **Add Encounter Record** link.
2. You should now see the **Encounter** screen appear. Continue by entering the data in the required fields including, but not limited to:
    a. **Note Type:** Select the note type for this encounter.
    b. **Service**: Select the service you will be rendering to the client.
    c. **Program Name**: Select the program the client is enrolled in.
    d. **Start Date**: The current date is automatically generated by the system but may be edited.
    e. **# of Units/Sessions**: Enter in the number of units (aggregated encounters) you are rendering for the service selected.
    f. **Charge**: this is the amount that would be charged, no matter who is billed.

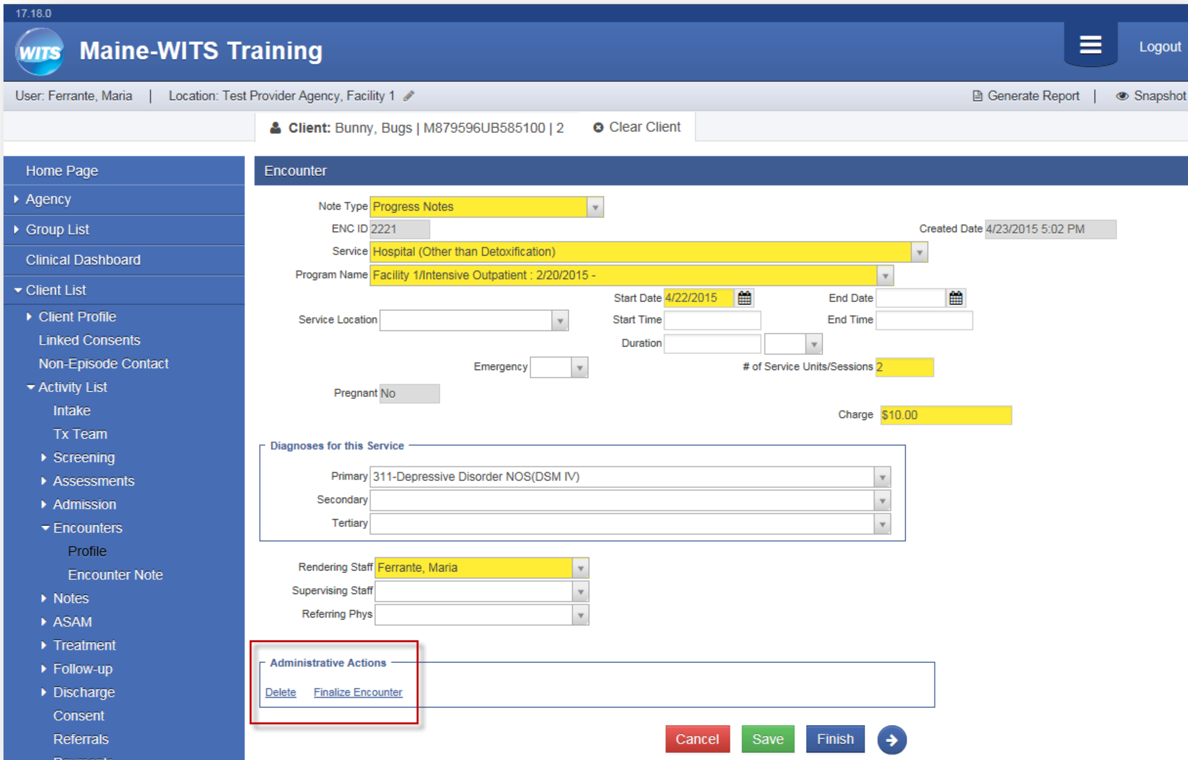


3. When you have completed entering the data, click **Finish** to continue. (if you have certain roles, you may have the option to **delete** in the **administrative actions** area on the encounter)
4. Once you have finished creating the encounter, you will be returned to the **Encounter Search/List** screen. (Notice that the encounter you have just created appears in the list, and its

status is “**Not Released**”. To see the details of the encounter or to release the encounter to billing, simply click on the **Review** link located under the **Actions** column)



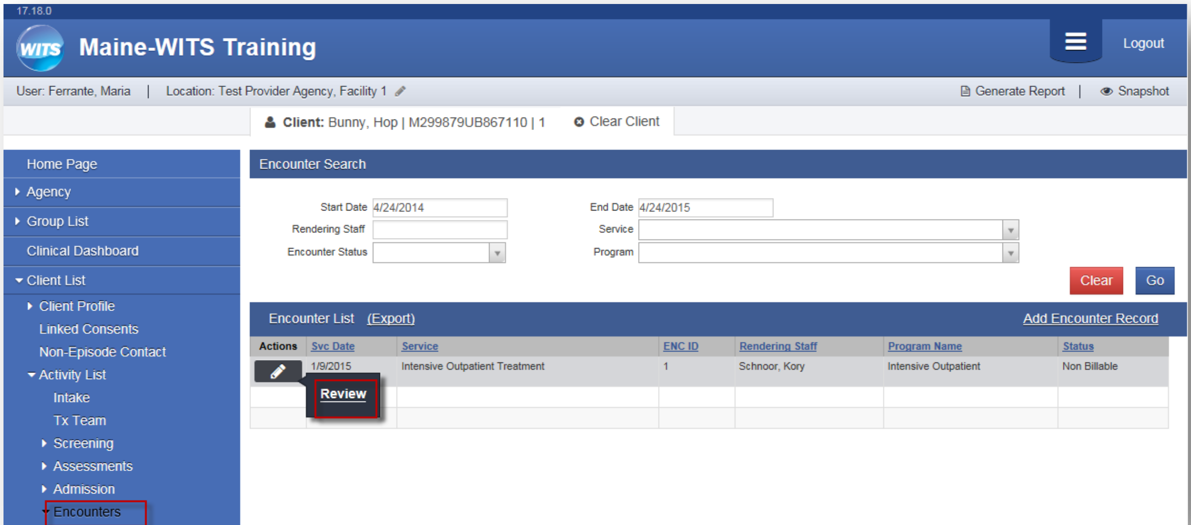
5. When you return to the **Encounter** screen, the **Administrative Actions** area will now display two options, **Delete** and **Finalize the encounter**.
6. If you entered the encounter by mistake or if you want to erase this newly created encounter, you may click on **Delete**.
7. If you have completed the encounter by clicking on **Finalize Encounter**, the screen becomes grayed out and is now read only.
8. Once you have completed reviewing the encounter continue by clicking **Finish**.



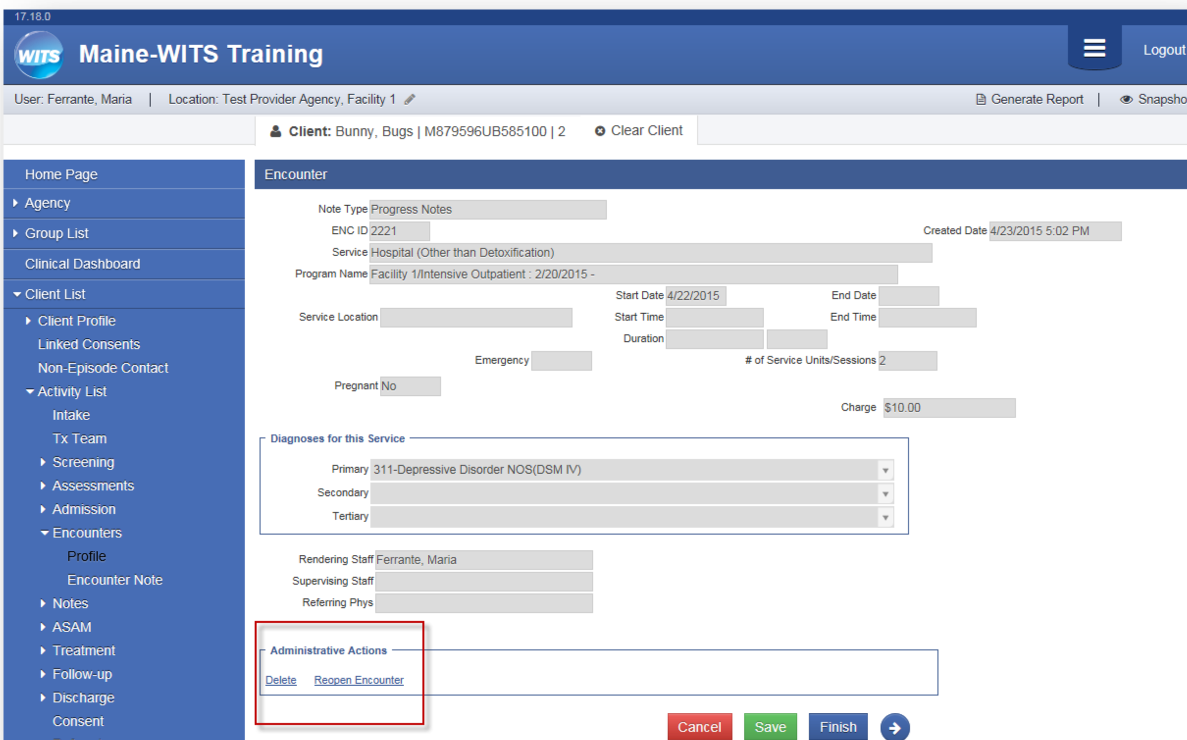
Reviewing/Editing an Encounter

From the **Client List** screen, **select a client** and click on its corresponding **Activity List** link from either the left navigation menu or the pencil icon under the action column.

1. On the **Client Activity List** screen, **search** for **Encounter Summary** and click on the **Review** link.
2. The resulting screen, called **Encounter Search/List** screen, will display a list of encounters for that client including:
    a. **Service Date**: The date of the encounter.
    b. **Service**: The service rendered for the encounter.
    c. **Status**: The status of the selected encounter.
3. To continue, **select** an encounter and click on the **Review** link.



4. When the encounter record appears, if all of the fields are grayed out click the **Reopen Encounter** link under **Administrative Actions**. This will make the screen editable again. If the fields are white and yellow you can proceed to make the necessary changes and when complete click **Save**, followed by **Finalize Encounter**, then **Finish**.



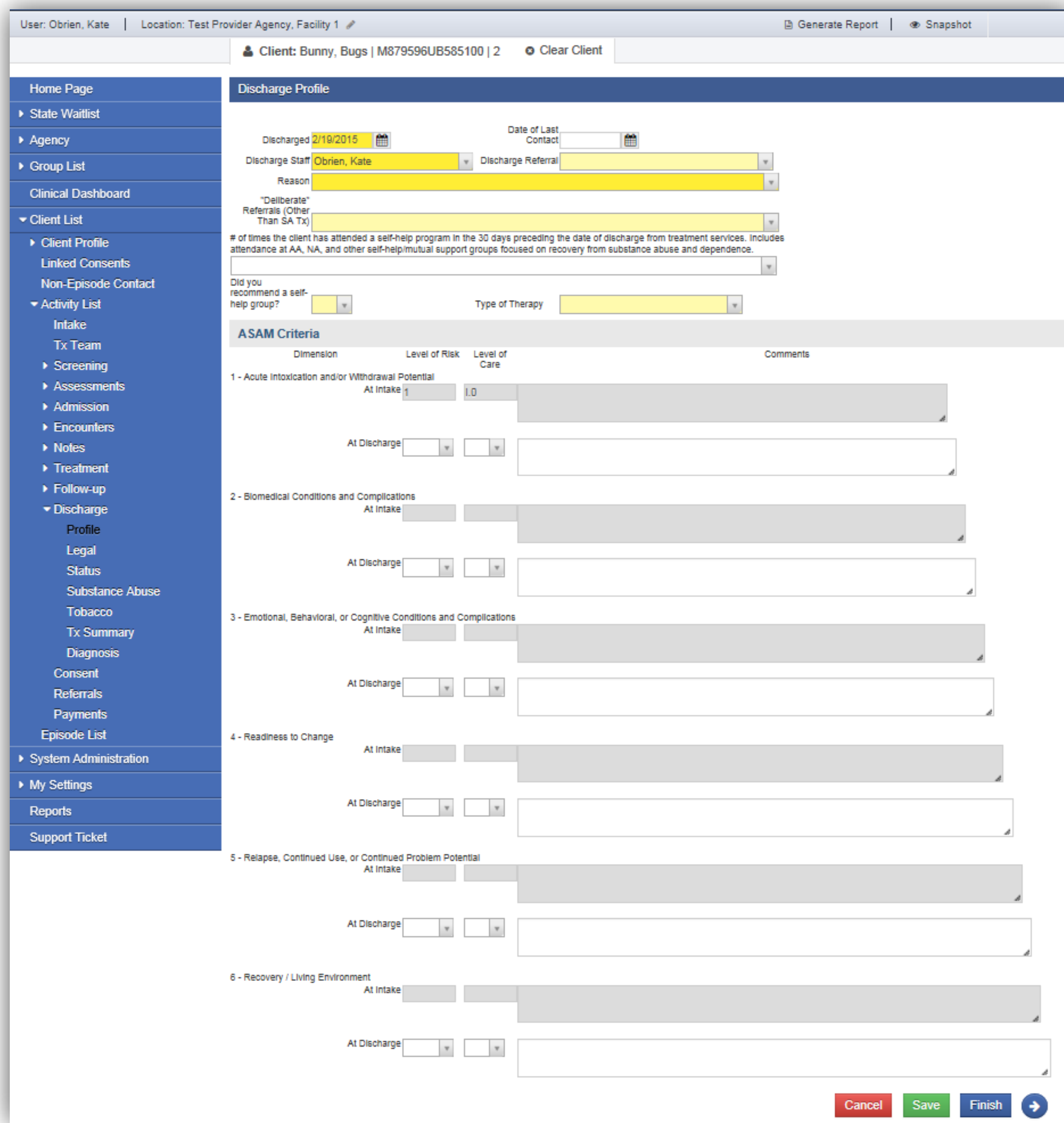
Section 7. Discharge

***Where:* Client List > Activity List > Discharge**

To complete a discharge, click on **Discharge** from the left navigation menu. In order to complete a discharge, the client cannot be actively enrolled in a program. A client must have all reporting fields (light yellow) completed throughout admission, be dis-enrolled from all programs (see above under program disenrollment) and have clicked the Complete TEDS/NOMS Dis-enroll Status (link at bottom of **Program Enrollment** screen). If the client is still enrolled in a program, WITS will automatically take you to the Program Enrollment screen when you initiate a Discharge. (Click on the details link next to an activity on the activity list to show you what is missing)

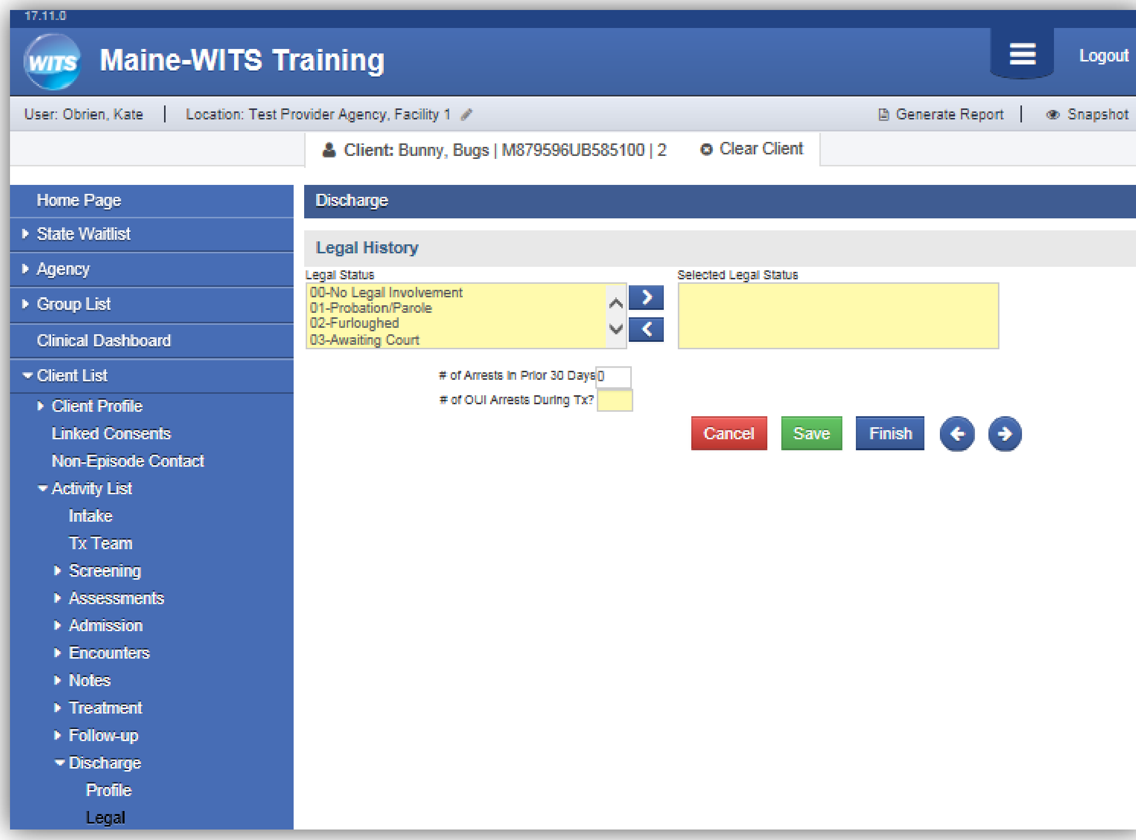
Discharge Profile Screen:

1. On the **Discharge Profile** screen the **discharged date** and **discharge staff** will populate from **Program Enrollment**.
2. Select **Reason**, **Discharge Referral**, **Referrals (Other than SA TX), Did you recommend a self-help group**, and **Type of Therapy**.
3. Select/Enter any other necessary information.
4. When complete, click **save** and move through the discharge screens using the blue navigation arrow buttons.



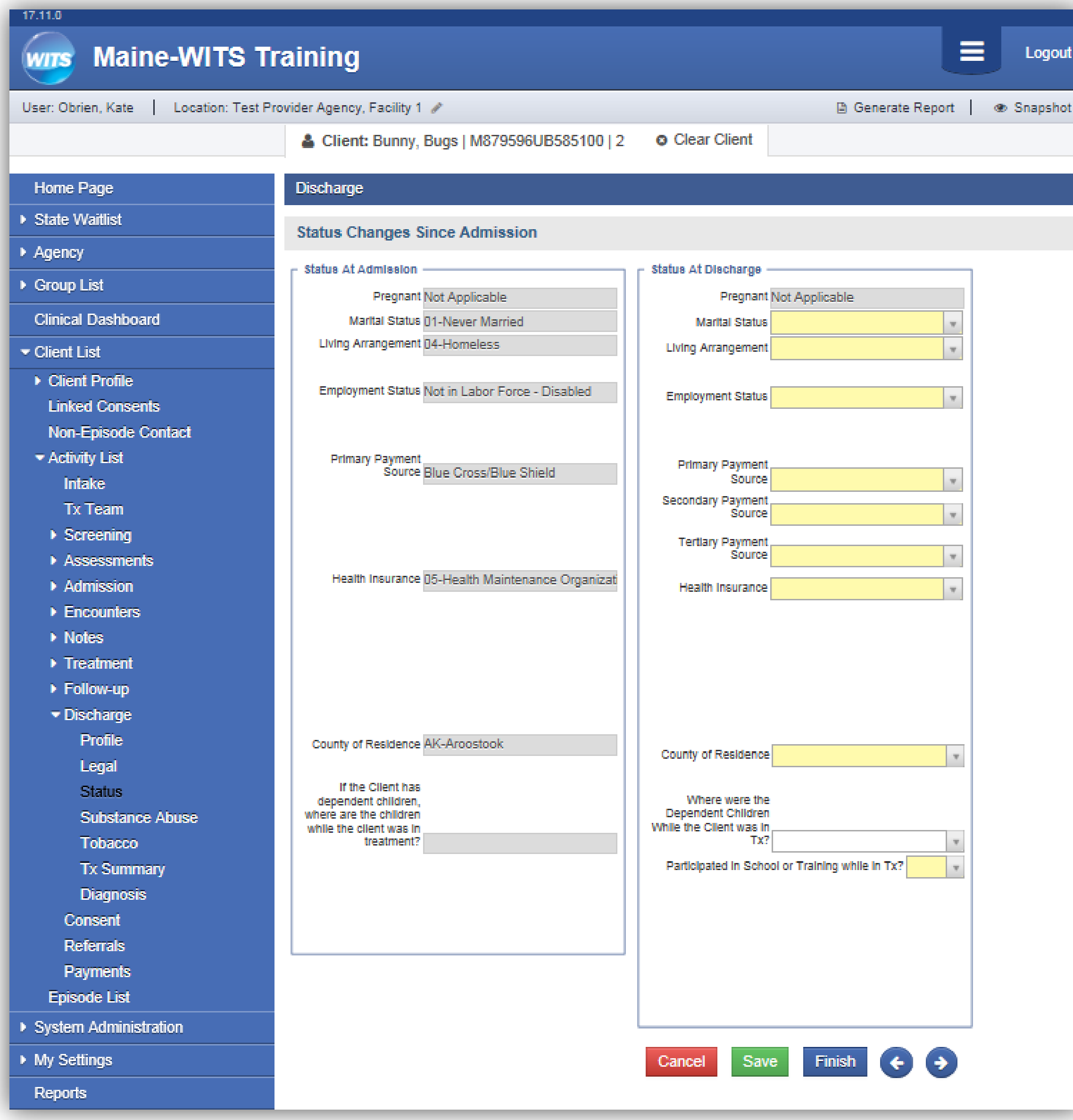
Legal Screen:

5. On the **Legal** screen select the **legal status** (or more than one status by using the ctrl function) from the mover box by clicking on the status and then using the arrows to move the selection between the mover boxes.
6. Enter the **# of OUI Arrests During Tx** and then click **save** and continue navigating through the discharge screens using the blue navigation arrow buttons.



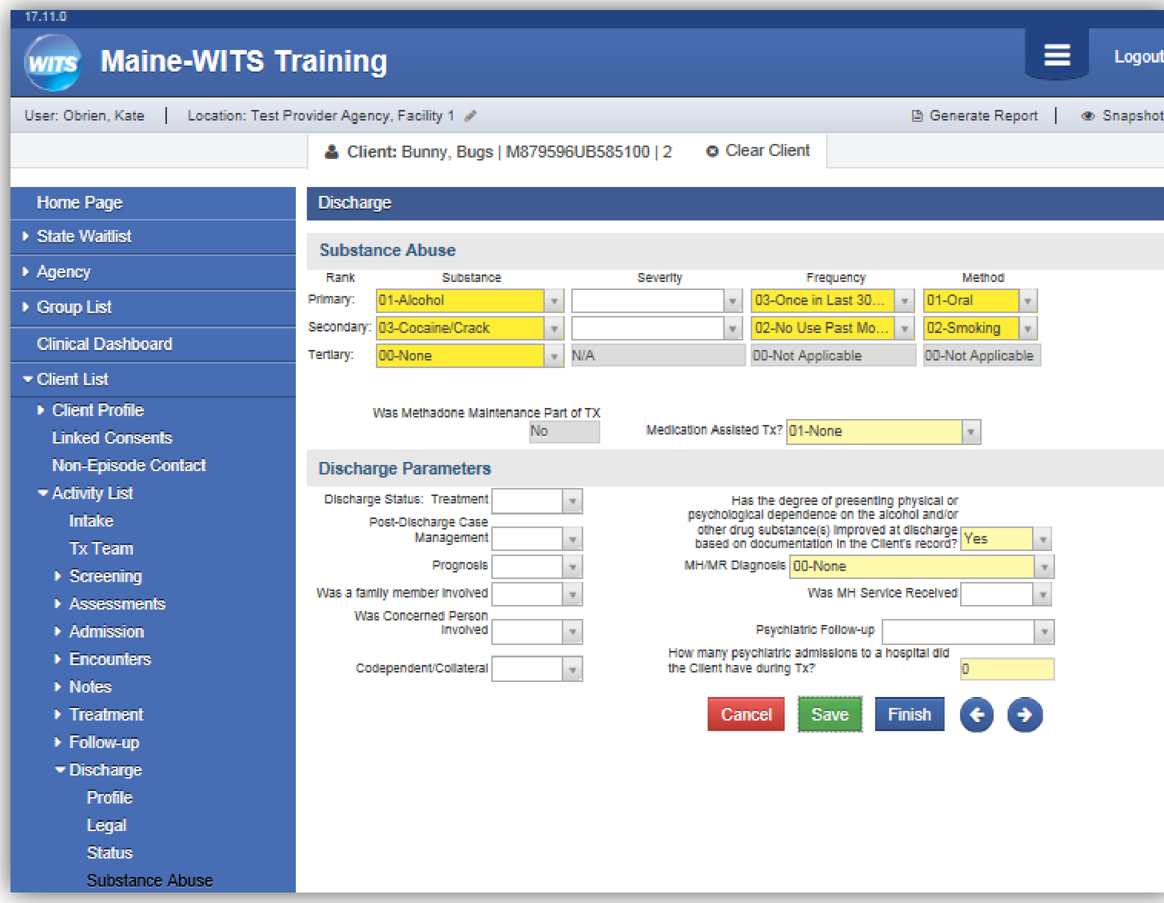
Status Screen:

7. The **Status** screen shows the client's status at Admission and captures that same status at discharge. This will show any changes in the client's status from the time of admission to the time of discharge.
8. Fill in all light yellow reporting required fields and click s**ave** and use the blue navigation arrow buttons to continue navigating through the discharge screens.



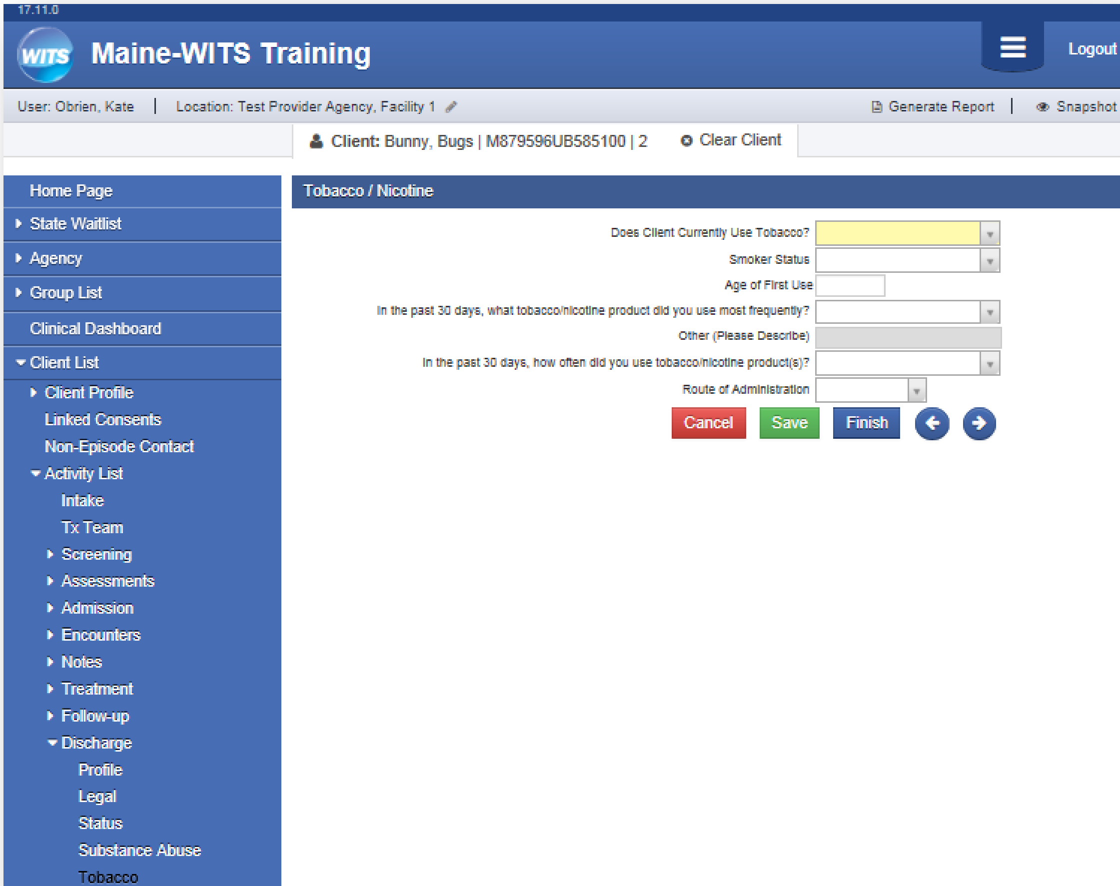
Substance Abuse Screen:

9. Complete all required fields that are light/dark yellow, as well as any other feels that you feel are necessary.
10. Click **save** and continue through the discharge screens using the blue navigation arrow buttons.



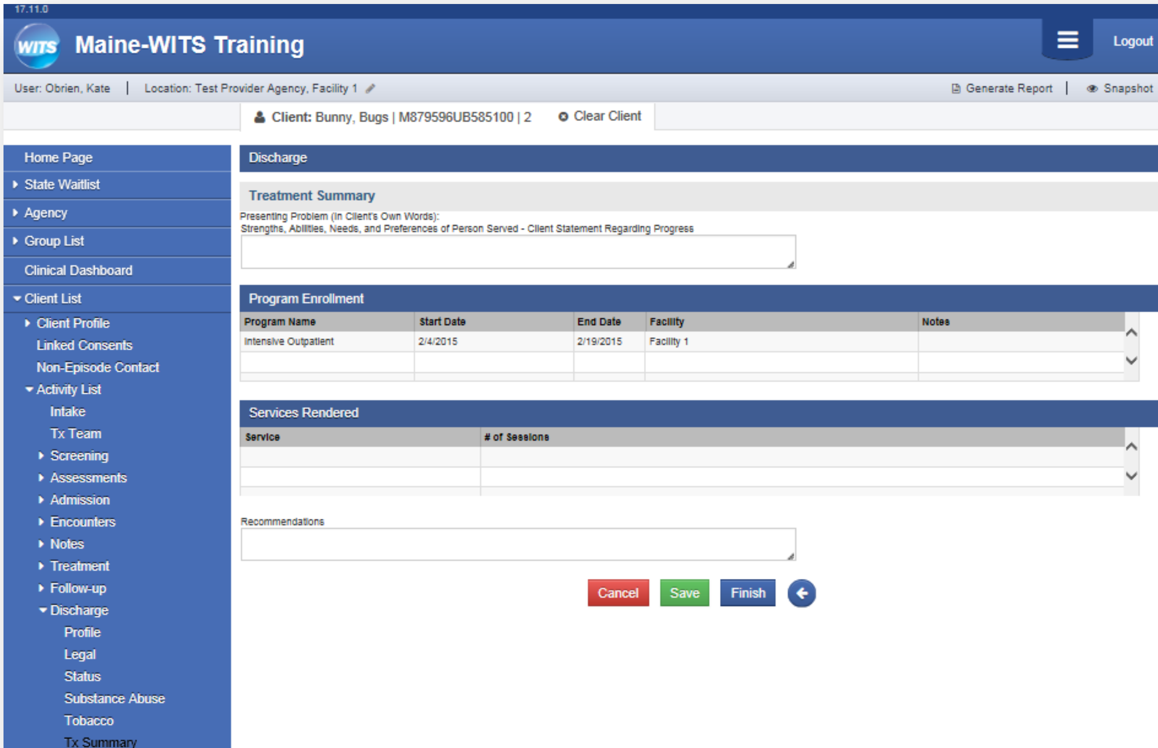
Tobacco/Nicotine Screen:

11. Complete all light yellow reporting fields.
12. Once finished, click **save** and continue through the discharge screens using the blue navigation arrow buttons.

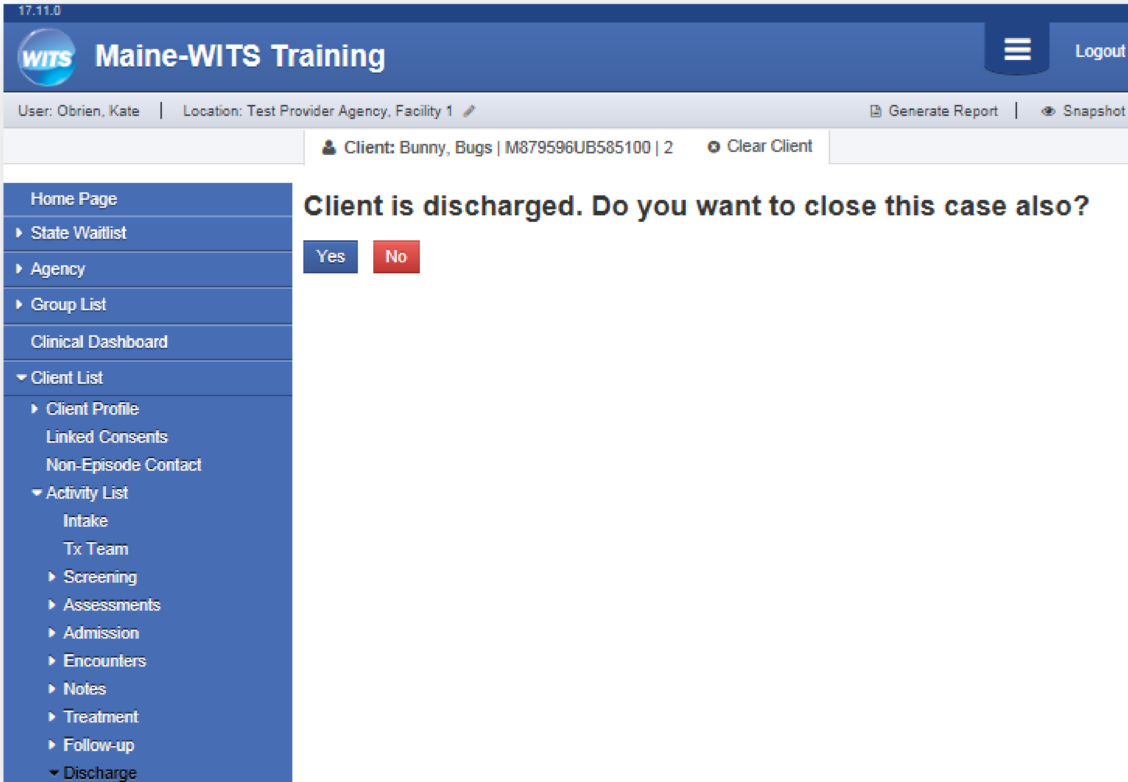


Tx Summary Screen:

13. Enter comments in the **Presenting Problem** text box (client's own words) as well as any **Recommendations** if you choose to do so.
14. Once you have filled in any necessary fields, click **finish**.



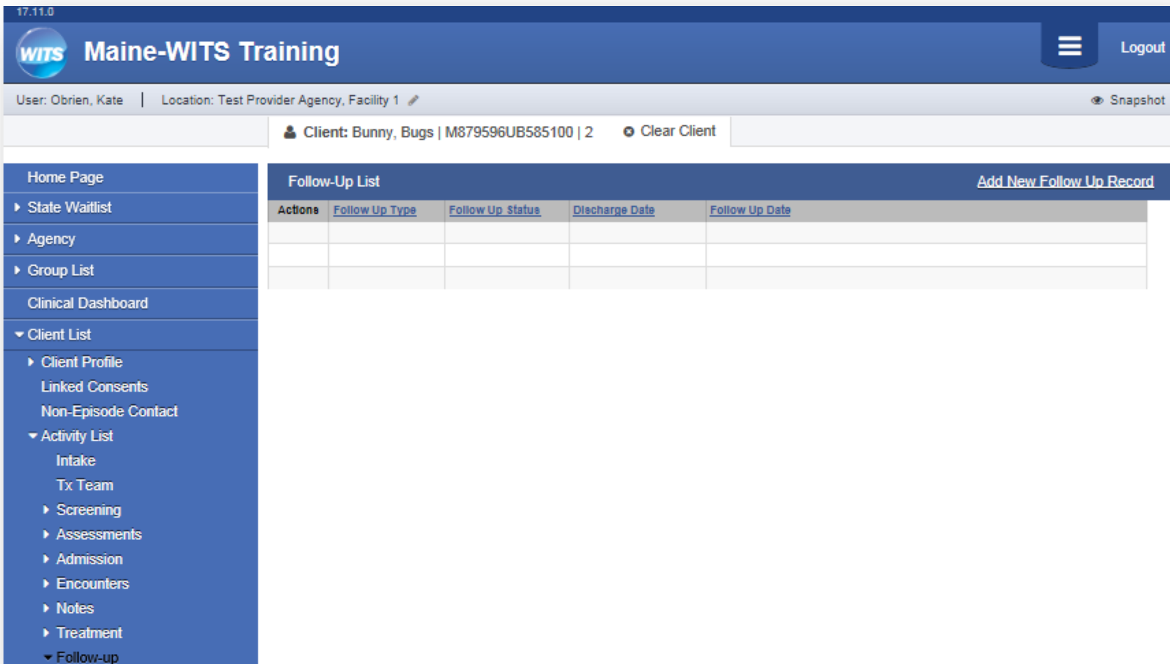
15. When you click **finish**, you will get a message informing you that the client has been discharged and the discharge is complete. You will also be asked if you would like to close the case. You can select **yes** or **no** to close the case here if you are ready to close the case. You can also close the case from the **Intake** screen at the bottom by entering in the **Date Closed** and clicking the **Save & Close the Case** link (see Intake section above).


17.11.0
Maine-WITS Training
Logout
User: Obrien, Kate | Location: Test Provider Agency, Facility 1
Generate Report | Snapshot
Client: Bunny, Bugs | M879596UB585100 | 2
Clear Client
Home Page
State Waitlist
Agency
Group List
Clinical Dashboard
Client List
Client Profile
Linked Consents
Non-Episode Contact
Activity List
Intake
Tx Team
Screening
Assessments
Admission
Encounters
Notes
Treatment
Follow-up
Discharge
Client is discharged. Do you want to close this case also?
Yes
No

Section 8. Follow Up (pre or post discharge & required for OTP)

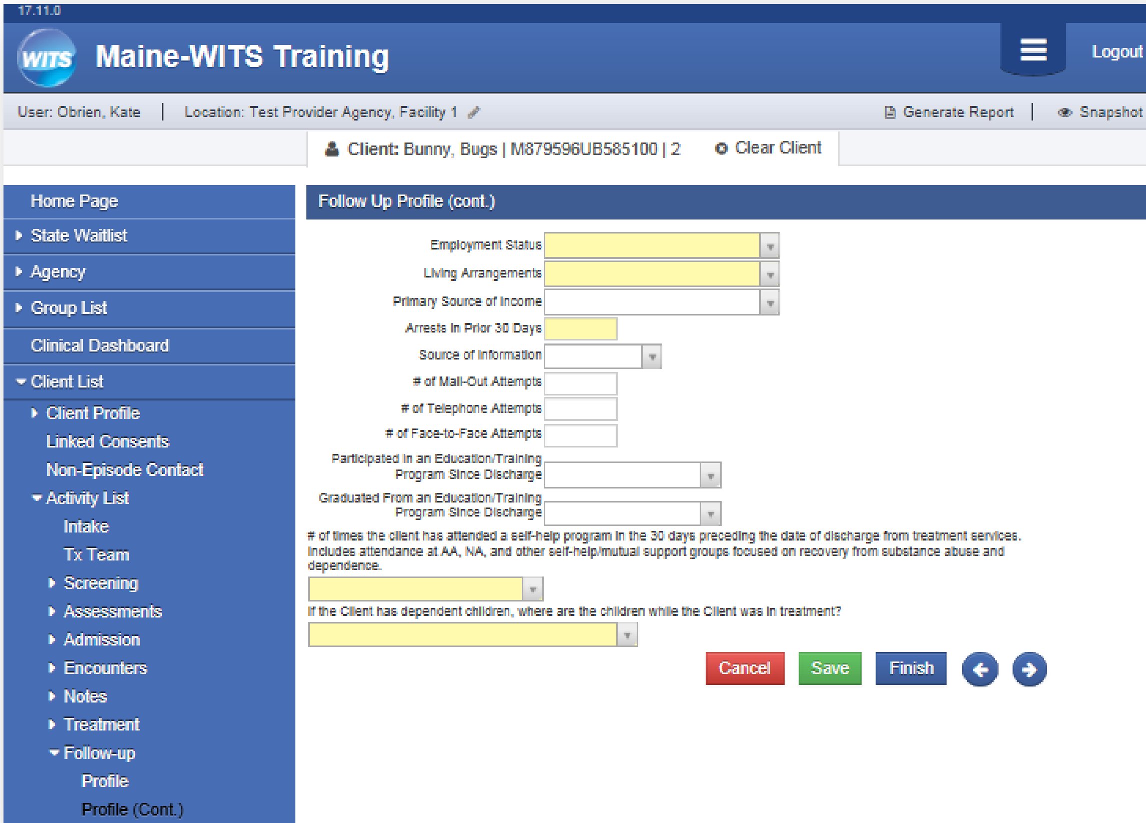
Where: Client List > Activity List > Follow Up

1. From the navigation menu on the left side of the screen, click on **Follow Up**.
2. After clicking on **Follow Up,** the **Follow Up List** screen will appear.
3. Click **Add New Follow Up Record** link to create a new follow-up.



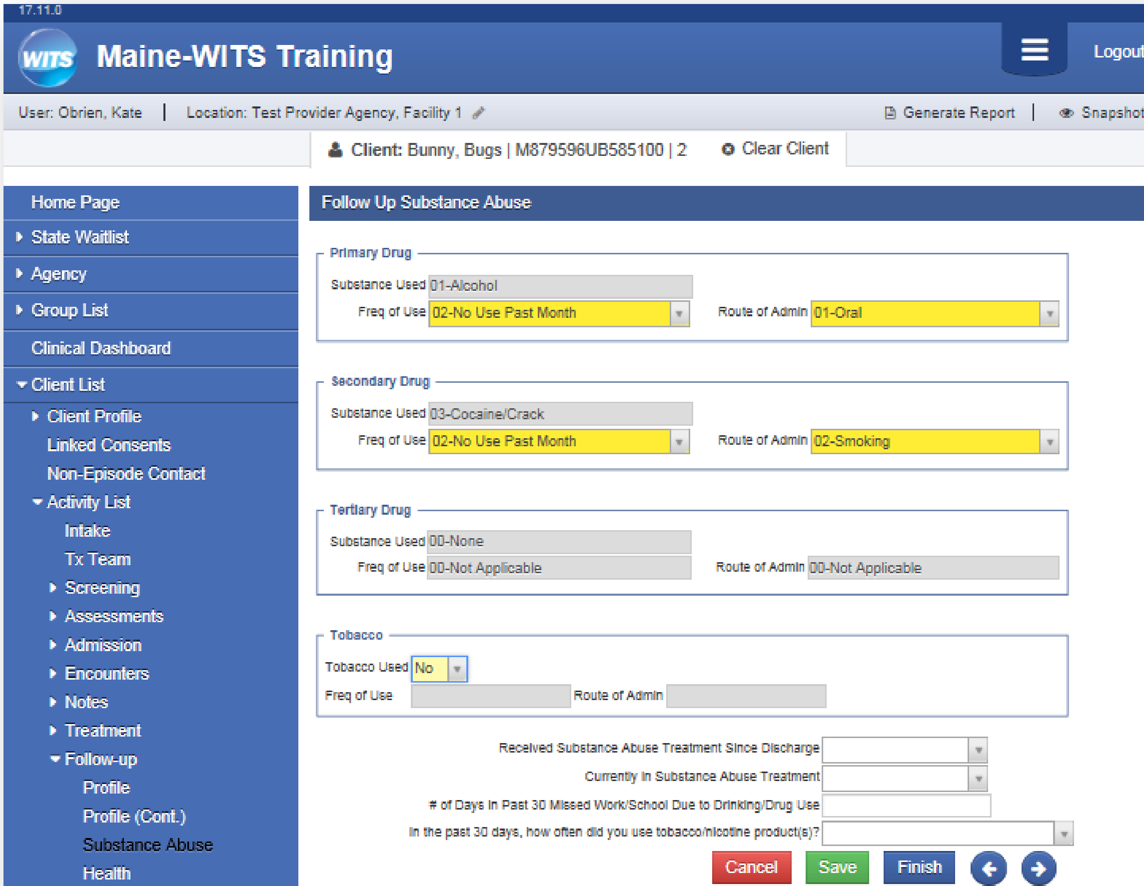
Follow Up Profile Screen:

4. Complete the **Follow-Up Type**, **Payment Source, Follow Up Date** fields.
5. Once completed, click **Save**.
6. Next, click on the **blue navigation arrow** button to continue entering client information.
7. You are now taken to the **Follow Up Profile (cont.)** screen.
8. Enter/Select all yellow fields as well as any other necessary fields and when complete click **Save.**
9. Next, click on the **blue arrow** navigation button to continue entering client information.
10. You are now taken to the **Follow Up Substance Abuse** screen**.**



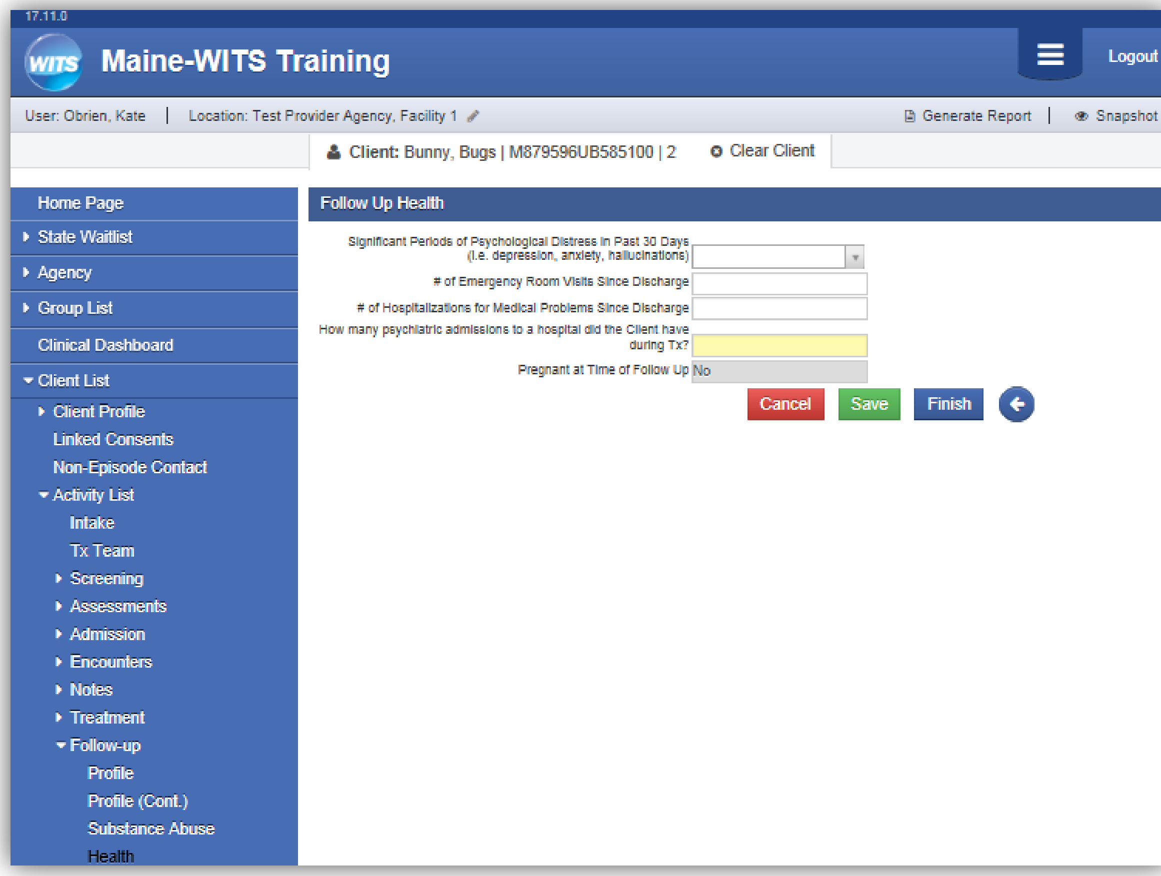
Follow Up Substance Abuse Screen:

1. Complete all required dark and light yellow fields and click **Save.**
2. Next, click on the **blue arrow** navigation button to continue entering client information.
3. You are now taken to the **Follow Up Health** screen.



Follow Up Health Screen:

4. Complete the light yellow field and any other necessary fields.
5. When complete click **Save.**
6. Next, click **Finish**.



Section 15. Support Ticket

Where: Support Ticket

The Support Ticket module has been designed to allow better reporting, tracking, and resolution of WITS bugs and errors. It provides designated users the ability to report issues from within the WITS system and introduces an improved escalation protocol that enables WITS Administrators and the FEI support desk to more effectively troubleshoot and communicate progress on reported issues.

New Features

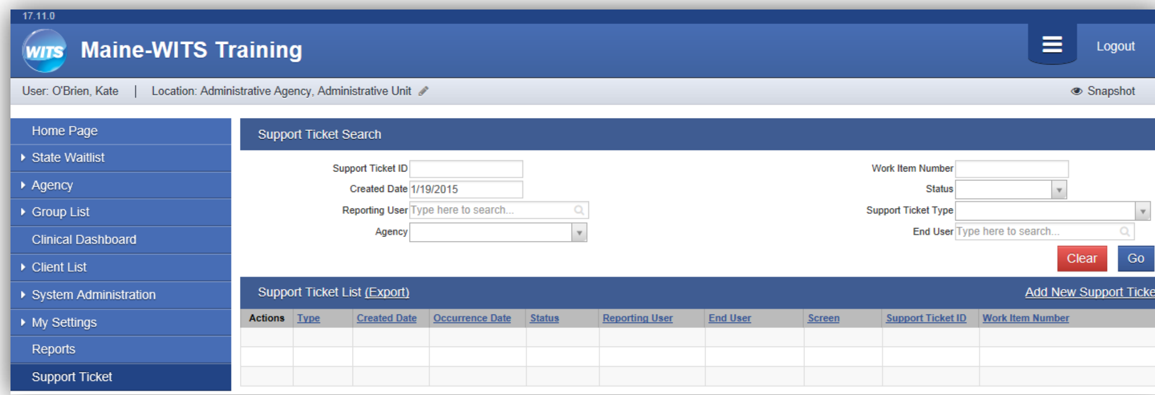
- Addition of a "Support Ticket" module at the main menu pane
- Support ticket standard operating procedure for escalations
- Support ticket team consisting of
  - Support Ticket User

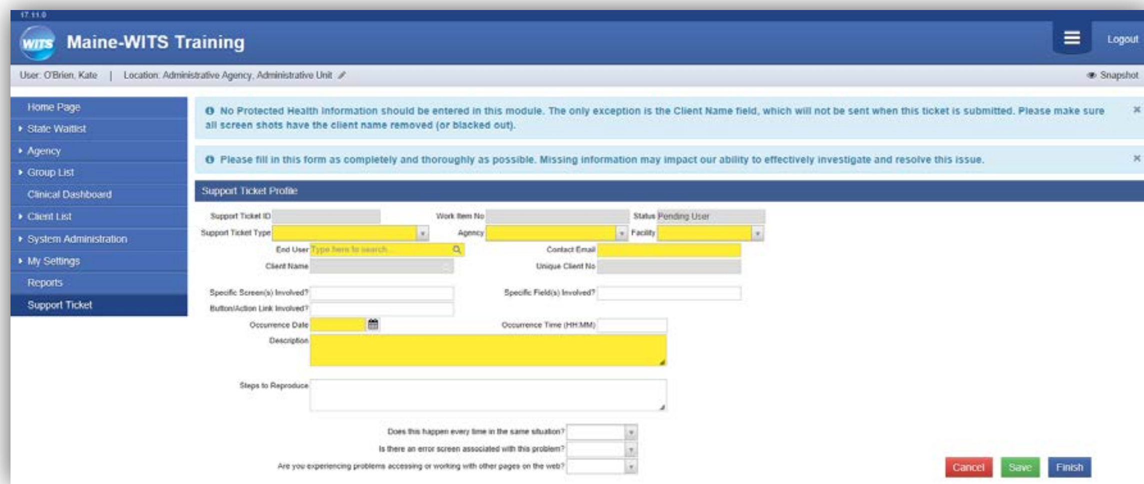
o FEI Support

Support Ticket User Responsibilities:

1. Fill out the support ticket as thoroughly as possible
2. Submitting support ticket to the WITS Administrator

To start a support ticket request, click **Support Ticket** on the left menu, then click **Add New Support Ticket**.





- All fields in yellow are required and should be filled out as thoroughly as possible
- Hovering over the fields will provide additional descriptions