



**pennsylvania**  
DEPARTMENT OF DRUG AND  
ALCOHOL PROGRAMS



# PA WITS

*Agency Administrator*

Applies to:

WITS Version 18.0+

**Pennsylvania DDAP**

Last Updated  
June 1, 2018

# Pennsylvania DDAP

## PA WITS

### Preface

FEi's solution, Web Infrastructure for Technology Services (WITS), will be used by the State to meet their primary objective of reporting Treatment Episode Data Set (TEDS) to Substance Abuse and Mental Health Services Administration (SAMHSA). In addition to meeting the reporting requirements, WITS will be used as an integrated system that will collect clinical and case management data as required by the DDAP Treatment Manual.

The WITS Agency Administrator User Guide outlines the processes involved for managing Agencies and Facilities, and creating Agency Announcement and Alerts.

### Intended Audience

This user guide has been prepared for PA WITS Agency administrative staff members.

### System Requirements

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

### Internet Browsers

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

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

### Pop-up Blocker

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

### Customer URL Links

**Training Site:** <https://pa-training.witsweb.org>

The training site allows staff members to practice using the system before entering actual data in the production site. *Please do not enter real client information into the training site.*

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

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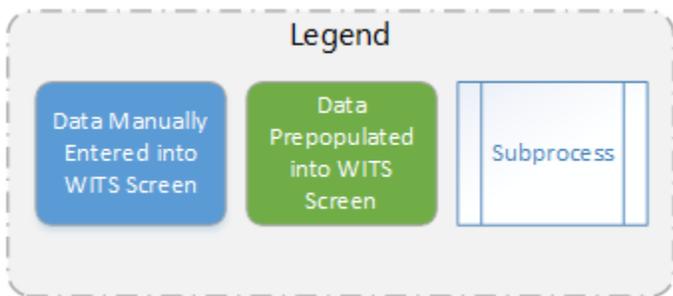
# Part 1: Types of Agency Workflows

## Work Flow Diagrams

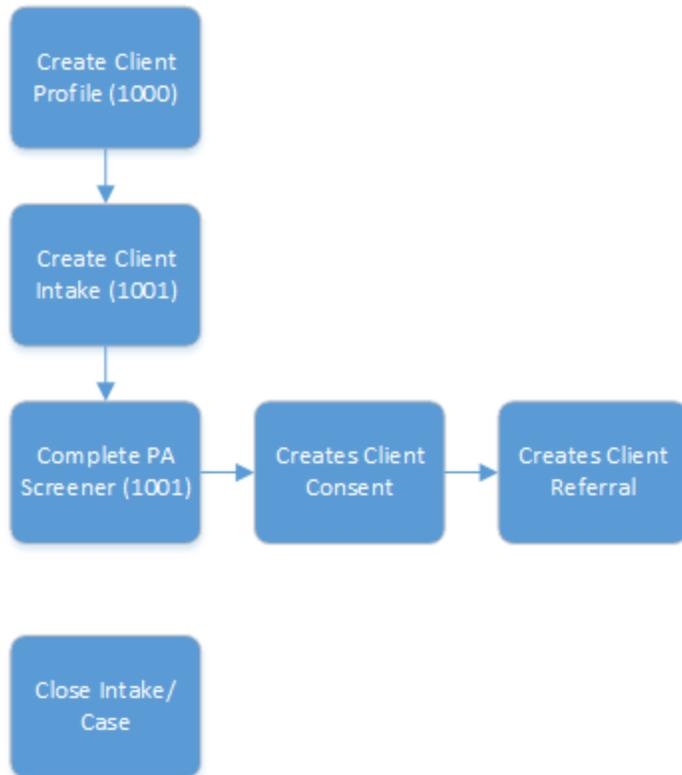
The purpose of this training guide is to ensure the Agency Administrator feels confident in the role and responsibilities to serve as the Tier 1 support and can complete any set up for the Agency and Facility profile in the PA WITS system. Once the setup of the Agency profile is complete, the most important ongoing job of the Agency Administrator is creation and management of staff.

Before an Agency Administrator can understand what type of staff to set up and how to give staff access to the system, they must understand how the data their agency will enter into PA WITS fits into the overall PA WITS workflow. This guide identified 5 different types of Agencies to illustrate the workflow activities by agency. Before an Agency Administrator is trained, they should be able to identify what workflow activities happen within their own agency.

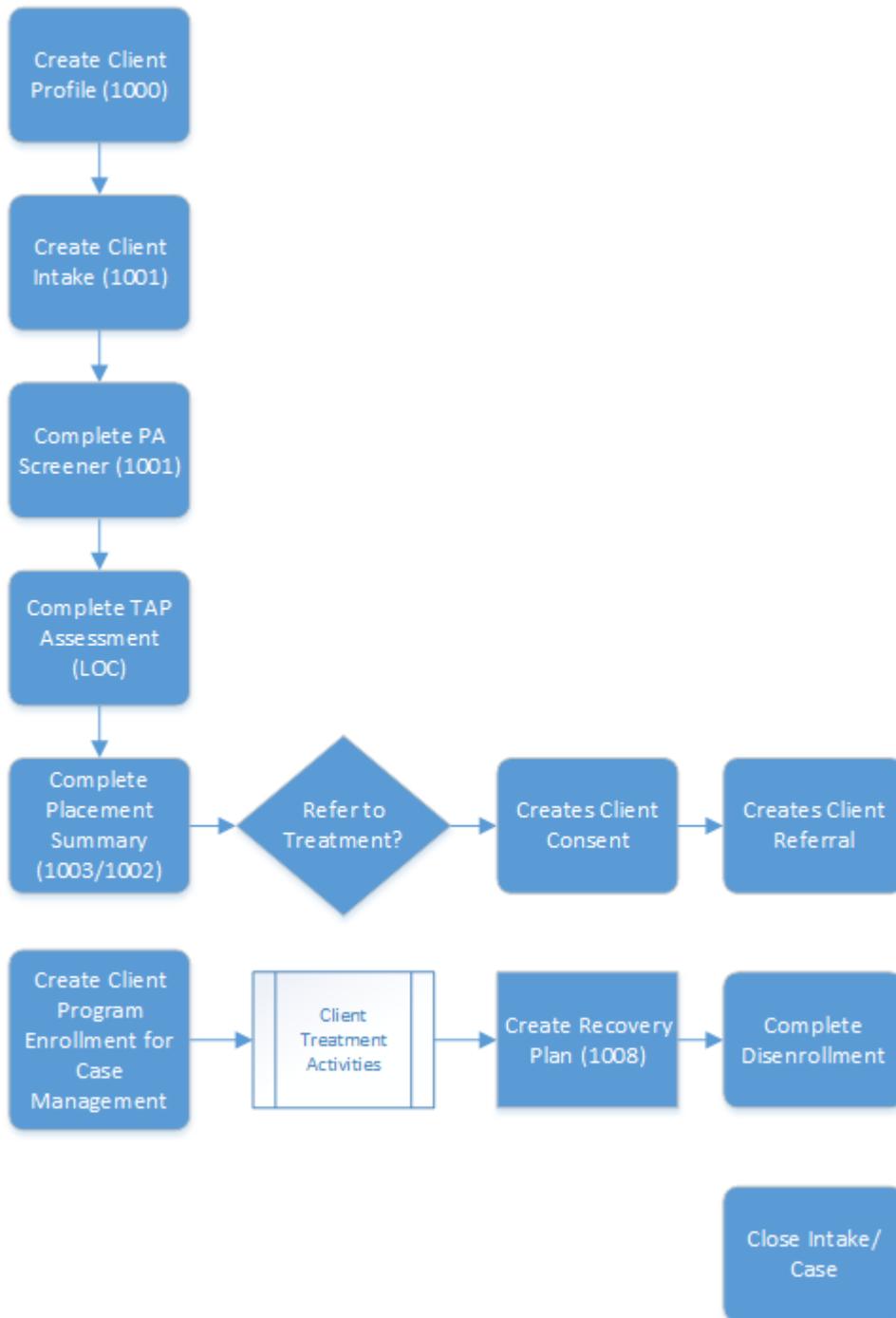
**Note:** It is also important to understand the workflow activities that happen outside your own agency, especially when consenting and referring clients to other Agencies with in PA WITS. PA WITS has been designed to capture specific pieces of information on an individual client level as they move from one agency for the purposes of reporting.



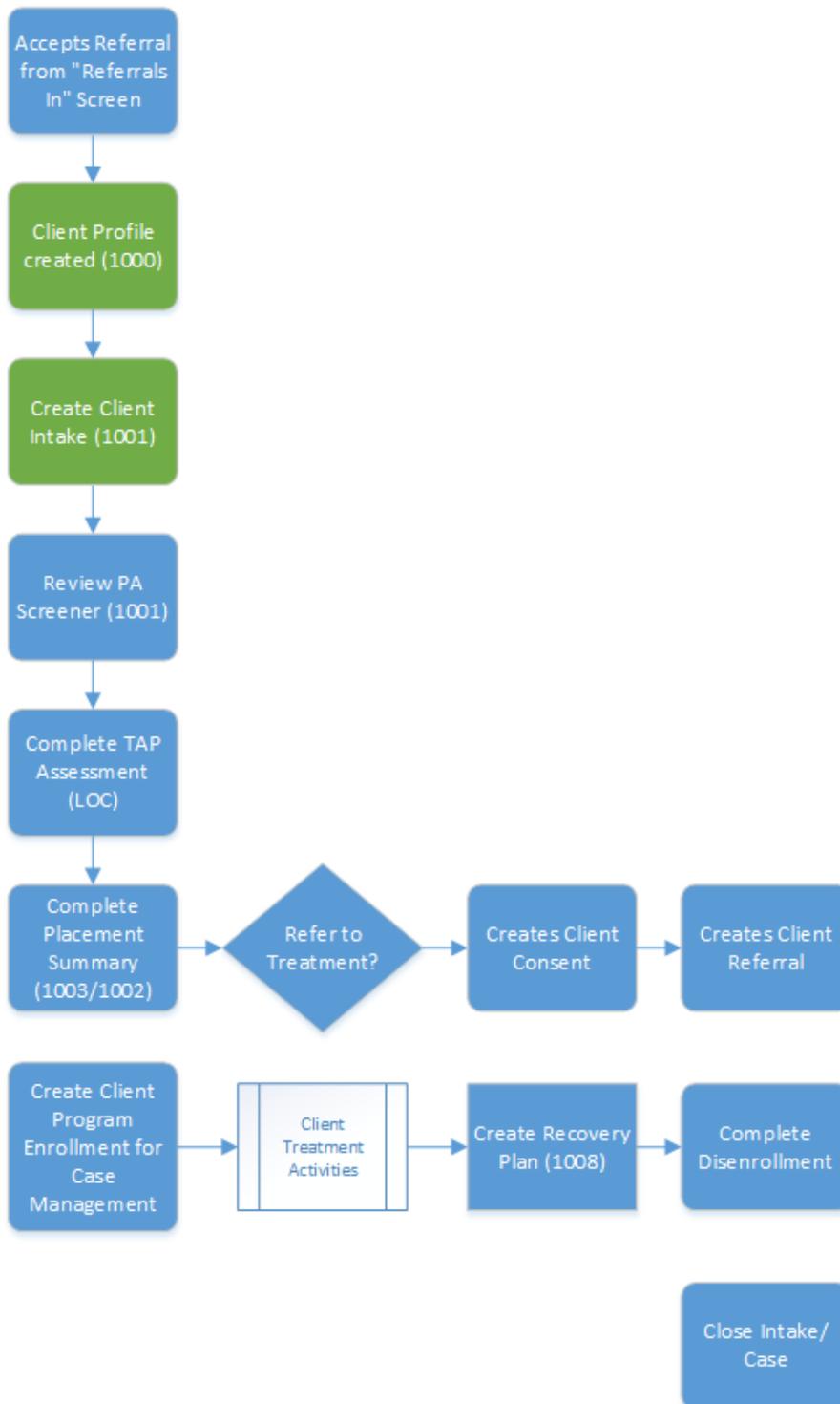
## 1. Screening Only Agency



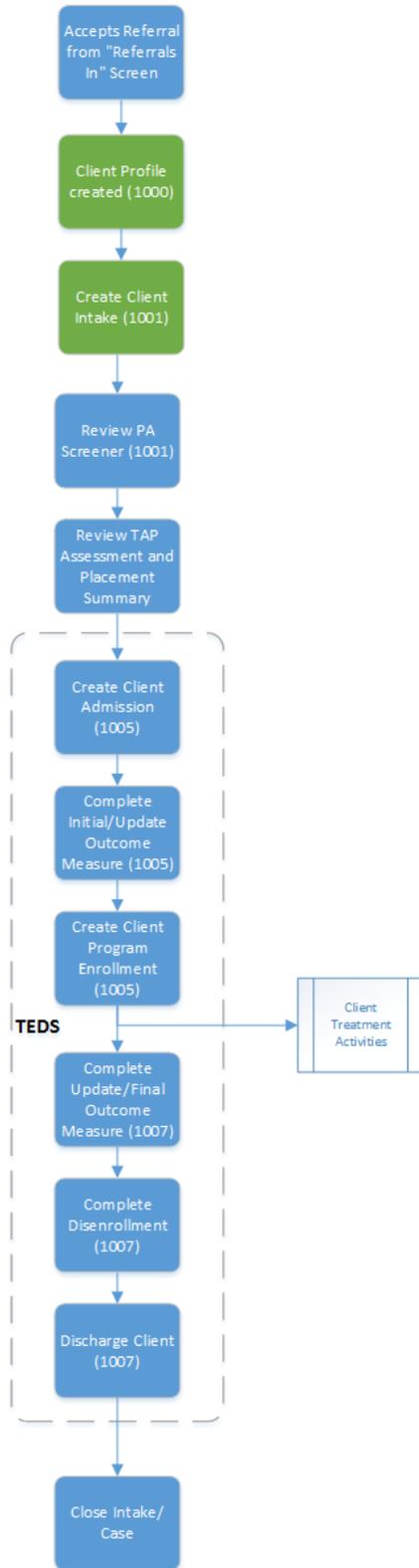
## 2. Screening Agency with Case Management



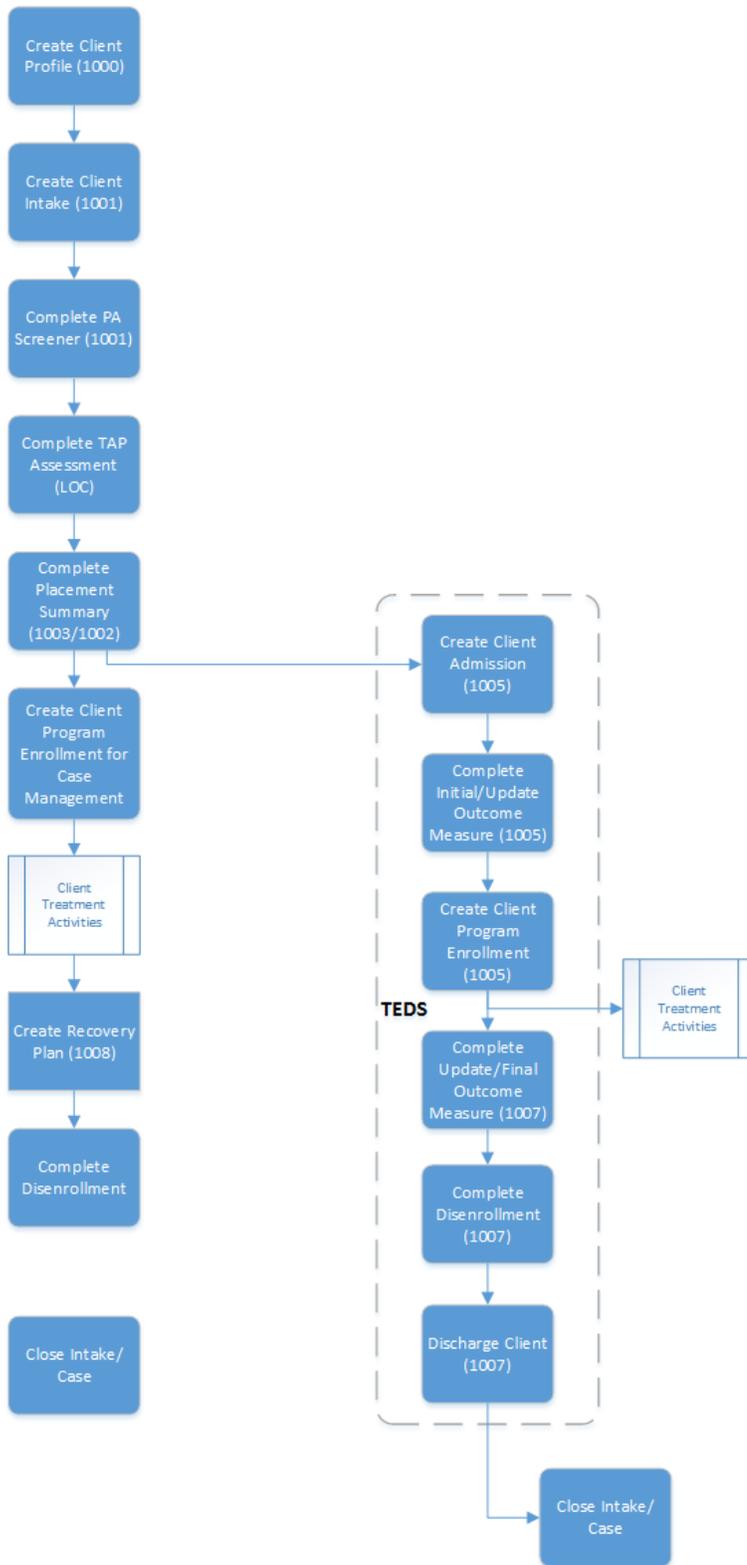
### 3. Case Management Only Agency



#### 4. Treatment Only Agency



## 5. Full Functional Agency



# Part 1: Agency Administration

## Role needed:

- Agency Administrator

## Agency Profile



**Where:** *Agency > Agency List > Agency Profile*

Agencies are created by WITS Administrators at DDAP who then assigns Agency Administrators to help complete additional agency setup. When creating an agency, only the Agency Profile and Address are required; other agency information can be set up by Agency Administrators.

1. On the left menu, click **Agency**, and then click **Agency Profile**.
2. On the **Agency Profile** screen, the following information in the table below has been entered by DDAP and should not be changed.

Table 1-1. Agency Profile Fields

Field Name	Description
<b>Agency Name</b>	The agency's name.
<b>Display Name</b>	The agency's display name will appear in drop-down menus throughout the system and should be meaningful to all staff members; this field will automatically copy the first 15 characters from the "Agency Name" field but this information can be edited; there is a 15 character limit for this field.
<b>Agency Type</b>	Select from the drop-down menu.
<b>Contract Role</b>	Select either "Provider" or "Contractor".
<b>County</b>	Select from the drop-down menu;
<b>Agency Faith Based</b>	This field defaults to "No".
<b>Domains</b>	Select the appropriate domain(s).

**NOTE** • Typically, the State agency should have the **Contractor** Contract Role selected, and all other agencies should have the **Provider** role.

Figure 1-1: Agency Profile screen

3. To move to the next screen, click the **right arrow button**.

4. If additional addresses are needed, click **Add Address**.

**Note:** DDAP has already entered the address of the agency. This should not be changed.

Actions	Address Type	Address	Phone	Updated

Figure 1-2: Address/Phone List screen

5. On the **Address Information** screen, enter the required information.

Table 1-2: Address Information Fields

Field	Description
<b>Address Type</b>	Select from the drop-down menu.
<b>Confidential</b>	This field defaults to "No"; update if applicable.
<b>Address Line 1</b>	Type the first address line.
<b>Address Line 2</b>	Type the second address line, if applicable.
<b>City</b>	Type the city name.
<b>State</b>	Select state from the drop-down menu.
<b>Zip</b>	Type the zip code.

Figure 1-3: Address Information screen

6. If available, add a telephone number by clicking **Add Phone**. Select the phone number Type, enter the phone number, and then click **Finish**.

Figure 1-4: Add Phone Number

- The new address will appear on the Address Information screen. Add additional phone numbers if needed. On the Address Information screen, click **Finish**.

Actions	Type	Number
	office	(555) 223-1234

Figure 1-5: Address Information screen

- On the Addresses screen, click **Finish**.

Actions	Address Type	Address	Phone	Updated
	Agency Admin. Office	123 Front Street Harrisburg, PA 17110	office (555) 223-1234	4/7/2017

Figure 1-6: Address/Phone screen

# Agency Contacts



**Where:** Agency > Agency List > Contacts

The **Contacts** section is used to record a list of agency contacts according to their functions and roles within the agency.

**Note:** Staff Members must be set up in the agency before Contacts can be added to the Facility.

1. On the left menu, click **Agency**, and then click **Contacts**.
2. Click Add Contact.

Figure 1-7: Contacts for Agency screen

3. Complete the required fields.

Table 1-3: Agency Contact fields

Field	Description
<b>Staff</b>	Select a staff member from the drop-down menu.
<b>Contact Type</b>	Select an option from the drop-down menu.
<b>Effective Date</b>	Enter an effective date.
<b>Status</b>	Select the status from the drop-down menu.

Figure 1-8: Add Agency Contact screen

4. Click **Save**. Add additional contacts if needed. Click **Finish**.

# Agency Disclosure



**Where:** Agency > Agency List > Relationships > Disclosure

PA WITS allows client information to be consented or “shared electronically” within the system. The way in which this is accomplished is by creating a consent record at the individual client level. This means each time a staff wants to share information that a consent record is created. It can be a very repetitive process to continue to create consent records on a client by client basis.

To help users create consistent consent records, each Agency should set up its own Agency Disclosure. This establishes a template for consents. A global disclosure policy can be created for all agencies, or a separate disclosure agreement can be created for each agency. See Consents section of the End User guide for more information about PA WITS and 42CFR Part 2 compliance.

1. On the left menu, click **Agency**, then click **Relationships**, and then click **Disclosure**.
2. Click Add Agency Disclosure Domain Record.

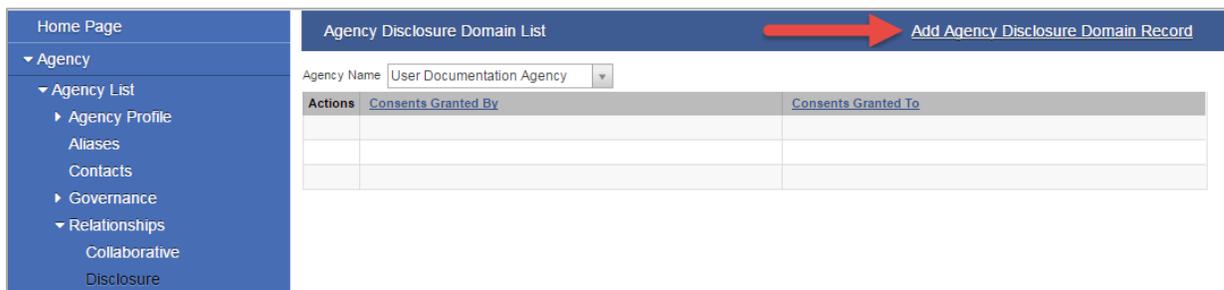


Figure 1-9: Agency Disclosure Domain List screen

3. In the **Agency Disclosure Domain** section, enter the following:

Table 1-4: Agency Disclosure Domain fields

Field	Description
<b>Disclosing Agency</b>	Select the name of your agency from the drop-down menu.
<b>Receiving Agency</b>	Select “Global Policy or Non System”, or select an individual agency name. The “Global Policy” will apply this consent template to any agency in WITS. If an individual agency is selected, the consent template will apply only to that agency.
<b>Receiving Entity (Non System Agency)</b>	If this disclosure agreement applies to an agency outside of WITS, type that agency’s name in this field.
<b>Global Policy? (Available To All Agencies)</b>	Select Yes or No.
<b>Always Verify Consent</b>	Select Yes or No. This serves as a visual reminder to the person creating the consent.

4. In the **Disclosure Domain Selection** section, enter the following:

Field	Description
<b>Expiration Type</b> and <b>+ Days</b>	Select either "Discharge (UD)" or "Date Signed (DS)", then when the yellow field appears, enter the number of days the consent will expire.
<b>Consent Options</b>	Click on the desired options, and then move the selections to the Selected Options box using the mover buttons. When staff members create client-specific consent records, these options will automatically populate.

5. When complete, click **Finish** to complete and save the disclosure record.

**Agency Disclosure Domain**

Disclosing Agency Administrative Agency ▼

Receiving Agency Global Policy or Non Syst... ▼

Receiving Entity(Non System Agency)

Global Policy? (Available To All Agencies) Yes ▼

Always Verify Consent? Yes ▼

**Disclosure Domain Selection**

**Client Information To Be Consented**

Expiration Type Discharge(UD) ▼      + Days

\*Expiration type is required for disclosure activities.

**Consent Options**

- Behavioral Health Assessment
- CAGE-AID Screening
- CONTINUUM Triage™ Assessment
- CONTINUUM™
- DENS ASI Assessment
- DENS ASI Lite

➤

➤

**Selected Options**

- Admission (UD, +30)
- ASAM (UD, +30)
- Client Information (Profile) (UD, +30)
- Client Screening (UD, +30)
- Consent (UD, +30)
- Intake Transaction (UD, +30)

**Comments**

Cancel
Save
Finish

Figure 1-10: Disclosure screen

# Agency Governance



**Where:** Agency > Agency List > Governance

The **Governance** section is used to record information on agency board members.

1. On the left menu, click **Agency**, click **Agency List**, and then click **Governance**.
2. Click Add New Governance Record.



Figure 1-11: Add New Governance Record

3. Complete the required fields.

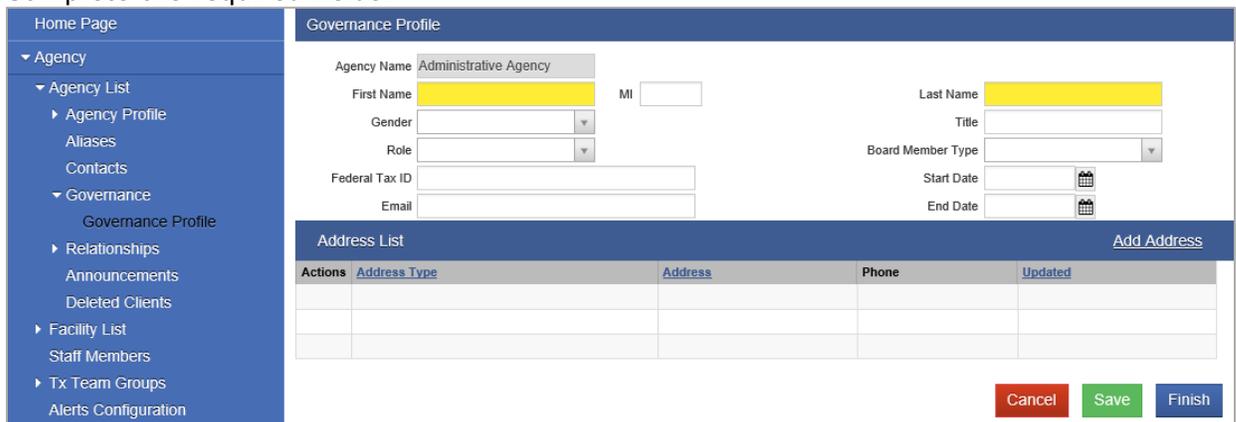


Figure 1-12: Governance Profile

4. Click **Save** and then click **Finish**.

# Referrals

## Referrals In



**Where:** Agency > Agency List > Referrals > Referrals In

### Role Needed:

- Referrals (Full Access)

**Note:** Only users with the referral role will see Referral Menu node.

Whenever clients are referred to your Agency from another agency, a message will appear on the Home Page as shown in Figure 1-13. Clients who have been “Referred In” have signed a consent form agreeing to share certain information with your agency. To review these referrals, follow the steps below.



Figure 1-13: Home Page with "referred in" notification

1. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals In**.
2. On the **Referrals In Search** screen, in the **Referral Status Codes** field, select “**Referral Created/Pending**” and move this option to the **Search Criteria** box by clicking the mover button as shown in Figure 1-14.
3. After selecting the search criteria, click **Go** to view the search results list.

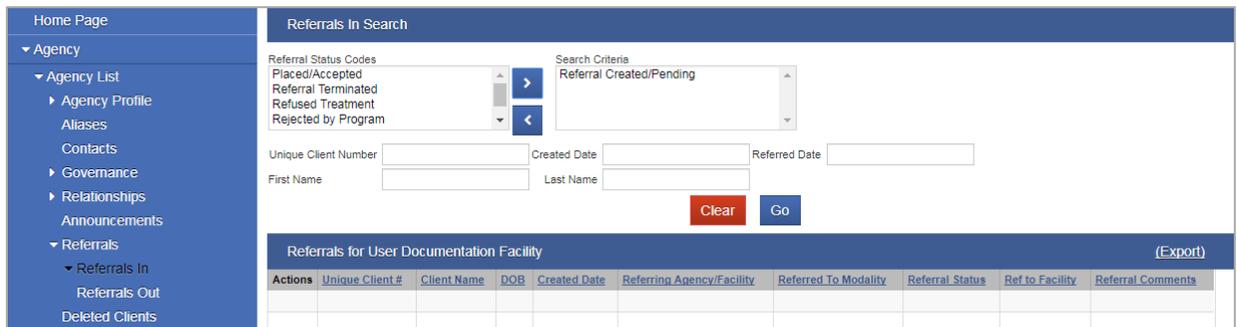


Figure 1-14: Referrals In Search screen

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

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

Figure 1-15: Referrals Search Results, Review link

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

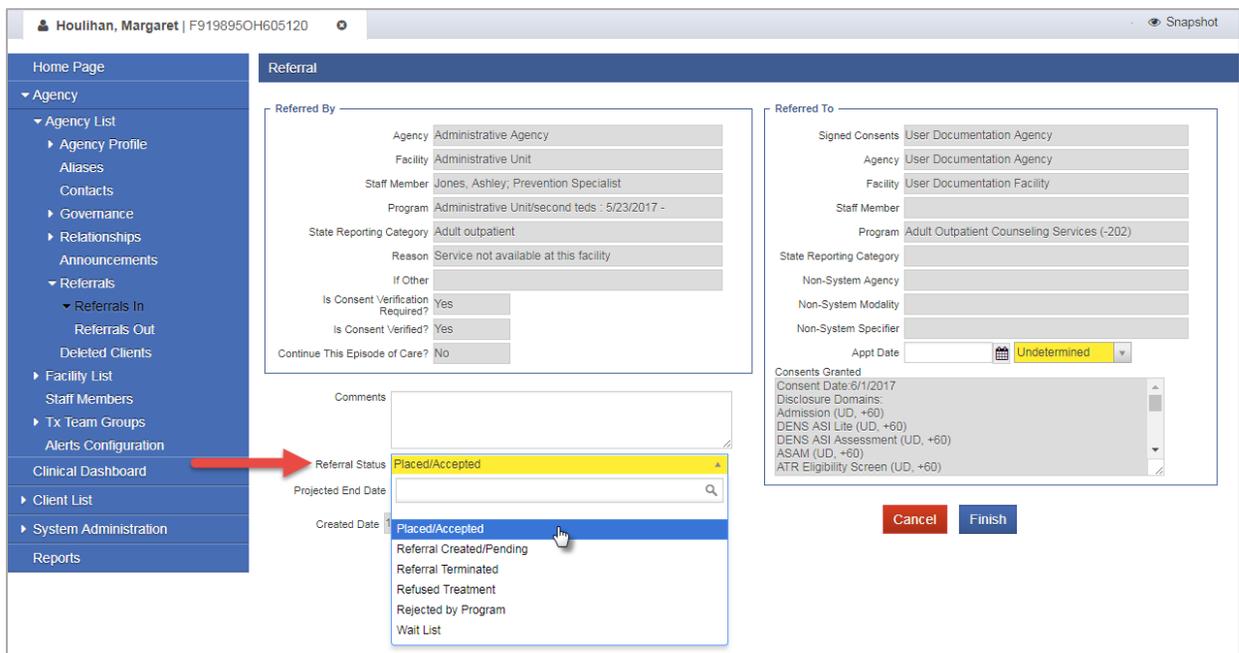


Figure 1-16: Referral screen, Referral Status field

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

(Optional) Additional **Referral Status** reasons to select:

- **Referred/Terminated:** When the referral has been deleted by the referring agency.
- **Refused Treatment:** Select if the client does not want to be treated.
- **Rejected by Program:** If the client is not eligible or is not acting in compliance.
- **Wait List:** If the client is waiting for a slot to open in the program.

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**NOTE** • In PA WITS, once the referral is Placed/Accepted, the client record is created within the Agency, and an Intake is created within the referred to Facility for the client. This is to help eliminate double data entry and help with performance measure reporting. The **Referrals Out** screen allows the admin to create a list of all the client referrals that have been sent out to other agencies.

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## Duplicate Client Check

The duplicate client panel screen will appear when:

- A new client is being added and the generated UCN matches another existing client within the agency.
- A new client is being added and the same current first name and current last name of another existing client within the agency
- A client has been referred to another agency and that agency has an existing client with the same UCN as the referred client.
- A client has been referred to another agency and that agency has an existing client with the same current first name and current last name as the referred client.
- Information message displayed: "This client results in a Unique Client Number (display the UCN) that already exists or a client by this name already exists. Please review the following information and select the appropriate action:"

The screenshot shows the Pennsylvania-WITS UAT interface. At the top, there is a header with the WITS logo, the text "Pennsylvania-WITS UAT", the version "18.22.3", and the user "Jones, Sarah A., CCS" with a "Logout" link. A navigation menu on the left includes "Home Page", "Agency", "Group List", "Clinical Dashboard", "Client List", and "System Administration". The main content area features a message box: "This client results in a Unique Client Number (R20006309000120) that already exists or a client by this name already exists. Please review the following information and select the appropriate action." Below the message are two tables. The first table, "New/Referred Client Information", has columns for Name, Date of Birth, Address, Phone, and Alternate Names, with one row for "Rose, Margaret" (DOB: 6/30/1990, Address: 115 WILLOW ST). The second table, "Existing Client(s) Information", has columns for Actions, Name, Date of Birth, Address, Phone, Unique Client #, and Alternate Names, with one row for "Rose, Daisy" (DOB: 6/30/1990, Address: 115 WILLOW ST, Unique Client #: R20006309000120). A "Cancel" button is located at the bottom right.

Figure 1-17: New/Referred Client Information with Existing Client Information

Review the client information provided. If the referred client is the same as the existing client, hover over the Actions column, and click **Same Client**. If the referred client is different than the existing client, click **Different Client**. (See Figure 2-18)

WITS Pennsylvania-WITS UAT 18.22.3 Administrative Agency, Administrative Unit Jones, Sarah A., CCS Logout Snapshot

This client results in a Unique Client Number (R20006309000120) that already exists or a client by this name already exists. Please review the following information and select the appropriate action.

**New/Referred Client Information** [Different Client](#)

Name	Date of Birth	Address	Phone	Alternate Names
Rose, Margaret	6/30/1990	115 WILLOW ST		

**Existing Client(s) Information**

Actions	Name	Date of Birth	Address	Phone	Unique Client #	Alternate Names
	Rose, Daisy	6/30/1990	115 WILLOW ST		R20006309000120	

**Same Client**

Cancel

Figure 1-18: Existing Client Information, Same Client link

# Referrals Out



**Where:** Agency > Agency List > Referrals > Referrals Out

Check the status of referrals made from your agency to other agencies on the Referrals Out screen.

The screenshot shows the PA-WITS Training interface. The top navigation bar includes the WITS logo, version 18.25.7, the user's name 'Jones, Ashley', and a 'Logout' button. A secondary bar contains 'SSRS Reports' and 'Snapshot' links. The left sidebar menu is expanded to 'Referrals Out'. The main content area is titled 'Referrals Out Search' and contains a search form with 'Referral Status Codes' (Placed/Accepted, Referral Created/Pending, Referral Terminated, Refused Treatment) and a 'Search Criteria' dropdown. Below the search form are input fields for 'Unique Client Number', 'Created Date', 'Referred Date', 'First Name', and 'Last Name', along with 'Clear' and 'Go' buttons. A table titled 'Referrals from Administrative Unit' is displayed below, with an '(Export)' link. The table has the following columns: Actions, Name, Unique Client #, Created Date, Referral Status, Referred To Agency, Referred To Facility, Non System Agency, Referred To Modality, and Referral Comments. The table currently contains no data rows.

Figure 1-19: Referrals Out screen

# Removed Consents



**Where:** Agency > Agency List > Removed Consents

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

The screenshot shows the 'Removed Consented Client Search' interface. On the left is a navigation menu with options like 'Home Page', 'State Waitlist', 'Agency', 'Agency List', 'Agency Profile', 'Aliases', 'Contacts', 'Governance', 'Relationships', 'Announcements', 'Referrals', 'Removed Consents', and 'Deleted Clients'. The main area contains a search form with the following fields: 'Consented From Agency' (dropdown), 'First Name' (text input), 'Client ID' (text input), and 'Last Name' (text input). There are 'Clear' and 'Go' buttons. Below the search form is a table titled 'Removed Consented Client List' with the following columns: 'Actions', 'Agency', 'Unique Client #', 'Client Name', 'DOB', 'SSN', and 'Gender'. The table currently contains no data rows.

Figure 1-20: Removed Consents screen

# Announcements



**Where:** Agency > Agency List > Announcements

The Announcement List can be used to post or edit announcements on the Home Page for select agencies to view. Announcements will only display for a certain period of time, and each has its own end date. Any announcement highlighted in red has been marked high priority by the person that created it.



Figure 1-21: Home Page with Announcement in red text

1. On the left menu, click **Agency** and then click **Announcements**.
2. Click Add New Announcement.



Figure 1-22: Announcements List screen

3. On the **Announcements** screen, enter the required data in the fields specified, then click **Finish**.

Table 1-5: Announcements Fields

Field	Description
<b>Summary</b>	Type a summary of the announcement.
<b>Details</b>	(Optional) Type additional details about the announcement. Users will be able to see these details by hovering over the Actions column, and clicking Review. 
<b>Agency</b>	Read-only field displaying the current agency location name.

Field	Description
<b>Priority</b>	Select from the drop-down field. A Priority of "High" will display the announcement in red.
<b>Start Date</b>	Enter a start date for the announcement.
<b>End Date</b>	Enter an end date for the announcement.
<b>Sort Order</b>	(Optional) If there are multiple announcements displayed at one time, use the sort order field to control the order in which the announcements are listed on the Home Page.

The screenshot shows the 'Announcements' screen. It features a 'Summary' field with a yellow background and a 'Details' field below it. Below the details are several input fields: 'Agency' (User Documentation Agency), 'Priority' (a dropdown menu), 'Start Date' (with a calendar icon), 'End Date' (with a calendar icon), 'Sort Order' (a text input), and 'Created By' (a text input). At the bottom right, there are 'Cancel' and 'Finish' buttons.

Figure 1-23: Announcements screen

- To edit or delete the details of an announcement, click the **Review** link under **Actions** column.

The screenshot shows the 'PA-WITS Training' interface. The top navigation bar includes the WITS logo, version 18.25.7, the current user 'Jones, Ashley A.', and a 'Logout' button. The main content area is titled 'Announcement List' and includes an 'Add New Announcement' link. A table displays the following data:

Actions	Summary	Sort Order	Priority
<a href="#">Review</a> <a href="#">Delete</a>	Test Announcement		N

Figure 1-24: Announcement List screen, Actions links

**NOTE** • High priority announcements will be displayed in red on the Home Page for users to see.

# Alerts



**Where: Agency > Alerts Configuration**

The Home Page Alert functionality allow System Administrators and Agency Administrators to set up custom user alerts for different activities on a particular client or at the agency level. Alerts are run in a batch process each night. It will take until the following day for an alert to disappear from the alert list after the action has been met.

To set up and configure alerts, complete the following steps:

1. On the left menu, click **Agency** then click **Alerts Configuration**.
2. Click Add New Alert.

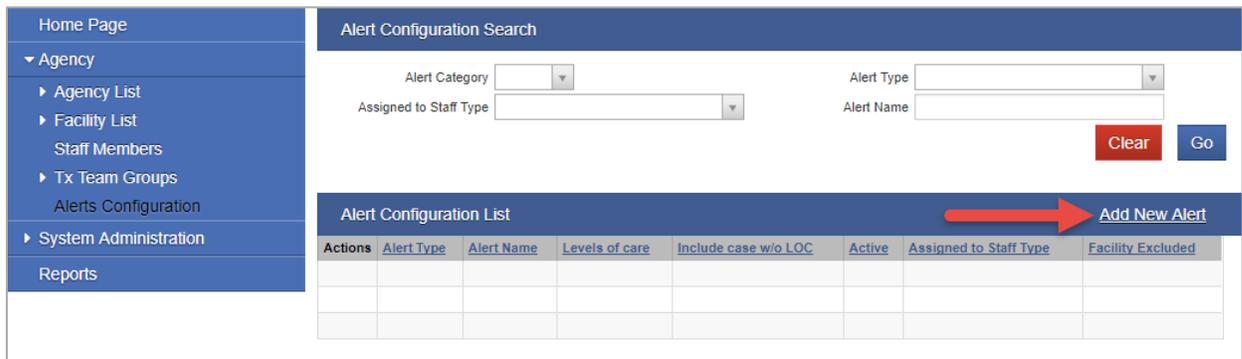


Figure 1-25: Alerts Configuration Search screen

3. When the **Agency Alert Configuration Profile** screen appears, enter data in the required fields including:

Table 1-6: Agency Alert Configuration Profile for Agency Admins

Field	Description
<b>Alert Name</b>	Type a name for this alert.
<b>Alert Type</b>	Select an Alert Type from the drop-down menu; WITS will fill in the Alert Category, Trigger Point and Description.
<b>What message should appear to users?</b>	Type detailed information for this alert.
<b>When is the next activity due (days after the trigger point)?</b>	If the Alert Type is an "Initial Treatment Plan", the trigger point is an admission date. How many days after the admission date should the initial treatment plan be created?
<b>How many days prior to the due date should this alert show up?</b>	If the "Initial Treatment Plan" is due 30 days after admission, when should people be notified? 10 days prior?
<b>Which staff should receive the message?*</b>	Choose from a pre-defined list of staff options in the dropdown. Note, initially, alerts do not go to a "specific" staff member that can be selected directly. If all alerts should go to a specific staff member, choose "Agency Administrator". Agency Administrators have the ability to reassign alerts to specific staff in their agency.
<b>Should message turn red when overdue?</b>	Select Yes or No.

Field	Description
<b>Include cases where no level of care indicated</b>	Select Yes or No.
<b>Facility</b>	When setting up Alerts for a specific agency, you may have the ability to exclude facilities. Either determine that certain facilities should not get the alert, or they may need a different configuration.
<b>Alert should stop being displayed this many days after it is generated</b>	In some cases, an alert may no longer be relevant in 10, 30 or 60 days. An effective date must be entered. Set an expiration date to stop using this alert configuration.

4. When complete, click **Finish**.

Agency Alert Configuration Profile

Alert Name

Alert Type Treatment Plan Review ▼

Trigger Point Next Review Date

Alert Category Client

Alert Description Indicates the active clients where a treatment plan has been created and signed off, and a treatment plan review is due

What message should appear to users?

When is the next activity due (days after the trigger point)?

How many days prior to the due date should this alert show up?

Which staff should receive the message?  ▼

Should message turn red when overdue? Yes ▼

Include cases where no level of care indicated Yes ▼

Levels of Care  
N/A  
0.5 - Early Intervention  
1 - Outpatient Service  
2.1 - Intensive Outpatient

>  
 <

Modify for these Levels of Care

Which facilities follow these rules:

Effective for these Facilities  
Administrative Unit  
Test facility

>  
 <

Excluded Facilities

Alert should stop being displayed this many days after it is generated:

Effective Date

Expiration Date

Cancel
Save
Finish

Figure 1-26: Agency Alert Configuration Profile

\*Which staff should receive this message?

<b>Staff Member</b>	<b>Description</b>
<b>Case Assigned to</b>	Staff member on the Intake screen.
<b>Admitted by</b>	Staff member on the Admission screen.
<b>Treatment Team Primary Care Staff</b>	Staff member on the client's treatment team with the Primary Care Staff indicator set to "Yes".
<b>Treatment Team Case Manager</b>	Staff member on the client's treatment team with the role of "Case Manager".

# Agency Alert List



**Where:** Home Page > Alert List

Agency Administrators have an additional link on their Home Page allowing them to search for agency alerts. This link opens the Agency Alert List, which displays all alerts in the agency and shows if a particular staff member is not completing work on time.

The screenshot shows the Pennsylvania-WITS UAT Home Page. The top navigation bar includes the WITS logo, the text 'Pennsylvania-WITS UAT 18.22.3', the user's name 'Jones, Ashley', and a 'Logout' button. A notification banner at the top states 'There is currently 1 person that has been referred in.' The left sidebar contains a menu with items like 'Home Page', 'State Waitlist', 'Agency', 'Group List', 'Clinical Dashboard', 'Client List', 'System Administration', 'Reports', and 'Support Ticket'. The main content area is titled 'Home' and features an 'Announcements' section with a message about the PA WITS system. Below this is the 'Alert List' section, which has a table with columns for 'Actions', 'Alert Type', 'Client Name; ID', 'Applies To Staff', 'Message', 'Facility', and 'Date Due'. A red arrow points to the 'Search in Agency' link above the table. Below the table is a 'Schedule for' section with fields for 'Start Date' (7/14/2017) and 'End Date', along with 'Refresh', 'Search Calendar', and 'Edit/Add Schedule' buttons. At the bottom, there is another table with columns for 'Actions', 'Start', 'End', 'Summary', and 'Status', showing a scheduled session for 'Life Skills Development Service'.

Figure 1-27: Home Page Alert List, Search in Agency

1. On the Home Page, click Search in Agency to open the Agency Alert List screen.
2. To view all agency alerts, click **Go**. To filter the results, use the Alert Search fields, and then click Go.

The screenshot shows the 'Alert Search' screen. On the left is the same sidebar menu as in Figure 1-27. The main area is titled 'Alert Search' and contains several search filters: 'Agency' (Administrative Agency), 'Facility' (dropdown), 'Alert Type' (dropdown), 'Assigned to' (text input with search icon), 'Client First Name' (text input), 'Client Last Name' (text input), 'Unique Client Number' (text input), and 'Date Due' (text input). There are 'Clear' and 'Go' buttons. Below the search filters is an 'Alert List' table with columns: 'Actions', 'Alert Type', 'Client Name; ID', 'Applies To Staff', 'Message', 'Assigned to', 'Facility', and 'Date Due'. The table is currently empty. A 'Finish' button is located at the bottom right of the screen.

Figure 1-28: Alert Search/List screen

3. Use the **Actions** links to perform additional functions.

- **Review:** redirects to screen relevant to the Alert to perform the required action. For example, if looking at an alert with an alert type "Inactive Client" with the message "Please follow-up as this client has not seen anyone lately", it redirects to the client profile screen to enable you to follow up.
- **Reassign:** opens the Agency Alert Profile screen. To reassign the staff, to remove the old name present in the Assigned To field and type in the new staff member you would like to assign the alert to. When you type the initial or name of the new staff member, click Search and then click on the dropdown menu. The new name will now show up for you to select. When complete, click Finish.
- **Delete:** alerts can be deleted if they are no longer relevant (i.e. if a client leaves treatment).

The screenshot displays the 'Alert Search' and 'Alert List' sections of a software interface. On the left is a navigation menu with items like 'Home Page', 'State Waitlist', 'Agency', 'Group List', 'Clinical Dashboard', 'Client List', 'System Administration', 'Reports', and 'Support Ticket'. The main area contains search filters for Agency, Facility, Alert Type (set to 'Inactive Client'), Assigned to, Client First Name, Client Last Name, Unique Client Number, and Date Due. Below the filters is an 'Alert List' table with columns for Actions, Alert Type, Client Name/ID, Applies To Staff, Message, Assigned to, Facility, and Date Due. A tooltip menu is open over the second row, showing 'Reassign', 'Review', and 'Delete' options.

Actions	Alert Type	Client Name/ID	Applies To Staff	Message	Assigned to	Facility	Date Due
	Inactive Client	Kabitan, Hosta; L4200711000000	N/A	This client has not had an encounter or miscellaneous note created for some period of time.	Jones, Sarah A., CCS	Administrative Unit	7/17/2017
	Inactive Client	Boy, Teen;	N/A	This client has not had an encounter or miscellaneous note created for some period of time.	Manager, ChildCase	Administrative Unit	7/20/2017
	Inactive Client	Bunny, Bugs; B50010228033330	N/A	This client has not had an encounter or miscellaneous note created for some period of time.	O'Reilly, Kristyn	Administrative Unit	7/17/2017
	Inactive Client	Ketchum, Ash; K32502279855550	N/A	This client has not had an encounter or miscellaneous note created for some period of time.	Schrode, Dianne	Administrative Unit	7/20/2017
	Inactive Client	Ketchum, Ash; K32502279855550	N/A	This client has not had an encounter or miscellaneous note created for some period of time.	tester, Christine	Administrative Unit	7/21/2017

Figure 1-29: Alert List, Action items

## Reassign Alert (continuing steps from above)

4. Locate the desired alert to reassign, hover over the Actions column, and then click **Reassign**.
5. In the **Assigned to** field, search for another staff member by typing their last name.



The screenshot shows the 'Agency Alert Profile' form. On the left, there are three input fields: 'Alert Type' with 'Consent Creation', 'Message' with 'The consent form for this client', and 'Facility' with 'RCS Recovery Services'. On the right, there are three fields: 'Client Name; ID' with 'Jones, Joe; 1012MJ07118018', 'Assigned to' with 'Jones', and 'Date Due' with 'Jones, Ann'. A red arrow points to the 'Assigned to' search box. Below the search box, a dropdown menu is open, showing 'Jones, Ann' and 'Jones, Julie A.' with a mouse cursor hovering over the latter. A 'Save' button is partially visible to the right of the dropdown.

Figure 1-30: Reassign Agency Alert

6. Select the staff member, click **Save** and then click **Finish**.



The screenshot shows the 'Agency Alert Profile' form after the staff member has been selected. The 'Assigned to' field now contains 'Jones, Julie A.'. The 'Date Due' field now contains '6/8/2017'. At the bottom right, there are three buttons: 'Cancel' (red), 'Save' (green), and 'Finish' (blue).

# Tx (Treatment) Team Groups



**Where:** Agency > Tx Team Groups

## Role Needed:

- Manage Treatment Team Groups

**Note:** Staff Members must be created in the agency prior to setting up Treatment Team Groups.

When a client is admitted into treatment, clinical staff can be assigned as treatment team members. It is easier to do this if the Agency Administrator sets up Treatment Team Groups. A treatment team group is simply a group of clinicians that commonly work together. WITS security by default assumes that clients will have treatment team members which controls what staff have access to individual client records. When Treatment Team members are not assigned, the role "Non-Treatment Team Access" should be used by all staff to ensure that all clients are visible to all staff.

1. On the left menu, click **Agency**, then click **Agency List**, and then click **Tx Team Groups**.
2. Click Add New Treatment Team Group Record.

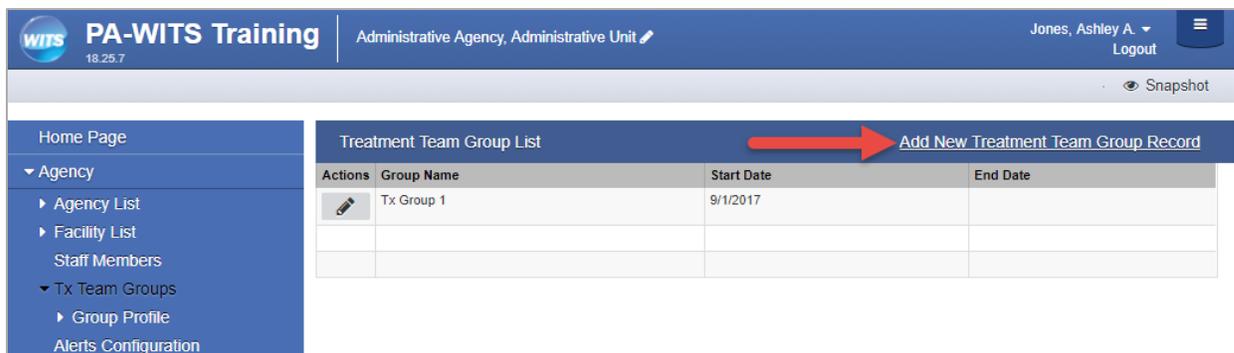


Figure 1-31: Treatment Team Group List screen

3. Complete the **Group Name** field and the **Group Start Date** field. Click **Save**.



Figure 1-32: Treatment Team Group Profile

- Click the Add Staff to Group link.

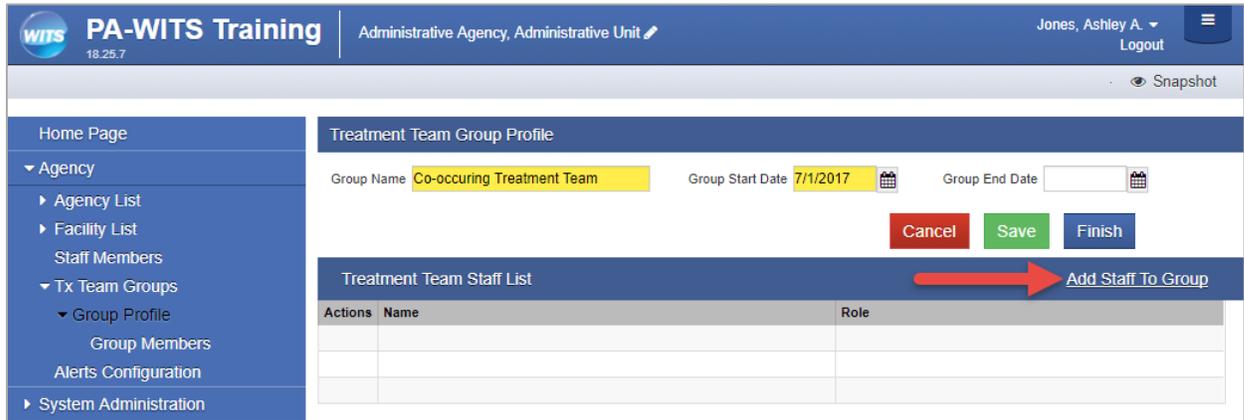


Figure 1-33: Treatment Team Group Profile, Add Staff to Group link

- On the Treatment Team Group Staff screen, select staff members and assign roles as shown in the table below.

Table 1-7: Treatment Team Group Staff fields

Field	Description
<b>Name</b>	Select a staff member from the drop-down field. If the desired staff member is not available within the list, that staff member may need a user account created.
<b>Role</b>	Select the staff member's Role within this Treatment Team Group.

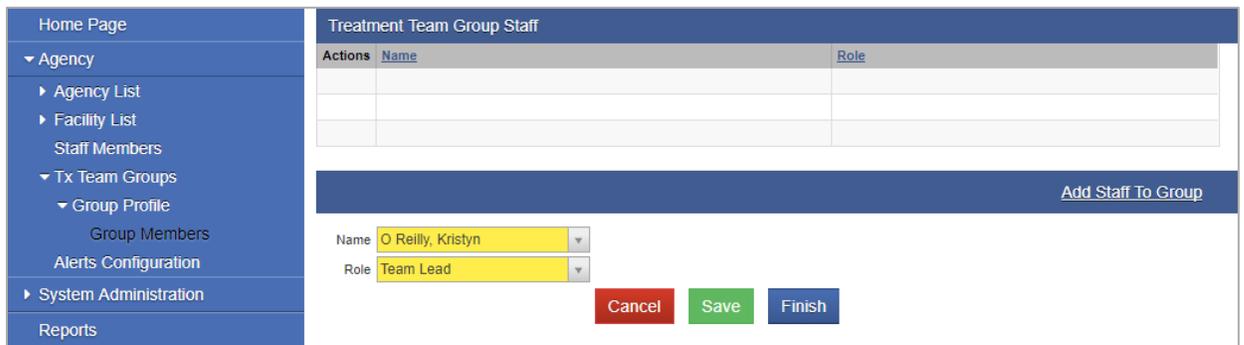


Figure 1-34: Treatment Team Group Staff list

- Click **Save**. Add additional staff members as needed, and then click **Finish**.
- On the Treatment Team Group Profile screen, click **Finish**.

**NOTE** • Each staff member within a Treatment Team Group must have a different **Role** selected. For example, each Treatment Team Group can only have one staff member with the "Team Lead" role. These Roles can be updated as needed.

## Part 2: Facility Administration

### Role Needed:

- Facility Administrator

## Facility Profile



**Where:** Agency > Facility List > Facility Profile

A facility in WITS corresponds to a physical location where services are rendered. Every agency must have at least one facility created, but only the facility profile and address information are required. Optional facility information includes Contacts, Operating Hours, and Special Services.

If an agency determines that a new facility is needed, the Agency Administrator should contact DDAP for assistance.

Before creating a facility, ensure your current **Location** reflects the agency associated with the facility.

- On the left menu, click **Agency**, and then click **Facility List**.
- Click Add New Facility Record.



Figure 2-1: Facility List screen

- On the **Facility Profile** screen, enter the required information:

Table 2-1. Facility Profile Fields

Field Name	Description
<b>Facility Name</b>	Type the facility's name.
<b>Display Name</b>	The facility's display name will appear in drop-down menus throughout the system and should be meaningful to all staff members; this field will automatically copy the first 15 characters from the "Facility Name" field but this information can be edited; there is a 15 character limit for this field.
<b>I-BHS #</b>	Pulled on the NOMS extract. This is also known as the Facility ID number or License Number.
<b>Service Location</b>	Defaulted as the location when creating encounters
<b>Operations Start/End Date</b>	Optional/Informational
<b>Reports Start/End Date</b>	Optional/Informational
<b>Contact</b>	Optional/Informational
<b>Alternate Contact</b>	Optional/Informational
<b>Facility ID</b>	Optional/Informational

Field Name	Description
<b>National Provider ID</b>	Optional/Informational (important when using WITS for billing)
<b>Senate Dist</b>	Optional/Informational
<b>House Dist</b>	Optional/Informational
<b>Cong Dist</b>	Optional/Informational
<b>County</b>	Select from the drop-down menu.
<b>Geo Code</b>	Optional/Informational
<b>URL</b>	Optional/Informational-can be used for marketing purposes for Waitlist feature
<b>Description</b>	Optional/Informational-can be used for marketing purposes for Waitlist feature
<b>Selected Approaches</b>	Optional/Informational-can be used for marketing purposes for Waitlist feature
<b>Selected Languages</b>	Optional/Informational-can be used for marketing purposes for Waitlist feature

The screenshot shows the 'Facility Profile' form with the following fields and sections:

- Facility Name** (text input)
- Display Name** (text input)
- I-BHS State ID** (text input)
- Agency Name** (text input, value: Administrative Agency)
- Service Location** (dropdown menu)
- Operations Start/End Date** (calendar picker, value: 7/5/2017)
- Reports Start/End Date** (calendar picker)
- Contact** (dropdown menu)
- Alternate Contact** (dropdown menu)
- Senate Dist** (dropdown menu)
- National Provider ID** (text input)
- Federal Tax ID** (text input)
- House Dist** (dropdown menu)
- State Business ID** (text input)
- Cong Dist** (dropdown menu)
- Contractor/Locator** (text input)
- URL** (text input)
- County** (dropdown menu)
- Facility Description** (text area)
- Geo Code** (dropdown menu)
- Approaches** (list with right arrow button): 12-step, Cognitive/Behavioral, Family, Humanistic/Existential
- Selected Approaches** (list with dropdown arrow)
- Languages** (list with right arrow button): English, Amharic, Arabic, American Sign Language
- Selected Languages** (list with dropdown arrow)
- Buttons:** Cancel (red), Save (green), Finish (blue), and a blue right arrow button.

Figure 2-2: Facility Profile screen

- When complete, click **Save**.
- Click the **right arrow button** to enter the address.

6. Click Add Address.

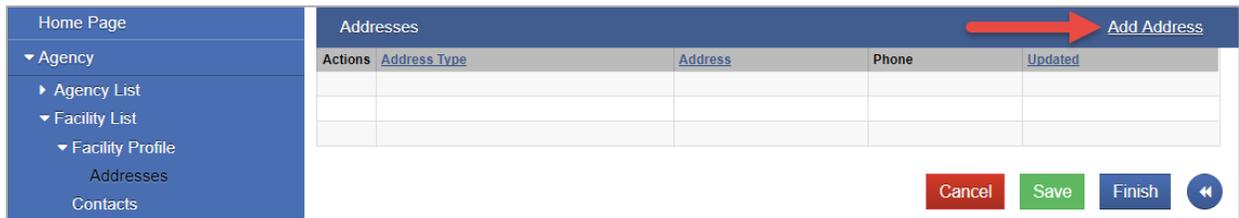


Figure 2-3: Add Facility Address

7. Enter the required information as shown in the table below.

Table 2-2: Address Information fields

Field	Description
<b>Address Type</b>	Select from the drop-down menu.
<b>Confidential</b>	This field defaults to "No"; update if applicable.
<b>Address Line 1</b>	Type the first address line.
<b>Address Line 2</b>	Type the second address line, if applicable.
<b>City</b>	Type the city name.
<b>State</b>	Select state from the drop-down menu.
<b>Zip</b>	Type the zip code.

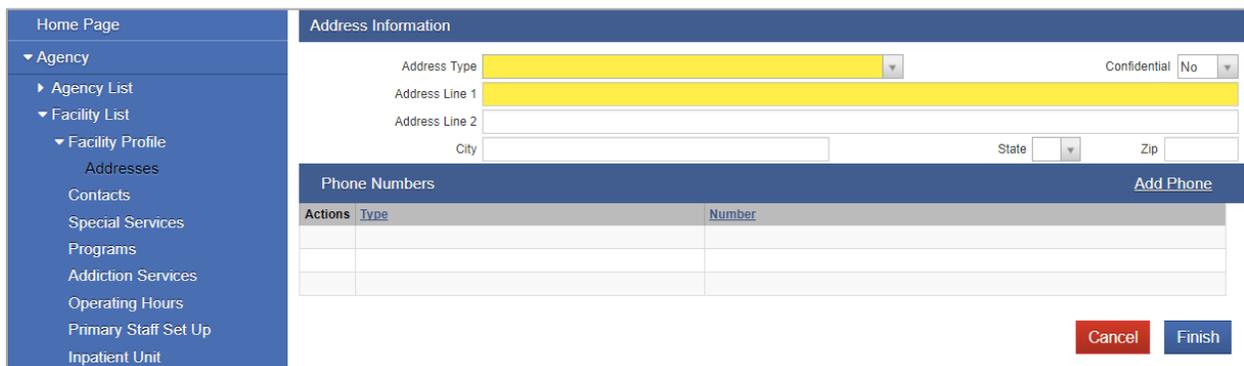


Figure 2-4: Facility Address screen

8. If available, add a telephone number by clicking **Add Phone**.

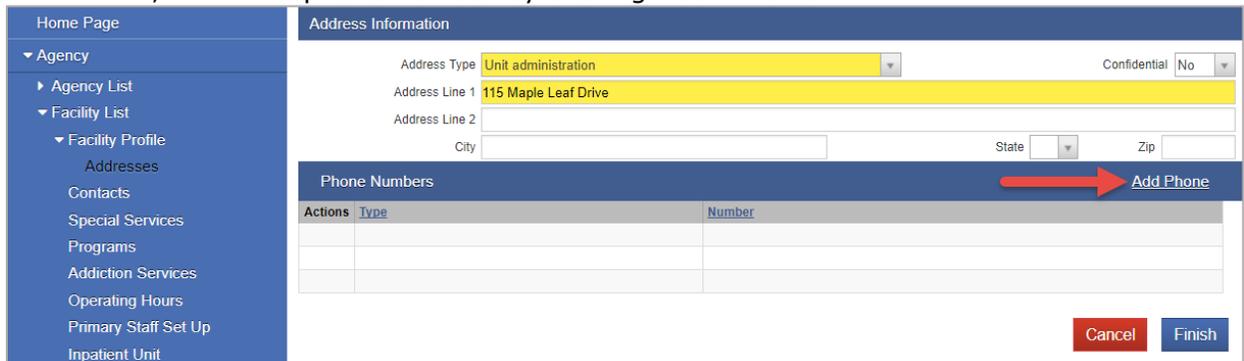


Figure 2-5: Facility Address screen, Add Phone link

Figure 2-6: Facility Address screen, Add Phone Number

9. Enter the phone number, and then click **Finish**.

10. On the Address Information screen, click **Finish**.

Actions	Address Type	Address	Phone	Updated
	Unit administration	115 Maple Leaf Drive	office (552) 121-0015	10/5/2017

Figure 2-7: Facility Address screen with address and phone number added

11. On the Addresses screen, click **Save** and then click **Finish**.

# Contacts



**Where:** Agency > Agency List > Facility List > Contacts

**Note:** Staff Members must be set up in the agency before Contacts can be added to the Facility. Please see the Staff Administrator Guide for information on managing staff accounts.

Information listed in the Contacts information is informational only. On the left menu, click **Agency**, click **Facility List**, and then click **Contacts**.

1. Click Add Contact.

The screenshot shows the 'Contacts for Administrative Unit' interface. On the left is a navigation menu with 'Agency' expanded to 'Facility List' and 'Contacts' selected. The main area features a table with columns: Actions, Contact Type, Name, Status, Created, and Effective. Below the table is a form with fields for Staff, Contact Type, Effective Date, Status, and Manager Name. A red arrow points to the 'Add Contact' button in the top right of the form area. A 'Finish' button is located at the bottom right.

Figure 2-8: Facility Contacts screen

2. Complete the fields.

The screenshot shows the same 'Contacts for Administrative Unit' interface as Figure 2-8, but with the form fields populated. The 'Staff' dropdown is set to 'Garg, Deeksha', 'Contact Type' is 'Referral', 'Effective Date' is '7/1/2017', and 'Status' is 'Active'. The 'Add Contact' button is now a text link. At the bottom right, there are three buttons: 'Cancel' (red), 'Save' (green), and 'Finish' (blue).

Figure 2-9: Facility Contacts screen, add new contact

3. Click **Save**. Add additional contacts if needed.
4. Click **Finish**.

# Special Services



**Where:** Agency > Agency List > Facility List > Special Services

1. On the Special Services screen, select **Special Population Services** from the mover box, if applicable.
2. Click Add New Information Item, if applicable.

Figure 2-10: Facility Special Services screen, Add New Information Item link

3. Select an item from the **Facility Supported Services** drop-down list.

Figure 2-11: Add New Information Item screen

4. Click **Save** then click **Finish**.

Actions	Service Information	Details
	Is Therapy Available On-site?	Yes
	Does the Facility Have Staff Credentials Available On-site?	Yes

5. Click **Save**.

# Programs



**Where:** Agency > Agency List > Facility List > Programs

## Role Needed:

- Program Set Up

**Note:** DDAP has set up all TEDS programs and will continue to create any TEDS programs.

Each facility in WITS should have one or more Programs listed to indicate the type of treatment it provides to clients. For TEDS reporting, each facility needs to have at least one Program marked with an indicator "Report to TEDS=Yes". Each program must have a Modality or Level of Care. Programs that are set up outside of treatment can select a modality type of unknown.

- On the left menu, click **Programs**.
- Click Add New Program Record.



Figure 2-12: Program List screen

- On the Program Setup screen, complete the fields as shown in the table on the following page (Table 3-3).

Table 2-3: Program Setup Fields

Field	Description
<b>Program Name</b>	Program may be titled anything you or the provider desires.
<b>Display Name</b>	Type the program's display name. Note: this field is limited to 15 characters.
<b>Domain</b>	Select the domain from the drop-down list.
<b>Modality</b>	For federal reporting, the Modality will set the TEDS reporting code behind the scenes.
<b>Current Enrolled</b>	Read-only field displaying the number of clients currently enrolled in the program.
<b>Program Type</b>	Read-only field.
<b>ASAM Level of Care</b>	For instances that follow ASAM criteria, it is important that the Level of Care be set according to the appropriate ASAM Level of Care.
<b>PCPC Level of Care</b>	For instances that follow PCPC, it is important that the Level of Care be set according to the appropriate PCPC Level of Care.
<b>Residence</b>	Select the location from the drop-down list. (County code table)
<b>Report to State</b>	Select Yes/No.
<b>Report to TEDS</b>	Select Yes/No.
<b>Age Group</b>	Options include: < 12, teens (12-19), 20-30, 31-40, 41-50, 51-60, > 60, Youth, Adult, or All Age Groups.
<b>Waitlist Availability Type</b>	Options include: None, Cross-agency, or Local only.
<b>Gender Specific</b>	Options include: Female, Male, or Not Specific.
<b>Program Start Date</b>	Enter the program's start date.
<b>Program End Date</b>	Add an end date when the program is no longer available.

The screenshot displays the 'Program Setup' form within the PA-WITS Training application. The form includes the following fields and controls:

- Agency Name:** Administrative Agency
- Facility Name:** Administrative Unit
- Program Name:** (Yellow highlight)
- Display Name:** (Yellow highlight)
- Domain:** (Dropdown menu)
- Modality:** (Dropdown menu)
- Current Enrolled:** (Read-only field)
- Program Type:** (Read-only field)
- ASAM Level of Care:** (Dropdown menu)
- PCPC Level of Care:** (Dropdown menu)
- Residence:** (Dropdown menu)
- Report to State:** Yes (Dropdown menu)
- Report to TEDS:** (Dropdown menu)
- Available Reporting Guidelines:** (List box)
- Selected Reporting Guidelines:** (List box)
- Age Group:** (Dropdown menu)
- Gender Specific:** (Dropdown menu)
- Waitlist Availability Type:** (Dropdown menu)
- Program Start Date:** (Date picker)
- End Date:** (Date picker)

At the bottom of the form, there are three buttons: **Cancel** (red), **Save** (green), and **Finish** (blue). Below the form is a **Capacity List** table with the following structure:

Actions	Capacity Type	Capacity	Start Date	End Date

An **Add New Capacity** button is located to the right of the table header.

Figure 2-13: Program Setup fields

**Program Setup**

Agency Name: Administrative Agency  
 Facility Name: Administrative Unit  
 Program Name: Case Management  
 Display Name: Case Management  
 Domain: Substance Abuse  
 Modality: 810-Intake, Evaluation, and Referral  
 Current Enrolled:   
 Program Type: Substance Abuse Treatment  
 ASAM Level of Care: N/A  
 PCPC Level of care: N/A  
 Residence:   
 Report to State: No  
 Report to TEDS: No

Available Reporting Guidelines:   
 Selected Reporting Guidelines:   
 Age Group:   
 Gender Specific:   
 Waitlist Availability Type: None  
 Program Start Date: 1/1/2017  
 End Date:   
 Cancel Save Finish

**Capacity List** [Add New Capacity](#)

Actions	Capacity Type	Capacity	Start Date	End Date

Figure 2-14: Program Setup fields, completed

- Click **Save**.
- Click Add New Capacity.

**Capacity List** [Add New Capacity](#)

Actions	Capacity Type	Capacity	Start Date	End Date

- On the Program Capacity Details screen, complete the fields as shown in the table below.

Table 2-4: Program Capacity Details fields

Field	Description
<b>Capacity Type</b>	Select Beds or Slots from the drop-down list.
<b>Daily Capacity</b>	Type the maximum number of Beds or Slots that can be filled on one day.
<b>Start Date</b>	Enter the start date for this capacity type.
<b>End Date</b>	(Optional)
<b>Note</b>	(Optional)

**Program Capacity Details**

Capacity Type: Slots

Daily Capacity:

Start Date:

End Date:

Note:

Cancel Save Finish

Figure 2-15: Program Capacity Details screen

7. Click **Finish**.
8. Click **Save** and then click **Finish**. Add additional programs if needed.

Actions	Program Name	Modality	# Slots	Current Enrolled	Residence	Gender Specific	Term
	Case Management	810-Intake, Evaluation, and Referral	20	0	Forest	Not Specific	1/1/2017 -

Figure 2-16: Facility Program List screen, Review Action link

# Addiction Services



**Where:** Agency > Agency List > Facility List > Addiction Services

Enter addiction services for your facility, if applicable.

1. On the left menu, click **Agency**, then click **Facility List**, and then click **Addiction Services**.

Home Page	Addiction Services	
▼ Agency	Agency Name	Administrative Agency
▶ Agency List	Facility Name	Administrative Unit
▼ Facility List	Addiction Service	Selected Addiction Service
▶ Facility Profile	None	Alcohol
Contacts	Cocaine/Crack	Over-The-Counter Medications
Special Services	Marijuana/Hashish	
Programs	Heroin	
Addiction Services	Methadone	
Operating Hours	Other Opiates And Synthetics	
Primary Staff Set Up	PCP	
Inpatient Unit	Hallucinogens	
Staff Members	Methamphetamine/Speed	
	Other Amphetamines	
	Other Stimulants	
	Benzodiazepines	
	Cancel	Save
		Finish

Figure 2-17: Addiction Services screen

2. Click **Save** and then click **Finish**.

# Operating Hours



**Where:** Agency > Agency List > Facility List > Operating Hours

The facility's operating hours can be entered on this screen.

- Please enter times in **hh:mm** format followed by "**am**" or "**pm**" (ex: 08:30 AM).
- Multiple ranges can be created within one day, such as 8:00 AM-12:00 PM (Range 1), then 12:30 PM-8:00 PM (Range 2).

1. On the left menu, click **Operating Hours**.
2. Enter the facility's operating hours.

**PA-WITS Training** 18.25.7 Administrative Agency, Administrative Unit Jones, Ashley A. Logout

Snapshot

Home Page

Agency

- Agency List
- Facility List
  - Facility Profile
  - Contacts
  - Special Services
  - Programs
  - Addiction Services
  - Operating Hours
  - Primary Staff Set Up
  - Inpatient Unit
  - Staff Members
  - Tx Team Groups
  - Alerts Configuration
- System Administration
- Reports

**Facility Operating Hours**

*\* Please enter times below in hh:mm format followed by "am" or "pm"(ex: 08:30 AM)*  
*\* You can create multiple ranges within one day, like 9:00 am - 11:00 am, then 1:00 pm - 3:00 pm.*  
Set Tuesday to Friday same as Monday

Day	Range 1	Range 2	Range 3
Monday	8:00 AM - 12:00 F	12:30 P - 7:00 PA	<input type="text"/> - <input type="text"/>
Tuesday	8:00 AM - 12:00 F	12:30 P - 7:00 PA	<input type="text"/> - <input type="text"/>
Wednesday	8:00 AM - 12:00 F	12:30 P - 7:00 PA	<input type="text"/> - <input type="text"/>
Thursday	8:00 AM - 12:00 F	12:30 P - 7:00 PA	<input type="text"/> - <input type="text"/>
Friday	8:00 AM - 12:00 F	12:30 P - 7:00 PA	<input type="text"/> - <input type="text"/>
Saturday	<input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/>
Sunday	<input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/>

Cancel Save Finish

Figure 2-18: Facility Operating Hours

3. Click **Save**.

## Primary Staff Set Up



**Where:** Agency > Agency List > Facility List > Primary Staff Set Up

**Note:** The Primary Staff Set Up screen must be set up to use the Clinical Dashboard feature.

At the Facility level, each facility sets up how the primary staff person is assigned to a client's case. This set up will control staff member's view on the **Clinical Dashboard** screen. The Primary Staff Set Up screen includes three (3) drop-down fields, Primary, Secondary, and Tertiary, and there are four (4) values to select from (see below for an explanation and screen captures of these values).

The values selected for these fields will rank how a staff member is assigned to a client's case. For an example, please see Figure 2-23 and Table 2-5 below. See the PA DDAP WITS End User Clinical Guide for more information about the Clinical Dashboard.

Here is the list of the values available in the drop-down fields, with explanation and screen capture:

- **Admitted by:** staff person assigned at admission, on the Admission Profile screen.

The screenshot shows the 'Admission Profile' screen. At the top, there is a blue header with the title 'Admission Profile'. Below this, a grey bar contains personal information: 'Full Name: Asteraceae, Zinnia', 'Residence/Borough: Forest', 'Referral Source: Self', 'Race: Two or More Races', 'Gender: Female', 'Ethnicity: Unknown', 'DOB: 8/1/1999', and 'Age: 17'. Below the grey bar, there are three fields: 'Admission Type' with a dropdown menu showing 'Initial Admission', 'Admission Staff' with a dropdown menu showing 'Jones, Ashley; Case Manager' (highlighted with a red border), and 'Admission Date' with a calendar icon. At the bottom, there is an 'Administrative Checklist' section with a list of items: 'Assessed individual for any special needs' and 'Completed PCPC'. To the right of this list is a 'Selected Administrative Checklist Items' section, which is currently empty. At the bottom right of the screen, there are four buttons: 'Cancel' (red), 'Save' (green), 'Finish' (blue), and a blue circular button with a right-pointing arrow.

Figure 2-19: Admission Profile screen, Admitted by staff member

- **Case assigned to:** staff person assigned at intake, on the Intake Case Information screen.

**Intake Case Information**

Intake Facility: Administrative Unit  
 Intake Staff: OREilly, Kristyn  
 Initial Contact: By Appointment  
 Is Client Public Funded?:  
 Funding SCA: Adams  
 Source of Referral: SCA

Case #: 1  
 Case Status: Open Active  
 Initial Contact Date: 5/6/2017  
 Intake Date: 5/7/2017  
 Pregnant: Not Applicable  
 Due Date:

Figure 2-20: Intake Case Information screen, Case assigned to staff member

- **Treatment Team Primary Care Member:** staff person on the client’s treatment team where the “Primary care” indicator is set to “Yes”.

**Treatment Team**

Actions	Team Member Name	Is Primary Care Member?	Review Member	Role/Relation	Start Date	End Date

**Assign Group** Add Team Member

Staff Name: Jones, Ashley  
 Non Staff Name:  
 Add Collateral Contact  
 Role/Relation: Case Manager  
 Review Member: Yes  
 Primary Care Staff: Yes  
 Deny Access to Client Records: No

Start Date: 6/30/2017  
 End Date:  
 Notes:  
 Selected Sub-Teams: Recovery

Buttons: Cancel, Save, Finish

Figure 2-21: Treatment Team screen, Primary Care Staff member

- **Treatment Team Case Manager:** staff person on the client’s treatment team with the relationship of “Case Manager”.

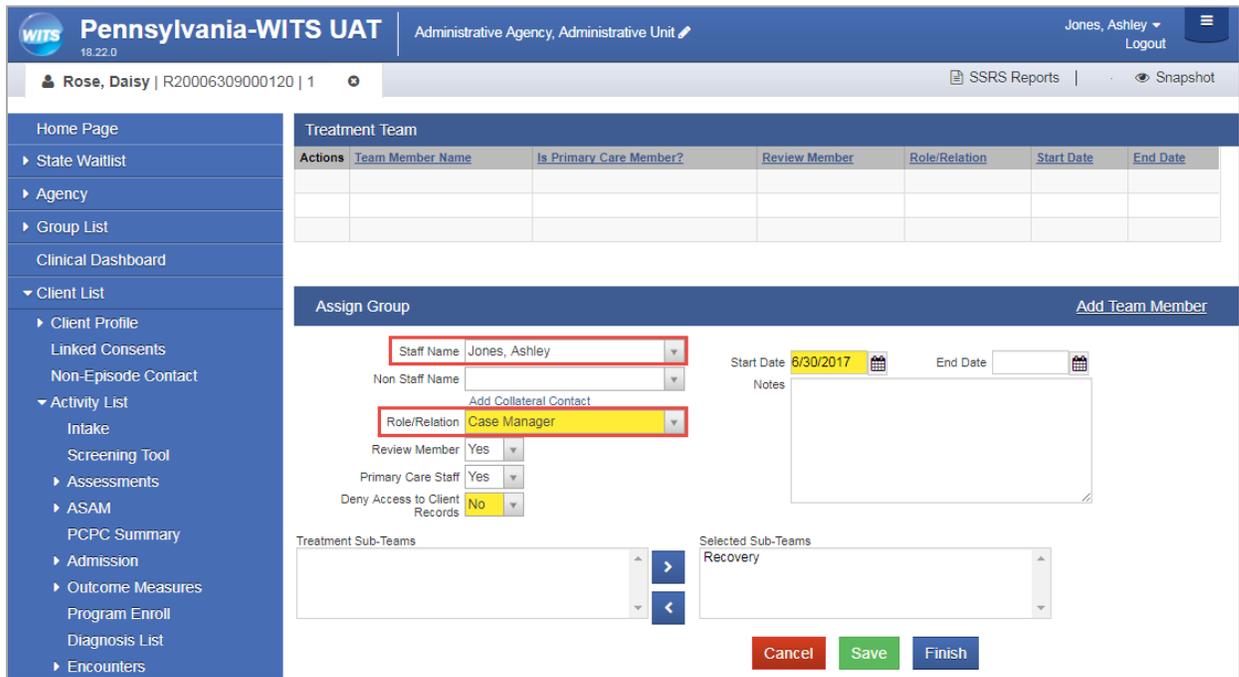


Figure 2-22: Treatment Team screen, Case Manager Role/Relation

1. On the left menu, click **Agency**, click **Facility List**, and then click **Primary Staff Set Up**.

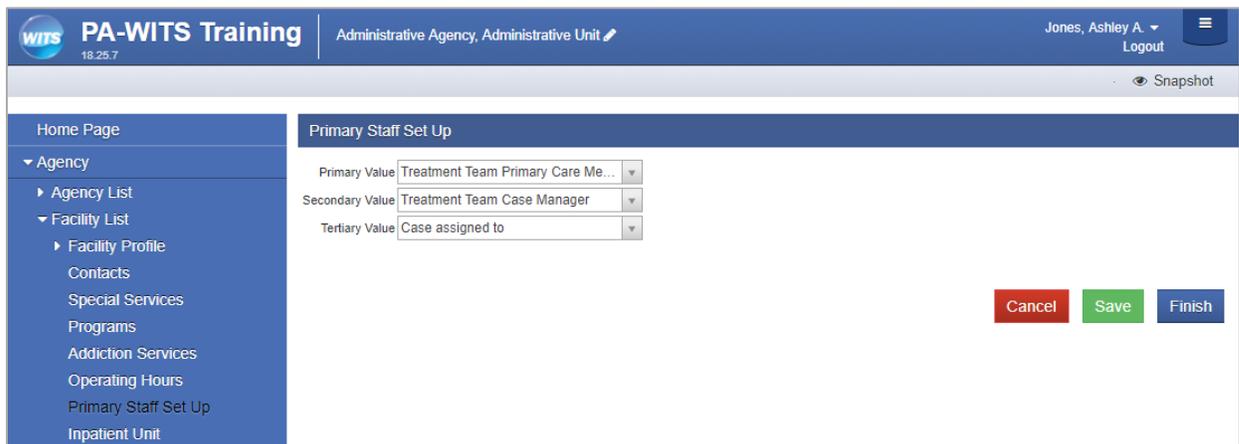


Figure 2-23: Primary Staff Set Up screen

2. Complete the fields.

Table 2-5: Primary Staff Set Up fields

Field	Description
<b>Primary Value</b>	Select an option from the drop-down list. This staff member will be the primary person assigned to the client's case and these clients will be displayed on the staff member's Clinical Dashboard. In the example shown in Figure 2-23, the "Treatment Team Primary Care Member" option selected.
<b>Secondary Value</b>	Select an option from the drop-down list. This staff member will be assigned to the client's case if the Primary Value staff member type has not been assigned to the client. In the example shown in Figure 2-23 above, if the client does not have a Primary Care Member on their Treatment Team, the "Treatment Team Case Manager" will be assigned to the client's case.
<b>Tertiary Value</b>	Select an option from the drop-down list. This staff member will be assigned to the client's case if the Primary and Secondary Value staff member types have not been assigned to the client. In the example shown in Figure 2-23, the "Case assigned to" staff member will be assigned to the client's case if the client does not have a Case Manager or Primary Care Member on their Treatment Team.

3. Click **Save**, then click **Finish**.

## Closing a Facility



**Where:** Agency > Agency List > Facility List > Facility Profile

When a facility ceases operations, the Agency Administrator can close the facility in PA WITS.

On the Facility Profile screen, enter the Operations End Date. After an end date has been entered, the facility will not be visible to any user, other than the Agency Administrator and the DDAP PA WITS Administrators. Staff who have the facility assigned to their account will no longer be able to see patient data or create new patient data associated with that facility.

As a reminder, licensed treatment providers must adhere to all PA Licensing regulations and DDAP requirements regarding the retention of patient records.

The screenshot shows the 'Facility Profile' form. The 'Operations Start/End Date' field is highlighted with a red arrow pointing to the end date input. The 'Agency Name' is set to 'Administrative Agency'. The 'County' field is also highlighted in yellow. The 'Approaches' section lists '12-step', 'Cognitive/Behavioral', 'Family', and 'Humanistic/Existential'. The 'Languages' section lists 'English', 'Amharic', 'Arabic', and 'American Sign Language'. At the bottom, there are buttons for 'Cancel', 'Save', 'Finish', and a next step button.

## Part 3: Staff Administration

Part of Agency Administration includes creating and managing staff accounts. WITS has been designed so that an Agency Administrator can delegate the task of Staff Management to a different user through a specific role without giving that same person all the access that come with the Agency Administrator role.

Please see the **PA DDAP WITS Staff Administrator Guide** for information on managing staff accounts.

# Part 4: WITS Reports



Where: > Reports

Within the WITS application, a catalog of reports is made available to any user that is given the Reporting Role. These reports are available in the base version of WITS. A purpose for each report is available in the header when the report has been run and by hovering your mouse over the report name. These reports were designed to be run at the Agency level.

Figure 4-1: Report Catalog screen

## Access Reports

Table 4-1: Access Reports in Report Catalog

Report Title	Description
<b>Admissions: Client Demographics</b>	Purpose: Report will provide counts and percentages of admitted clients by client demographic
<b>Agency Client Movement</b>	Purpose: Summarizes number of admissions, clients receiving services, discharges, and average LOS by Agency.
<b>Client Demographic by Substance</b>	Purpose: To display demographic information by substance. Report opens as a PDF files.
<b>Program Client Movement</b>	Purpose: This report lists the # of program enrollments, # of clients receiving services, average length of stay for active clients, # of program disenrollments and average length of stay for disenrolled clients by program.
<b>Referrals in by Agency</b>	Purpose: This report lists counts and percentages for referral status for all clients who have been referred in by outside agencies. Percent referred by this agency and percent referred in from all agencies out of total clients is also given.
<b>Referrals out by Agency</b>	Purpose: Provides counts and percentages of clients referred out by agencies prior, during and after treatment.
<b>Waitlist by Agency, Facility &amp; Program</b>	Purpose: This report shows counts of clients on the waitlist, added to the waitlist, and removed from the waitlist by the various reasons; average wait time; and count of clients referred to interim services by Region, Agency, Facility, and Program.

## QA/QC Reports

Table 4-2: QA/QC Reports in Report Catalog

Report Title	Description
<b>Program Enrollment Counts</b>	Purpose: This report is designed to display the number of clients that were enrolled and dis-enrolled to/from all programs within an agency within a specific date range. Enrollment Count at End of Period: Unduplicated count of clients active in this program on the end date of the specified date range. Did Not Receive Services in Last 60 Days: Count of clients identified in Enrollment Count at End of Period who also have not received services in any program in the 60 days before the end date of the specified date range. Did Not Receive Services in Last 30 Days: Count of clients identified in Enrollment Count at End of Period who also have not received services in any program in the 30 days before the end date of the specified date range.
<b>Client List by Program</b>	Purpose: Report lists all clients by program and whether they are currently enrolled. If client is not currently enrolled, reason for termination is given.
<b>Agency/Facility Client Terminations</b>	Purpose: This report is designed to highlight any patterns of termination within a program by providing counts of clients terminated for varying reasons.
<b>Unfinished Client Activities</b>	Purpose: Listing of unfinished client activities.

## Miscellaneous

Table 4-3: Miscellaneous Reports in Report Catalog

Report Title	Description
<b>Admission Data</b>	Purpose: To report raw Admission data. Export data to Excel spreadsheet.
<b>Client Profile Data</b>	Purpose: To report raw Client Profile data. NOTE: Many fields are NOT shown on this screen in order to improve the performance of this report. Please click the 'Export' button, then either 'Open' or 'Save' to view all of the data using Microsoft Excel.
<b>Combined Note Data</b>	Purpose: To report raw Encounter note and Miscellaneous note data. NOTE: Many fields are NOT shown on this screen in order to improve the performance of this report. Please click the 'Export' button, then either 'Open' or 'Save' to view all of the data using Microsoft Excel.
<b>WITS Data Dictionary</b>	Export data dictionary to Excel spreadsheet.
<b>Discharge Data</b>	Purpose: To report raw Discharge data. Export Discharge Data to Excel spreadsheet.
<b>Encounter Data</b>	Purpose: To report raw Encounter data. NOTE: Many fields are NOT shown on this screen in order to improve the performance of this report. Please click the 'Export' button, then either 'Open' or 'Save' to view all of the data using Microsoft Excel.
<b>Outcome Measure Data</b>	Purpose: To report raw Outcome Measure data. NOTE: Many fields are NOT shown on this screen in order to improve the performance of this report. Please click the 'Export' button, then either 'Open' or 'Save' to view all of the data using Microsoft Excel.

## Security

Table 4-4: Security Report in Report Catalog

Report Title	Description
<b>Staff Role Assignment</b>	Purpose: Report lists the staff security roles, staff member type, role level, agency, facility assignments, and employment start and end date.