



PA WITS

WITS Basics User Guide

Applies to:

WITS Version 18.0+

Pennsylvania DDAP

Last Updated

July 25, 2019

Pennsylvania DDAP

PA WITS

Preface

The PA WITS system will be used by treatment providers to collect Substance Use Disorder data across the state of Pennsylvania to ensure DDAP can meet their primary objective of reporting TEDS to SAMHSA as required by the block grant. In addition to the PA WITS system collecting the data for these block grant reporting requirements, WITS will be used to help DDAP to collect additional clinical and case management data as stated in DDAP Treatment Manual.

Intended Audience

This user guide has been prepared for all PA WITS users. Topics covered include basic navigation features, system conventions, screen formations, hints, and login information.

System Requirements

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

Internet Browsers

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

- Mozilla Firefox
- Google Chrome
- Internet Explorer version 10+
- Apple Safari

Pop-up Blocker

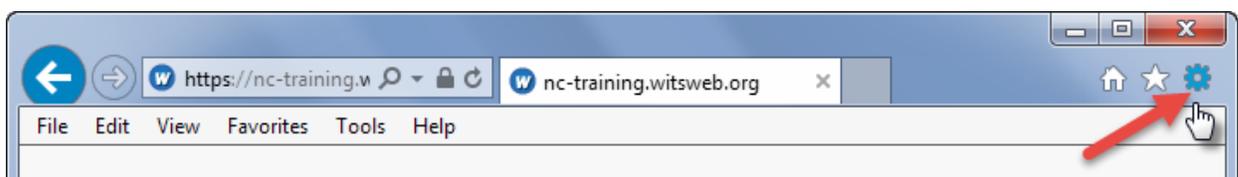
Certain features in PA WITS, such as Snapshot and Scheduler, will open in a separate browser window when selected. Make sure your browser allows pop-ups from WITS.

Update Internet Options

Add WITS sites to your browsers Trusted Sites list.

Internet Explorer:

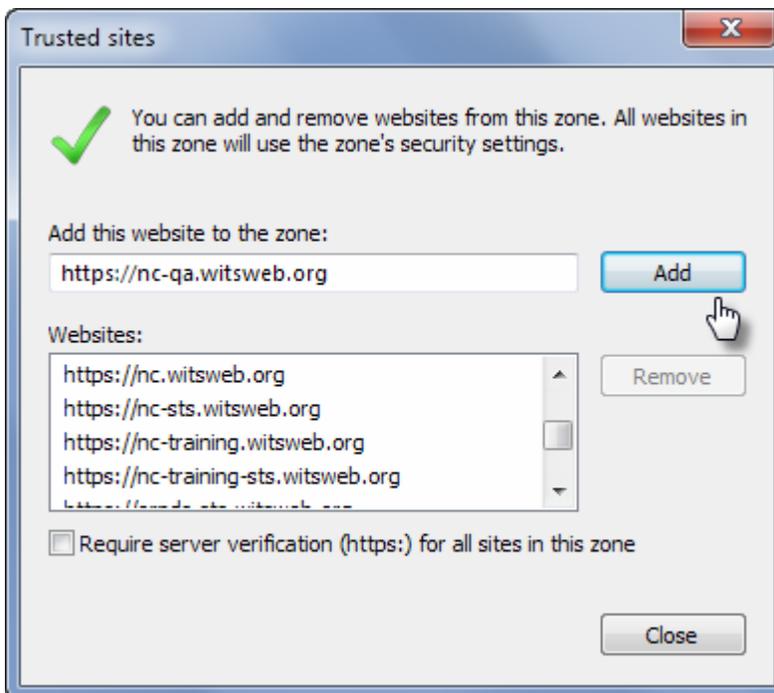
1. Open Internet Explore and then type the URL of your WITS system.
2. Click the **Tool** button.



3. Select the **Security** tab, click **Trusted Sites**, and then click the **Sites** button.



4. On the Trusted Sites dialog box, click the **Add** button and then click **Close**.



Customer URL Links

Production Site: <https://pa.witsweb.org>

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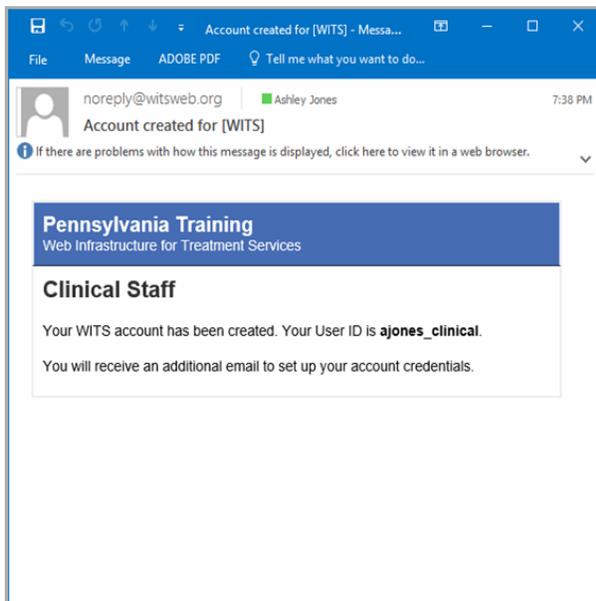
Part 1: System Access

First Time Logging In

Once your agency administrator has created your account in WITS, you will receive two email messages from noreply@witsweb.org. The first email will include your User ID and the second email will contain a link to set your credentials. Please note that this link will expire 24 hours after the email was sent. After 24 hours, please contact your system administrator to reset your credentials and a new link will be emailed to you.

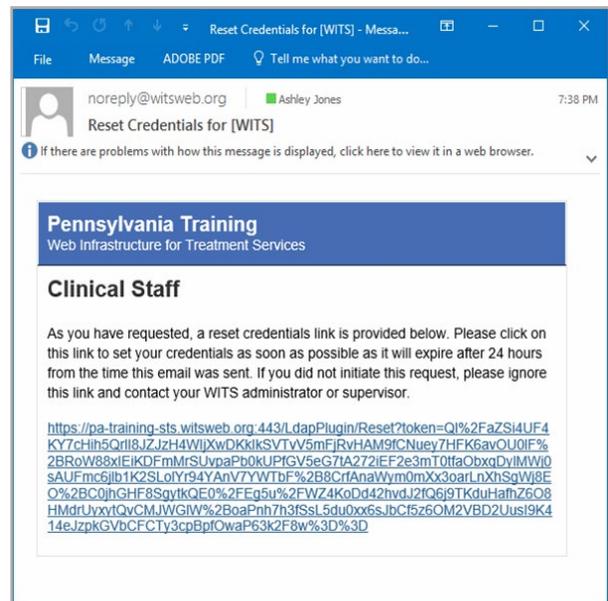
Account Created Email

- Locate User ID



Reset Credentials Email

- Click the link



NOTE • The Reset Credentials link will expire 24 hours after the email is sent.

1. Open the email with the subject line, "Account created for [WITS]" and locate your **User ID**. Keep this email open for reference as you will need your User ID to log in after setting your credentials (which is covered in the steps below).
2. Open the email with the subject line, "Reset Credentials for [WITS]" and click the **link**. This will open the Reset Credentials webpage.
3. On the Reset Credentials webpage, enter the information as shown in the table below.

Table 1-1: Reset Credentials fields

Field	Description
Display Name	Read-only field displaying your last name and first name.
Email	Read-only field displaying your primary email address.
Security Question	Select a question from the drop-down list. Note: Your Security Question will be used to help reset your credentials if you've forgotten your password/pin. Please see the " <i>Forgot Password Link</i> " section on page 5 for more information.
Answer	Type the answer to your selected Security Question. Note: Your answer is case sensitive.
Password	Your Password must have at least six (6) characters and contain at least three (3) of the following: <ul style="list-style-type: none"> • Uppercase letters • Lowercase letters • Numbers • Punctuation Note: Your Password and Pin must be different.
Confirm Password	Retype your Password.
Pin	Your Password must have at least six (6) characters and contain at least three (3) of the following: <ul style="list-style-type: none"> • Uppercase letters • Lowercase letters • Numbers • Punctuation Note: Your Password and Pin must be different.
Confirm Pin	Retype your Pin.



Reset Credentials

Display Name

Staff, Clinical

Email

ashley.jones@feisystems.com

Security Question

What year did you get married? ▾

Answer

Password

Confirm Password

Pin

Confirm Pin

Save

Show Password/Pin

Figure 1-1: First Time Logging In, Reset Credentials screen

How to Log In



Where: Internet Browser > WITS Login Screen

1. Open an Internet browser then type the URL of PA WITS: <https://pa.witsweb.org>
2. Acknowledge the warning message as shown below and then click **OK**.

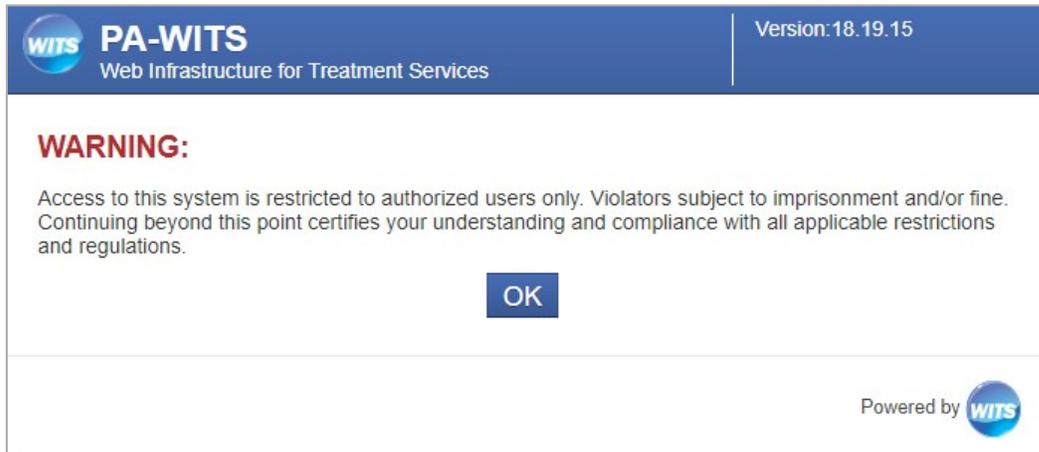


Figure 1-2: Login Warning Message screen

3. Type your **User ID**, **Password**, and **Pin**, and then click **Login**.

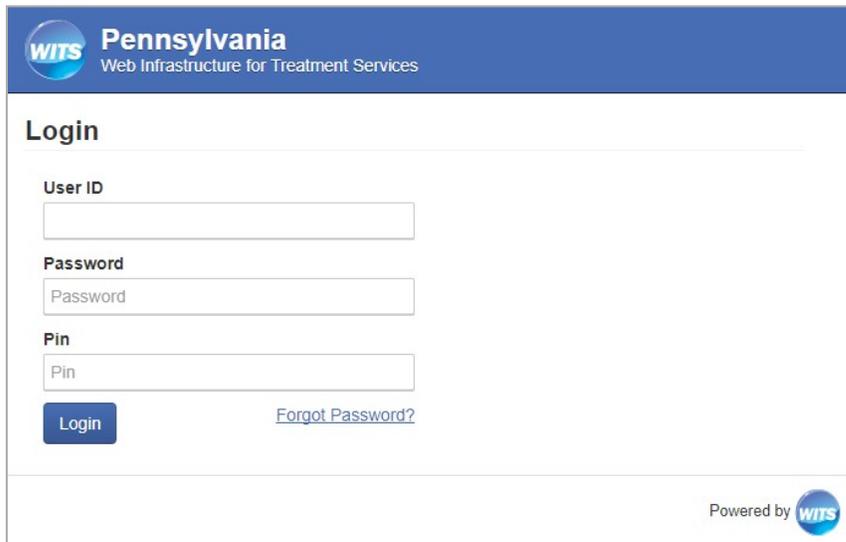
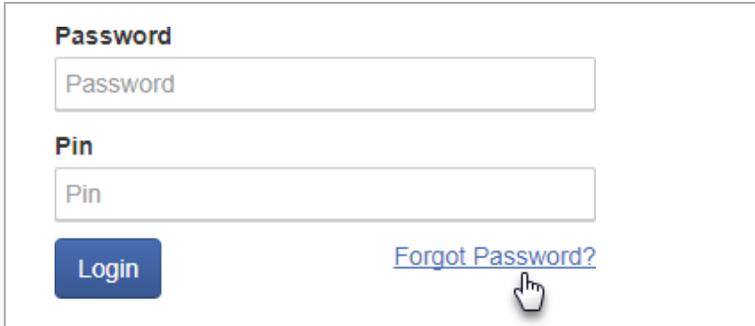


Figure 1-3: Login screen

Help Logging In

Forgot Password Link

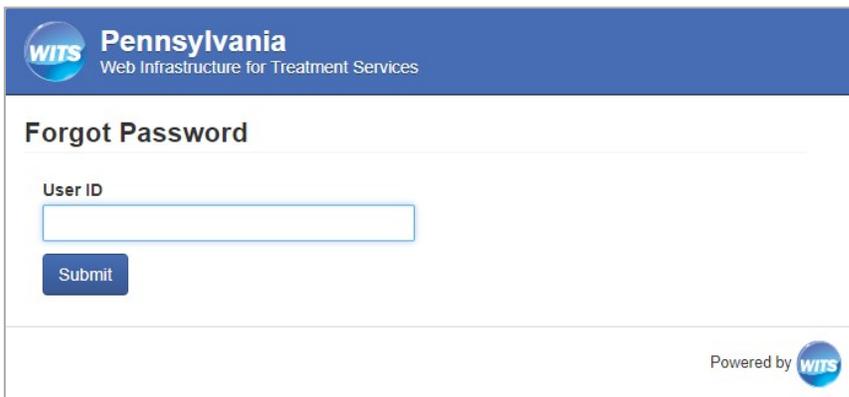
1. If you have forgotten your password, click **Forgot Password** located on the Login screen.



The screenshot shows a login form with two input fields: 'Password' and 'Pin'. Below the 'Pin' field is a blue 'Login' button and a blue link labeled 'Forgot Password?'. A mouse cursor is pointing at the 'Forgot Password?' link.

Figure 1-4: Login screen, Forgot Password link

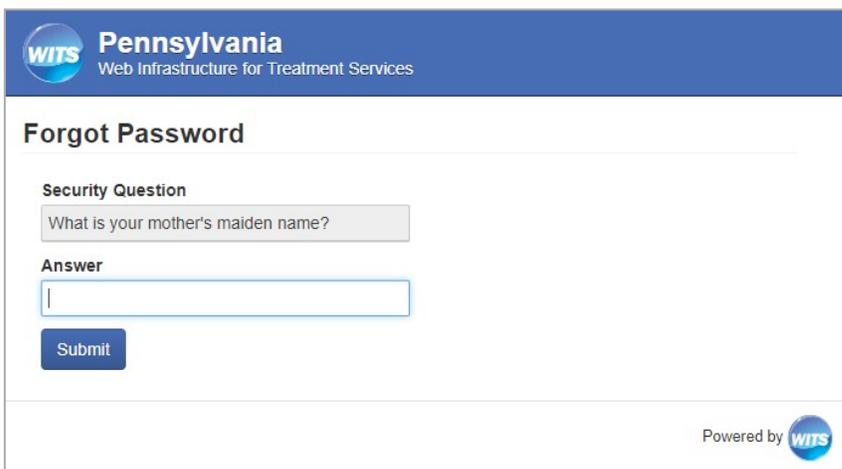
2. Type your **User ID** and then click the **Submit** button.



The screenshot shows the 'Forgot Password' screen. At the top is the WITS Pennsylvania logo and the text 'Web Infrastructure for Treatment Services'. Below the title 'Forgot Password' is a 'User ID' label and an input field. A blue 'Submit' button is located below the input field. At the bottom right, it says 'Powered by WITS'.

Figure 1-5: Forgot Password screen

3. Type the answer to your Security Question and then click the **Submit** button.



The screenshot shows the 'Forgot Password' screen. At the top is the WITS Pennsylvania logo and the text 'Web Infrastructure for Treatment Services'. Below the title 'Forgot Password' is a 'Security Question' label and a text box containing 'What is your mother's maiden name?'. Below that is an 'Answer' label and an empty input field. A blue 'Submit' button is located below the input field. At the bottom right, it says 'Powered by WITS'.

Figure 1-6: Forgot Password screen, Answer field

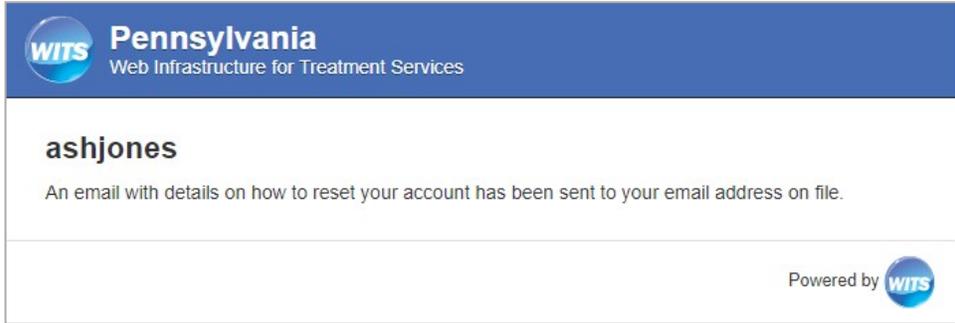


Figure 1-7: Forgot Password, Confirmation screen

- An email will be sent to your primary email address on file with a link to reset your credentials. Please note that this link will expire after 24 hours after the email was sent. Click the link provided in the email.

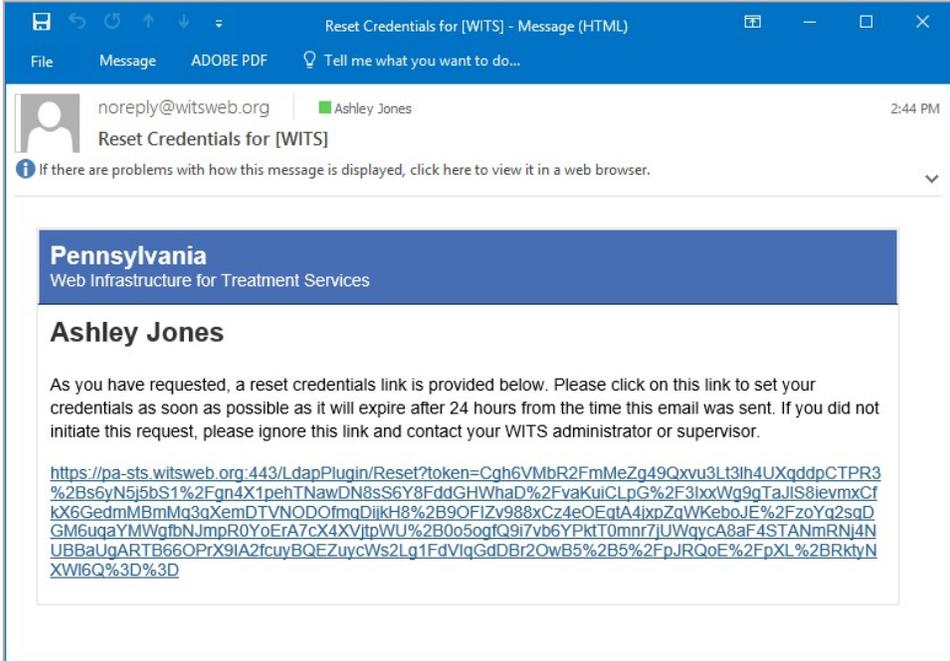


Figure 1-8: Reset Credentials Email

- On the Reset Credentials screen, type your new **Password** and **Pin**, and then click **Save**. Please note you do not have to re-answer your security question when resetting your credentials.

WITS Pennsylvania
Web Infrastructure for Treatment Services

Reset Credentials

Display Name
Jones, Ashley

Email
ashley.jones@pa.gov

Security
What is your favorite color?

Answer
Blue

Password
.....

Confirm Password
.....

Pin
.....

Confirm Pin
.....

Show Password/Pin

Powered by **WITS**

Figure 1-9: Reset Credentials screen

WITS Pennsylvania
Web Infrastructure for Treatment Services

Ashley Jones

Your Information has been successfully updated!
You can start using WITS.

Powered by **WITS**

Figure 1-10: Reset Credentials, Confirmation screen

How to Log Out

Remember to log out of WITS at the end of the day and anytime your computer is unattended.

1. On the top navigation bar, click **Logout**.



Figure 1-11: Logout button

2. Next, click **Yes** to log out.



Figure 1-12: Logout confirmation window

Security Features

- WITS will automatically lock an account if you are signed in to WITS on one computer and then you use a different computer to log in to WITS. To prevent this issue, always remember to log out at the end of the day and anytime your computer is unattended.
- Your Password and Pin must be changed every 60 days.
- You have a maximum of three incorrect login attempts.
- Your account will be disabled after 60 days if you do not log in.

Part 2: User Interface

Navigation

WITS is a sophisticated system designed to accommodate many different types of users and staff. In fact, WITS can be customized by any system administrator to create staff accounts with user-specific access and permissions. This translates into a personalized WITS interface whereby the end user will only have access to the modules, screens, and functions that have been assigned to them.

Because WITS uses a personalized user interface, end users will not be distracted by additional screens, modules, or functionality, which can reduce productivity and make an interface less user friendly. To obtain the maximum use out of the WITS system, the user should be aware of the following interface features and navigation, including the following:

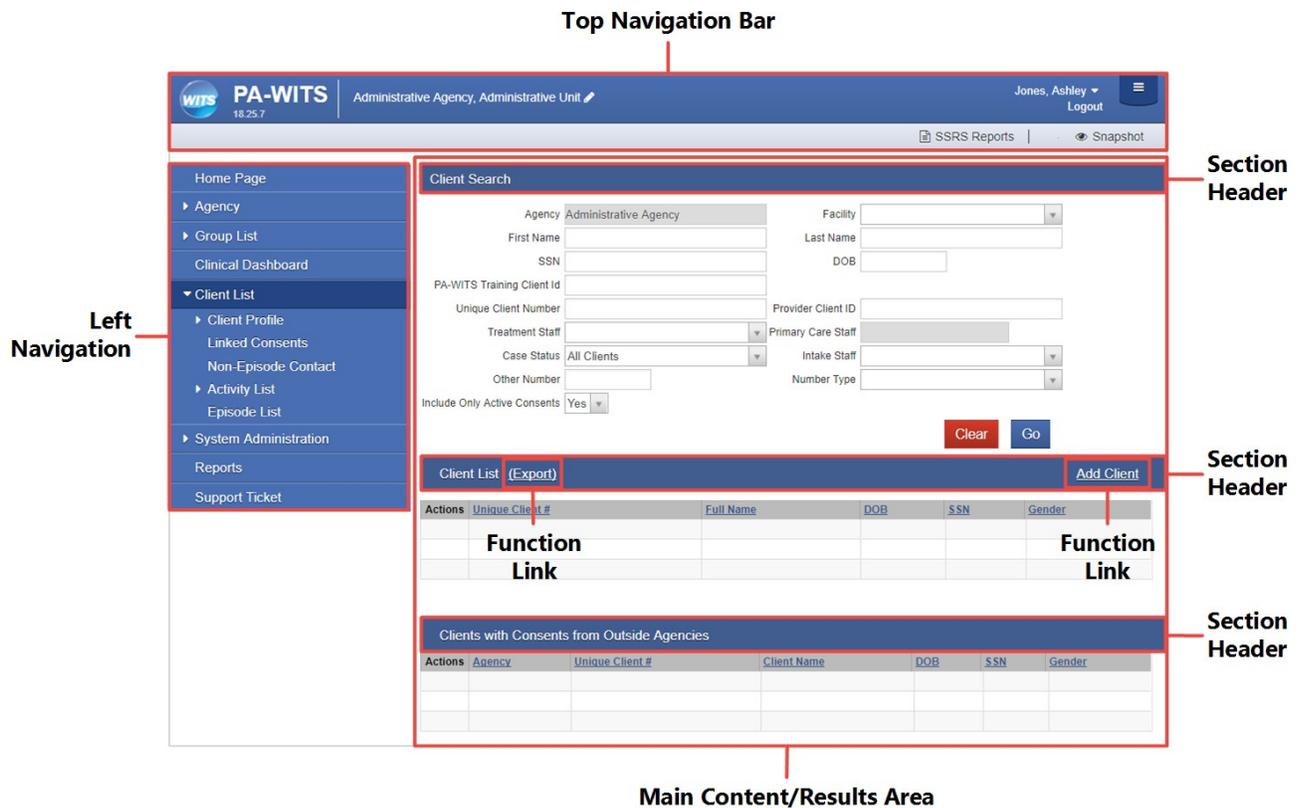


Figure 2-1: WITS User Interface Diagram

1. **Top Navigation Bar:** This area contains information that helps the user know his or her current context in the system, which includes:

- **User:** The Staff Member currently logged in to the system.
- **Location:** The Agency and Facility currently selected.

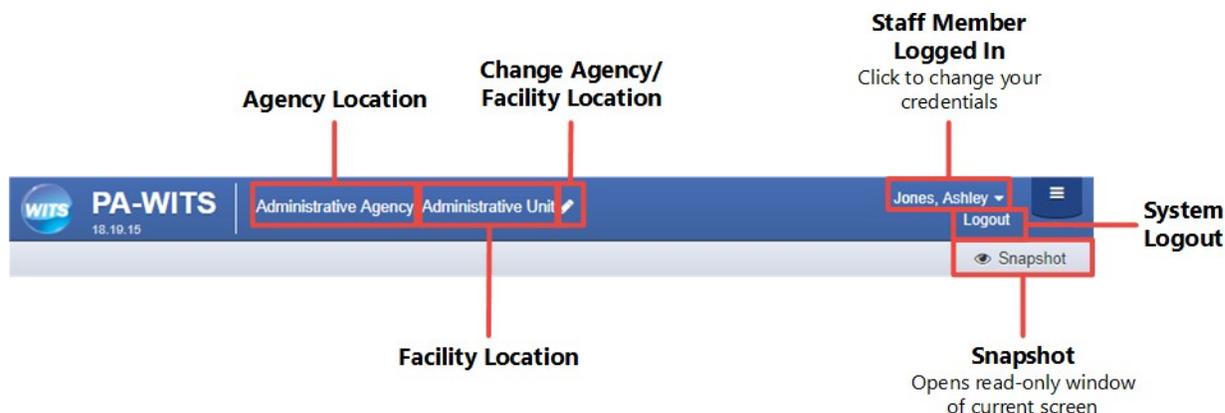


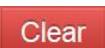
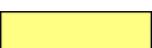
Figure 2-2: Top Navigation and Main Header Features

2. **Left Navigation:** WITS has been designed to follow common behavioral health service workflows. As a result, when using the left navigation (menu), you will immediately note that most of the modules and screens have been logically organized in a manner that makes sense to many Clinical Staff, Case Managers, and Administrators.
3. **Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. Typically, you will first see either of these sections:
- **Search:** To find information already entered, or
 - **Profile:** To enter new data
4. **Section Headers:** WITS often contains screens that are comprised of several sections. Typical headers indicate Search, List, and Profile (or entry) sections of screens. These section headers are always dark blue and may contain actions such as "Add" or "Export." If you are in the context of a client, a section header will also display the Client Name, WITS unique client number (UNC), and Case if you are within the activity list.



5. **Function Links:** If the screen allows you to perform certain functions, such as **Add** or **Export**, the functions appear as underlined links. A hand icon will also appear when your cursor floats over the action item, reminding you that you can click.

System Icons

Action Buttons		Data Fields	
	Cancels the current action and returns to the previous screen		Mandatory field: MUST have data in order to save record
	Saves data entered and remains on the current screen		Read-only: System-generated field, for display only and cannot be edited
	Saves data entered and returns to the section start page		Optional field: Will not affect completion or saving of record
	Navigate through the screens in each section (left and right arrow buttons)		Missing Required field: Enter data before Save or Finish
	Clears all criteria from the search tools when present		Required for State Reporting: Record may be saved but will not be complete
	Run the search tool using the criteria entered		
	Move data from one choice box to another (mover buttons)		

Action Links	
	Clicking on a column heading will reorganize the table alphanumerically from 1-Z and then Z-1
	Administrative Actions
	On list screens, hover over the Actions pencil icon to quickly select from associated screens

System Notifications

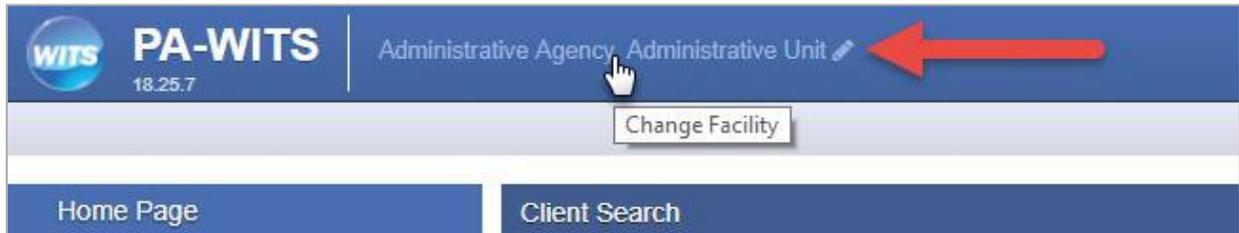
	<p>Error: The red notification message indicates an error on the screen. WITS will not allow the user to leave or save the page until the stated error is addressed.</p>
	<p>Informational Message: The blue notification message informs users that something has occurred.</p>
	<p>Warning: The yellow notification message warns the user that entered data falls outside of a certain parameter. The record can still be updated.</p>

NOTE: Error messages will display at the top of the page, unless the screen requires scrolling, in which case, the error message will display where the user is on the page.

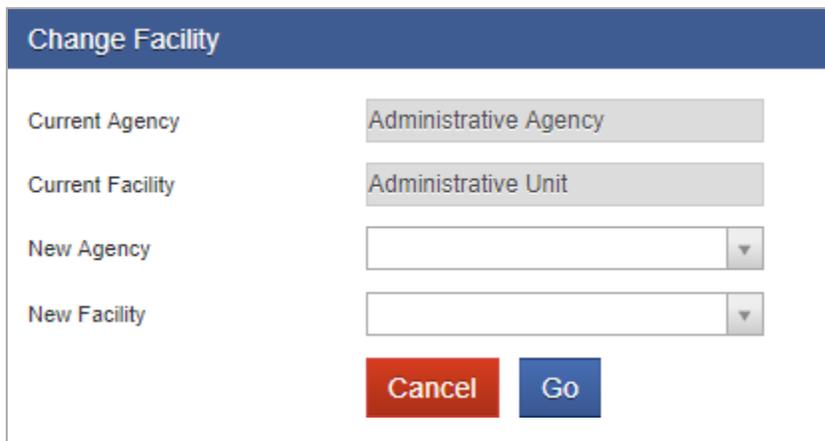
How to Change Facilities

Staff members with permission to access other agencies and/or facilities can navigate to those locations by using the **Change Facility** screen.

1. On the top navigation bar, point to your current location, and then click the name.



2. On the **Change Facility** screen, click the drop-down menus to select a new Agency and/or Facility.
3. Click **Go**.

A screenshot of the 'Change Facility' screen. The screen has a dark blue header with the title 'Change Facility'. Below the header are four rows of input fields: 'Current Agency' with a greyed-out field containing 'Administrative Agency'; 'Current Facility' with a greyed-out field containing 'Administrative Unit'; 'New Agency' with an empty white field and a downward arrow; and 'New Facility' with an empty white field and a downward arrow. At the bottom of the form are two buttons: a red 'Cancel' button and a blue 'Go' button.

Types of Screens

Home Page

The Home Page displays general information including Announcements, Alerts, the Scheduler, and Informational Messages. This is the first screen you will see after logging in. You can also access this screen from the left menu by clicking the Home Page button, which is located at the top left of the navigation menu.

The screenshot displays the PA-WITS Home Page. At the top, the header includes the WITS logo, the text 'PA-WITS 18.25.7', the user's role 'Administrative Agency, Administrative Unit', and the user's name 'Jones, Sarah A., CCS' with a 'Logout' button. A 'Snapshot' button is also visible. The left sidebar lists navigation options: Home Page, Agency, Group List, Clinical Dashboard, Client List, and System Administration. The main content area features a notification banner: 'There is currently 1 person that has been referred in.' Below this, the 'Home' section contains an 'Announcements' table with one entry: 'Welcome to PA WITS! This version of the PA WITS system is dedicated to the collection of TEDS data since September 2015. Policy bulletin, QSCA, and training resources can be found by clicking the PA WITS tab at www.ddsp.pa.gov'. The 'Alert List' section shows a table with one alert: 'Staff Recertification Due' for 'Jones, Sarah A., CCS' with a due date of '7/12/2017'. The 'Schedule for: 7/3/2017' section includes a table with two scheduled events for 7/12/2017: 'Client: Kabitan, Hosta (Age: 17) Procedure: 9100 Client Intake' and 'Client: Vera, Aloe (Age: 19) Procedure: 9100 Client Assessment', both with a status of 'Scheduled'.

Figure 2-3: Home Page

Search Screen

Search screens allow you to search for items that have already been entered into the system. Search results are then displayed in the List screen. The more information entered in the search fields, the more restrictive the search. Search screens are identified with the Go and Clear buttons.

- **Go** initiates the search.
- **Clear** will remove all search criteria in the search fields.

TIP • Search screens will always have these buttons:

A screenshot of the 'Client Search' form. The form has a dark blue header with the text 'Client Search'. Below the header, there are several search fields arranged in two columns. The left column includes: Agency (dropdown menu with 'Community Counseling Center of Merc' selected), First Name (text input), SSN (text input), PA-WITS Training Client Id (text input), Unique Client Number (text input), Treatment Staff (dropdown menu), Case Status (dropdown menu with 'All Clients' selected), Other Number (text input), and Include Only Active Consents (checkbox with 'Yes' selected). The right column includes: Facility (dropdown menu), Last Name (text input), DOB (text input), Provider Client ID (text input), Primary Care Staff (text input), Intake Staff (dropdown menu), and Number Type (dropdown menu). At the bottom right of the form, there are two buttons: a red 'Clear' button and a blue 'Go' button.

Figure 2-4: Client Search Screen

List Screen

A search will result in a populated list, with columns showing various data elements. All lists are sortable by clicking on the column header.

- Many lists have an **Actions** column offering functions that can be applied to a selection from the list.
- Many lists have an **Export** feature, allowing you to export data on the list into an Excel spreadsheet. Exports are great alternatives to reports.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	T23001017833000	Test, Bob	1/1/1978	111-22-3300	Male
	S63007117455550	Shirt, Pink	7/11/1974	223-44-5555	Female
	230006085213690	Sad, Happy	6/8/1952	258-74-1369	Male
	R13012126200120	Rabbit, Jessica	12/12/1962	589-54-0012	Female
	M20007030036580	Mouse, Minnie	7/3/2000	908-88-3658	Female
	M20005068789750	mouse, mickey	5/6/1987	124-54-8975	Male

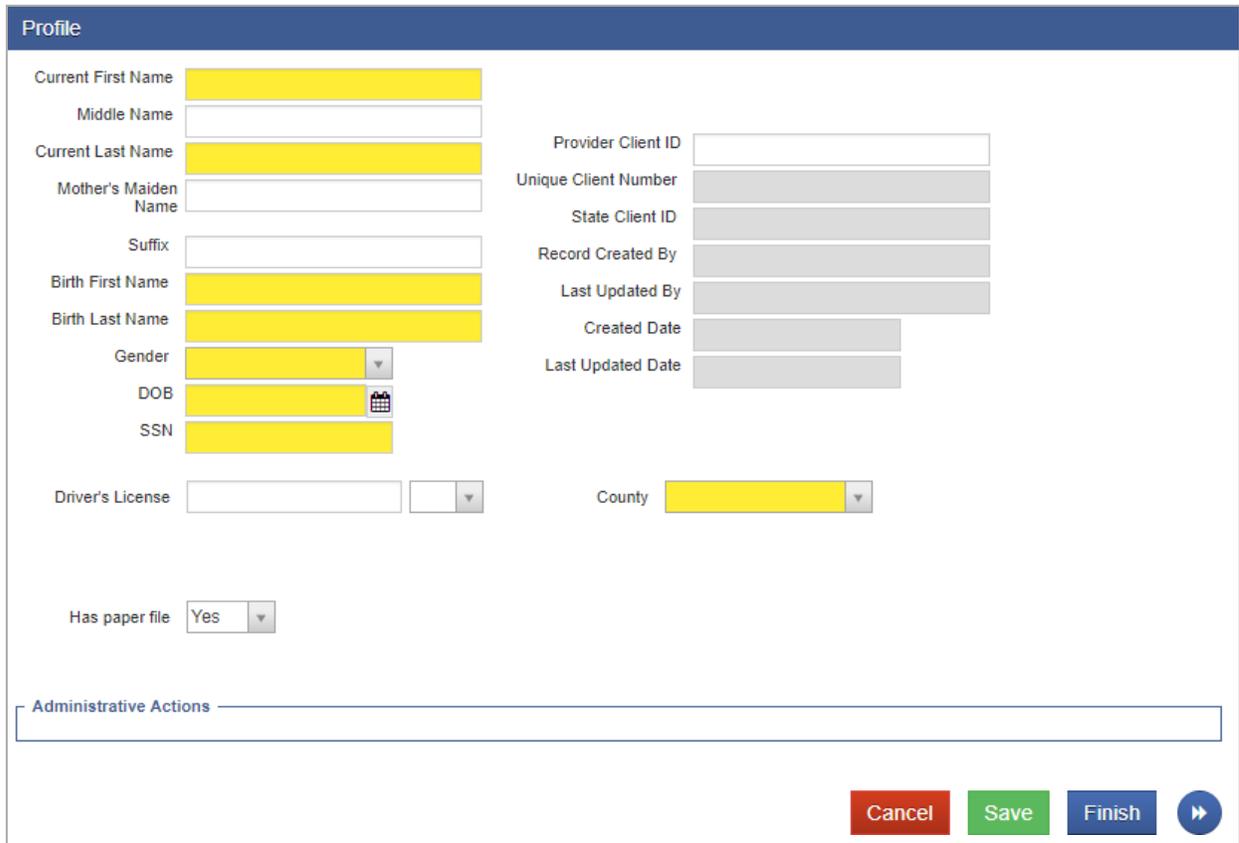
Figure 2-5: List Screen

Profile Screen

The Profile Screen displays the main content area for data entry. Profile Screens include Save, Cancel, and Finish buttons.

- **Cancel:** returns to the prior screen or list without saving.
- **Save:** reviews any business rules associated with the screen before saving the data, and will keep the user on the current screen.
- **Finish:** saves the data and returns to the previous list screen.

TIP • Profile screens will always have these buttons:



The Profile Screen is a data entry form with a blue header bar labeled "Profile". It contains several input fields and dropdown menus. The fields are organized into two columns. The left column includes: Current First Name, Middle Name, Current Last Name, Mother's Maiden Name, Suffix, Birth First Name, Birth Last Name, Gender (dropdown), DOB (calendar icon), SSN, Driver's License (text and dropdown), and Has paper file (Yes dropdown). The right column includes: Provider Client ID, Unique Client Number, State Client ID, Record Created By, Last Updated By, Created Date, and Last Updated Date. At the bottom, there is a "County" dropdown and a "Has paper file" dropdown. Below the main form area is a section titled "Administrative Actions" with a long horizontal line. At the bottom right, there are four buttons: "Cancel" (red), "Save" (green), "Finish" (blue), and a blue circular button with a right-pointing arrow.

Figure 2-6: Profile Screen

Part 3: Data Entry Tips

Field Types

WITS uses colors on certain fields to indicate whether they are required or read-only:



A dark yellow field is required and must be filled in before saving. If the field is empty, an error message will appear.



A light yellow field is required by business rules. The record can be saved without entering the field, but this information will need to be filled-in later.



A white field is not required, and the entry is optional.



A gray field is filled by the system and is read-only. It cannot be edited. It may display information entered in another screen.



Keyboard Shortcut: Press Tab to move between fields.

Textbox

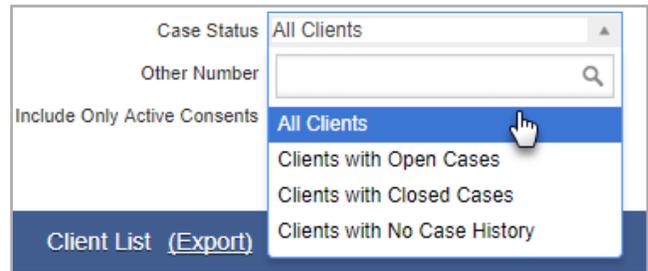
Textboxes allow the user to enter data manually. Some text boxes have specific formats that need to be entered, such as the following:

- **Date fields:** require M/D/YY or M-D-YY format (Years can be entered as a 2- or 4-digit year, but it will be converted to a 4-digit year when saved).
- **SSN and Phone Number fields:** require numbers; dashes are optional and are added automatically when saved.
- **Larger text boxes:** will expand if you pull the lower right corner with your mouse:



Drop-down Menu

A Drop-down Menu is used when only one entry may be selected from a list of values. Typically, these values are controlled by your administrator.



Mover Box

A mover box is used when more than one entry may be selected from a list of values. To choose multiple values from the list, hold down the control key, click the values from the left side, and then click the > button to move the values to the right. To remove values from the selected list, click the value(s) on the right that you want to remove and then click the < button to move them to the left.

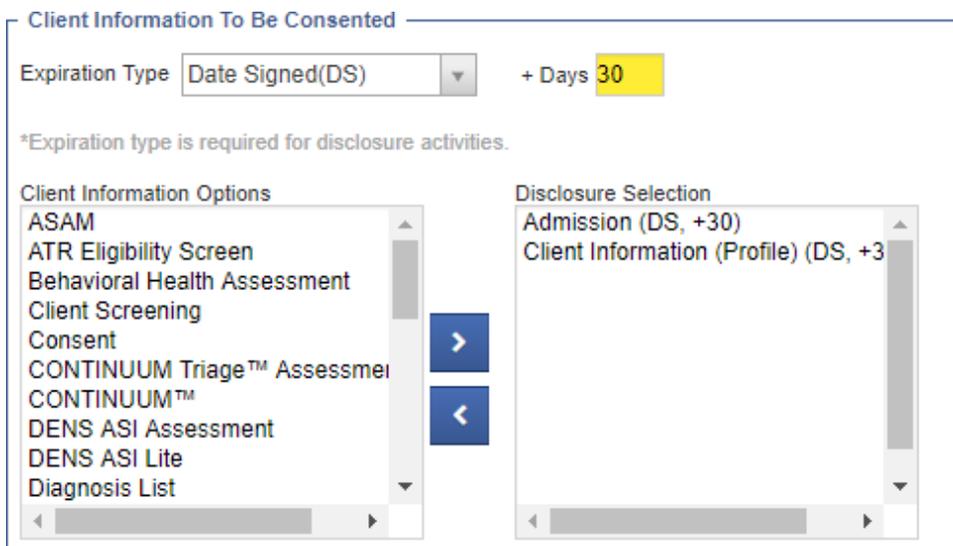


Keyboard Shortcut: Hold Ctrl+A to select all options



Mover Box with a Condition

In some cases, you may be asked to provide a condition (such as a date) to go along with the value you choose. Make sure to enter the appropriate condition for each selected value.



Client Search Tips

Client Name or Number

Use a client's nickname or alternate names in the **First Name** or **Last Name** fields.

Use an **asterisk (*)** to perform a wildcard search.

Examples:

- Find clients whose last name starts with "Jon": Jon*

- A screenshot of the 'Client Search' form. The form has a dark blue header with 'Client Search' in white. Below the header, there are several input fields: 'Agency' (a dropdown menu with 'Administrative' selected), 'Facility' (a dropdown menu), 'First Name' (a text box), 'Last Name' (a text box), 'SSN' (a text box containing '*1123'), and 'DOB' (a text box). A red arrow points to the 'SSN' field.

Search by the last 4 digits of a client's SSN: *1123

Client Birthday or Age

Search within a timeframe by separating the two dates with a **colon (:)**. Search for clients born after a certain date with a **greater than sign (>)**. Search for clients born before a certain date with a **less than sign (<)**.

Examples:

- Find clients born in the year 1990: 1/1/1990:12/31/1990

- A screenshot of the 'Client Search' form. The form has a dark blue header with 'Client Search' in white. Below the header, there are several input fields: 'Agency' (a dropdown menu with 'Administrative' selected), 'Facility' (a dropdown menu), 'First Name' (a text box), 'Last Name' (a text box), 'SSN' (a text box), and 'DOB' (a text box containing '>12/30/1959'). A red arrow points to the 'DOB' field.

Find clients born after a certain date: >12/30/1959

Part 4: Hints

Snapshot

The Snapshot feature opens a separate window containing a read-only copy of your current screen. This useful tool allows you to access other screens in WITS while still viewing the information within the Snapshot. You can open multiple Snapshots windows simultaneously.



Figure 4-1: Snapshot button

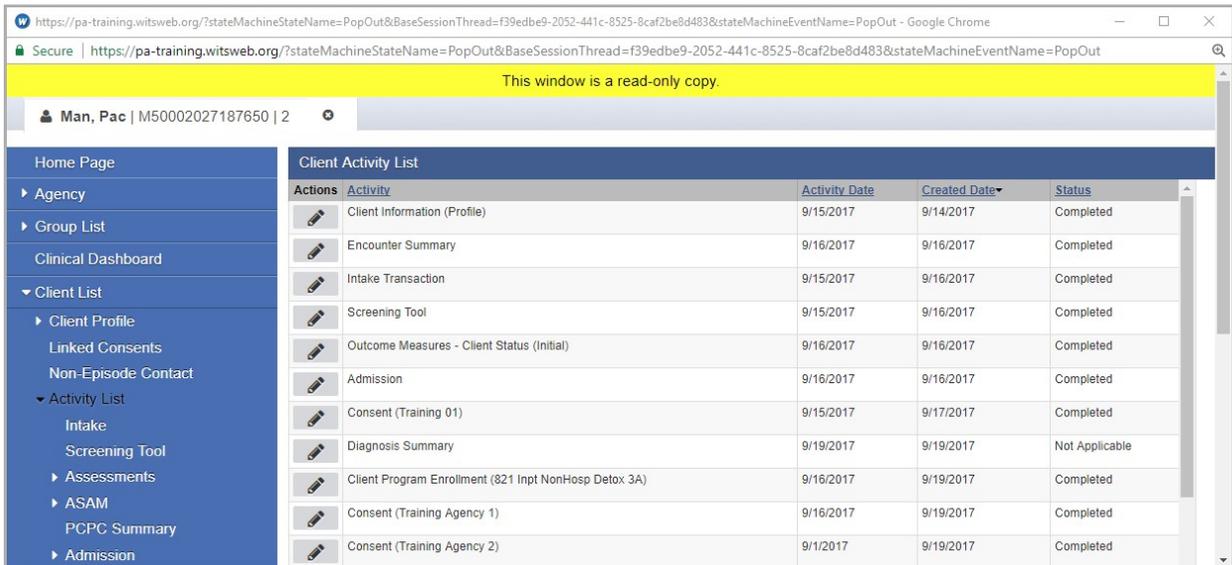


Figure 4-2: Snapshot, read-only window

Print Function

Use your browser's print function to print your screen. Using your mouse, **right-click** on your screen to open a list of options, and then click **Print**.

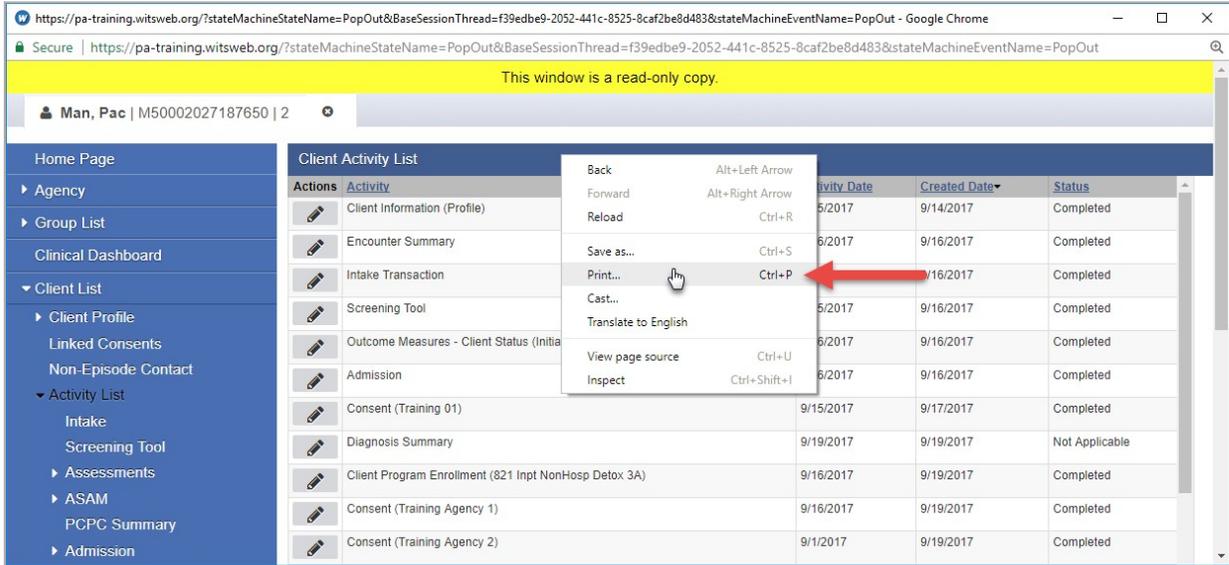


Figure 4-3: Right-click to open Internet browsers Print function

In the print preview, notice that the system saves ink by only printing the main section of the screen.

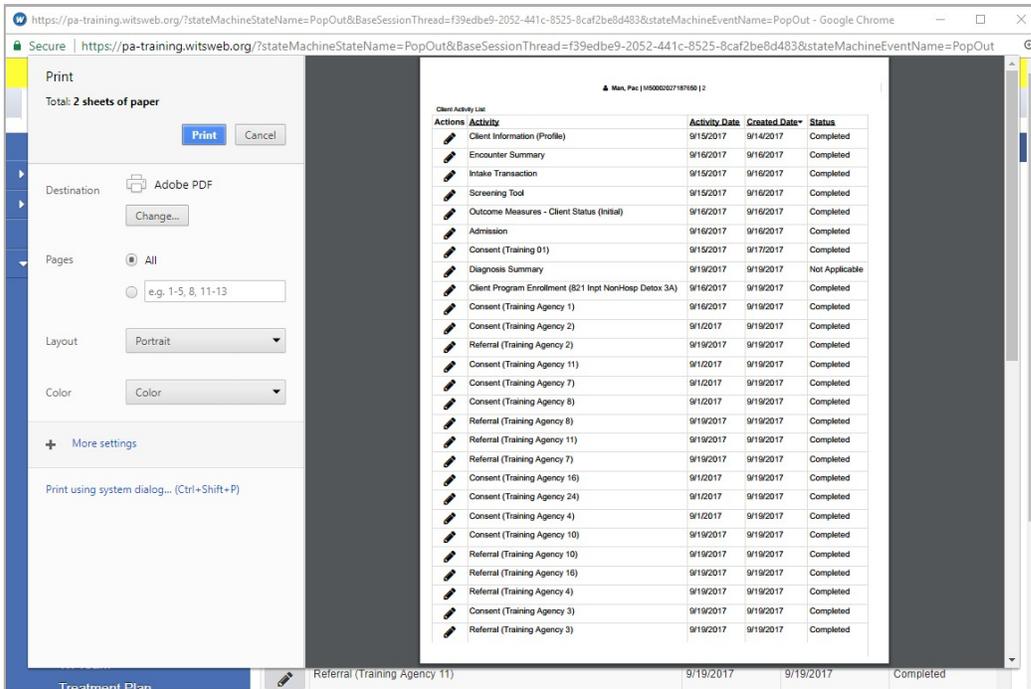


Figure 4-4: Print Preview