

7 - Day Crisis Services Program Enrollment

Purpose: To provide a process and expectations of using the crisis program enrollment in WITS.

- Crisis program enrollments can be utilized for those in crisis and services are expected to last 7 days or less.
- Crisis program enrollments will require an intake and will require a note in WITS containing the following:
 - a. Assessment of current crisis
 - b. Risk Assessment
 - c. Goal of crisis intervention
 - d. Transition plan after crisis services
 - e. Rational for using crisis enrollment
- Crisis enrollment can be utilized for the following:
 - a. Person is expected to receive services for 7 days or less.
 - b. Service is being rendered (e.g. counseling, safety planning, medication appointment).
- Non-episode notes can be used for phone calls and walk-ins that do not require in-depth or ongoing treatment.
- On-going services will require a change in program enrollment to the appropriate program.
- Supervisors shall be notified when utilizing a crisis program enrollment.

Search/Create & Complete the Client Profile

1. **Getting here:** Login, select the **Facility**, select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen. **Search for an existing record by entering the first 3 letters of the last name followed by an ***. If the client already exists in WITS, proceed to step 5.
2. If the system does not return a match, Click **Add Client** on the right-hand side of the blue bar.

The screenshot displays the WITS Idaho-WITS Training interface. The top navigation bar includes the WITS logo, the text 'Idaho-WITS Training', and a 'Logout' button. Below the navigation bar, the user's name 'User: Wherry, Sue' and location 'Location: IDHW, DBH, Region 4, Boise' are shown. A search bar contains the text 'Client: Smith, Bruce | 1010519600002R | 1' and a 'Clear Client' button. A notification banner states 'The filter you created has been applied to the client list.' Below this is the 'Client Search' form with various input fields: Agency (IDHW, DBH, Region 4), Facility (dropdown), First Name, Last Name (with a red arrow pointing to the search criteria '*'), SSN, DOB, Idaho-WITS Training Client Id, Unique Client Number, Provider Client ID, Treatment Staff, Primary Care Staff, Case Status (All Clients), Intake Staff, Other Number, and Number Type. There are 'Clear' and 'Go' buttons at the bottom of the form. Below the form is a 'Client List (Export)' section with an 'Add Client' button. A table lists client records with columns for Actions, Unique Client #, Full Name, DOB, SSN, and Gender.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	2041313262103A	Huckleberry, Caldonia B	4/13/1982	514-33-8621	Female
	11014174987407E	June, George	10/14/1974	123-65-9874	Male
	10105196000002R	Smith, Bruce	1/5/1996	000-00-0000	Male
	10629179953204A	Smith, Dan	6/29/1979	123-54-9032	Male

3. Complete the **Client Profile** screens which include:

- a. Client Profile
- b. Additional Information
- c. Contact Info (Address).

4. Click **Activity List** on the Navigation Pane.

Client: Smith, Albert | 10810205000001L Clear Client

Home Page
Agency Contacts
Agency
Dispensary
Group List
Clinical Dashboard
Client List
Client Profile
Alternate Names
Additional Information
Contact Info
Collateral/Cust. Contacts
Other Numbers
History
Client Group Enrollment
Authorization
Employment
Allergies
Client External History
Gain Short Screener
Benefit Application
Linked Consents
Client Contacts
Non-Episode Contact
Activity List

Profile

First Name: Albert
Middle Name:
Last Name: Smith
Suffix:
Gender: Male
DOB: 8/10/2005
SSN: 000-00-0000

Provider Client ID:
Unique Client Number: 10810205000001L
State Client ID:
Record Created By: Wherry, Sue
Last Updated By: Wherry, Sue
Created Date: 1/5/2016 4:59 PM
Last Updated Date: 1/5/2016 4:59 PM
Date of Death:
Drivers License:
Access Category: Child
Has paper file: Yes

Administrative Actions
Download c32 View

Cancel Save Finish

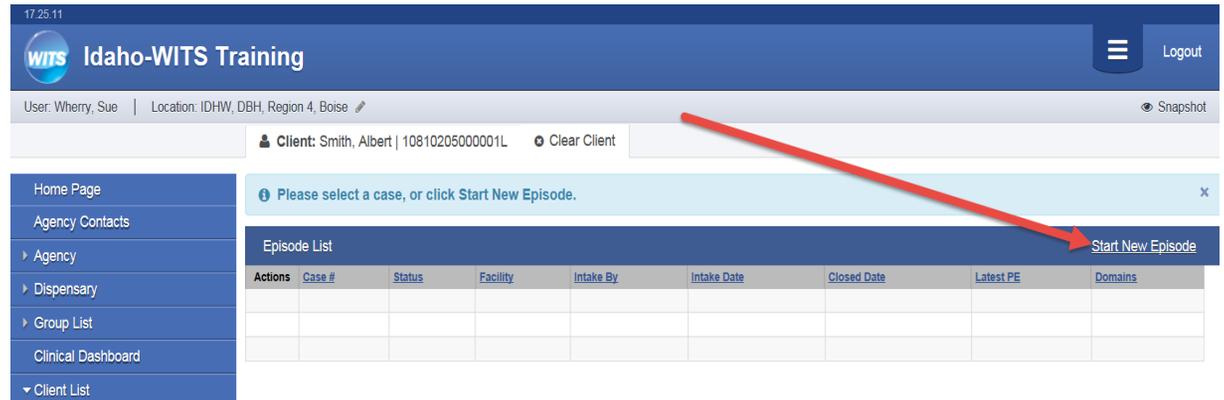
Alternate Names

Actions	Last Name	First Name	Middle Name	Client Ali

Addresses

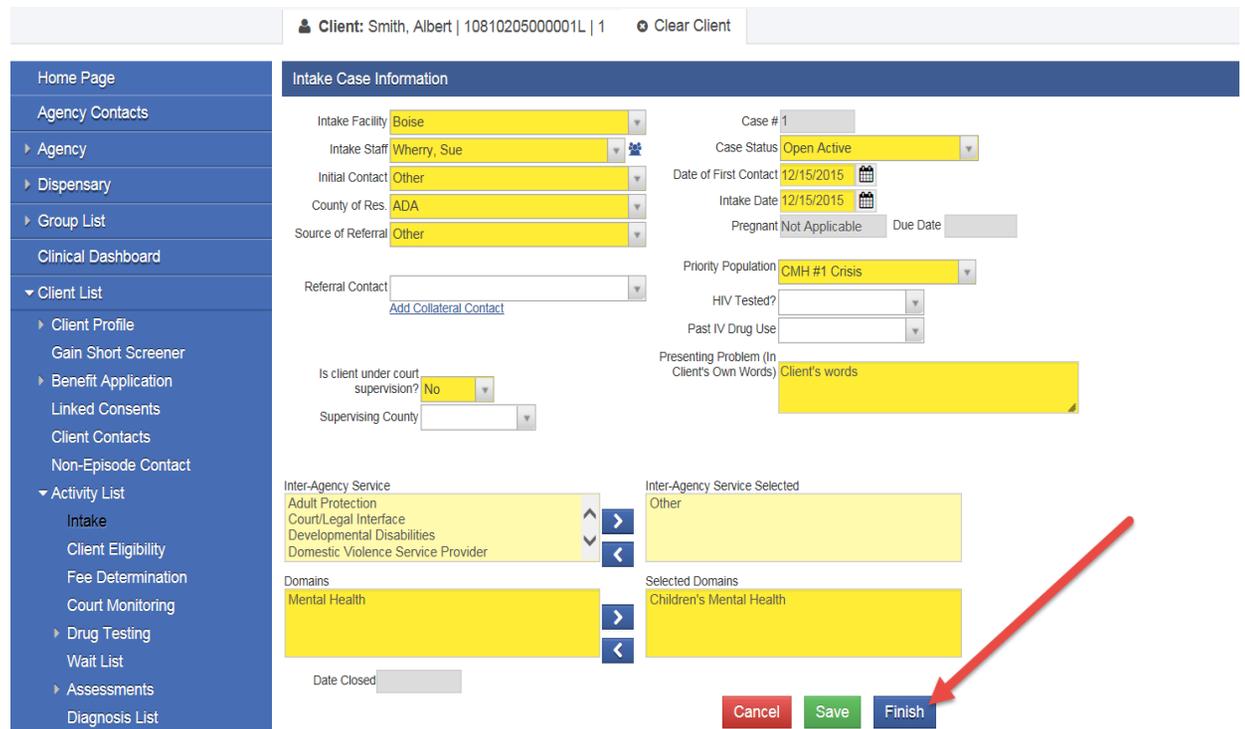
Create/Complete the Intake

5. Click **Start New Episode** on the right-hand side of the blue bar.



The screenshot shows the top navigation bar with the WITS logo and 'Idaho-WITS Training' text. Below the navigation bar, the user information is displayed: 'User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise'. A blue bar contains the text 'Please select a case, or click Start New Episode.' with a red arrow pointing to the 'Start New Episode' button on the right. Below this bar is the 'Episode List' table with columns: Actions, Case #, Status, Facility, Intake By, Intake Date, Closed Date, Latest PE, and Domains. The table is currently empty.

6. Complete all **yellow fields** on the Intake. Click **Finish**.



The screenshot shows the 'Intake Case Information' form. The form contains several fields, many of which are highlighted in yellow to indicate they need to be completed. These fields include: Intake Facility (Boise), Intake Staff (Wherry, Sue), Initial Contact (Other), County of Res. (ADA), Source of Referral (Other), Referral Contact (Add Collateral Contact), Priority Population (CMH #1 Crisis), Presenting Problem (Client's words), Inter-Agency Service (Adult Protection), Inter-Agency Service Selected (Other), Domains (Mental Health), and Selected Domains (Children's Mental Health). The form also includes a 'Date Closed' field and a 'Date of First Contact' field. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Finish'. A red arrow points to the 'Finish' button.

Create/Complete a Client Eligibility Screen

7. Click **Client Eligibility** on the Navigation Pane.

Client: Smith, Albert | 10810205000001L | 1 Clear Client

- Home Page
- Agency Contacts
 - Agency
 - Dispensary
 - Group List
- Clinical Dashboard
- Client List
 - Client Profile
 - Gain Short Screener
 - Benefit Application
 - Linked Consents
 - Client Contacts
 - Non-Episode Contact
 - Activity List
 - Intake
 - Client Eligibility**
 - Fee Determination
 - Court Monitoring
 - Drug Testing
 - Wait List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	12/15/2015	1/5/2016	Completed
	Intake Transaction	12/15/2015	1/5/2016	Completed

8. Click **Add New** on the right-hand side of the blue bar.

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise Snapshot

Client: Smith, Albert | 10810205000001L | 1 Clear Client

- Home Page
- Agency Contacts
 - Agency
 - Dispensary
 - Group List

Actions	Date	Type	Eligibility	Determination Date

[Add New](#)

9. Complete all **yellow fields**.

10. **Indicate eligibility for 7-Day Crisis Services in the Comments Box.**

11. Click **Save** and **Finish**.

NOTE: Approval or Denial Client Eligibility Letters will NOT be utilized for clients who are eligible for the 7-Day Crisis Services Program.

Create the Program Enrollment

12. Click **Program Enroll** on the Navigation Pane.

Location: IDHW, DBH, Region 4, Boise

Client: Smith, Albert | 1081020500001L | 1 Clear Client

Client Eligibility Profile

Mental Health Assessment: Date:	Recommendation:	Type:	Client Type:	Court Monitoring:
CAFAS/PECFAS: Date:	CA/LOCUS: Date:	Type:	Overall Score:	Level of Care:

Consent to Treat: (Relation): Smith, Mary (Mother)

Type: **Crisis** Location of Client: **Office** [Add Contact](#)

Date of First Contact: 12/15/2015 DE/Evaluation?

Initial Assessment Date: Evaluator:

Assessment Staff: Evaluation Date:

Client Eligibility Status: **Eligible** Court Monitoring Activity:

Final Determination Date: 12/15/2015 Date Decision Reversed on Appeal:

MH Appointment Date: MH Appointment Time: MH Appointment Staff:

Ineligible Reasons: No Mental Health Diagnosis, Diagnosis not Eligible, Eligible diagnosis; No functional Impairment, Functional Impairment; No Eligible diagnosis

Selected Ineligible Reasons:

Referral To:

Comments: Eligible for 7-Day Crisis Services

Administrative Actions: [Print Child Approval Letter \(English\)](#) [Print Child Approval Letter \(Spanish\)](#)

Cancel Save Finish

Client: Smith, Albert | 1081020500001L | 1 Clear Client

Client Eligibility List

Actions	Date	Type	Eligibility	Determination Date
	1/6/2016	Crisis	Eligible	12/15/2016

[Add New](#)

Program Enroll

13. Click **Add Enrollment** on the right side of the blue bar.

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise | Snapshot

Client: Smith, Albert | 10810205000001L | 1 Clear Client

Home Page
Agency Contacts
Agency
Dispensary
Group List
Clinical Dashboard
Client List
Client Profile
Gain Short Screener
Benefit Application
Linked Consents
Client Contacts
Non-Episode Contact

Program Enrollment

Program Name: [] Facility: []
Modality: []
From: [] To: []
Active Program Enrollments During Date Range: 1/6/2016 [] 1/6/2016 []
Clear Go

Program Enrollment List

Actions	Program Name	Start Date	End Date	Facility	Notes

Add Enrollment

Finish

14. Select **7-Day Crisis Services** as the Program Name. **Edit the Start Date** as necessary.

15. Click **Save** and **Finish**.

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise | Snapshot

Client: Smith, Albert | 10810205000001L | 1 Clear Client

Home Page
Agency Contacts
Agency
Dispensary
Group List
Clinical Dashboard
Client List
Client Profile
Gain Short Screener
Benefit Application
Linked Consents
Client Contacts
Non-Episode Contact
Activity List
Intake

Program Enrollment Profile

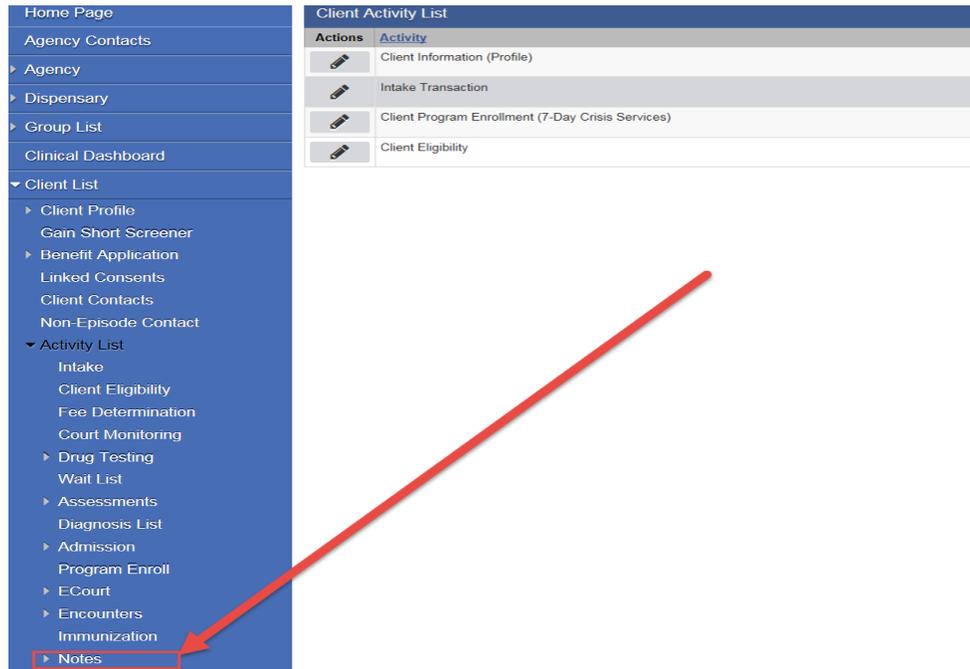
Facility: Boise
Days on Wait List: [] Start Date: 1/6/2016 []
End Date: []

Program Name: [7-Day Crisis Services]
Program Staff: []
Termination Reason: [19-2524 Assessment Only]
Notes: [7-Day Crisis Services]

Cancel Save Finish

Create Misc. Notes to document all Activity

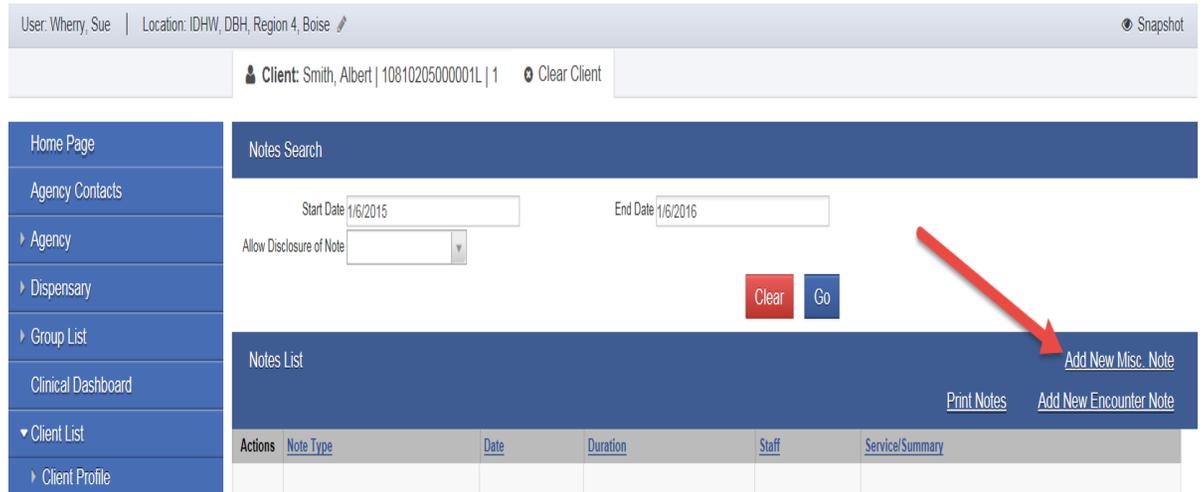
16. Click **Notes** on the Navigation Pane.



The screenshot shows a navigation pane on the left with a blue background. The 'Notes' option is highlighted with a red box. A red arrow points from the 'Notes' option to the right. On the right, the 'Client Activity List' is displayed with a table of actions:

Actions	Activity
	Client Information (Profile)
	Intake Transaction
	Client Program Enrollment (7-Day Crisis Services)
	Client Eligibility

17. Click **Add New Misc. Note** on the right side of the blue bar.



The screenshot shows the 'Notes Search' and 'Notes List' interface. The 'Add New Misc. Note' button is highlighted with a red arrow. The interface includes search filters for Start Date, End Date, and Allow Disclosure of Note.

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise | Snapshot

Client: Smith, Albert | 10810205000001L | 1 | Clear Client

Notes Search

Start Date: 1/6/2015 | End Date: 1/6/2016

Allow Disclosure of Note: [dropdown]

Clear Go

Notes List

Print Notes | Add New Encounter Note

Add New Misc. Note

Actions	Note Type	Date	Duration	Staff	Service/Summary
---------	-----------	------	----------	-------	-----------------

18. Complete all **yellow fields**.

19. **Enter a note in the Unsigned Notes box.**

17:25:11
wits Idaho-WITS Training
User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise
Client: Smith, Albert | 10810205000001L | 1 Clear Client

Home Page
Agency Contacts
Agency
Dispensary
Group List
Clinical Dashboard
Client List
Client Profile
Gain Short Screener
Benefit Application
Linked Consents
Client Contacts
Non-Episode Contact
Activity List
Intake
Client Eligibility
Fee Determination
Court Monitoring
Drug Testing
Wait List

Miscellaneous Notes
Author Name: Wherry, Sue
Author Title:
Created Date:
Note Type: Crisis Note Service Date: 12/16/2015 Duration: 30 Min
Program: Start Time: 10:00 AM Alert No: Mark Alert
Frequency: End Time: 10:30 AM Was Report Sent to State:
Summary: Summary of visit
Signed Notes:
Unsigned Notes: detailed notes regarding visit
Release these notes? No Cancel Save Finish
Add Note Sign Note

20. Click **Sign Note**.

NOTE: Selecting Sign Note will move the Unsigned Note to the Signed Notes box and will include the electronic signature of the person, and the date and time the note was signed. The Note is no longer editable.

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise
Client: Smith, Albert | 10810205000001L | 1 Clear Client

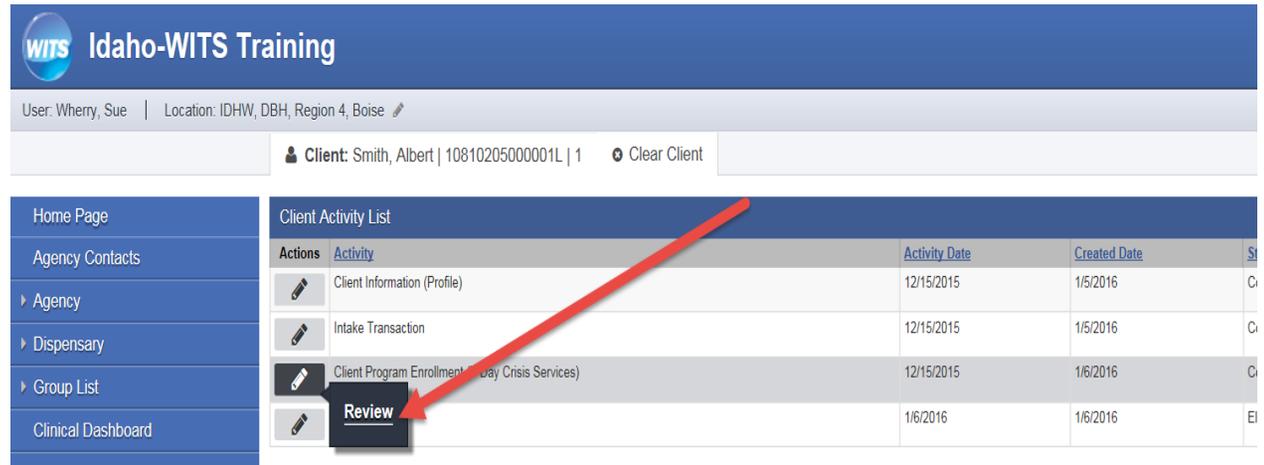
Home Page
Agency Contacts
Agency
Dispensary
Group List
Clinical Dashboard
Client List
Client Profile
Gain Short Screener
Benefit Application
Linked Consents
Client Contacts
Non-Episode Contact
Activity List
Intake
Client Eligibility
Fee Determination
Court Monitoring
Drug Testing
Wait List

Miscellaneous Notes
Author Name: Wherry, Sue
Author Title:
Created Date:
Note Type: Crisis Note Service Date: 12/16/2015 Duration: 30 Min
Program: Start Time: 10:00 AM Alert No: Mark Alert
Frequency: End Time: 10:30 AM Was Report Sent to State:
Summary: Summary of visit
Signed Notes: Signed by Wherry, Sue, 1/6/2016 5:04:18 PM: detailed notes regarding visit
Unsigned Notes:
Release these notes? No Cancel Save Finish
Add Note Sign Note

Selecting **Sign Note** will move the note to the Signed Notes box and enter date, time and name of signer.
** Note is no longer editable.

Close the Program Enrollment

1. At the end of the 7-Day period, close the Program Enrollment. On the Client Activity List, hover over the  and select **Review** under the actions column for the Program Enrollment.



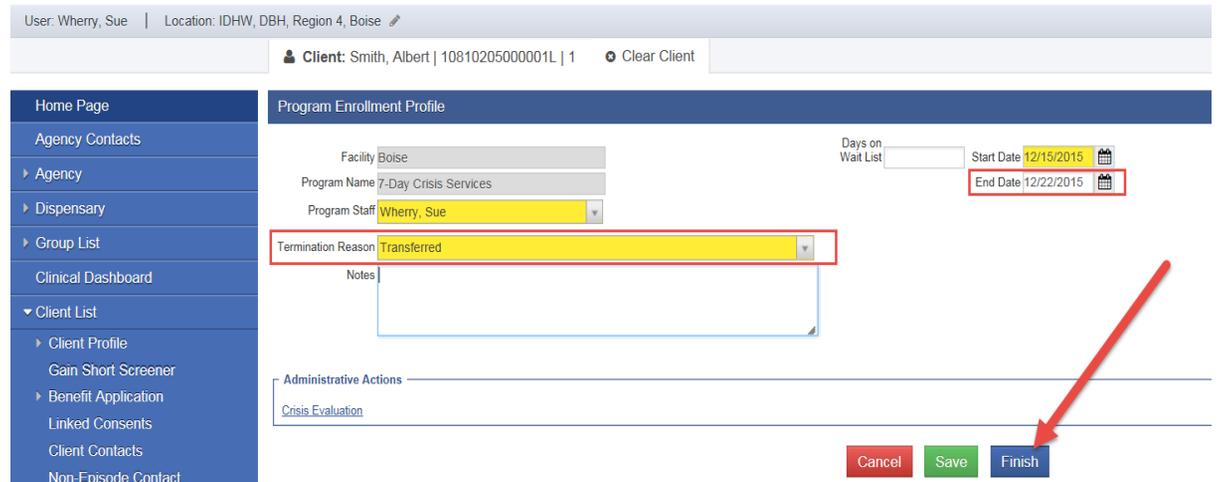
Idaho-WITS Training

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise

Client: Smith, Albert | 10810205000001L | 1 Clear Client

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	12/15/2015	1/5/2016	C
	Intake Transaction	12/15/2015	1/5/2016	C
	Client Program Enrollment (7-Day Crisis Services)	12/15/2015	1/6/2016	C
	Review	1/6/2016	1/6/2016	EI

2. Enter the **End date**, select the **Termination Reason**, and click **Finish**.



Idaho-WITS Training

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise

Client: Smith, Albert | 10810205000001L | 1 Clear Client

Program Enrollment Profile

Facility: Boise

Program Name: 7-Day Crisis Services

Program Staff: Wherry, Sue

Days on Wait List:

Start Date: 12/15/2015

End Date: 12/22/2015

Termination Reason: Transferred

Notes:

Administrative Actions

Crisis Evaluation

Cancel Save Finish

Close the Intake

3. Click **Intake** on the Navigation Pane.

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise

Client: Smith, Albert | 10810205000001L | 1 Clear Client

Program Enrollment

Program Name: Facility:
Modality:

From: To:
Active Program Enrollments During Date Range: 1/6/2015 1/6/2016

Program Enrollment List

Actions	Program Name	Start Date	End Date
	7-Day Crisis Services	12/15/2015	12/22/2015

4. Enter the **Date Closed** and click **Save & Close the Case**. The case is now Read-Only.

Client: Smith, Albert | 10810205000001L | 1 Clear Client

Intake Case Information

Intake Facility: Case #:
Intake Staff: Case Status:
Initial Contact: Date of First Contact:
County of Res.: Intake Date:
Source of Referral: Pregnant: Due Date:
Referral Contact: Priority Population:
[Add Collateral Contact](#) HIV Tested?:
Is client under court supervision? Past IV Drug Use:
Supervising County: Presenting Problem (In Client's Own Words):

Inter-Agency Serv: Inter-Agency Service Selected:
Domains: Selected Domains:

Calendar: Dec 2015

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Date Closed:

Actions: [Move Intake](#) [Delete Intake](#)