

## WITS Changes – 18.10.2 Release MH

07/25/2016

In the 18.10.2 4 bugs were repaired in WITS. Below are a summary of the errors and the resolutions of the problems.

Issue	Resolution
<b>GAIN: Clients with newly downloaded GAIN Summaries have previously completed intakes listed as "In Progress"</b>	GAIN: The issue with Intake status when downloading a GAIN-I Summary (GRRS) report is resolved, previously completed Intakes won't be set back to "In Progress" status again after the GRRS report is downloaded and updated in WITS.
<b>Follow-Up: Yellow screen error when user clicks "Save" or "Finish"</b>	ID - Follow-Up: Fixed a yellow screen error that occurred when saving a Follow up record.
<b>Consent/Eligibility Screener: "Disclosed to Agency" is blank</b>	Consent/Eligibility Screener - ID: "Payor Plan Groups" box populates all the available plans based on the Eligibility screener date. Meanwhile, "Disclosed to Agency" dropdown is filled with the appropriate agencies on Consent screen.
<b>Referral: New duplicate client check screen causes problems (ID)</b>	Referral: Resolved issues that occurred while accepting a referral on the duplicate client check screen.

Below you will find a summary of the change to WITS for the 18.10.2 release (which took place 7/25/2016). When these changes are made in Idaho-Mountain and Idaho-Pacific, the top left portion of your screen will say 18.10.2.

## Duplicate Client Check

**Purpose: When creating a new Client Profile or accepting a Referral, WITS will search all Regions for clients with:**

- First 3 characters of first name, first 3 characters of last name, and year of birth and will exclude clients with first or last name with less than 3 characters.  
OR
- First character of first name and last 4 numbers of SSN (excluding SSN = 0000)  
OR
- Soundex\* of first name, Soundex of last name, and year of birth  
OR

- Soundex of first name and last 4 numbers of SSN (excluding SSN = 0000)

What does this mean when I am accepting a referral?

- You no longer need to link a consent from another Region to an existing client in your Region.
  - Receive a referral in the status of pending. Change the status to placed accepted and click save. A list of similar clients will display.
  - If you select a similar client from the list, the most recently updated Client Profile will be created in your agency.
  - If You click Yes, a new client profile will be created.
  - If you click No, the referral will stay in a status of pending.

What does this mean when I am creating a new client?

- When creating a new client profile and you click save, a list of similar clients will display.
  - If you select a similar client from the list, the most recently updated Client Profile will be created in your Region.
  - If You click Yes, a new client profile will be created.
  - If you click No, a new client profile will not be created.

**Note: When completing a designated examination (DE), enter the record into WITS according to the region where the clinician is assigned, not in the region where the client lives/receives services.** For example: Clinician Sally is located in Region 2, but is helping Region 1 by performing a DE for a client located in Region 1. Sally will enter the DE into WITS in Region 2.

## Accepting a Referral

1. Getting here: Login, click **Agency, Referrals, Referrals In** on the Navigation Pane (left menu).
2. Enter the search criteria.

3. Click .

4. Hover over  under Actions and click **Review**.

User: A. Clinical Supervisor | Location: IDHW, DBH, Region 6, Pocatello | Snapshot

Home Page  
Agency Contacts  
Agency  
Agency List  
Aliases  
Contacts  
Referrals  
Referrals  
Authorizations  
Referrals Out  
Wait List  
Health Information Mgmt  
Vendor Management  
Clinical Dashboard  
Client List

Referrals In Search

Referral Status Codes  
Placed/Accepted  
Referral Created/Pending  
Referral Terminated  
Refused Treatment

Search Criteria

Unique Client Number  
Created Date  
Referred Date

First Name  
Last Name da\*

Clear Go

Referrals for Pocatello (Export)

Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments

Referrals In Search

Referral Status Codes  
Placed/Accepted  
Referral Terminated  
Refused Treatment  
Rejected by Program

Search Criteria  
Referral Created/Pending

Unique Client Number  
Created Date  
Referred Date

First Name  
Last Name da\*

Clear Go

Referrals for Pocatello (Export)

Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
	209151880000180	Dae, Sumr	9/15/1988	7/1/2016	IDHW, DBH, Region 2/Lewiston	Assessment	Referral Created/Pending	Pocatello	

5. Update the Appointment Date and Status if appropriate.

6. Change the Referral Status to **Placed Accepted**.

7. Click .

8. A list of similar clients displays. Click **Select** if one of the clients displayed matches your client.

What if none of the clients listed is my client?

- Click **Yes** to continue and create a new Client Profile.
- OR
- Click **No** to cancel the creation of the Client Profile.

on: IDHW, DBH, Region 6, Pocatello

Client: Dae, Sumr | 20915188000019U

**Referral**

**Referred By**

Agency: IDHW, DBH, Region 2  
 Facility: Lewiston  
 Staff Member: Buskey, Michelle, test  
 Program: Lewiston/Assessment : 6/16/2016 -  
 State Reporting Category:  
 Reason: Client requested referral  
 If Other:  
 Is Consent Verification Required? Yes  
 Is Consent Verified? Yes  
 Continue This Episode of Care? Yes

**Referred To**

Signed Consents: IDHW, DBH, Region 6  
 Agency: IDHW, DBH, Region 6  
 Facility: Pocatello  
 Staff Member:  
 Program: Assessment (-103)  
 State Reporting Category:  
 Non-System Agency:  
 Non-System Modality:  
 Non-System Specifier:  
 Appt Date: Undetermined

Consents Granted:  
 Consent Date: 6/15/2016  
 Disclosure Domains:  
 Client Information (Profile) (DS, 7/31/2016)  
 Intake Transaction (DS, 7/31/2016)

Comments:  
 Referral Status: Referral Created/Pending  
 Referral Date: 7/1/2016  
 Projected End Date:  
 Created Date: 7/1/2016 6:45 PM

Cancel Finish

Similar Clients already exist in the System and are listed below. Do you wish to continue inserting this client record? Click "Yes" to continue to Add the record or "No" to Cancel the creation of the new record. The Select Action will take you to the record of the duplicate client.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	20815188000019U	Day, Summer	8/15/1988	000-00-0000	Female
	<b>Select</b> 20915188000019U	Dae, Sumr	9/15/1988	000-00-0000	Female

Yes No

9. A Client Profile with information from the selected client will be created in your region, including:
- Client Name & other demographic information
  - Alternate Names (if any)
  - Additional Information
  - Contact Information, including all addresses
  - Allergies (if any)
  - Benefit Application (if any).

10. Click  .

**Client:** Day, Summer | 20815188000019U Clear Client

### Profile

First Name	Summer	Provider Client ID	
Middle Name		Unique Client Number	20815188000019U
Last Name	Day	State Client ID	
Suffix		Record Created By	Buskey, Michelle
Gender	Female	Last Updated By	Buskey, Michelle
DOB	8/15/1988	Created Date	7/1/2016 5:46 PM
SSN	000-00-0000	Last Updated Date	7/1/2016 5:46 PM
		Date of Death	
Driver's License			
Access Category	Adult		
Has paper file			

Administrative Actions Download c32 View c32

Cancel Save Finish ▶

### Alternate Names

Actions	Last Name	First Name	Middle Name	Client Alias Type
		Sunny		Nickname

### Addresses

Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	123 A Street Melba, ID 84512	No	7/1/2016	7/1/2016
	Client Mailing	PO Box 123	No	7/1/2016	7/1/2016

## Creating a Client Profile

1. Getting here: Login, click **Client List** on the Navigation Pane (left menu). **Search for the client.** If you are unable to find the client, click **Add Client**.

**Note: When completing a designated examination (DE), enter the record into WITS according to the region where the clinician is assigned, not in the region where the client lives/receives services.**

- **Example:** Clinician Sally is located in Region 2, but is helping Region 1 by performing a DE for a client located in Region 1. Sally will enter the DE into WITS in Region 2.

Client Search

Agency	IDHW, DBH, Region 6	Facility	
First Name		Last Name	
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		Number Type	
Include Only Active Consents	Yes		

[Clear](#) [Go](#)

Client List [\(Export\)](#) [Add Client](#)

Actions	Unique Client #	Full Name	DOB	SSN	Gender

Clients with Consents from Outside Agencies

Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender

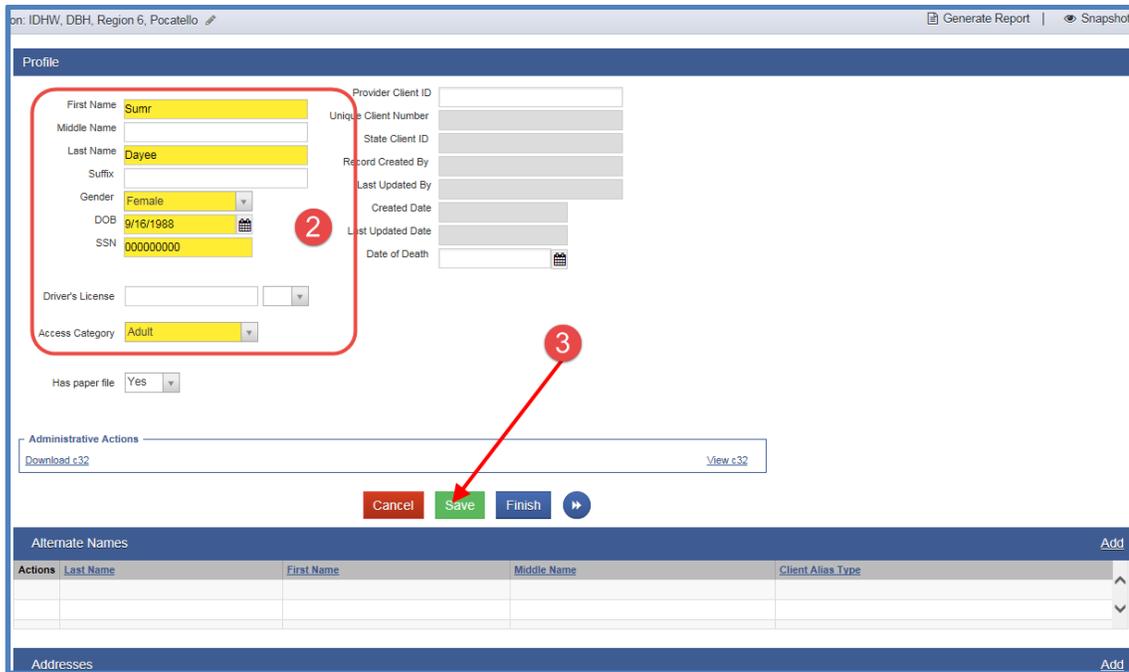
## 2. Complete all required (yellow) fields.

3. Click .

4. A list of similar clients displays. Click Select if one of the clients displayed matches your client.

### What if none of the clients listed is my client?

- Click  to continue and create a new Client Profile.
- OR
- Click  to cancel the creation of a Client Profile.



on: IDHW, DBH, Region 6, Pocatello Generate Report Snapshot

Profile

First Name  Middle Name  Last Name  Suffix  Gender  DOB  SSN  2

Provider Client ID  Unique Client Number  State Client ID  Record Created By  Last Updated By  Created Date  Last Updated Date  Date of Death

Driver's License

Access Category

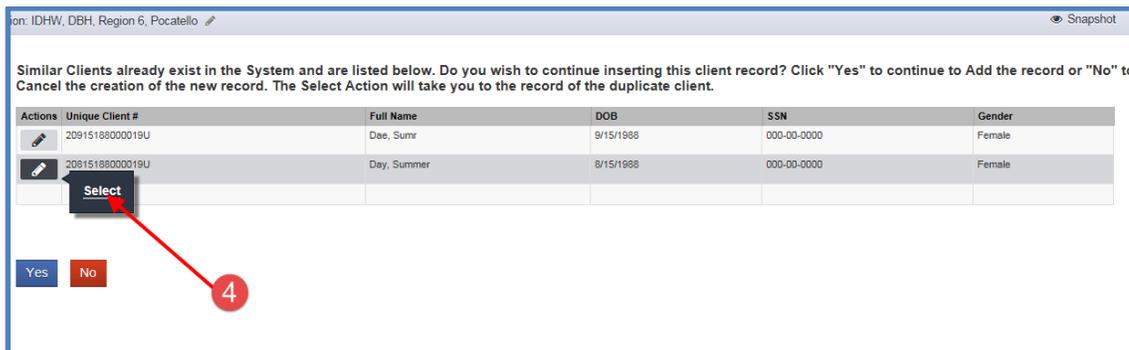
Has paper file

Administrative Actions

Alternate Names Add

Actions	Last Name	First Name	Middle Name	Client Alias Type

Addresses Add



on: IDHW, DBH, Region 6, Pocatello Snapshot

Similar Clients already exist in the System and are listed below. Do you wish to continue inserting this client record? Click "Yes" to continue to Add the record or "No" to Cancel the creation of the new record. The Select Action will take you to the record of the duplicate client.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
<input type="button" value="Select"/>	20915188000019U	Dae, Sumr	9/15/1988	000-00-0000	Female
<input type="button" value="Select"/>	20815188000019U	Day, Summer	8/15/1988	000-00-0000	Female

4

5. A Client Profile with information from the selected client will be created in your region, including:

- Client Name & other demographic information
- Alternate Names (if any)
- Additional Information
- Contact Information, including all addresses
- Allergies (if any)
- Benefit Application (if any).

6. Click  .

**Client:** Day, Summer | 20815188000019U Clear Client

### Profile

First Name	Summer	Provider Client ID	
Middle Name		Unique Client Number	20815188000019U
Last Name	Day	State Client ID	
Suffix		Record Created By	Buskey, Michelle
Gender	Female	Last Updated By	Buskey, Michelle
DOB	8/15/1988	Created Date	7/1/2016 5:46 PM
SSN	000-00-0000	Last Updated Date	7/1/2016 5:46 PM
Driver's License		Date of Death	
Access Category	Adult		
Has paper file			

**Administrative Actions** [Download c32](#) [View c32](#)

Cancel Save Finish ▶

### Alternate Names

Actions	Last Name	First Name	Middle Name	Client Alias Type
		Sunny		Nickname

### Addresses

Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	123 A Street Melba, ID 84512	No	7/1/2016	7/1/2016
	Client Mailing	PO Box 123	No	7/1/2016	7/1/2016