



MAINE-WITS Provider User Guide

Provider User Guide

WITS

FEi Systems

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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.

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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 make 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**.

The screenshot shows the Maine-WITS Training system interface. The top navigation bar includes the WITS logo, the text "Maine-WITS Training", and a "Logout" button. Below the navigation bar, the user information "User: Ferrante, Maria" and "Location: Test Provider Agency, Facility 1" is displayed. The left sidebar contains a navigation menu with options: Home Page, Agency, Group List, Clinical Dashboard, Client List (highlighted), Client Profile, Linked Consents, Non-Episode Contact, Activity List, Episode List, System Administration, My Settings, Reports, and Support Ticket. The main content area is divided into two sections: "Client Search" and "Client List (Export)". The "Client Search" section contains various input fields for Agency, Facility, First Name, Last Name, SSN, DOB, Maine-WITS Training Client Id, Unique Client Number, Provider Client ID, Treatment Staff, Primary Care Staff, Case Status, Intake Staff, Other Number, and Number Type. There are "Clear" and "Go" buttons at the bottom of the search form. The "Client List (Export)" section displays a table of client records with columns: Actions, Unique Client#, Full Name, DOB, SSN, and Gender. A tooltip is visible over the "Profile" link in the Actions column for the client "Mouse, Mickey".

Actions	Unique Client#	Full Name	DOB	SSN	Gender
	M729521OD459110	Dog, Maximus	7/12/1995	5241	Male
	M319632OM989100	Mouse, Mickey	3/1/1996	182-91-8392	Male
	F450082T950200	T, M	10/6/1983	1234	Male
	F719566ET558120	Test, Maria	4/5/2000	556-98-5898	Female
	M209006AW799120	Walkthrough, Maine	7/21/1985	5656	Female
			2/20/1990	9076	Male

- 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 TDS client, conduct the following steps:

- On the navigation menu, click **Client**.
- Use either of the following Search Fields:
 - Last Name:** Leave blank
 - First Name:** Enter "TDS"
 - SSN:** Enter the entire SSN or last 4 digits of the SSN
 - DOB:** Enter the client's Date of Birth
 - Provider Client ID:** This will contain the TDS client number
- Click **Go**.
- 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).
- If there are potential duplicate clients, the system will return those results in a list screen.

17.14.0

wits Maine-WITS Training Logout

User: O'Brien, Kate | Location: Training Agency A, Training Facility A Generate Report | Snapshot

Client: 789654, TDS | M57975187287100 Clear Client

Profile

First Name: TDS Provider Client ID

Middle Name:

Last Name: 789654 Unique Client Number: M57975187287100

Gender: 01-Male State Client ID

DOB: 5/7/1977 Record Created By: Schnoor, Kory

SSN: 8521 Last Updated By: 017, Training

Created Date: 3/3/2015 1:23 PM

Last Updated Date: 3/4/2015 2:54 PM

Driver's License:

Consent Decree? No

Has paper file: Yes

Administrative Actions

Cancel Save Finish →

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.

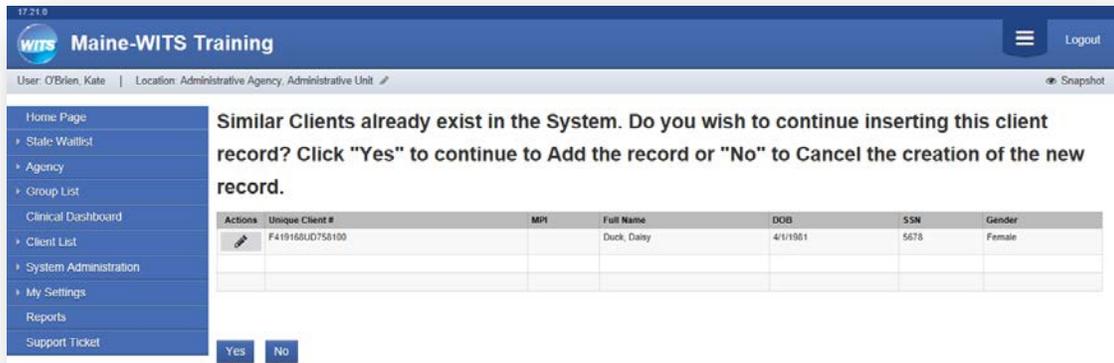
The screenshot shows the 'Maine-WITS Training' interface. The left navigation menu has 'Client List' highlighted. The main area is titled 'Client Search' and contains various input fields for searching clients. Below the search fields is a table titled 'Client List (Export)' with columns for Actions, Unique Client #, Full Name, DOB, SSN, and Gender. The table is currently empty. A red box highlights the 'Add Client' button in the top right corner of the table area, with a red arrow pointing to it.

Client Profile Screen:

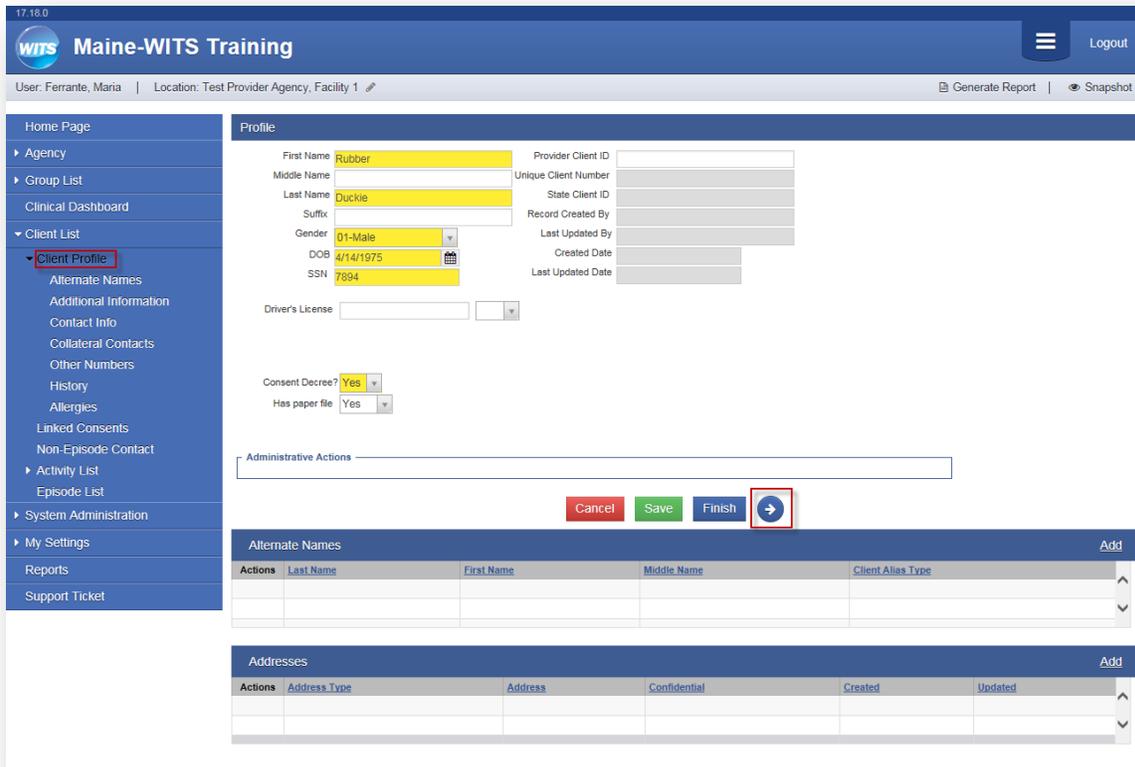
2. In the **Client Profile** screen, enter all required (yellow fields) client information including **First Name/First Initial, Last Name/Last Initial, Gender, DOB, SSN** (only the last 4 are required) and **Consent Decree**.
3. To complete your entry, click **Save** and use the **blue arrows** to navigate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



- 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:

- 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.
- 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**.
- 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.
- When complete, click **Save** or **Finish**. The names now show up in the list on the top of the screen.
- Click** on the **right arrow** button to continue to the **Additional Information** screen.

17.18.0

WITS Maine-WITS Training Logout

User: Ferrante, Maria | Location: Test Provider Agency, Facility 1 Generate Report | Snapshot

Home Page

- Agency
- Group List
- Clinical Dashboard
- Client List
 - Alternate Names**
 - Additional Information
 - Contact Info
 - Collateral Contacts
 - Other Numbers

Actions	Last Name	First Name	Middle Name	Client Alias Type
		Baby Yellow		

Add Alternate Name

First Name: X Middle Name:

Last Name: Client Alias Type:

Cancel **Finish**

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.

The screenshot displays the 'Additional Information' screen in the Maine-WITS Training system. The interface includes a top navigation bar with the WITS logo and 'Maine-WITS Training' text. Below this, a user header shows 'User: Ferrante, Maria' and 'Location: Test Provider Agency, Facility 1'. A client header identifies 'Client: Duckie, Rubber | M449584UD977110' with a 'Clear Client' button. A left sidebar menu lists various options, with 'Additional Information' highlighted in red. The main content area contains several form fields: 'Ethnicity' (01-Not Hispanic or Latino), 'Races' (02-Black or African American, 03-American Indian or Alaskan Native, 04-Asian, 05-Native Hawaiian or Other Pacific Islander, 99-Other) with a right arrow button, 'Selected Races' (01-White), 'Special Needs' (Hearing, Language, Physical, Visual) with up/down arrows, 'General Client Comments' (text area), 'Sexual Orientation', 'Religious Preference', 'English Fluency', 'Preferred Language', 'Interpreter Needed', 'Veteran Status' (02-No), and 'Citizenship'. At the bottom right, there are 'Cancel', 'Save', and 'Finish' buttons, along with left and right arrow buttons, with the right arrow button highlighted in red.

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.

17.18.0
WITS Maine-WITS Training
User: Ferrante, Maria | Location: Test Provider Agency, Facility 1
Client: Duckie, Rubber | M449584UD977110
Home Page
Agency
Group List
Clinical Dashboard
Client List
Client Profile
Alternate Names
Additional Information
Contact Info
Collateral Contacts
Other Numbers
History
Allergies
Linked Consents
Non-Episode Contact
Contact Info
Home Phone # Preferred Method of Contact
Work Phone #
Mobile #
Other Phone #
Fax #
Email Address
Addresses
Add Address
Actions Address Type Address Confidential Created Updated
Cancel Save Finish

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

17.7.0
WITS Maine-WITS Training
User: Jones, Ashley | Location: ATR4 Coordinator Agency, ATR4 Coordinator Facility
Client: Doe, John | P902188RG881433
Home Page
Agency
Group List
Clinical Dashboard
Client List
Client Profile
Alternate Names
Additional Information
Contact Info
Address Information
Address Type Confidential No
Address Line 1
Address Line 2
City State MA Zip
Cancel Finish

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.

17.11.0
wits Maine-WITS Training Logout

User: Obrien, Kate | Location: Test Provider Agency, Facility 1 | Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | Clear Client

Actions	First Name	Last Name	Relation	Phone Numbers	Can Contact?
	Dr	Jones	Physician		Yes

[Add Contact](#)

First Name:
Last Name:
Relation:
Gender:
Date of Birth: SSN:
Home Phone:
Work Phone:
Mobile:
Fax:
Other:
Legal Guardian:
Active Date: 2/4/2015
Inactive Date:

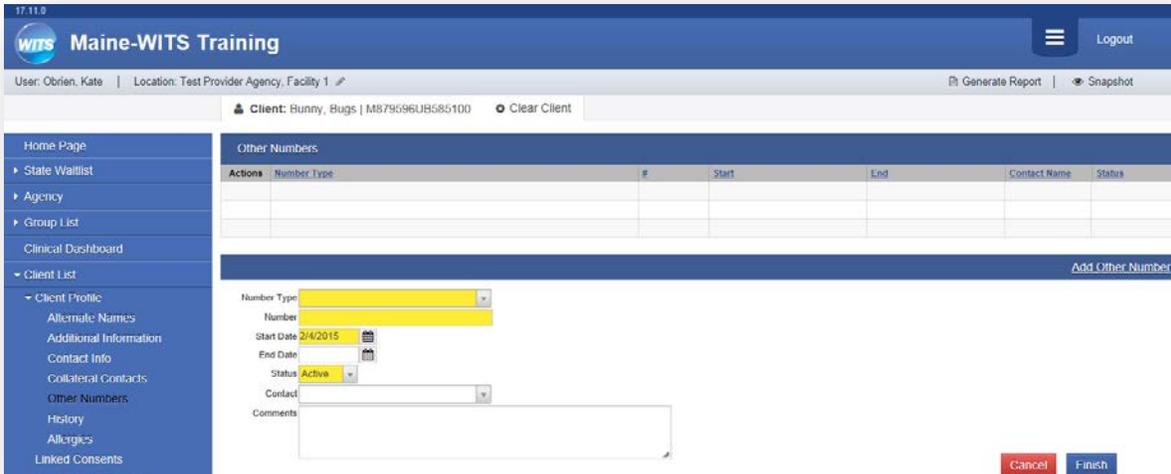
Address 1:
Address 2:
City: State: Zip:
Email:
Can Contact: Consent On File:
Notes:
Created:
Last Update:

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.

Home Page	Client History (Export)		
	Date Changed	Staff Person	Description of Changes
▶ State Waitlist	3/27/2015 6:06 PM	O'Brien, Kate	• Accessed Admission Screen for Case: 1
▶ Agency	3/27/2015 1:21 PM	O'Brien, Kate	• Accessed Client Profile Screen
▶ Group List	3/27/2015 1:21 PM	O'Brien, Kate	• Accessed Client Record: "789654, TDS, Client ID: M57975187287100"
Clinical Dashboard	3/25/2015 1:53 PM	Rogers, Anne	• Accessed Client Record: "789654, TDS, Client ID: M57975187287100"
▼ Client List	3/25/2015 1:53 PM	Rogers, Anne	• Accessed Client Profile Screen
▼ Client Profile	3/24/2015 9:04 PM	O'Brien, Kate	• Accessed Discharge Screen for Case: 1
Alternate Names	3/24/2015 2:22 PM	O'Brien, Kate	• Accessed Client Record: "789654, TDS, Client ID: M57975187287100"
Additional Information	3/20/2015 1:40 PM	O'Brien, Kate	• Accessed Linked Consents List
Contact Info	3/20/2015 1:31 PM	O'Brien, Kate	• Referral was added.
Collateral Contacts	3/20/2015 1:30 PM	O'Brien, Kate	• Accessed Referral Screen for Case: 1
Other Numbers	3/20/2015 1:24 PM	O'Brien, Kate	• Accessed Client Profile Screen
History	3/20/2015 1:24 PM	O'Brien, Kate	• Accessed Client Record: "789654, TDS, Client ID: M57975187287100"
	3/10/2015 3:36 PM	022, Training	• Accessed ClientDiagnosis for Case: 1

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.

The screenshot shows the Maine-WITS Training interface. The top navigation bar includes the WITS logo, the text 'Maine-WITS Training', a hamburger menu icon, and a 'Logout' button. Below the navigation bar, the user information is displayed: 'User: O'Brien, Kate | Location: Training Agency A, Training Facility A' and a 'Snapshot' icon. The main content area shows the client information: 'Client: Grass, Green | M369835RG427110' and a 'Clear Client' button. A blue information banner reads: 'Please select a case, or click Start New Episode.' Below this is the 'Episode List' table with columns: 'Actions', 'Case #', 'Status', 'Facility', 'Intake By', 'Intake Date', 'Closed Date', and 'Latest PE'. The 'Start New Episode' button is highlighted with a red box.

Actions	Case #	Status	Facility	Intake By	Intake Date	Closed Date	Latest PE

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 performing 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.

The screenshot shows the 'Intake Case Information' form in the Maine-WITS Training system. The form is populated with the following data:

- Intake Facility: Facility 1
- Intake Staff: Ferrante, Maria
- Initial Contact: [Blank]
- County: HK Hancock
- Source of Referral: 06-Physician
- Case #: [Blank]
- Case Status: Open Active
- Initial Contact Date: 4/1/2015
- Intake Date: 5/18/2015
- Pregnant: Not Applicable
- Due Date: [Blank]
- Referral Contact: Add Collateral Contact
- Plenatal Treatment: [Blank]
- HIV Positive: No
- Hep C Positive: No
- Injection Drug User: Never
- Shared Needles: [Blank]
- Problem Area: 01-Substance Abuse Only
- Presenting Problem (in Client's Own Words): [Blank]

At the bottom of the form, there are buttons for 'Cancel', 'Save', and 'Finish'.

The screenshot shows the 'Client Activity List' screen for a client named 'Phone, Cell | M549031HP207110 | 1'. The table below shows the activity history:

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	5/18/2015	5/21/2015	Completed
	Intake Transaction	5/18/2015	5/21/2015	Completed

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.

The screenshot displays the 'Maine-WITS Training' interface. The top navigation bar includes the WITS logo, the user name 'O'Brien, Kate', the location 'Training Agency A, Training Facility A', and options for 'Generate Report' and 'Snapshot'. The left sidebar shows a navigation menu with 'Client List' expanded to 'Activity List', where 'Intake' is selected. The main content area is titled 'Intake Case Information' and contains several fields: 'Intake Facility' (Training Facility A), 'Intake Staff' (O'Brien, Kate), 'Initial Contact' (empty), 'County' (AK-Aroostook), 'Source of Referral' (01-Self), 'Referral Contact' (empty), 'Case #' (1), 'Case Status' (Open Active), 'Initial Contact Date' (5/18/2015), 'Intake Date' (5/18/2015), 'Pregnant' (Not Applicable), 'Due Date' (empty), 'Prenatal Treatment' (empty), 'HIV Positive' (No), 'Hep C Positive' (No), 'Injection Drug User' (Never), 'Shared Needles' (empty), 'Problem Area' (01-Substance Abuse Only), and 'Presenting Problem (in Client's Own Words)' (empty). Below these fields are three sections for 'Special Initiative', 'Type of Insurance', and 'Inter-Agency Service', each with a list of options and a 'Selected' field. At the bottom, there is a 'Date Closed' field with a calendar icon, a 'Save & Close the Case' link, and three buttons: 'Cancel', 'Save', and 'Finish'.

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.

17:21:0

WITS Maine-WITS Training Logout

User: O'Brien, Kate | Location: Training Agency A, Training Facility A Generate Report | Snapshot

Client: Phone, Cell | M549031HP207110 | 1 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
 - Diagnosis List
 - ▶ Encounters
 - ▶ Notes
 - ▶ ASAM
 - ▶ Treatment
 - ▶ Follow-up
 - ▶ Discharge
 - Consent
 - Referrals
 - Payments
 - Episode List

Intake Case Information

Intake Facility Training Facility A	Case # 1
Intake Staff O'Brien, Kate	Case Status Closed
Initial Contact	Initial Contact Date 5/18/2015
County AK-Aroostook	Intake Date 5/18/2015
Source of Referral 01-Self	Pregnant Not Applicable Due Date
Referral Contact	Prenatal Treatment
	HIV Positive No Hep C Positive No
	Injection Drug User Never Shared Needles
	Problem Area 01-Substance Abuse Only
	Presenting Problem (In Client's Own Words)

Special Initiative Acquired Brain Disorders Adult with Organic Disorder w/o SED Adult with Severe and Persistent Mental Illness Adult with Severe Emotional Disturbance	Special Initiative Selected
Type of Insurance 01-Private Insurance 02-Blue Cross/Blue Shield 03-Medicare 04-MaineCare (Medicaid)	Type of Insurance Selected
Inter-Agency Service Child Protective Services (OCS) Court/Legal Interface DCSF Developmental Disabilities	Inter-Agency Service Selected

Date Closed 5/18/2015 [Re-Open Case](#)

Finish

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.

Maine-WITS Training | User: Obrien, Kate | Location: Test Provider Agency, Facility 1 | Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 | Clear Client

Admission Profile

Full Name: Bunny, Bugs | Residence/Borough: Aroostook
 Referral Source: Self | Race: Unknown
 Gender: Male | Ethnicity: Not Hispanic or Latino
 DOB: 8/7/1955 | Age: 59

Basis for Decision
 Potential Client for SA: [Dropdown]
 Potential Client for MH: [Dropdown]
 Potential Client for TBI: [Dropdown]
 Est. Duration of TX (days): [Input] | Treating Here For: SA [Dropdown]

Client Type: [Dropdown]
 Admission Type: Admission [Dropdown]
 Admission Staff: Obrien, Kate [Dropdown]
 Admission Date: 2/4/2015 [Calendar]
 Affected/Co-Dependent: No [Dropdown]

of Prior SA TX Admissions: 0 [Input]
 # of SA Hospitalizations in Past 6 Months: [Input]
 # of Prior MH TX Admissions in Past 12 Mo: 0 [Input]
 # of Prior MH Hospitalizations in Past 2 Yrs: 0 [Input]
 # of Months Since Last Discharge: [Input]
 # Medical Tx at Physician/Clinic in Past 12 Mo: 0 [Input]
 # Hospital Emergency Room Admissions in Past 12 Mo: 0 [Input]
 # Medical Hospital Inpatient Admission in Past 12 Mo: 0 [Input]
 # Other Medical Tx Locations Admission in Past 12 Mo: 0 [Input]

of times the client has attended a self-help program in the 30 days preceding the date of admission to treatment services. Includes attendance at AA, NA, and other self-help/mutual support groups focused on recovery from substance abuse and dependence
 05-16-30 times in past month [Dropdown]

In your lifetime, how many times have you gambled (bet) with money or possessions?
 10-19 Times [Dropdown]

Has the money or time that you spent on gambling led to financial problems or problems in your family, work, school or personal life?
 Yes [Dropdown]

Client Reported Health Status: [Dropdown]
 MH/MR Diagnosis: 00-None [Dropdown]
 Education: 4 Years completed [Dropdown]
 Domestic Violence Survivor?: Yes [Dropdown]

Buttons: Cancel Save Finish [Right Arrow]

Financial Household Screen:

- 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.)
- Click on the **right arrow** button to continue entering client information.
- When you click on the **right arrow** button, you are taken to the **Youth** screen.

17.11.0
Maine-WITS Training
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

Admission

Financial Info

Employment Status: Not in Labor Force - Disabled | Primary Income Src: Disability
Months Emp in Last 6 Months: | Expected Payment Src: Blue Cross/Blue Shield
Employer: | Insurance Type: 05-Health Maintenance Organization (HMO)
Annual Household Income: |

Other Income Sources
00-None | 01-Wages | 02-Retirement | Other Income Sources Selected: |

Household Composition
Household Composition: | Marital Status: 01-Never Married
Living Arrangement: 04-Homeless | # of People Living With Client: |

Relation to Client
Aunt(s) | Brother(s) | Daughter(s) | Living with Client: |

of Dependents (by Age Group)
0-12 Months: | 13-35 Months: | 3-5 Years: | 6-12 Years: | 13-17 Years: |
If the Client has dependent children, where are the children while the client was in treatment?: |

Cancel Save Finish ← →

Youth Screen:

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

The screenshot displays the Maine-WITS Training web application. At the top, the header includes the WITS logo, the text 'Maine-WITS Training', and a 'Logout' button. Below the header, a navigation bar shows the user 'O'Brien, Kate' and the location 'Test Provider Agency, Facility 1'. A secondary bar identifies the client as 'Bunny, Bugs' with ID 'M879596UB585100 | 2' and a 'Clear Client' button. On the left is a blue sidebar menu with options like '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', and 'Youth'. The main content area is titled 'Admission' and contains a 'Youth Admission' section with dropdown menus for 'Client is a Student' and 'Client is a Gang Member', and input fields for 'Guardian Name', 'Guardian Type', 'School Name', 'School Contact', 'Attending Grade', 'Current GPA', 'Days Suspended in Last 30 Days', and 'Days Absent in Last 30 Days'. Below this is a 'POSIT Scores' section with a grid of input fields for various scores: Substance Abuse Score, Peer Score, Leisure Recreational Score, Physical Health Score, Education Status Score, Aggression Score, Mental Health Score, Vocational Status Score, HIV Risk Score, POSIT Family Score, and Social Skill Score. At the bottom of the POSIT Scores section are buttons for 'Cancel', 'Save', 'Finish', and navigation arrows.

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.

17.11.0
WITS Maine-WITS Training Logout

User: O'Brien, 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

Admission

Substance Abuse

Rank	Substance	Severity	Frequency	Method	Detailed Drug Code
Primary:	01-Alcohol		02-1-3 times in the ...	01-Oral	0201-Alcohol
Secondary:	03-Cocaine/Crack		03-1-2 times in the ...	01-Oral	0301-Crack
Tertiary:	00-None	N/A	00-Not Applicable	00-Not Applicable	9996-N/A

At what age did the client FIRST use the substances indicated above (if unknown, enter '97')
Primary: 15 Secondary: 20 Tertiary: 96

of DAYS since LAST use of the substances indicated above: Primary: Secondary: Tertiary:

of Days Abstinent in Last 30 Days:

of Days in Support Group in Last 30 Days:

of Days Attended AA/NA/Similar Meetings in Last 30 Days:

Other Addictions: Alcohol ▶

Selected Other Addictions: ◀

Medication Assisted Tx?

Pharmacotherapy Planned

Comments:

Cancel
Save
Finish
◀
▶

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.

17.11.0

WITS Maine-WITS Training Logout

User: O'Brien, 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

Tobacco / Nicotine

Does Client Currently Use Tobacco? Yes

Smoker Status Current every day smoker

Age of First Use 11

In the past 30 days, what tobacco/nicotine product did you use most frequently? Cigarettes

Other (Please Describe)

In the past 30 days, how often did you use tobacco/nicotine product(s)? About 1 pack/can/pouch...

Route of Administration 02-Smoking

Cancel
Save
Finish
←
→

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.

17.11.0
WITS Maine-WITS Training Logout

User: Obrien, Kate | Location: Test Provider Agency, Facility 1 Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 Clear Client

Admission

Legal History

Legal Status: 00-No Legal Involvement, 01-Probation/Parole, 02-Furloughed, 03-Awaiting Court
 Selected Legal Status: None/No Involvement*

Domestic Violence Offender? Yes
 # of Arrests in Lifetime:
 # of Arrests in Past 12 Months: 1
 # of Arrests in Past 30 Days: 1

of OUI Arrests in Past 12 Months: 0

Will Client Use Tx/Evaluation to Satisfy DEEP Requirements? Yes
 DEEP Status: Multiple Offender

Cancel Save Finish ← →

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.

17.11.0

wits Maine-WITS Training ☰ Logout

User: O'Brien, 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

Admission

Assessment Scores

Medical

Employment

Drug

Alcohol

Legal

Family

Psychiatric

Controlled Environment

[Load Latest Assessment Scores](#)

[Clear Assessment Scores](#)

Cancel Save Finish ← →

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.



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	Level of Risk	Level of Care	Comments
1 - Acute Intoxication and/or Withdrawal Potential	1	1.0	
2 - Biomedical Conditions and Complications			
3 - Emotional, Behavioral, or Cognitive Conditions and Complications			
4 - Readiness to Change			
5 - Relapse, Continued Use, or Continued Problem Potential			
6 - Recovery / Living Environment			

Recommended Level of Care: 1.0
Actual Level of Care: 1.0

Clinical Override: Lack of insurance benefits

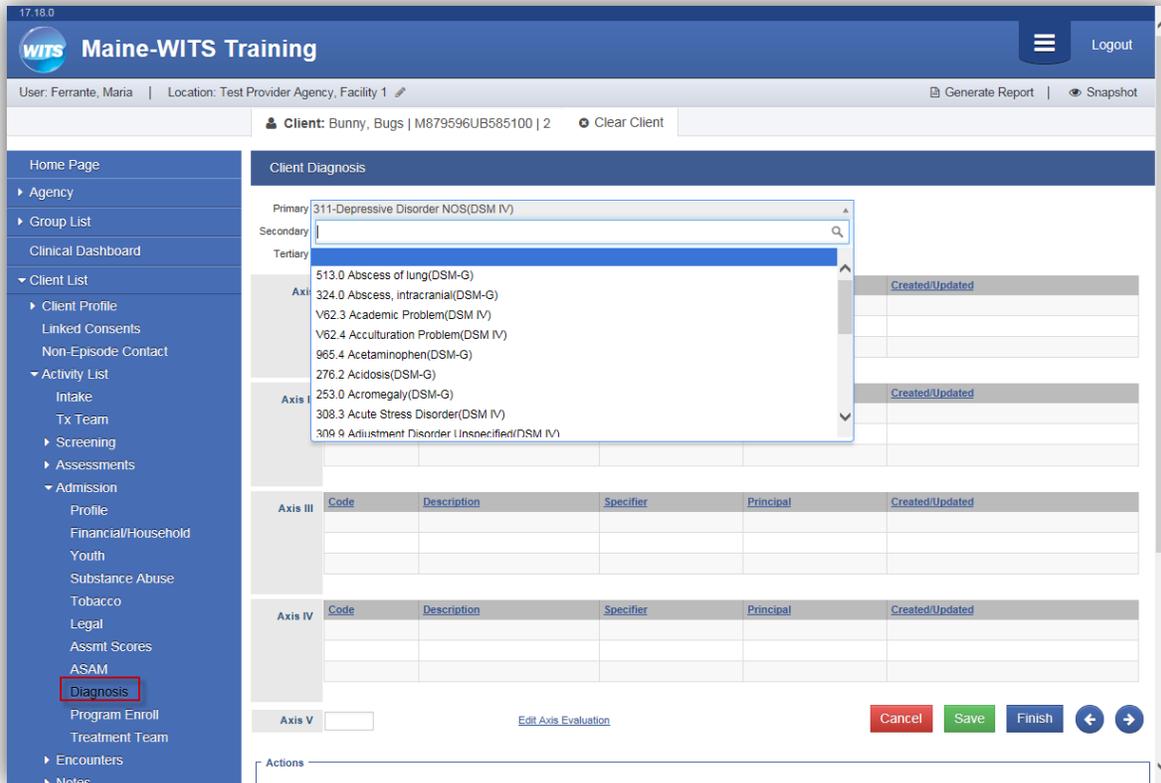
Comments: [Text Area]

ASAM Notes

Buttons: Cancel, Save, Finish, Left Arrow, Right Arrow

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.

17.11.0

wits Maine-WITS Training Logout

User: Obrien, Kate | Location: Test Provider Agency, Facility 1 Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 Clear Client

Program Enrollment [Add Enrollment](#)

Actions	Program Name	Start Date	End Date	Facility	Notes
	Intensive Outpatient	2/4/2015		Facility 1	

Finish ← →

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

Program Enrollment Profile

Facility: Facility 1 Days on Wait List: Start Date: 2/18/2015

Program Name: End Date:

Program Staff: Obrien, Kate Agreement #:

Termination Reason:

Notes:

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

Program Enrollment Profile

Facility: Facility 1 Days on Wait List: Start Date: 2/18/2015

Program Name: Intensive Outpatient End Date:

Program Staff: Obrien, Kate Agreement #:

Termination Reason:

Notes:

TEDS/NOMS Status at Program Enrollment (2/18/2015)

Enrollment Type: Transfer/Change DSM Diagnosis:

of Arrests in Last 30 Days: 1 Marital Status: 01-Never Married Primary Income Src: Disability

Pregnant at Enrollment: Not Applicable Living Arrangement: 04-Homeless Expected Payment Src: Blue Cross/Blue Shield

Methadone Used as Part of Tx: Yes Employment Status: Not in Labor Force - Disabled Health Insurance: 05-Health Maintenance Organi...

Psychiatric Problem in Addition to Alcohol/Drug Problem: 00-None Highest Education Level Completed: 4 Years completed

of Times You Have Participated in a Self Help Group in the Last 30 Days: 05-16-30 times in past month

Primary Drug	Secondary Drug	Tertiary Drug
Drug Type: 01-Alcohol	03-Cocaine/Crack	00-None
Detailed Drug: 0201-Alcohol	0301-Crack	9996-N/A
Freq of Use: 02-1-3 times in the past mor	03-1-2 times in the past wee	00-Not Applicable
Route of Intake: 01-Oral	01-Oral	00-Not Applicable
Age of First Use: 15	20	96

Actions: Complete TEDS/NOMS Disenroll Status [Enroll in Concurrent Program](#)

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.

17.21.0
Maine-WITS Training
User: O'Brien, Kate | Location: Training Agency A, Training Facility A | Snapshot
Client: Phone, Cell | M549031HP207110 | 1 | Clear Client

This is the initial admission. The enrollment/admission status values are collected on Admission screens.

Program Enrollment Profile

Facility: Training Facility A | Days on Wait List: | Start Date: 5/21/2015
Program Name: Extended Outpatient #2 | End Date: 5/21/2015
Program Staff: O'Brien, Kate | Agreement #: |
Termination Reason: 02-Treatment is Complete
Notes: |

TEDS/NOMS Status at Program Enrollment (5/21/2015)

Enrollment Type	Initial Admission	DSM Diagnosis		Marital Status	01-Never Married	Primary Income Src	01-Wages
# of Arrests in Last 30 Days	0			Living Arrangement	01-Independent Living, Alone, etc.	Expected Payment Src	08-Blue Cross/Blue Shield
Pregnant at Enrollment	Not Applicable			Employment Status	01-Full Time: >35 Hours	Health Insurance	02-Blue Cross/Blue Shield
Methadone Used as Part of Tx	No			Highest Education Level Completed	17-Masters 1		
Psychiatric Problem in Addition to Alcohol/Drug Problem	01-Diagnosed Mer						
# of Times You Have Participated in a Self Help Group in the Last 30 Days	01-No attendance in the past month						
Primary Drug	01-Alcohol	Secondary Drug	00-None	Tertiary Drug	00-None		
Detailed Drug	0100-Alcohol		0000-None		0000-None		
Freq of Use	03-Once in Last 30 days		00-Not Applicable		00-Not Applicable		
Route of Intake	01-Oral		00-Not Applicable		00-Not Applicable		
Age of First Use	15		96		96		

Actions
[Complete TEDS/NOMS Disenroll Status](#) | [Enroll in Concurrent Program](#)
Cancel Save Finish

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.

The screenshot displays the 'Maine-WITS Training' interface. The top navigation bar includes the WITS logo, the title 'Maine-WITS Training', and a 'Logout' button. Below this, the user information 'User: O'Brien, Kate' and 'Location: Training Agency A, Training Facility A' is shown. The main content area is titled 'TEDS/NOMS Status at Program Disenrollment (5/21/2015)'. It features several dropdown menus and input fields for client information: 'Disenrollment Type' (02-Treatment is Complete), 'Agreement #' (empty), 'Last Face-to-Face Contact Date' (5/21/2015), 'Employment Status' (01-Full Time: >35 Hours), and 'Living Arrangement' (01-Independent Living, Alone, etc.). There are also fields for '# of Arrests in the Prior 30 Days' (0) and '# of Times You Have Participated in a Self Help Group in the Last 30 Days' (01-No attendance in the past month). A section for drug use includes 'Primary Drug' (01-Alcohol), 'Secondary Drug' (00-None), and 'Tertiary Drug' (00-None), along with their respective 'Frequency of Use' (03-Once in Last 30 days, 00-Not Applicable, 00-Not Applicable). At the bottom, an 'Actions' box contains 'Discharge Client' and 'Transfer to another program' links, and a row of buttons: 'Cancel', 'Save', 'Finish', and a back arrow.

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.

The screenshot displays the 'Maine-WITS Training' web application. The top navigation bar includes the WITS logo, the title 'Maine-WITS Training', and a 'Logout' button. Below the navigation bar, the user's name 'User: O'Brien, Kate' and location 'Location: Training Agency A, Training Facility A' are shown. The main content area is titled 'Encounter Search' and contains several search filters: 'Start Date' (5/21/2014), 'End Date' (5/21/2015), 'Rendering Staff', 'Encounter Status', 'Service', and 'Program'. There are 'Clear' and 'Go' buttons at the bottom right of the search area. Below the search filters is a table titled 'Encounter List (Export)' with columns for 'Actions', 'Enc Date', 'Service', 'ENC_ID', 'Rendering Staff', 'Program Name', and 'Status'. The table contains one row of data: '3/18/2015', 'Intensive Outpatient', '1084', '052, Training', 'Intensive Outpatient #1', and 'Non Billable'. An 'Add Encounter Record' button is located at the top right of the table.

[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.

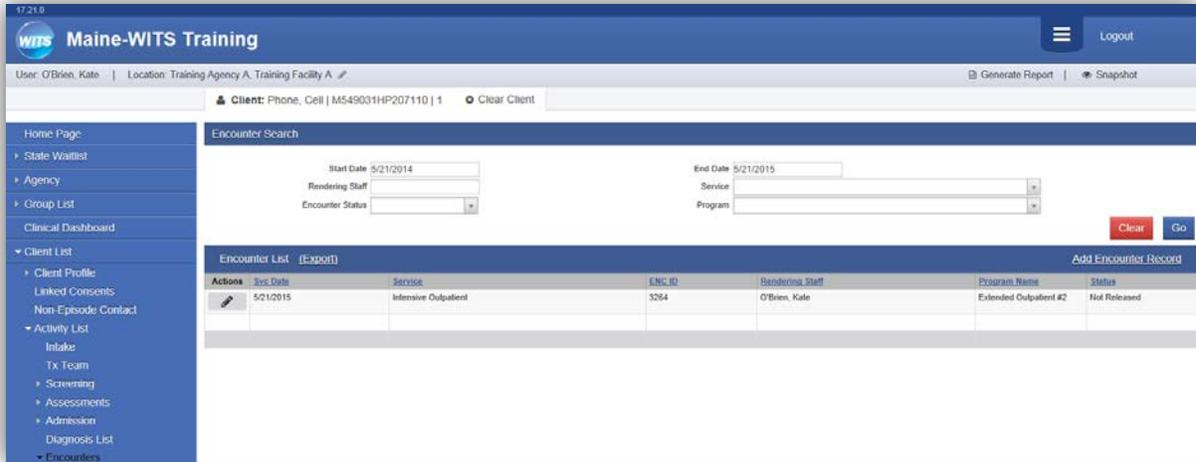
The screenshot displays the 'Encounter' form in the Maine-WITS Training system. The form includes the following fields and sections:

- Note Type:** Progress Notes
- ENC ID:** [Blank]
- Service:** [Blank]
- Program Name:** [Blank]
- Service Location:** [Blank]
- Start Date:** [Blank]
- End Date:** [Blank]
- Start Time:** [Blank]
- End Time:** [Blank]
- Duration:** [Blank]
- Emergency:** [Blank]
- Pregnant:** No
- # of Service Units/Sessions:** [Blank]
- Charge:** [Blank]
- Diagnoses for this Service:**
 - Primary: 311-Depressive Disorder NOS(DSM IV)
 - Secondary: [Blank]
 - Tertiary: [Blank]
- Rendering Staff:** Ferrante, Maria
- Supervising Staff:** [Blank]
- Referring Phys:** [Blank]
- Administrative Actions:** Finalize Encounter

At the bottom of the form, there are four buttons: Cancel (red), Save (green), Finish (blue), and a right arrow button (blue).

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**.

The screenshot displays the 'Encounter' form in the WITS Maine-WITS Training system. The interface includes a top navigation bar with the WITS logo and 'Maine-WITS Training' text. Below this, a user header shows 'User: Ferrante, Maria' and 'Location: Test Provider Agency, Facility 1'. A client header identifies the client as 'Bunny, Bugs' with ID 'M879596UB585100 | 2'. The left sidebar contains a navigation menu with options like 'Home Page', 'Agency', 'Group List', 'Clinical Dashboard', 'Client List', and 'Encounters'. The main form area is titled 'Encounter' and contains various input fields: 'Note Type' (Progress Notes), 'ENC ID' (2221), 'Service' (Hospital), 'Program Name' (Facility 1/Intensive Outpatient), 'Start Date' (4/22/2015), 'End Date', 'Start Time', 'End Time', 'Duration', 'Emergency' (checkbox), 'Pregnant' (No), and 'Charge' (\$10.00). A 'Diagnoses for this Service' section lists 'Primary: 311-Depressive Disorder NOS(DSM IV)'. At the bottom, an 'Administrative Actions' box highlights 'Delete' and 'Finalize Encounter' links, with 'Finalize Encounter' being the primary action. Buttons for 'Cancel', 'Save', 'Finish', and a right arrow are also present.

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.

17.18.0
WITS Maine-WITS Training Logout

User: Ferrante, Maria | Location: Test Provider Agency, Facility 1 Generate Report | Snapshot

Client: Bunny, Hop | M299879UB867110 | 1 Clear Client

Home Page

- ▶ Agency
- ▶ Group List
- Clinical Dashboard
- ▼ Client List
 - ▶ Client Profile
 - Linked Consents
 - Non-Episode Contact
 - ▼ Activity List
 - Intake
 - Tx Team
 - ▶ Screening
 - ▶ Assessments
 - ▶ Admission
 - ▶ Encounters

Encounter Search

Start Date: 4/24/2014 End Date: 4/24/2015

Rendering Staff: Service:

Encounter Status: Program:

Clear Go

Encounter List (Export) Add Encounter Record

Actions	Svc. Date	Service	ENC ID	Rendering Staff	Program Name	Status
Review	1/9/2015	Intensive Outpatient Treatment	1	Schnoor, Kory	Intensive Outpatient	Non Billable

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**.

17.18.0
WITS Maine-WITS Training Logout

User: Ferrante, Maria | Location: Test Provider Agency, Facility 1 Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 Clear Client

Home Page

- ▶ Agency
- ▶ Group List
- Clinical Dashboard
- ▼ Client List
 - ▶ Client Profile
 - Linked Consents
 - Non-Episode Contact
 - ▼ Activity List
 - Intake
 - Tx Team
 - ▶ Screening
 - ▶ Assessments
 - ▶ Admission
 - ▼ Encounters
 - Profile
 - Encounter Note
 - ▶ Notes
 - ▶ ASAM
 - ▶ Treatment
 - ▶ Follow-up
 - ▶ Discharge
 - Consent
 - Referrals

Encounter

Note Type: Progress Notes Created Date: 4/23/2015 5:02 PM

ENC ID: 2221

Service: Hospital (Other than Detoxification)

Program Name: Facility 1/Intensive Outpatient : 2/20/2015 -

Start Date: 4/22/2015 End Date:

Service Location: Start Time: End Time:

Duration: # of Service Units/Sessions: 2

Emergency: Pregnant: No Charge: \$10.00

Diagnoses for this Service

Primary: 311-Depressive Disorder NOS(DSM IV)

Secondary:

Tertiary:

Rendering Staff: Ferrante, Maria

Supervising Staff:

Referring Phys:

Administrative Actions

[Delete](#) [Reopen Encounter](#)

Cancel
 Save
 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.

User: O'Brien, Kate | Location: Test Provider Agency, Facility 1 | Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 | Clear Client

Discharge Profile

Discharged: 2/19/2015 | Date of Last Contact: []

Discharge Staff: O'Brien, Kate | Discharge Referral: []

Reason: []

"Deliberate" Referrals (Other Than SA Tx): []

of times the client has attended a self-help program in the 30 days preceding the date of discharge from treatment services. Includes attendance at AA, NA, and other self-help/mutual support groups focused on recovery from substance abuse and dependence. []

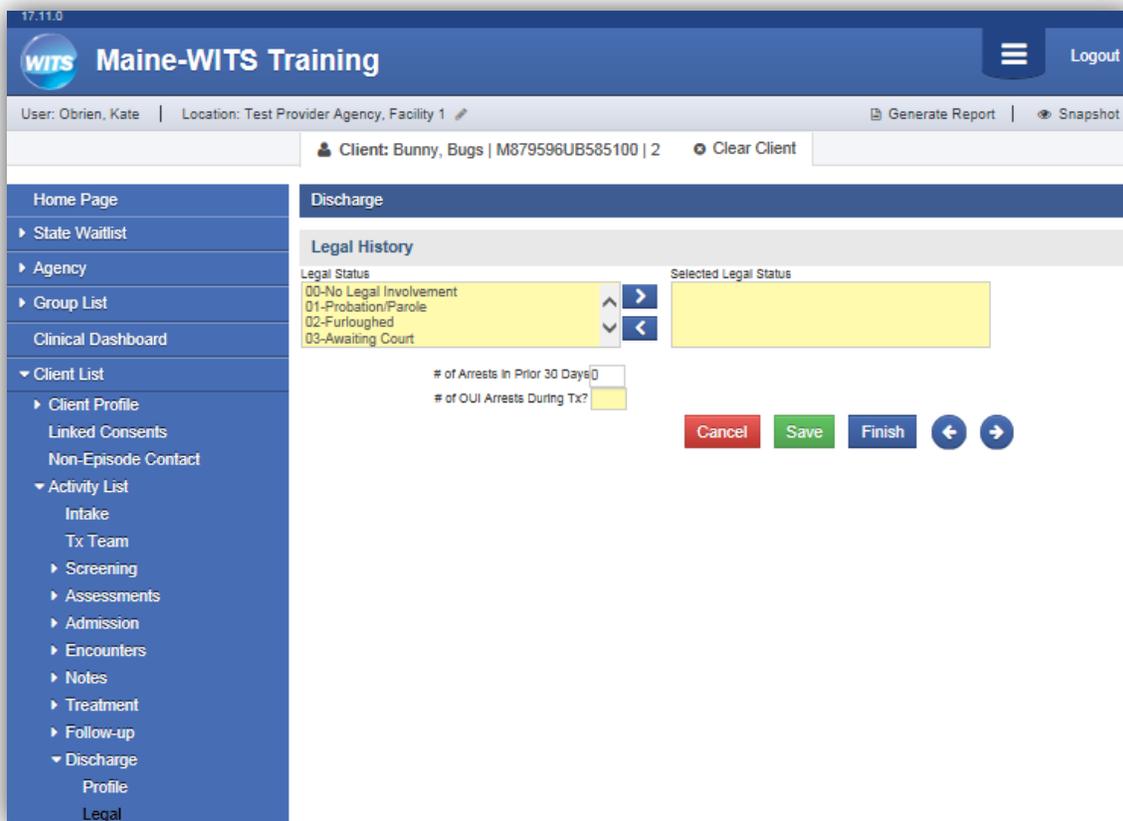
Did you recommend a self-help group? [] | Type of Therapy: []

Dimension	Level of Risk	Level of Care	Comments
1 - Acute Intoxication and/or Withdrawal Potential	At Intake: []	1.0	[]
	At Discharge: []	[]	[]
2 - Biomedical Conditions and Complications	At Intake: []	[]	[]
	At Discharge: []	[]	[]
3 - Emotional, Behavioral, or Cognitive Conditions and Complications	At Intake: []	[]	[]
	At Discharge: []	[]	[]
4 - Readiness to Change	At Intake: []	[]	[]
	At Discharge: []	[]	[]
5 - Relapse, Continued Use, or Continued Problem Potential	At Intake: []	[]	[]
	At Discharge: []	[]	[]
6 - Recovery / Living Environment	At Intake: []	[]	[]
	At Discharge: []	[]	[]

Cancel Save Finish →

Legal Screen:

- 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.
- 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 **save** and use the blue navigation arrow buttons to continue navigating through the discharge screens.

17.11.0

WITS Maine-WITS Training Logout

User: O'Brien, Kate | Location: Test Provider Agency, Facility 1 Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 Clear Client

Home Page

▶ State Waitlist

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 Non-Episode Contact

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 Profile

 Legal

 Status

 Substance Abuse

 Tobacco

 Tx Summary

 Diagnosis

 Consent

 Referrals

 Payments

 Episode List

▶ System Administration

▶ My Settings

Reports

Discharge

Status Changes Since Admission

Status At Admission

Pregnant

Marital Status

Living Arrangement

Employment Status

Primary Payment Source

Health Insurance

County of Residence

If the Client has dependent children, where are the children while the client was in treatment?

Status At Discharge

Pregnant

Marital Status

Living Arrangement

Employment Status

Primary Payment Source

Secondary Payment Source

Tertiary Payment Source

Health Insurance

County of Residence

Where were the Dependent Children While the Client was in Tx?

Participated In School or Training while in Tx?

Cancel
Save
Finish
←
→

Substance Abuse Screen:

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

17.11.0

WITS Maine-WITS Training Logout

User: O'Brien, Kate | Location: Test Provider Agency, Facility 1 Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 Clear Client

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▶ Substance Abuse

Discharge

Substance Abuse

Rank	Substance	Severity	Frequency	Method
Primary:	01-Alcohol		03-Once in Last 30...	01-Oral
Secondary:	03-Cocaine/Crack		02-No Use Past Mo...	02-Smoking
Tertiary:	00-None	N/A	00-Not Applicable	00-Not Applicable

Was Methadone Maintenance Part of TX? Medication Assisted Tx?

Discharge Parameters

Discharge Status: <input type="text" value="Treatment"/>	Has the degree of presenting physical or psychological dependence on the alcohol and/or other drug substance(s) improved at discharge based on documentation in the Client's record? <input type="text" value="Yes"/>
Post-Discharge Case Management: <input type="text"/>	MH/IR Diagnosis: <input type="text" value="00-None"/>
Prognosis: <input type="text"/>	Was MH Service Received: <input type="text"/>
Was a family member involved: <input type="text"/>	Psychiatric Follow-up: <input type="text"/>
Was Concerned Person Involved: <input type="text"/>	How many psychiatric admissions to a hospital did the Client have during Tx? <input type="text" value="0"/>
Codependent/Collateral: <input type="text"/>	

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.

17.11.0

wits Maine-WITS Training Logout

User: O'Brien, Kate | Location: Test Provider Agency, Facility 1 Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 Clear Client

- Home Page
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 - ▼ Discharge
 - Profile
 - Legal
 - Status
 - Substance Abuse
 - Tobacco

Tobacco / Nicotine

Does Client Currently Use Tobacco?

Smoker Status

Age of First Use

In the past 30 days, what tobacco/nicotine product did you use most frequently?

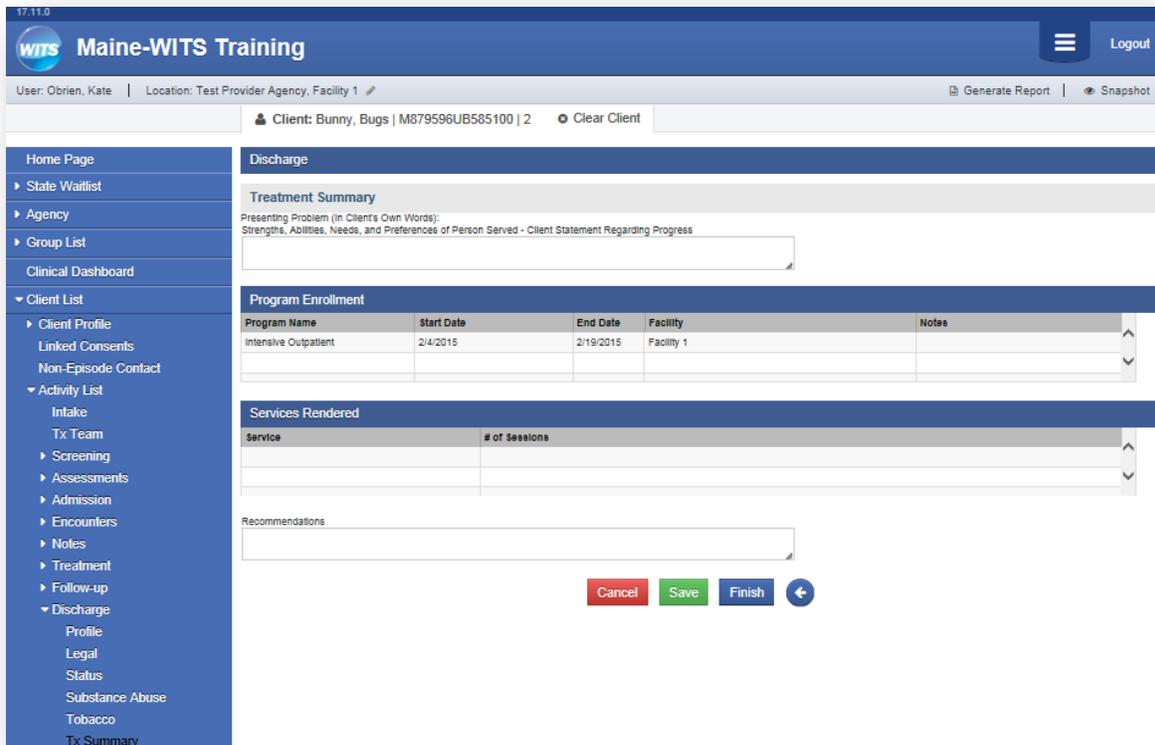
Other (Please Describe)

In the past 30 days, how often did you use tobacco/nicotine product(s)?

Route of Administration

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**.



- 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).

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 - ▶ Notes
 - ▶ Treatment
 - ▶ Follow-up
 - ▼ Discharge

Client is discharged. Do you want to close this case also?

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.

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wits Maine-WITS Training Logout
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Actions	Follow Up Type	Follow Up Status	Discharge Date	Follow Up Date

[Add New Follow Up Record](#)

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.

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wits Maine-WITS Training Logout

User: Obrien, Kate | Location: Test Provider Agency, Facility 1 Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 Clear Client

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 Profile

 Profile (Cont.)

Follow Up Profile (cont.)

Employment Status

Living Arrangements

Primary Source of Income

Arrests in Prior 30 Days

Source of Information

of Mail-Out Attempts

of Telephone Attempts

of Face-to-Face Attempts

Participated in an Education/Training Program Since Discharge

Graduated From an Education/Training Program Since Discharge

of times the client has attended a self-help program in the 30 days preceding the date of discharge from treatment services. Includes attendance at AA, NA, and other self-help/mutual support groups focused on recovery from substance abuse and dependence.

If the Client has dependent children, where are the children while the Client was in treatment?

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.

17.11.0

wits Maine-WITS Training Logout

User: Obrien, Kate | Location: Test Provider Agency, Facility 1 Generate Report | Snapshot

Client: Bunny, Bugs | M879596UB585100 | 2 Clear Client

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▶ Notes

▶ Treatment

▼ Follow-up

 Profile

 Profile (Cont.)

 Substance Abuse

 Health

Follow Up Substance Abuse

Primary Drug

Substance Used

Freq of Use Route of Admin

Secondary Drug

Substance Used

Freq of Use Route of Admin

Tertiary Drug

Substance Used

Freq of Use Route of Admin

Tobacco

Tobacco Used

Freq of Use Route of Admin

Received Substance Abuse Treatment Since Discharge

Currently in Substance Abuse Treatment

of Days in Past 30 Missed Work/School Due to Drinking/Drug Use

In the past 30 days, how often did you use tobacco/nicotine product(s)?

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

- 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**.

17.11.0
Maine-WITS Training
User: O'Brien, Kate | Location: Administrative Agency, Administrative Unit | Snapshot

Home Page
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My Settings
Reports
Support Ticket

No Protected Health Information should be entered in this module. The only exception is the Client Name field, which will not be sent when this ticket is submitted. Please make sure all screen shots have the client name removed (or blacked out).

Please fill in this form as completely and thoroughly as possible. Missing information may impact our ability to effectively investigate and resolve this issue.

Support Ticket Profile

Support Ticket ID: [Yellow] Work Item No: [Yellow] Status: Pending User

Support Ticket Type: [Yellow] Agency: [Yellow] Facility: [Yellow]

End User: [Yellow] Contact Email: [Yellow]

Client Name: [Yellow] Unique Client No: [Yellow]

Specific Screen(s) Involved?: [Yellow] Specific Field(s) Involved?: [Yellow]

Button/Action Link Involved?: [Yellow]

Occurrence Date: [Yellow] Occurrence Time (HH:MM): [Yellow]

Description: [Yellow]

Steps to Reproduce: [Yellow]

Does this happen every time in the same situation? [Yellow]

Is there an error screen associated with this problem? [Yellow]

Are you experiencing problems accessing or working with other pages on the web? [Yellow]

Cancel Save Finish

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

17.11.0
Maine-WITS Training
User: O'Brien, Kate | Location: Administrative Agency, Administrative Unit | Snapshot

Home Page
State Waitlist
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Reports
Support Ticket

There is currently 1 support ticket with status 'Pending WITS Admin'.

Home

Announcements

Actions	Summary	Posted Date	Start Date	Priority

Alert List

Actions	Alert Type	Client Name/ID	Applies To Staff	Message	Facility	Date Due

Schedule for: Start Date: 1/16/2015 End Date: [Yellow] Before/After

Actions	Start	End	Summary	Status