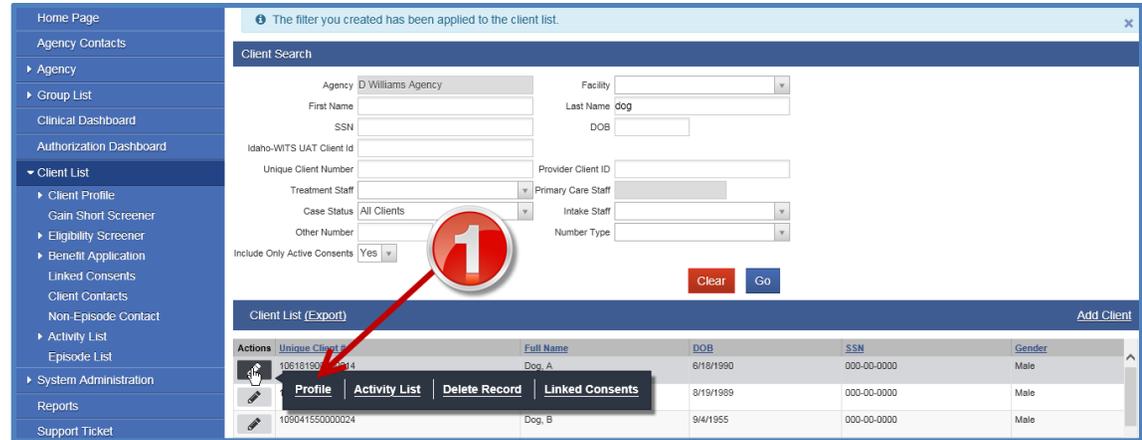


Completing Follow Up Surveys for DHW Adult Clients

NOTE: DHW Adult clients must sign an informed consent specific to outcome data collection located on the WITS website [here](#) or on the BPA website [here](#).

Locate Client

1. **Getting here:** Login, select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, find client, click  and select **Profile**.



The filter you created has been applied to the client list.

Client Search

Agency: D Williams Agency | Facility: [Dropdown]
First Name: [Text] | Last Name: Oog
SSN: [Text] | DOB: [Text]
Idaho-WITS UAT Client Id: [Text]
Unique Client Number: [Text] | Provider Client ID: [Text]
Treatment Staff: [Dropdown] | Primary Care Staff: [Text]
Case Status: All Clients | Intake Staff: [Dropdown]
Other Number: [Text] | Number Type: [Dropdown]
Include Only Active Consents: Yes [Dropdown]

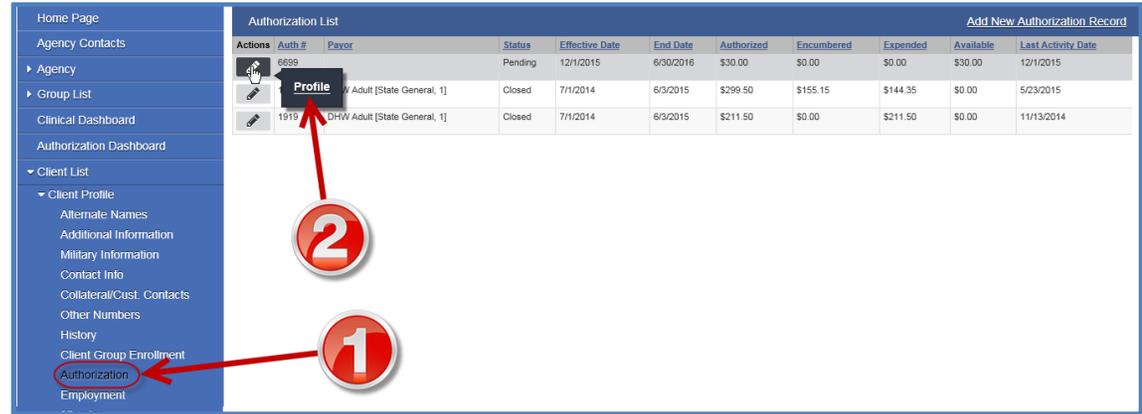
Clear Go

Client List (Export) Add Client

Actions	Unique Client ID	Full Name	DOB	SSN	Gender
 Profile Activity List Delete Record Linked Consents	10618100000014	Dog, A	8/18/1990	000-00-0000	Male
	1060415500000024	Dog, B	8/19/1989	000-00-0000	Male
			8/4/1955	000-00-0000	Male

Accept the Authorization

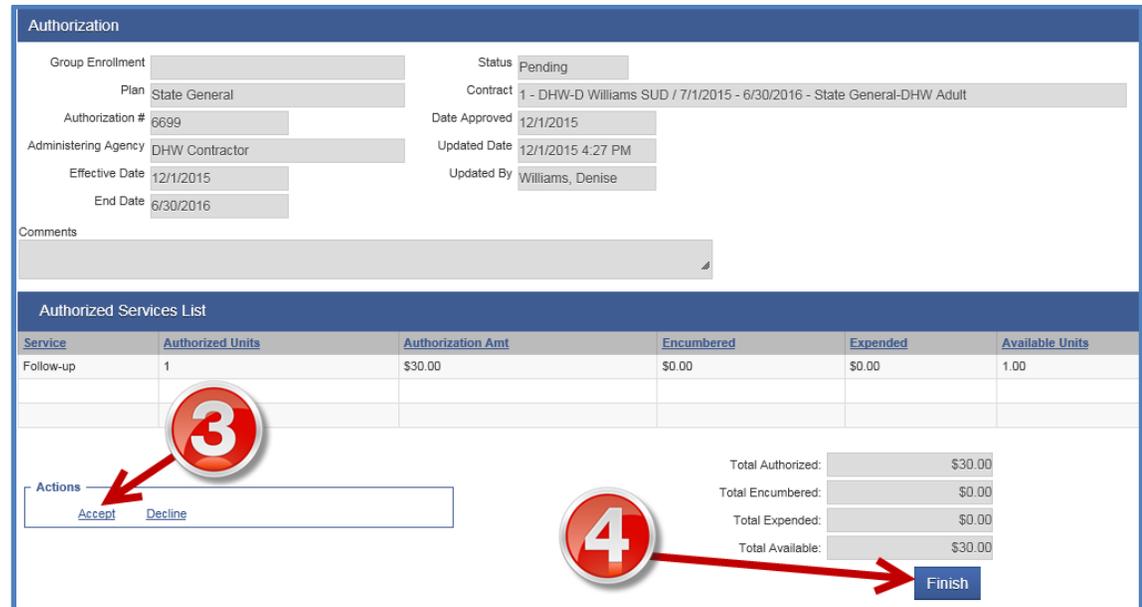
1. Click **Authorization** on the Navigation Pane.
2. Click  and select **Profile**.



The screenshot shows the 'Authorization List' page. On the left is a navigation pane with 'Authorization' circled in red and labeled '1'. In the main content area, a table lists authorization records. The first record is highlighted, and a red arrow labeled '2' points to the 'Profile' link in the 'Actions' column.

Actions	Auth #	Payer	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date
 Profile	6699	W Adult [State General, 1]	Pending	12/1/2015	6/30/2016	\$30.00	\$0.00	\$0.00	\$30.00	12/1/2015
 Profile	1919	DHW Adult [State General, 1]	Closed	7/1/2014	6/3/2015	\$299.50	\$155.15	\$144.35	\$0.00	5/23/2015
			Closed	7/1/2014	6/3/2015	\$211.50	\$0.00	\$211.50	\$0.00	11/13/2014

3. Click **Accept** in the Actions box.
4. Click **Finish**.



The screenshot shows the 'Authorization' details page. It includes fields for Group Enrollment, Plan, Authorization #, Administering Agency, Effective Date, End Date, Status, Contract, Date Approved, Updated Date, and Updated By. Below this is a table for 'Authorized Services List' and a summary of financials. Red arrows and callouts 3 and 4 indicate the steps.

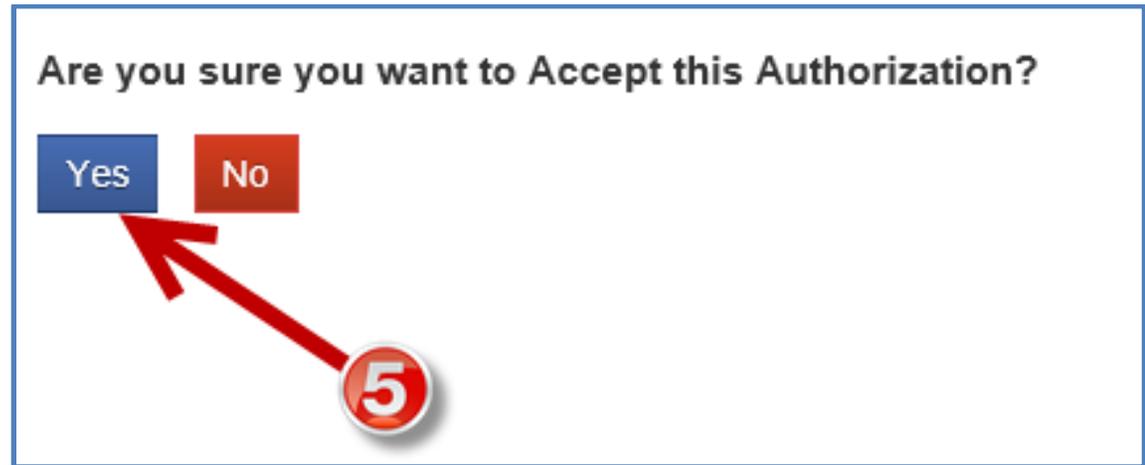
Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
Follow-up	1	\$30.00	\$0.00	\$0.00	1.00

Summary:

Total Authorized:	\$30.00
Total Encumbered:	\$0.00
Total Expended:	\$0.00
Total Available:	\$30.00

The 'Actions' box contains 'Accept' and 'Decline' buttons. The 'Finish' button is located at the bottom right of the page.

5. Click Yes.



6. Click Finish.

Authorization

Group Enrollment	DHW Adult	Status	Active
Plan	State General	Contract	1 - DHW-D Williams SUD / 7/1/2015 - 6/30/2016 - State General-DHW Adult
Authorization #	6699	Date Approved	12/1/2015
Administering Agency	DHW Contractor	Updated Date	12/2/2015 9:45 AM
Effective Date	12/1/2015	Updated By	Williams, Denise
End Date	6/30/2016		

Comments

Authorized Services List

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
Follow-up	1	\$30.00	\$0.00	\$0.00	1.00

Actions: [Close](#) [Requests](#)

Total Authorized:	\$30.00
Total Encumbered:	\$0.00
Total Expended:	\$0.00
Total Available:	\$30.00

6

Finish

Create the Follow Up Program Enrollment

1. Click **Activity List** and **Program Enroll** on the Navigation Pane.
2. Click **Add Enrollment**.

The screenshot shows the 'Program Enrollment' page. On the left is a navigation pane with 'Activity List' and 'Program Enroll' circled in red. A red arrow labeled '1' points from 'Activity List' to the 'Program Enrollment List' table. The table has columns for 'Actions', 'Program Name', 'Start Date', 'End Date', 'Facility', and 'Notes'. One row is visible for 'Adult Recovery Support Services' at 'Williams Treatment'. A red arrow labeled '2' points to the 'Add Enrollment' button in the top right corner of the table area.

3. Select the program **Follow Up**. Enter **Days on Wait List**.
4. Click **Save** and **Finish**.

The screenshot shows the 'Program Enrollment Profile' page. The 'Facility' dropdown is set to 'Williams Treatment'. The 'Program Name' dropdown is set to 'Follow-Up' and is highlighted in yellow. The 'Program Staff' dropdown is set to 'Williams, Denise'. The 'Days on Wait List' field is set to '0' and is highlighted in yellow. The 'Start Date' is set to '12/2/2015'. The 'End Date' field is empty. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Finish'. A red arrow labeled '3' points to the 'Program Name' dropdown, and another red arrow labeled '3' points to the 'Days on Wait List' field. A red arrow labeled '4' points to the 'Save' button, and another red arrow labeled '4' points to the 'Finish' button.

Complete the Follow Up Survey

1. Click **Follow Up**.
2. Click **Add New Annual Update Record**.

Home Page | Follow-Up List | Add New Annual Update Record

Agency Contacts | Actions | Follow Up Type | Follow Up Status | Discharge Date | Follow Up Date

Agency

Group List

Clinical Dashboard

Authorization Dashboard

Client List

Client Profile

Gain Short Screener

Eligibility Screener

Benefit Application

Linked Consents

Client Contacts

Non-Episode Contact

Activity List

Intake

Fee Determination

Drug Testing

Wait List

Screening

Assessments

Admission

Program Enroll

ECourt

Diagnosis List

Encounters

Notes

ASAM

Treatment

Follow-up

3. Select the Follow Up Type of **30 Day, or 6 month, or 12 month**. Select the type of **Health Insurance** for the client and select the **Follow Up Status**.

4. Enter the **Follow Up Date**.

5. Click  .

Follow Up Profile

Follow Up Type: 30 Day

Health Insurance: None

Follow Up Status: Completed Follow-Up

Admission Date: 12/2/2015

Discharge Date:

Follow Up Date: 12/02/2015

Record Status

Record Created By: [] Created Date: []

Last Updated By: [] Last Updated Date: []

Cancel Save Finish 

6. Select the **Employment Status, Living Arrangements, Primary Source of Income, Arrests in Prior 30 Days, Source of Information, # of Mail-Out Attempts, # of Telephone Attempts, # of Face-to-Face Attempts, Participated in a Self-Help Group in Past 30 Days, Participated in an Education/Training Program Since Discharge, Graduated From an Education/Training Program Since Discharge** for the client.

7. Click  .

Follow Up Profile (cont.)

Employment Status	<input type="text"/>
Living Arrangements	<input type="text"/>
Primary Source of Income	<input type="text"/>
Arrests in Prior 30 Days	<input type="text"/>
Source of Information	<input type="text"/>
# of Mail-Out Attempts	<input type="text"/>
# of Telephone Attempts	<input type="text"/>
# of Face-to-Face Attempts	<input type="text"/>
Participated in a Self-Help Group in Past 30 Days	<input type="text"/>
Participated in an Education/Training Program Since Discharge	<input type="text"/>
Graduated From an Education/Training Program Since Discharge	<input type="text"/>

Cancel Save Finish  



8. Select the **Substance Used, Freq of Use and Route of Admin** for Primary Drug, Secondary Drug, Tertiary Drug as applicable.

9. Complete **Received Substance Abuse Treatment Since Discharge, Currently in Substance Abuse Treatment, and # of Days in Past 30 Missed Work/School Due to Drinking/Drug Use.**

10. Click  .

Follow Up Substance Abuse

Primary Drug

Substance Used
 Freq of Use
 Route of Admin

Secondary Drug

Substance Used
 Freq of Use
 Route of Admin

Tertiary Drug

Substance Used
 Freq of Use
 Route of Admin

Received Substance Abuse Treatment Since Discharge
 Currently in Substance Abuse Treatment
 # of Days in Past 30 Missed Work/School Due to Drinking/Drug Use



11. Complete Significant Periods of Psychological Distress in Past 30 Days (i.e. depression, anxiety, hallucinations), # of Emergency Room Visits Since Discharge, # of Hospitalizations for Medical Problems Since Discharge, and Pregnant at Time of Follow Up.

12. Click Save and Finish.

NOTE: Update all contact information for the client as applicable.

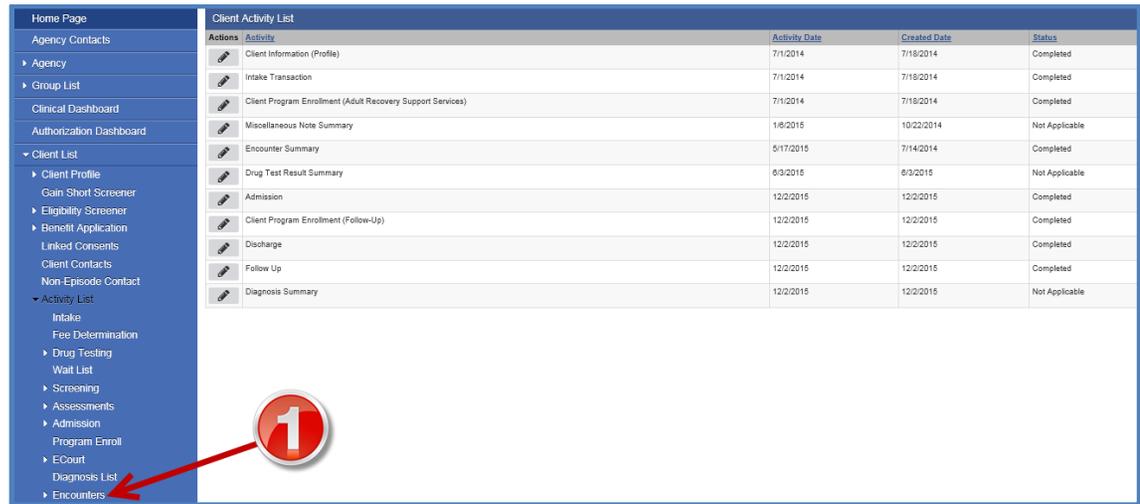
The screenshot shows a form titled "Follow Up Health" with the following fields and values:

Significant Periods of Psychological Distress in Past 30 Days (i.e. depression, anxiety, hallucinations)	No
# of Emergency Room Visits Since Discharge	0
# of Hospitalizations for Medical Problems Since Discharge	1
Pregnant at Time of Follow Up	No

At the bottom of the form are four buttons: "Cancel" (red), "Save" (green), "Finish" (blue), and a back arrow (blue). Two red callout boxes with white numbers are present: "11" points to the "Save" button, and "12" points to the "Finish" button.

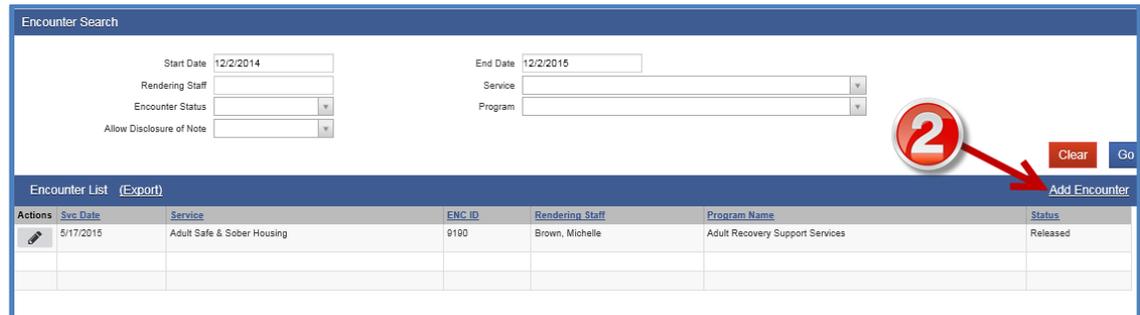
Bill Follow Up Survey (Create an Encounter)

1. Click Encounters on the Navigation Pane.



Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	7/1/2014	7/18/2014	Completed
	Intake Transaction	7/1/2014	7/18/2014	Completed
	Client Program Enrollment (Adult Recovery Support Services)	7/1/2014	7/18/2014	Completed
	Miscellaneous Note Summary	1/8/2015	10/22/2014	Not Applicable
	Encounter Summary	5/17/2015	7/14/2014	Completed
	Drug Test Result Summary	6/3/2015	6/3/2015	Not Applicable
	Admission	12/2/2015	12/2/2015	Completed
	Client Program Enrollment (Follow-Up)	12/2/2015	12/2/2015	Completed
	Discharge	12/2/2015	12/2/2015	Completed
	Follow Up	12/2/2015	12/2/2015	Completed
	Diagnosis Summary	12/2/2015	12/2/2015	Not Applicable

2. Click Add Encounter.



Encounter Search

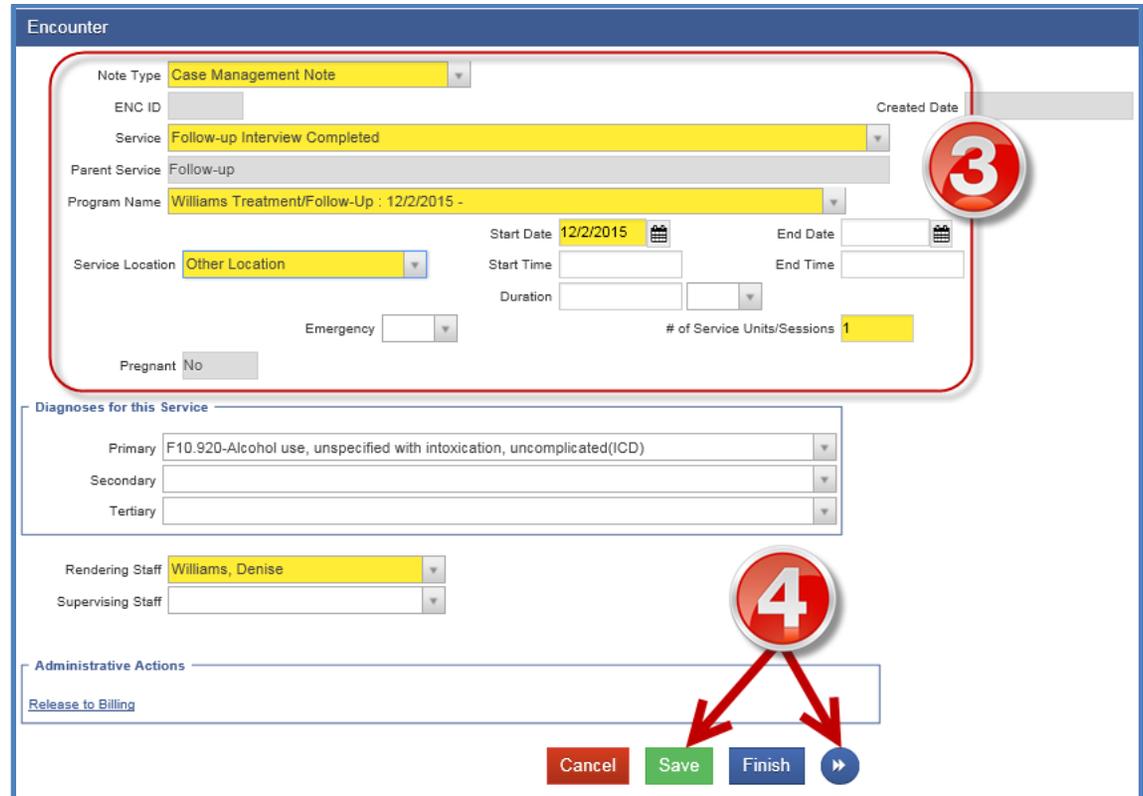
Start Date: 12/2/2014 End Date: 12/2/2015
Rendering Staff: Service: Program: Allow Disclosure of Note: Clear Go

Encounter List (Export) [Add Encounter](#)

Actions	Enc Date	Service	ENC_ID	Rendering Staff	Program Name	Status
	5/17/2015	Adult Safe & Sober Housing	9100	Brown, Michelle	Adult Recovery Support Services	Released

3. Select **Note Type**. Select the Service of **Follow Up 30-Day Interview Completed**, **Follow Up 6-Month Interview Completed** or **Follow Up 12-Month Interview Completed** as appropriate. Enter the **Start Date**, select the **Service Location**, and enter **1** for the **# of Service Units/Sessions**.

4. Click Save and



The screenshot shows the 'Encounter' form with the following fields and values:

- Note Type: Case Management Note
- ENC ID: [Empty]
- Service: Follow-up Interview Completed
- Parent Service: Follow-up
- Program Name: Williams Treatment/Follow-Up : 12/2/2015 -
- Service Location: Other Location
- Start Date: 12/2/2015
- End Date: [Empty]
- Start Time: [Empty]
- End Time: [Empty]
- Duration: [Empty]
- Emergency: [Empty]
- # of Service Units/Sessions: 1
- Pregnant: No

Diagnoses for this Service:

- Primary: F10.920-Alcohol use, unspecified with intoxication, uncomplicated(ICD)
- Secondary: [Empty]
- Tertiary: [Empty]

Rendering Staff: Williams, Denise

Supervising Staff: [Empty]

Administrative Actions:

- Release to Billing

Buttons: Cancel, Save, Finish, Next button.

Annotations: A red circle with the number '3' is placed over the Service and Program Name fields. A red circle with the number '4' is placed over the Save and Finish buttons, with red arrows pointing to them.

5. **Enter a note** in the Unsigned Note section.
6. Click **Sign Note**.
7. Click **Save**.
8. Click **Release to Billing**.

Signed Notes

Unsigned Notes notes|

Allow Disclosure No

5 Enter notes

6

8 Administrative Actions
[Release to Billing](#)

7

Close the Follow Up Program Enrollment

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

Home Page

- Agency Contacts
- Agency
- Group List
- Clinical Dashboard
- Authorization Dashboard
- Client List
 - Client Profile
 - Gain Short Screener
 - Eligibility Screener
 - Benefit Application
 - Linked Consents
 - Client Contacts
 - Non-Episode Contact
- Activity List
 - Intake
 - Fee Determination
 - Drug Testing
 - Wait List
 - Screening
 - Assessments
 - Admission
 - Program Enroll

Encounter Search

Start Date: 12/3/2014 End Date: 12/3/2015

Rendering Staff: Encounter Status: Service: Program:

Allow Disclosure of Note:

Clear Go

Encounter List [Export] Add Encounter

Actions	Enc Date	Service	ENC ID	Rendering Staff	Program Name	Status
	6/17/2015	Adult Safe & Sober Housing	6190	Brown, Michelle	Adult Recovery Support Services	Released

2. Click **Review** for the Follow Up program.

Program Enrollment

Program Name: Modality: Facility:

From: 12/3/2014 To: 12/3/2015

Active Program Enrollments During Date Range

Clear Go

Program Enrollment List Add Enrollment

Actions	Program Name	Start Date	End Date	Facility	Notes
	Follow-Up	12/2/2015		Williams Treatment	
		7/1/2014	6/3/2015	Williams Treatment	

Review Delete

Finish

3. Enter the **End Date** and select a **Termination Reason**.

4. Click **Save** and **Finish**.

The screenshot shows a web form titled "Program Enrollment Profile". The form contains the following fields and controls:

- Facility: Williams Treatment
- Program Name: Follow-Up
- Program Staff: Williams, Denise
- BPA Authorization #: (empty)
- Termination Reason: Funding or Services exhausted
- Notes: (empty text area)
- Days on Wait List: 0
- Start Date: 12/2/2015
- End Date: 12/3/2015
- Buttons: Cancel, Save, Finish

Red callouts are present: a circle with the number "3" has an arrow pointing to the "End Date" field, and another circle with the number "4" has arrows pointing to the "Save" and "Finish" buttons.

Close the Intake

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

The screenshot displays a web application interface. On the left is a navigation pane with the following items: Home Page, Agency Contacts, Agency, Group List, Clinical Dashboard, Authorization Dashboard, Client List, Client Profile, Gain Short Screener, Eligibility Screener, Benefit Application, Linked Consents, Client Contacts, Non-Episode Contact, Activity List, and Intake. A red arrow points to the 'Intake' link. A red circle with the number '1' is overlaid on the arrow. The main content area is titled 'Program Enrollment' and contains search filters for Program Name, Facility, Modality, and Active Program Enrollments During Date Range (From: 12/3/2014, To: 12/3/2015). There are 'Clear' and 'Go' buttons. Below the filters is a 'Program Enrollment List' table with columns for Actions, Program Name, Start Date, End Date, Facility, and Notes. The table contains two rows: 'Follow-Up' and 'Adult Recovery Support Services'. An 'Add Enrollment' button is in the top right, and a 'Finish' button is in the bottom right.

Actions	Program Name	Start Date	End Date	Facility	Notes
	Follow-Up	12/2/2015		Williams Treatment	
	Adult Recovery Support Services	7/1/2014	6/3/2015	Williams Treatment	

2. Enter the **Date Closed** and click **Save & Close the Case**.
3. The record will become read-only. Click **Finish**.

Intake Case Information

Intake Facility	Williams Treatment	Case #	1
Intake Staff	Buskey, Michelle, CADC	Case Status	Open Active
Initial Contact	Other	Date of First Contact	7/1/2014
County of Res.	BOISE	Intake Date	7/1/2014
Source of Referral	Individual/Self	Pregnant	Not Applicable
Referral Contact		Priority Population	IDHW
	Add Collateral Contact	HIV Tested?	
Is client under court supervision?	No	Past IV Drug Use	No
Supervising County		Presenting Problem (In Client's Own Words)	Need help

Inter-Agency Service	Inter-Agency Service Selected
Adult Protection	None
Court/Legal Interface	
Developmental Disabilities	
Domestic Violence Service Center	

Domains	Selected Domains
ATR	Substance Abuse

Date Closed: 12/03/2015 [Save & Close the Case](#)

Cancel **Save** **Finish**