pennsylvania
DEPARTMENT OF DRUG AND ALCOHOL PROGRAMS

WITS

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/

Contents

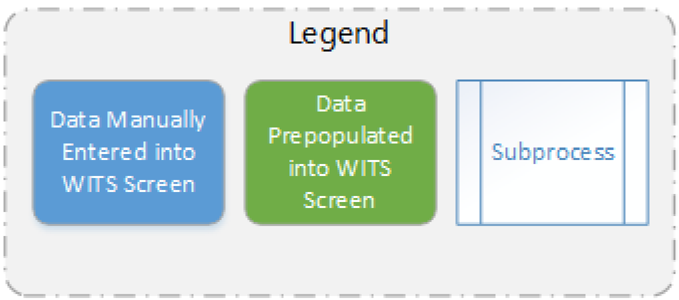
Part 1: Types of Agency Workflows

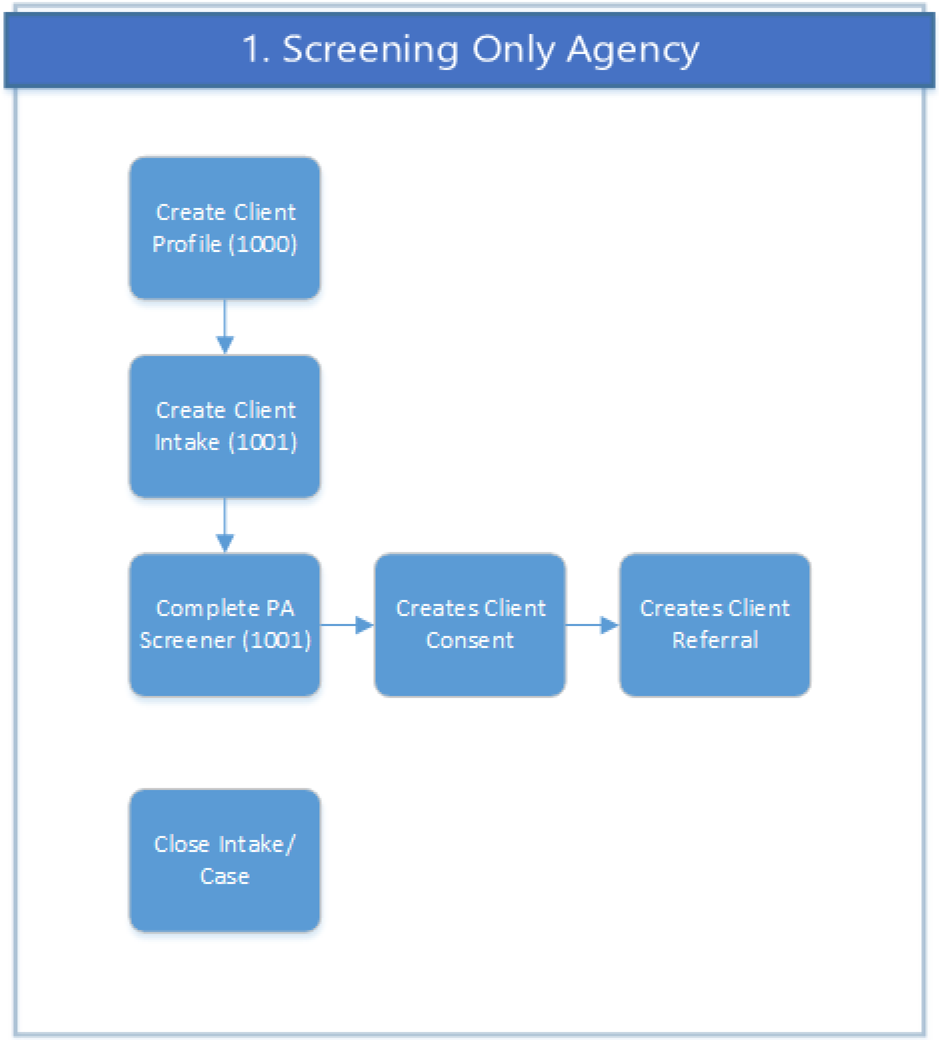
Work Flow Diagrams

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.

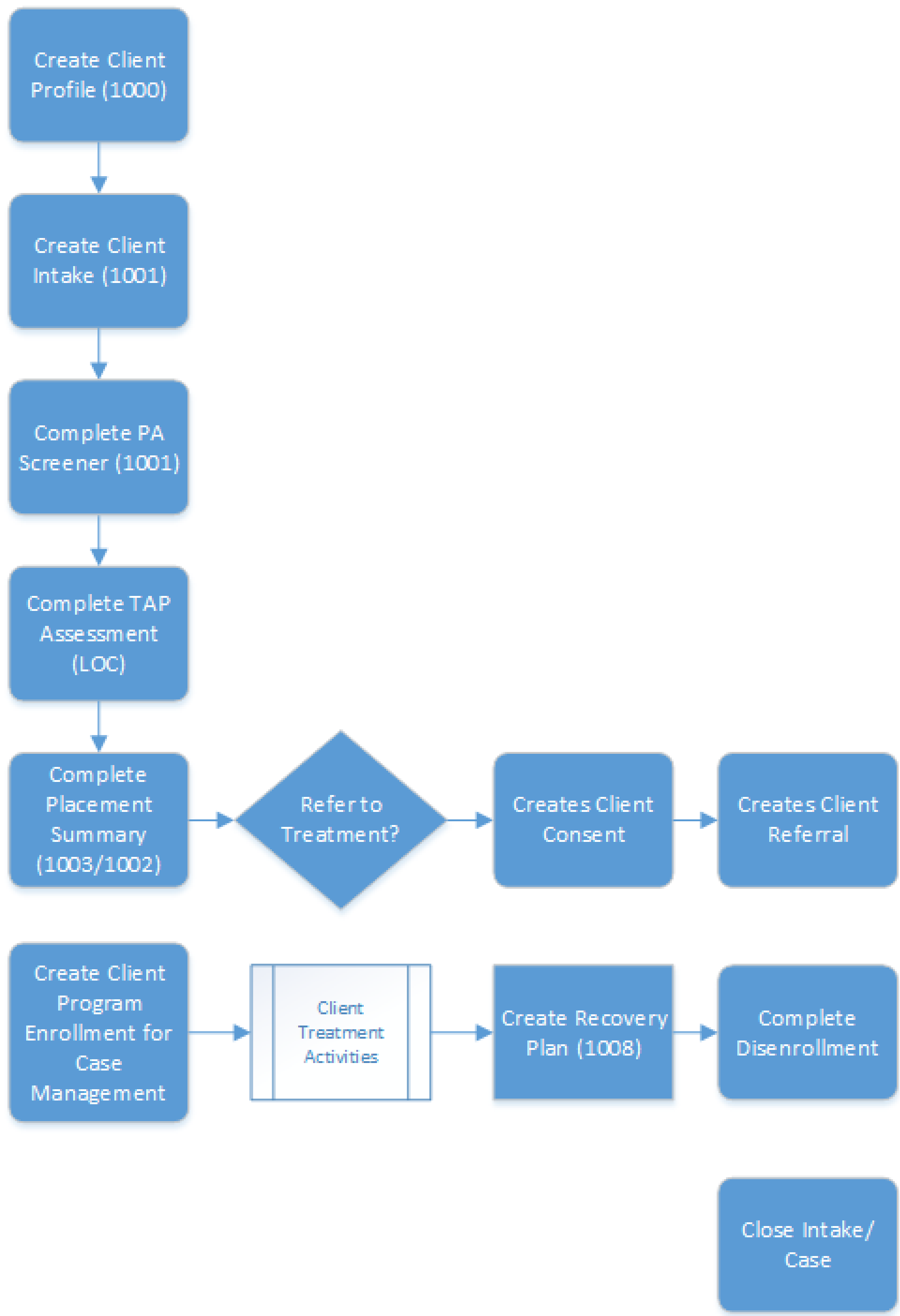
Before an Agency Administrator can understand what type of staff to set up and how to give staff access to the system, they must understand how the data their agency will enter into PA WITS fits into the overall PA WITS workflow. This guide identified 5 different types of Agencies to illustrate the workflow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

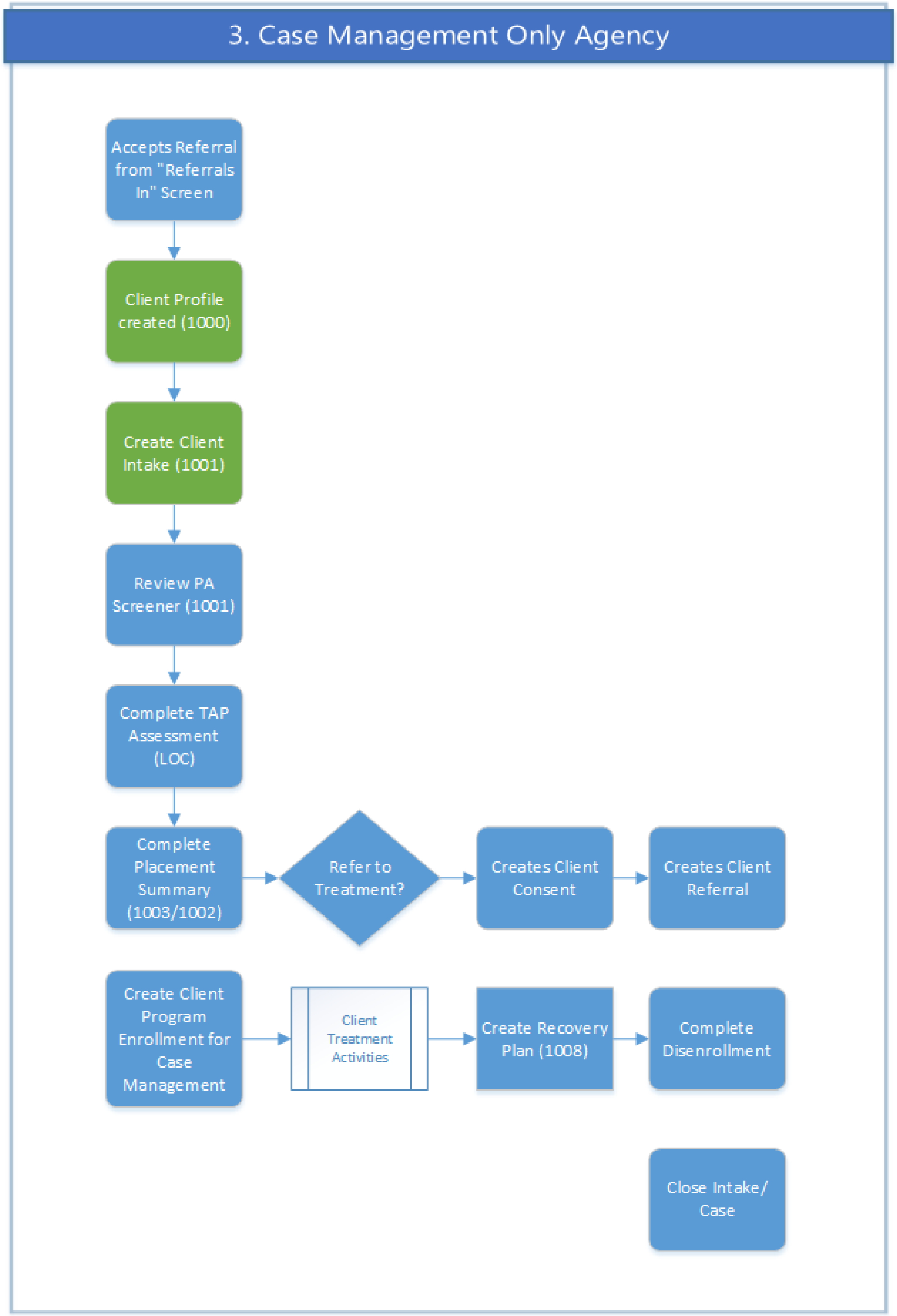
Note: It is also important to understand the workflow activities that happen outside your own agency, especially when consenting and referring clients to other Agencies with in PA WITS. PA WITS has been designed to capture specific pieces of information on an individual client level as they move from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

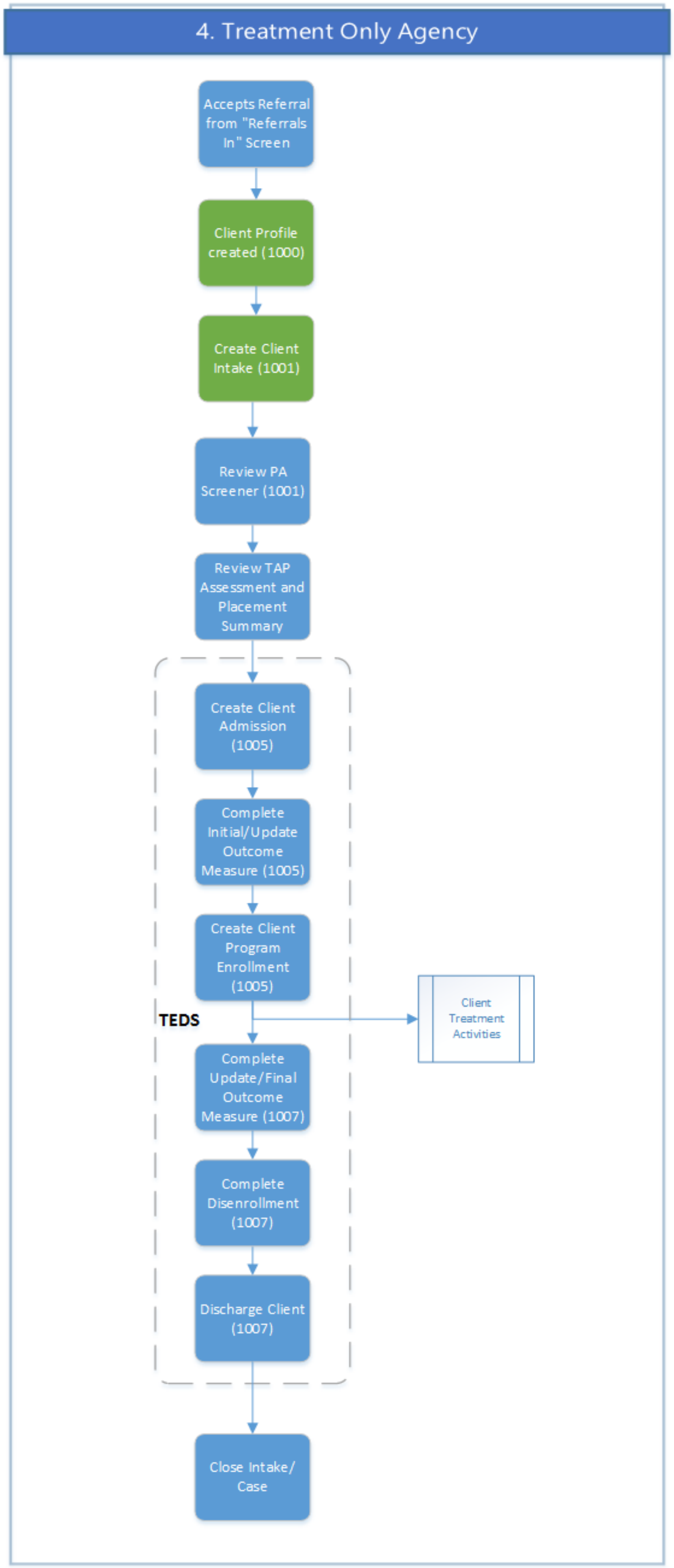


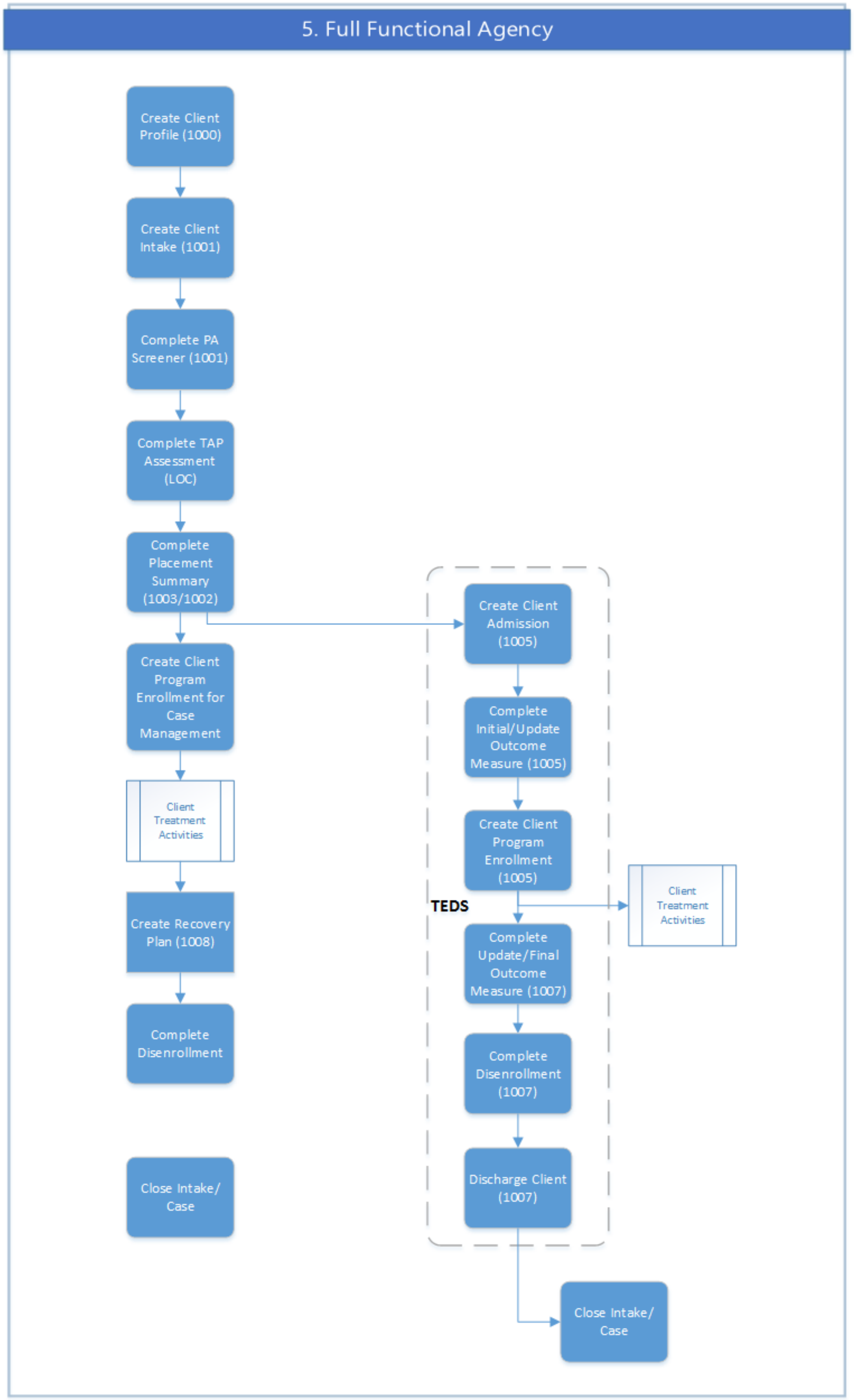

1. Screening Only Agency
Create Client Profile (1000)
Create Client Intake (1001)
Complete PA Screener (1001)
Creates Client Consent
Creates Client Referral
Close Intake/ Case

2. Screening Agency with Case Management




3. Case Management Only Agency
Accepts Referral from "Referrals In" Screen
Client Profile created (1000)
Create Client Intake (1001)
Review PA Screener (1001)
Complete TAP Assessment (LOC)
Complete Placement Summary (1003/1002)
Refer to Treatment?
Creates Client Consent
Creates Client Referral
Create Client Program Enrollment for Case Management
Client Treatment Activities
Create Recovery Plan (1008)
Complete Disenrollment
Close Intake/ Case


4. Treatment Only Agency
Accepts Referral from "Referrals In" Screen
Client Profile created (1000)
Create Client Intake (1001)
Review PA Screener (1001)
Review TAP Assessment and Placement Summary
Create Client Admission (1005)
Complete Initial/Update Outcome Measure (1005)
Create Client Program Enrollment (1005)
TEDS
Client Treatment Activities
Complete Update/Final Outcome Measure (1007)
Complete Disenrollment (1007)
Discharge Client (1007)
Close Intake/ Case


5. Full Functional Agency
Create Client Profile (1000)
Create Client Intake (1001)
Complete PA Screener (1001)
Complete TAP Assessment (LOC)
Complete Placement Summary (1003/1002)
Create Client Program Enrollment for Case Management
Client Treatment Activities
Create Recovery Plan (1008)
Complete Disenrollment
Close Intake/ Case
TEDS
Create Client Admission (1005)
Complete Initial/Update Outcome Measure (1005)
Create Client Program Enrollment (1005)
Client Treatment Activities
Complete Update/Final Outcome Measure (1007)
Complete Disenrollment (1007)
Discharge Client (1007)
Close Intake/ Case

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
Agency Name	The agency's name.
Display Name	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.
Agency Type	Select from the drop-down menu.
Contract Role	Select either "Provider" or "Contractor".
County	Select from the drop-down menu;
Agency Faith Based	This field defaults to "No".
Domains	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.

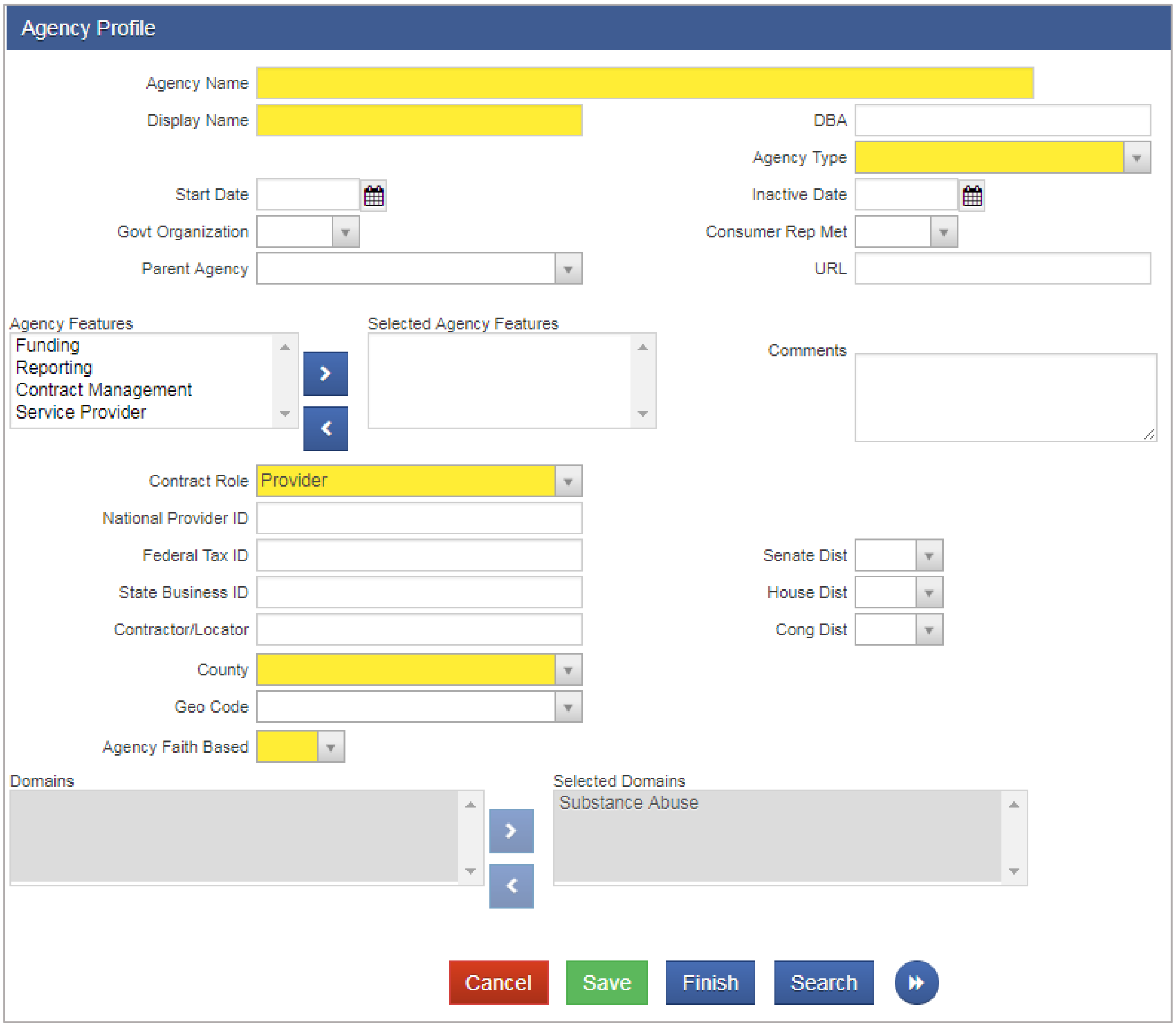


Figure 1-1: Agency Profile screen

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.

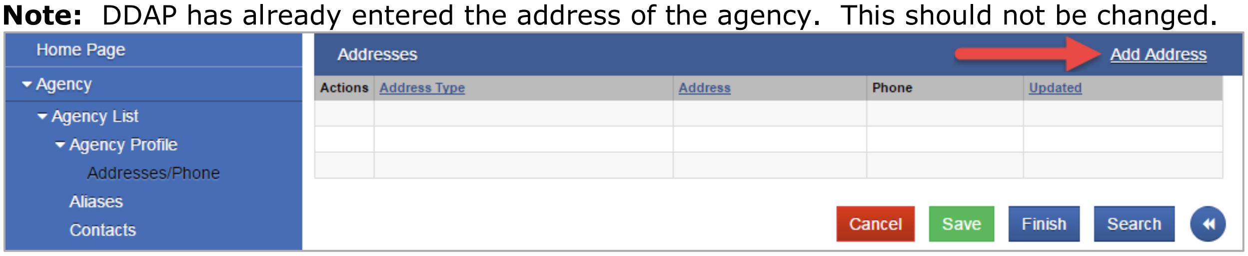


Figure 1-2: Address/Phone List screen

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

Table 1-2: Address Information Fields

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

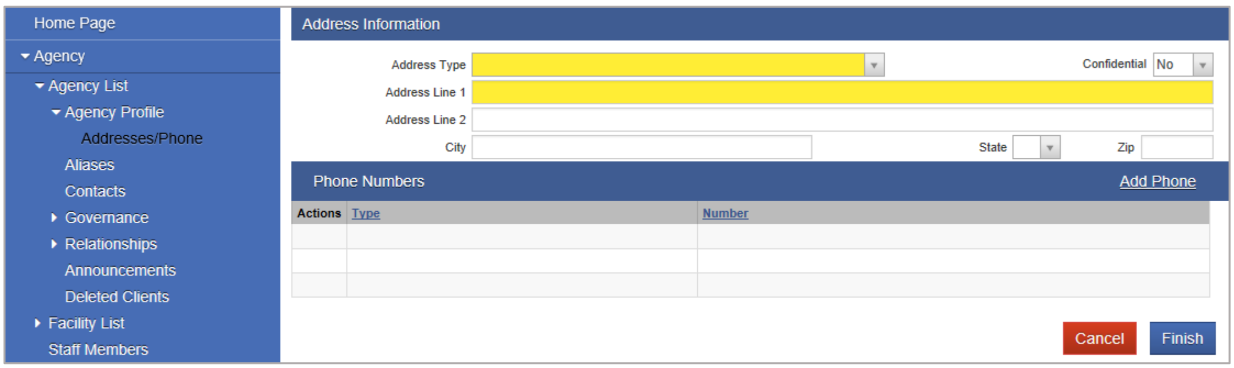


Figure 1-3: Address Information screen

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

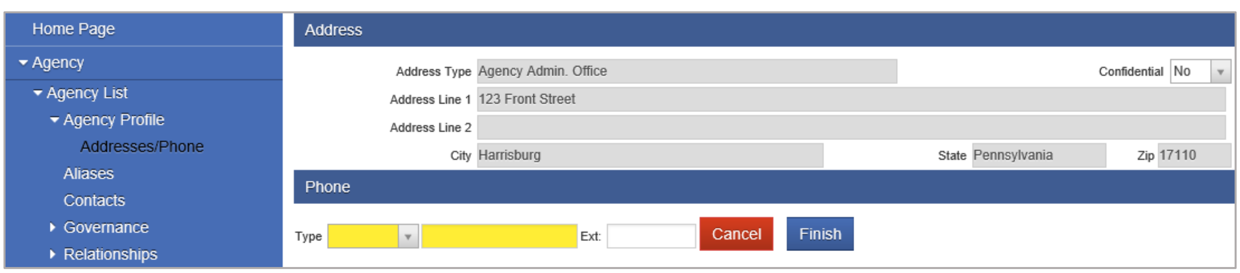


Figure 1-4: Add Phone Number

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

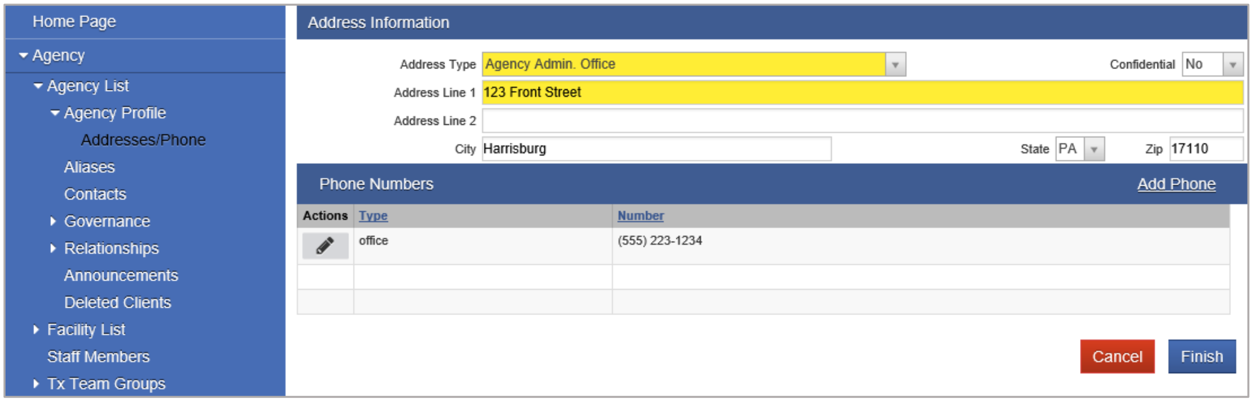


Figure 1-5: Address Information screen

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

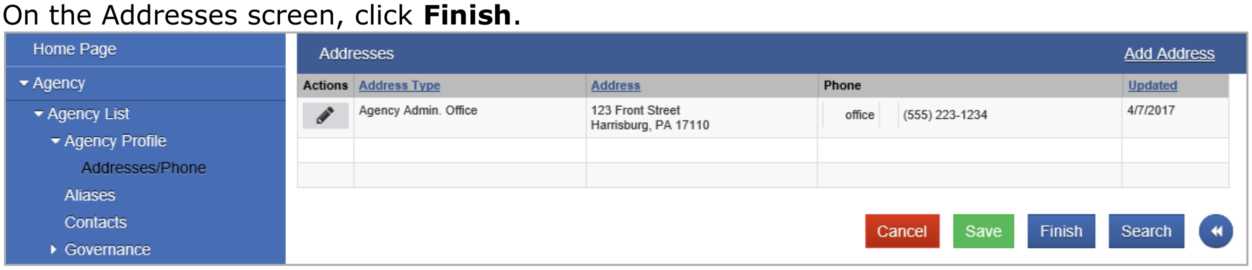


Figure 1-6: Address/Phone screen

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.

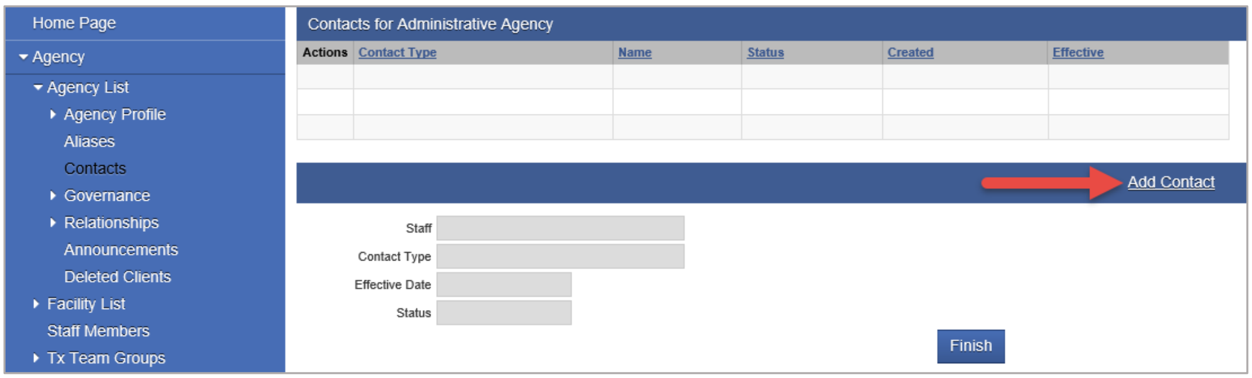


Figure 1-7: Contacts for Agency screen

3. Complete the required fields.

Table 1-3: Agency Contact fields

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

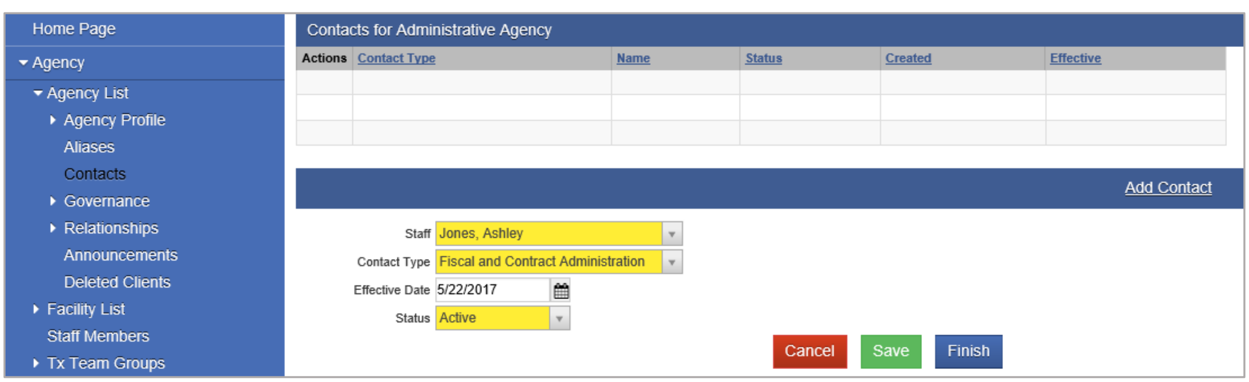


Figure 1-8: Add Agency Contact screen

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.

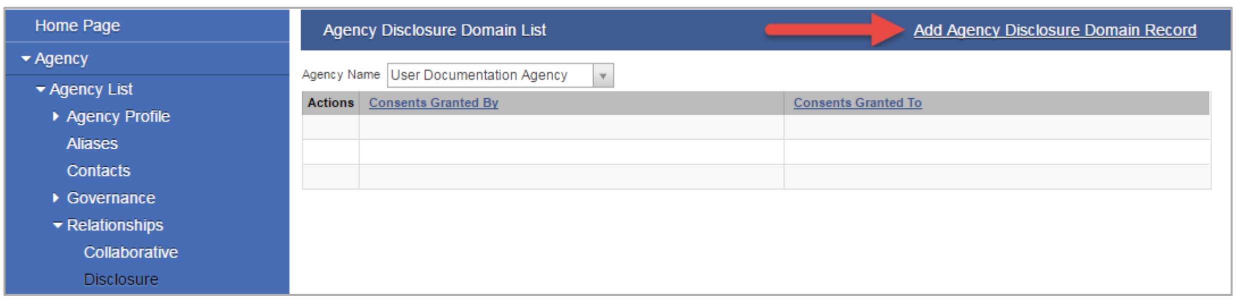


Figure 1-9: Agency Disclosure Domain List screen

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

Table 1-4: Agency Disclosure Domain fields

Field	Description
Disclosing Agency	Select the name of your agency from the drop-down menu.
Receiving Agency	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.
Receiving Entity (Non System Agency)	If this disclosure agreement applies to an agency outside of WITS, type that agency's name in this field.
Global Policy? (Available To All Agencies)	Select Yes or No.
Always Verify Consent	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
Expiration Type and **+ Days**	Select either "Discharge (UD)" or "Date Signed (DS)", then when the yellow field appears, enter the number of days the consent will expire.
Consent Options	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.

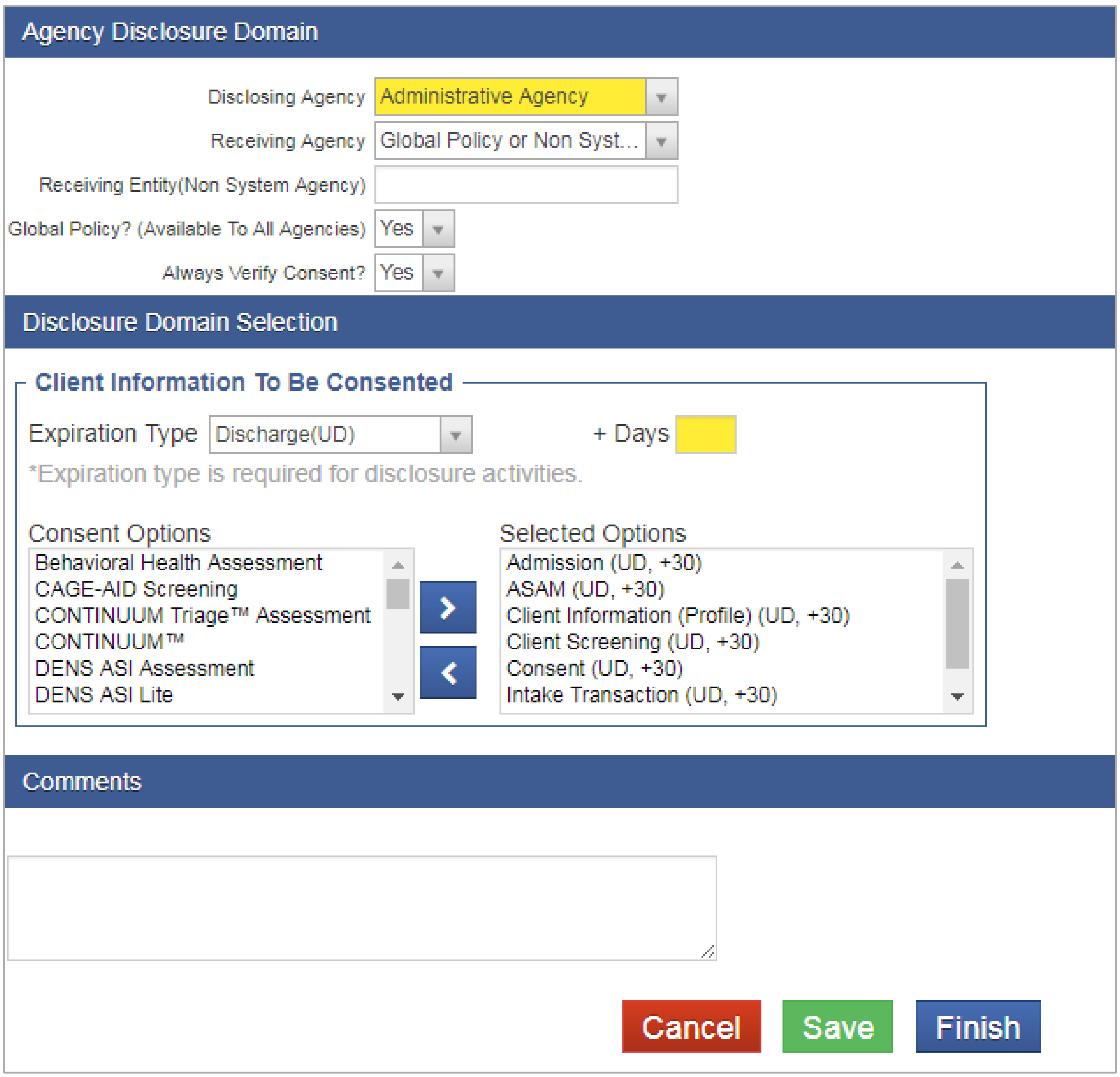


Figure 1-10: Disclosure screen

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.

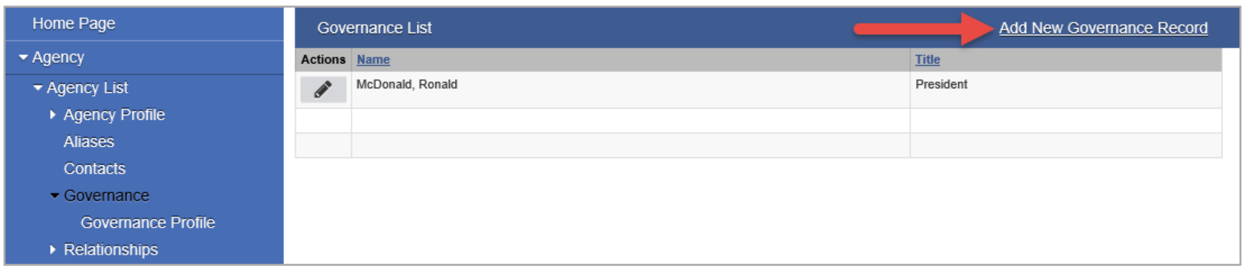


Figure 1-11: Add New Governance Record

3. Complete the required fields.

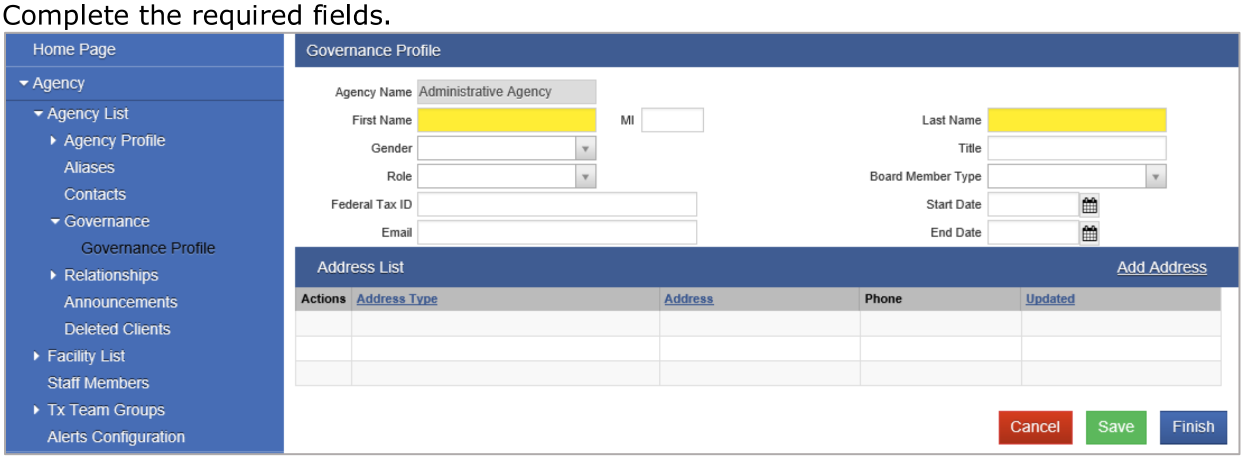


Figure 1-12: Governance Profile

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.

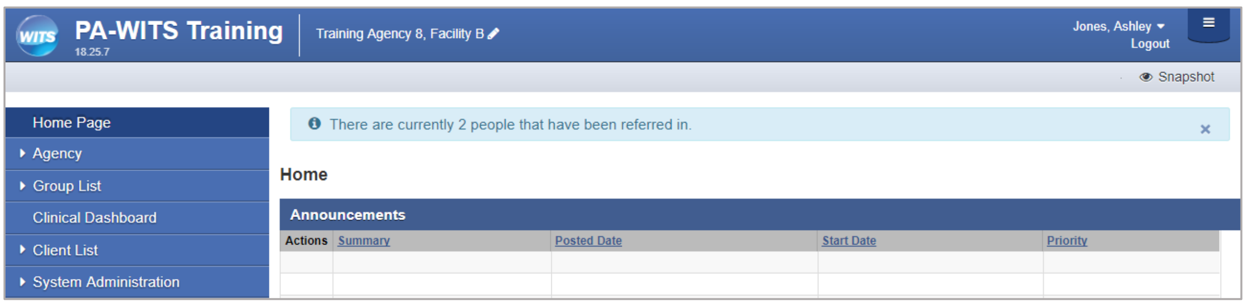


Figure 1-13: Home Page with "referred in" notification

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.

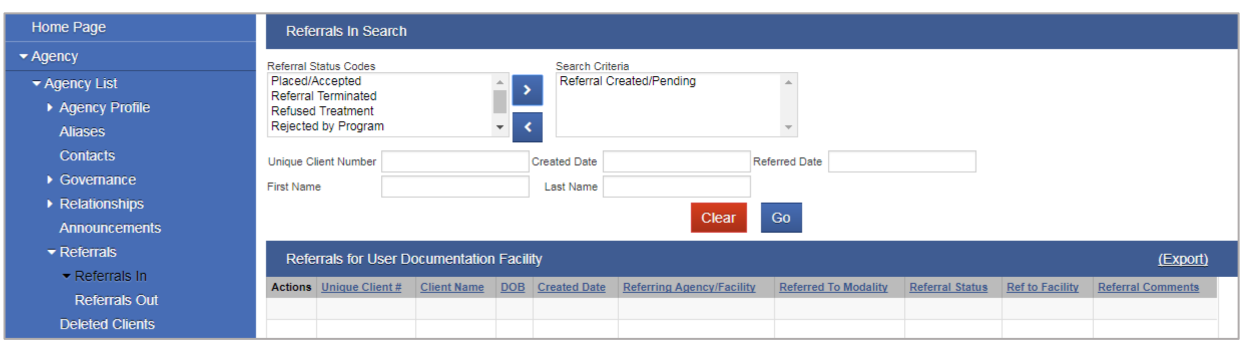


Figure 1-14: Referrals In Search screen

4. 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**.

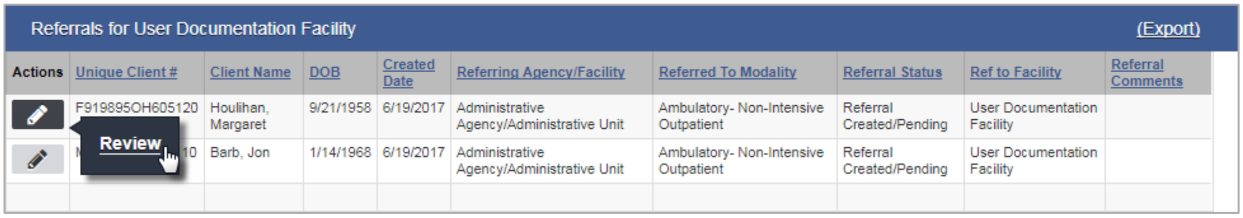


Figure 1-15: Referrals Search Results, Review link

5. 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.

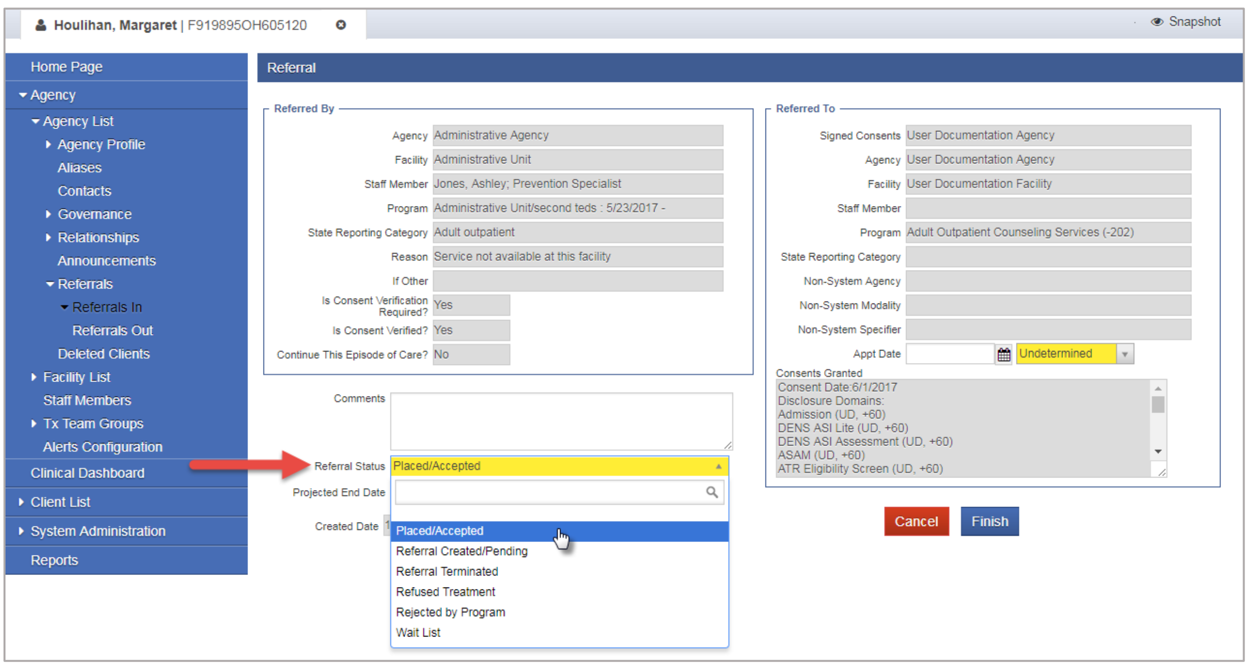


Figure 1-16: Referral screen, Referral Status field

6. (Optional) Next, fill in the **Appointment Date (Appt Date)** and use the drop-down box to provide any additional information about the appointment.

7. 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.

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.

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:"

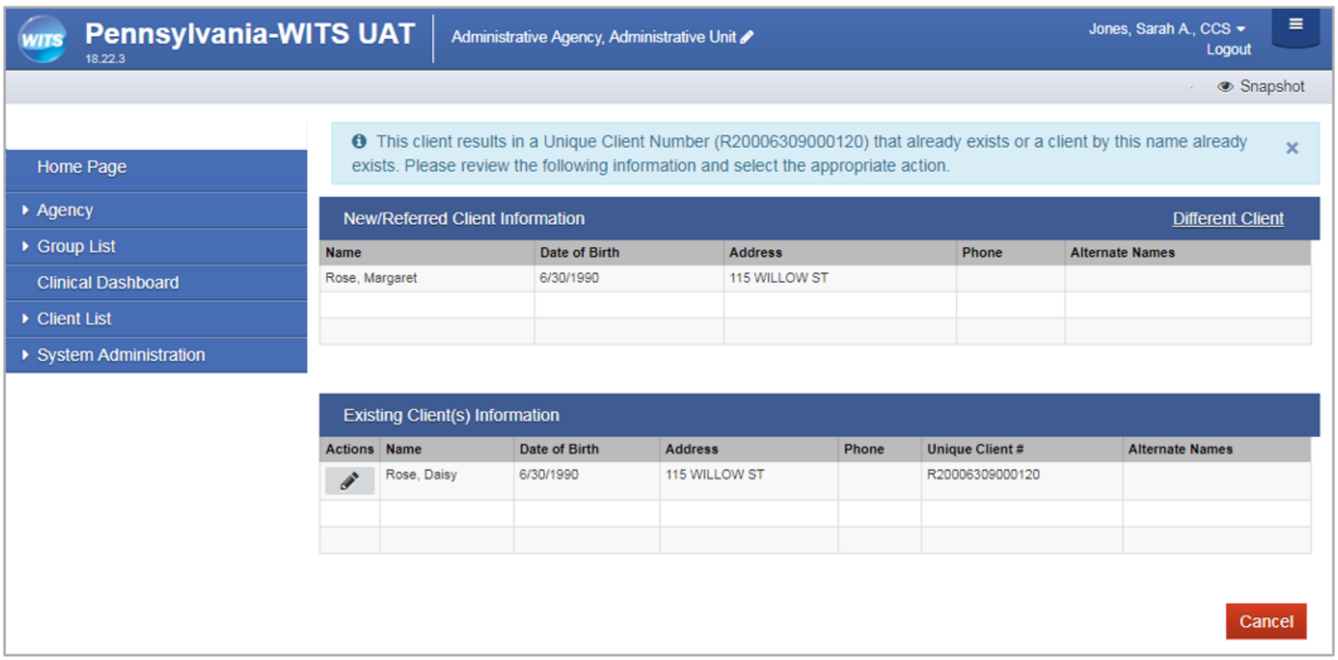


Figure 1-17: New/Referred Client Information with Existing Client Information

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)

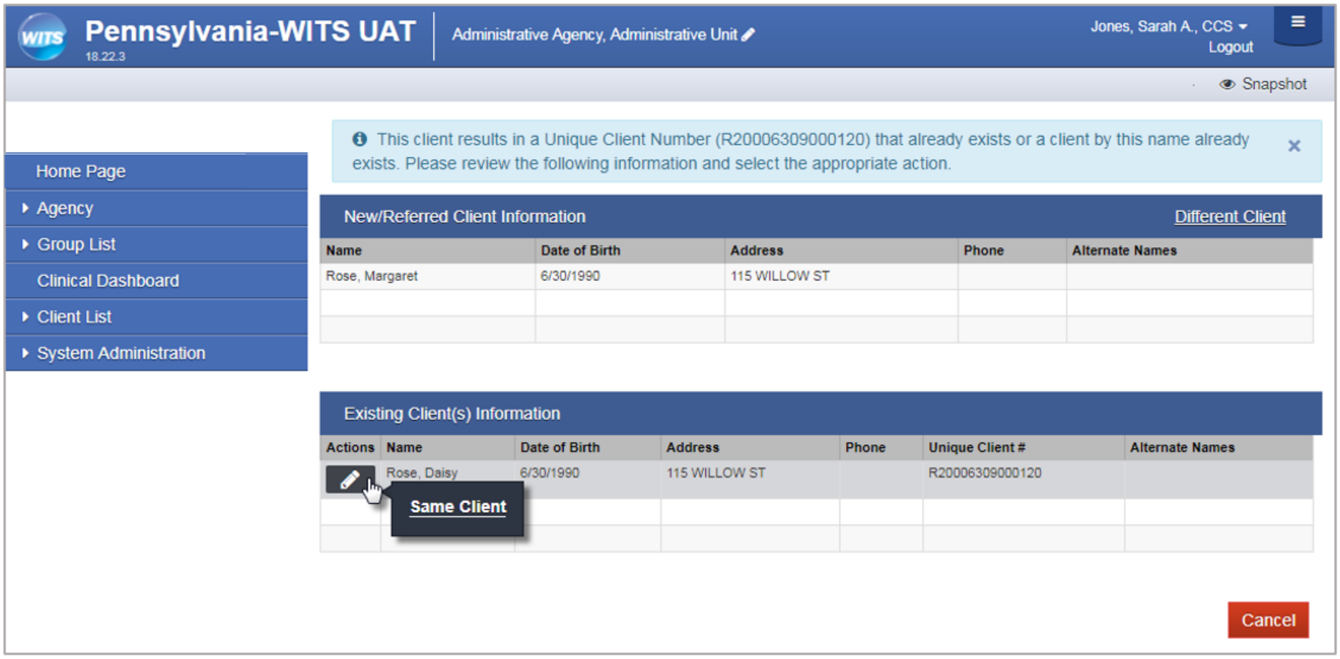


Figure 1-18: Existing Client Information, Same Client link

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.

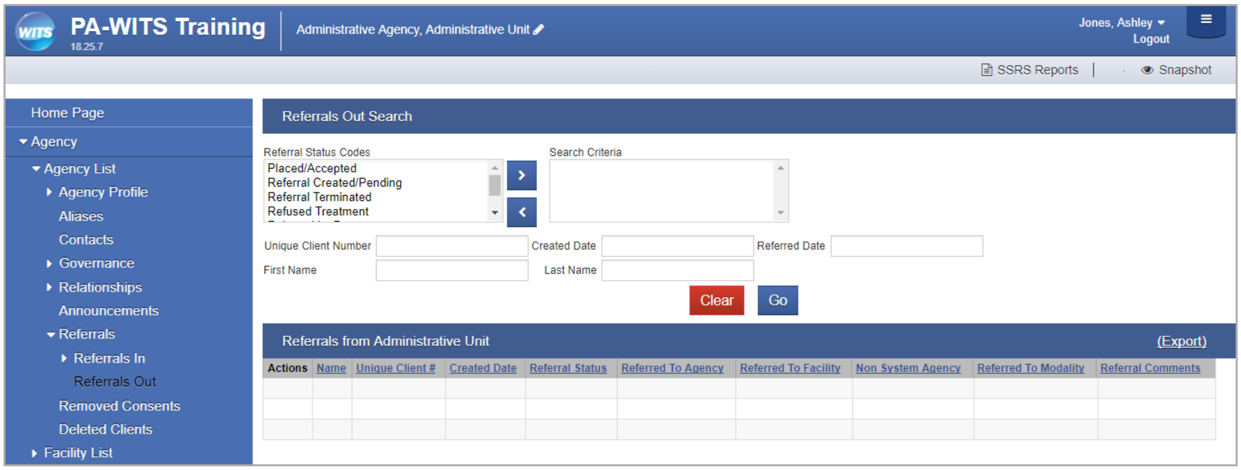


Figure 1-19: Referrals Out screen

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.

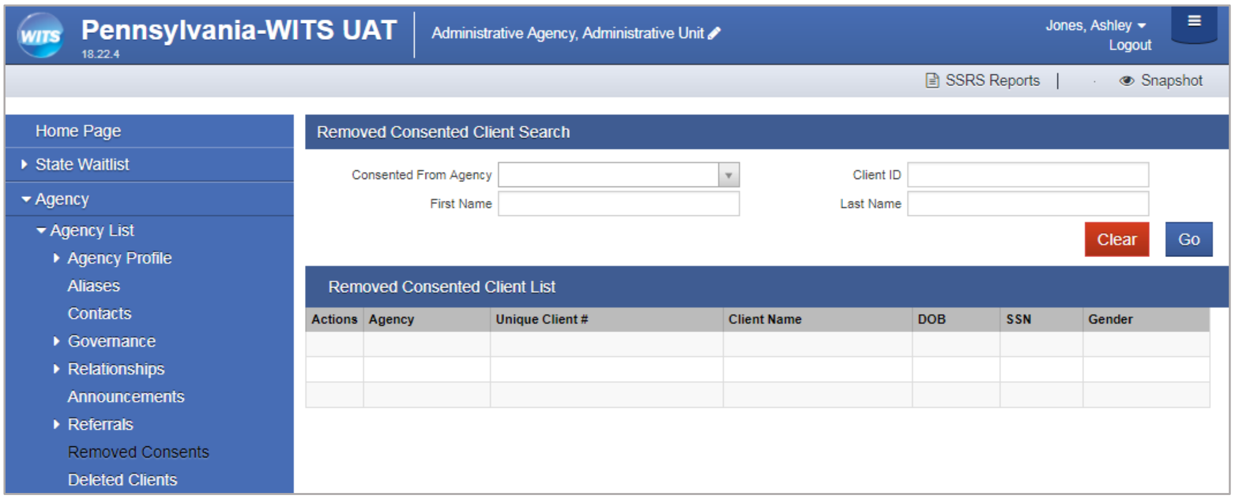


Figure 1-20: Removed Consents screen

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.

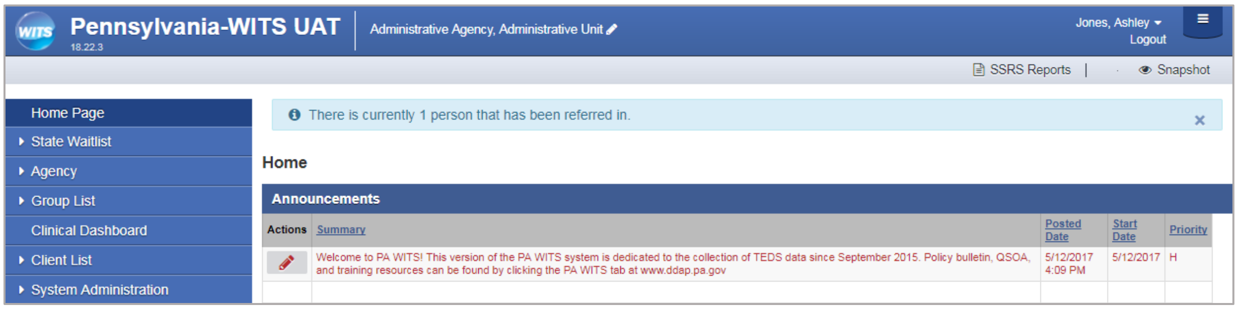


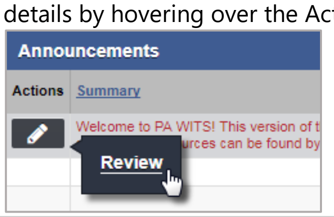
Figure 1-21: Home Page with Announcement in red text

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

Field	Description
Priority	Select from the drop-down field. A Priority of "High" will display the announcement in red.
Start Date	Enter a start date for the announcement.
End Date	Enter an end date for the announcement.
Sort Order	(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.

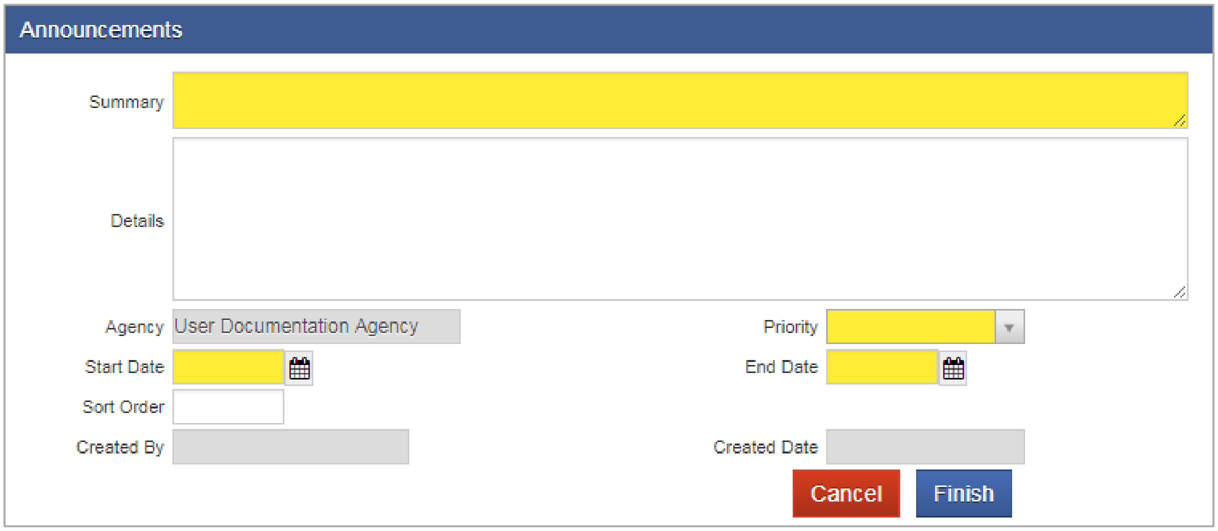


Figure 1-23: Announcements screen

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

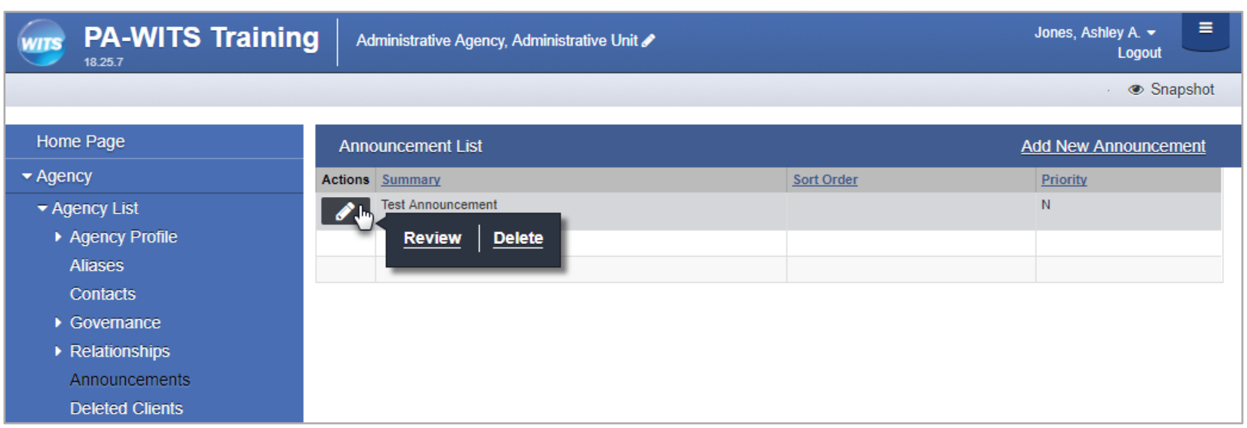


Figure 1-24: Announcement List screen, Actions links

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.

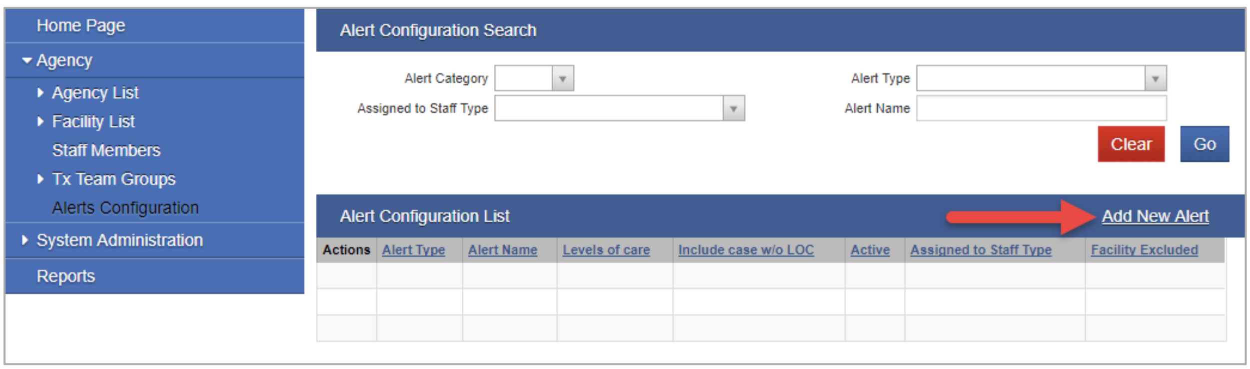


Figure 1-25: Alerts Configuration Search screen

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
Alert Name	Type a name for this alert.
Alert Type	Select an Alert Type from the drop-down menu; WITS will fill in the Alert Category, Trigger Point and Description.
What message should appear to users?	Type detailed information for this alert.
When is the next activity due (days after the trigger point)?	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?
How many days prior to the due date should this alert show up?	If the "Initial Treatment Plan" is due 30 days after admission, when should people be notified? 10 days prior?
Which staff should receive the message?*	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.
Should message turn red when overdue?	Select Yes or No.

Field	Description
Include cases where no level of care indicated	Select Yes or No.
Facility	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.
Alert should stop being displayed this many days after it is generated	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**.

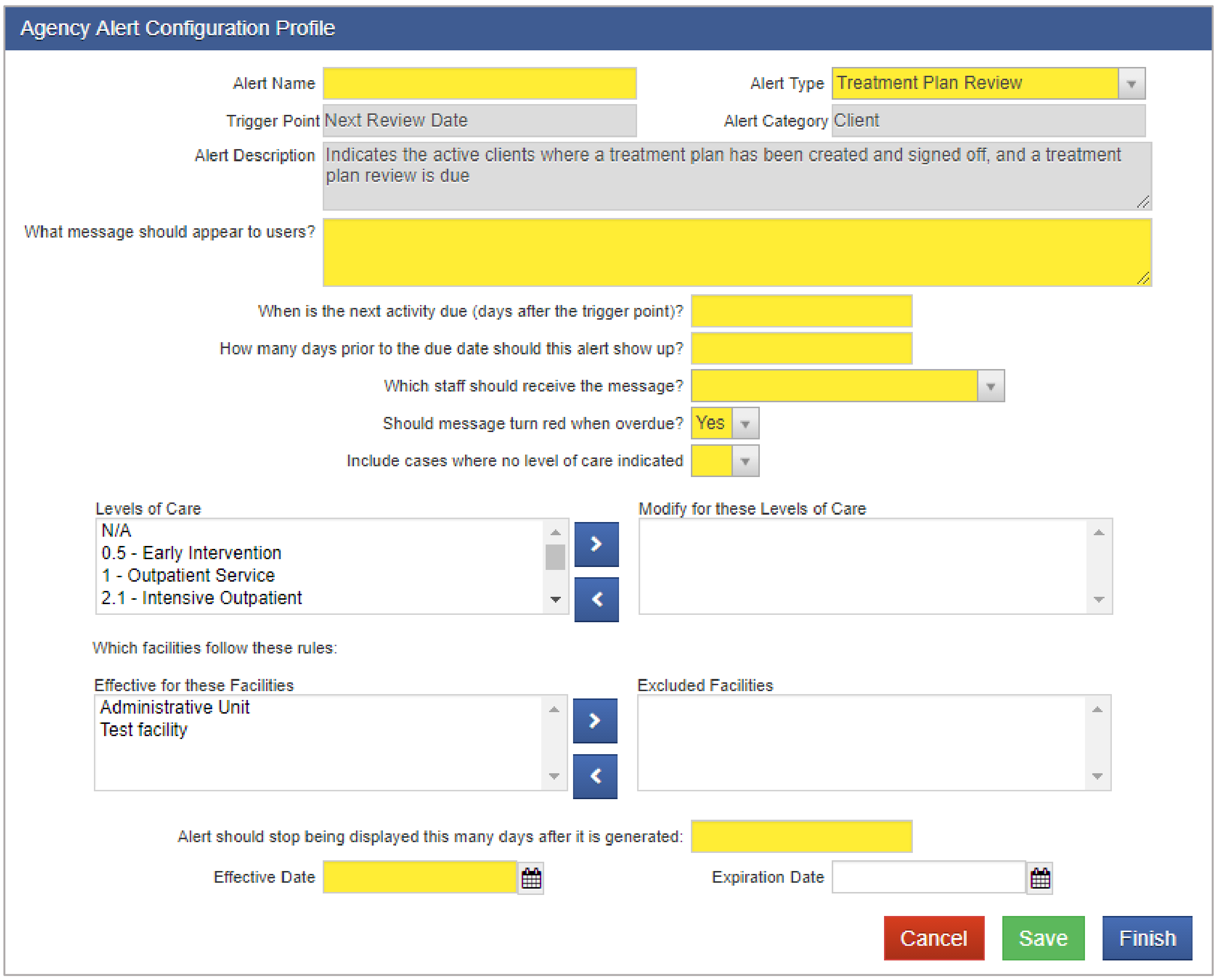


Figure 1-26: Agency Alert Configuration Profile

*Which staff should receive this message?

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

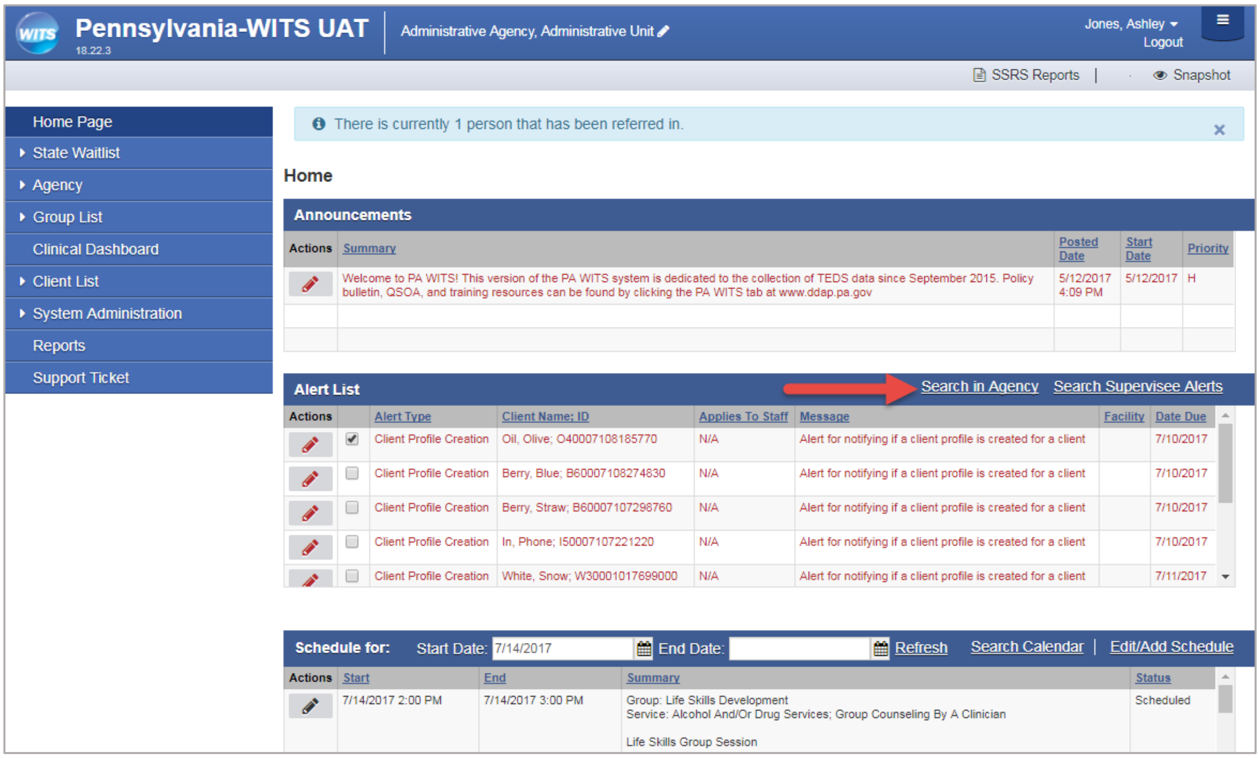


Figure 1-27: Home Page Alert List, Search in Agency

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.

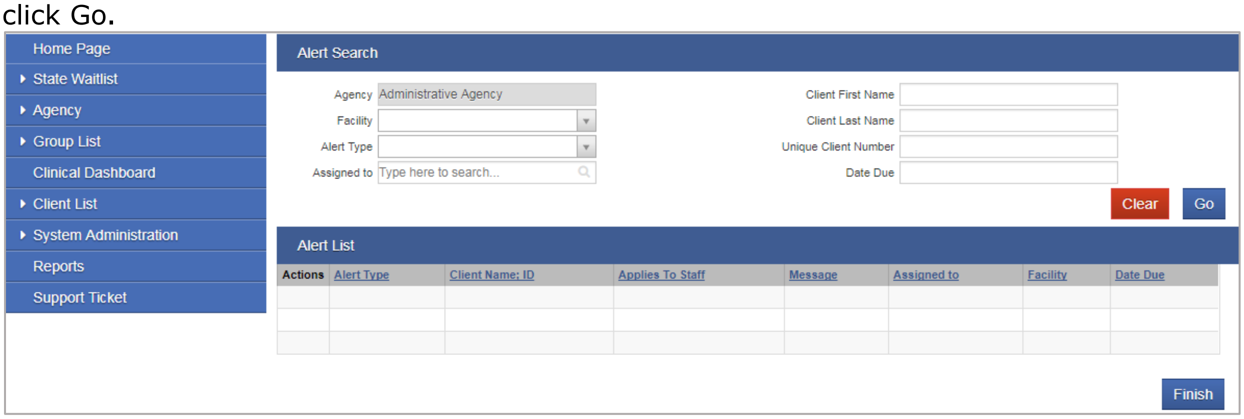


Figure 1-28: Alert Search/List screen

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).

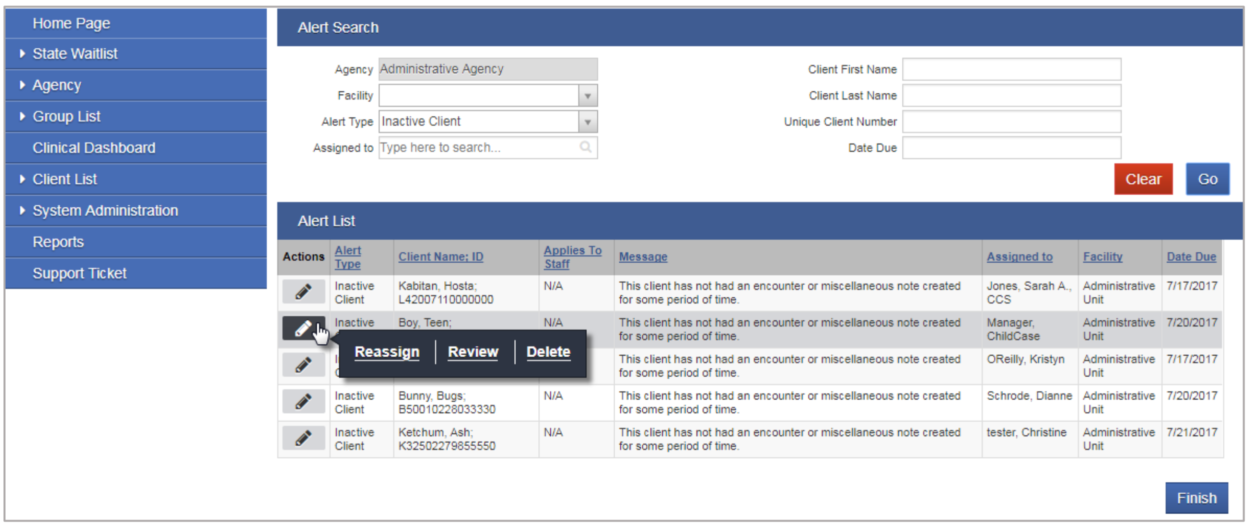


Figure 1-29: Alert List, Action items

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.

Figure 1-30: Reassign Agency Alert

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

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.

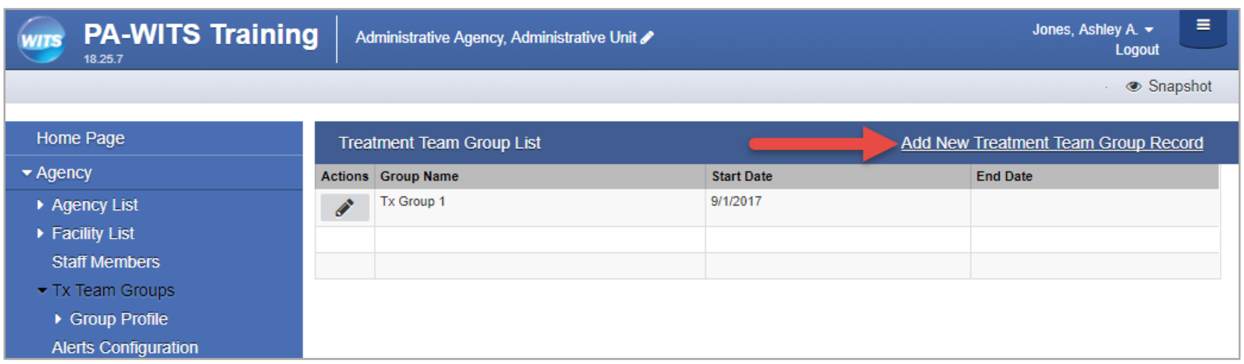


Figure 1-31: Treatment Team Group List screen

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

Figure 1-32: Treatment Team Group Profile

4. Click the Add Staff to Group link.

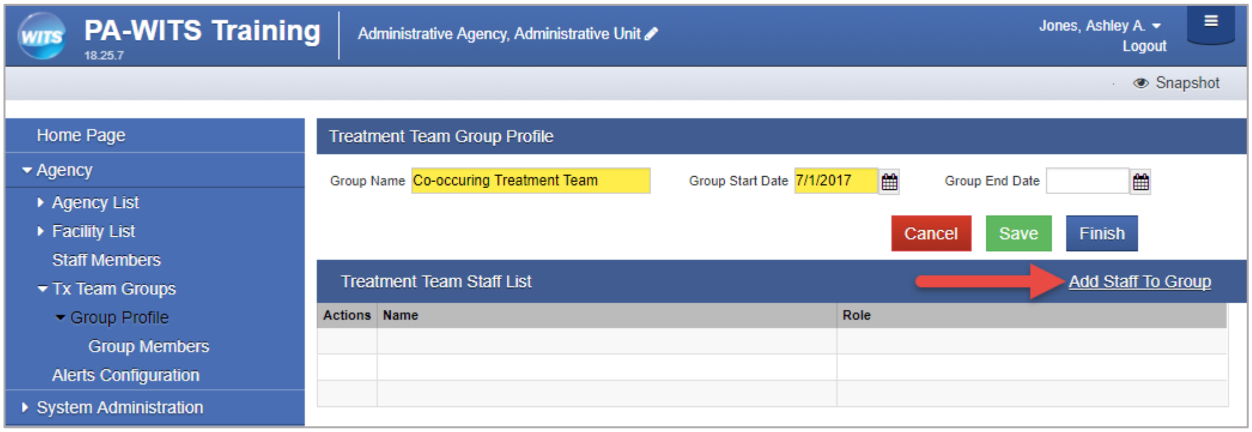


Figure 1-33: Treatment Team Group Profile, Add Staff to Group link

5. 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
Name	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.
Role	Select the staff member's Role within this Treatment Team Group.

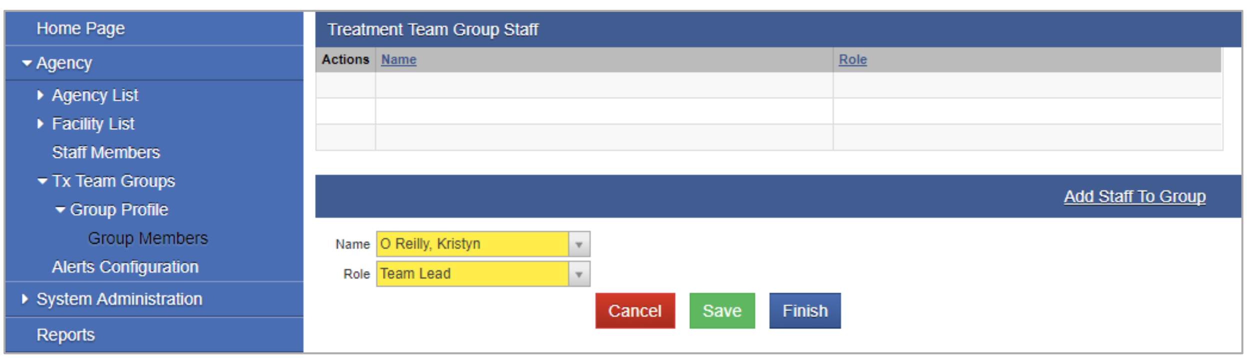


Figure 1-34: Treatment Team Group Staff list

6. Click **Save**. Add additional staff members as needed, and then click **Finish**.

7. 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.

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

2. Click Add New Facility Record.

Figure 2-1: Facility List screen

3. On the **Facility Profile** screen, enter the required information:

Table 2-1. Facility Profile Fields

Field Name	Description
Facility Name	Type the facility's name.
Display Name	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.
I-BHS #	Pulled on the NOMS extract. This is also known as the Facility ID number or License Number.
Service Location	Defaulted as the location when creating encounters
Operations Start/End Date	Optional/Informational
Reports Start/End Date	Optional/Informational
Contact	Optional/Informational
Alternate Contact	Optional/Informational
Facility ID	Optional/Informational

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

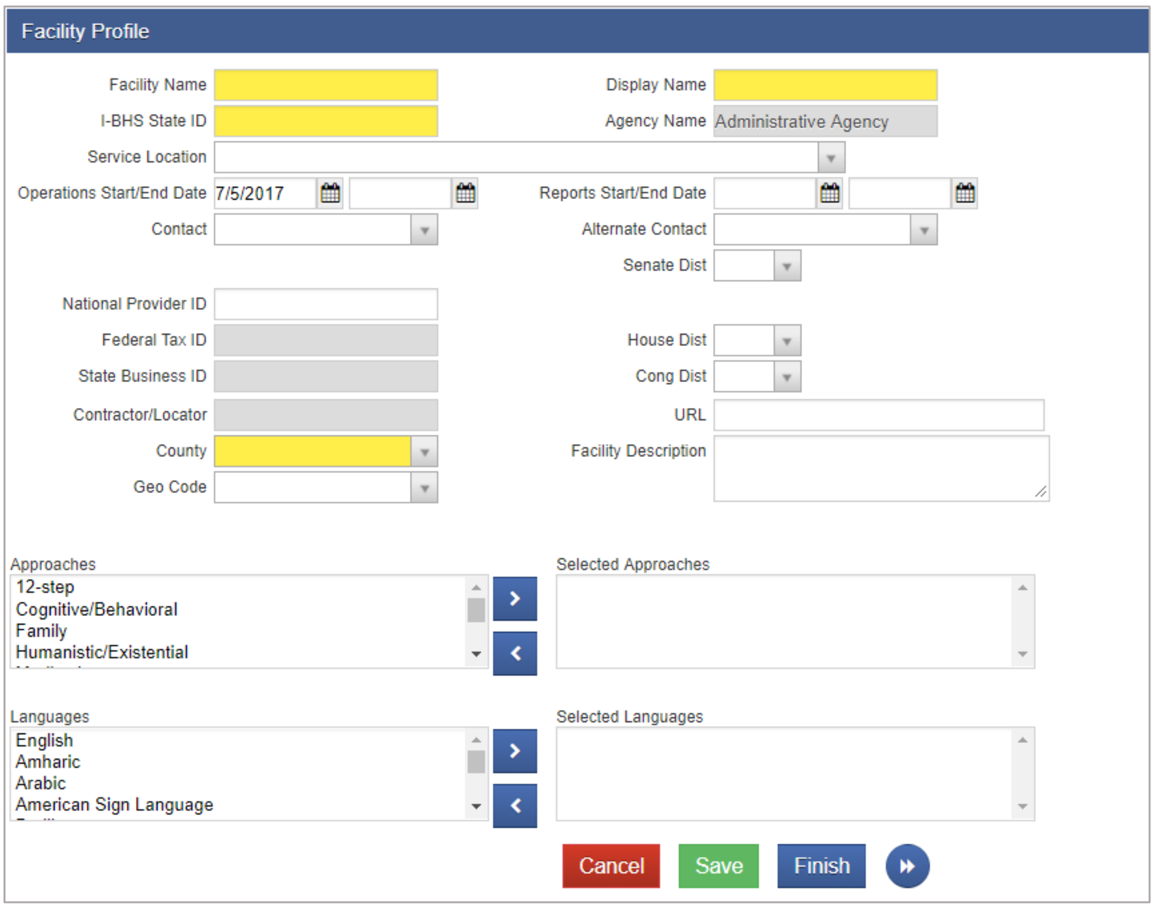


Figure 2-2: Facility Profile screen

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

6. Click Add Address.

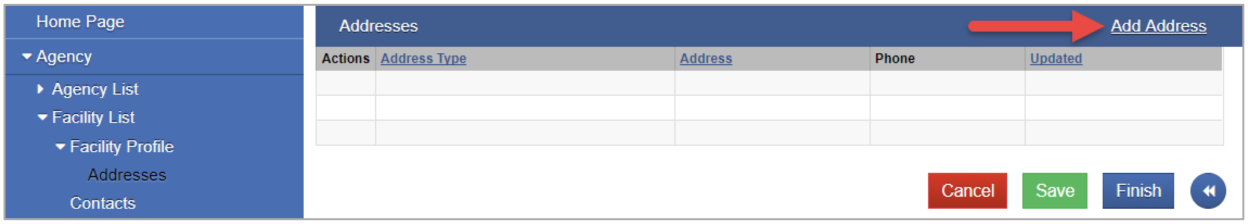


Figure 2-3: Add Facility Address

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

Table 2-2: Address Information fields

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

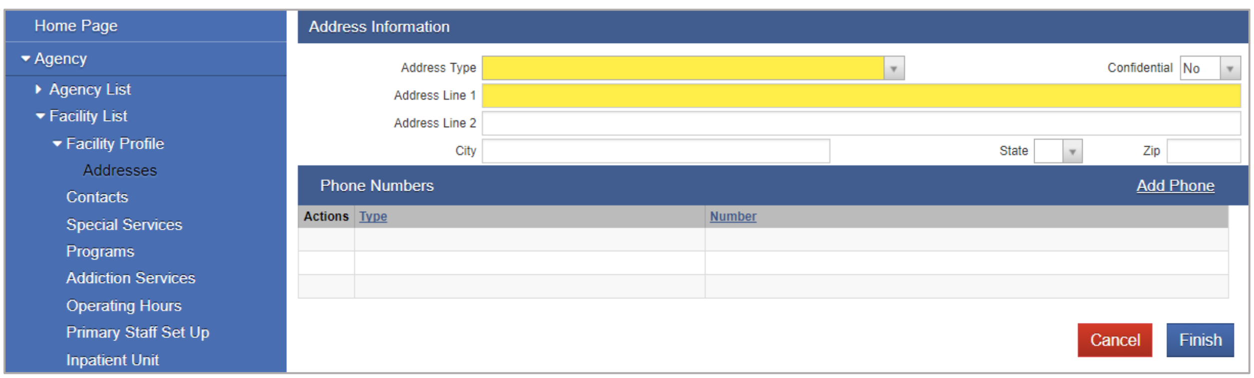


Figure 2-4: Facility Address screen

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

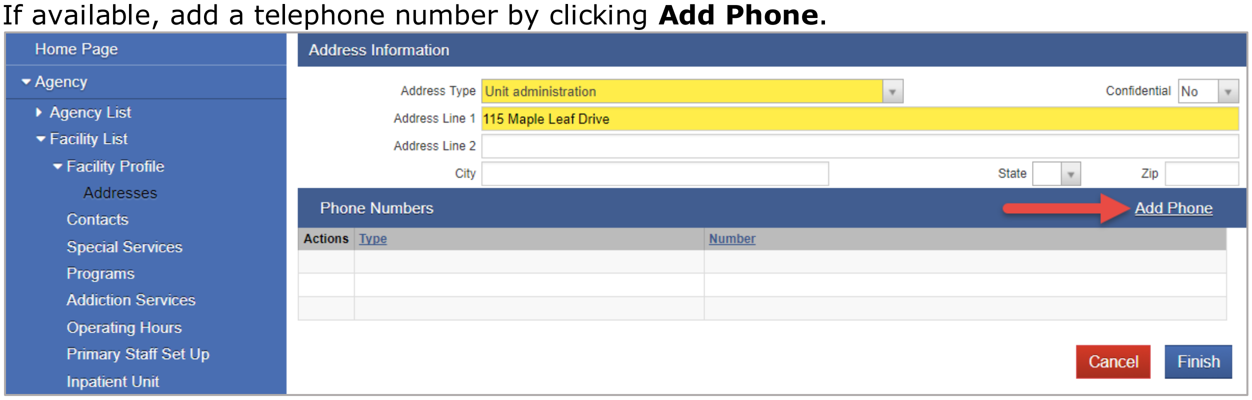


Figure 2-5: Facility Address screen, Add Phone link

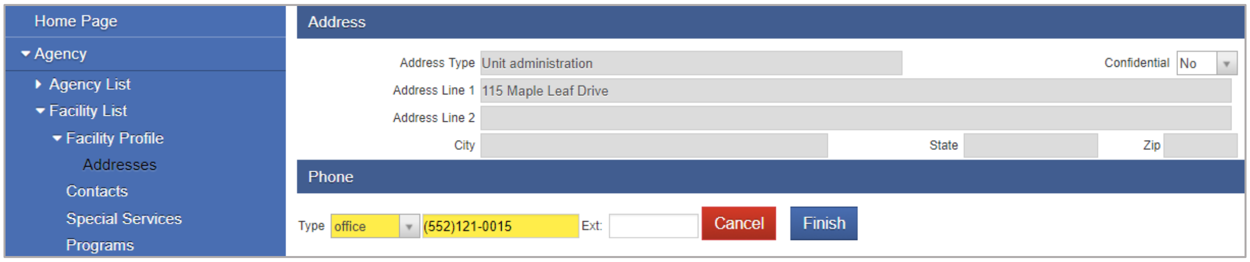


Figure 2-6: Facility Address screen, Add Phone Number

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

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

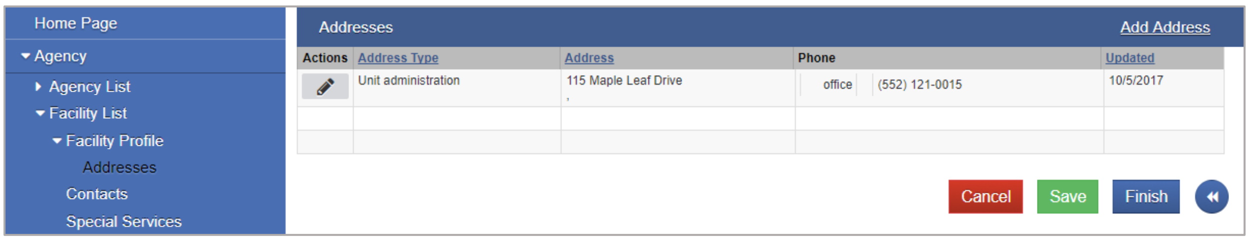


Figure 2-7: Facility Address screen with address and phone number added

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.

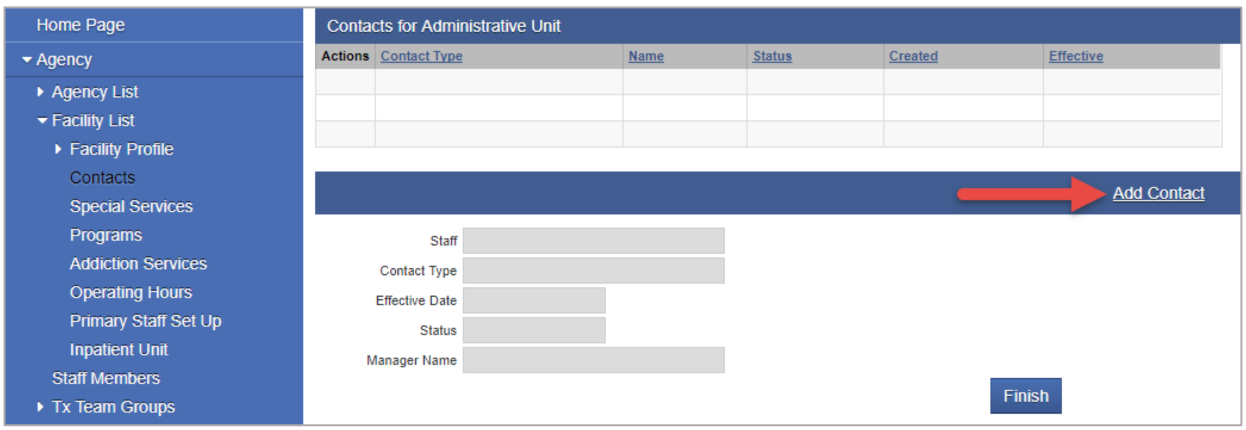


Figure 2-8: Facility Contacts screen

2. Complete the fields.

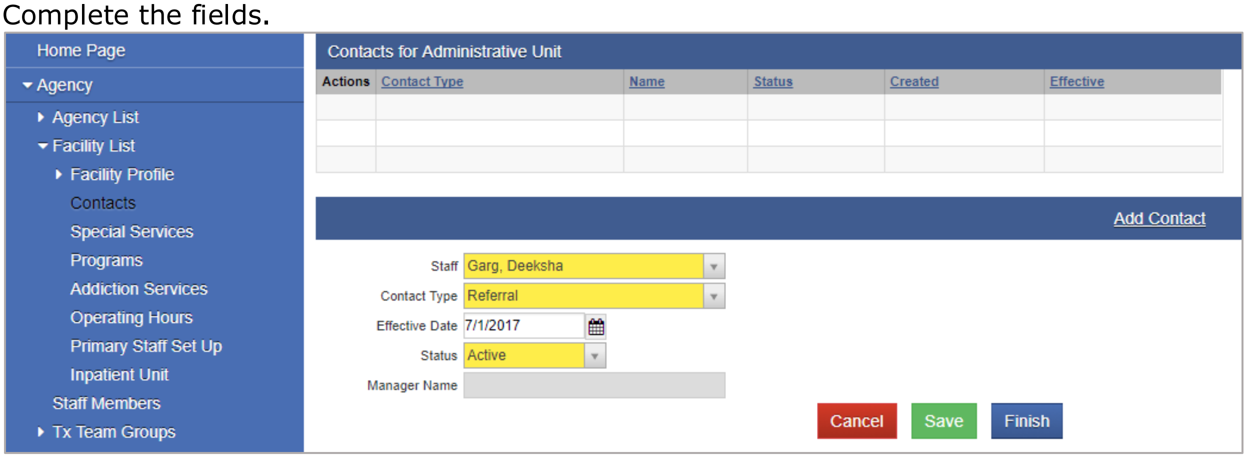


Figure 2-9: Facility Contacts screen, add new contact

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.

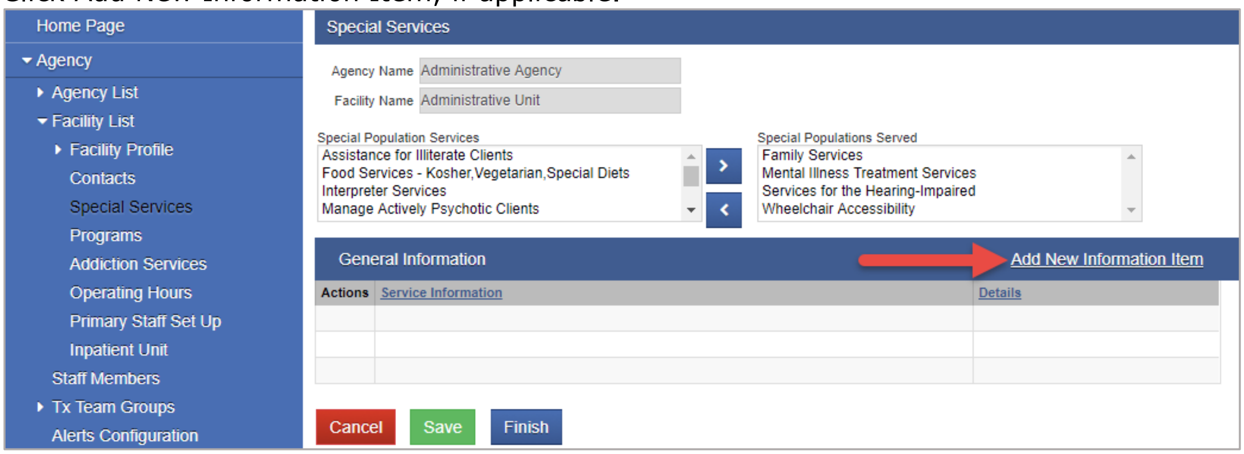
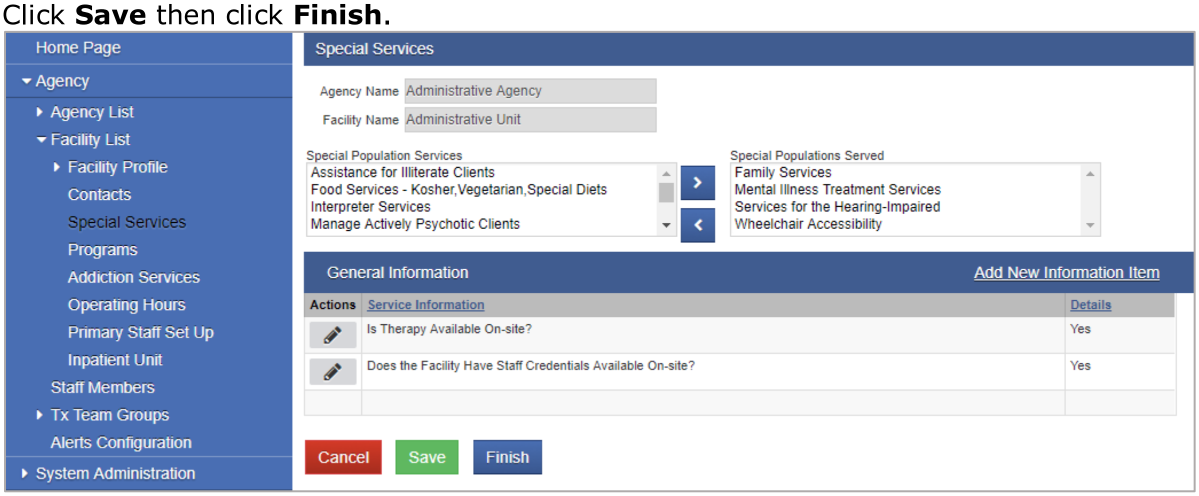


Figure 2-10: Facility Special Services screen, Add New Information Item link

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**.



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.

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

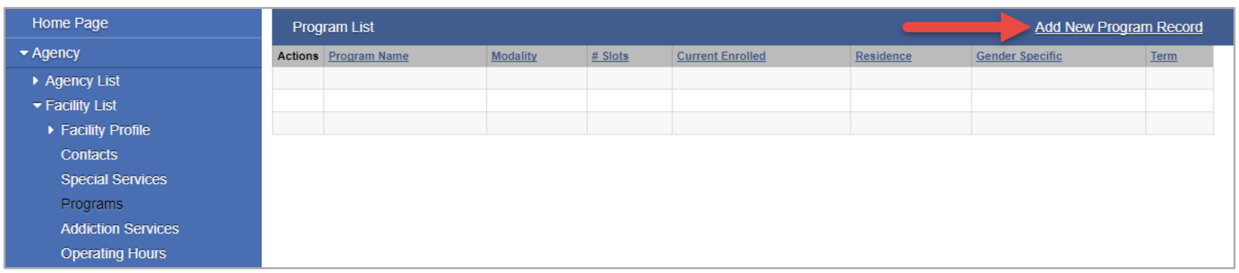


Figure 2-12: Program List screen

3. 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
Program Name	Program may be titled anything you or the provider desires.
Display Name	Type the program's display name. Note: this field is limited to 15 characters.
Domain	Select the domain from the drop-down list.
Modality	For federal reporting, the Modality will set the TEDS reporting code behind the scenes.
Current Enrolled	Read-only field displaying the number of clients currently enrolled in the program.
Program Type	Read-only field.
ASAM Level of Care	For instances that follow ASAM criteria, it is important that the Level of Care be set according to the appropriate ASAM Level of Care.
PCPC Level of Care	For instances that follow PCPC, it is important that the Level of Care be set according to the appropriate PCPC Level of Care.
Residence	Select the location from the drop-down list. (County code table)
Report to State	Select Yes/No.
Report to TEDS	Select Yes/No.
Age Group	Options include: < 12, teens (12-19), 20-30, 31-40, 41-50, 51-60, > 60, Youth, Adult, or All Age Groups.
Waitlist Availability Type	Options include: None, Cross-agency, or Local only.
Gender Specific	Options include: Female, Male, or Not Specific.
Program Start Date	Enter the program's start date.
Program End Date	Add an end date when the program is no longer available.

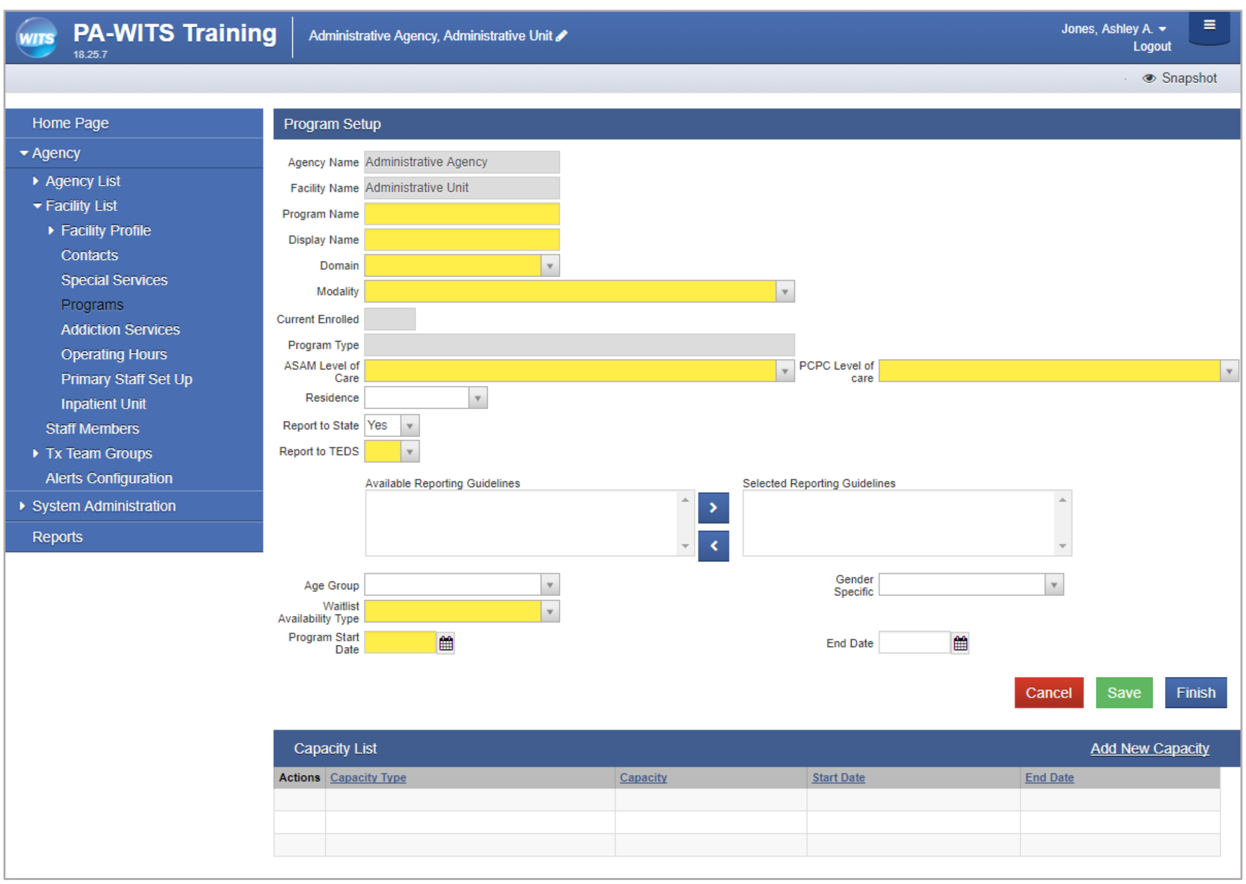


Figure 2-13: Program Setup fields

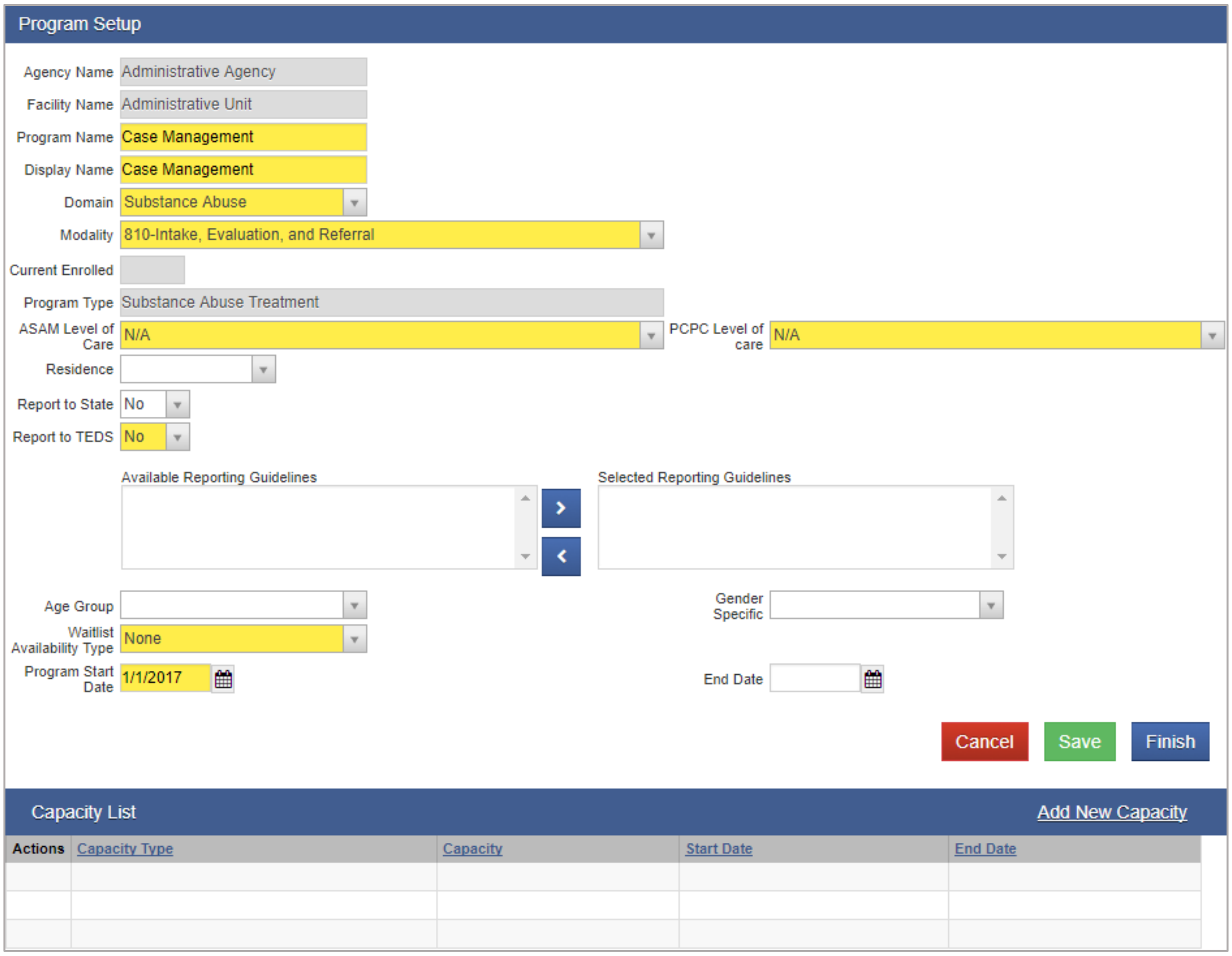
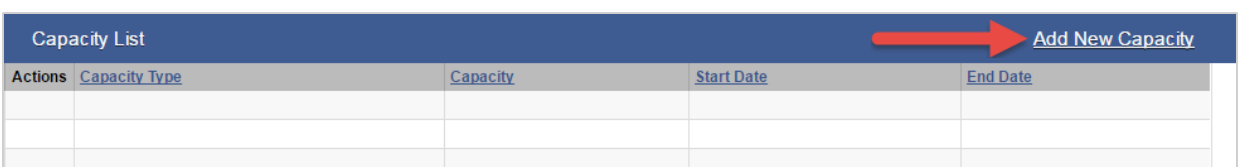


Figure 2-14: Program Setup fields, completed

4. Click **Save**.

5. Click Add New Capacity.



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

Table 2-4: Program Capacity Details fields

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

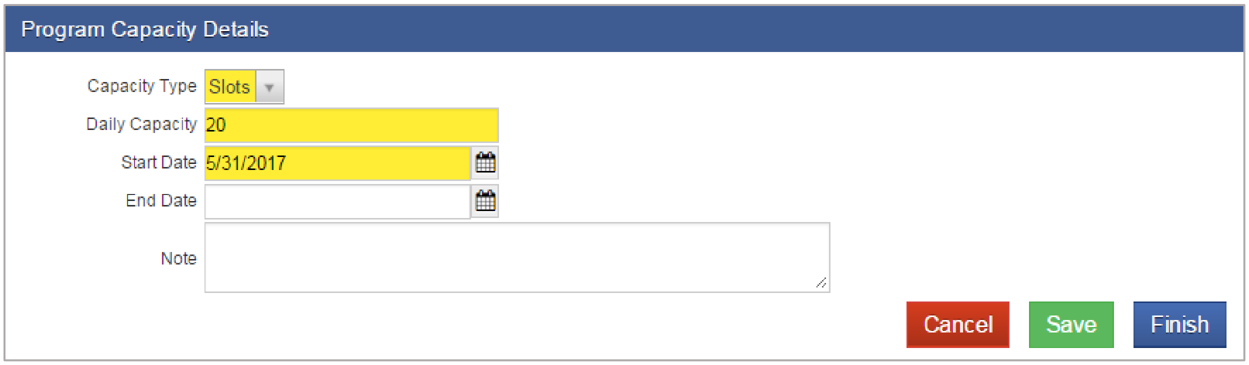


Figure 2-15: Program Capacity Details screen

7. Click **Finish**.

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

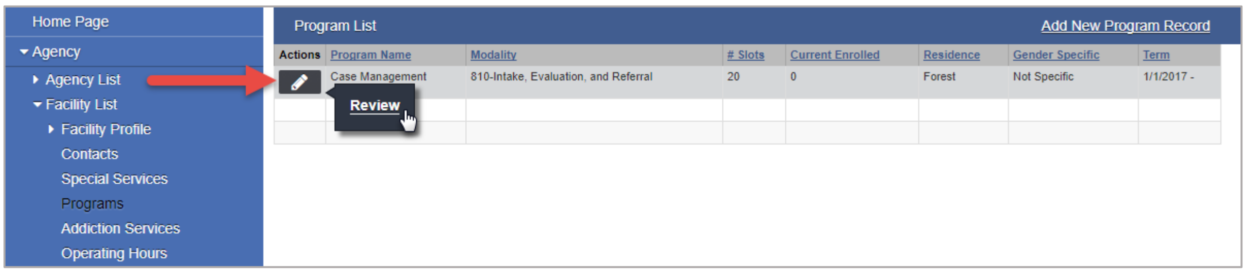


Figure 2-16: Facility Program List screen, Review Action link

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**.

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.

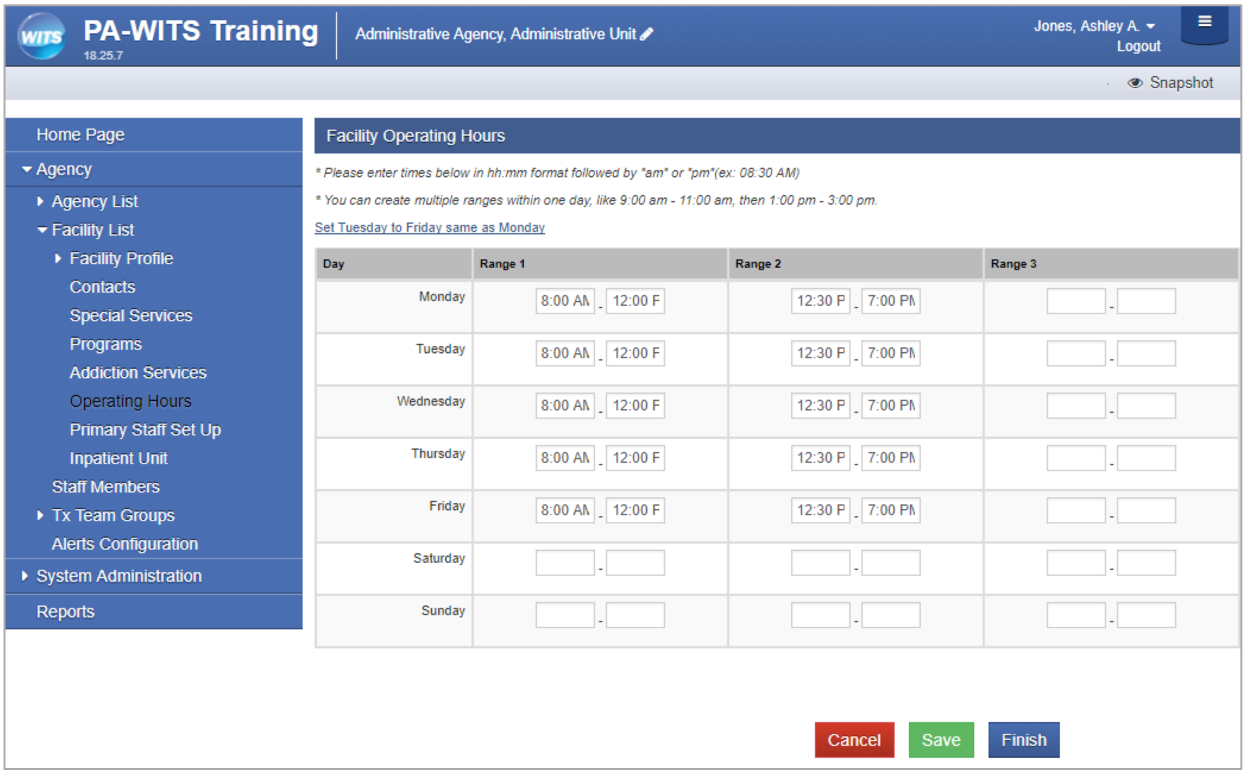


Figure 2-18: Facility Operating Hours

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.

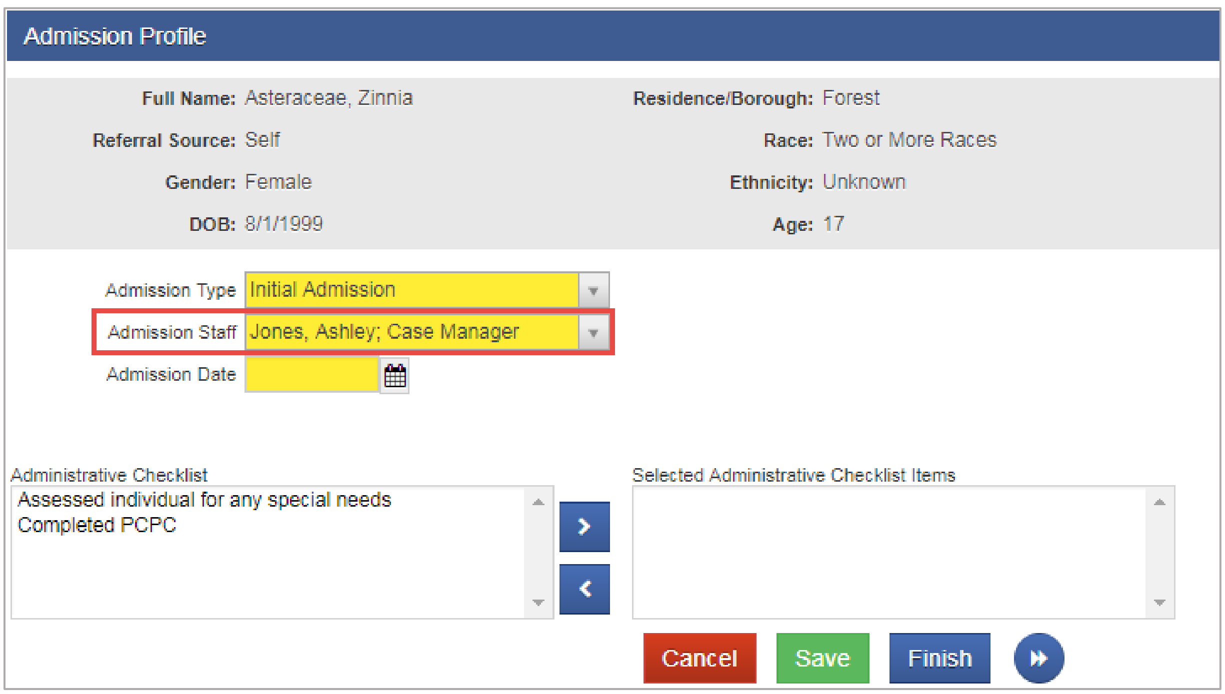


Figure 2-19: Admission Profile screen, Admitted by staff member

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

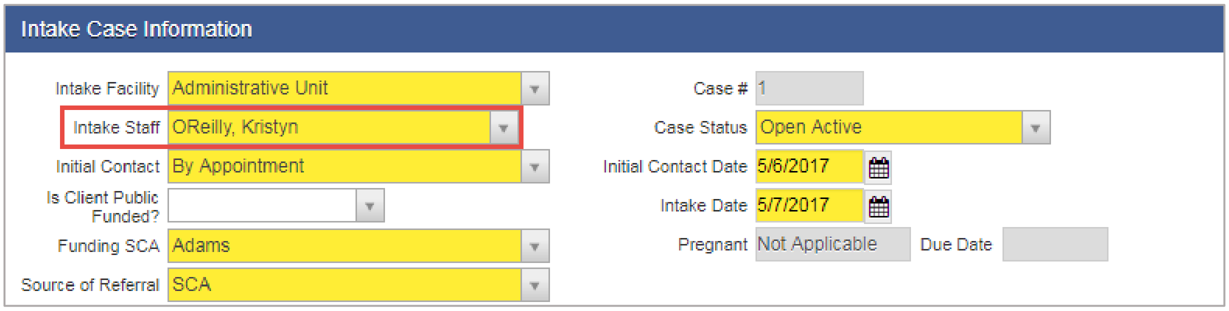


Figure 2-20: Intake Case Information screen, Case assigned to staff member

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

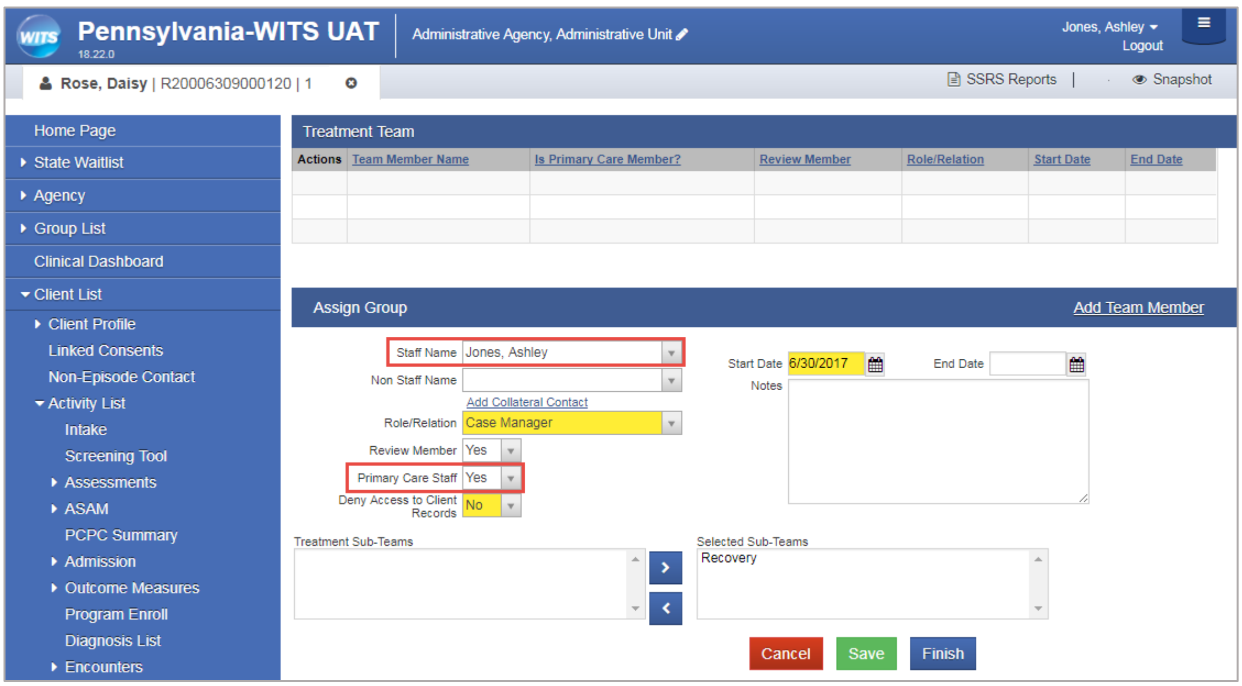


Figure 2-21: Treatment Team screen, Primary Care Staff member

- **Treatment Team Case Manager**: staff person on the client's treatment team with the relationship of "Case Manager".

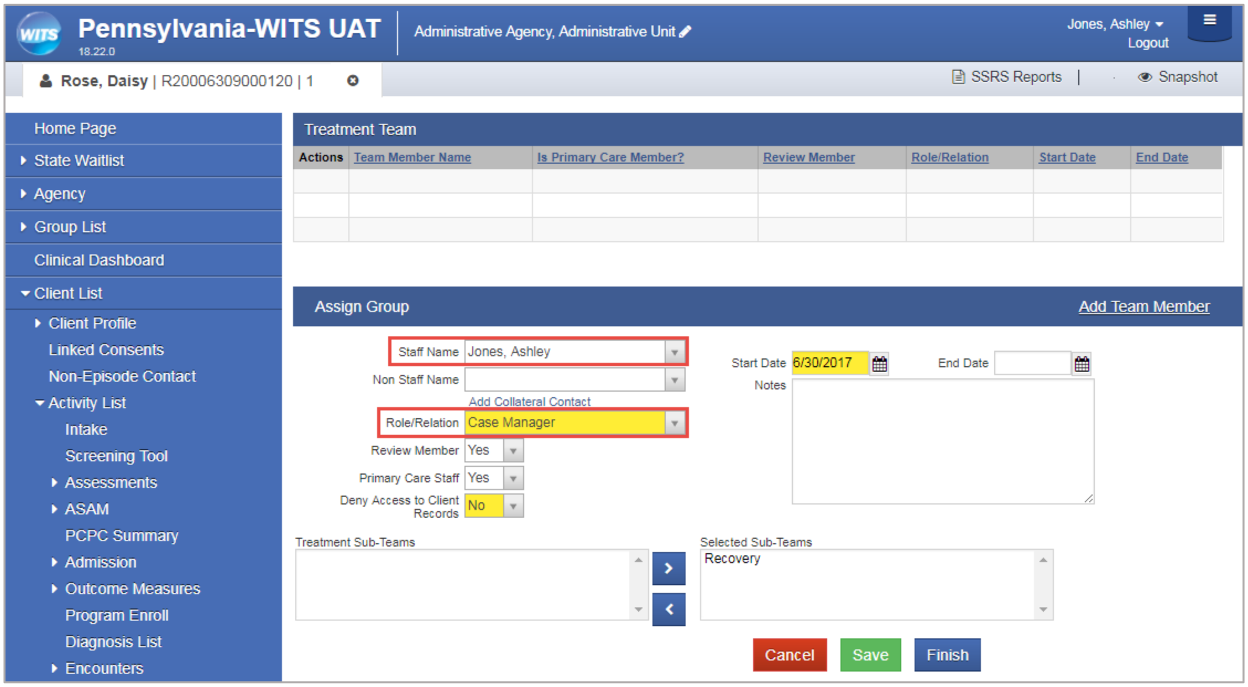


Figure 2-22: Treatment Team screen, Case Manager Role/Relation

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

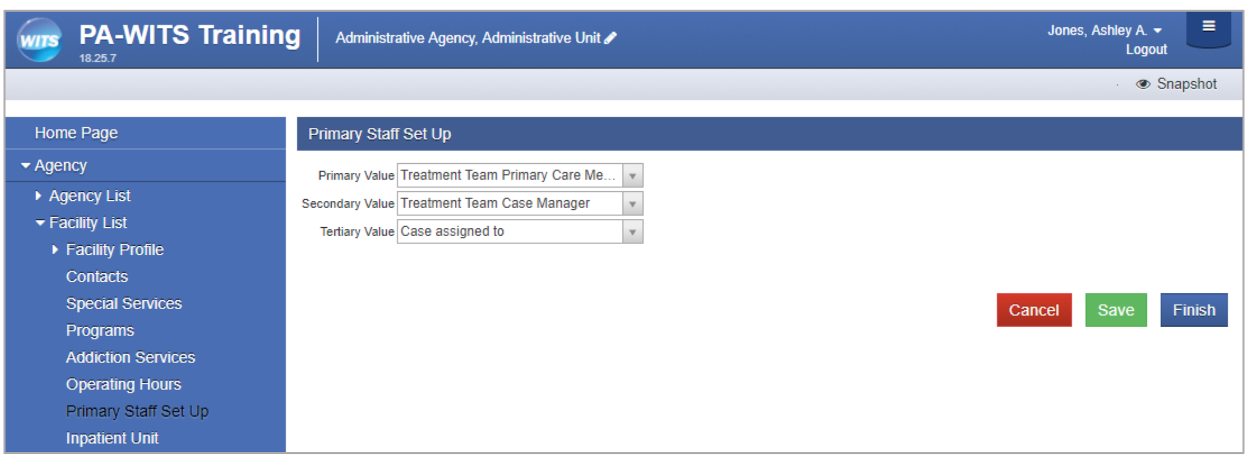


Figure 2-23: Primary Staff Set Up screen

2. Complete the fields.

Table 2-5: Primary Staff Set Up fields

Field	Description
Primary Value	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.
Secondary Value	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.
Tertiary Value	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**.

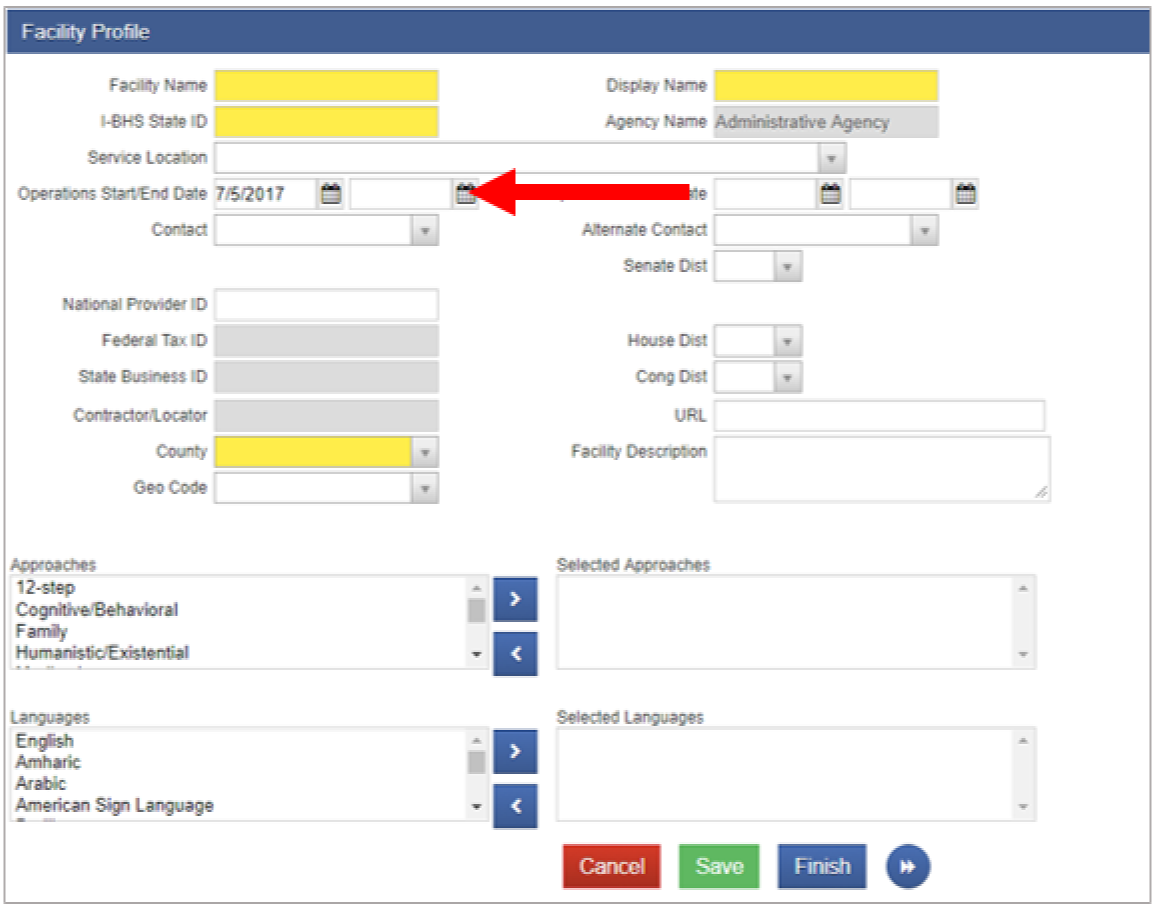
Closing a Facility

***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.



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.

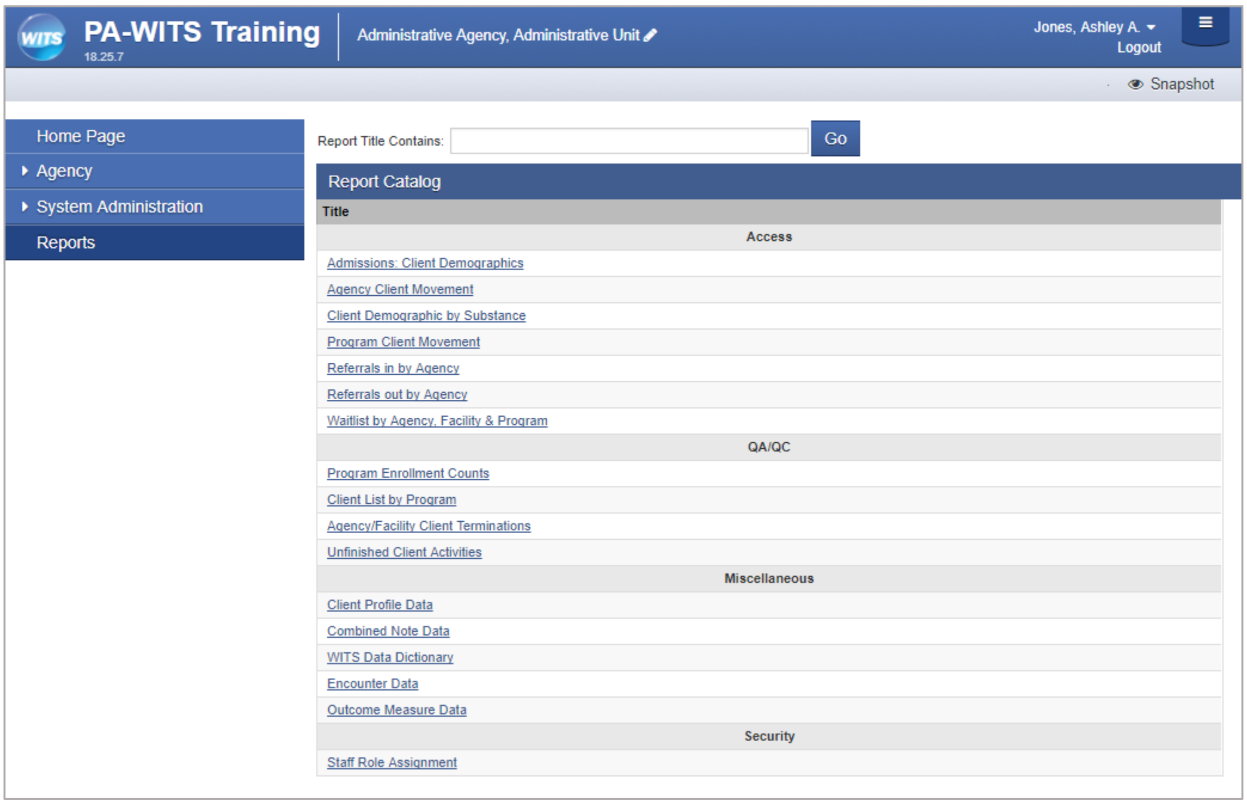


Figure 4-1: Report Catalog screen

Access Reports

Table 4-1: Access Reports in Report Catalog

Report Title	Description
Admissions: Client Demographics	Purpose: Report will provide counts and percentages of admitted clients by client demographic
Agency Client Movement	Purpose: Summarizes number of admissions, clients receiving services, discharges, and average LOS by Agency.
Client Demographic by Substance	Purpose: To display demographic information by substance. Report opens as a PDF files.
Program Client Movement	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.
Referrals in by Agency	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.
Referrals out by Agency	Purpose: Provides counts and percentages of clients referred out by agencies prior, during and after treatment.
Waitlist by Agency, Facility & Program	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
Program Enrollment Counts	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.
Client List by Program	Purpose: Report lists all clients by program and whether they are currently enrolled. If client is not currently enrolled, reason for termination is given.
Agency/Facility Client Terminations	Purpose: This report is designed to highlight any patterns of termination within a program by providing counts of clients terminated for varying reasons.
Unfinished Client Activities	Purpose: Listing of unfinished client activities.

Miscellaneous

Table 4-3: Miscellaneous Reports in Report Catalog

Report Title	Description
Admission Data	Purpose: To report raw Admission data. Export data to Excel spreadsheet.
Client Profile Data	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.
Combined Note Data	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.
WITS Data Dictionary	Export data dictionary to Excel spreadsheet.
Discharge Data	Purpose: To report raw Discharge data. Export Discharge Data to Excel spreadsheet.
Encounter Data	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.
Outcome Measure Data	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
Staff Role Assignment	Purpose: Report lists the staff security roles, staff member type, role level, agency, facility assignments, and employment start and end date.