SOR III GPRA

Client Profile → Intake → Program Enrollment → GPRA Intake → GPRA 6-Month Follow-up → GPRA Discharge → Close Program Enrollment and Intake

Search for a Client

Client List

1. Click **Client List** on the left menu of WITS.
2. Input the available information (eg. Last Name, UCN). Click **Search**.
3. If client is found, hover over the ellipsis ⋮ to access links to the client's information.

Add a New Client

Client List

1. Click **Client List on** the left menu of WITS.
2. Click **+ Add Client** on the Client Search page.
3. Fill out the information for the new client.
4. Click **Save.**

Add Client's Address

Client List

1. After the client's name, birthdate, etc., has been saved, click **+ Add Address** at the Address panel.
2. Fill out the client's address.
3. Click **Save and Finish.**

Input Additional Information

Client Profile > Additional Information

1. After completing the client's address, click **Additional Information** on the left menu.
2. Fill out the information on each additional screen and save to complete the client information.
3. Click **Save** and **Finish** when complete to return to the **Client List**.

Add Payor Enrollment

Client Profile > Client Group Enrollment

1. In the **Client Profile** menu, click **Client Group Enrollment.**
2. Click **+ Add Government Contract Enrollment**.
3. Fill out the required information.
4. Click **Save**.

Start a New Episode

Activity List > Episode List

1. In the **Activity List** menu, click **Episode List.**
2. Click **+ Start New Episode** .
3. Fill out the Intake information for the episode.
4. Click **Save and Finish**.

Enroll in a SOR Program

Activity List > Program Enroll

1. In the **Activity List** menu, click **Program Enroll**.
2. Click **+ Add Enrollment**.
3. Select a SOR program and enter the enrollment start date.
4. Click **Save and Finish**.

WARNING

Fields that have Orange indicators to the left of text boxes are required, and the page cannot be saved until the field is completed.

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Record GPRA Intake

Activity List> GPRA Assessment

1. In the **Activity List** menu**,** click **GPRA Assessment**.
2. Click **+ Create New GPRA Assessment**.
3. On the pop-up, select **Intake** for the interview type, and fill out the rest of the information. Click **Save.**
4. Fill out the information for the GPRA.
5. At the bottom of the screen click **Complete**.
6. Confirm that you would like to complete and lock the assessment by clicking **Ok.**

Record GPRA Follow up

Activity List> GPRA Assessment

Note: The follow-up interview must be done between 5-8 months after the GPRA Intake per SOR grant requirements.

1. In the **Activity List** menu**,** click **GPRA Assessment**.
2. Click **+ Create New GPRA Assessment**.
3. On the pop-up, select **6 month follow-up** for the interview type, and fill out the rest of the information. Click **Save.**
4. Fill out the information for the GPRA.
5. At the bottom of the screen click **Complete**.
6. Confirm that you would like to complete and lock the assessment by clicking **Ok.**

Record GPRA Discharge

Activity List> GPRA Assessment

1. In the **Activity List** menu**,** click **GPRA Assessment**.
2. Click **+ Create New GPRA Assessment**.
3. On the pop-up, select **6 month follow-up** for the interview type, and fill out the rest of the information. Click **Save.**
4. Fill out the information for the GPRA.
5. At the bottom of the screen click **Complete**.
6. Confirm that you would like to complete and lock the assessment by clicking **Ok.**

Print GPRA Assessment

Activity List> GPRA Assessment

1. In the **Activity List** menu**,** click **GPRA Assessment**.
2. Hover over the ellipsis on a GPRA interview, then **View**.
3. Click the printer icon in the upper right corner of the screen.
4. Print the page per your browser instructions.

Edit GPRA Assessment

Client Profile> Activity List> GPRA Assessment

1. Hover over the ellipsis next to the **GPRA Assessment** to edit and click **Review**.
2. Scroll down to the bottom of the screen and click **Unlock**.
3. Confirm that you would like to unlock on the pop up by clicking **Ok**.
4. Make edits to the **GPRA Assessment**.
5. When edits are complete, click **Lock** at the bottom of the screen.
6. Confirm that you would like to complete and lock the assessment by clicking **Ok**.

WARNING

If a **GPRA Assessment** is unlocked and edited, it **MUST be locked again** when changes are complete. If it is not locked, the changes will not be included in the nightly upload to SPARS.

Dis-Enroll in SOR Program

Activity List> Program Enroll

1. In the **Activity List** menu, click **Program Enroll**.
2. Hover over the ellipsis ⋮ to the right.
3. Click Review.
4. Put in the end date in the **End Date** field.
5. Select the **Termination Reason**.
6. Click **Save and Finish**.

End Episode of Care

Client Profile> Activity List> Intake

1. In the **Activity List** menu, click **Intake**.
2. Put in the end date in the **Date Closed** field.
3. Click **Save & Close the Case**.
4. Click **Finish**.