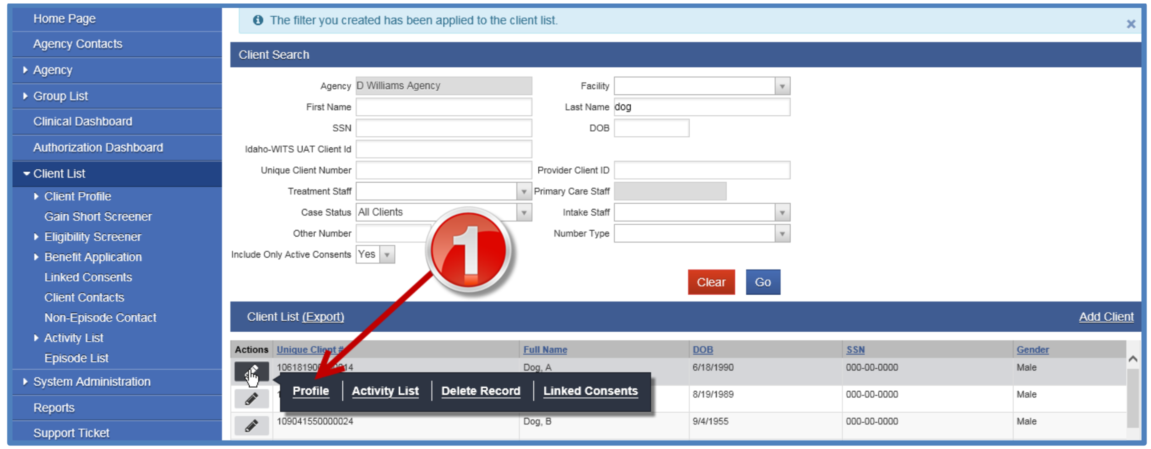
# Completing Follow Up Surveys for DHW Adult Clients

***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**.



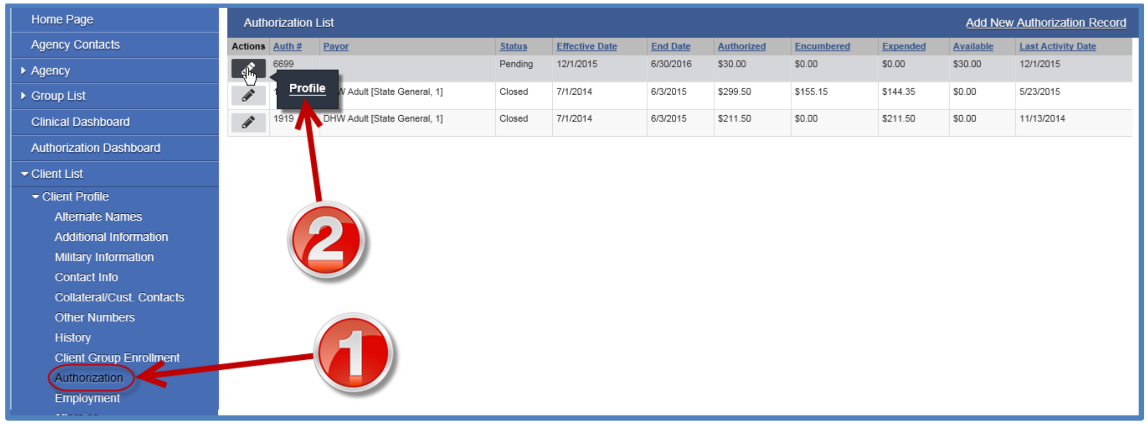



12/08/2015

# Accept the Authorization

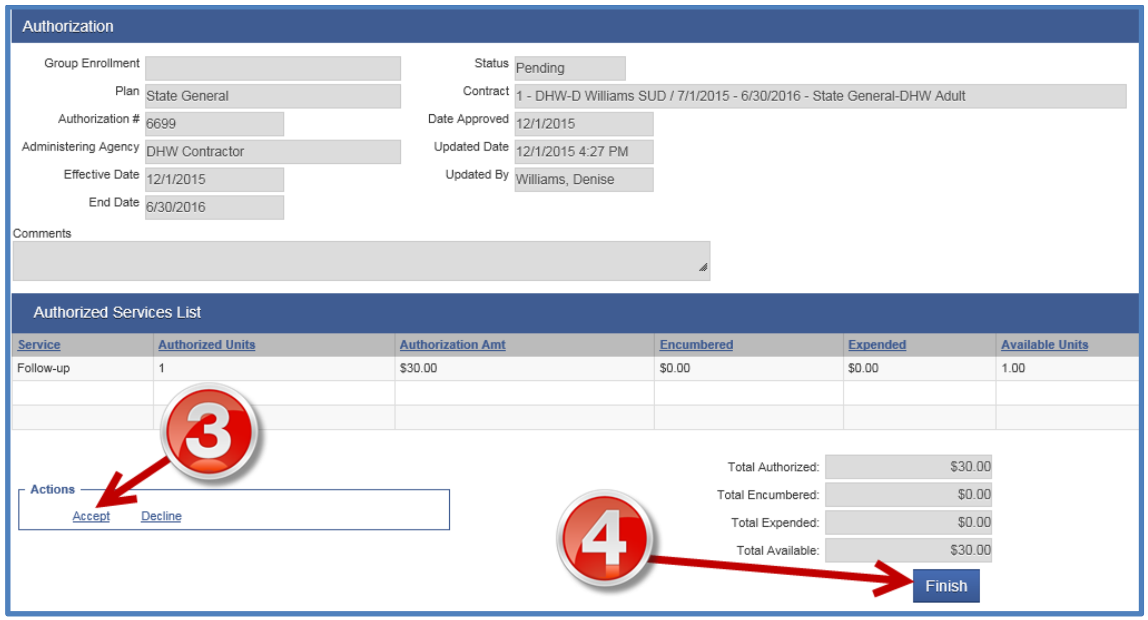
1. Click **Authorization** on the Navigation Pane.

2. Click  and select **Profile**.



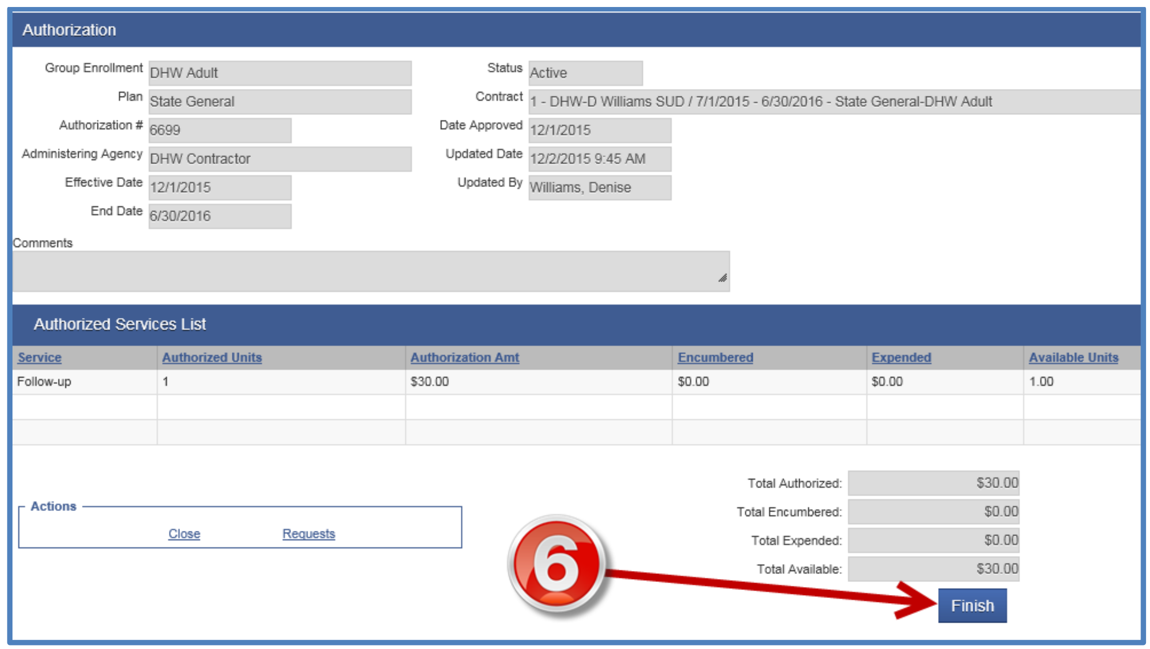

3. Click **Accept** in the Actions box.

4. Click **Finish**.



**5.** Click **Yes**.

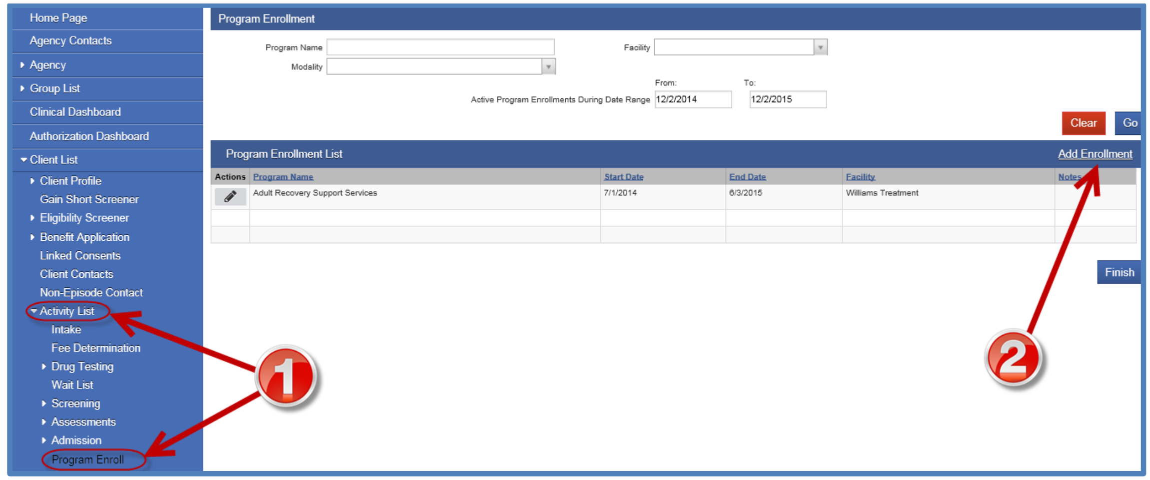

**6.** Click **Finish**.



# Create the Follow Up Program Enrollment

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

2. Click **Add Enrollment**.



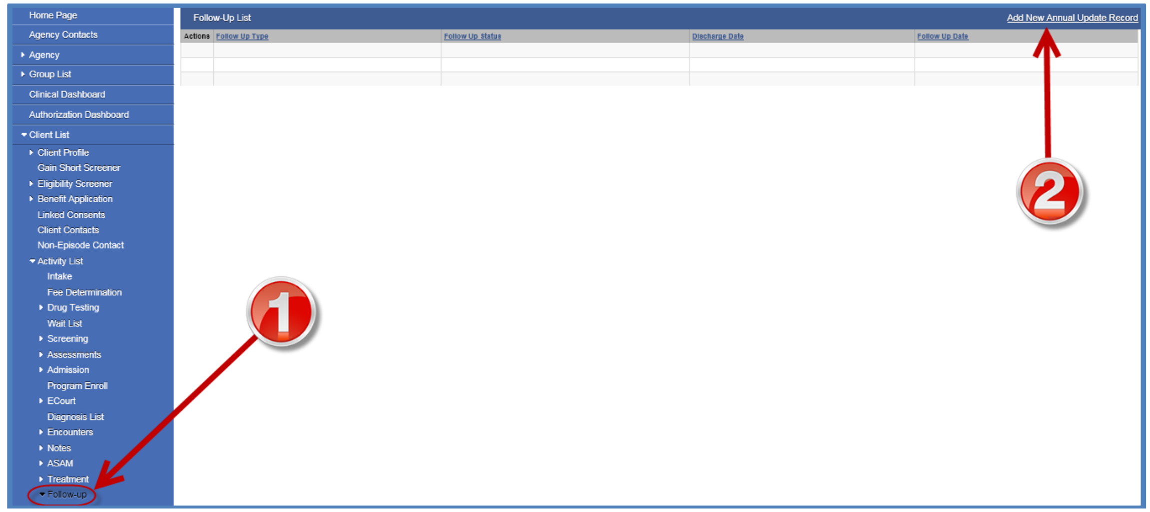

3. Select the program **Follow Up**. Enter **Days on Wait List**.

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

## Complete the Follow Up Survey

1. Click **Follow Up**.

2. Click **Add New Annual Update Record**.



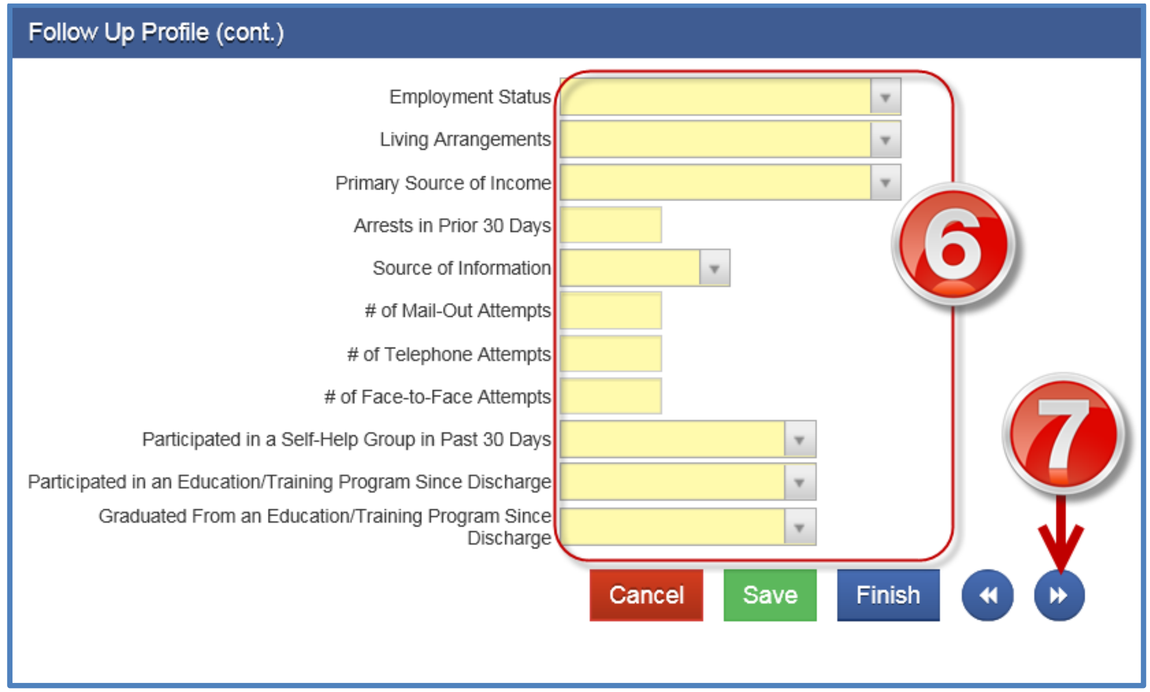

3. Select the Follow Up Type of **30 Day, or 6 month, or 12 month**. Select the type of **Health Insurance** for the client and select the **Follow Up Status**.

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

5. Click .

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.

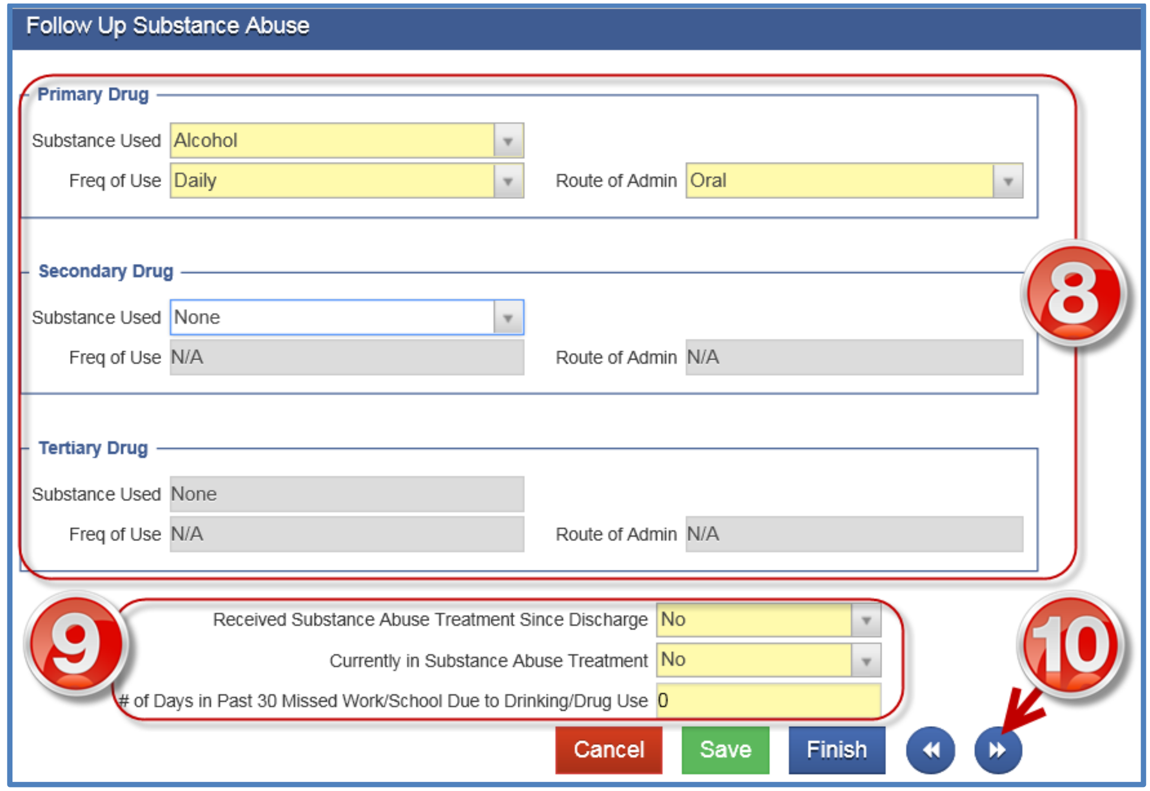
7. Click .



**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**.

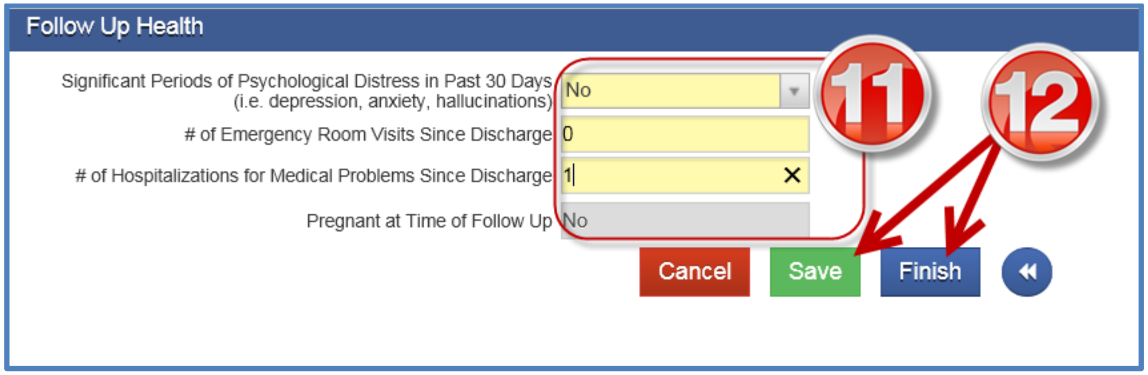
**10.** Click  .



**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**.

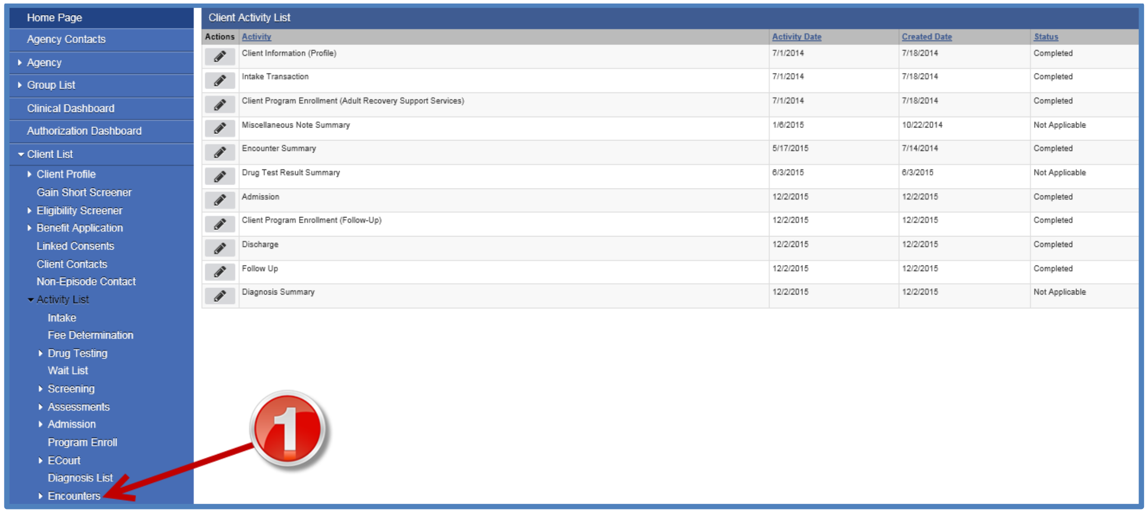
**12.** Click **Save** and **Finish**.

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

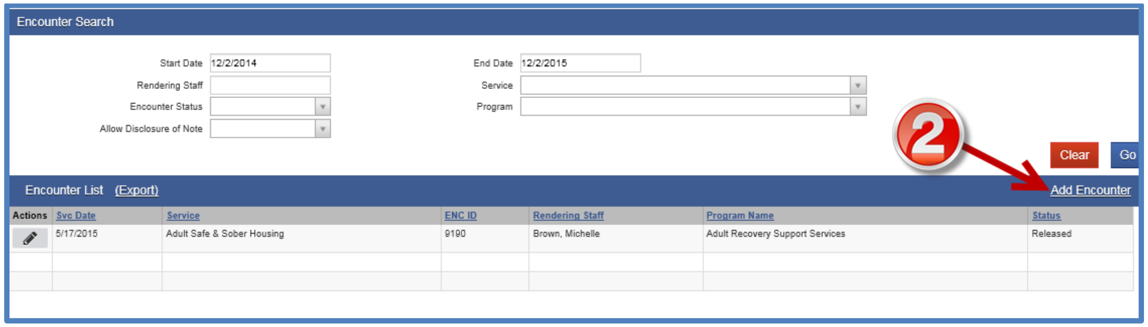


## Bill Follow Up Survey (Create an Encounter)

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

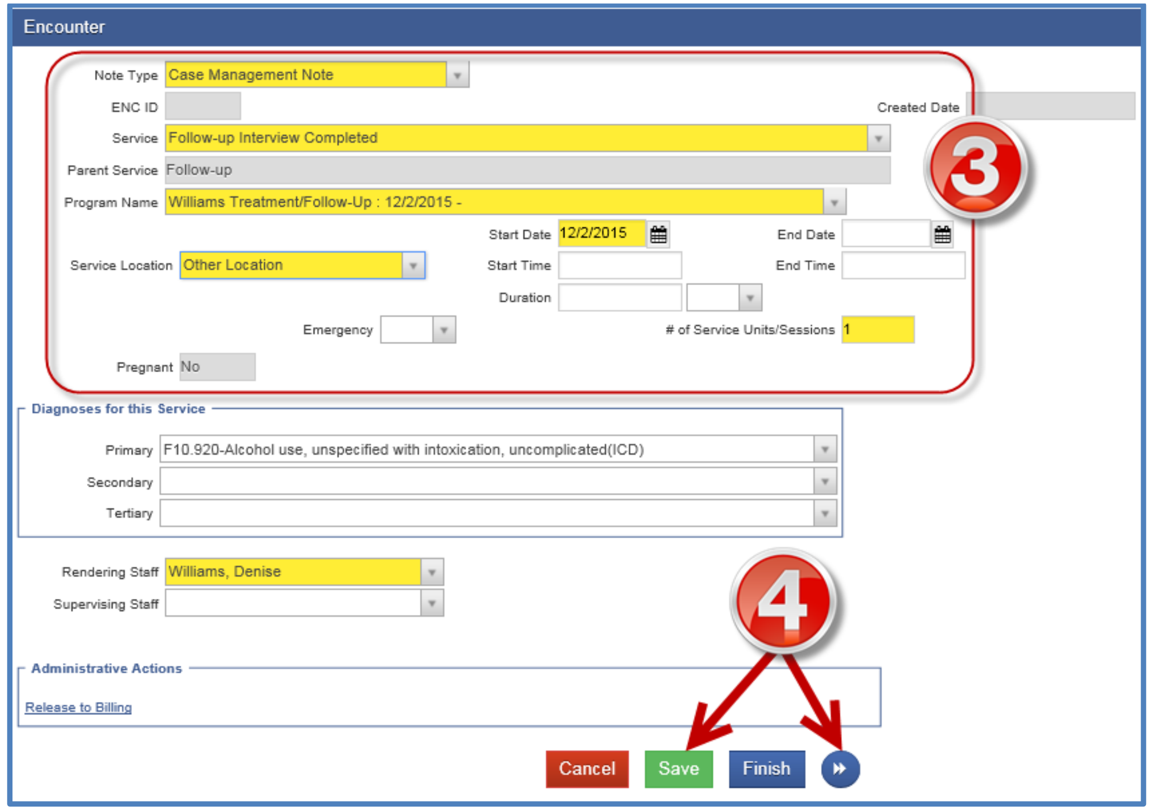


2. Click **Add Encounter**.



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

4. Click Save and  .

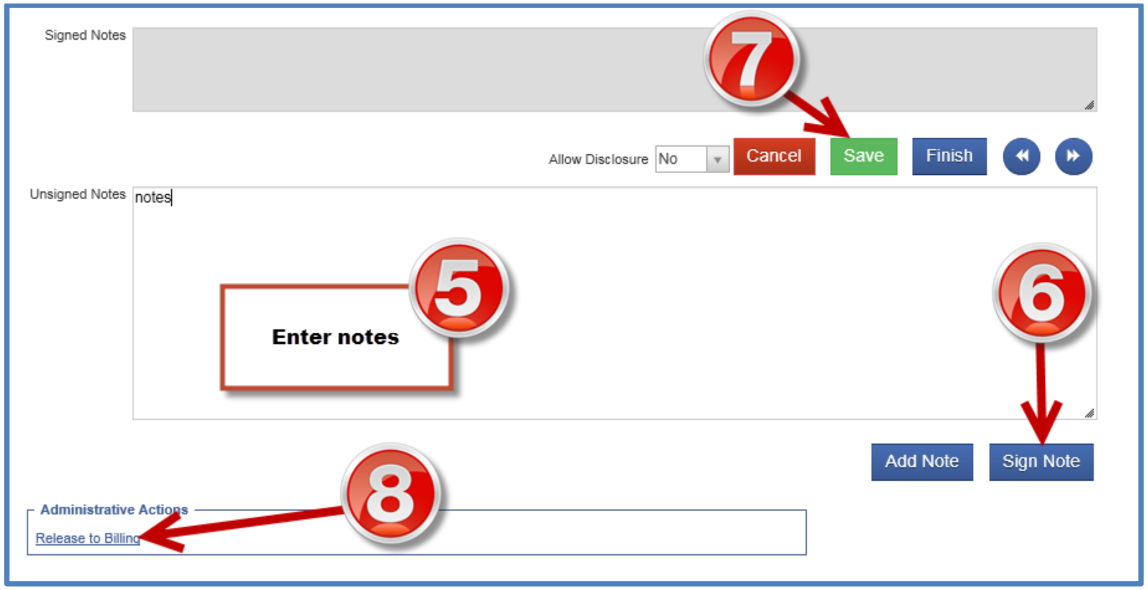


5. **Enter a note** in the Unsigned Note section.

6. Click **Sign Note**.

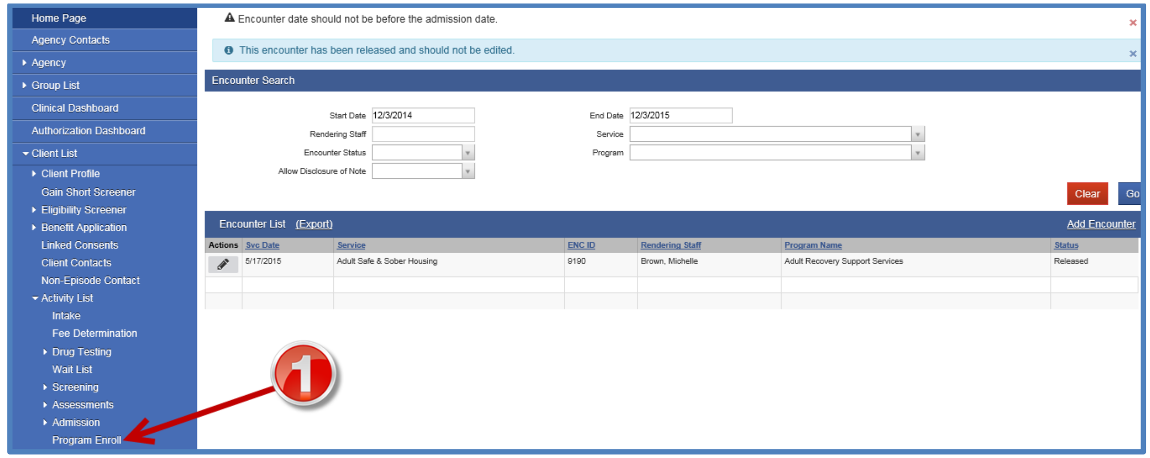
7. Click **Save**.

8. Click **Release to Billing**.

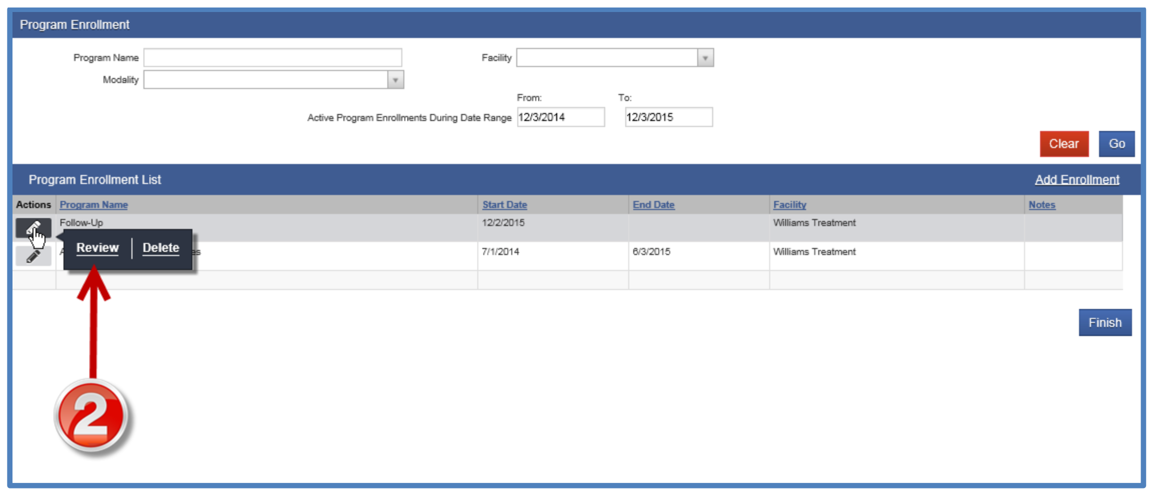


# Close the Follow Up Program Enrollment

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

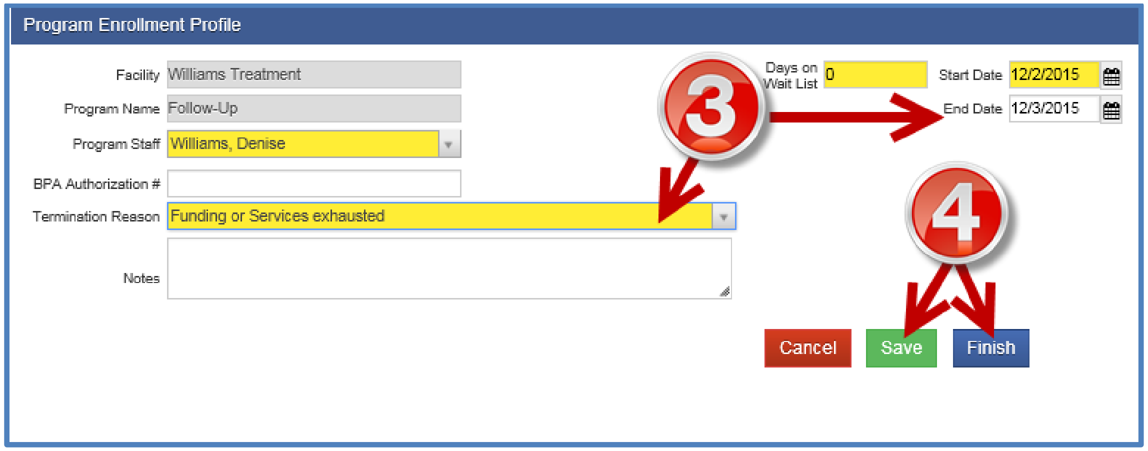



2. Click **Review** for the Follow Up program.



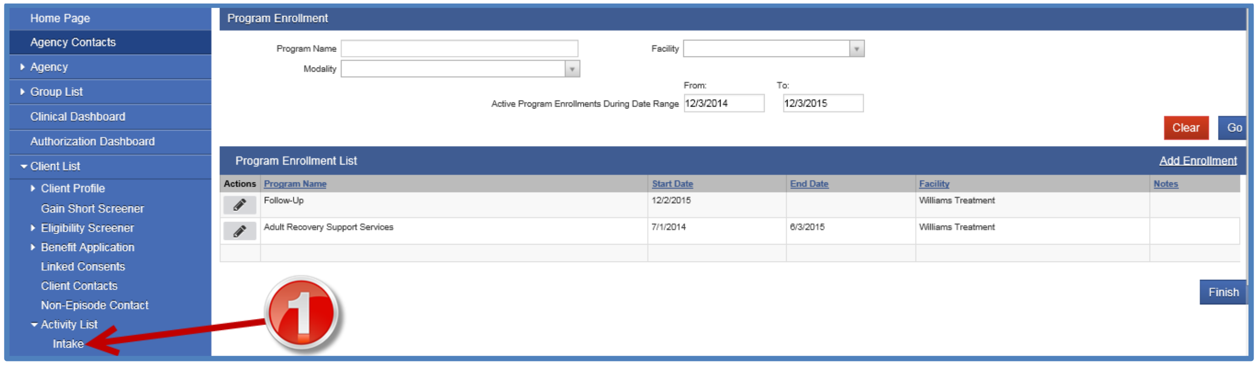
**3.** Enter the **End Date** and select a **Termination Reason**.

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



## Close the Intake

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



2. Enter the **Date Closed** and click **Save & Close the Case**.

3. The record will become read-only. Click **Finish**.