Behavioral Health Community Crisis Center Electronic Manual (eManual)

Welcome to Idaho WITS!

Idaho WITS is a secure HIPAA and CRF42 compliant web-based Electronic Health Record (EHR) system for contracted Behavioral Health Community Crisis Centers (BHCCCC).

How to use this electronic manual.

Click on the links on the left navigation bar for each topic.

Print any topic you are currently viewing by clicking the Print icon in the upper right corner of the page.

How to Get Access to WITS

If you are a new staff member at a Behavioral Health Community Crisis Center (BHCCC), print and sign the BHCC Idaho WITS User Agreement and contact your Agency WITS Administrator.

If you are a new contracted Behavioral Health Community Crisis Center (BHCCC), complete the BHCCC Agency Set-Up Packet and submit it via email to the WITS Help Desk at dbhwitshd@dhw.idaho.gov.

Computer and Internet Settings for WITS

Internet Browser

The only fully supported browser for WITS is Internet Explorer version 11. Browsers like Chrome, Safari, Edge, or Firefox are not supported by WITS and will not work correctly.

Programs

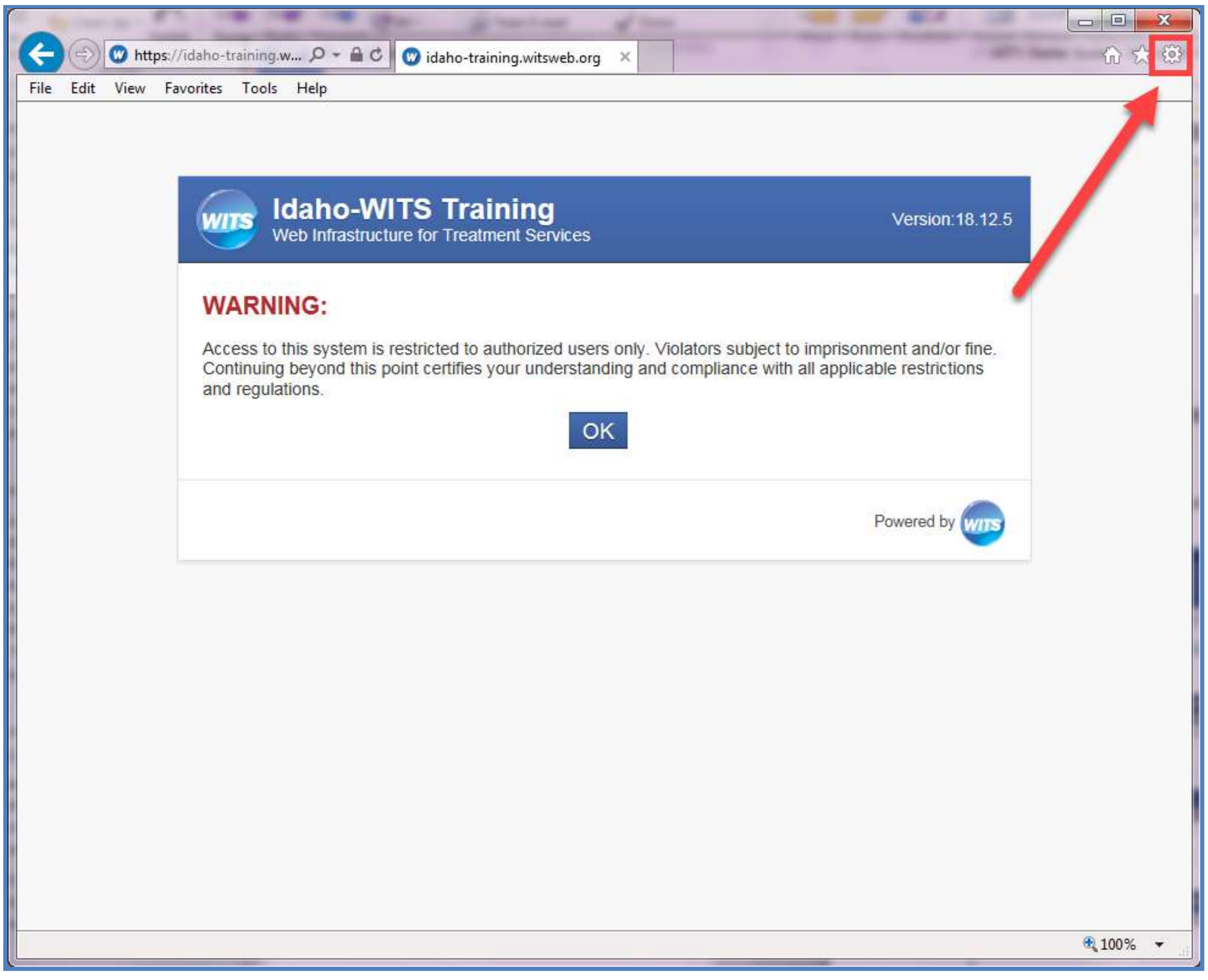
Printable reports in WITS may require the program Adobe Acrobat Reader.

In order for WITS to run correctly on your computer you may need to update your Safe Sites and Clear your Cache. These steps are required when you log in for the first time from a new computer.

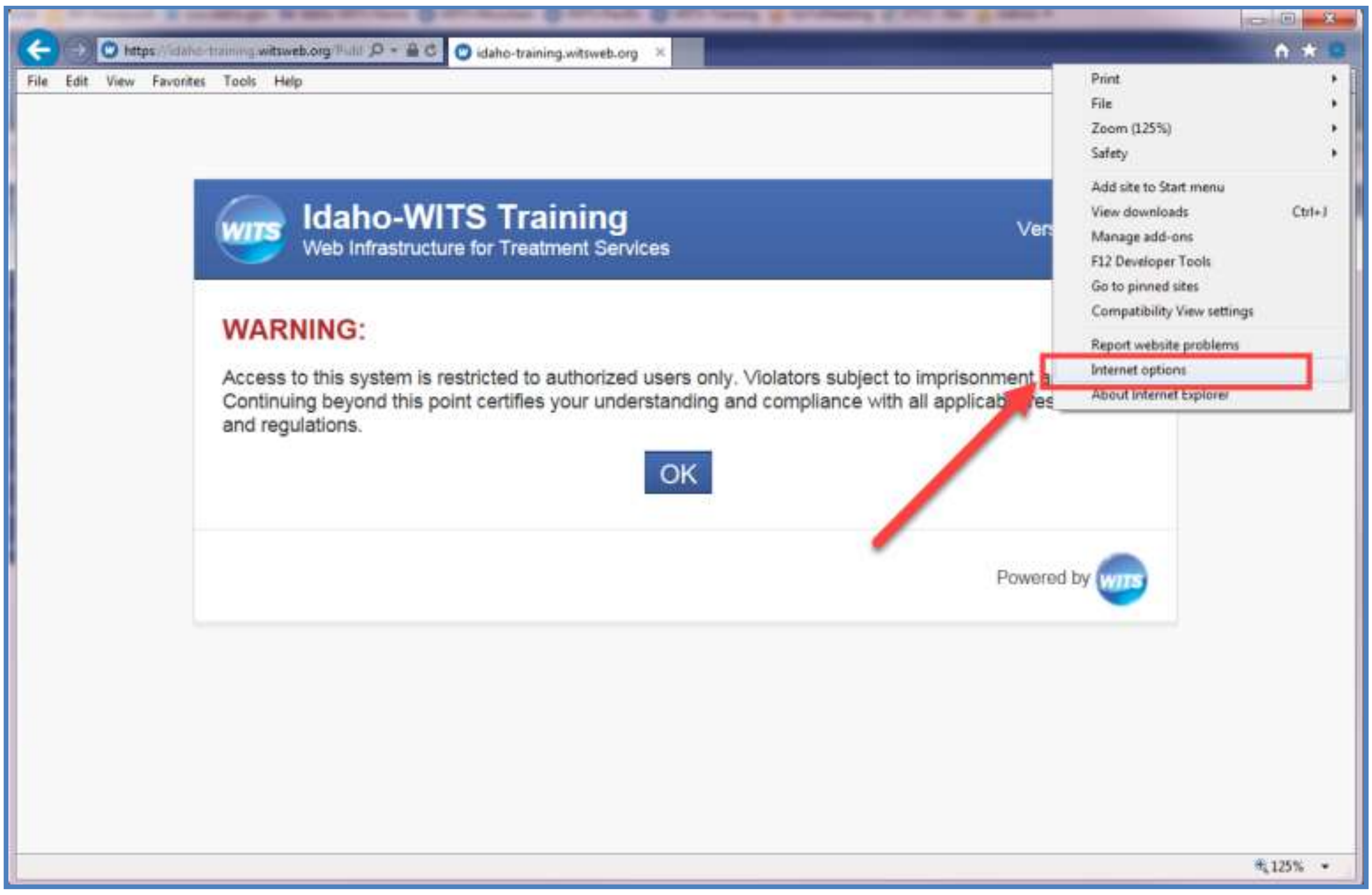
Follow the links below for instructions on how to update your Safe Sites and Clear your Cache.

Safe Sites

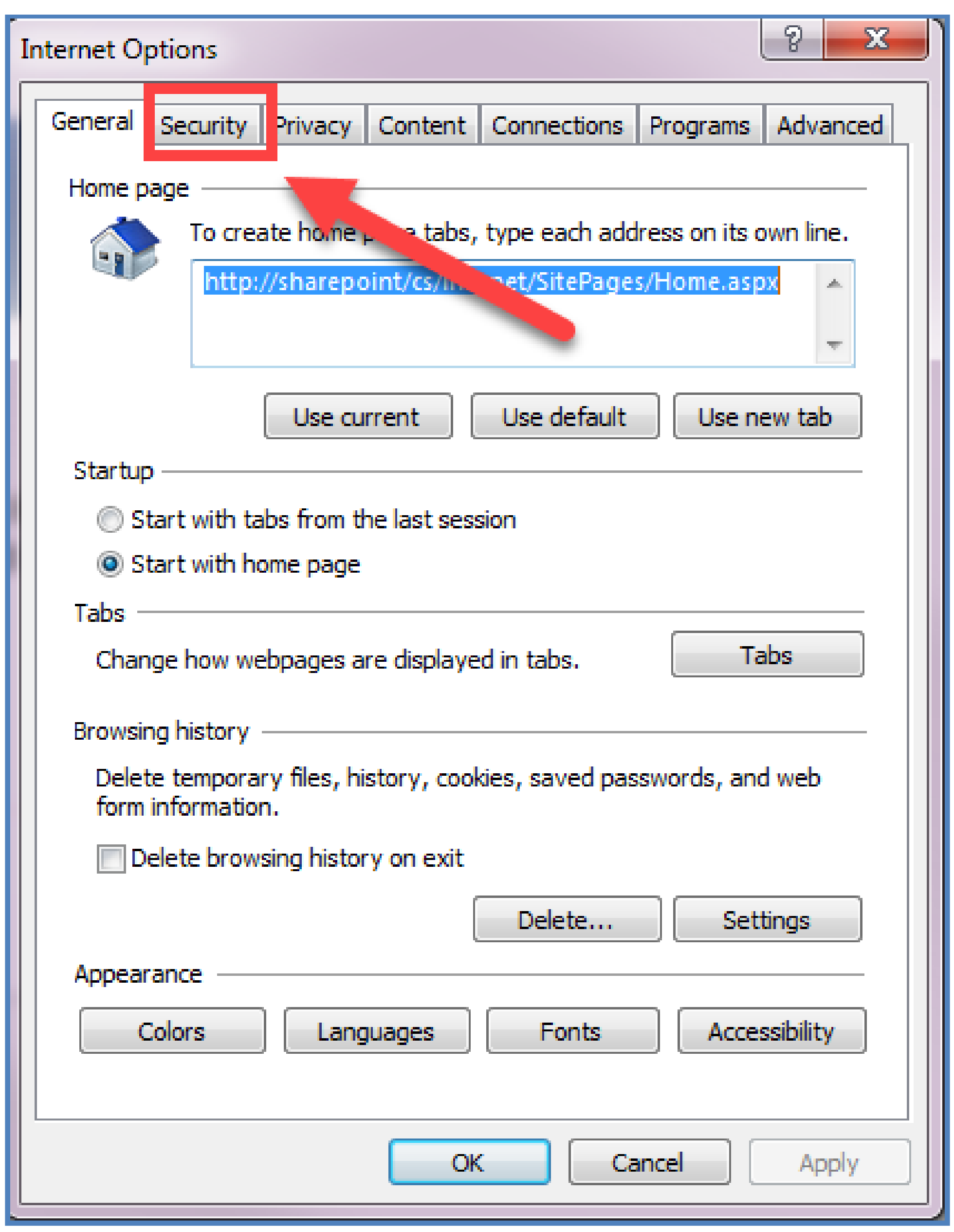
1. Begin by opening Internet Explorer 11.



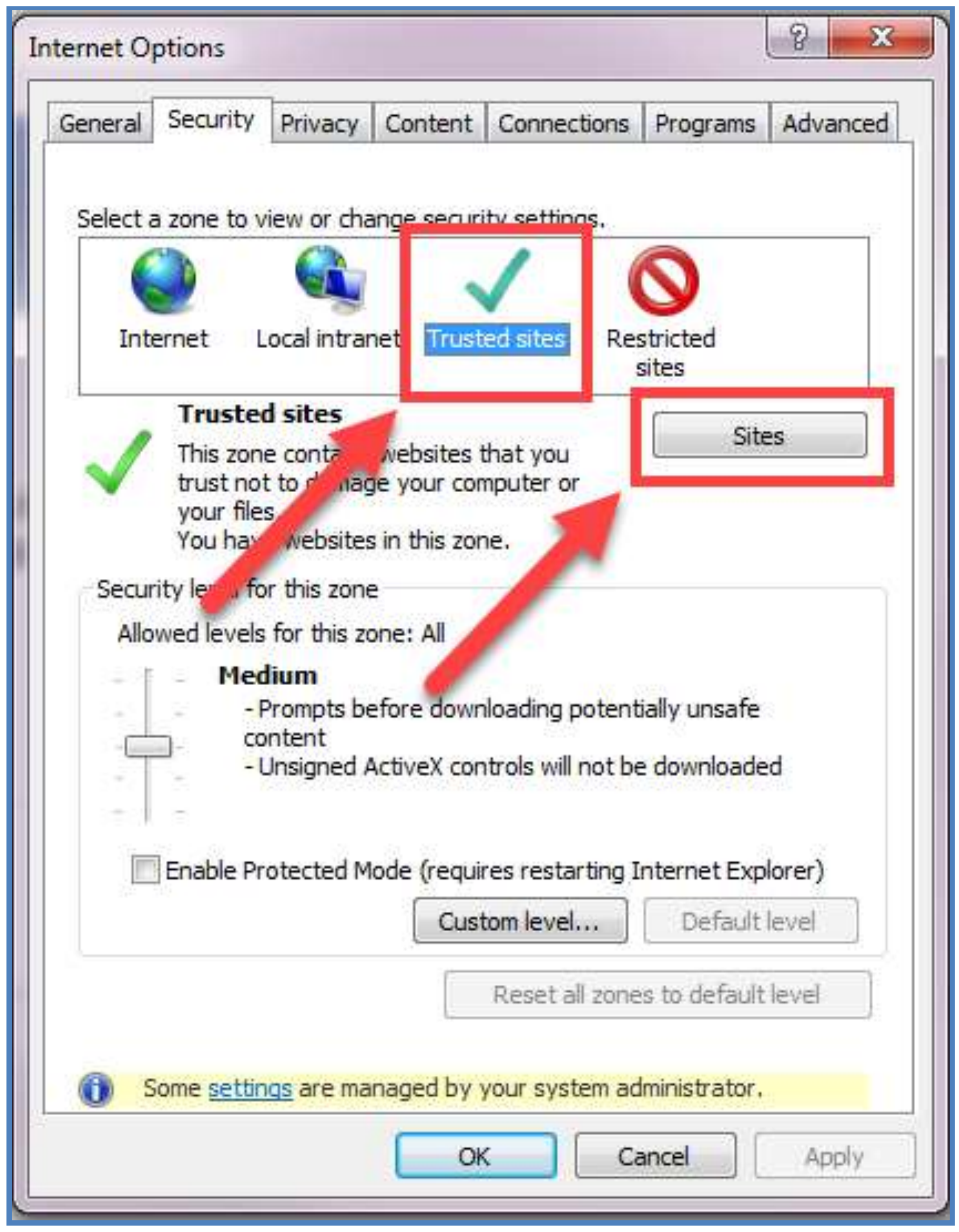
2. Click .



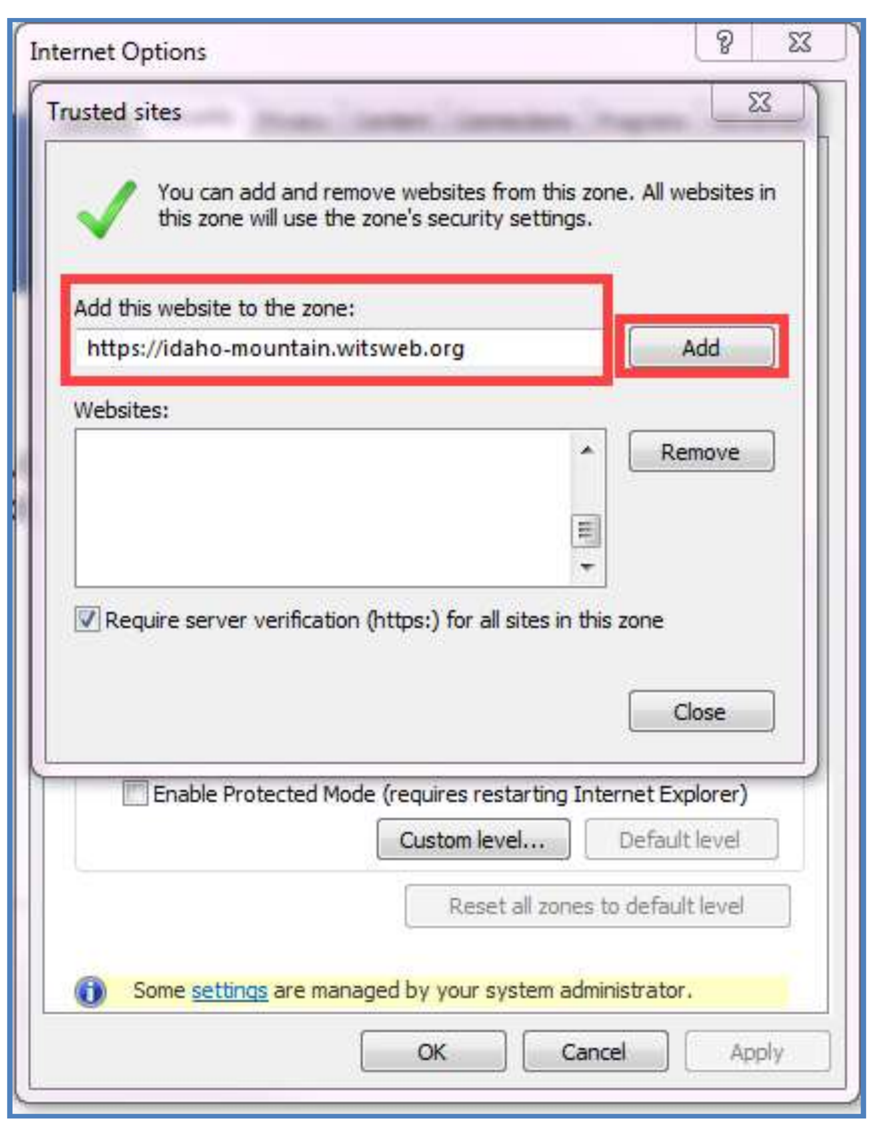
3. Click Internet options.



4. Click Security.



5. Click Trusted sites (Trusted Sites) and click Sites.



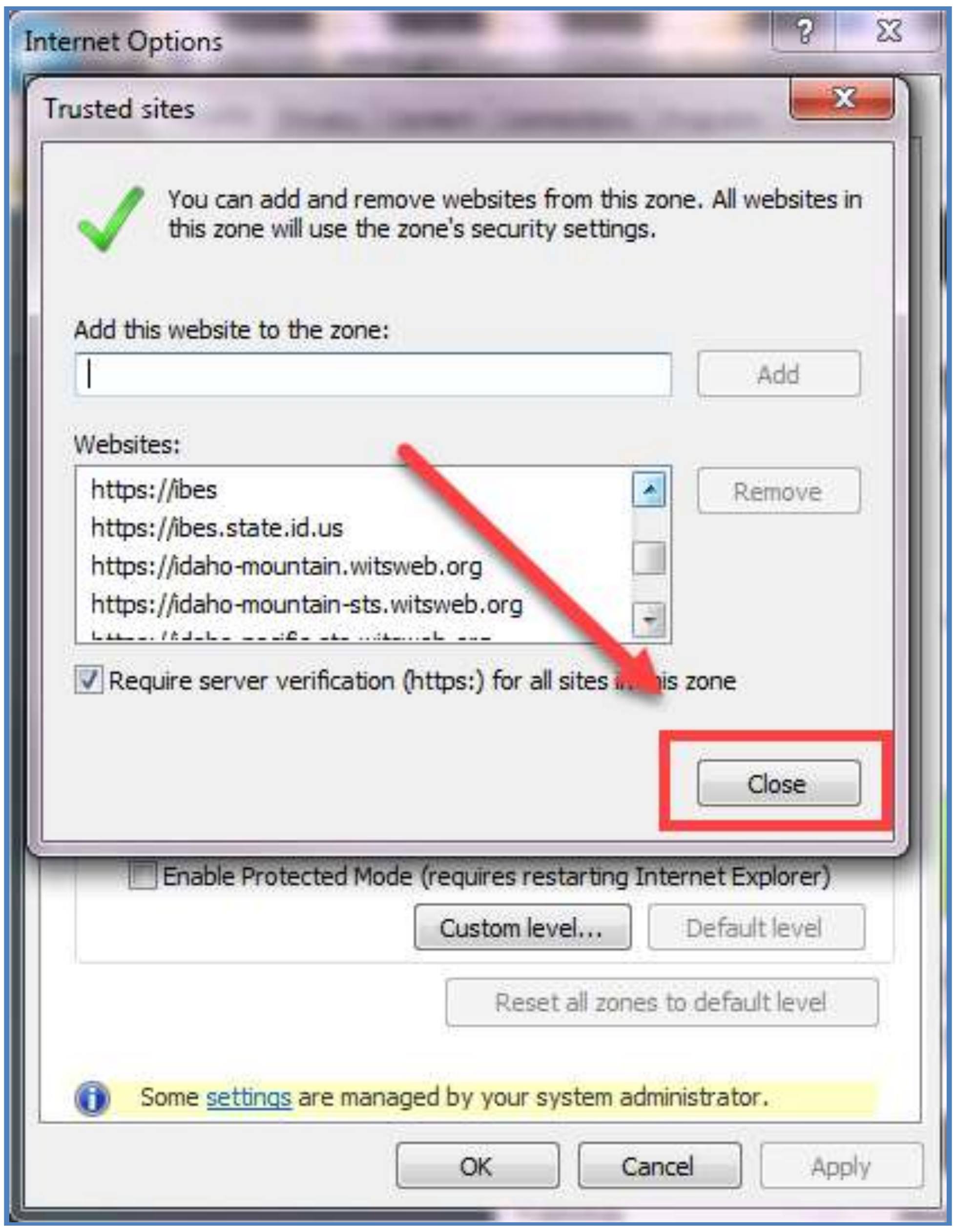
6. Enter each of the websites listed below individually into the field Add this website to the zone: and click Add.

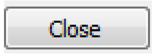
Users should add either the Mountain or the Pacific site as Trusted Sites. <u>Do not add both Mountain and Pacific as Trusted Sites.</u>

If you are in the Mountain Time Zone add the following sites:
https://idaho-mountain-sts.witsweb.org
https://idaho-mountain.witsweb.org

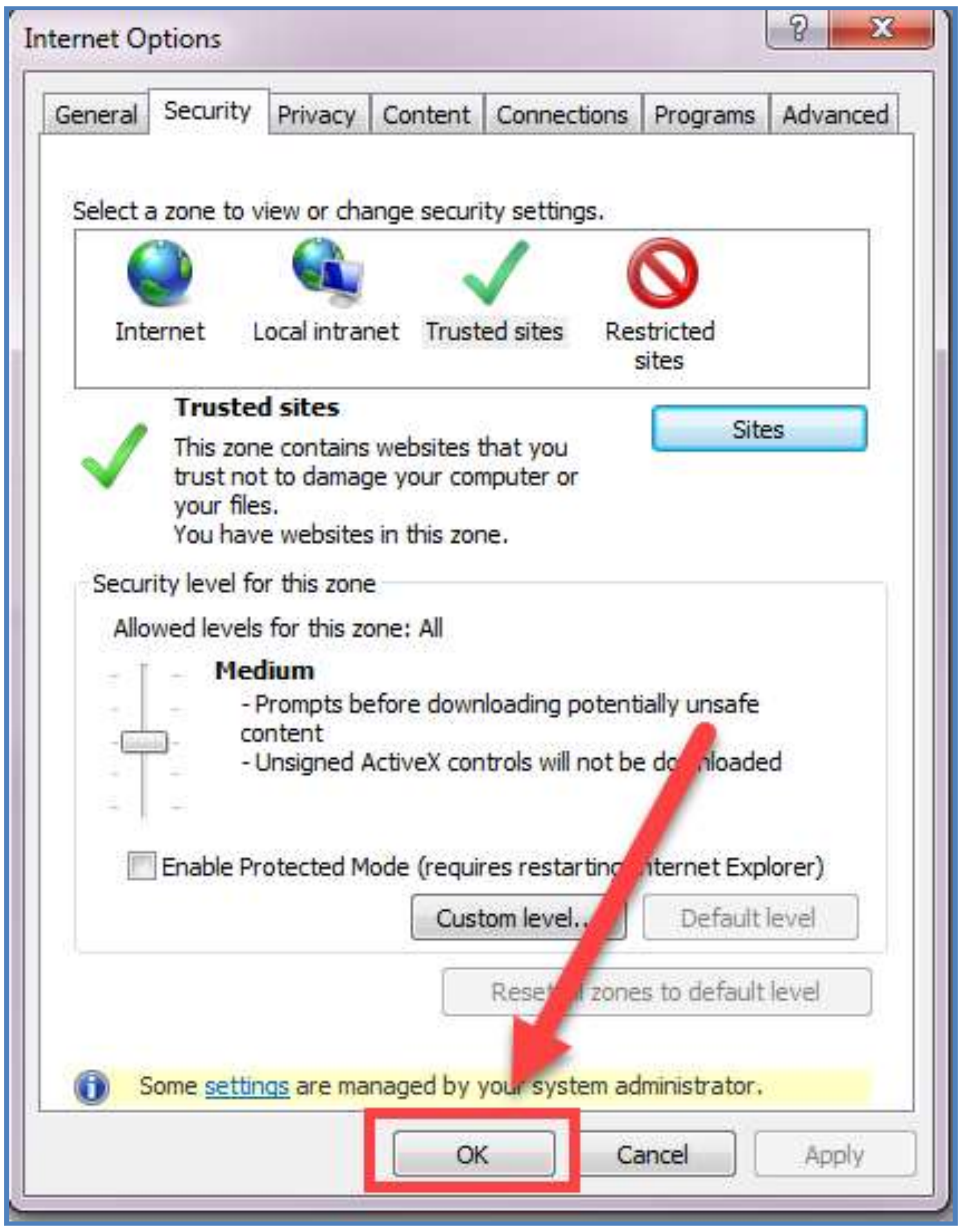
OR

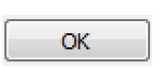
If you are in the Pacific Time Zone add the following sites:
https://idaho-pacific-sts.witsweb.org
https://idaho-pacific.witsweb.org



7. Click 

.



8. Click 

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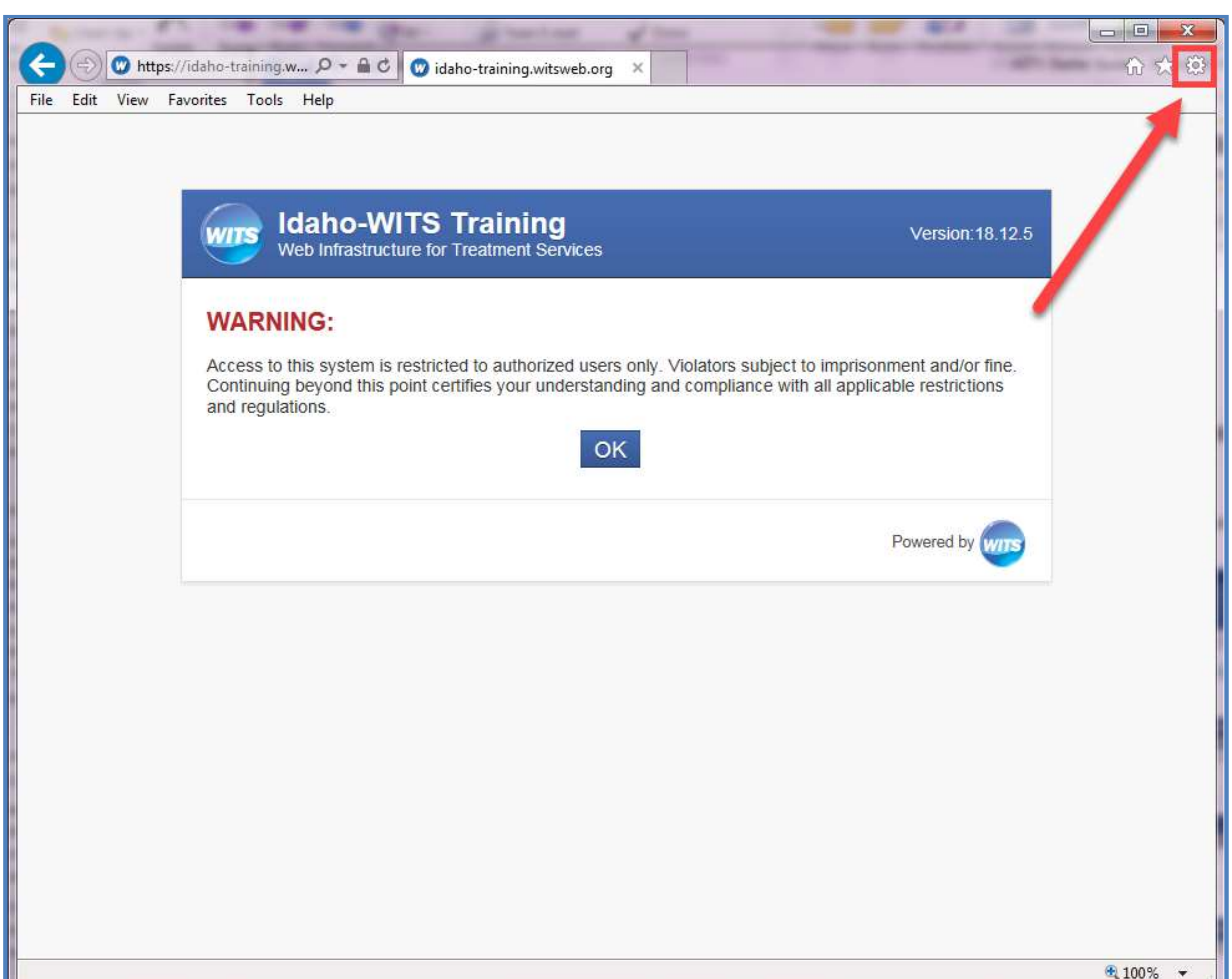
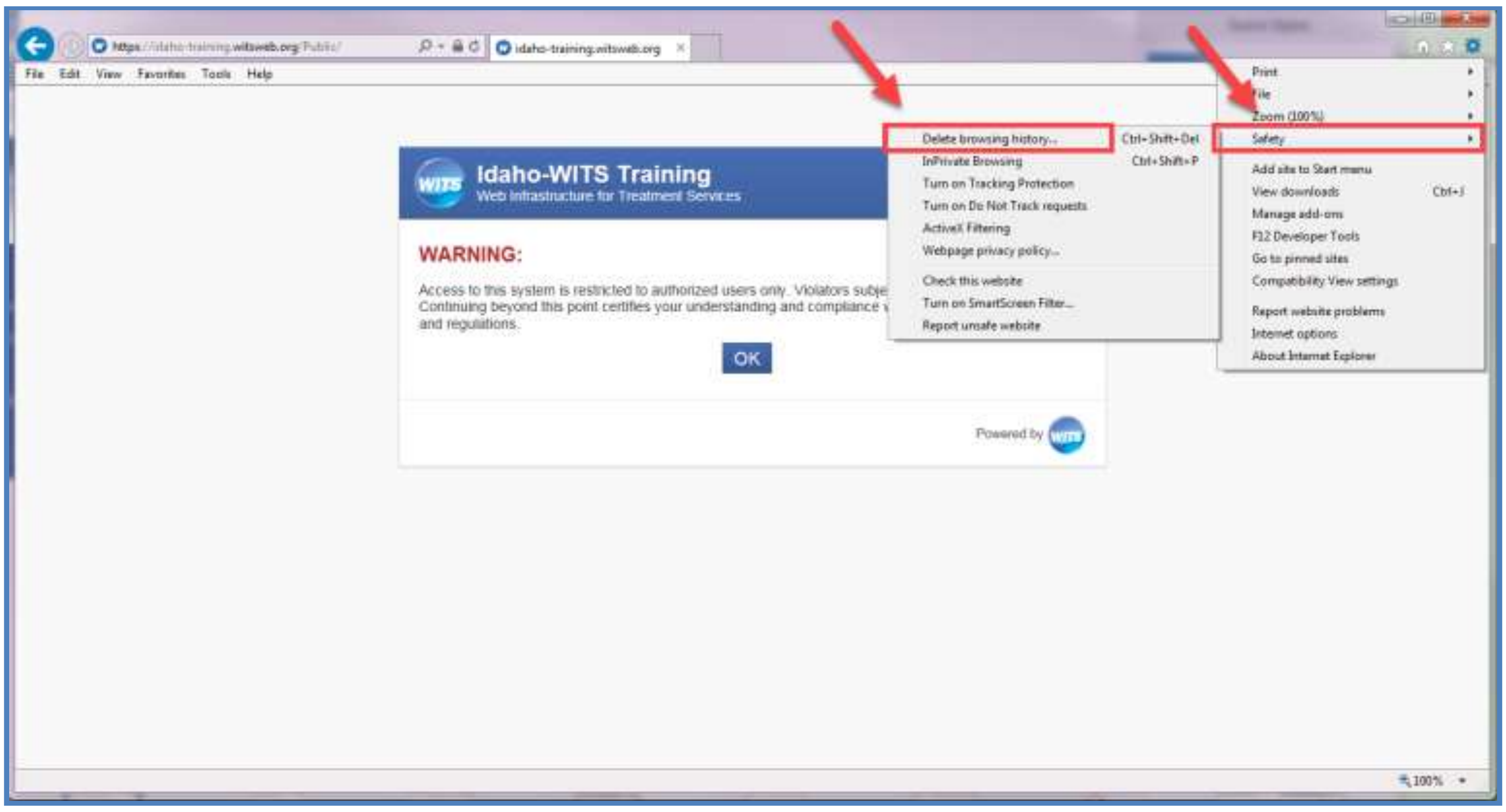
Clearing your Cache

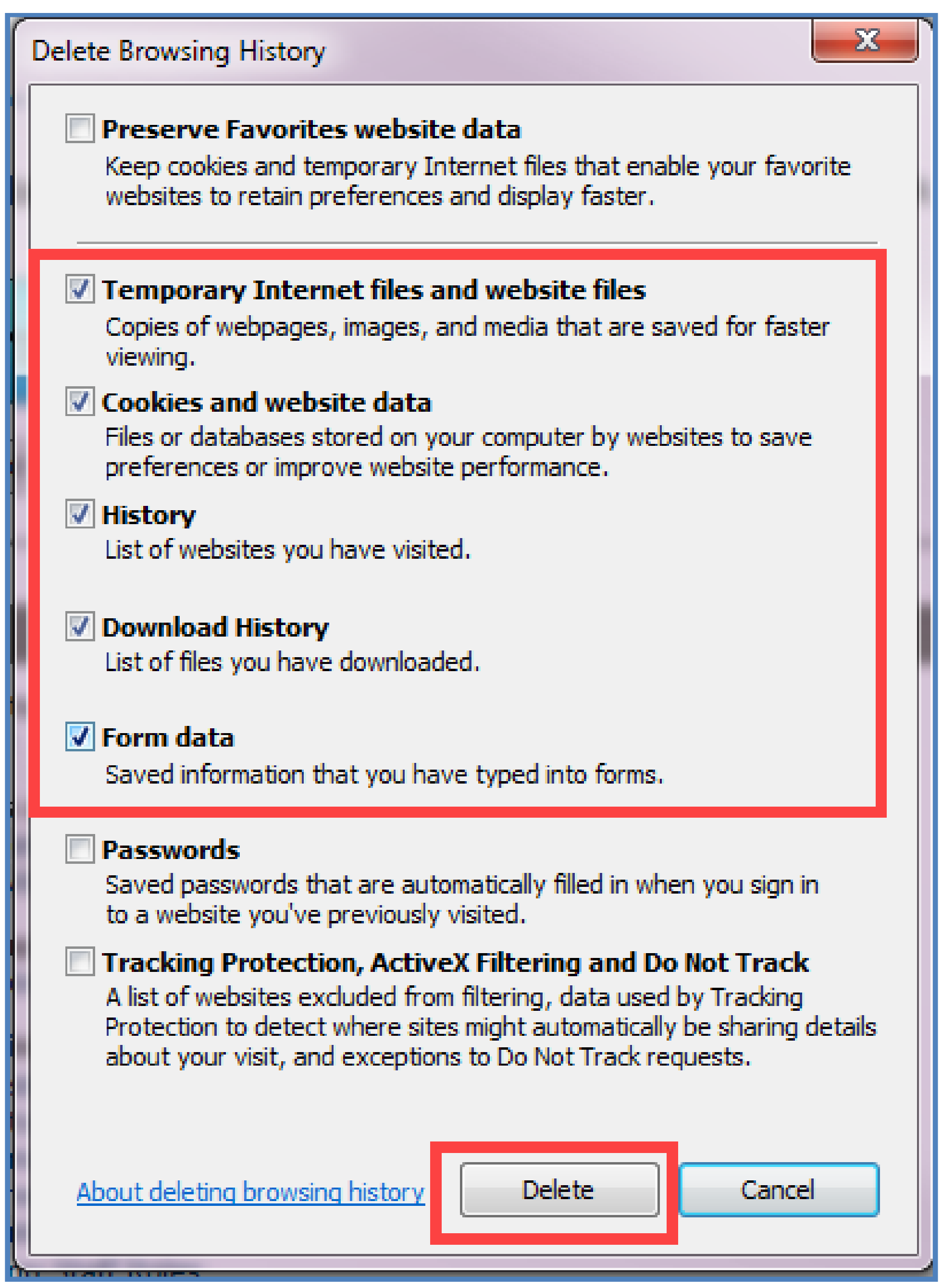
1. Begin by opening Internet Explorer 11.



2. Click .

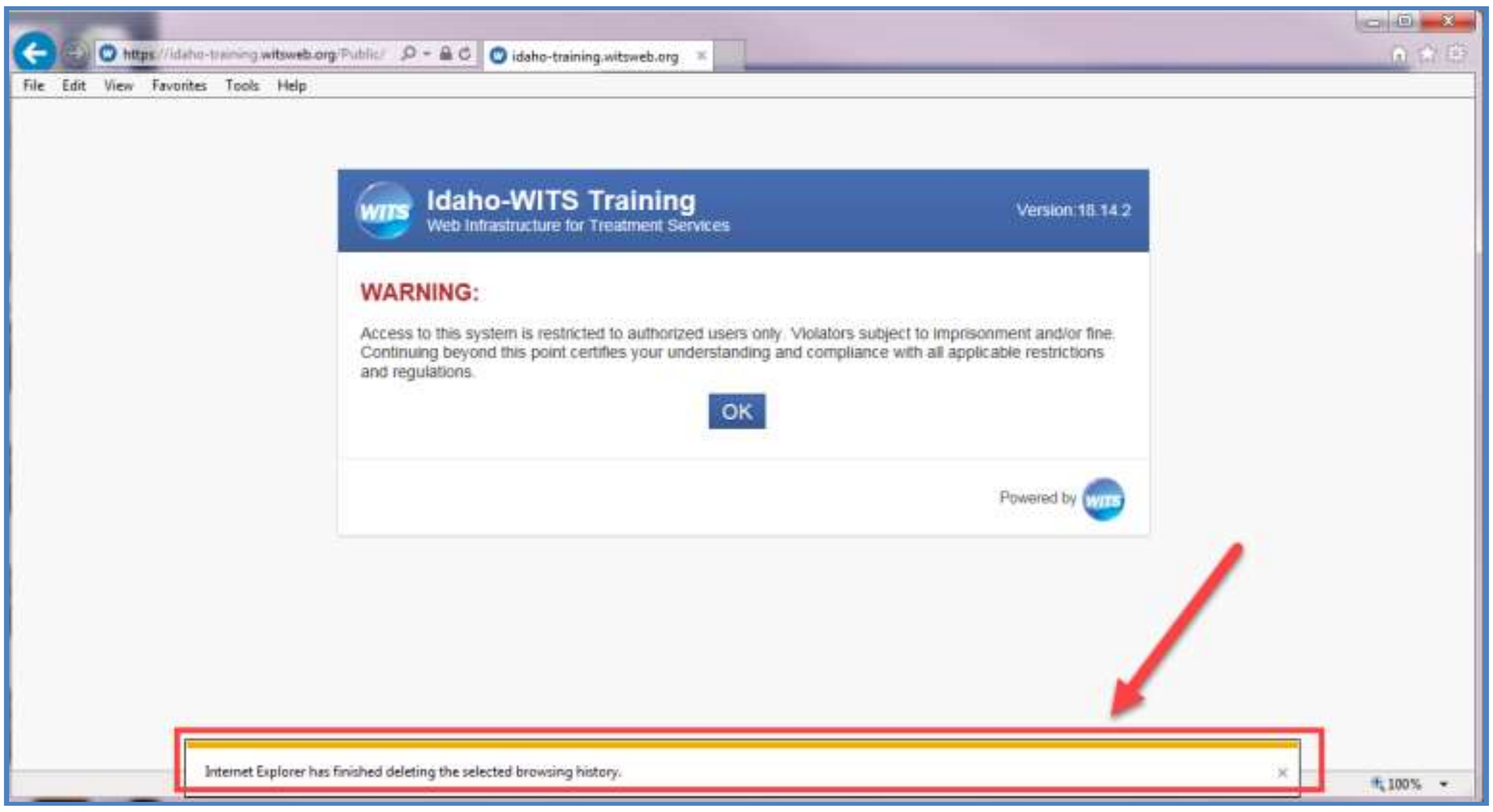


3. Click Safety and click Delete browsing history... .



4. Check the following boxes:
    - Temporary Internet files and website files
    - Cookies and website data
    - History
    - Download History
    - Form data

5. Click .



6. A notification box will appear at the bottom of your screen letting you know that Internet Explorer has finished deleting the selected browsing history.

Website Address for Idaho WITS

WITS is a secure HIPAA and CRF42 compliant EHR system, and this means that anyone accessing Idaho WITS is required to have a current, signed WITS User Agreement on file. Contact your Agency WITS Administrator if you are not sure if your WITS User Agreement was signed and sent to the Help Desk.

All client information is entered in the Production sites. **Do not enter any test clients/fake client data into the Production sites.**

Mountain Production Site: https://idaho-mountain.witsweb.org/Public/

Pacific Production Site: https://idaho-pacific.witsweb.org/Public/

WITS Training Site: https://idaho-training.witsweb.org/Public/

Logging Into and Out of WITS

Where to find my User Name and how to set my initial Password and Pin

WITS is a secure HIPAA and CRF42 compliant EHR system, and this means that anyone accessing Idaho WITS is required to have a current, signed WITS User Agreement on file. Contact your Agency WITS Administrator if you are not sure if your WITS User Agreement was signed and sent to the Help Desk.

Anyone logging into WITS must confirm the understanding of and compliance with related regulations prior to each WITS login. Specific language on the Log-in screen states: "**WARNING:** Access to this system is restricted to authorized users only. Violators subject to imprisonment and/or fine. Continuing beyond this point certifies your understanding and compliance with all applicable restrictions and regulations."

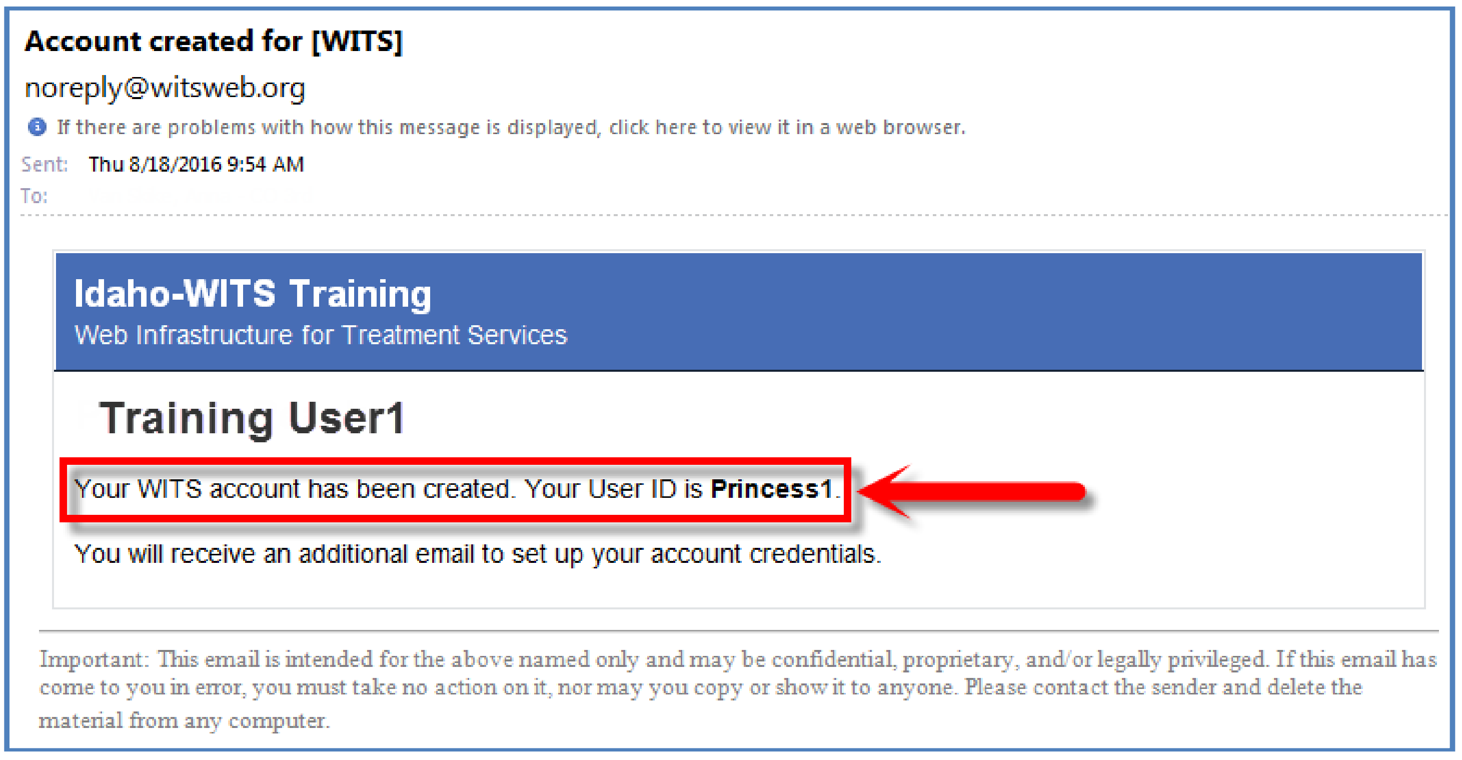
Anyone with access to Idaho WITS must never share their User ID, Password, and Pin with another person. All WITS Users must agree to securely maintain their login information within the WITS User Agreement. Any violation of the WITS User Agreement can result in the revocation of your access to Idaho WITS. Criminal prosecution may be undertaken if the information within WITS is knowingly and intentionally disclosed to anyone who is unauthorized, or if the information is used for fraudulent purposes.

Staff who work for multiple agencies must have a unique User ID, Password and PIN for each agency. Everything you do in WITS is recorded (your User ID is considered your signature under federal law).

When your Agency WITS Administrator (AWA) creates your WITS account, you will receive two emails from noreply@witsweb.org (the WITS system). If you do not see these emails in your inbox, check the "junk" or "spam" folders in your email.

You are required to change your password and pin every 90 days.

1. Open Internet Explorer 11 and update your Safe Sites and Clear your Cache.



Account created for [WITS]

noreply@witsweb.org

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Thu 8/18/2016 9:54 AM

To:

Idaho-WITS Training

Web Infrastructure for Treatment Services

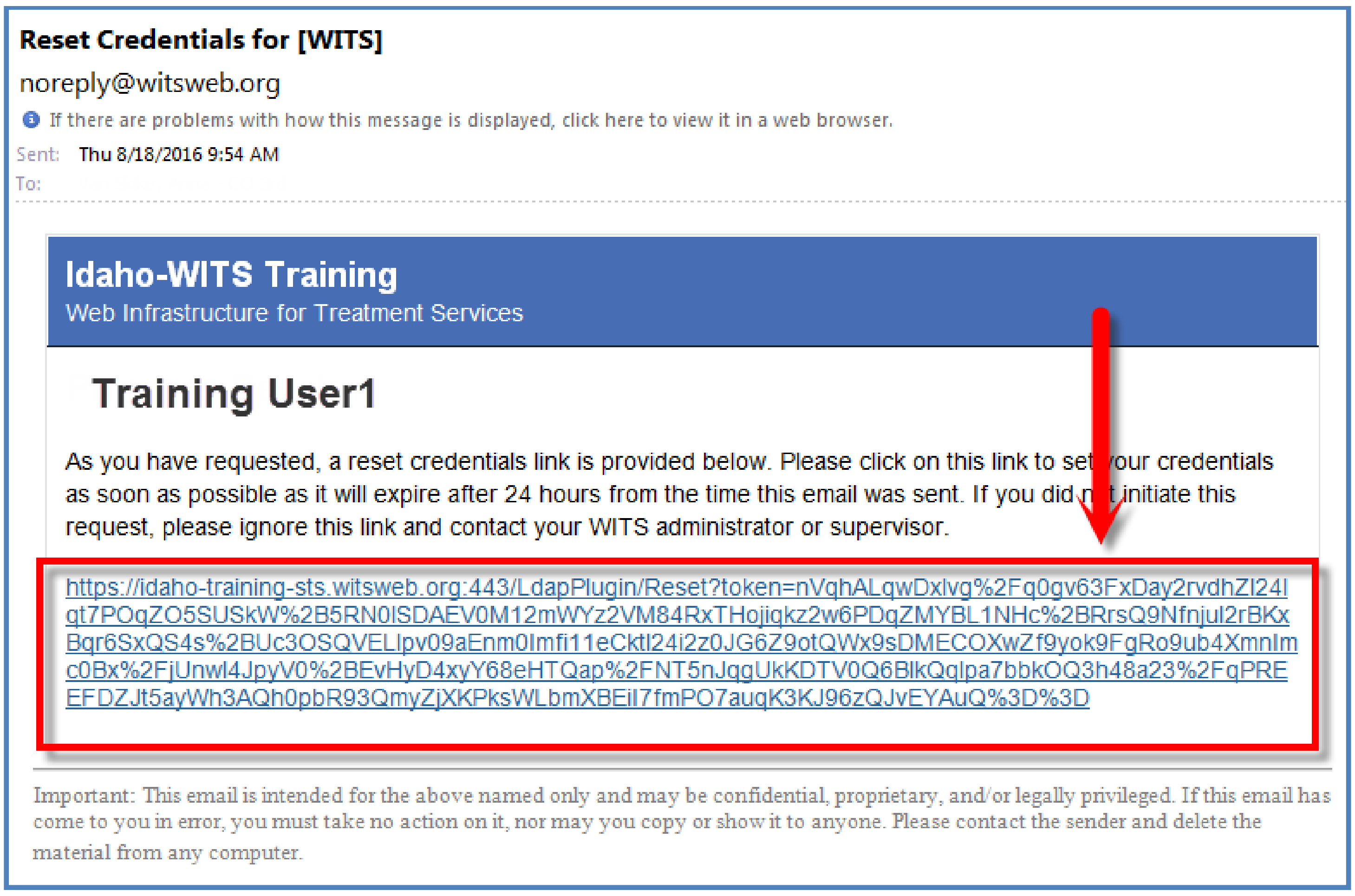
Training User1

Your WITS account has been created. Your User ID is **Princess1**.

You will receive an additional email to set up your account credentials.

Important: This email is intended for the above named only and may be confidential, proprietary, and/or legally privileged. If this email has come to you in error, you must take no action on it, nor may you copy or show it to anyone. Please contact the sender and delete the material from any computer.

2. Open the email with the subject line of **Account created for [WITS]**. This email contains your WITS User ID. Close the email after noting your User ID.



Reset Credentials for [WITS]

noreply@witsweb.org

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Thu 8/18/2016 9:54 AM

To:

Idaho-WITS Training
Web Infrastructure for Treatment Services

Training User1

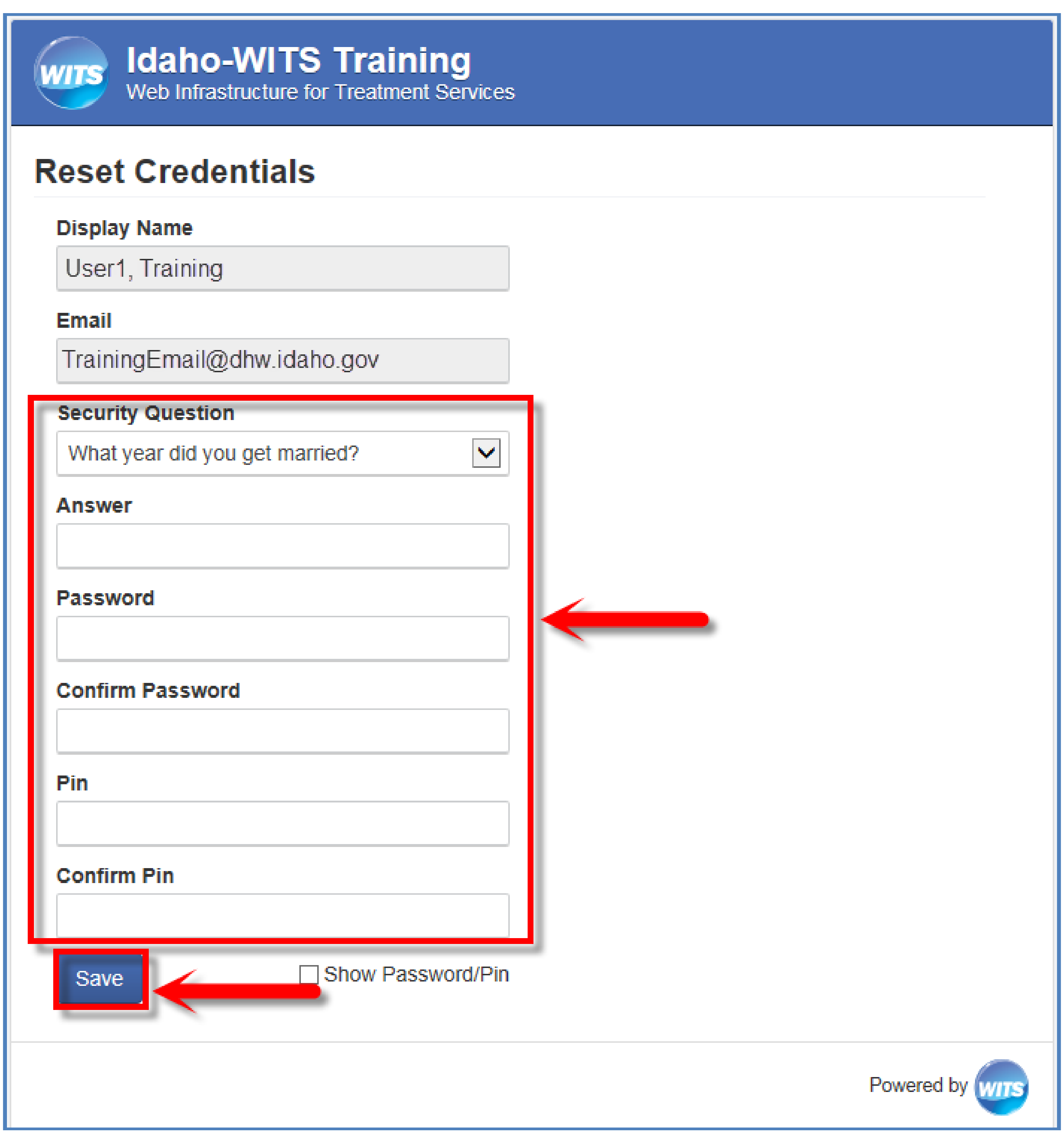
As you have requested, a reset credentials link is provided below. Please click on this link to set your credentials as soon as possible as it will expire after 24 hours from the time this email was sent. If you did not initiate this request, please ignore this link and contact your WITS administrator or supervisor.

https://idaho-training-sts.witsweb.org:443/LdapPlugin/Reset?token=nVqhALqwDxlvg%2Fq0gv63FxDay2rvdhZI24Iqt7POqZO5SUSkW%2B5RN0ISDAEV0M12mWYz2VM84RxTHojiqkz2w6PDqZMYBL1NHc%2BRrsQ9Nfnjul2rBKxBqr6SxQS4s%2BUc3OSQVELIpv09aEnm0Imfi11eCktI24i2z0JG6Z9otQWx9sDMECOXwZf9yok9FgRo9ub4XmnImc0Bx%2FjUnwl4JpyV0%2BEvHyD4xyY68eHTQap%2FNT5nJqgUkKDTV0Q6BlkQqlpa7bbkOQ3h48a23%2FqPREEFDZJt5ayWh3AQh0pbR93QmyZjXKPksWLbmXBEil7fmPO7auqK3KJ96zQJvEYAuQ%3D%3D

Important: This email is intended for the above named only and may be confidential, proprietary, and/or legally privileged. If this email has come to you in error, you must take no action on it, nor may you copy or show it to anyone. Please contact the sender and delete the material from any computer.

3. Open the email with the subject line of **Reset Credentials for [WITS]**. Click on the link to set your security question/answer, password, and pin.

Passwords and PINs must be at least six characters with a mix of letters, numbers and other special characters, and must be different than your user name. It is recommended that names, words, and common acronyms not be used as Passwords and PINs.



Idaho-WITS Training
Web Infrastructure for Treatment Services

Reset Credentials

Display Name
User1, Training

Email
TrainingEmail@dhw.idaho.gov

Security Question
What year did you get married?

Answer

Password

Confirm Password

Pin

Confirm Pin

Save

Show Password/Pin

Powered by WITS

3. Select your Security Question and enter your Answer.

4. Complete all Password and Pin fields and click Save.

5. A message appears indicating your information has been successfully updated.

6. Close the window. You are now ready to log into WITS. Click here for instructions on how to log into WITS.

How to Log into WITS

WITS is a secure HIPAA and CRF42 compliant EHR system, and this means that anyone accessing Idaho WITS is required to have a current, signed WITS User Agreement on file. Contact your Agency WITS Administrator if you are not sure if your WITS User Agreement was signed and sent to the Help Desk.

Anyone with access to Idaho WITS must never share their User ID, Password, and Pin with another person. All WITS Users must agree to securely maintain their login information within the WITS User Agreement. Any violation of the WITS User Agreement can result in the revocation of your access to Idaho WITS. Criminal prosecution may be undertaken if the information within WITS is knowingly and intentionally disclosed to anyone who is unauthorized, or if the information is used for fraudulent purposes.

Staff who work for multiple agencies must have a unique User ID, Password and PIN for each agency. Everything you do in WITS is recorded (your User ID is considered your signature under federal law).

You are required to change your password and pin every 90 days.

Only log into WITS using Internet Explorer 11. Browsers like Chrome, Safari, Edge, or Firefox are not supported by WITS and will not work correctly.

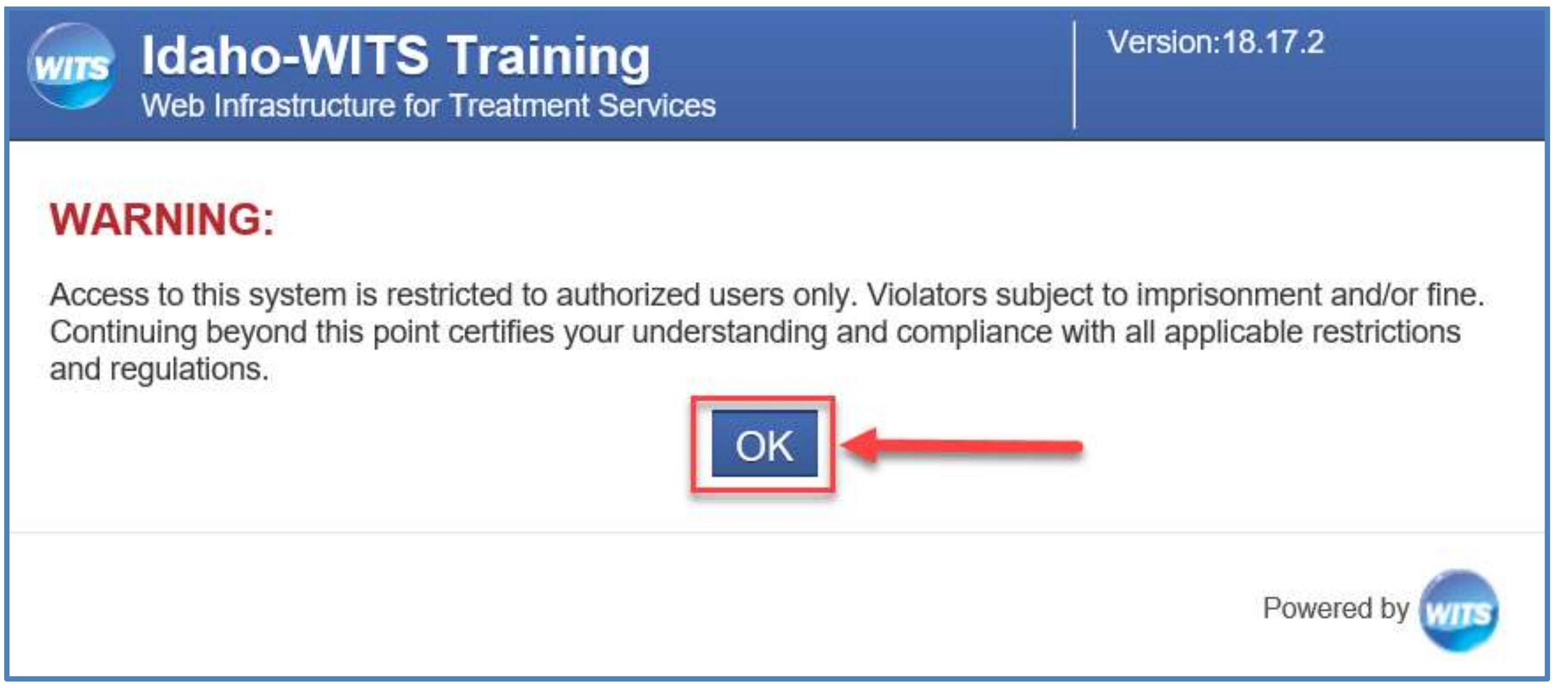
WITS will timeout after there has been no activity for 121 minutes.

1. Open Internet Explorer 11 and update your Safe Sites and Clear your Cache.
2. If you are in the Mountain Time zone go to https://idaho-mountain.witsweb.org/

OR

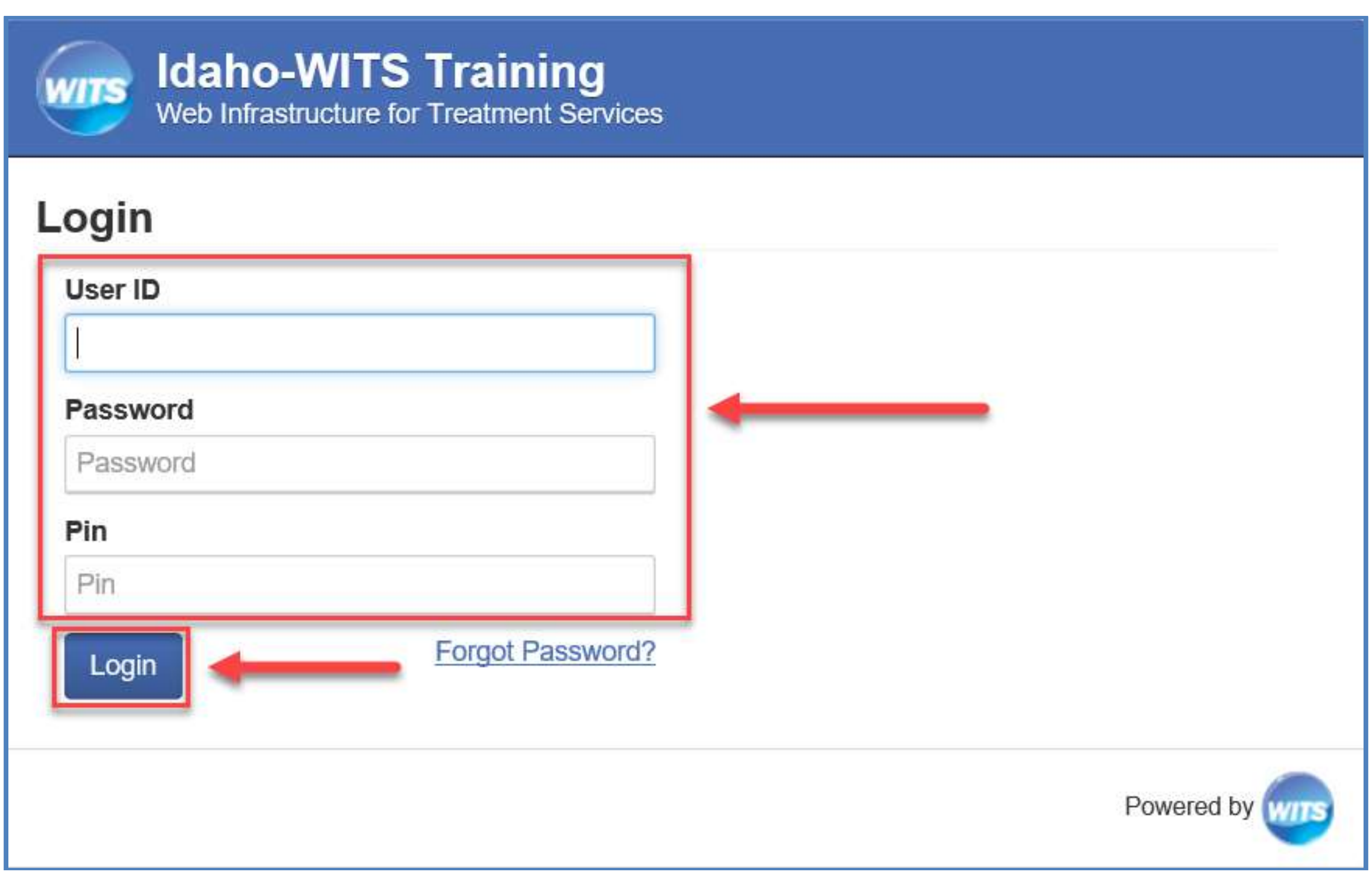
If you are in the Pacific Time zone go to https://idaho-pacific.witsweb.org/

Anyone logging into WITS must confirm the understanding of and compliance with related regulations prior to each WITS login. Specific language on the Log-in screen states: "**WARNING:** Access to this system is restricted to authorized users only. Violators subject to imprisonment and/or fine. Continuing beyond this point certifies your understanding and compliance with all applicable restrictions and regulations."

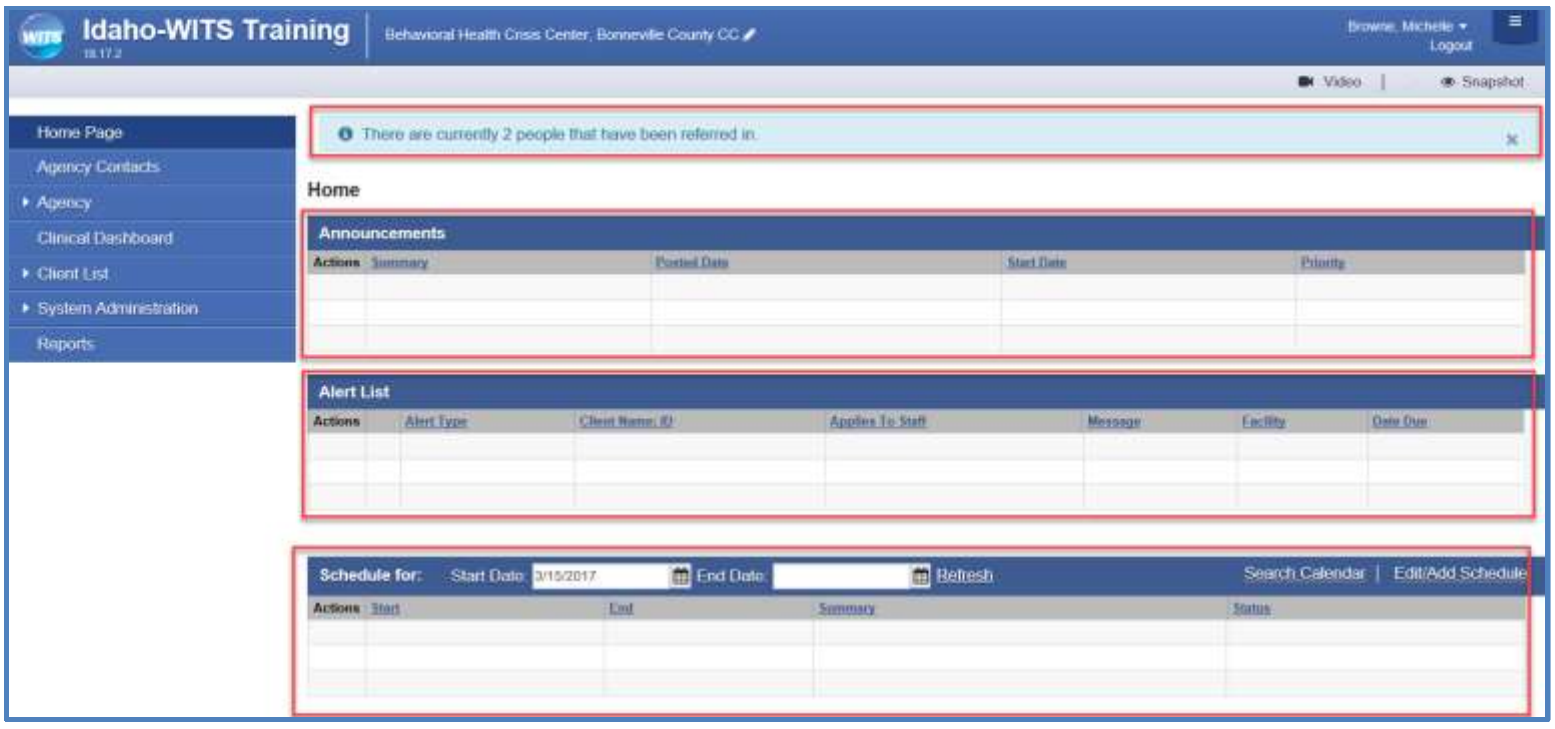


4. Review the warning message and click OK.

Your WITS account will be Disabled if you enter your Password or PIN incorrectly more than three times. If your account becomes Disabled, contact your Agency WITS Administrator or the WITS Help Desk.



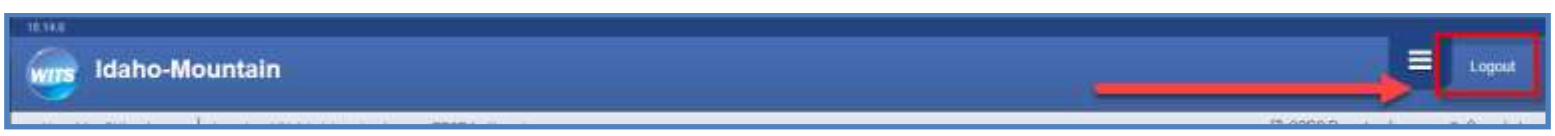
5. Enter your User ID, Password, and Pin**.** Click Login.



6. You are logged successfully into Idaho WITS. The Home Page features Notifications, Announcements, Alert Lists, and the Scheduler.

How to Log out of WITS

1. Begin on any page.



2. Click Logout.

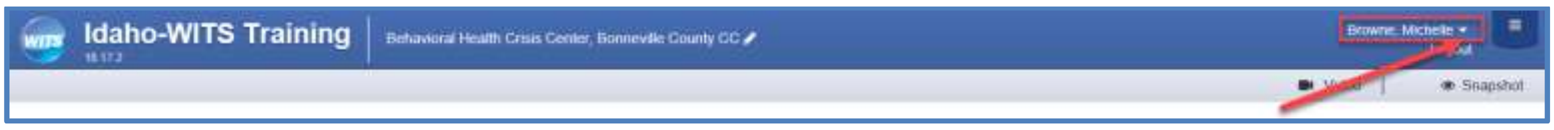
3. Click Yes to log out or click No to cancel.

How to Change your Password and Pin

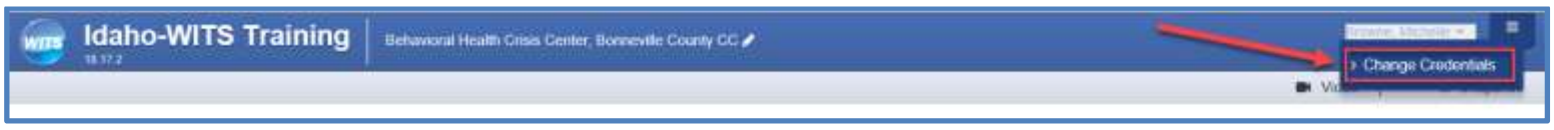
Anyone with access to Idaho WITS must never share their User ID, Password, and Pin with another person. All WITS Users must agree to securely maintain their login information within the WITS User Agreement. Any violation of the WITS User Agreement can result in the revocation of your access to Idaho WITS. Criminal prosecution may be undertaken if the information within WITS is knowingly and intentionally disclosed to anyone who is unauthorized, or if the information is used for fraudulent purposes.

Passwords and PINs must be at least six characters with a mix of letters, numbers and other special characters, and must be different than your user name. It is recommended that names, words, and common acronyms not be used as Passwords and PINs.

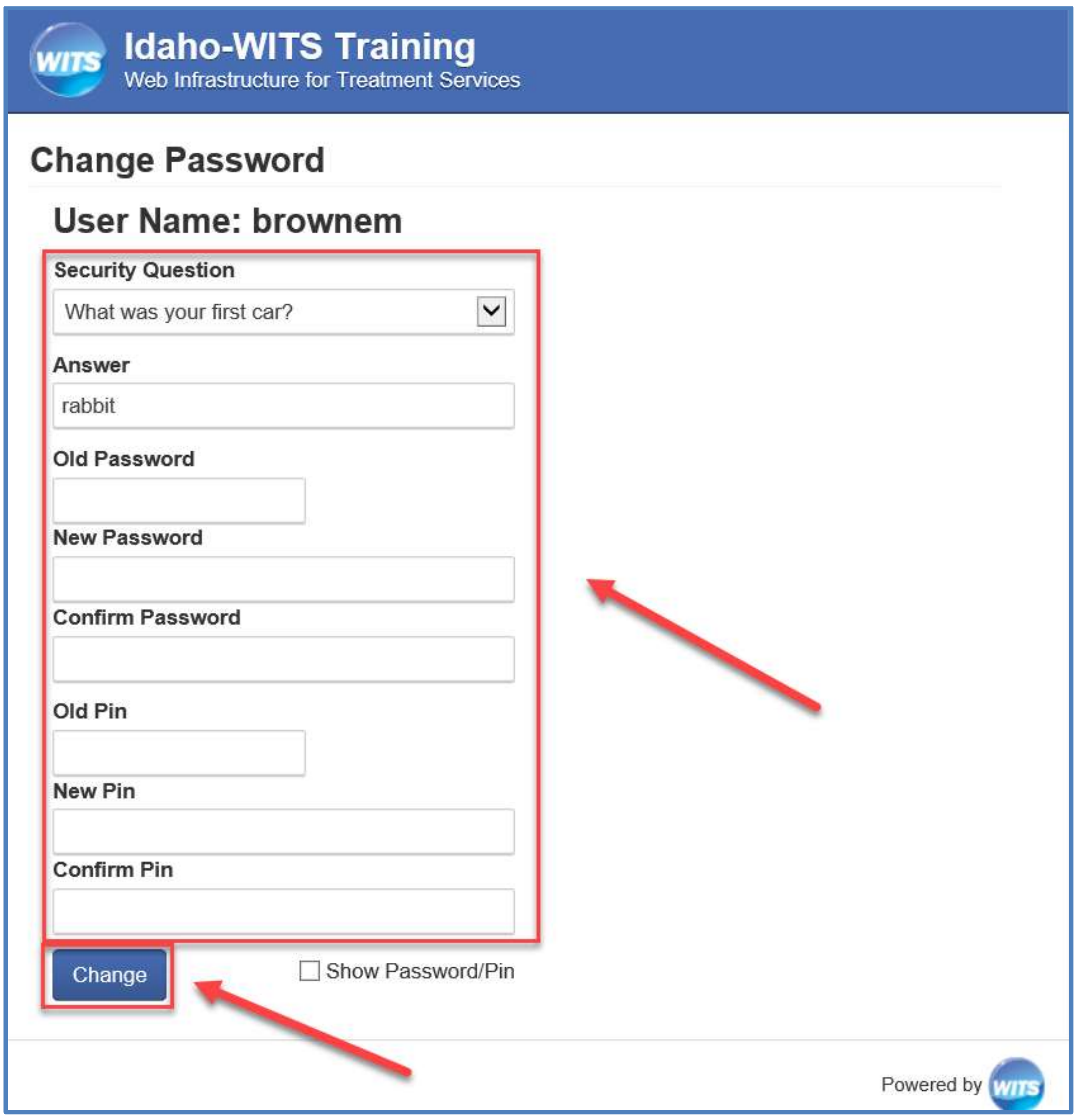
1. Begin on any page.



2. Click  next to your name on the gray bar.



3. Click › Change Credentials.



4. Complete the following fields.
   - Security Question – change your security question if needed.
   - Answer – enter the answer to your security question.
   - Old Password – enter your current password.
   - New Password – enter your new password.
   - Confirm Password – enter your new password.
   - Old Pin – enter your current pin.
   - New Pin – enter your new pin.
   - Confirm Pin – enter your new pin.
5. Click Change.

What to do when you have issues logging into WITS

If you are trying to log into WITS and run into issues where the page does not display correctly, follow these troubleshooting steps.

1. Check which browser you are using. The only fully supported browser for WITS is Internet Explorer version 11. Browsers like Chrome, Safari, Edge, or Firefox are not supported by WITS and will not work correctly.
2. Update your Safe Sites
3. Clear your Cache
4. Contact your Agency WITS Administrator (AWA) for assistance.
5. Contact the WITS Help Desk for assistance.
   - Email: DBHWITSHD@dhw.idaho.gov
   - Phone: 208-332-7316
   - Toll Free: 1-844-726-7493

Crisis Center Starter Guides

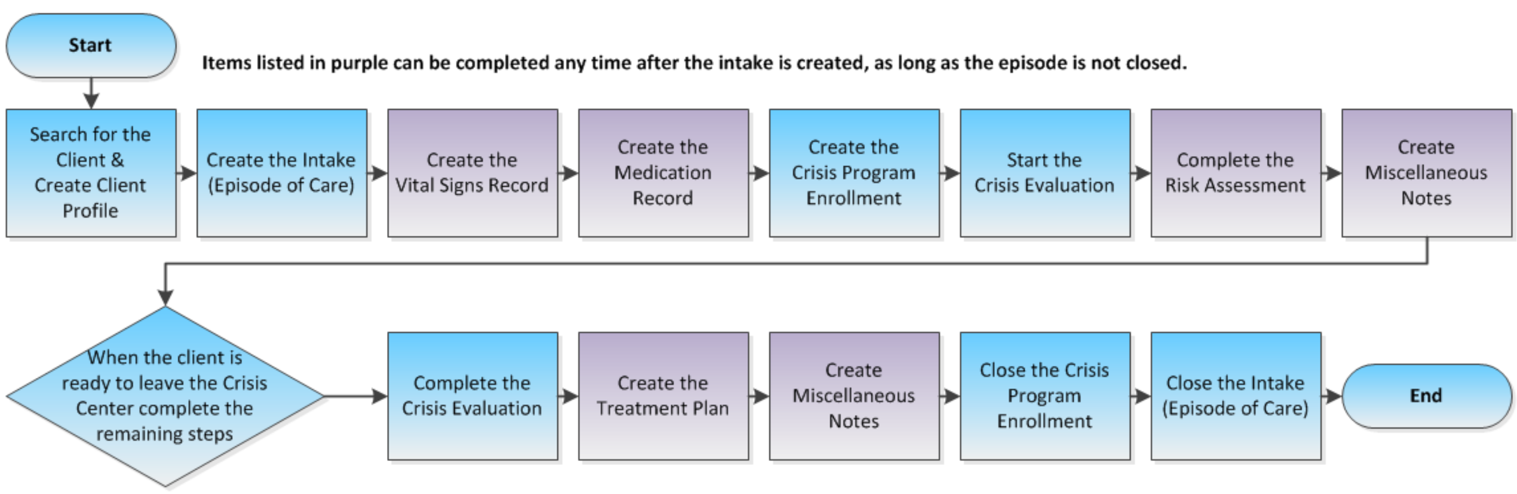
The Crisis Center Starter Guides are a great place to start! They will walk you through everything you need to do in WITS from start to finish and are broken down by when the client is presentand when the client is not present.

For a more comprehensive guide, please select the Technical Manual from the navigation pane on the left. Included in the Technical Manual are specific requirements and policies for entering information into the system, and will be helpful for the experienced user.

Process when Clients are Present

Miscellaneous Notes and Vital Sign Records should be created multiple times throughout the episode of care as appropriate.

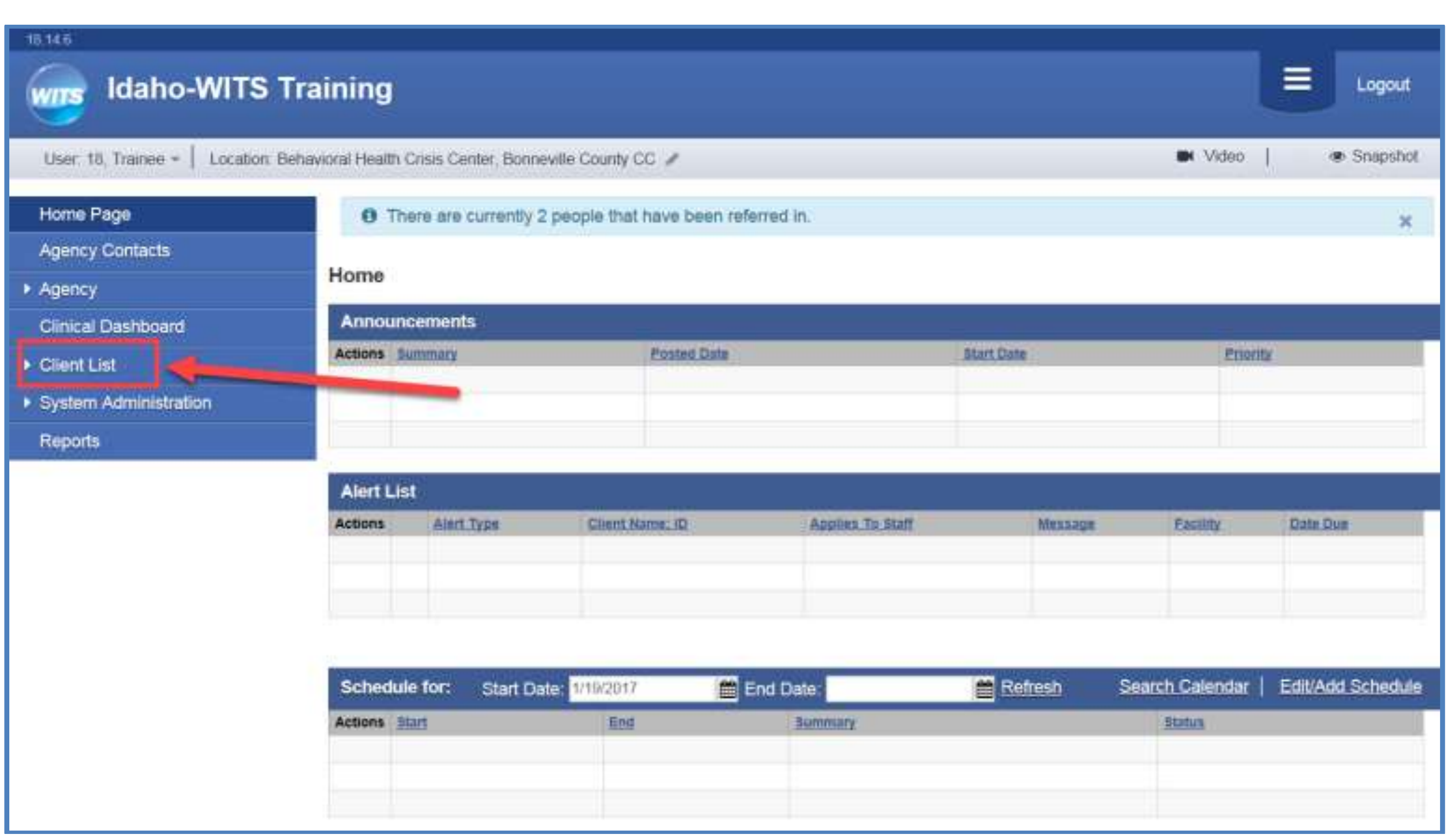
If you would like to print information from this page, make sure to expand as many sections as desired and then click the Print icon in the upper right corner of the page.



1. When the client comes to the Crisis Center, search WITS to see if the client already exists in the system. If they do, skip to step 3 and start a new episode by creating the Intake

How to search WITS to see if the client already exists

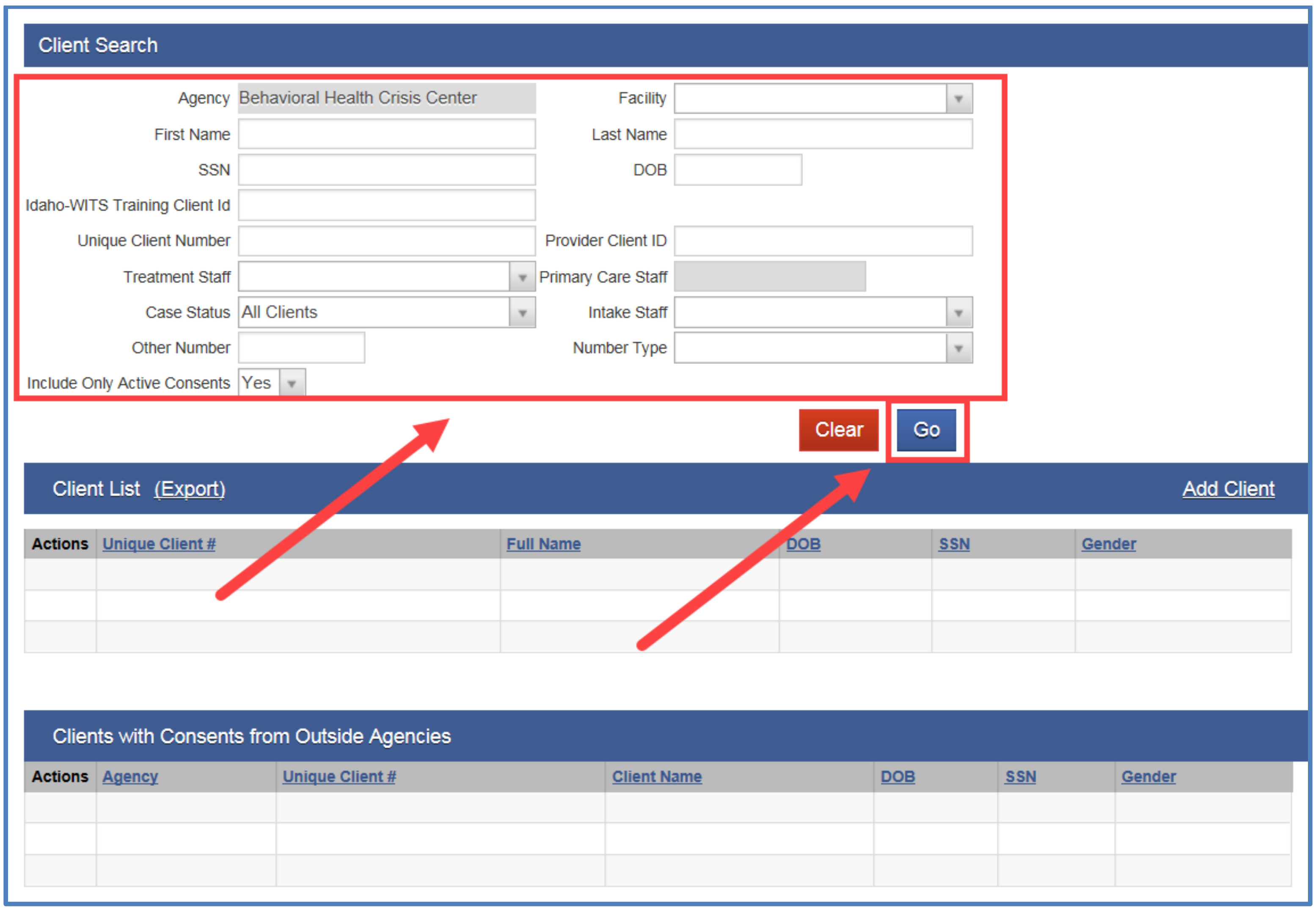
1. Begin on the Home Page.



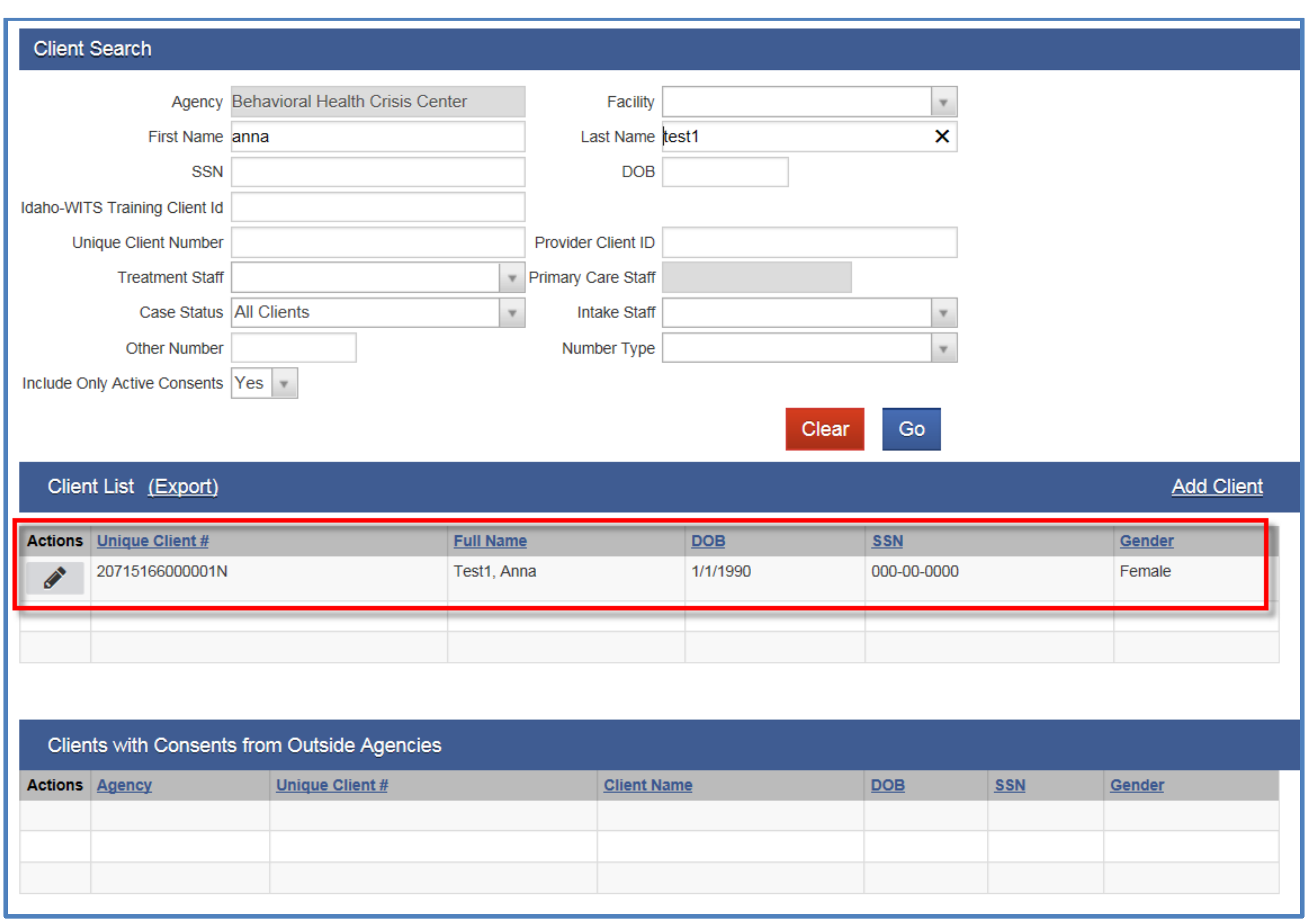
2. Click Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

To view only Active Clients, select a Case Status of Clients with Open Cases.



3. Enter search criteria on the Client Search page and click .



4. If your search locates your client, he or she will be listed under the Client List section as shown above. This means the client has been at the BHCCC before and you can skip the next step of Creating a New Client.

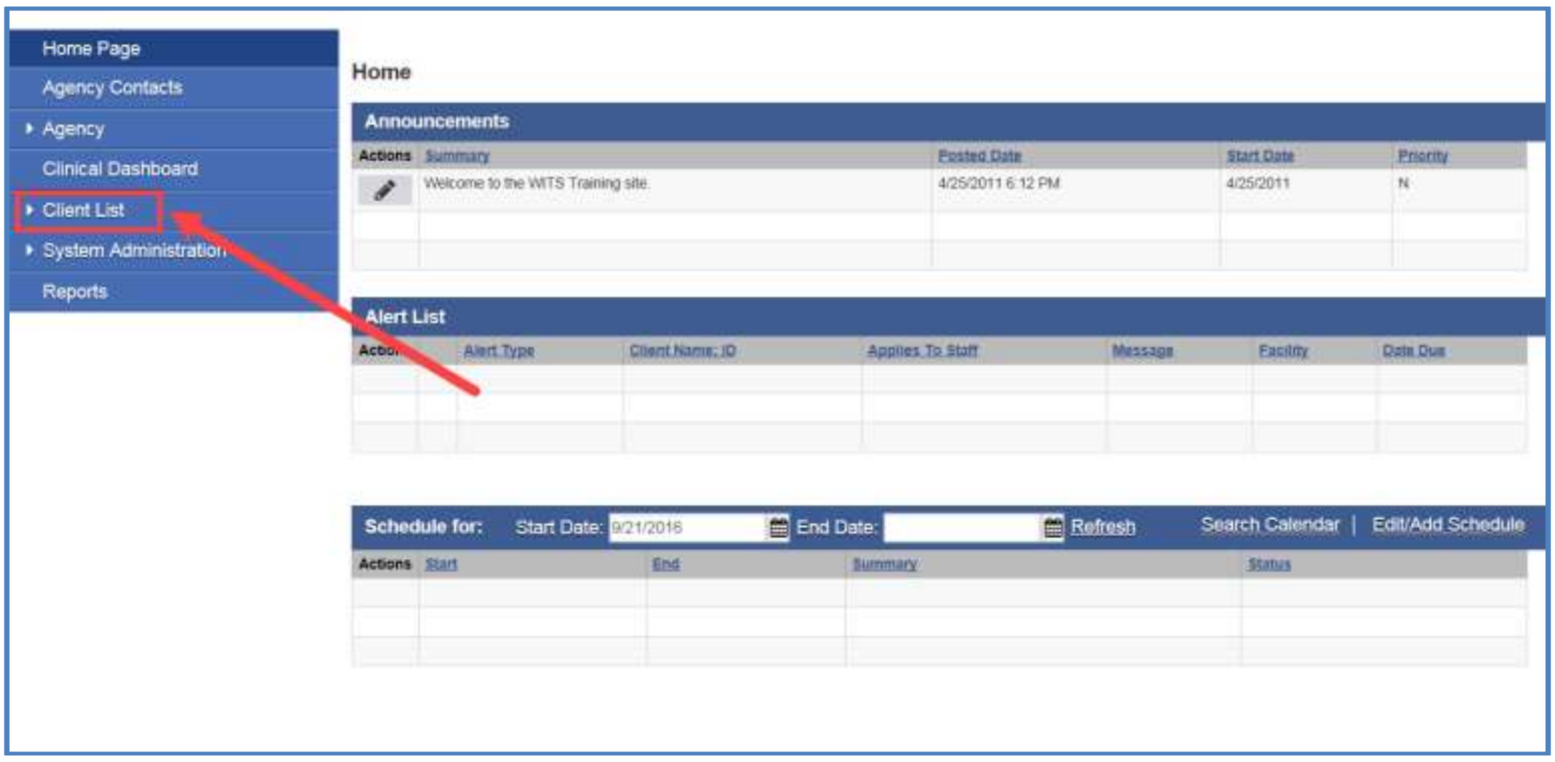
5. If your search does not locate your client, he or she will not be listed under the Client List section. Proceed to the next step by Creating a New Client.

6. If the client has not previously been at the Crisis Center you will need to start by creating the Client Profile

Creating a New Client

Before you create a new client record, always search for the client as shown below. This will help you to avoid creating duplicate clients.

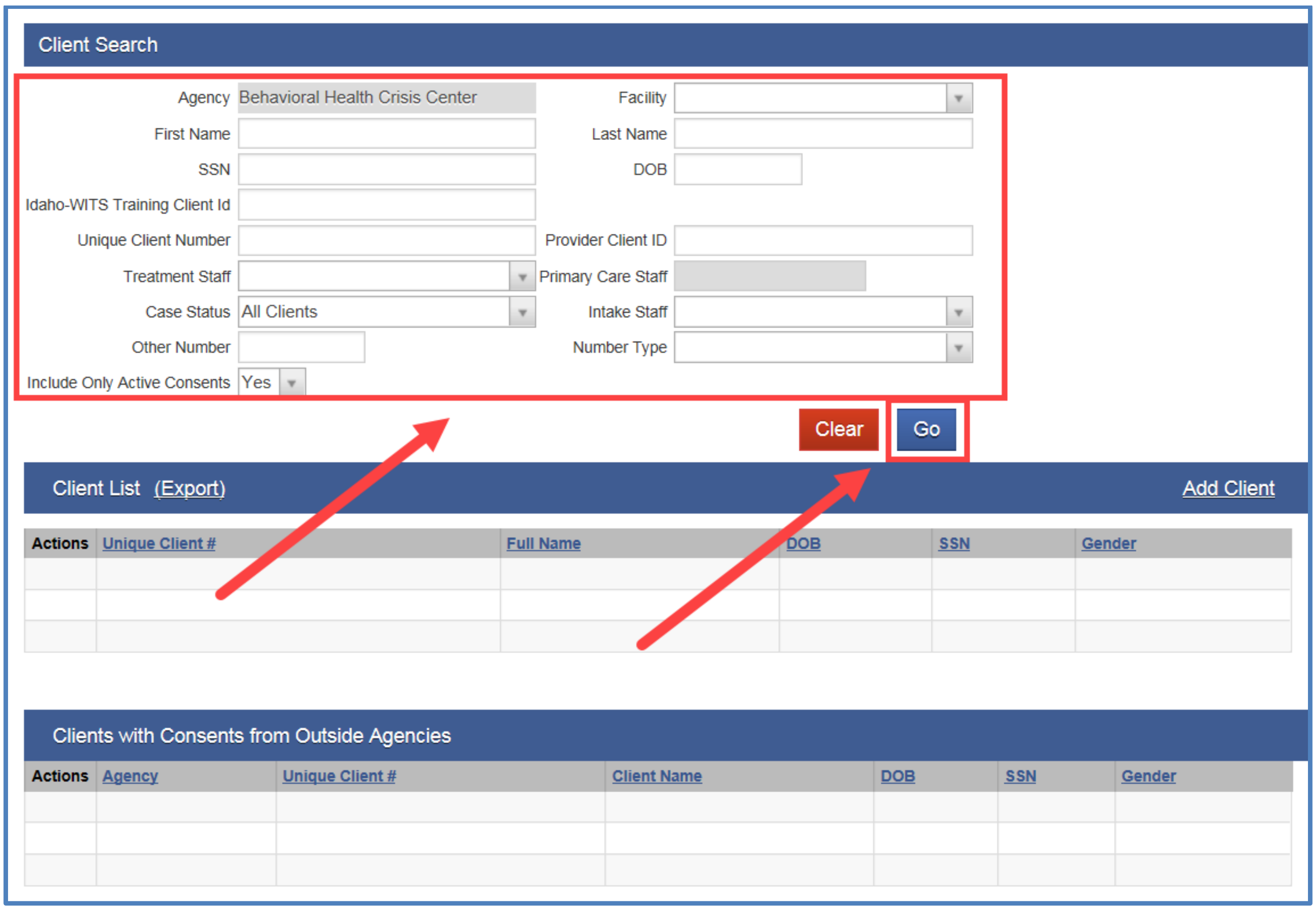
1. Begin on the Home Page.



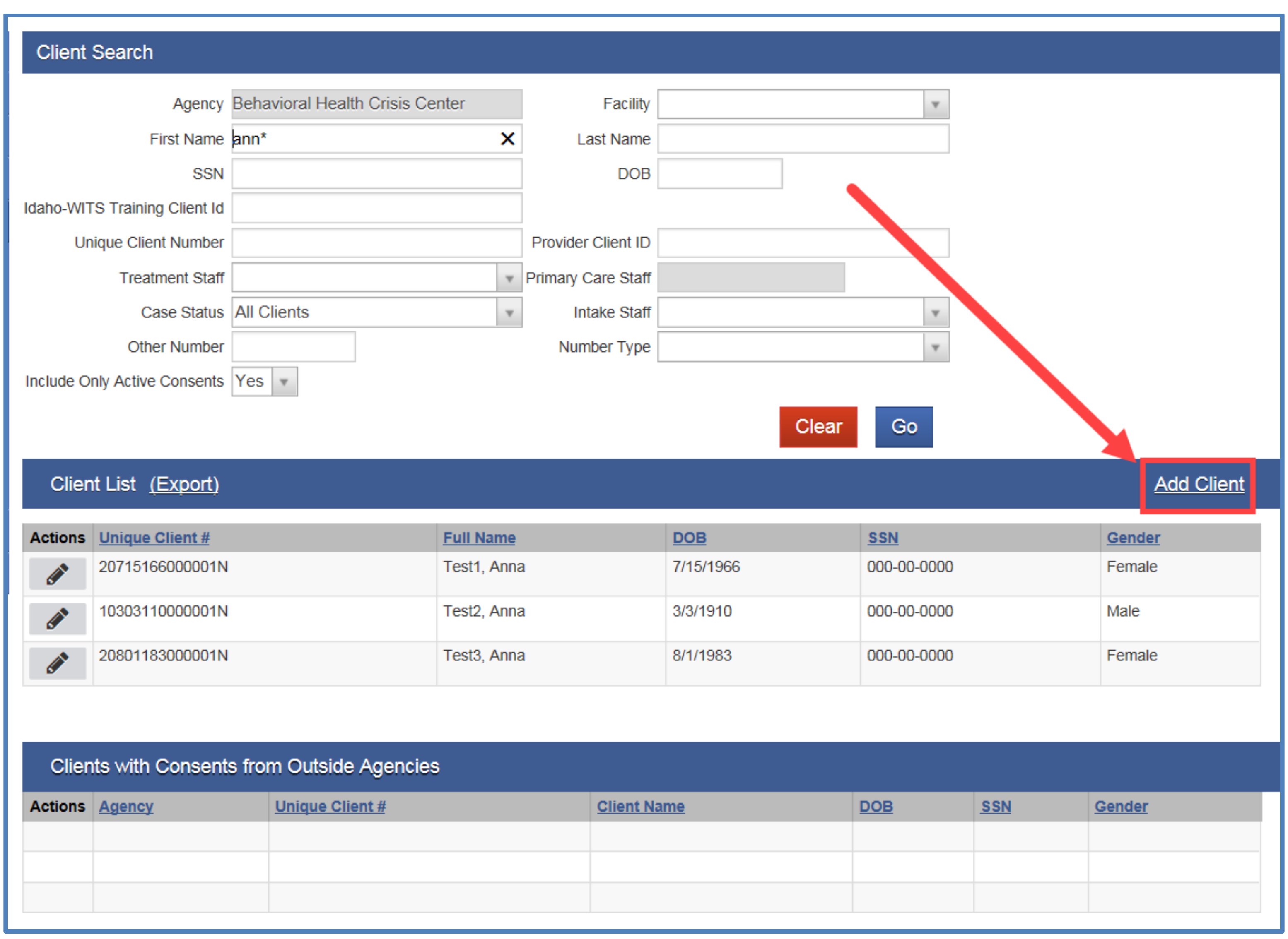
2. Click ▸ Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

To view only Active Clients, select a Case Status of Clients with Open Cases.



2. Enter the search criteria and click Go .



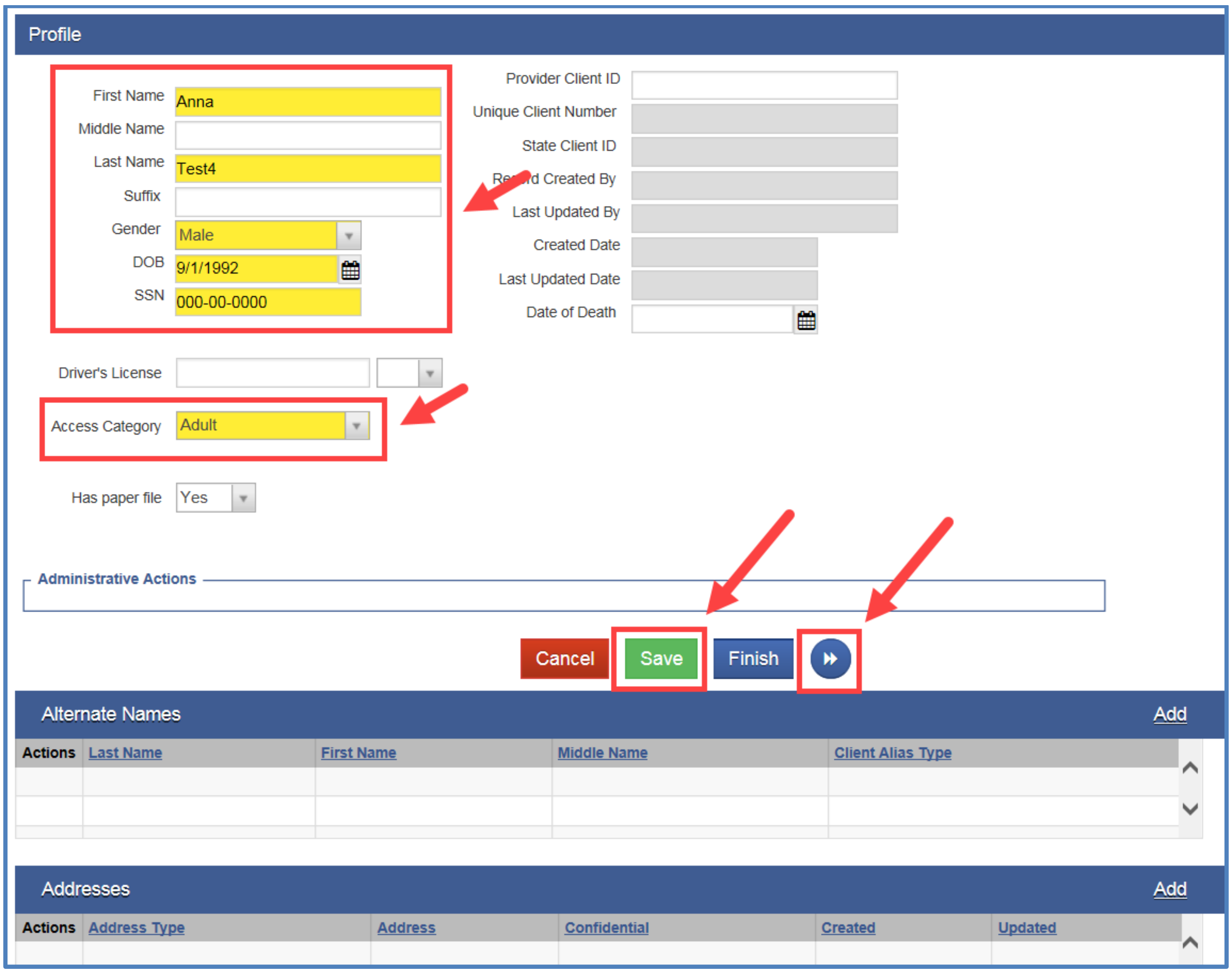
3. If you do not find your client in the Client List, click Add Client.

4. The Profile page will display.

Profile

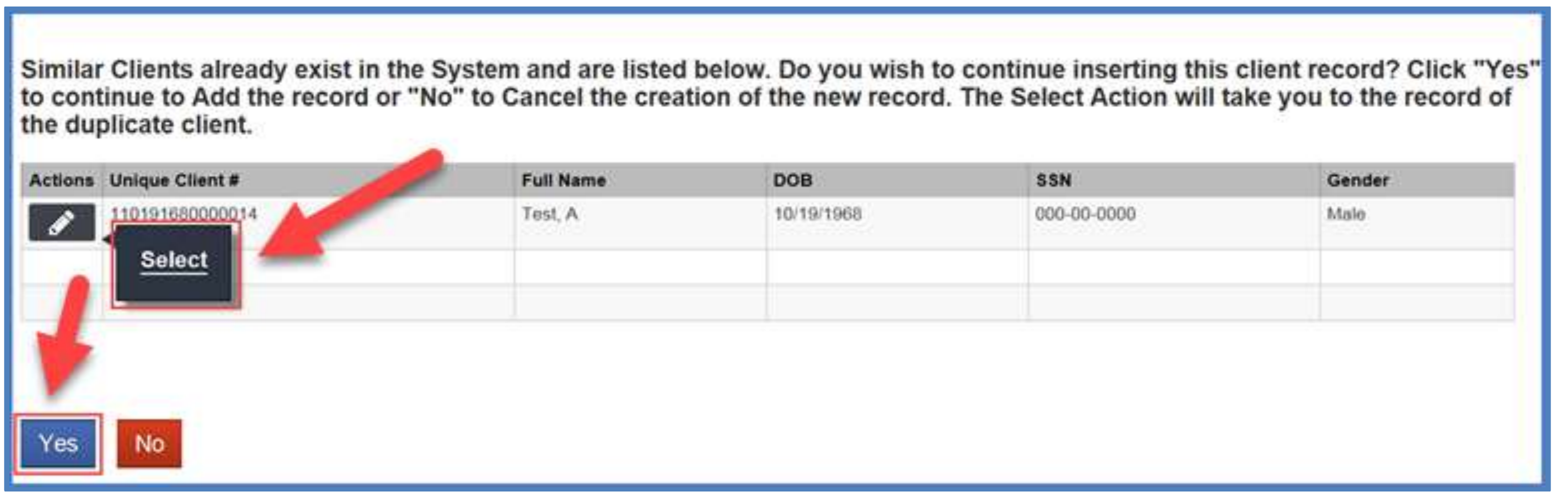
The First Name, Gender, DOB, and SSN fields are particularly important, as this data feeds into the system generated Unique Client Number field. Once the Unique Client Number has been created by WITS and there is an Intake for the client, it cannot be changed. Make sure that information is entered accurately, as it will affect future searches for the client in WITS.

Warning messages will display if the client is over 75 years old or less than 5 years old.



1. Complete the following fields.
   - First Name – enter client's first name
   - Last Name – enter client's last name
   - Gender – select the client's gender
     - Female
     - Male
     - Refused
     - Transgender Female: person designated male at birth but identifies as female
     - Transgender Male: person designated female at birth but identifies as male
     - Unknown
   - Date of Birth – enter client's birth date as MM/DD/YY
   - Social Security Number – it is very important to get the clients SSN up front. However, if this is not possible, the system will accept 000-00-0000 as a SSN. This is the only SSN that may be entered WITS more than once.
2. Click Save and click .

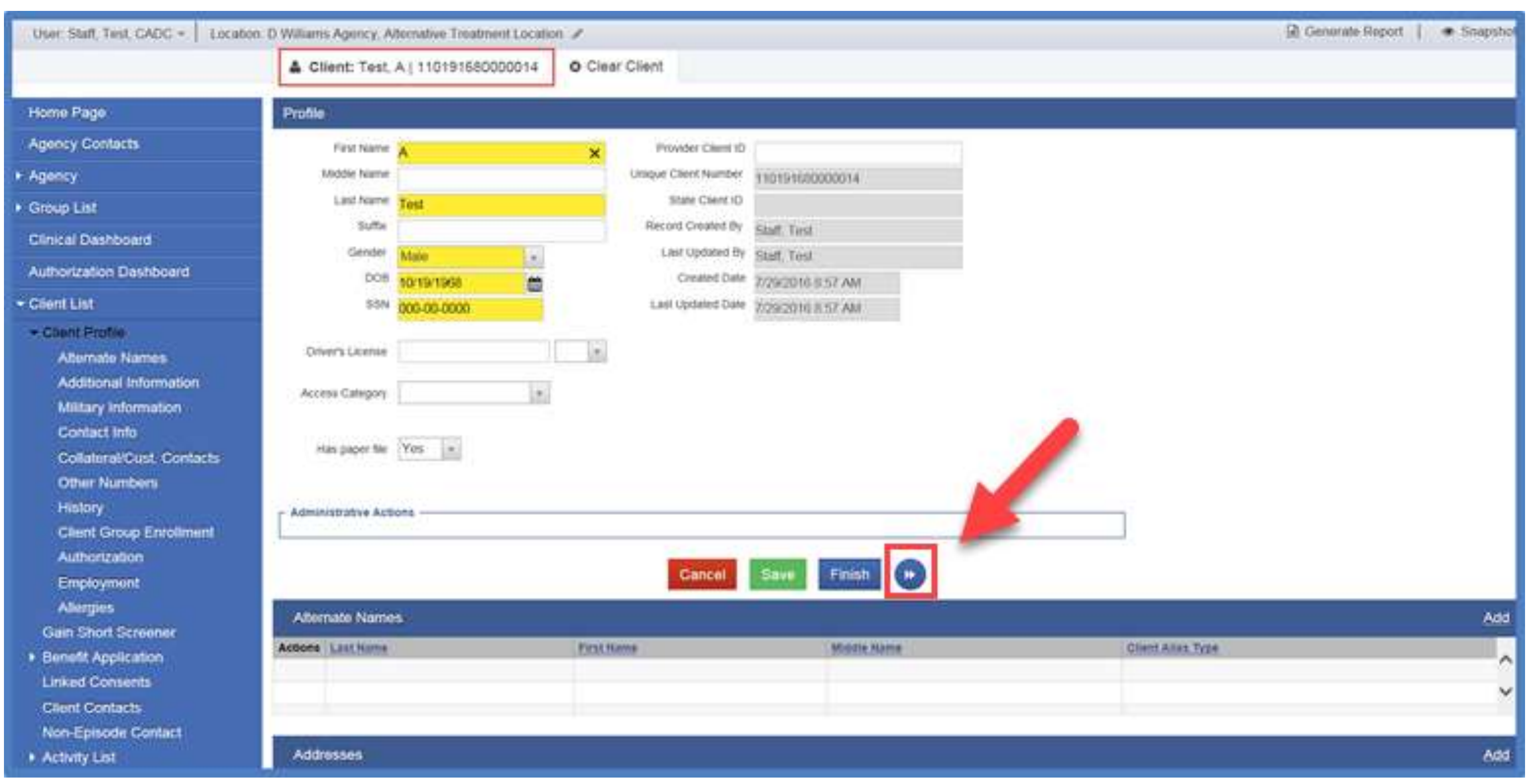
WITS is designed to prevent duplicate records. Based on first name and date of birth, the system will display a list of potential duplicates and the message below during the process of creating a client record. **When there are no potential duplicates, the below message will not display.**



3. Click ✎ and **Select** under Actions to go to the Client Profile if it is the same client (the client exists in WITS).

OR

4. Click **Yes** to continue to add the client you entered ***(if the new client is not a duplicate client record).***



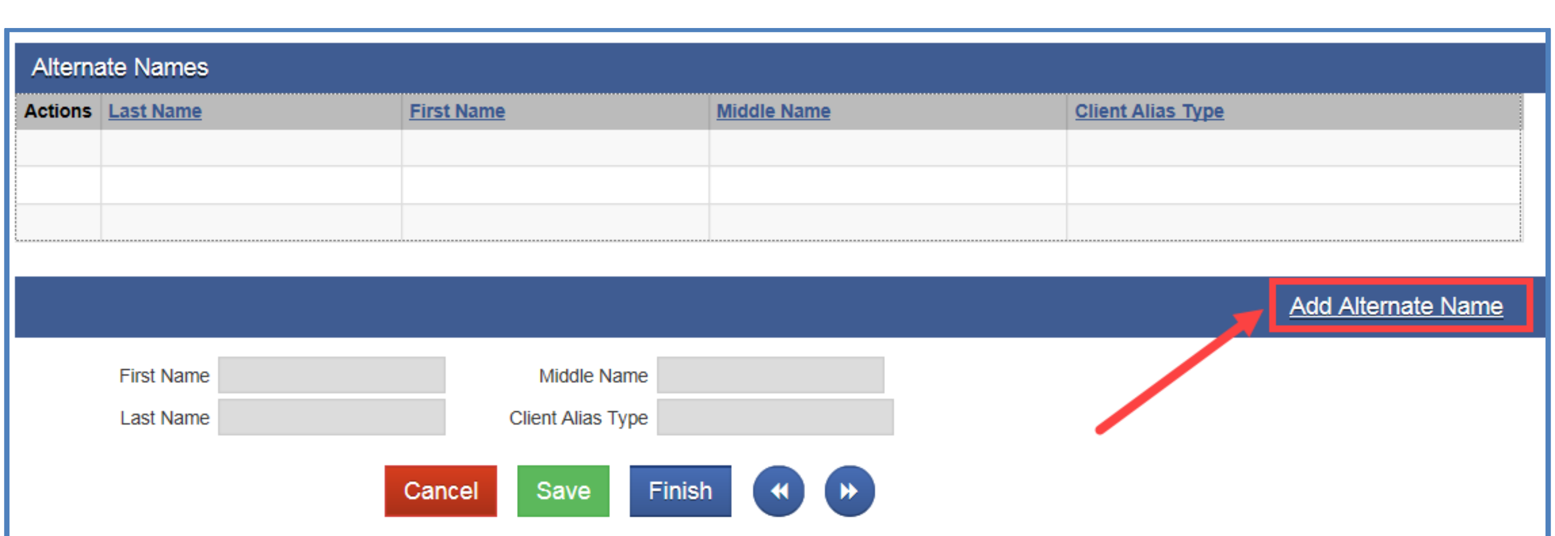
5. Once the client is created, the client's name appears in the Context area of the WITS Context Bar.

6. Click ⏩.

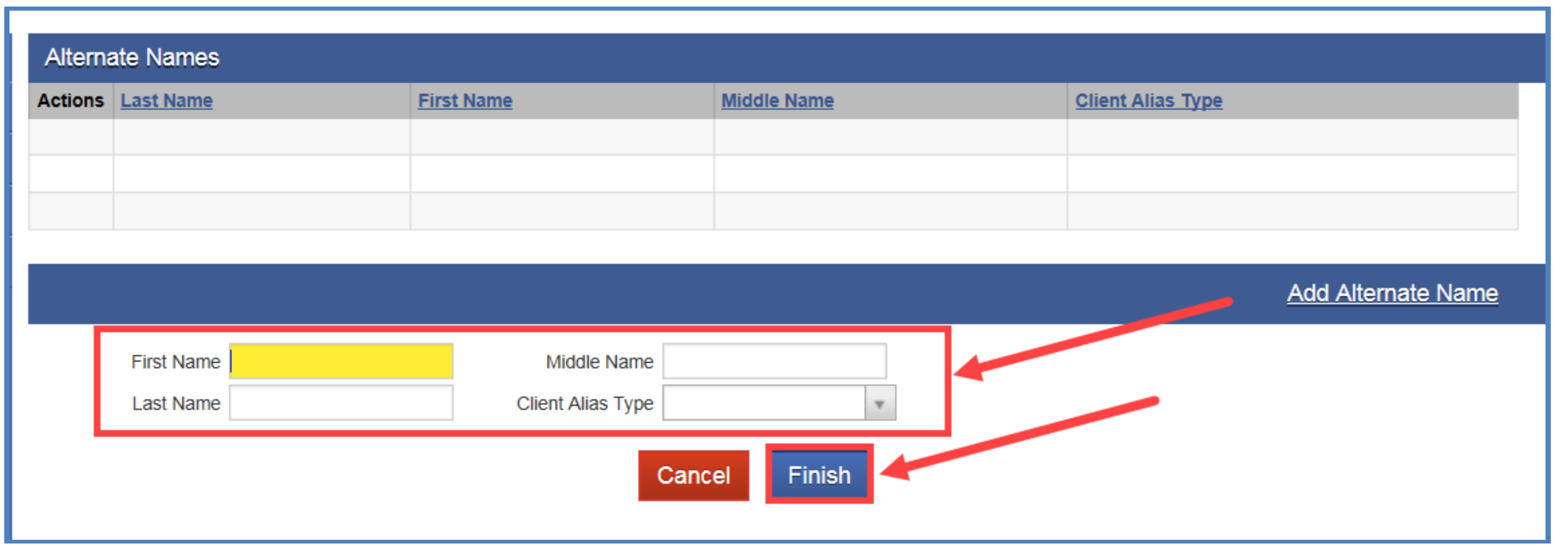
7. The Alternate Names page will display.

Alternate Names

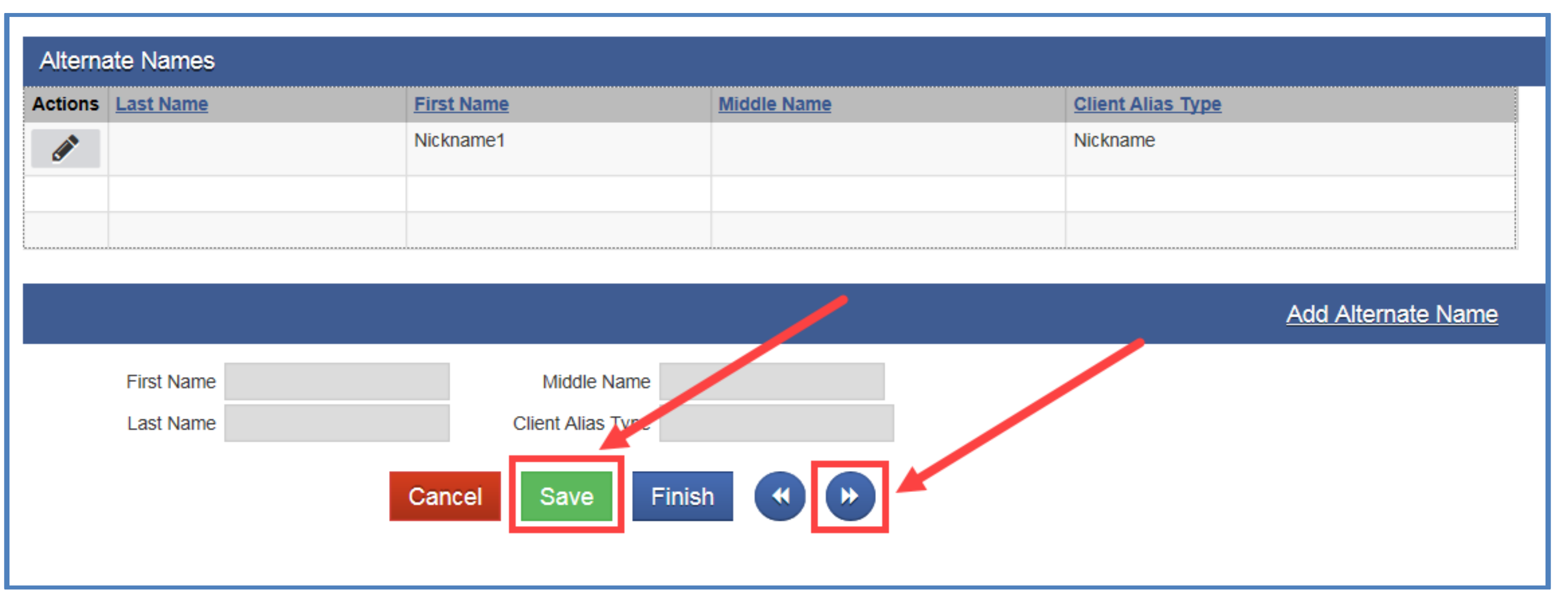
Enter all known alternate names (alias, street name, etc.) used by the client (these are searchable items on the Client Search page).



1. Click Add Alternate Name.



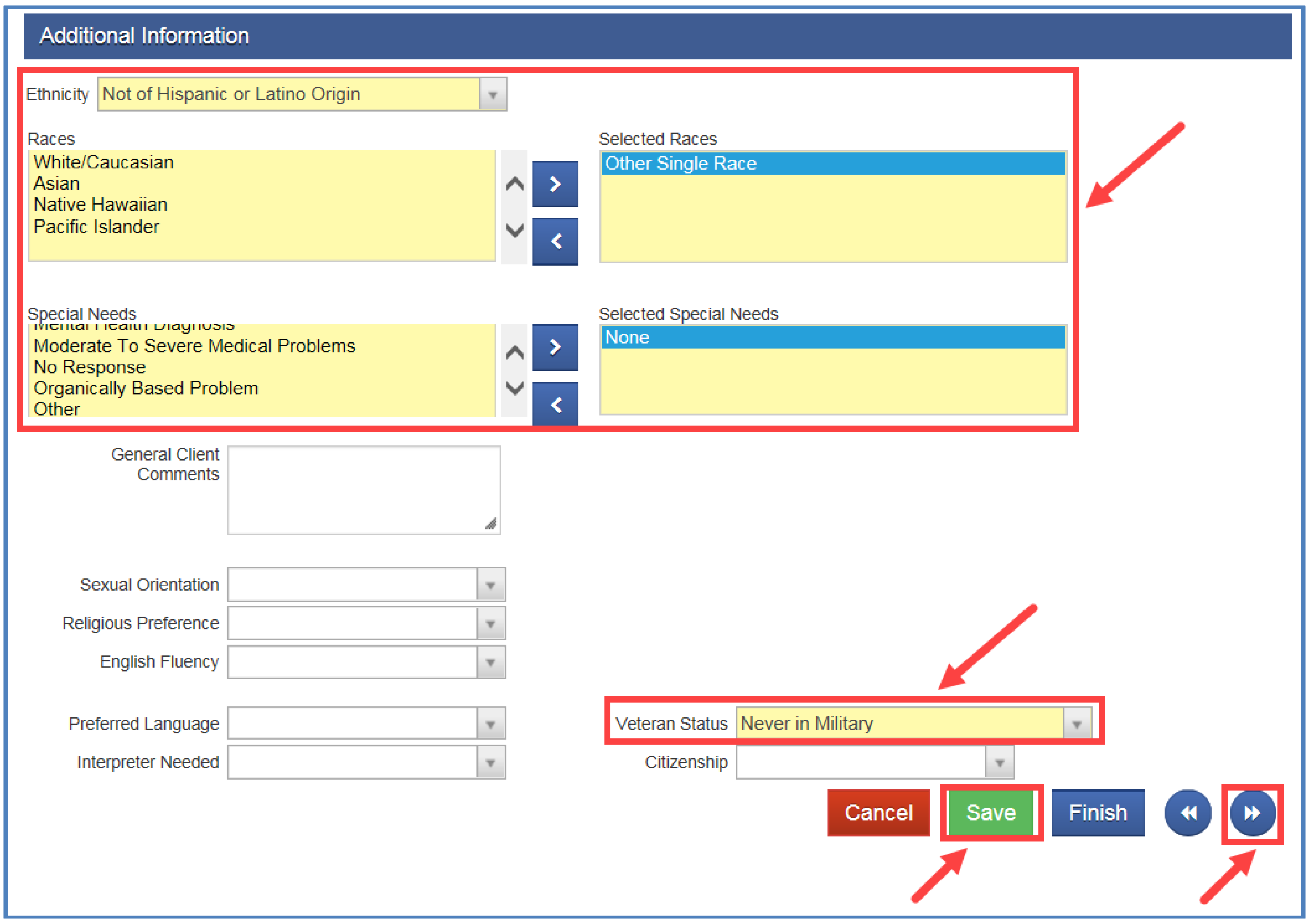
2. Complete the following fields.
   - First Name – enter the client's alternate first name.
   - Client Alias Type – select the alias type.
3. Click Finish.



4. Click Save and click ⏩.
5. The Additional Information page will display.

Additional Information

TIPS Ethnicity: Other Specific Hispanic or Latino is defined as: of known Central or South American or any other Spanish culture or origin (including Spain), other than Puerto Rican, Mexican, or Cuban, regardless of race.

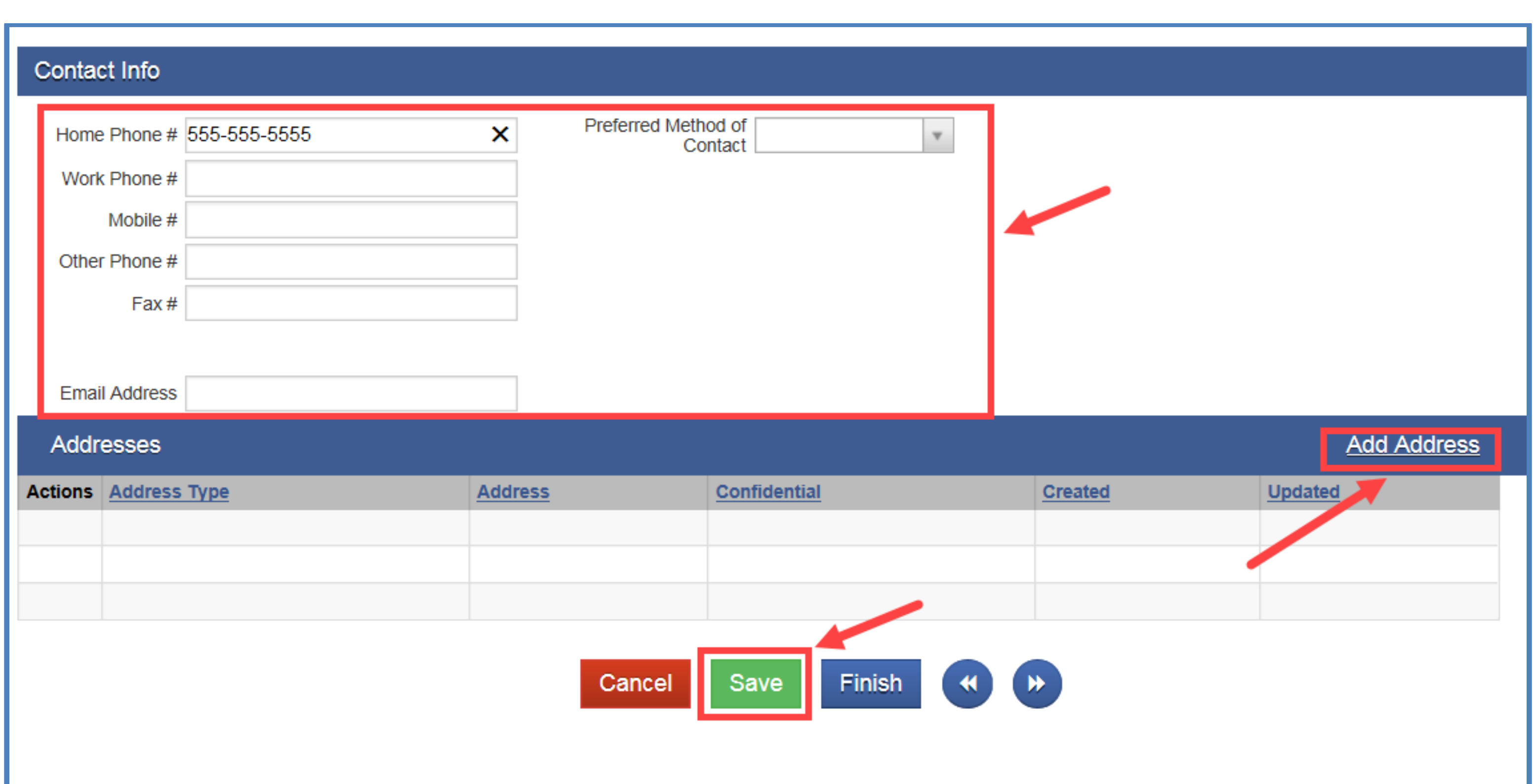


1. Complete the following fields.
   - Ethnicity – select client's ethnicity.
   - Races – select all applicable race(s) and move to Selected Races.
   - Special Needs – select all applicable special needs and move to Selected Special Needs.
   - Veteran Status – select client's veteran status.
2. Click Save and click .
3. The Contact Info page will display.

Contact Info

Do not delete the client's address. When a client's address changes, review the current address and change the Address Type to Previous Address.

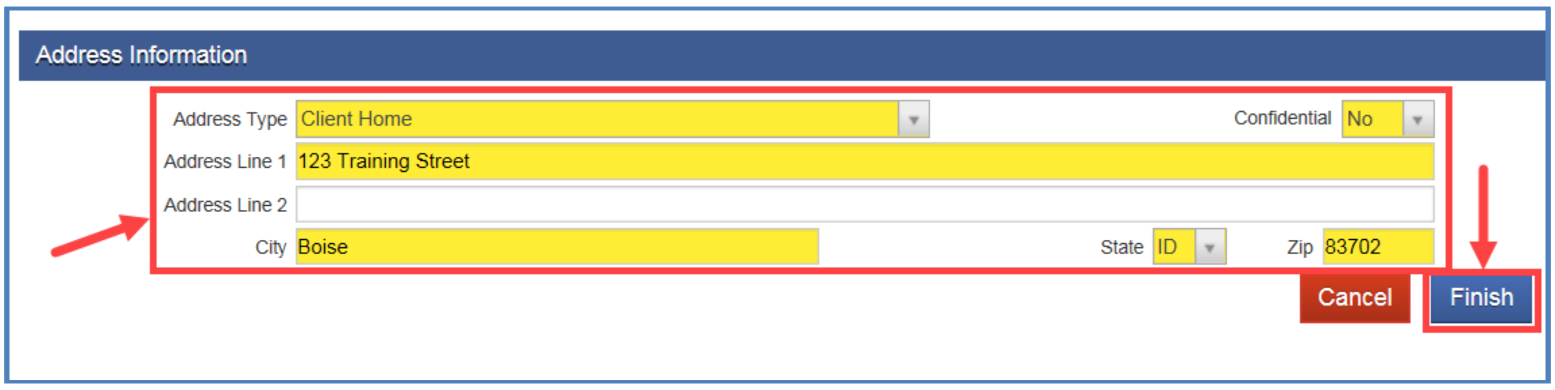
Enter all known contact information for the client.



1. Complete the following fields.
   - Phone # – enter at least one phone number.

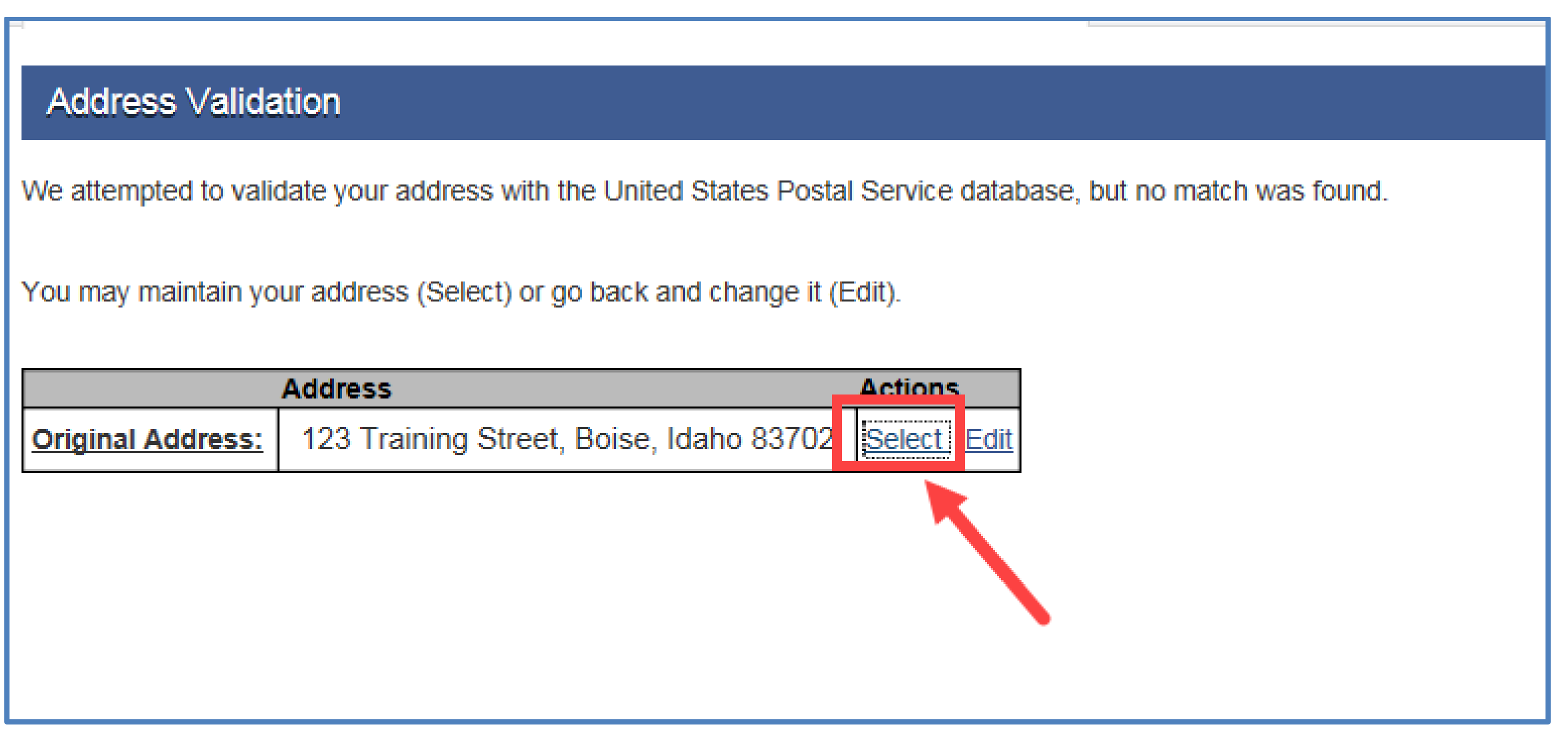
2. Click Save and click Add Address.

If the client is homeless, select address type “client unknown”, put “unknown” in the address line, and then fill in the city, state, and zip code.

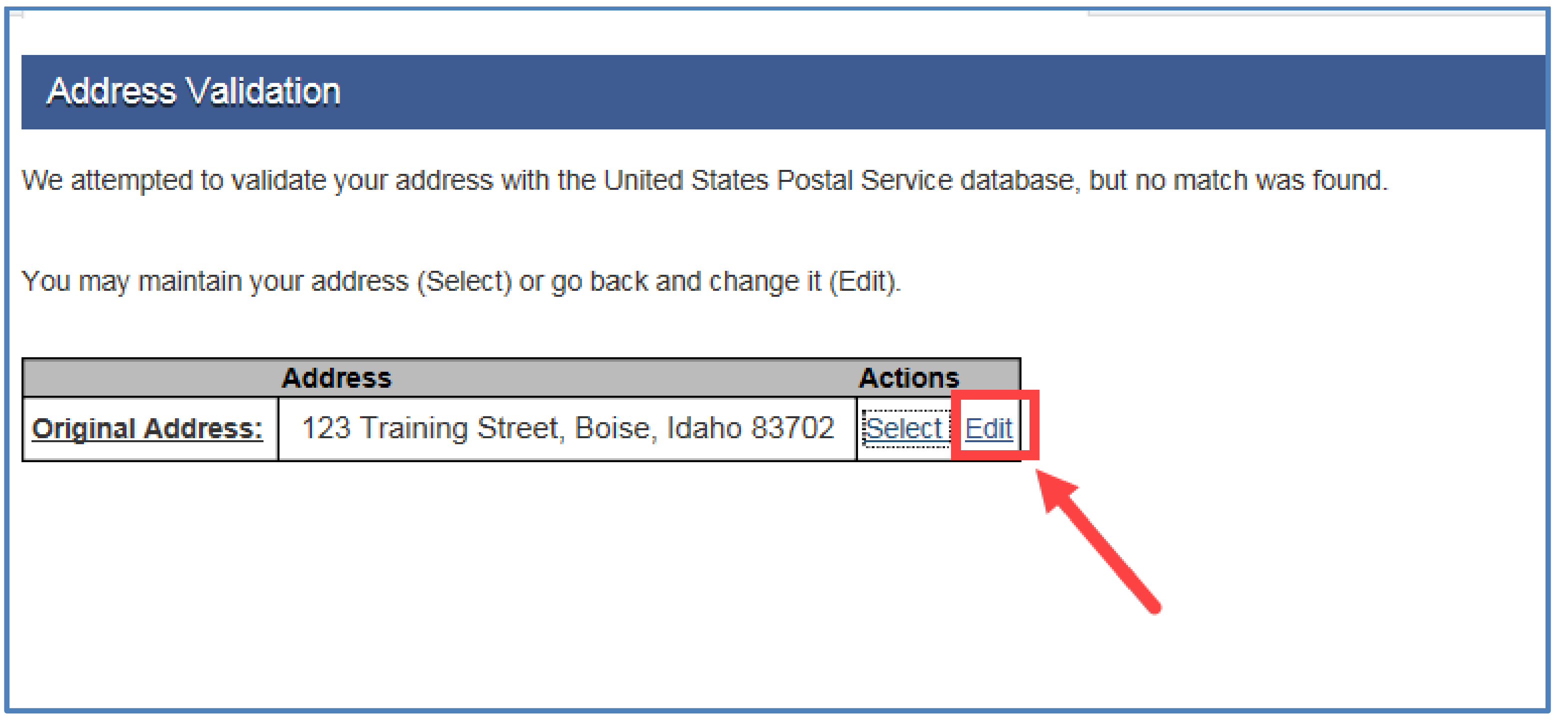


3. Complete the following fields.
   - Address Type – select client’s address type.
   - Confidential – select Yes or No.
   - Address Line 1 – enter client’s physical address.
   - Address Line 2 – enter additional physical address information.
   - City – enter client’s city.
   - State – the field will populate with ID.
   - Zip – enter client’s zip code.

4. Click Finish. WITS will check the address entered against the United States Postal Service database.



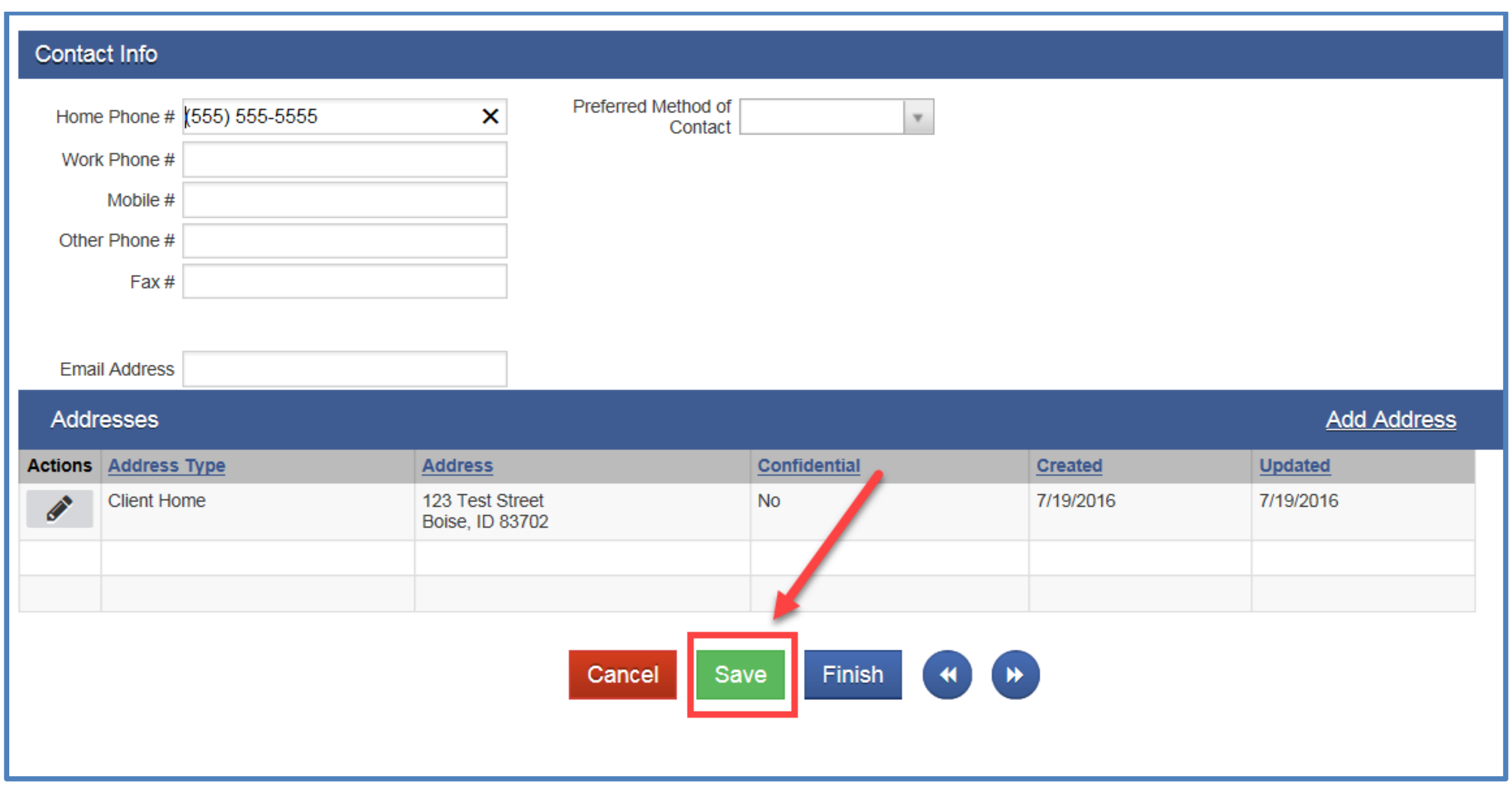
5. If the Address is located in the United States Postal Service database, then click Select next to the appropriate address.



6. When the Address is NOT located in the United States Postal Service database, click Select to select this address

OR

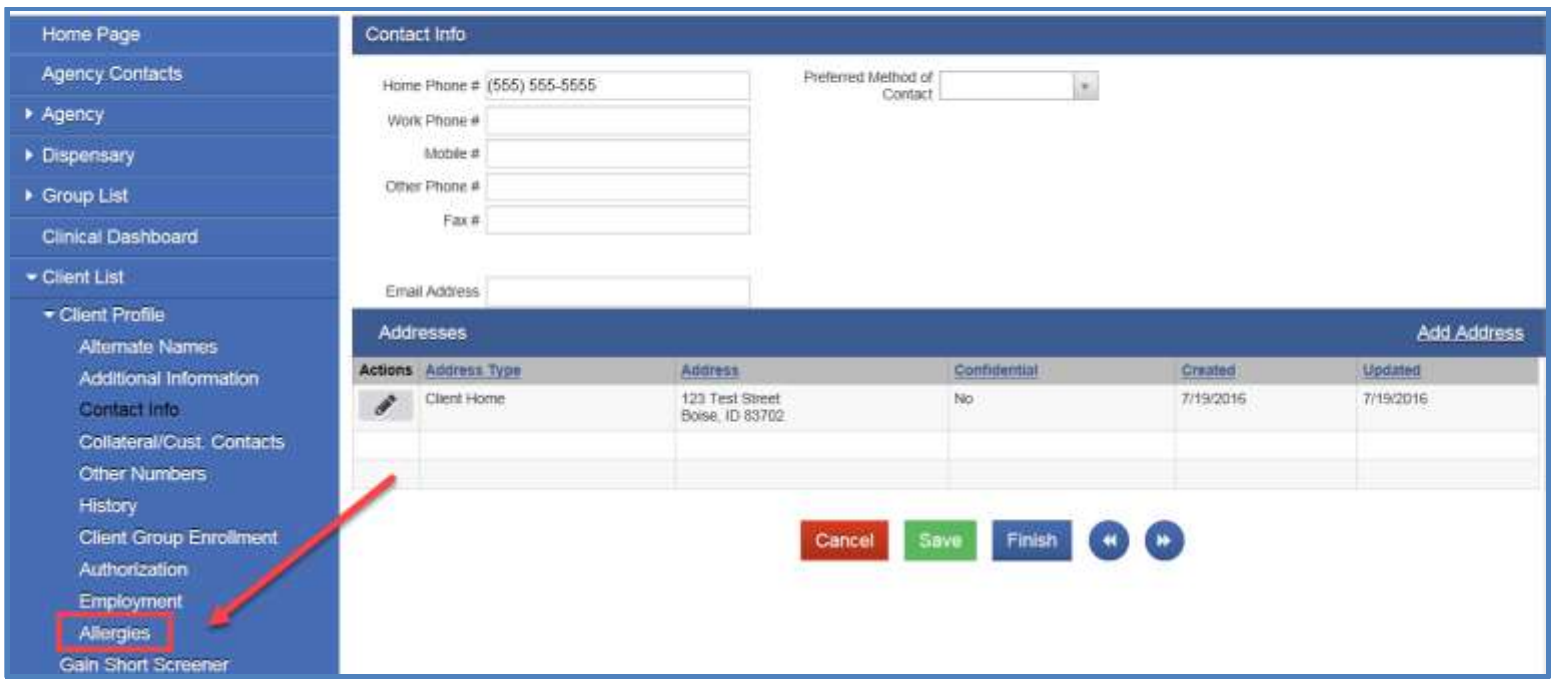
7. Click Edit to edit the address.



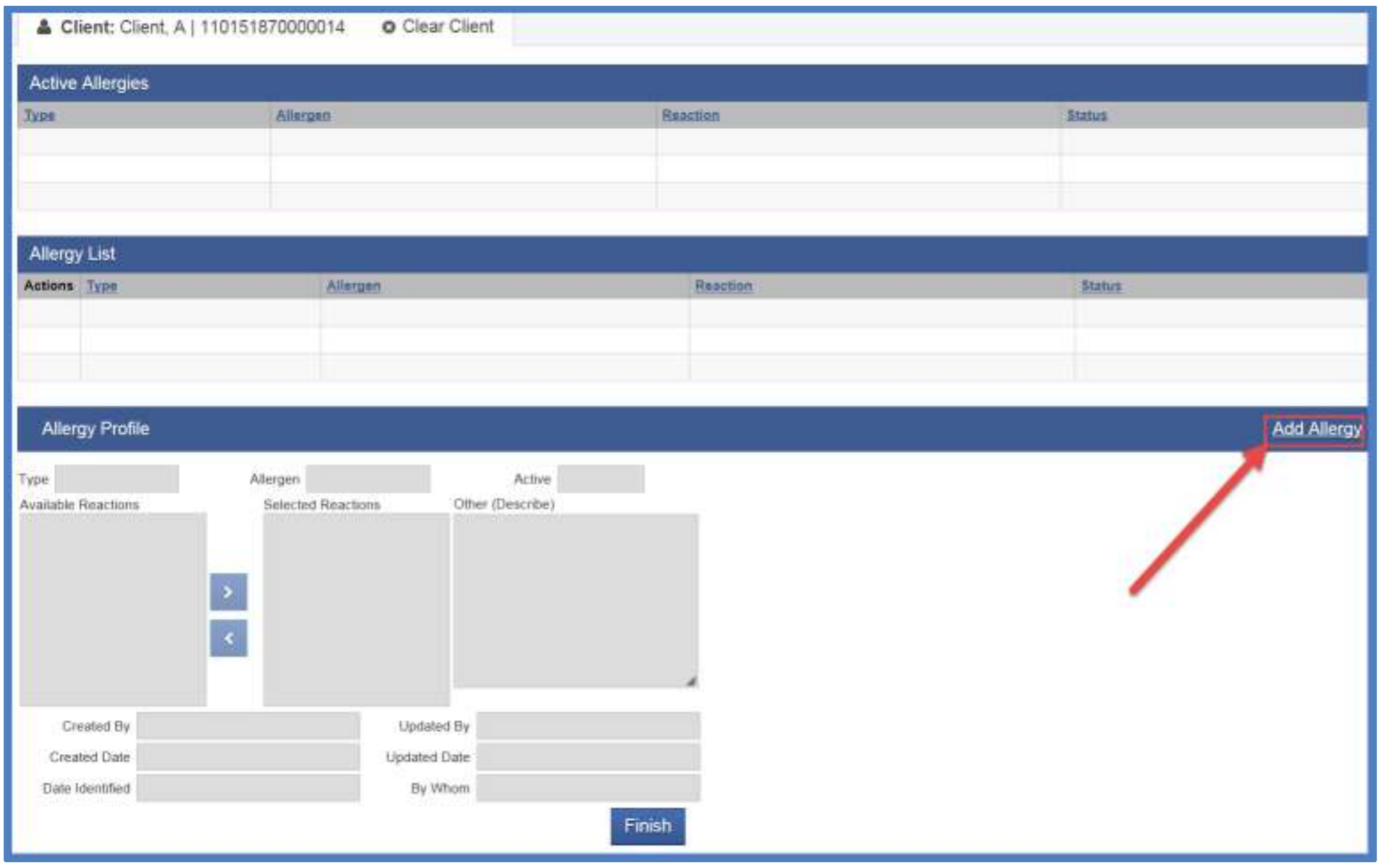
8. Click Save.

Allergies

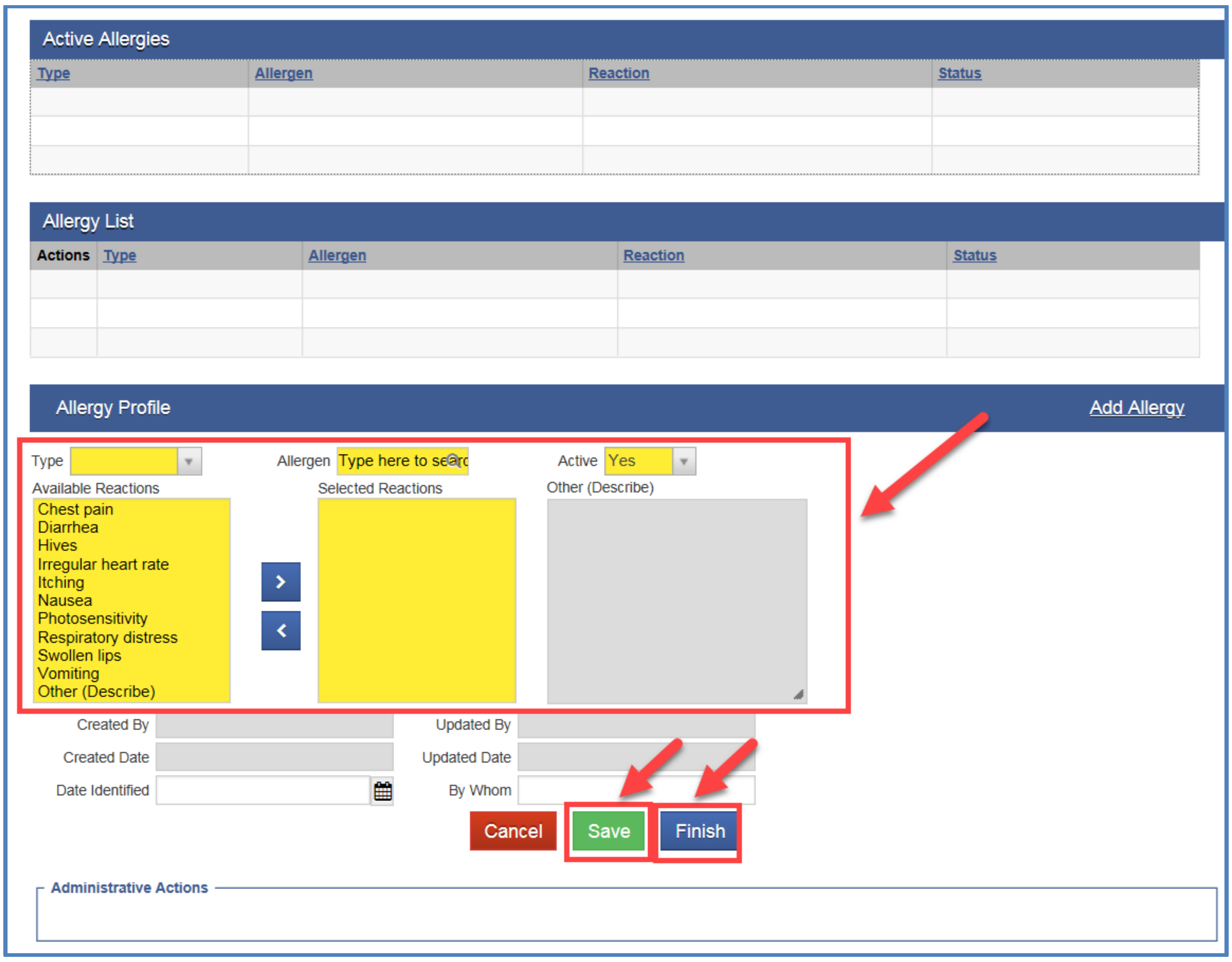
The Allergies screen tracks the client's allergies during an episode of care. The Active Allergy list displays only the active allergies. The Allergy List displays active and inactive allergies.



1. Click Allergies on the blue navigation pane.



2. Click. Add Allergy.

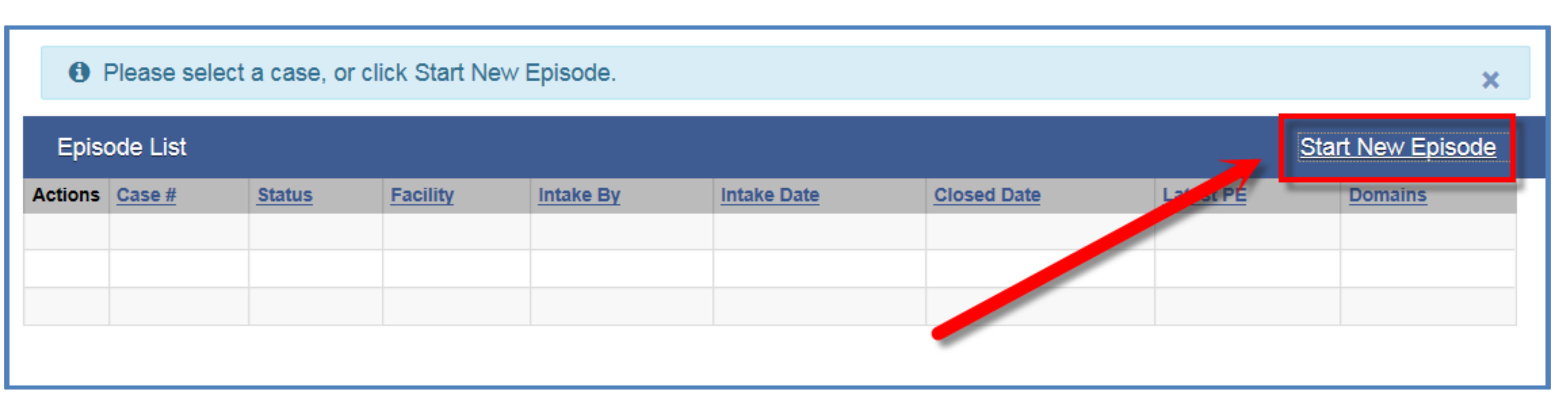


3. Complete the following fields.
   - Type – select the type of allergy.
   - Allergen – select the allergen.
   - Active – the field will populate with Yes. Update as needed.
   - Available Reactions – select all applicable reactions and move to Selected Reactions.
4. Click Save and click Finish.
5. Create the Intake. This starts the episode of care and is required before any client activities can be performed.

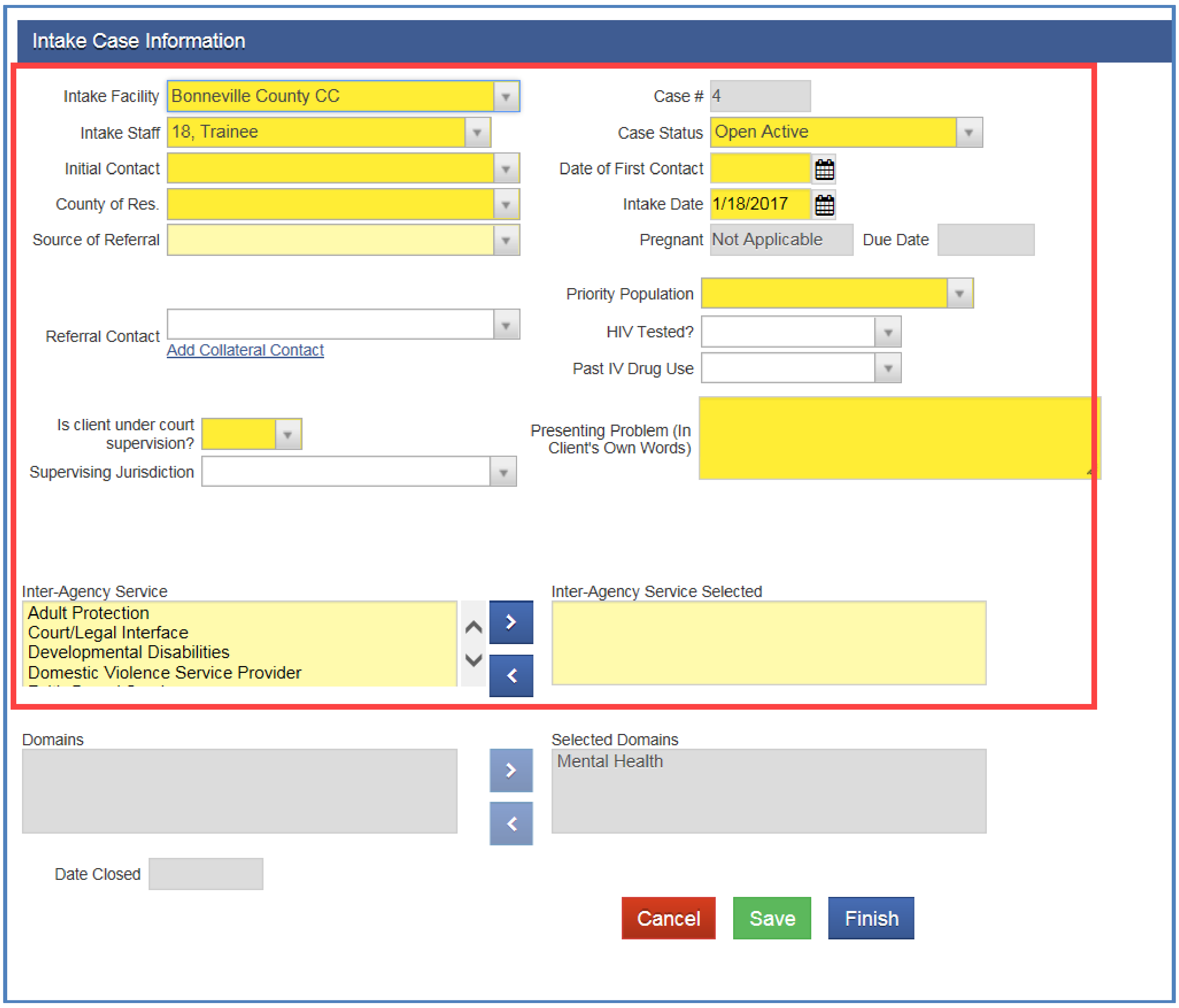
Creating an Intake (New Episode of Care or Case)

Each time a client comes into the BHCCC create a new Intake and a new Crisis Evaluation. For example, if a client comes to the BHCCC at 4:00 AM and leaves at 1:00 PM on 1/20/17 (this is one episode) and then returns to the BHCCC at 6:00 PM on 1/20/17 (this is one episode) so the client will have two episodes on 1/20/17.

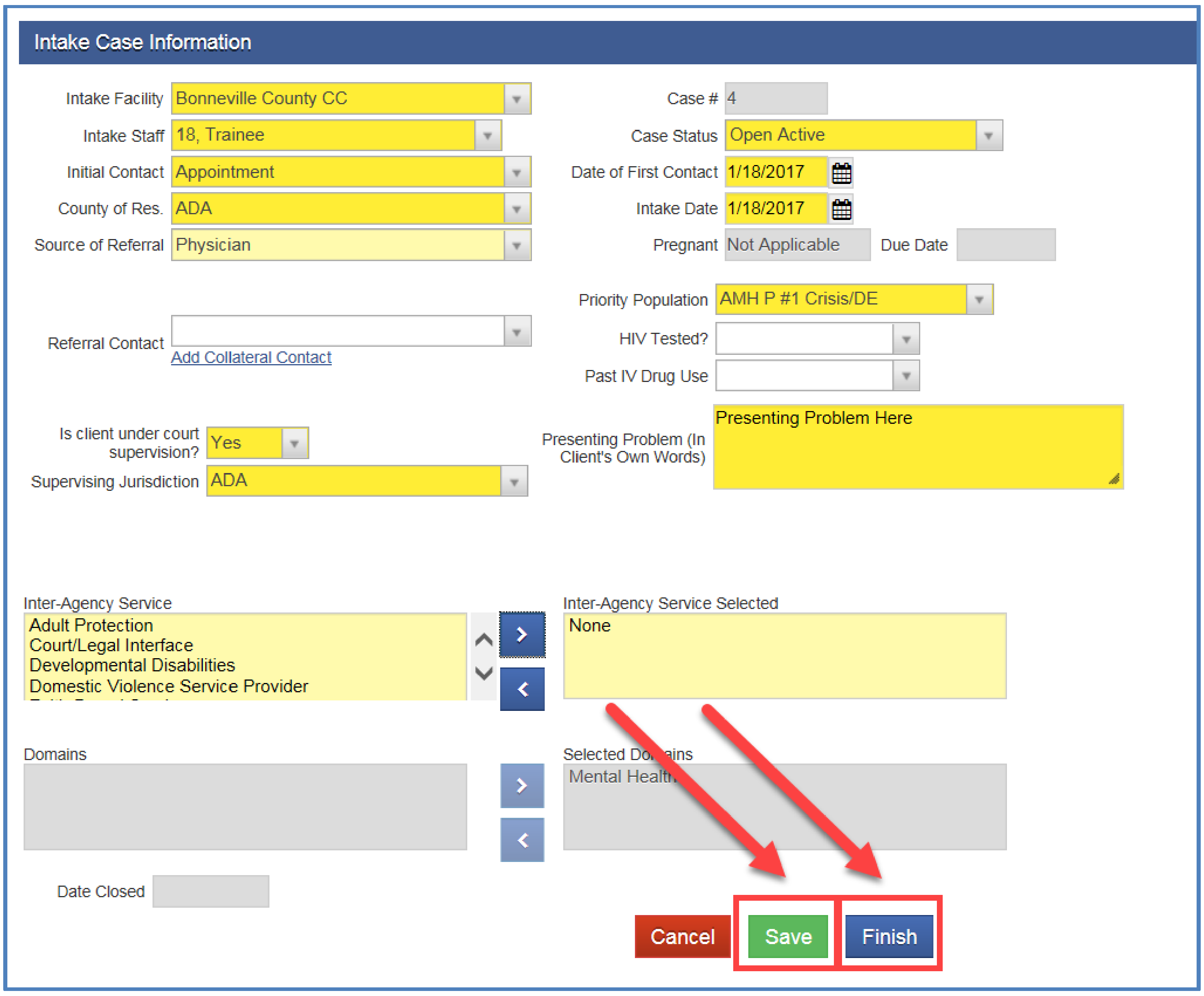
1. Begin on the Client Activity List. If you do not have any open episodes, the Episode list will display.



2. Click Start New Episode.



3. Complete the following fields.
   - Intake Facility – the field will populate with the facility selected at login (where the client is receiving services). Update as needed.
   - Intake Staff – the field will populate with the name of the person creating the Intake. Update as needed.
   - Case Status – the field will populate as Open Active.
   - Initial Contact – select type of initial contact.
   - Date of First Contact – enter the initial contact date.
   - County of Res – select county of residence.
   - Intake Date – the field will populate with today's date. Update as needed.
   - Source of Referral – select source of Referral.
   - Pregnant – select pregnant status. If the client is male, this field will be set as not applicable.
   - Due Date – enter due date of pregnancy. This field is required if Pregnant is YES.
   - Priority Population – **select AMH P #1 Crisis/DE**.
   - Is client under court supervision? – select Yes or No.
   - Supervising County – enter the supervising county. This field is required when Is client under court supervision is YES.
   - Presenting Problem – enter the presenting problem in the client's own words.
   - Inter-Agency Service – select all applicable inter-agency service(s) and move to Inter-Agency Service Selected.

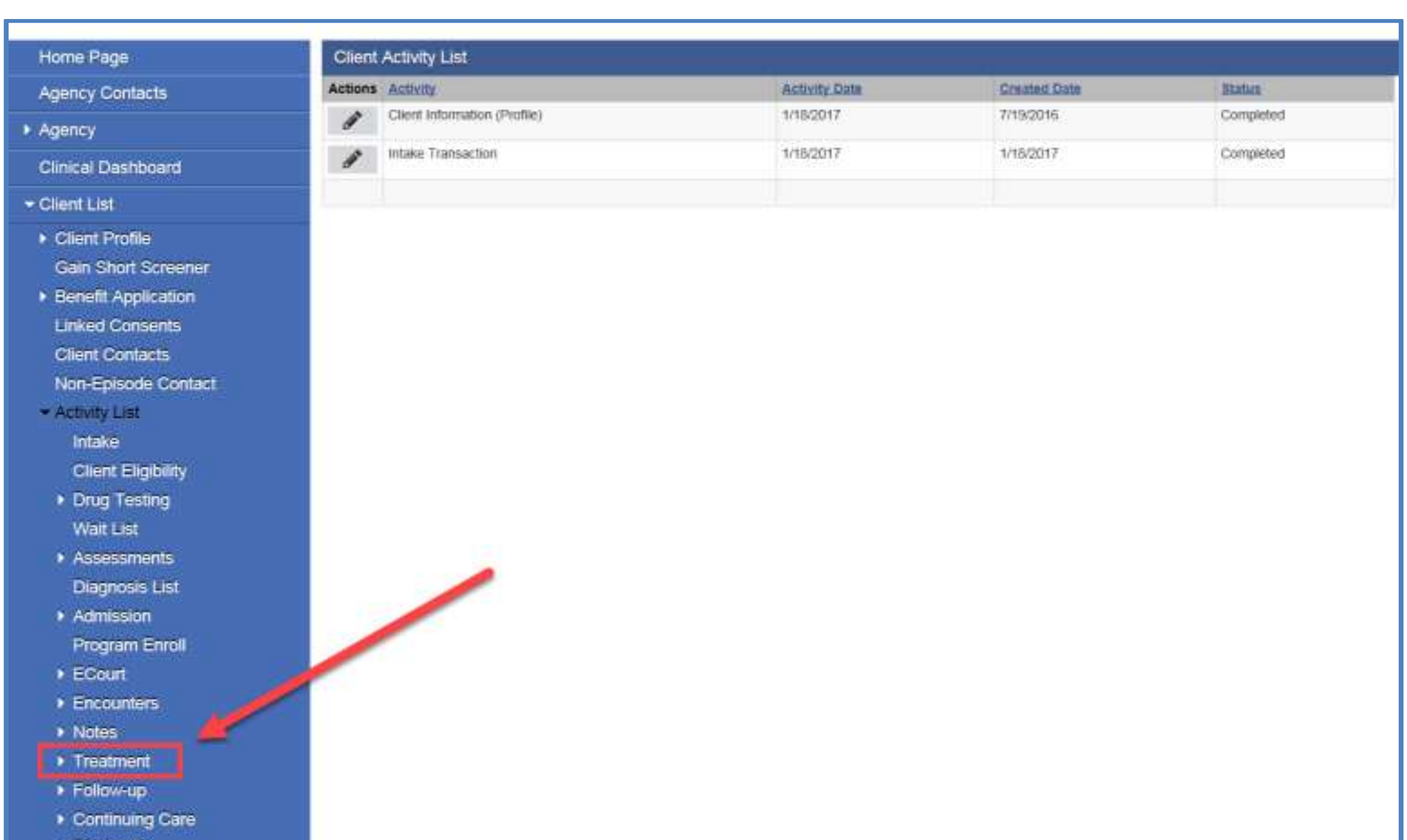


4. Click Save and Finish.

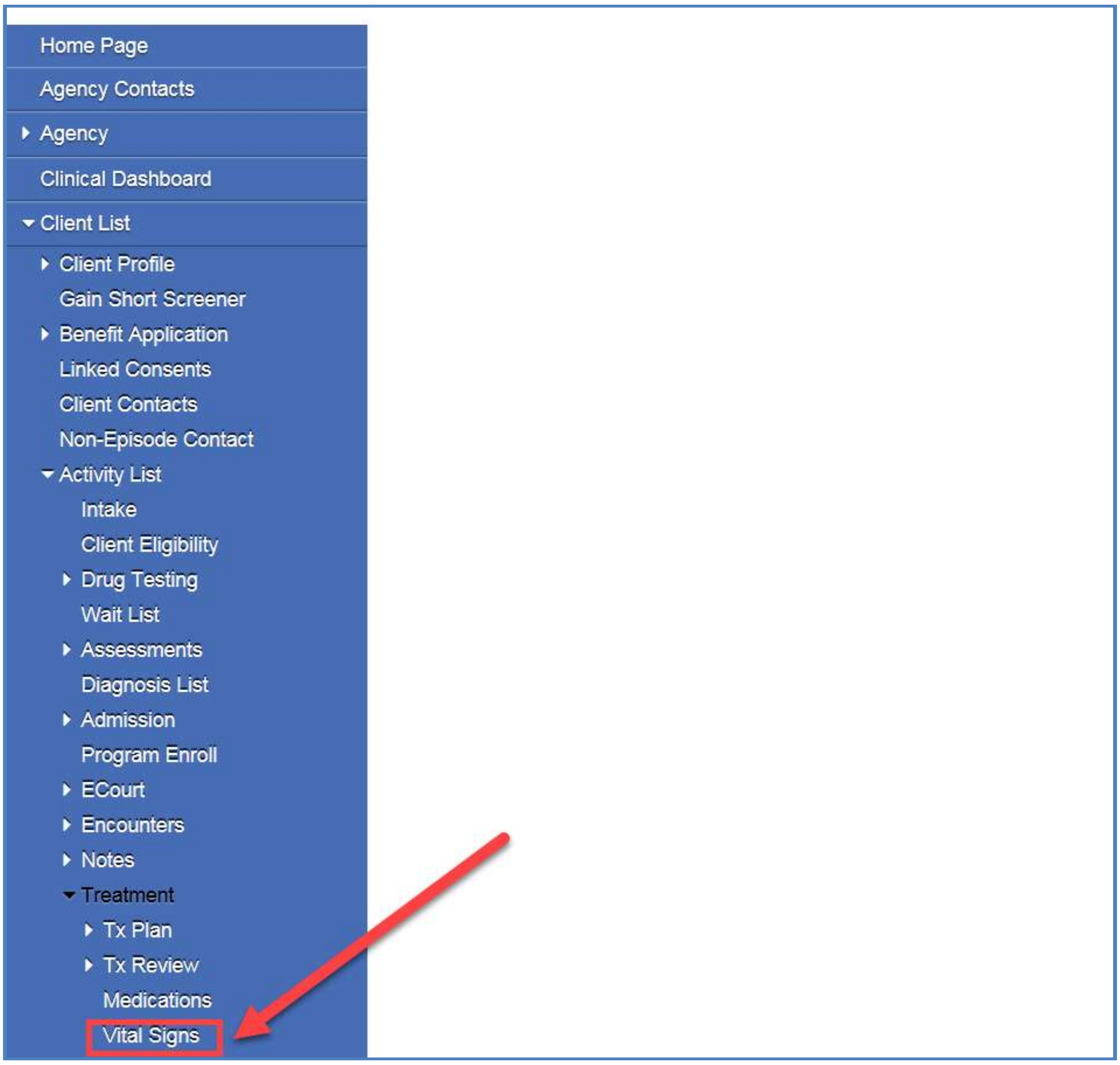
5. Create Vital Sign records through out the episode of care.

Creating a Vital Signs Record

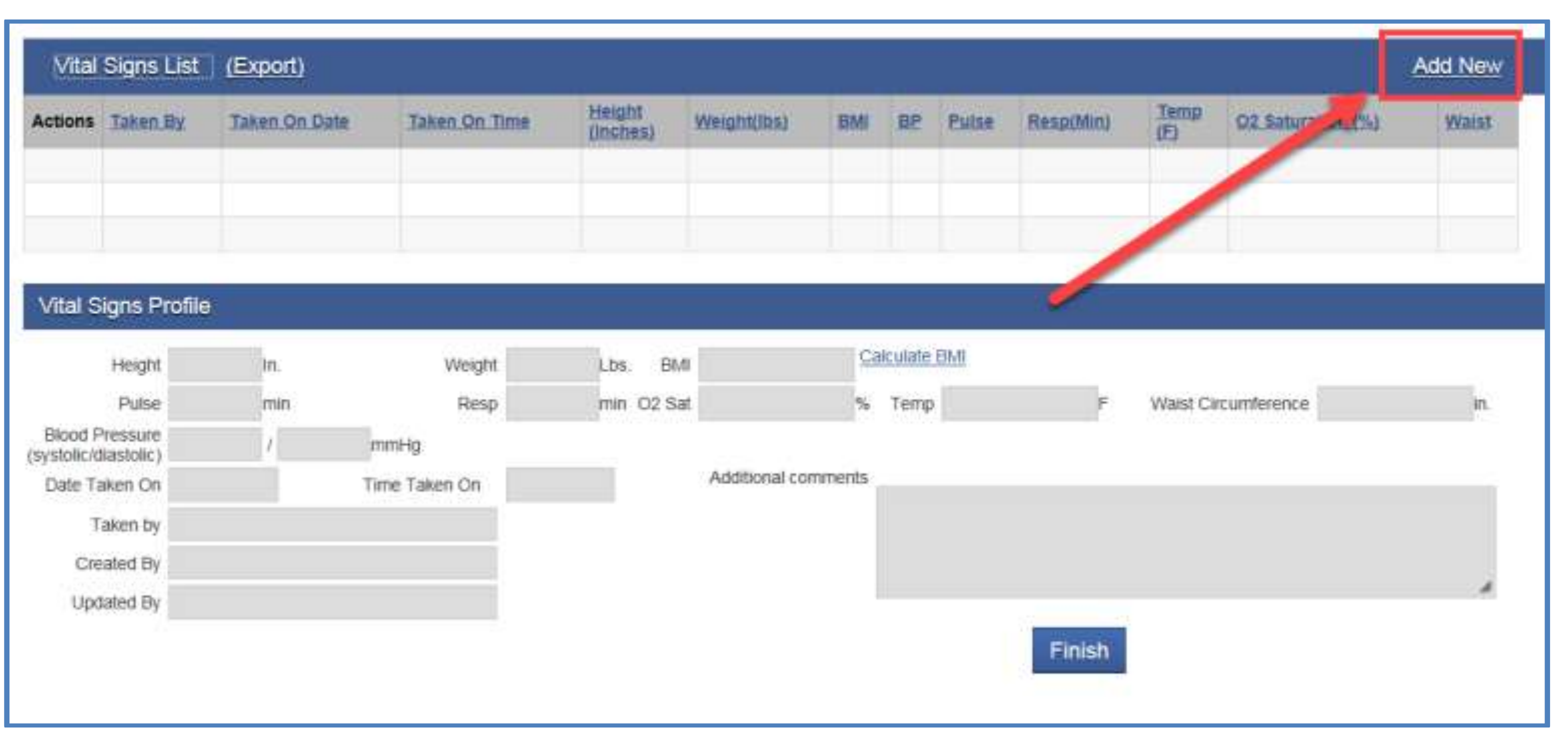
1. Begin on the Client Activity List.



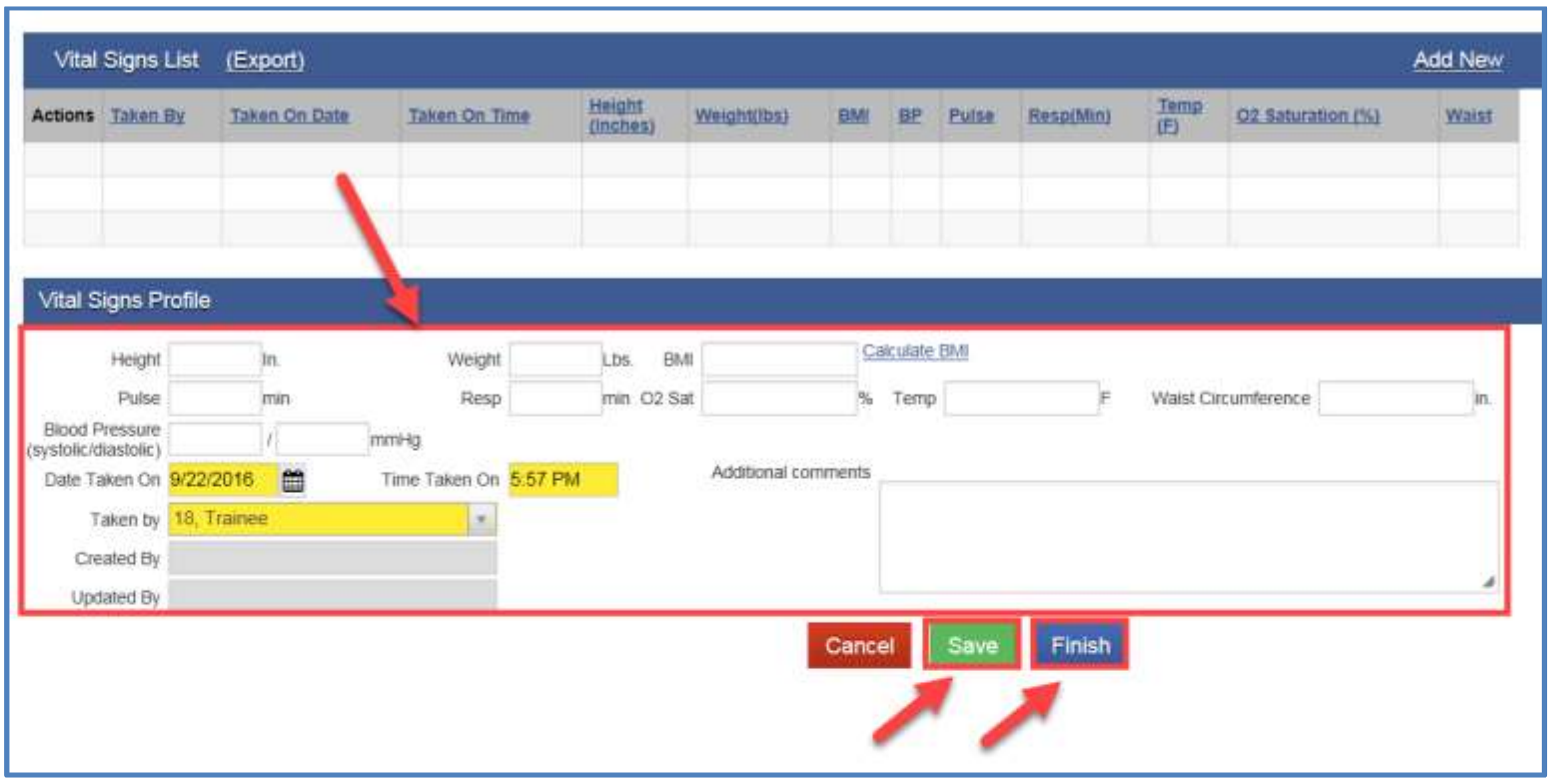
2. Once you're on the Activity List, click Treatment on the blue navigation pane.



3. Click Vital Signs.



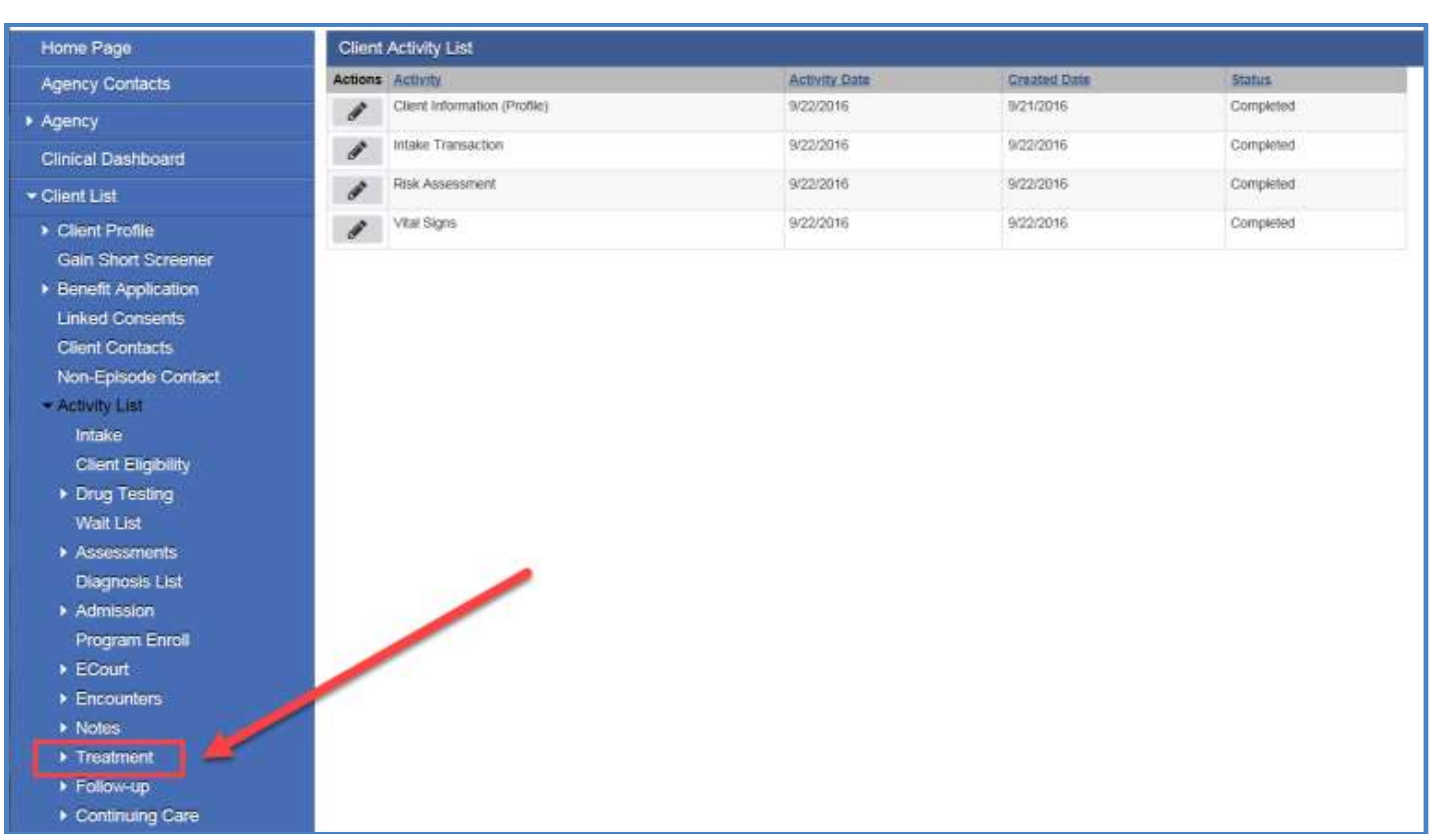
4. Click Add New.



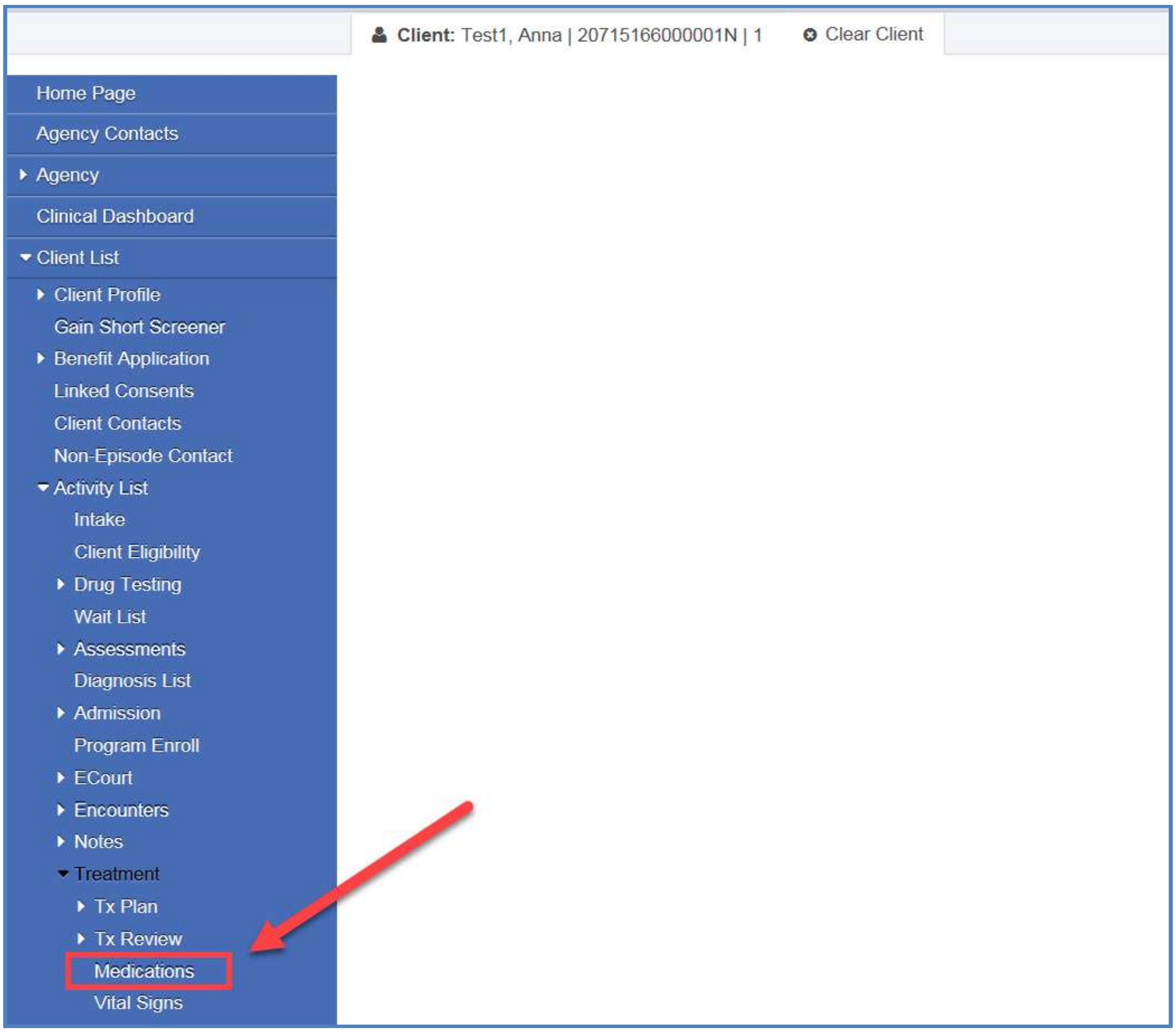
5. Complete the following fields as directed by your agency.
    - Height – enter height in inches.
    - Weight – enter weight in pounds.
    - BMI – click Calculate BMI .
    - Pulse – enter beats per minute.
    - Resp – enter respiratory.
    - O2 Sat – enter O2 sat percentage.
    - Temperature – enter temperature.
    - Waist Circumference – enter waist circumference in inches.
    - Blood Pressure – enter systolic and diastolic.
    - Date taken on – the field will populate with today's date. Update as needed.
    - Time taken on – the field will populate with the time the record was created. Update as needed.
    - Performed by – the field will populate with the name of the person creating the vital signs record. Update as needed.
6. Click Save and Finish .
7. Create a Medication Record to document he client's medications.

Adding a Medication to the Medication List

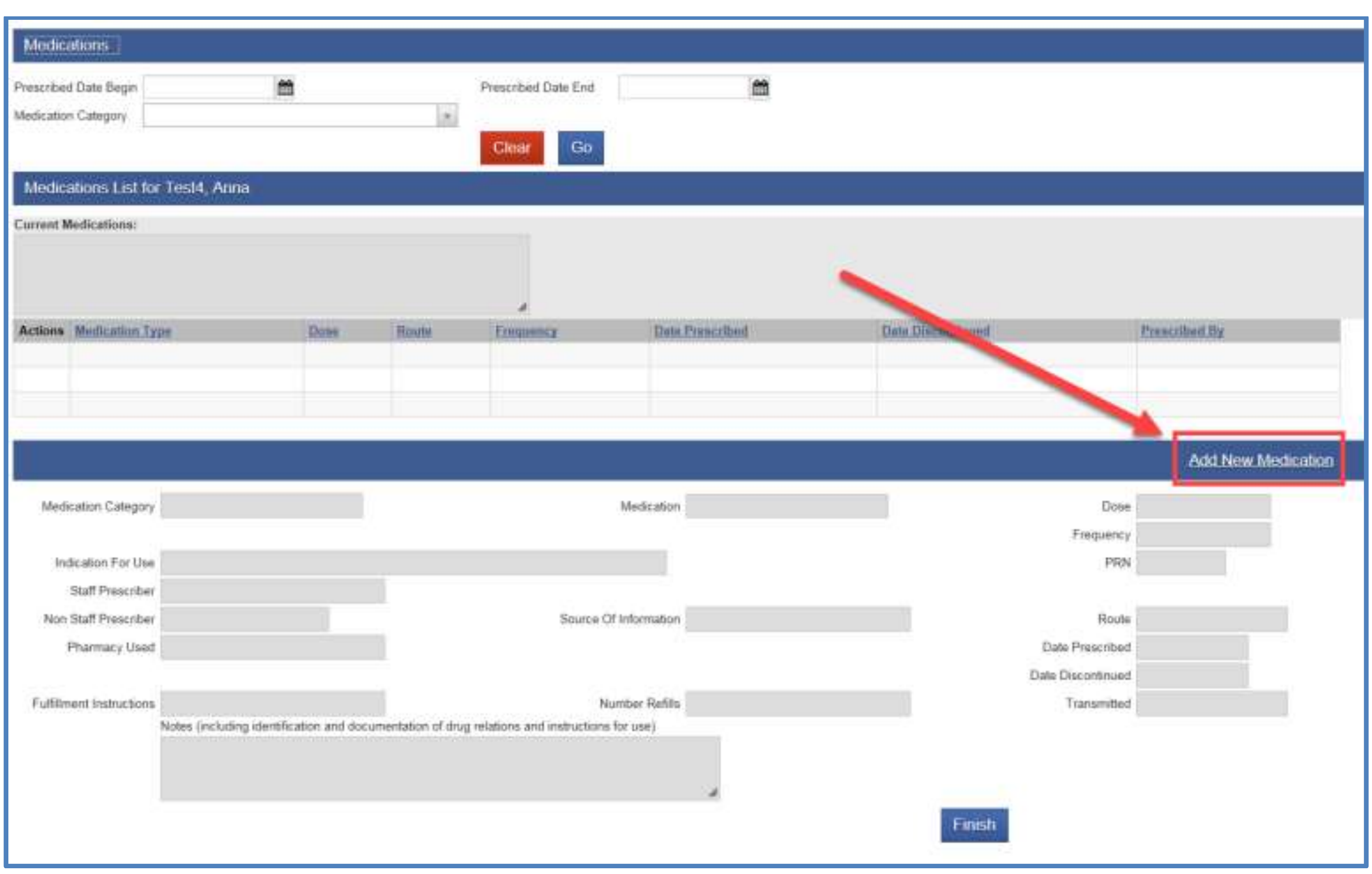
1. Begin on the Client Activity List.



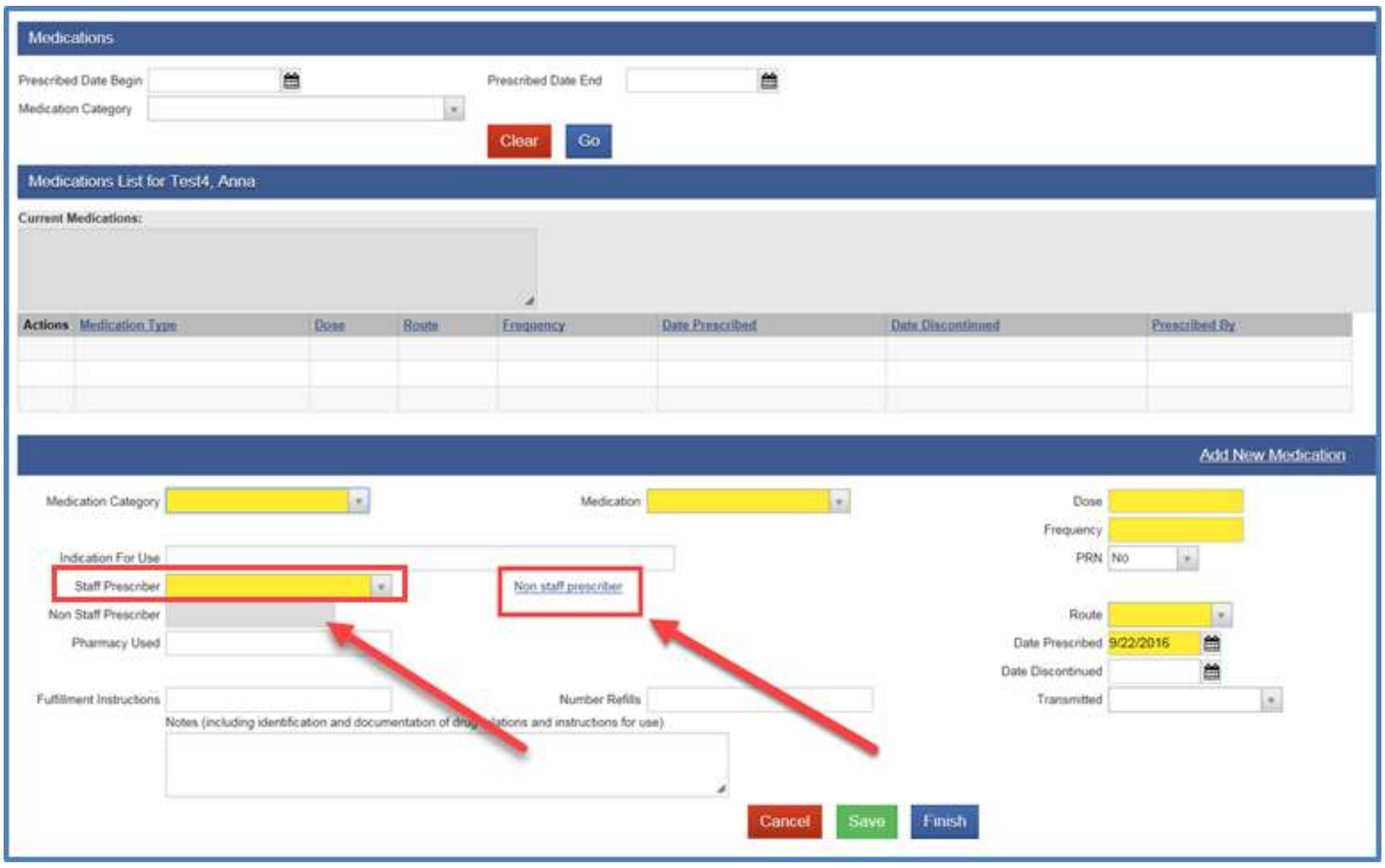
2. Once you're on the Activity List, click ▸ Treatment on the blue navigation pane.



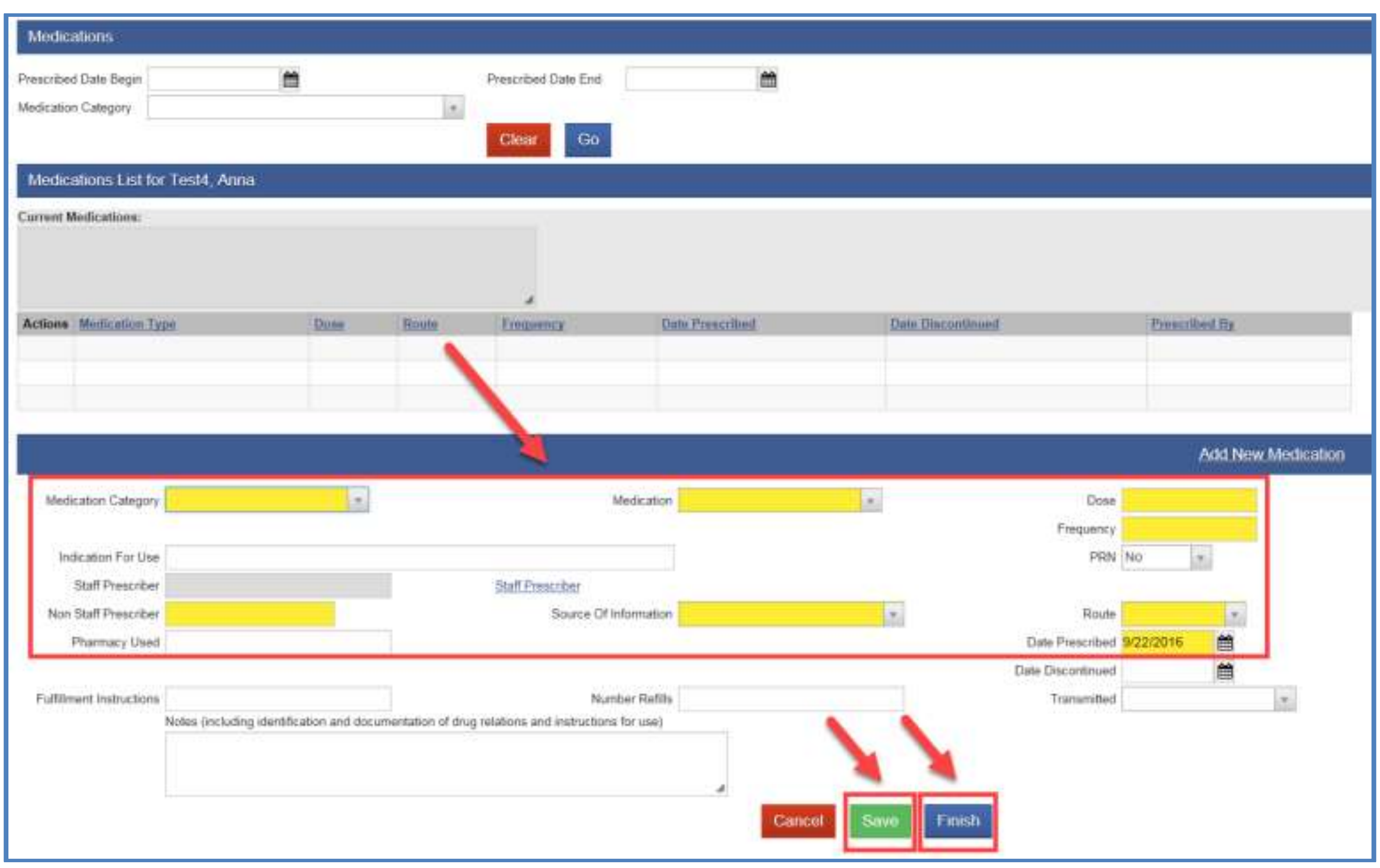
3. Click Medications on the blue navigation pane.



4. Click Add New Medication.



5. If the medication was prescribed by a staff member, select his or her name in the Staff Prescriber field. Otherwise, click Non staff prescriber .

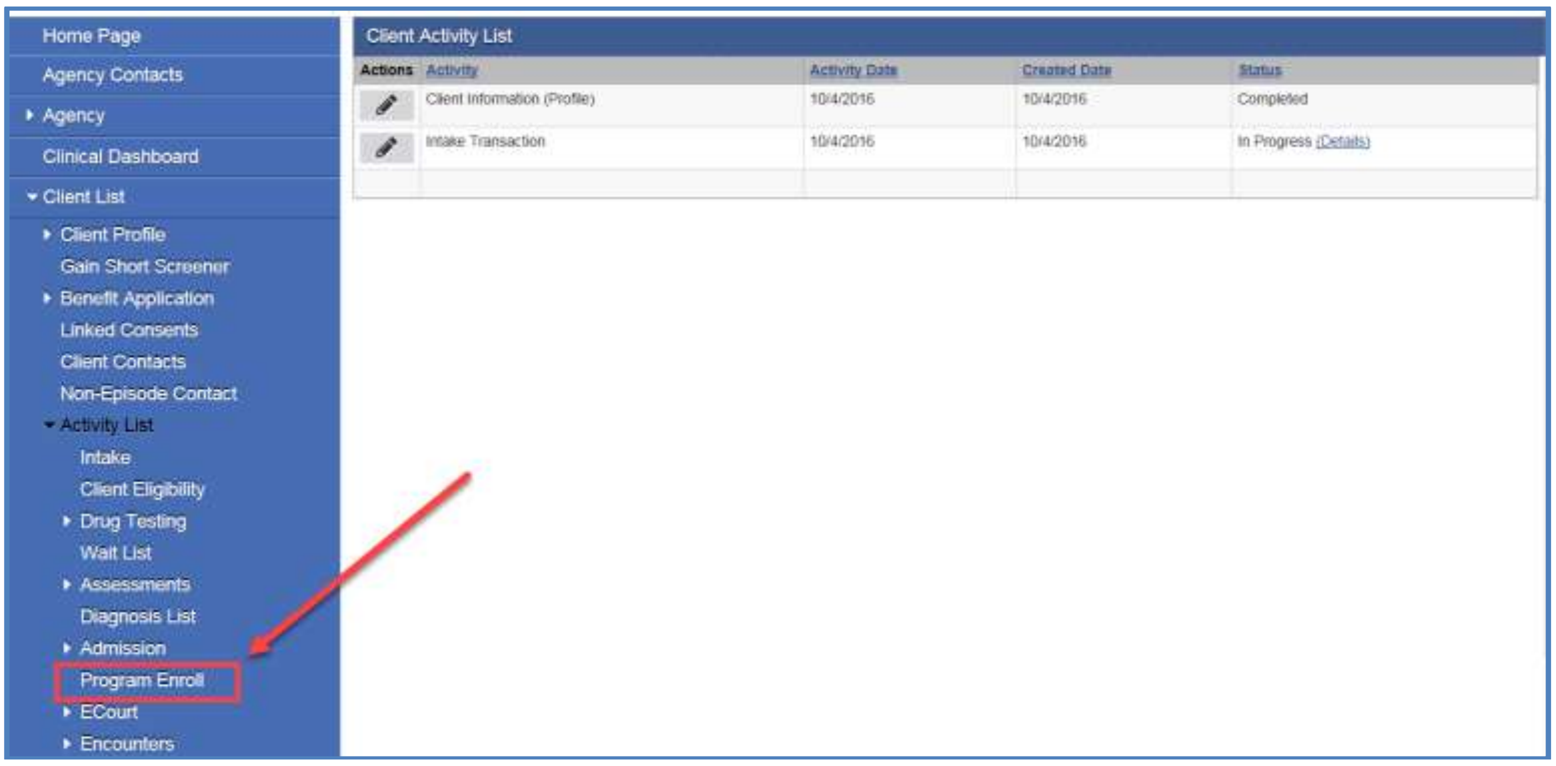


6. Complete the following fields.
    - Medication Category – select the medication category.
    - Medication – the field will populate based on the medication category selected. Select the medication name.
    - Dose – enter the dosage.
    - Frequency – enter the frequency.
    - Non Staff Prescriber – enter the name of the prescriber.
    - Source of Information – select the source of the information of the prescription.
    - Route – select the route.
    - Date Prescribed – the field will populate with today's date. Update as needed.
7. Click Save and Finish .
8. Create the Crisis Program Enrollment.

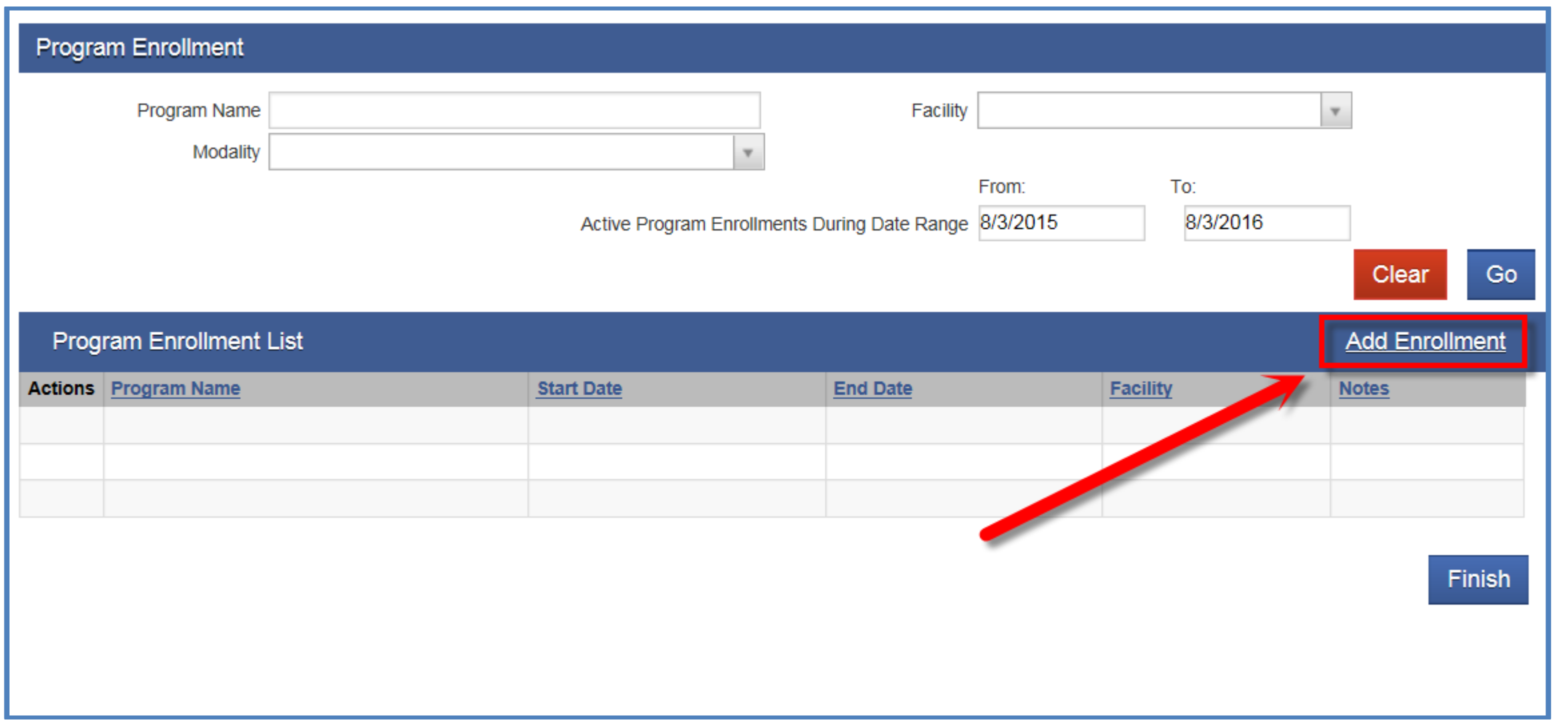
Creating a Crisis Program Enrollment

Only one Crisis Program Enrollment is allowed in each episode of care.

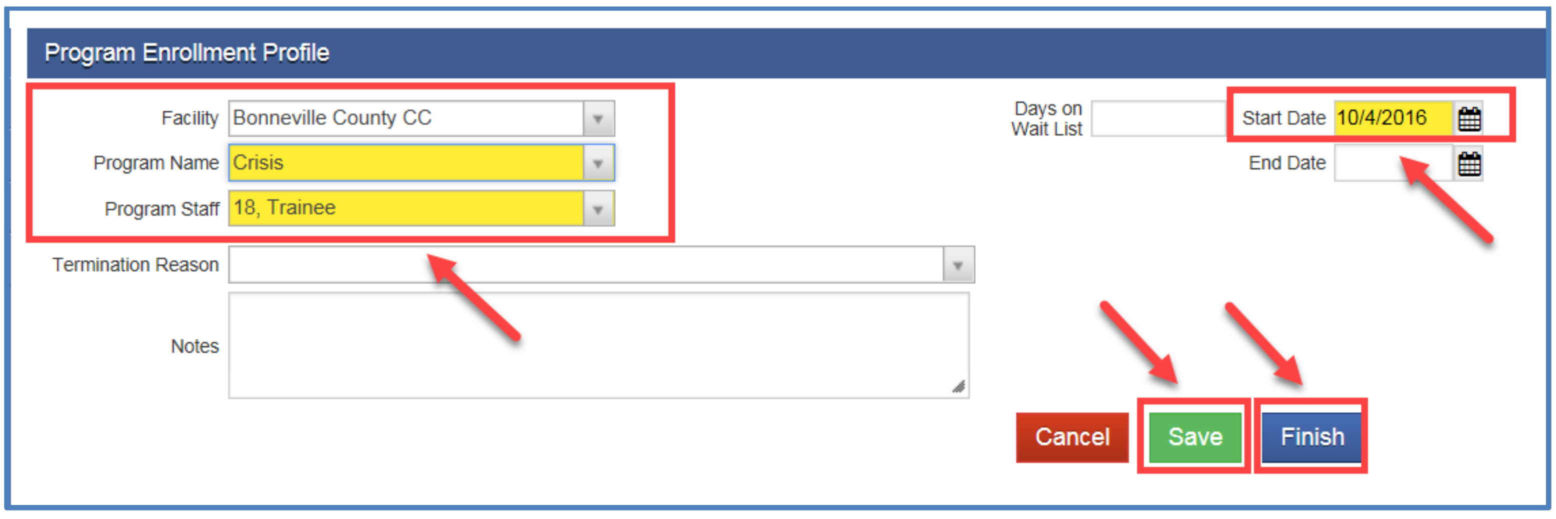
1. Begin on the Client Activity List.



2. Once you're on the Client Activity List, click Program Enroll on the blue navigation pane.



3. Click Add Enrollment.

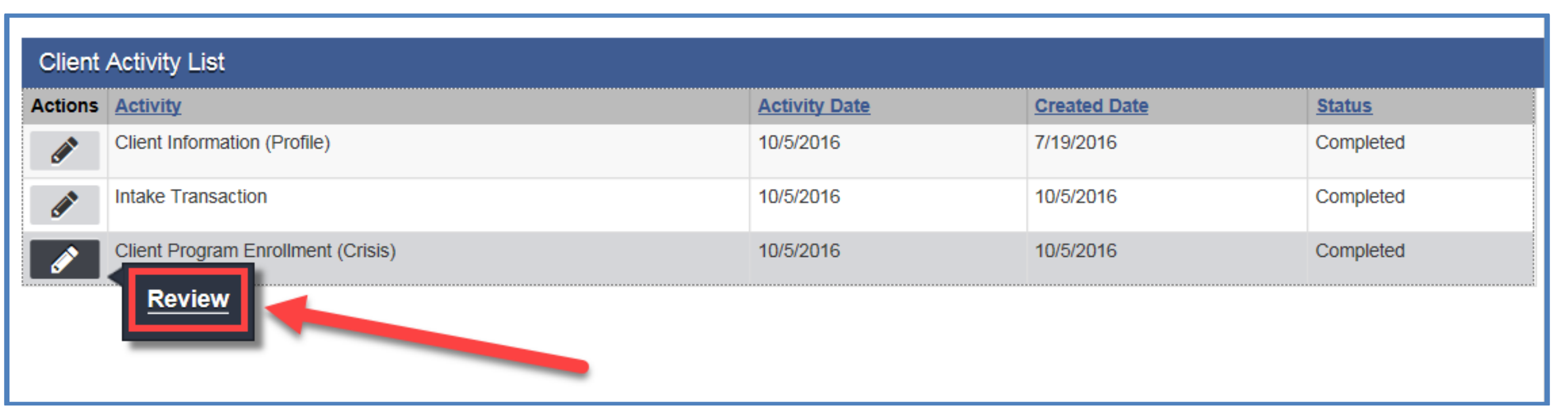


4. Complete the following fields.
   - Facility – the field will populate with the facility selected on the Intake (where the client is receiving services).
   - Program Name – select Crisis.
   - Program Staff – the field will populate with the name of the person creating the Program Enrollment. Update as needed.
   - Start Date – the field will populate with today's date. Update as needed.
5. Click Save and Finish.
6. Clicking Save will immediately open the Crisis Evaluation.
7. Start the Crisis Evaluation

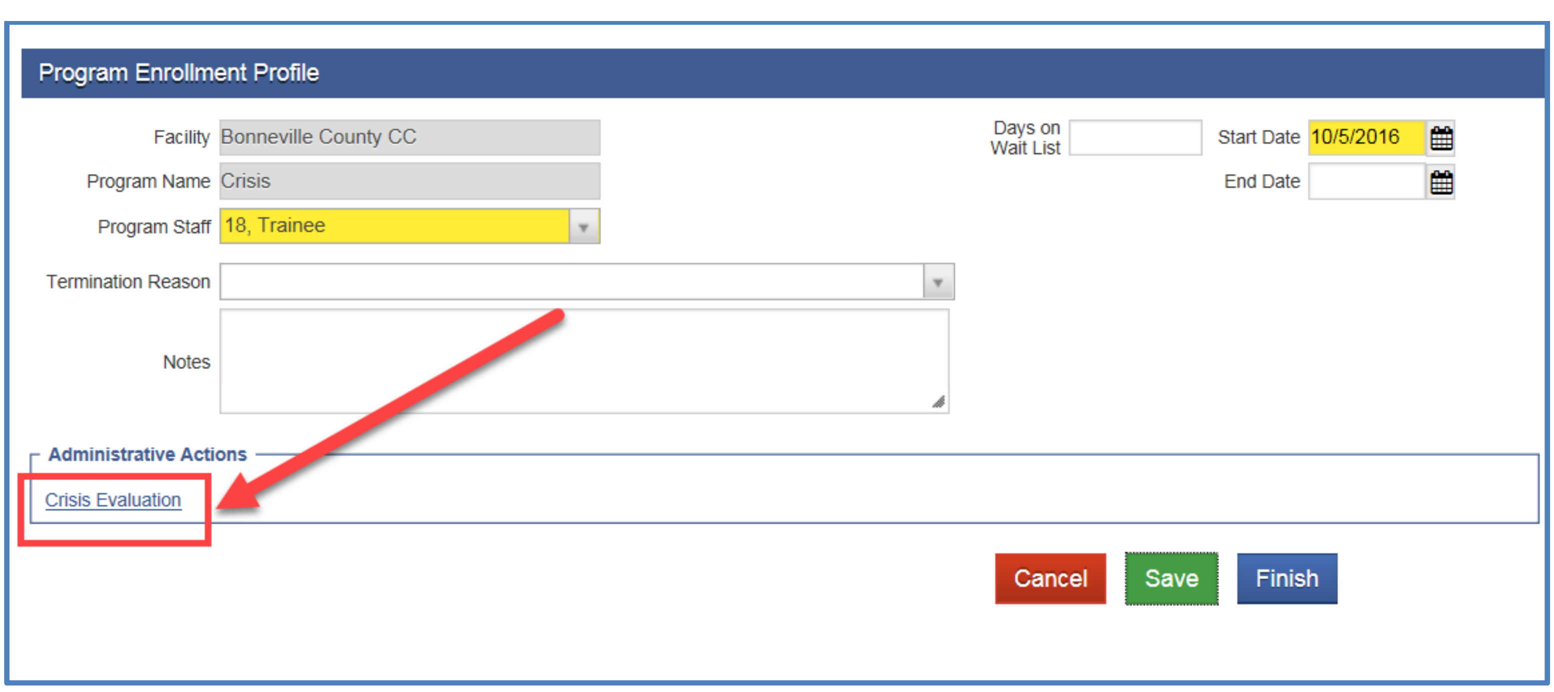
Creating a Crisis Evaluation

Only one Crisis Evaluation is allowed in each episode of care. Each time a client comes into the BHCCC create a new Intake and a new Crisis Evaluation. For example, if a client comes to the BHCCC at 4:00 AM and leaves at 1:00 PM on 1/20/17 (this is one Intake and one Crisis Evaluation) and then returns to the BHCCC at 6:00 PM on 1/20/17 (this is separate Intake and Crisis Evaluation) so the client will have two episodes (Intakes) on 1/20/17.

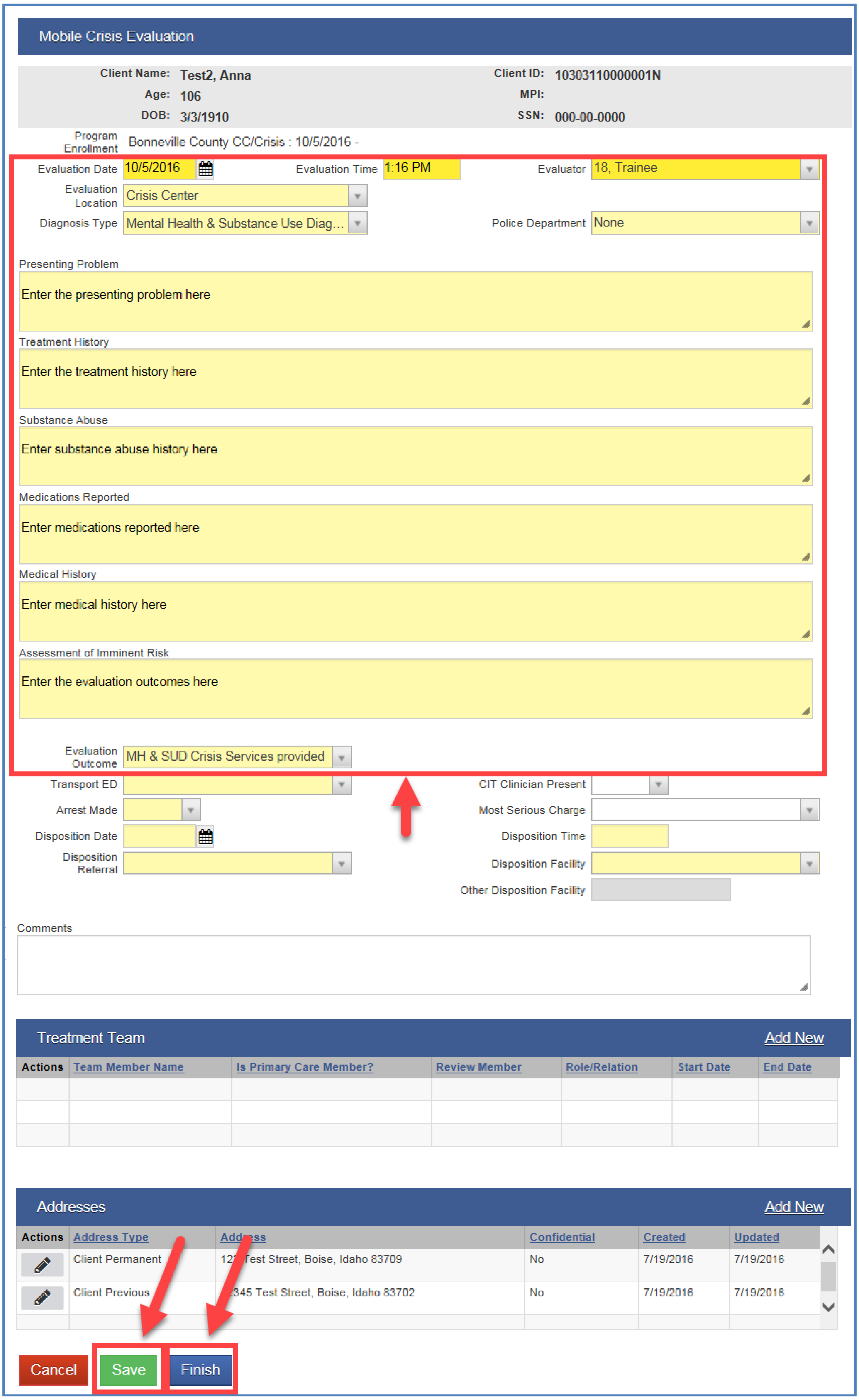
1. Begin on the Client Activity List.



2. Once you're on the Client Activity List, hover over the pencil icon and click Review under Actions for the Crisis Program Enrollment.

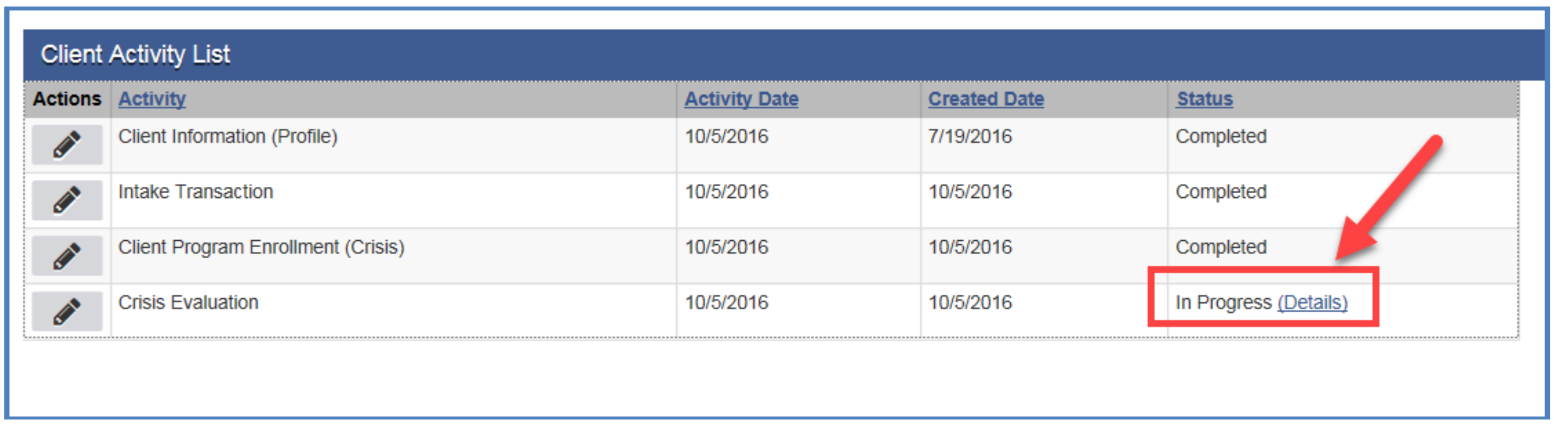


3. Click Crisis Evaluation under Administrative Actions.


Mobile Crisis Evaluation
Client Name: Test2, Anna
Age: 106
DOB: 3/3/1910
Client ID: 10303110000001N
MPI:
SSN: 000-00-0000
Program Enrollment
Bonneville County CC/Crisis : 10/5/2016 -
Evaluation Date
10/5/2016
Evaluation Time
1:16 PM
Evaluator
18, Trainee
Evaluation Location
Crisis Center
Diagnosis Type
Mental Health & Substance Use Diag...
Police Department
None
Presenting Problem
Enter the presenting problem here
Treatment History
Enter the treatment history here
Substance Abuse
Enter substance abuse history here
Medications Reported
Enter medications reported here
Medical History
Enter medical history here
Assessment of Imminent Risk
Enter the evaluation outcomes here
Evaluation Outcome
MH & SUD Crisis Services provided
Transport ED
CIT Clinician Present
Arrest Made
Most Serious Charge
Disposition Date
Disposition Time
Disposition Referral
Disposition Facility
Other Disposition Facility
Comments
Treatment Team
Add New
Actions
Team Member Name
Is Primary Care Member?
Review Member
Role/Relation
Start Date
End Date
Addresses
Add New
Actions
Address Type
Address
Confidential
Created
Updated
Client Permanent
No
7/19/2016
7/19/2016
Client Previous
No
7/19/2016
7/19/2016
Cancel
Save
Finish

4. Complete the following fields.
   - Evaluation Date – the field will populate with today's date. **Update to the start date for the client at the BHCCC.**
   - Evaluation Time– the field will populate with the time the record is created. **Update to the start time for the client at the BHCCC.**
   - Evaluator – the field will populate with the name of the person creating the Crisis Evaluation. Update as needed.
   - Evaluation Location – select BHCCC.
   - Diagnosis Type – **select the diagnosis type after the evaluation is complete**.
   - Police Department – select the involved police department or N/A when the client comes to the BHCCC.
   - Presenting Problem – enter presenting problem.
   - Treatment History – enter treatment history.
   - Substance Abuse – enter substance abuse history.
   - Medication Reported – enter mediation reported.
   - Medical History – enter medical history.
   - Assessment of Imminent Risk – **enter the evaluation outcomes.**
   - Evaluation Outcome – select the outcome of the evaluation.

5. Click Save and Finish.



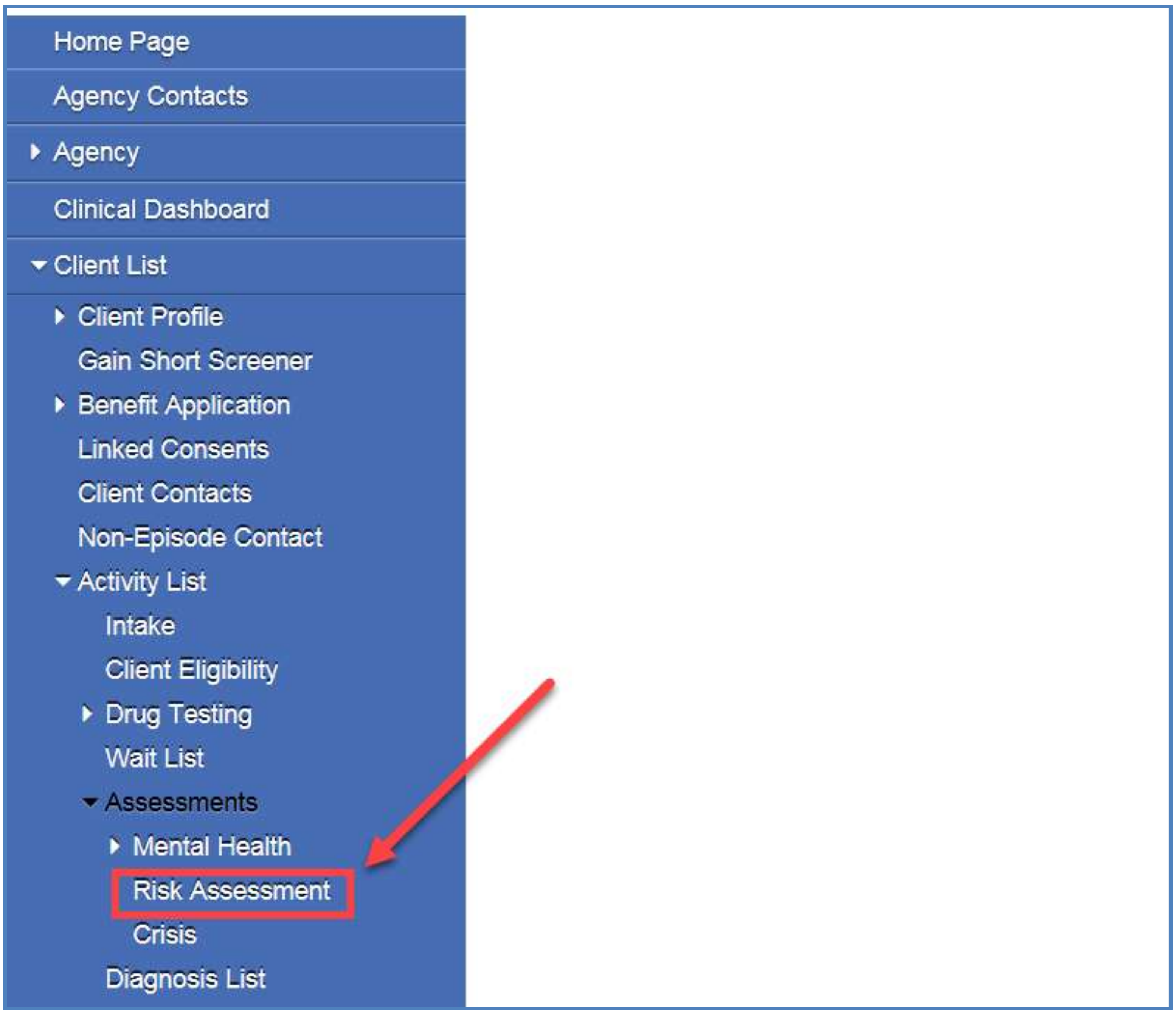
6. The Crisis Evaluation will stay in the status of In Progress until the client is leaving the BHCCC. The status can be seen from the Activity List

7. Create a Risk Assessment.

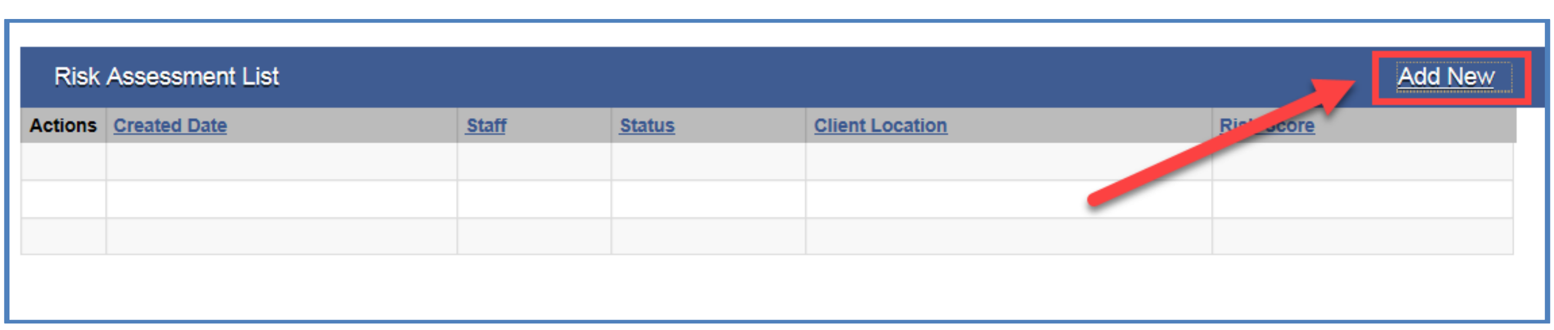
Create a Risk Assessment

1. Begin on the Client Activity List.

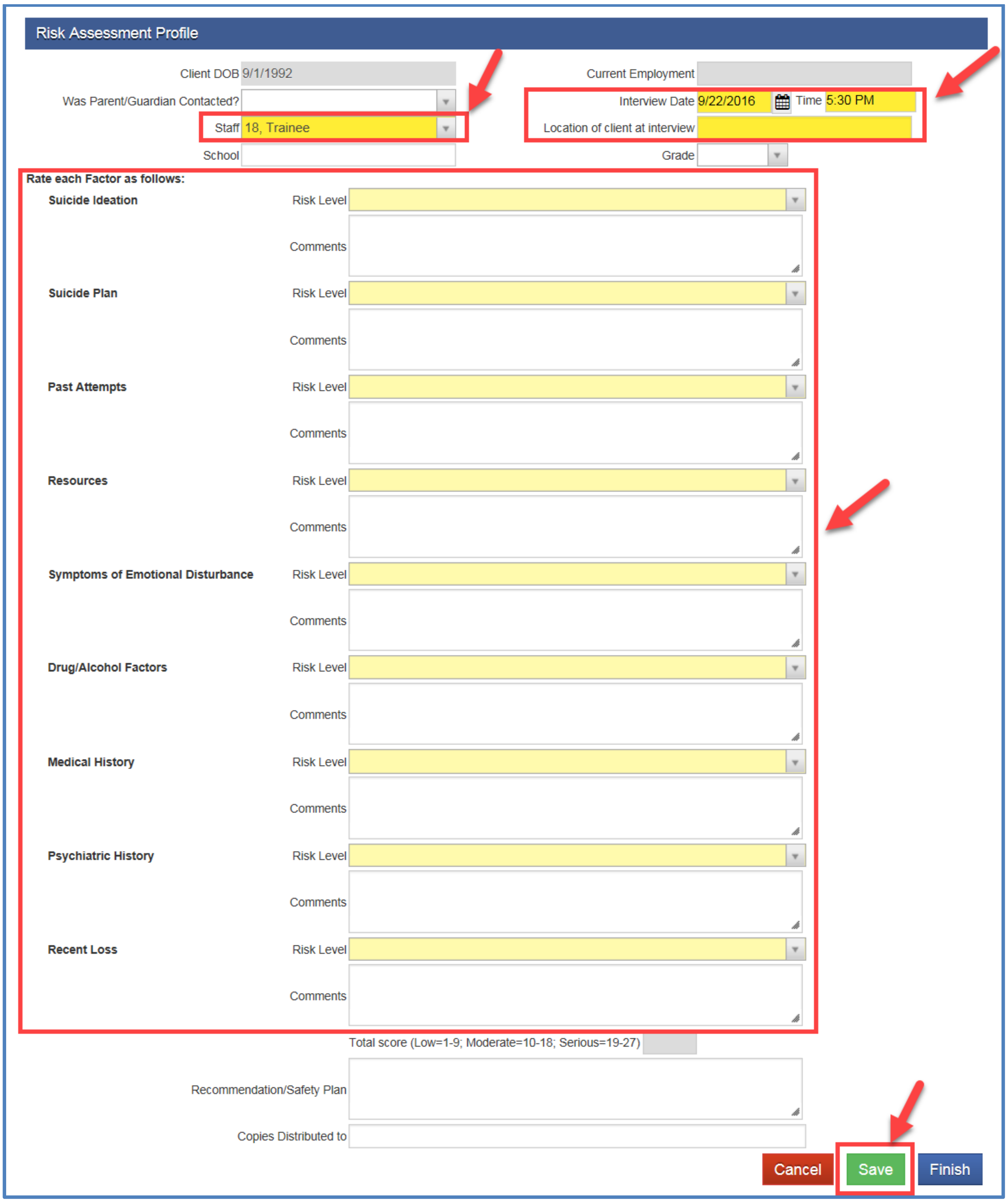
2. Click Assessments on the blue navigation pane.



3. Click Risk Assessment on the blue navigation pane.



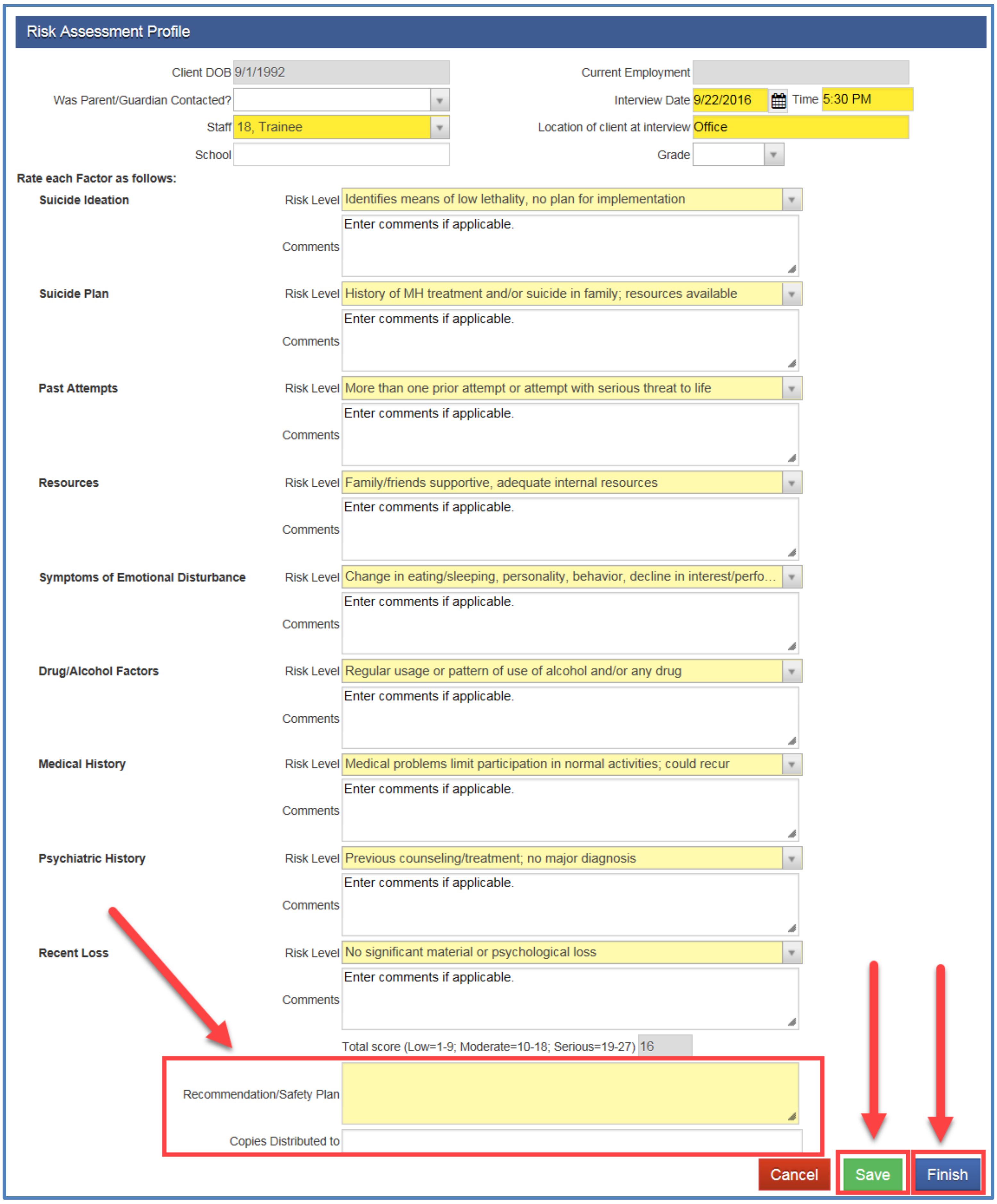
4. Click Add New.



5. Complete the following fields.
   - Interview Date – the field will populate with today's date. Update as needed.
   - Time– the field will populate the time the record was created. Update as needed.
   - Staff – the field will populate the name of the person creating the risk assessment. Update as needed.
   - Location of client at Interview – enter the interview location.
   - Suicide Ideation – select risk level.
     - Comments – enter comments if applicable.
   - Suicide Plan – select risk level.
     - Comments – enter comments if applicable.
   - Past Attempts – select risk level.
     - Comments – enter comments if applicable.
   - Resources – select risk level.
     - Comments – enter comments if applicable.
   - Symptoms of Emotional Disturbance – select risk level.
     - Comments – enter comments if applicable.
   - Drug/Alcohol Factors – select risk level.
     - Comments – enter comments if applicable.
   - Medical History – select risk level.
     - Comments – enter comments if applicable.

- Psychiatric History – select risk level.
  - Comments – enter comments if applicable.
- Recent Loss – select risk level.
  - Comments – enter comments if applicable.

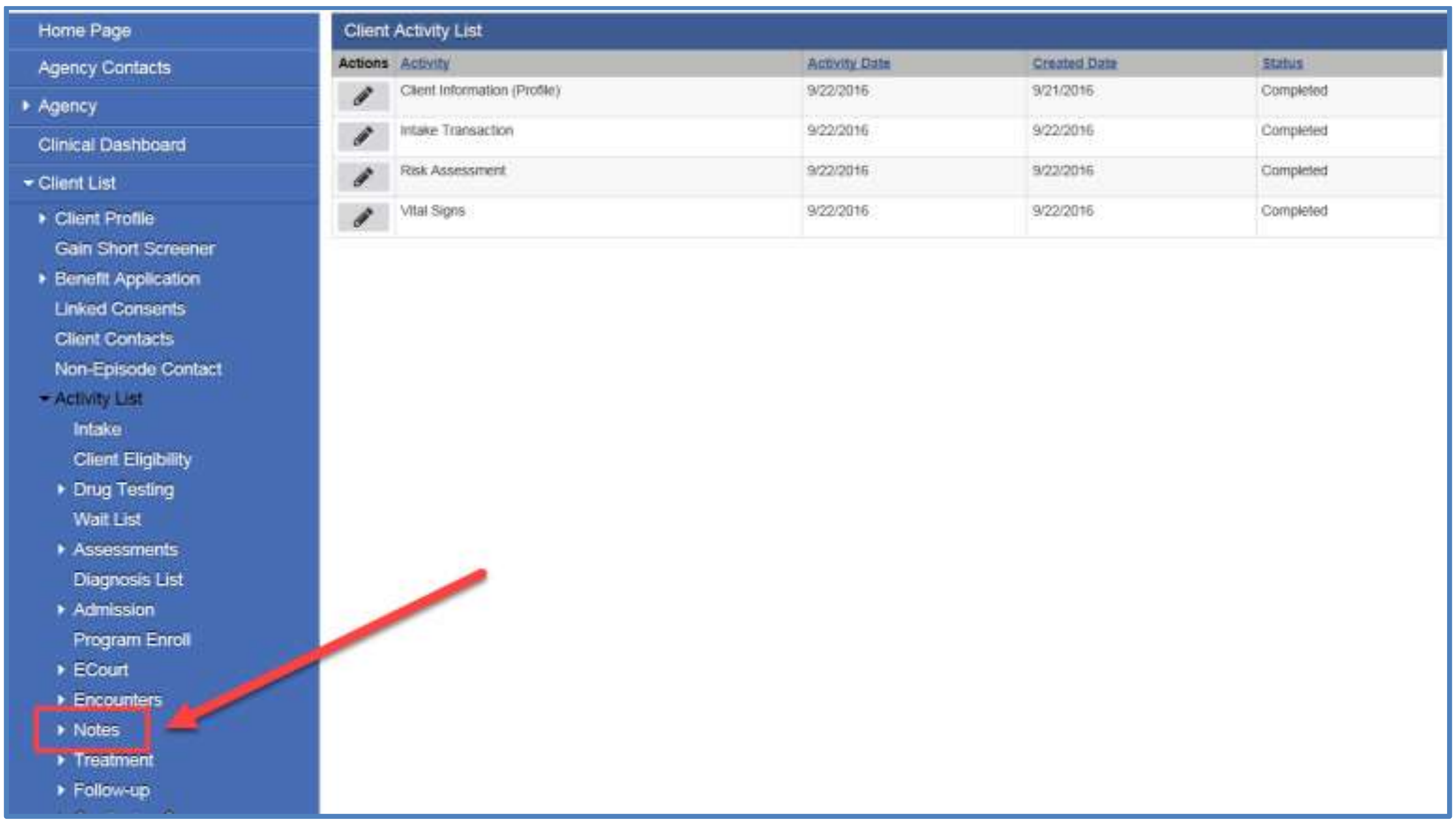
6. Click Save to generate a score.


Risk Assessment Profile
Client DOB 9/1/1992
Current Employment
Was Parent/Guardian Contacted?
Interview Date 9/22/2016 Time 5:30 PM
Staff 18, Trainee
Location of client at interview Office
School
Grade
Rate each Factor as follows:
Suicide Ideation
Risk Level Identifies means of low lethality, no plan for implementation
Comments Enter comments if applicable.
Suicide Plan
Risk Level History of MH treatment and/or suicide in family; resources available
Comments Enter comments if applicable.
Past Attempts
Risk Level More than one prior attempt or attempt with serious threat to life
Comments Enter comments if applicable.
Resources
Risk Level Family/friends supportive, adequate internal resources
Comments Enter comments if applicable.
Symptoms of Emotional Disturbance
Risk Level Change in eating/sleeping, personality, behavior, decline in interest/perfo…
Comments Enter comments if applicable.
Drug/Alcohol Factors
Risk Level Regular usage or pattern of use of alcohol and/or any drug
Comments Enter comments if applicable.
Medical History
Risk Level Medical problems limit participation in normal activities; could recur
Comments Enter comments if applicable.
Psychiatric History
Risk Level Previous counseling/treatment; no major diagnosis
Comments Enter comments if applicable.
Recent Loss
Risk Level No significant material or psychological loss
Comments Enter comments if applicable.
Total score (Low=1-9; Moderate=10-18; Serious=19-27) 16
Recommendation/Safety Plan
Copies Distributed to
Cancel Save Finish

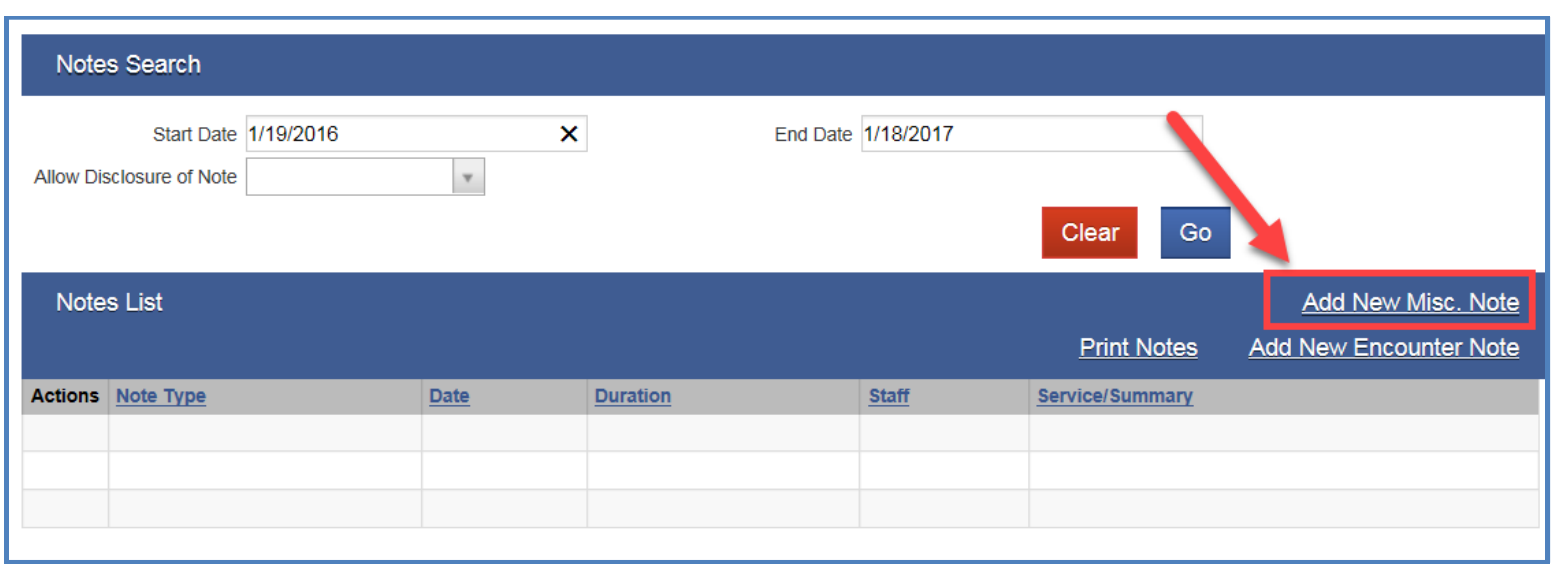
7. Complete the following fields.
   - Recommendation/Safety Plan – enter recommendations and or safety plan.
   - Copies Distributed to – enter the names of agencies or persons if applicable.
8. Click Save and Finish.
9. Create Miscellaneous Notes to document services delivered to the client.

Creating a Miscellaneous Note

1. Begin on the Client Activity List.

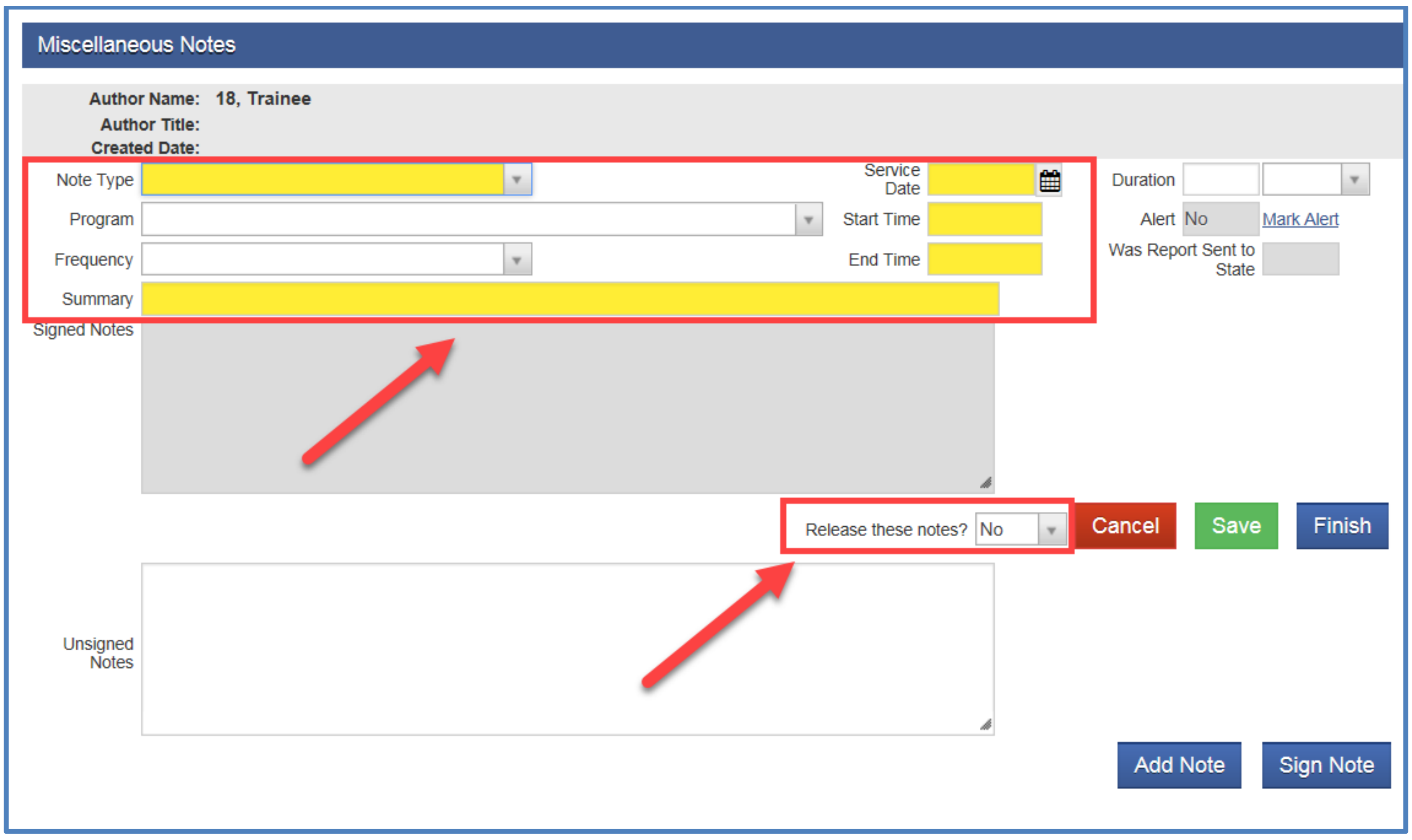


2. Once you're on the Activity List, click ▸ Notes on the blue navigation pane.



3. Click Add New Misc. Note.

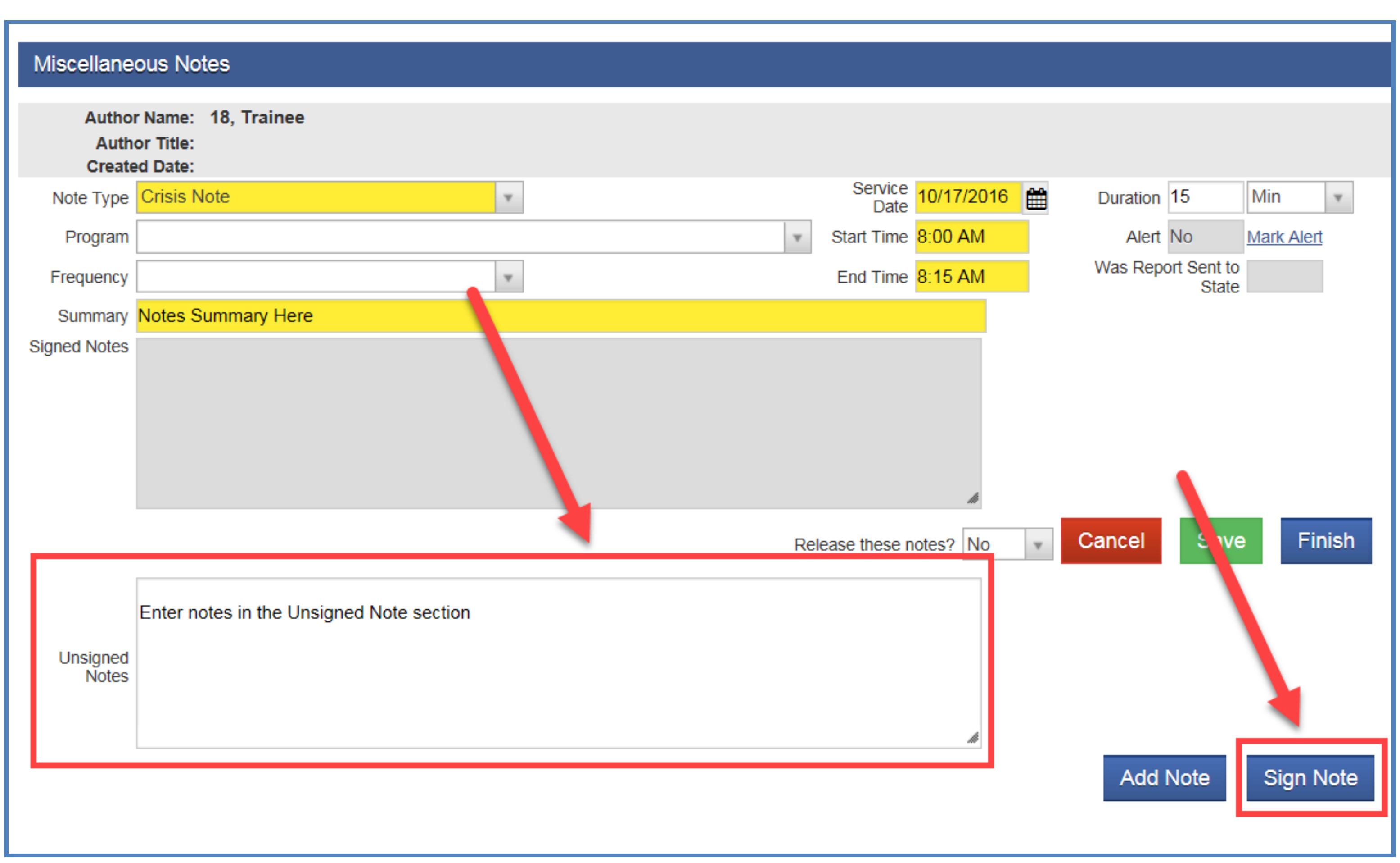
When Release these Notes is set to No, the note will not be available to view by another agency if the record is consented. For example, if the client has Consent with another agency, and No is selected, the other agency will not be able to view the note.



4. Complete the following fields.
   - Note Type – select the note type.
   - Service Date – enter the date.
   - Start Time – enter the start time as HH:MM.
   - End Time – enter the end time as HH:MM.
   - Summary – enter a Summary.
   - Release these notes? – the field will populate with No. Update as needed.

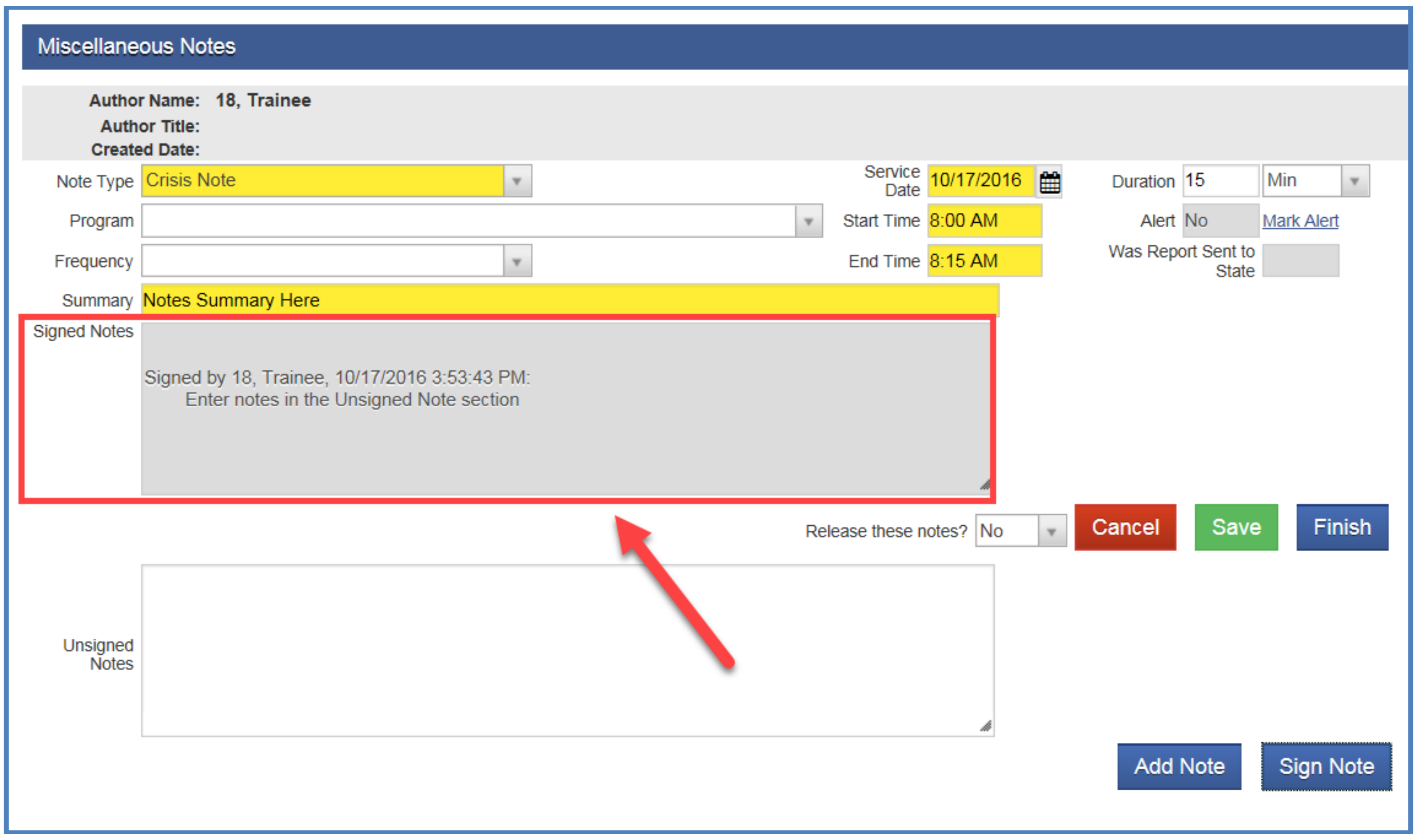
TIPS: Spell check your Unsigned Notes before clicking Sign Note. A signed note becomes read-only and cannot be edited. To make a change, type an amendment in the unsigned notes box and click Sign Note.

TIPS: Click **Add Note** to display additional note space in addition to the expandable Unsigned Note section.

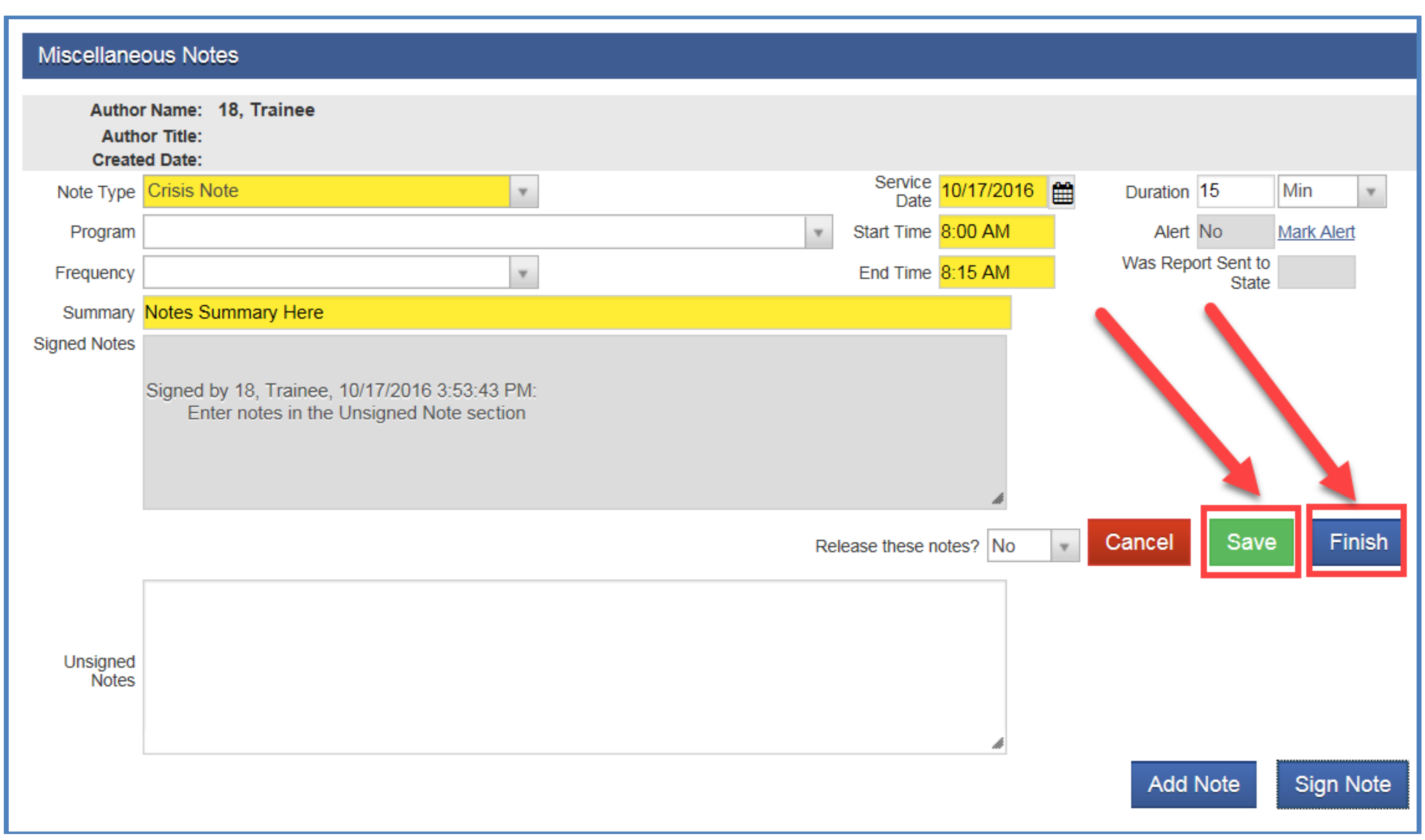


5. Enter notes in the Unsigned Note section.

6. When the notes are complete, click Sign Note.



7. The Signed Note becomes read-only and an electronic signature and time stamp is created in the Signed Notes section.

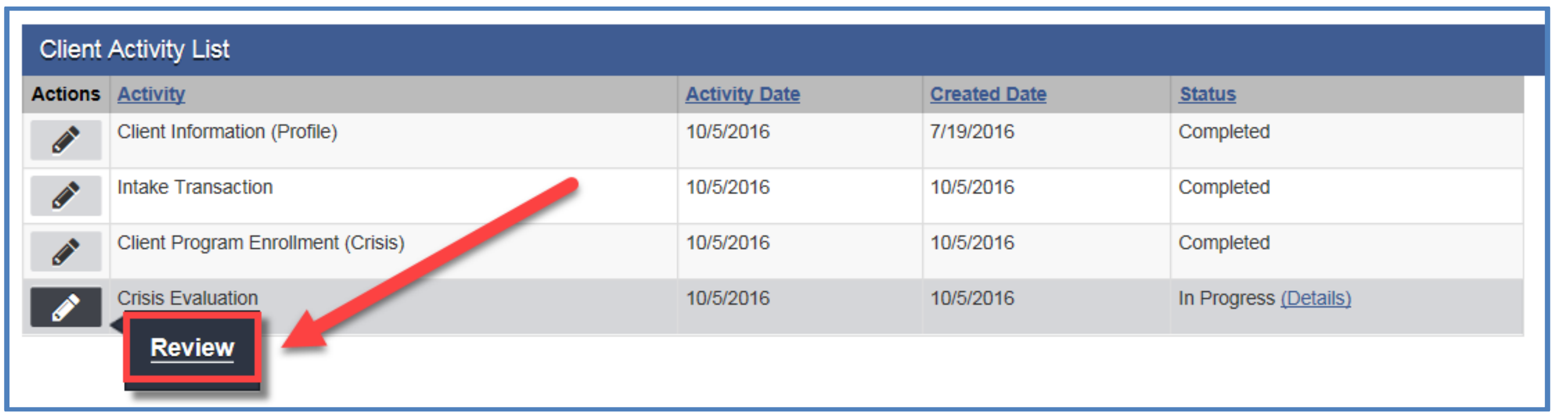


8. Click Save and click Finish.

9. Complete the Crisis Evaluation when the client is ready to leave the Crisis Center.

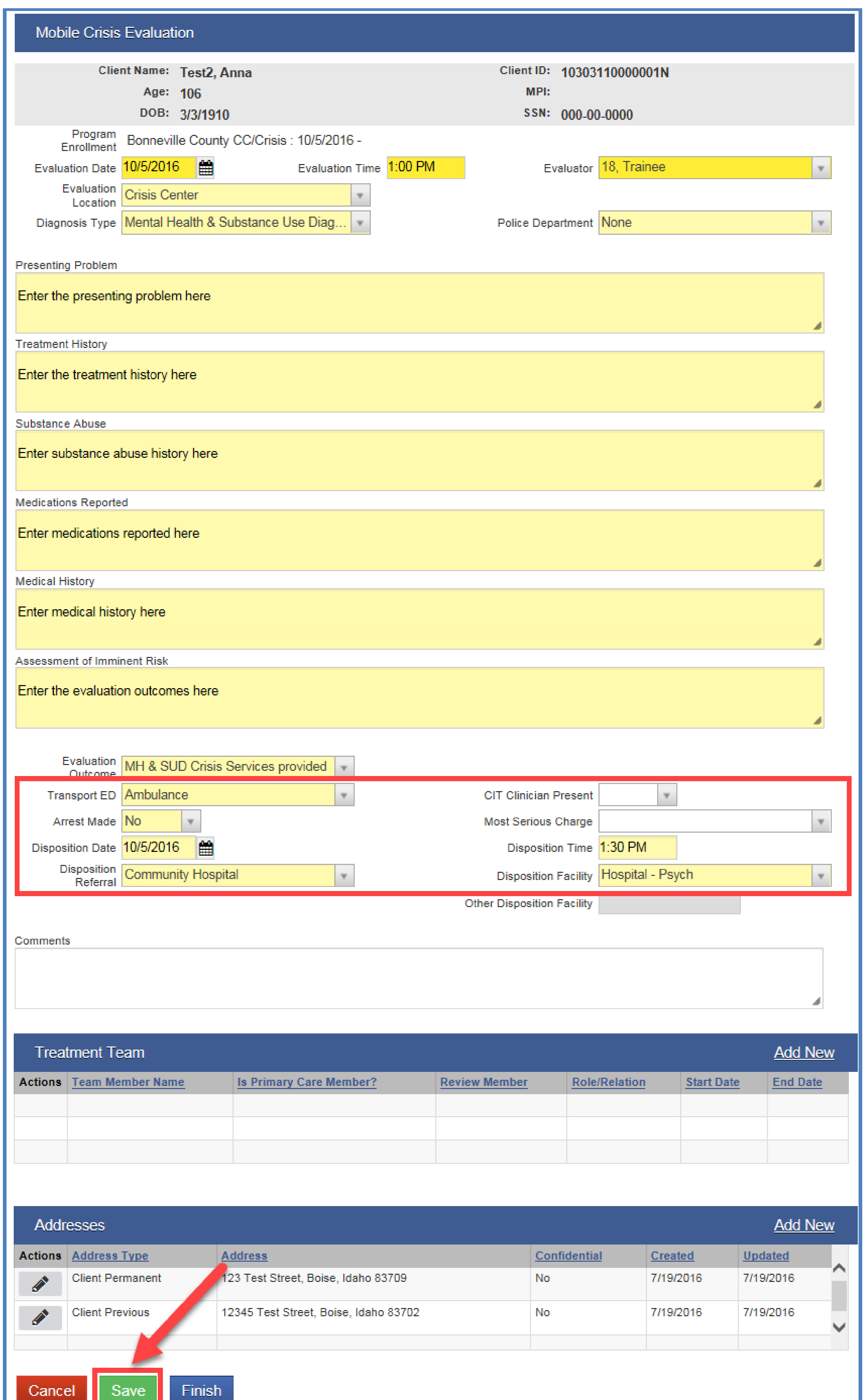
Completing the Crisis Evaluation when the client is leaving the BHCCC

1. Begin on the Client Activity List.

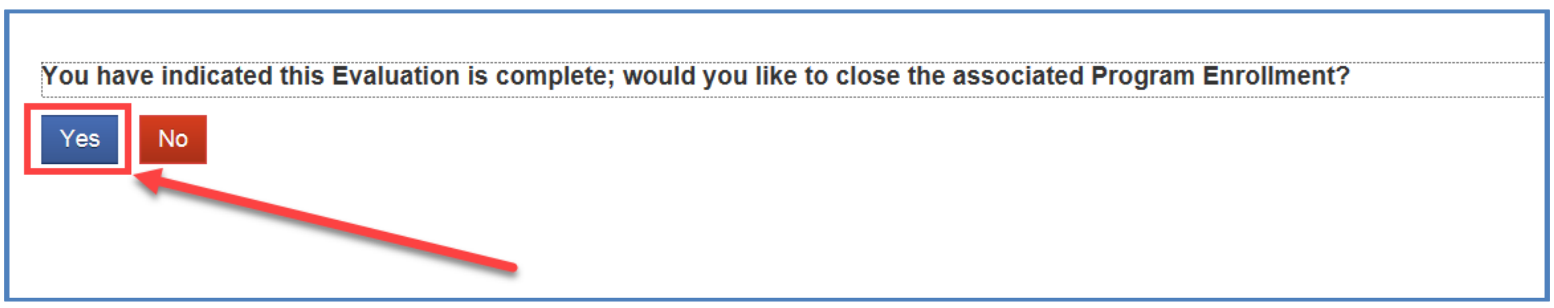


2. Once you're on the Client Activity List, hover over the  and click 

under Actions for the Crisis Evaluation.



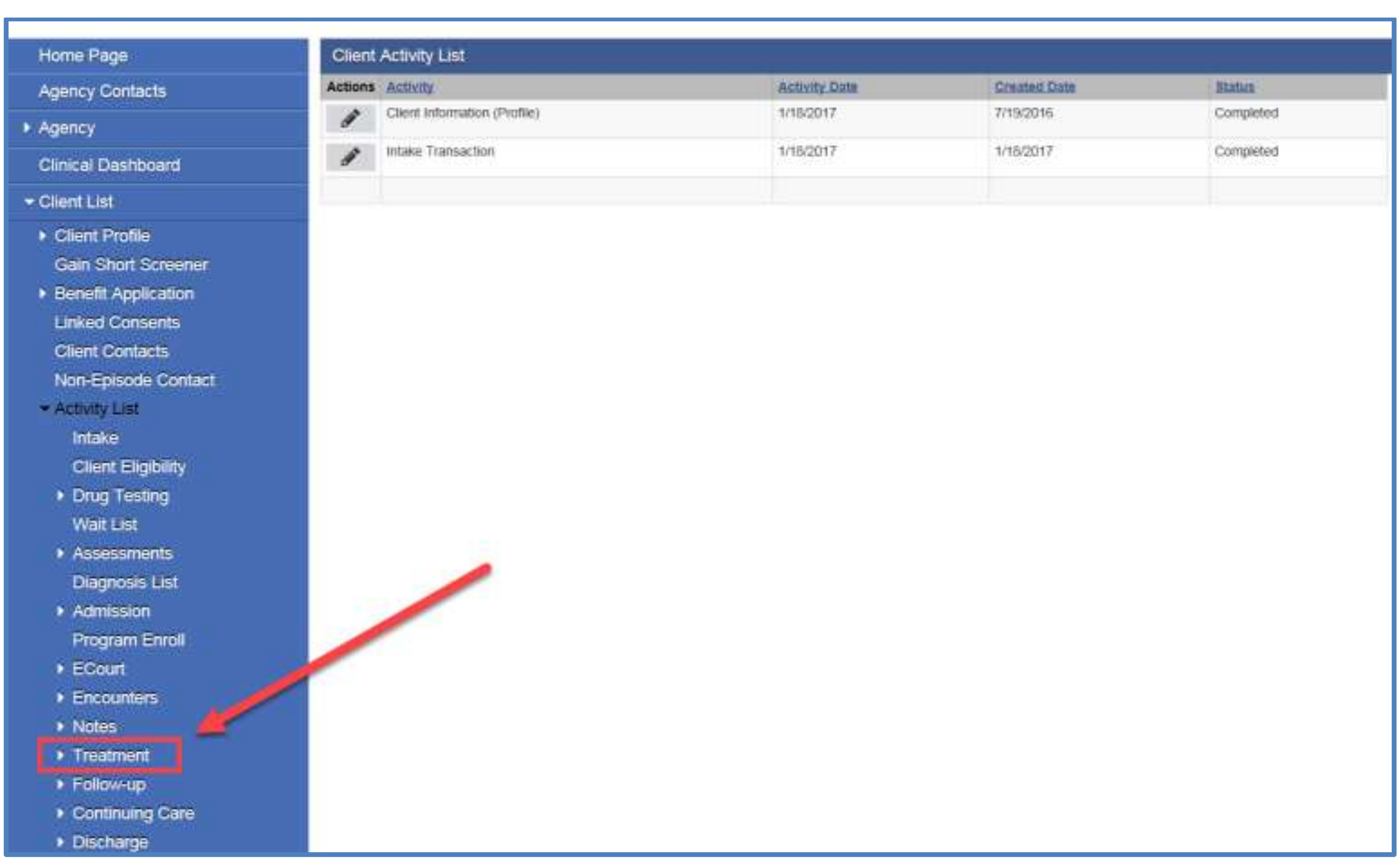
3. Complete the following fields.
    - Transport ED – select the method of transportation of the client when the client is leaving the BHCCC.
    - Arrest Made – select Yes or No (was the client arrested when leaving the BHCCC).
    - Most Serious Charge – select the type of charge if an arrest was made when the client is leaving the BHCCC.
    - Disposition Date – enter date the client is leaving the BHCCC.
    - Disposition Time – enter the time the client is leaving the BHCCC.as HH:MM.
    - Disposition Referral – select the Referral type.
    - Disposition Facility – select the location where the client is going when leaving the BHCCC.
4. Click Save.



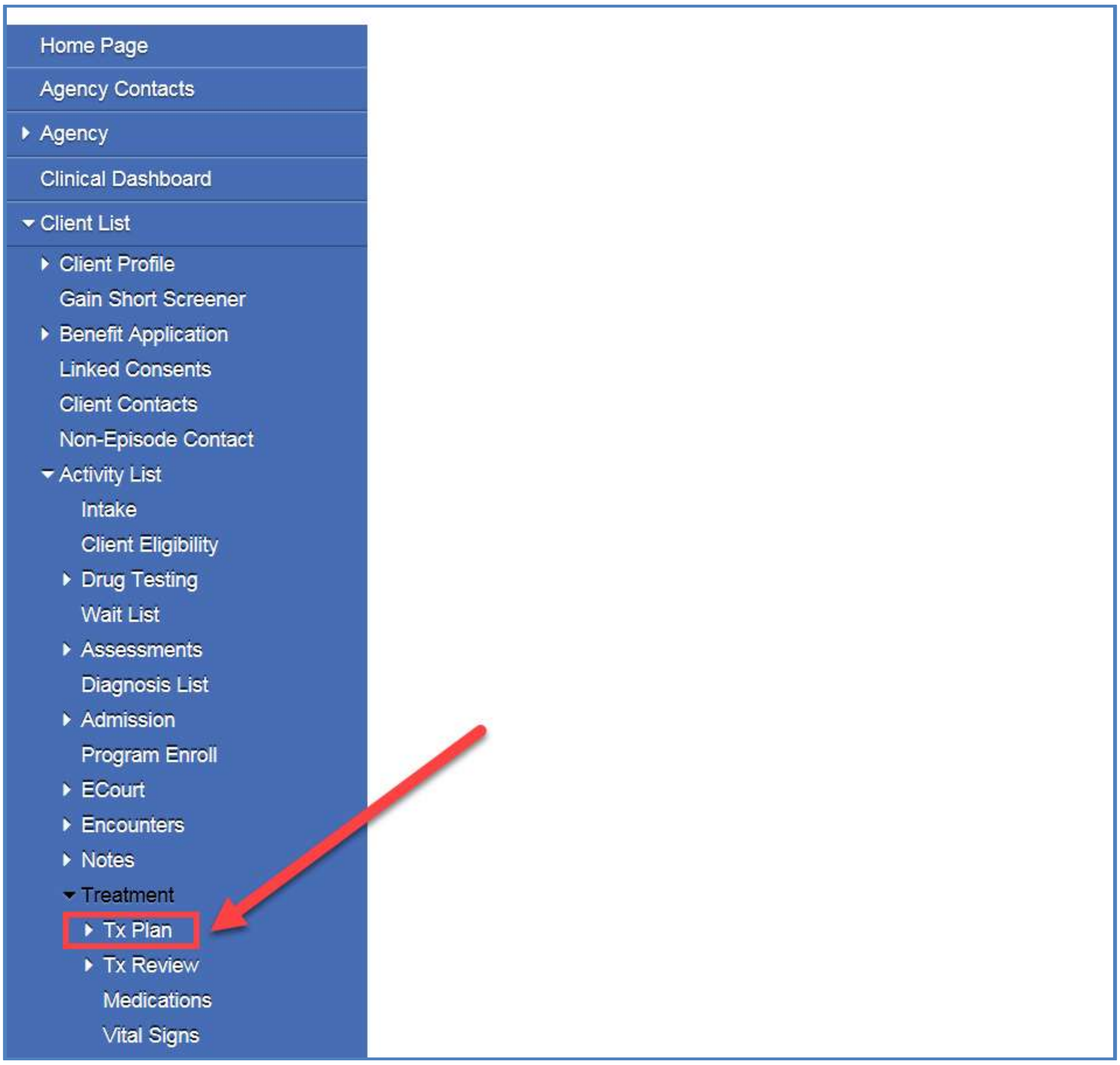
5. Click Yes to close the Crisis Program Enrollment or click No to cancel.
6. Create a Treatment Plan. This section is required but it can be completed at any time, as long as the episode is open.

Creating a Treatment Plan

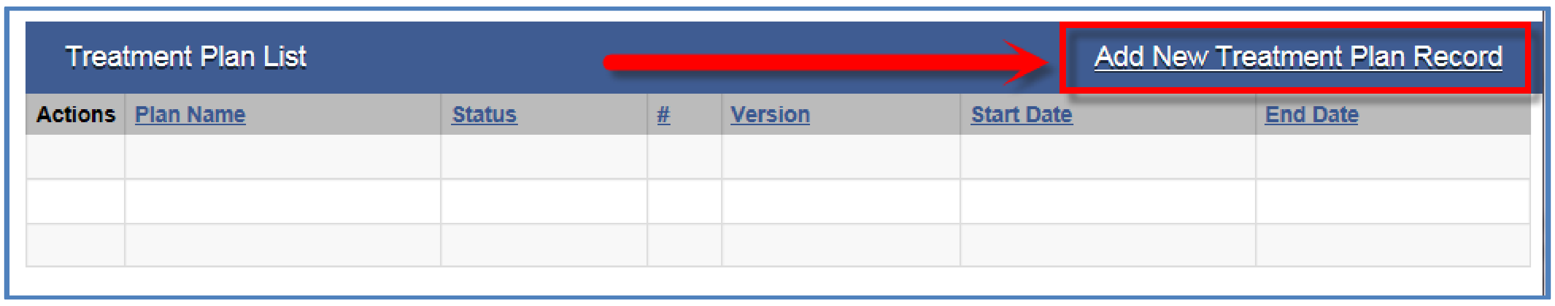
1. Begin on the Client Activity List.



2. Click Treatment on the blue navigation pane.

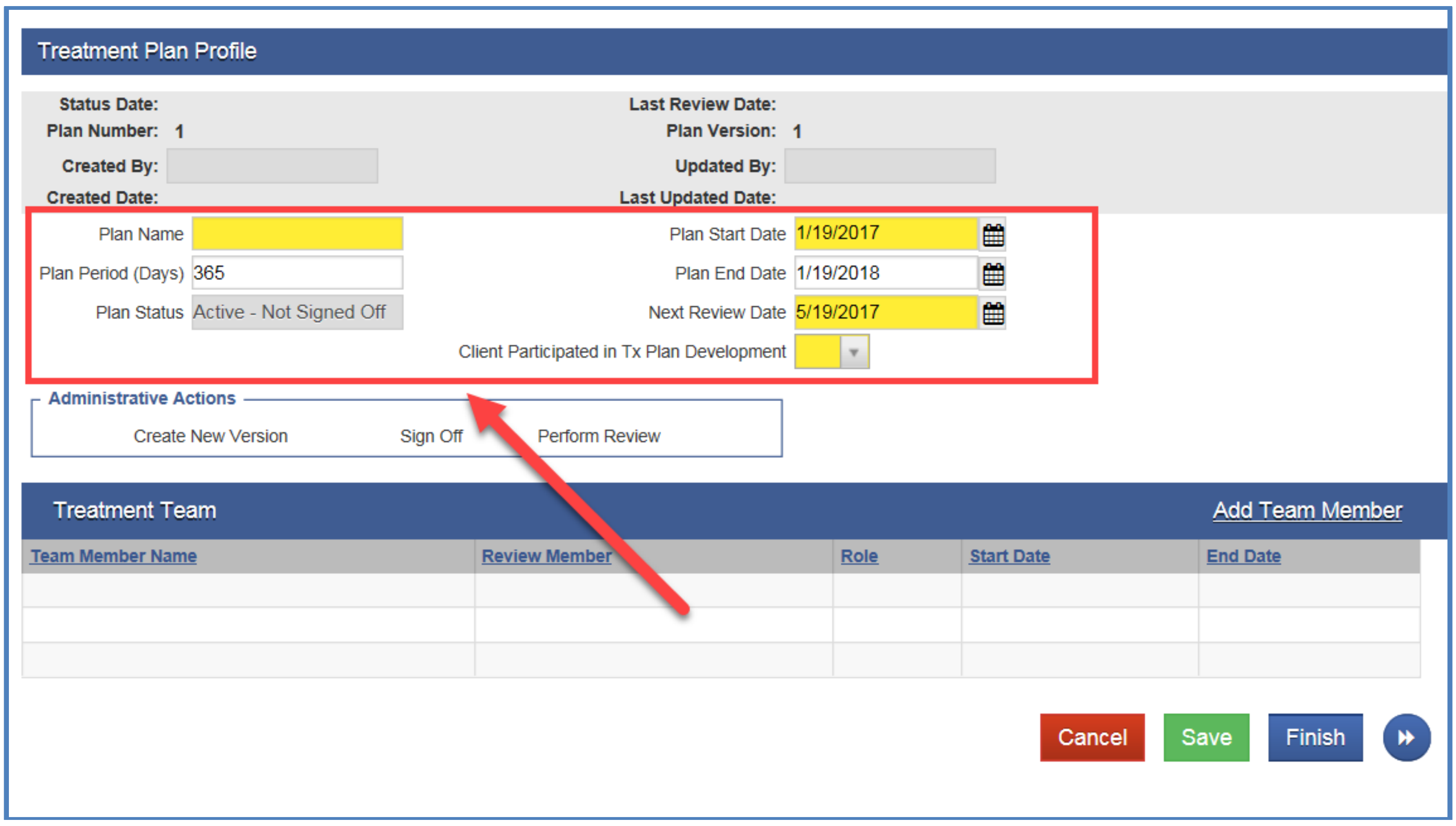


3. Click Tx Plan on the blue navigation pane.



4. Click Add New Treatment Plan Record on the Treatment Plan List screen.

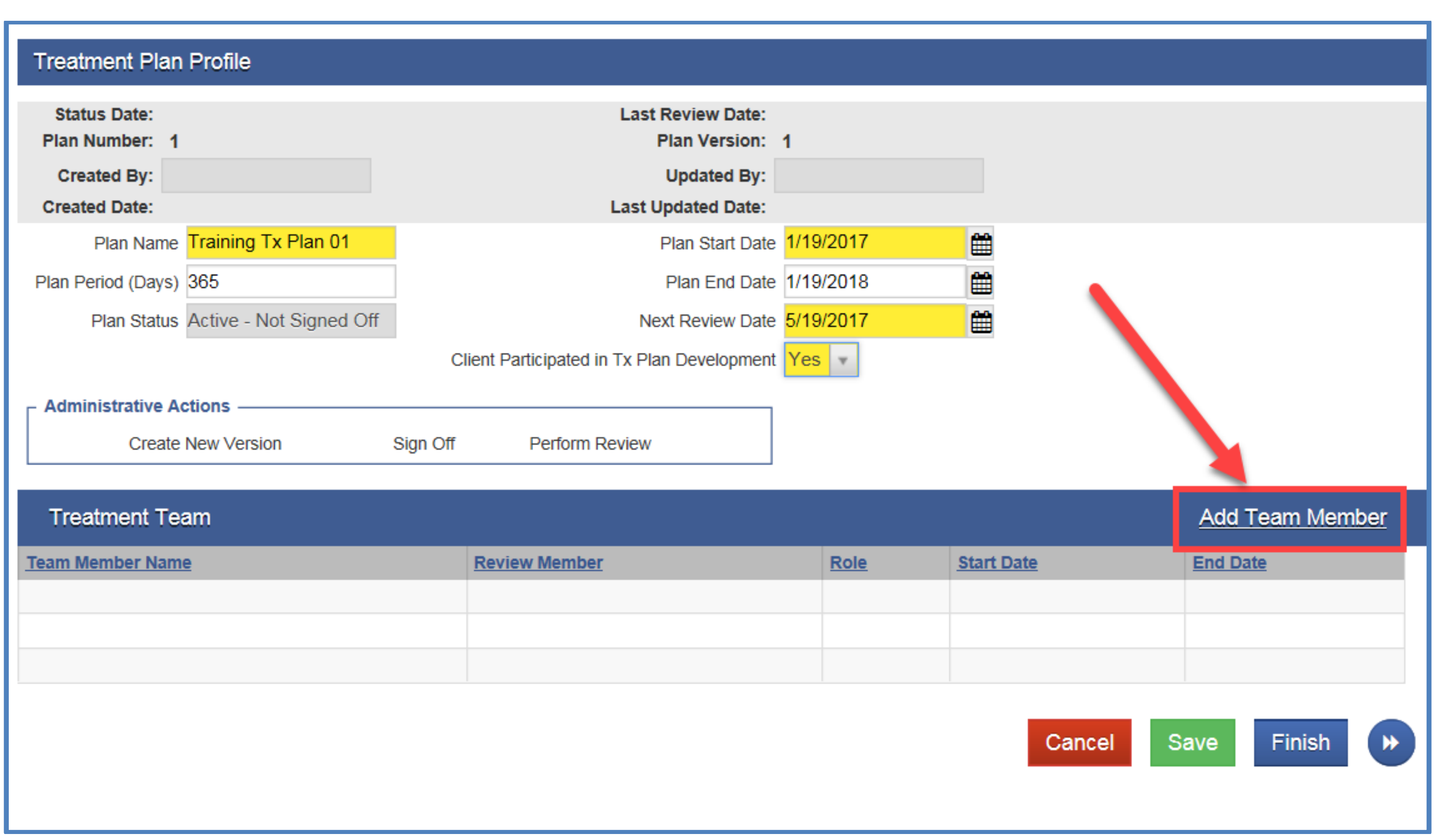
TIPS Click Tab after entering the Plan Period (Days) to calculate the Next Review Date.



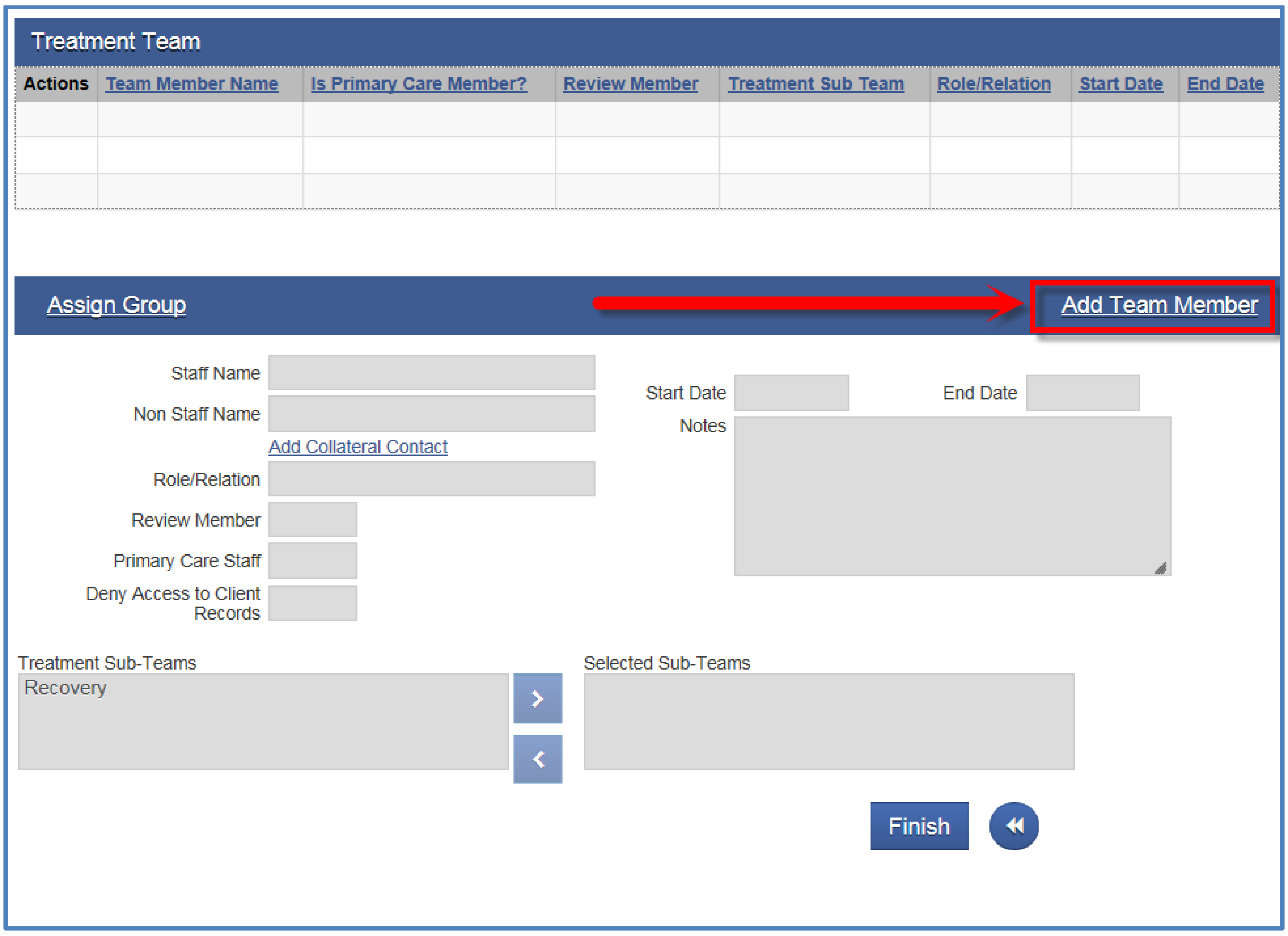
5. Complete the following fields.
   - Plan Name – enter the name of the plan.
   - Plan Start Date – the field will populate with today's date. Update as needed (date the plan expected to be active).
   - Plan Period (Days) – enter the timeframe for the treatment plan and click the Tab key. This will calculate the Next Review Date.
   - Plan End Date – enter the plan end date.
   - Next Review Date –the value is calculated based on the information entered for the Plan Period. Update as needed.
   - Client Participated in TX Plan Development – select Yes or No to document the Client's involvement. If the client does not participate in the Treatment Plan Development, document the reason in the Treatment Plan Overview, Clinical Comments/Recommendations section.

TIPS **Signature lines for treatment team members will not print on the Treatment Plan paper version unless team members are added electronically in WITS.**

TIPS Team Members cannot be "deleted" from the list of Team Members. If the individual is no longer an active member of the Treatment Team, the date they ended their involvement will appear in the "End Date" column. The inactive team member's name will display on drop-down menus for the client for one month after the end date.

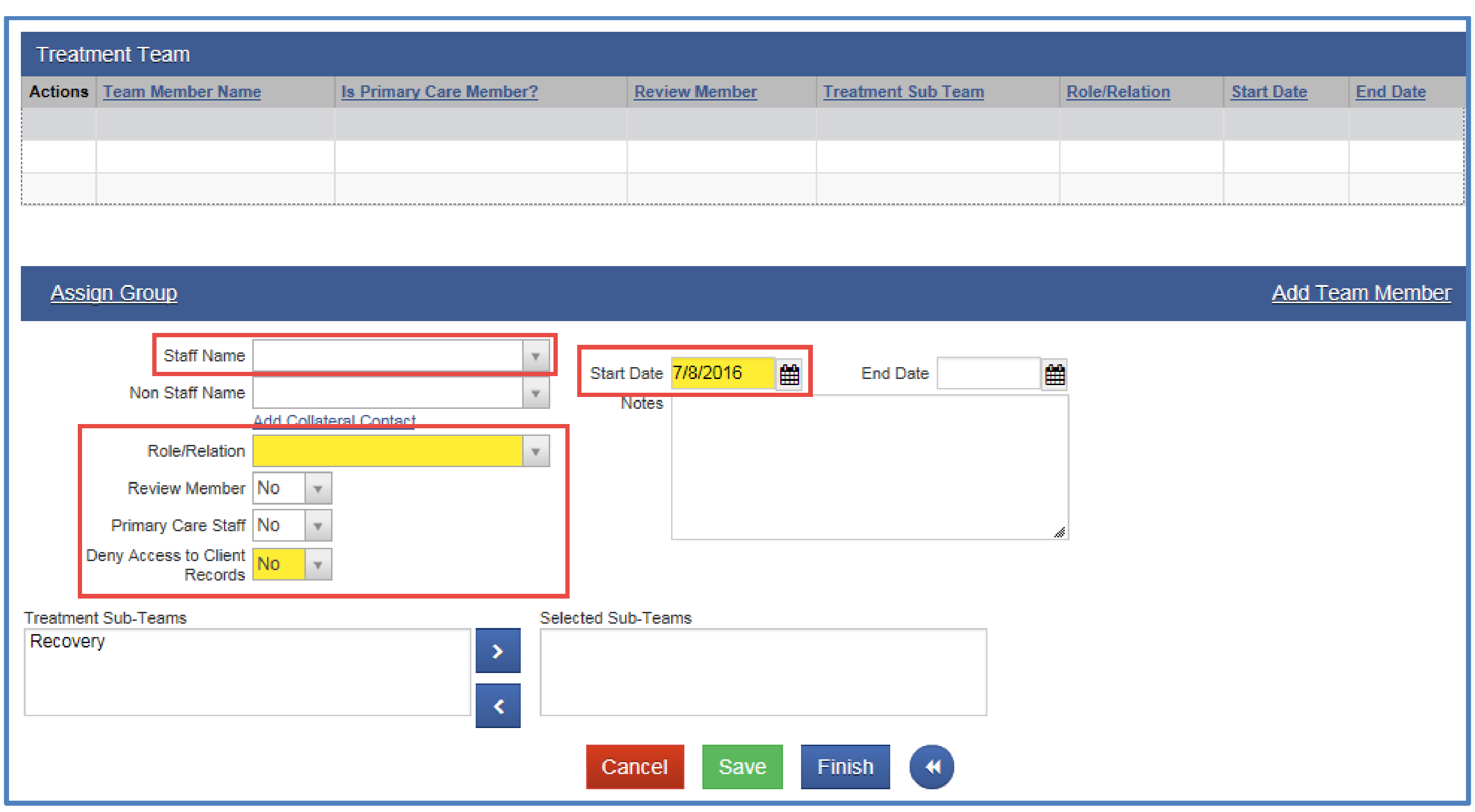


6. Click Add Team Member.

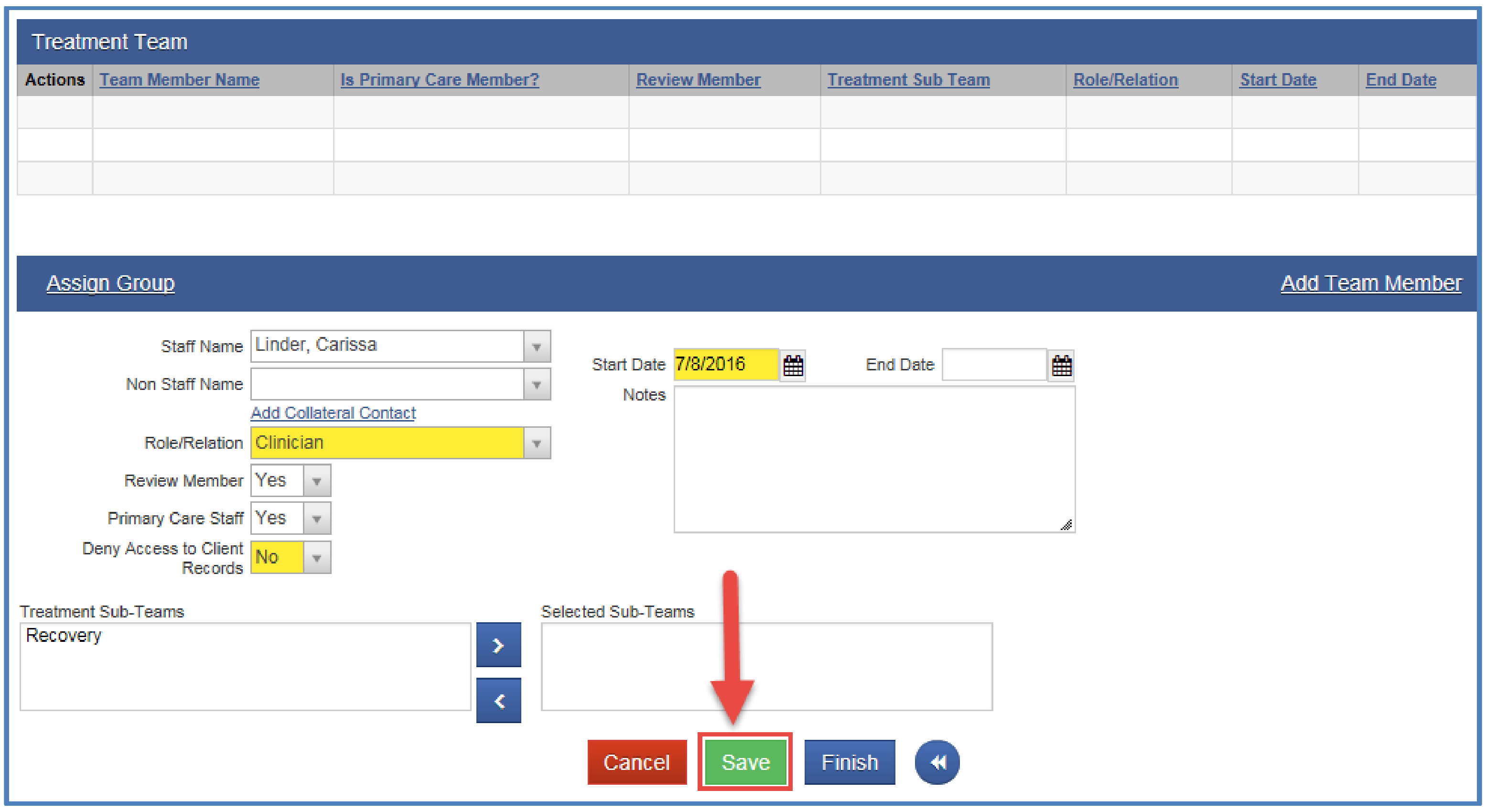


7. Click **Add Team Member**.

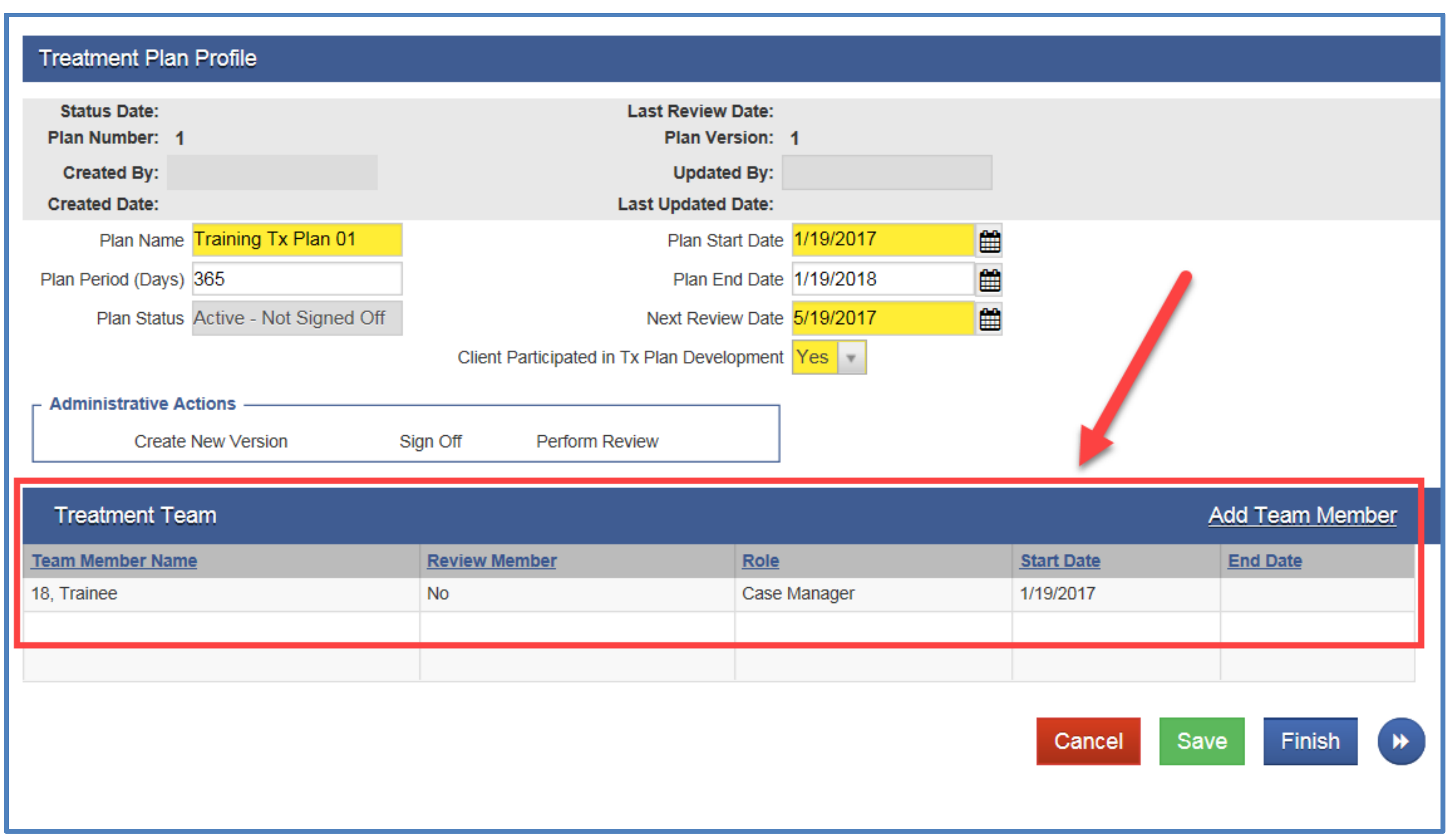
If you need to deny access to a client record for a specific member of your Agency, add them to the Treatment Team, and set 'Deny Access to Client Records' to Yes.



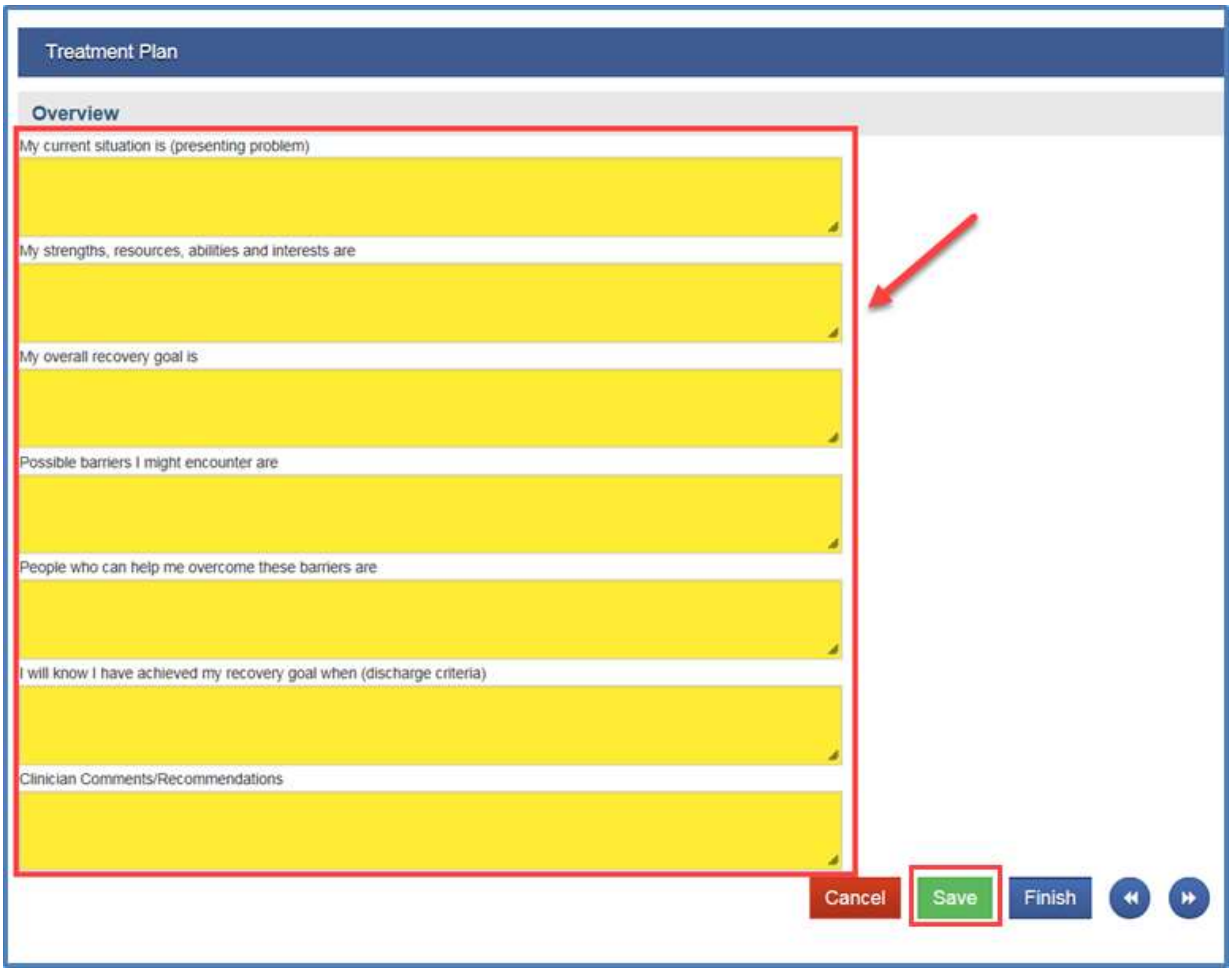
8. Complete the following fields.
   - Staff Name – select the staff member's name. Staff members without an end date in their staff profile will display in the drop-down menu.
   - Start Date – enter the Start Date.
   - Role/Relation – select the role or relation of the Treatment Team Member to the client.
   - Review member –select Yes or No.
   - Primary Care Staff –select Yes or No.
   - Deny Access to Client Records –select Yes or No. **If you select Yes the staff member *will not* be able to view the client.**



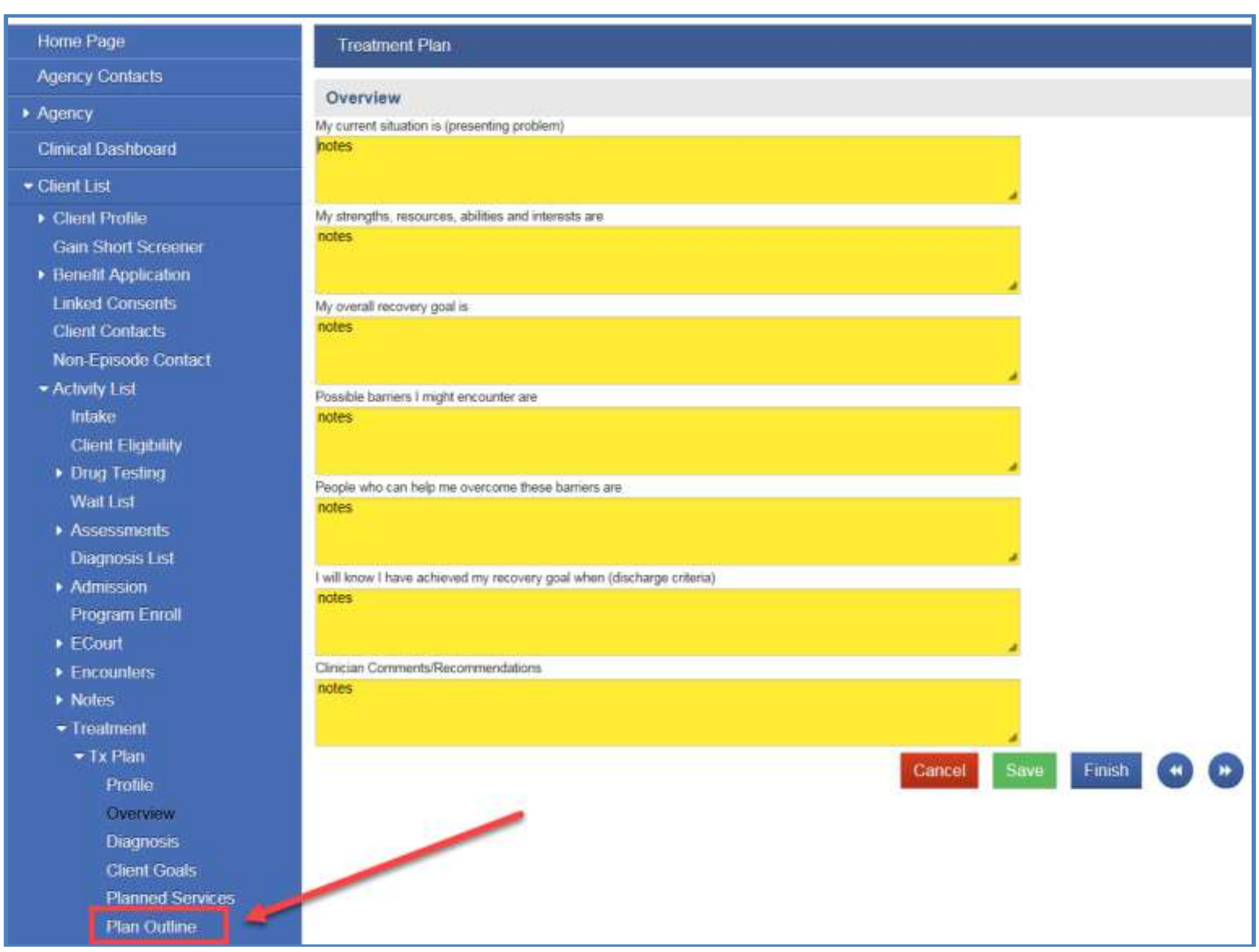
9. Once all the information is entered, click Save. Repeat these steps to add additional team members and click Finish.



10. The Treatment Team Members will populate in the Treatment Team section of the Profile. Click .

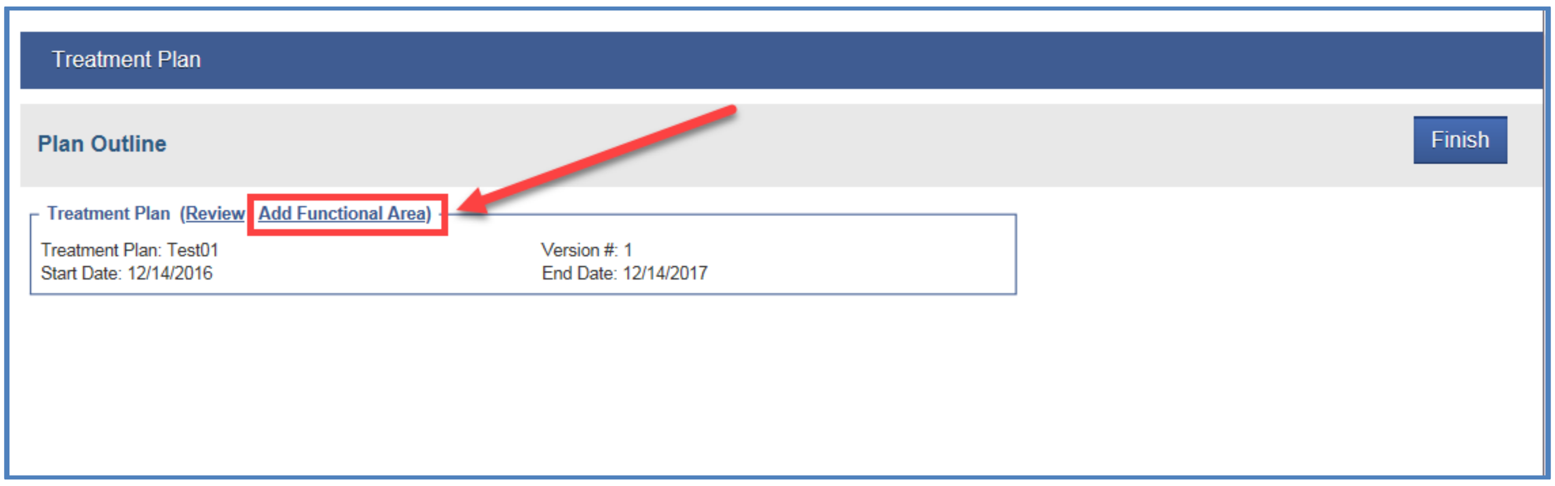


11. Follow the prompts and answer each question. Click Save.

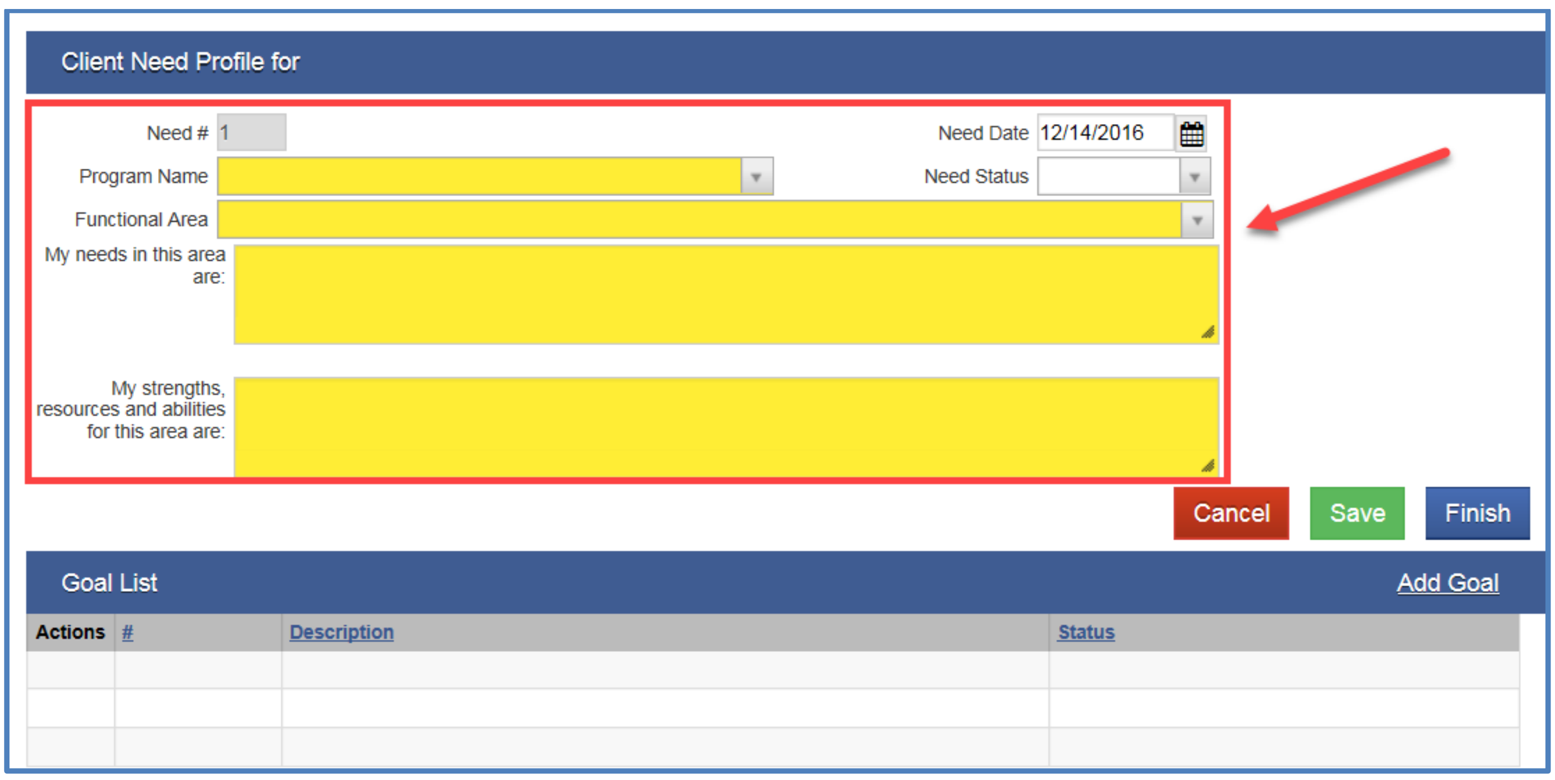


12. Click **Plan Outline** to navigate to the Treatment Plan Outline.

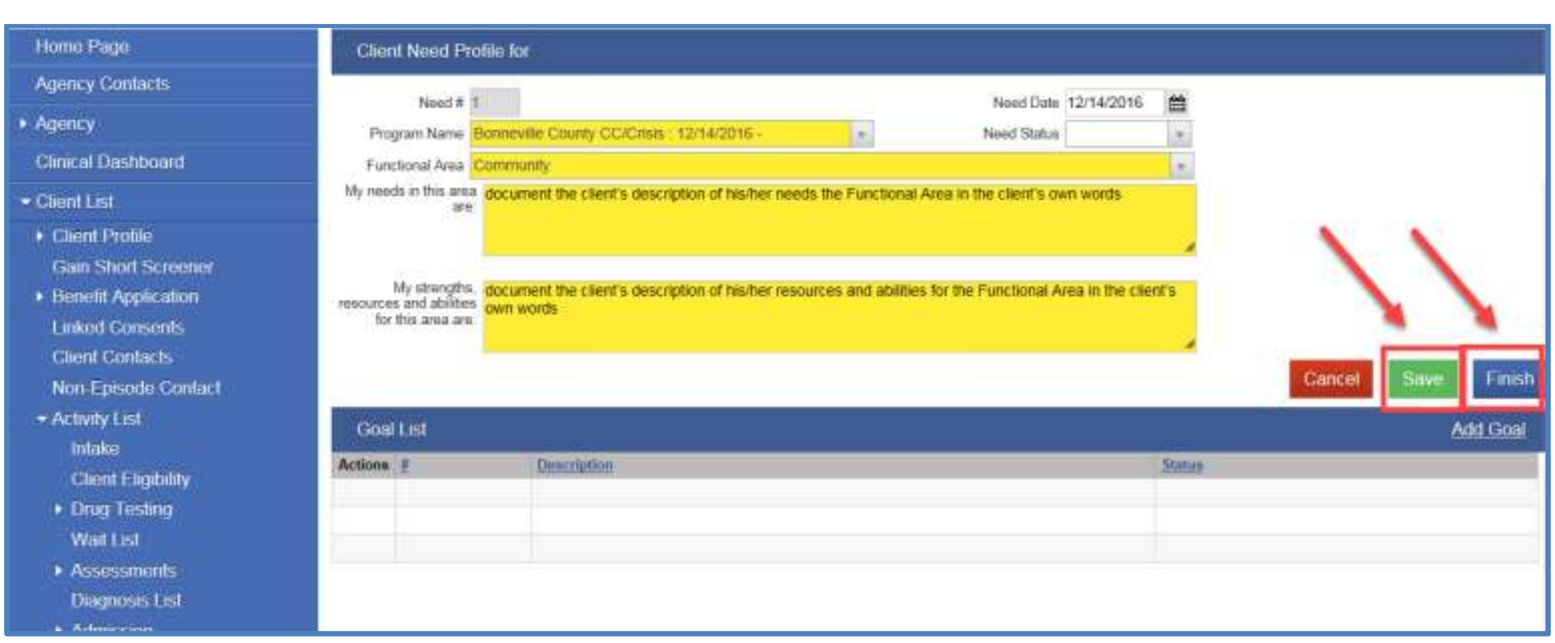
The Treatment Plan Outline gives an "at a glance" look at the entire Treatment Plan. Review or delete information previously entered, or add new information to the Treatment Plan on this screen.



13. Click **Add Functional Area** to add Needs.



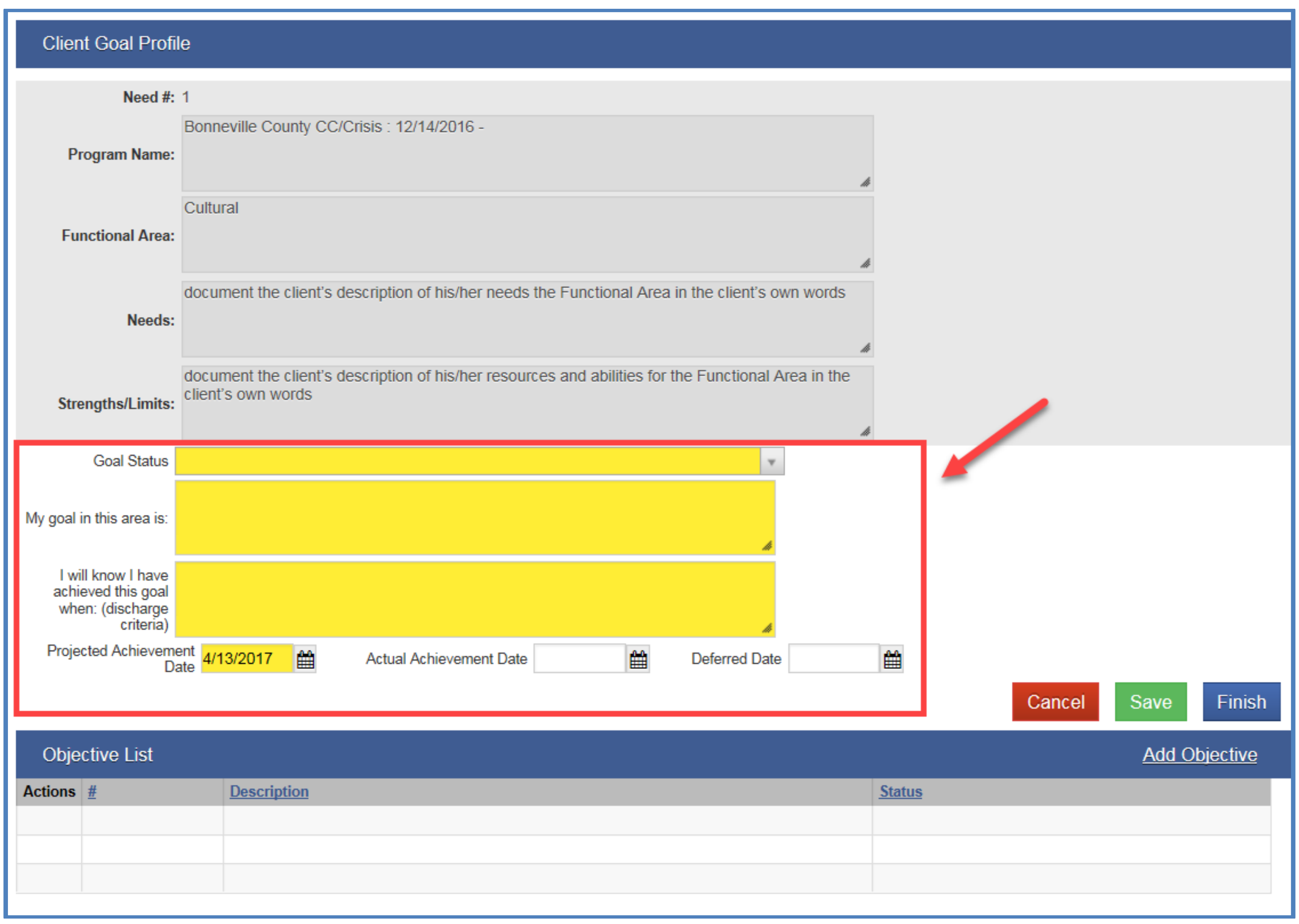
14. Complete the following fields.
    - Need Date – the field will populate with today's date. Update as needed.
    - Program Name – select the Crisis Program.
    - Functional Area – select the Functional Area.
    - My needs in this area are: – document the client's description of his/her needs the Functional Area.
    - My strengths, resources and abilities for this area are – document the client's description of his/her resources and abilities for the Functional Area.



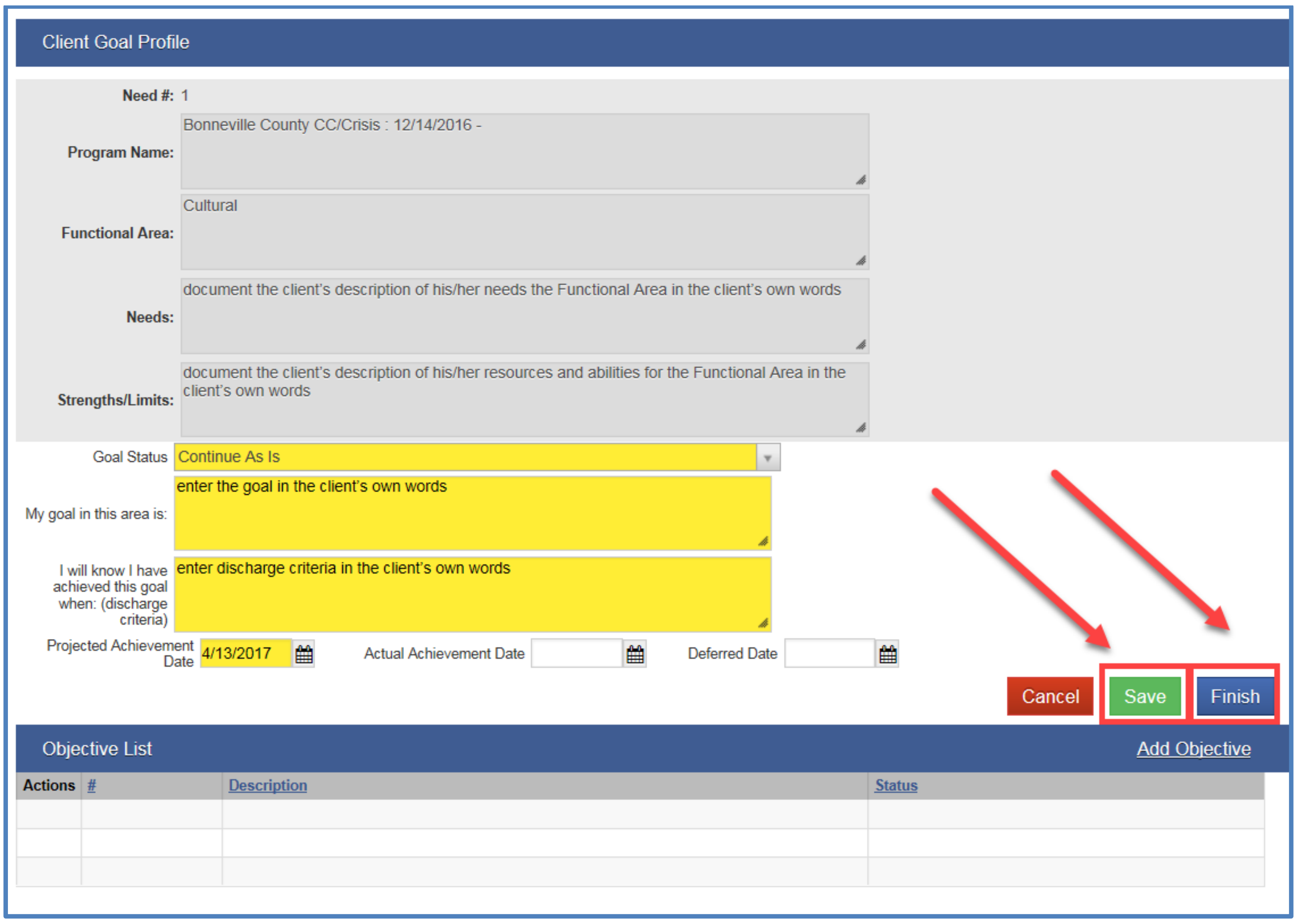
15. Click **Save** and click **Finish** to navigate back to the Treatment Plan Outline.

16. Click Add Goal to add Goals.

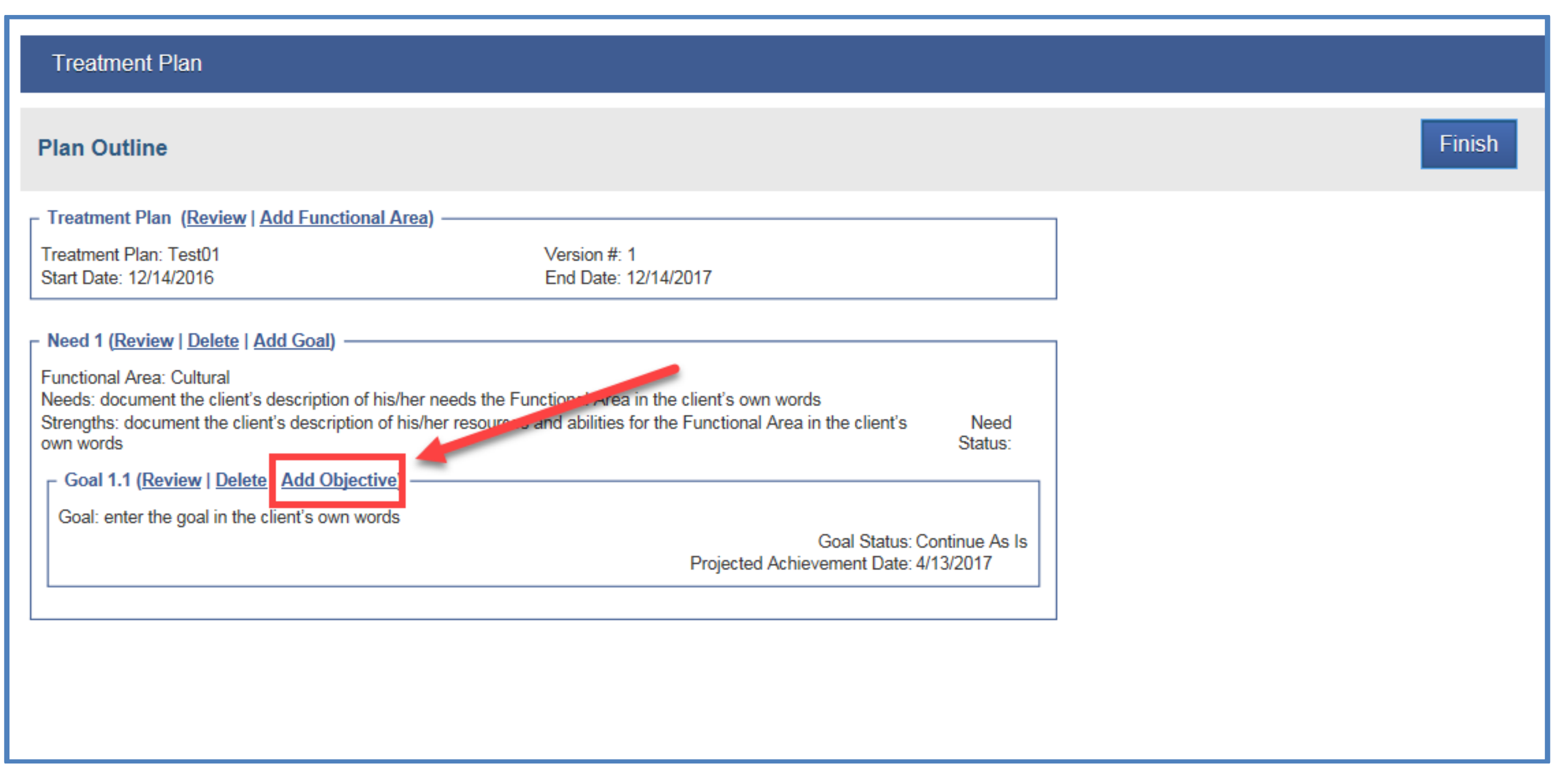
WITS populates the following fields on the Client Goal Profile screen as Read Only from the Client Need Profile: Need #, Program Name, Functional Area, Needs, Strengths/Limits.



17. Complete the following fields
    - Goal Status – select the status of the goal.
    - My goal in this area is – enter the goal.
    - I will know I have achieved this goal when– enter the client's description.
    - Projected Achievement Date – Enter the projected achievement date.

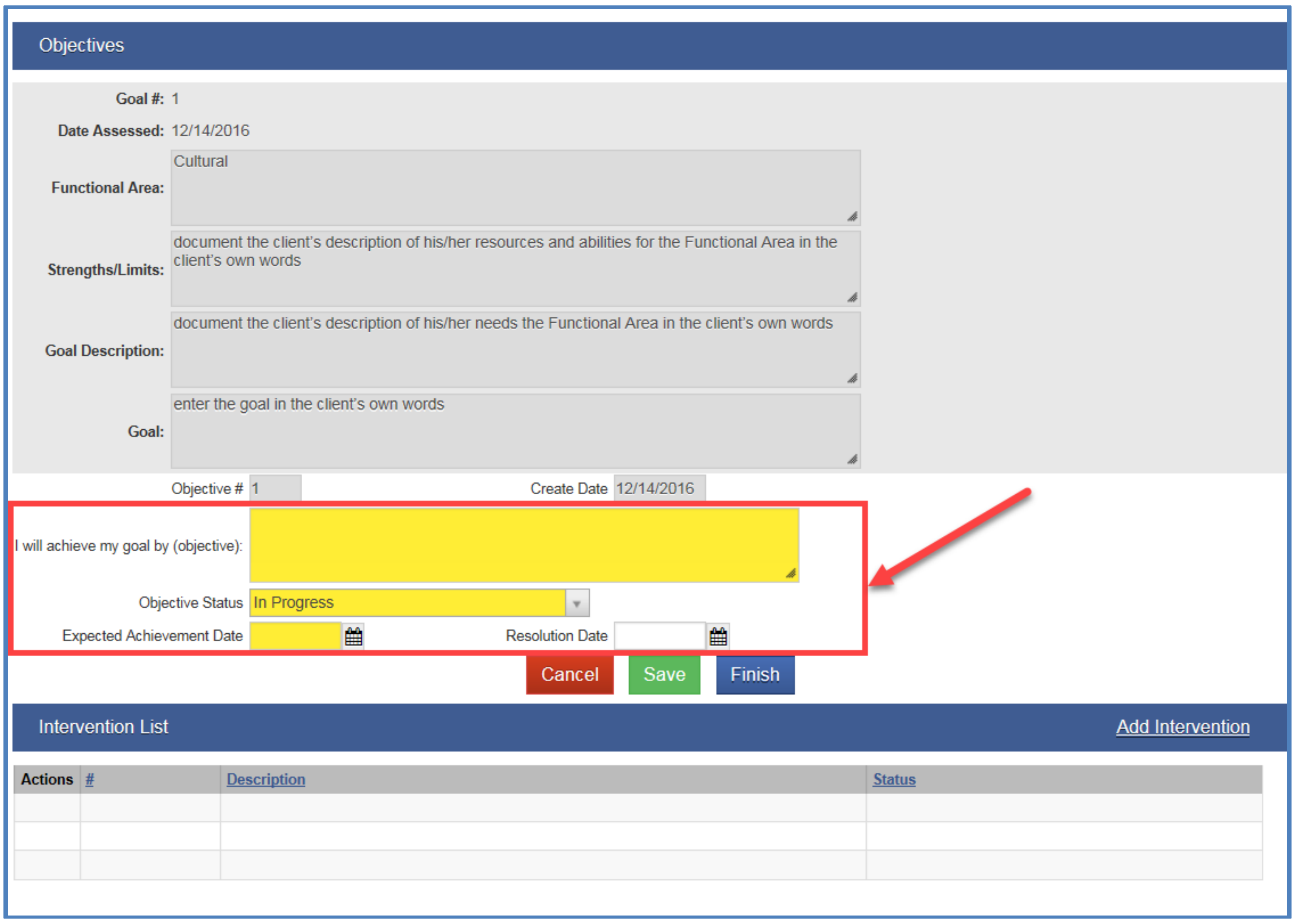


18. Click **Save** and click **Finish** to navigate back to the Treatment Plan Outline.

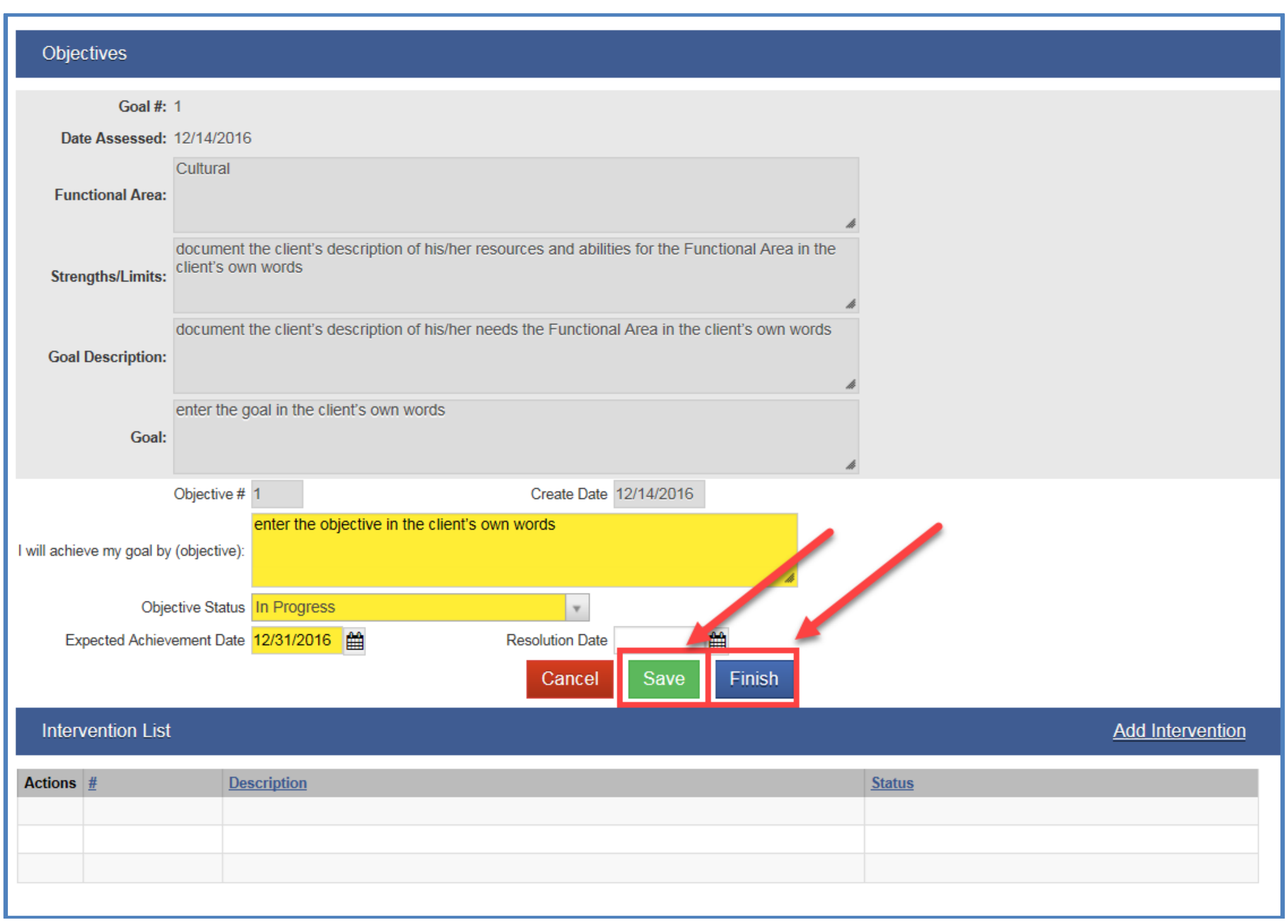


19. Click Add Objective to add objectives to this Goal.

WITS populates the following fields on the Client Objective screen as Read Only from the Client Goal Profile: Goal #, Date Assessed, Functional Area, Strengths/Limits, Goal Description, Goal.



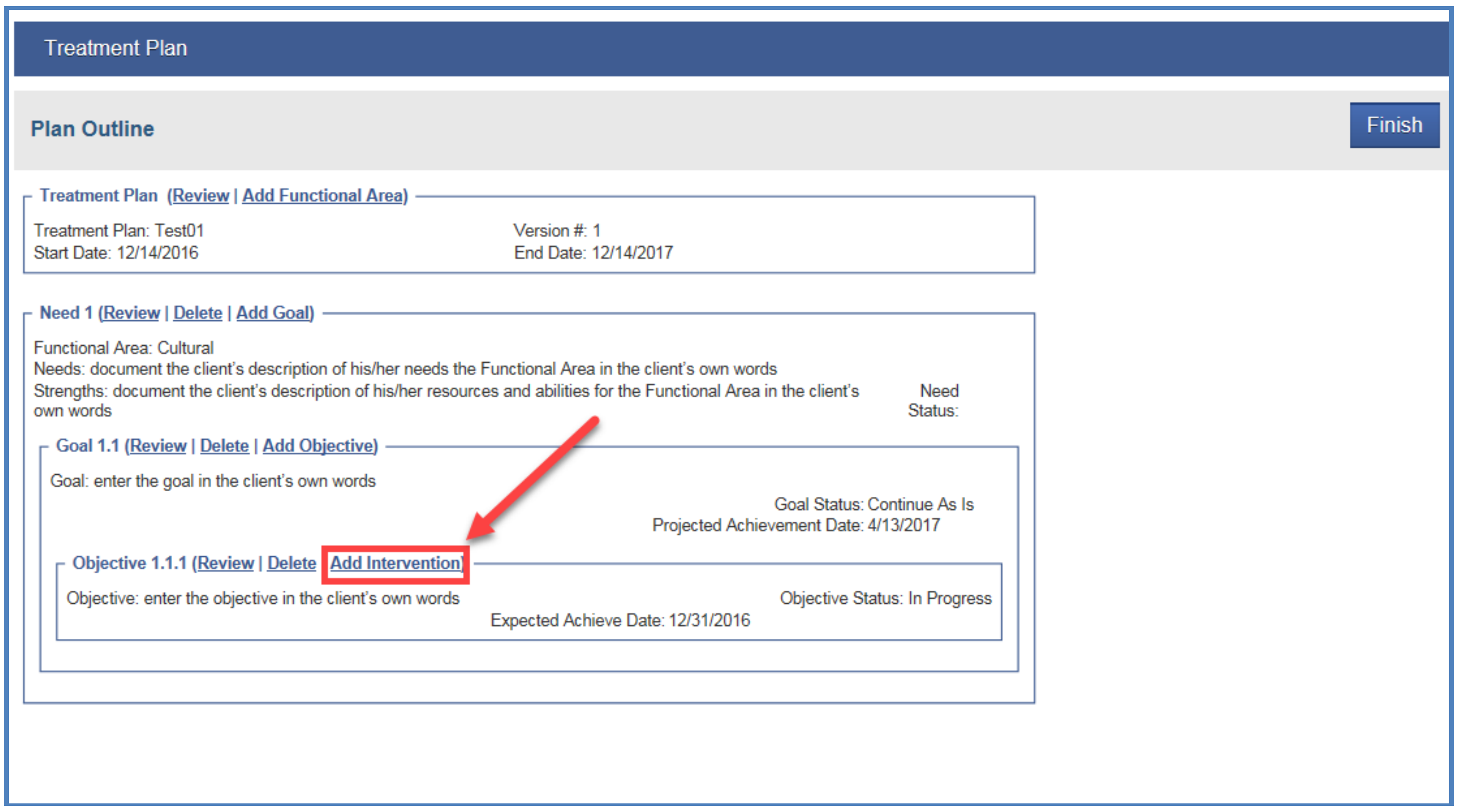
20. Complete the following fields
   - I will achieve my goal by (objective) – enter the objective.
   - Objective Status – the field will populate as In Progress.
   - Projected Achievement Date – enter the projected achievement date.



21. Click 

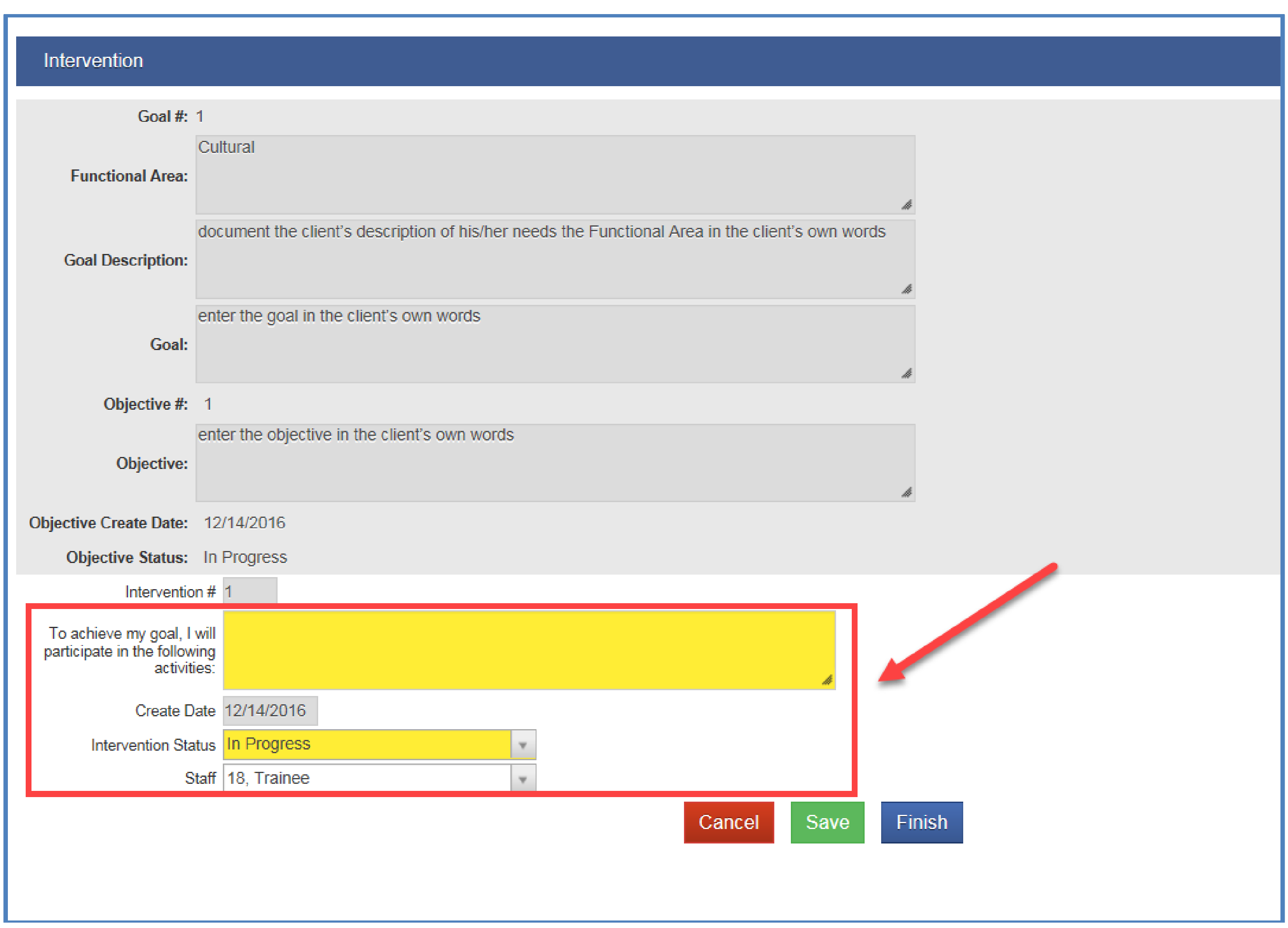
and click 

to navigate back to the Treatment Plan Outline.

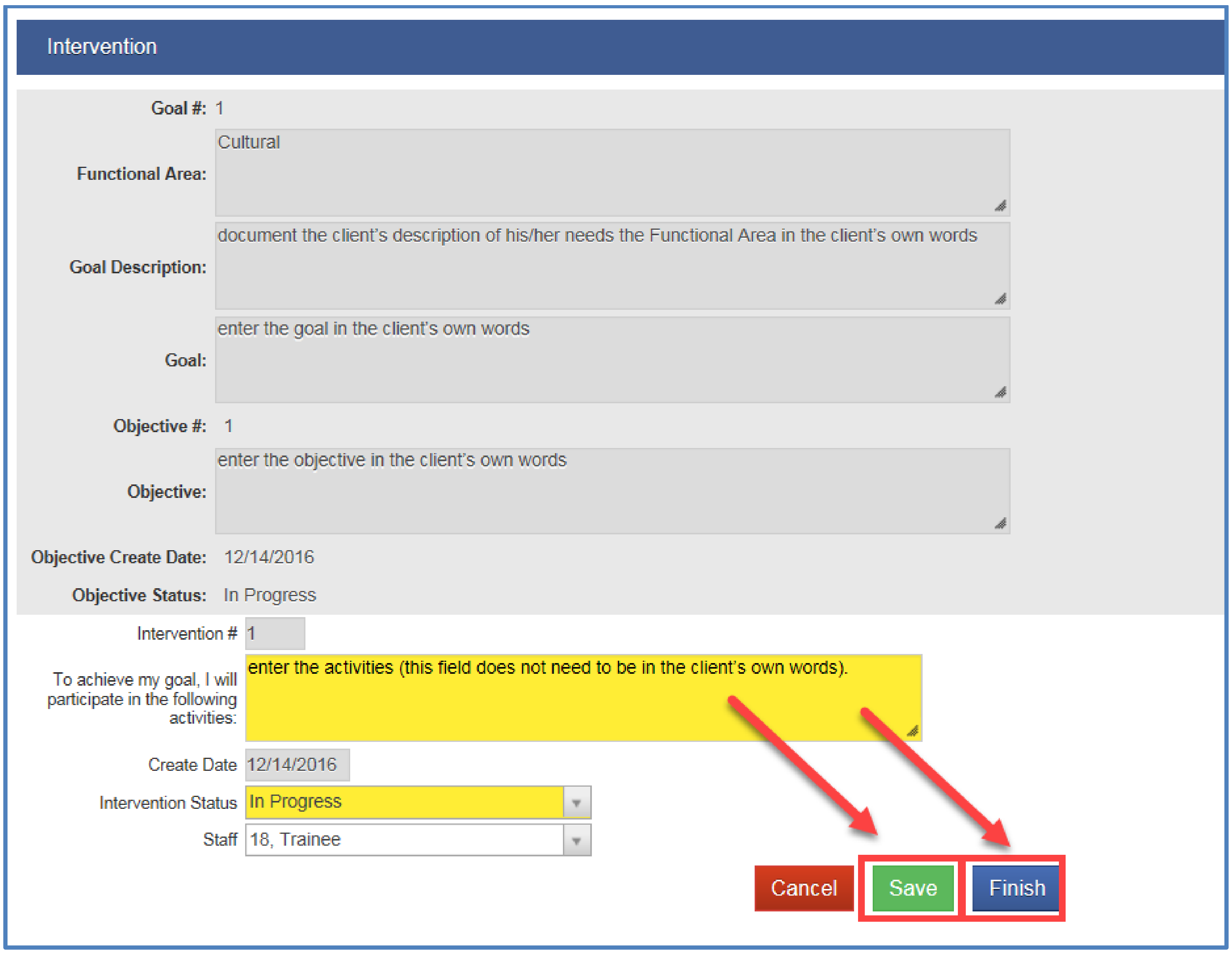


22. Click Add Intervention to add Interventions to the associated Objective.

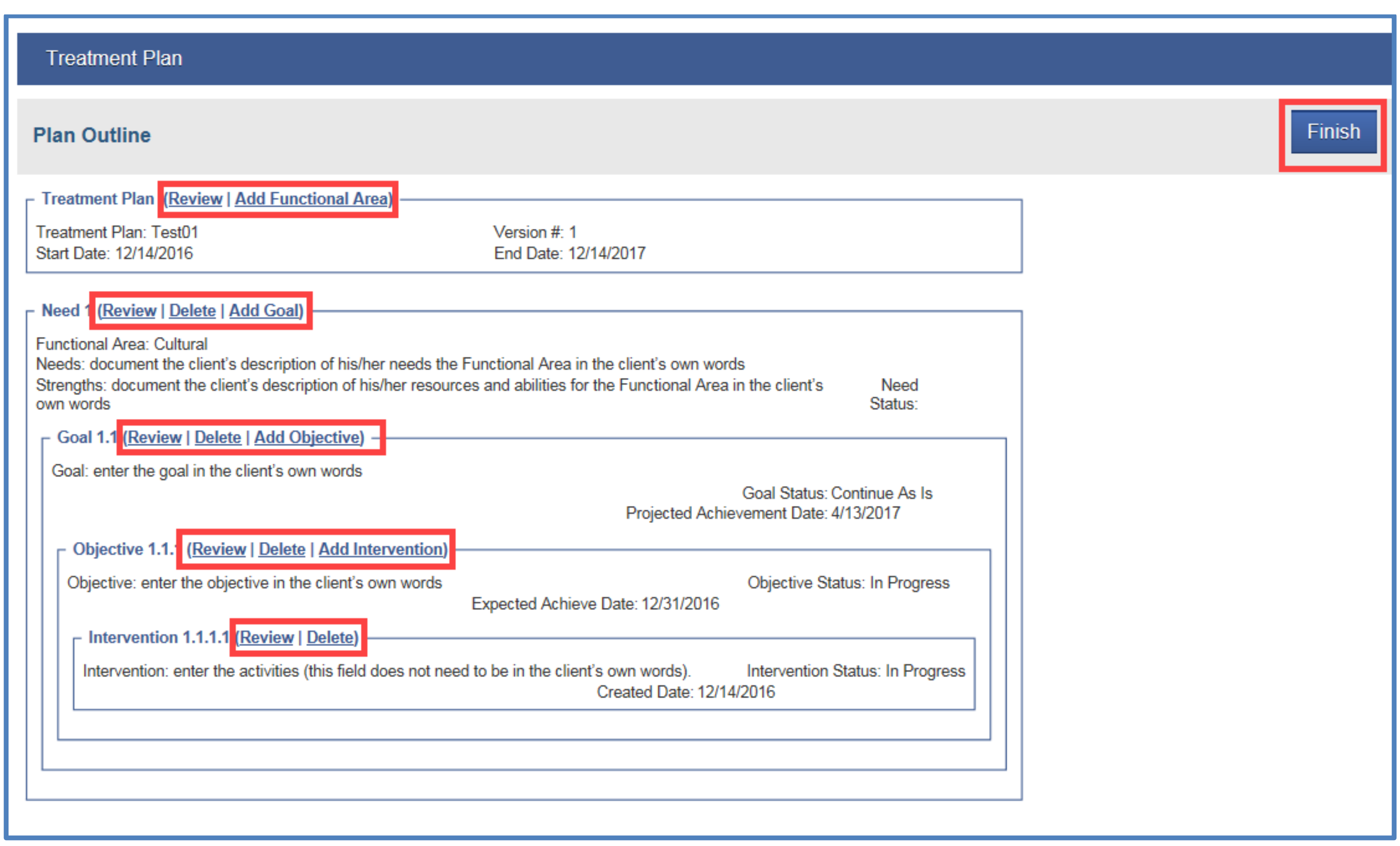
WITS populates the following fields on the Intervention screen as Read Only from the Client Goal Profile and the Objective screen: Goal #, Date Assessed, Functional Area, Strengths/Limits, Goal Description, Goal.



23. Complete the following fields
- To achieve my goal, I will participate in the following activities – enter the activities
- Intervention Status – the field will populate as In Progress.
- Responsible Party/Participants – enter the name of the responsible party/participants.



24. Click Save and click Finish to navigate back to the Treatment Plan Outline.



25. To edit or to add new activities, click on the links located to the right of each heading.

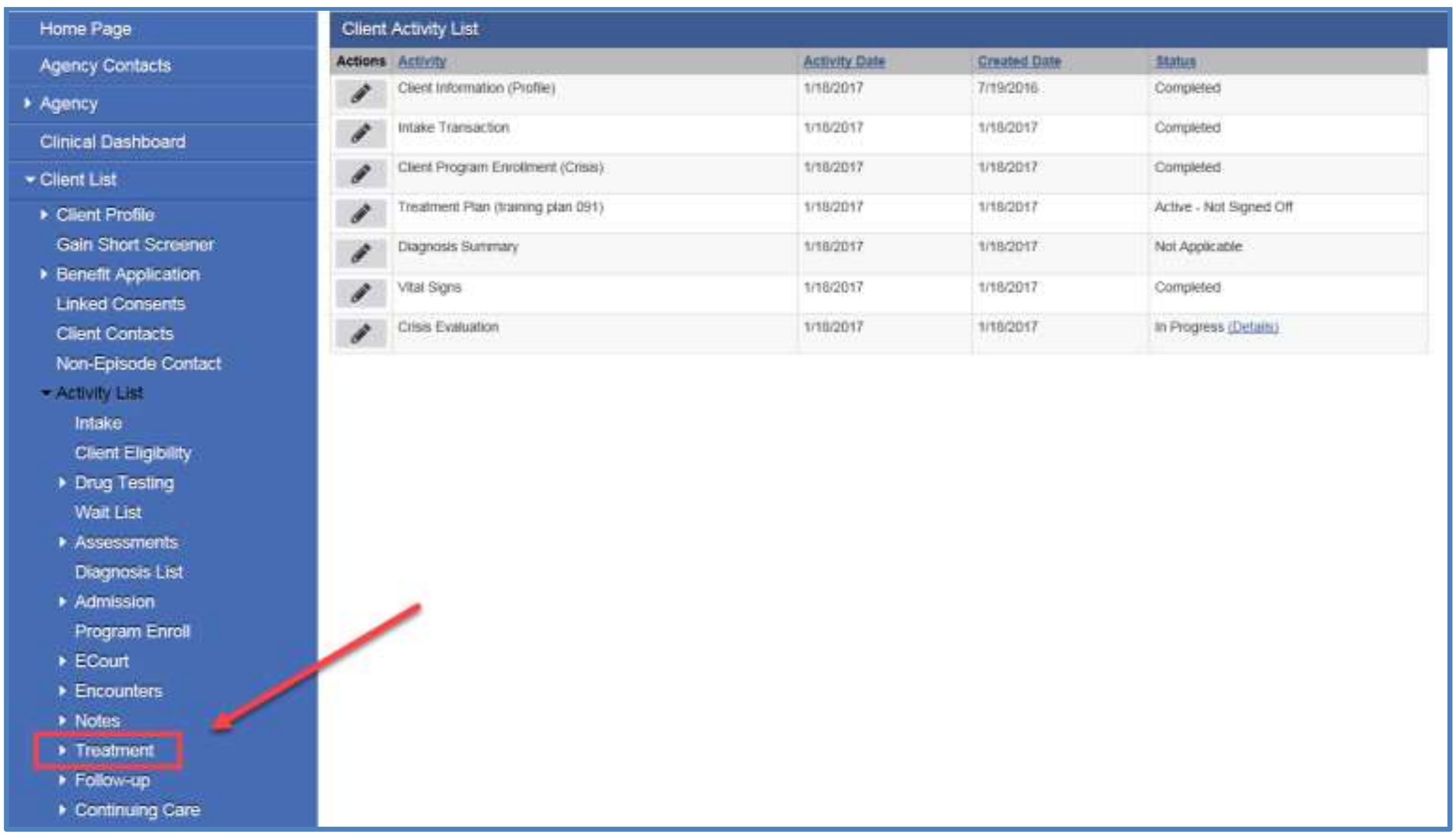
26. Click Finish if you would like the Treatment Plan to remain in Active – Not Signed Off status. This means the Treatment Plan can be edited and signed at a later date.

27. Otherwise, follow these directions to electronically sign the Treatment Plan

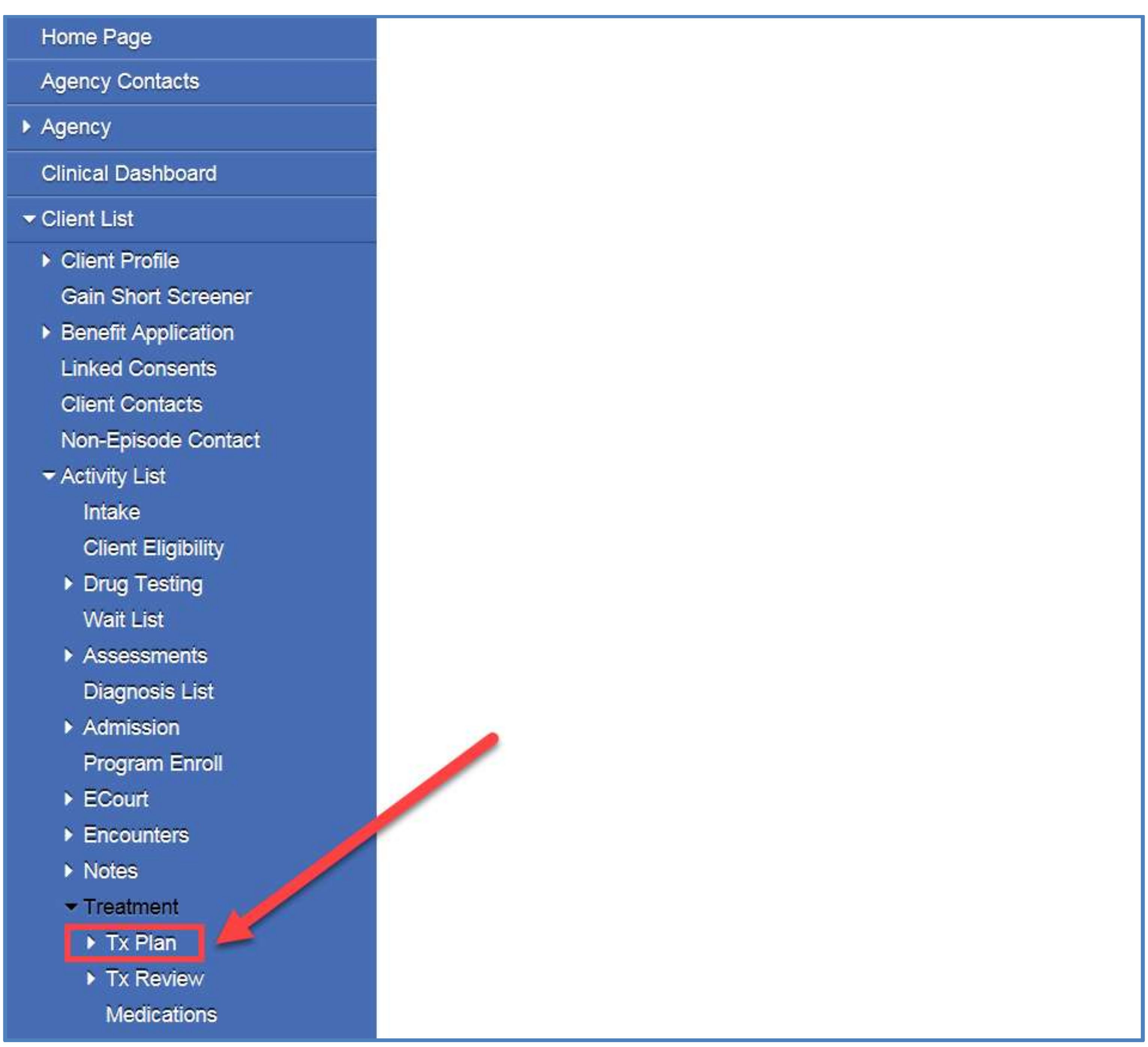
Electronically Signing the Treatment Plan

Once a Treatment Plan is signed, it cannot be changed or edited.

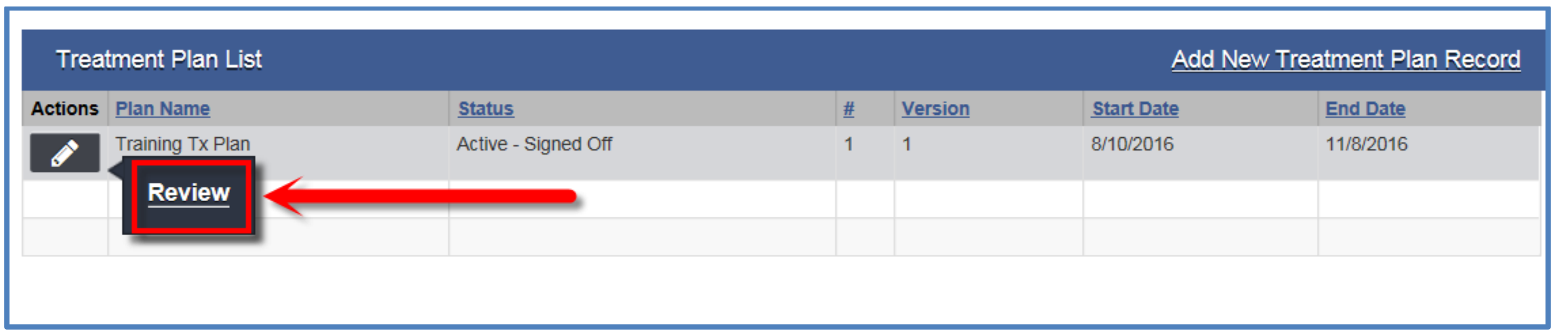
1. Begin on the Client Activity List.



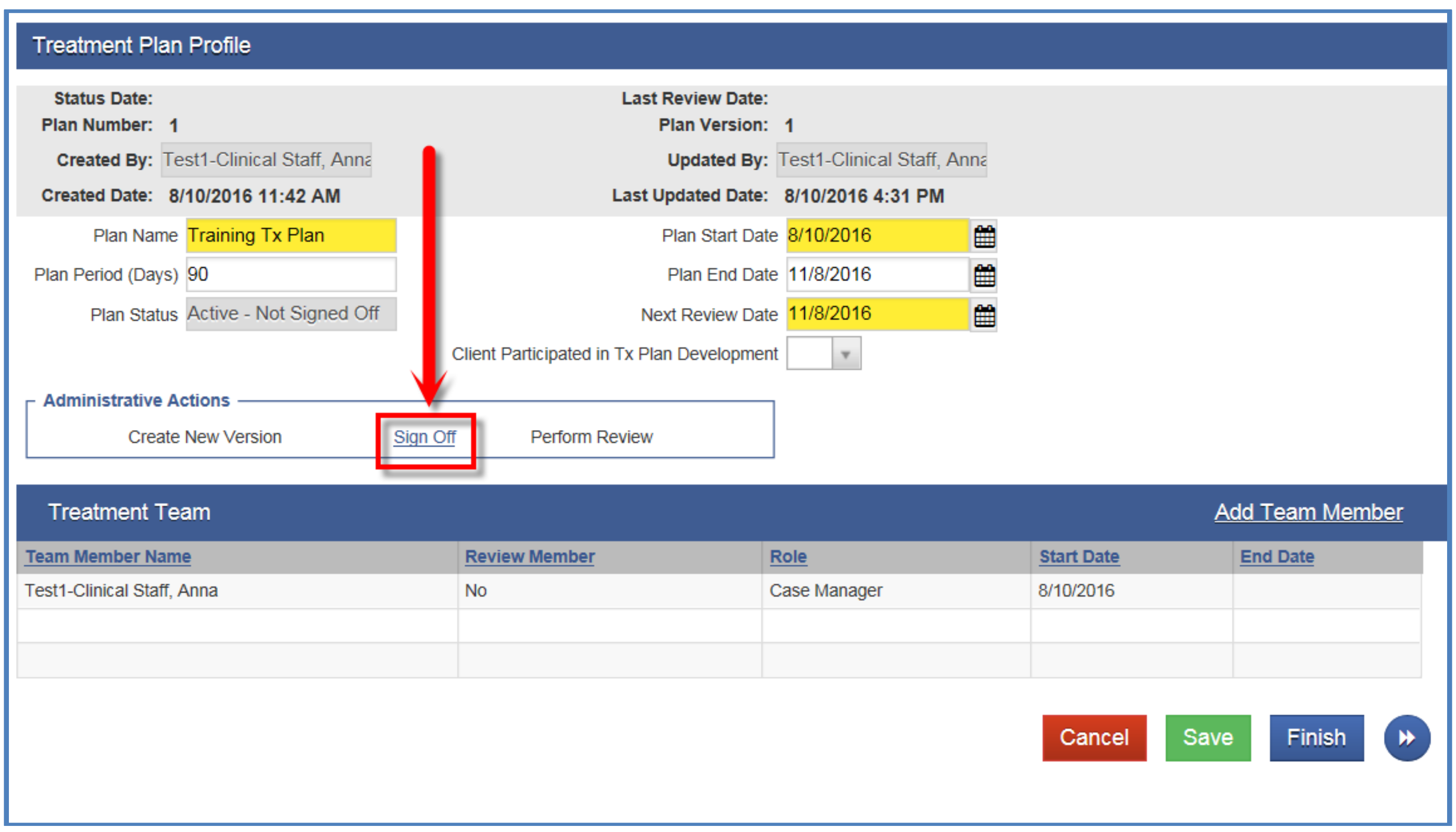
2. Click Treatment on the blue navigation pane.



3. Click Tx Plan on the blue navigation pane.

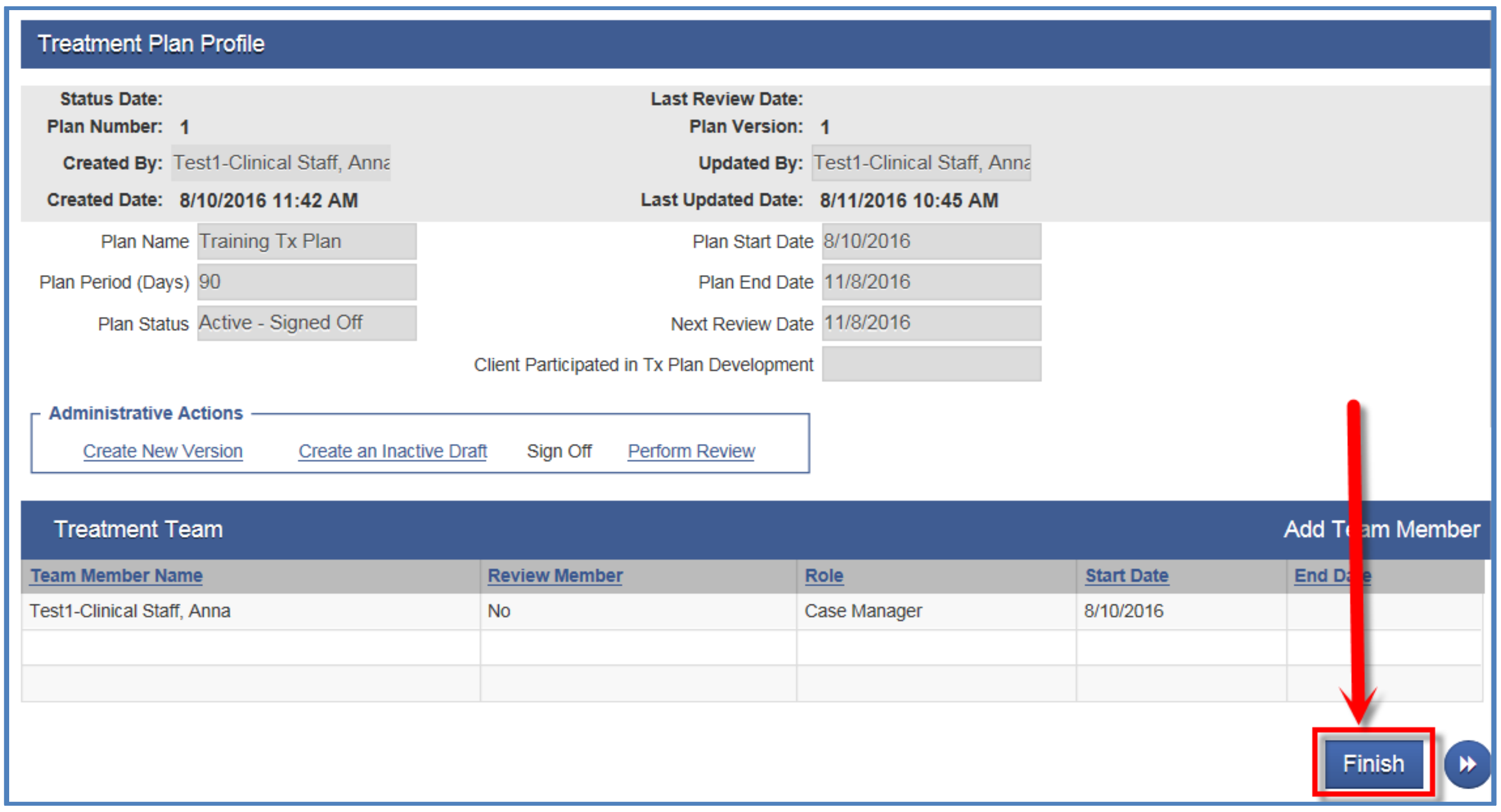


4. Hover over the pencil icon and click Review.



5. Click Sign Off in the Administrative Actions section of the Treatment Plan Profile.

6. Click Yes to electronically sign the Treatment Plan or click No to cancel.

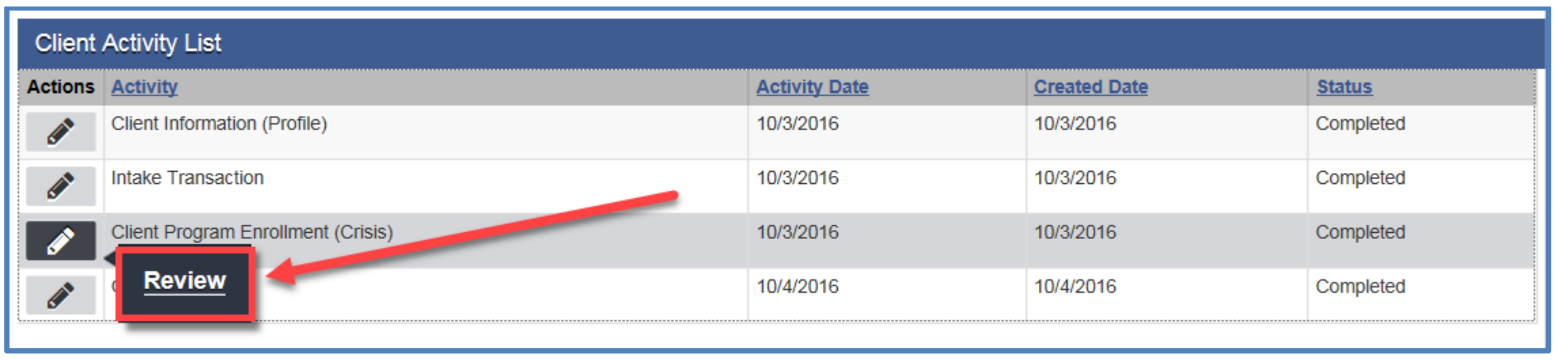


7. The Treatment Plan becomes Read Only. Click Finish.
8. Create Miscellaneous Notes to document services delivered to the client.
9. When client is ready to discharge, close the Crisis Program Enrollment

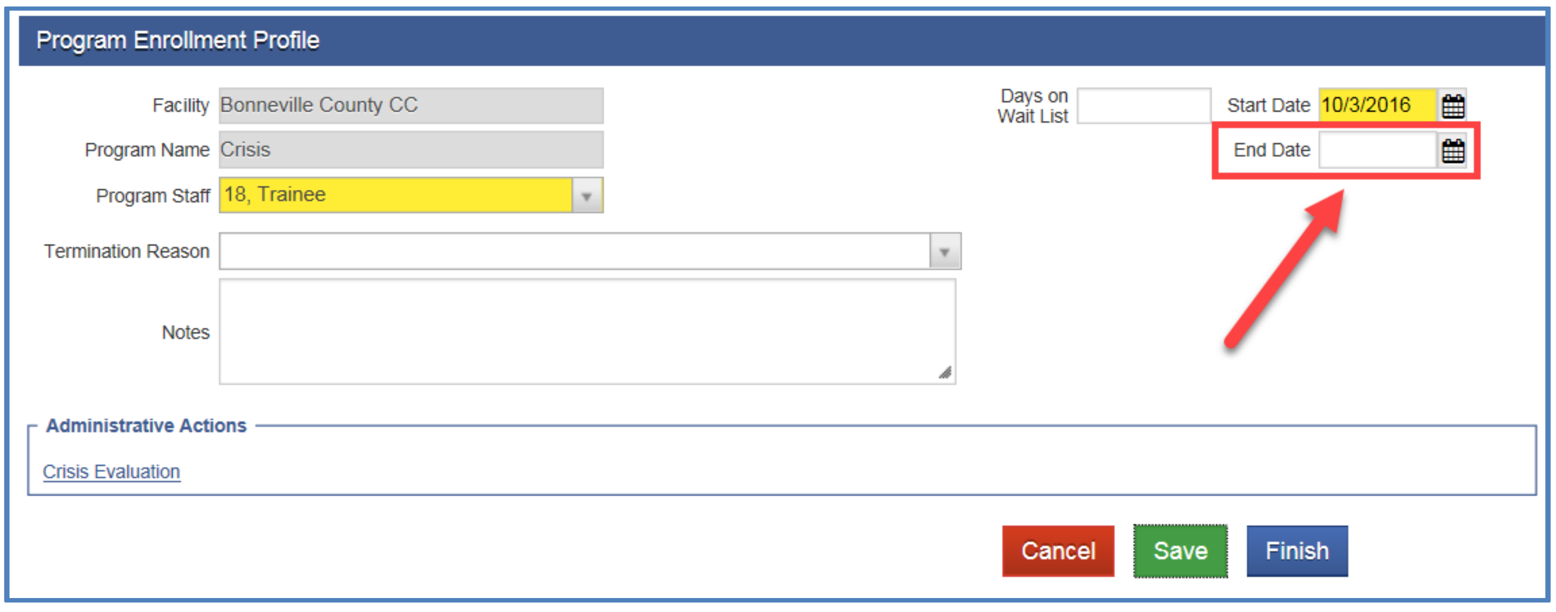
Closing a Crisis Program Enrollment

The Crisis Evaluation must have a status of completed before the Crisis Program Enrollment can be closed.

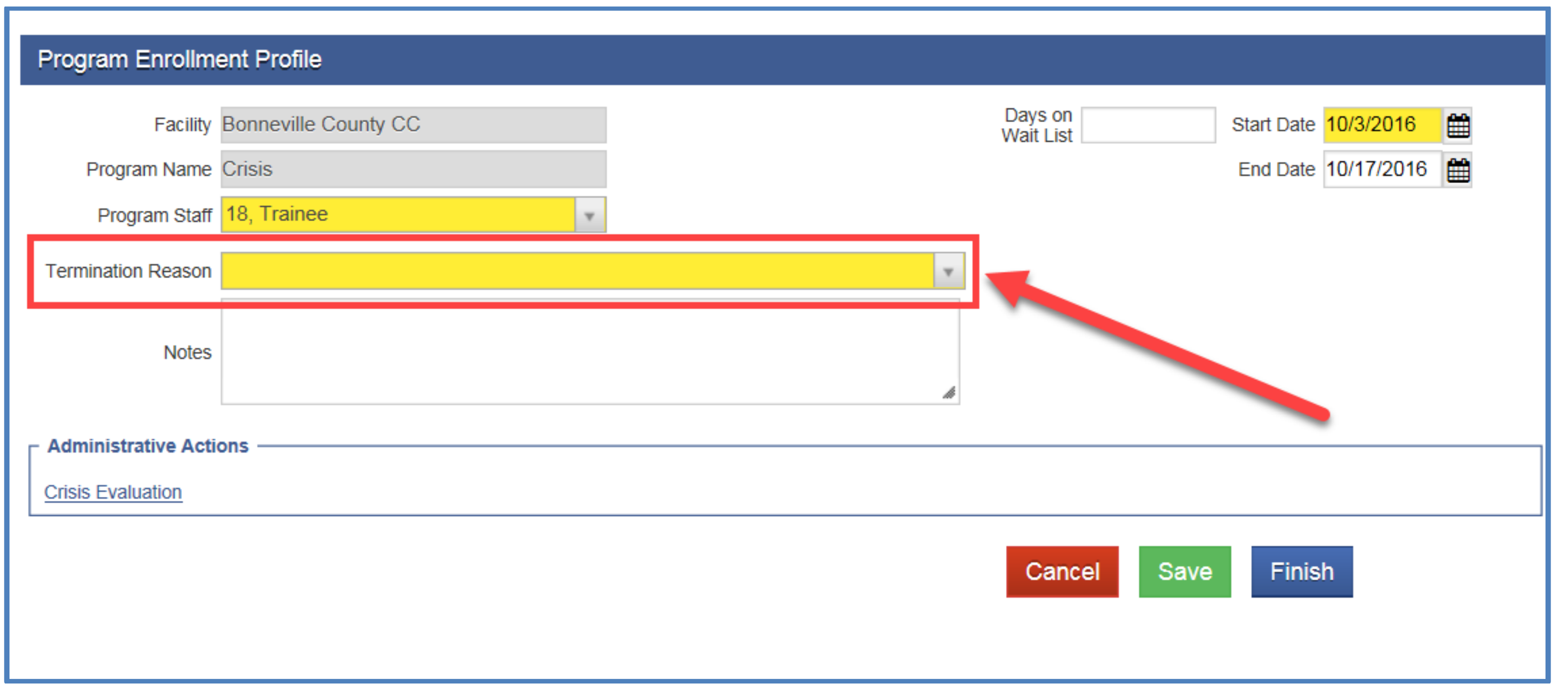
1. Begin on the Client Activity List.



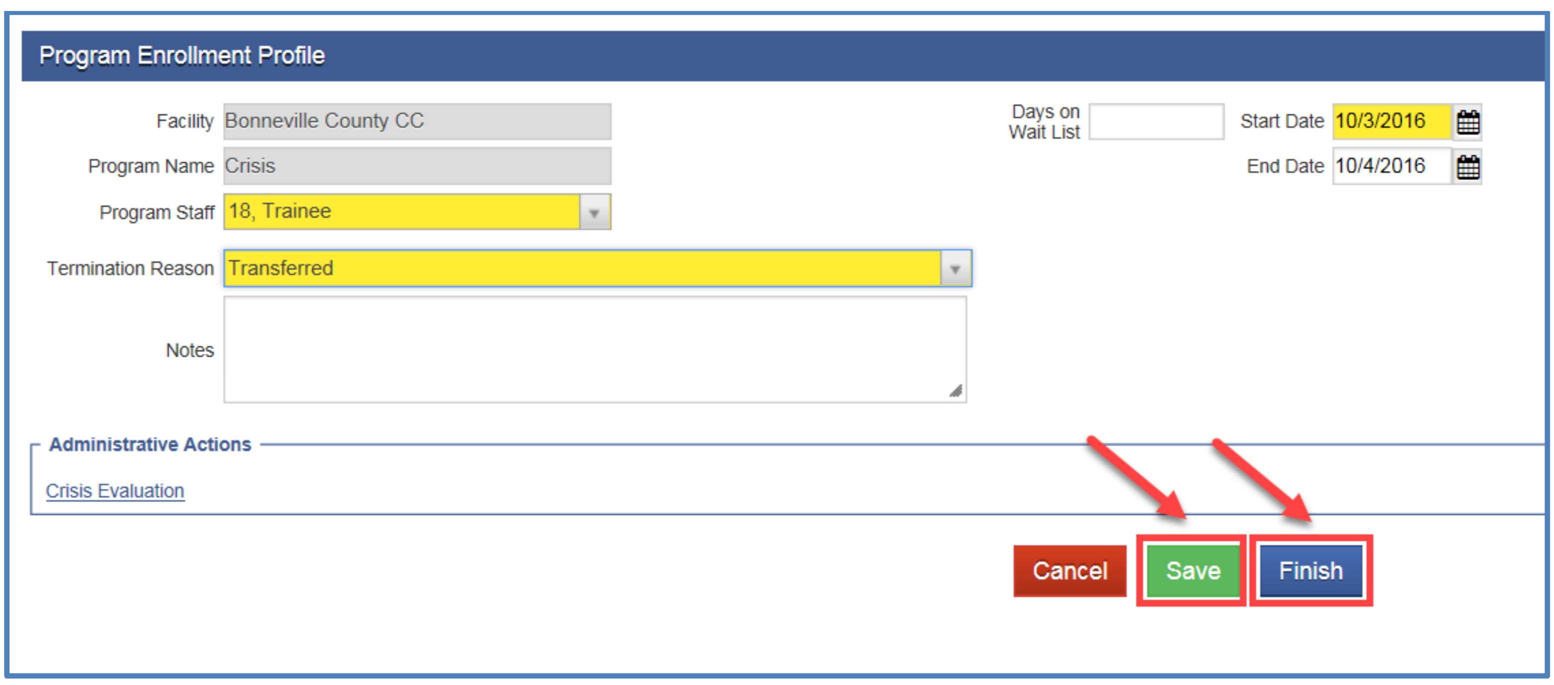
2. Once you're on the Client Activity List, hover over the pencil icon and click Review under Actions for the Crisis Program Enrollment.



3. Enter the End Date (date the client is leaving the BHCCC).



4. Select the Termination Reason (why the client is leaving the BHCCC).



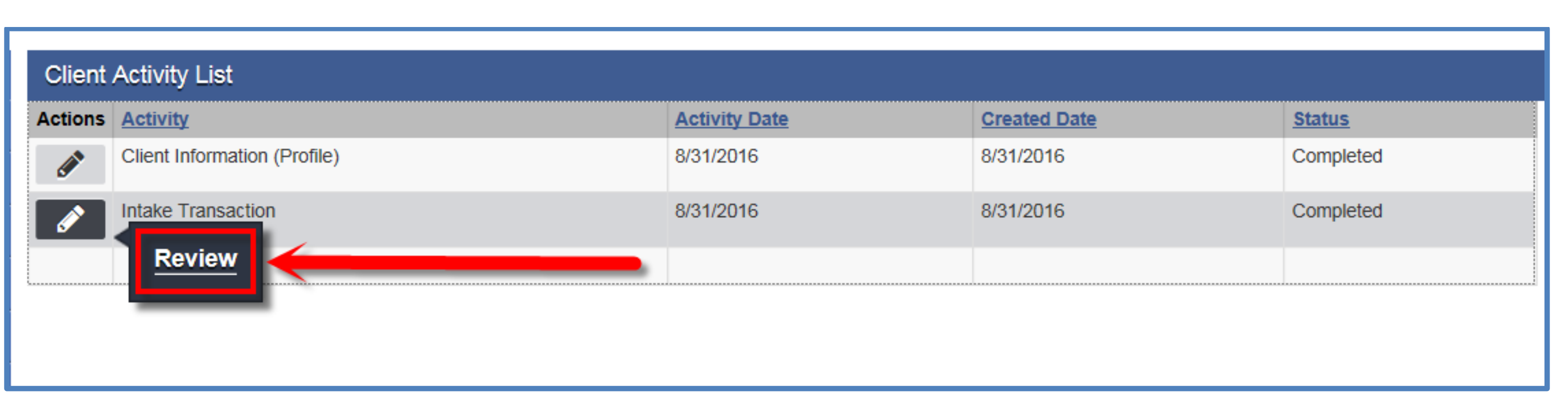
5. Click Save and Finish.

6. After closing the Crisis Program Enrollment, close the Intake. This closes the episode of care in WITS.

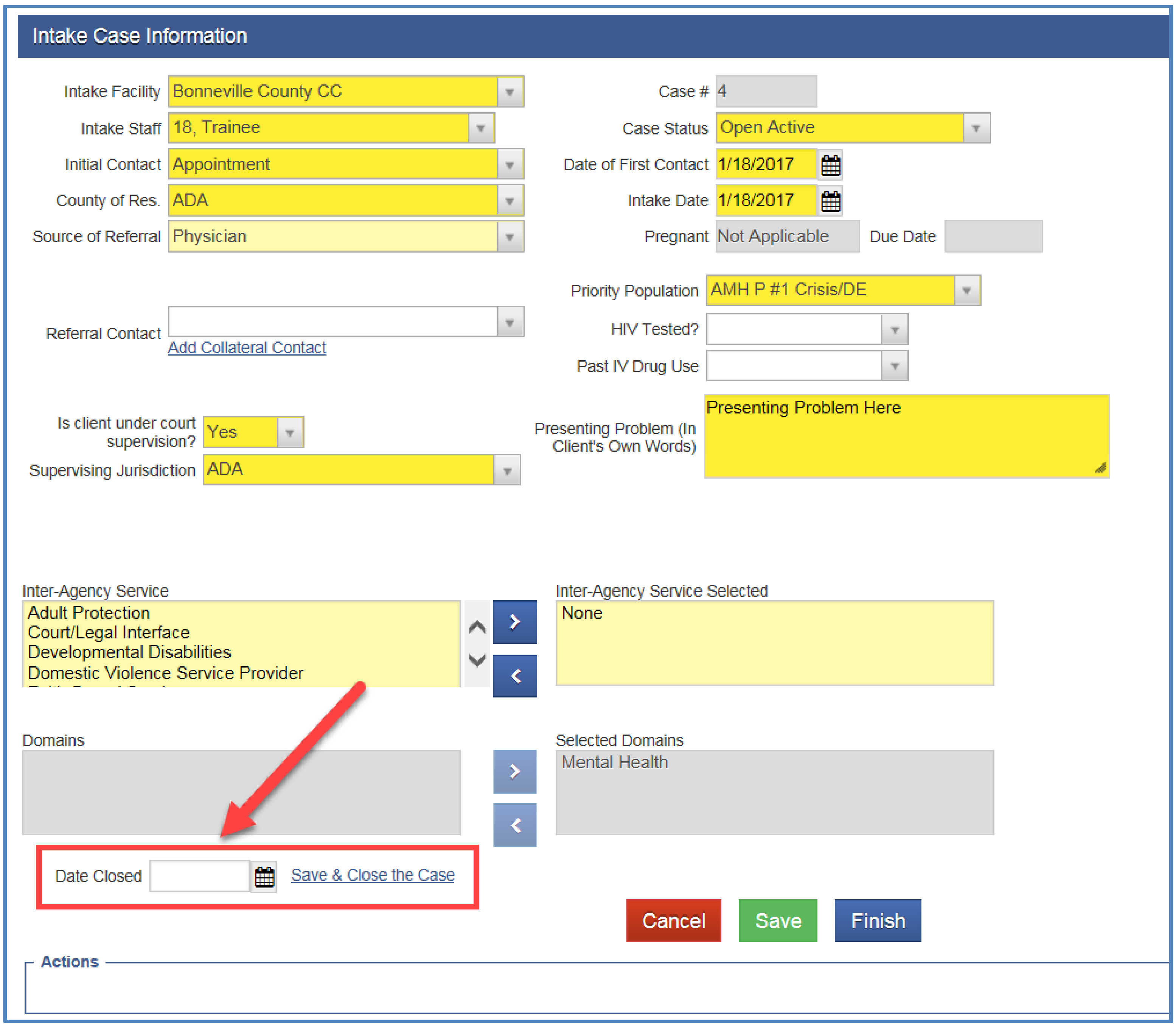
Closing an Intake (Episode of Care)

The following records must be complete before an Intake can be closed: Client Profile, Crisis Evaluation, and Crisis Program Enrollment.

1. Begin on the Client Activity List.

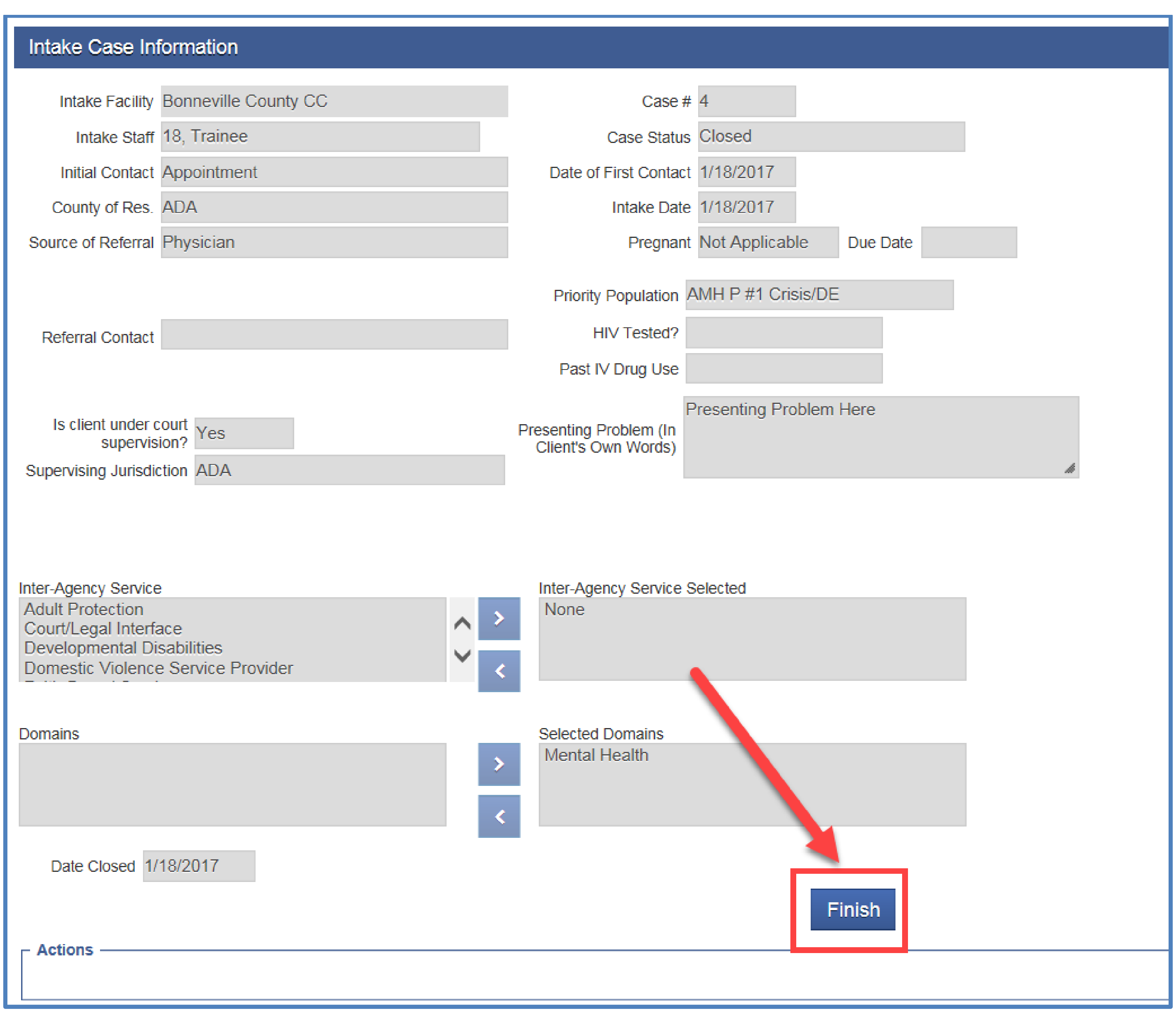


2. Once you're on the Activity List, hover over the  and click Review under Actions for the Intake.



3. Complete the following fields.
   - Date Closed – enter the last date of contact with the client.

4. Click Save & Close the Case.

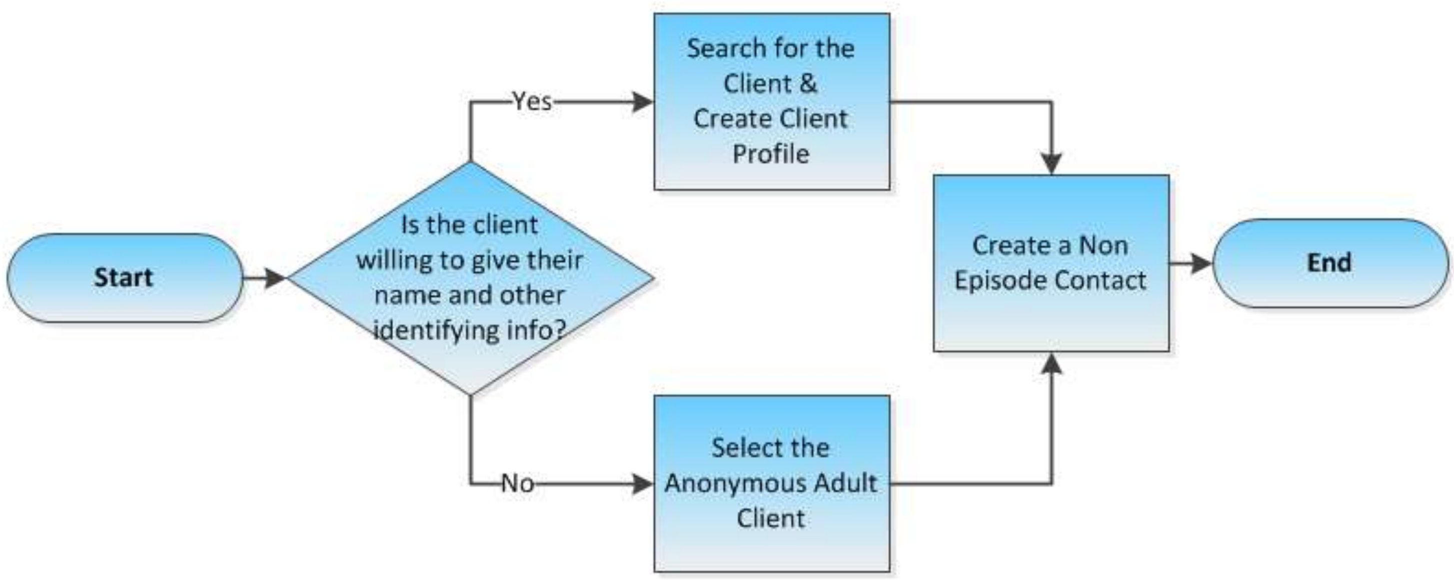


5. The Intake becomes Read-Only. Click Finish.

Process when Clients are not Present

If you would like to print information from this page, make sure to expand as many sections as desired and then click the Print icon in the upper right corner of the page.

When a client contacts the Crisis Center by phone, document it in WITS using the client flow and instructions that best fit your situation.

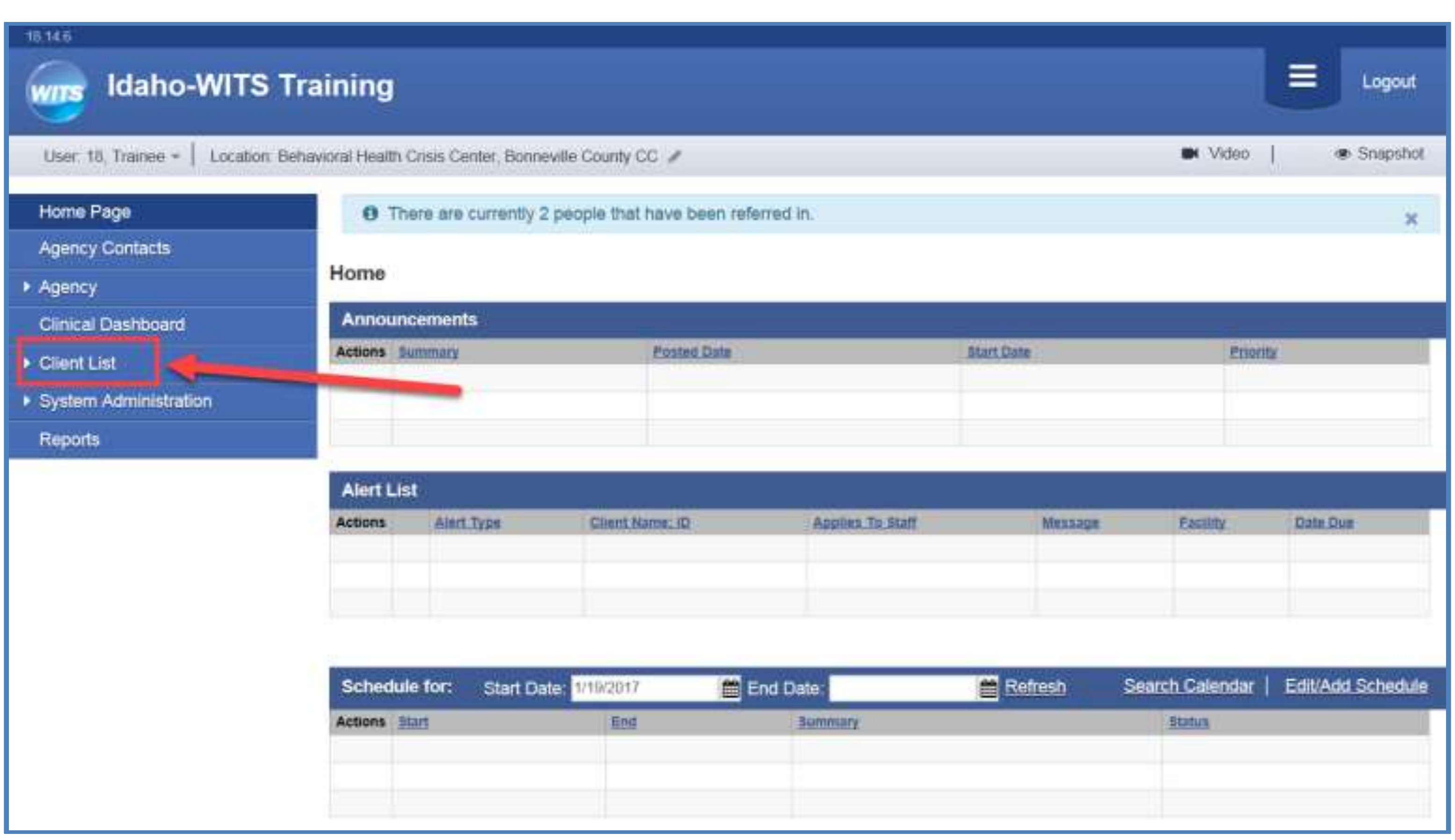


If the client is willing to give their name and other identifying information:

1. Search for the client in WITS to see if the client already exists in your agency.

How to search WITS to see if the client already exists

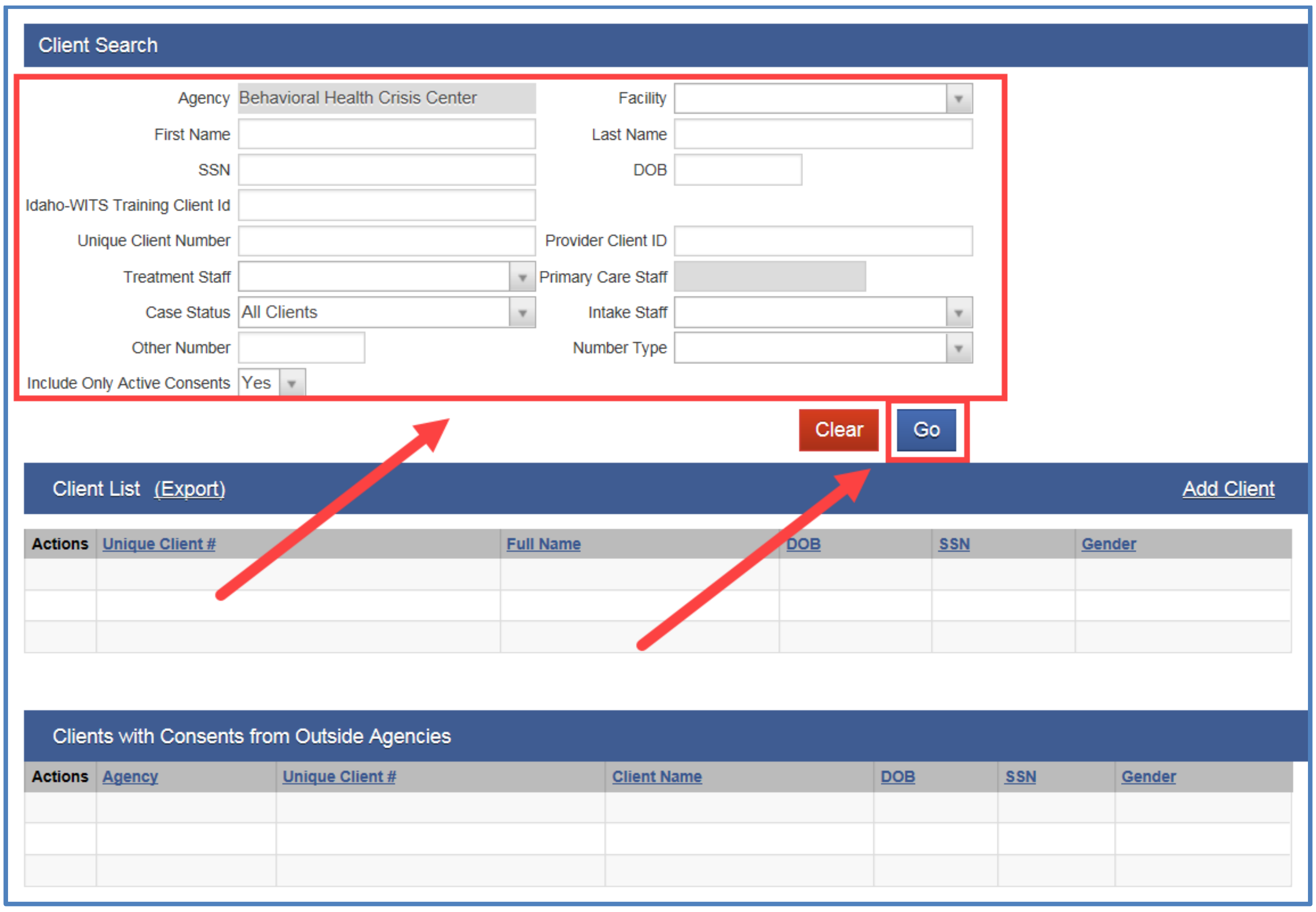
1. Begin on the Home Page.



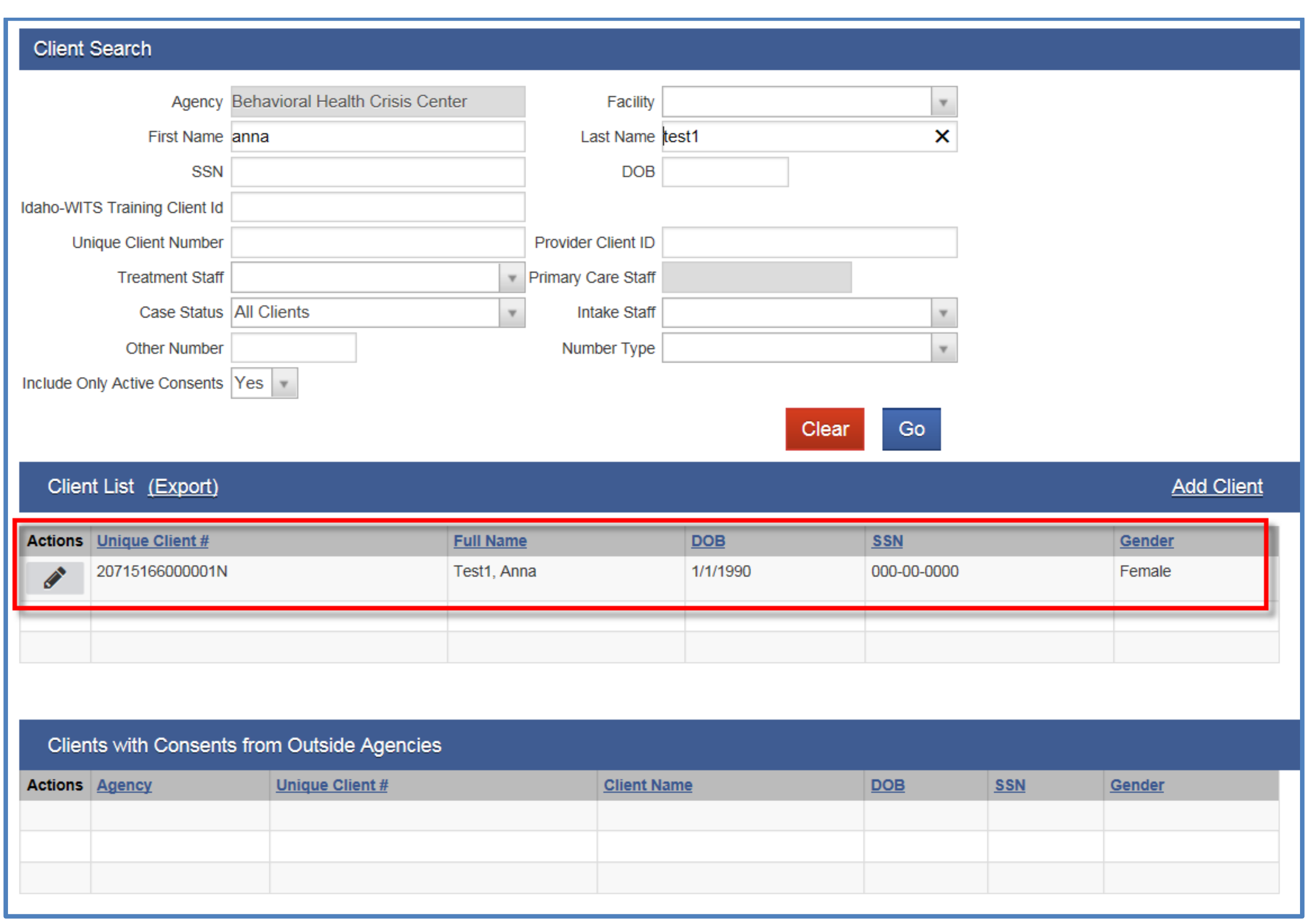
2. Click Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

To view only Active Clients, select a Case Status of Clients with Open Cases.



3. Enter search criteria on the Client Search page and click Go.



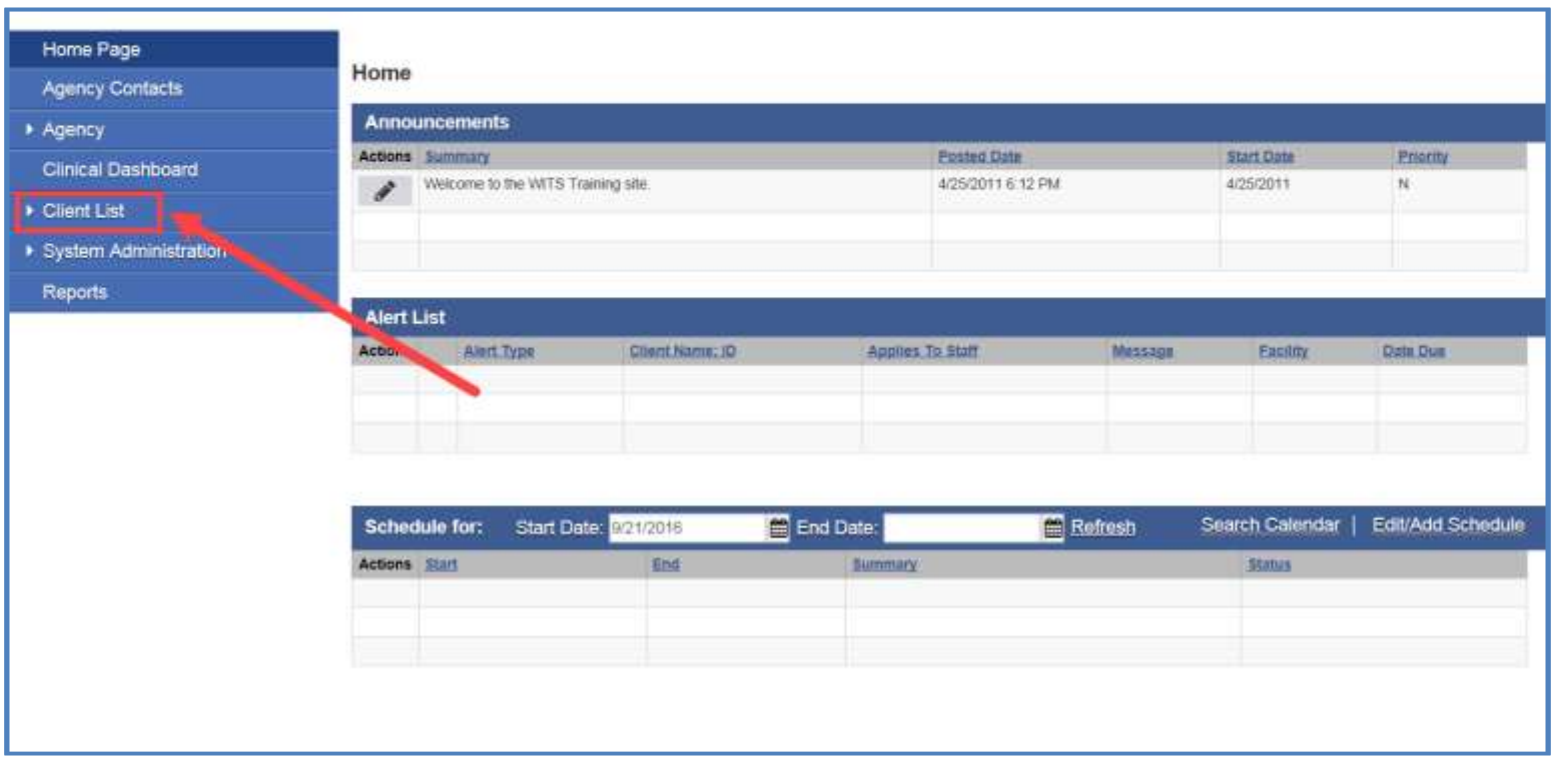
4. If your search locates your client, he or she will be listed under the Client List section as shown above. This means the client has been at the BHCCC before and you can skip the next step of Creating a New Client.

5. If your search does not locate your client, he or she will not be listed under the Client List section. Proceed to the next step by Creating a New Client.

Creating a New Client

Before you create a new client record, always search for the client as shown below. This will help you to avoid creating duplicate clients.

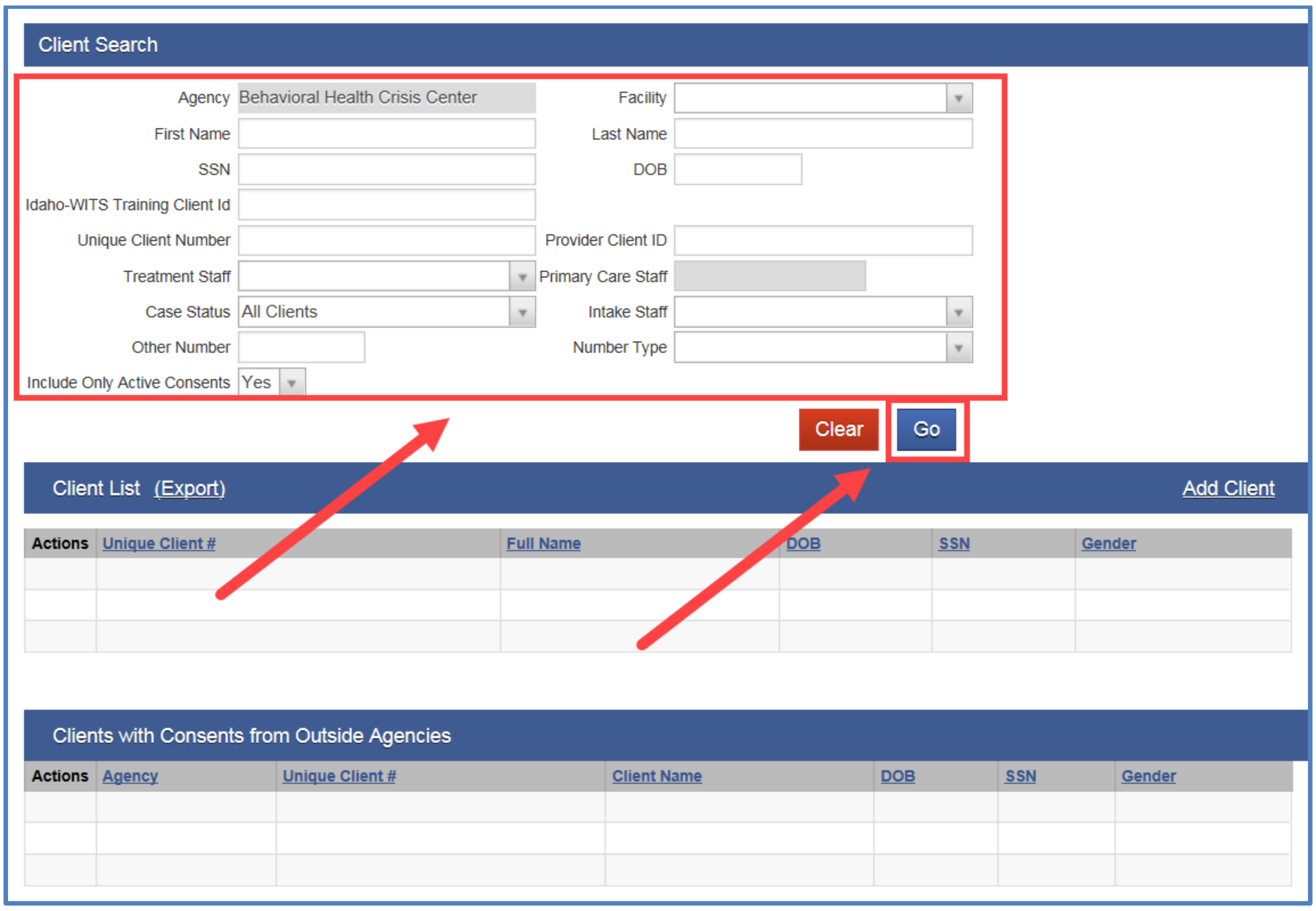
1. Begin on the Home Page.



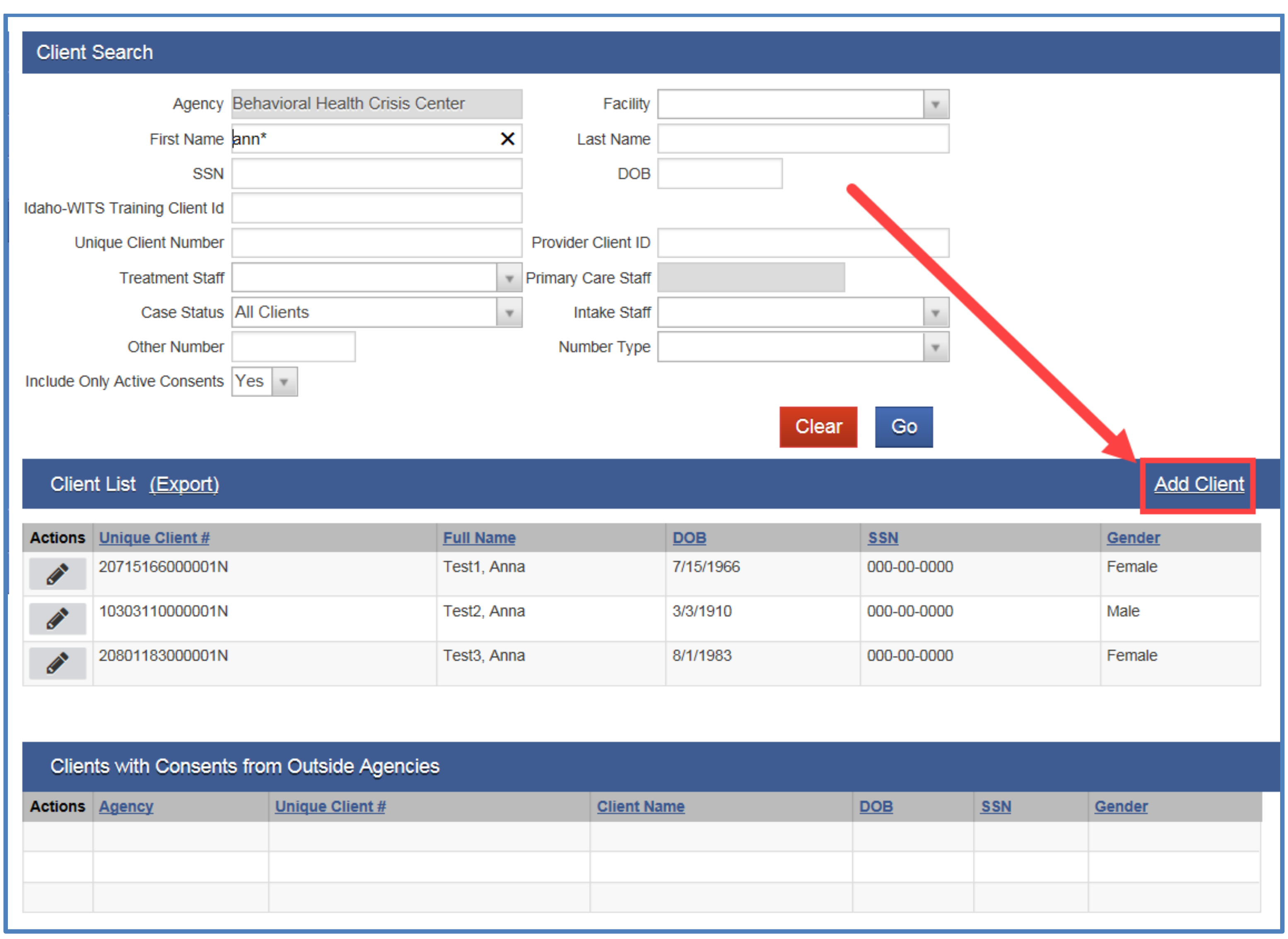
2. Click Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

To view only Active Clients, select a Case Status of Clients with Open Cases.



2. Enter the search criteria and click Go.



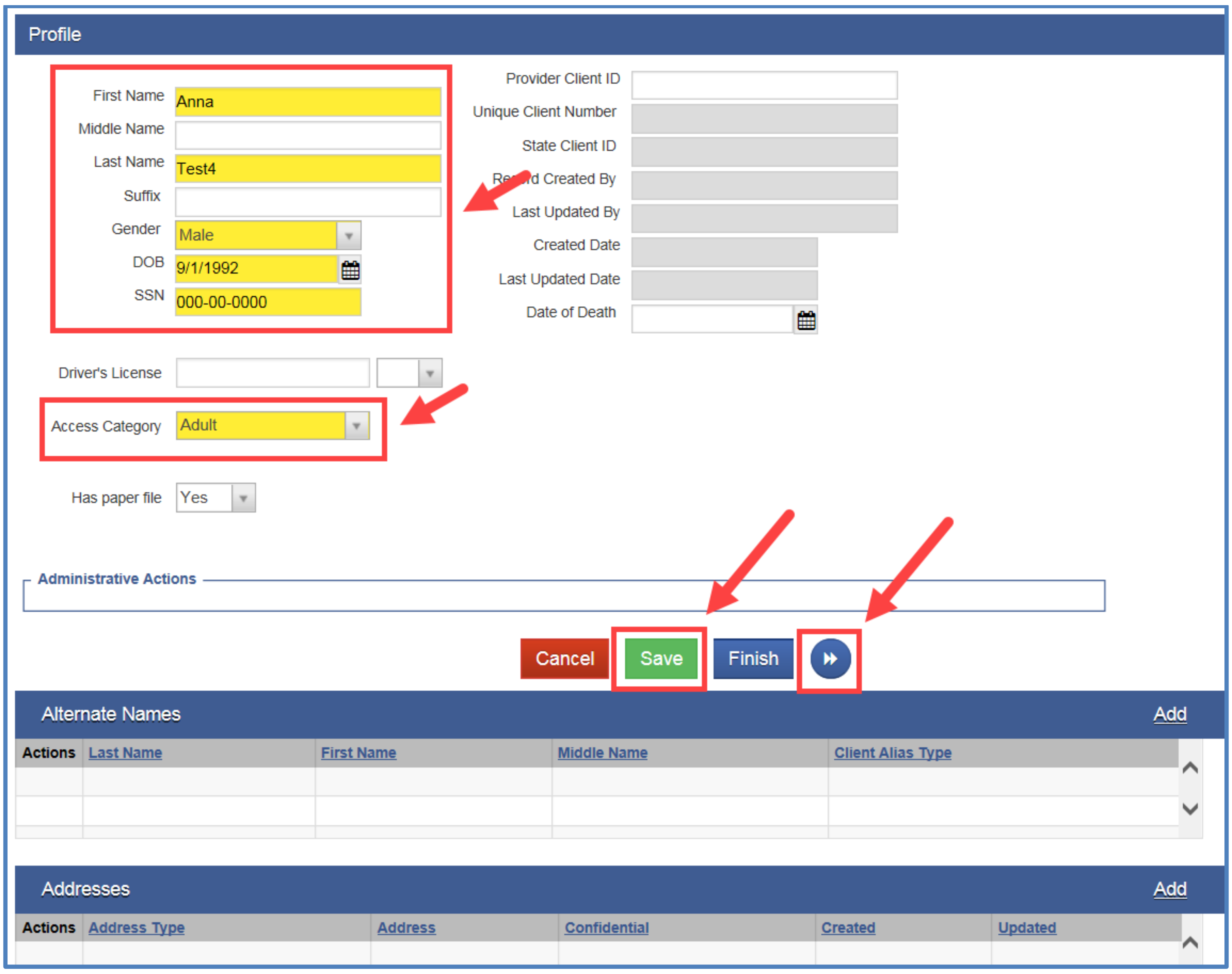
3. If you do not find your client in the Client List, click Add Client.

4. The Profile page will display.

Profile

The First Name, Gender, DOB, and SSN fields are particularly important, as this data feeds into the system generated Unique Client Number field. Once the Unique Client Number has been created by WITS and there is an Intake for the client, it cannot be changed. Make sure that information is entered accurately, as it will affect future searches for the client in WITS.

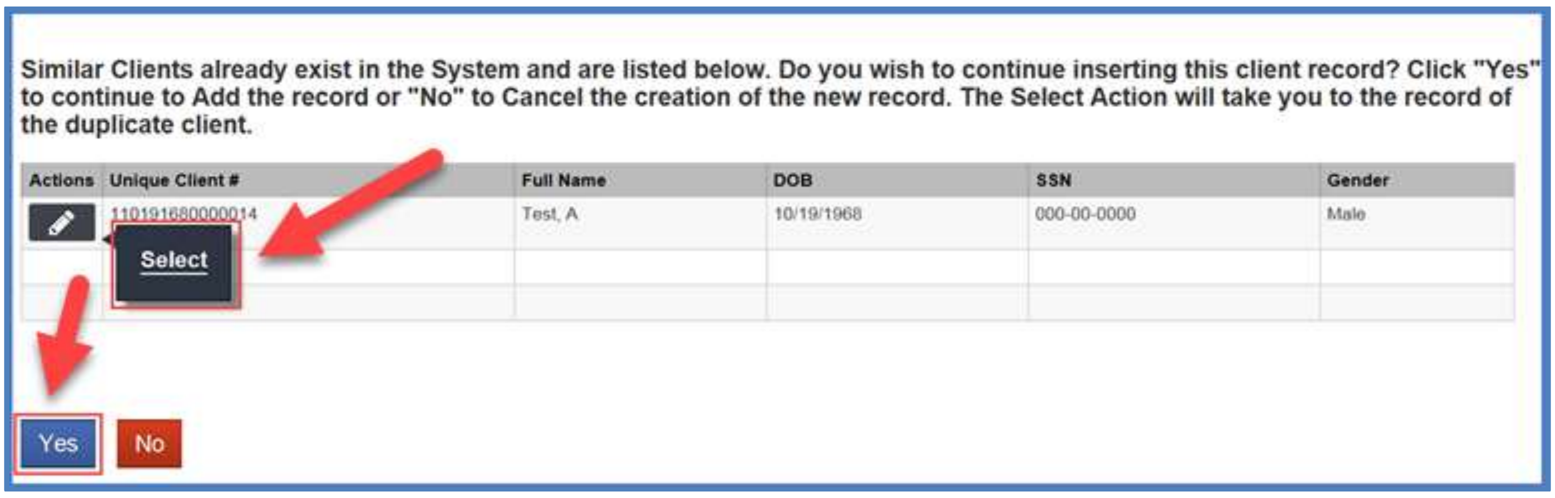
Warning messages will display if the client is over 75 years old or less than 5 years old.



1. Complete the following fields.
   - First Name – enter client's first name
   - Last Name – enter client's last name
   - Gender – select the client's gender
     - Female
     - Male
     - Refused
     - Transgender Female: person designated male at birth but identifies as female
     - Transgender Male: person designated female at birth but identifies as male
     - Unknown
   - Date of Birth – enter client's birth date as MM/DD/YY
   - Social Security Number – it is very important to get the clients SSN up front. However, if this is not possible, the system will accept 000-00-0000 as a SSN. This is the only SSN that may be entered WITS more than once.

2. Click Save and click .

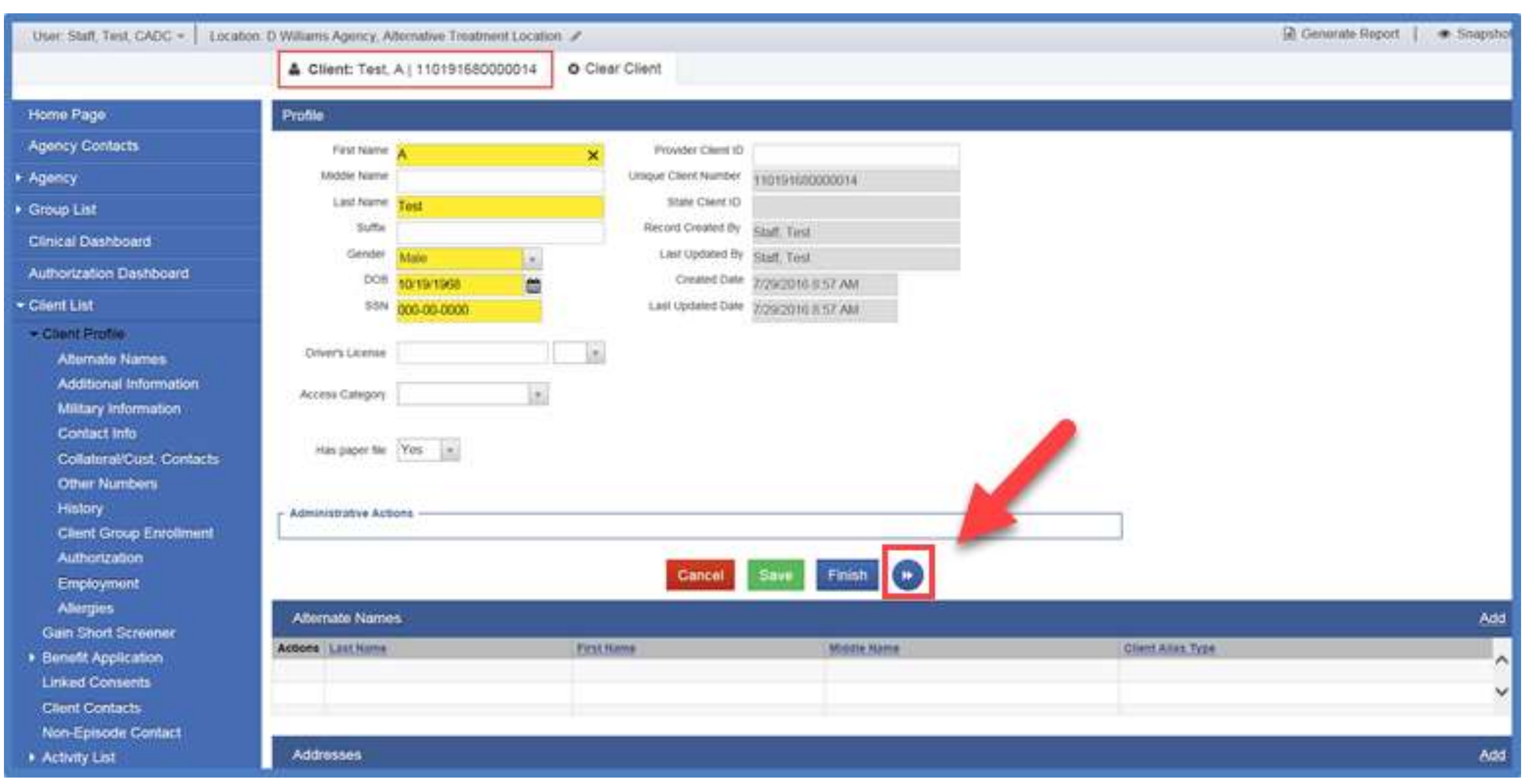
WITS is designed to prevent duplicate records. Based on first name and date of birth, the system will display a list of potential duplicates and the message below during the process of creating a client record. **When there are no potential duplicates, the below message will not display.**



3. Click and **Select** under Actions to go to the Client Profile if it is the same client (the client exists in WITS).

OR

4. Click **Yes** to continue to add the client you entered ***(if the new client is not a duplicate client record).***



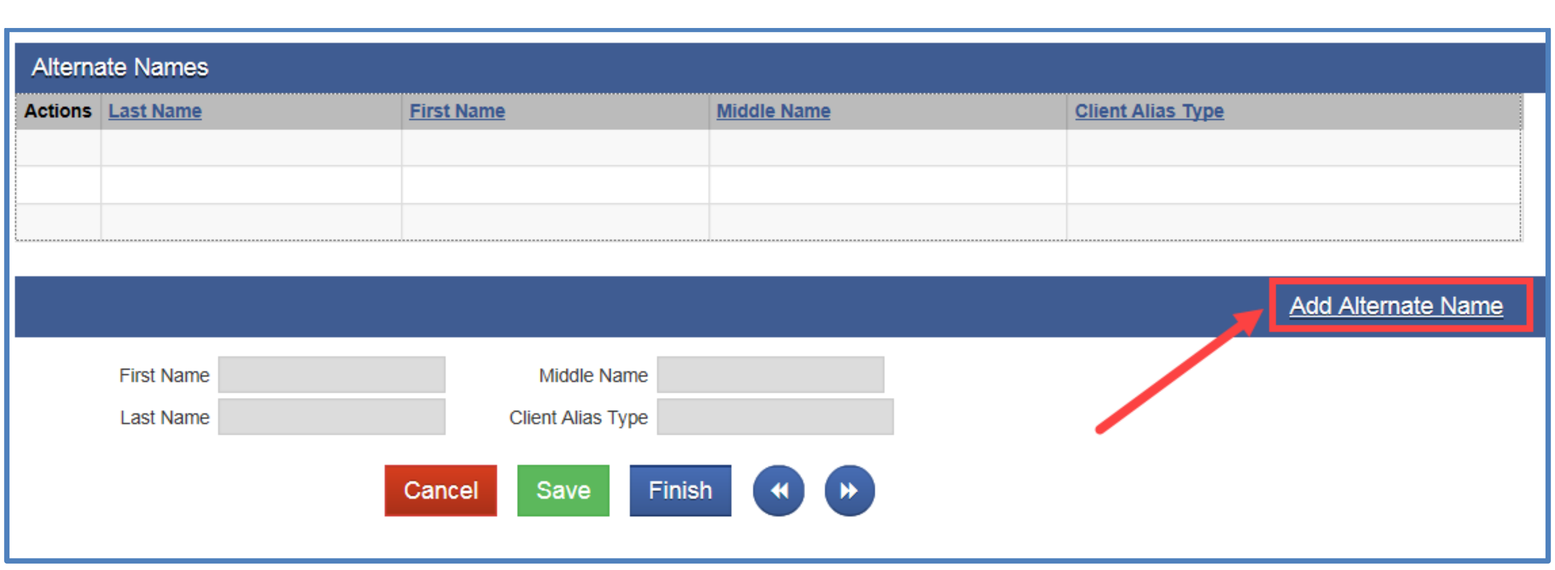
5. Once the client is created, the client's name appears in the Context area of the WITS Context Bar.

6. Click .

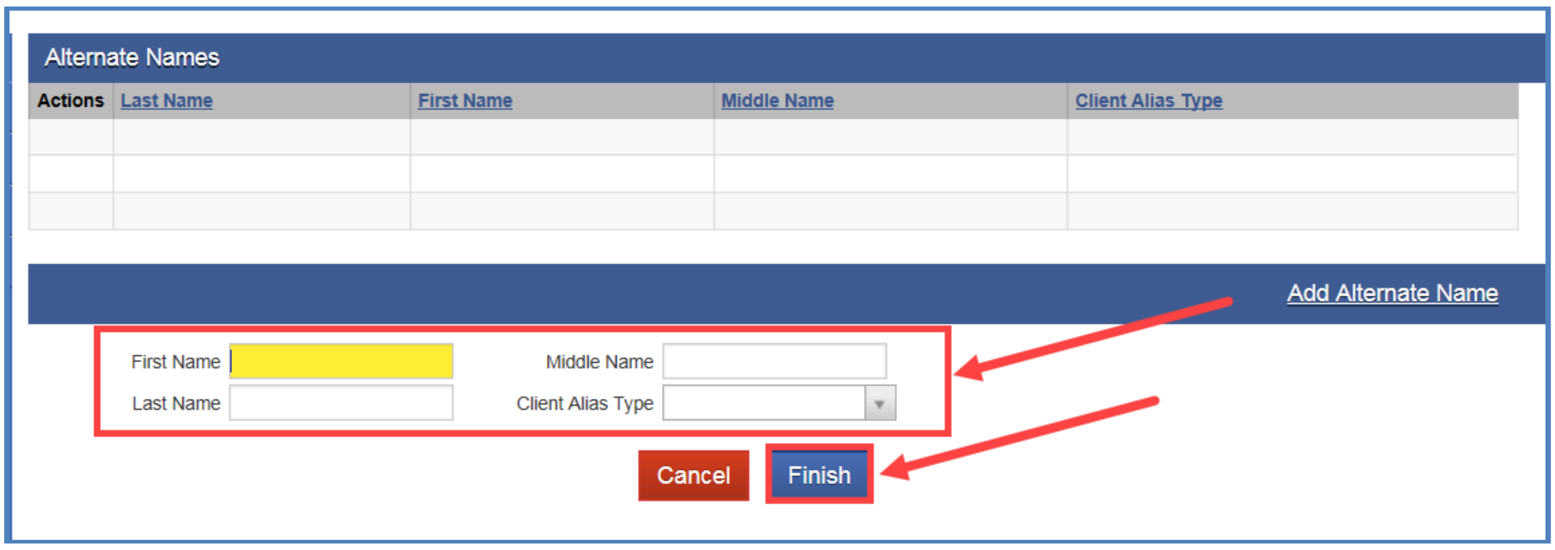
7. The Alternate Names page will display.

Alternate Names

Enter all known alternate names (alias, street name, etc.) used by the client (these are searchable items on the Client Search page).

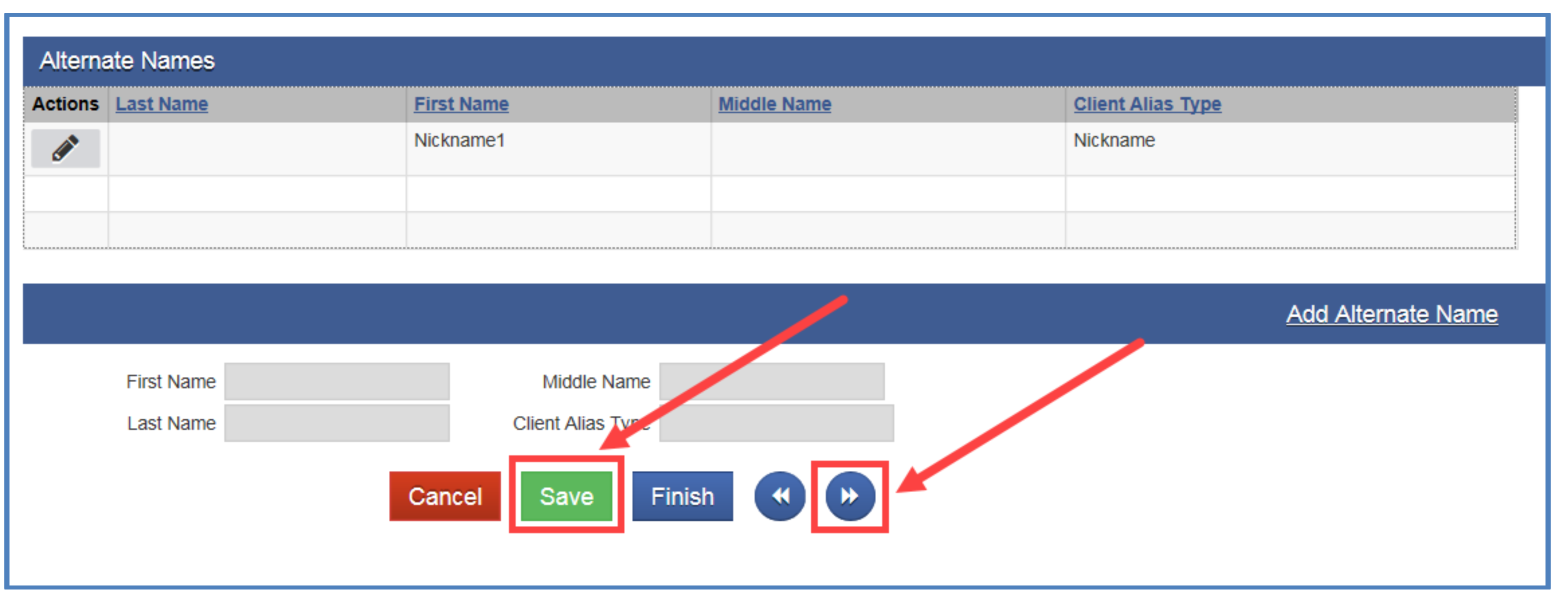


1. Click Add Alternate Name.



2. Complete the following fields.
   - First Name – enter the client's alternate first name.
   - Client Alias Type – select the alias type.

3. Click Finish.

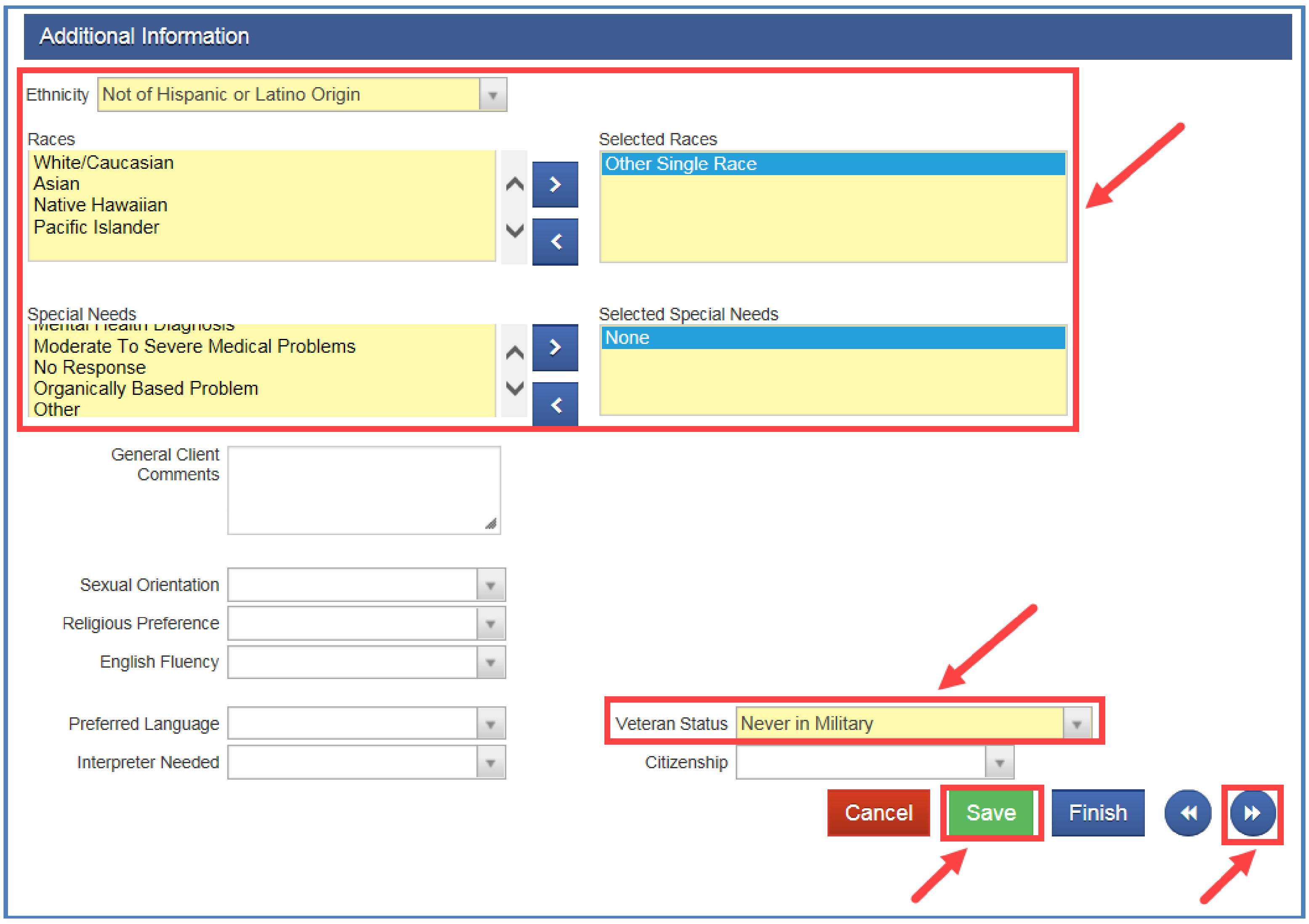


4. Click Save and click .

5. The Additional Information page will display.

Additional Information

Ethnicity: Other Specific Hispanic or Latino is defined as: of known Central or South American or any other Spanish culture or origin (including Spain), other than Puerto Rican, Mexican, or Cuban, regardless of race.



1. Complete the following fields.
    - Ethnicity – select client's ethnicity.
    - Races – select all applicable race(s) and move to Selected Races.
    - Special Needs – select all applicable special needs and move to Selected Special Needs.
    - Veteran Status – select client's veteran status.

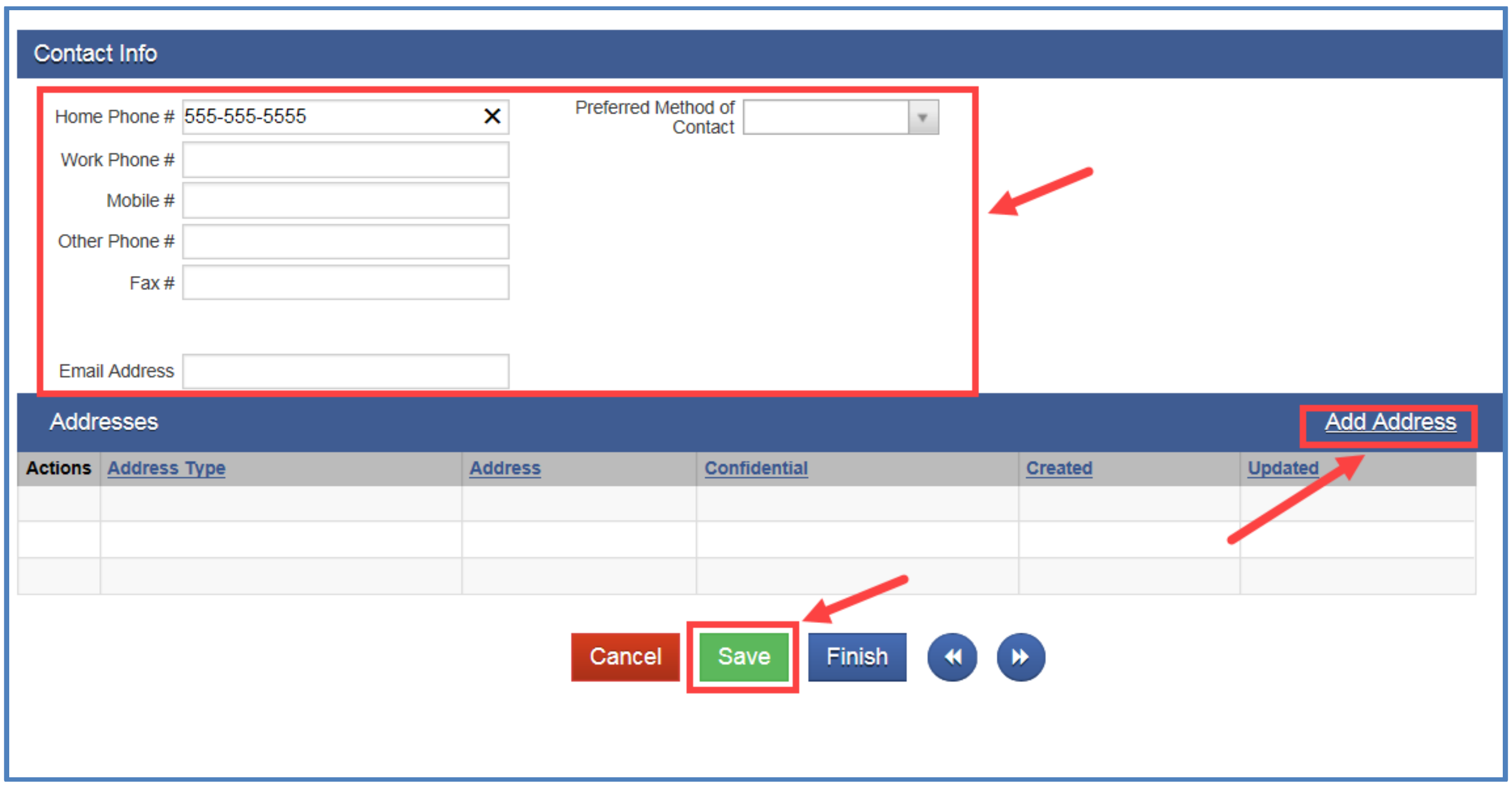
2. Click Save and click .

3. The Contact Info page will display. Click here for instructions on how to complete the Contact Info.

Contact Info

Do not delete the client's address. When a client's address changes, review the current address and change the Address Type to Previous Address.

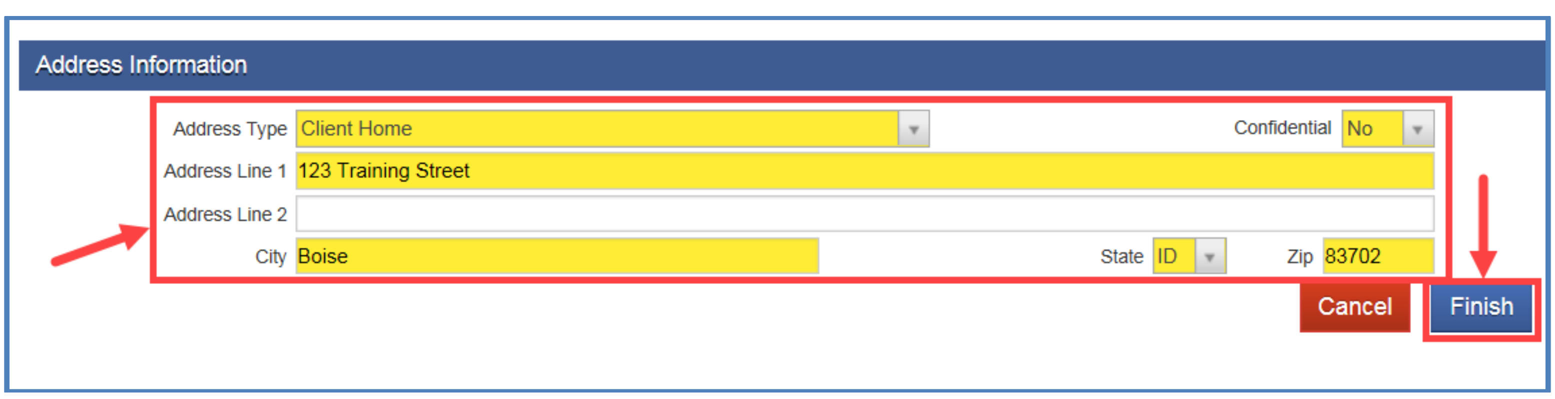
Enter all known contact information for the client.



1. Complete the following fields.
    - Phone # – enter at least one phone number.

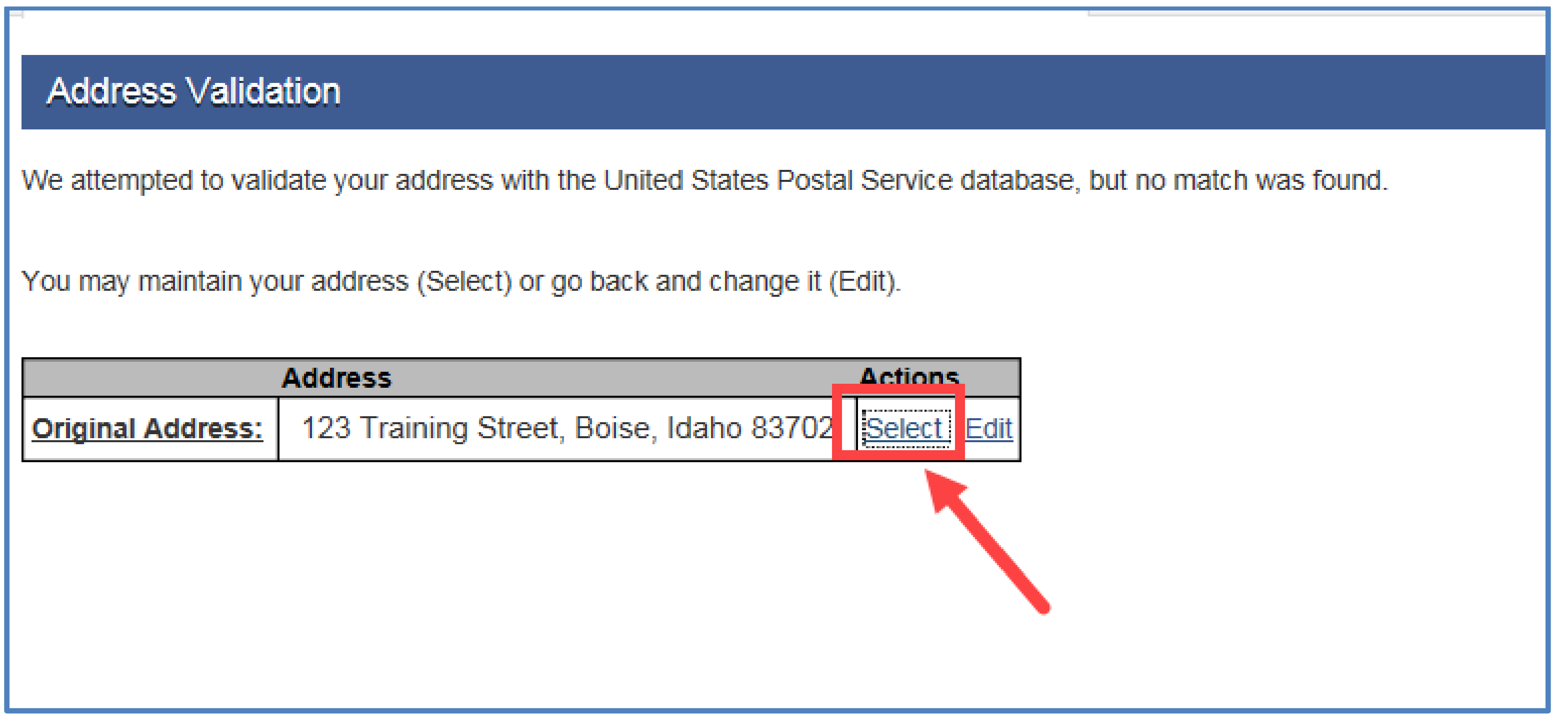
2. Click Save and click Add Address.

If the client is homeless, select address type “client unknown”, put “unknown” in the address line, and then fill in the city, state, and zip code.

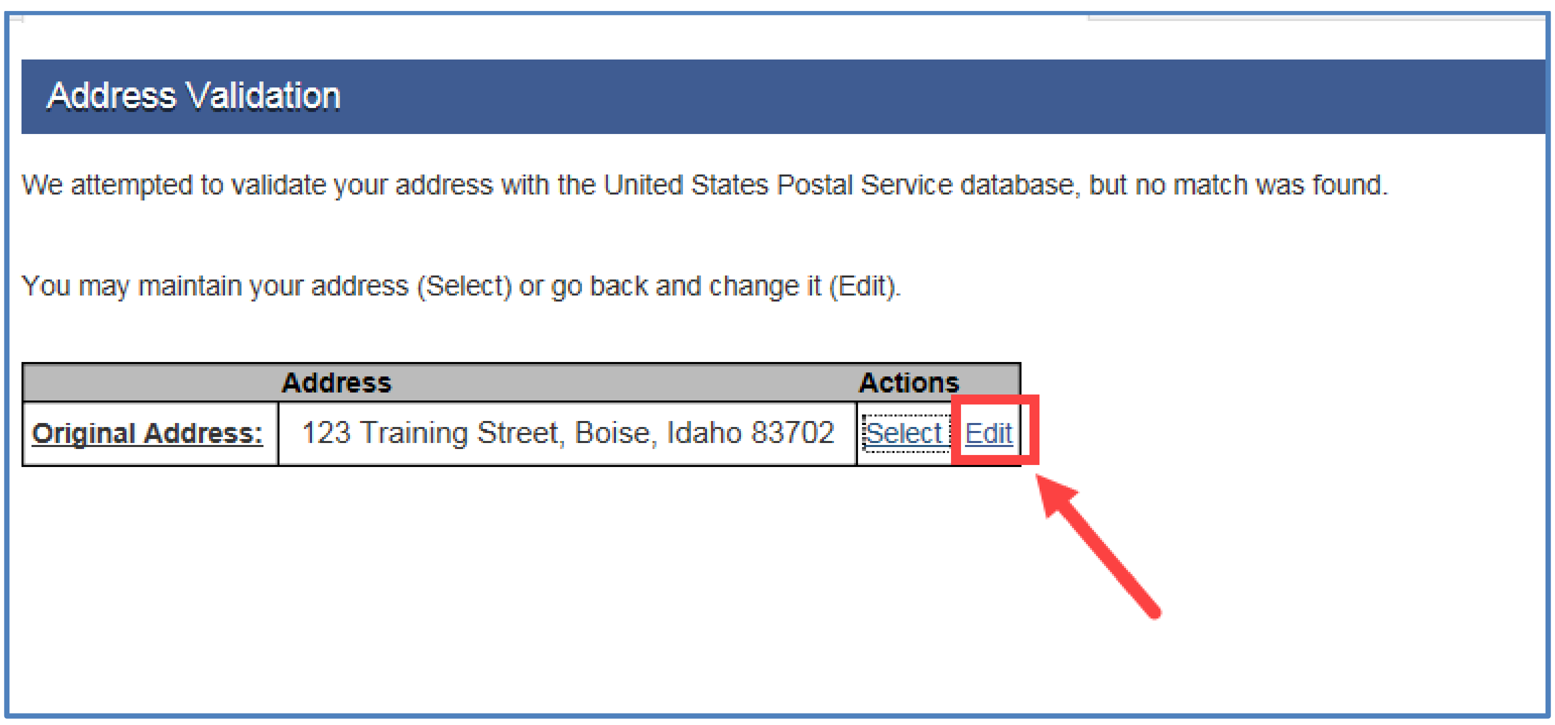


3. Complete the following fields.
    - Address Type – select client’s address type.
    - Confidential – select Yes or No.
    - Address Line 1 – enter client’s physical address.
    - Address Line 2 – enter additional physical address information.
    - City – enter client’s city.
    - State – the field will populate with ID.
    - Zip – enter client’s zip code.

4. Click Finish. WITS will check the address entered against the United States Postal Service database.



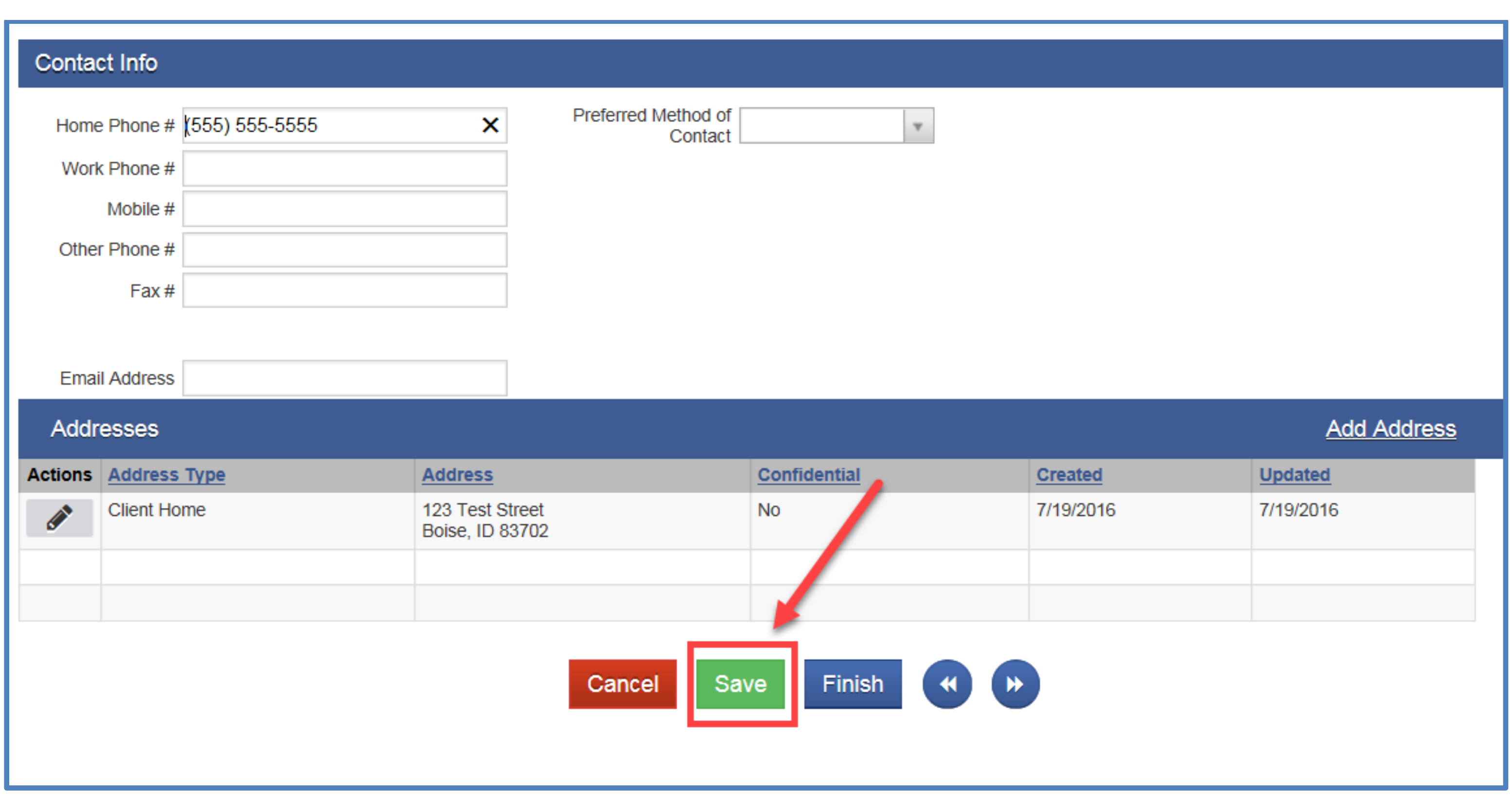
5. If the Address is located in the United States Postal Service database, then click Select next to the appropriate address.



6. When the Address is NOT located in the United States Postal Service database, click Select to select this address

OR

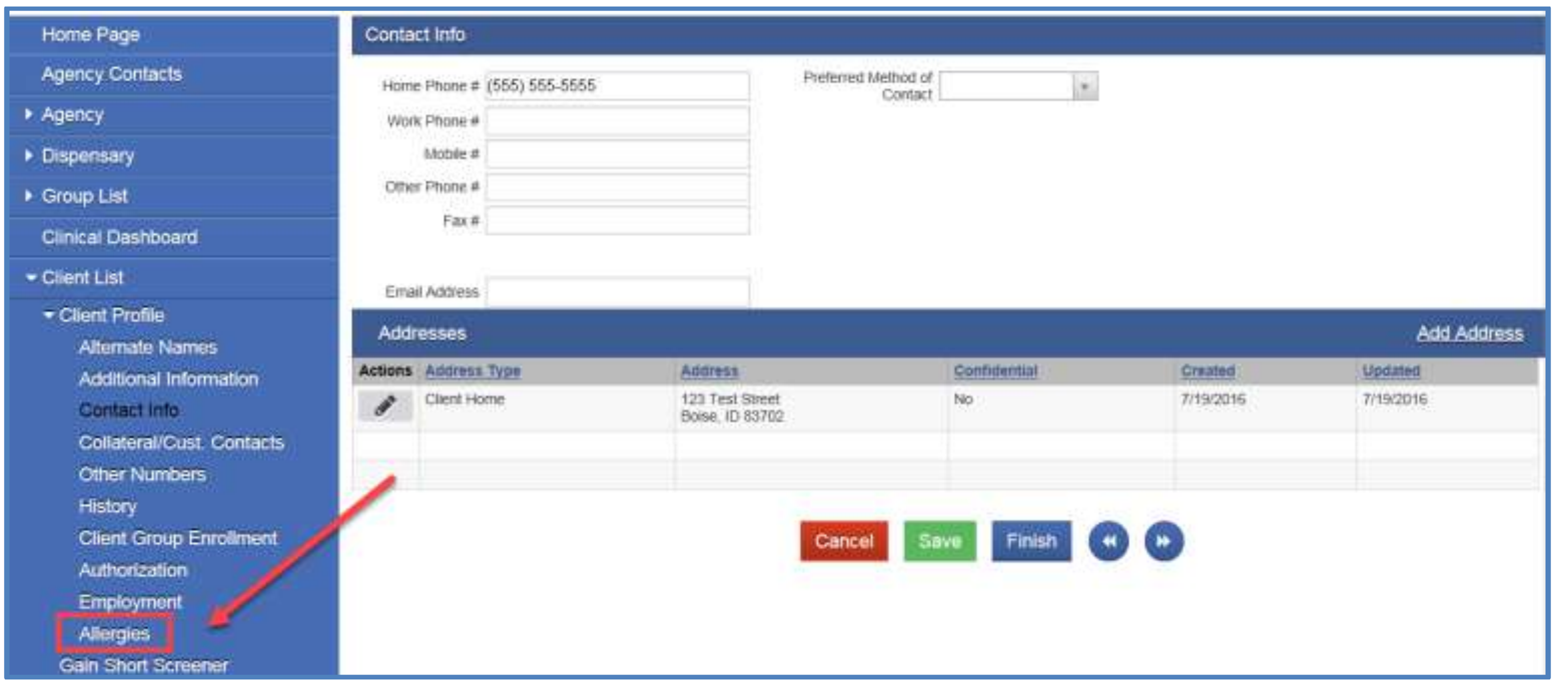
7. Click Edit to edit the address.



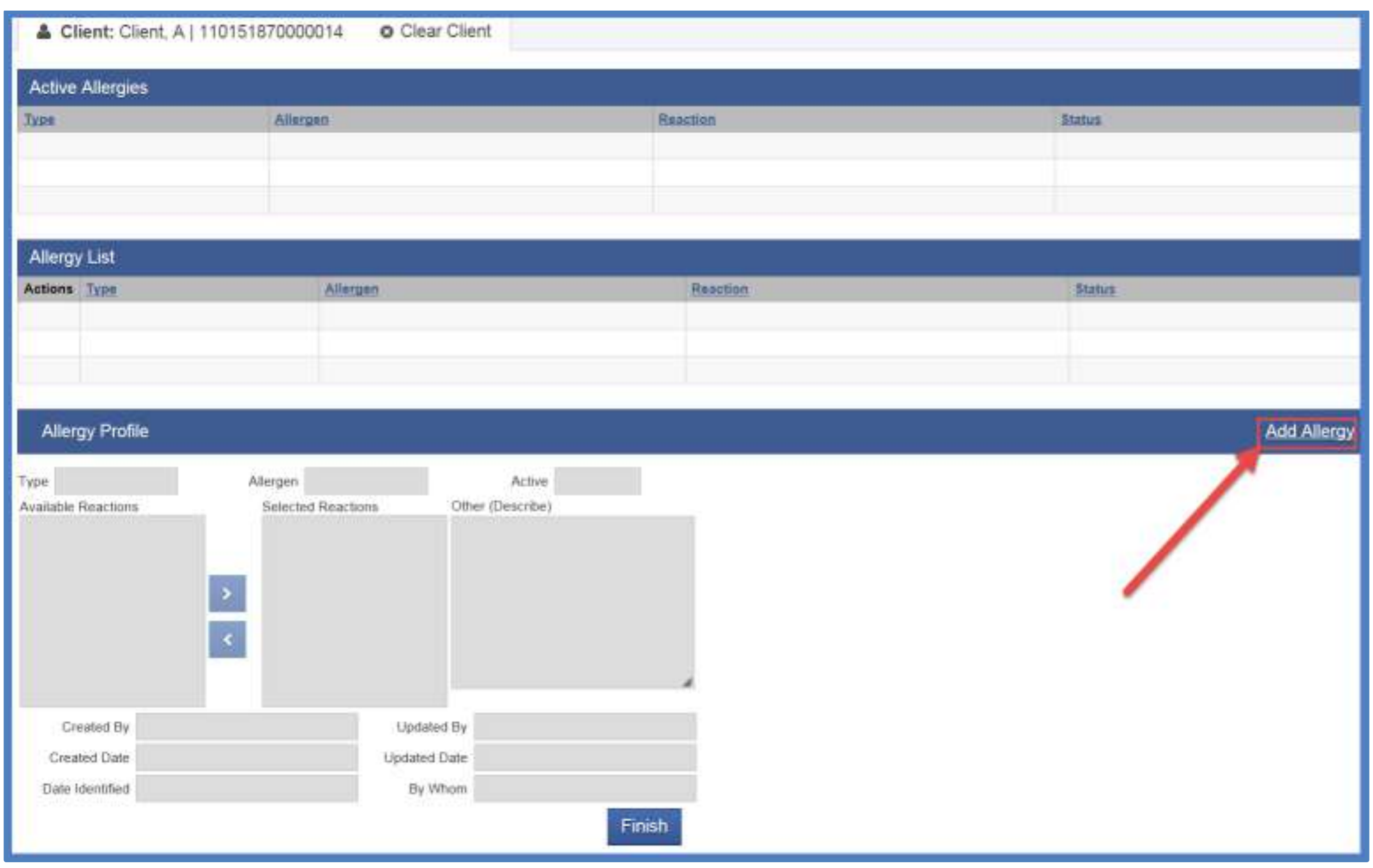
8. Click Save.

Allergies

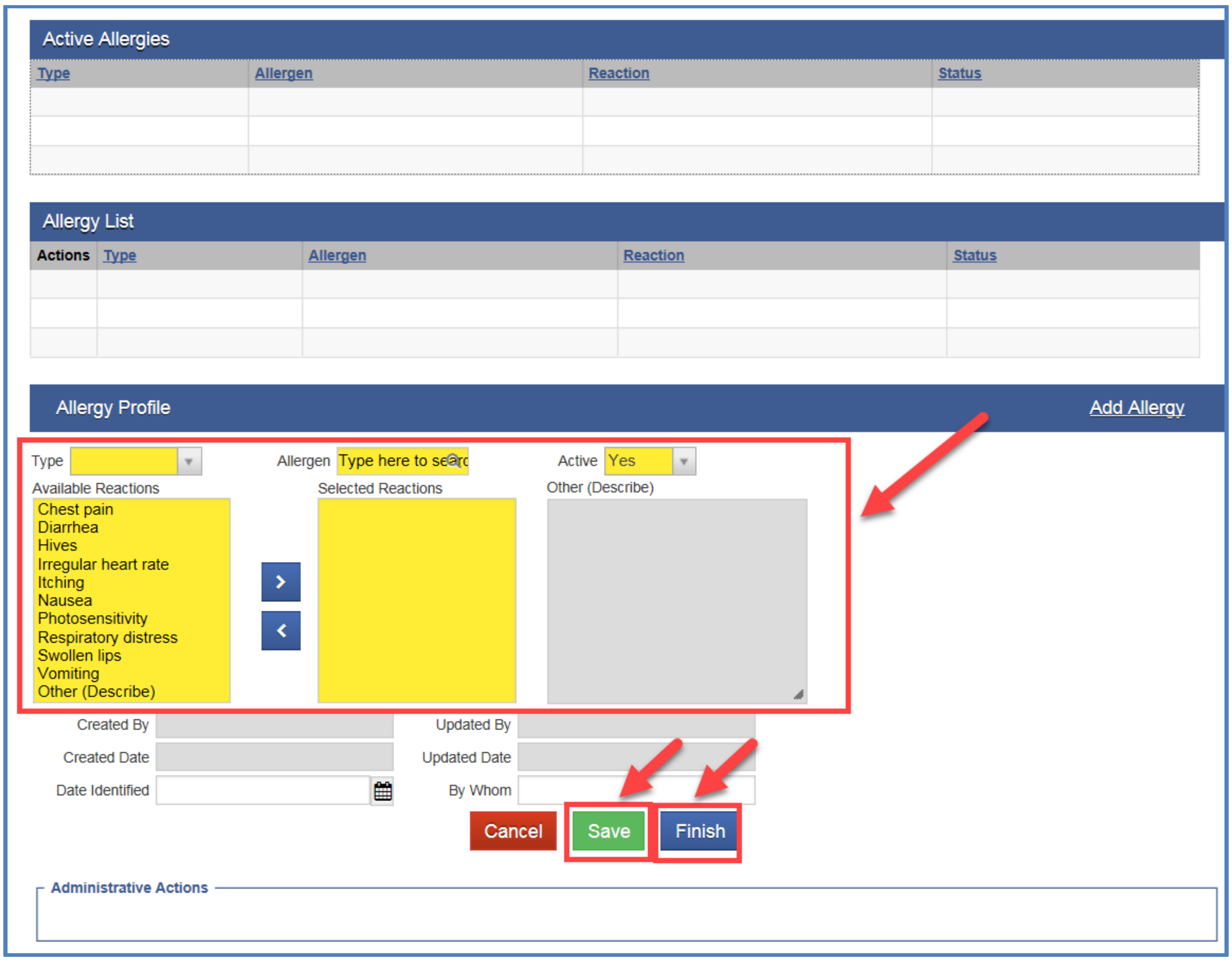
The Allergies screen tracks the client’s allergies during an episode of care. The Active Allergy list displays only the active allergies. The Allergy List displays active and inactive allergies.



1. Click Allergies on the blue navigation pane.



2. Click. Add Allergy.



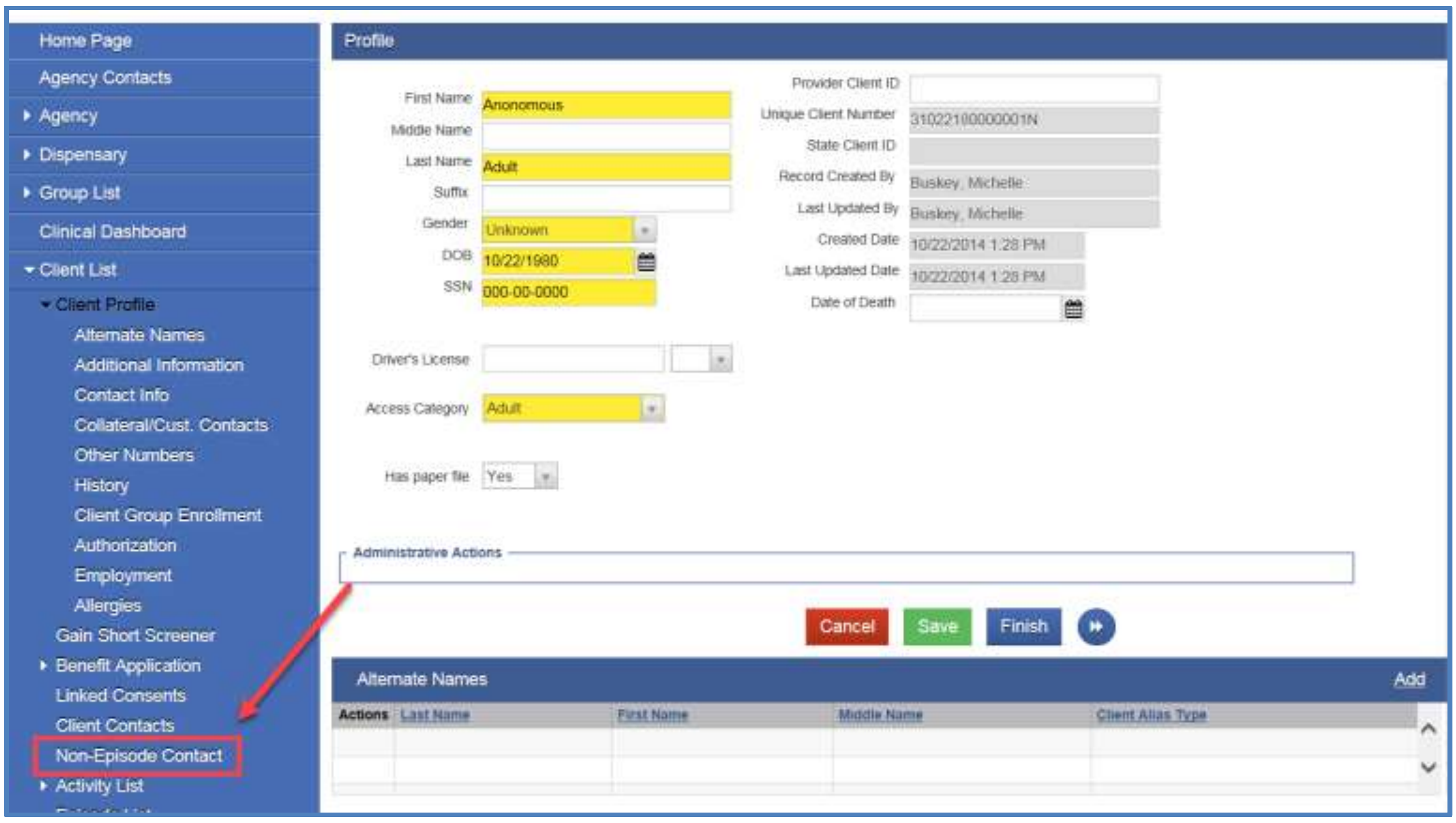
3. Complete the following fields.
   - Type – select the type of allergy.
   - Allergen – select the allergen.
   - Active – the field will populate with Yes. Update as needed.
   - Available Reactions – select all applicable reactions and move to Selected Reactions.
4. Click Save and click Finish.
5. Create a Non-Episode Contact

Creating a Non-Episode Contact

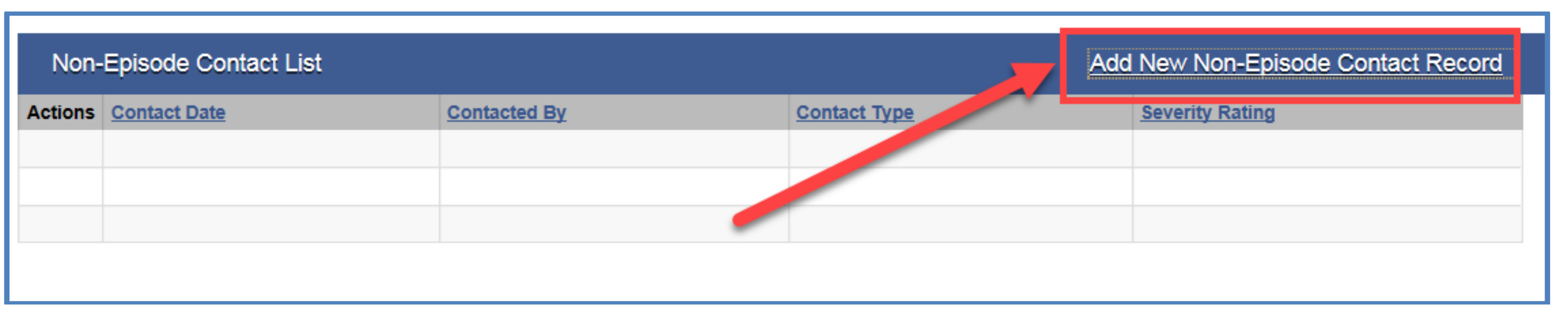
When there is not enough information to create a Client Profile (client's first name, last name, birthdate and SSN), always enter a non-Episode contact note in the Anonymous Adult client record.

When a client contacts the BHCCC and the client is not physically at the BHCCC, create a non-episode contact note to document the activity.

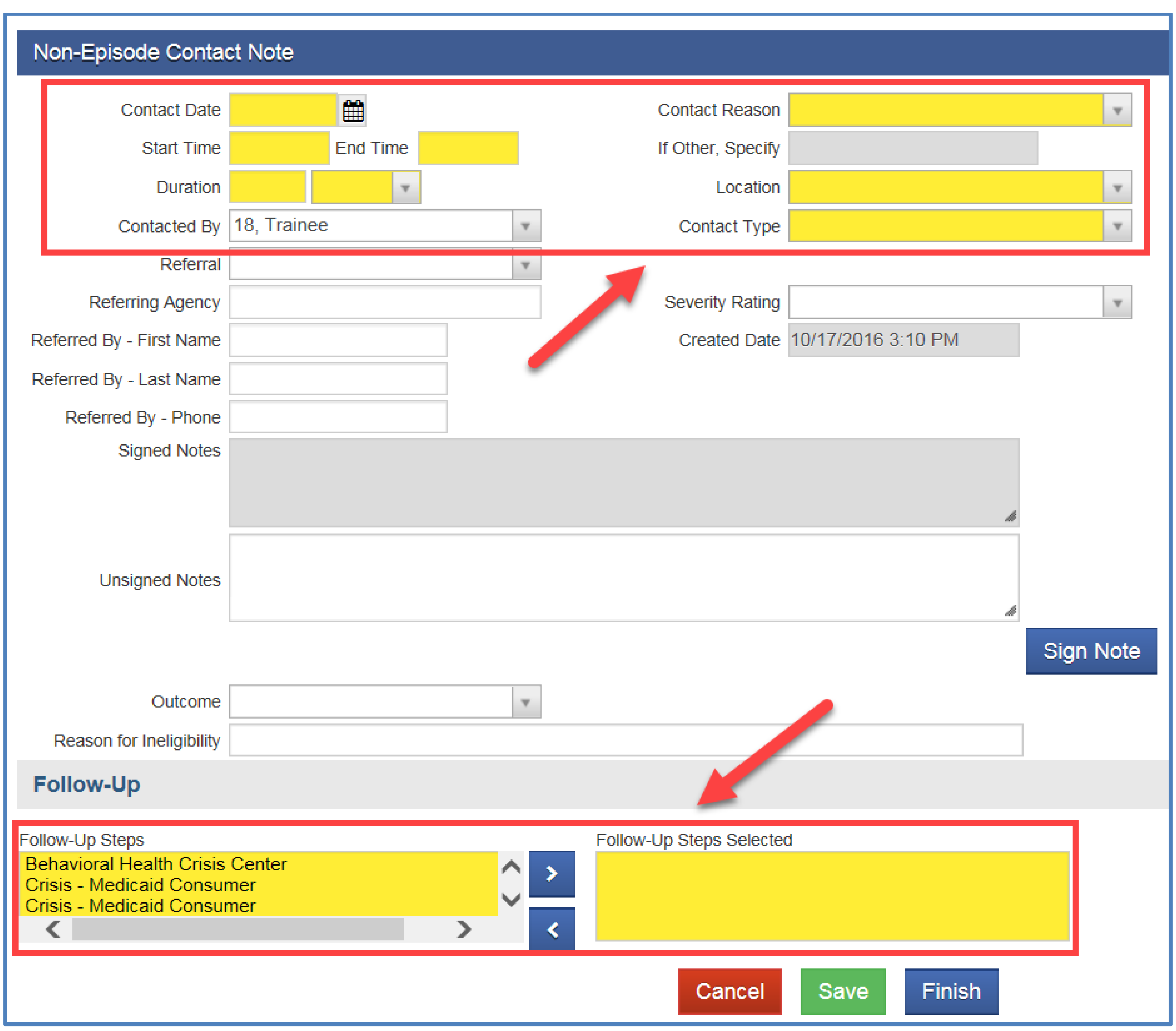
1. Begin on the Client Profile.



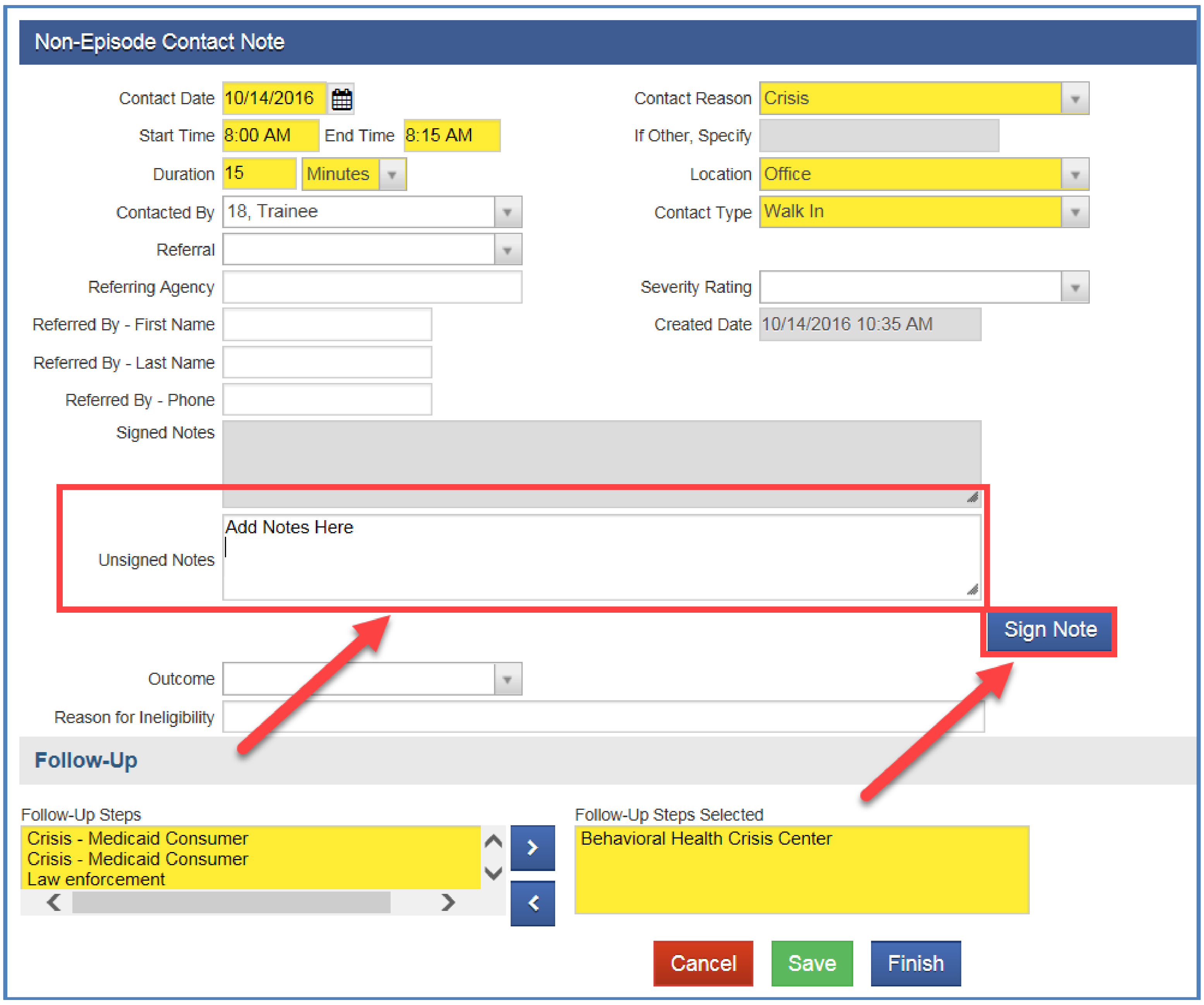
2. Once you're on the Client Profile, click Non-Episode Contact on the blue navigation pane.



3. Click Add New Non-Episode Contact Record.

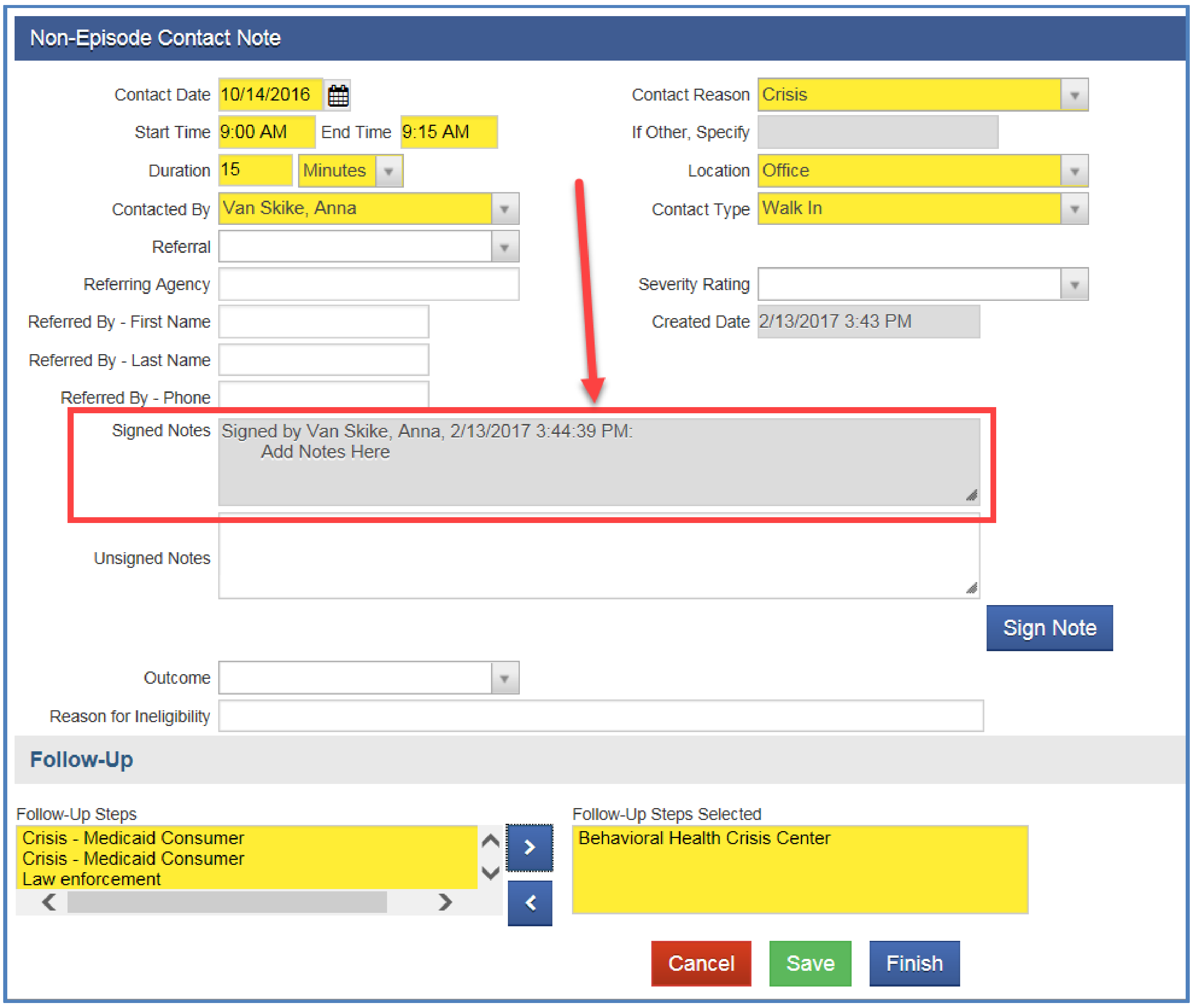


4. Complete the following fields.
    - Contact Date – enter date.
    - Start Time– enter the start time as HH:MM.
    - End Time– enter the end time as HH:MM.
    - Duration – the field will populate with the duration based on the start and end time.
    - Contacted By – the field will populate with the name of the person creating the non-episode contact. Update as needed.
    - Contact Reason – select contact reason.
    - Location – select location of the client.
    - Contact Type – select contact type.
    - Follow-Up Steps – select all applicable follow-up step(s) and move to Follow-Up Steps Selected.

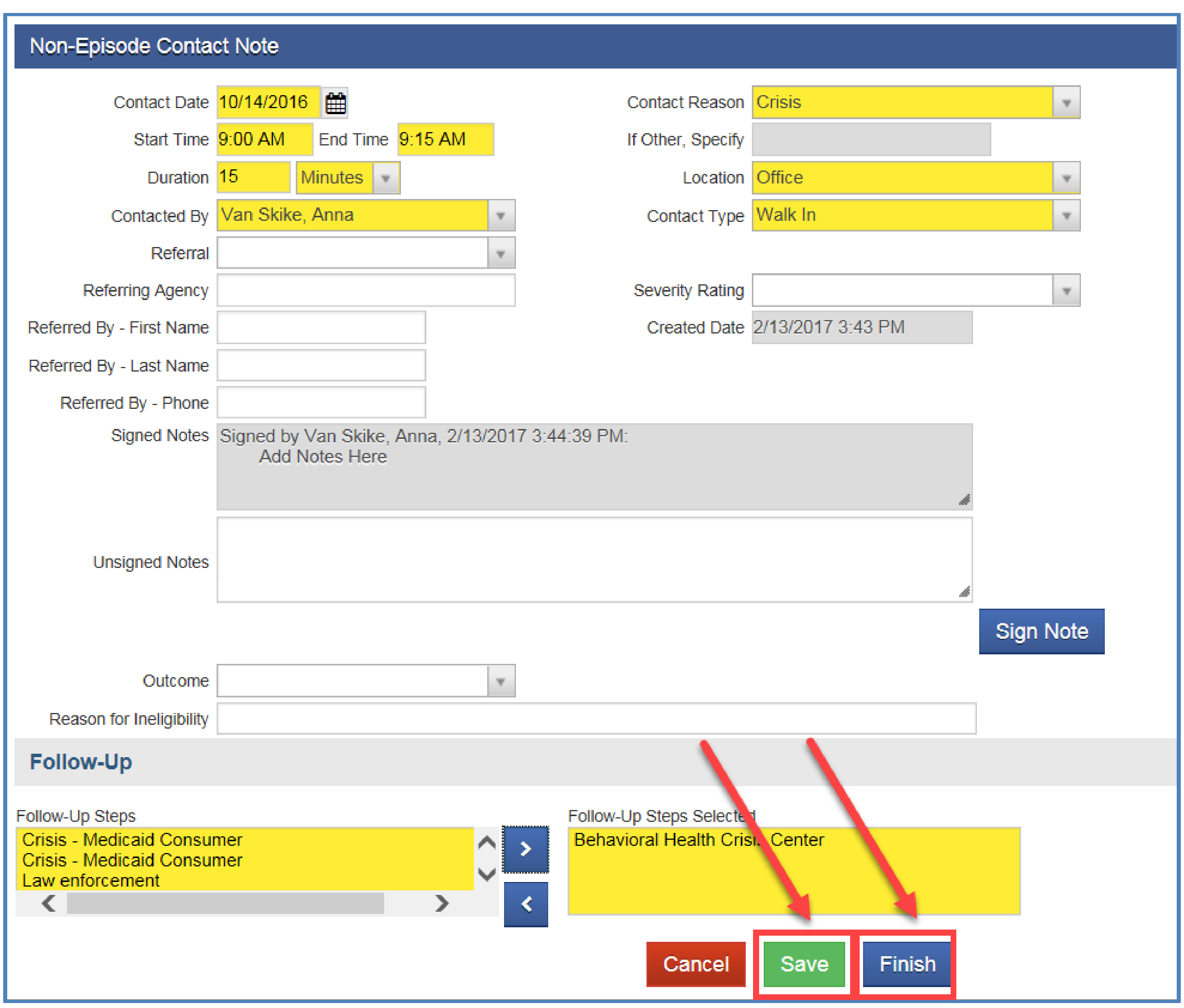


5. Enter notes in the Unsigned Note section.

6. When the notes are complete, click .



7. The Signed Note becomes Read Only and an electronic signature and time stamp is created in the Signed Notes section.



8. Click Save and Finish.

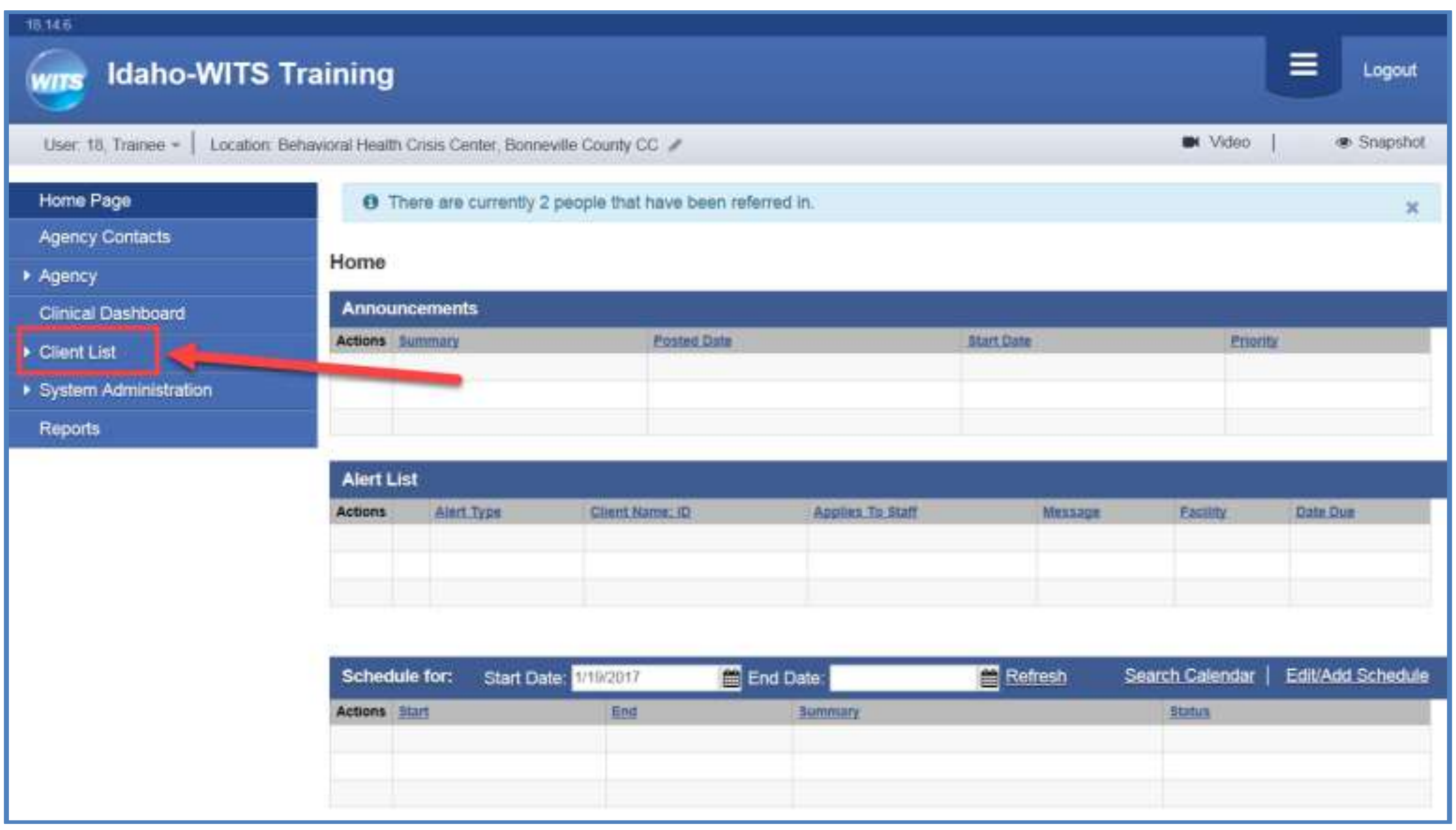
When a client is not willing to give their name and other identifying information, always document the contact under the client Anonymous Adult. *Do not create a new client profile.*

If the client is not willing to give their name and other identifying information:

1. Search and select the Anonymous Adult client in WITS.

How to search WITS to and select the Anonymous Adult client

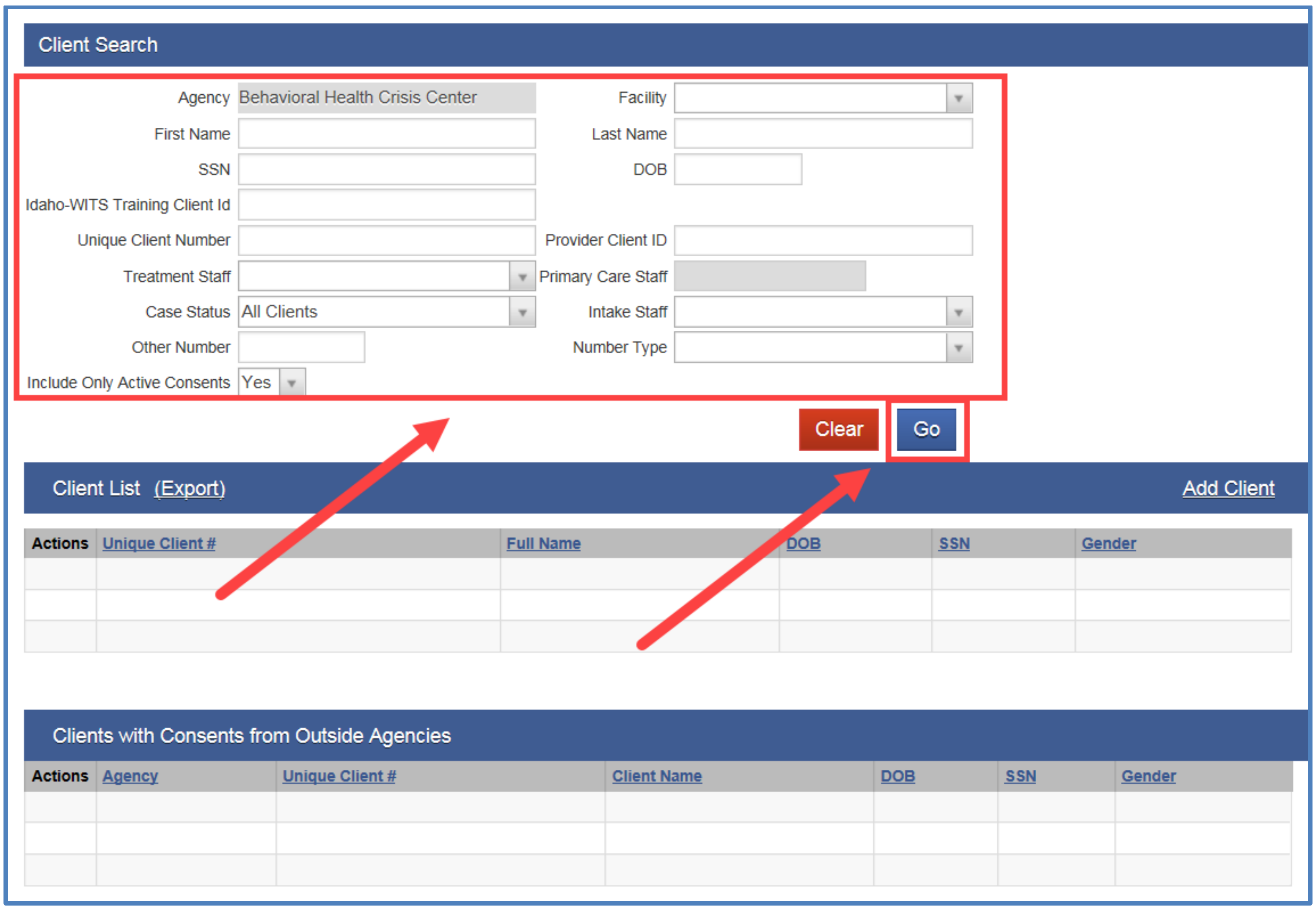
1. Begin on the Home Page.



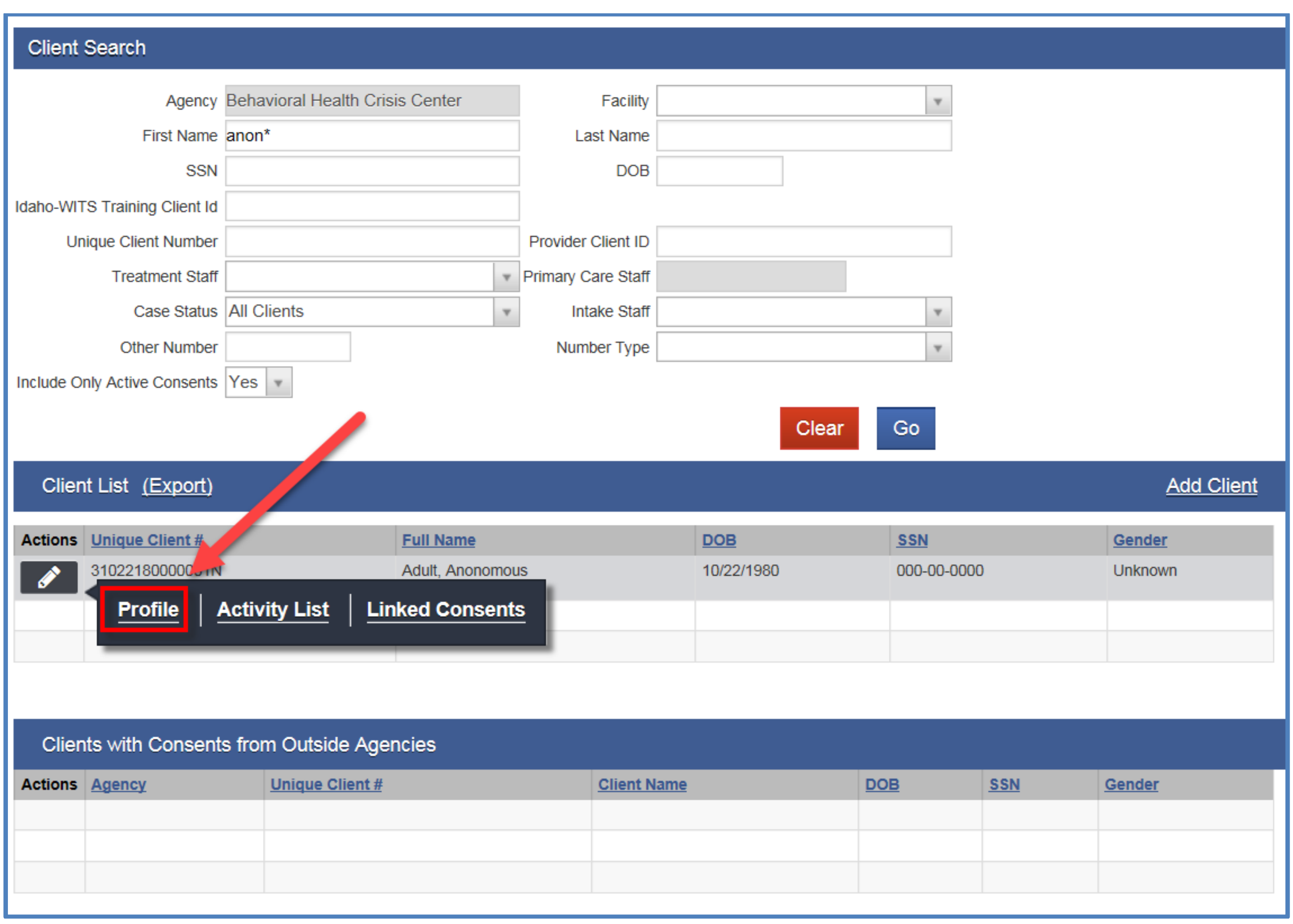
2. Click Client List on the blue navigation pane.

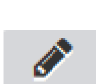
Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

To view only Active Clients, select a Case Status of Clients with Open Cases.



3. Enter search criteria on the Client Search page and click Go.



4. Hover over the  and click Profile.

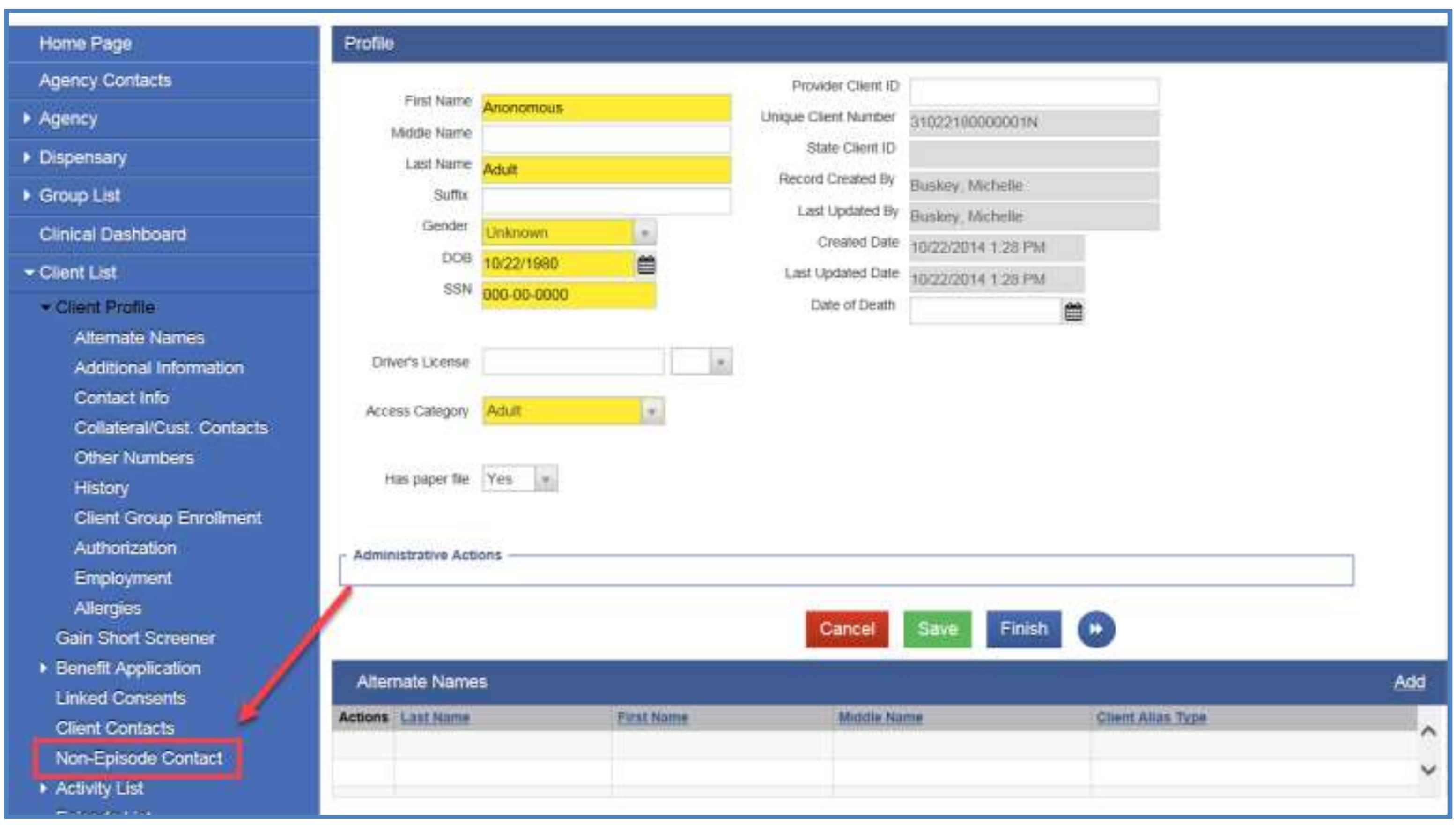
5. Create a Non-Episode Contact

Creating a Non-Episode Contact

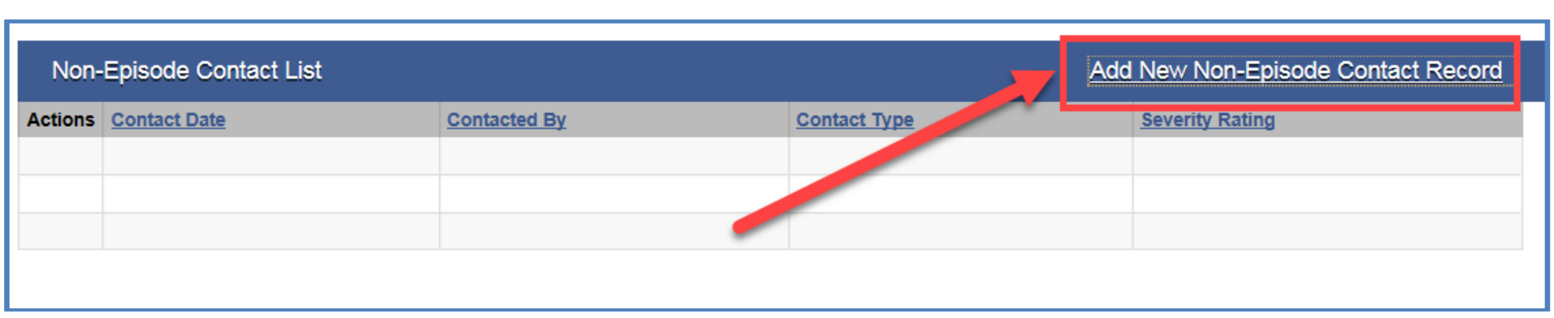
When there is not enough information to create a Client Profile (client's first name, last name, birthdate and SSN), always enter a non-Episode contact note in the Anonymous Adult client record.

When a client contacts the BHCCC and the client is not physically at the BHCCC, create a non-episode contact note to document the activity.

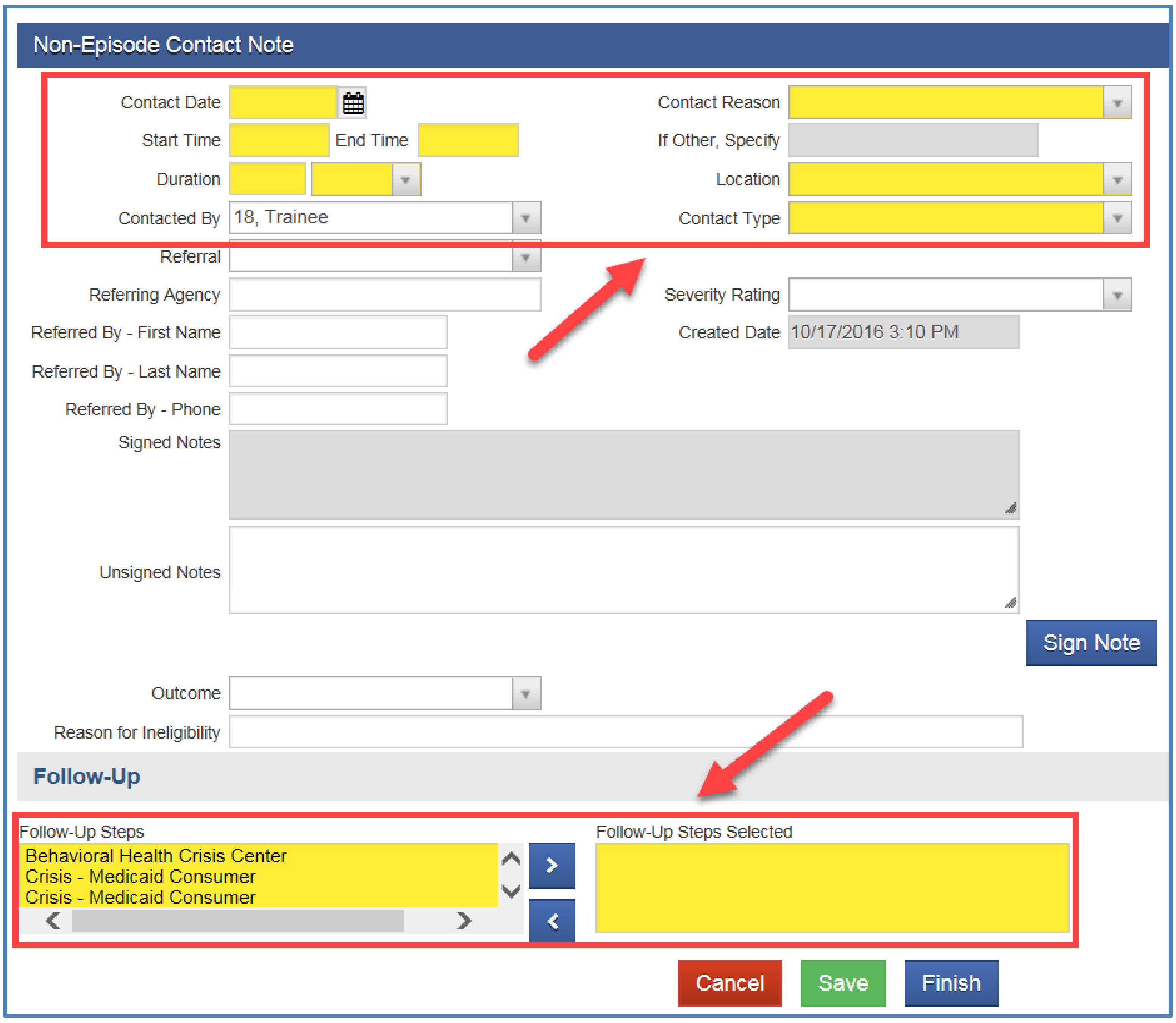
1. Begin on the Client Profile.



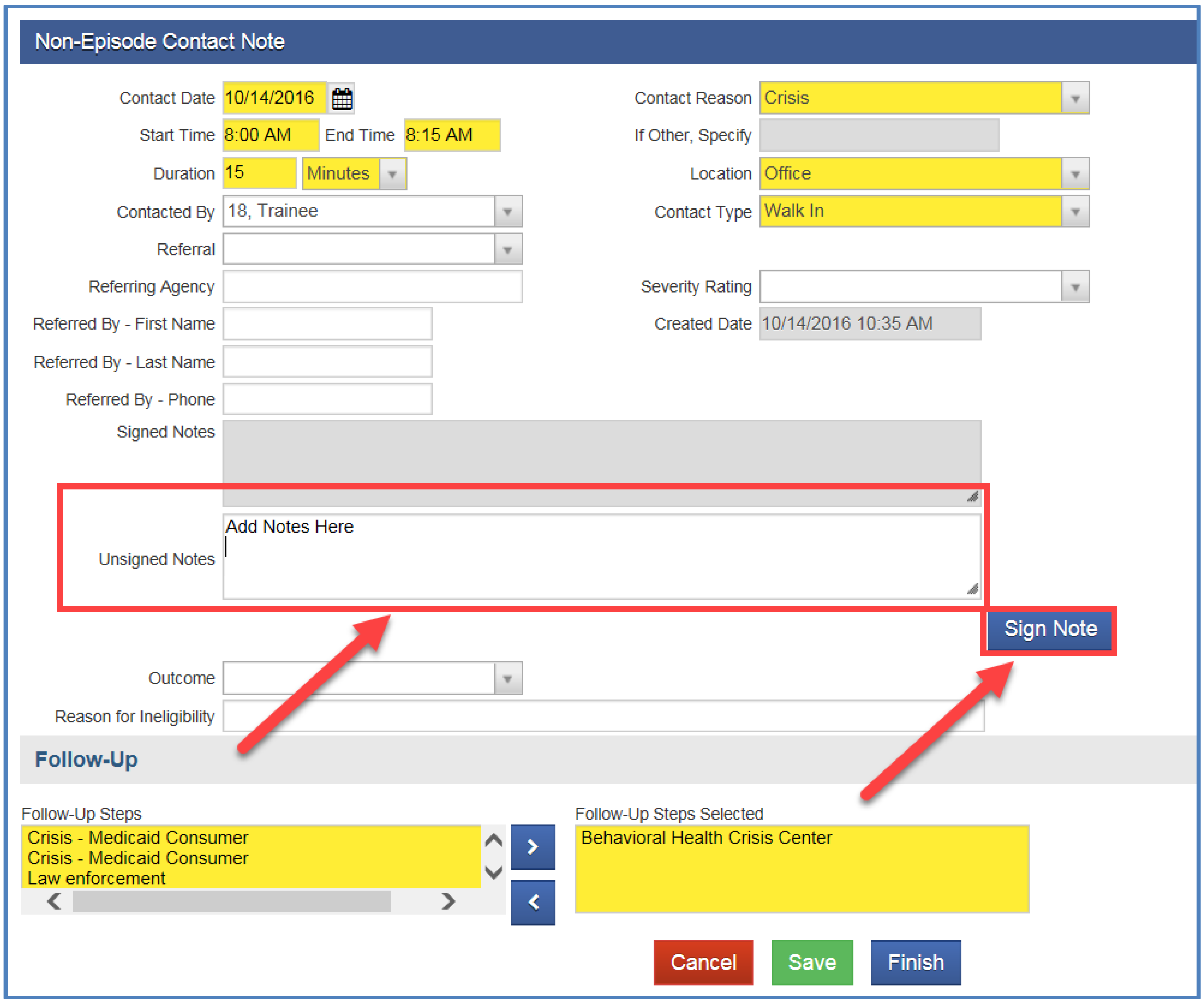
2. Once you're on the Client Profile, click Non-Episode Contact on the blue navigation pane.



3. Click Add New Non-Episode Contact Record.

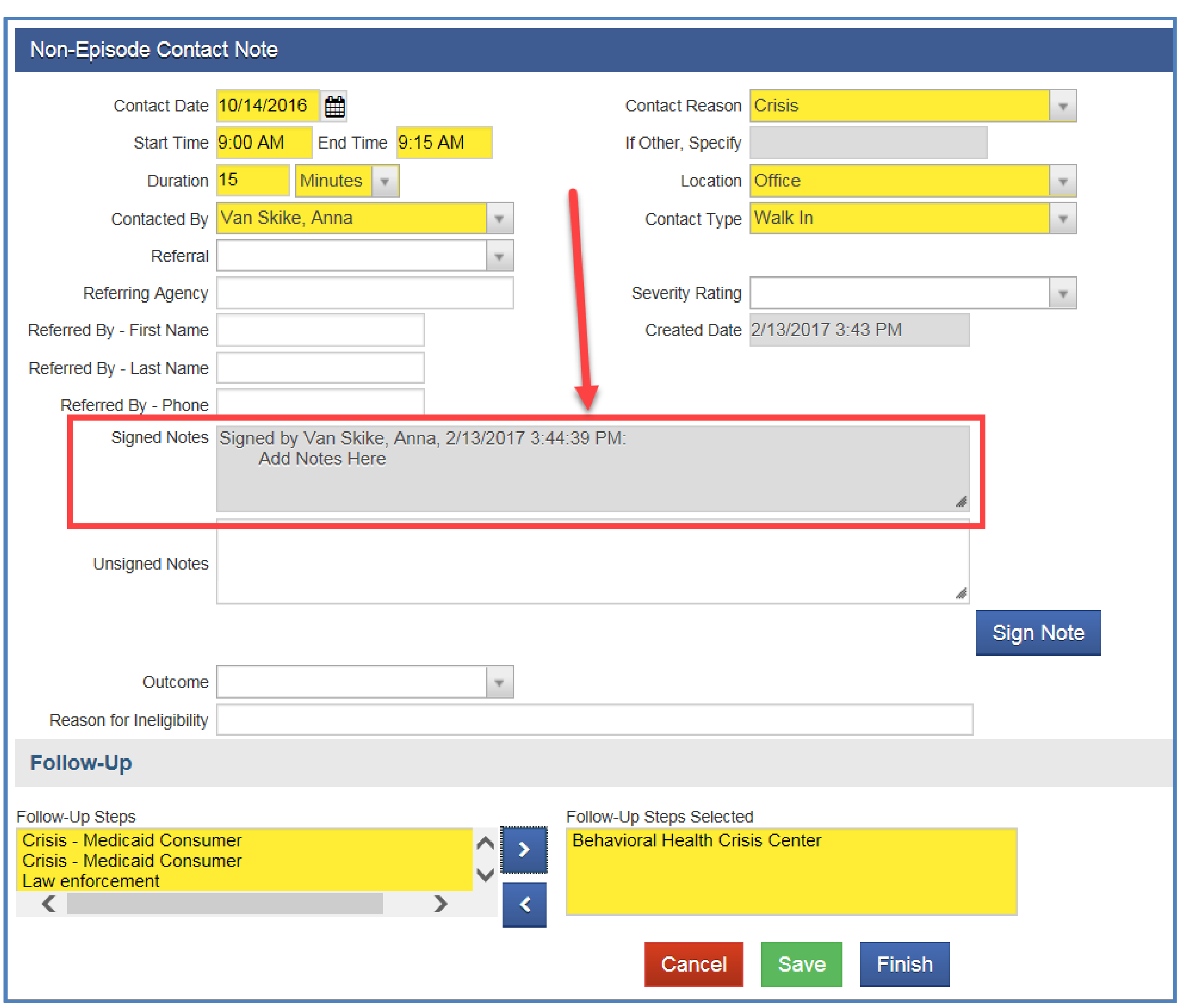


4. Complete the following fields.
   - Contact Date – enter date.
   - Start Time– enter the start time as HH:MM.
   - End Time– enter the end time as HH:MM.
   - Duration – the field will populate with the duration based on the start and end time.
   - Contacted By – the field will populate with the name of the person creating the non-episode contact. Update as needed.
   - Contact Reason – select contact reason.
   - Location – select location of the client.
   - Contact Type – select contact type.
   - Follow-Up Steps – select all applicable follow-up step(s) and move to Follow-Up Steps Selected.

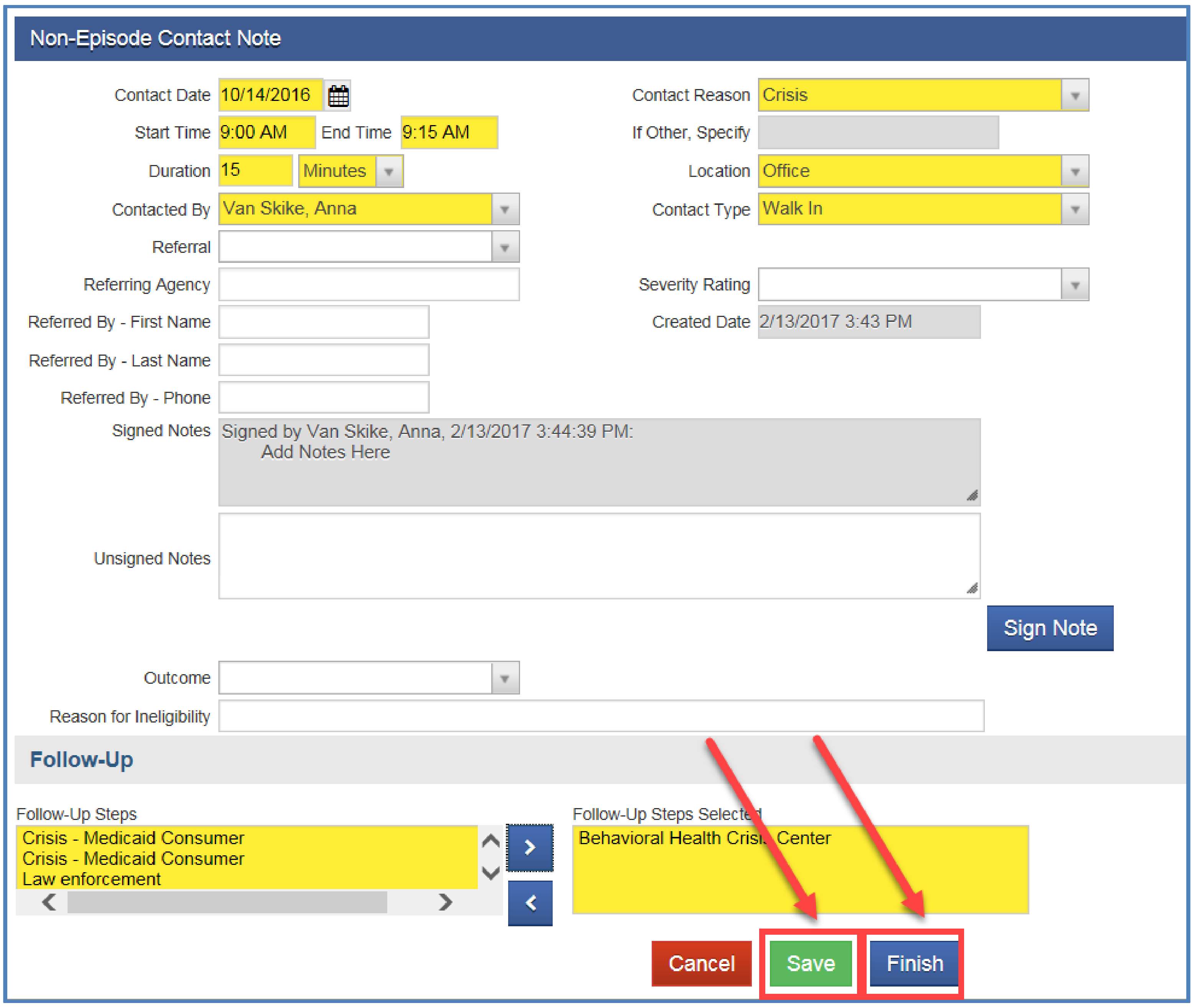


5. Enter notes in the Unsigned Note section.

6. When the notes are complete, click .



7. The Signed Note becomes Read Only and an electronic signature and time stamp is created in the Signed Notes section.

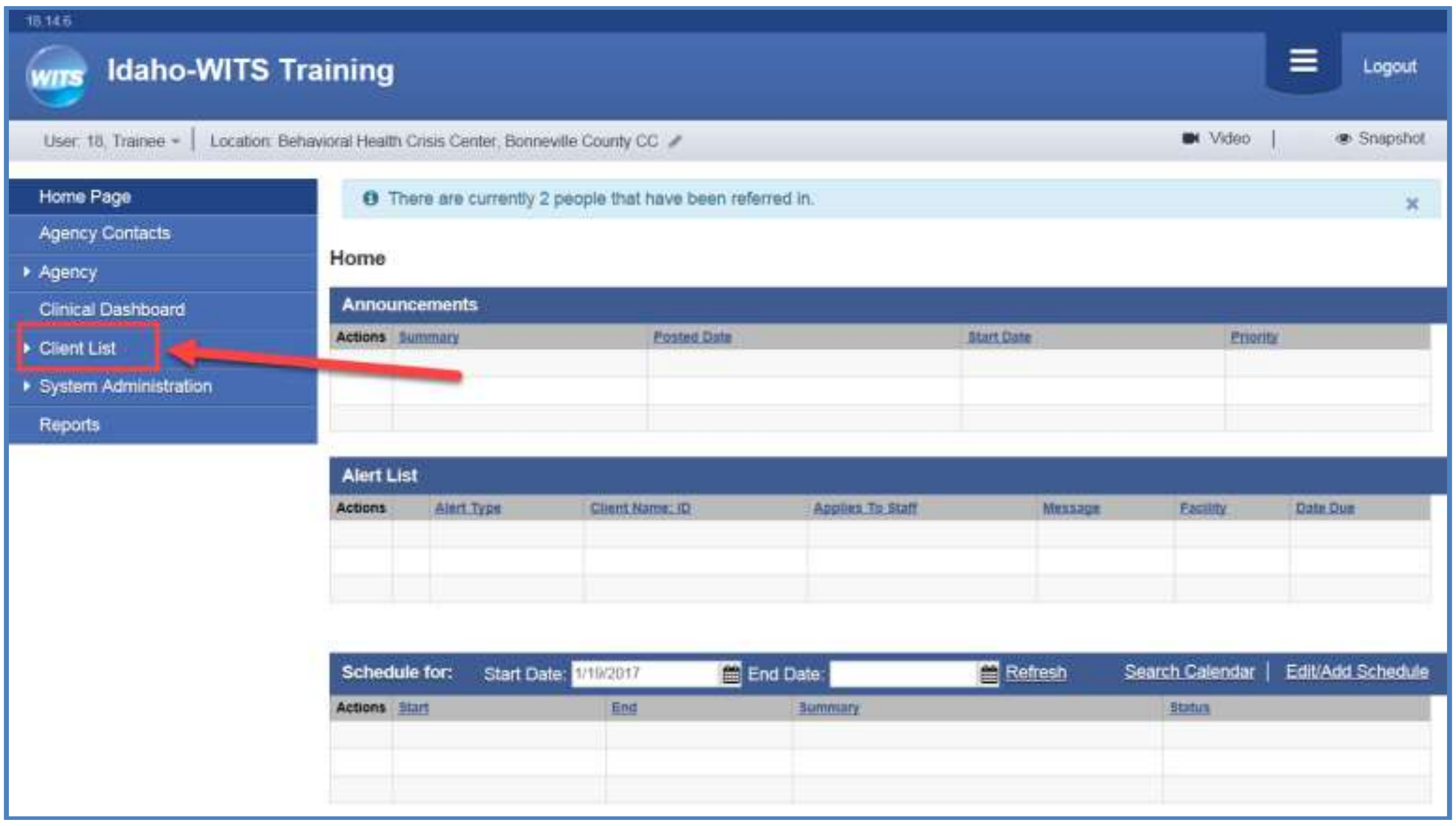


8. Click  and .

Searching for Clients and Navigating within a Client Record

How to Search for a Client and view the Activity List

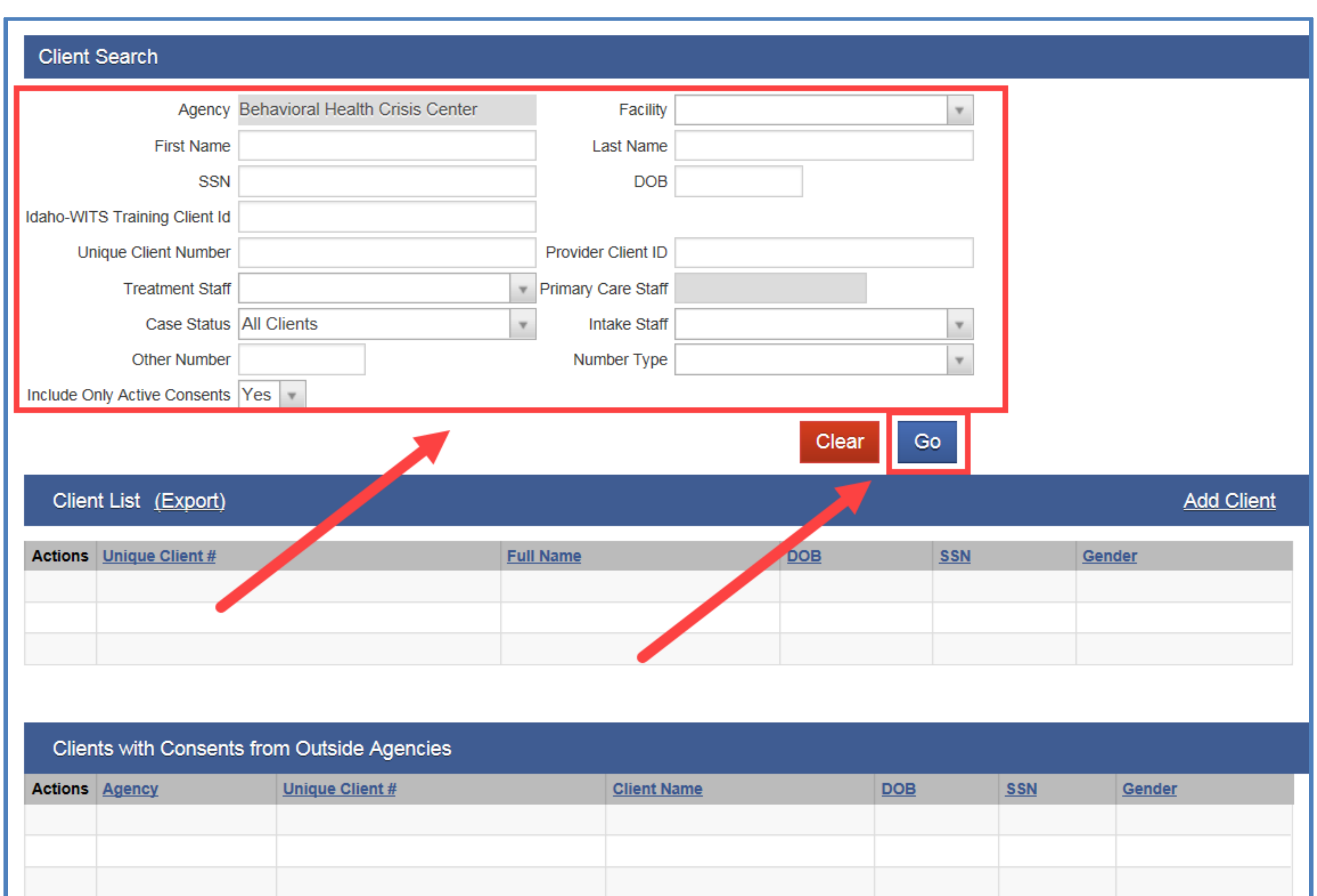
1. Begin on the Home Page.



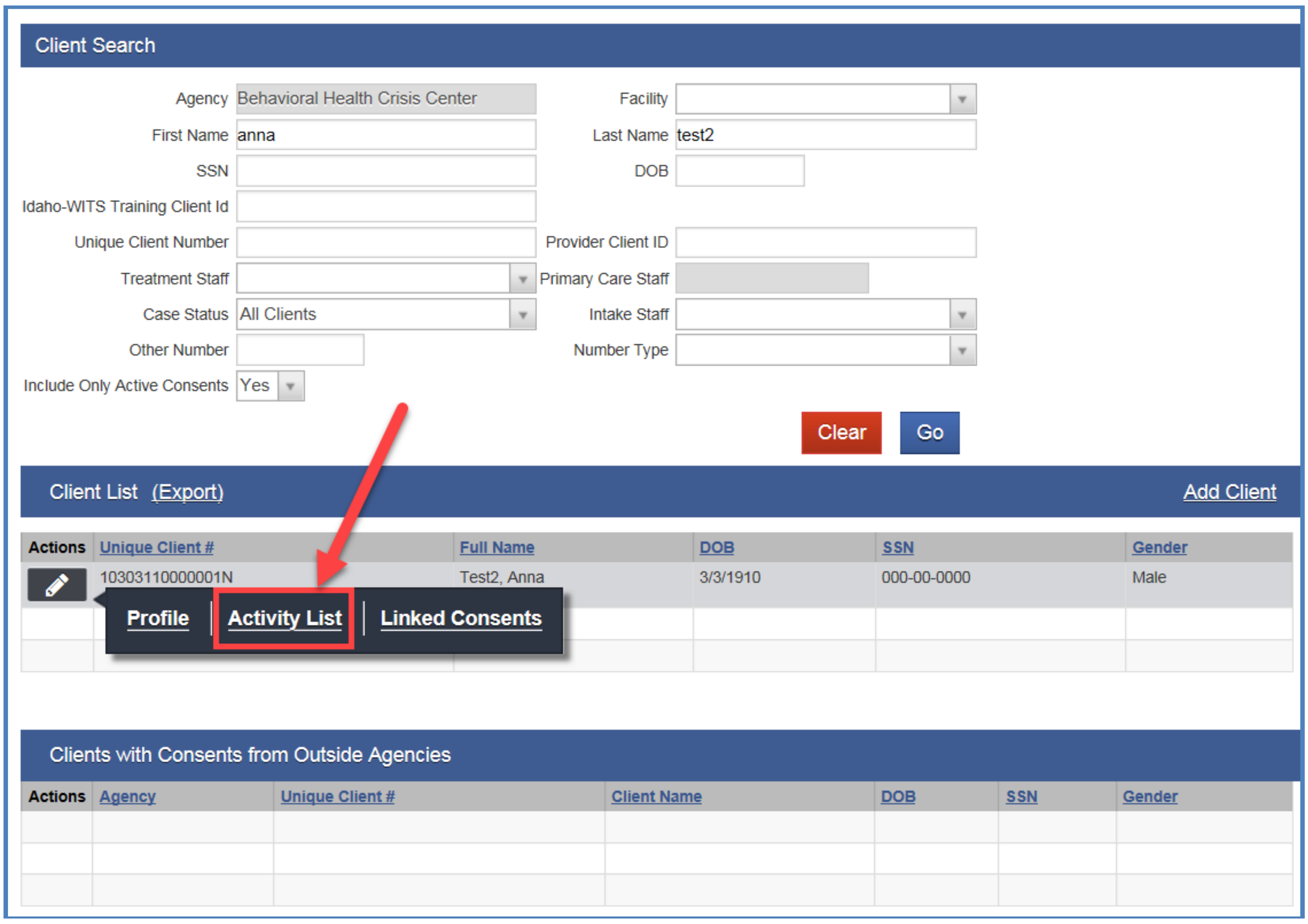
2. Click ▸ Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

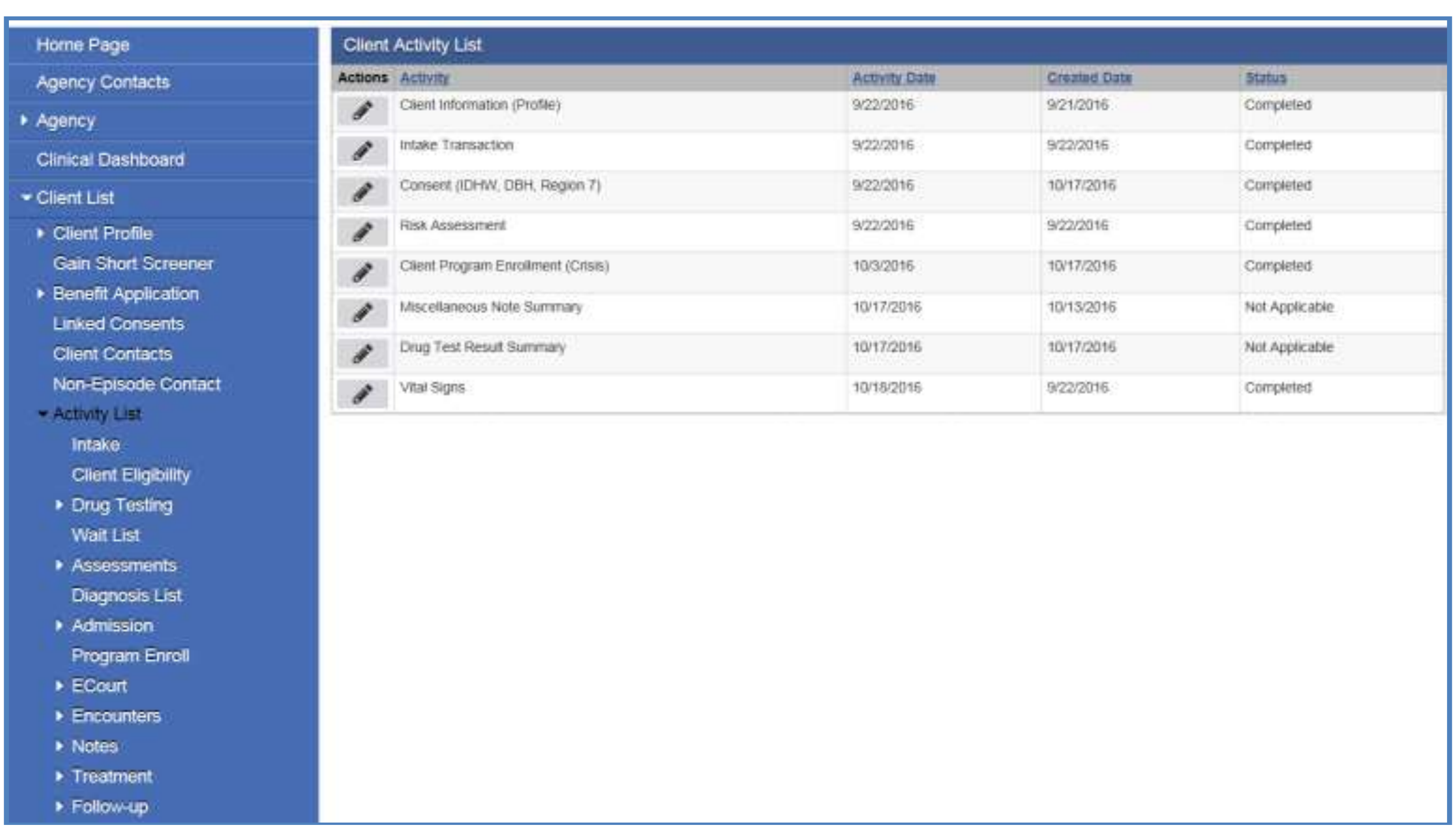
To view only Active Clients, select a Case Status of Clients with Open Cases.



3. Enter search criteria on the Client Search page and click Go.



4. Your search results will display in the Client List section. Hover over the and click **Activity List** to review the client activities for the current open case.

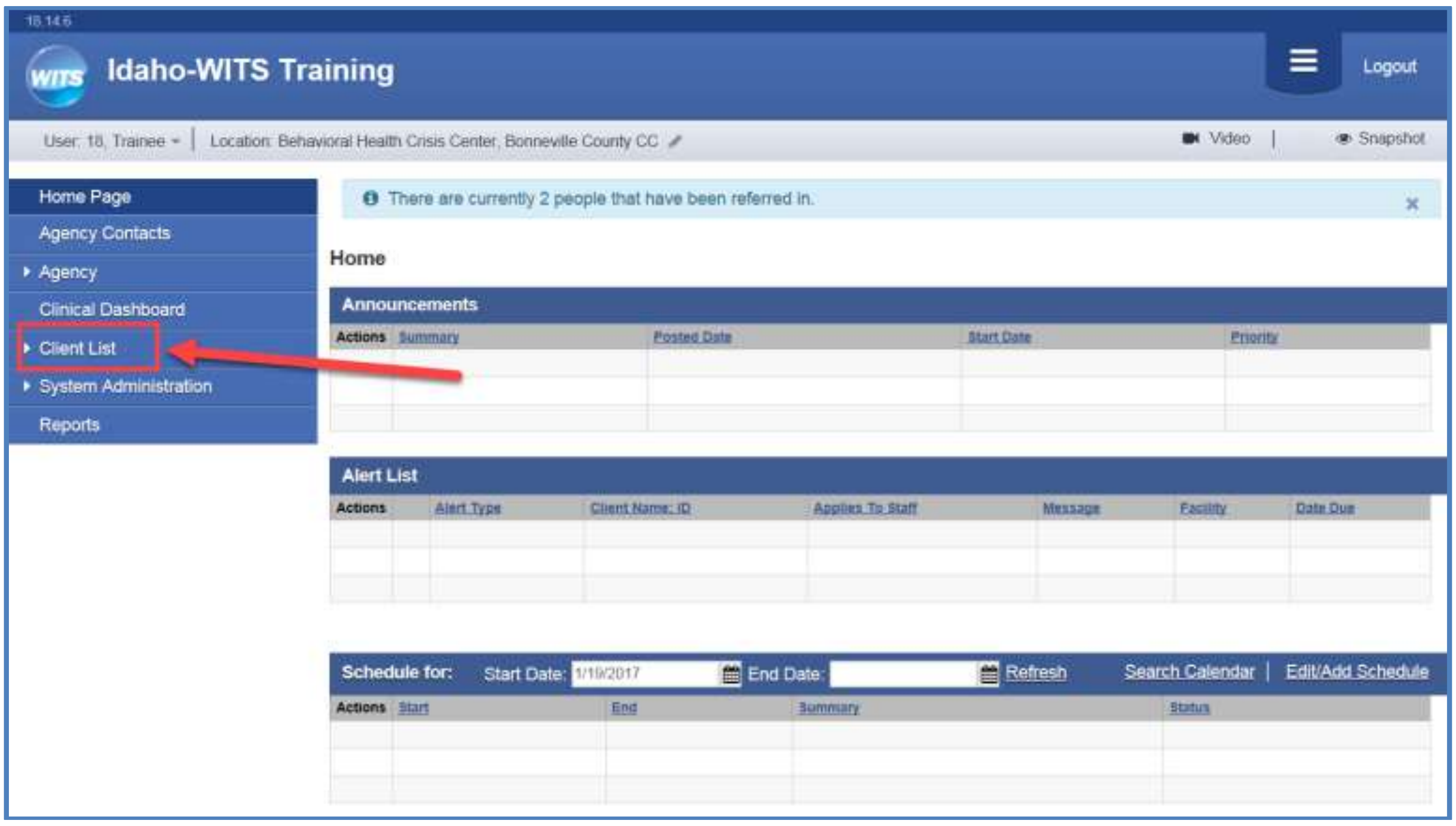


5. The Client's Activity List displays. Depending on the activities already completed for this client, you may have different items listed on your Activity List.

6. Hover over the and click **Review** under Actions to review any of the individual client activities.

How to Search for a Client and View the Client Profile

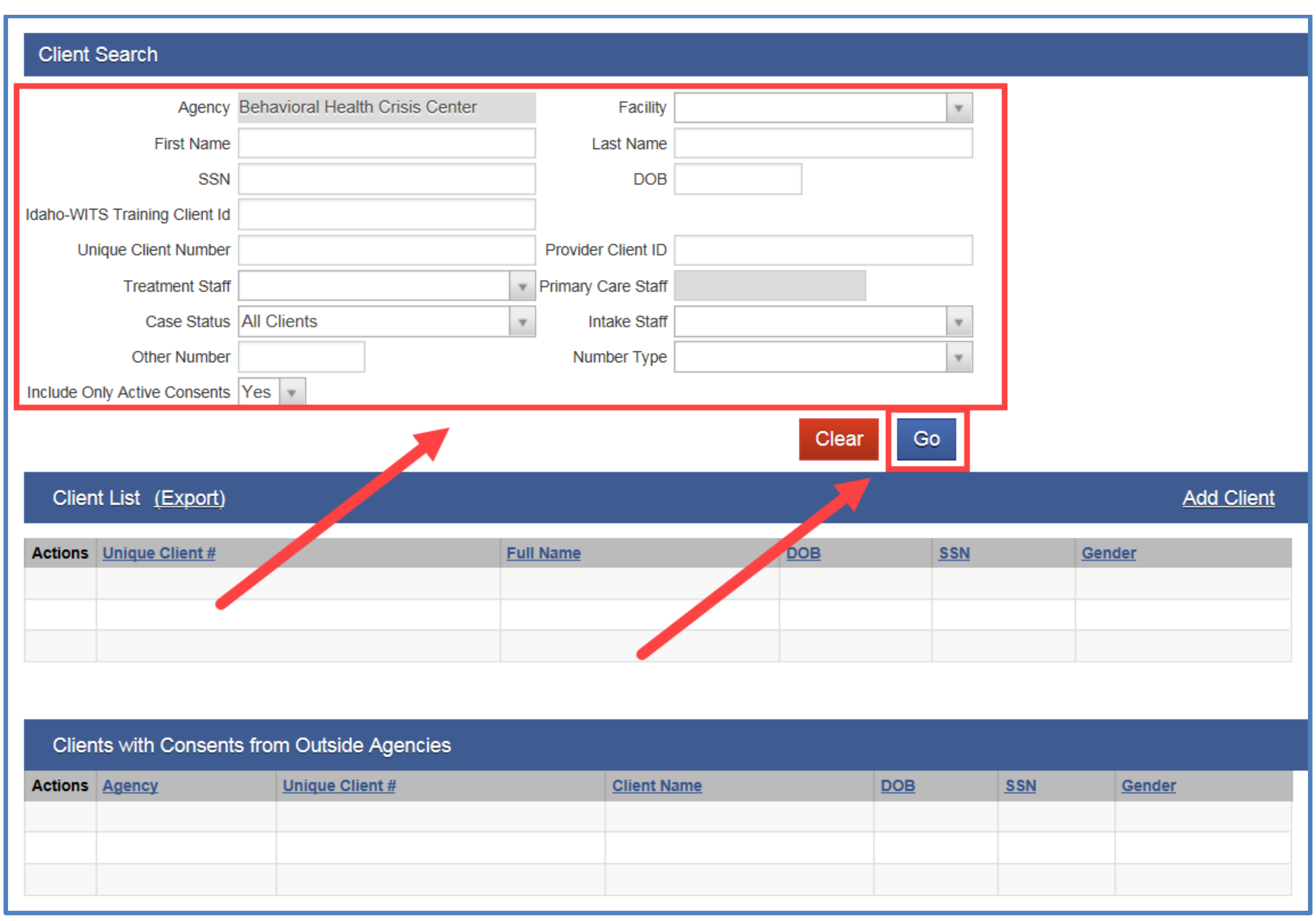
1. Begin on the Home Page.



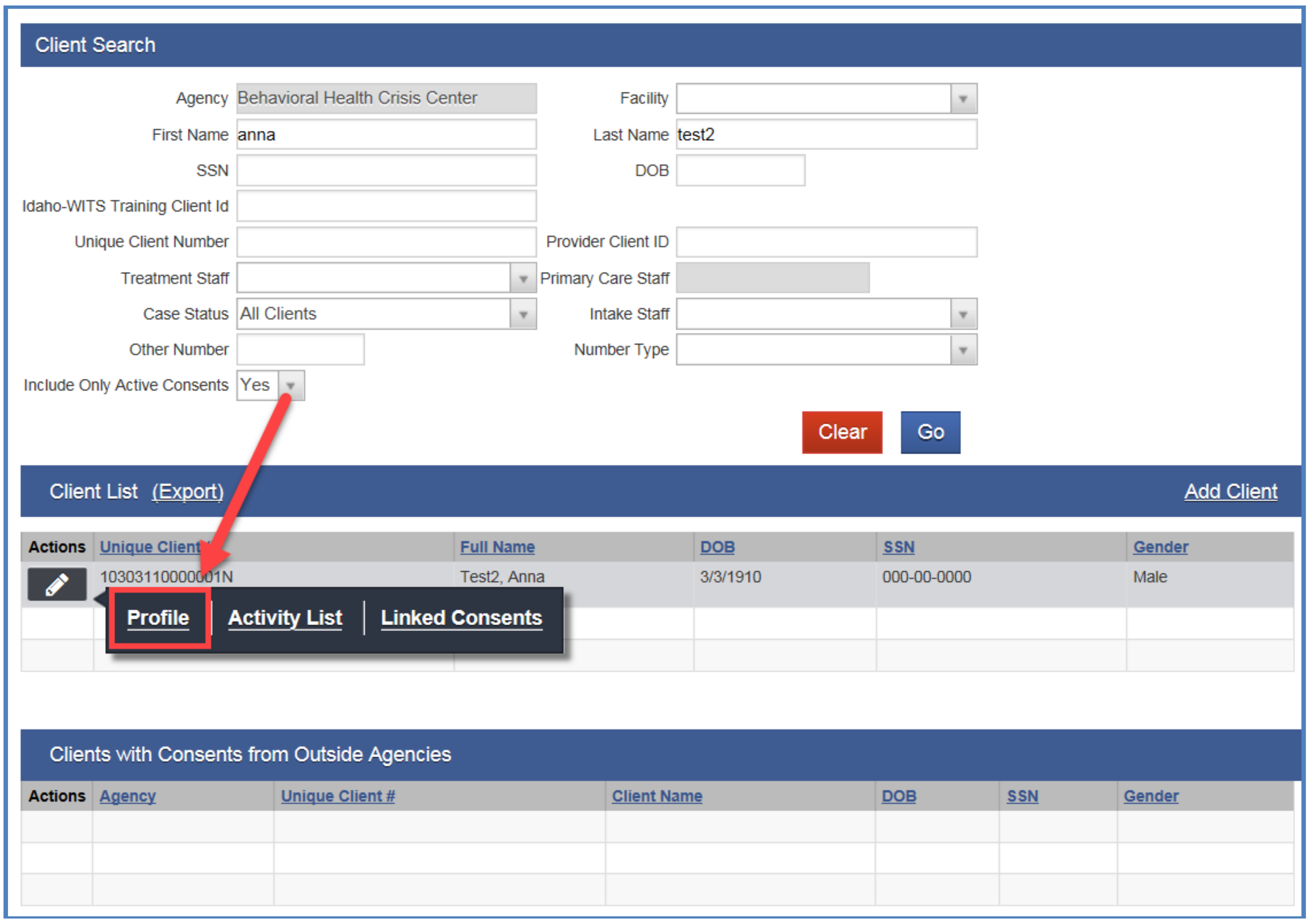
2. Click ▸ Client List in the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

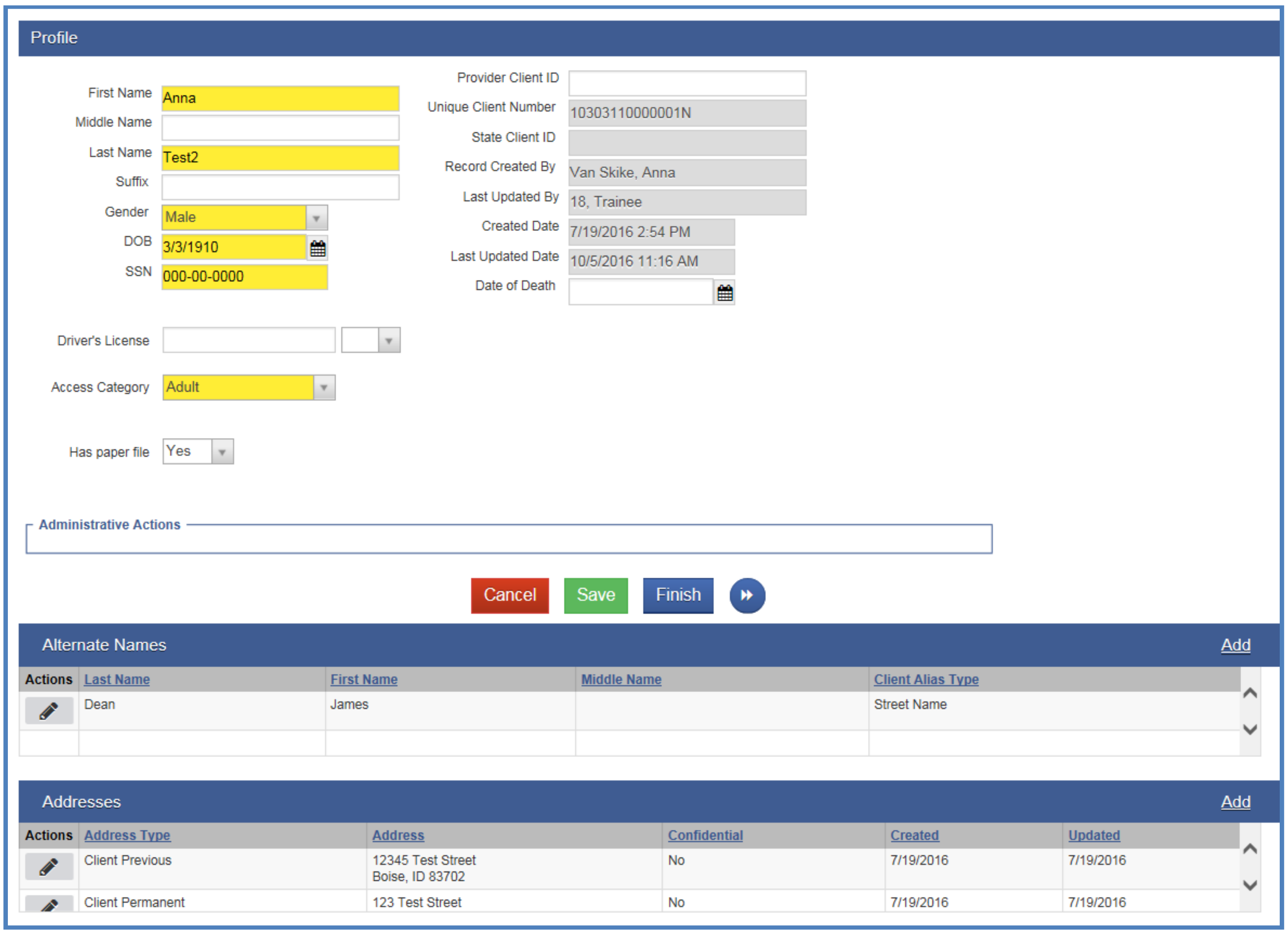
To view only Active Clients, select a Case Status of Clients with Open Cases.



3. Enter the search criteria and click Go.



4. Hover over the pencil icon and click **Profile**.



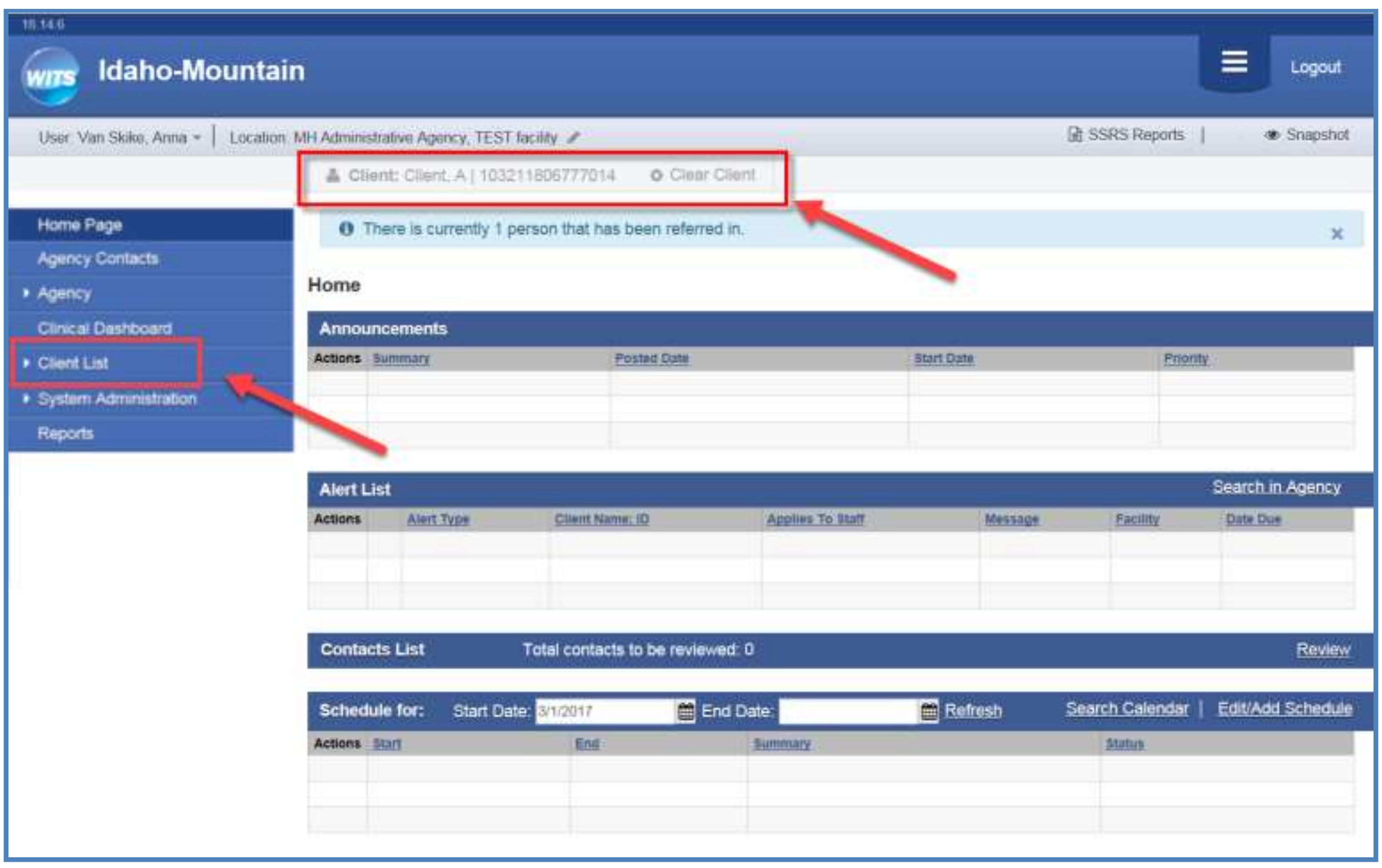
5.The Client's Profile displays.

How to view the Activity List after the Client is Selected

If you need to navigate to the Activity List and you already have the Client selected, you can do so from the blue navigation pane on the left side of the page.

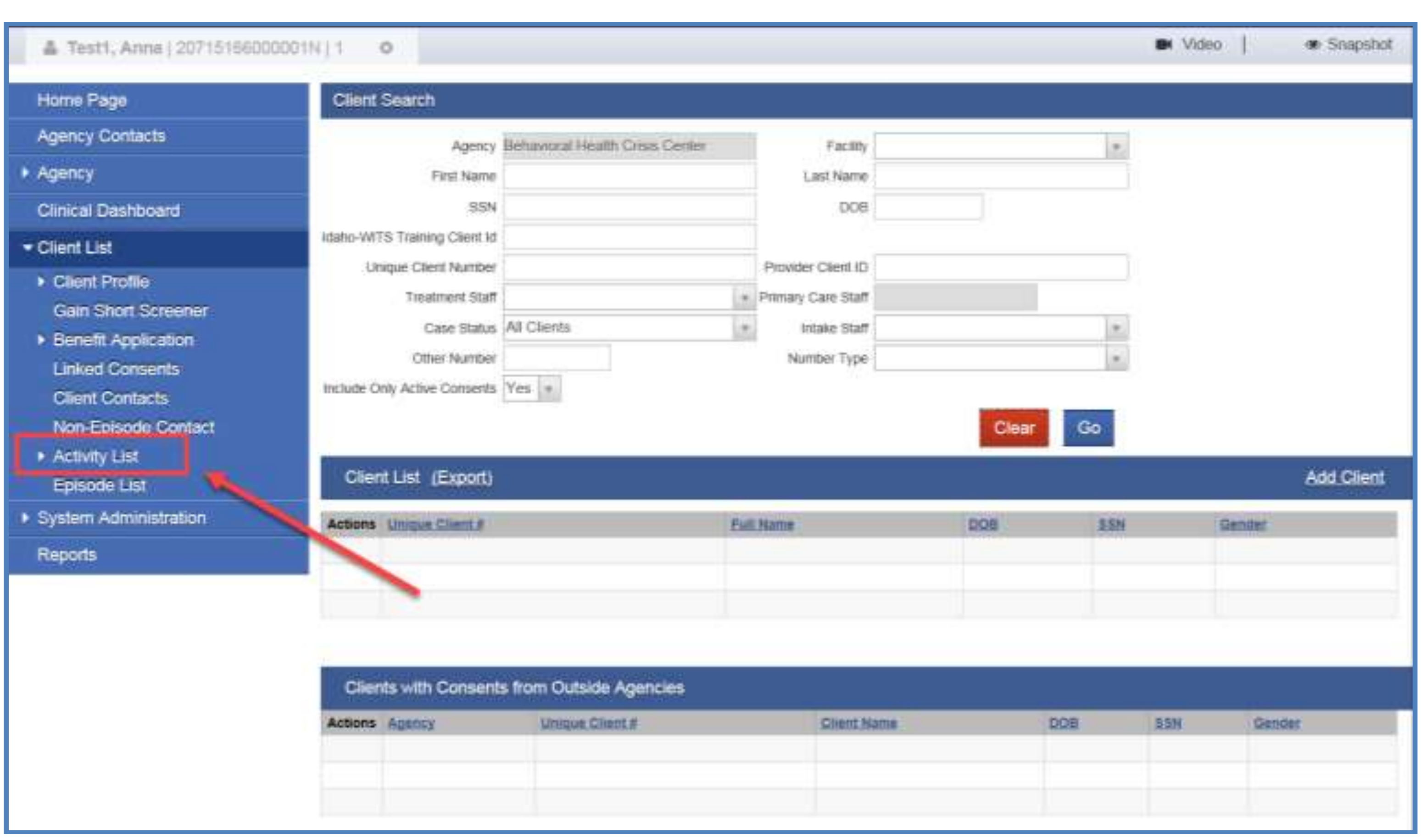
The options you see on your navigation pane may vary depending on what page you are currently on, but the Activity List is always available under the Client List section.

1. Begin on any page.

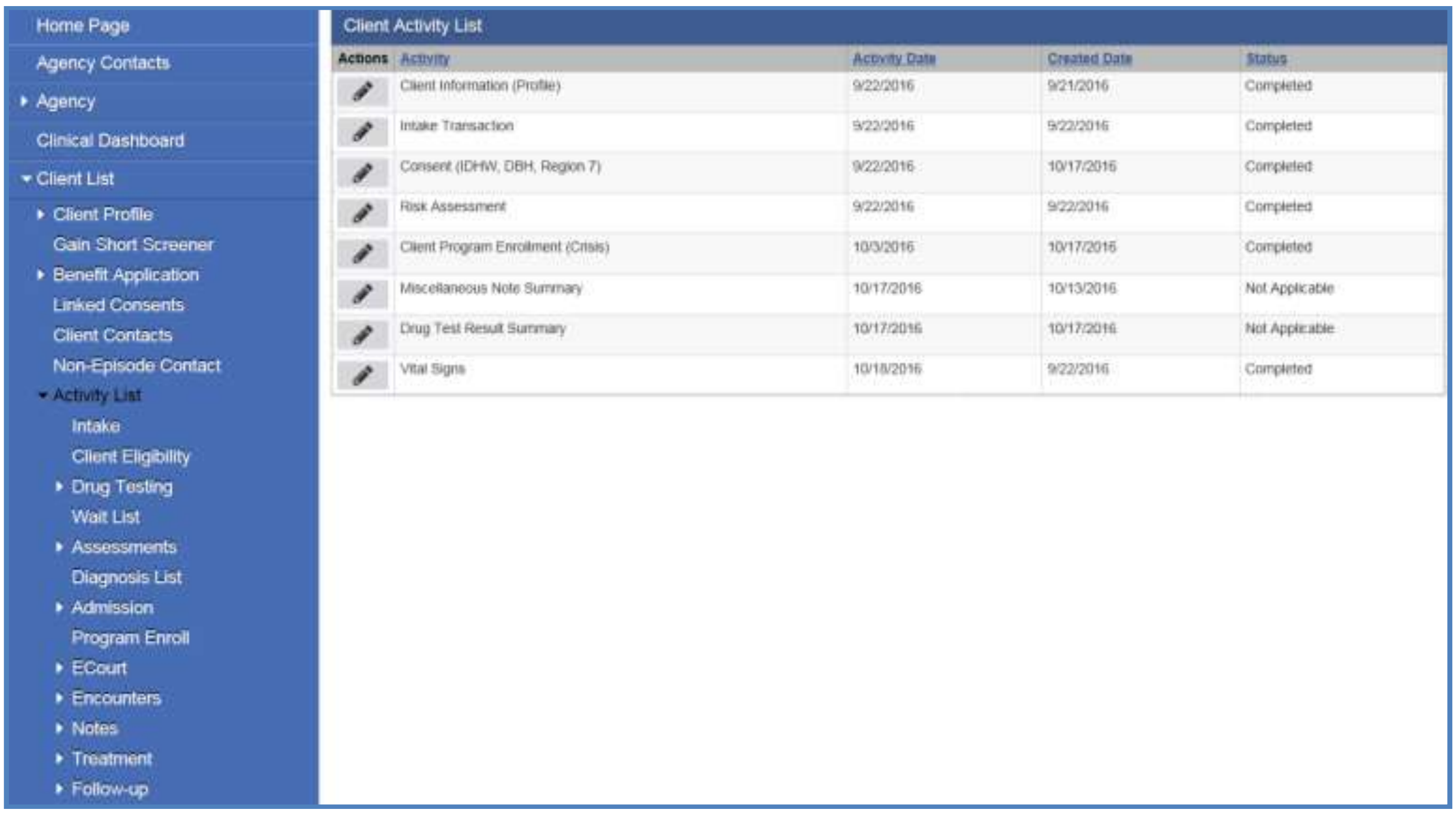


2. Make sure you have a client selected by checking the top of your page. The Client's name and UCN (Unique Client Number) will be shown in grey if they are selected.

3. Click ▾ Client List on the blue navigation pane.



4. Click Activity List on the blue navigation bar.



5. The Client's Activity List displays. Depending on the activities already completed for this client, you may have different items listed on your Activity List.

6. Hover over the and click Review under Actions to review any of the individual client activities.

How to view the Client Profile after the Client is Selected

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The options you see on your navigation pane may vary depending on what page you are currently on, but the Client Profile is always available under the Client List section.

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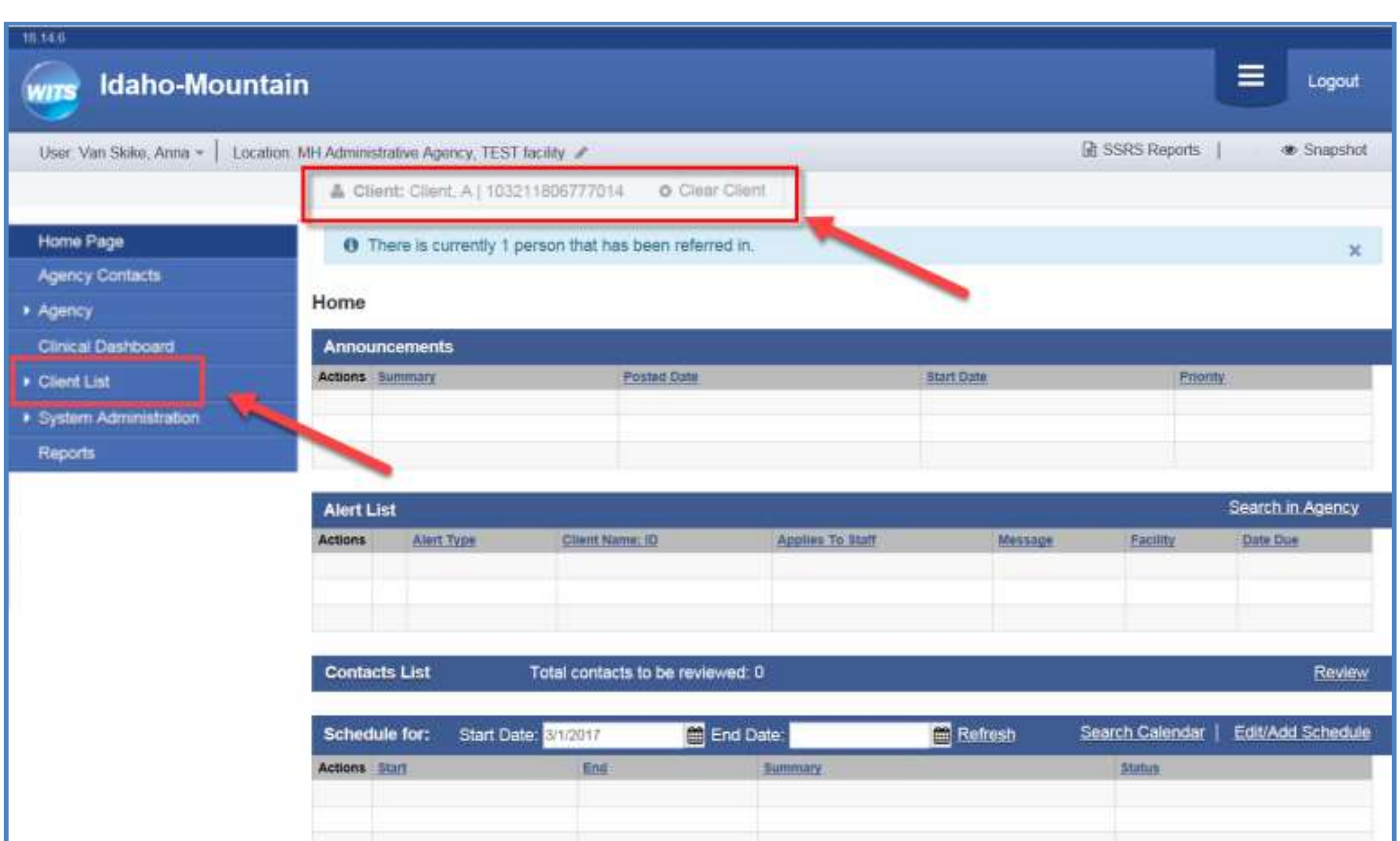
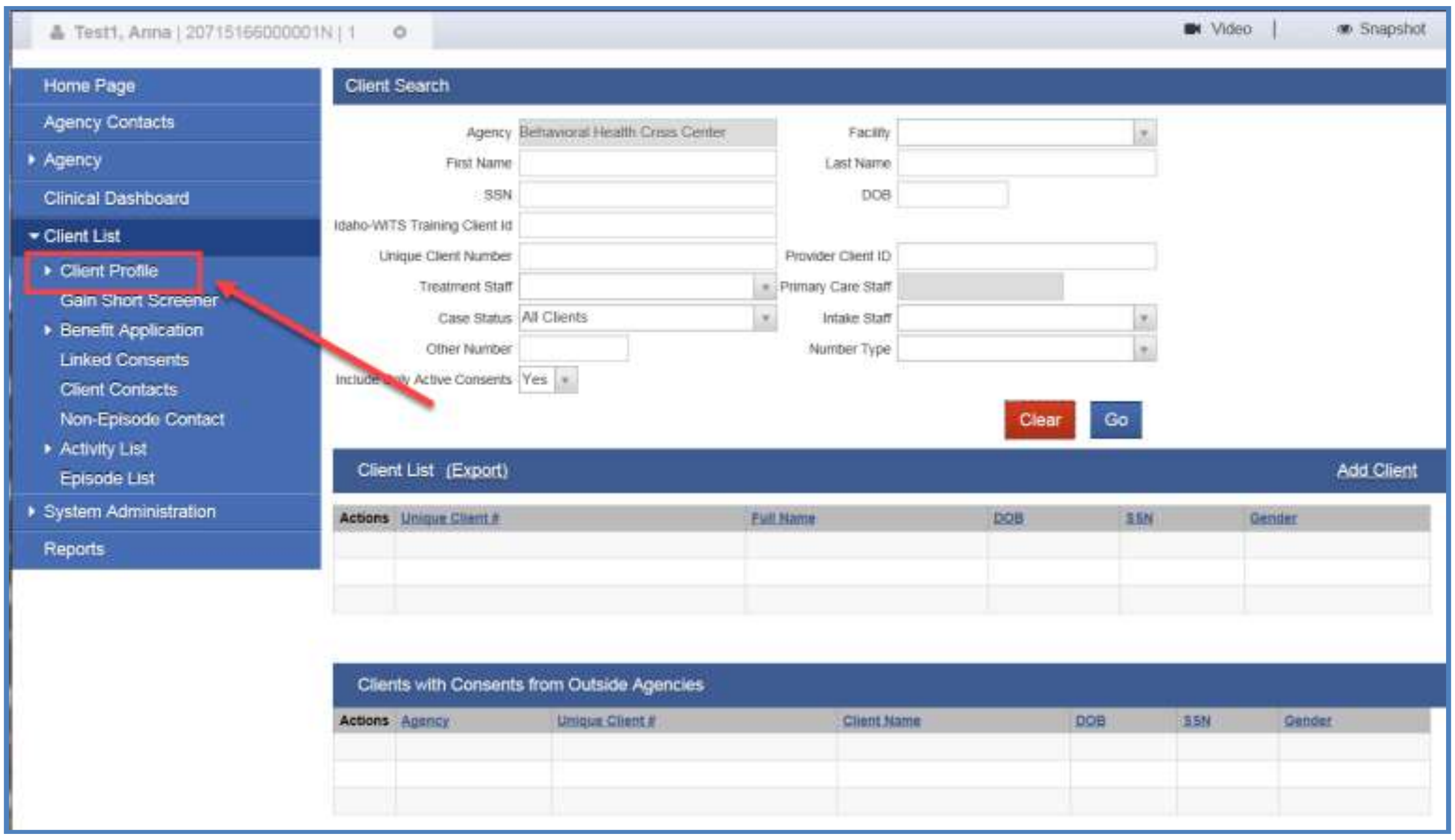


2. Make sure you have a client selected by checking the top of your page. The Client's name and UCN (Unique Client Number) will be shown in grey if they are selected.

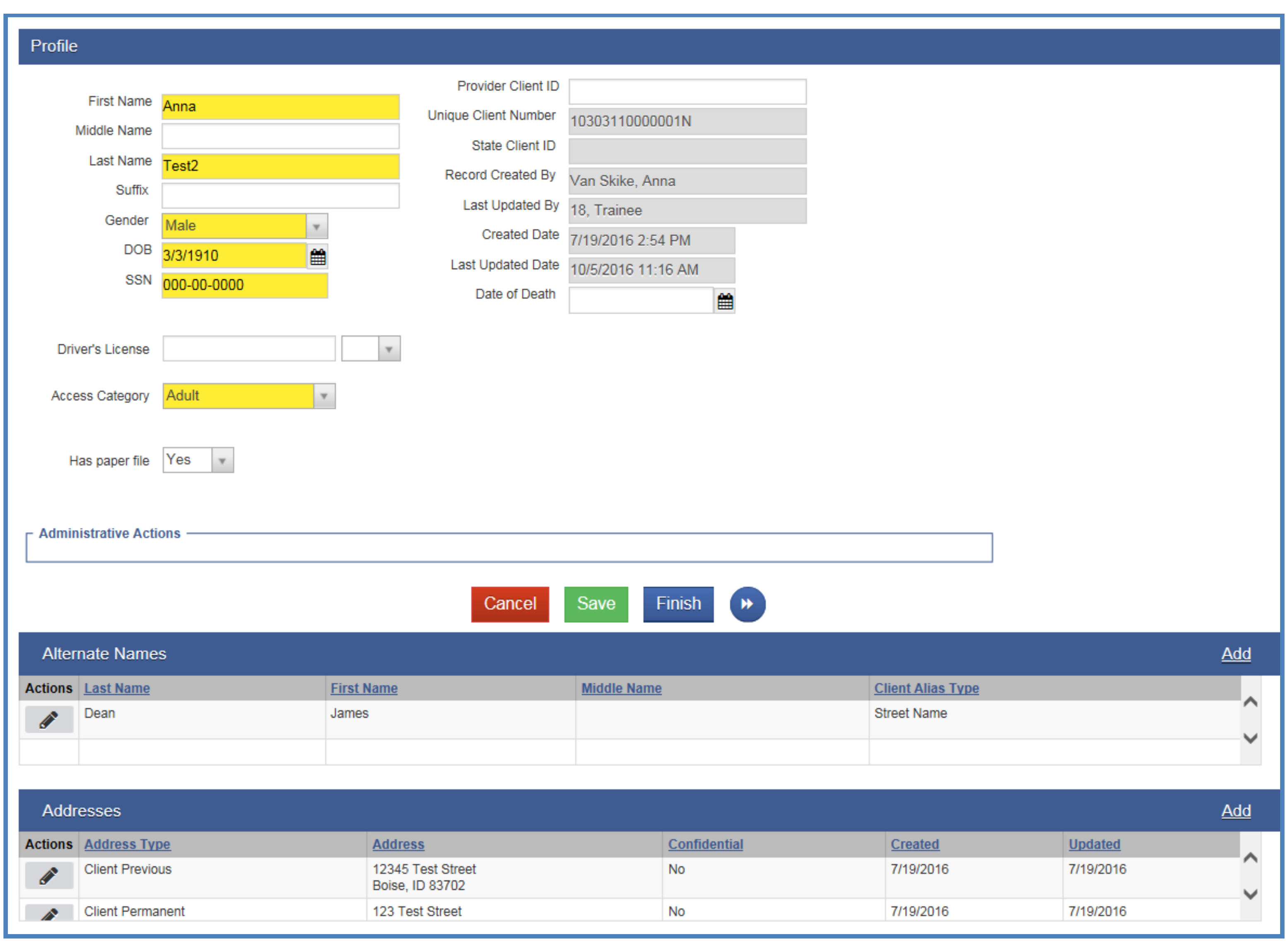
3. Click 

on the blue navigation pane.



4. Click 

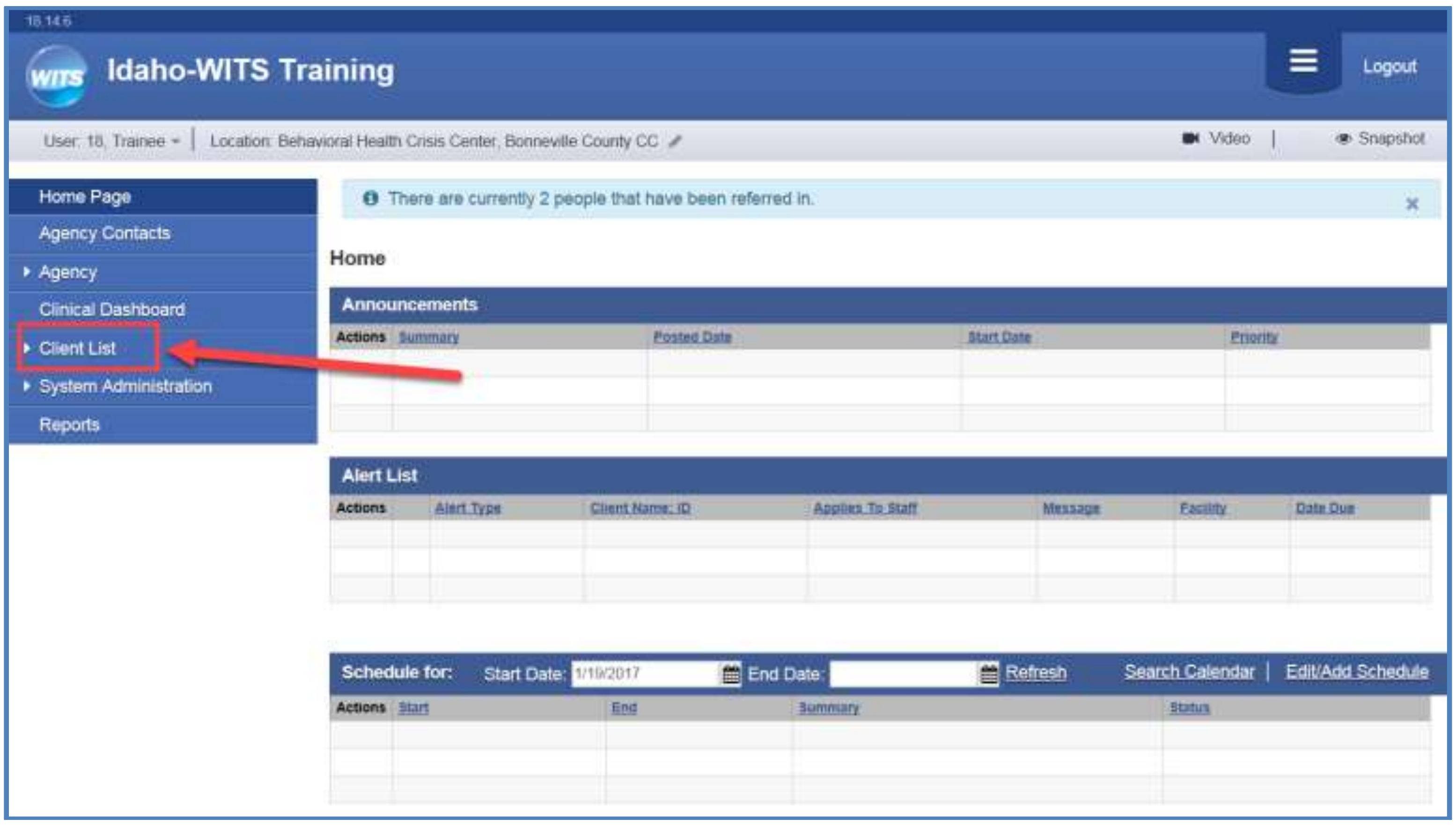
on the blue navigation pane.



5. The Client's Profile displays.

How to review a Closed Case

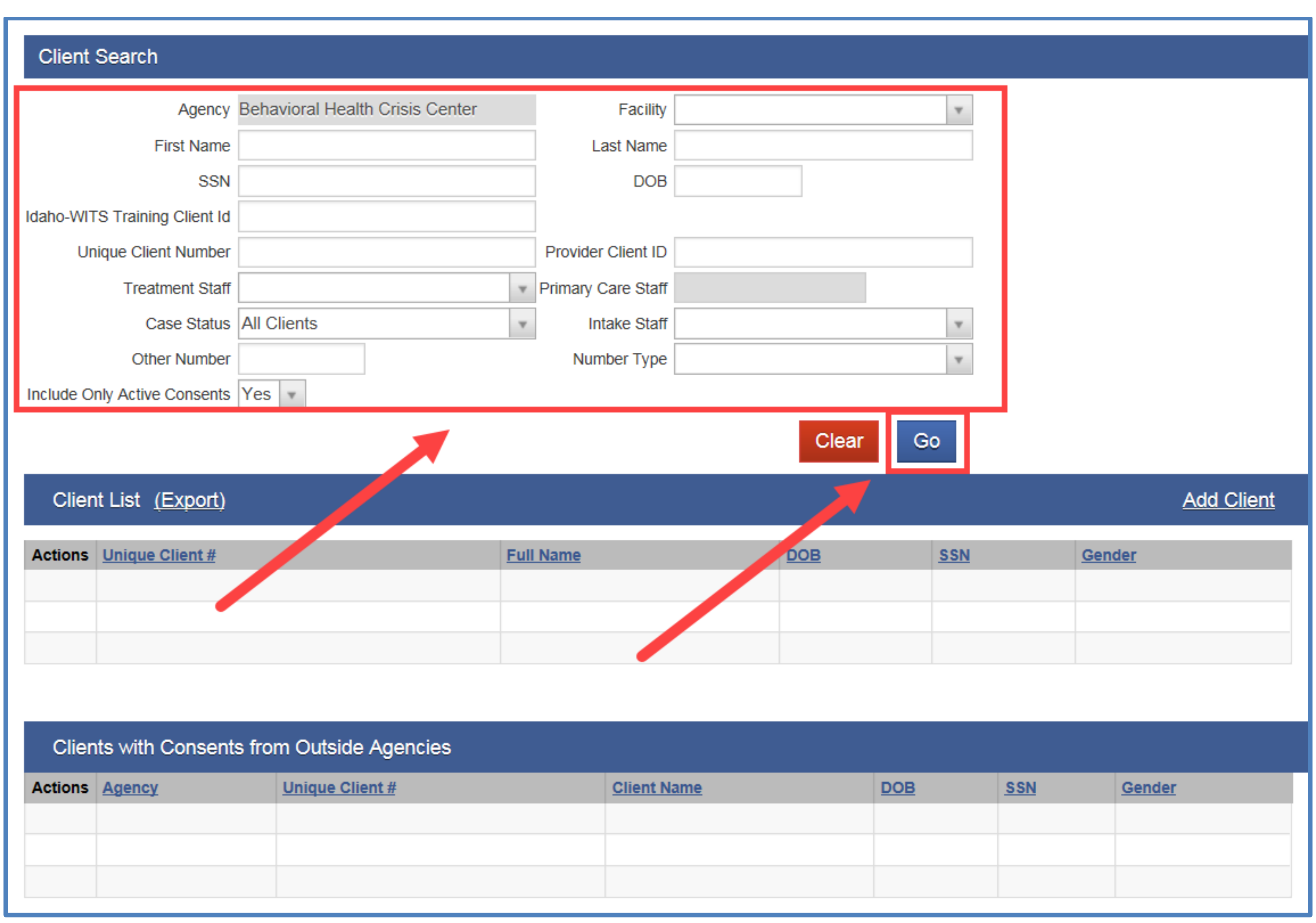
1. Begin on the Home Page.



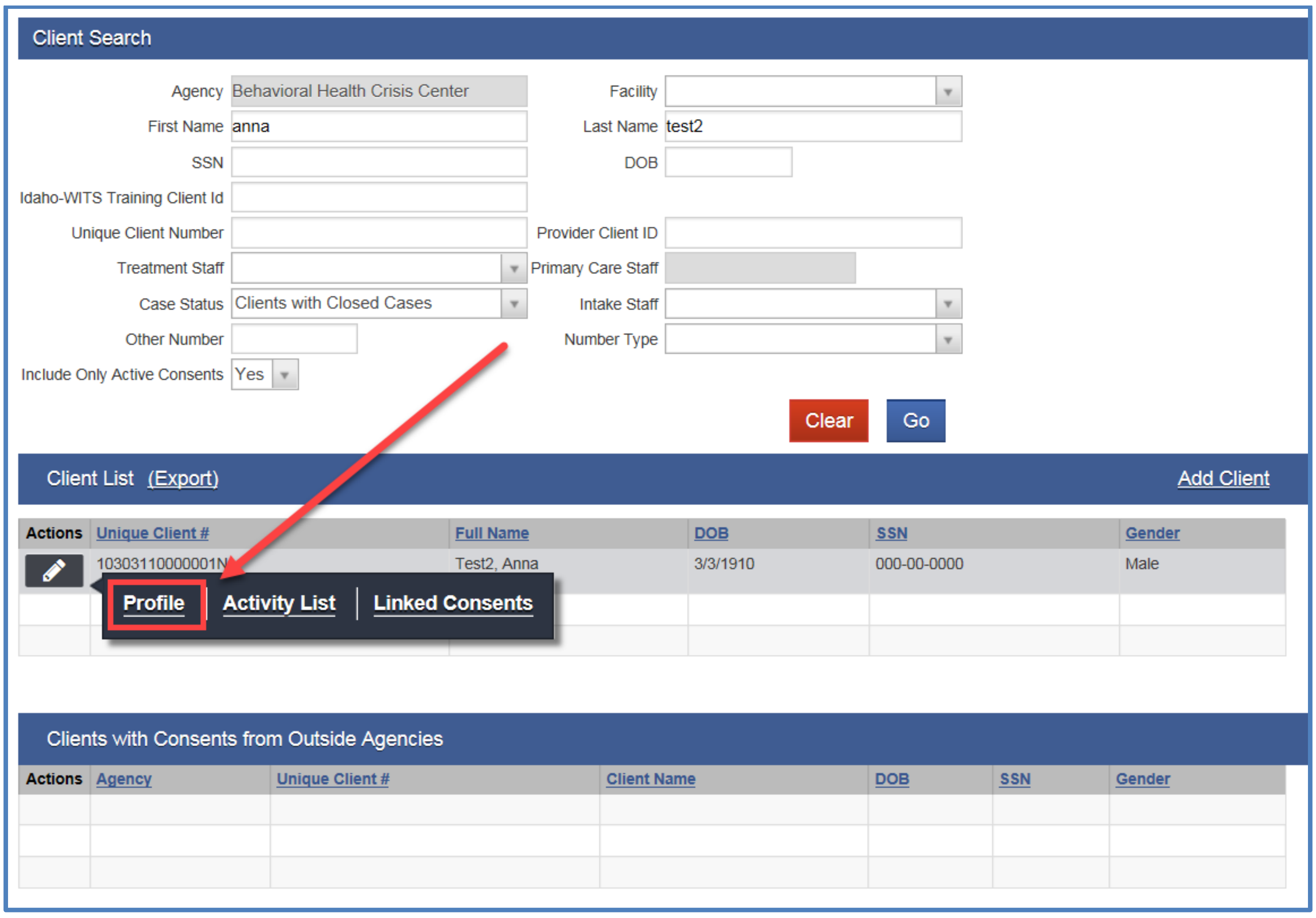
2. Click ▸ Client List on the blue navigation pane.

TIPS Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

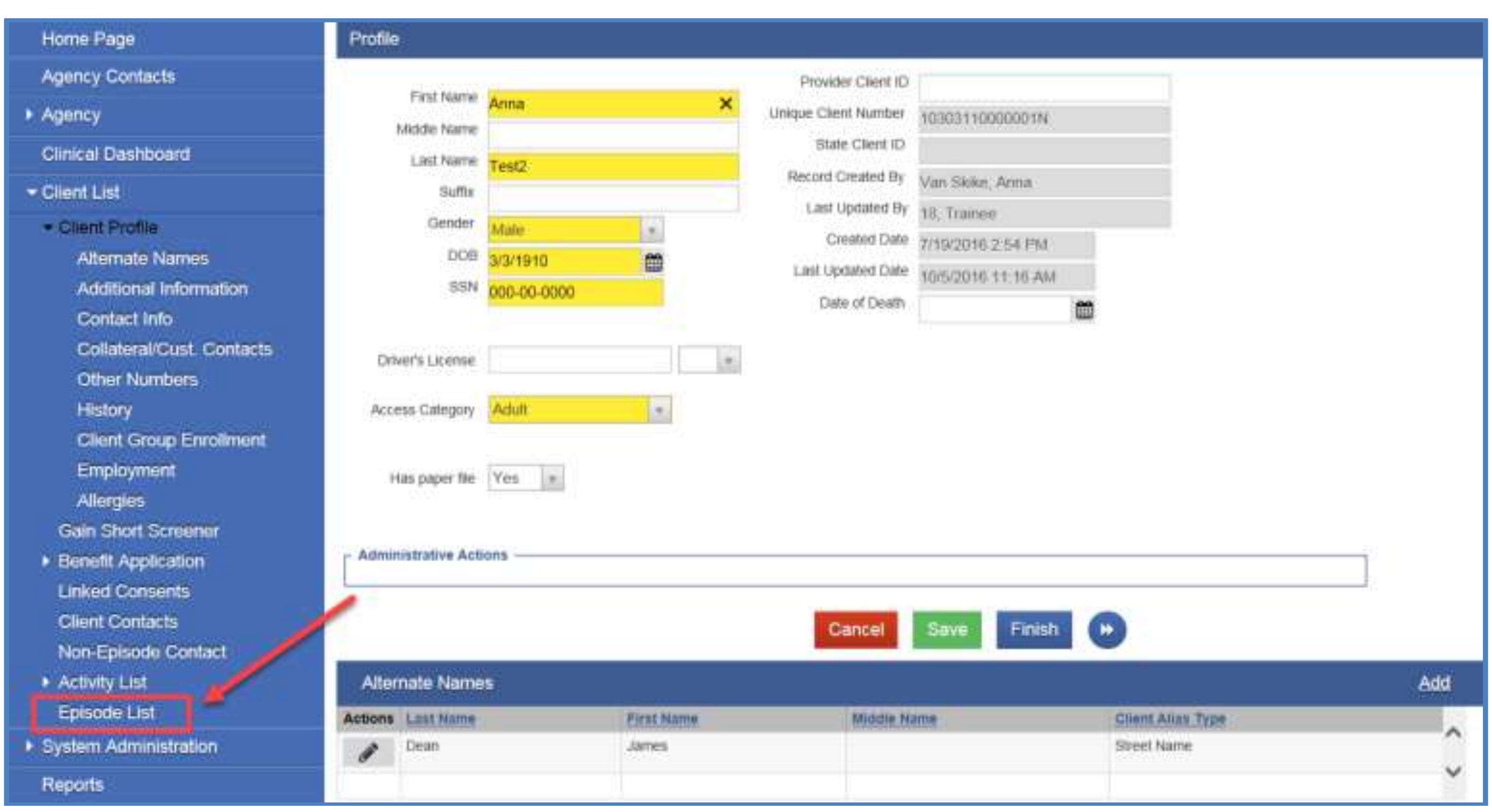
TIPS To view only Active Clients, select a Case Status of Clients with Open Cases.



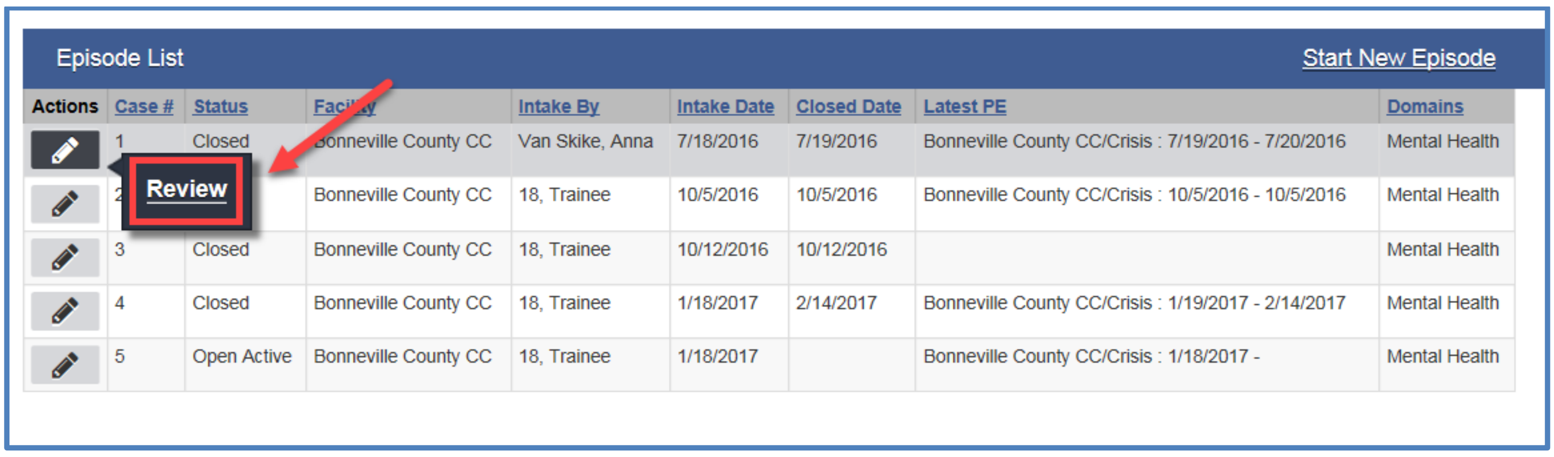
3. Enter search criteria on the Client Search page and click Go. Make sure the Case Status is either All Clients or Clients with Closed Cases.



4. Your search results will display in the Client List section. Hover over the ✎ and click Profile.



5. Click Episode List on the blue navigation pane.



6. Hover over the  and click 

to navigate to the activity list of any Closed or Open episode.

Technical Manual

The WITS Technical Manual in-depth guidance on entering information in WITS for a Behavioral Health Community Crisis Center (BHCCC).

If you are not sure where to start, check out the Crisis Center Starter Guides. They will walk you through everything you need to do in WITS from start to finish and are broken down by when the client is present and when the client is not present.

Client Profile

Purpose: The Client Profile captures demographic information about the client.

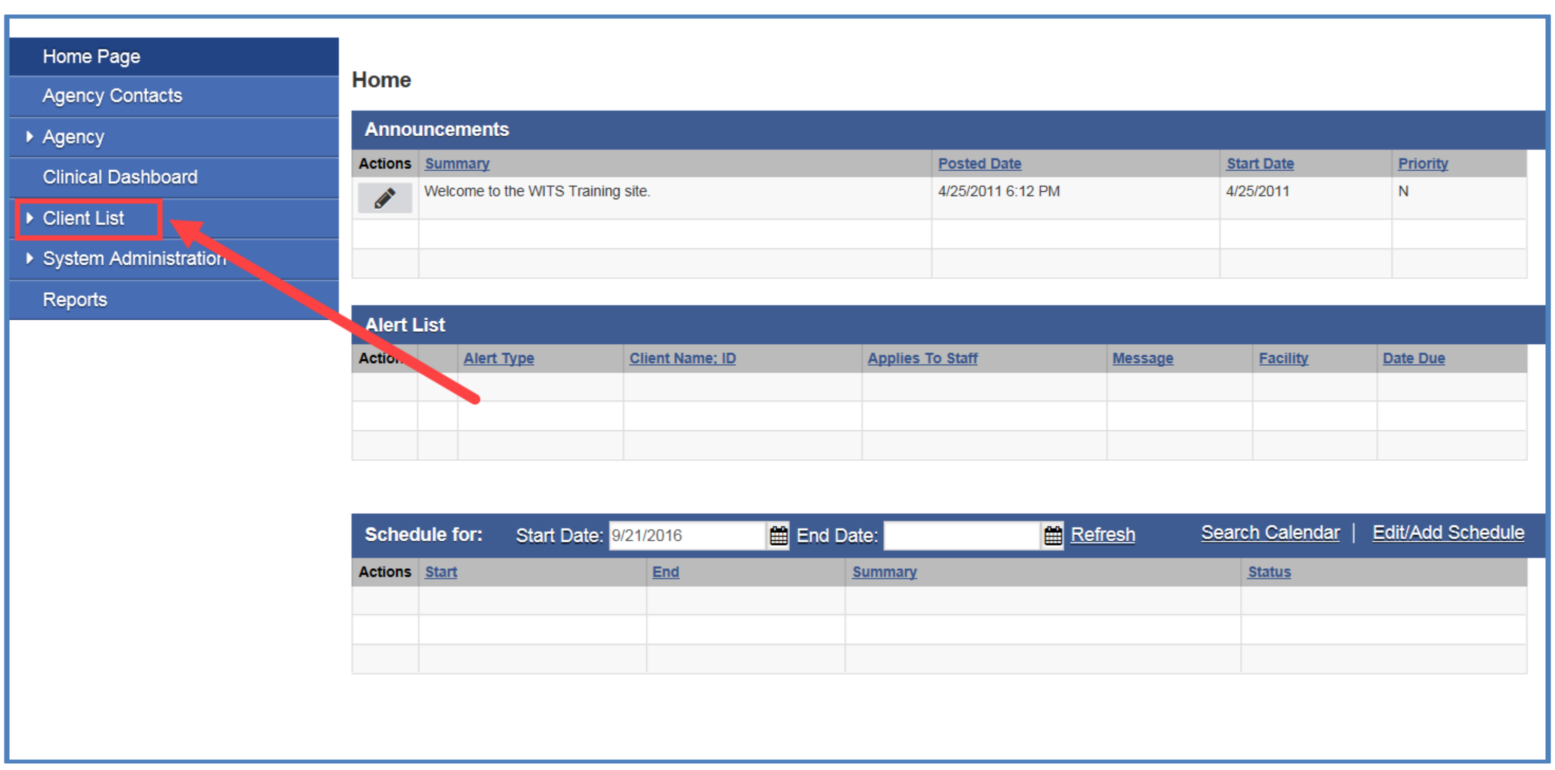
- Individuals outside of your agency do not have access to your clients in WITS.

Creating a New Client

Enter a Non-Episode Contact Note if you do not have the Client Name, Gender, Date of Birth, and Social Security Number.

Before you create a new client record, always search for the client as shown below. This will help you to avoid creating duplicate clients.

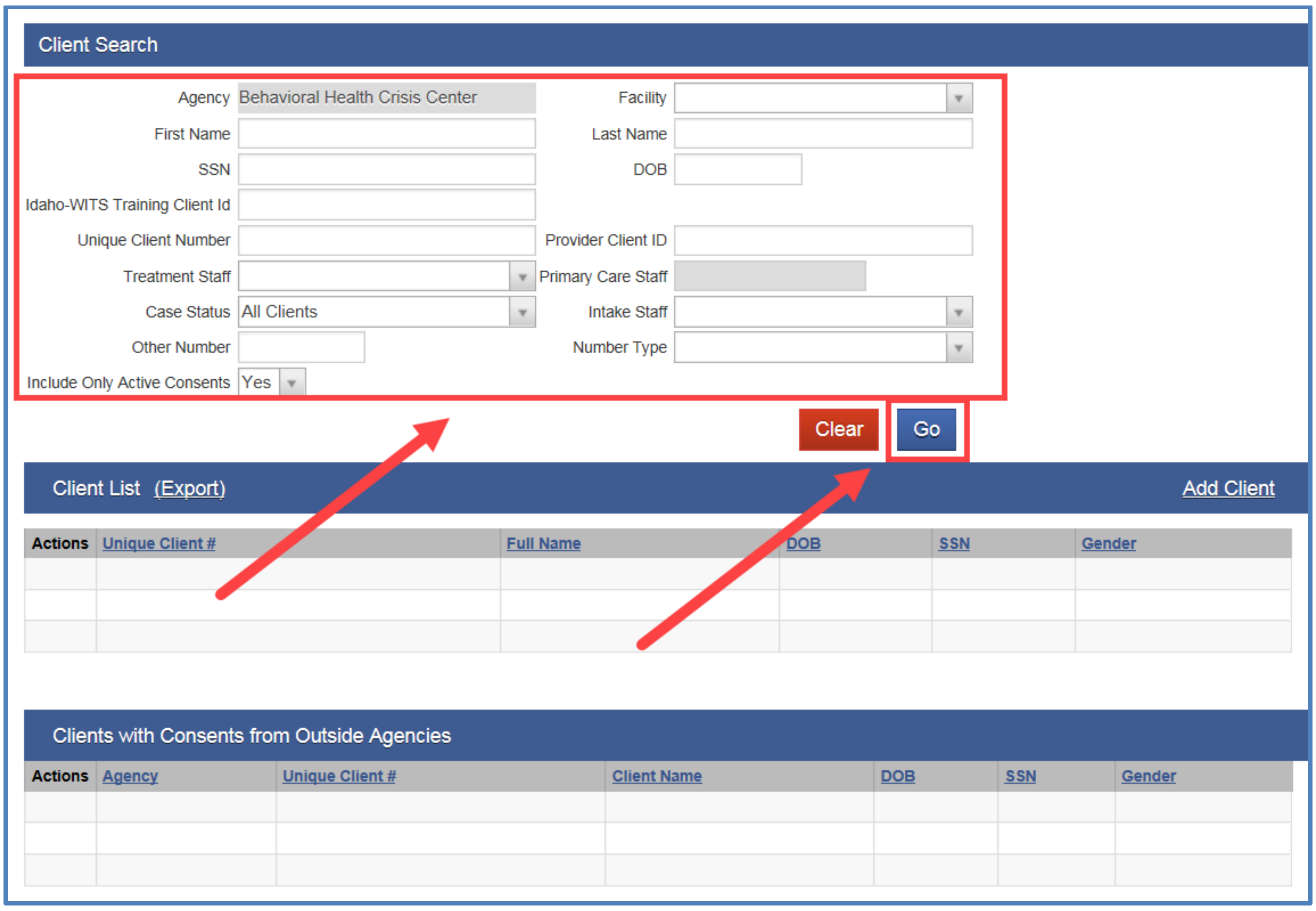
1. Begin on the Home Page.



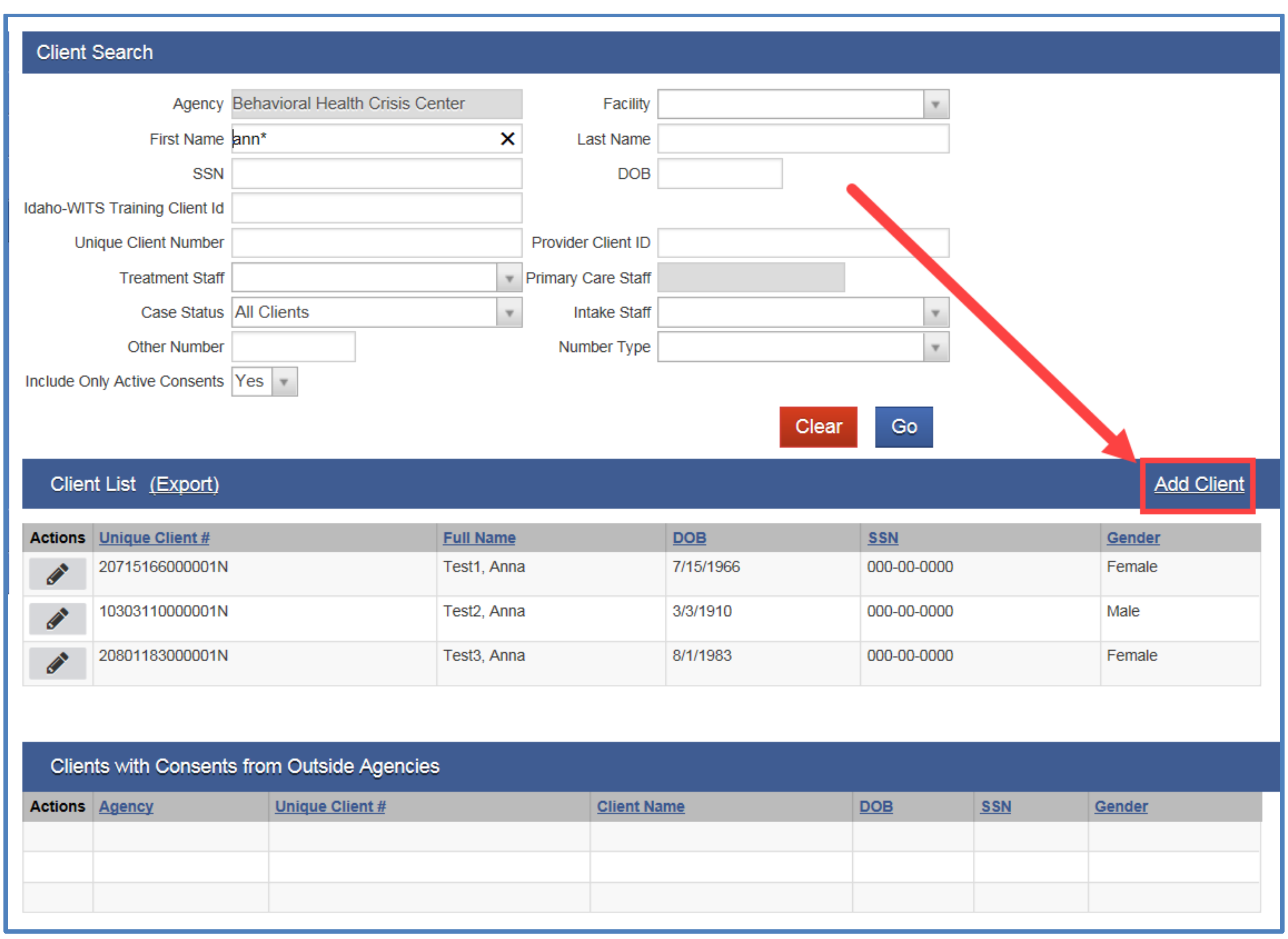
2. Click Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

To view only Active Clients, select a Case Status of Clients with Open Cases.



2. Enter the search criteria and click Go .



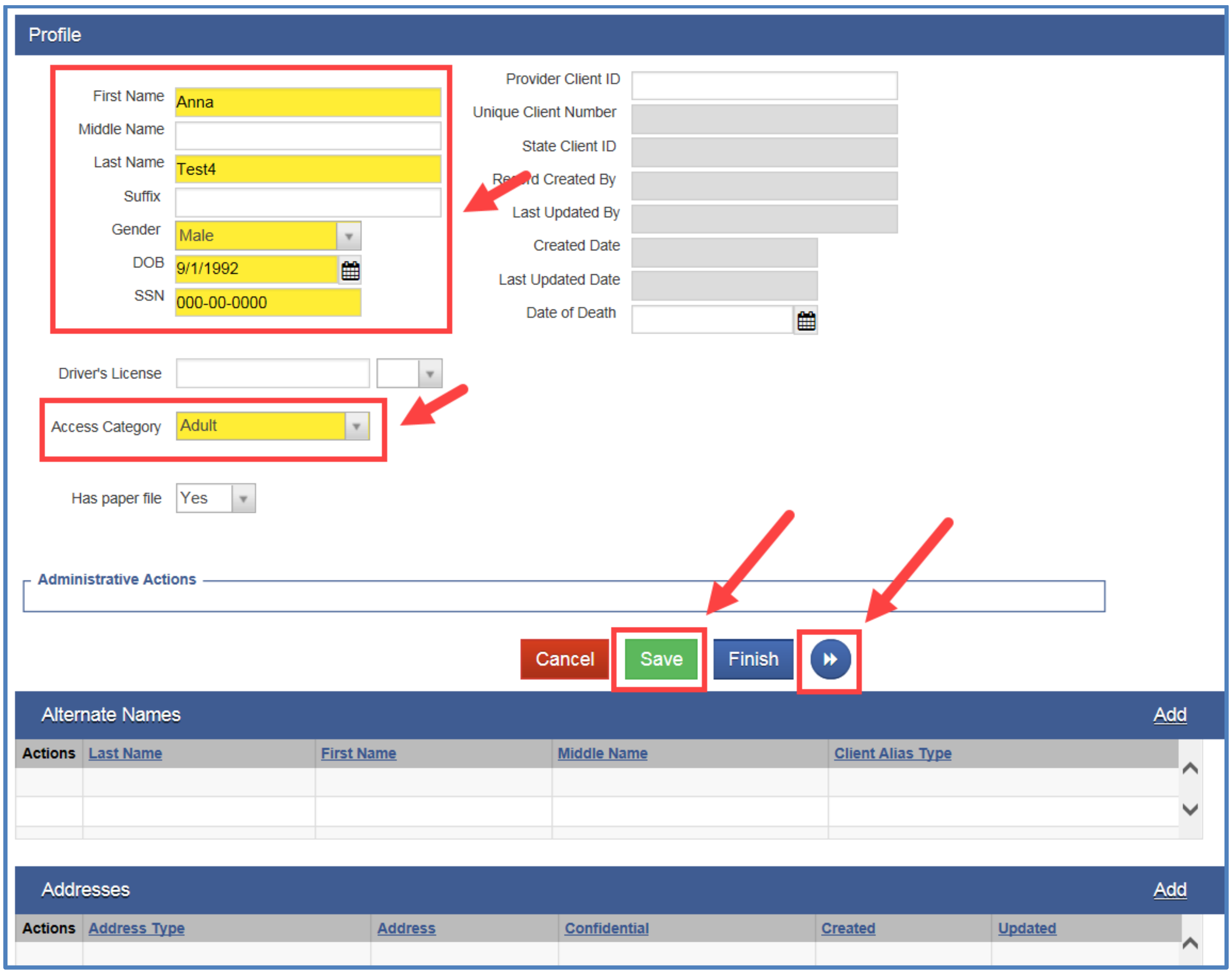
3. If you do not find your client in the Client List, click Add Client.

4. The Profile page will display.

Profile

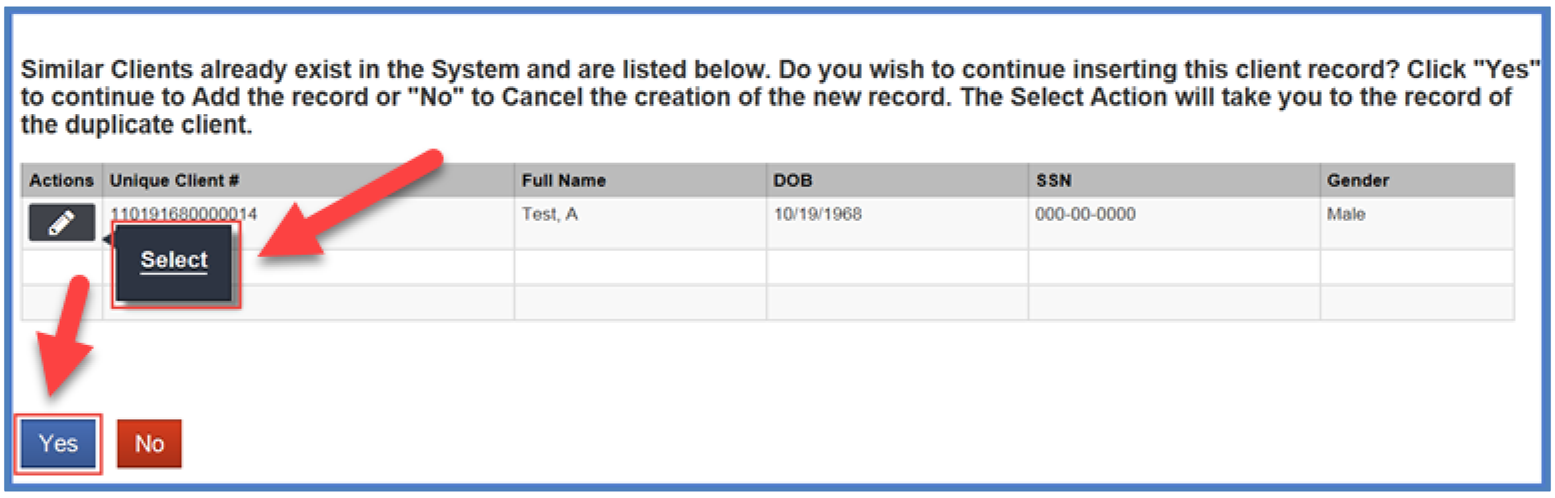
The First Name, Gender, DOB, and SSN fields are particularly important, as these fields are used to generate the Unique Client Number. Once the Unique Client Number has been created by WITS and there is an Intake for the client, it cannot be changed. Make sure that information is entered accurately, as it will affect future searches for the client in WITS.

Warning messages will display if the client is over 75 years old or less than 5 years old.



1. Complete the following fields.
   - First Name – enter client’s first name
   - Last Name – enter client’s last name
   - Gender – select the client’s gender
     - Female
     - Male
     - Refused
     - Transgender Female: person designated male at birth but identifies as female
     - Transgender Male: person designated female at birth but identifies as male
     - Unknown
   - Date of Birth – enter client’s birth date as MM/DD/YY
   - Social Security Number – it is very important to get the clients SSN up front. However, if this is not possible, the system will accept 000-00-0000 as a SSN. This is the only SSN that may be entered WITS more than once.
2. Click Save and click .

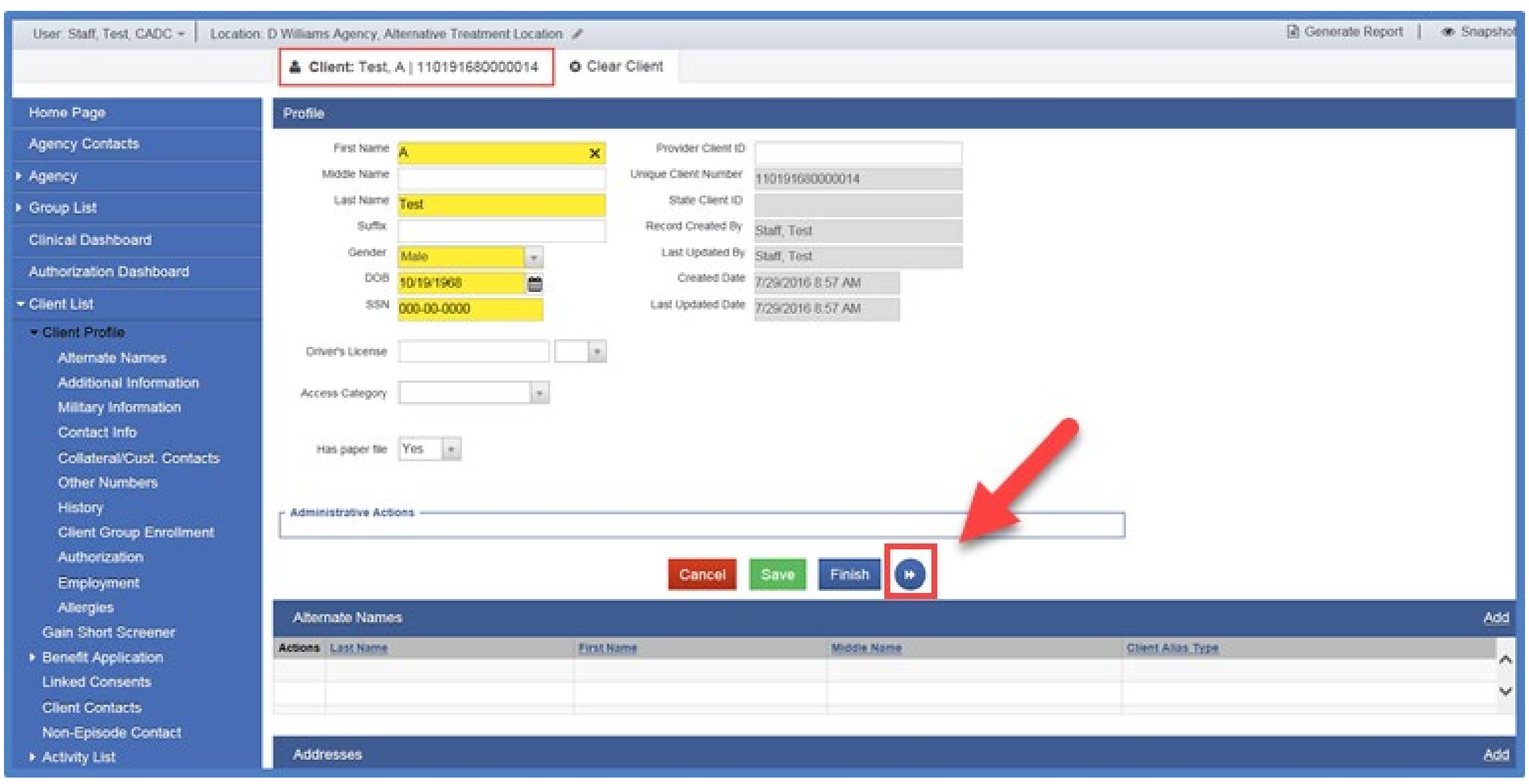
WITS is designed to prevent duplicate records. Based on first name and date of birth, the system will display a list of potential duplicates and the message below during the process of creating a client record. **When there are no potential duplicates, the below message will not display.**



3. Click and **Select** under Actions to go to the Client Profile if it is the same client (the client exists in WITS).

OR

4. Click **Yes** to continue to add the client you entered ***(if the new client is not a duplicate client record).***



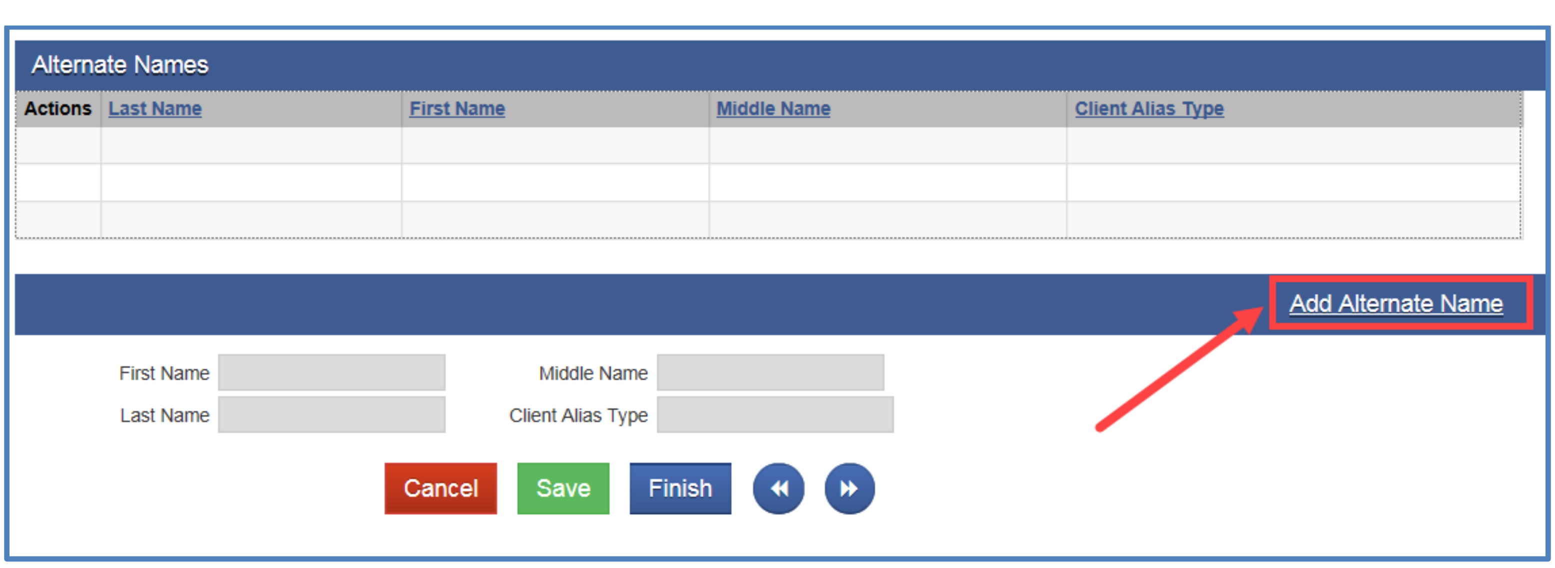
5. Once the client is created, the client's name appears in the Context area of the WITS Context Bar.

6. Click .

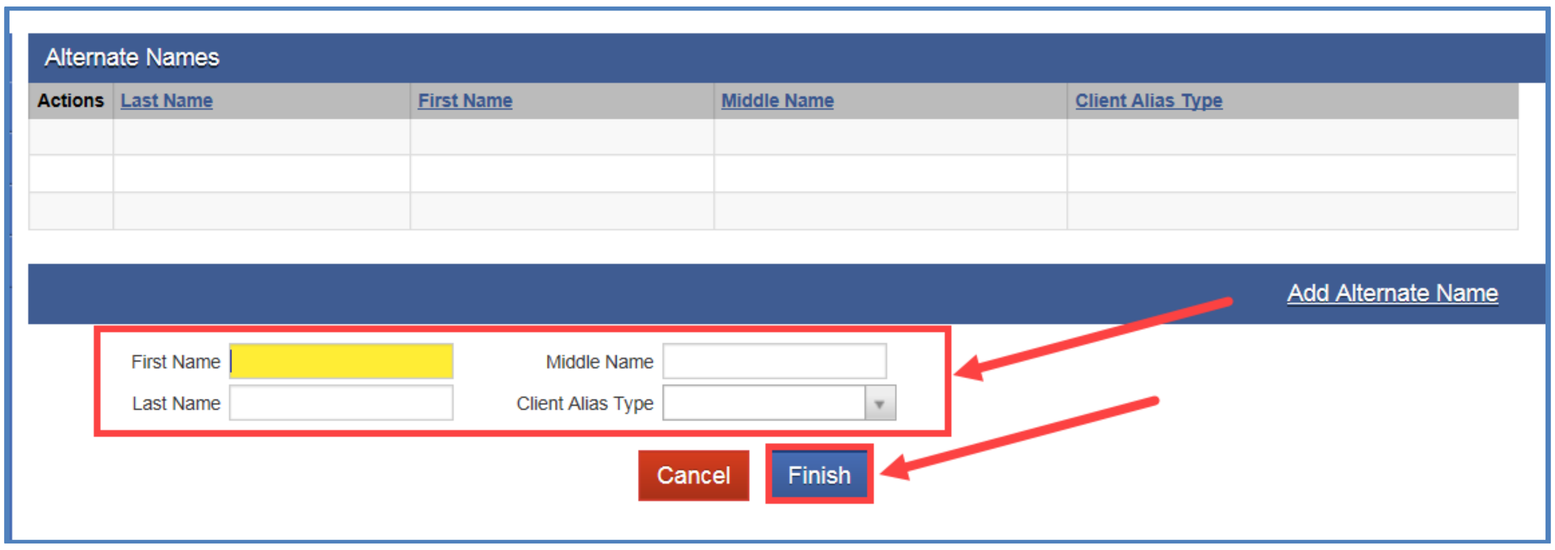
7. The Alternate Names page will display.

Alternate Names

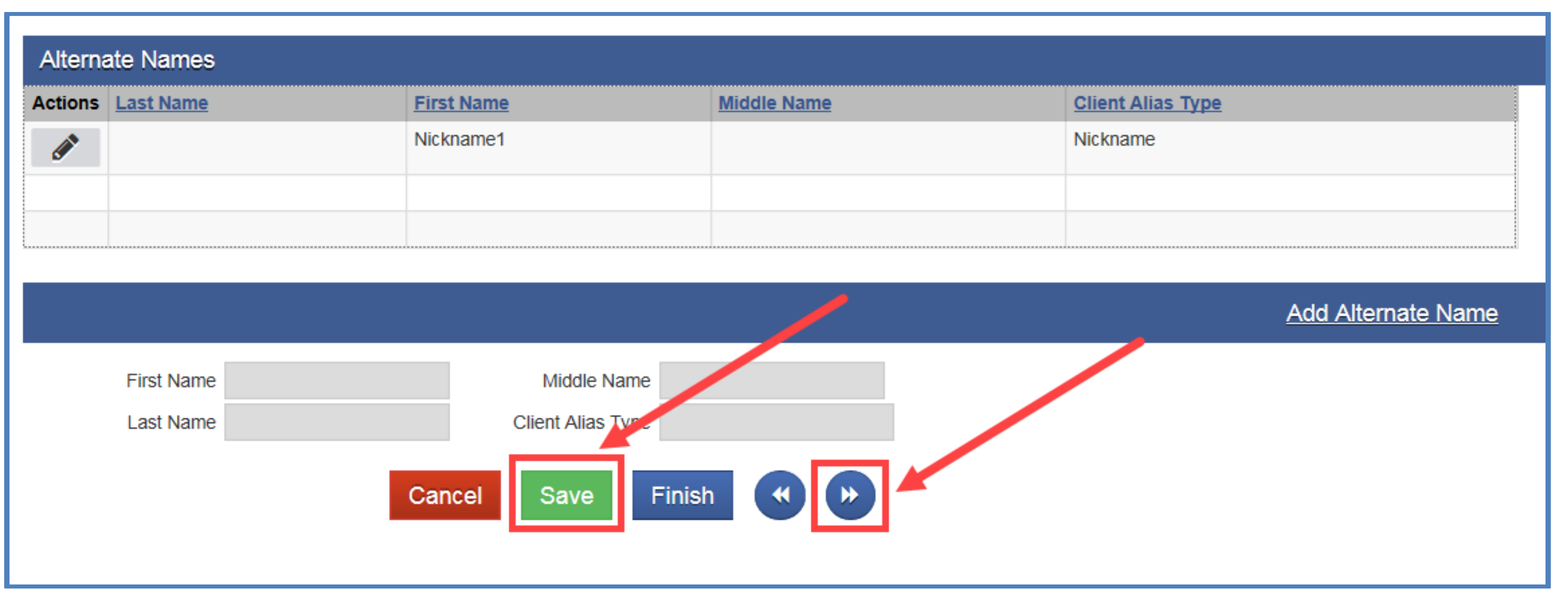
Enter all known alternate names (alias, street name, etc.) used by the client (these are searchable items on the Client Search page).



1. Click Add Alternate Name.



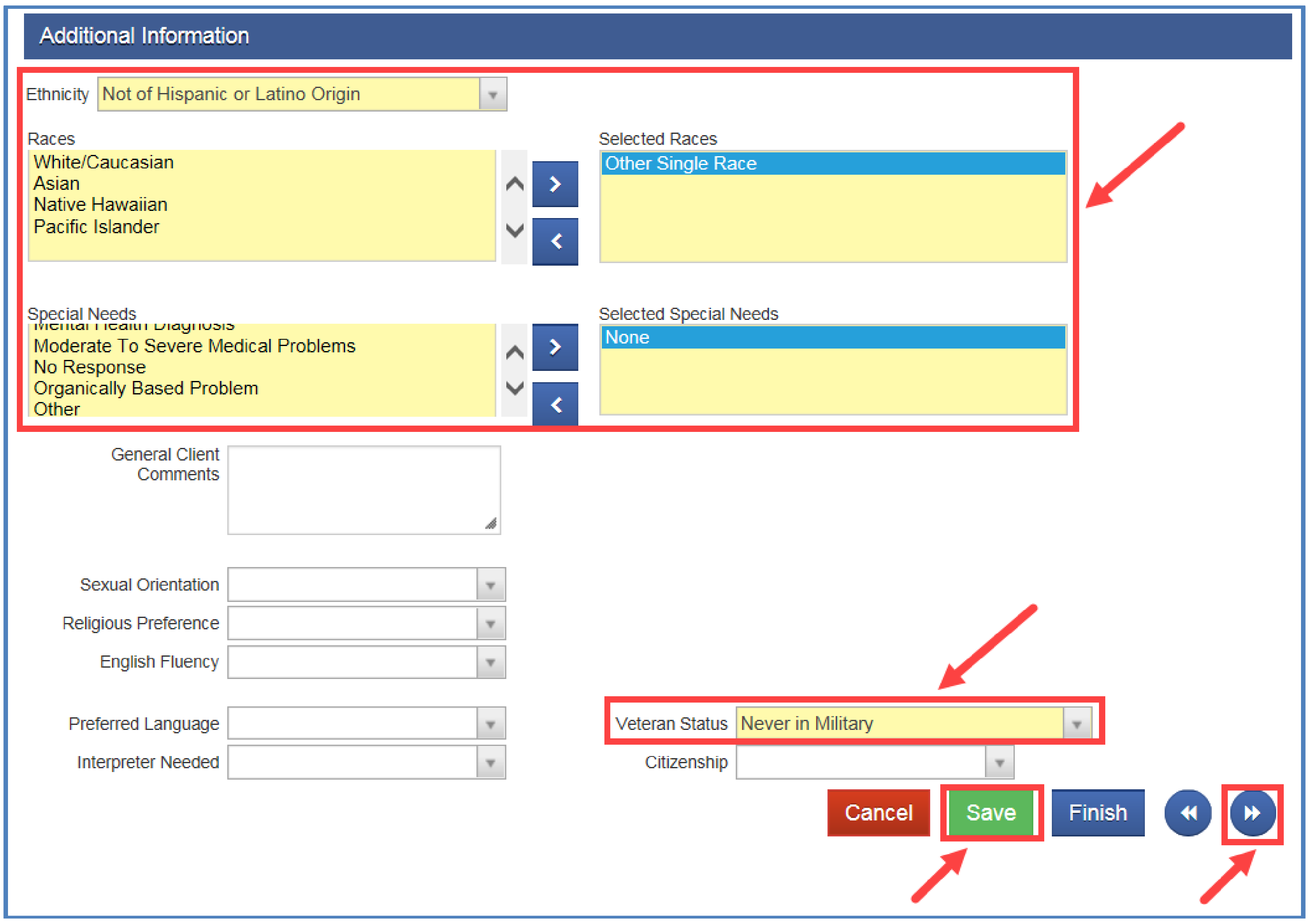
2. Complete the following fields.
   - First Name – enter the client's alternate first name.
   - Client Alias Type – select the alias type.
3. Click Finish.



4. Click Save and click .
5. The Additional Information page will display.

Additional Information

TIPS Ethnicity: Other Specific Hispanic or Latino is defined as: of known Central or South American or any other Spanish culture or origin (including Spain), other than Puerto Rican, Mexican, or Cuban, regardless of race.



1. Complete the following fields.
   - Ethnicity – select client's ethnicity.
   - Races – select all applicable race(s) and move to Selected Races.
   - Special Needs – select all applicable special needs and move to Selected Special Needs.
   - Veteran Status – select client's veteran status.

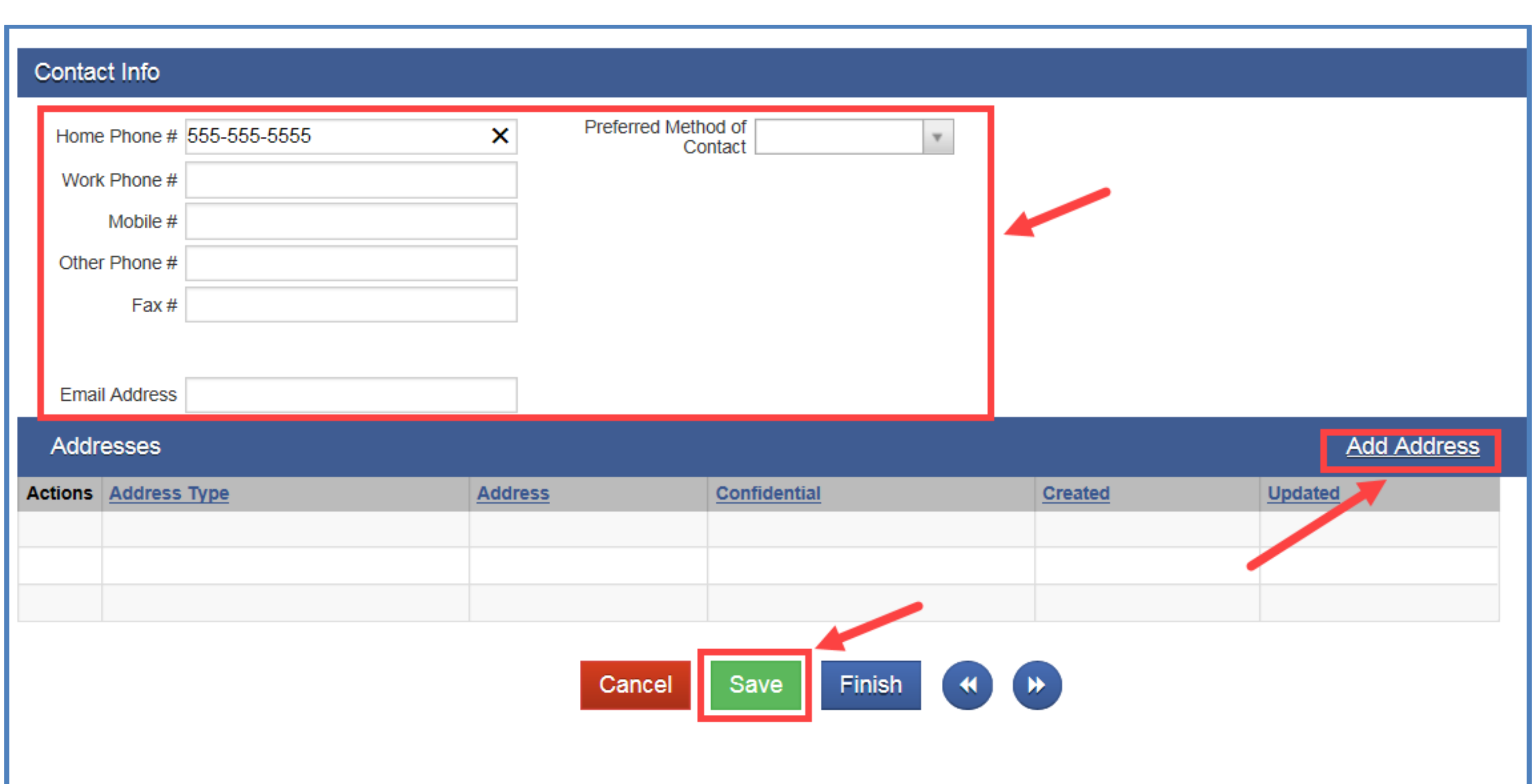
2. Click Save and click .

3. The Contact Info page will display.

Contact Info

Do not delete the client's address. When a client's address changes, review the current address and change the Address Type to Previous Address.

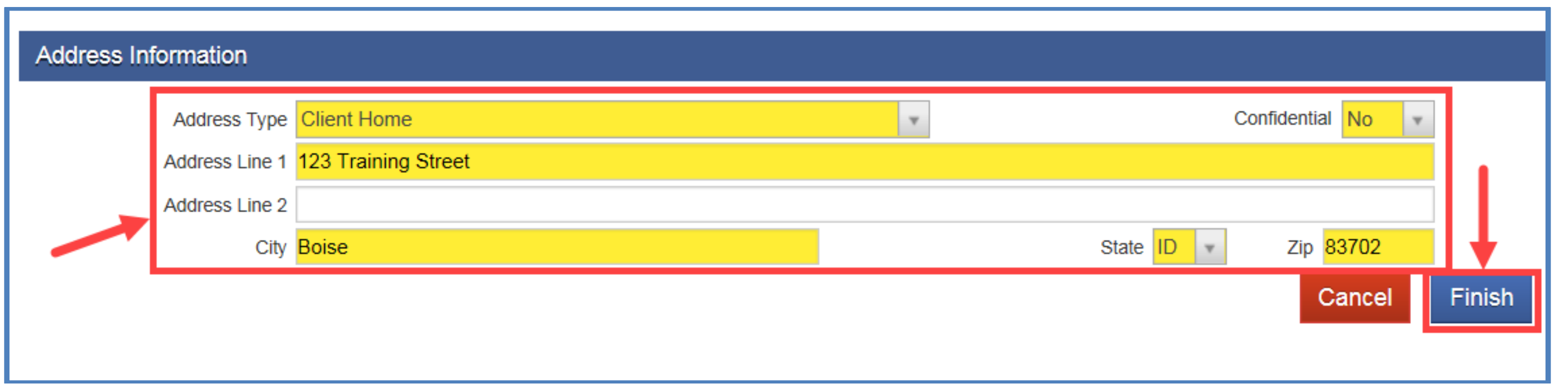
Enter all known contact information for the client.



1. Complete the following fields.
   - Phone # – enter at least one phone number.

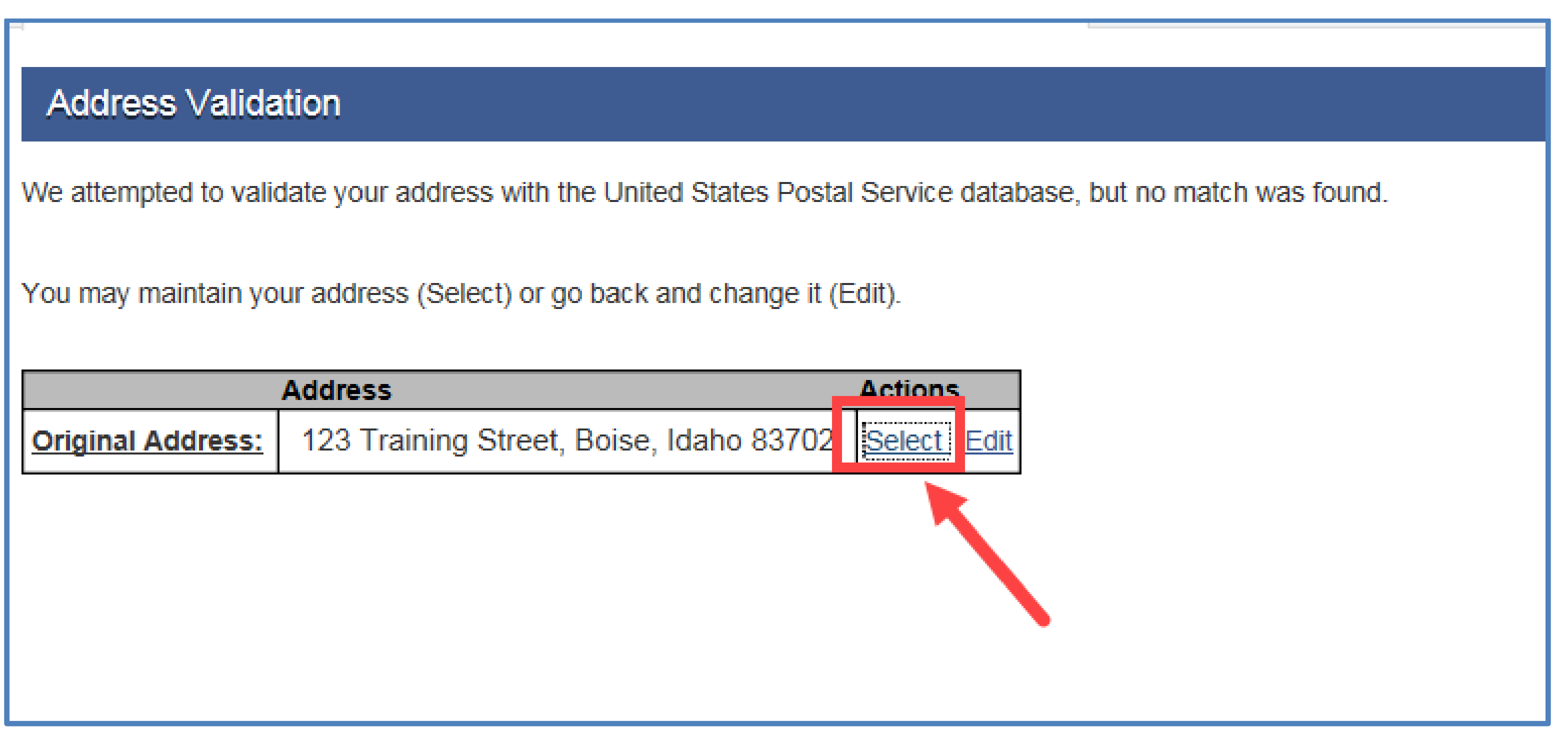
2. Click Save and Add Address.

If the client is homeless, select address type “client unknown”, put “unknown” in the address line, and then fill in the city, state, and zip code.

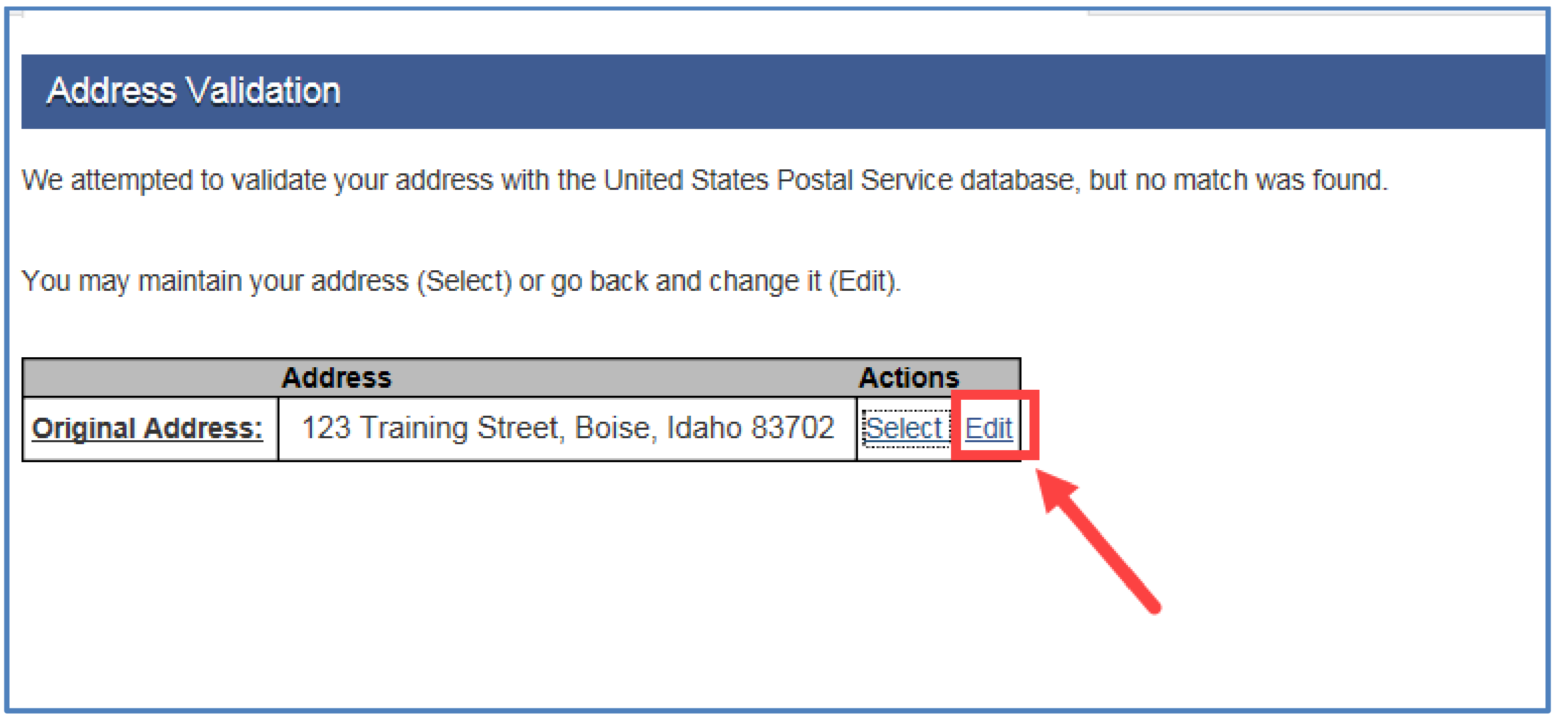


3. Complete the following fields.
   - Address Type – select the address type.
   - Confidential – select Yes or No.
   - Address Line 1 – enter the physical address.
   - Address Line 2 – enter additional physical address information.
   - City – enter the city.
   - State – the field will populate with ID. Update as needed.
   - Zip – enter the zip code.

4. Click Finish. WITS will check the address entered against the United States Postal Service database.



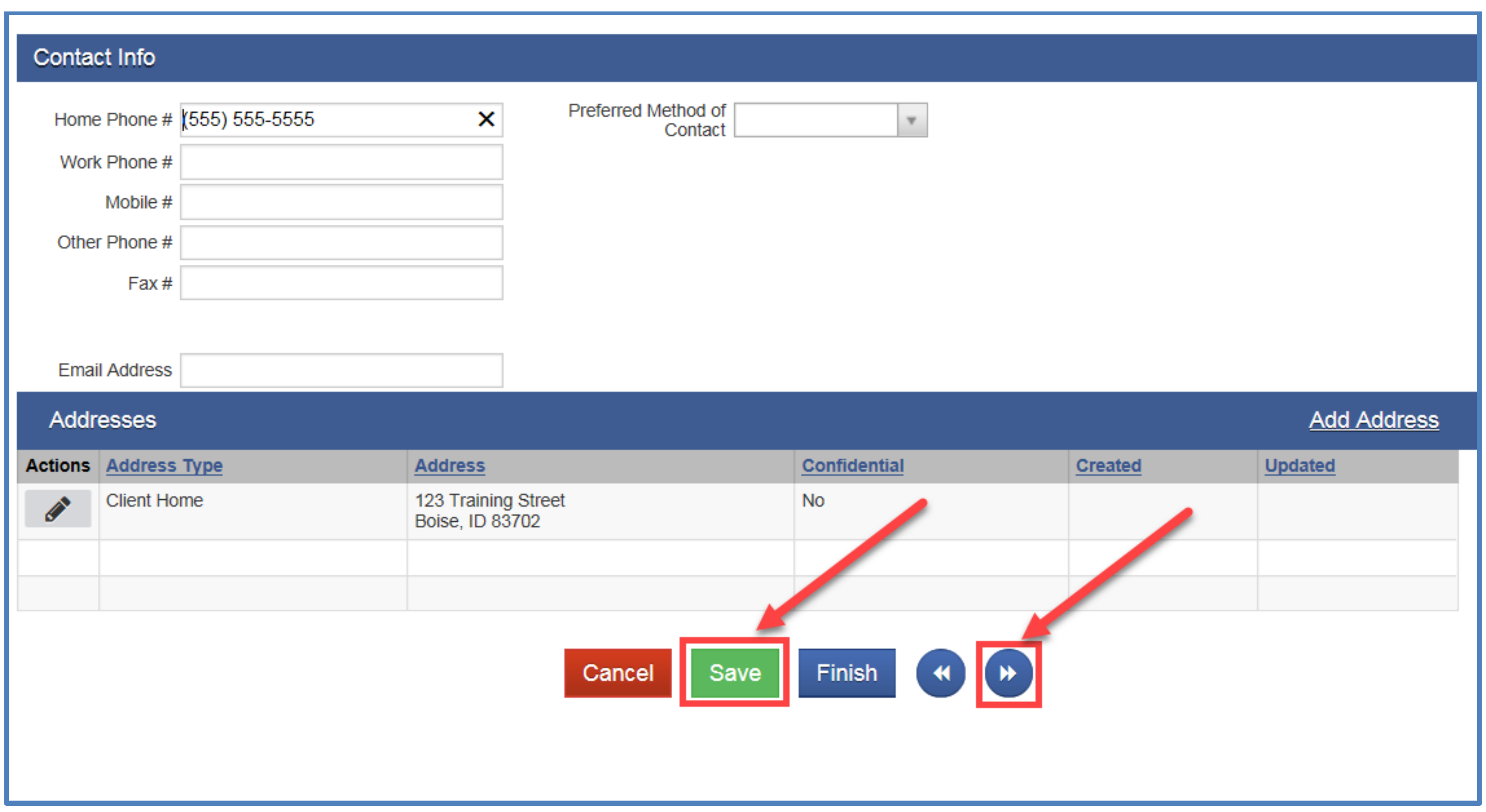
5. If the Address is located in the United States Postal Service database, then click Select next to the appropriate address.



6. If the Address is NOT located in the United States Postal Service database, click Select to select this address

OR

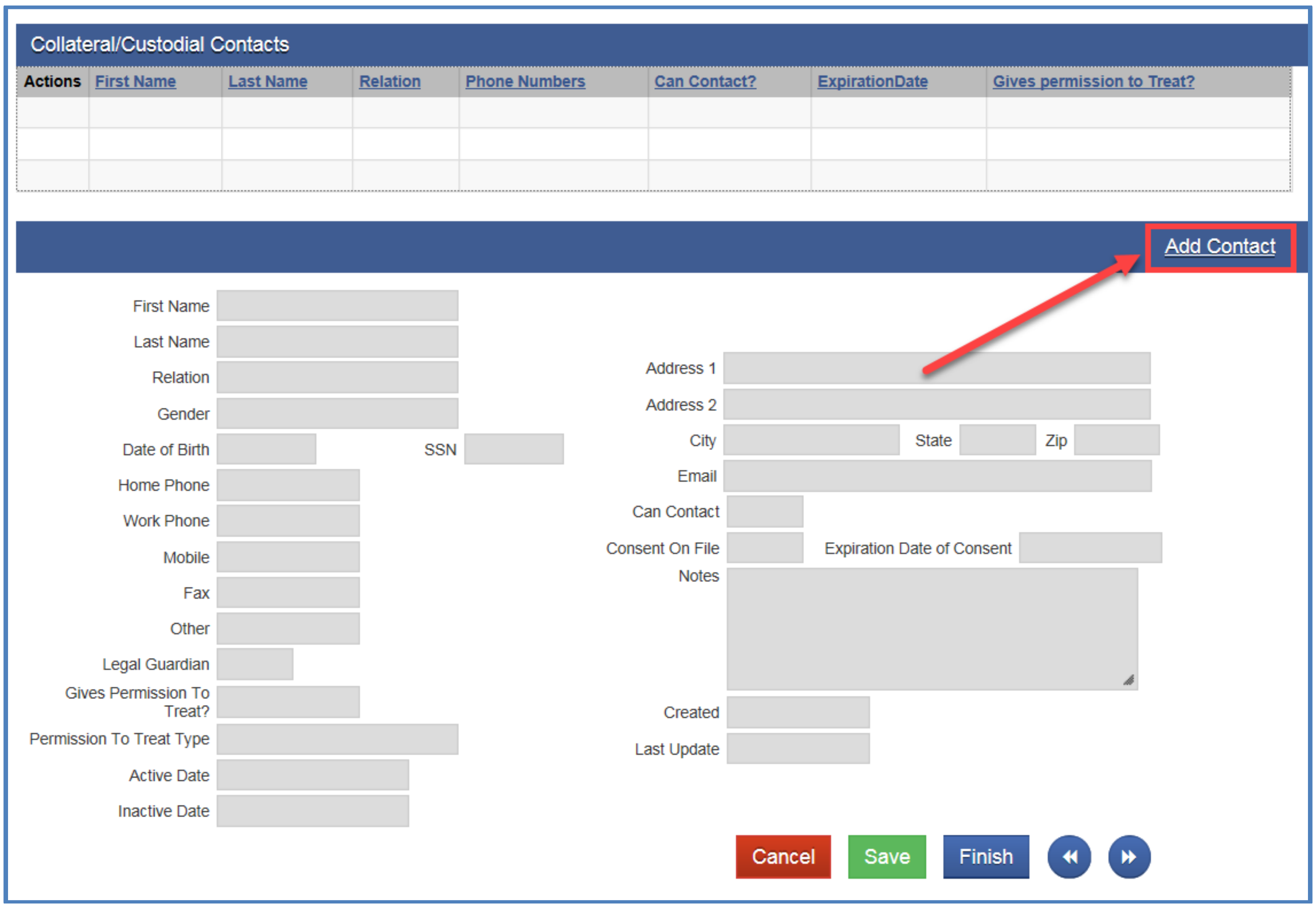
7. Click Edit to edit the address.



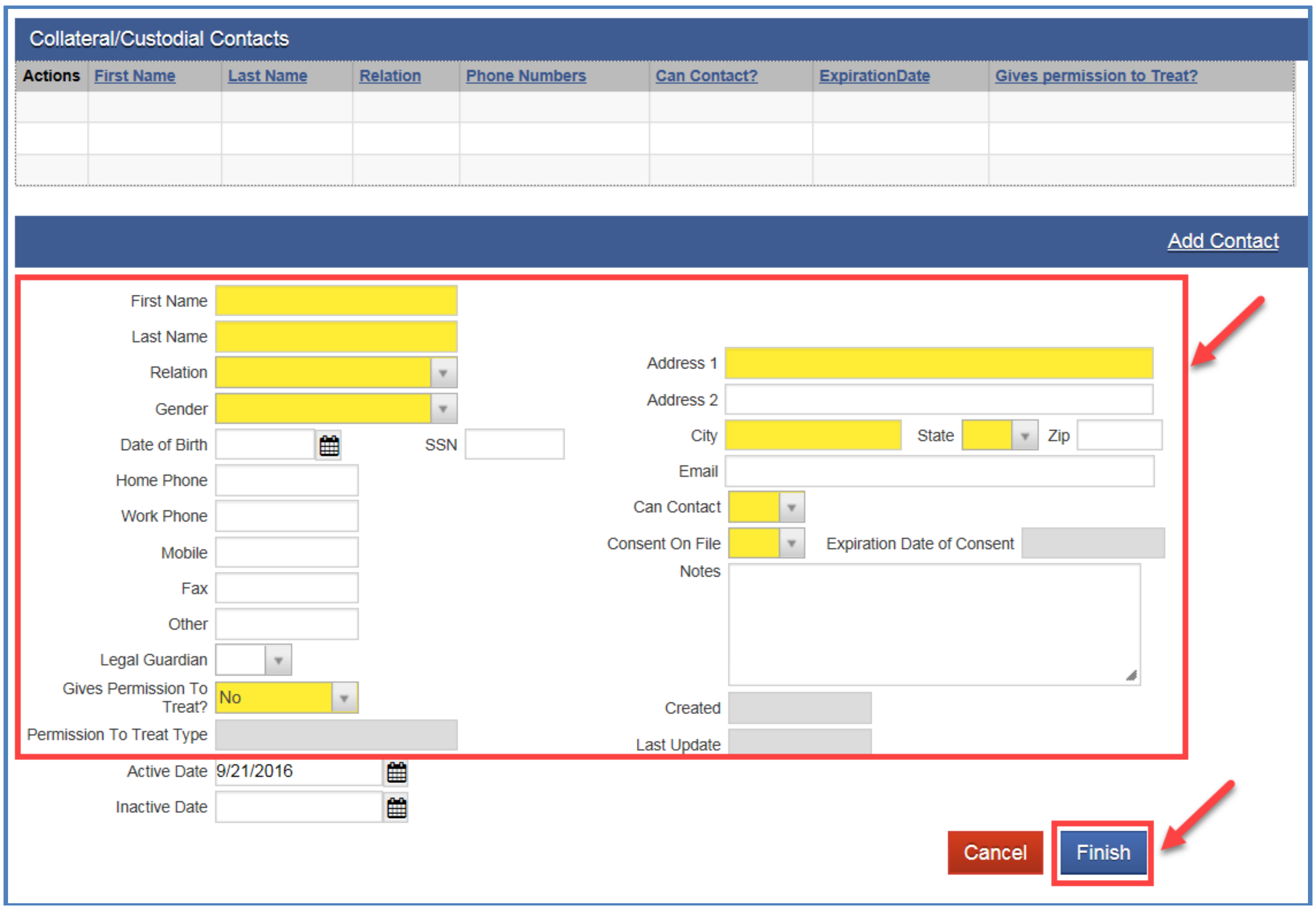
8. Click Save and  .

9. The Collateral/Custodial Contacts page will display.

Collateral/Custodial Contacts

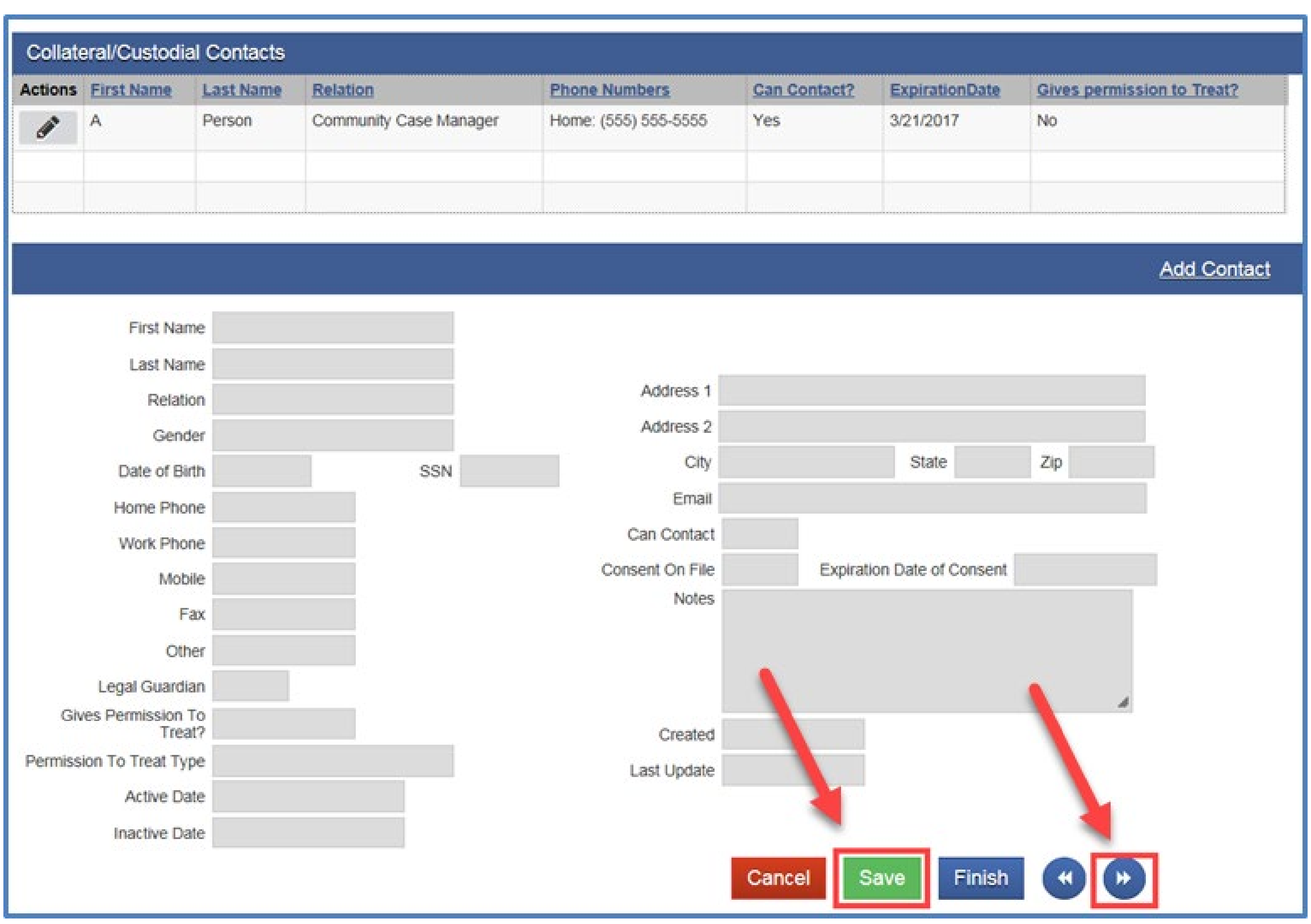


1. Click Add Contact.



2. Complete the following fields.
   - First Name – enter the first name.
   - Last Name – enter the last name.
   - Relation – select the relation to the client.
   - Gender – select the gender.
     - Female
     - Male
     - Refused
     - Transgender Female: person designated male at birth but identifies as female
     - Transgender Male: person designated female at birth but identifies as male
     - Unknown
   - Gives Permission to Treat – the field will populate with NO. Update as needed. This field indicates that permission to provide treatment is granted by someone other than the client.
   - Permission to Treat Type – select the type. This field is required if Gives Permission to Treat is YES.
   - Active Date – the field will populate with today's date. Update as needed.
   - Inactive Date – enter the date when this contact is no longer active.
   - Address Line 1 – enter the physical address.
   - City – enter the city.
   - State – enter the state.
   - Can Contact – select Yes or No. If Can Contact is YES, then Consent on File must also be YES.
   - Consent On File – the field will populate with NO. Update as needed.
   - Expiration Date of Consent – the field will populate with six months from today's date when the Consent on File is YES. Change to reflect the date on the paper Release of Information or use the date picker to select the date. This field will be Read Only if Gives Permission to Treat is YES.

3. Click Finish.

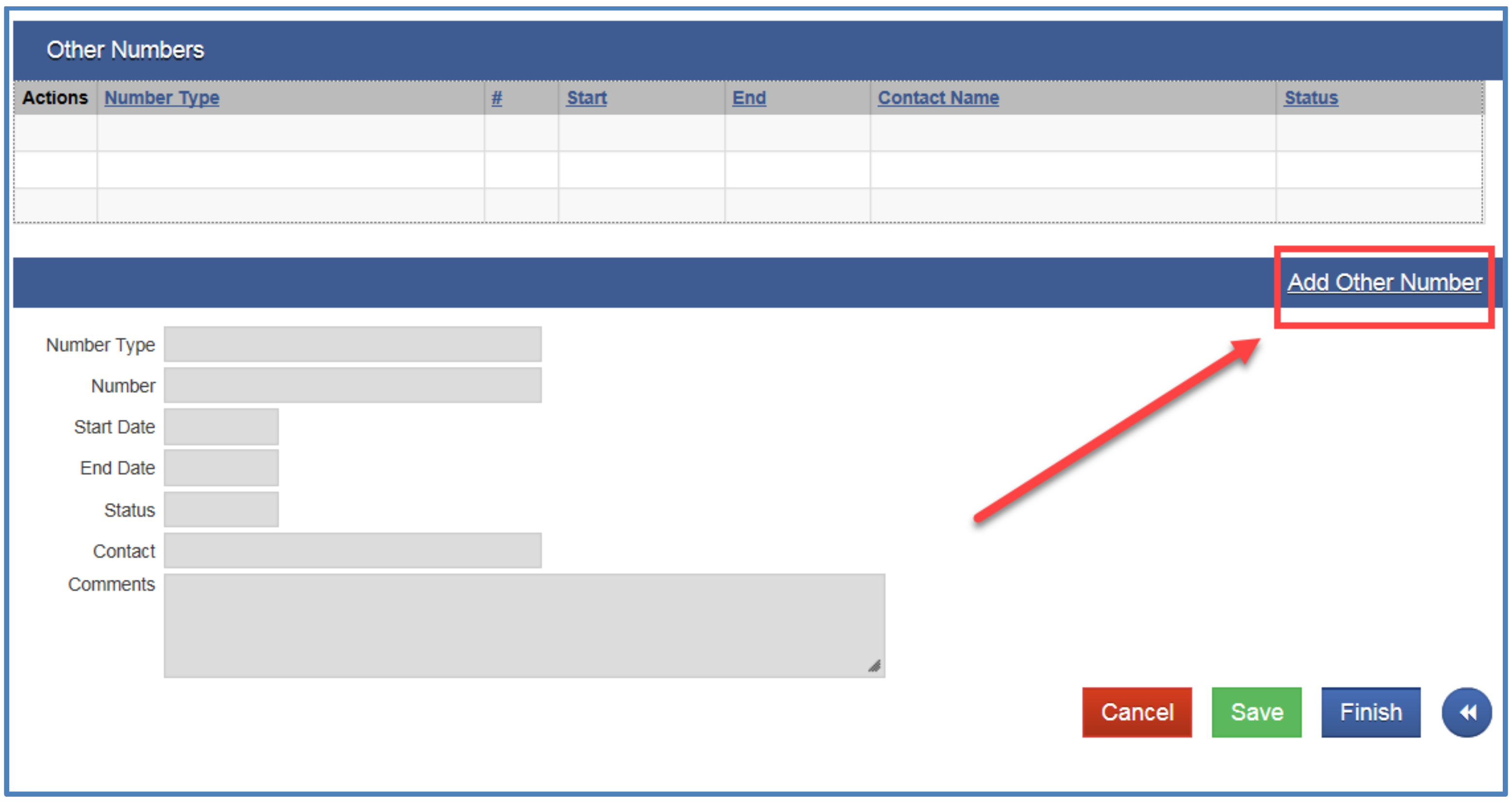


4. Click Save and .

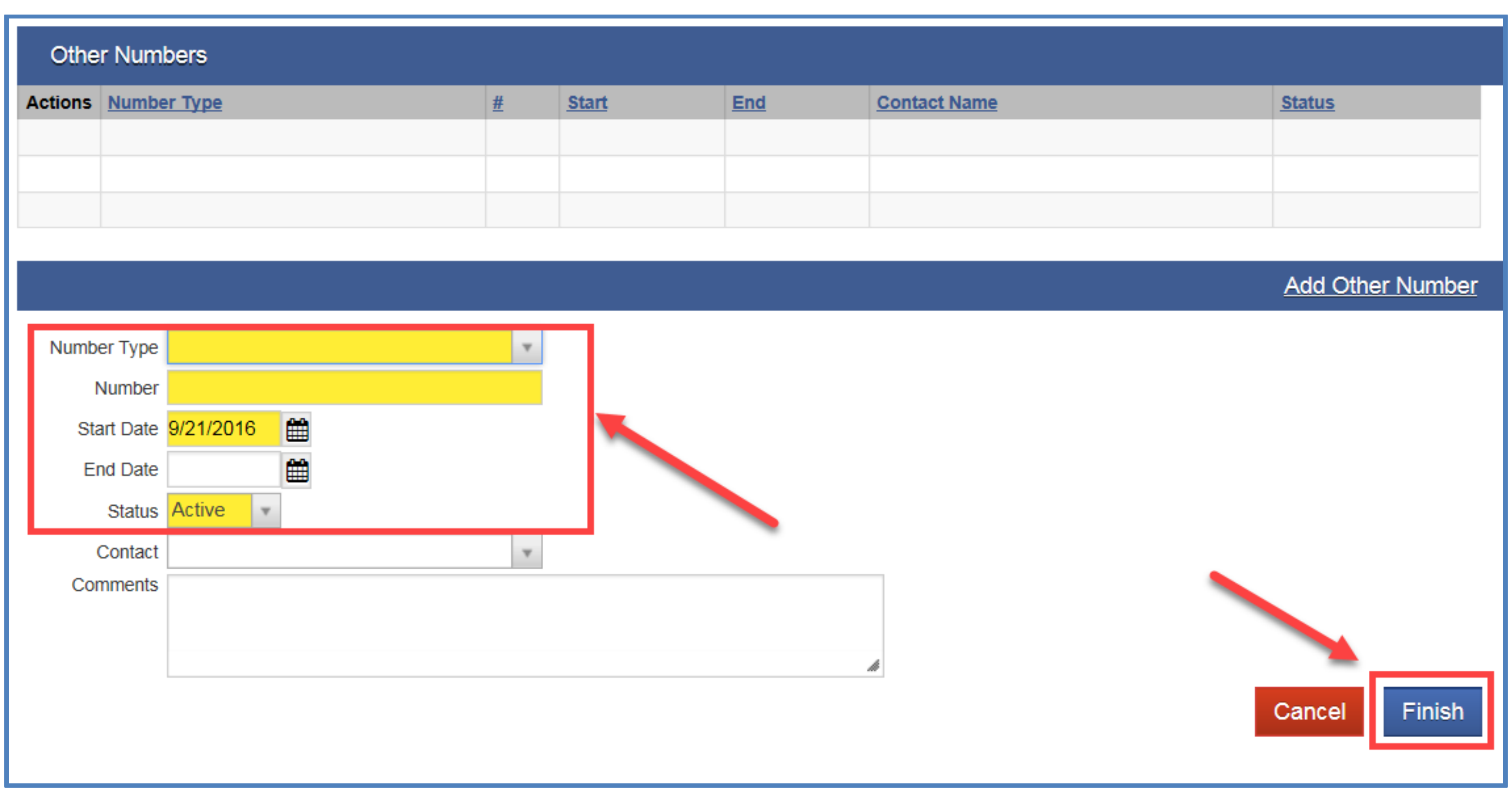
5. The Other Numbers page will display.

Other Numbers

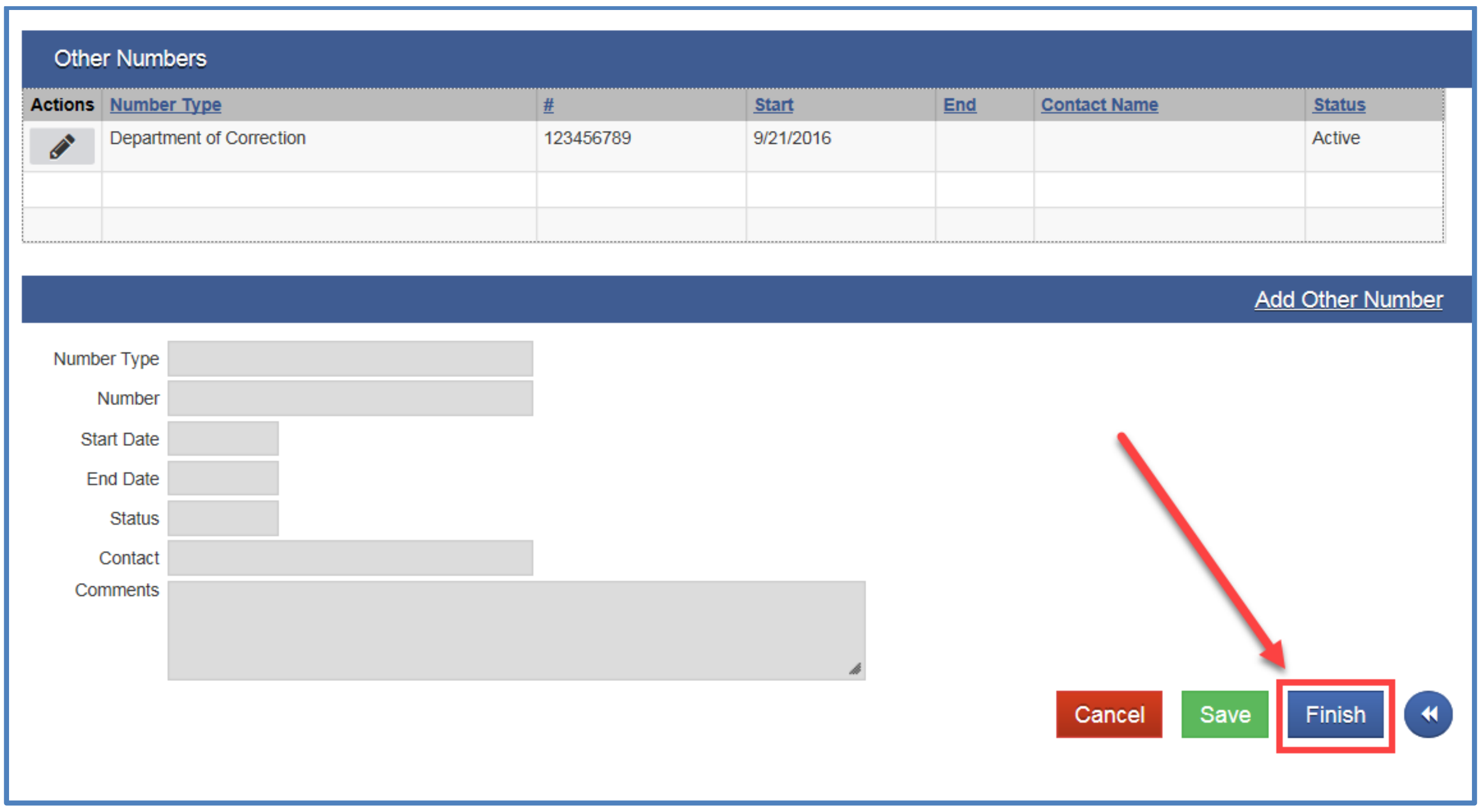
Other Numbers cannot be deleted once they have been used; however, entering an end date will inactivate them for future use in the system.



1. Click Add Other Number.



2. Complete the following fields.
   - Number Type – select the number type.
   - Number – enter the number.
   - Start Date – the field will populate with today's date. Update as needed.
   - Status – the field will populate with Active.
3. Click Finish.

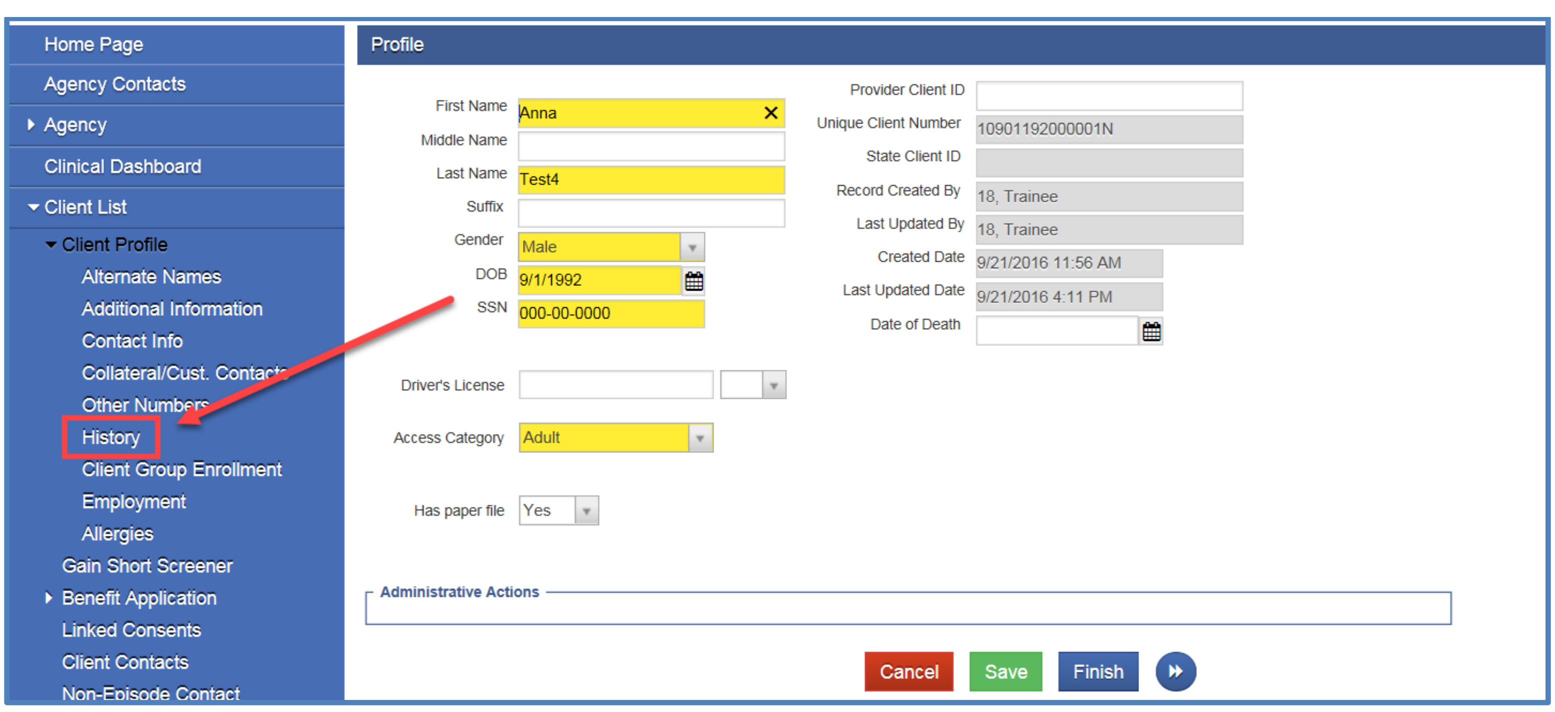


4. Click Finish.

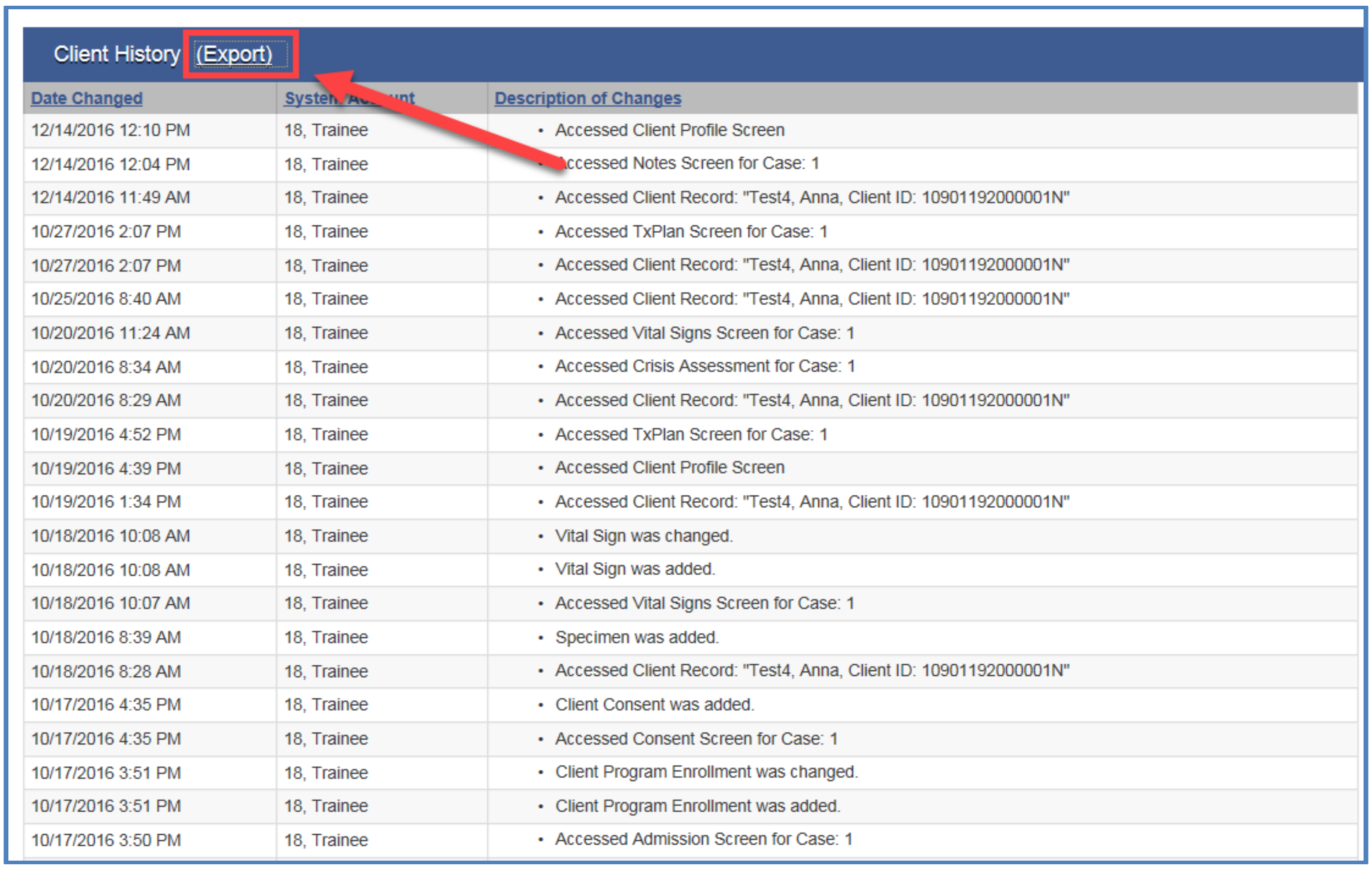
History (Informational Page)

Client History displays and exports a client's history (e.g. who has accessed the client record and what action they performed).

1. Begin on the Client Profile.



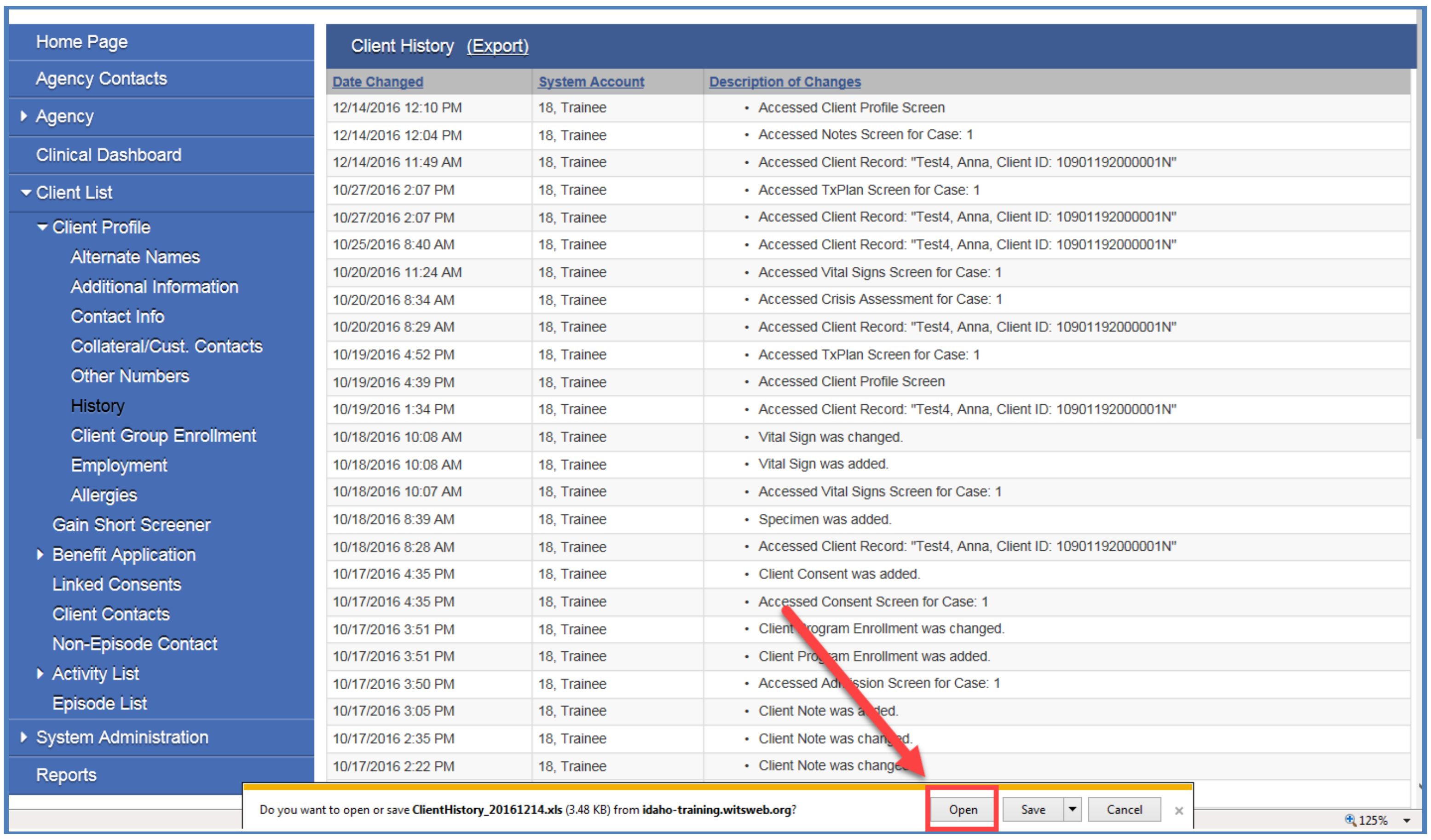
2. Click History on the blue navigation pane.



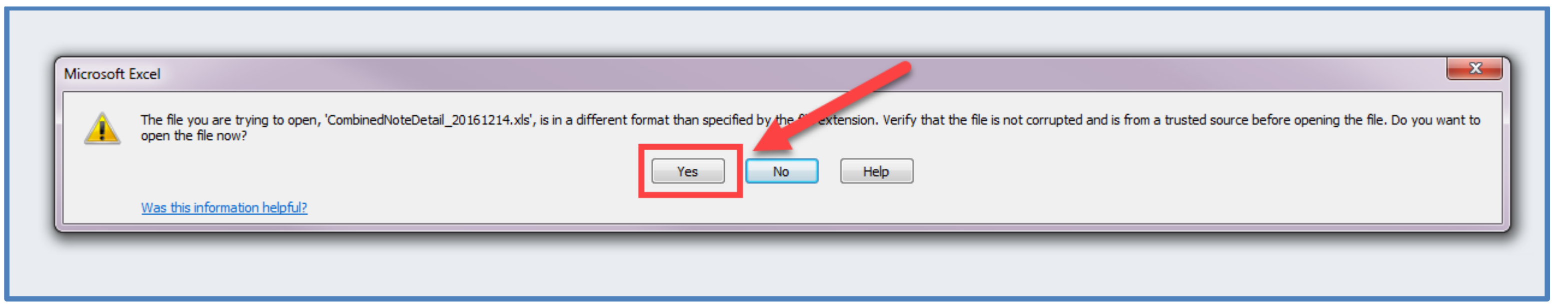
Client History (Export)

Date Changed	System Account	Description of Changes
12/14/2016 12:10 PM	18, Trainee	• Accessed Client Profile Screen
12/14/2016 12:04 PM	18, Trainee	• Accessed Notes Screen for Case: 1
12/14/2016 11:49 AM	18, Trainee	• Accessed Client Record: "Test4, Anna, Client ID: 10901192000001N"
10/27/2016 2:07 PM	18, Trainee	• Accessed TxPlan Screen for Case: 1
10/27/2016 2:07 PM	18, Trainee	• Accessed Client Record: "Test4, Anna, Client ID: 10901192000001N"
10/25/2016 8:40 AM	18, Trainee	• Accessed Client Record: "Test4, Anna, Client ID: 10901192000001N"
10/20/2016 11:24 AM	18, Trainee	• Accessed Vital Signs Screen for Case: 1
10/20/2016 8:34 AM	18, Trainee	• Accessed Crisis Assessment for Case: 1
10/20/2016 8:29 AM	18, Trainee	• Accessed Client Record: "Test4, Anna, Client ID: 10901192000001N"
10/19/2016 4:52 PM	18, Trainee	• Accessed TxPlan Screen for Case: 1
10/19/2016 4:39 PM	18, Trainee	• Accessed Client Profile Screen
10/19/2016 1:34 PM	18, Trainee	• Accessed Client Record: "Test4, Anna, Client ID: 10901192000001N"
10/18/2016 10:08 AM	18, Trainee	• Vital Sign was changed.
10/18/2016 10:08 AM	18, Trainee	• Vital Sign was added.
10/18/2016 10:07 AM	18, Trainee	• Accessed Vital Signs Screen for Case: 1
10/18/2016 8:39 AM	18, Trainee	• Specimen was added.
10/18/2016 8:28 AM	18, Trainee	• Accessed Client Record: "Test4, Anna, Client ID: 10901192000001N"
10/17/2016 4:35 PM	18, Trainee	• Client Consent was added.
10/17/2016 4:35 PM	18, Trainee	• Accessed Consent Screen for Case: 1
10/17/2016 3:51 PM	18, Trainee	• Client Program Enrollment was changed.
10/17/2016 3:51 PM	18, Trainee	• Client Program Enrollment was added.
10/17/2016 3:50 PM	18, Trainee	• Accessed Admission Screen for Case: 1

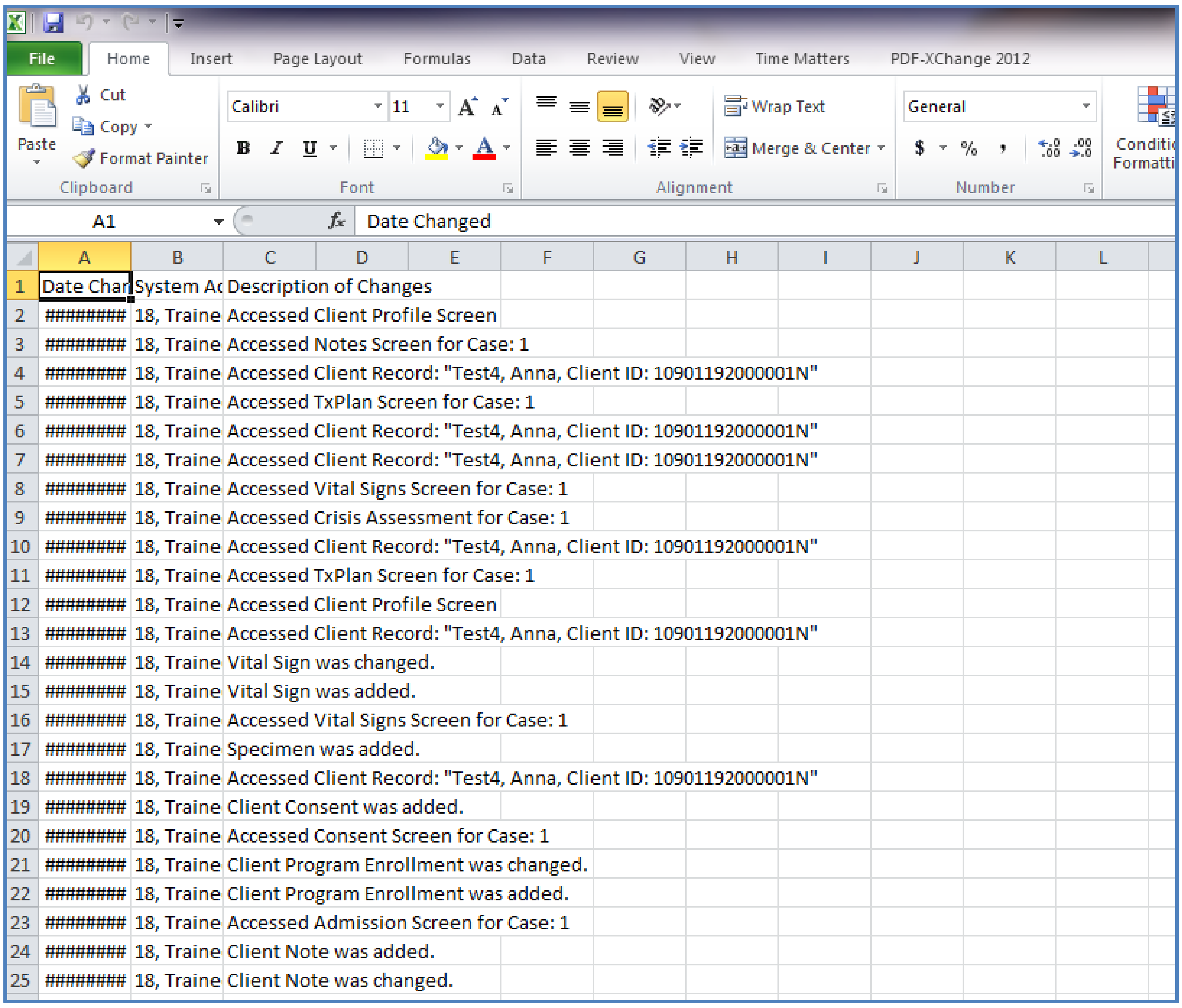
3. The history for the client record is displayed. Export it to Excel by clicking (Export).



4. Click Open.



5. If the warning message above displays, click Yes.



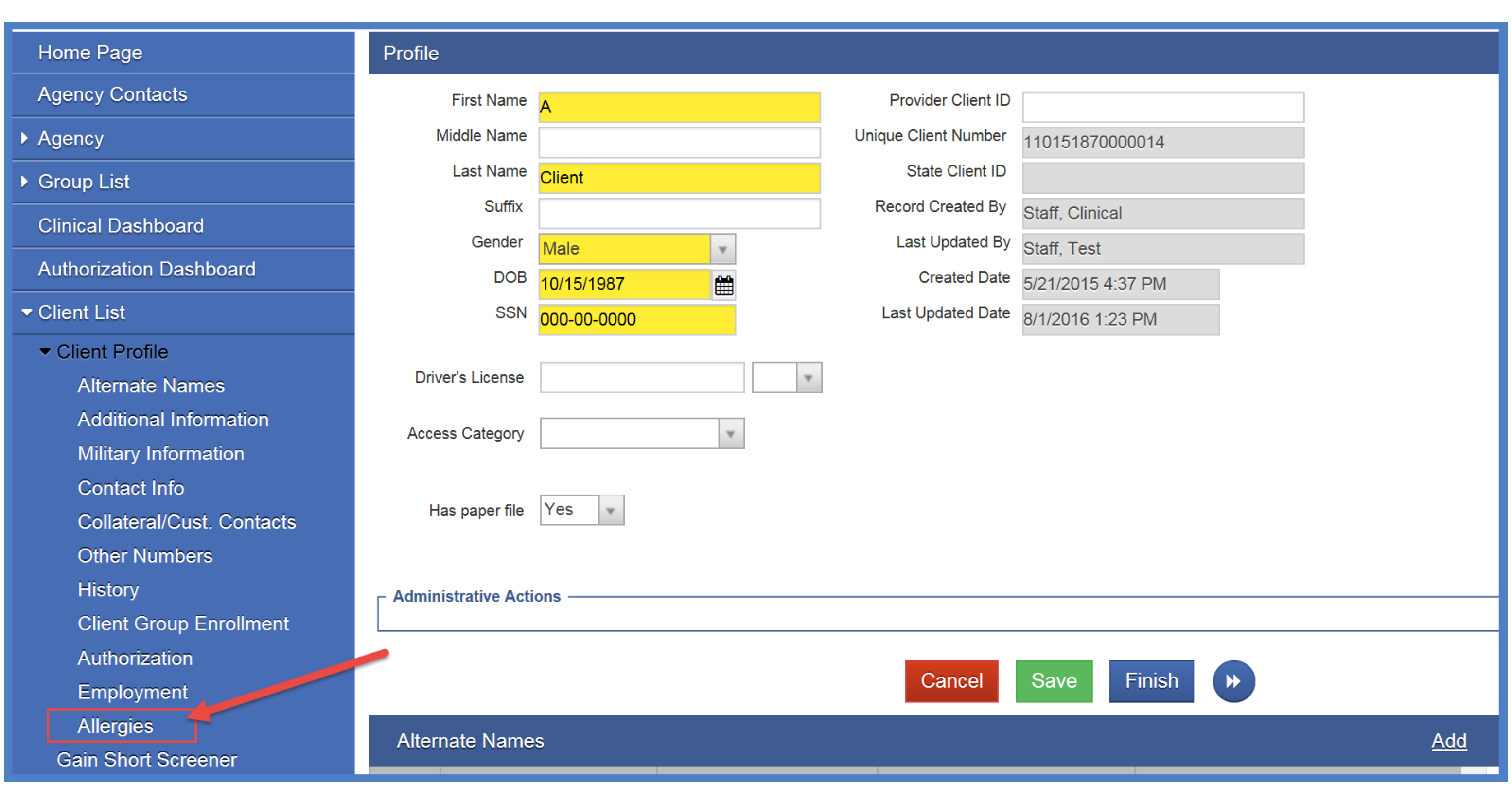
	A	B	C
1	Date Char	System Ac	Description of Changes
2	########	18, Traine	Accessed Client Profile Screen
3	########	18, Traine	Accessed Notes Screen for Case: 1
4	########	18, Traine	Accessed Client Record: "Test4, Anna, Client ID: 1090119200001N"
5	########	18, Traine	Accessed TxPlan Screen for Case: 1
6	########	18, Traine	Accessed Client Record: "Test4, Anna, Client ID: 1090119200001N"
7	########	18, Traine	Accessed Client Record: "Test4, Anna, Client ID: 1090119200001N"
8	########	18, Traine	Accessed Vital Signs Screen for Case: 1
9	########	18, Traine	Accessed Crisis Assessment for Case: 1
10	########	18, Traine	Accessed Client Record: "Test4, Anna, Client ID: 1090119200001N"
11	########	18, Traine	Accessed TxPlan Screen for Case: 1
12	########	18, Traine	Accessed Client Profile Screen
13	########	18, Traine	Accessed Client Record: "Test4, Anna, Client ID: 1090119200001N"
14	########	18, Traine	Vital Sign was changed.
15	########	18, Traine	Vital Sign was added.
16	########	18, Traine	Accessed Vital Signs Screen for Case: 1
17	########	18, Traine	Specimen was added.
18	########	18, Traine	Accessed Client Record: "Test4, Anna, Client ID: 1090119200001N"
19	########	18, Traine	Client Consent was added.
20	########	18, Traine	Accessed Consent Screen for Case: 1
21	########	18, Traine	Client Program Enrollment was changed.
22	########	18, Traine	Client Program Enrollment was added.
23	########	18, Traine	Accessed Admission Screen for Case: 1
24	########	18, Traine	Client Note was added.
25	########	18, Traine	Client Note was changed.

6. The Client History displays in Excel.

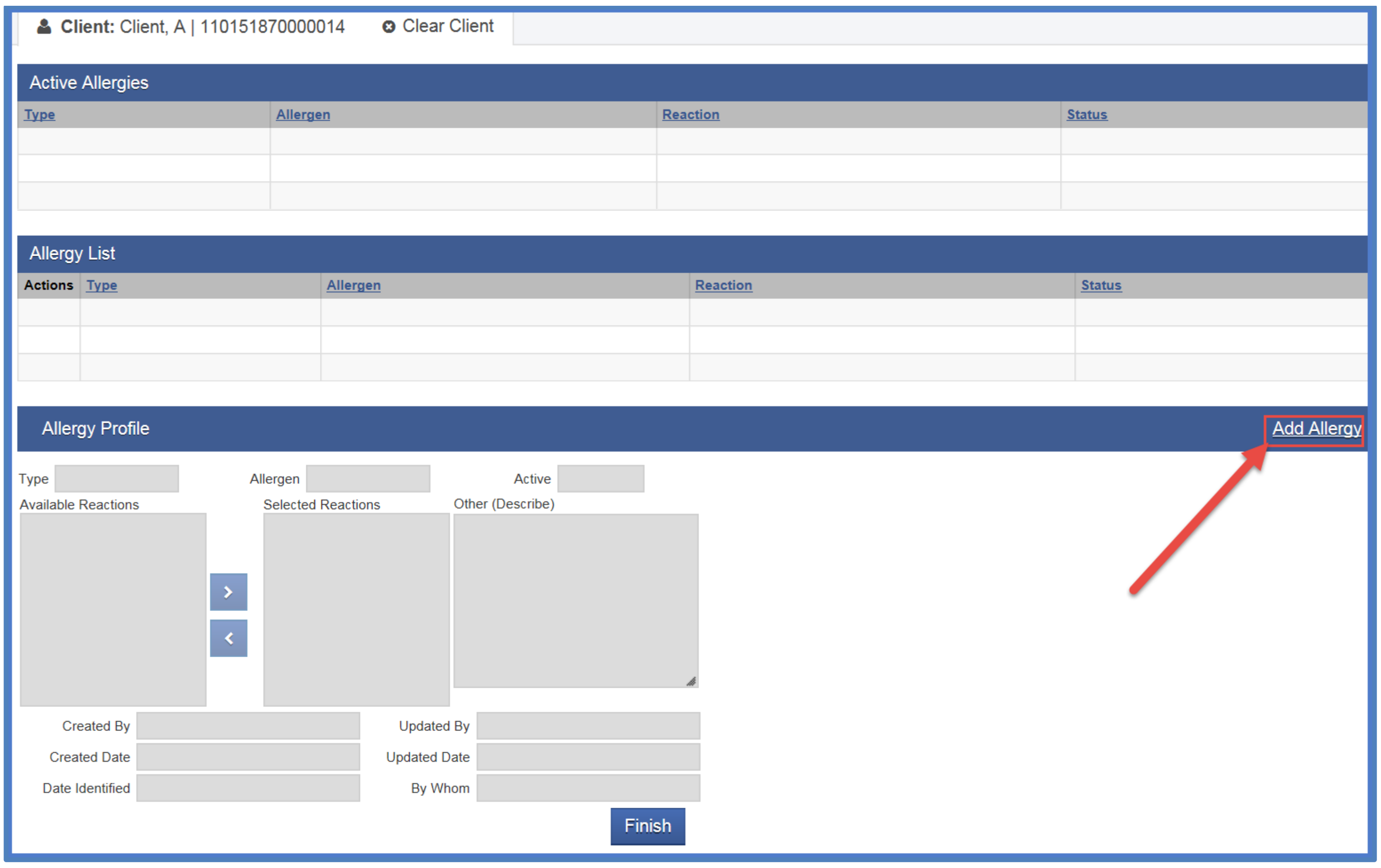
Allergies

The Allergies page tracks the client's allergies during an episode of care. The Active Allergy list displays only the active allergies. The Allergy List displays active and inactive allergies.

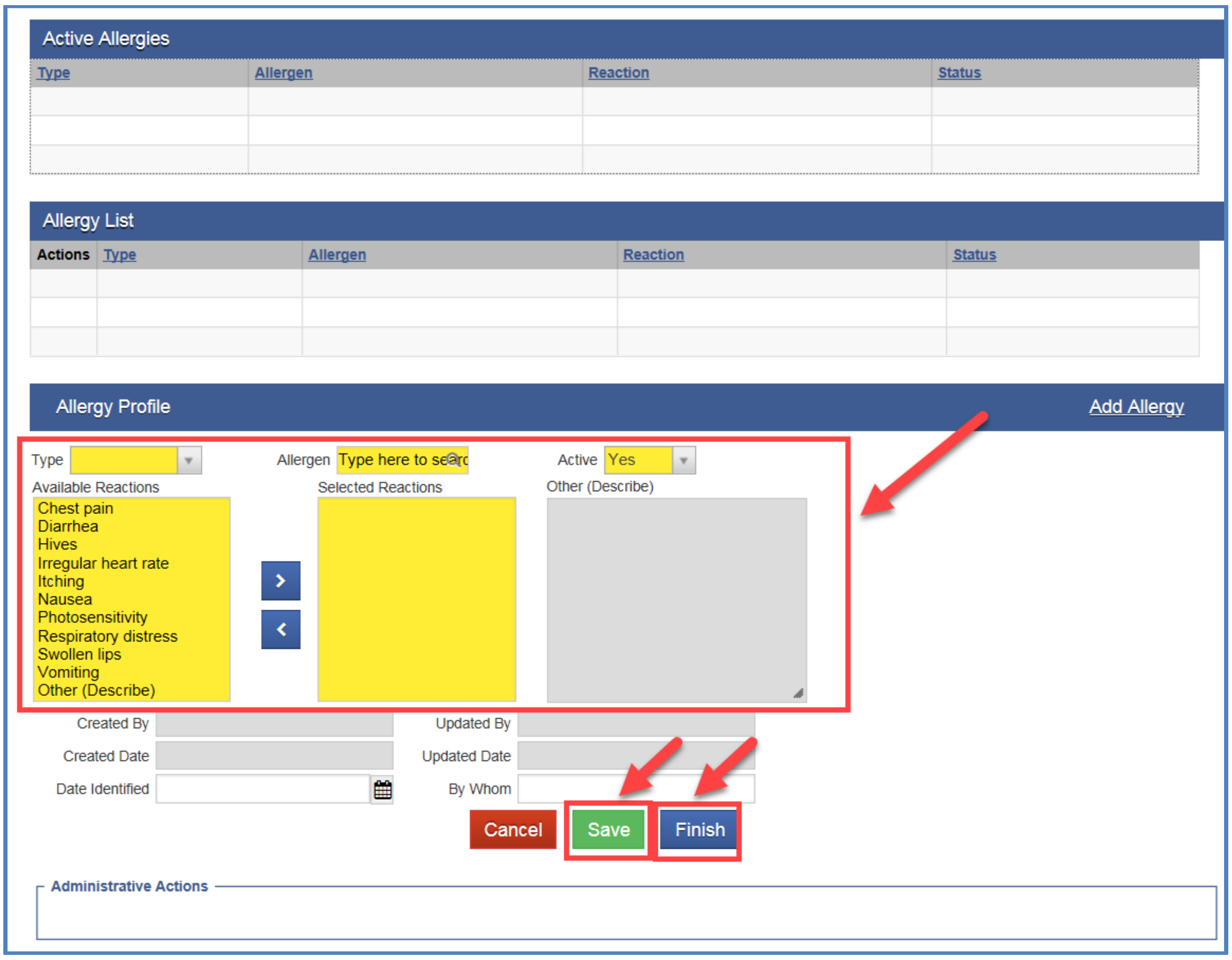
1. Begin on the Client Profile.



2. Click Allergies on the blue navigation pane.



3. Click. Add Allergy.



4. Complete the following fields.
   - Type – select the type of allergy.
   - Allergen – select the allergen.
   - Active – the field will populate with Yes. Update as needed.
   - Available Reactions – select all applicable reactions and move to Selected Reactions.

5. Click Save and Finish.

Crisis Evaluation

Purpose: The Crisis Evaluation captures clinical information about the client each time they come to a BHCCC.

This is a required section for all clients who come into the BHCCC. Once it is started it should remain in the status of In Progress until the client is leaving the BHCCC when it will be completed.

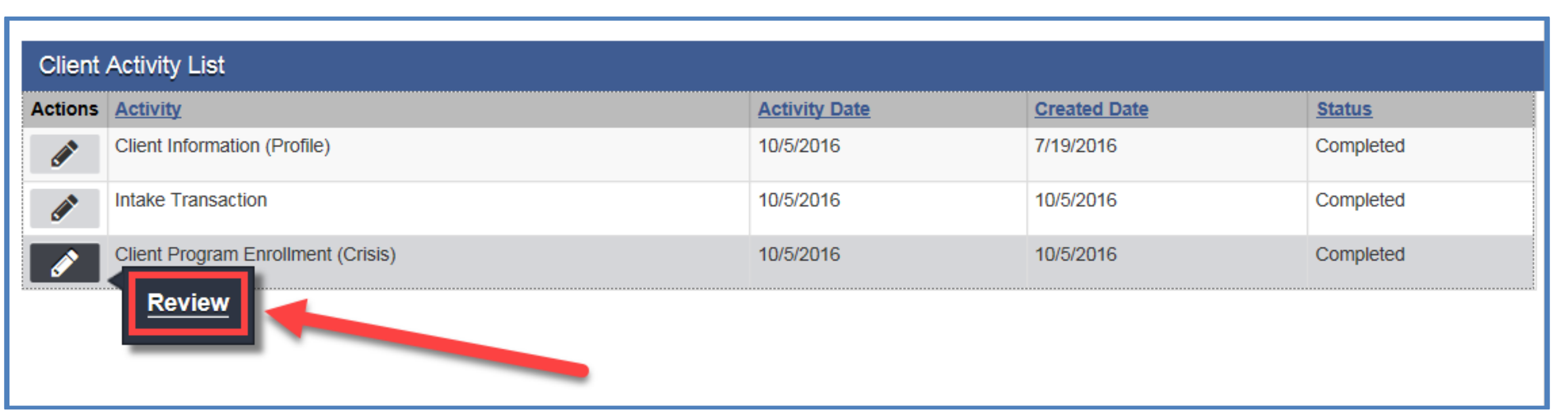
Only one Crisis Evaluation is allowed in each episode of care. Each time a client comes into the BHCCC create a new Intake and a new Crisis Evaluation. For example, if a client comes to the BHCCC at 4:00 AM and leaves at 1:00 PM on 1/20/17 (this is one Intake and one Crisis Evaluation) and then returns to the BHCCC at 6:00 PM on 1/20/17 (this is separate Intake and Crisis Evaluation) so the client will have two episodes (Intakes) on 1/20/17.

Creating a Crisis Evaluation from the Client Activity List

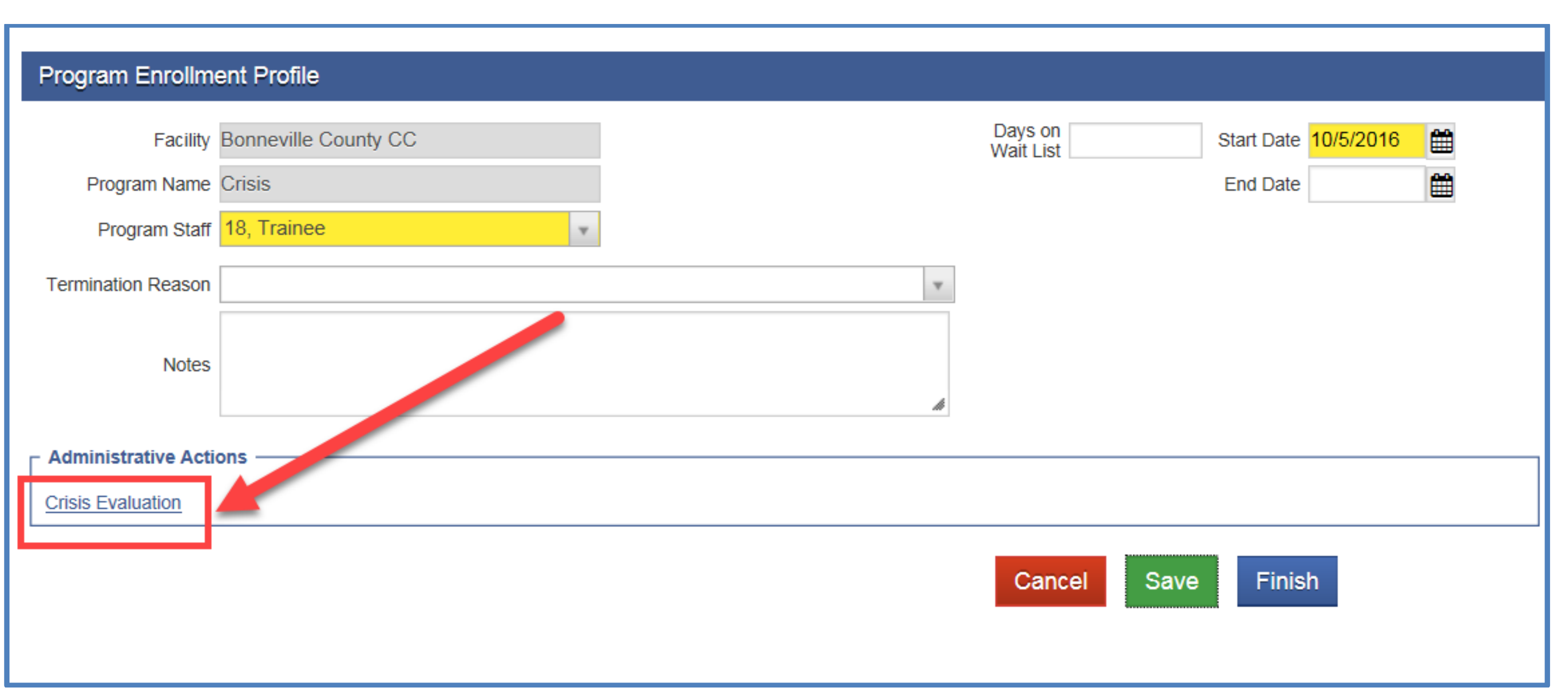
Before the Crisis Evaluation can be created there must be a Crisis Program Enrollment in the episode.

Only one Crisis Evaluation is allowed in each episode of care. Each time a client comes into the BHCCC create a new Intake and a new Crisis Evaluation. For example, if a client comes to the BHCCC at 4:00 AM and leaves at 1:00 PM on 1/20/17 (this is one Intake and one Crisis Evaluation) and then returns to the BHCCC at 6:00 PM on 1/20/17 (this is separate Intake and Crisis Evaluation) so the client will have two episodes (Intakes) on 1/20/17.

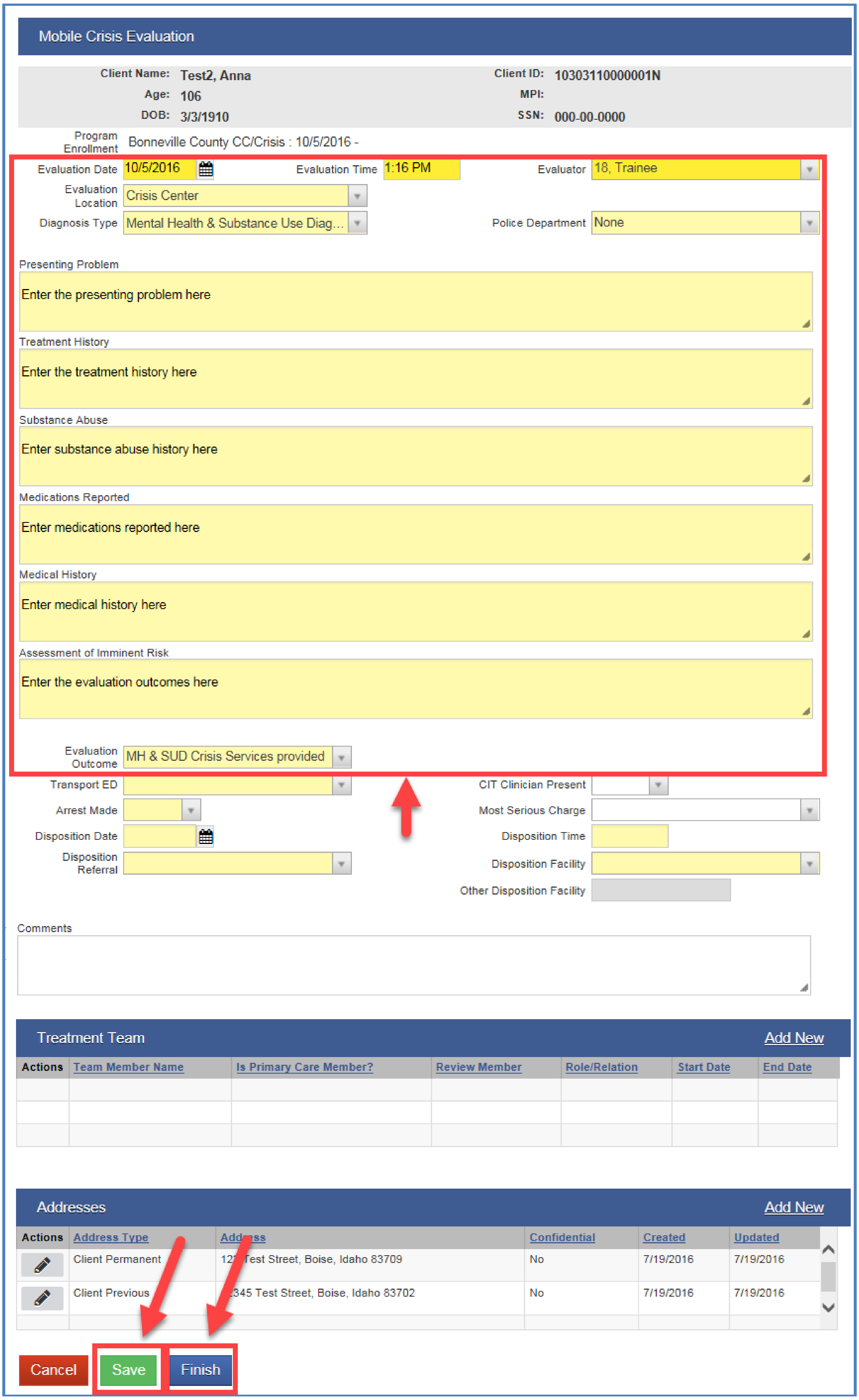
1. Begin on the Client Activity List.



2. Once you're on the Client Activity List, hover over the ✎ and click **Review** under Actions for the Crisis Program Enrollment.

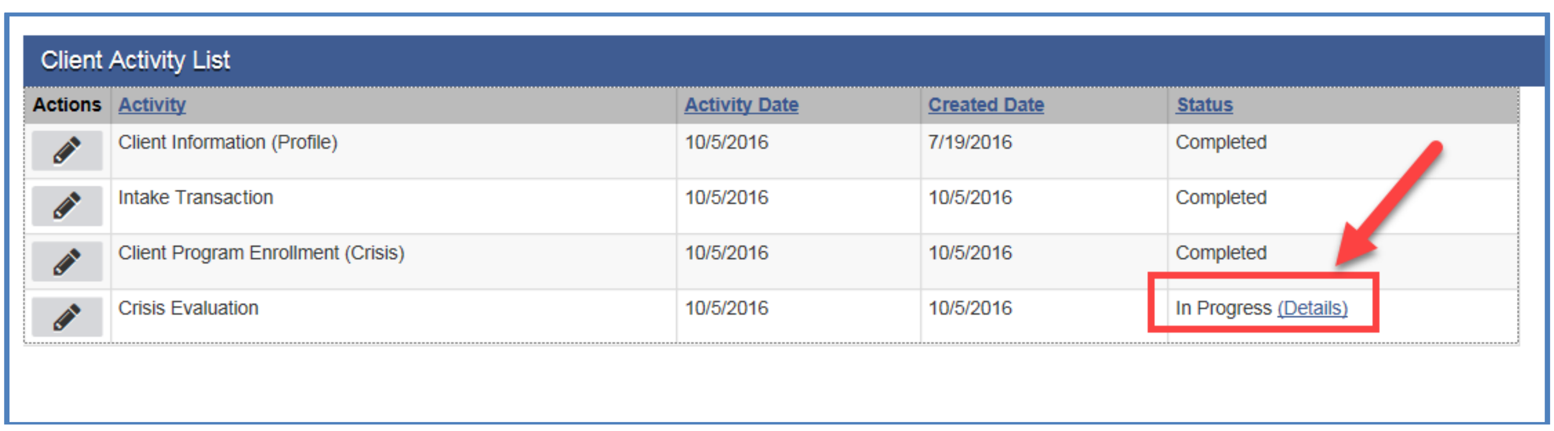


3. Click Crisis Evaluation under Administrative Actions.


Mobile Crisis Evaluation
Client Name: Test2, Anna
Age: 106
DOB: 3/3/1910
Client ID: 10303110000001N
MPI:
SSN: 000-00-0000
Program Enrollment Bonneville County CC/Crisis : 10/5/2016 -
Evaluation Date 10/5/2016
Evaluation Time 1:16 PM
Evaluator 18, Trainee
Evaluation Location Crisis Center
Diagnosis Type Mental Health & Substance Use Diag...
Police Department None
Presenting Problem
Enter the presenting problem here
Treatment History
Enter the treatment history here
Substance Abuse
Enter substance abuse history here
Medications Reported
Enter medications reported here
Medical History
Enter medical history here
Assessment of Imminent Risk
Enter the evaluation outcomes here
Evaluation Outcome MH & SUD Crisis Services provided
Transport ED
CIT Clinician Present
Arrest Made
Most Serious Charge
Disposition Date
Disposition Time
Disposition Referral
Disposition Facility
Other Disposition Facility
Comments
Treatment Team
Add New
Actions
Team Member Name
Is Primary Care Member?
Review Member
Role/Relation
Start Date
End Date
Addresses
Add New
Actions
Address Type
Address
Confidential
Created
Updated
Client Permanent
123 Test Street, Boise, Idaho 83709
No
7/19/2016
7/19/2016
Client Previous
2345 Test Street, Boise, Idaho 83702
No
7/19/2016
7/19/2016
Cancel
Save
Finish

4. Complete the following fields.
    - Evaluation Date – the field will populate with today's date. **Update to the start date for the client at the BHCCC.**
    - Evaluation Time– the field will populate with the time the record is created. **Update to the start time for the client at the BHCCC.**
    - Evaluator – the field will populate with the name of the person creating the Crisis Evaluation. Update as needed.
    - Evaluation Location – select Crisis Center.
    - Diagnosis Type – **select the diagnosis type after the evaluation is complete**.
    - Police Department – select the involved police department or N/A when the client comes to the BHCCC.
    - Presenting Problem – enter presenting problem.
    - Treatment History – enter treatment history.
    - Substance Abuse – enter substance abuse history.
    - Medication Reported – enter mediation reported.
    - Medical History – enter medical history.
    - Assessment of Imminent Risk – **enter the evaluation outcomes.**
    - Evaluation Outcome – select the outcome of the evaluation.

5. Click Save and Finish.



Client Activity List

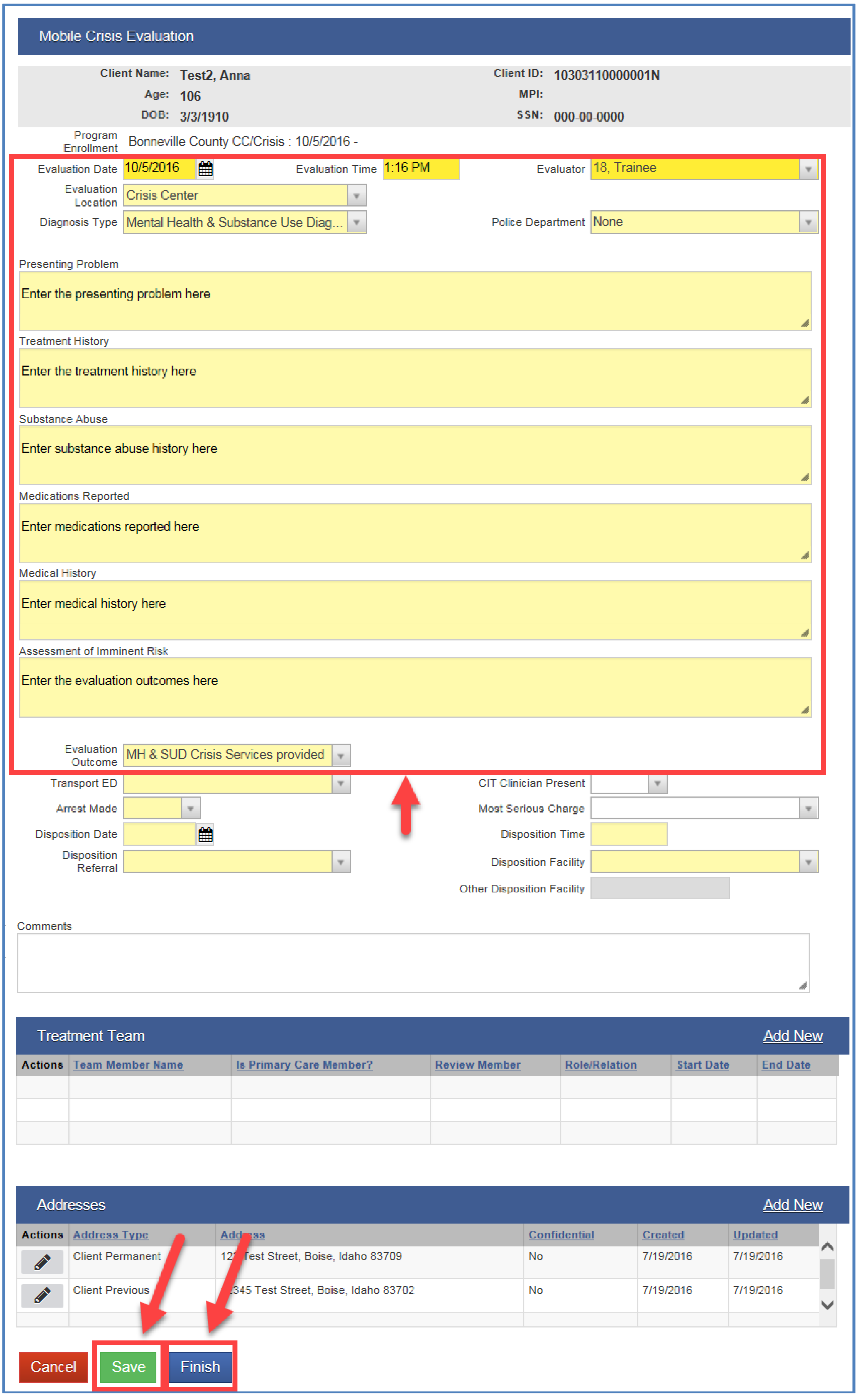
Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	10/5/2016	7/19/2016	Completed
	Intake Transaction	10/5/2016	10/5/2016	Completed
	Client Program Enrollment (Crisis)	10/5/2016	10/5/2016	Completed
	Crisis Evaluation	10/5/2016	10/5/2016	In Progress (Details)

6. The Crisis Evaluation will stay in the status of In Progress until the client is leaving the BHCCC. The status can be seen from the Activity List.

7. Complete the Crisis Evaluation when the client is leaving the BHCCC. when the client is leaving the BHCCC.

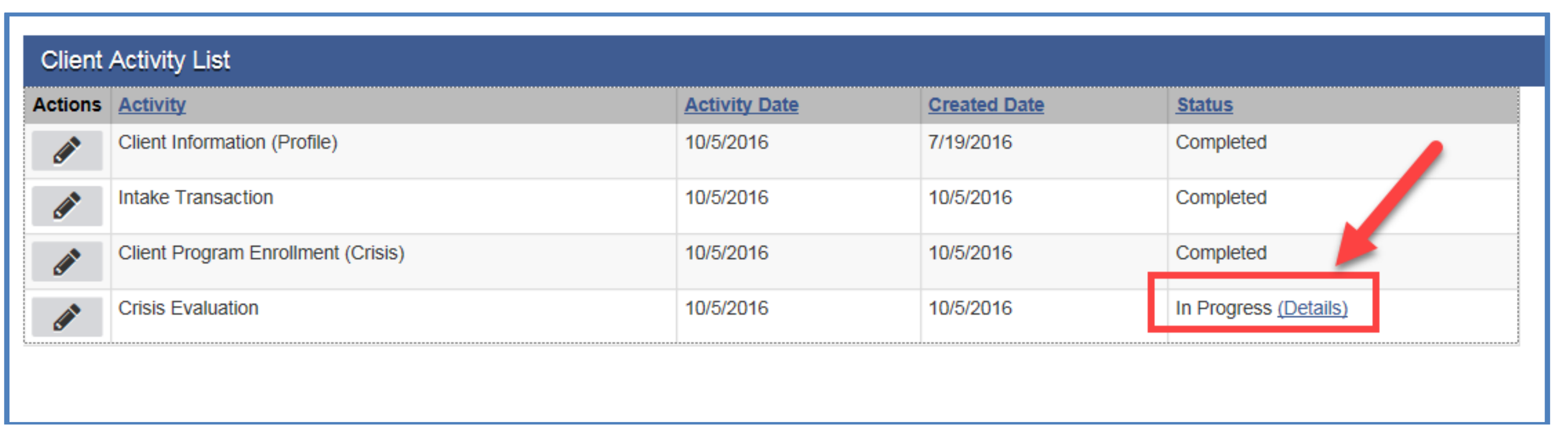
Completing the Crisis Evaluation from the Program Enrollment

1. After creating the Crisis Program Enrollment, WITS will automatically navigate you to the Crisis Evaluation.



2. Complete the following fields.
   - Evaluation Date – the field will populate with today's date. **Update to the start date for the client at the BHCCC.**
   - Evaluation Time– the field will populate with the time the record is created. **Update to the start time for the client at the BHCCC.**
   - Evaluator – the field will populate with the name of the person creating the Crisis Evaluation. Update as needed.
   - Evaluation Location – select Crisis Center.
   - Diagnosis Type – **select the diagnosis type after the evaluation is complete**.
   - Police Department – select the involved police department or N/A when the client comes to the BHCCC.
   - Presenting Problem – enter presenting problem.
   - Treatment History – enter treatment history.
   - Substance Abuse – enter substance abuse history.
   - Medication Reported – enter mediation reported.
   - Medical History – enter medical history.
   - Assessment of Imminent Risk – **enter the evaluation outcomes.**
   - Evaluation Outcome – select the outcome of the evaluation.

3. Click Save and Finish.

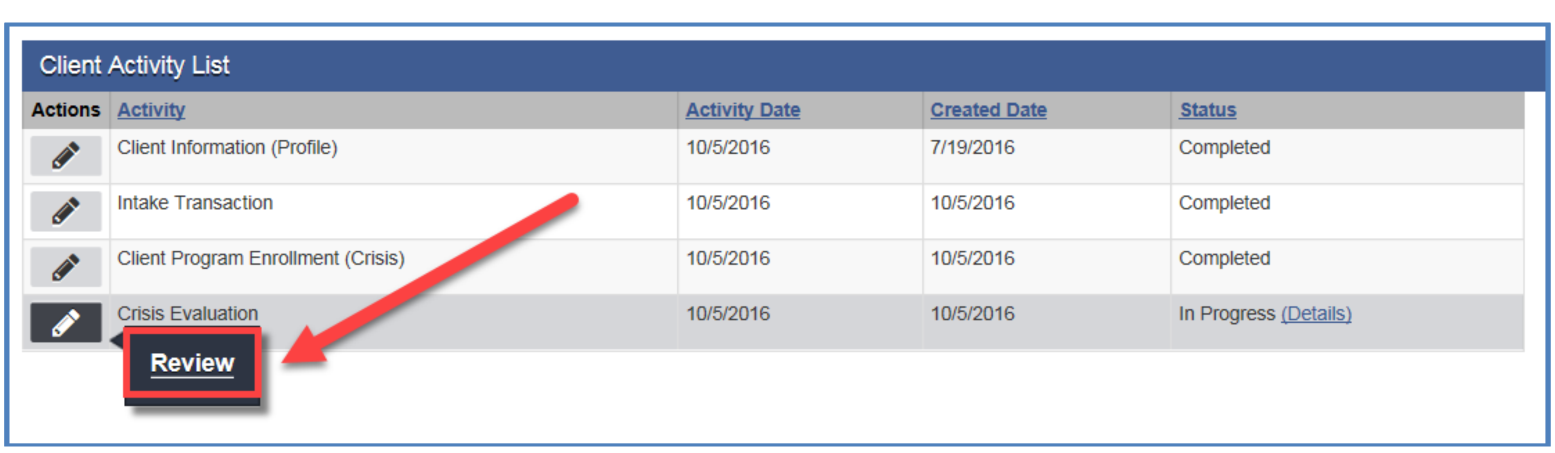


4. The Crisis Evaluation will stay in the status of In Progress until the client is leaving the BHCCC. The status can be seen from the Activity List.

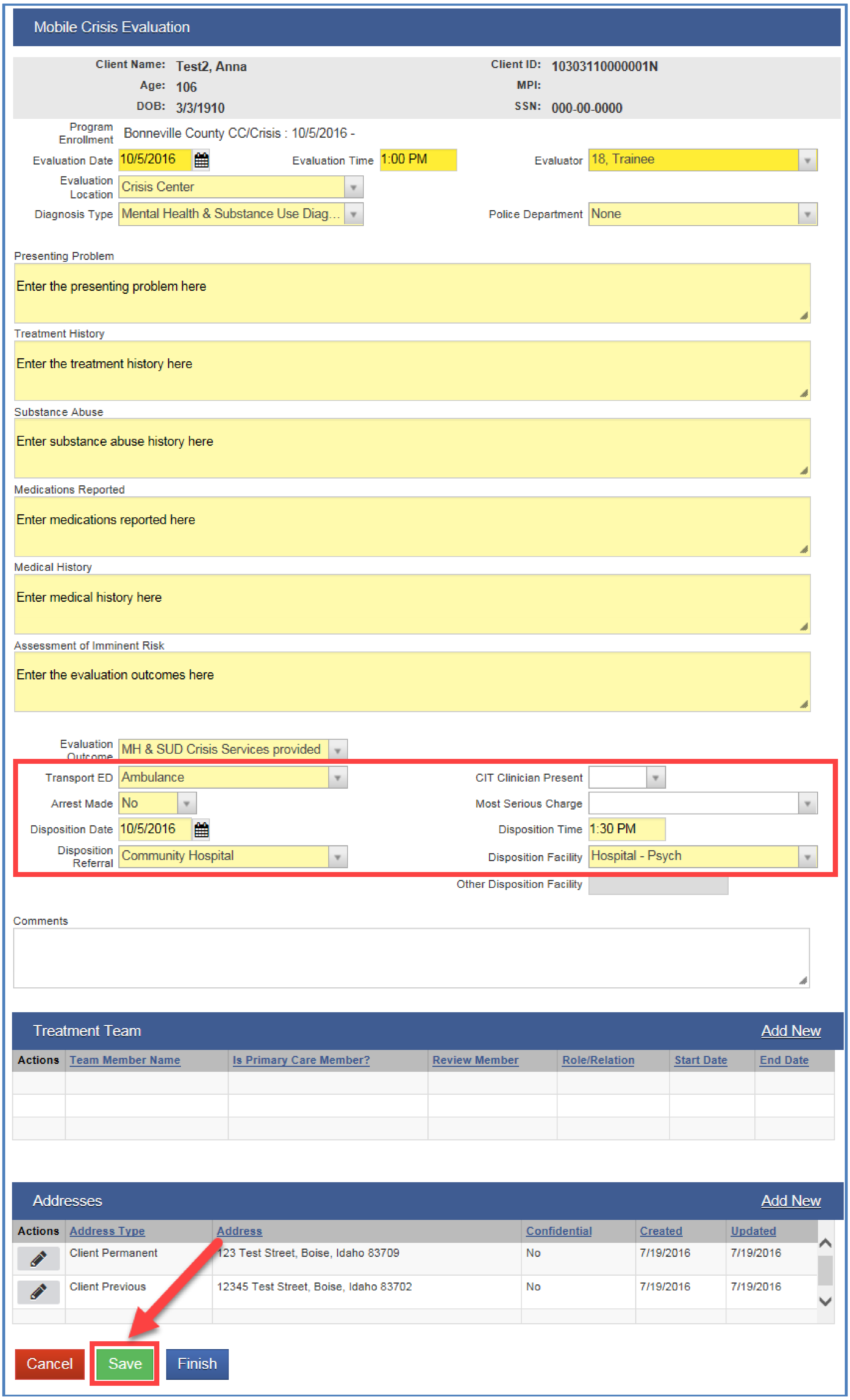
5. Complete the Crisis Evaluation when the client is leaving the BHCCC when the client is leaving the BHCCC.

Completing the Crisis Evaluation when the client is leaving the BHCCC.

1. Begin on the Client Activity List.



2. Once you're on the Client Activity List, hover over the ✎ and click **Review** under Actions for the Crisis Evaluation.



Mobile Crisis Evaluation

Client Name: Test2, Anna
Age: 106
DOB: 3/3/1910
Client ID: 10303110000001N
MPI:
SSN: 000-00-0000

Program Enrollment: Bonneville County CC/Crisis : 10/5/2016 -
Evaluation Date: 10/5/2016 | Evaluation Time: 1:00 PM | Evaluator: 18, Trainee
Evaluation Location: Crisis Center
Diagnosis Type: Mental Health & Substance Use Diag... | Police Department: None

Presenting Problem: Enter the presenting problem here
Treatment History: Enter the treatment history here
Substance Abuse: Enter substance abuse history here
Medications Reported: Enter medications reported here
Medical History: Enter medical history here
Assessment of Imminent Risk: Enter the evaluation outcomes here

Evaluation Outcome: MH & SUD Crisis Services provided
Transport ED: Ambulance | CIT Clinician Present:
Arrest Made: No | Most Serious Charge:
Disposition Date: 10/5/2016 | Disposition Time: 1:30 PM
Disposition Referral: Community Hospital | Disposition Facility: Hospital - Psych
Other Disposition Facility:

Comments

Treatment Team — Add New

Actions	Team Member Name	Is Primary Care Member?	Review Member	Role/Relation	Start Date	End Date

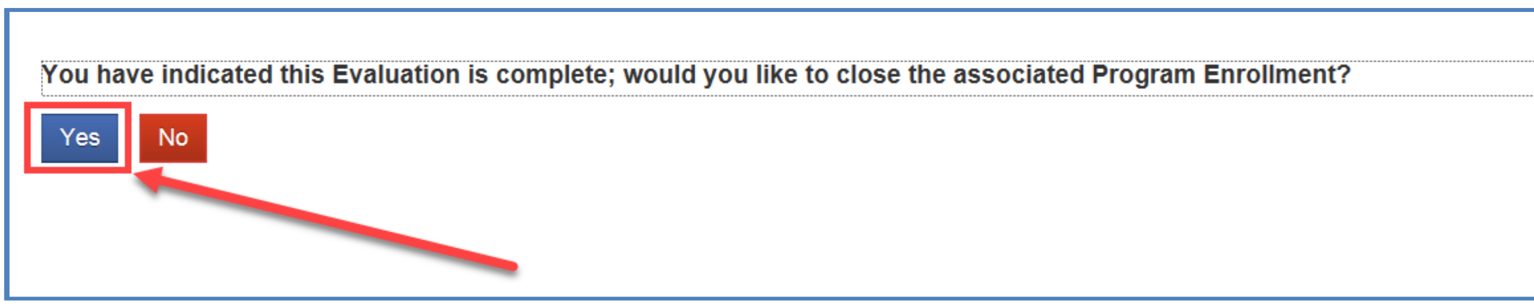
Addresses — Add New

Actions	Address Type	Address	Confidential	Created	Updated
	Client Permanent	123 Test Street, Boise, Idaho 83709	No	7/19/2016	7/19/2016
	Client Previous	12345 Test Street, Boise, Idaho 83702	No	7/19/2016	7/19/2016

Cancel | Save | Finish

3. Complete the following fields.
   - Transport ED – select the method of transportation of the client when the client is leaving the BHCCC.
   - Arrest Made – select Yes or No (was the client arrested when leaving the BHCCC).
   - Most Serious Charge – select the type of charge if an arrest was made when the client is leaving the BHCCC.
   - Disposition Date – enter date the client is leaving the BHCCC.
   - Disposition Time – enter the time the client is leaving the BHCCC as HH:MM.
   - Disposition Referral – select the Referral type.
   - Disposition Facility – select the location where the client is going when leaving the BHCCC.

4. Click Save.



5. Click Yes to close the Crisis Program Enrollment or click No to cancel. If you select Yes follow the instructions for Closing a Crisis Program Enrollment from the Crisis Evaluation from the Crisis Evaluation.

Consent

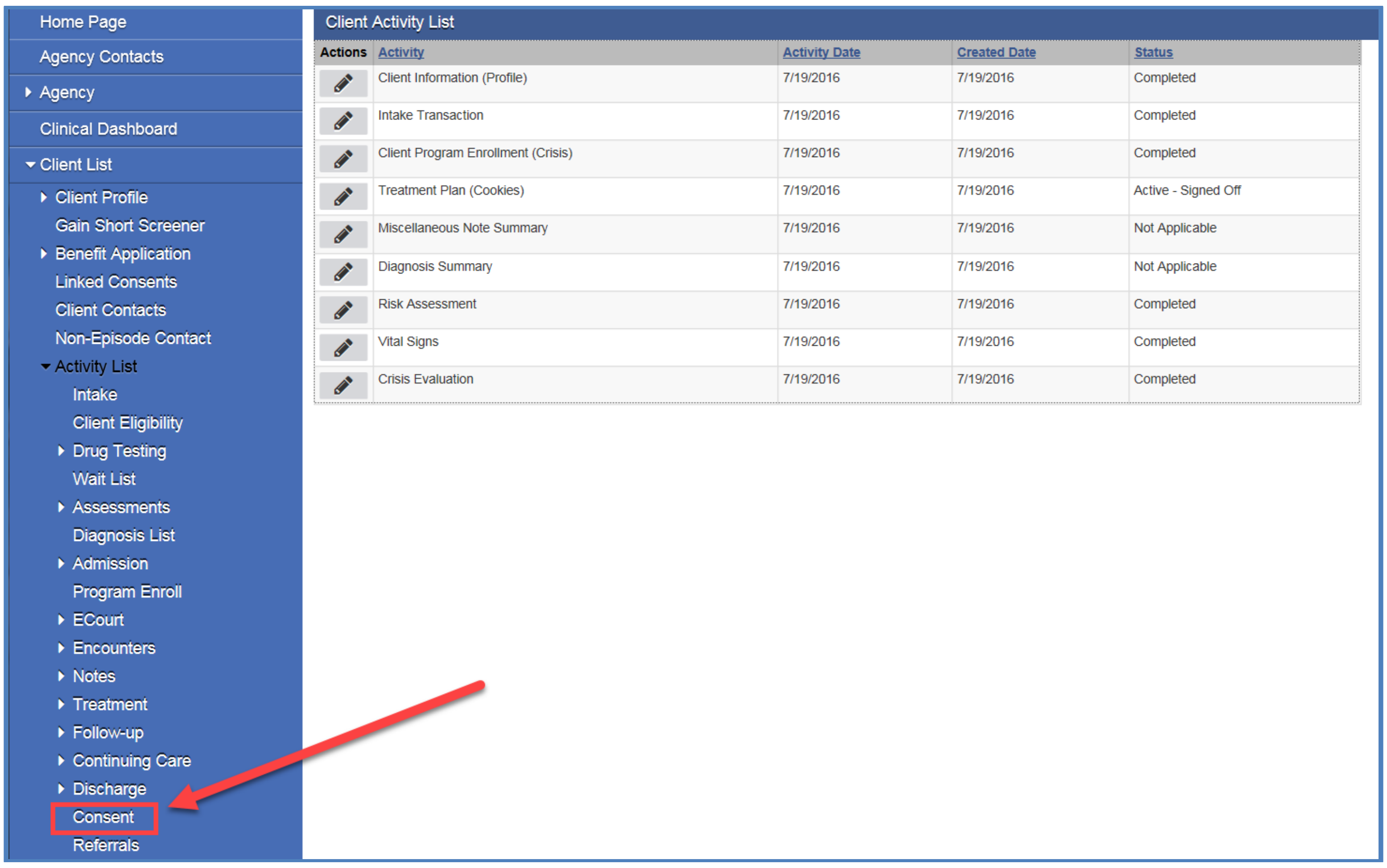
Purpose: The consent page in WITS documents a client has signed a Release of Information. When completed, this page will electronically send specific information about a client to another agency within WITS.

Creating/Printing a Client Consent in WITS

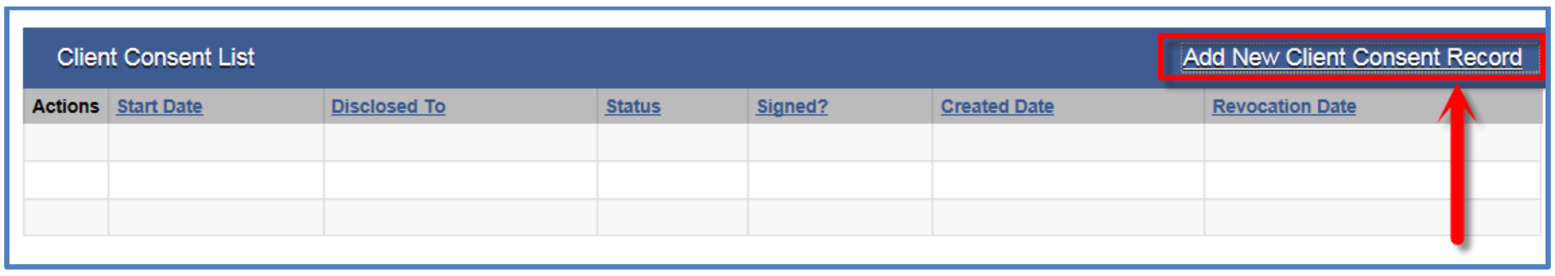
A client must have a completed Client Profile and Intake before a consent record can be created.

Consented information may not be redisclosed.

1. Begin on the Client Activity List.



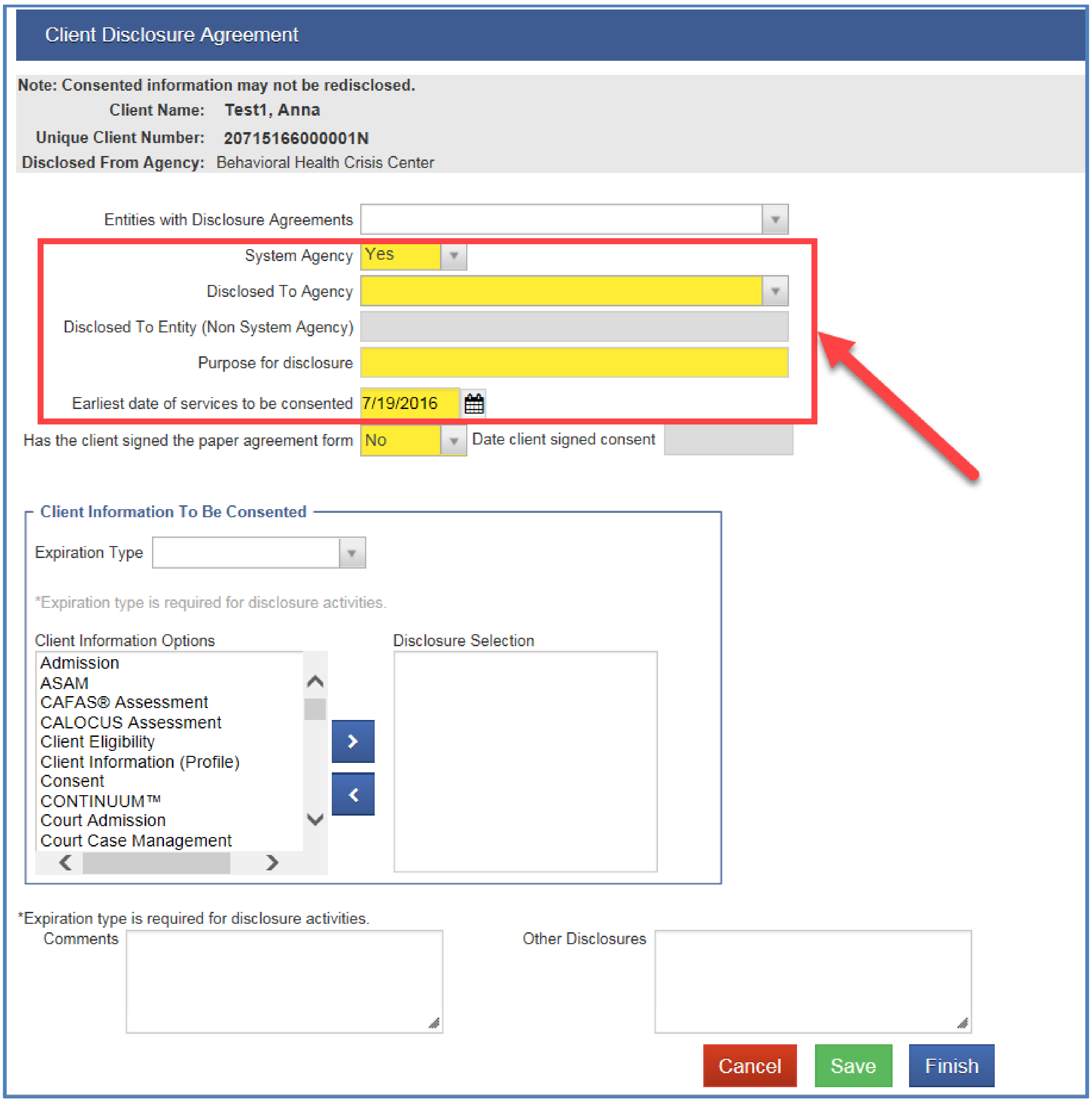
2. Once you're on the Activity List, click Consent on the blue navigation pane.



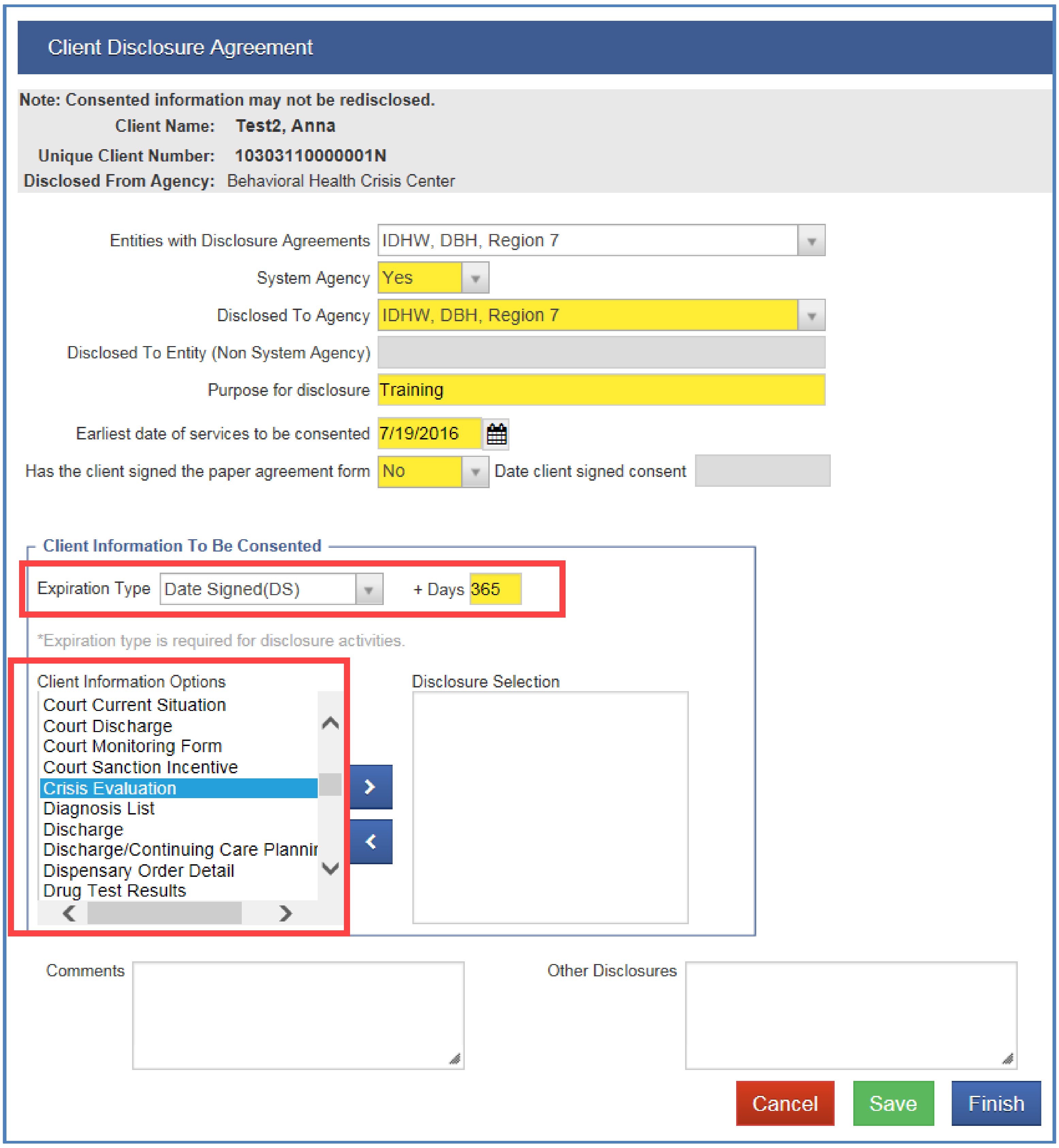
3. On the Client Consent List, click Add New Client Consent Record.

WARNING A consent record in WITS is specific to the episode of care in which it is created. For example, when a client has multiple episodes of care (case 1 on 1/1/17 and case 2 on 1/15/17), if you are consenting information for the date of 1/1/17, the consent must be entered in case 1.

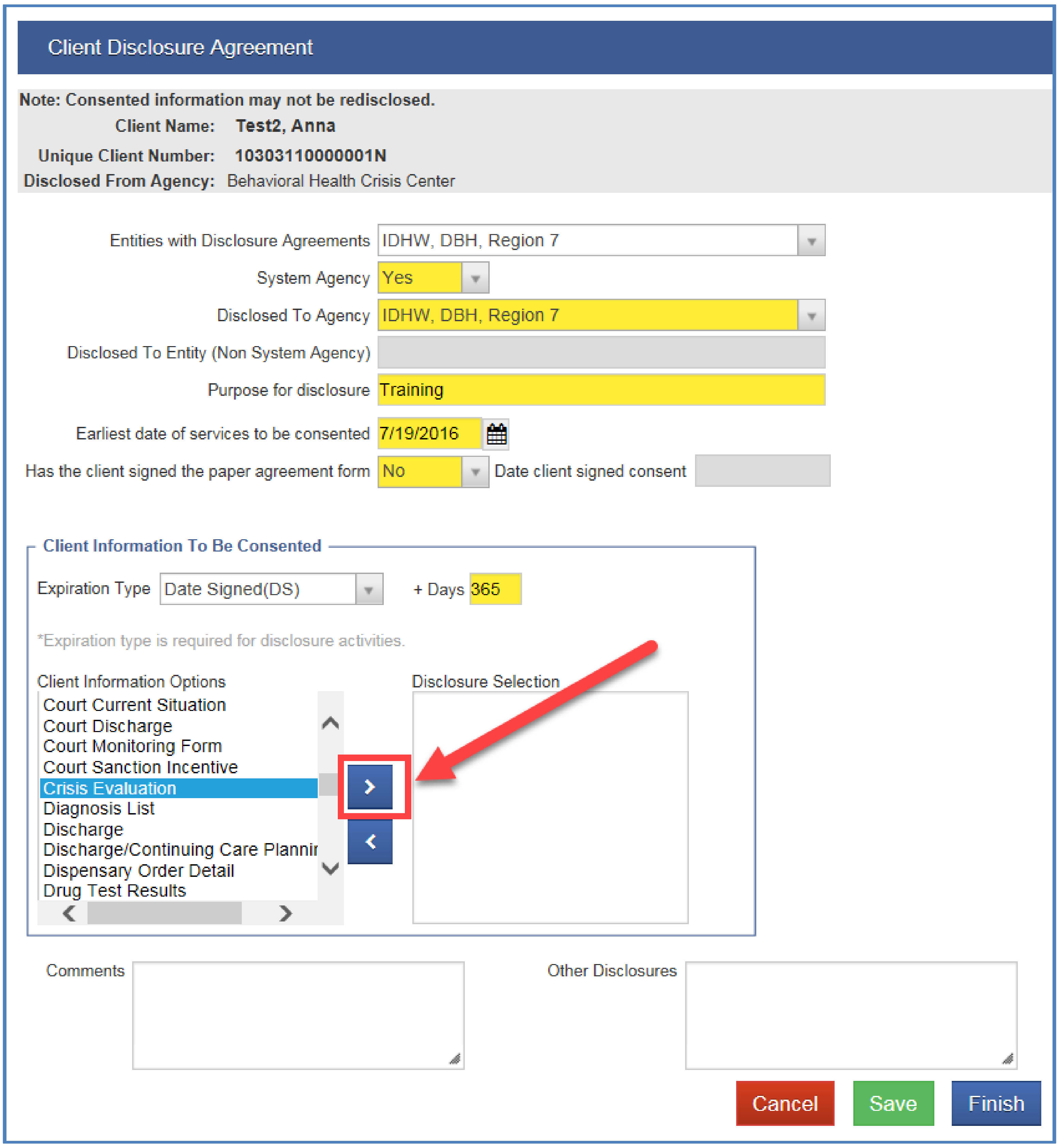
TIPS The Client Name, Unique Client Number and Disclosed From Agency fields are read only and populated by the system:

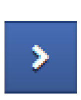


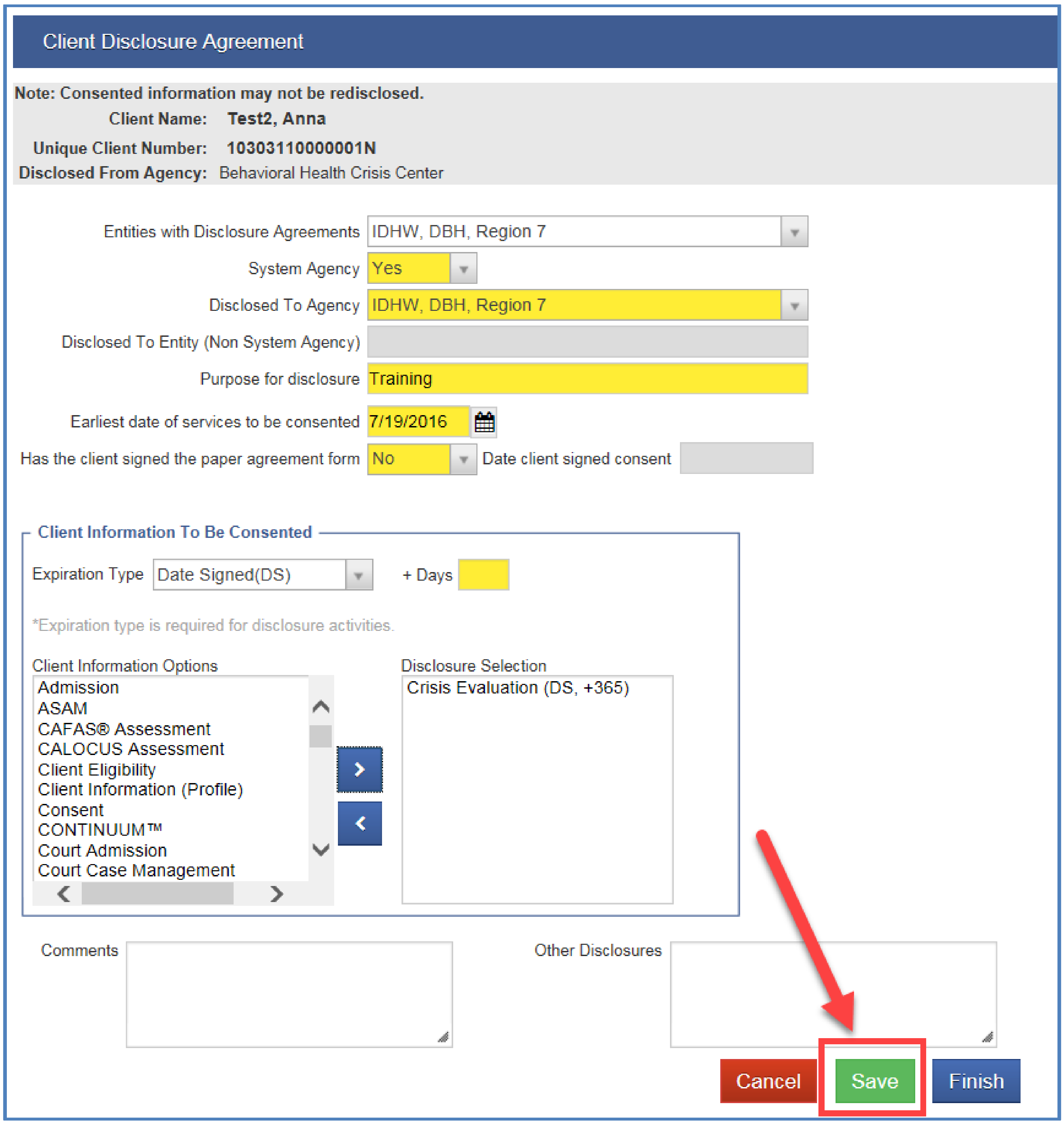
4. Complete the following fields.
   - System Agency – the field will populate with Yes.
   - Disclosed To Agency – select the agency.
   - Purpose for disclosure – enter the appropriate information.
   - Earliest date of services to be consented – the field will populate the Intake date. **This date is critical as it drives the date of information that will be available for the other agency. For example: If the consent date is today, any activity/information recorded yesterday will not be available for another agency to view.**



5. Information listed in the Disclosure Selection field will be made available to the Disclosed To Agency. To add items, complete the following fields.
   - Select the item(s) you want to add to the Consent from the Client Information Options.
   - Expiration Type – select Date Signed (DS).
   - + Days – enter “365”.

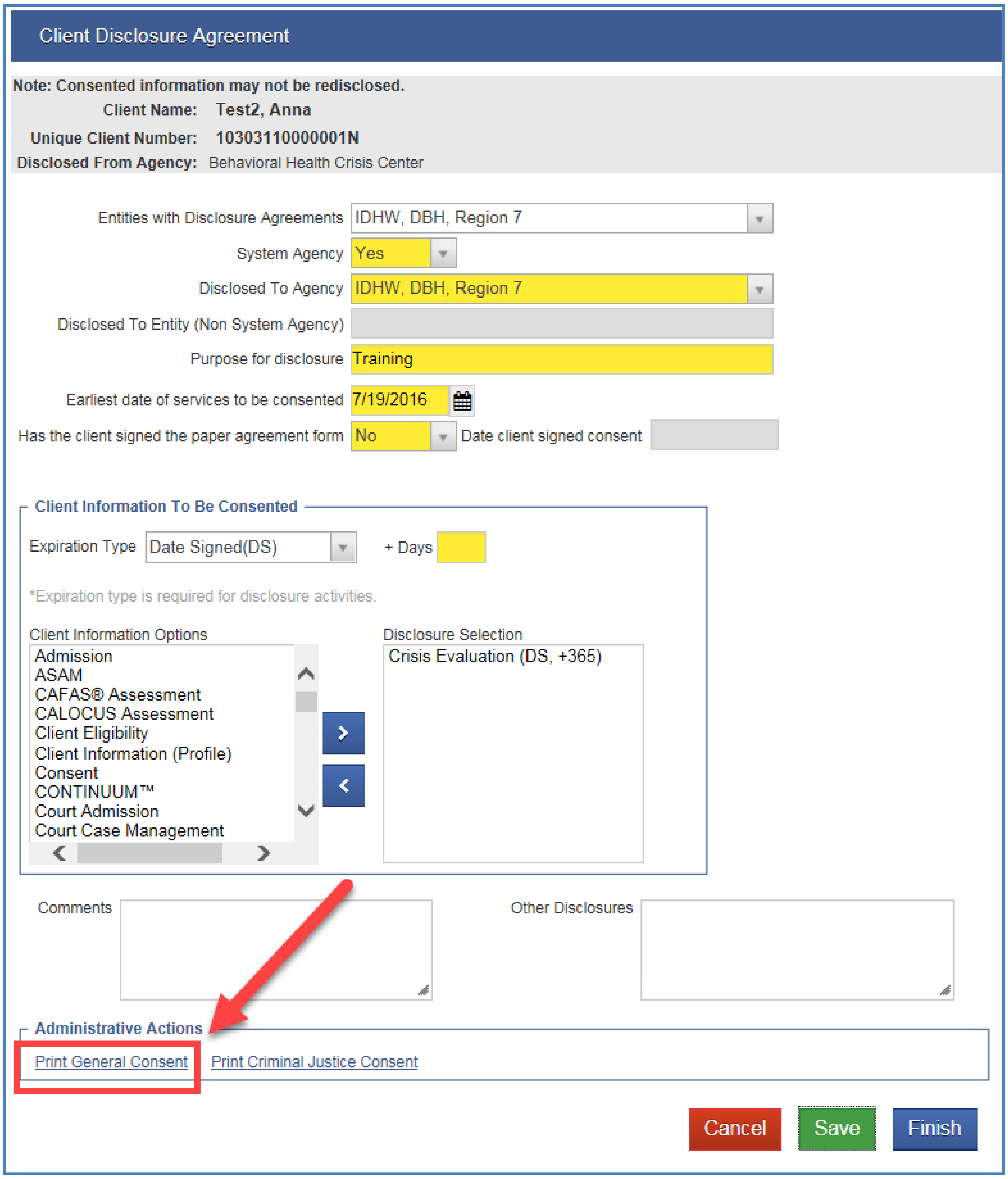


6. Click  to move the item from the Client Information Options to the Disclosure Selection.

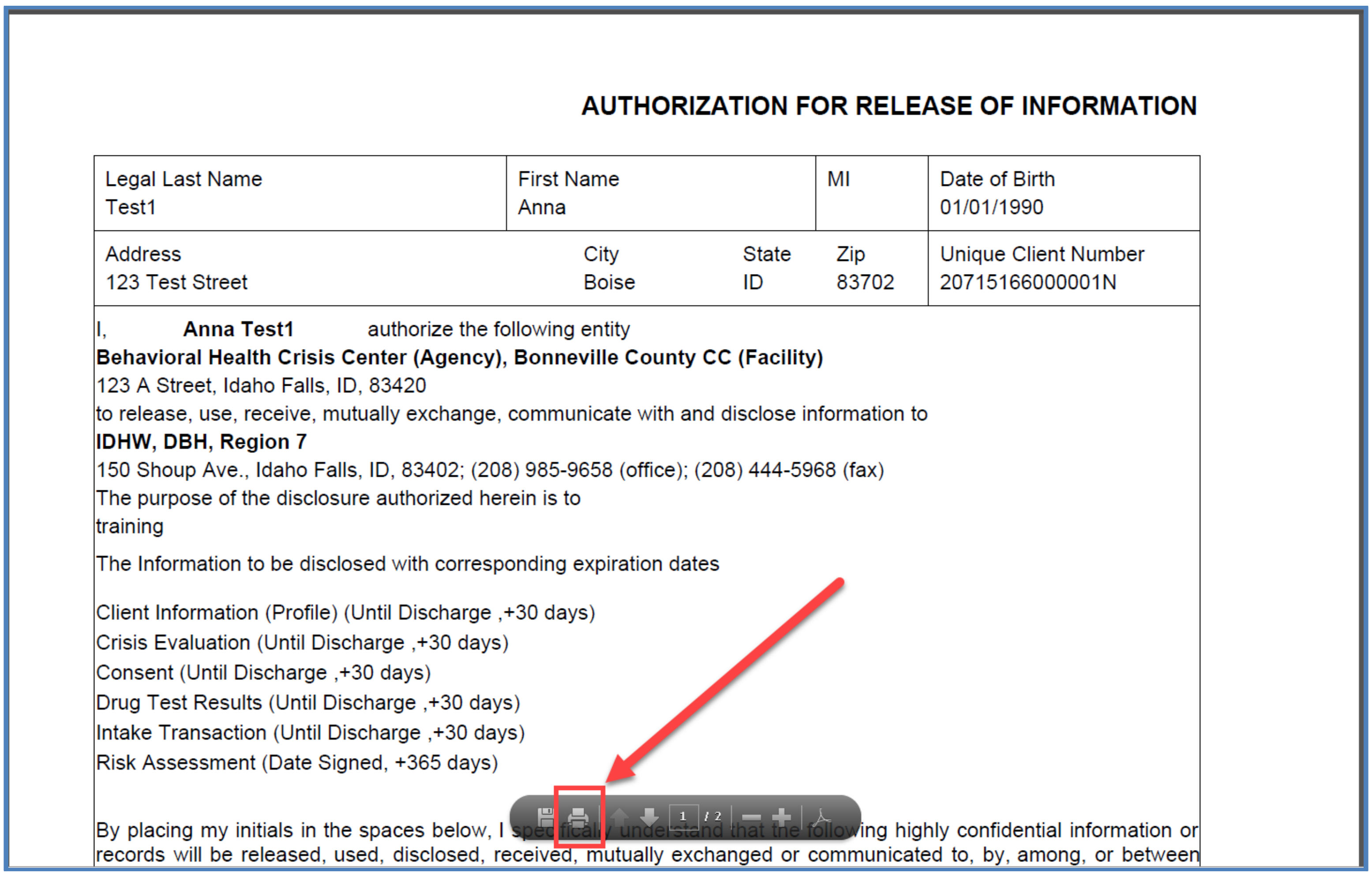


7. Once all appropriate items are listed in the Disclosure Selection, Click 

.



8. Click Print General Consent to generate the Consent Form if necessary (this link does not display until after the Save button is clicked).



AUTHORIZATION FOR RELEASE OF INFORMATION

Legal Last Name Test1	First Name Anna	MI	Date of Birth 01/01/1990
Address 123 Test Street	City Boise / State ID / Zip 83702		Unique Client Number 20715166000001N

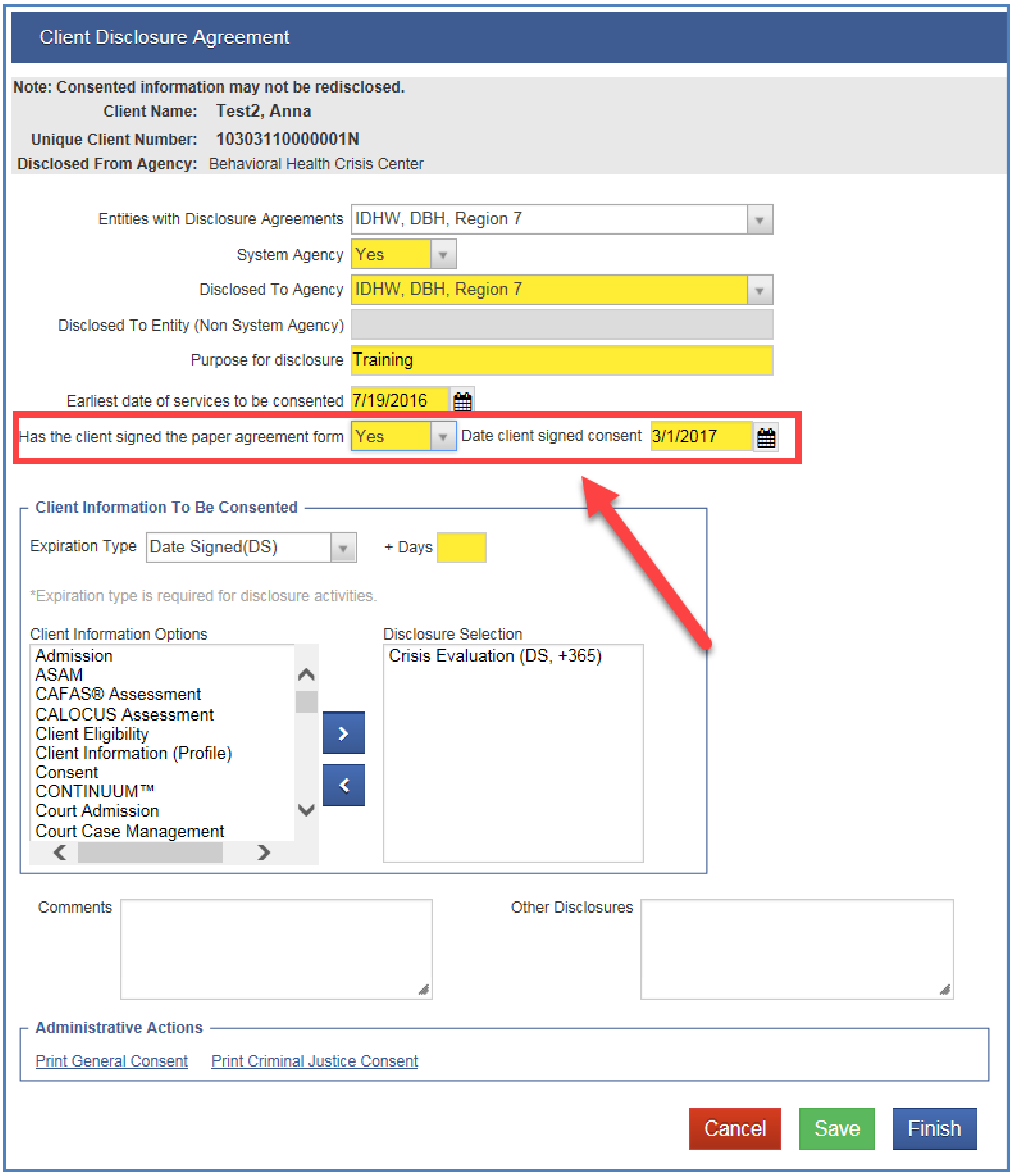
I, **Anna Test1** authorize the following entity
Behavioral Health Crisis Center (Agency), Bonneville County CC (Facility)
123 A Street, Idaho Falls, ID, 83420
to release, use, receive, mutually exchange, communicate with and disclose information to
IDHW, DBH, Region 7
150 Shoup Ave., Idaho Falls, ID, 83402; (208) 985-9658 (office); (208) 444-5968 (fax)
The purpose of the disclosure authorized herein is to
training

The Information to be disclosed with corresponding expiration dates

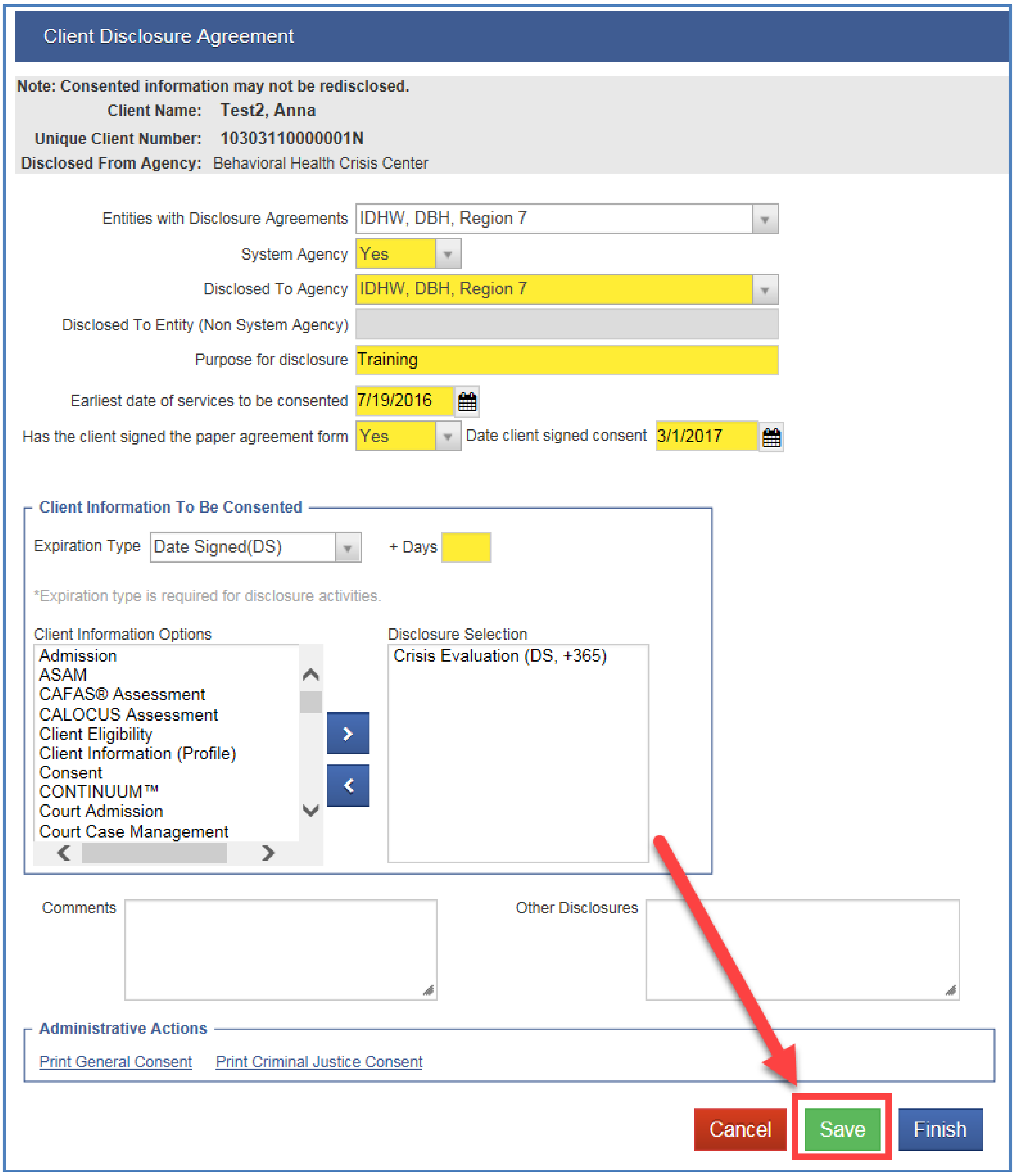
Client Information (Profile) (Until Discharge ,+30 days)
Crisis Evaluation (Until Discharge ,+30 days)
Consent (Until Discharge ,+30 days)
Drug Test Results (Until Discharge ,+30 days)
Intake Transaction (Until Discharge ,+30 days)
Risk Assessment (Date Signed, +365 days)

By placing my initials in the spaces below, I specifically understand that the following highly confidential information or records will be released, used, disclosed, received, mutually exchanged or communicated to, by, among, or between

9. The Consent displays in a separate window. Click  (the print icon). Close the window when finished.

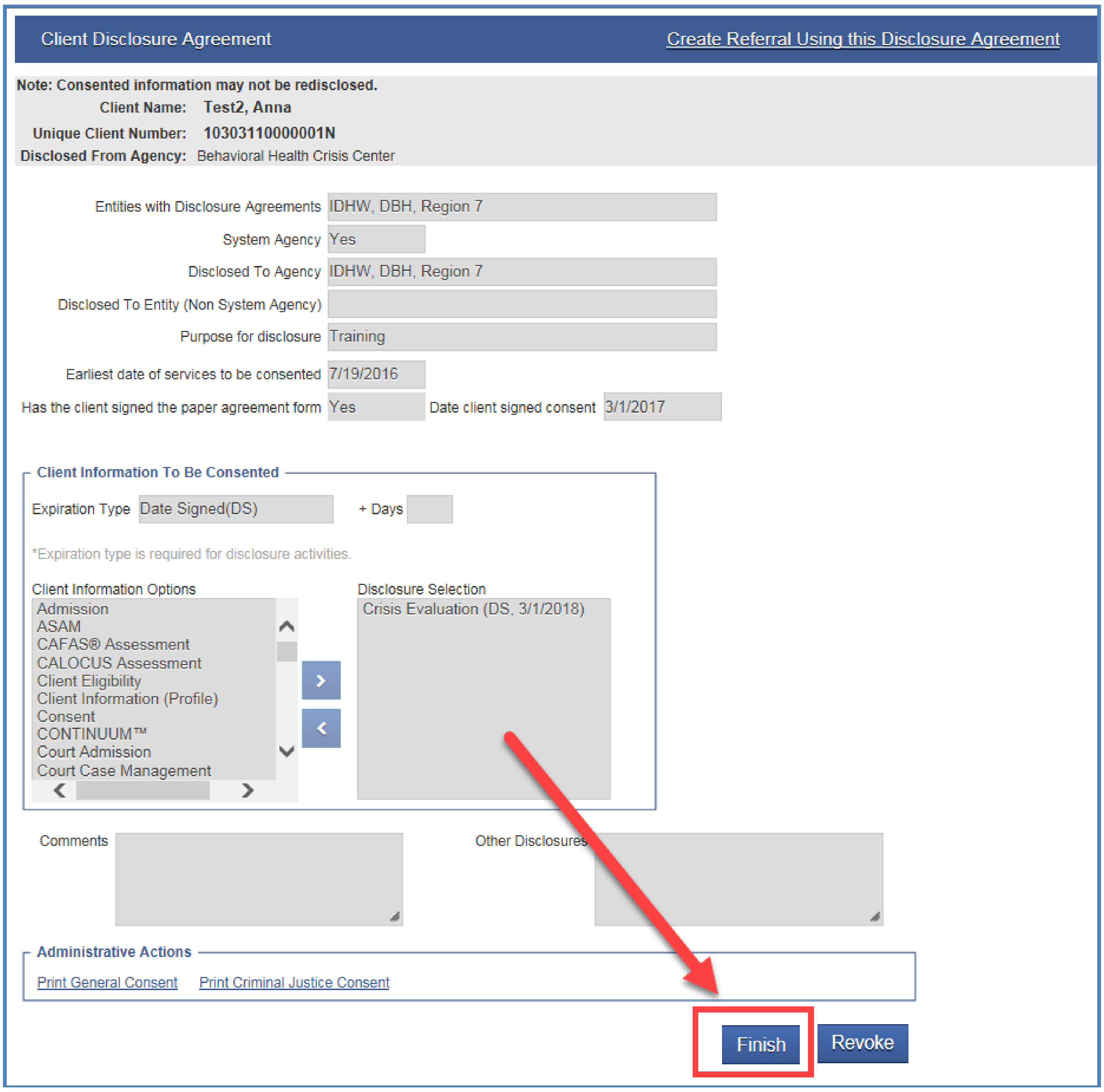


10. The Consent is not active until you indicate the client has signed the paper agreement. Complete the following fields:
    - Has the client signed the paper agreement form – select Yes only after the consent form is complete and the client has signed the paper agreement form.
    - Date client signed consent – the field will populate with today's date when the answer to "Has the client signed the paper agreement form" is changed to Yes. Update to the date signed.



11. Click 

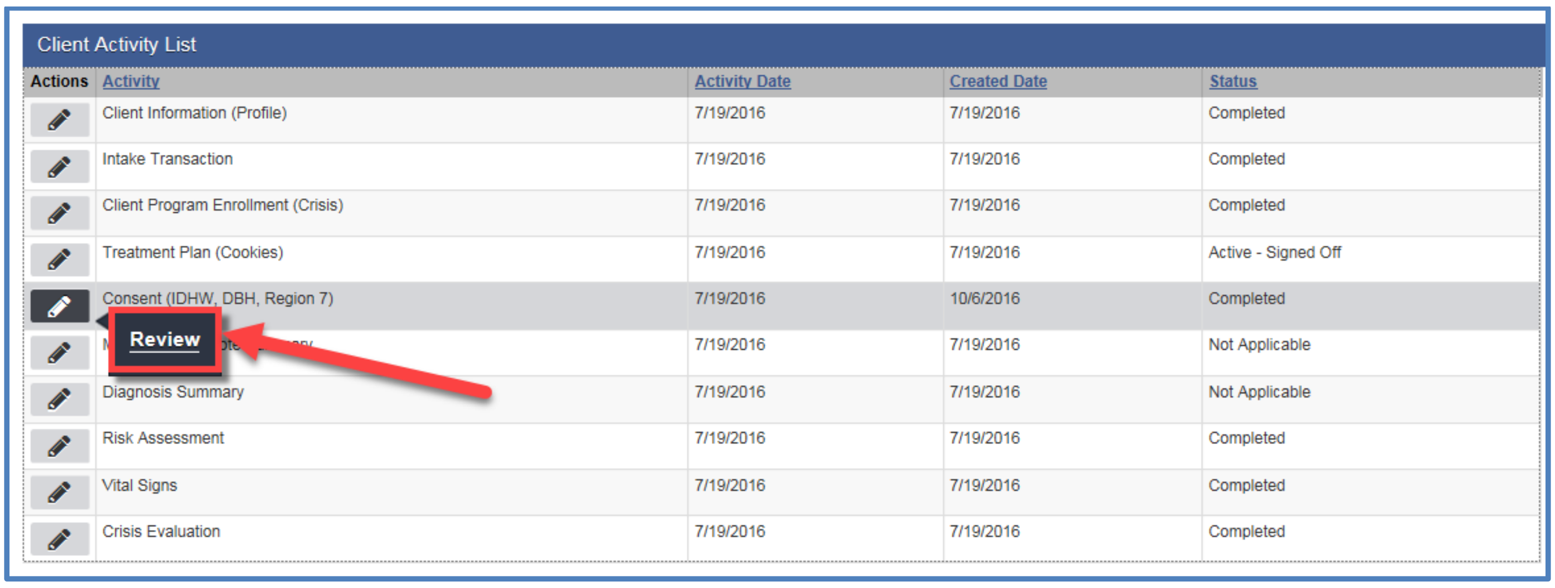
. The Consent will become Read Only.



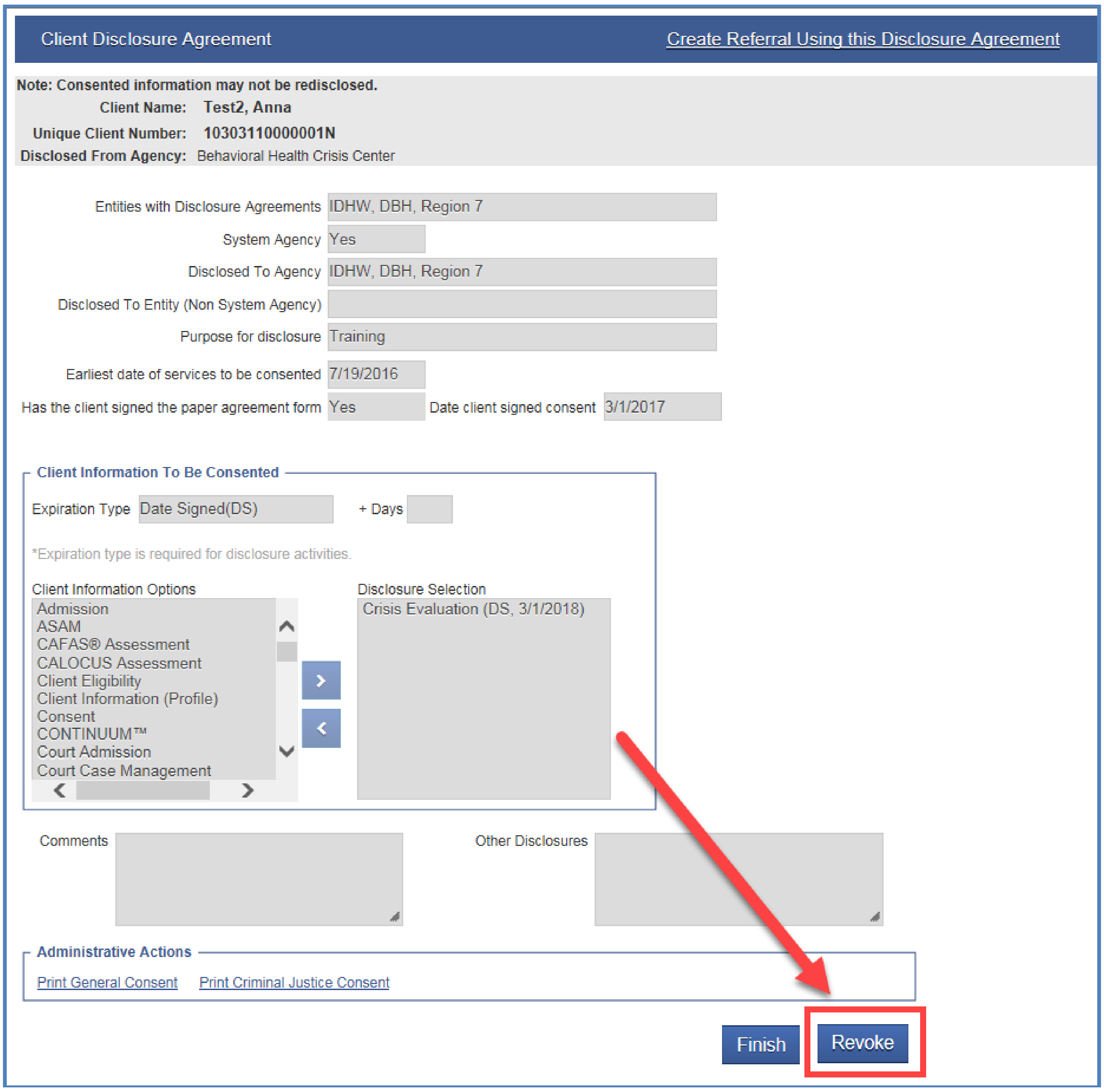
12. Click Finish ***or*** create a Referral by clicking Create Referral Using this Disclosure Agreement.

Revoking a Consent

1. Begin on the Client Activity List.



2. Hover over the pencil icon and click Review under Actions for an individual Consent on the Client Activity List.



3. The Consent displays. Click Revoke.

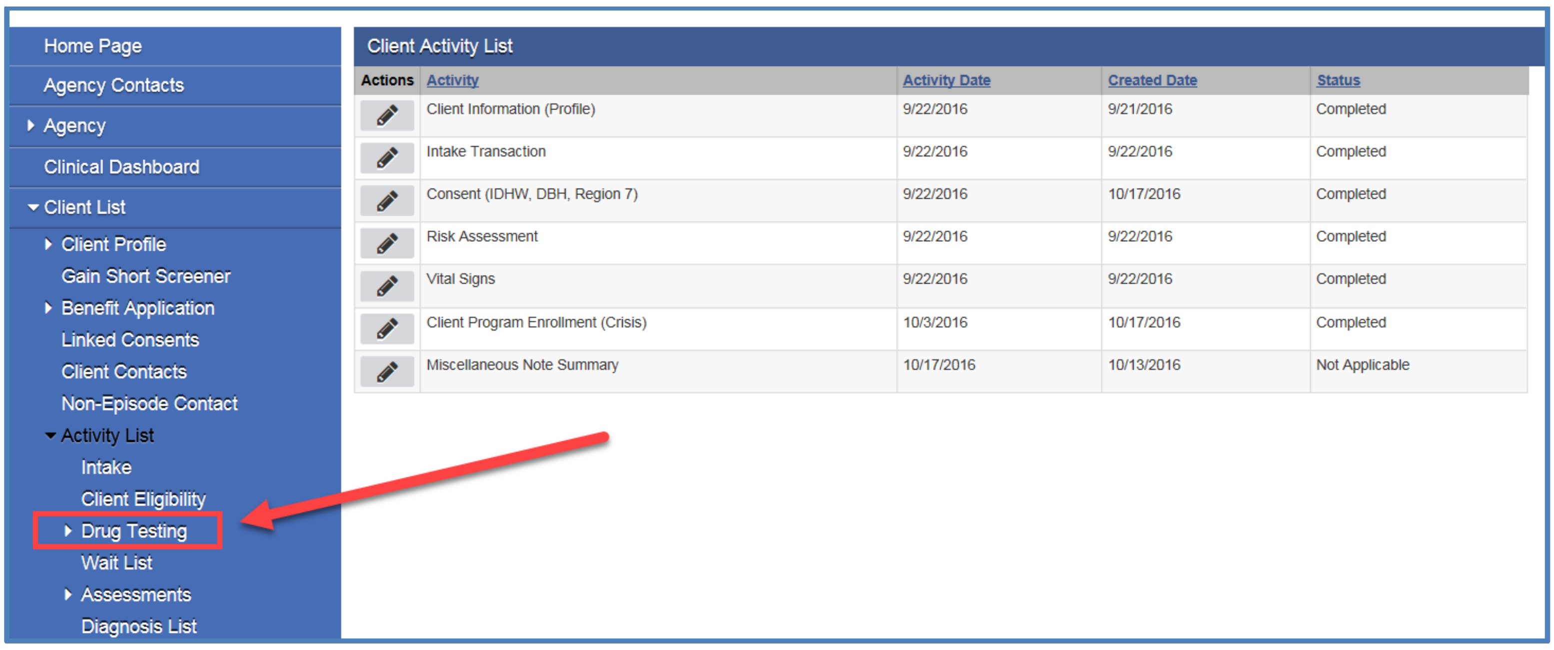
4. Click Yes to revoke the Consent or click No to cancel.

Drug Testing

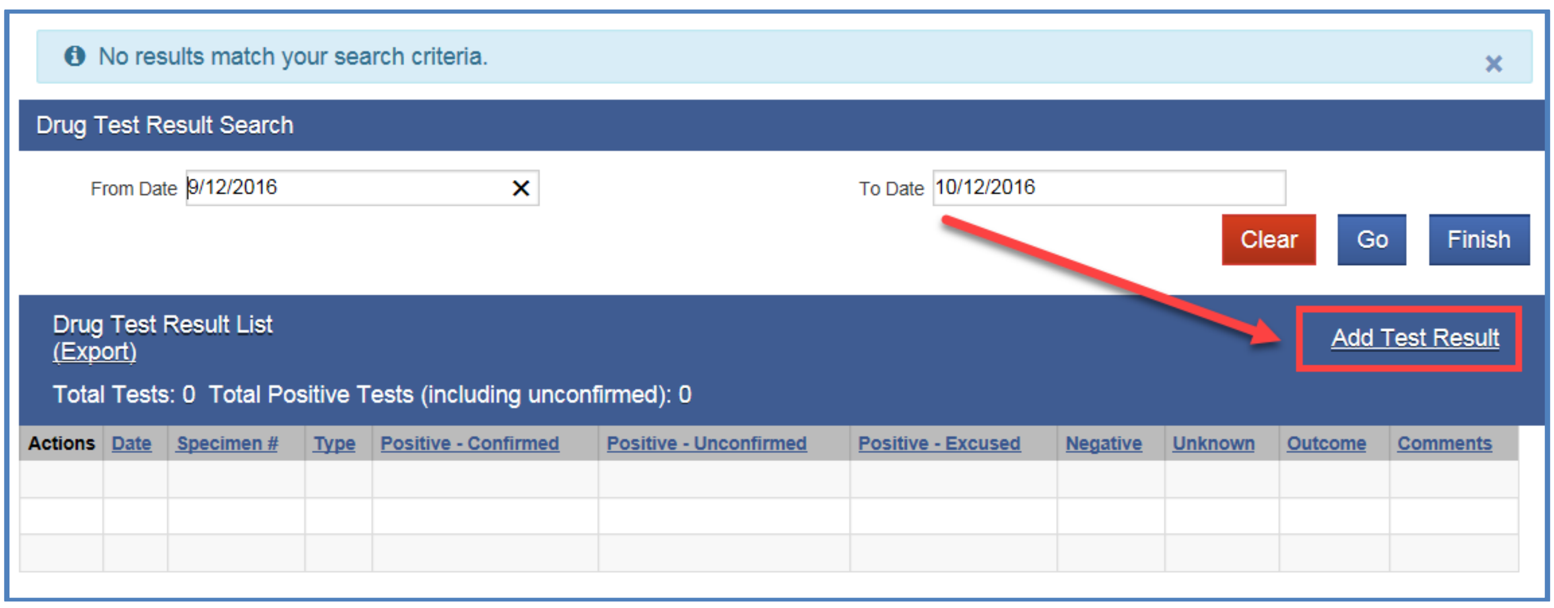
Purpose: The drug test results page documents the results of drug tests during an episode of care.

Creating a Drug Test Results Record

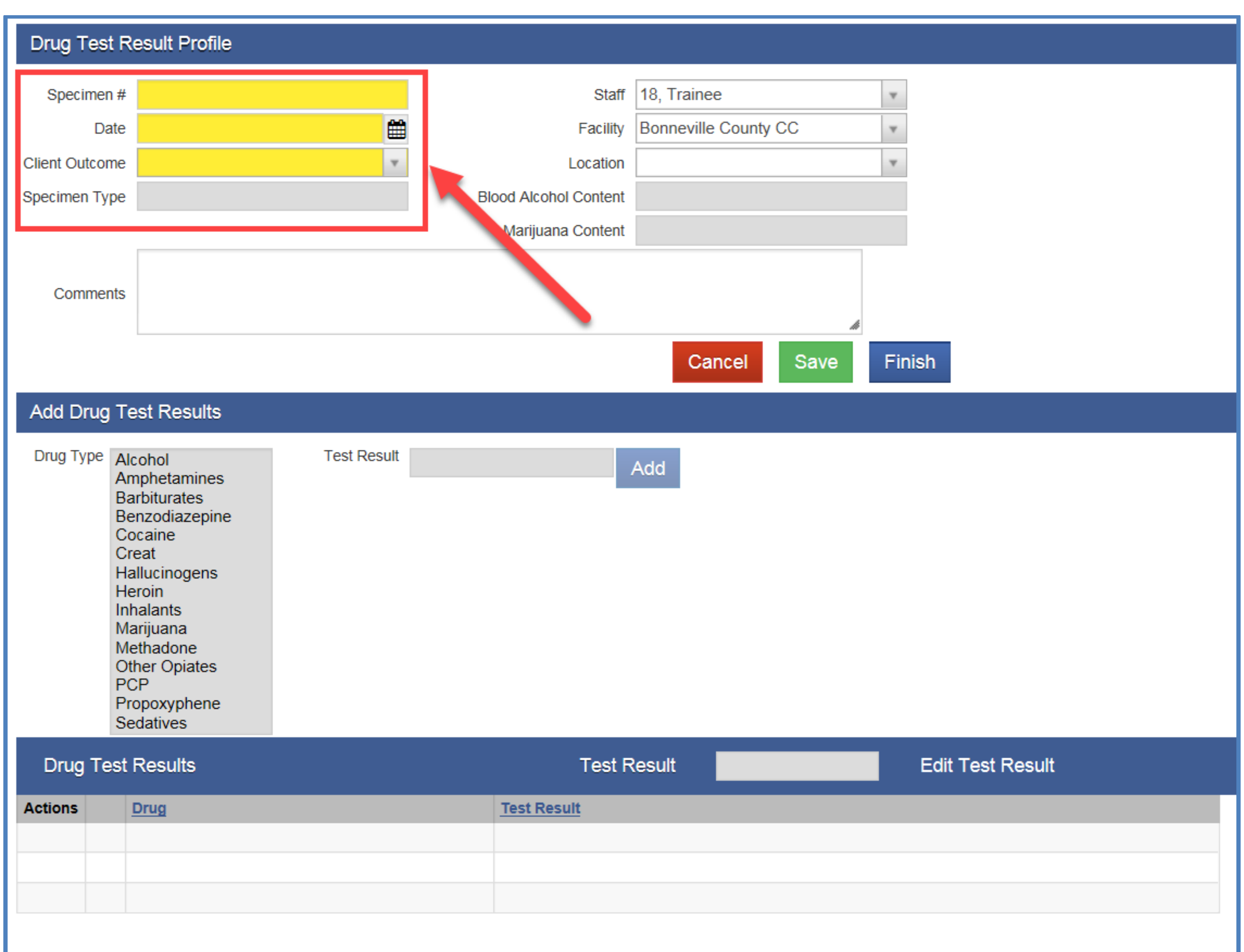
1. Begin on the Client Activity List.



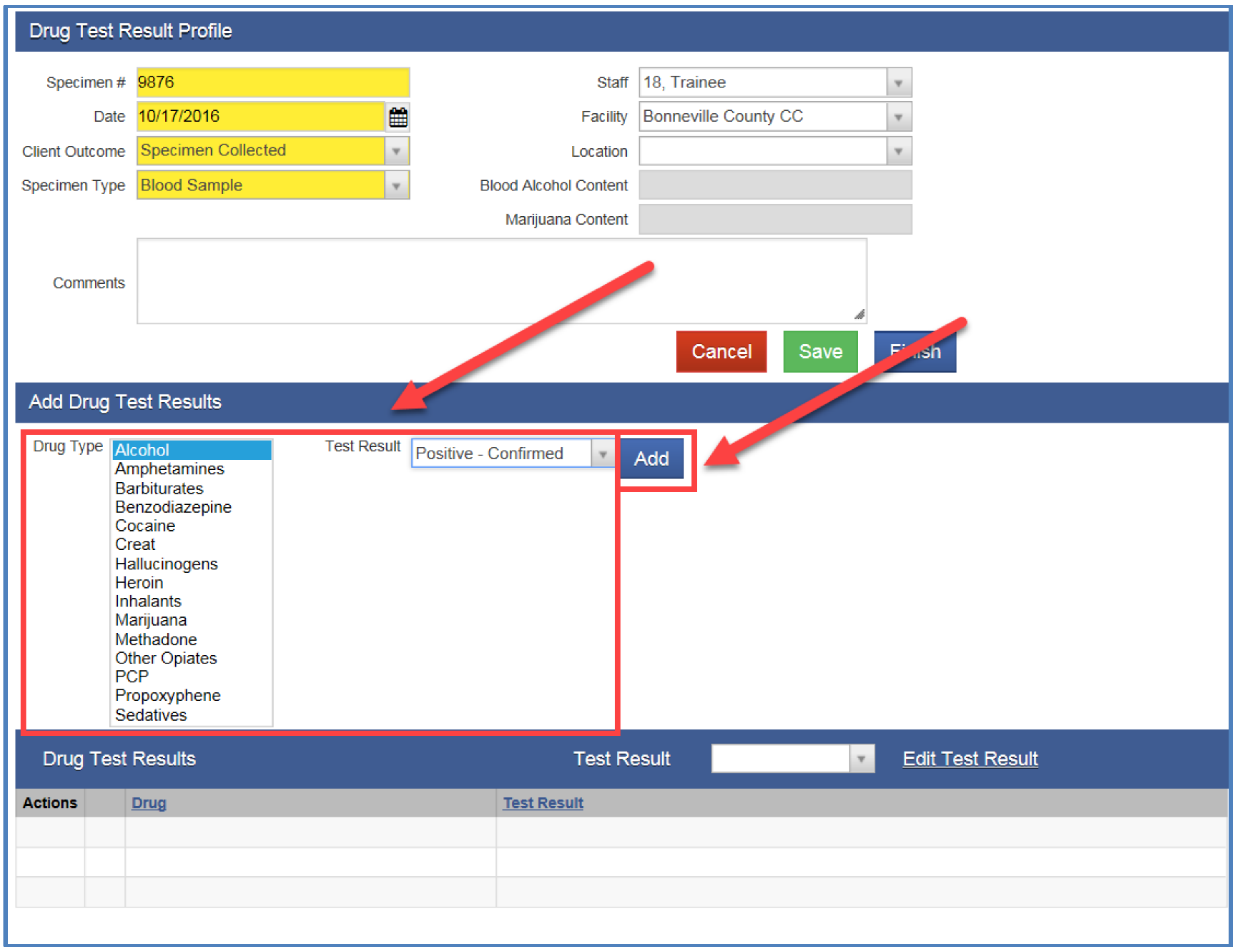
2. Once you're on the Activity List, click Drug Testing on the blue navigation pane.



3. Click Add Test Result.

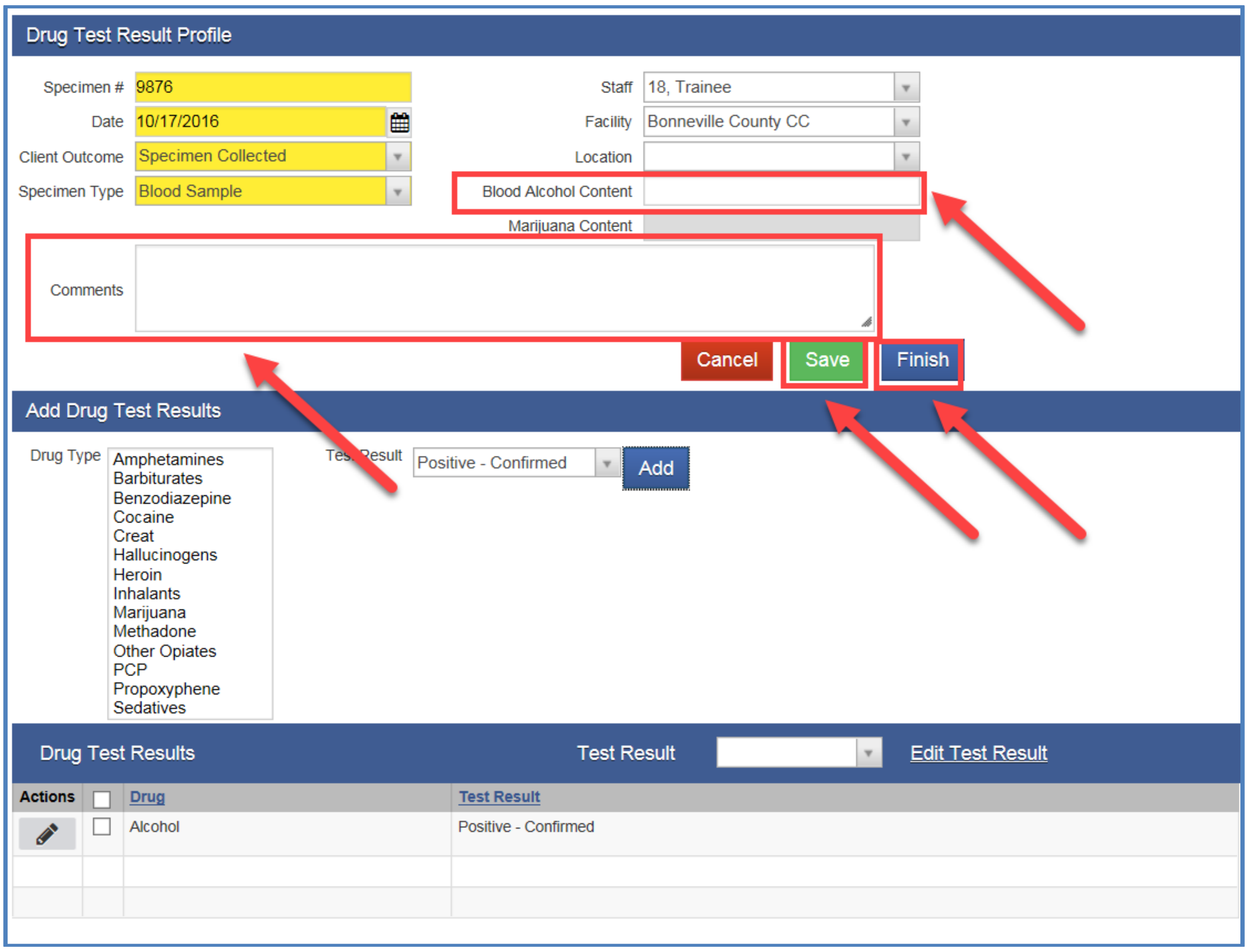


4. Complete the following fields.
    - Specimen # – enter the specimen number (if you do not have a specimen number enter the date).
    - Date – enter the date.
    - Client Outcome – select the client outcome.
    - Specimen Type – if applicable, select the specimen type. This field will only be editable if the Client Outcome is one of the following: Specimen Collected, Specimen Diluted, Specimen Rejected, Other, or Low Creatinine.



5. Complete the following fields to document drug test results.
    - Drug Type – select all applicable drug types.
    - Test Result – select the test result type.

6. Click Add.



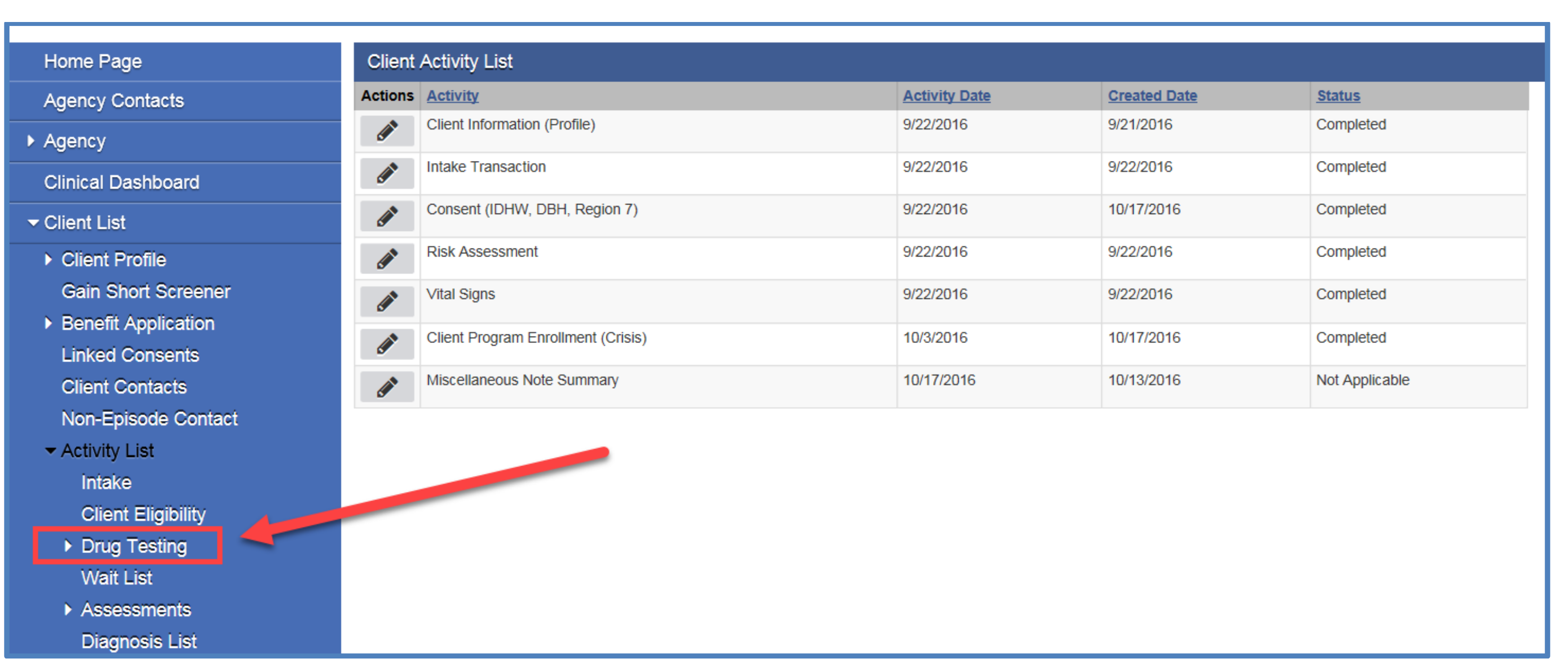
7. Complete the following fields as needed.
   - Blood Alcohol Content – enter the blood alcohol content.
   - Comments – enter comments.

8. Click Save and Finish.

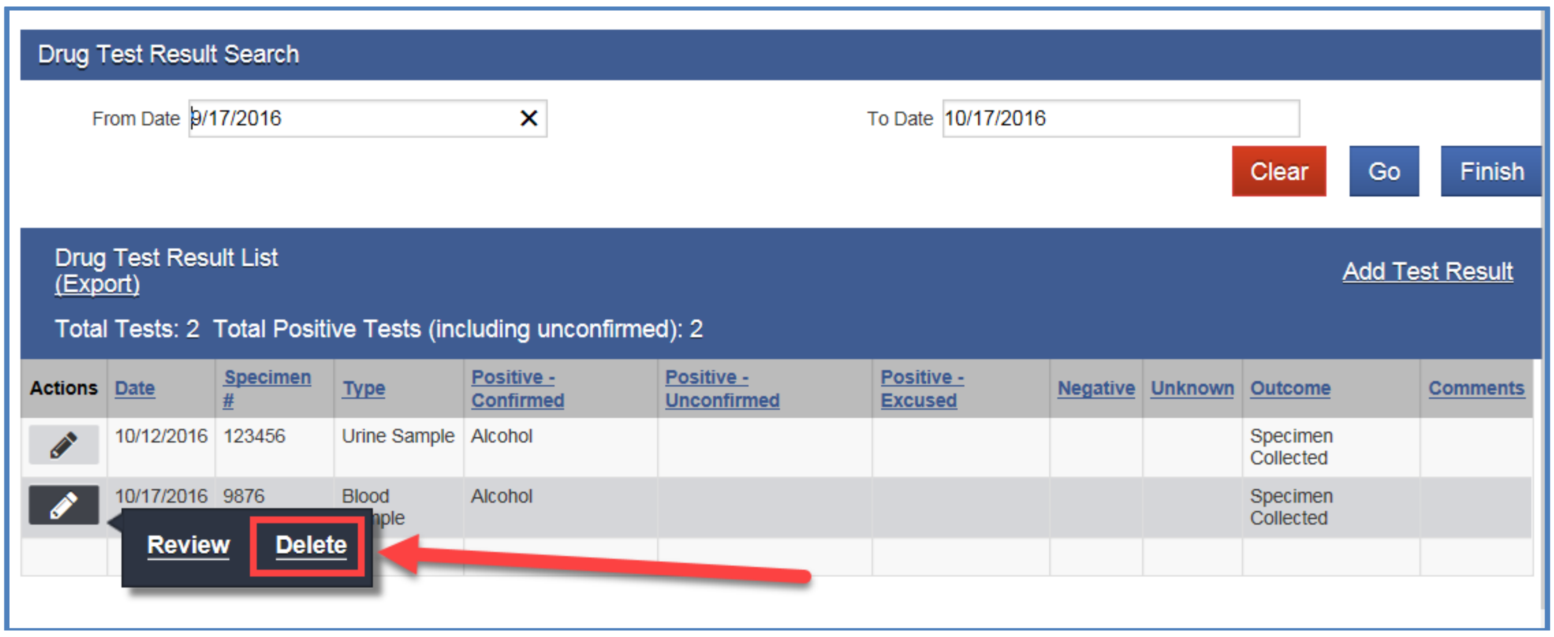
Deleting a Drug Test Results Record

Drug Test Results in WITS are considered a part of the client's official electronic health record (EHR). It is your agencies responsibility to ensure you are adhering to the documentation standards set forth by IDAPA.

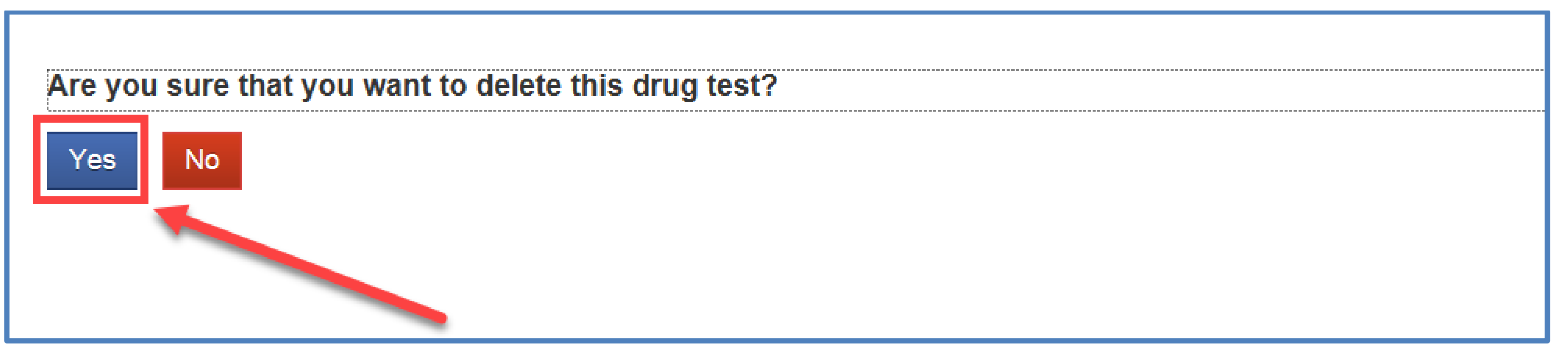
1. Begin on the Client Activity List.



2. Once you're on the Activity List, click Drug Testing on the blue navigation pane.



3. The Drug Test Results List displays. Hover over the ✎ and click **Delete** under Actions for the drug test results record you want to delete.



4. Click **Yes** to delete the drug test or click **No** to cancel.

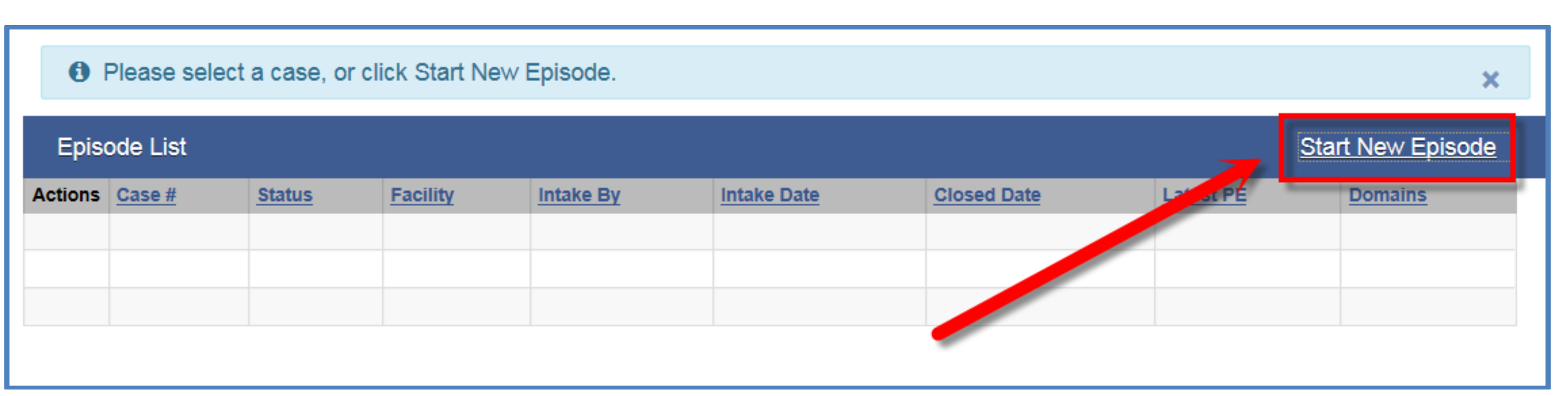
Intake (Episode of Care or Case)

Purpose: In WITS, all activities are based upon an active episode of care, which is started by an Intake. An Intake must be created in WITS before any client activities can be performed.

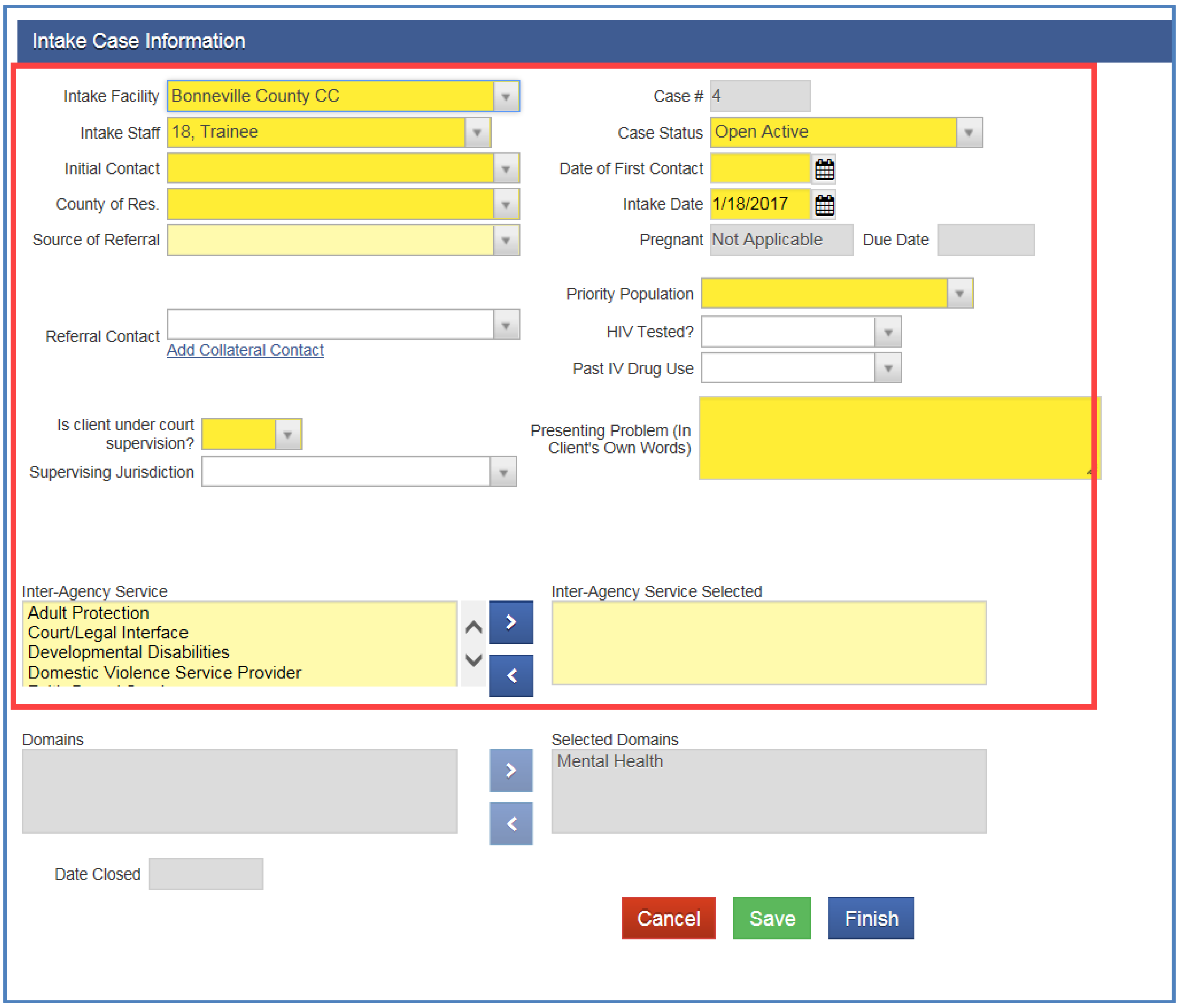
Creating an Intake (New Episode of Care or Case)

STANDARDS Each time a client comes into the BHCCC create a new Intake and a new Crisis Evaluation. For example, if a client comes to the BHCCC at 4:00 AM and leaves at 1:00 PM on 1/20/17 (this is one episode) and then returns to the BHCCC at 6:00 PM on 1/20/17 (this is one episode) so the client will have two episodes on 1/20/17.

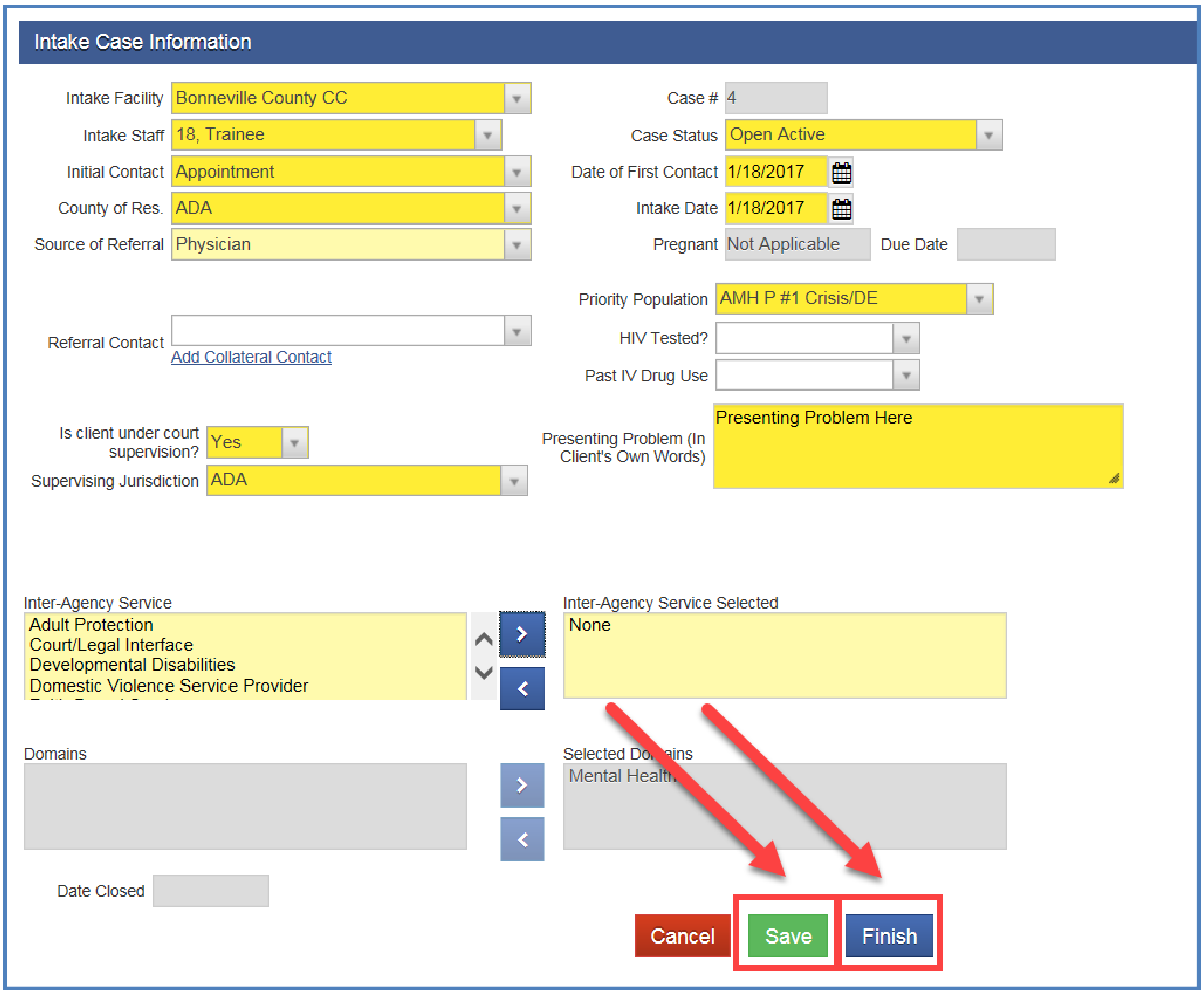
1. Begin on the Client Activity List. If you do not have any open episodes, the Episode list will display.



2. Click Start New Episode.



3. Complete the following fields.
    - Intake Facility – the field will populate with the facility selected at login (where the client is receiving services). Update as needed.
    - Intake Staff – the field will populate with the name of the person creating the Intake. Update as needed.
    - Case Status – the field will populate as Open Active.
    - Initial Contact – select type of initial contact.
    - Date of First Contact – enter the initial contact date.
    - County of Res – select county of residence.
    - Intake Date – the field will populate with today's date. Update as needed.
    - Source of Referral – select source of Referral.
    - Pregnant – select pregnant status. If the client is male, this field will be set as not applicable.
    - Due Date – enter due date of pregnancy. This field is required if Pregnant is YES.
    - Priority Population – **select AMH P #1 Crisis/DE**.
    - Is client under court supervision? – select Yes or No.
    - Supervising County – enter the supervising county. This field is required when Is client under court supervision is YES.
    - Presenting Problem – enter the presenting problem in the client's own words.
    - Inter-Agency Service – select all applicable inter-agency service(s) and move to Inter-Agency Service Selected.

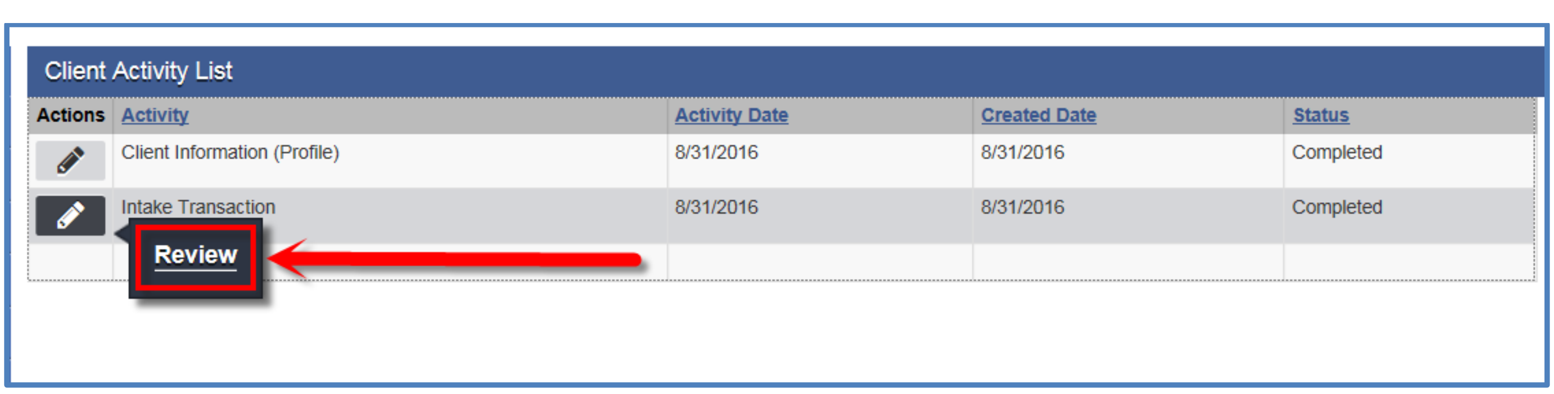


4. Click **Save** and **Finish**.

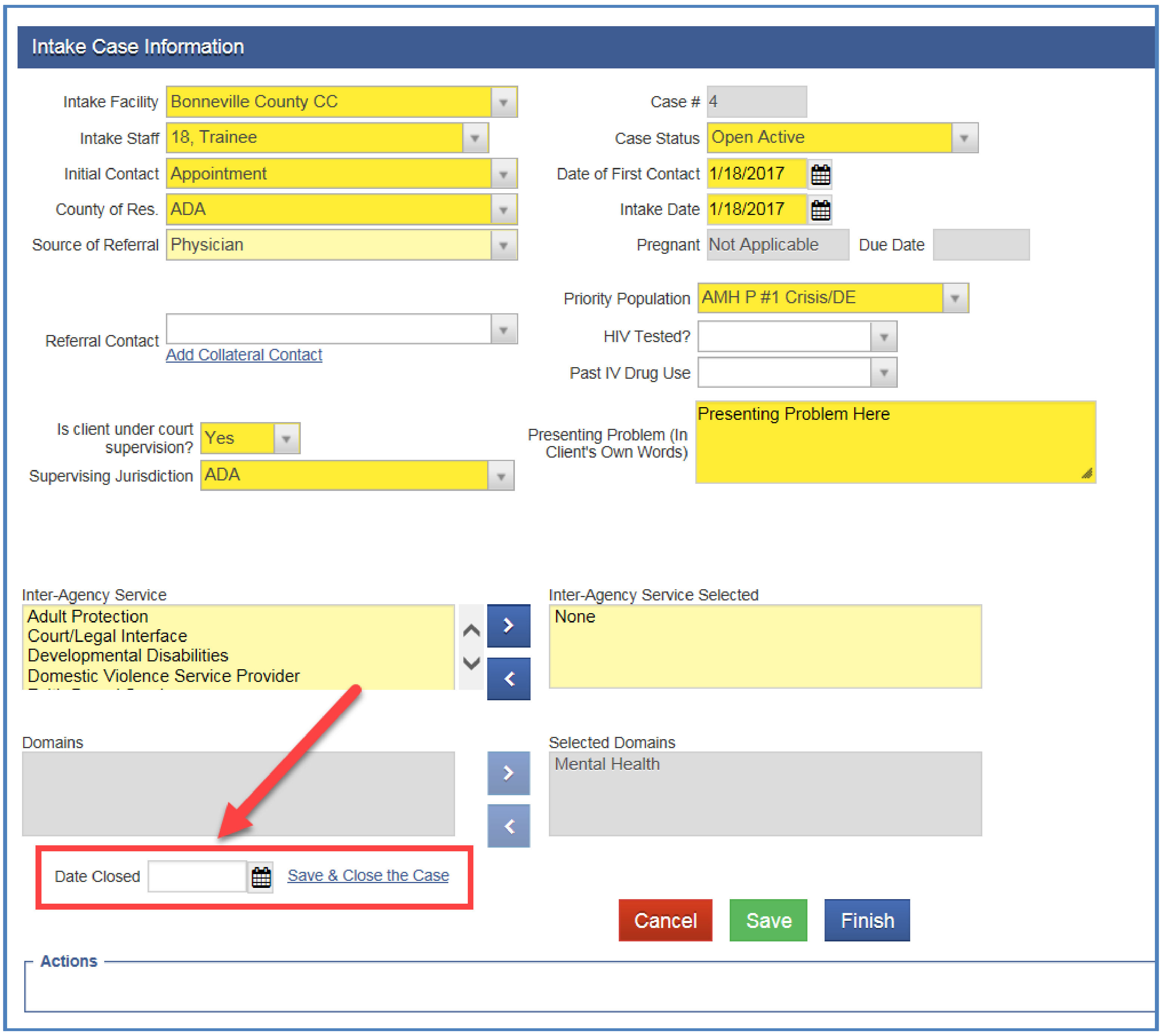
Closing an Intake (Episode of Care)

The following records must be complete before an Intake can be closed: Client Profile, Crisis Evaluation, and Crisis Program Enrollment.

1. Begin on the Client Activity List.

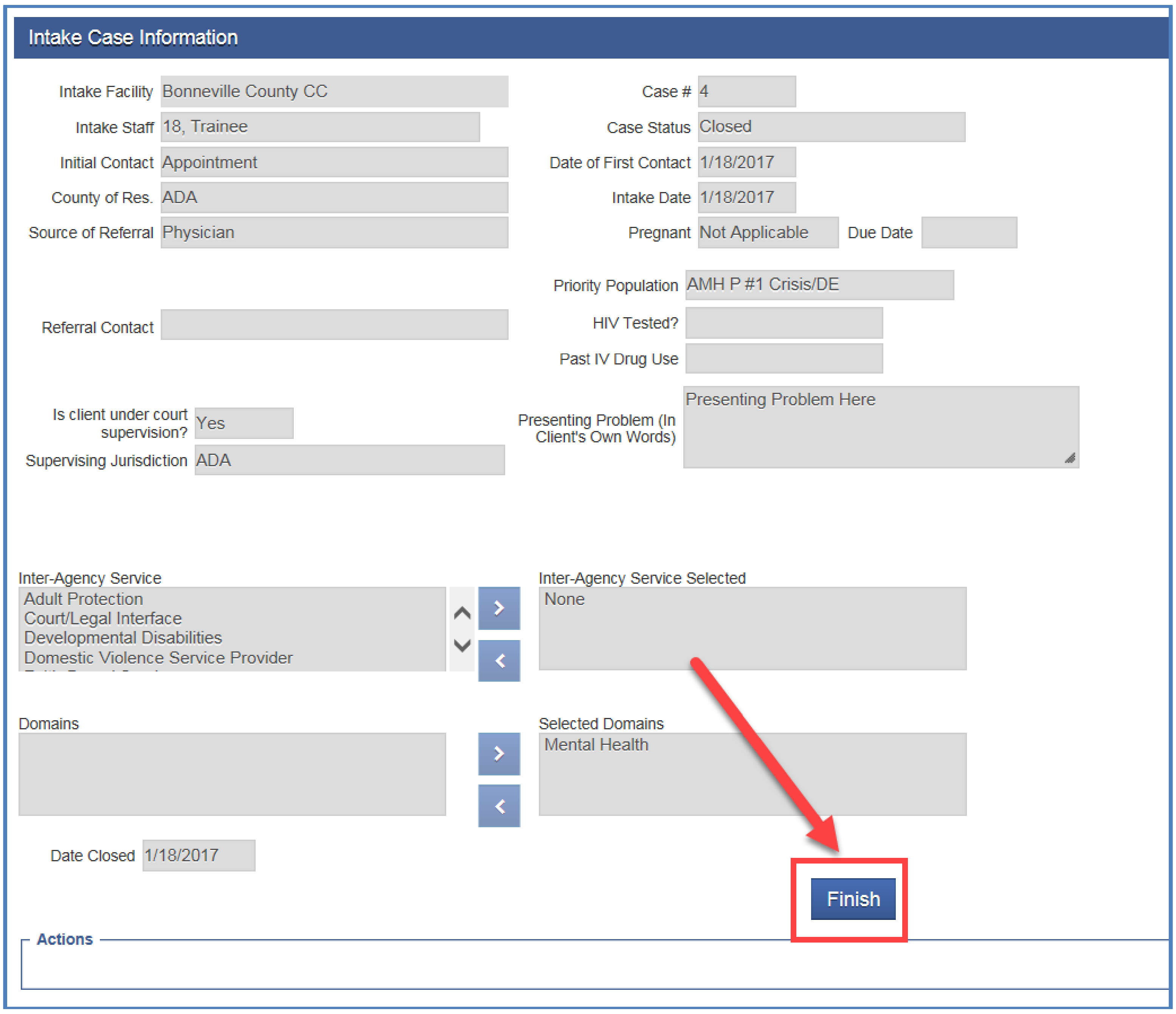


2. Once you're on the Activity List, hover over the pencil icon and click **Review** under Actions for the Intake.



3. Complete the following fields.
   - Date Closed – enter the last date of contact with the client.

4. Click Save & Close the Case.



5. The Intake becomes Read-Only. Click Finish.

Re-Opening an Intake (Episode of Care)

Intakes can be re-opened by contacting the WITS Help Desk at DBHWITSHD@dhw.idaho.gov, or by calling 208-332-7316, or toll free 844-726-7493.

Linked Consents (Clients with Consents from Outside Agencies)

Purpose: WITS can electronically share specific information about a client between agencies. This happens when client has signed a Release of Information form and a Consent is entered into WITS by the consenting agency.

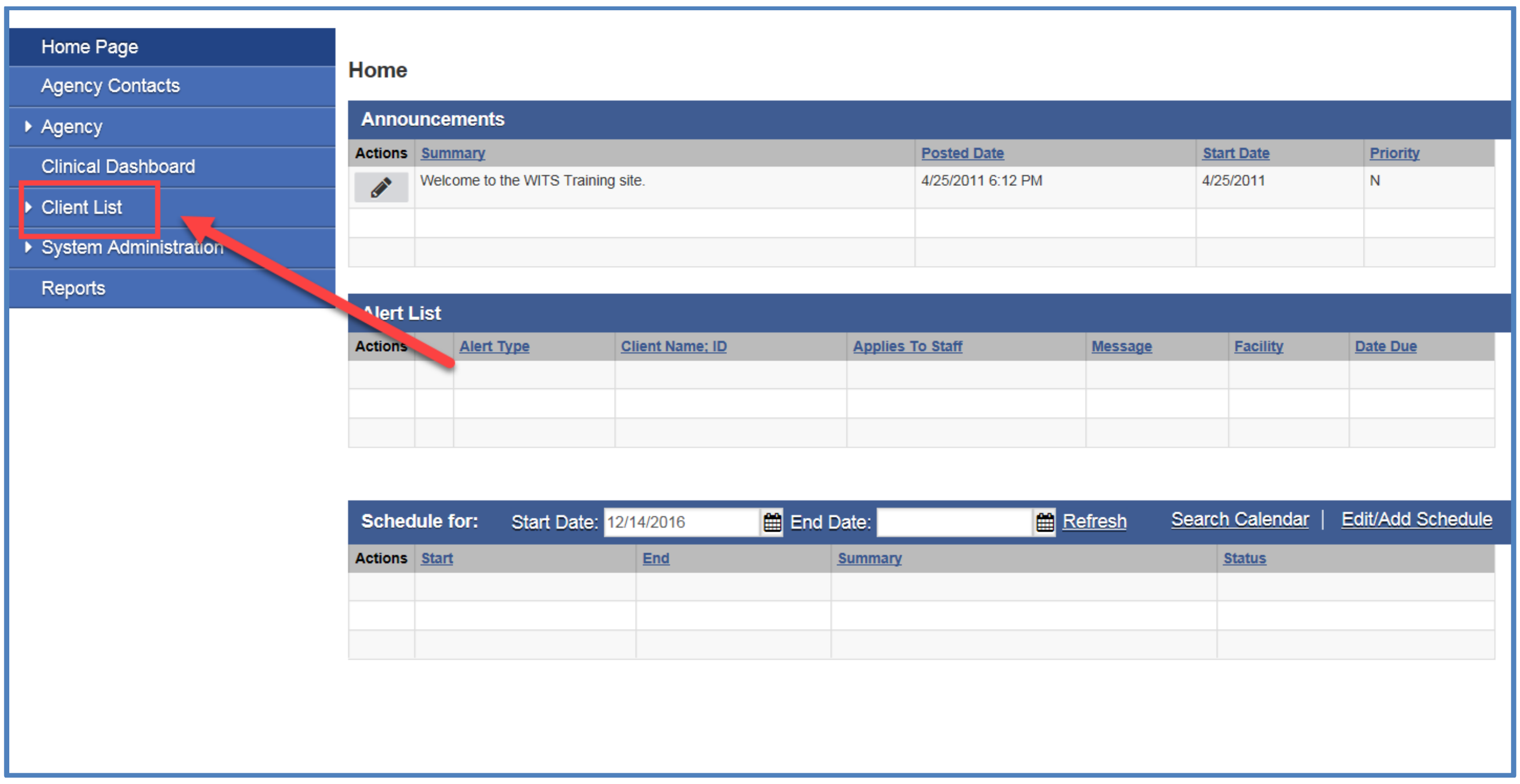
- If you are trying to accept a referral and the client has previously been at your agency, you will need to link the consent prior to accepting the Referral.
- If you do not have a referral, you will still need to link the consent to the client at your agency.

How do I know which agency sent me the Consent?

There are two of different ways to determine which agency sent the consent and they vary depending on if the consent has been linked or not.

TIPS When the consent is not linked to a client in your agency, the name of the agency consenting the information to you will display in the bottom section Clients with Consents from Outside agencies. When the consent is already linked to a client in your agency, the name of the agency consenting the information to you will display under the Client Profile in linked consents.

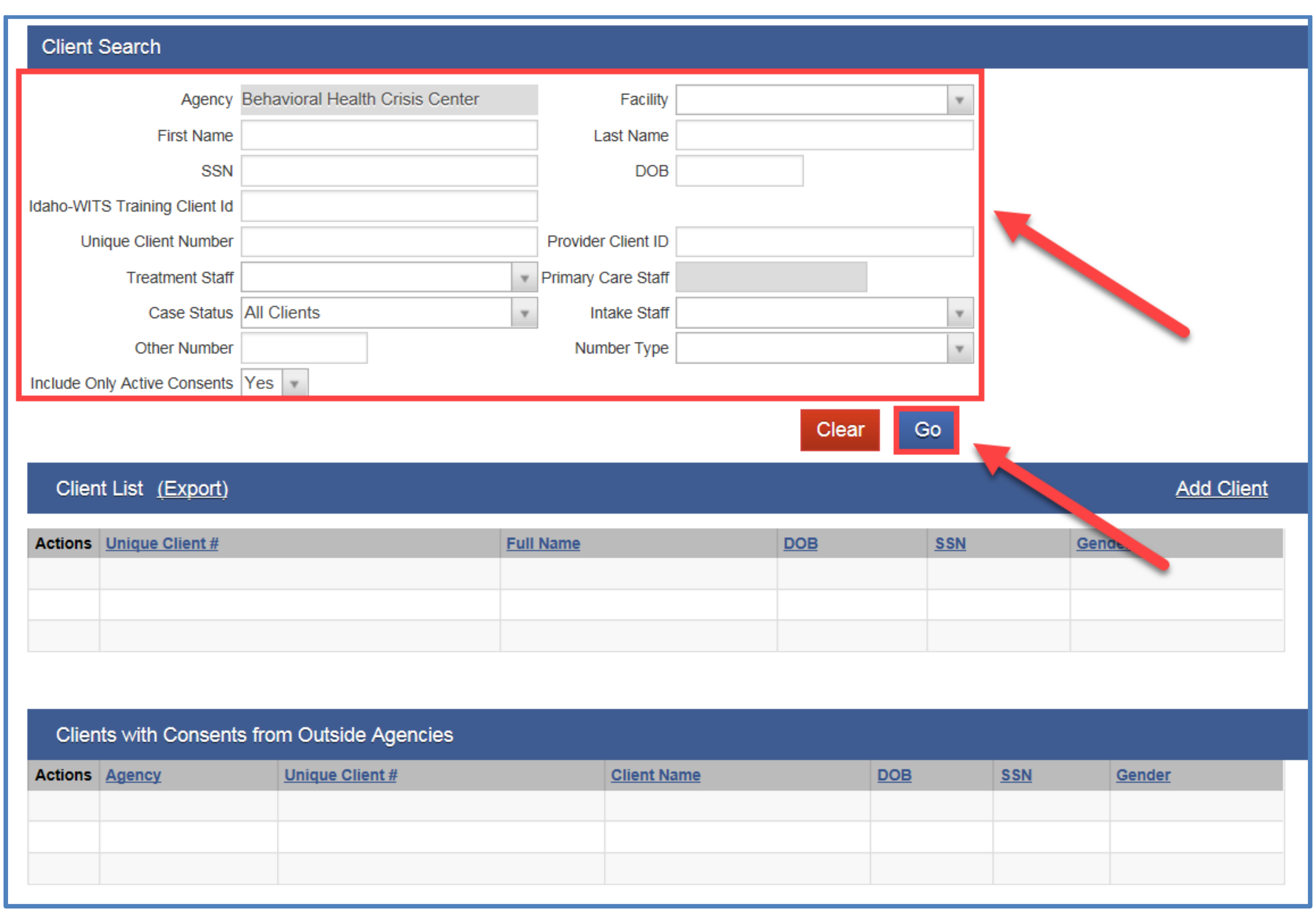
1. Begin on the Home Page.



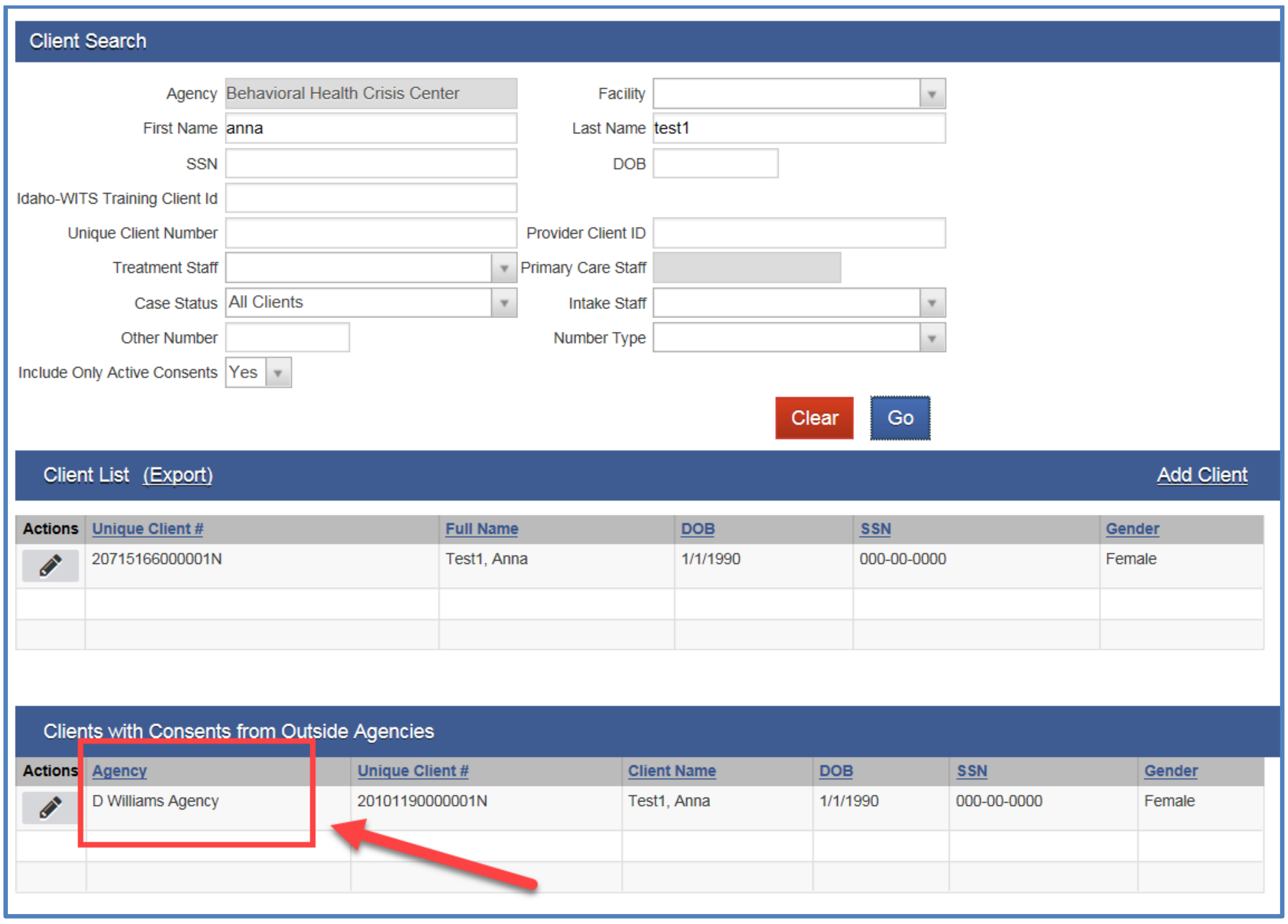
2. Click ▸ Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

To view only Active Clients, select a Case Status of Clients with Open Cases.



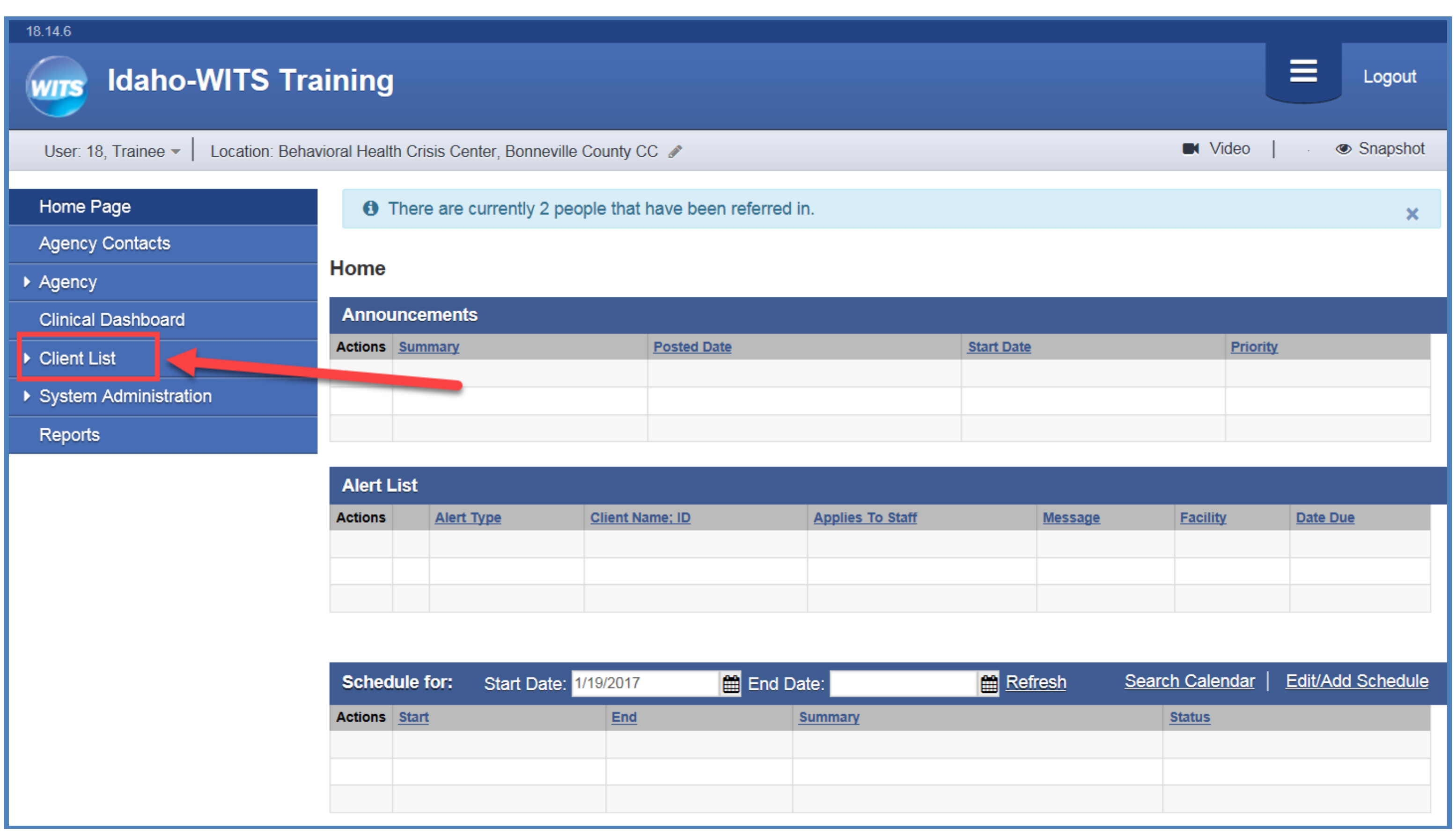
3. Enter your search criteria and click Go .



4. When the Consent is not linked to a client in your agency, the name of the agency consenting the information to you will display in the bottom section Clients with Consents from Outside agencies. **The name of the agency that sent you the Consent is located in the Agency column.**

OR follow the instructions below to see consents that are already linked in your agency.

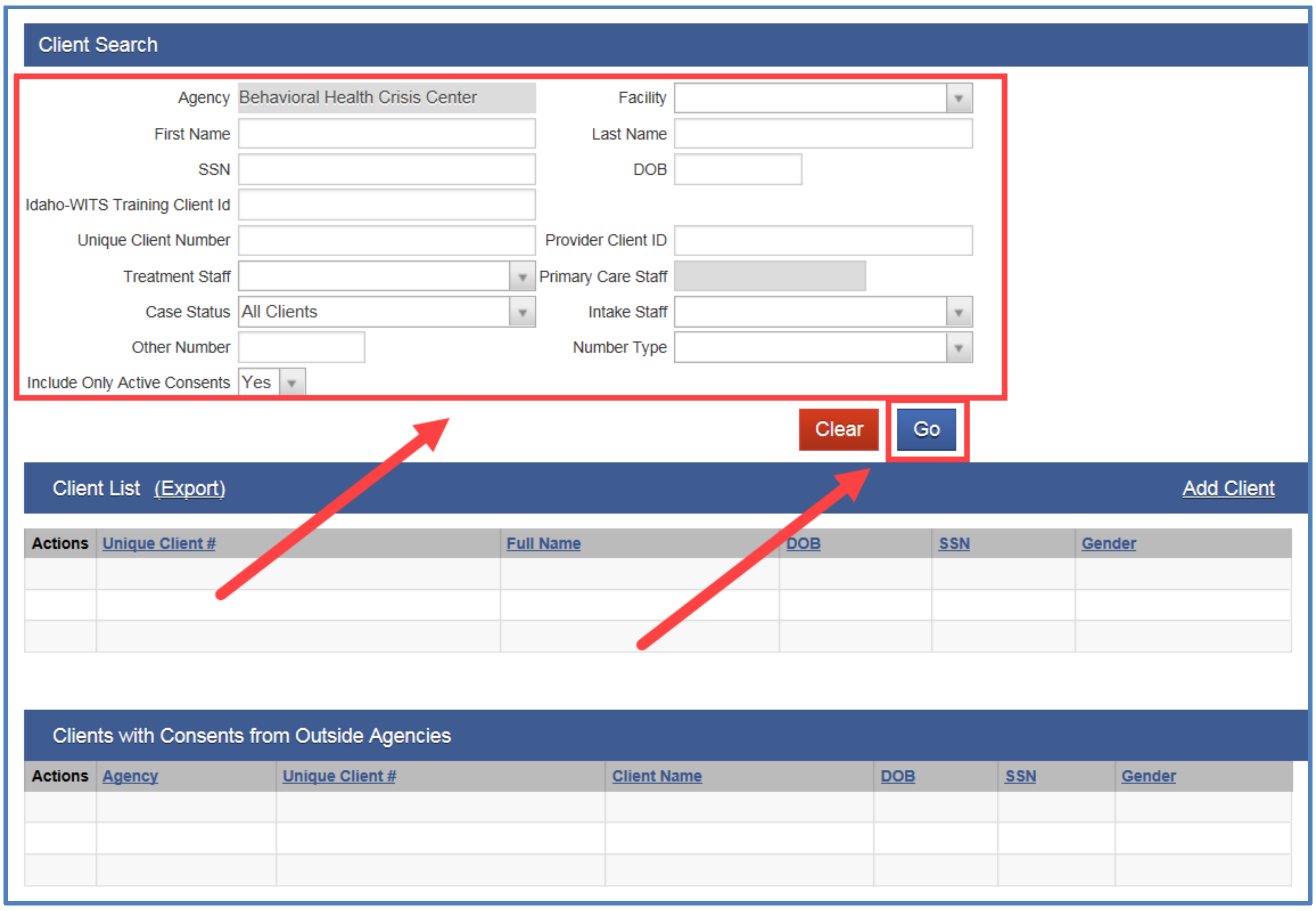
5. Begin on the Home Page.



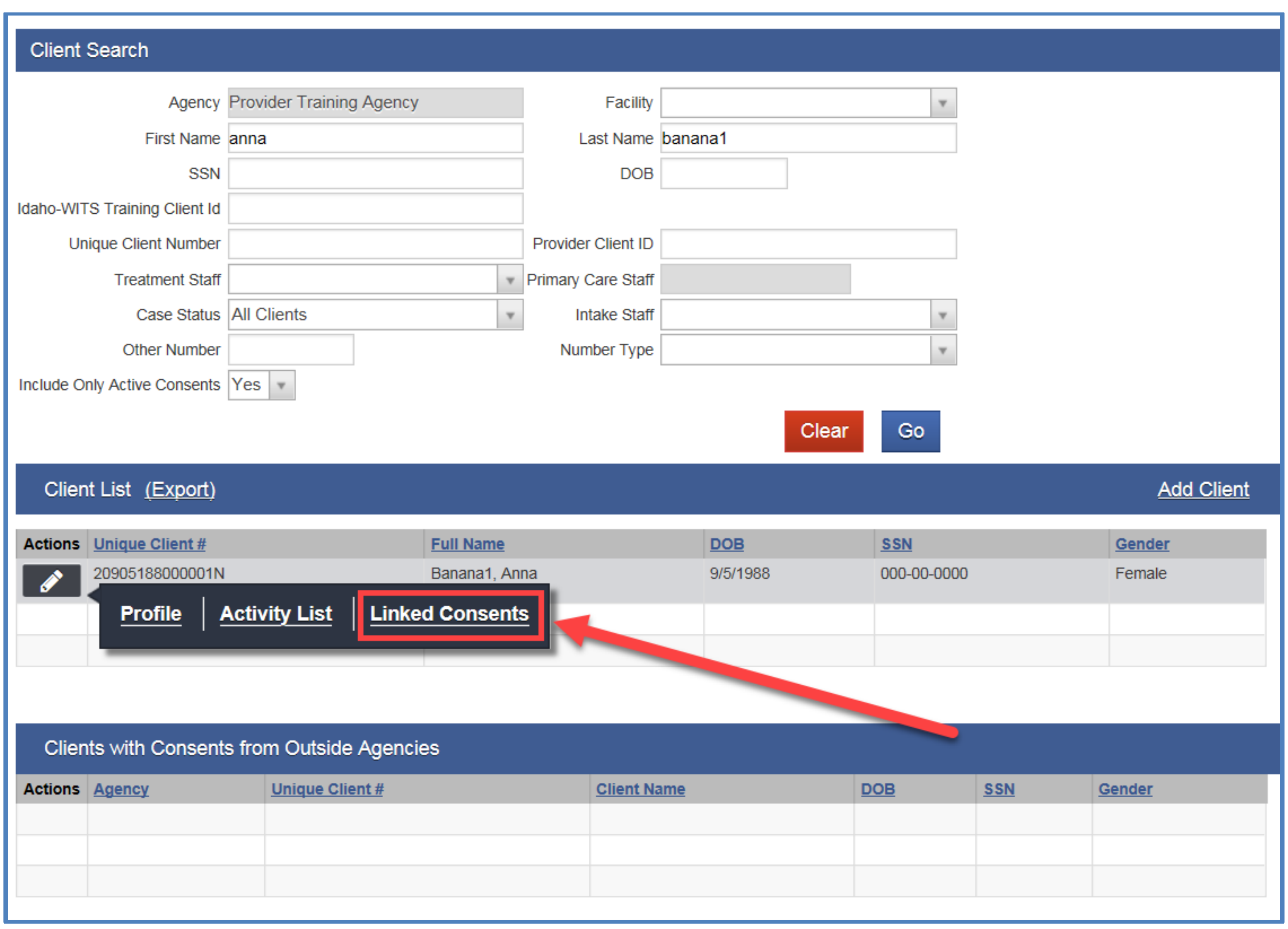
6. Click ▸ Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

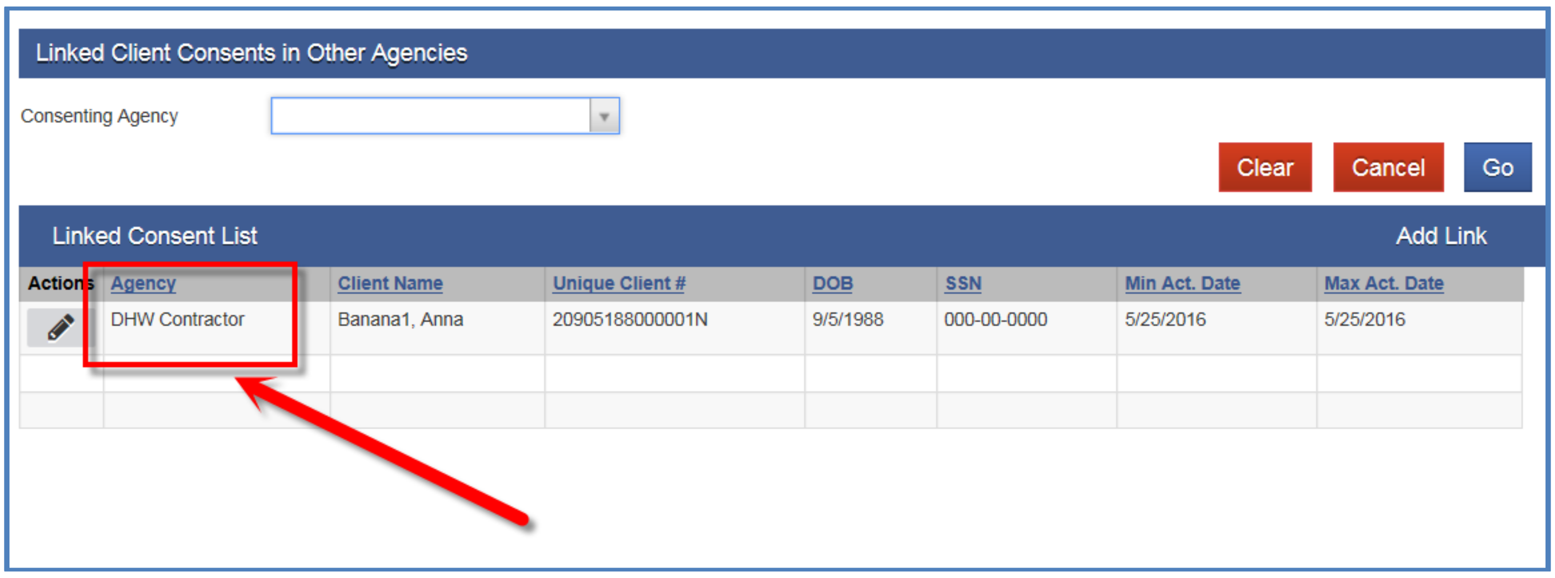
To view only Active Clients, select a Case Status of Clients with Open Cases.



7. Enter your search criteria and click Go.



8. Hover over the and click **Linked Consents** under Actions. When the consent is already linked to a client in your agency, the name of the agency consenting the information to you will display under the Client Profile in linked consents.

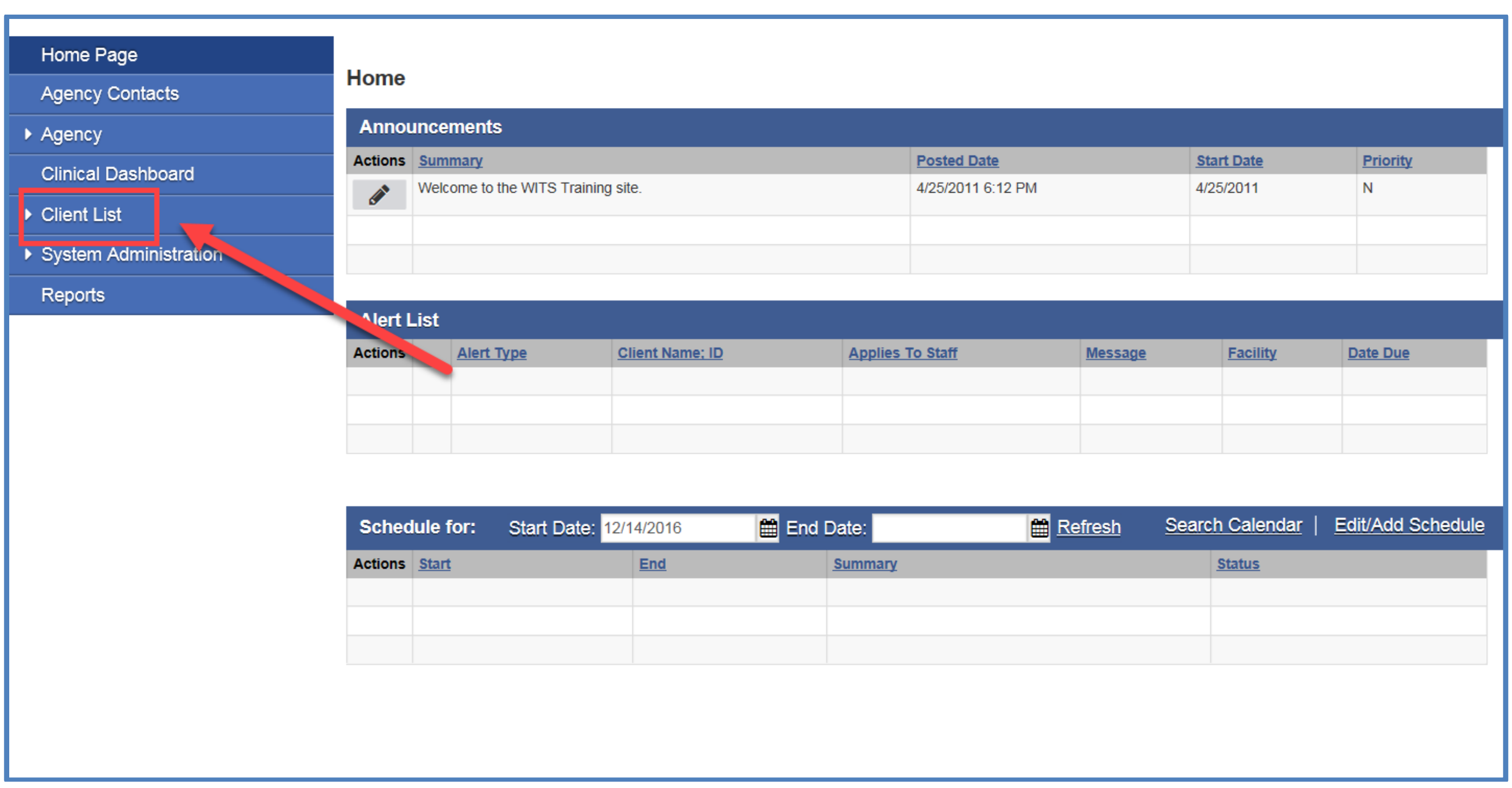


9. The name of the agency that sent you the consent is located in the Agency column.

Reviewing Clients with Consents from Outside Agencies

When the consent is not linked to a client in your agency, the name of the agency consenting the information to you will display in the bottom section Clients with Consents from Outside agencies.

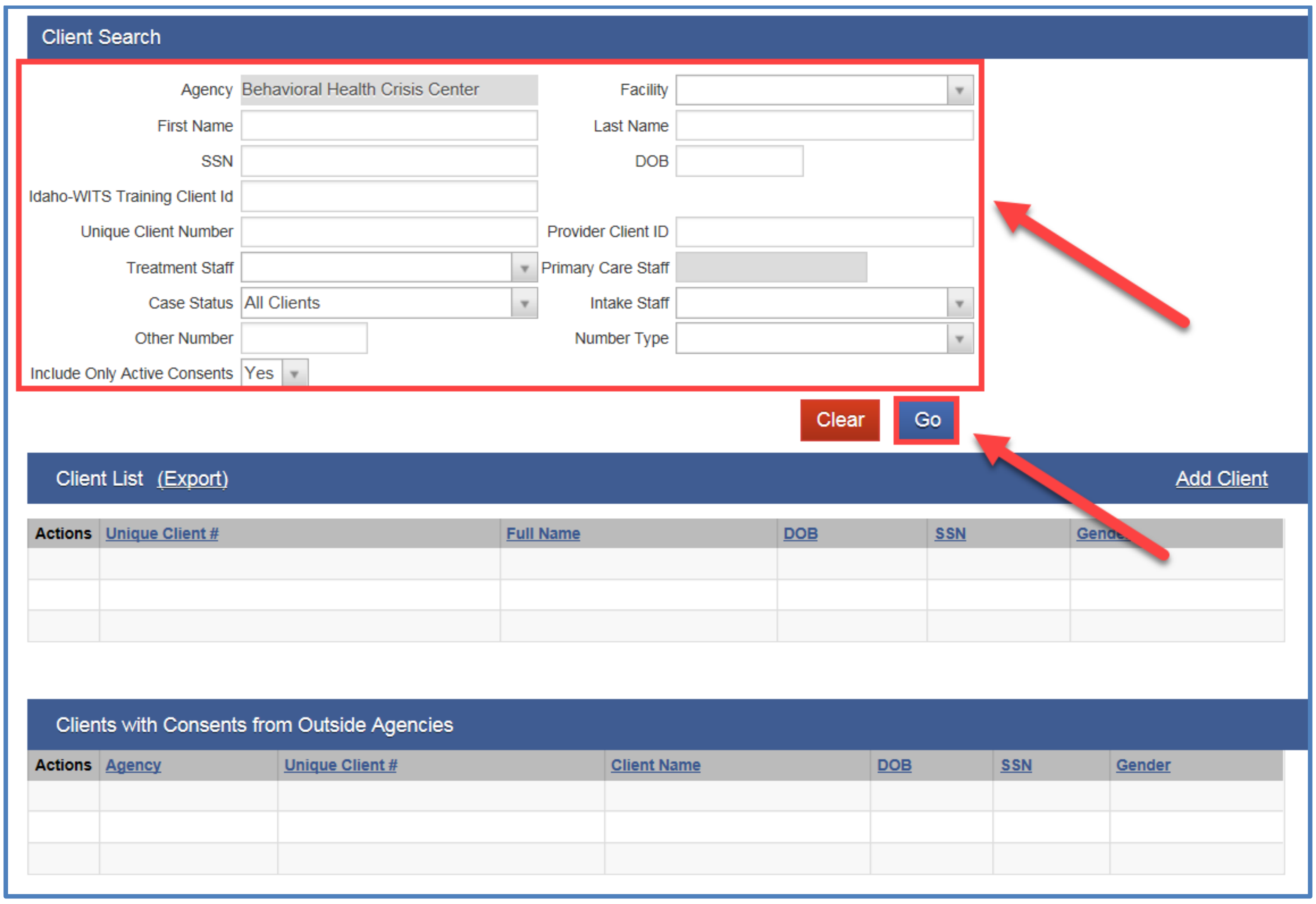
1. Begin on the Home Page.



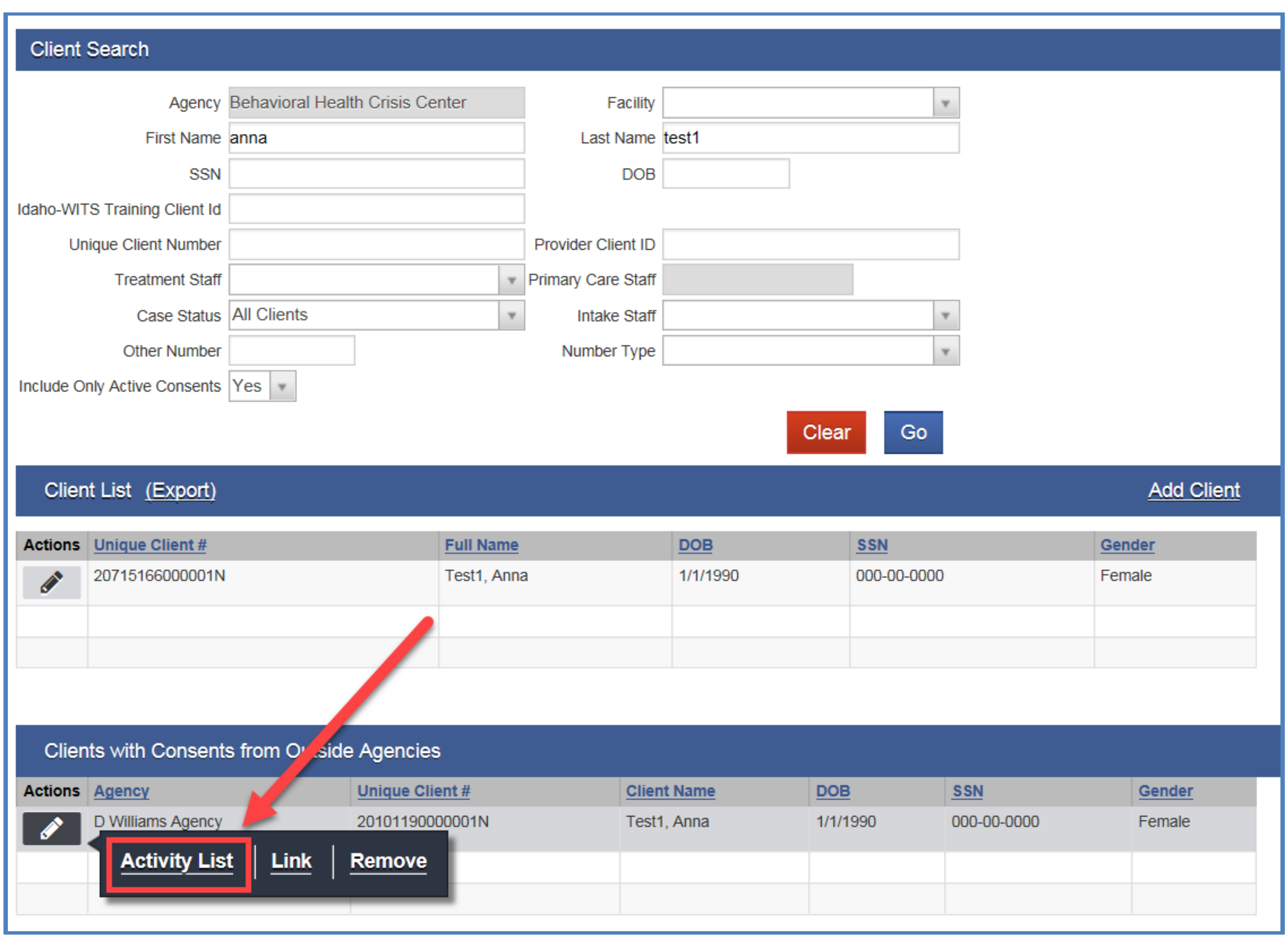
2. Click Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

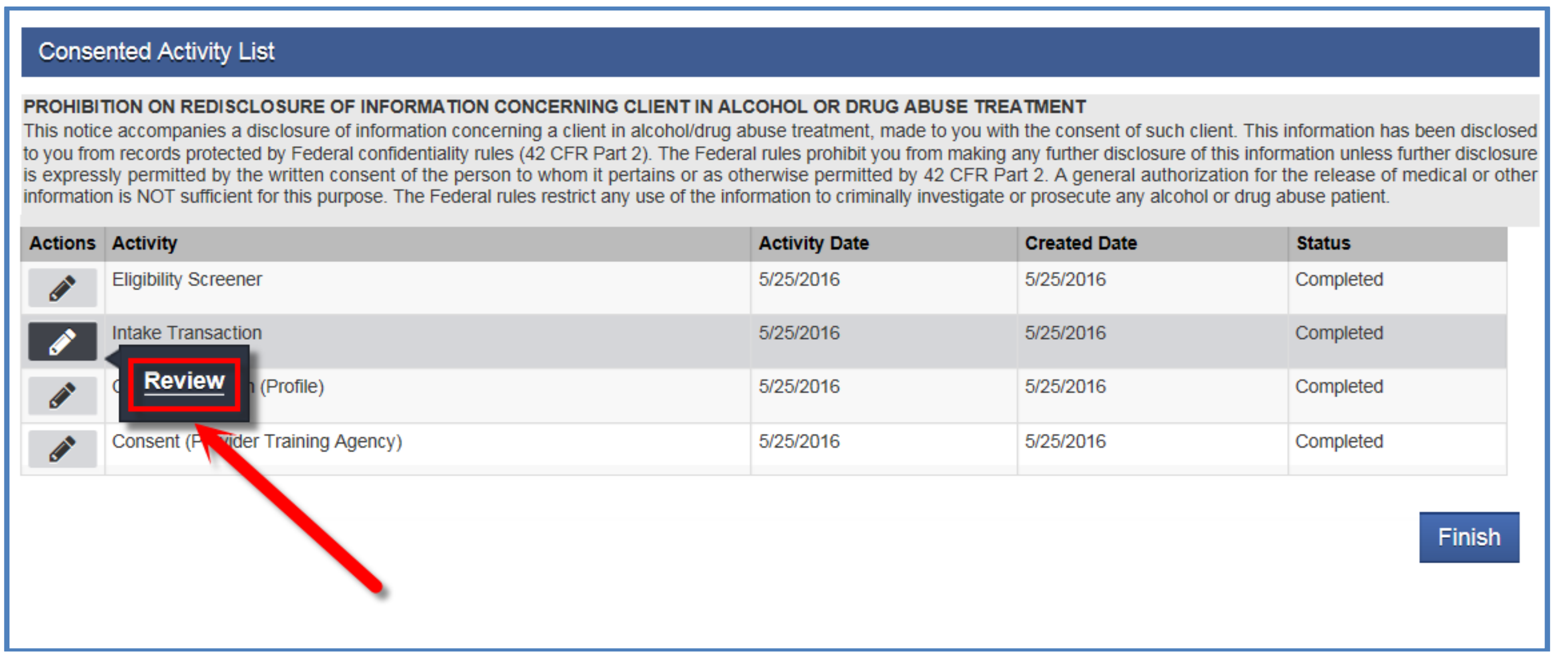
To view only Active Clients, select a Case Status of Clients with Open Cases.



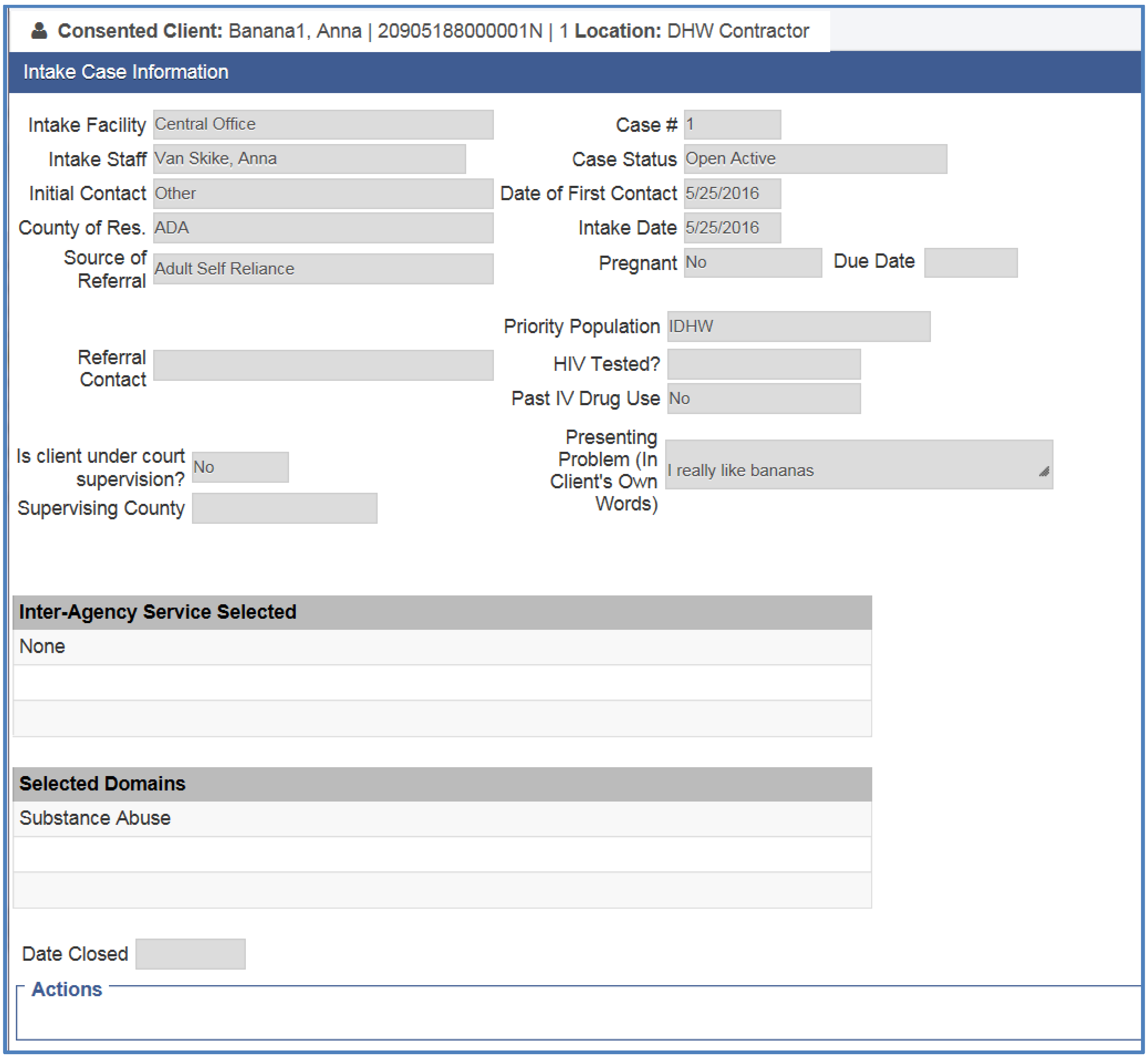
3. Enter your search criteria and click  .



4. Hover over the  and click  under Actions under Clients with Consents from Outside Agencies.

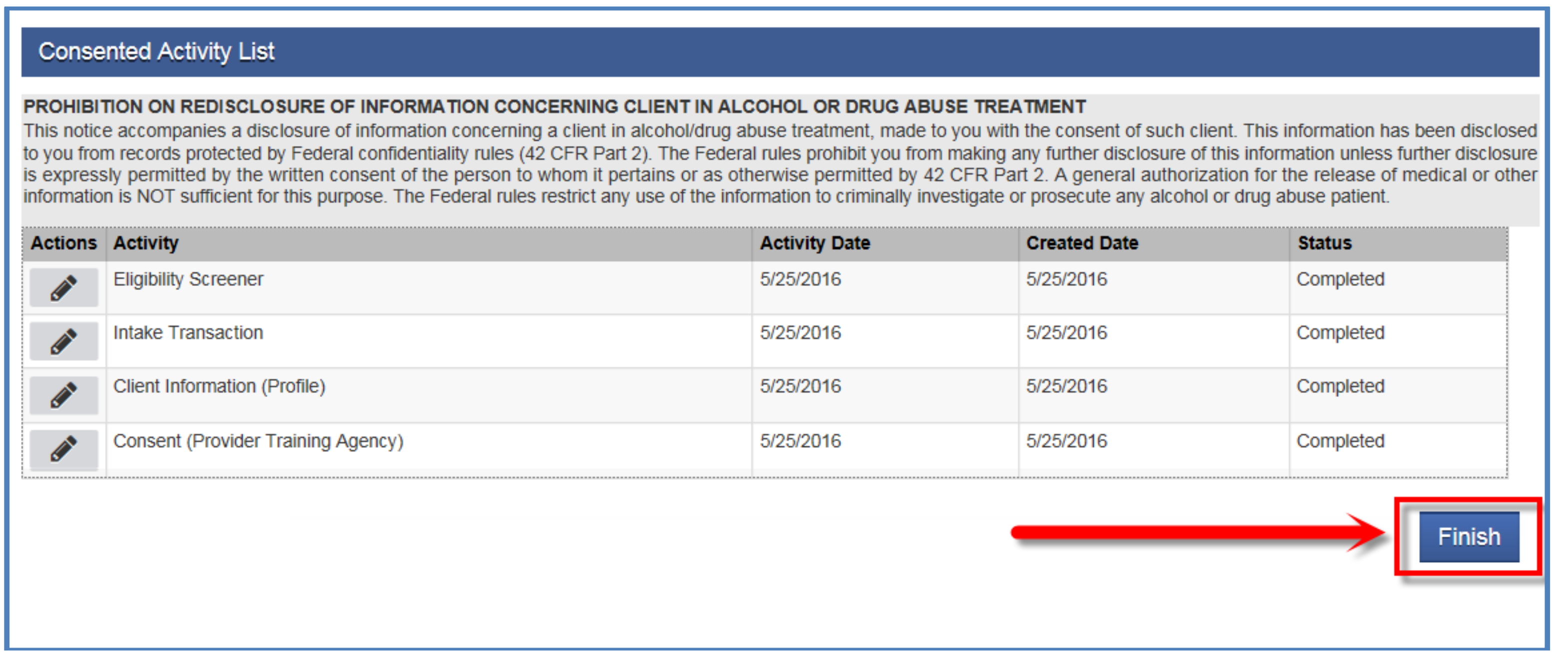


5. Hover over the  and click **Review** under Actions to view a specific activity.



6. The activity displays as Read Only in a separate window. Close the window when finished.

7. Click Return to Consented Activity List.

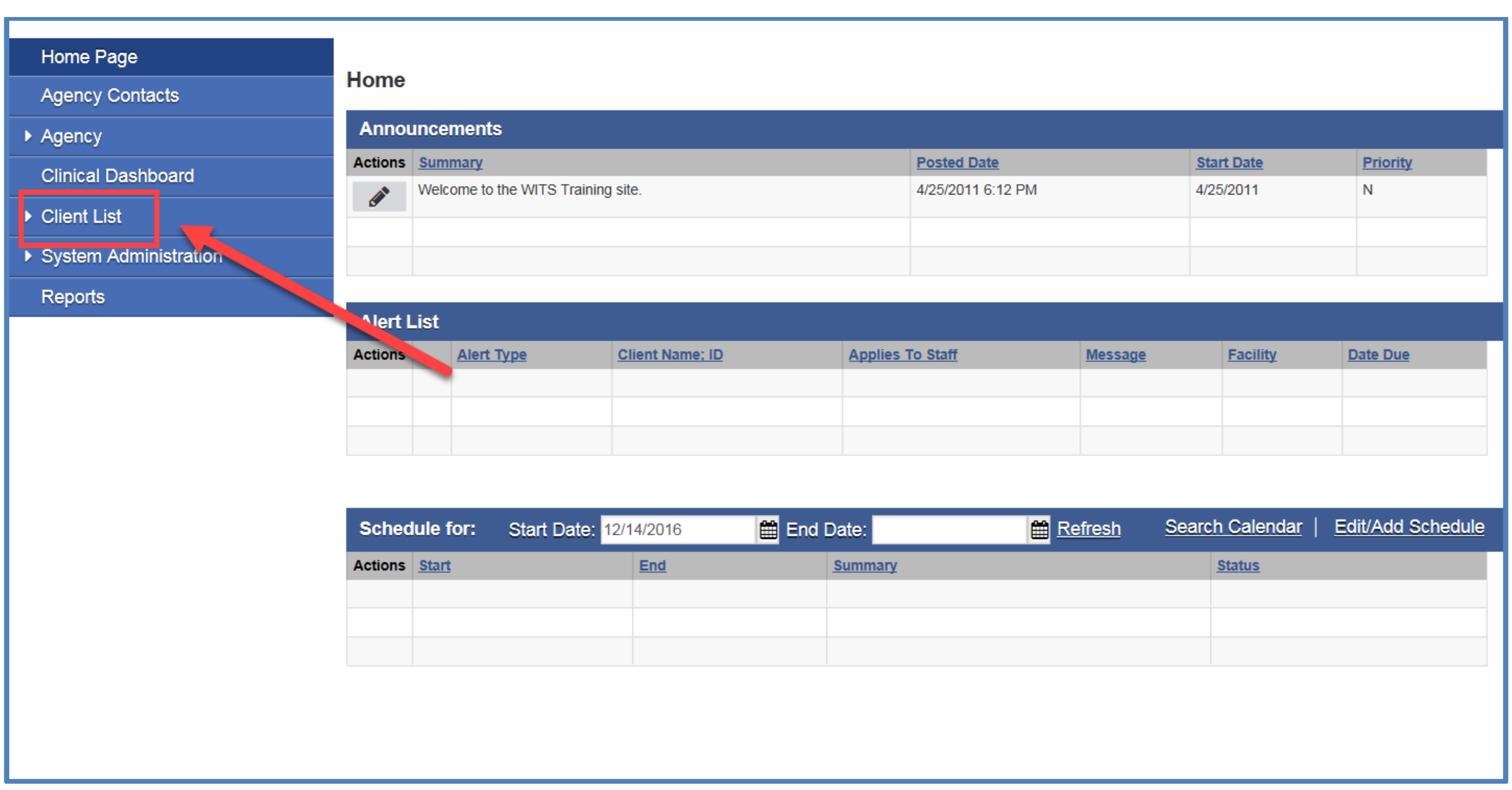


8. Click Finish.

Linking Consents

When a client is referred to your agency in WITS, always search for the client and link the consent before accepting the Referral.

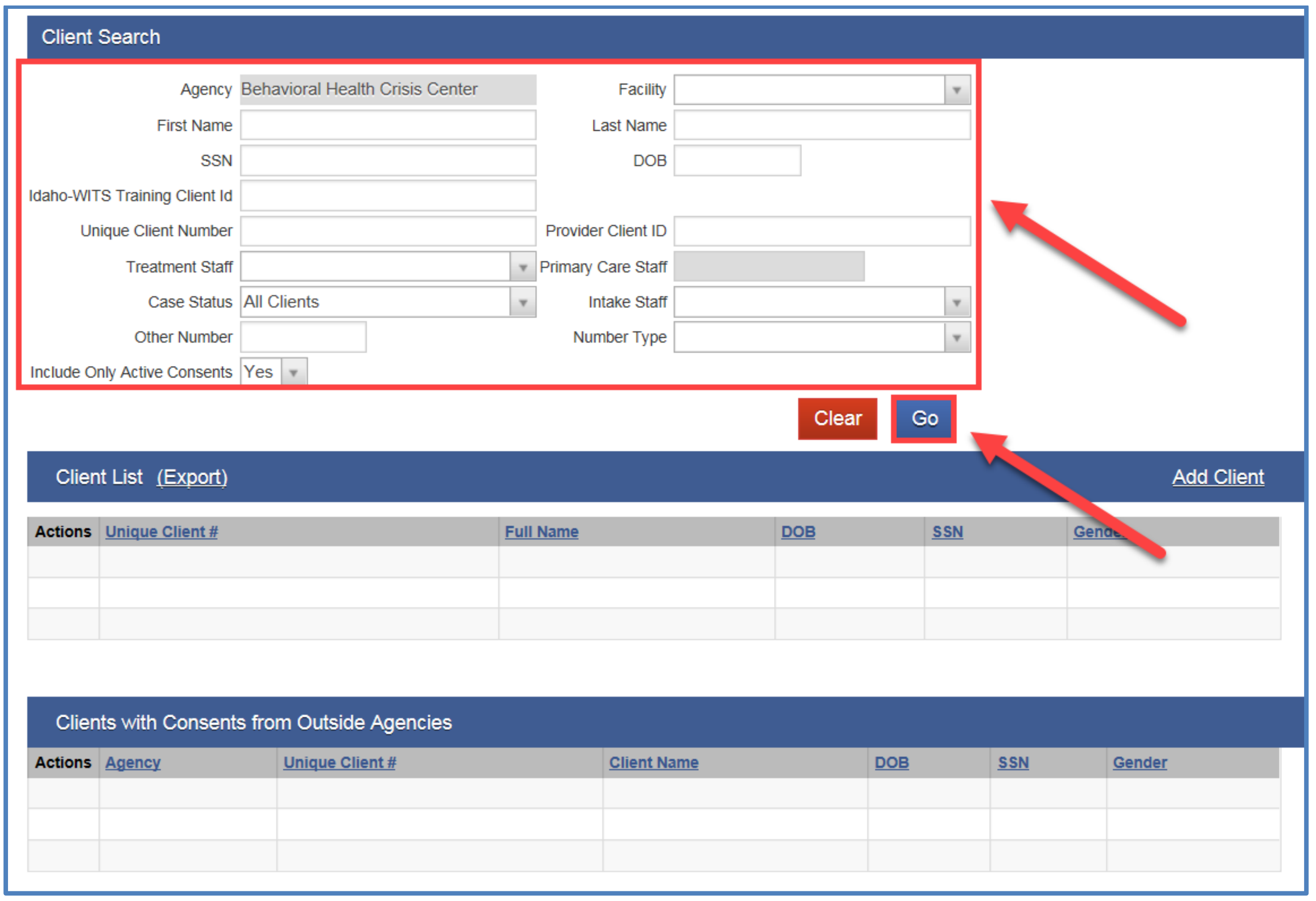
1. Begin on the Home Page.



2. Click Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

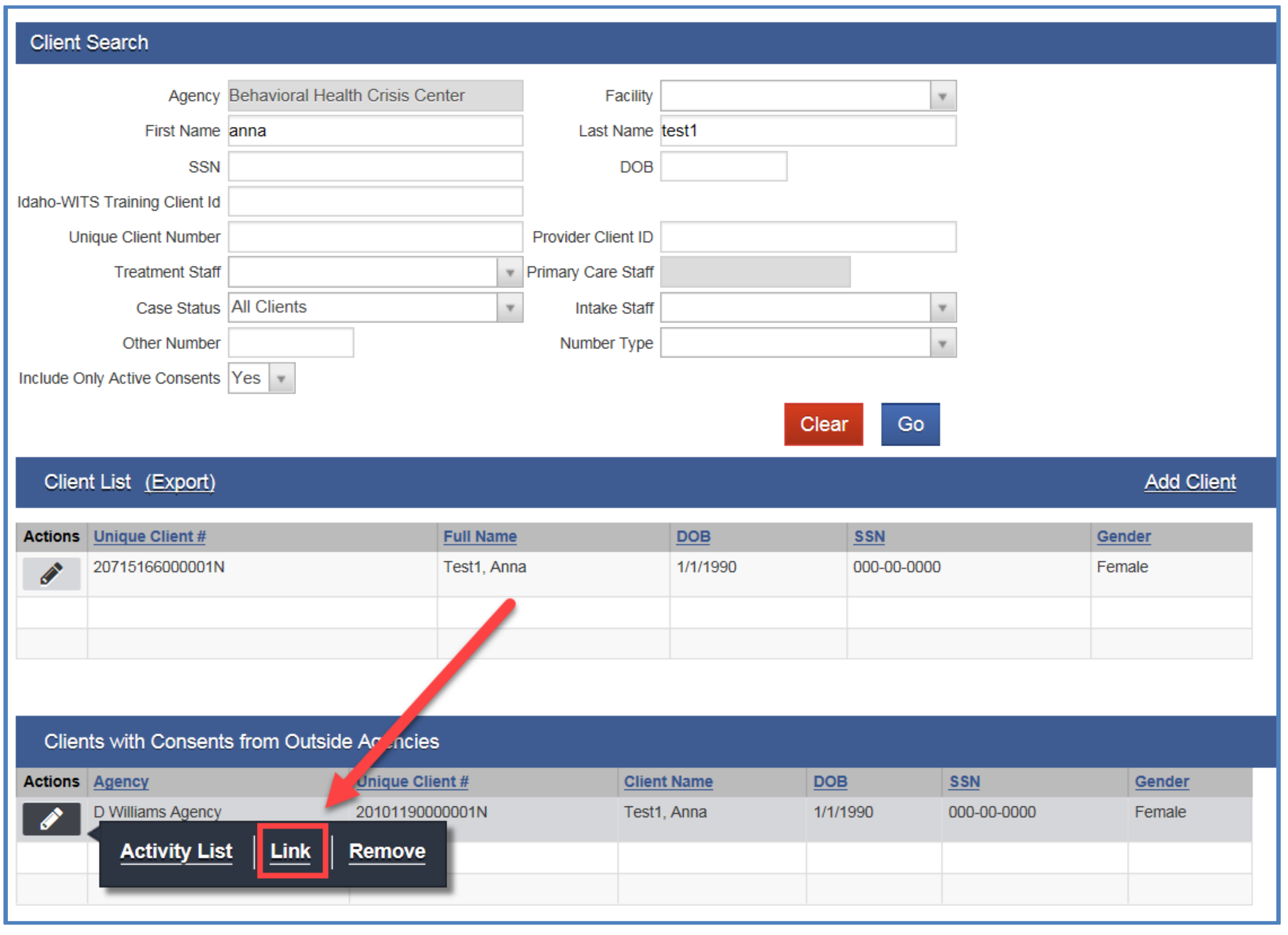
To view only Active Clients, select a Case Status of Clients with Open Cases.

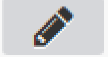


3. Enter your search criteria and click 

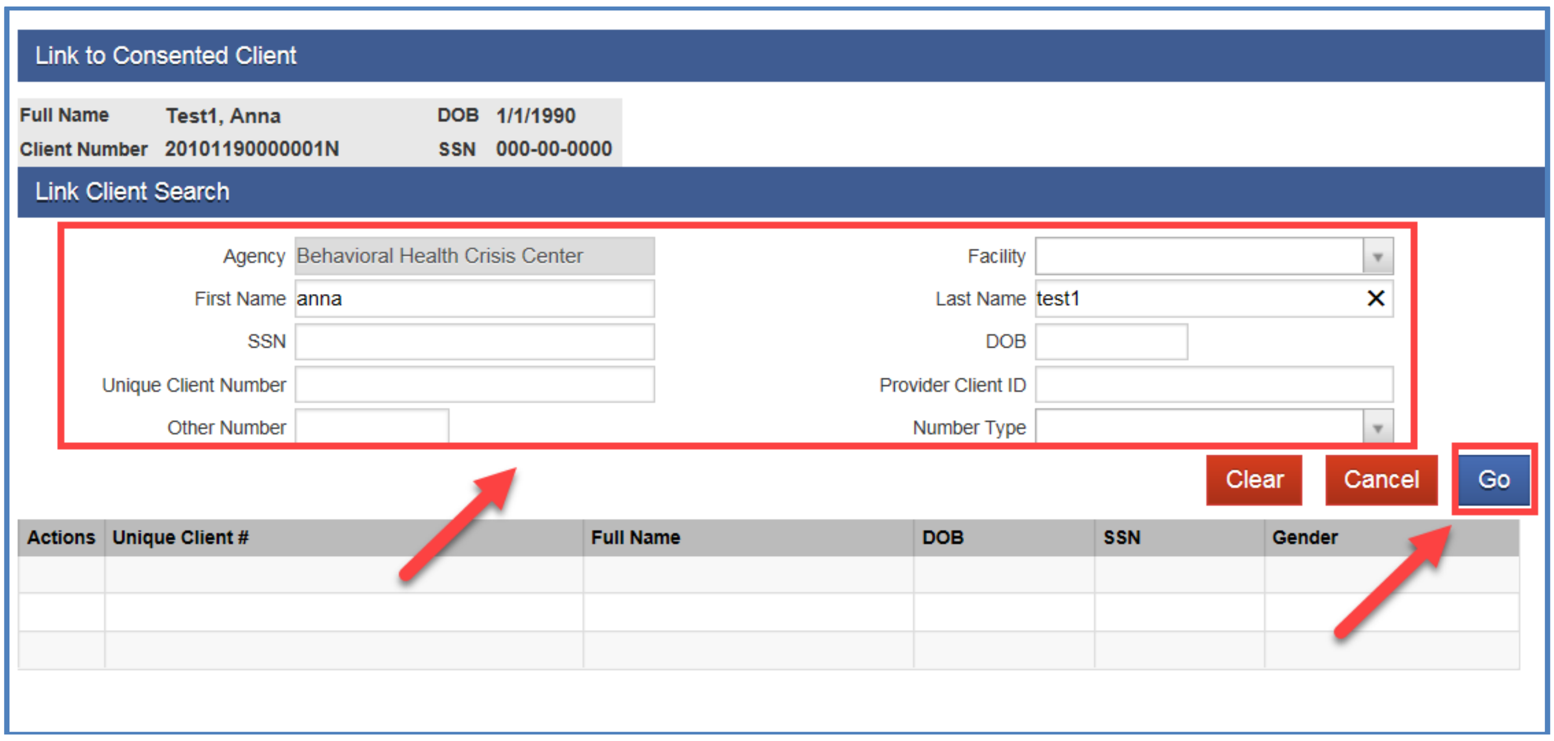
.

If you do not see your client listed in the both the Client List and in the Clients with Consents from Outside Agencies, then you do not need to link the consent.

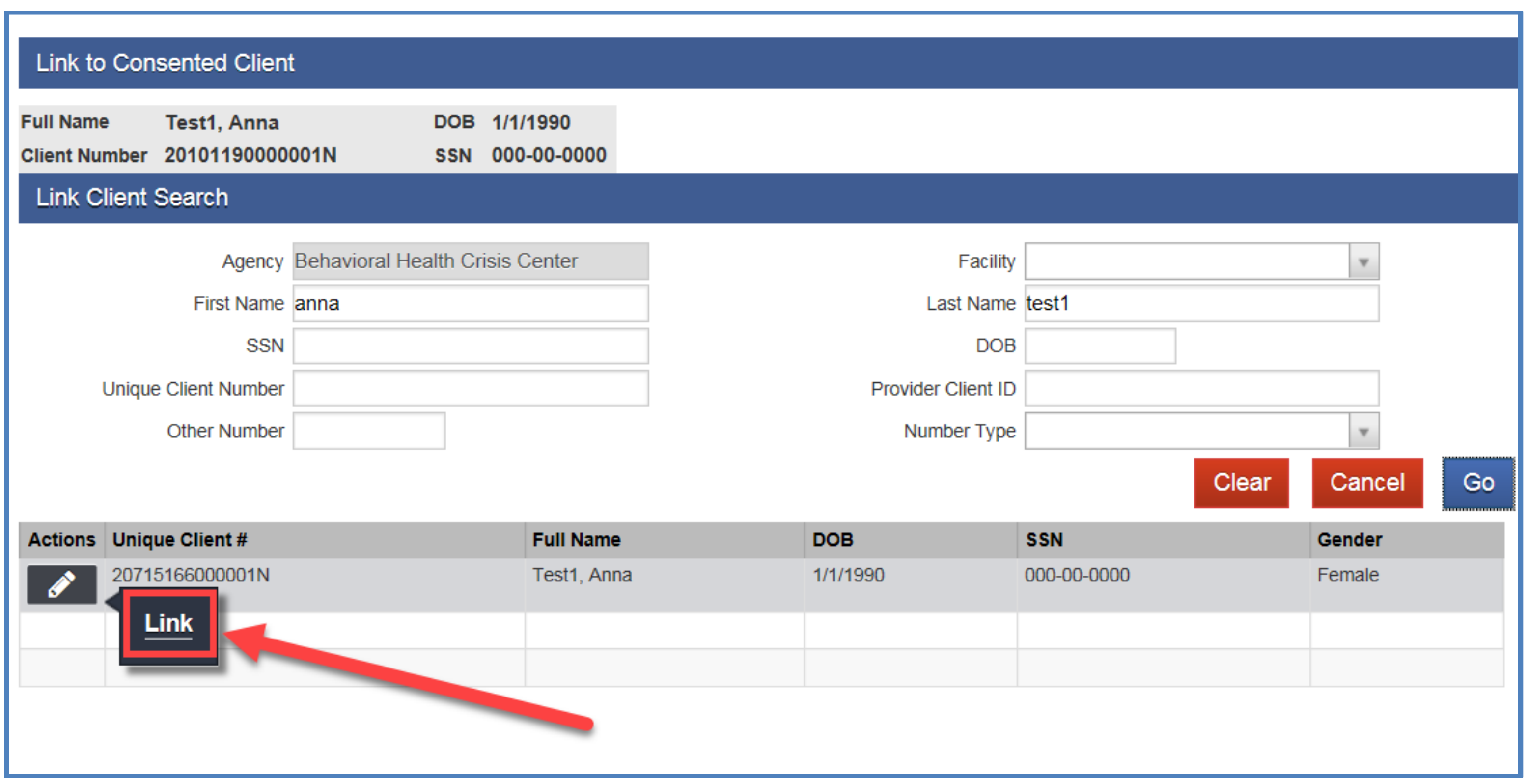


4. Hover the  and click 

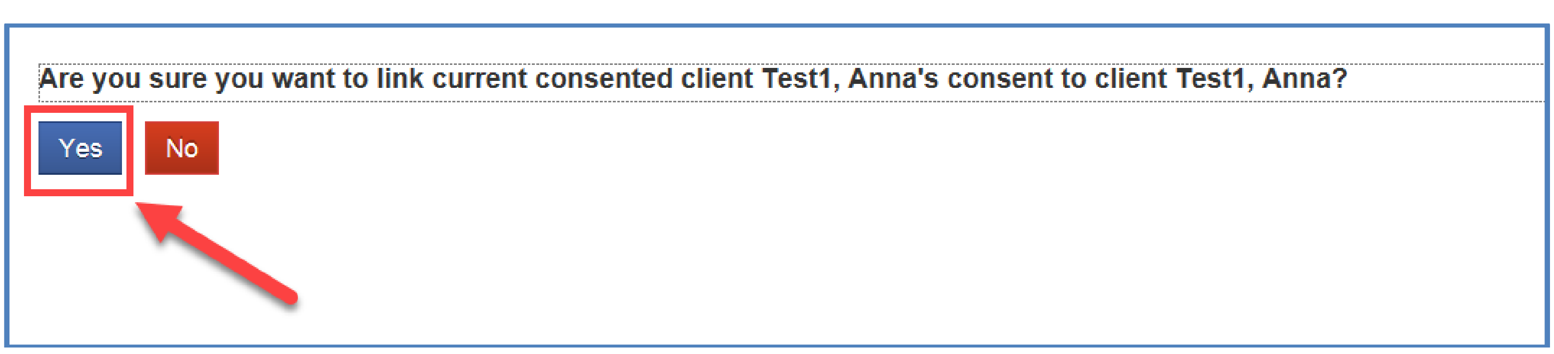
under Actions under Clients with Consents from Outside Agencies.



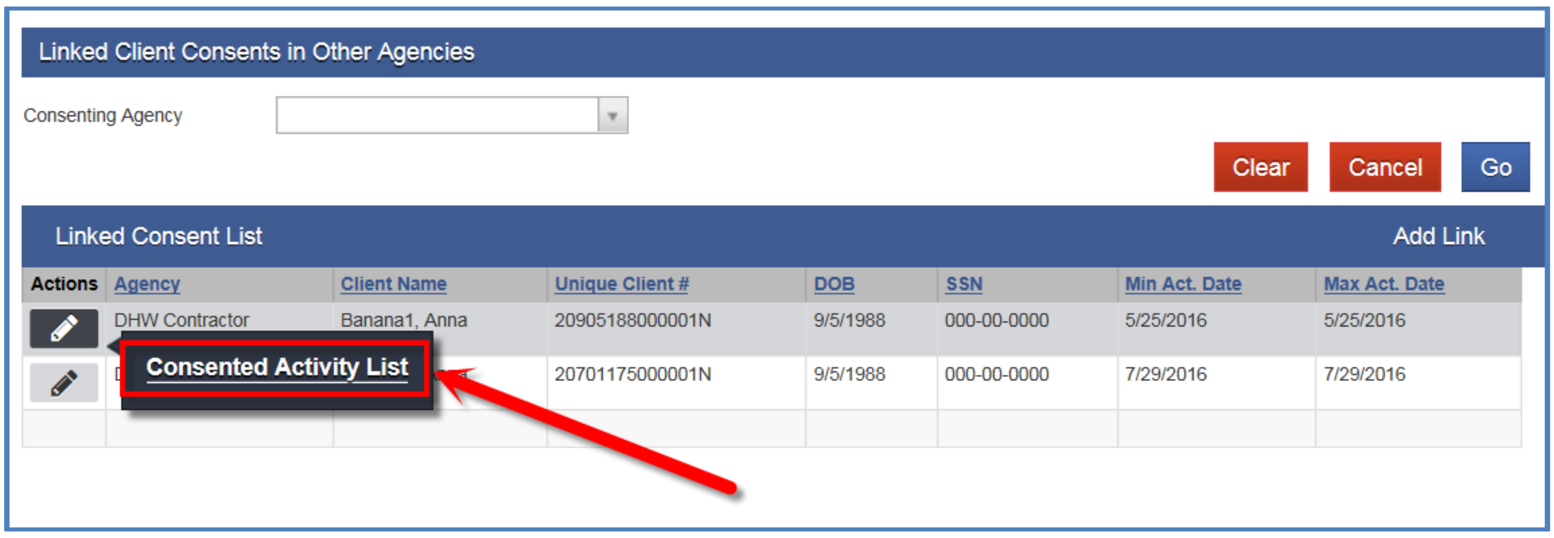
5. On the Link Client Search Page, enter your search criteria for the client in your agency and click Go.



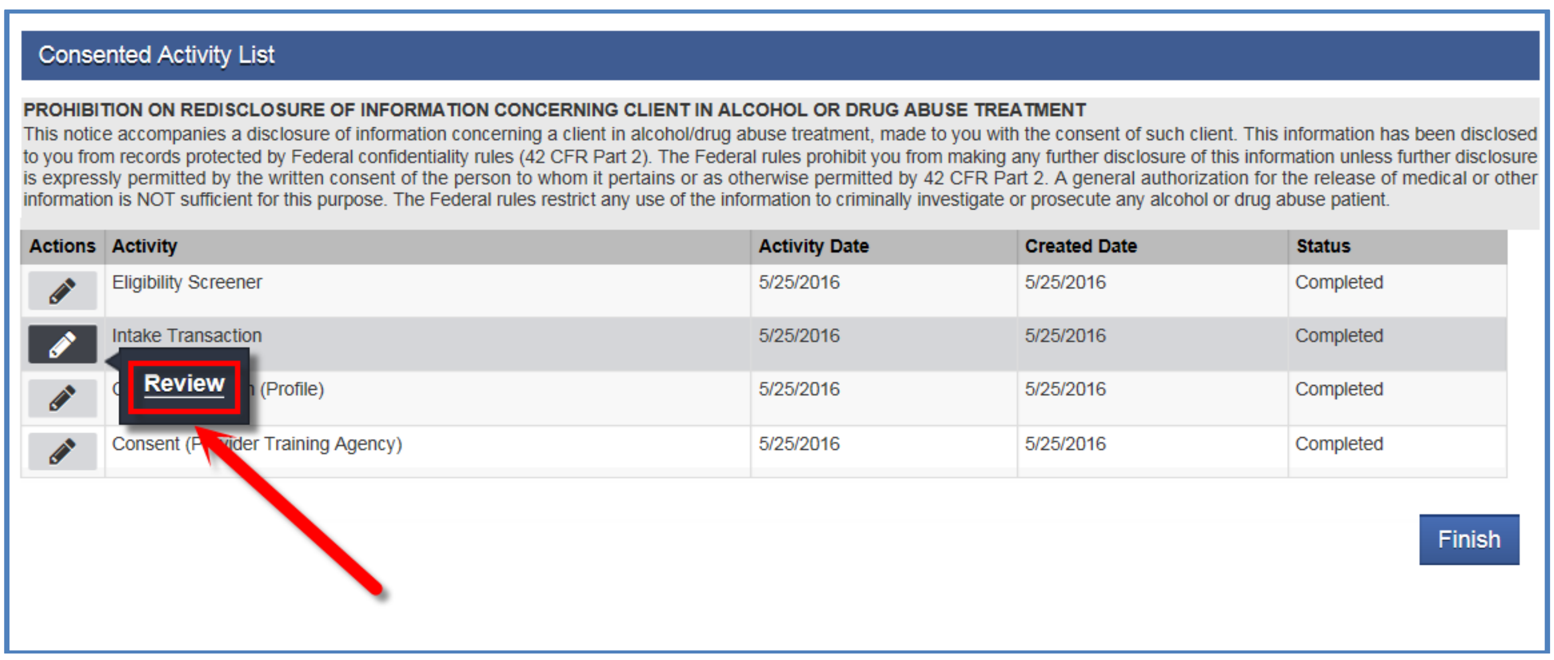
6. The information at the top of the page is (in the grayed-out section) is from the other agency. Confirm that the client in your agency (in the middle of the page) is the same as the one at the top of the page. If they are the same person, hover over the ✎ and Link under Actions.



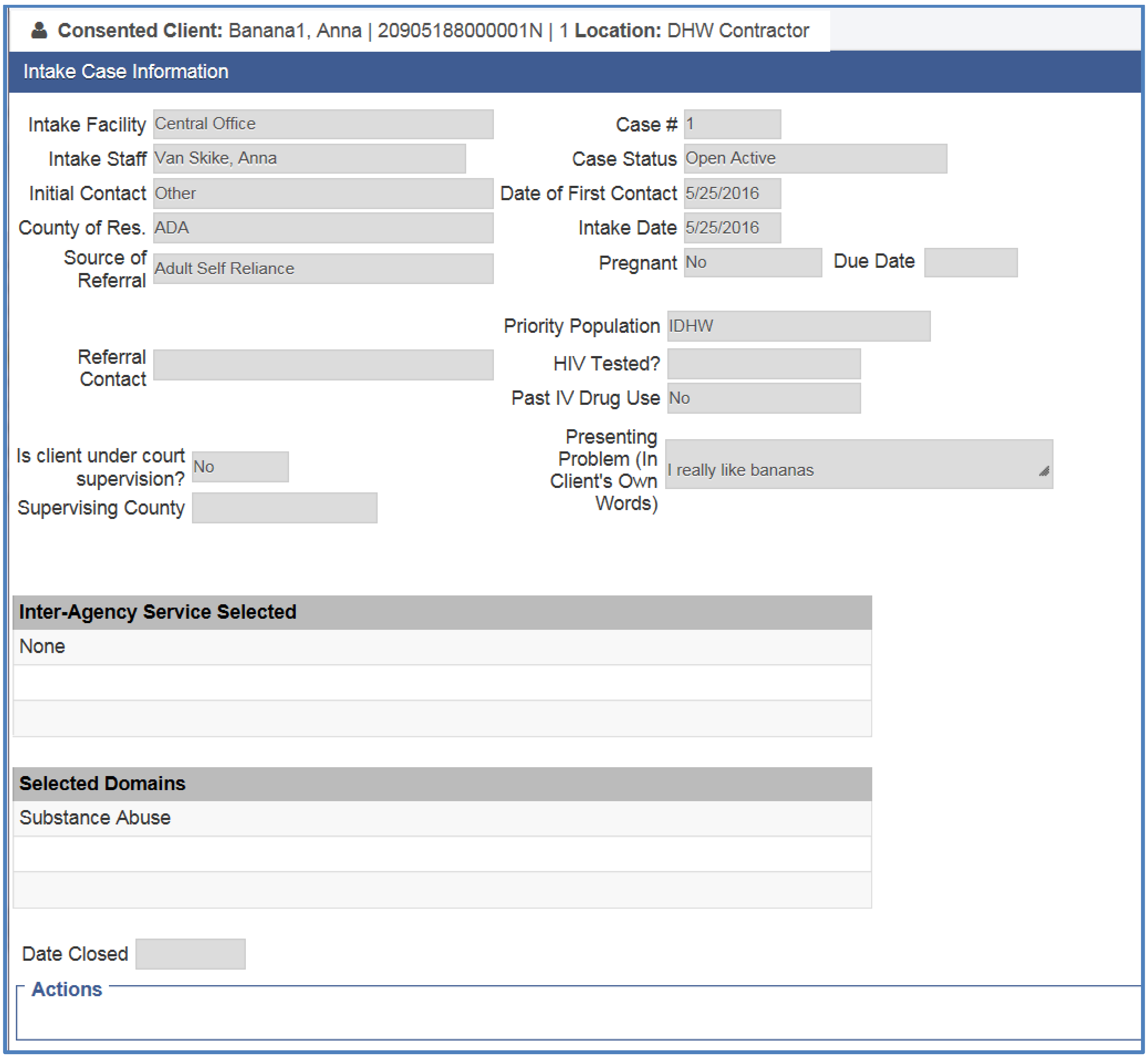
7. Click Yes to link the consented client with your existing client or click No to cancel.



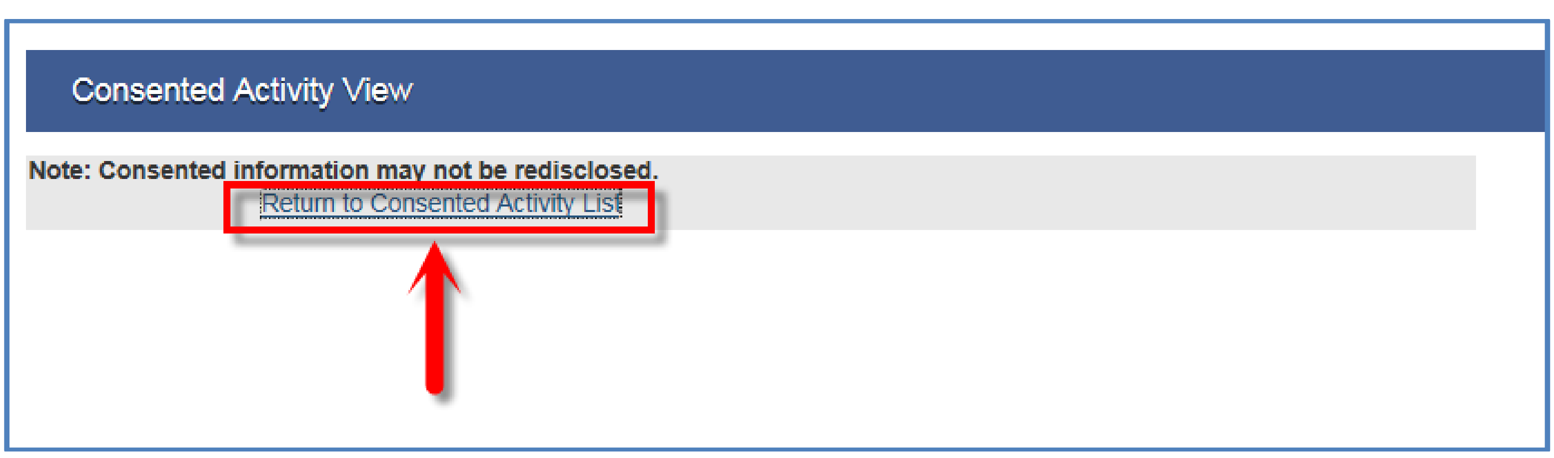
8. The Consent is now linked to the client in your agency. Hover over the and click **Consented Activity List** under Actions to review the Consented Activities.



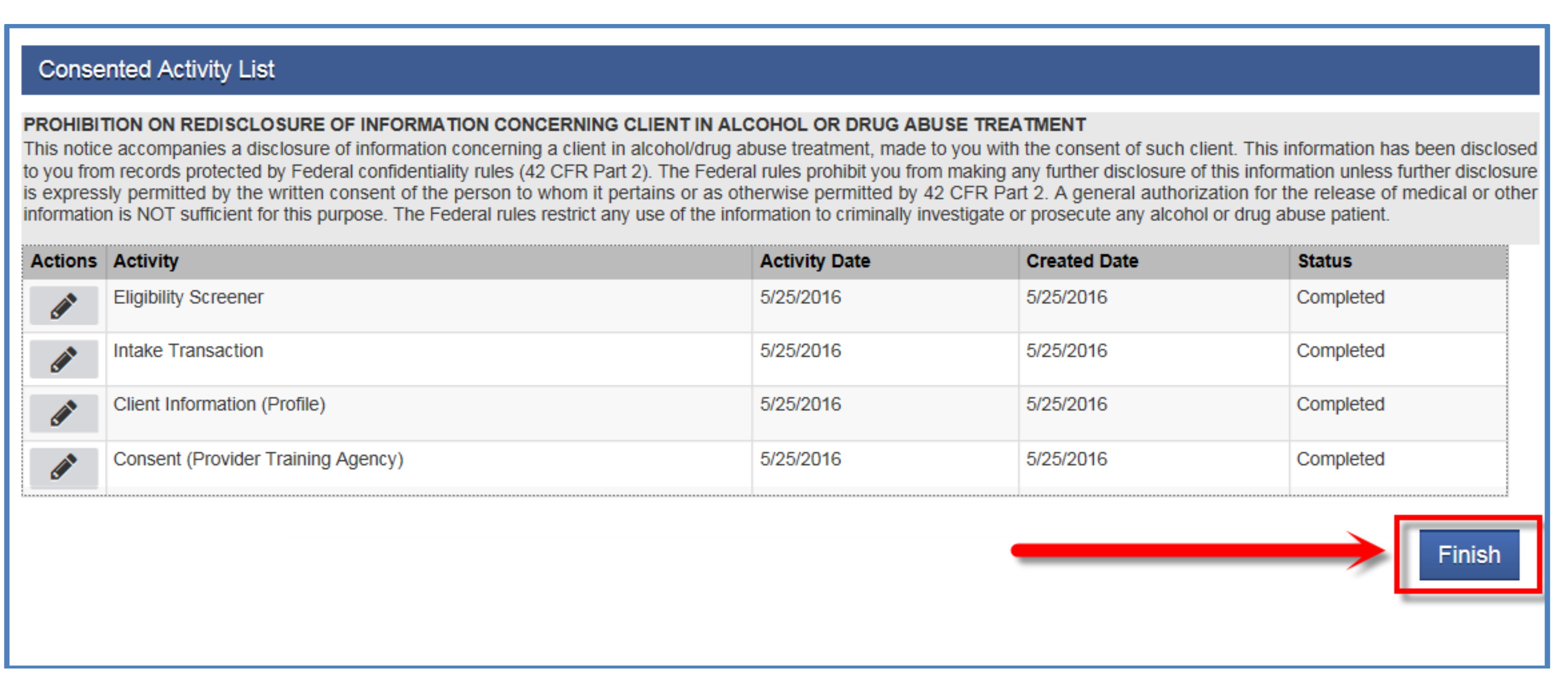
9. Hover over the and click **Review** under Actions to view the specific activity.



10. The activity displays as Read Only in a separate window. Close the window when finished.



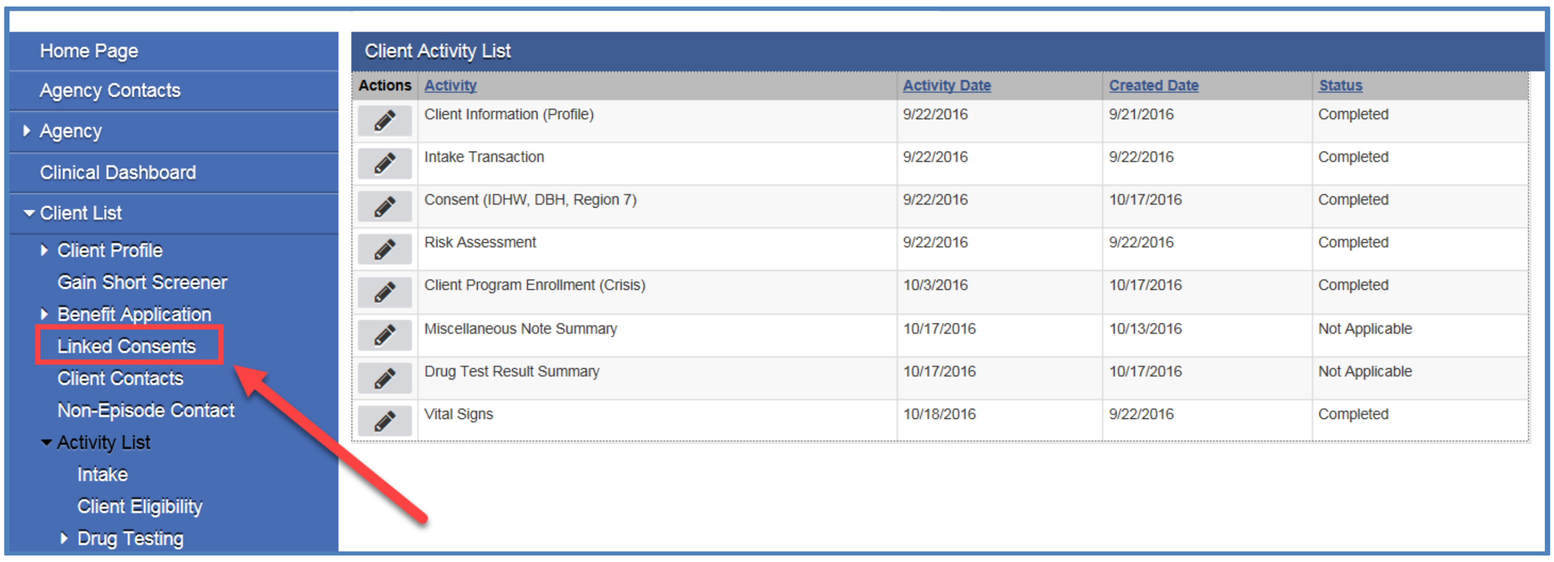
11. Click Return to Consented Activity List.



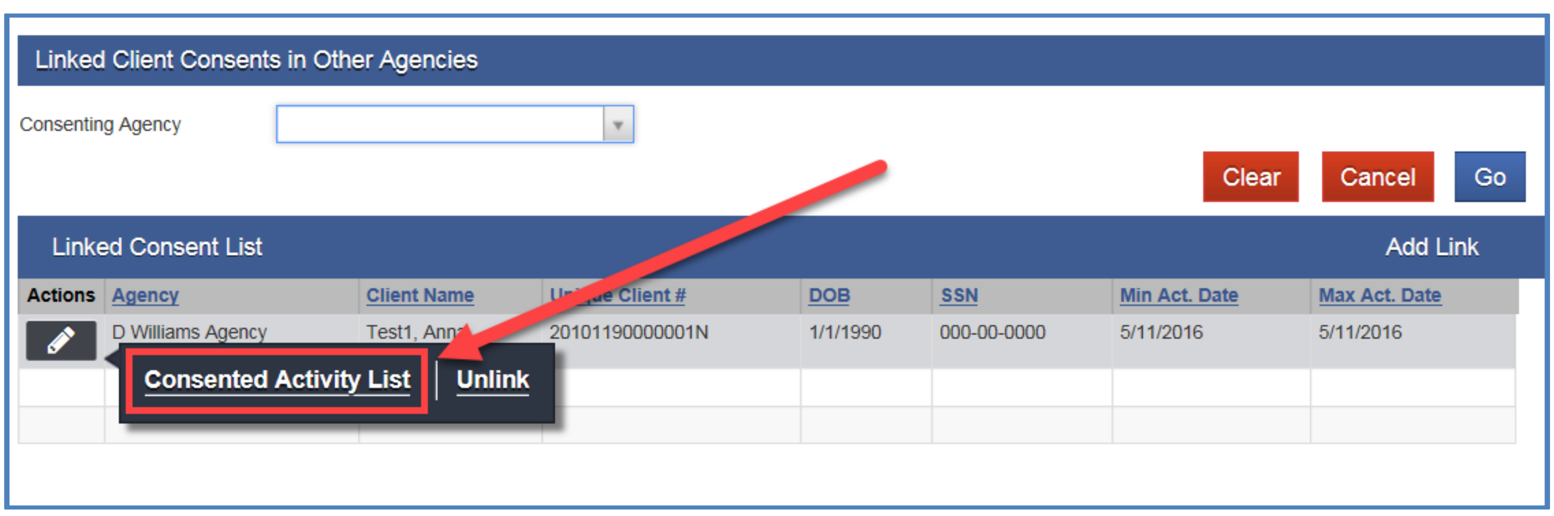
12. Click Finish.

Reviewing Linked Consents

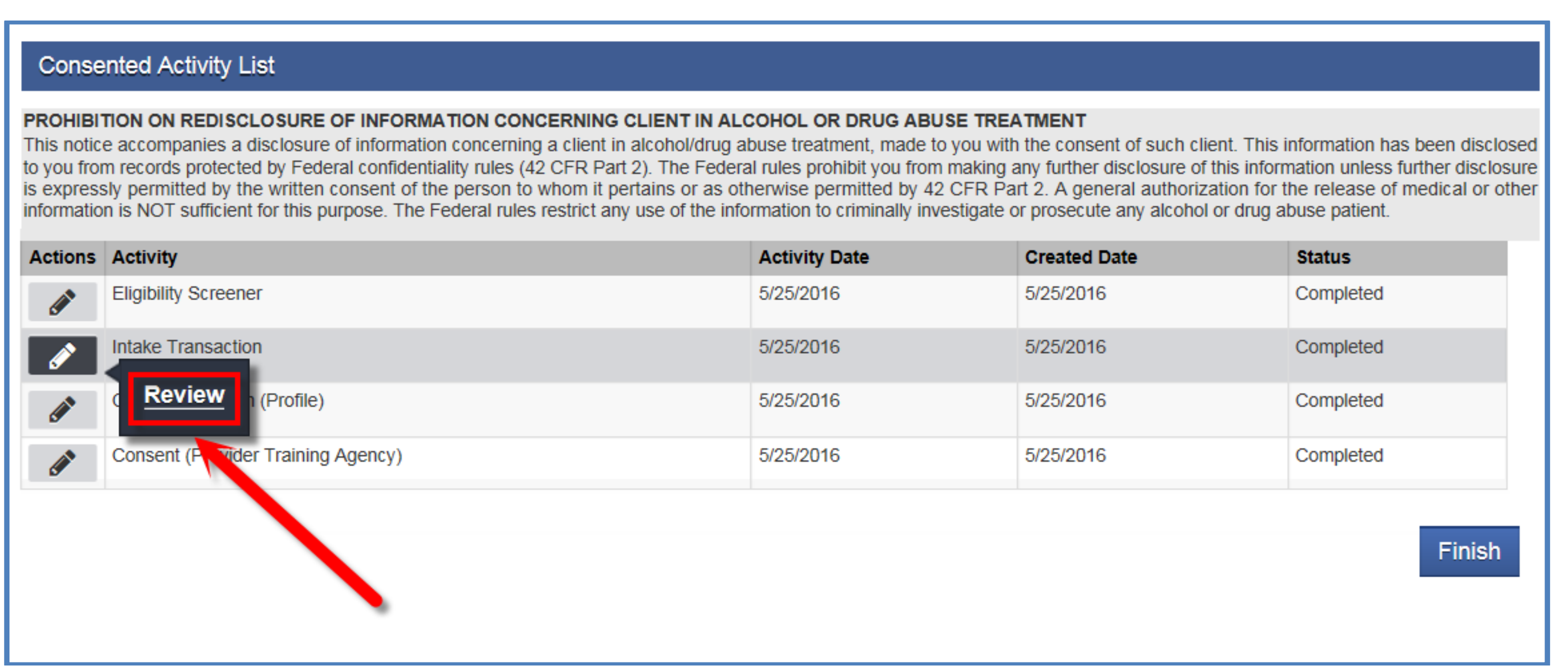
1. Begin on the Client Activity List .



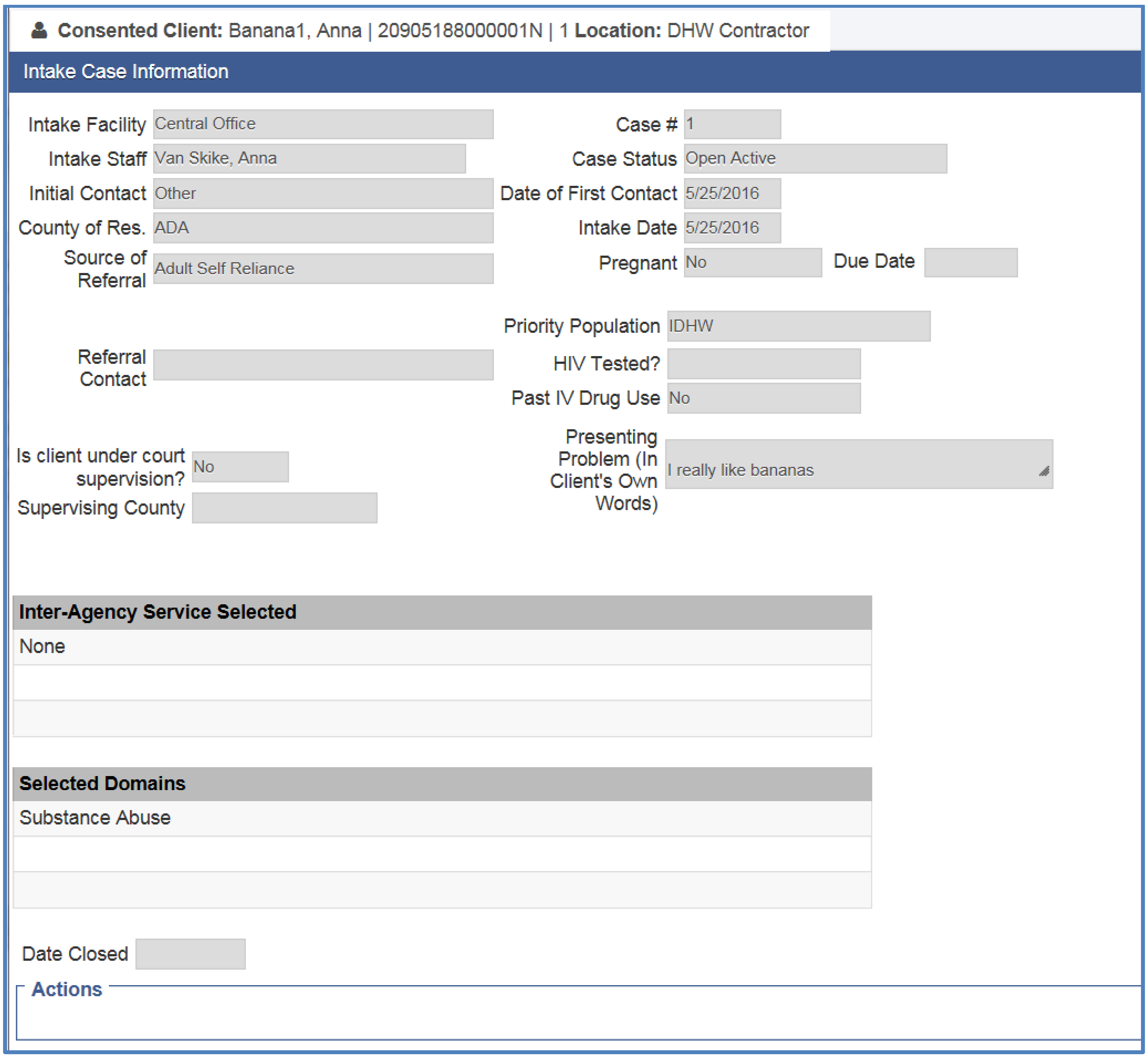
2. Once you're on the Activity List, click Linked Consents on the blue navigation pane.



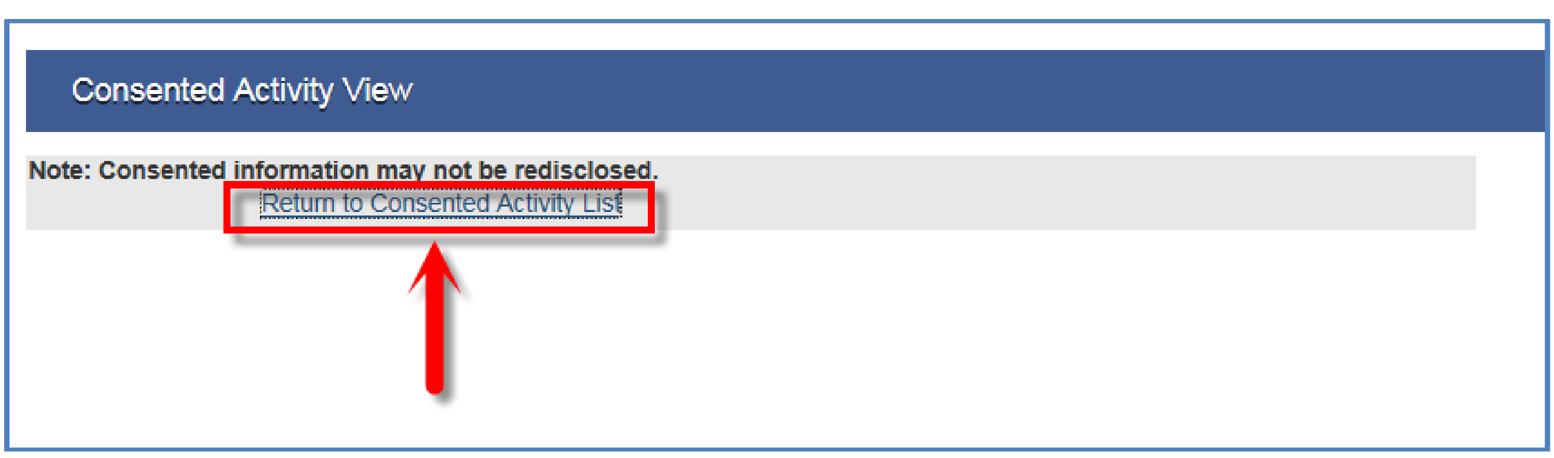
3. Hover over the and click Consented Activity List under Actions to review the Consented Activities.



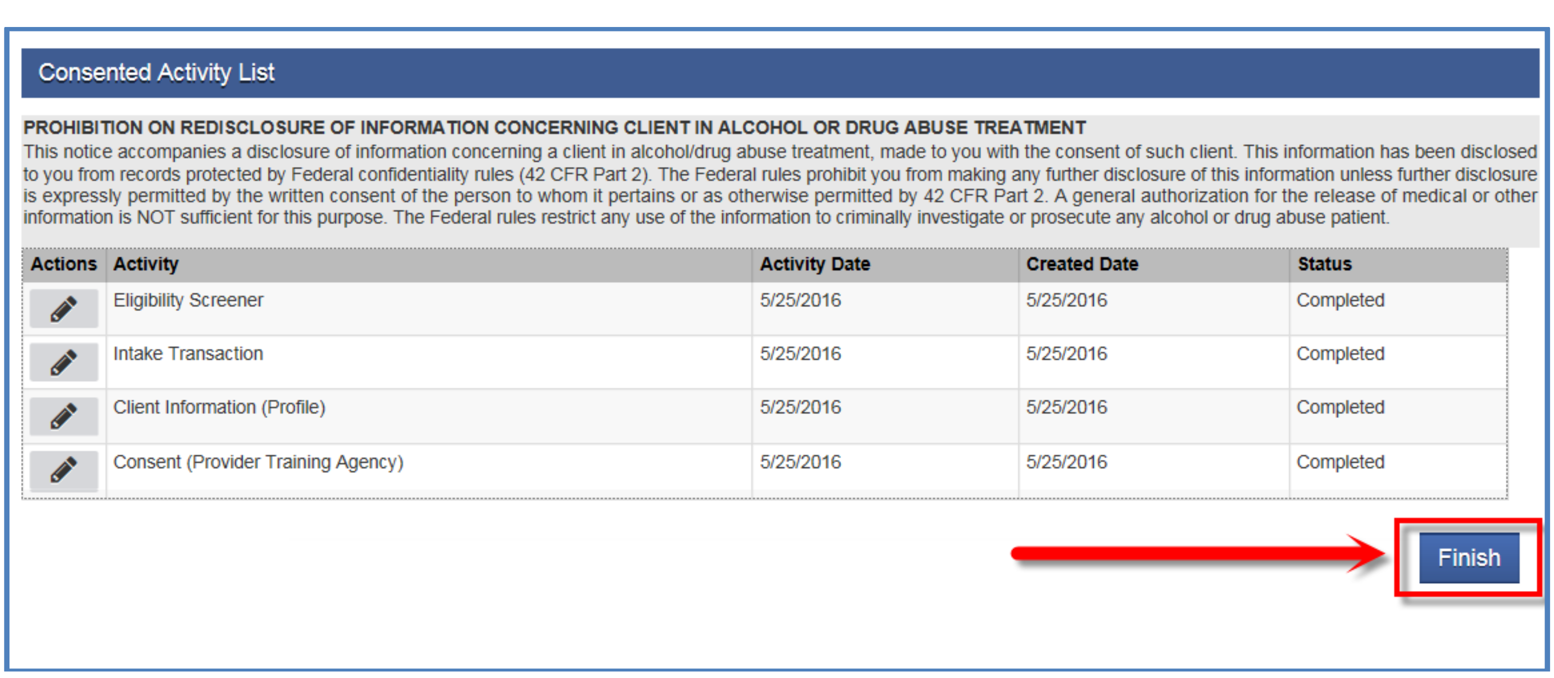
4. Hover over the and click Review under Actions to view the specific activity.



5. The activity displays as Read Only in a separate window. Close the window when finished.



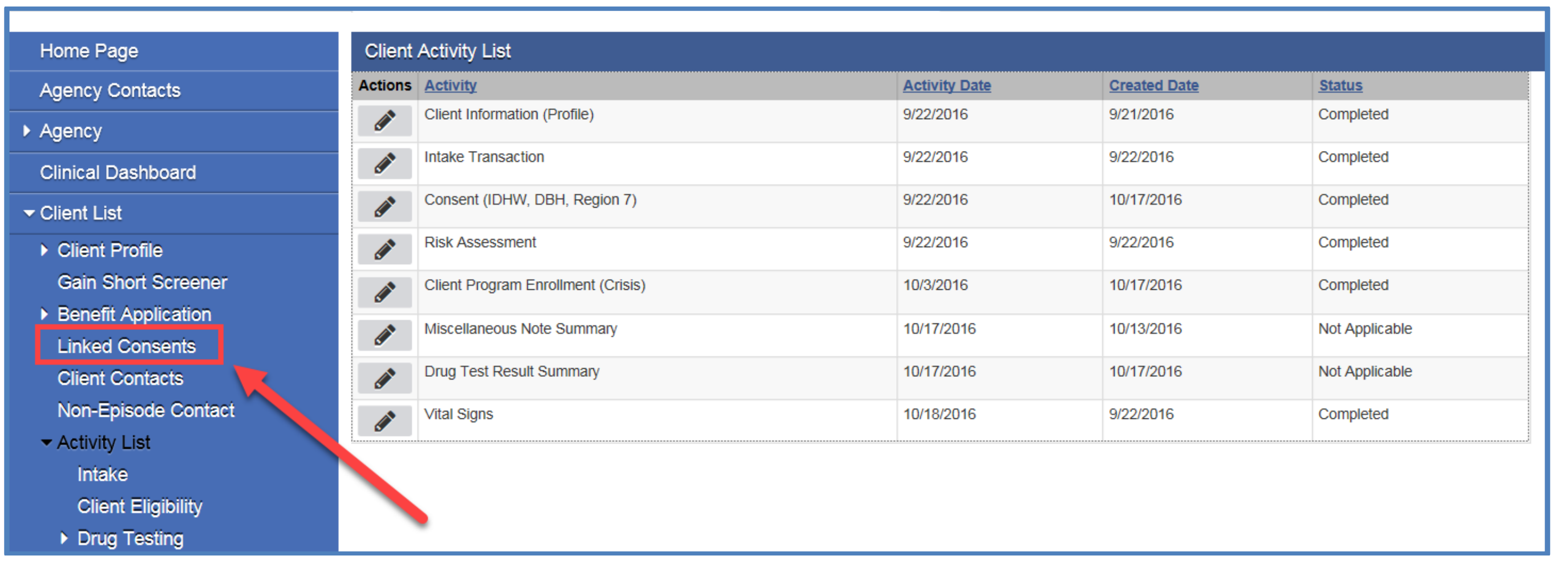
6. Click Return to Consented Activity List.



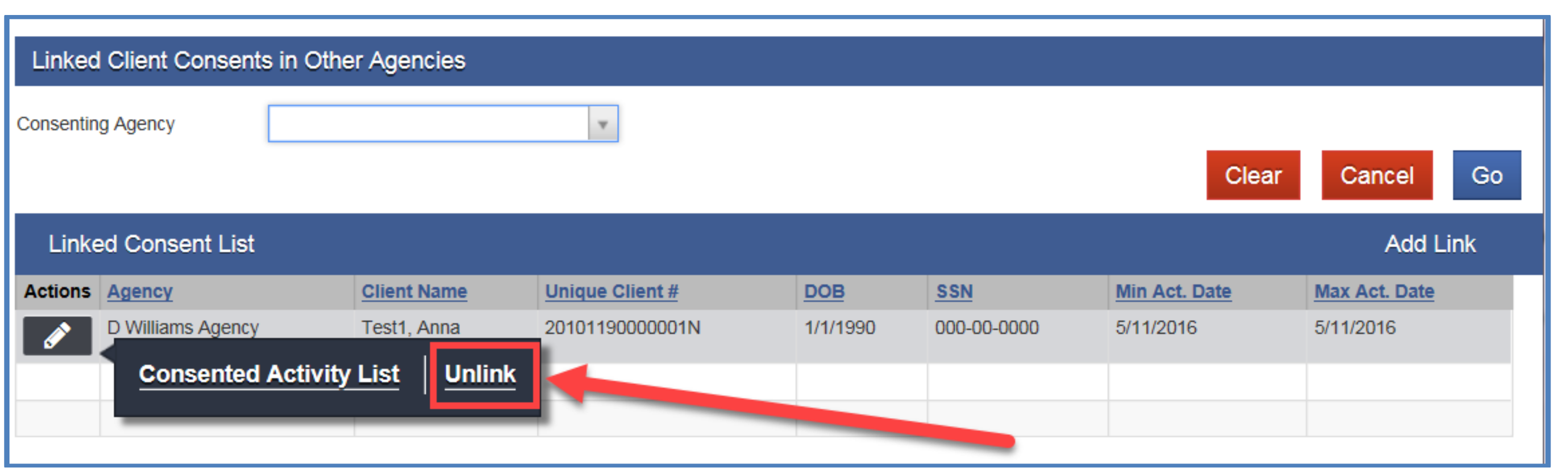
7. Click Finish.

Unlinking Consents

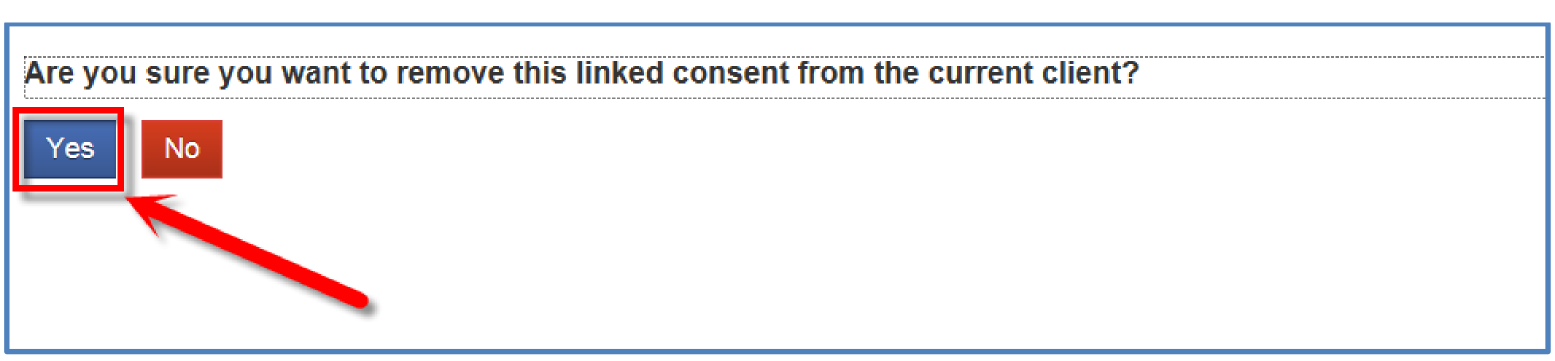
1. Begin on the Client Activity List.



2. Once you're on the Activity List, click Linked Consents on the blue navigation pane.



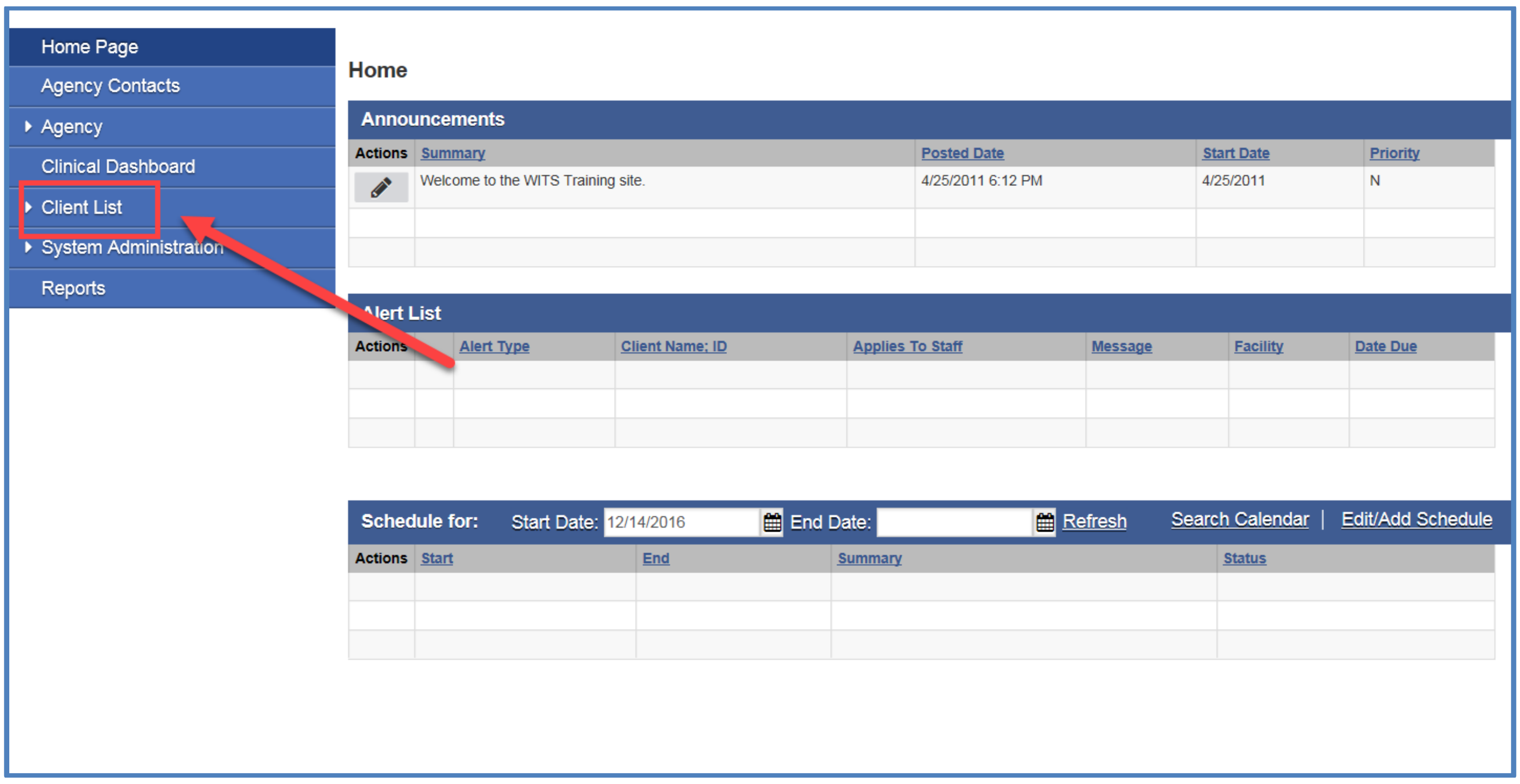
3. The Linked Consent List for the client displays. Hover over the pencil icon and click Unlink.



4. Click Yes to unlink the consent or click No to cancel.

Removing a Consent from Clients with Consents from Outside Agencies

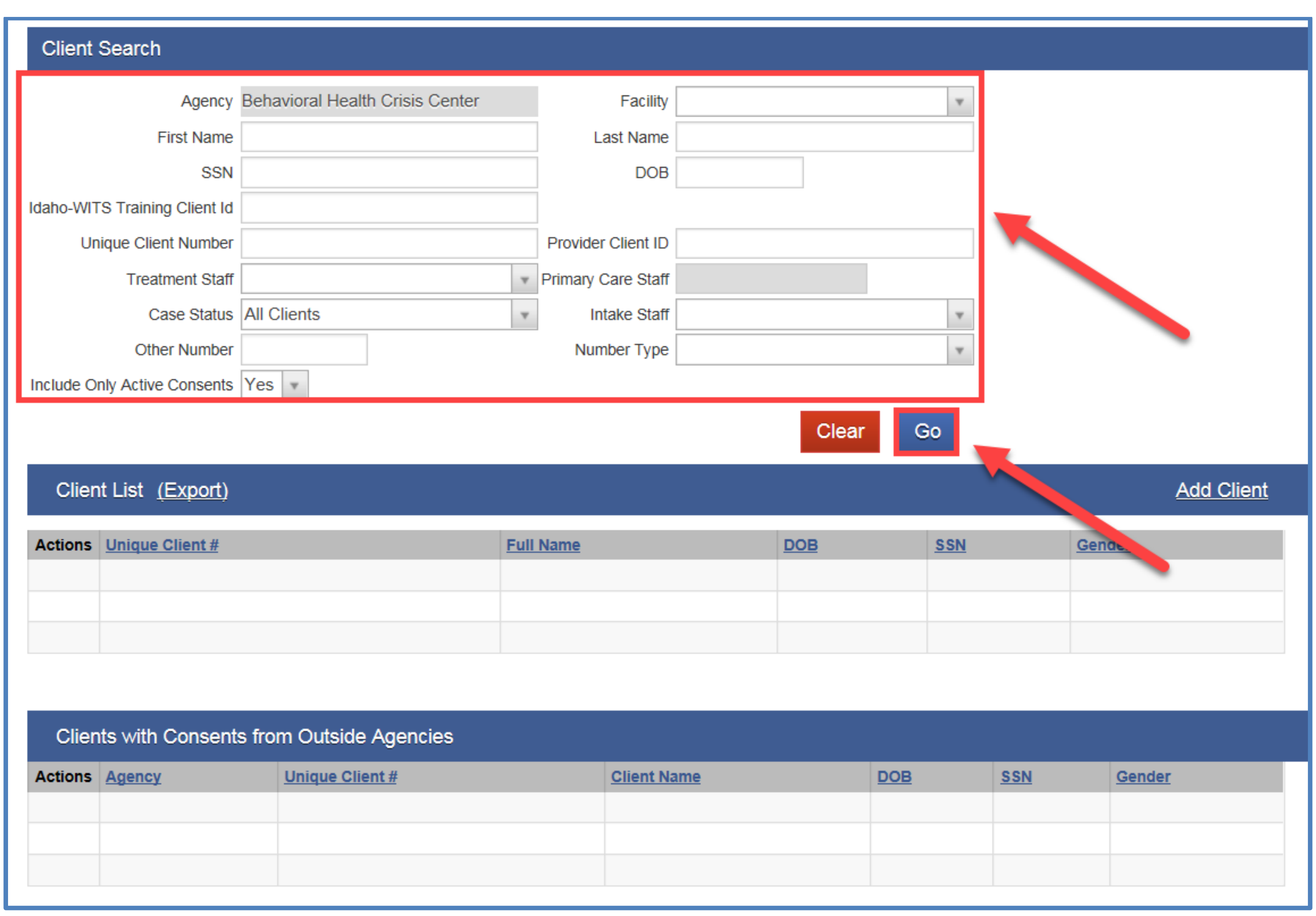
1. Begin on the Home Page.



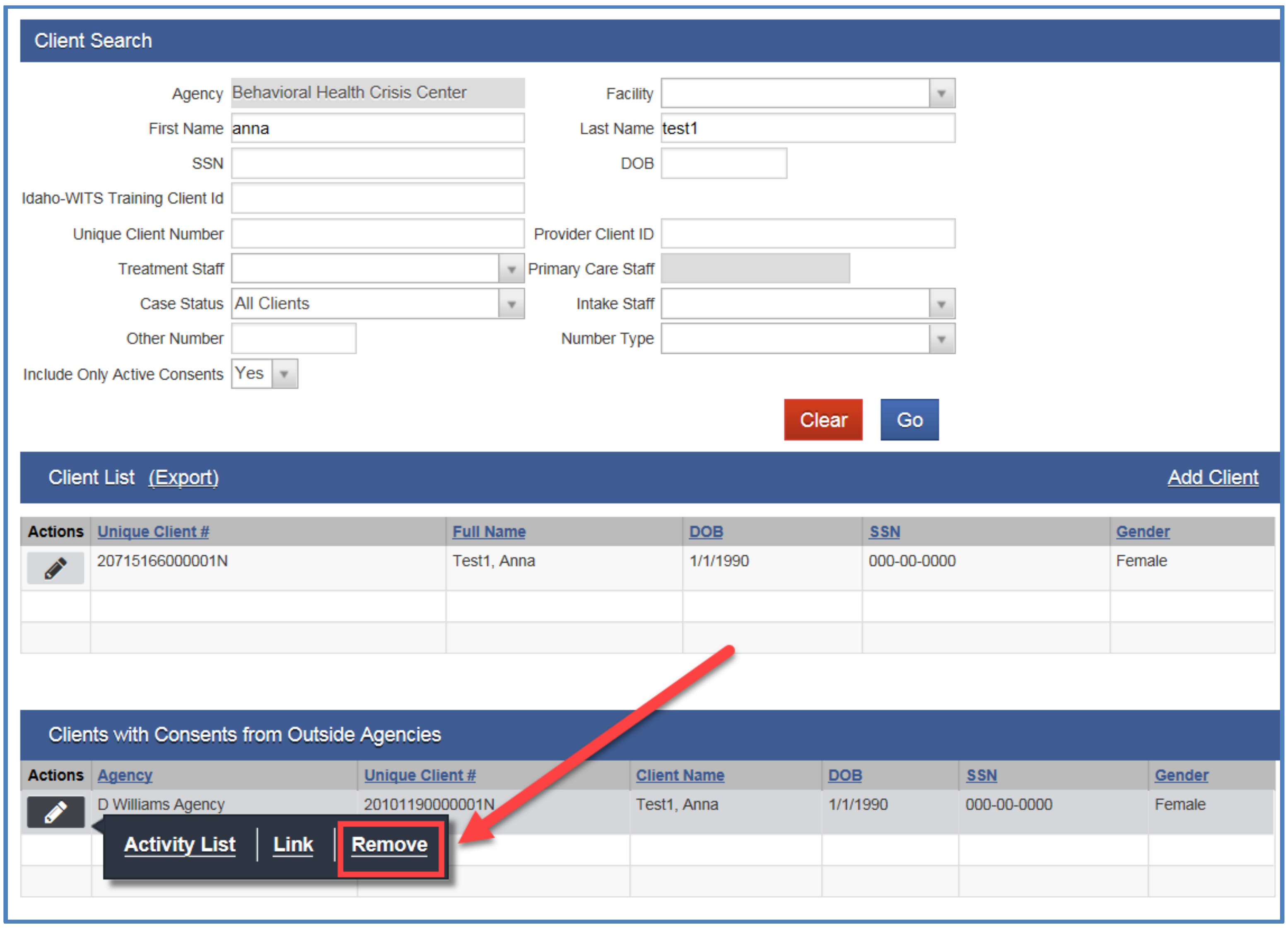
2. Click Client List on the blue navigation pane.

Perform a Wild Card Search to broaden your search. For example, if you want all individuals with a last name beginning with Ano, enter ano* in the last name field. You can also search using a date range in date fields dates for example, searching for 01/01/2000:12/31/2000 – returns any record with a date in the year 2000.

To view only Active Clients, select a Case Status of Clients with Open Cases.



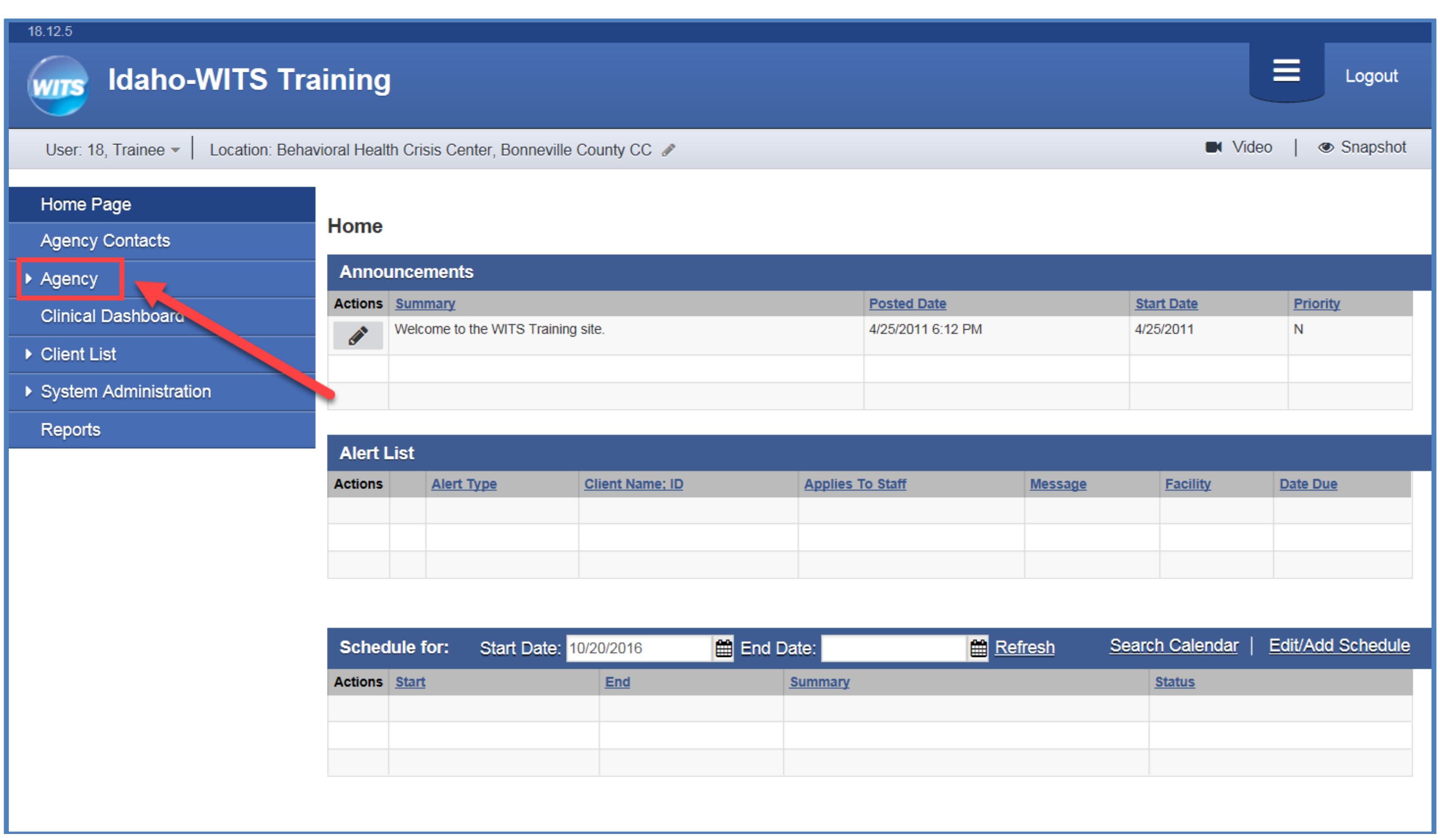
3. Enter your search criteria and click Go.



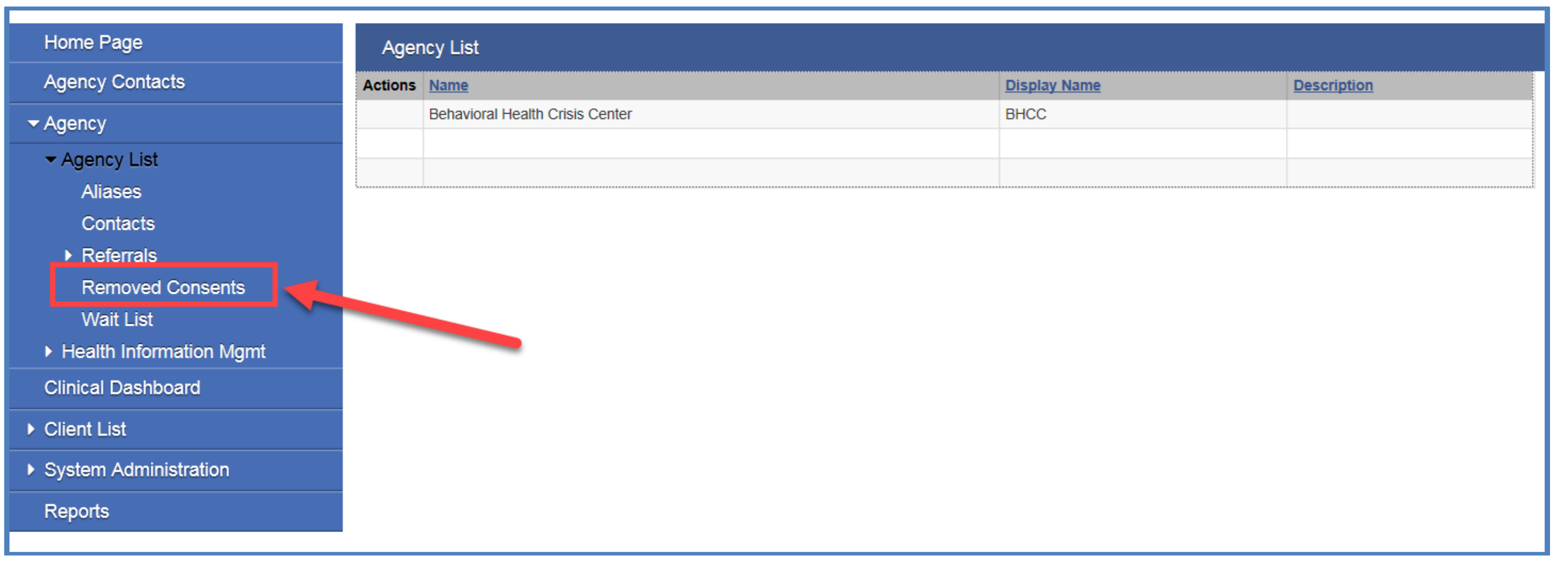
4. Hover over the and click Remove.

Restoring a Removed Consent

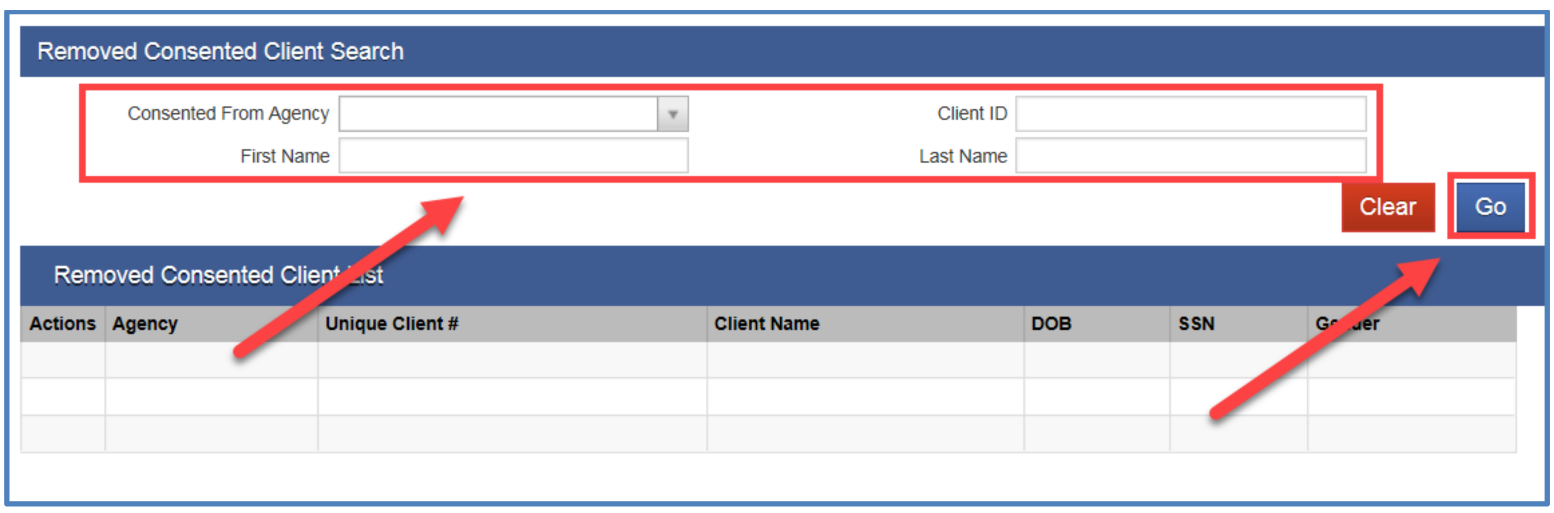
1. Begin on the Home Page.



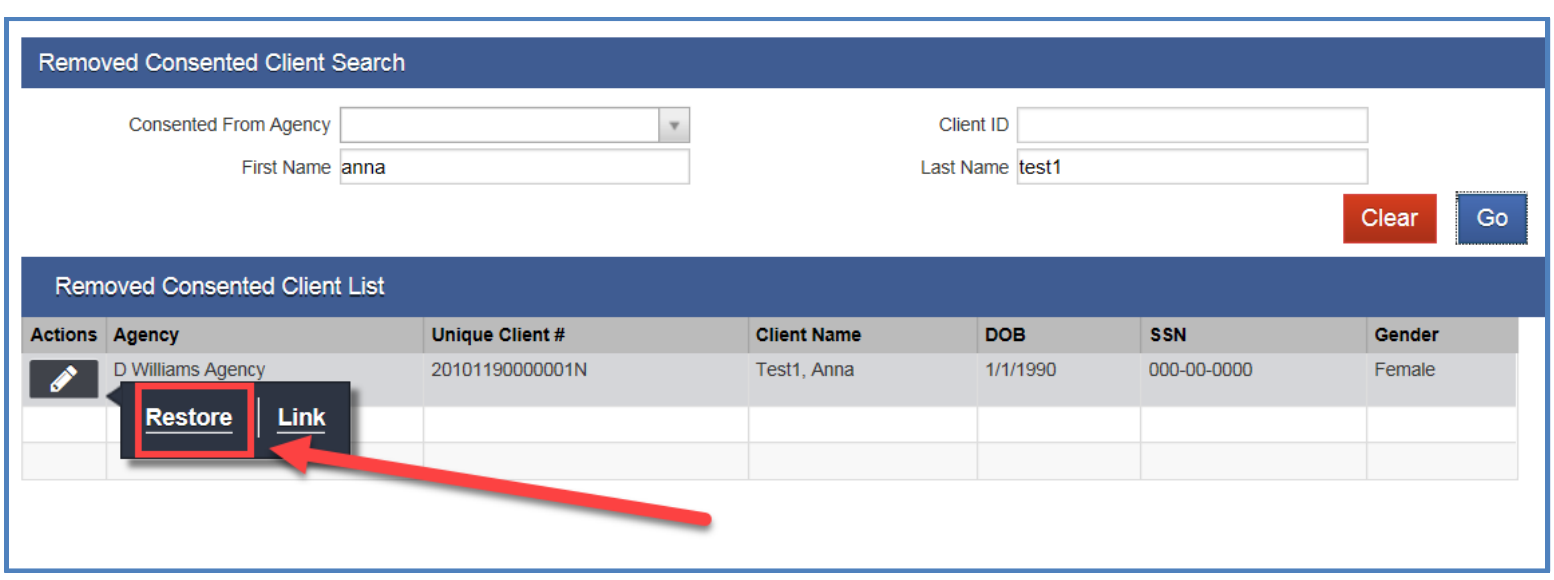
2. Click Agency on the blue navigation pane.



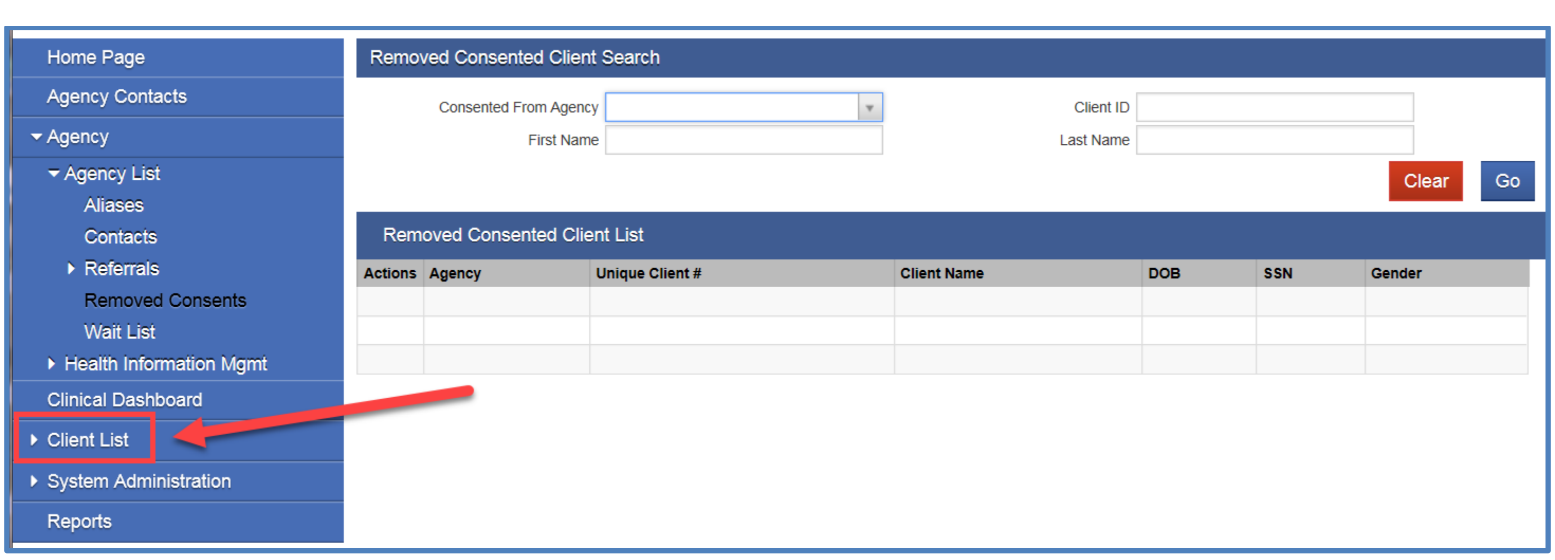
3. Click Removed Consents on the blue navigation pane.



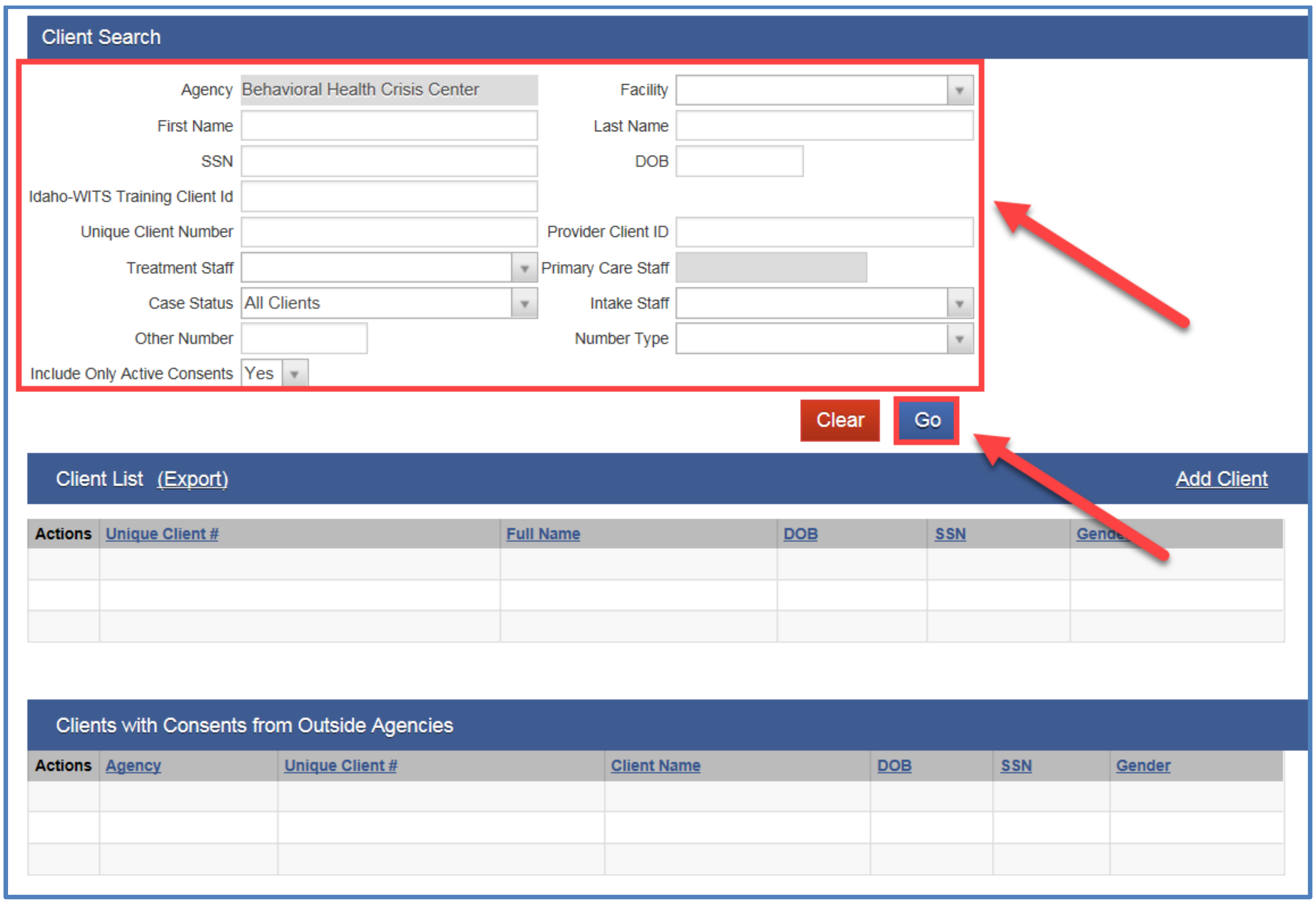
4. Enter your search criteria and click Go .



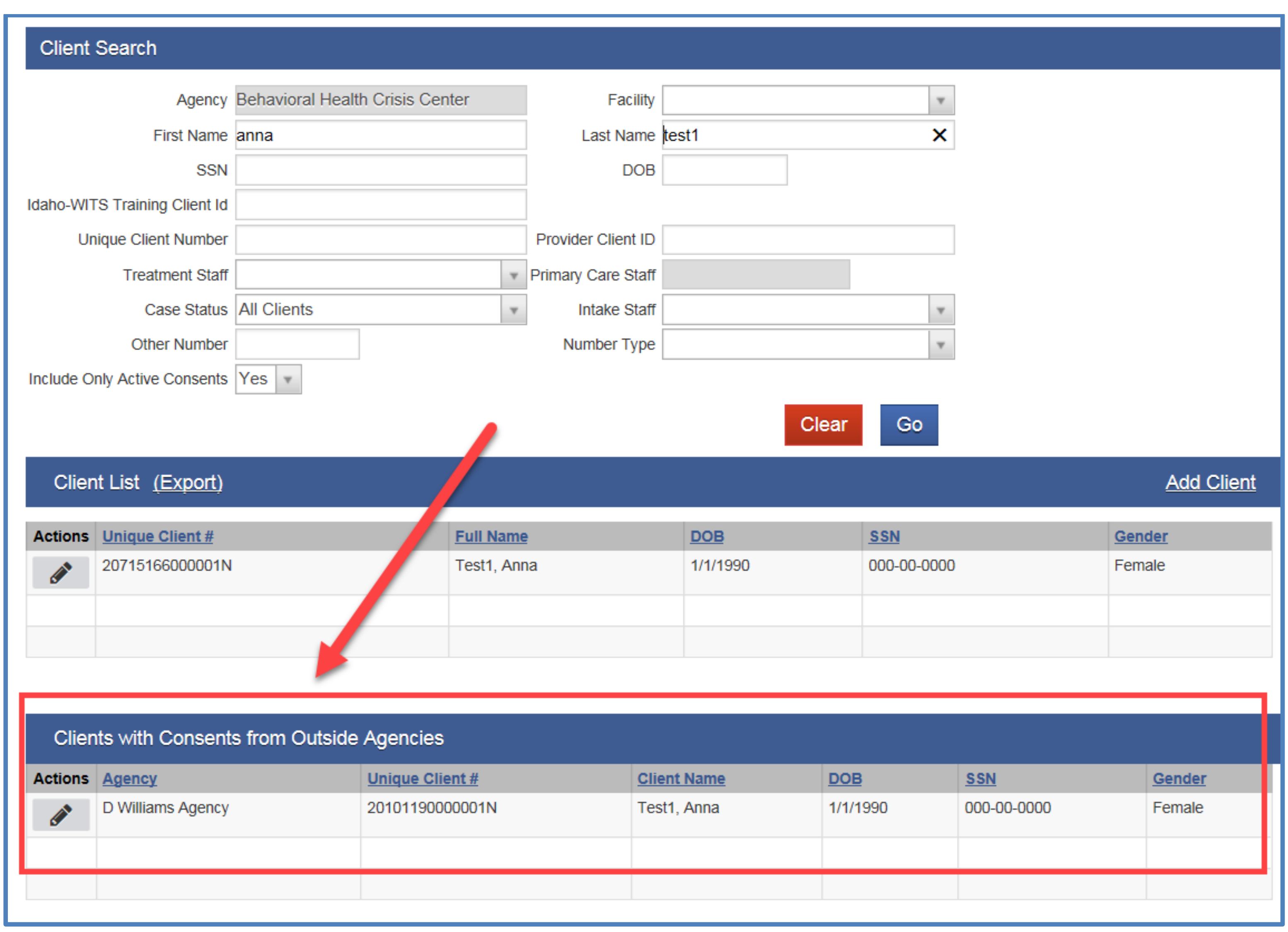
5. Hover over the ✎ and click Restore. This will make the consent show up again under Clients with Consents from Outside Agencies on the Client List.



6. Click Client List on the blue navigation pane.



7. Enter your search criteria and click Go .



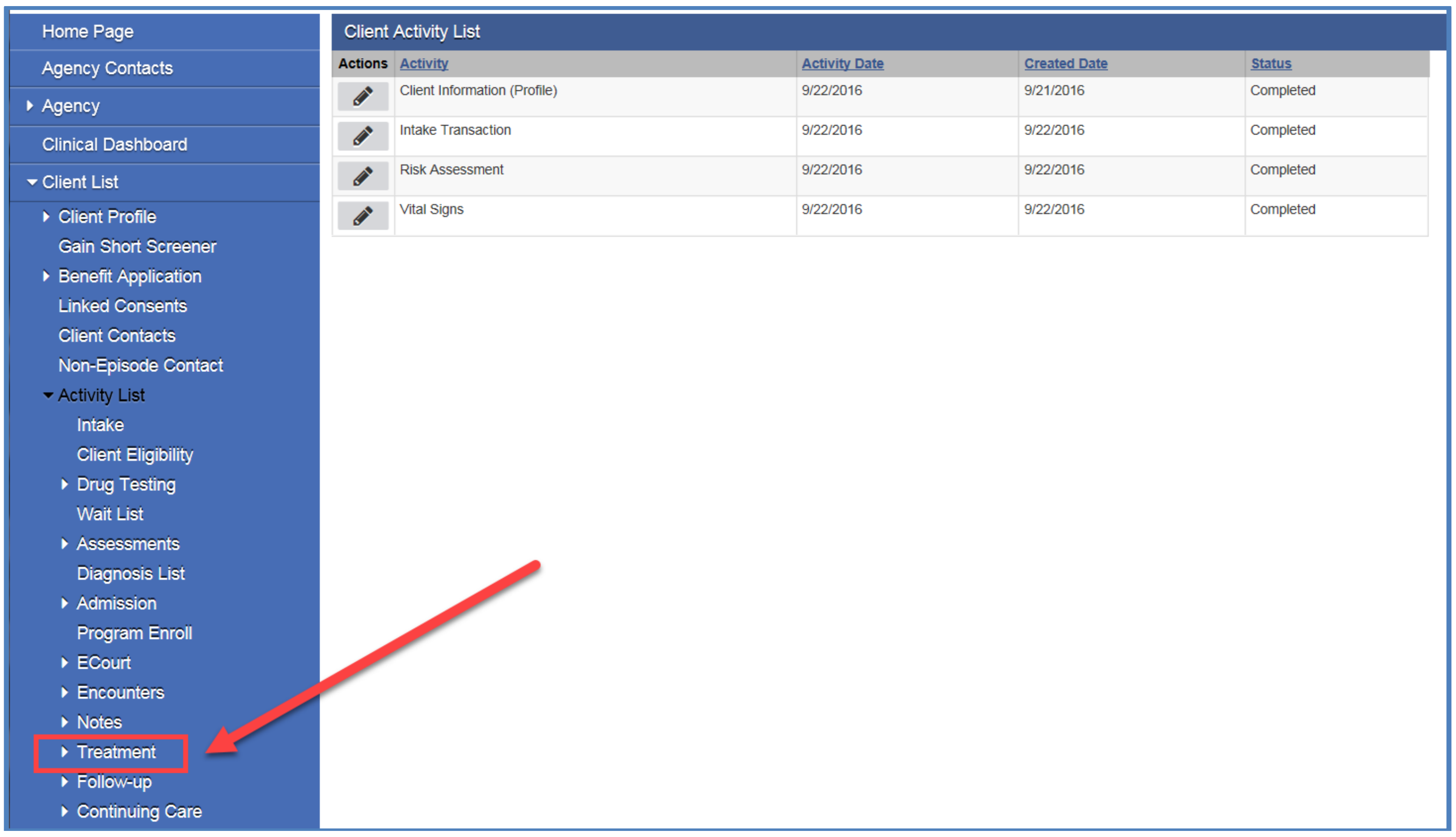
8. The Consent will be visible in the bottom section titled Clients with Consents from Outside Agencies.

Medications

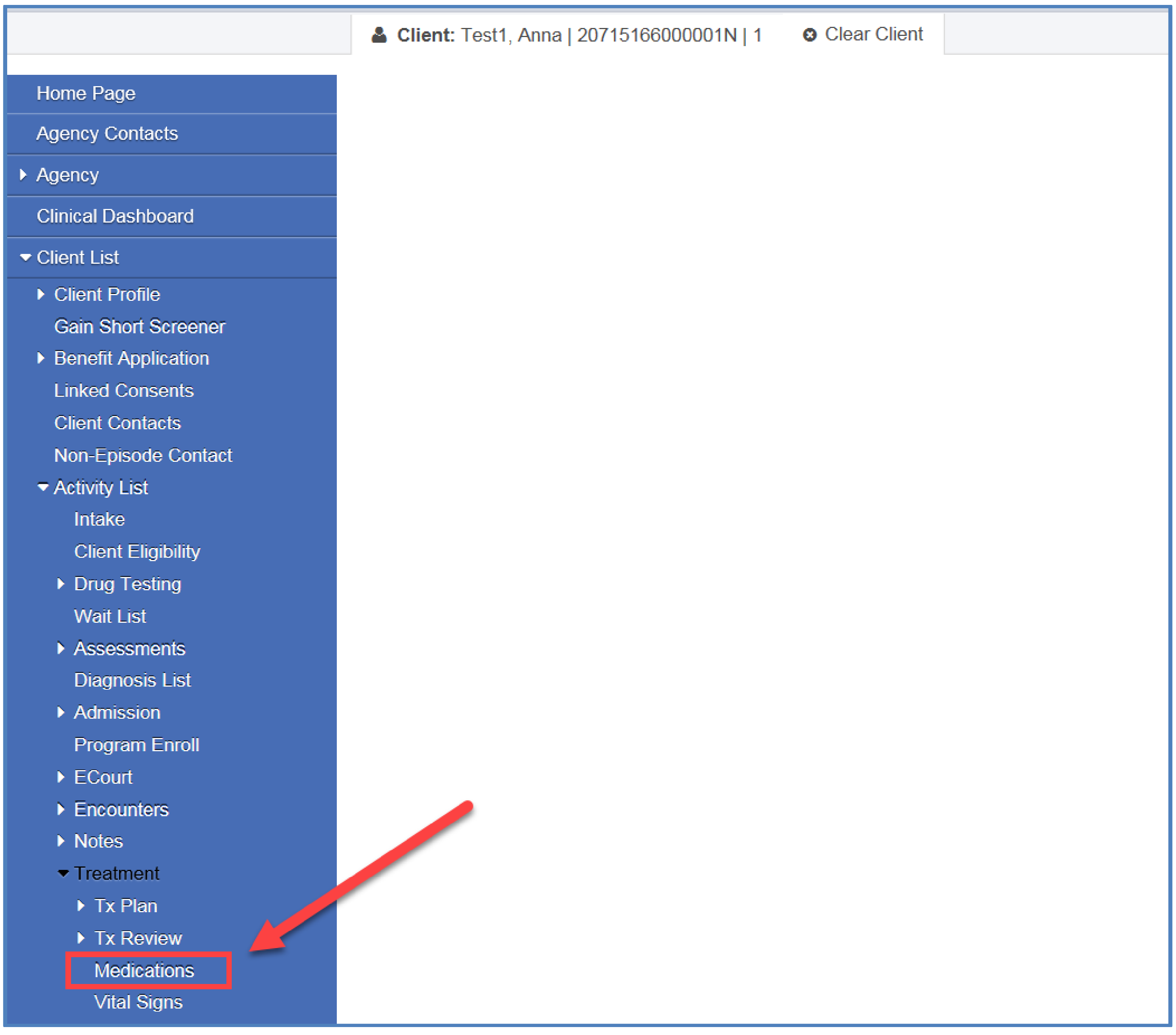
Purpose: The medication page is used to document medications prescribed to the client.

Adding a Medication to the Medication List

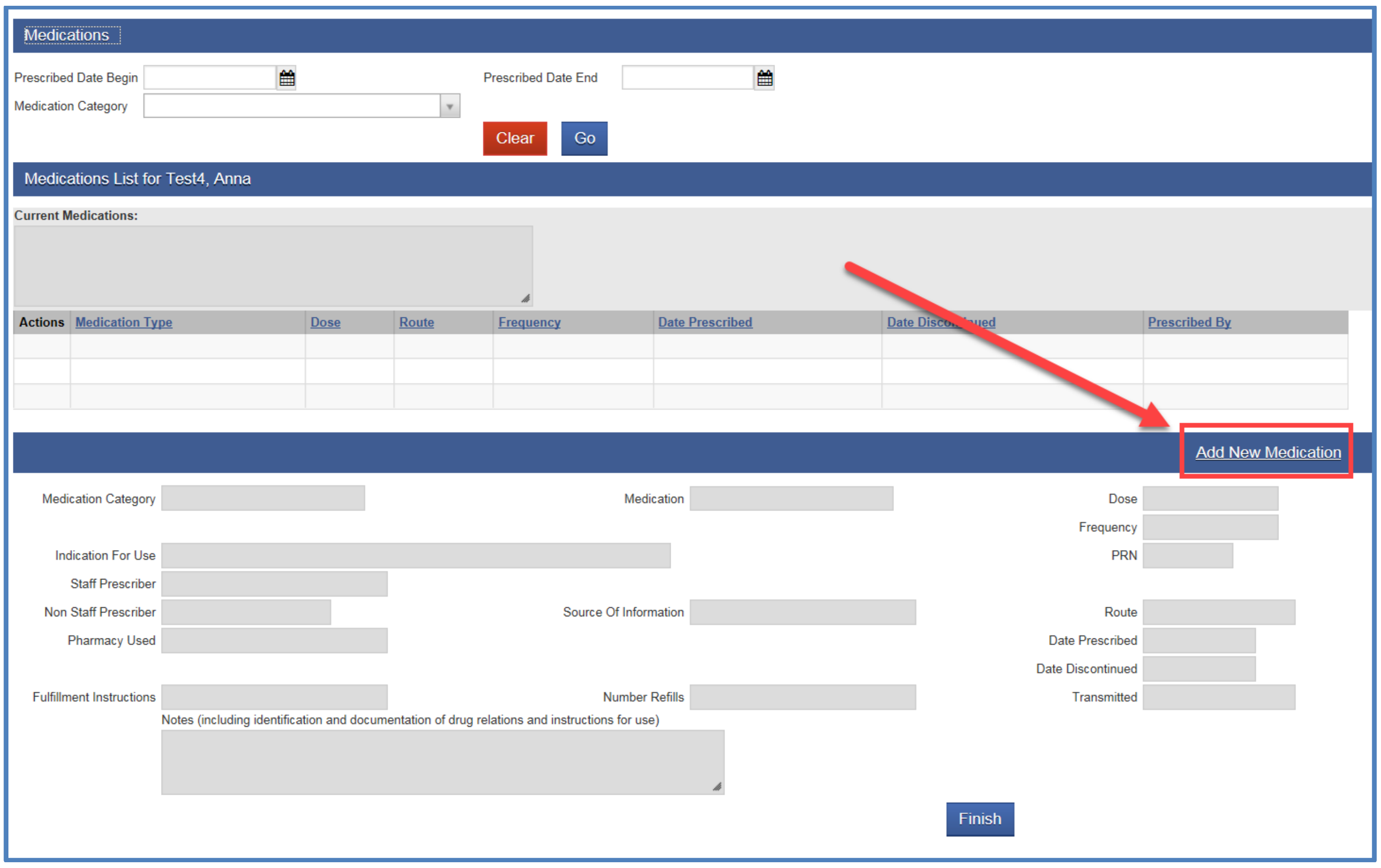
1. Begin on the Client Activity List.



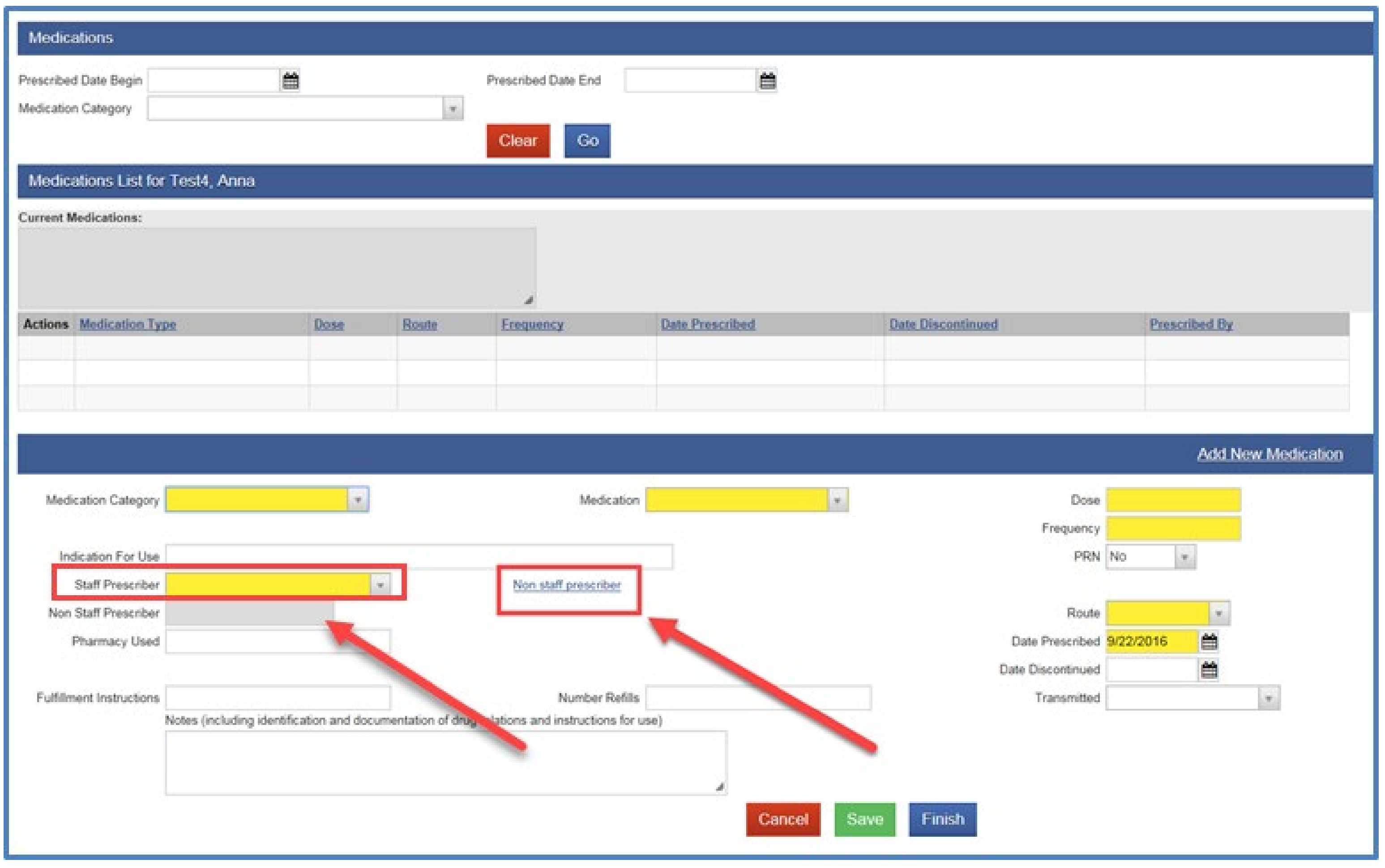
2. Once you're on the Activity List, click Treatment on the blue navigation pane.



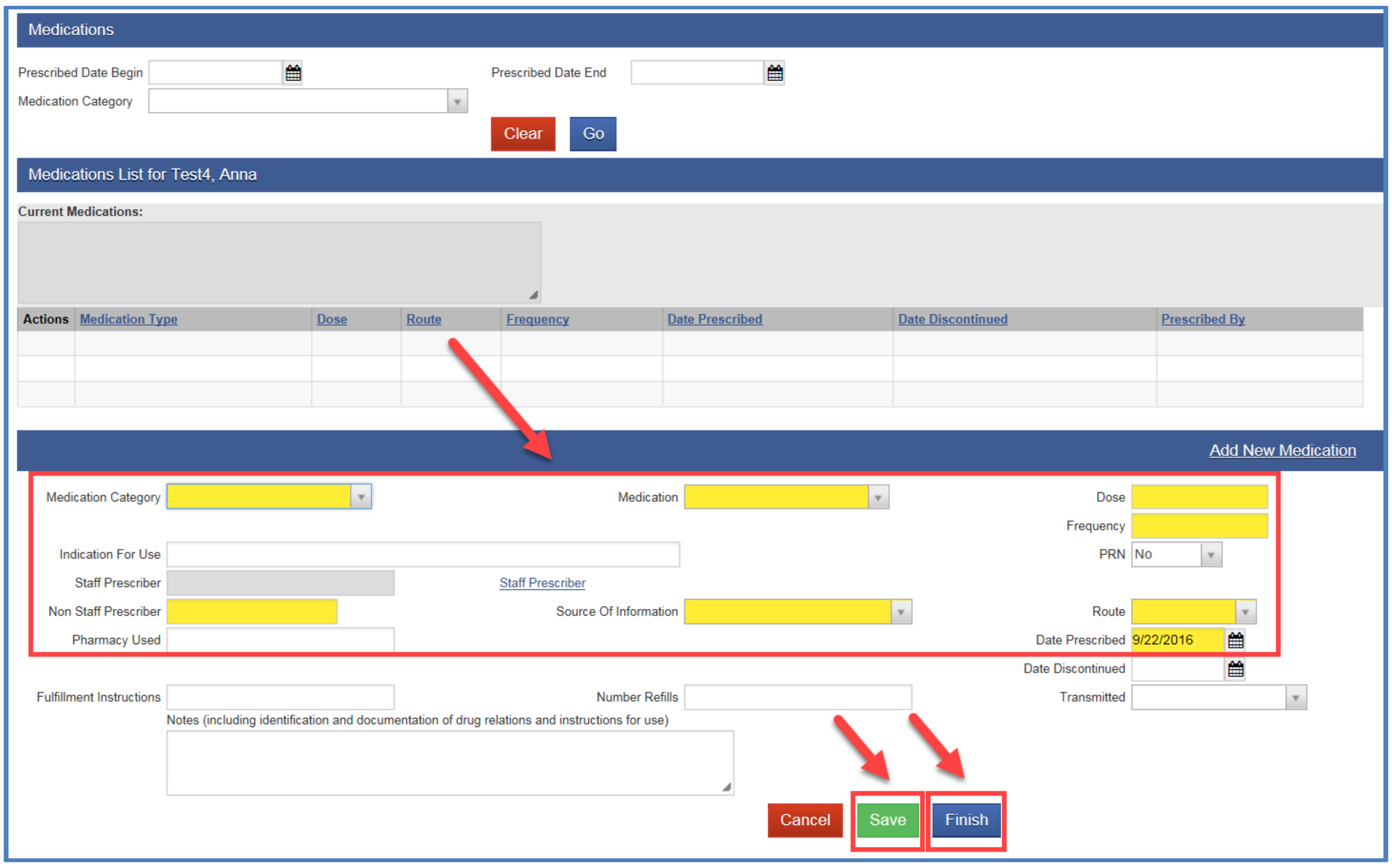
3. Click Medications on the blue navigation pane.



4. Click Add New Medication.



5. If the medication was prescribed by a staff member, select his or her name in the Staff Prescriber field. Otherwise, click Non staff prescriber .



6. Complete the following fields.
   - Medication Category – select the medication category.
   - Medication – the field will populate based on the medication category selected. Select the medication name.
   - Dose – enter the dosage.
   - Frequency – enter the frequency.
   - Non Staff Prescriber – enter the name of the prescriber.
   - Source of Information – select the source of the information of the prescription.
   - Route – select the route.
   - Date Prescribed – the field will populate with today's date. Update as needed.
7. Click Save and Finish.

Miscellaneous Notes

There are two categories of Notes: Encounter Notes and Miscellaneous Notes. Encounter Notes will not be utilized by a BHCCC.

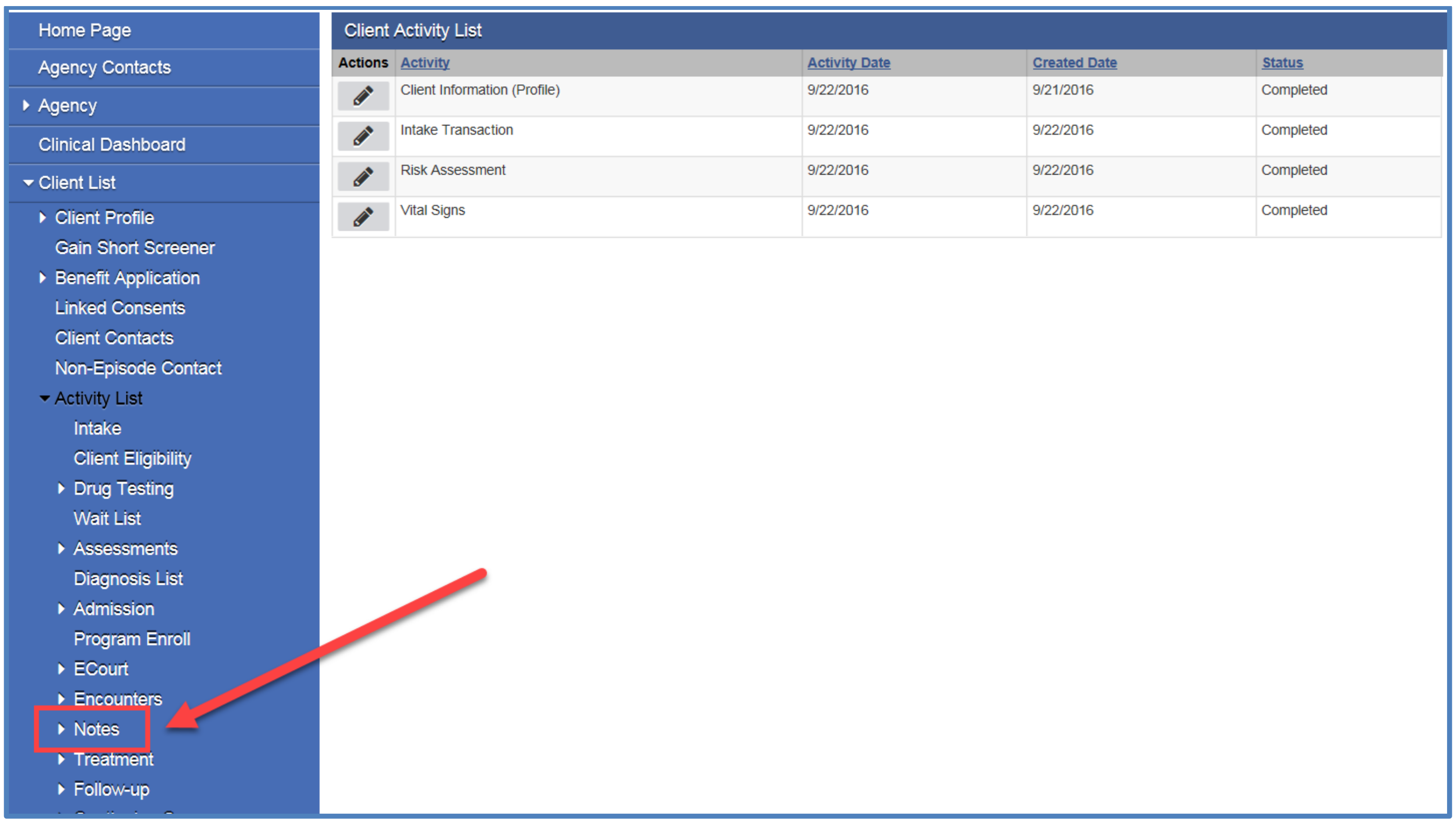
Purpose: Miscellaneous Notes are used to document information about a client while they are at the BHCCC.

Creating a Miscellaneous Note

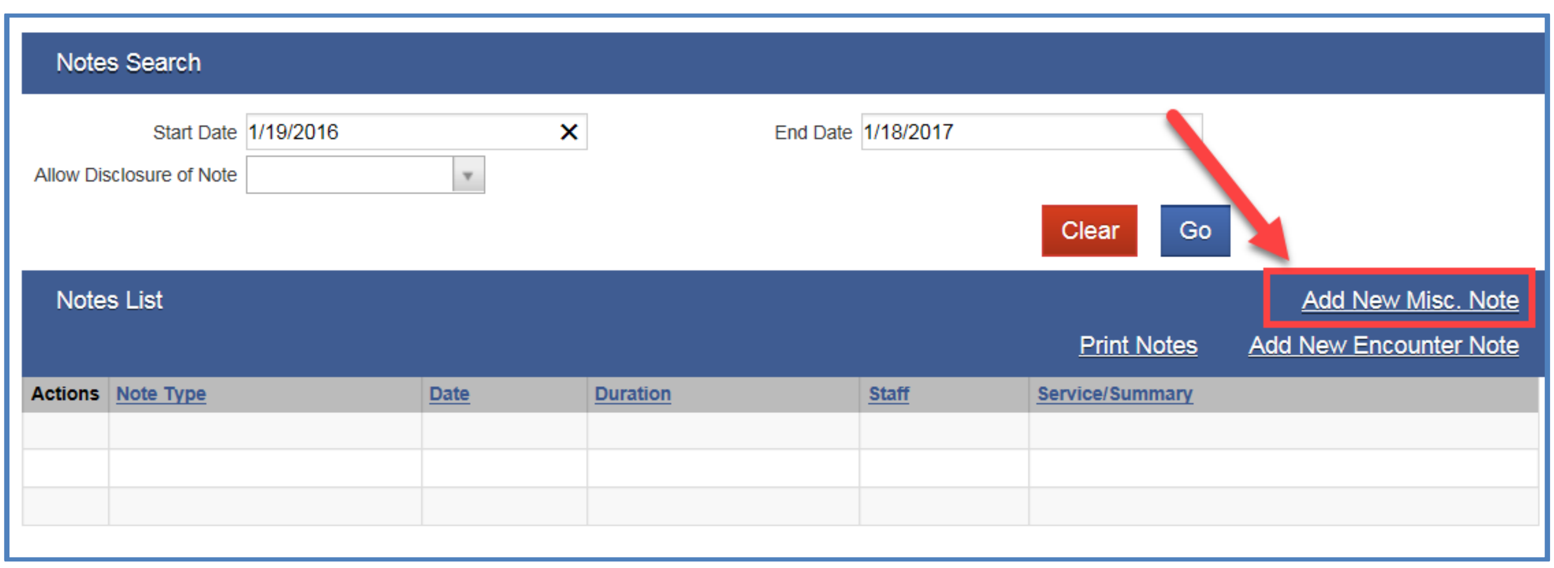
The Intake must be completed before a Miscellaneous Note can be created.

BHCCCs will not be using the alert function on Miscellaneous Notes.

1. Begin on the Client Activity List.

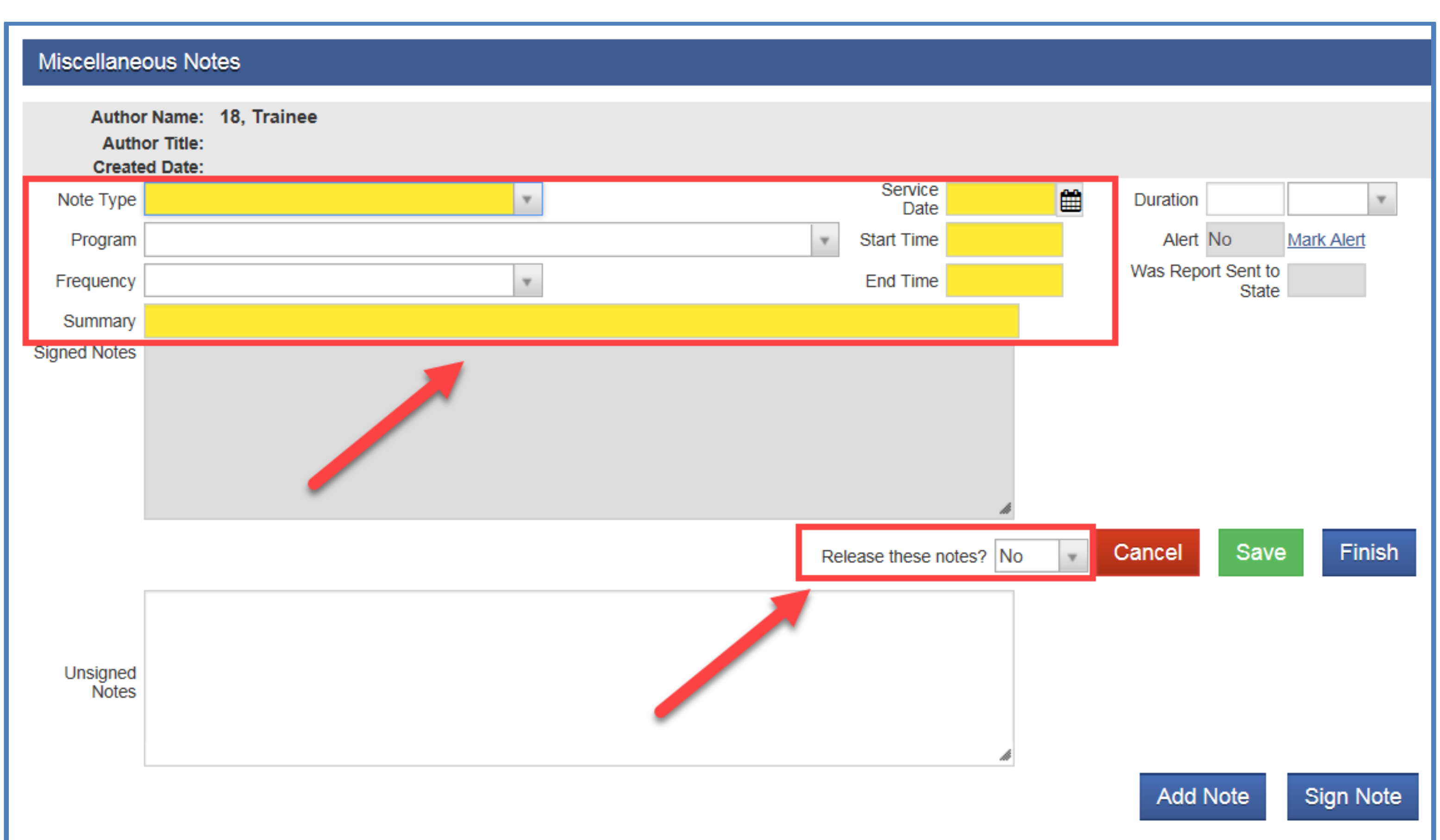


2. Once you're on the Activity List, click Notes on the blue navigation pane.



3. Click Add New Misc. Note.

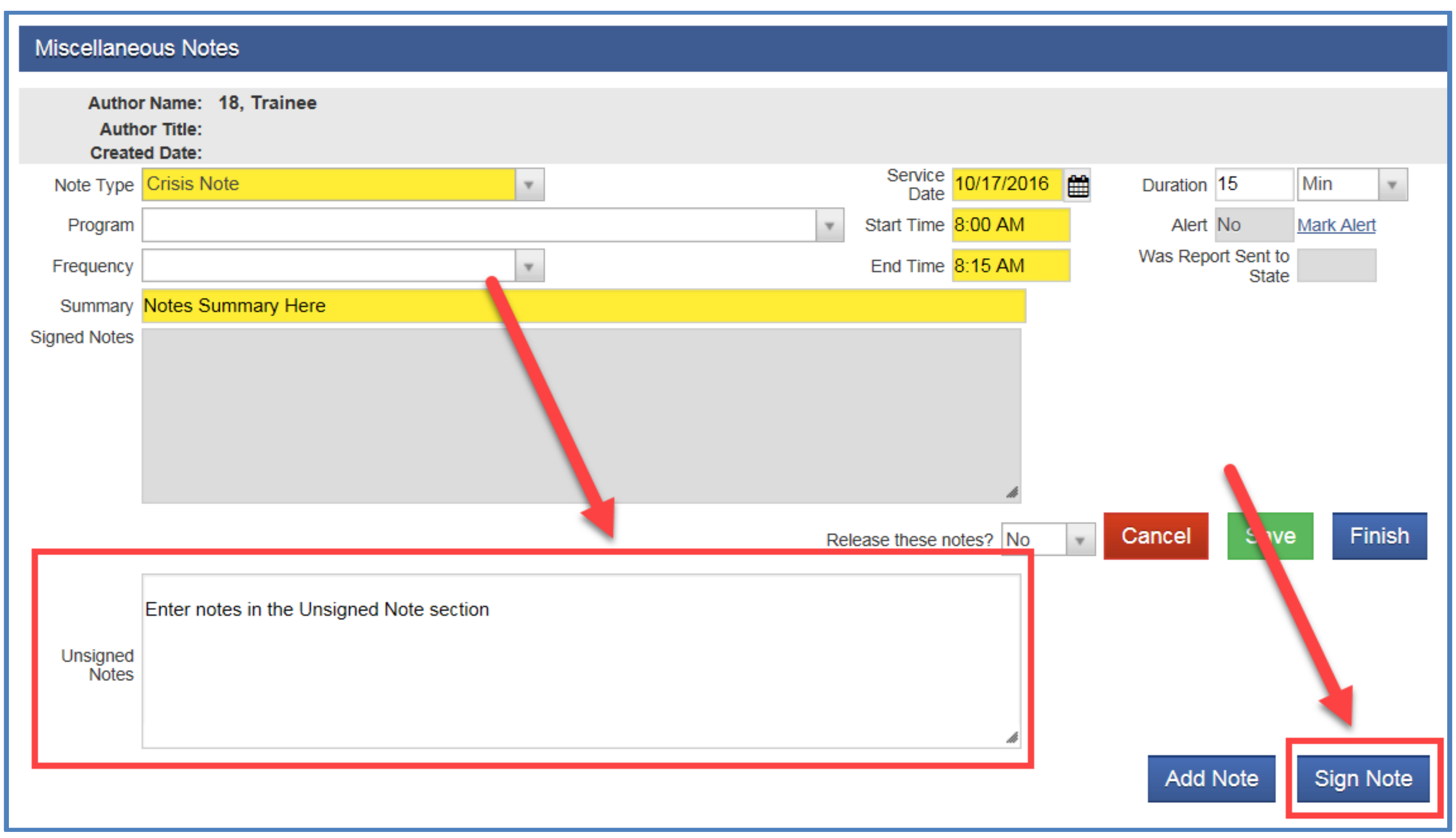
When Release these Notes is set to No, the note will not be available to view by another agency if the record is consented. For example, if the client has Consent with another agency, and No is selected, the other agency will not be able to view the note.



4. Complete the following fields.
   - Note Type – select the note type.
   - Service Date – enter the date.
   - Start Time – enter the start time as HH:MM.
   - End Time – enter the end time as HH:MM.
   - Summary – enter a Summary.
   - Release these notes? – the field will populate with No. Update as needed.

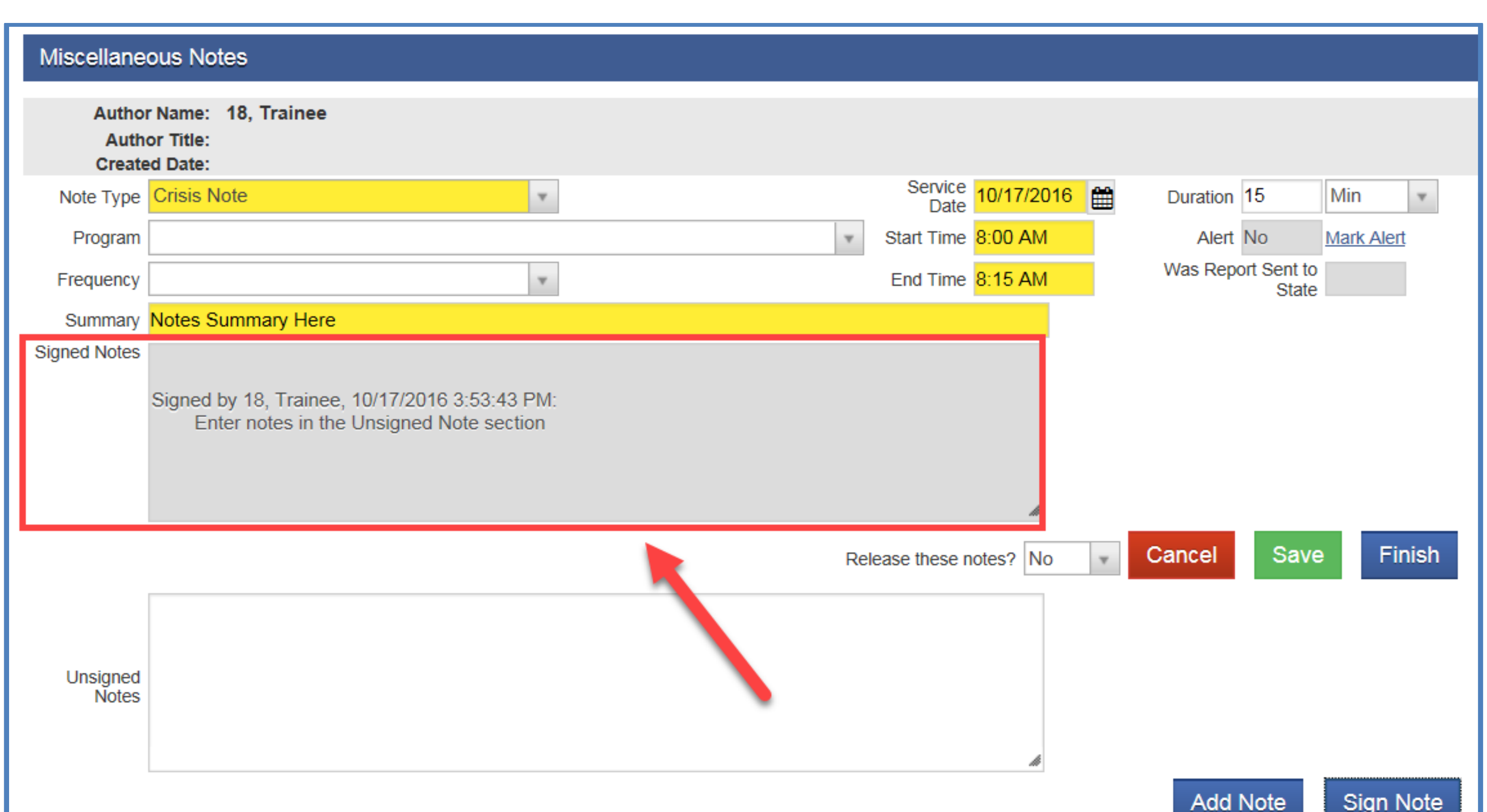
TIPS Spell check your Unsigned Notes before clicking Sign Note. A signed note becomes read-only and cannot be edited. To make a change, type an amendment in the unsigned notes box and click Sign Note.

TIPS Click Add Note to display additional note space in addition to the expandable Unsigned Note section.

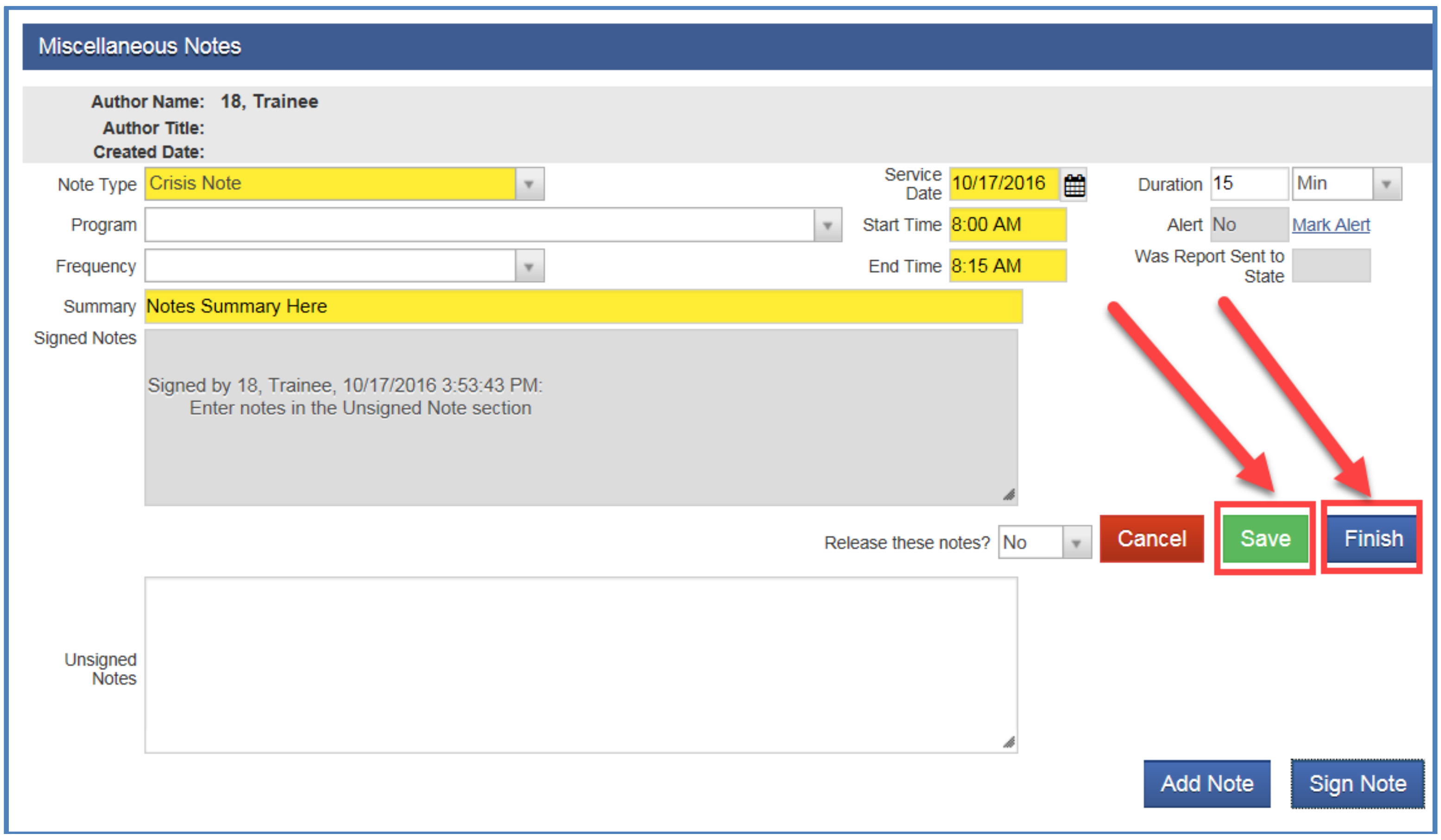


5. Enter notes in the Unsigned Note section.

6. When the notes are complete, click Sign Note.



7. The Signed Note becomes read-only and an electronic signature and time stamp is created in the Signed Notes section.



8. Click Save and click Finish.

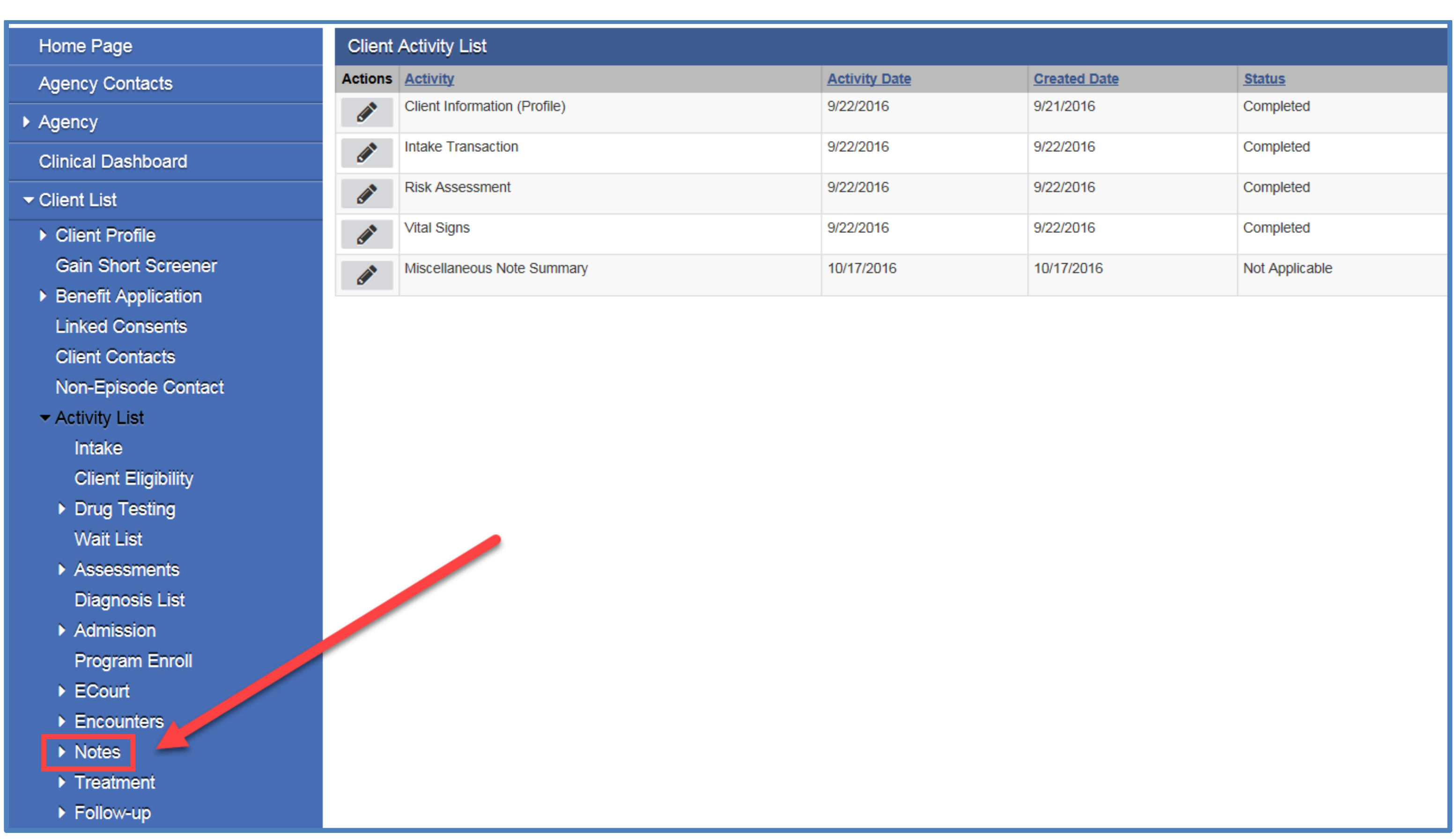
Deleting a Miscellaneous Note

Miscellaneous Notes in WITS are considered a part of the client's official electronic health record (EHR). It is your agencies responsibility to ensure you are adhering to the documentation standards set forth by IDAPA.

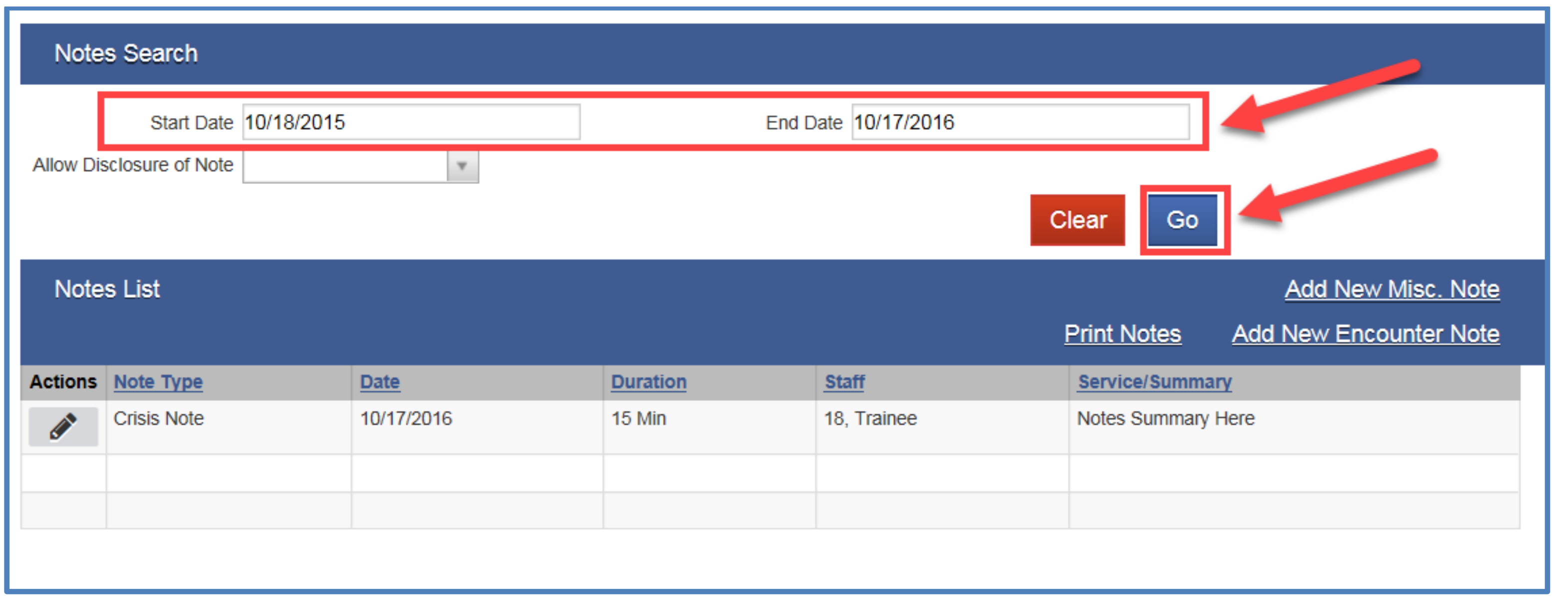
Contact your Agency WITS Administrator for assistance requesting the deletion of a Miscellaneous Note.

Printing a Miscellaneous Note

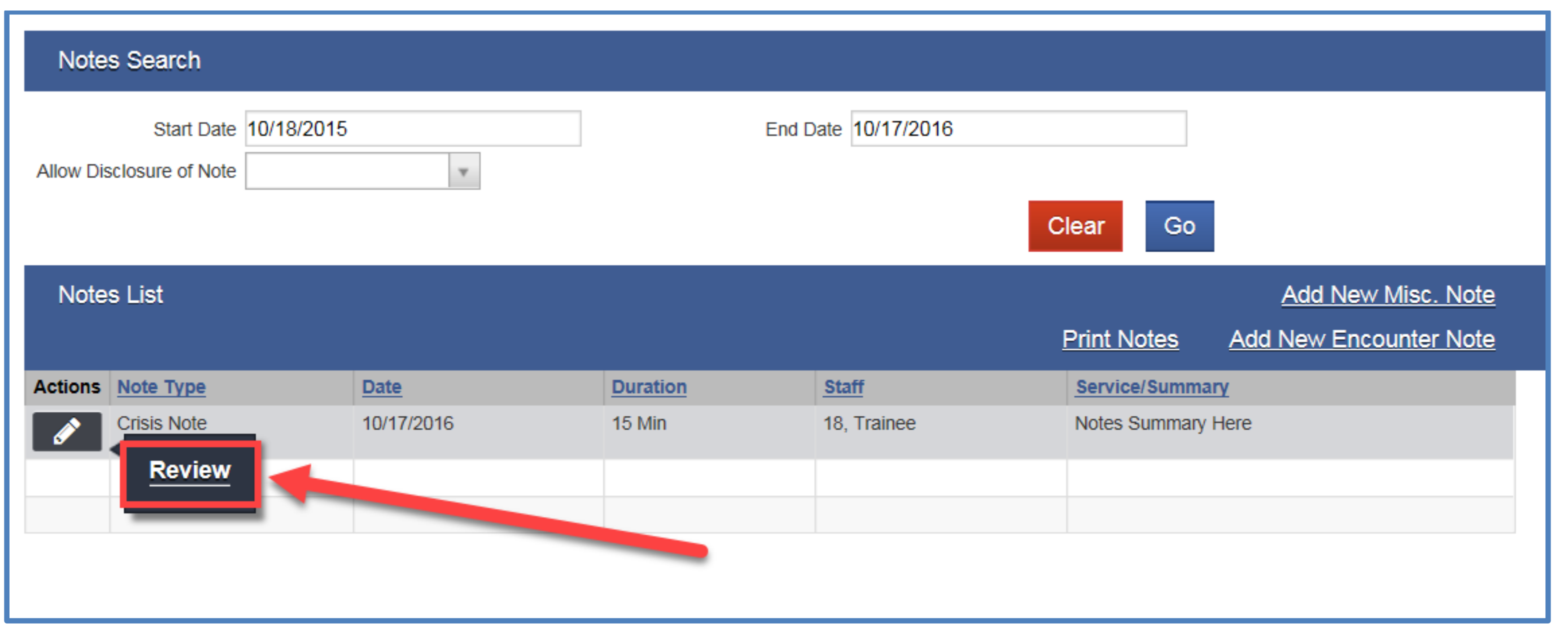
1. Begin on the Client Activity List.



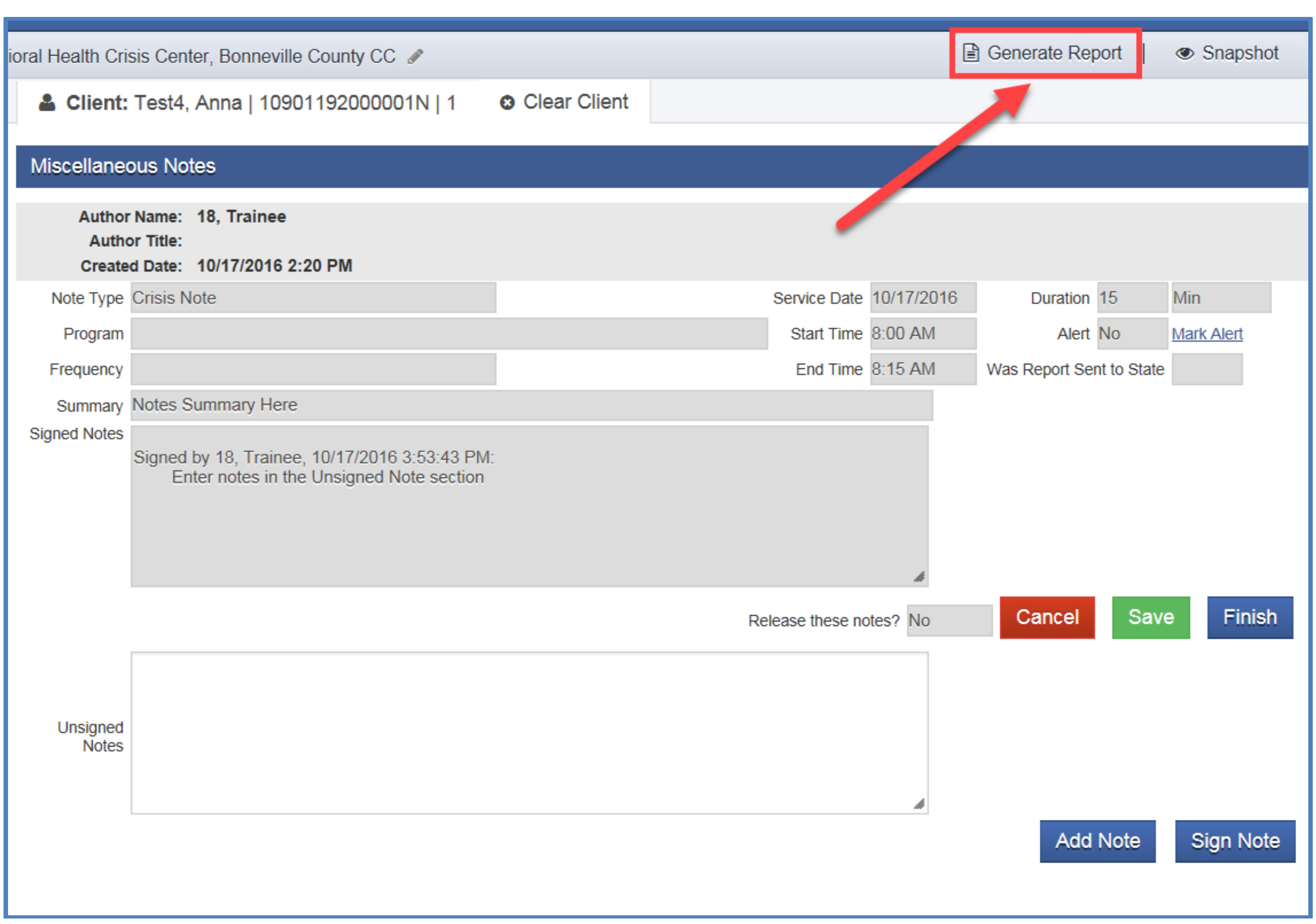
2. Once you're on the Activity List, click Notes on the blue navigation pane



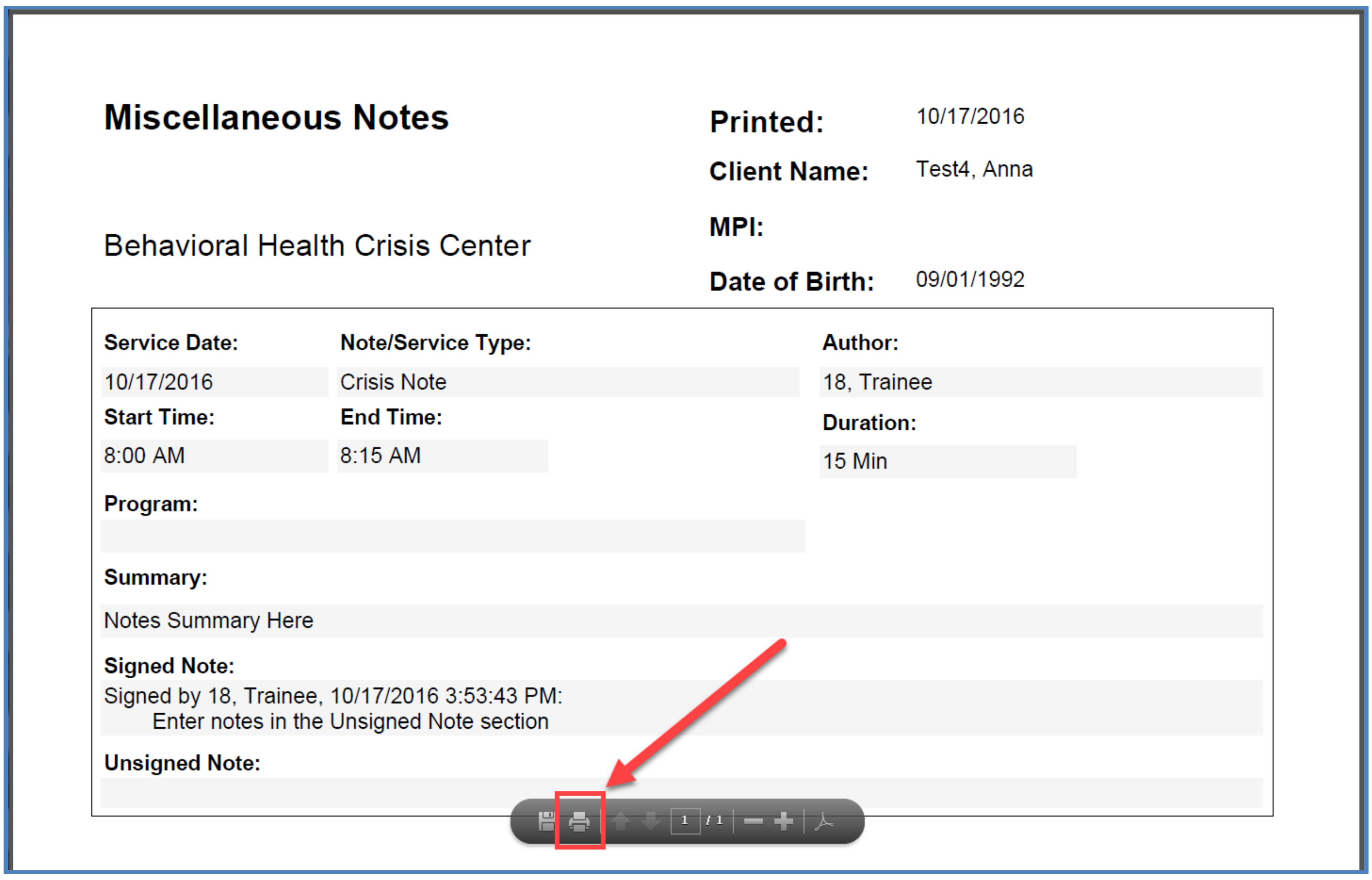
3. The Notes Search page displays. The Start Date defaults to one year ago from today's date and the End Date defaults to today's date. If necessary, update the search criteria and click Go.



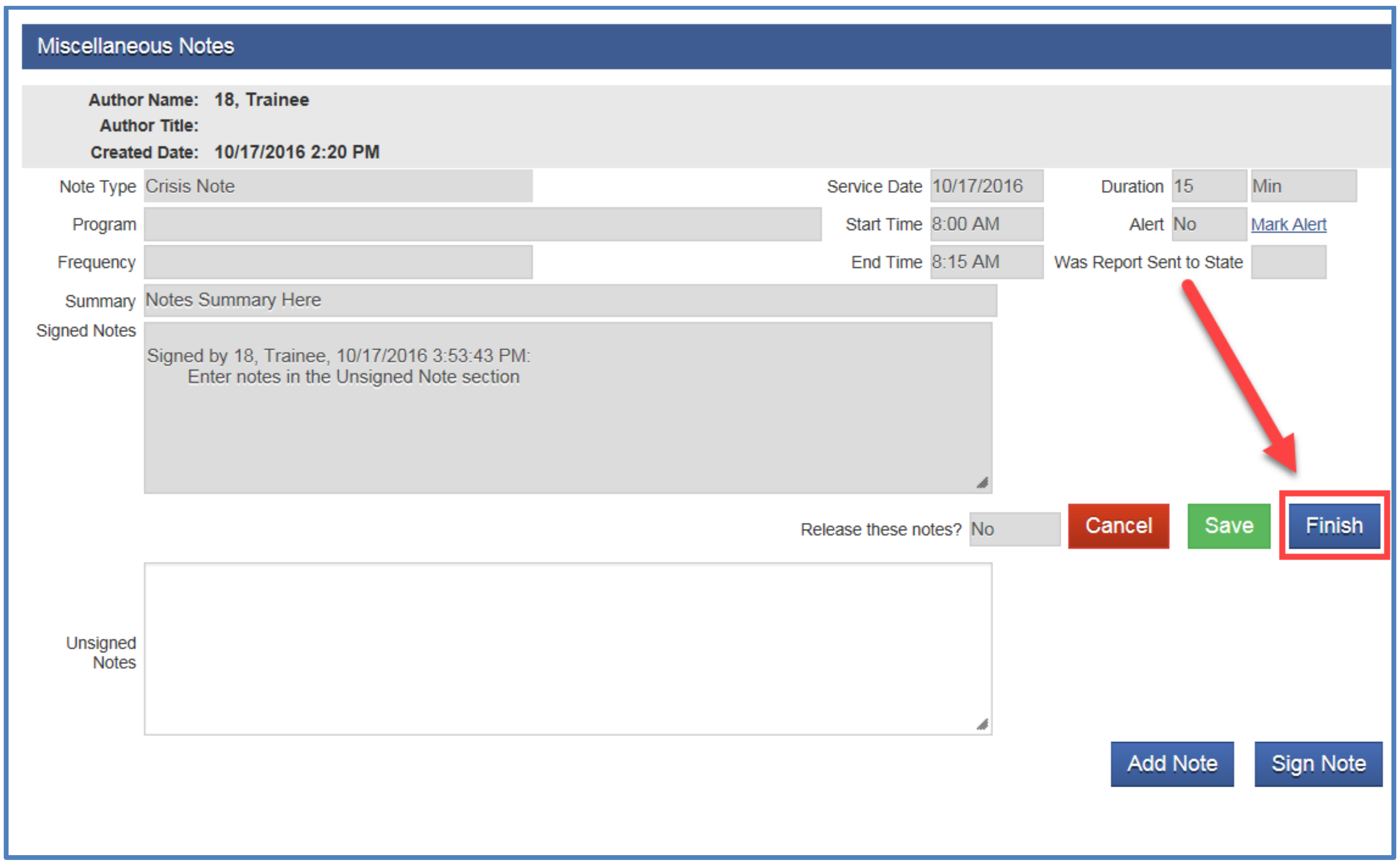
4. Hover over the and click Review under Actions for the Miscellaneous Note.



5. Click Generate Report.



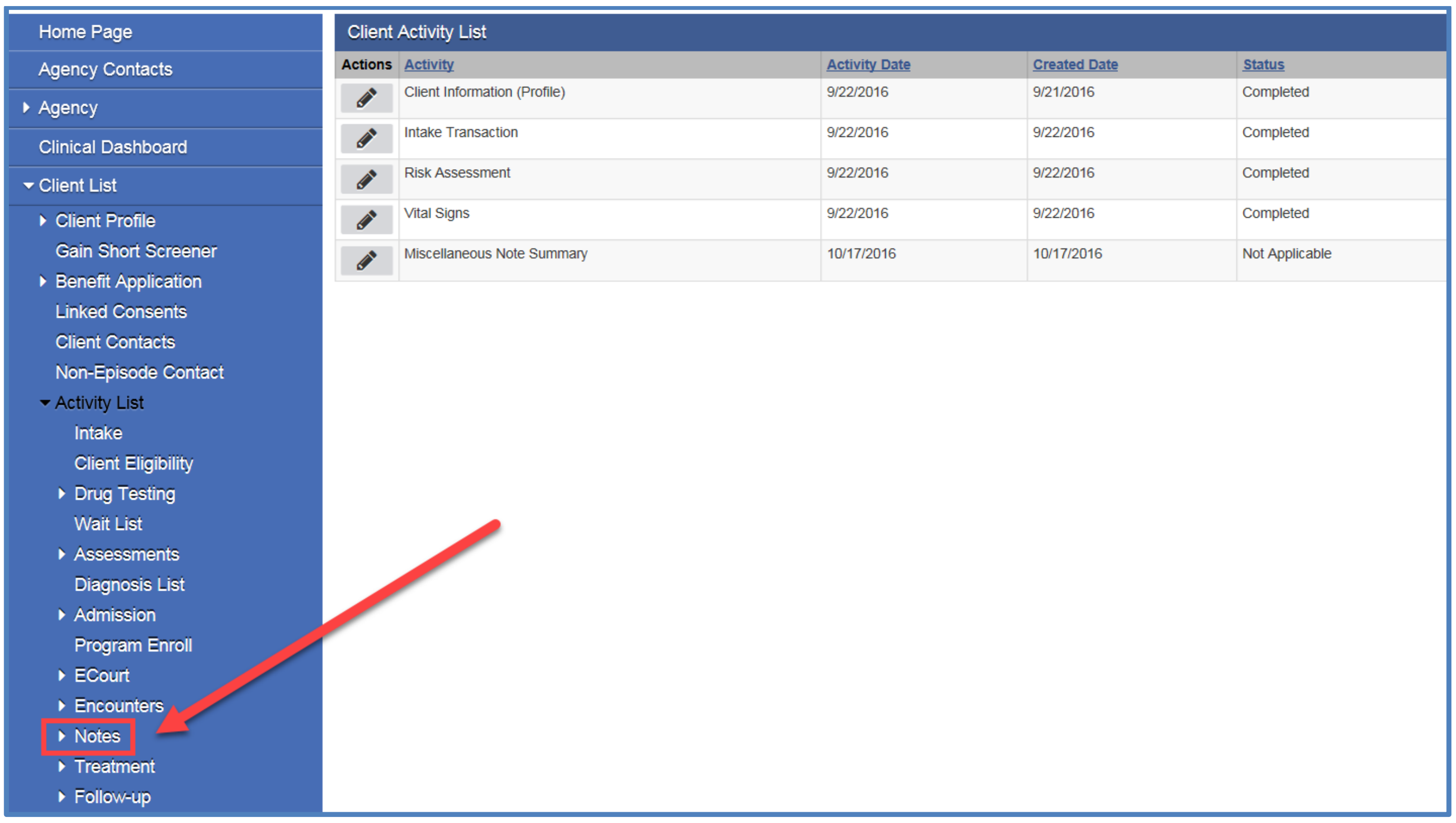
6. The report will display as a PDF in a separate window. Click  (the print icon). Close the window when finished.



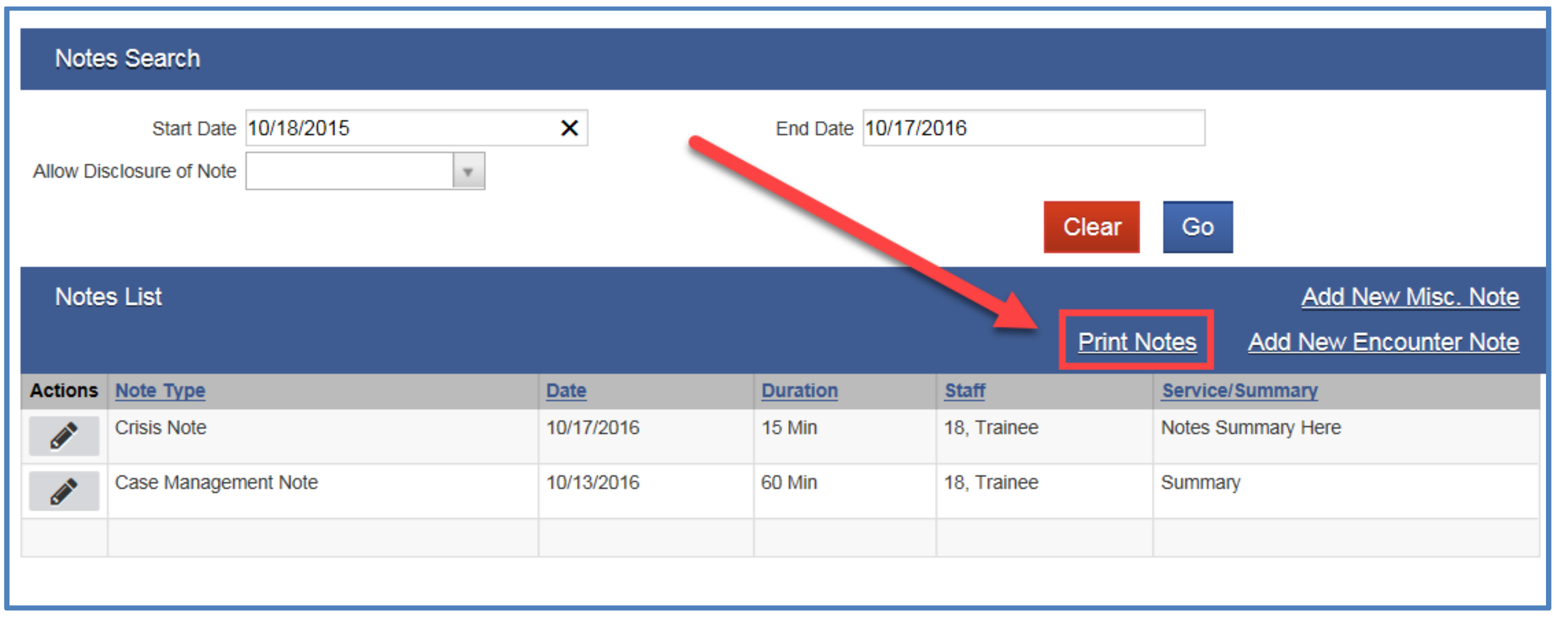
7. Click  .

Printing multiple Miscellaneous Notes from the Notes List

1. Begin on the Client Activity List.

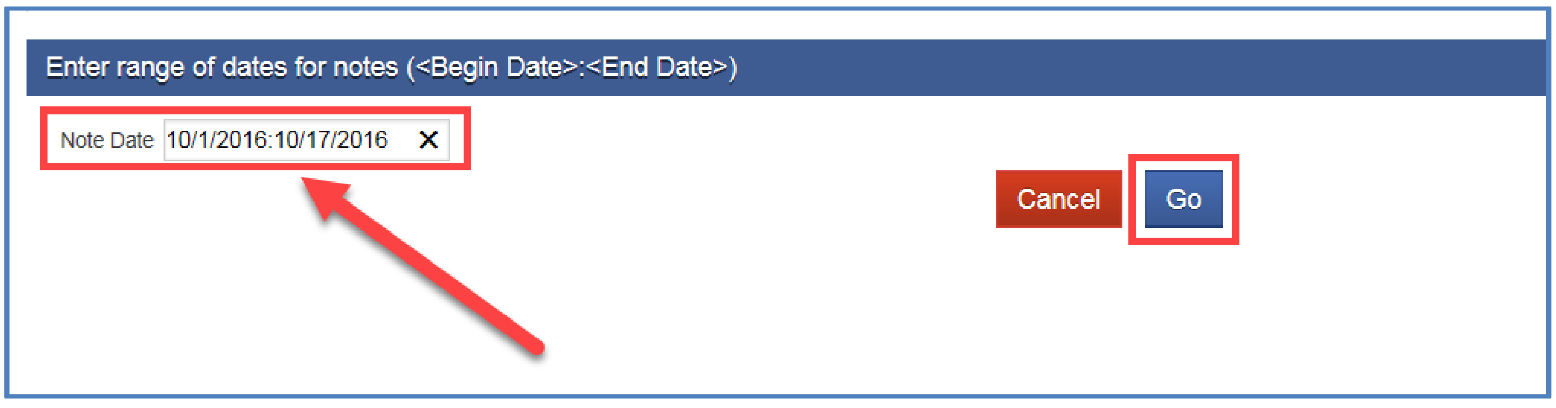


2. Once you're on the Activity List, click Notes on the blue navigation pane.

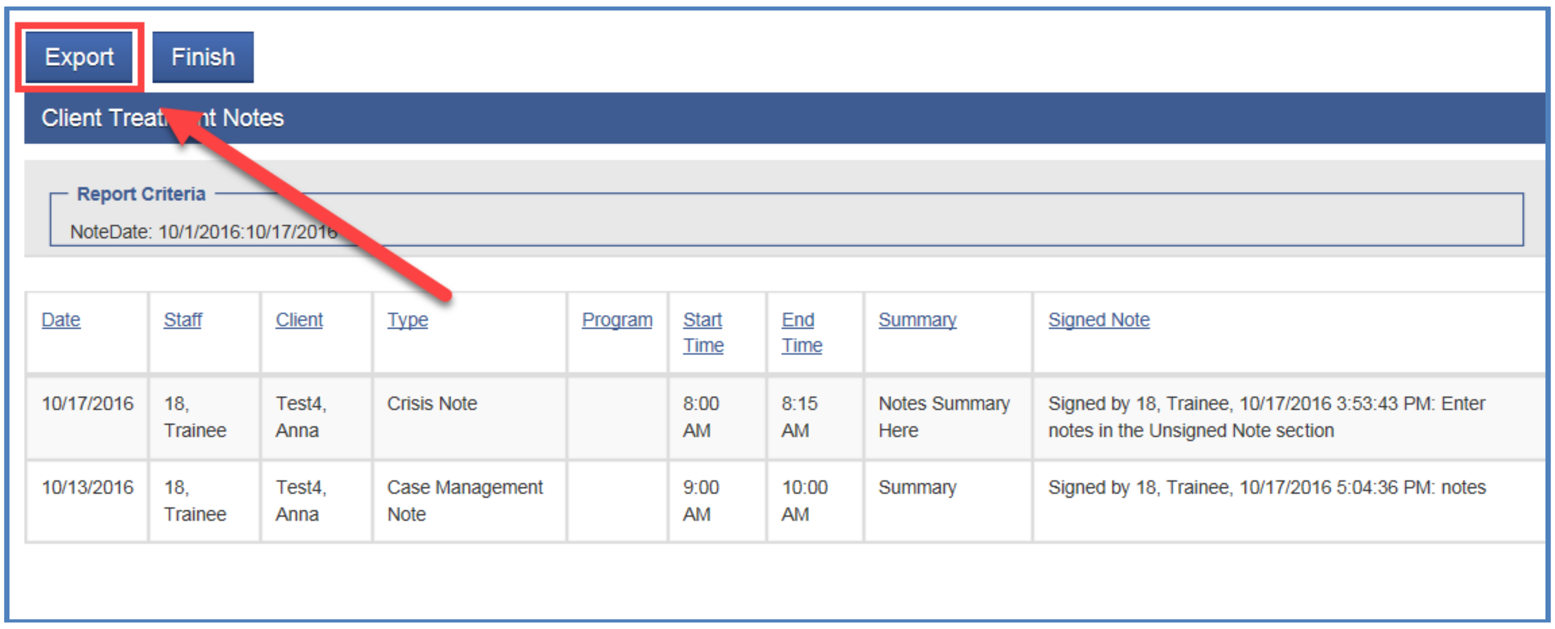


3. The Note Search page displays. Click Print Notes.

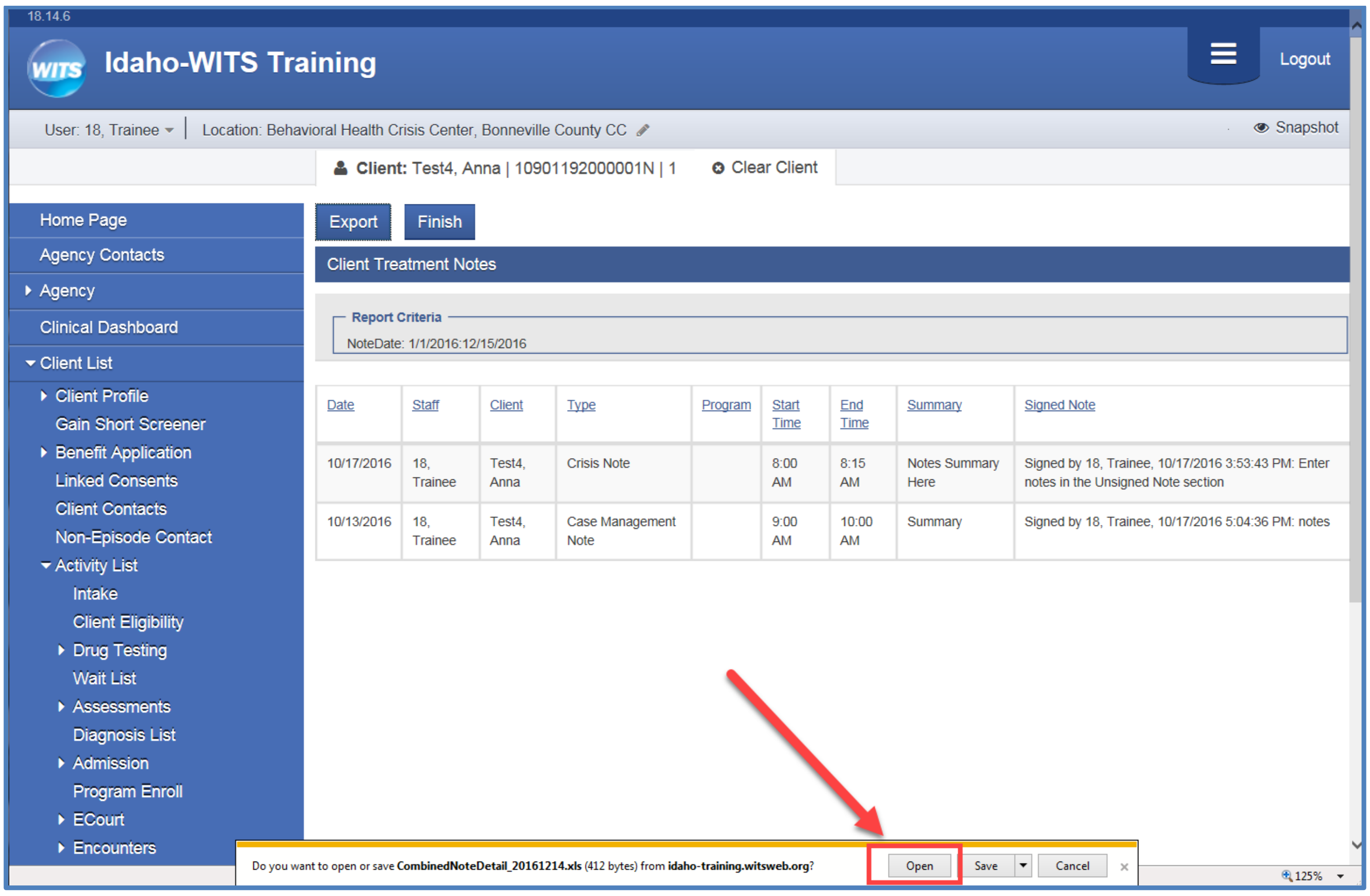
To specify a date range enter the Note Date with the format: Start Date : End Date. See the screenshot below for an example.



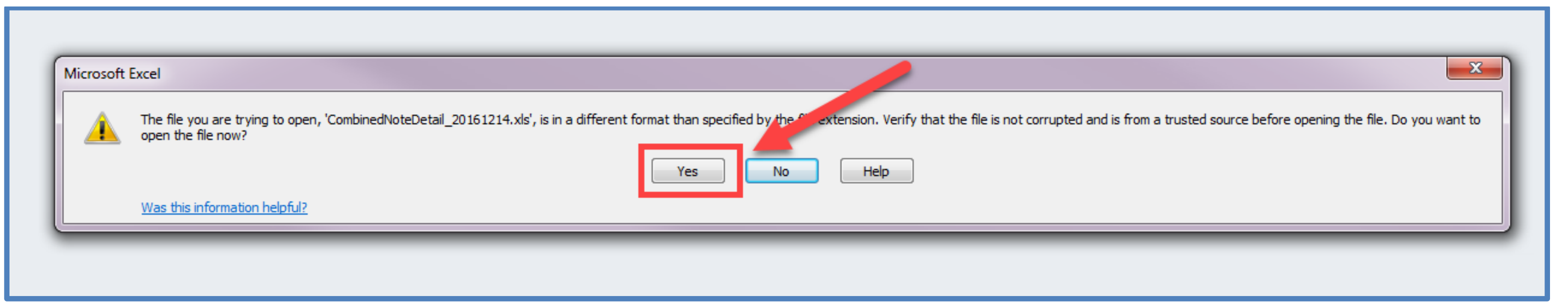
4. Complete the Date Range for the notes and click Go.



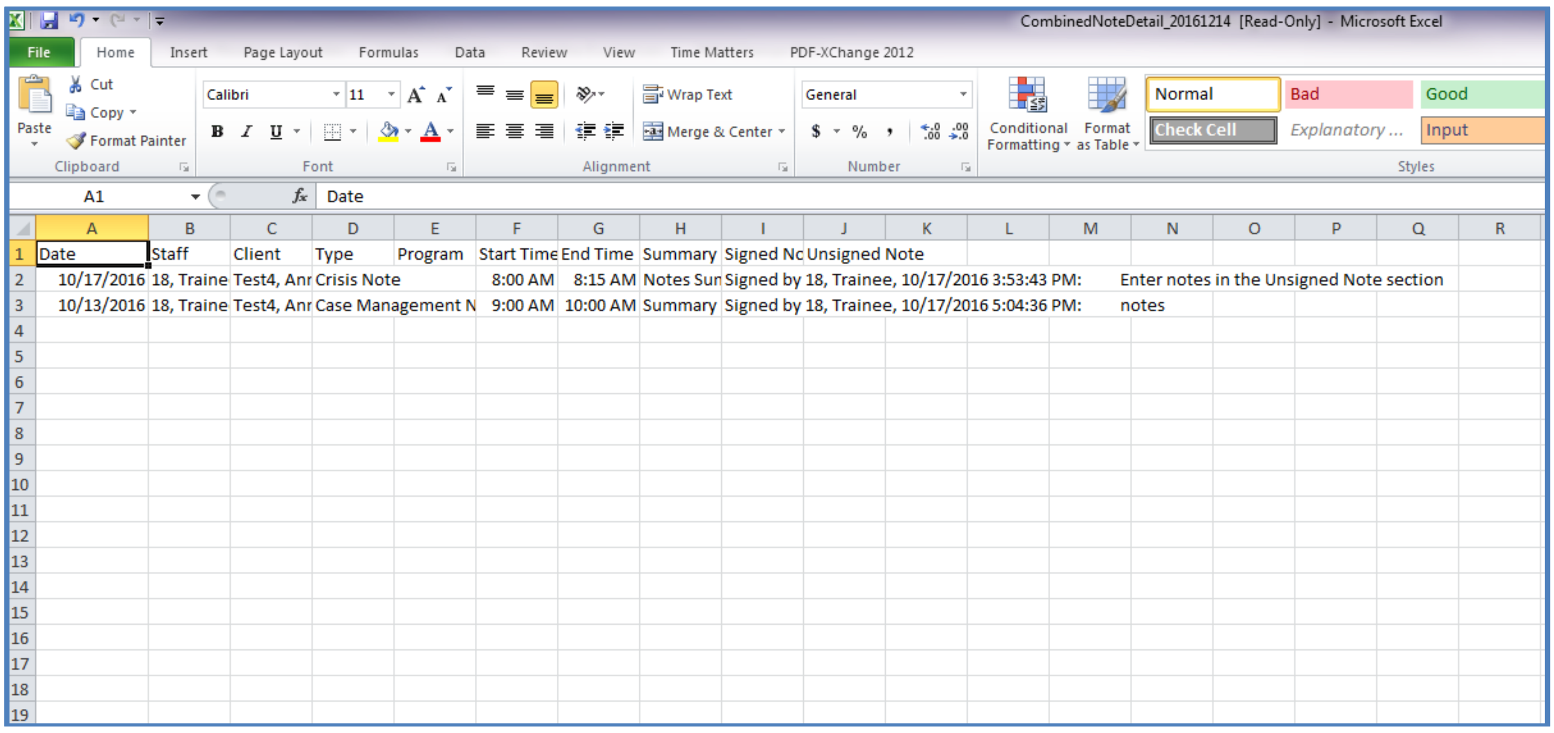
5. The Client Notes display for the selected date range. Export it to Excel by clicking Export.



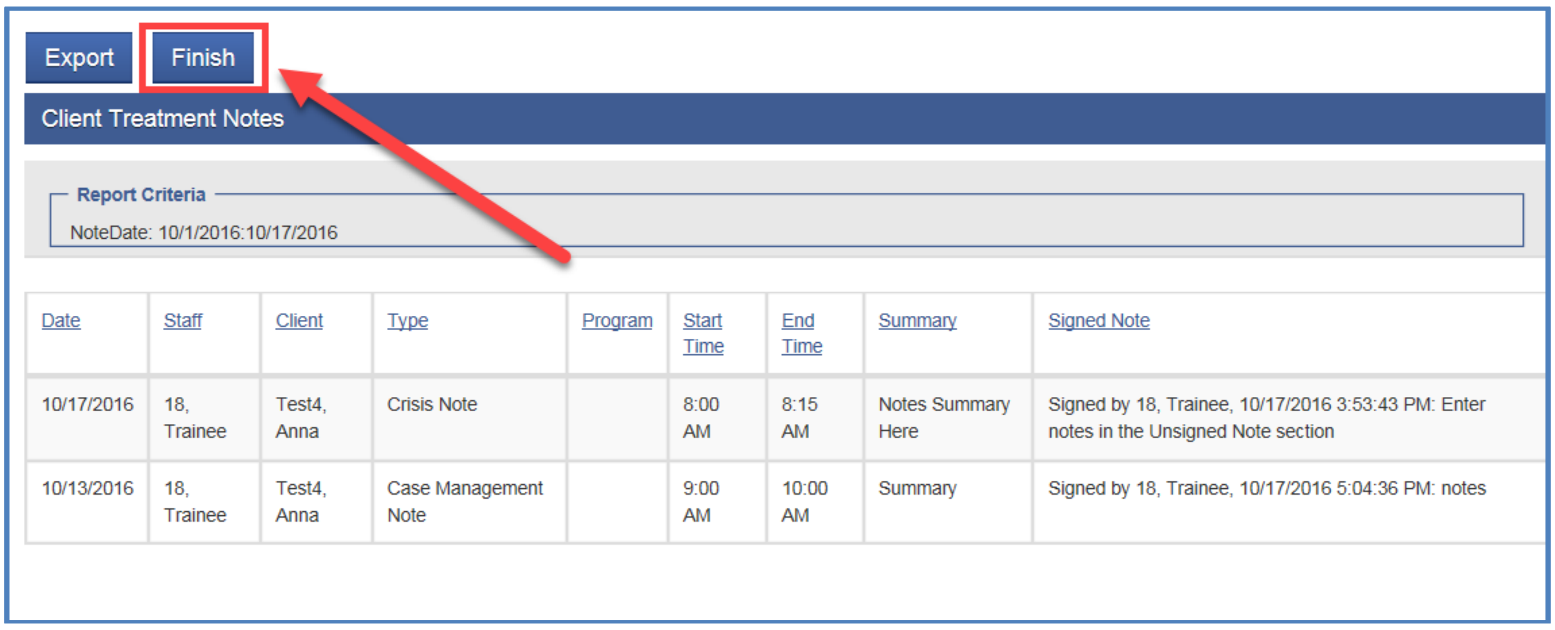
6. Click Open.



7. If the warning message above displays, click Yes.



8. The client notes will be displayed in Excel.



9. Click 

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Non-Episode Contact Note

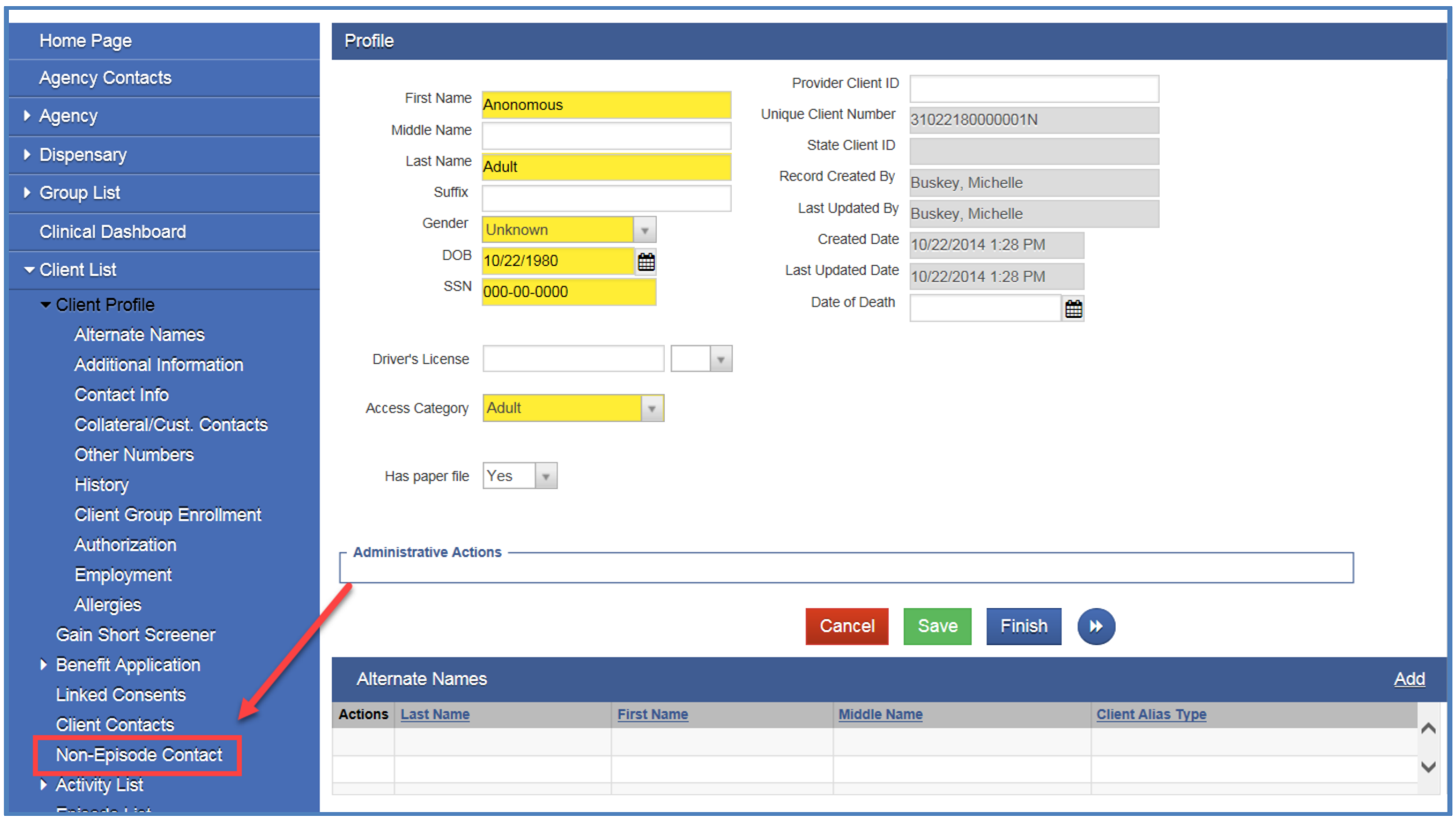
Purpose: Non-episode contact notes record contact with a client or a potential client without starting an episode of care. They should only be used to document when a client contacts the BHCCC and the client is not physically at the BHCCC.

Creating a Non Episode Contact

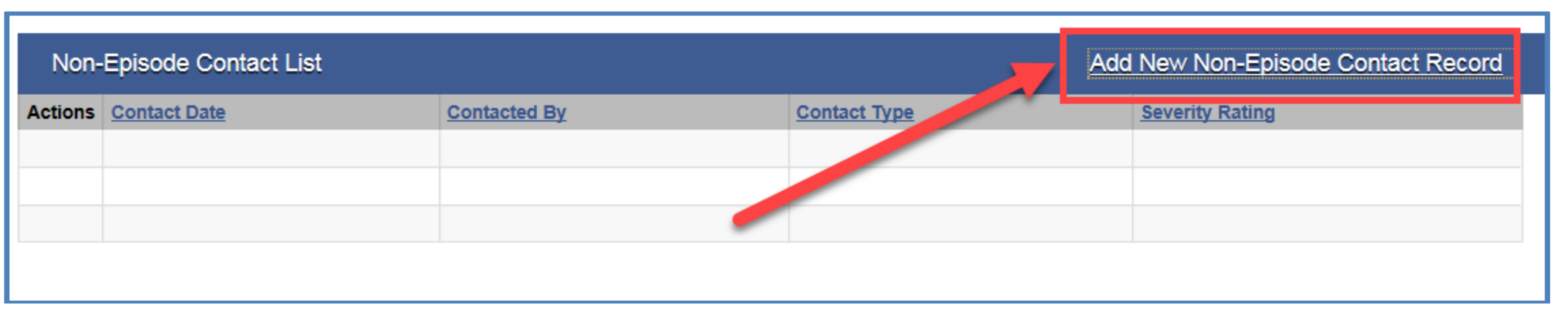
When there is not enough information to create a Client Profile (client's first name, last name, birthdate and SSN), always enter a non-Episode contact note in the Anonymous Adult client record.

When a client contacts the BHCCC and the client is not physically at the BHCCC, create a non-episode contact note to document the activity.

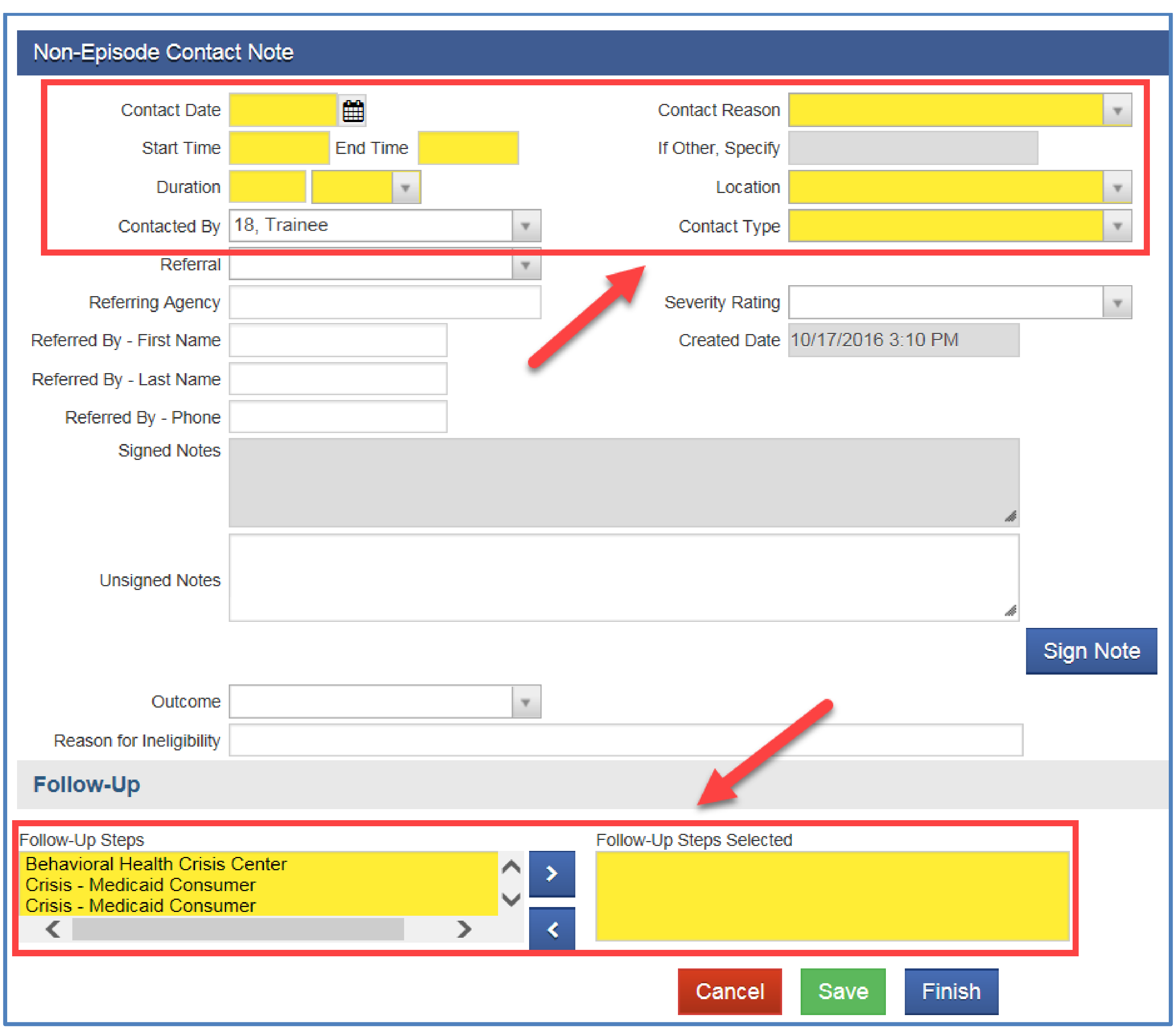
1. Begin on the Client Profile.



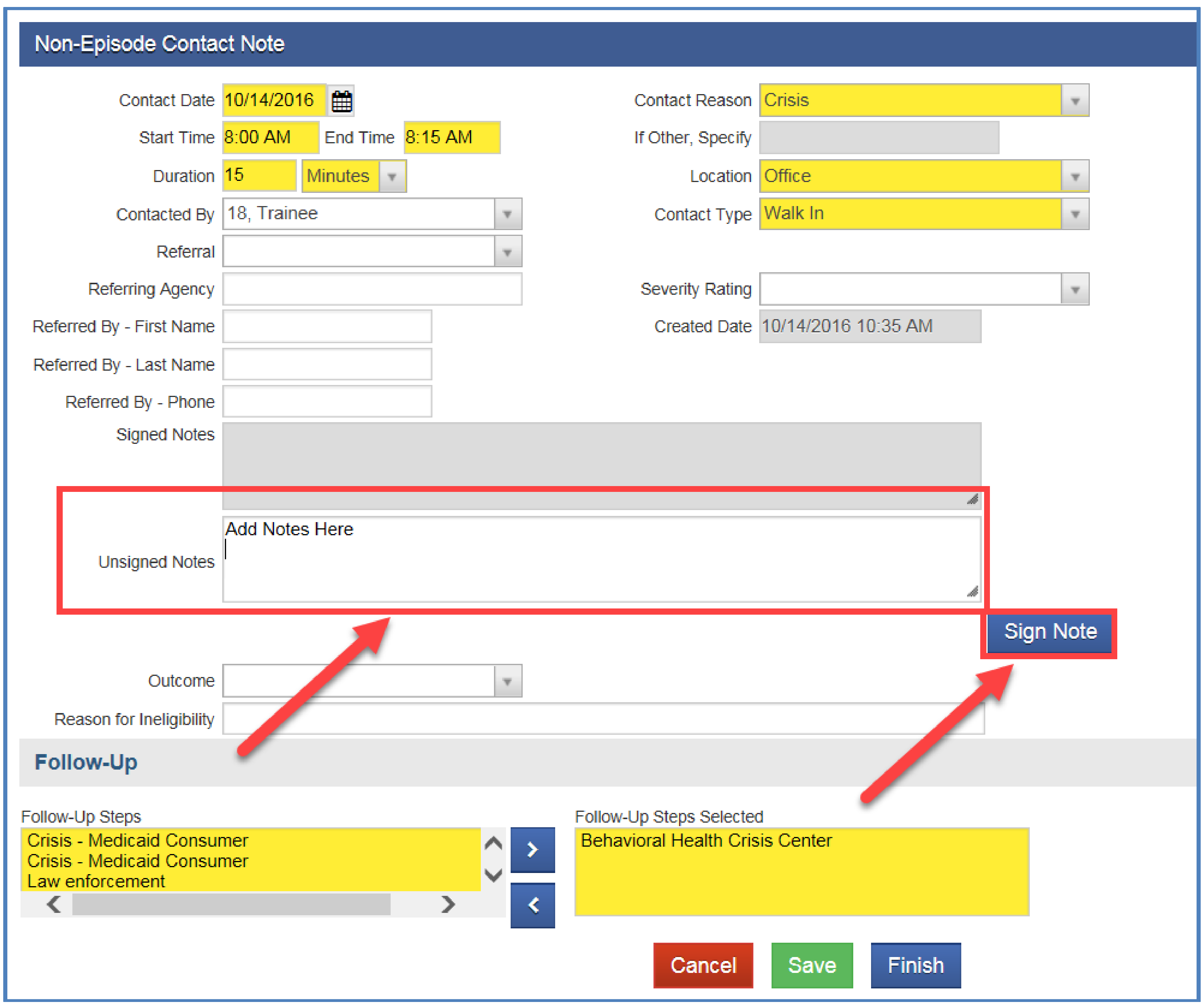
2. Once you're on the Client Profile, click Non-Episode Contact on the blue navigation pane.



3. Click Add New Non-Episode Contact Record.

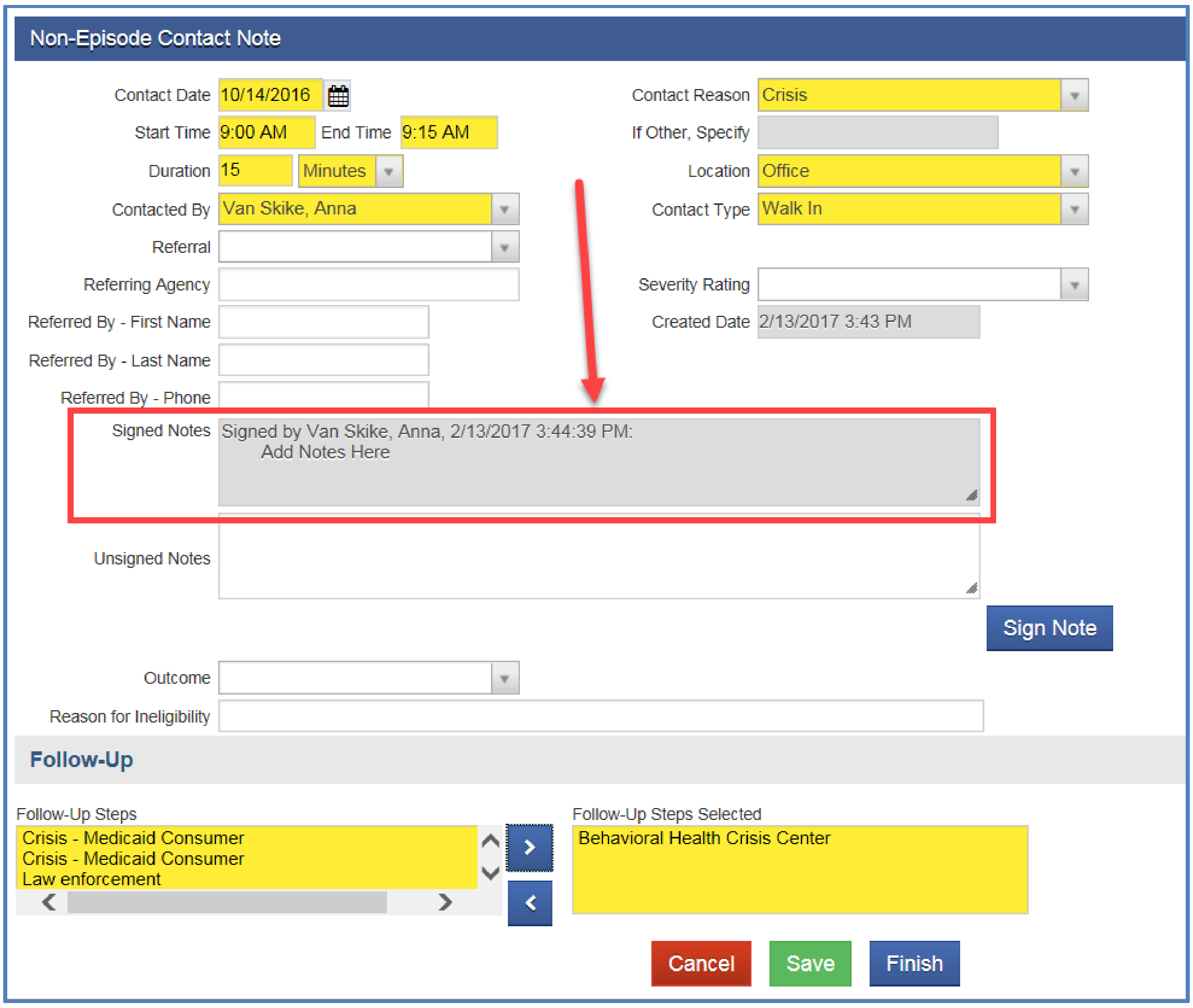


4. Complete the following fields.
    - Contact Date – enter the date.
    - Start Time– enter the start time as HH:MM.
    - End Time– enter the end time as HH:MM.
    - Duration – the field will populate with the duration based on the start and end time.
    - Contacted By – the field will populate with the name of the person creating the non-episode contact. Update as needed.
    - Contact Reason – select the contact reason.
    - Location – select the location of the client.
    - Contact Type – select the contact type.
    - Follow-Up Steps – select all applicable follow-up step(s) and move to Follow-Up Steps Selected.

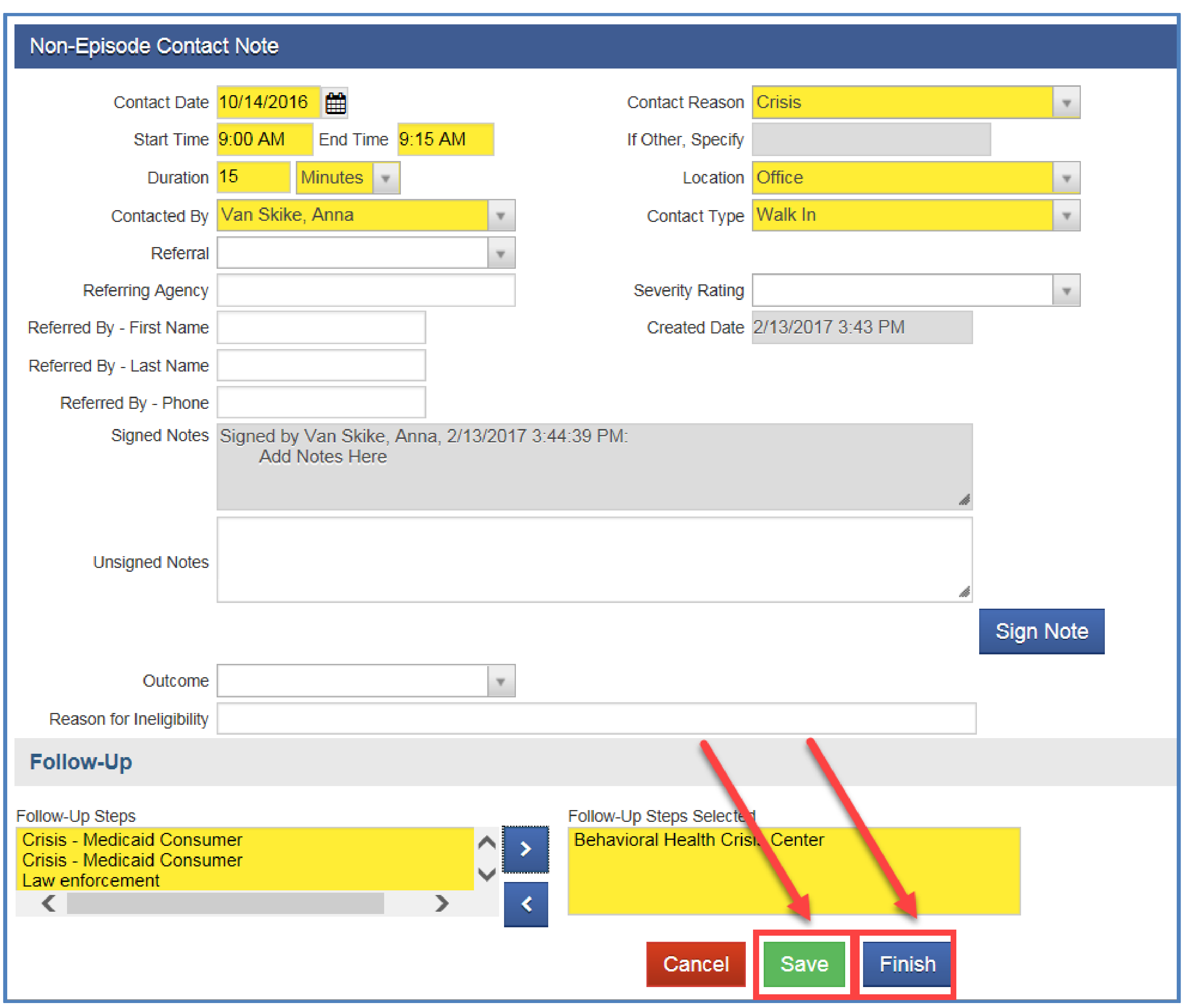


5. Enter notes in the Unsigned Note section.

6. When the notes are complete, click .



7. The Signed Note becomes Read Only and an electronic signature and time stamp is created in the Signed Notes section.



8. Click Save and Finish.

Deleting a Non-Episode Contact Note

Non-Episode Contact Notes in WITS are considered a part of the client's official electronic health record (EHR). It is your agencies responsibility to ensure you are adhering to the documentation standards set forth by IDAPA.

Contact your Agency WITS Administrator for assistance requesting the deletion of a Non-Episode Contact Note.

Program Enrollment

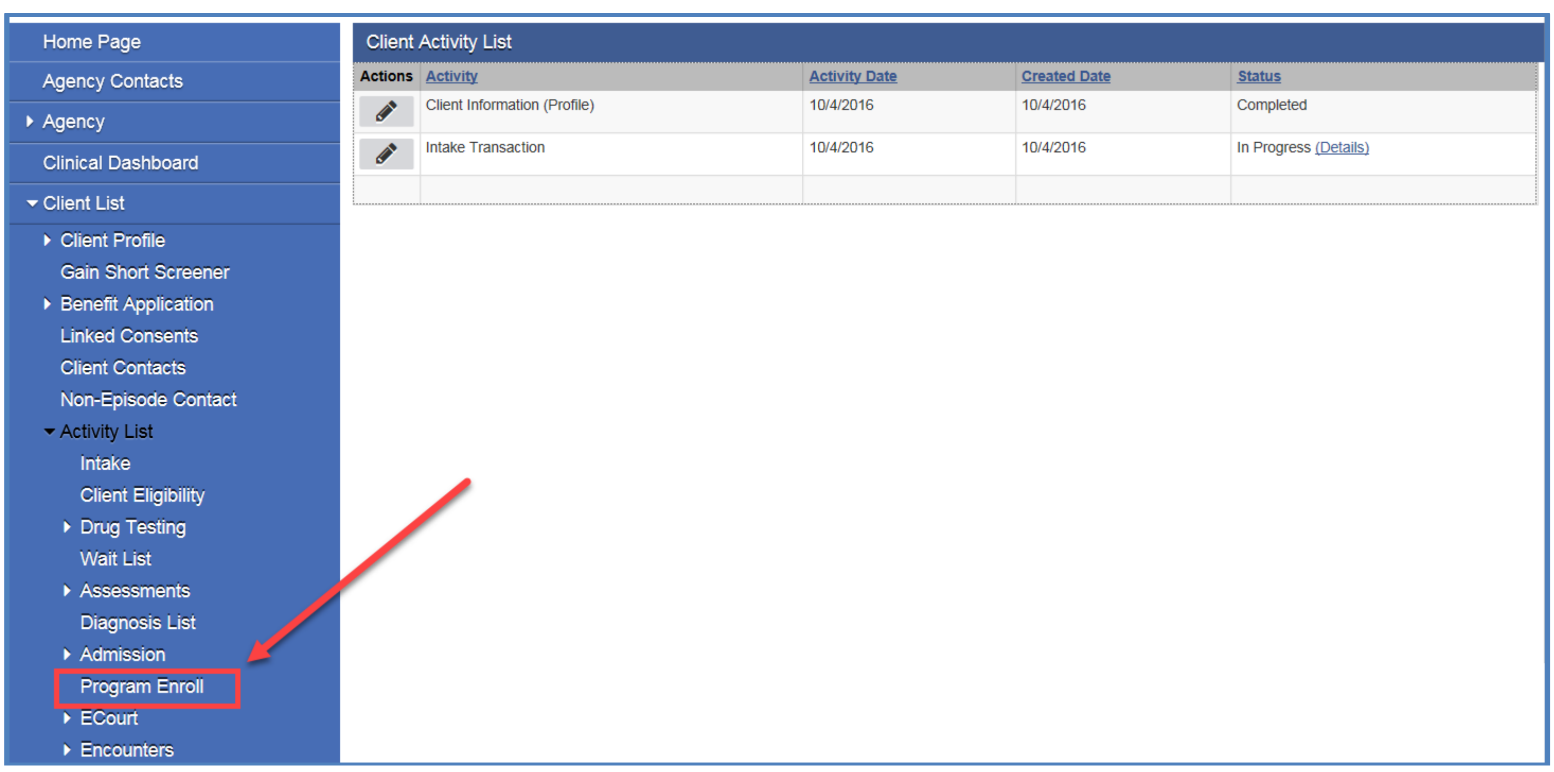
Purpose: The Crisis Program Enrollment allows a Crisis Evaluation to be created.

Creating a Crisis Program Enrollment

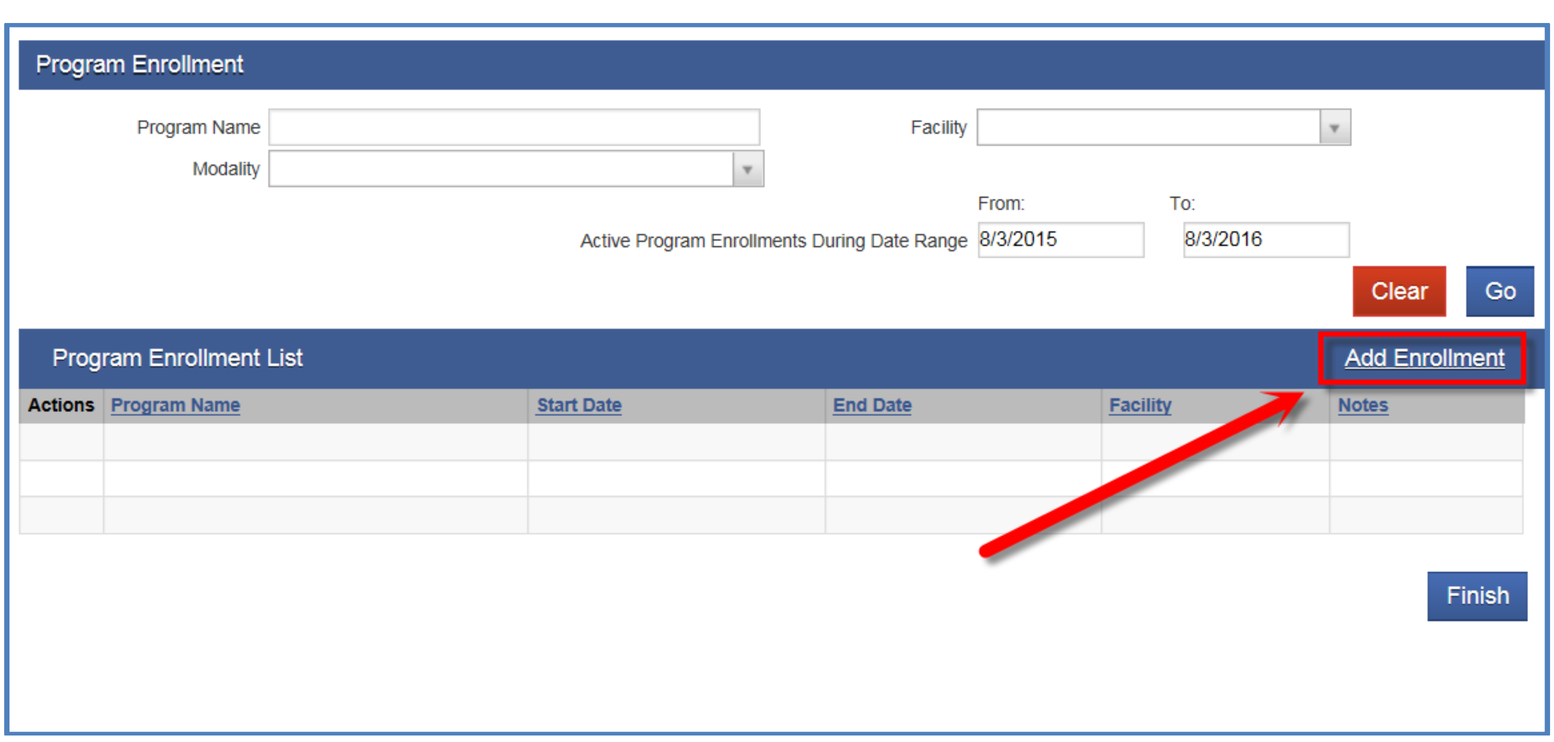
An Intake and a Crisis Program Enrollment must be created before a Crisis Evaluation can be conducted.

Only one Crisis Program Enrollment is allowed in each episode of care.

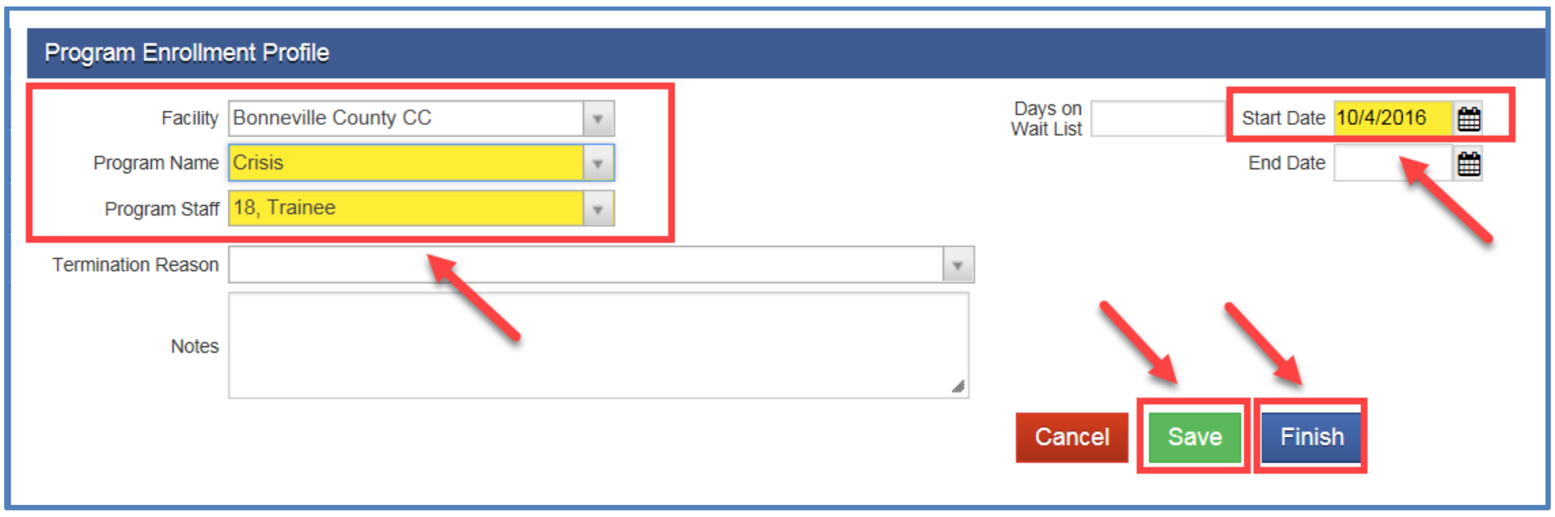
1. Begin on the Client Activity List.



2. Once you're on the Client Activity List, click **Program Enroll** on the blue navigation pane.



3. Click Add Enrollment.



4. Complete the following fields.
   - Facility – the field will populate with the facility selected on the Intake (where the client is receiving services).
   - Program Name – select Crisis.
   - Program Staff – the field will populate with the name of the person creating the Program Enrollment. Update as needed.
   - Start Date – the field will populate with today's date. Update as needed.

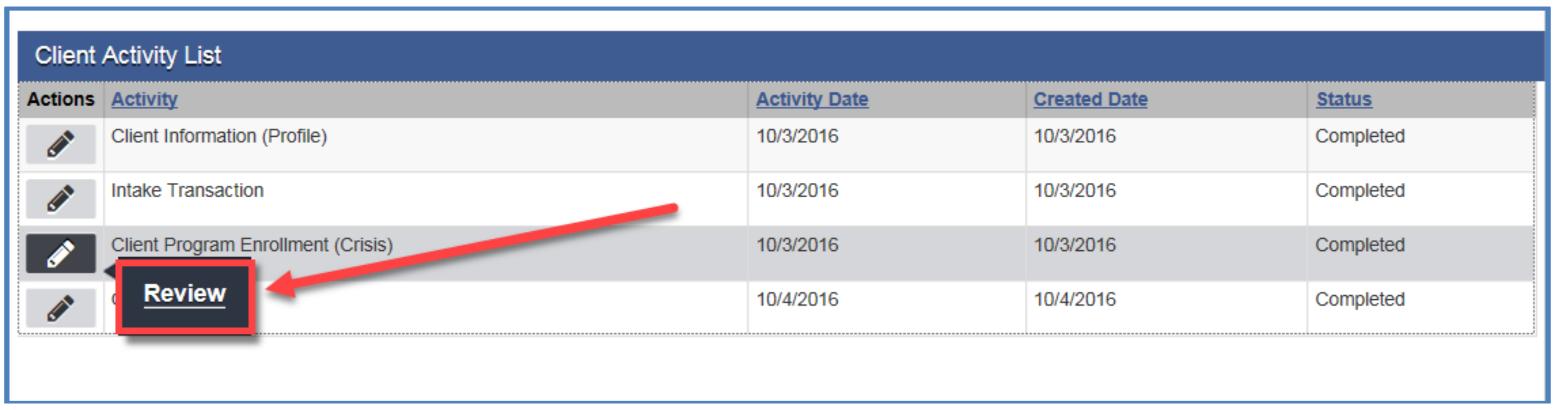
5. Click Save and Finish.

6. Clicking Save will immediately open the Crisis Evaluation.

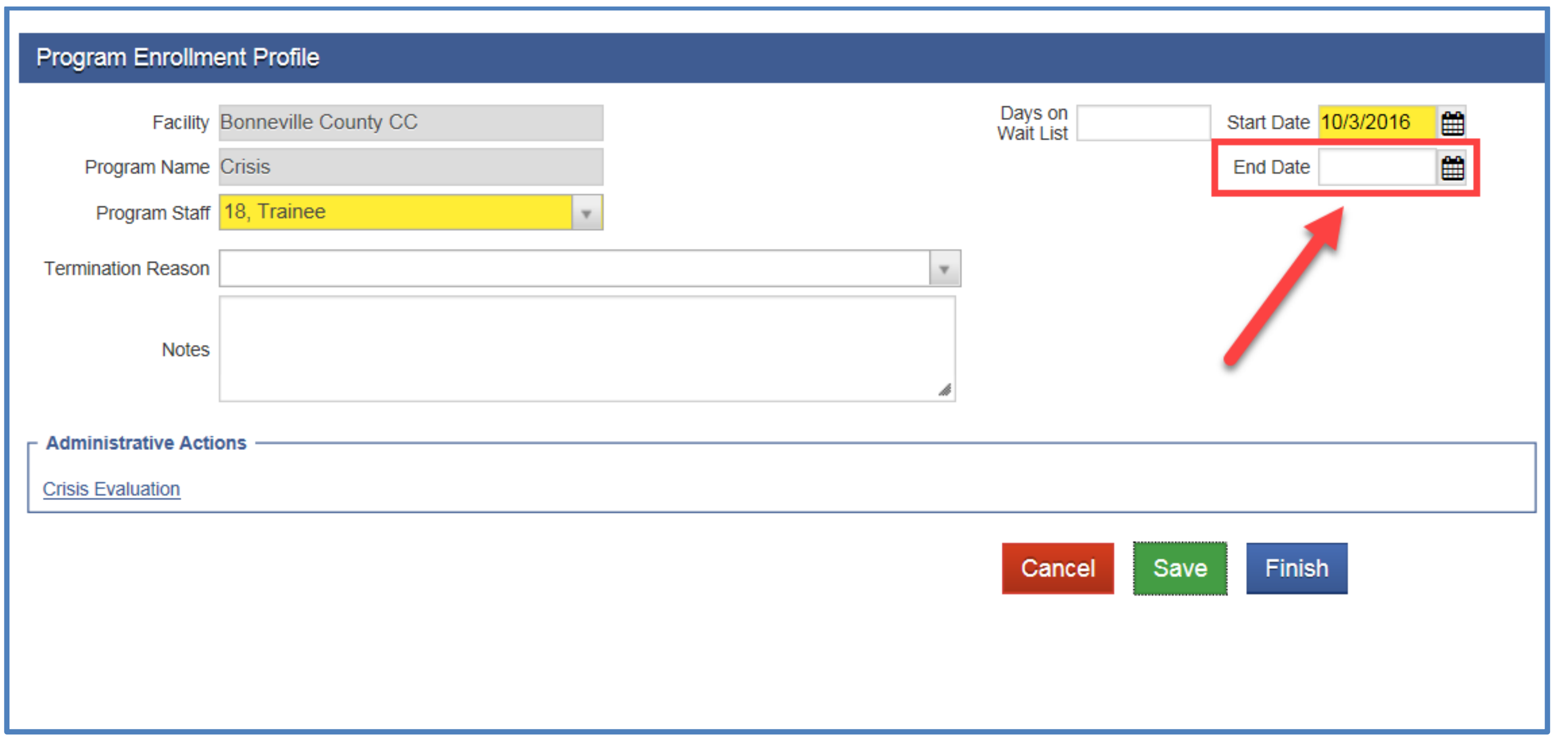
Closing a Crisis Program Enrollment

STANDARDS The Crisis Evaluation must have a status of completed before the Crisis Program Enrollment can be closed.

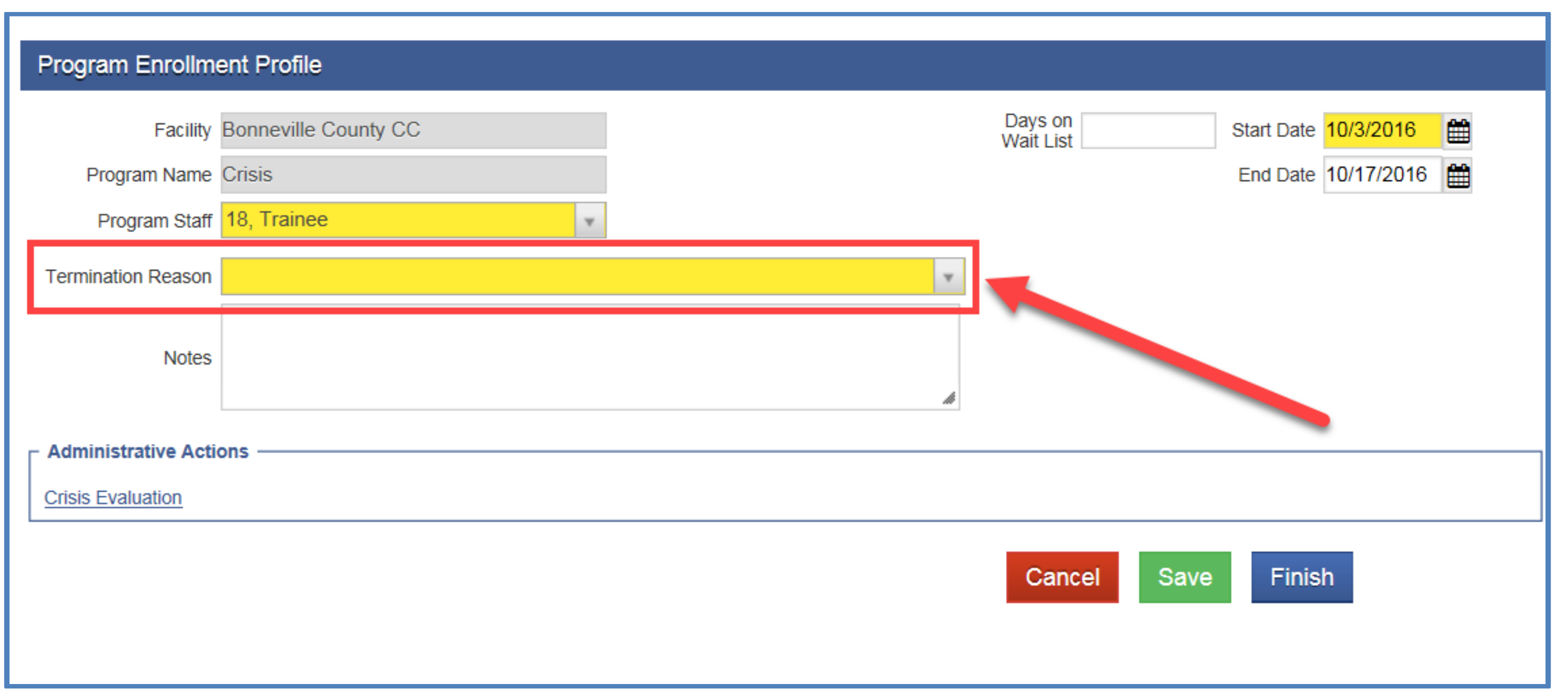
1. Begin on the Client Activity List.



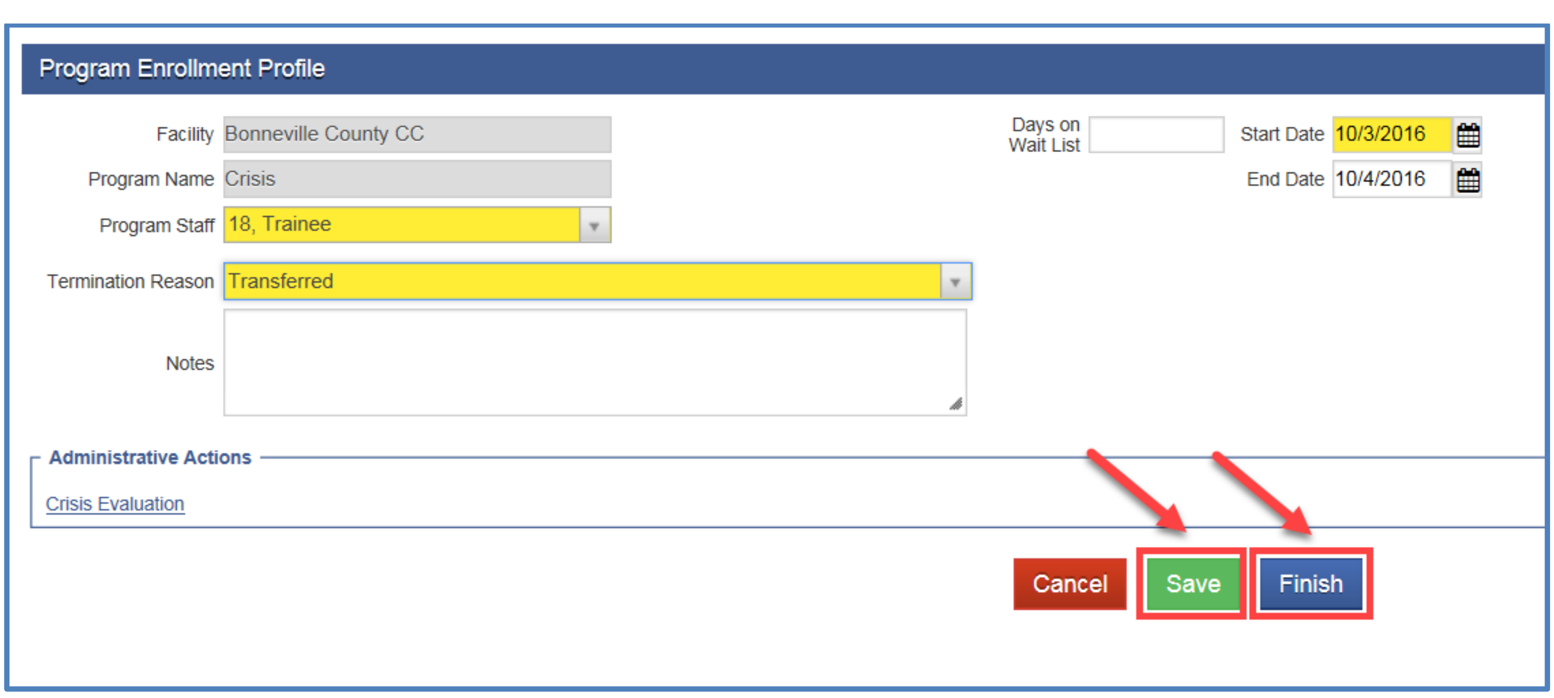
2. Once you're on the Client Activity List, hover over the pencil icon and click Review under Actions for the Crisis Program Enrollment.



3. Enter the End Date (date the client is leaving the BHCCC).



4. Select the Termination Reason (why the client is leaving the BHCCC).



5. Click 

and 

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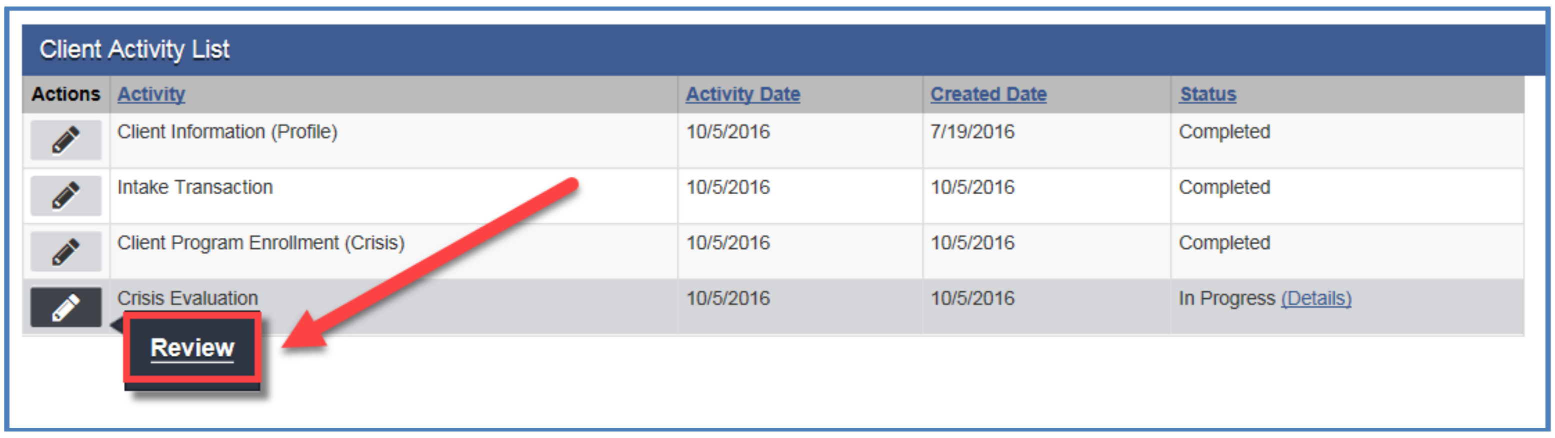
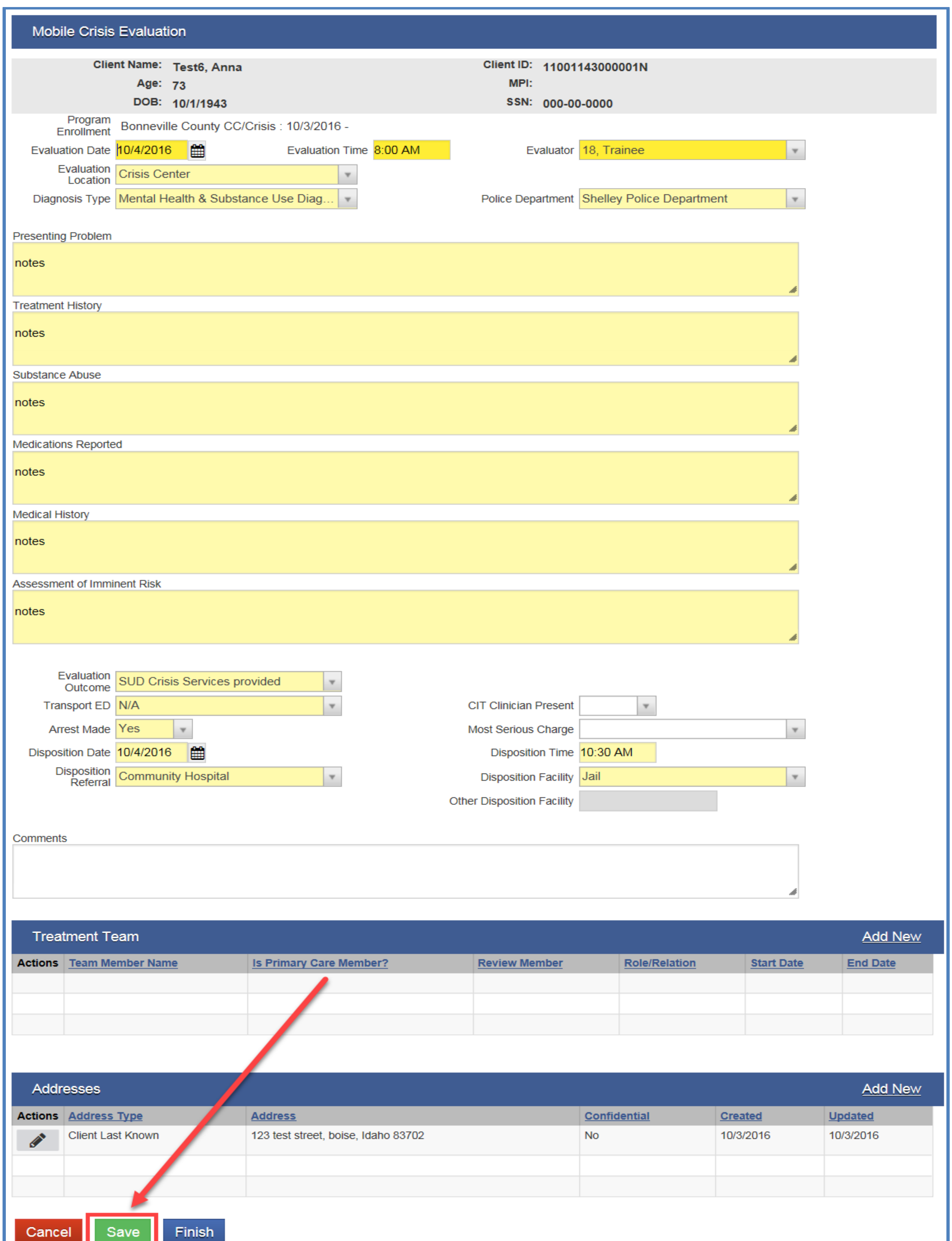
Closing a Crisis Program Enrollment from the Crisis Evaluation

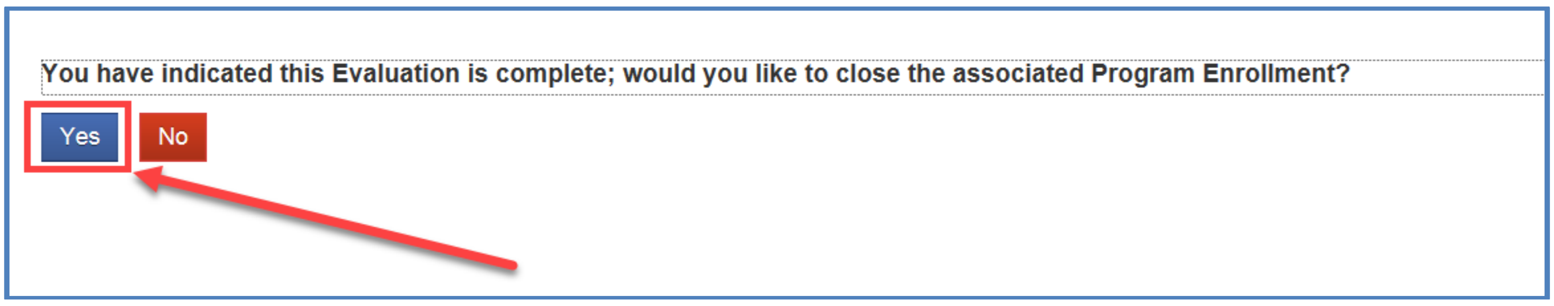
1. Begin on the Client Activity List.



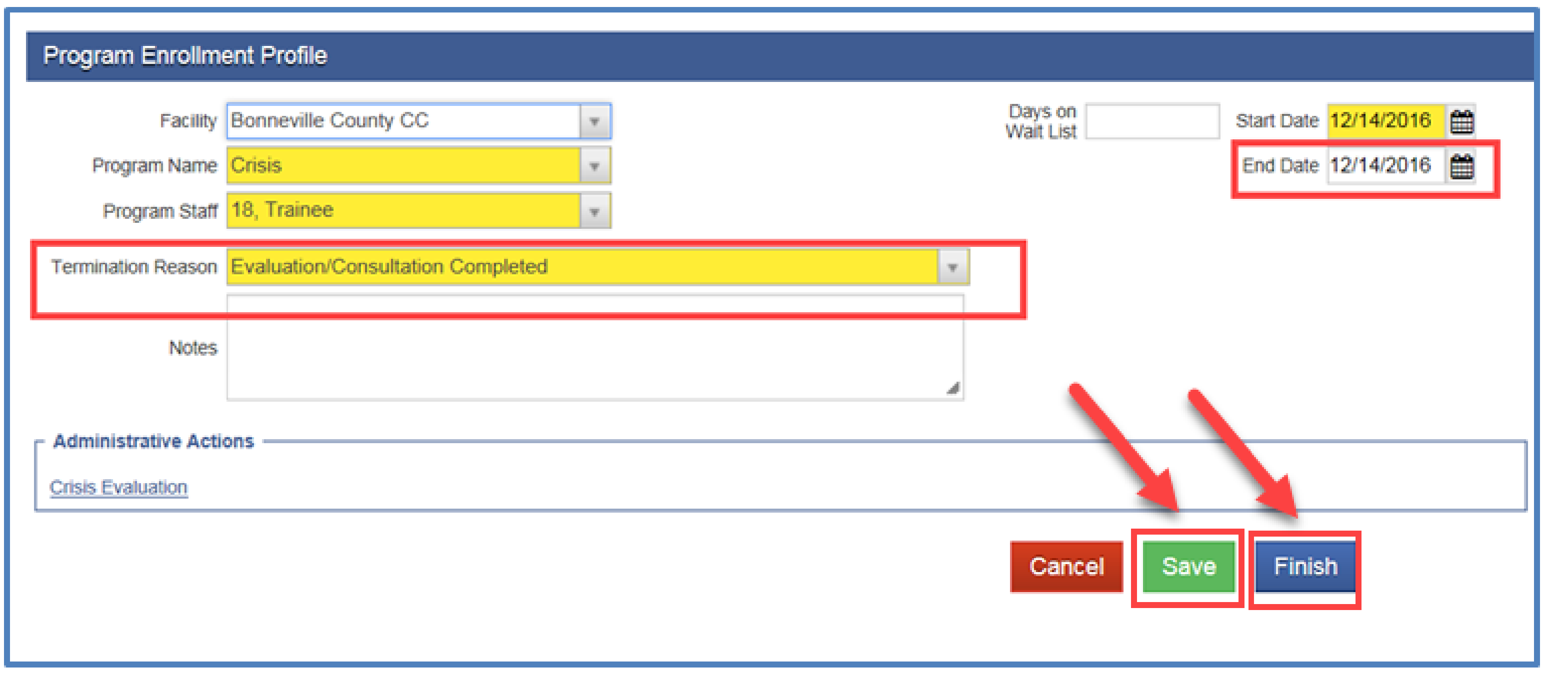
2. Once you're on the Client Activity List, hover over the and click **Review** under Actions for the Crisis Evaluation.



3. Once you're on the Crisis Evaluation and you have completed all the yellow fields, click Save.



4. Click Yes to close the Crisis Program Enrollment or click No to cancel.



5. If you clicked Yes the Program Enrollment Profile will display. The End Date will populate with today's date and the Termination Reason will be Evaluation/Consultation Completed.

6. Click Save and Finish.

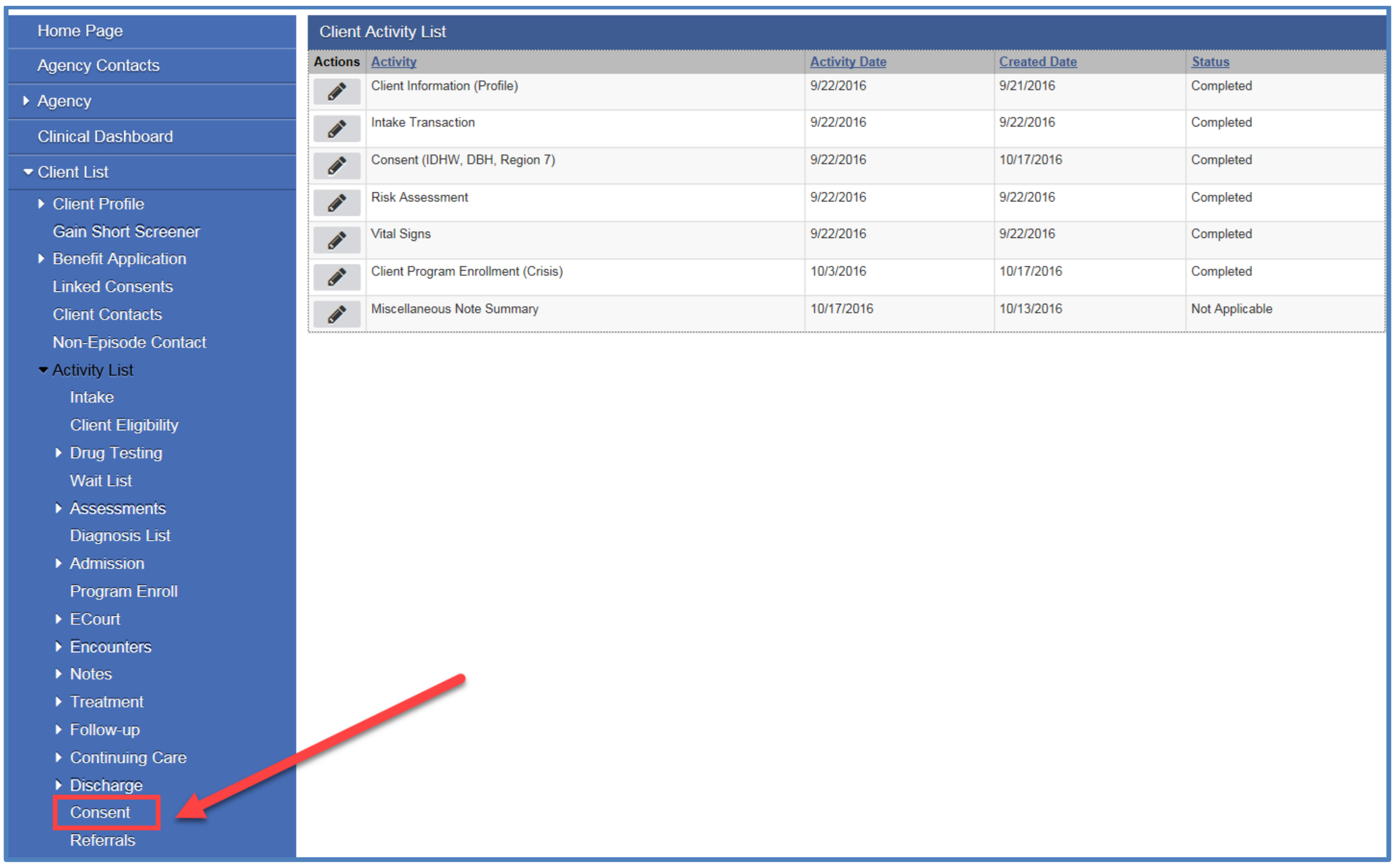
Referrals

Purpose: Referrals are used to refer a client to another agency.

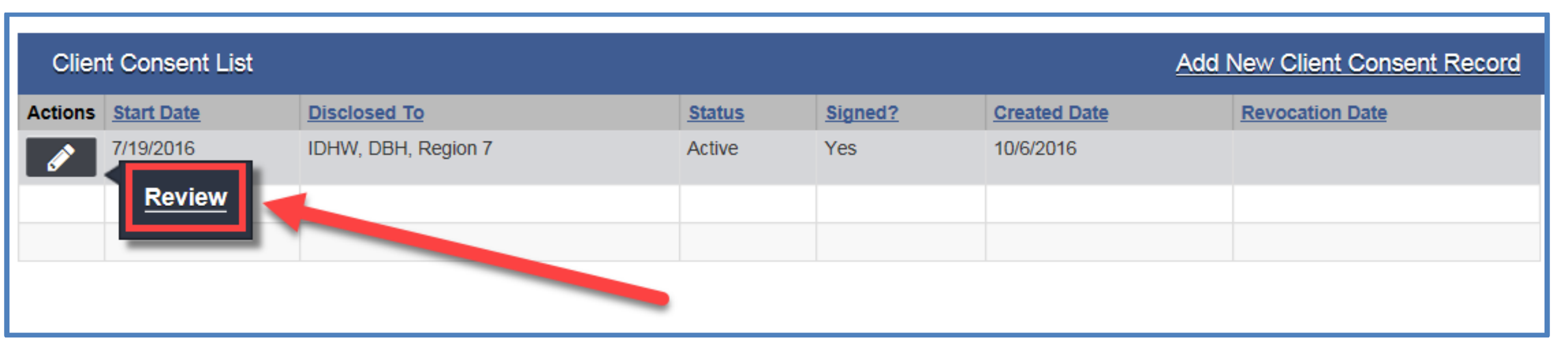
Creating a Referral from the Consent Page

There must be a signed consent in WITS before a Referral record can be saved.

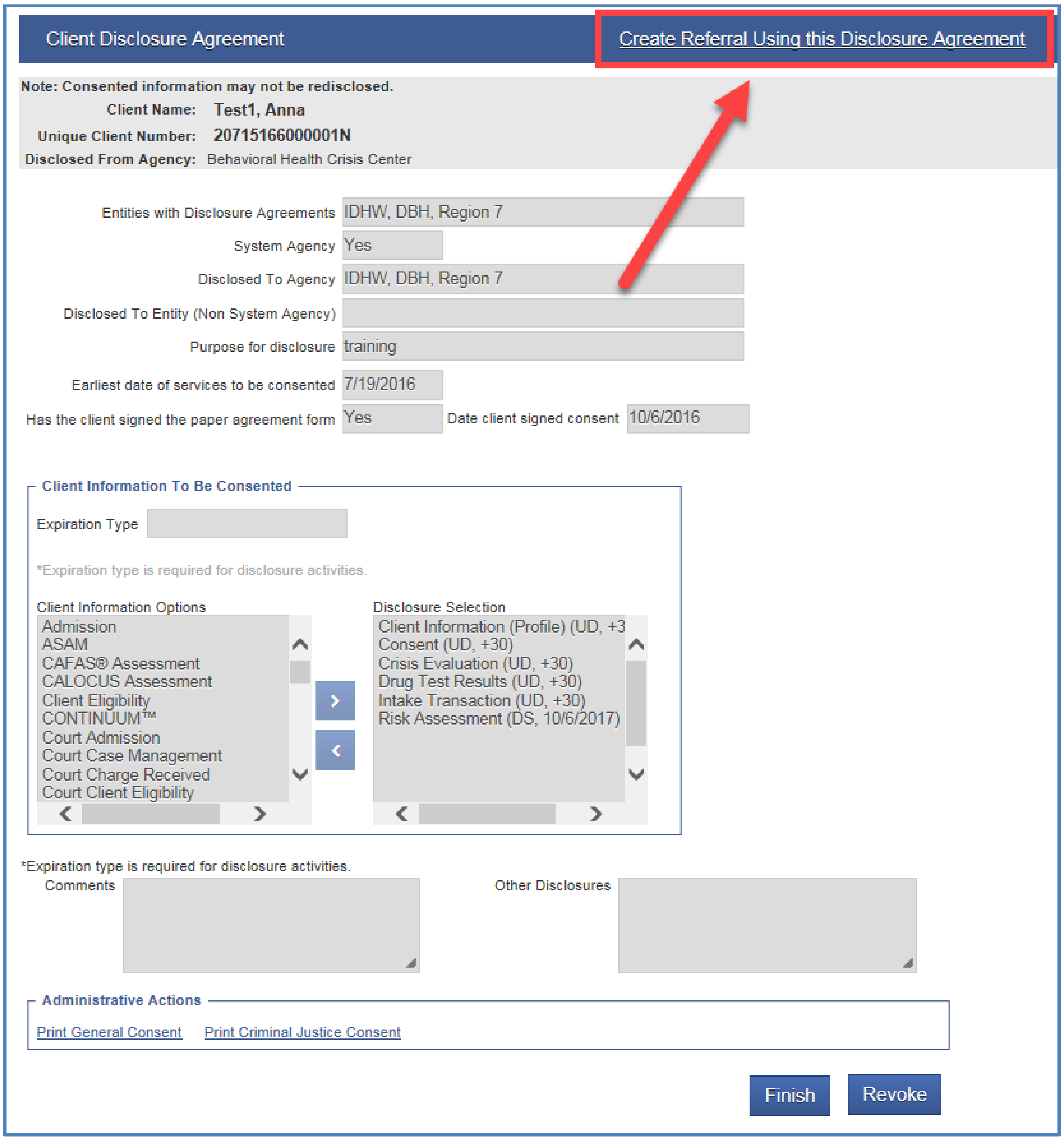
1. Begin on the Client Activity List.



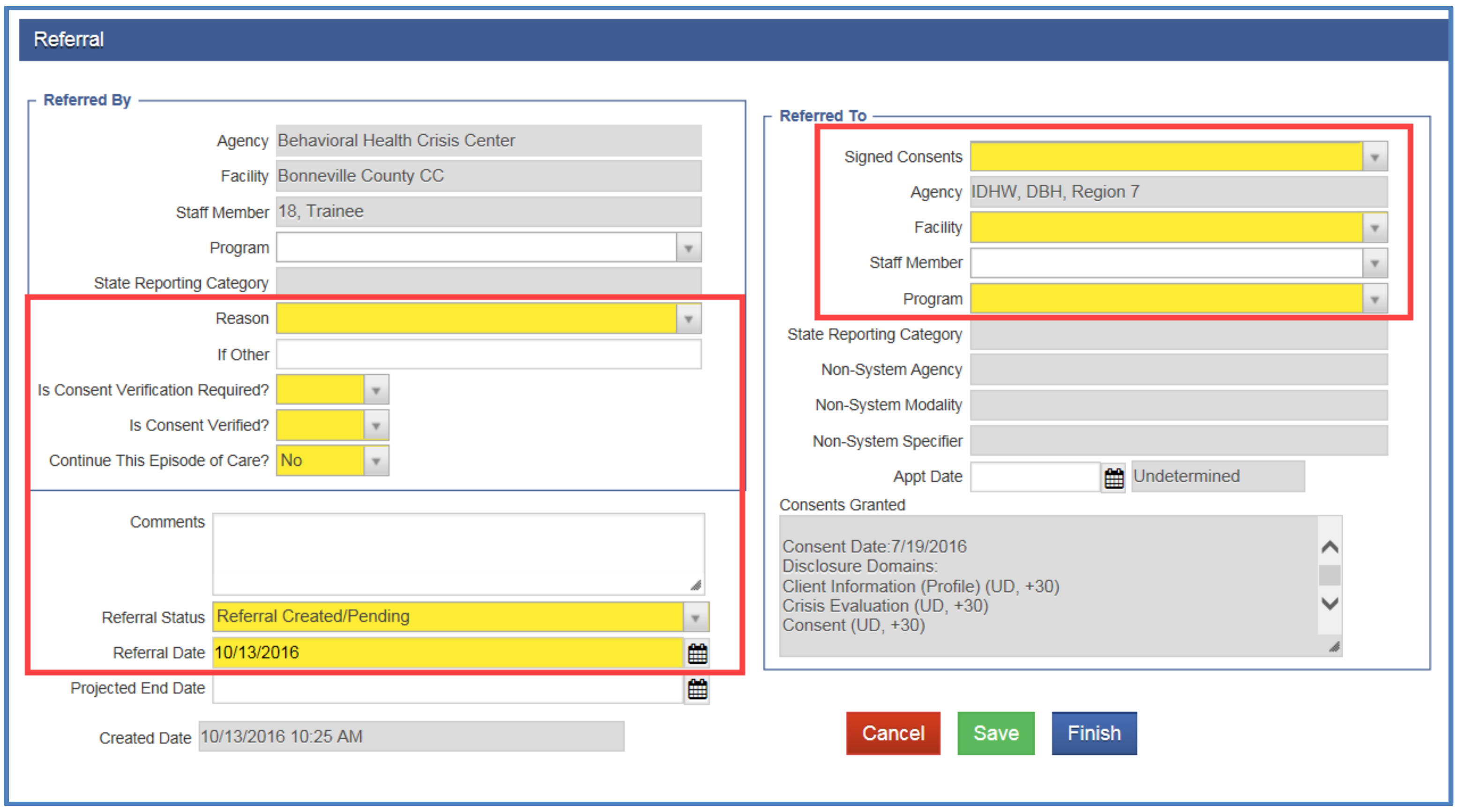
2. Once you're on the Client Activity List, click Consent on the blue navigation pane.



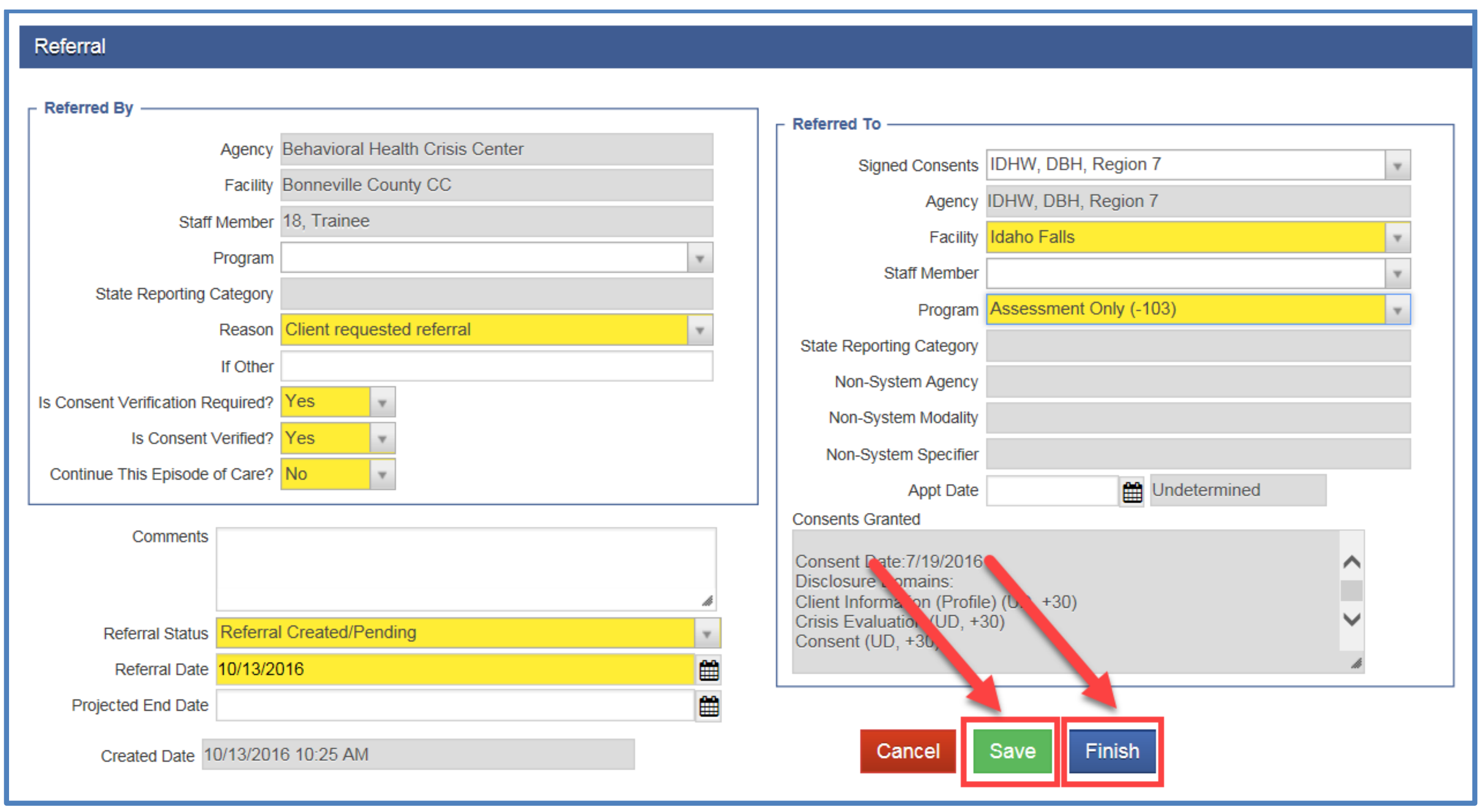
3. Hover over the ✎ and click **Review** under Actions for the consent.



4. Click Create Referral Using this Disclosure Agreement.



5. Complete the following fields.
   - Referred By
     - Reason – select the reason for the Referral.
     - Is Consent Verification Required? – select Yes.
     - Is Consent Verified? – select Yes.
     - Continue This Episode of Care? – select No.
     - Referral Status – the field will populate with Referral Created/Pending.
     - Referral Date – the field will populate with today's date. Update as needed.
   - Referred To
     - Signed Consents – the field will populate the agency selected on the consent.
     - Facility – select the facility for the agency.
     - Program – select the program (typically assessment).

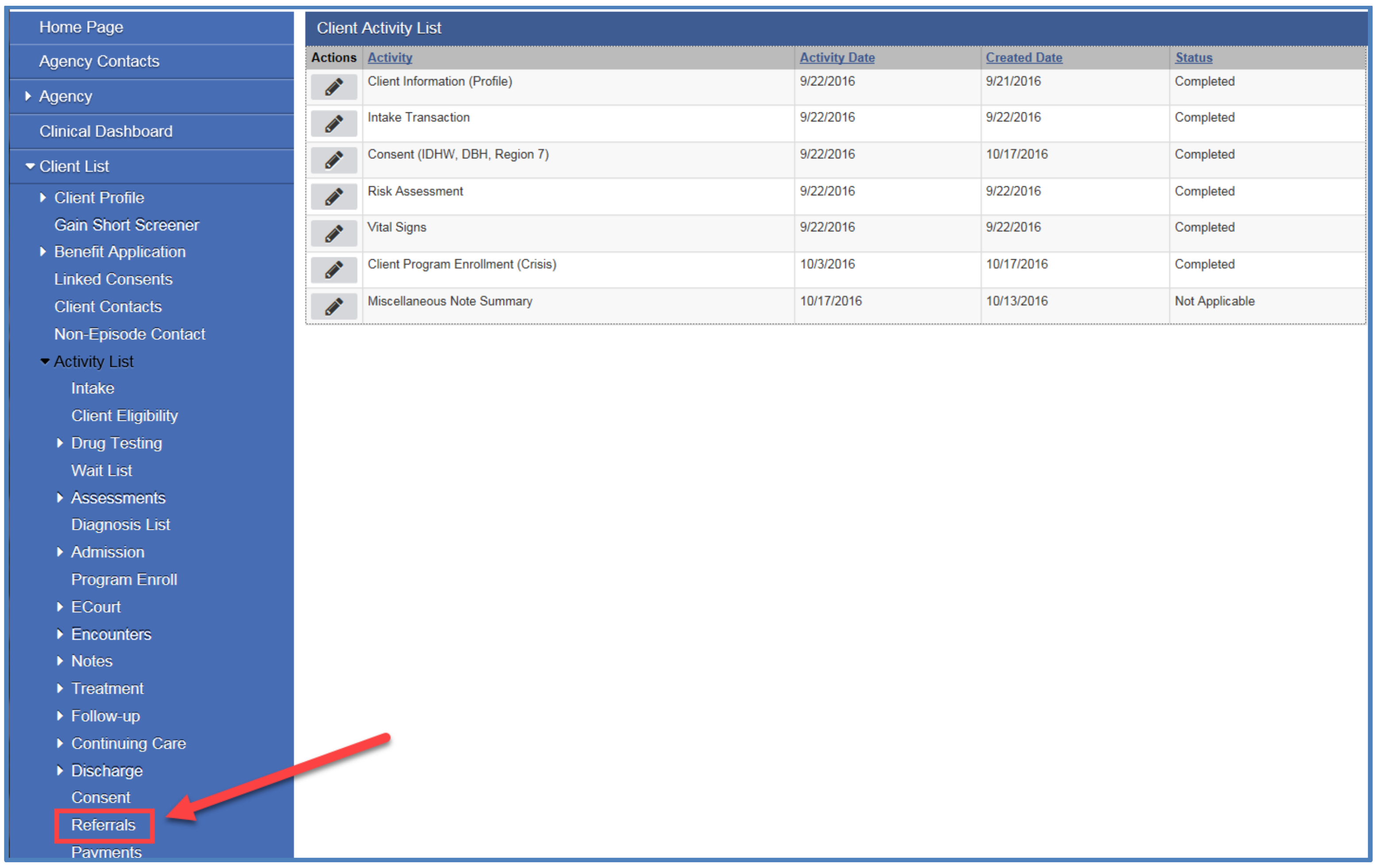


6. Click Save and Finish.

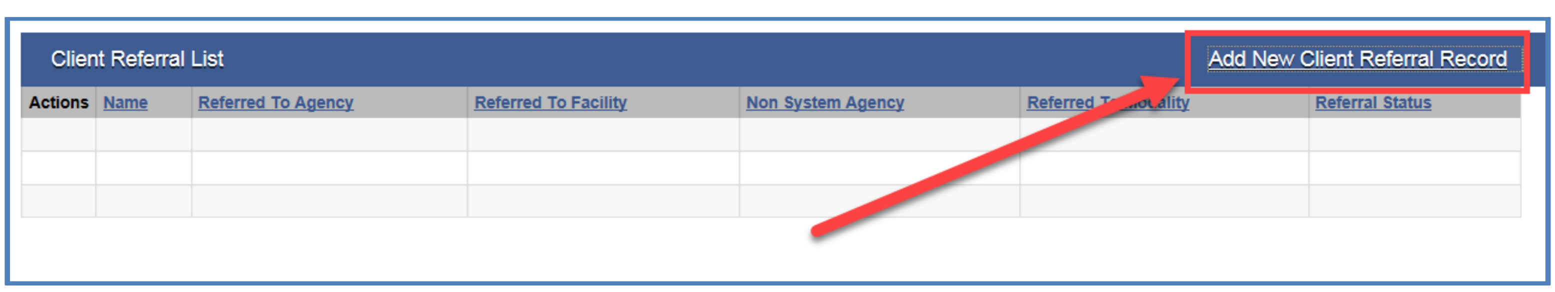
Creating a Referral from the Referral List

There must be a signed consent in WITS before a Referral record can be saved.

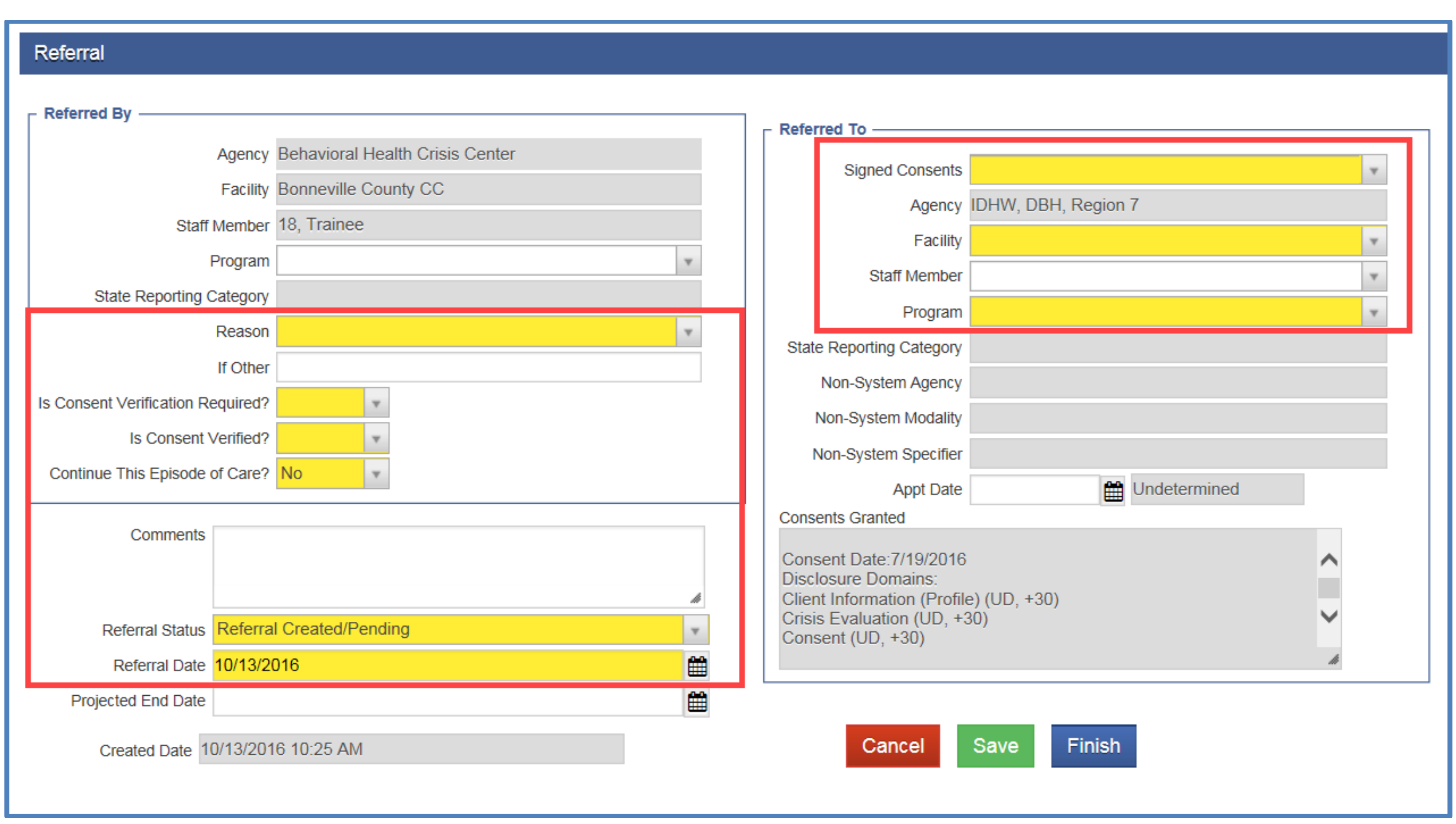
1. Begin on the Client Activity List.



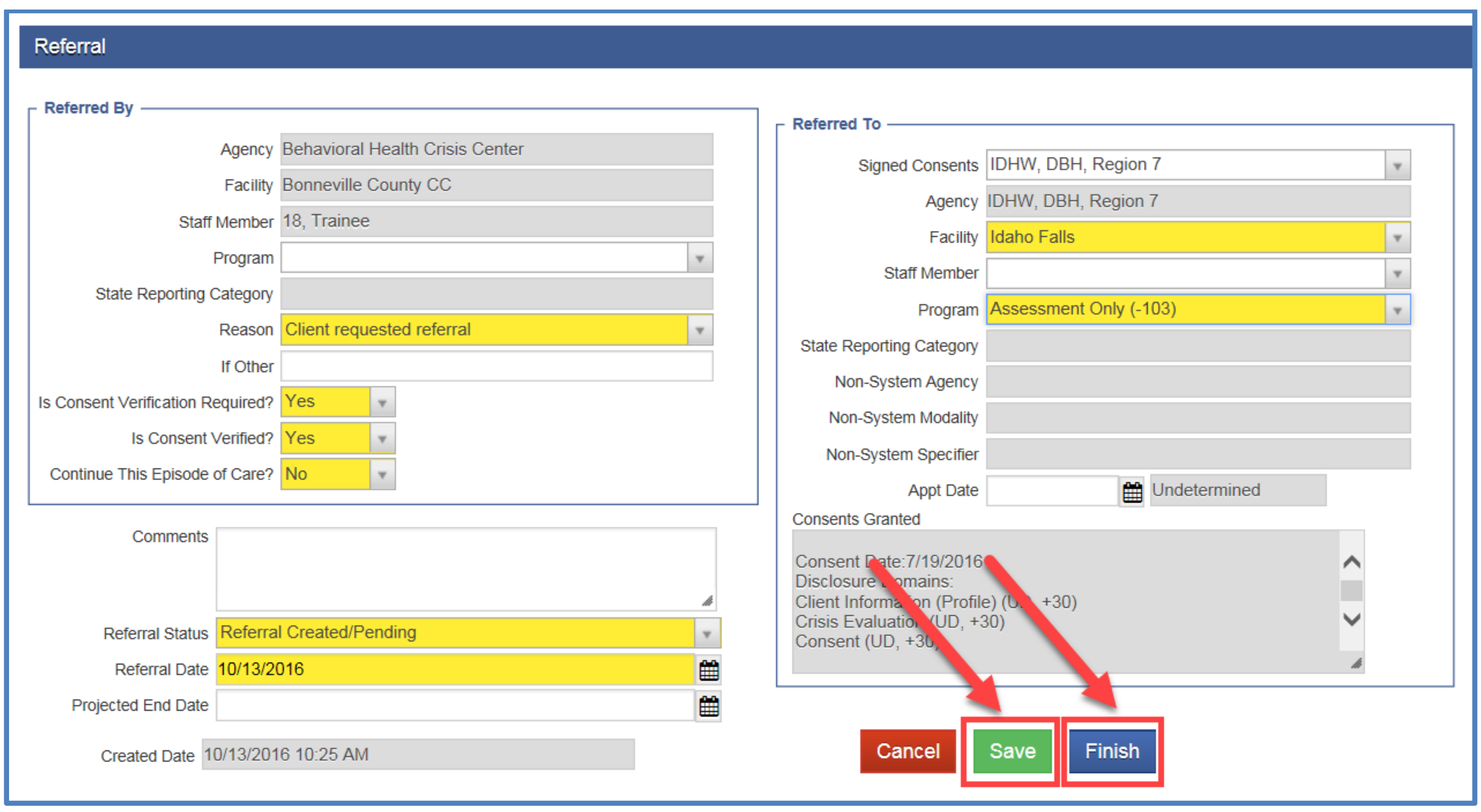
2. Once you're on the Client Activity List, click Referrals on the blue navigation pane.



3. Click Add New Client Referral Record.



4. Complete the following fields.
   - Referred By
     - Reason – select the reason for the Referral.
     - Is Consent Verification Required? – select Yes.
     - Is Consent Verified? – select Yes.
     - Continue This Episode of Care? – select No.
     - Referral Status – the field will populate with Referral Created/Pending.
     - Referral Date – the field will populate with today's date. Update as needed.
   - Referred To
     - Signed Consents – the field will populate the agency selected on the consent.
     - Facility – select the facility for the agency.
     - Program – select the program (typically assessment).



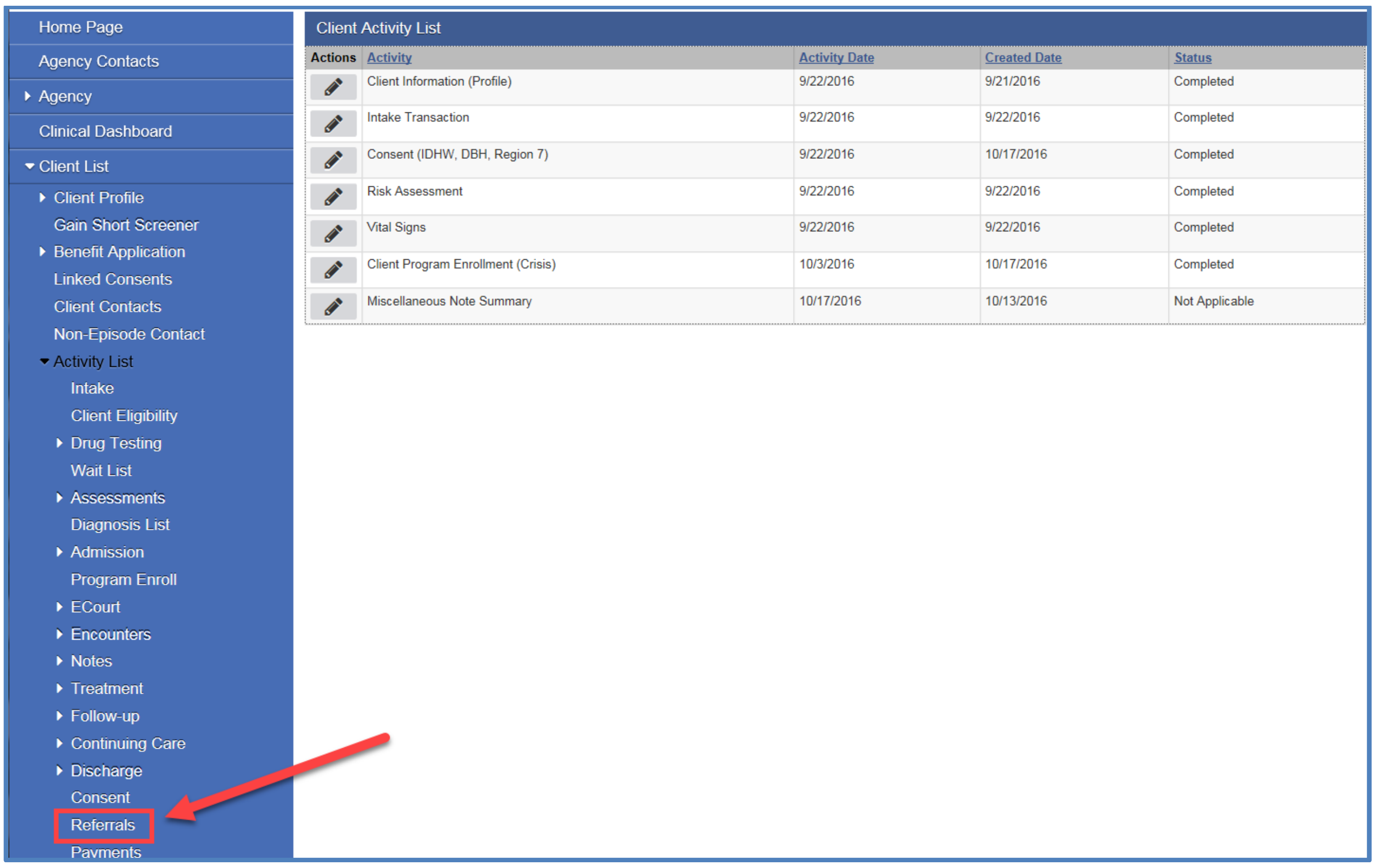
5. Click Save and Finish.

Deleting a Client Referral

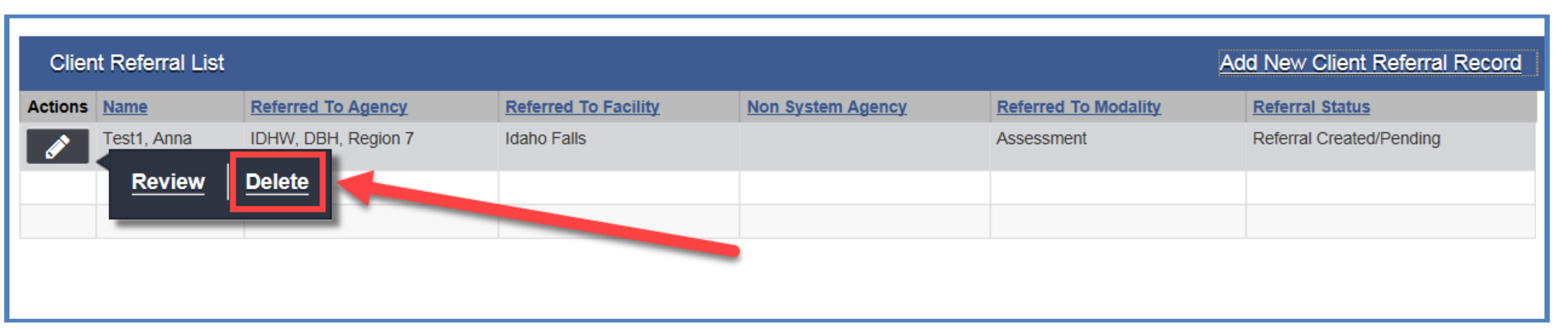
Referrals in WITS are considered a part of the client's official electronic health record (EHR). It is your agencies responsibility to ensure you are adhering to the documentation standards set forth by IDAPA.

Referrals with a Status of Placed/Accepted cannot be deleted.

1. Begin on the Client Activity List.



2. Once you're on the Client Activity List, click Referrals on the blue navigation pane.



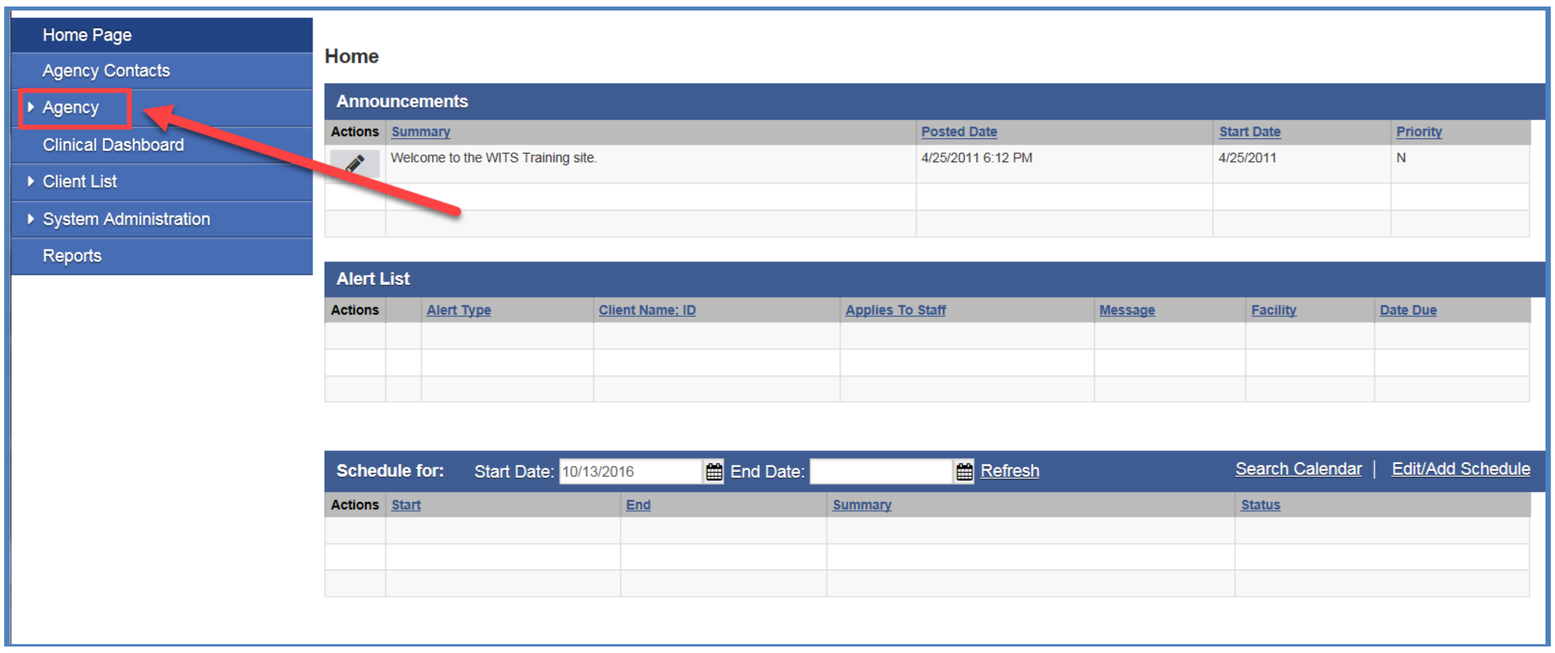
3. The Referral List displays. Hover over the pencil icon and click **Delete** under Actions for the Referral record you want to delete.

4. Click **Yes** to delete the Referral record or click **No** to cancel.

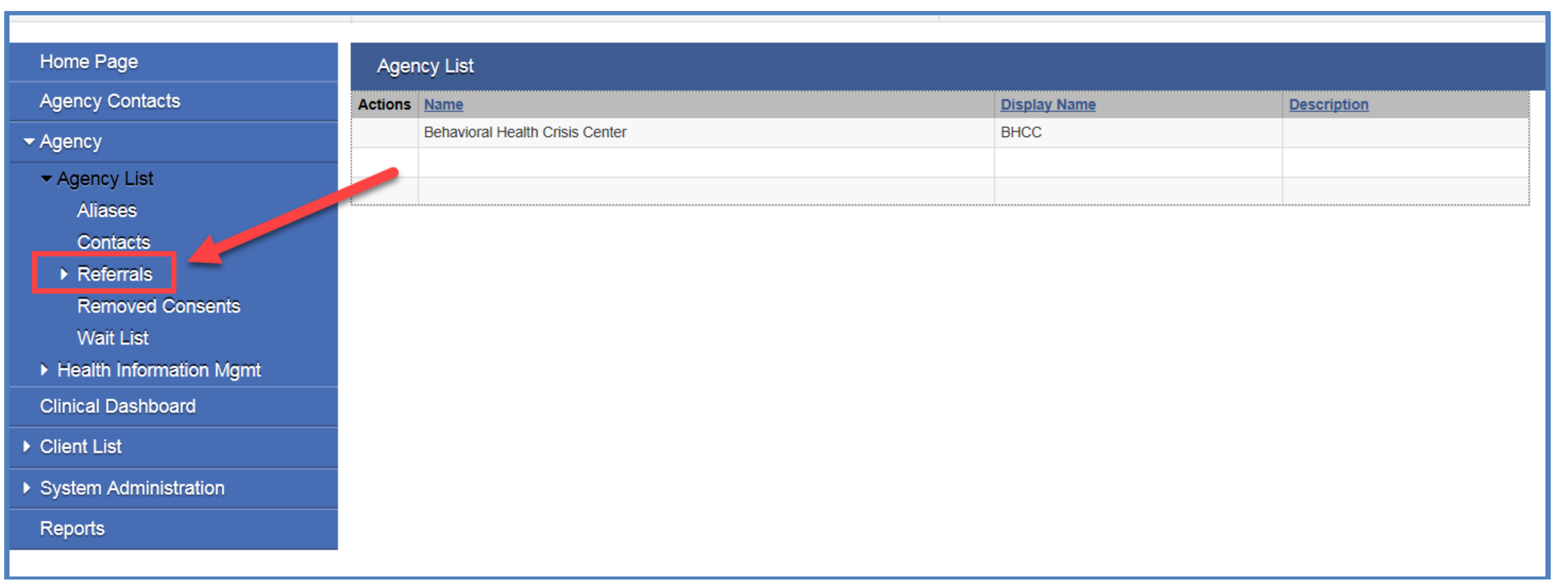
Reviewing the (Referred Out) Client Referrals

You can review the Referrals your agency has created from the Referrals Out page.

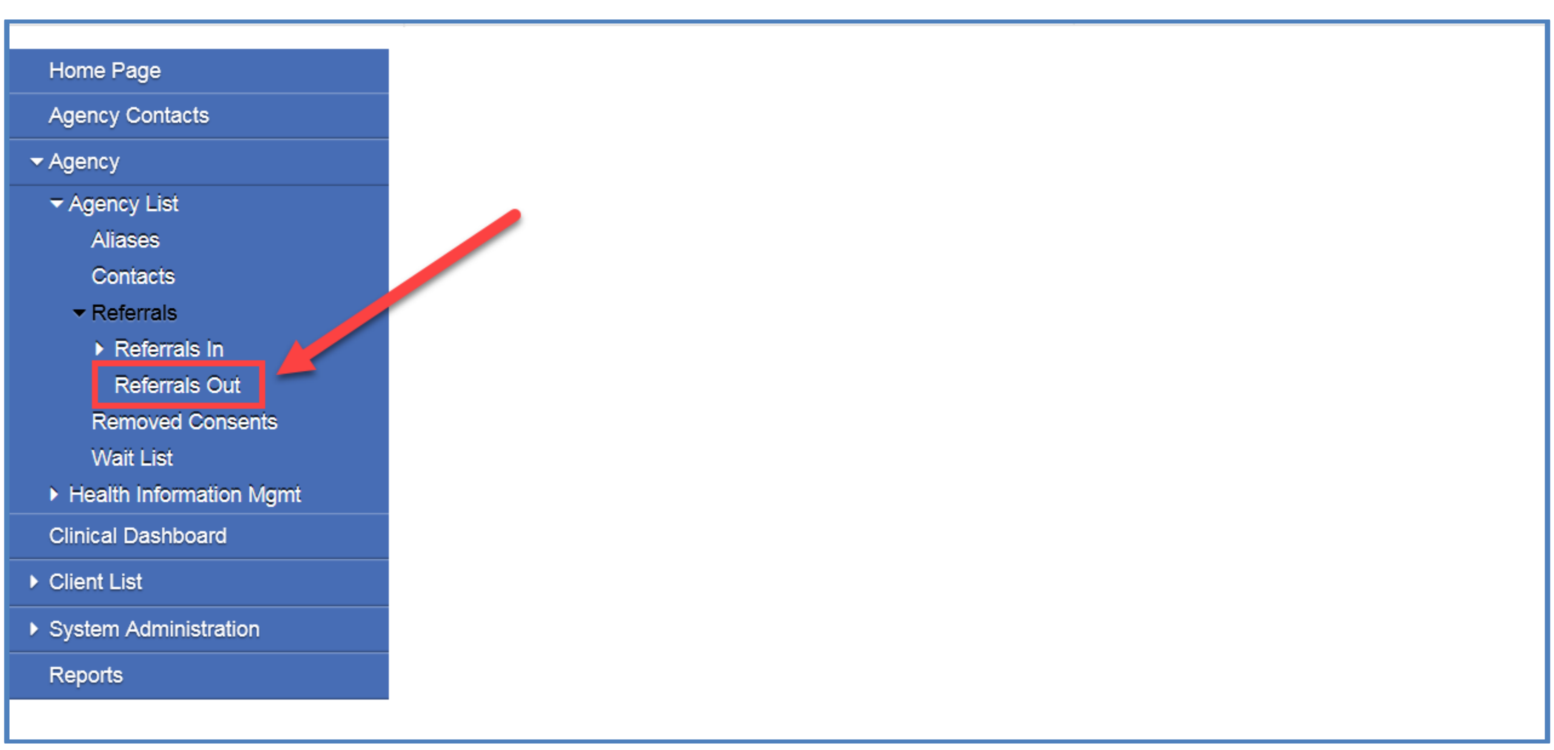
1. Begin on the Home Page.



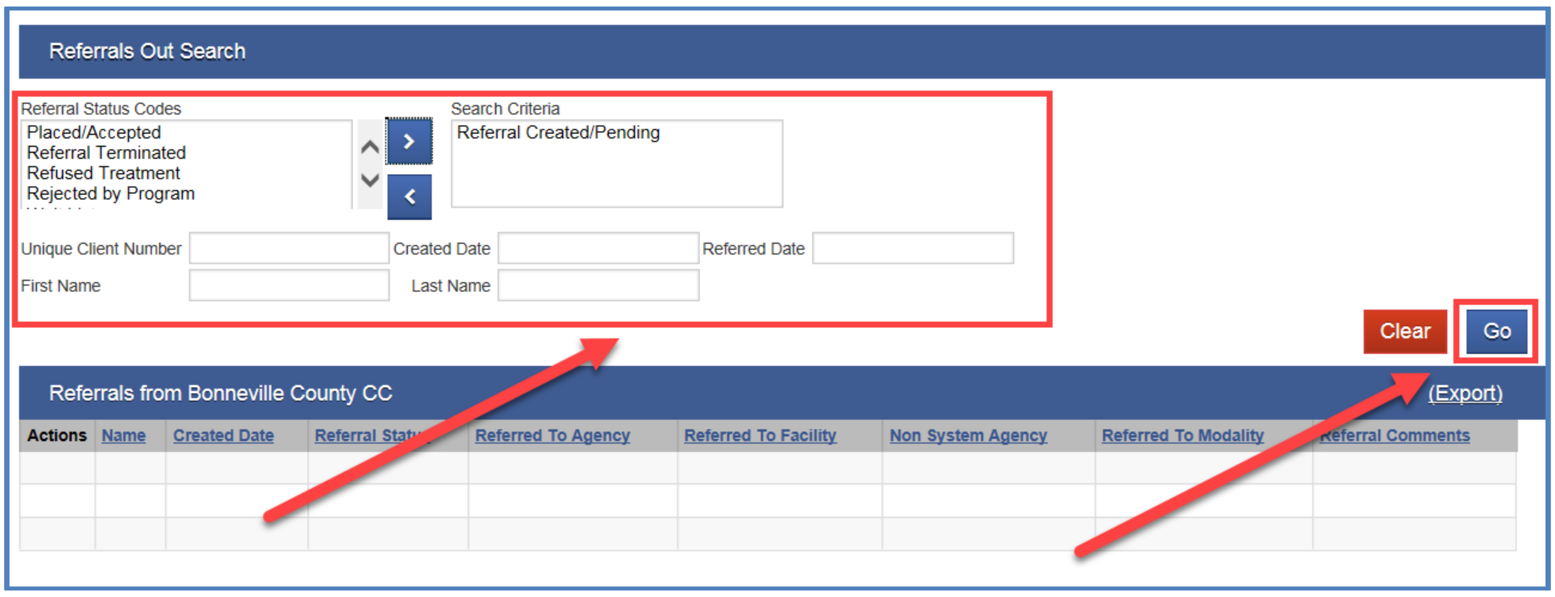
2. Click Agency on the blue navigation pane.



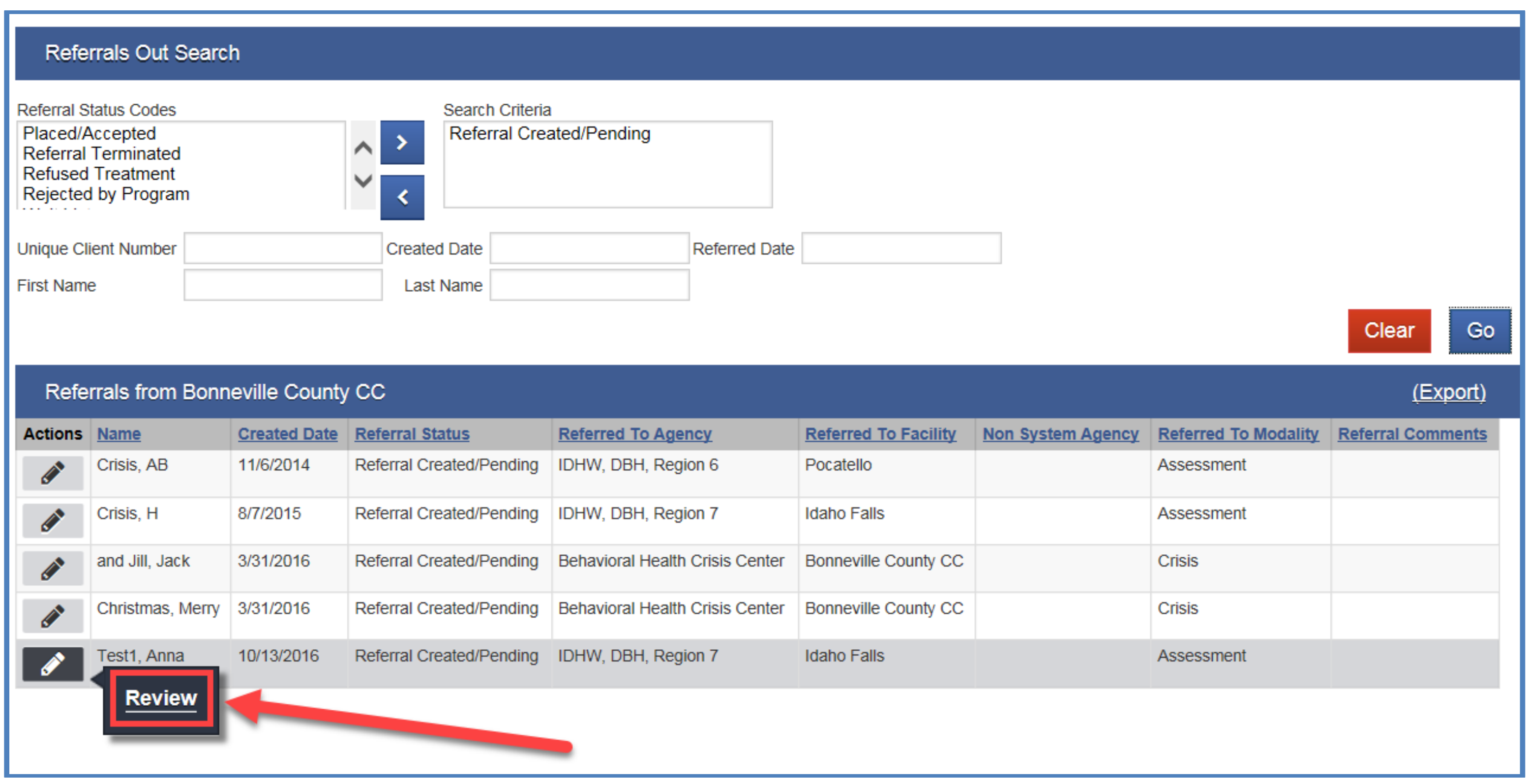
3. Click Referrals on the blue navigation pane.



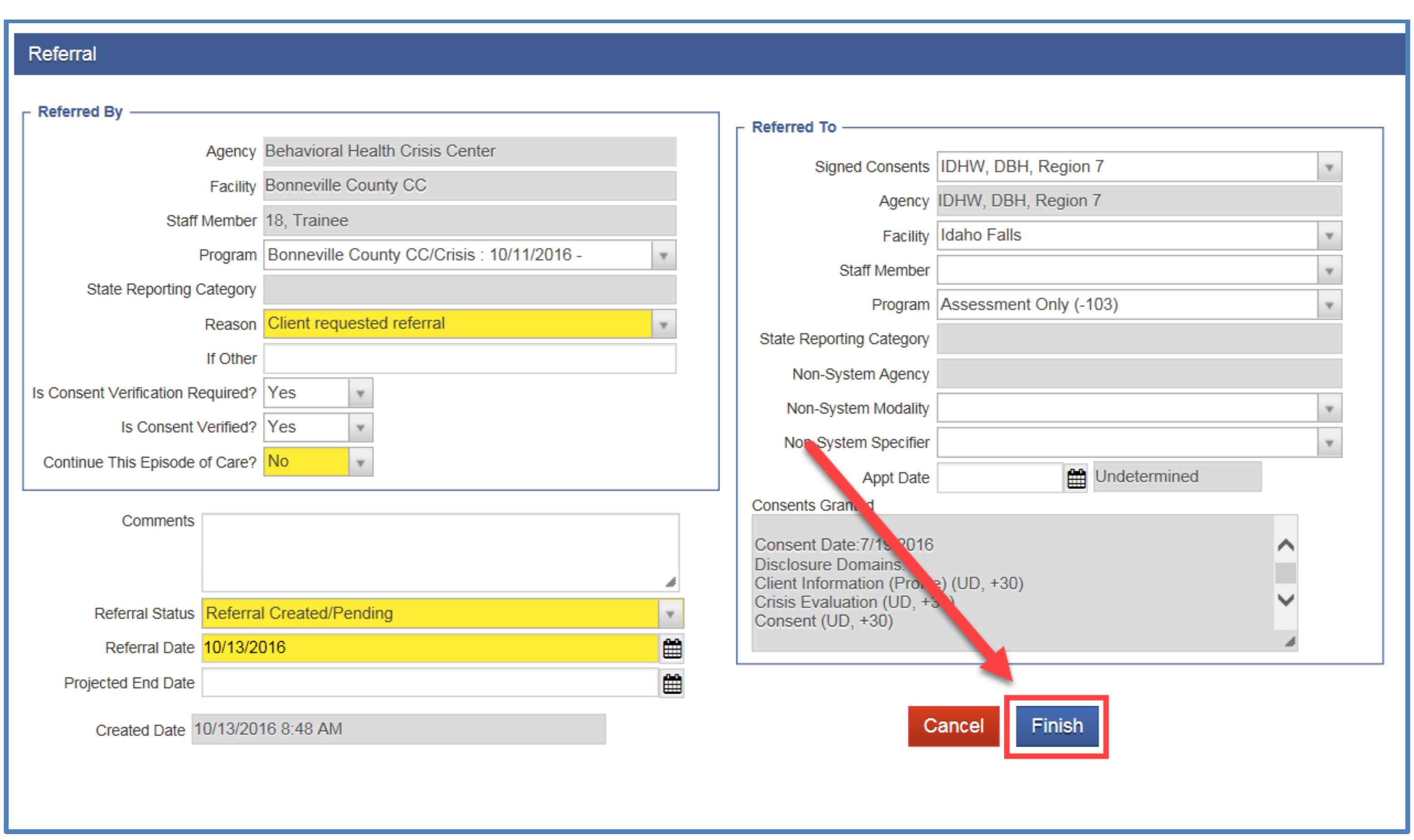
4. Click Referrals Out on the blue navigation pane.



5. Enter the search criteria and click Go.



6. Hover over the pencil icon and click Review under Actions to view a Referral record.



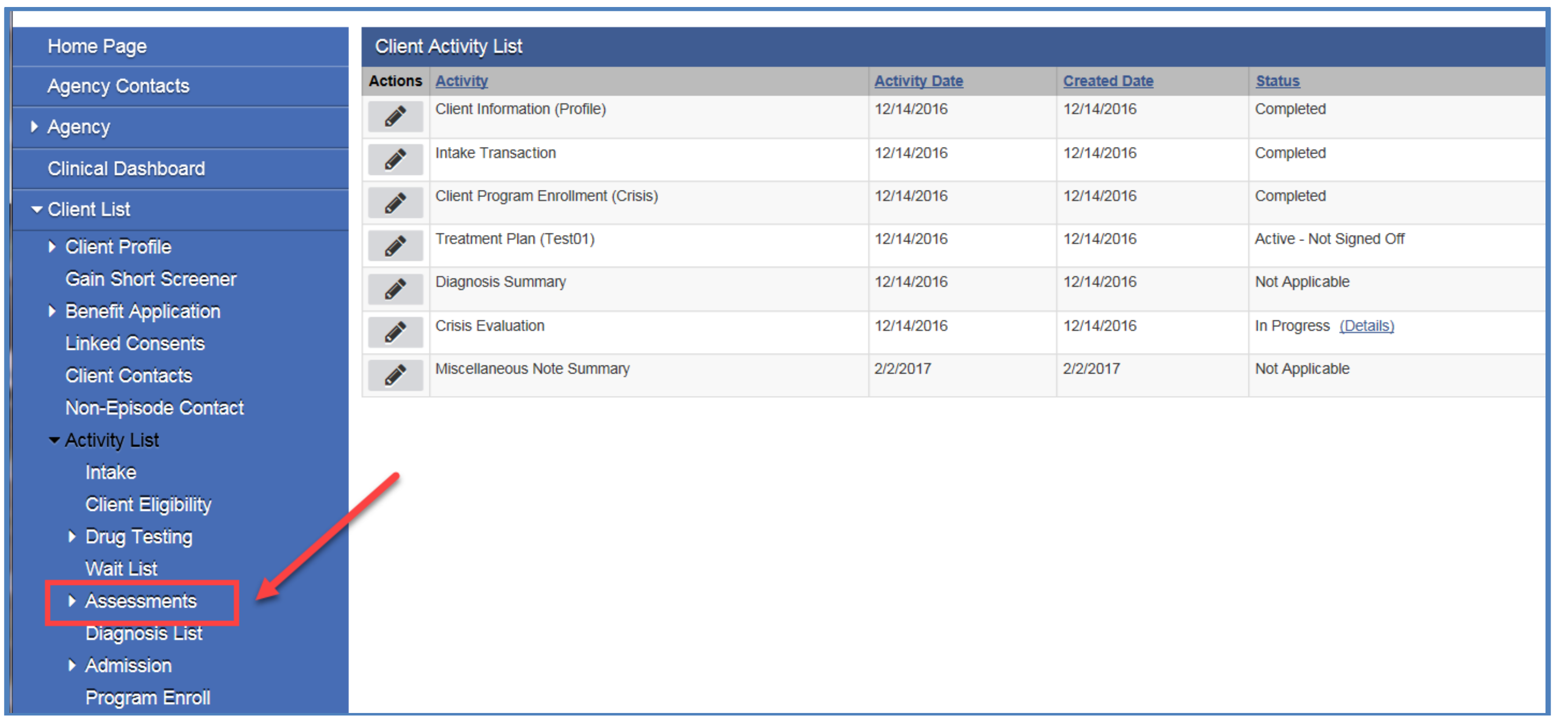
7. The Referral displays. Click Finish.

Risk Assessment

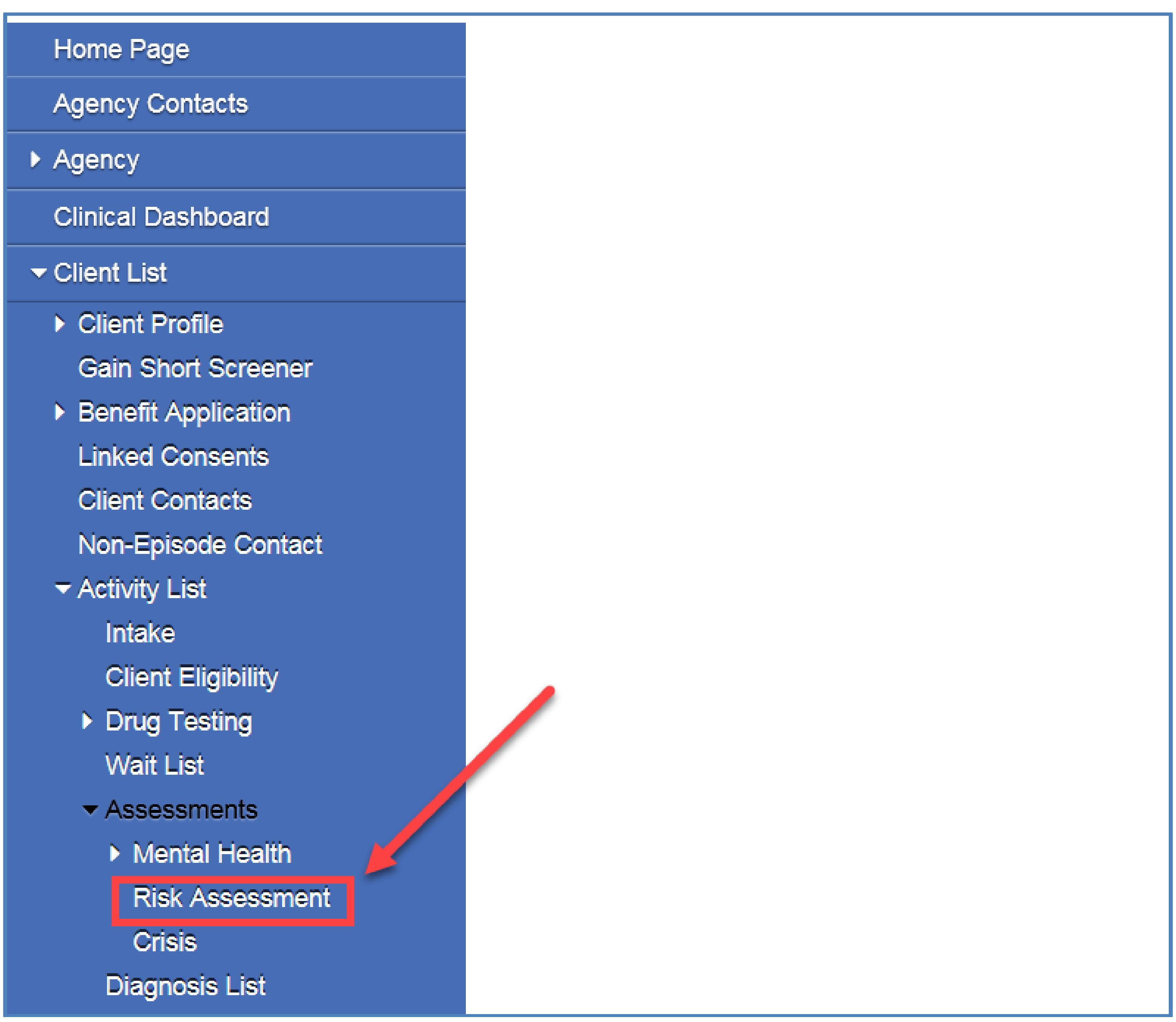
Purpose: The risk assessment captures information about suicide factors of a client.

Creating a Risk Assessment

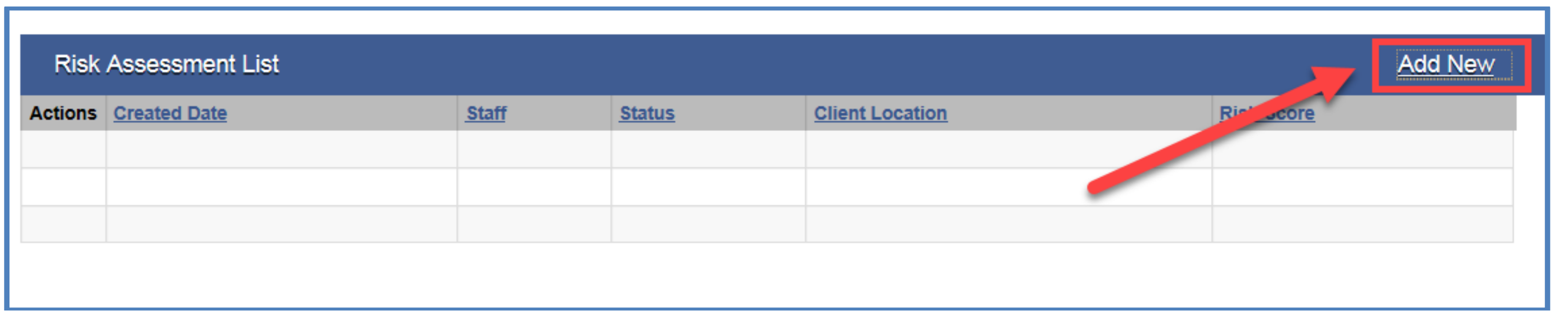
1. Begin on the Client Activity List.



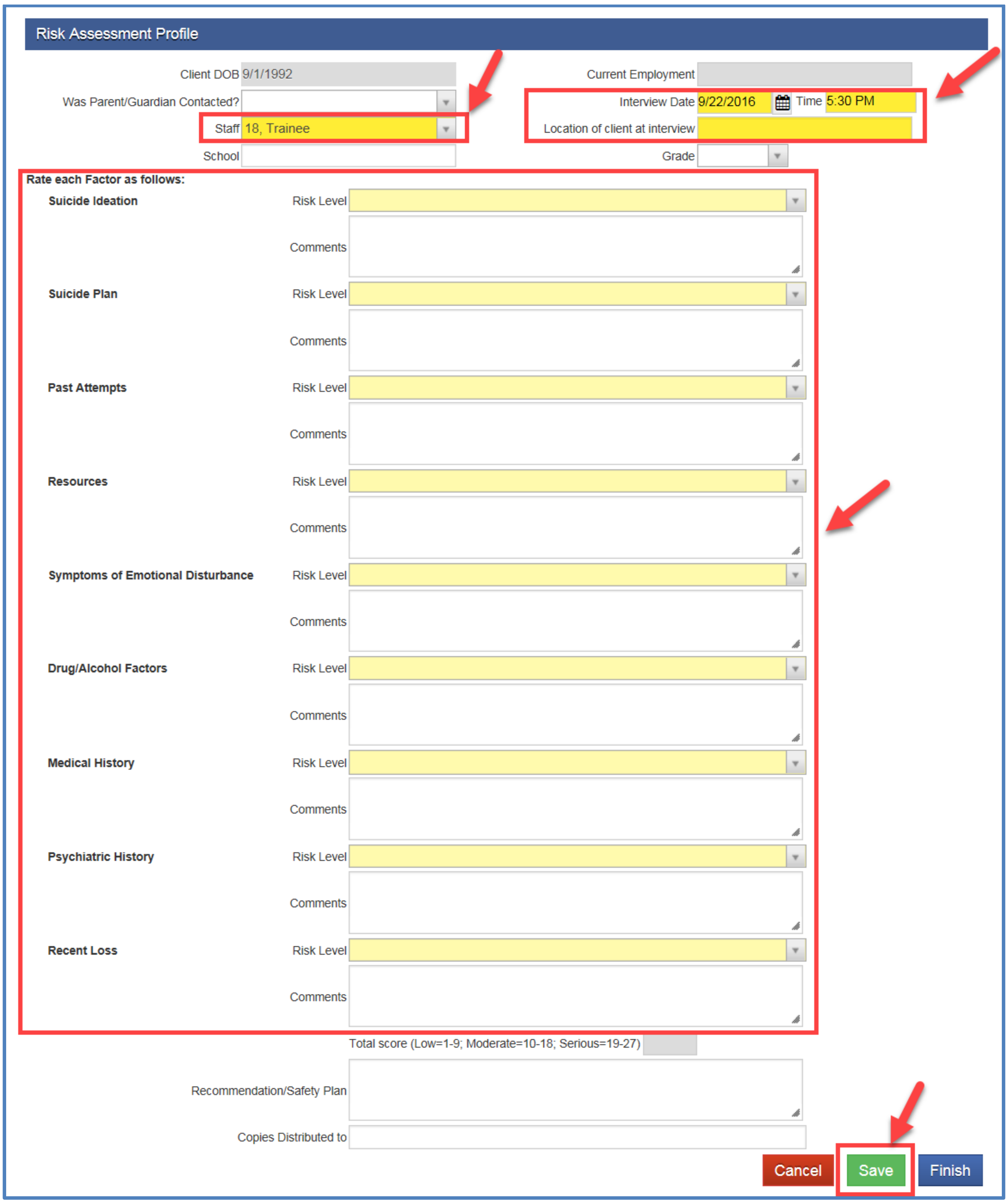
2. Click Assessments on the blue navigation pane.



3. Click Risk Assessment on the blue navigation pane.

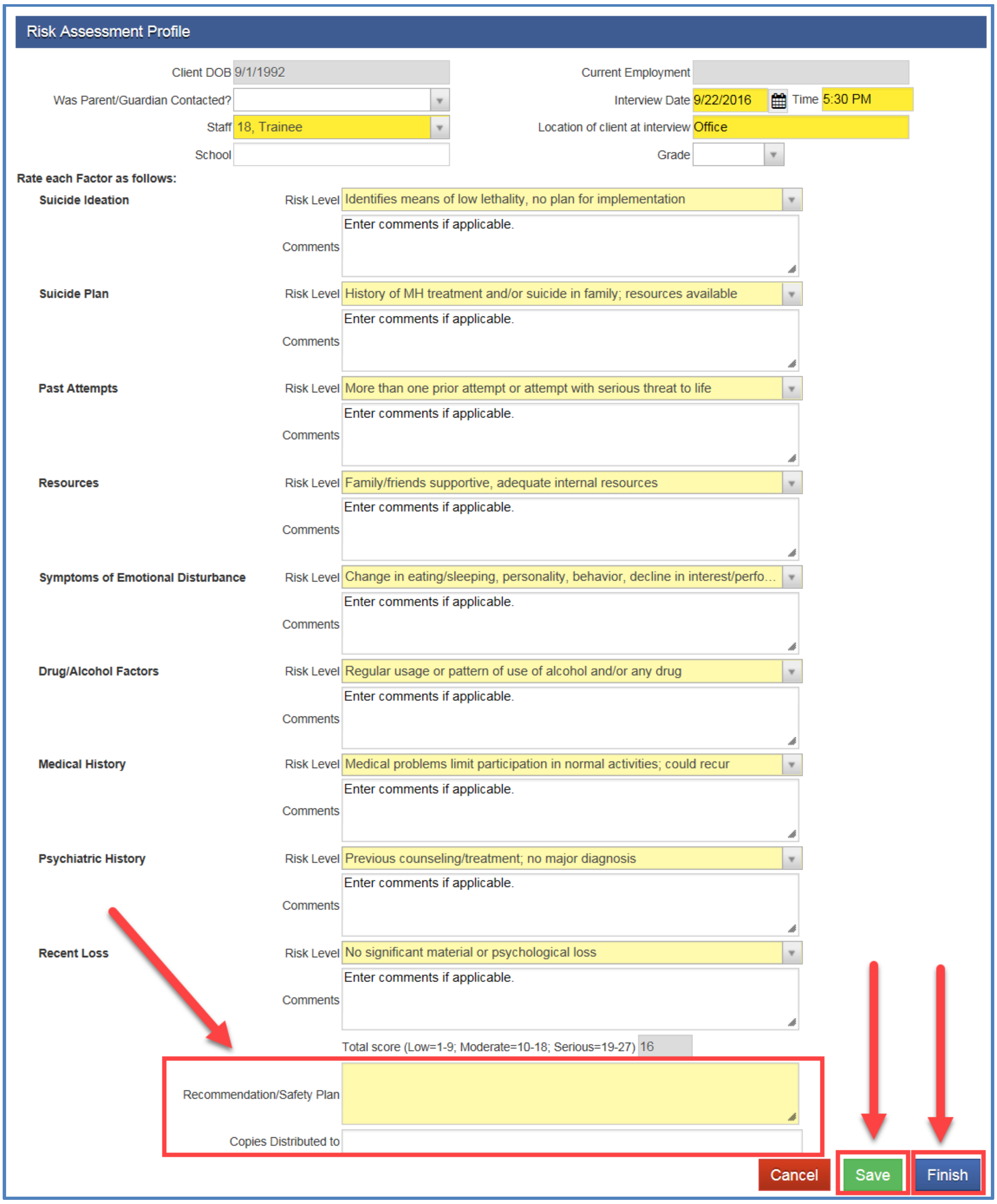


4. Click Add New.



5. Complete the following fields.
    - Interview Date – the field will populate with today's date. Update as needed.
    - Time– the field will populate the time the record was created. Update as needed.
    - Staff – the field will populate the name of the person creating the risk assessment. Update as needed.
    - Location of client at Interview – enter the interview location.
    - Suicide Ideation – select risk level.
        - Comments – enter comments if applicable.
    - Suicide Plan – select risk level.
        - Comments – enter comments if applicable.
    - Past Attempts – select risk level.
        - Comments – enter comments if applicable.
    - Resources – select risk level.
        - Comments – enter comments if applicable.
    - Symptoms of Emotional Disturbance – select risk level.
        - Comments – enter comments if applicable.
    - Drug/Alcohol Factors – select risk level.
        - Comments – enter comments if applicable.
    - Medical History – select risk level.
        - Comments – enter comments if applicable.
    - Psychiatric History – select risk level.
        - Comments – enter comments if applicable.
    - Recent Loss – select risk level.
        - Comments – enter comments if applicable.

6. Click Save to generate a score.



7. Complete the following fields.
   - Recommendation/Safety Plan – enter recommendations and or safety plan.
   - Copies Distributed to – enter the names of agencies or persons if applicable.

8. Click Save and Finish.

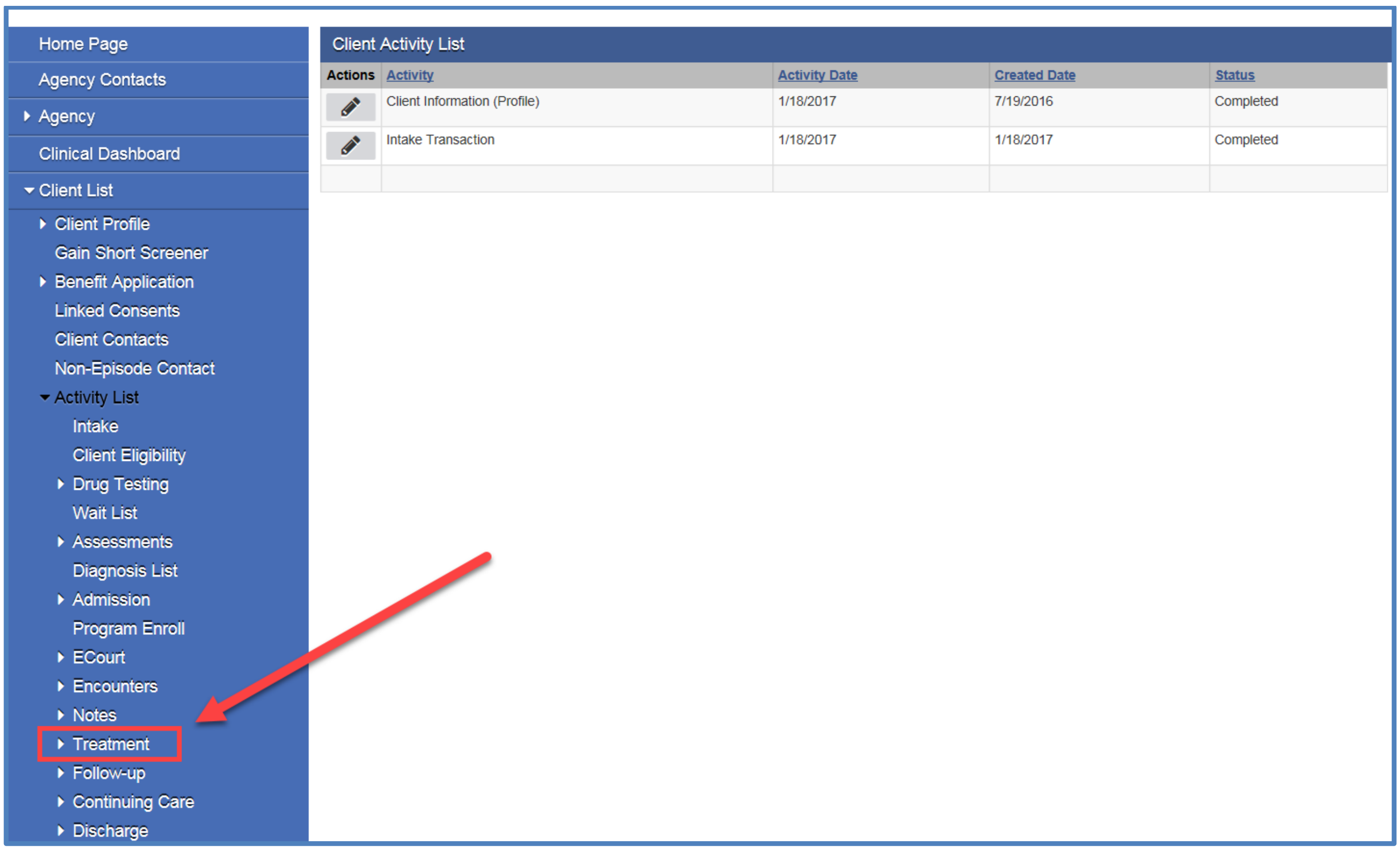
Treatment (After Care) Plan

Once a Treatment Plan is completed and signed in WITS, the plan cannot be changed or edited.

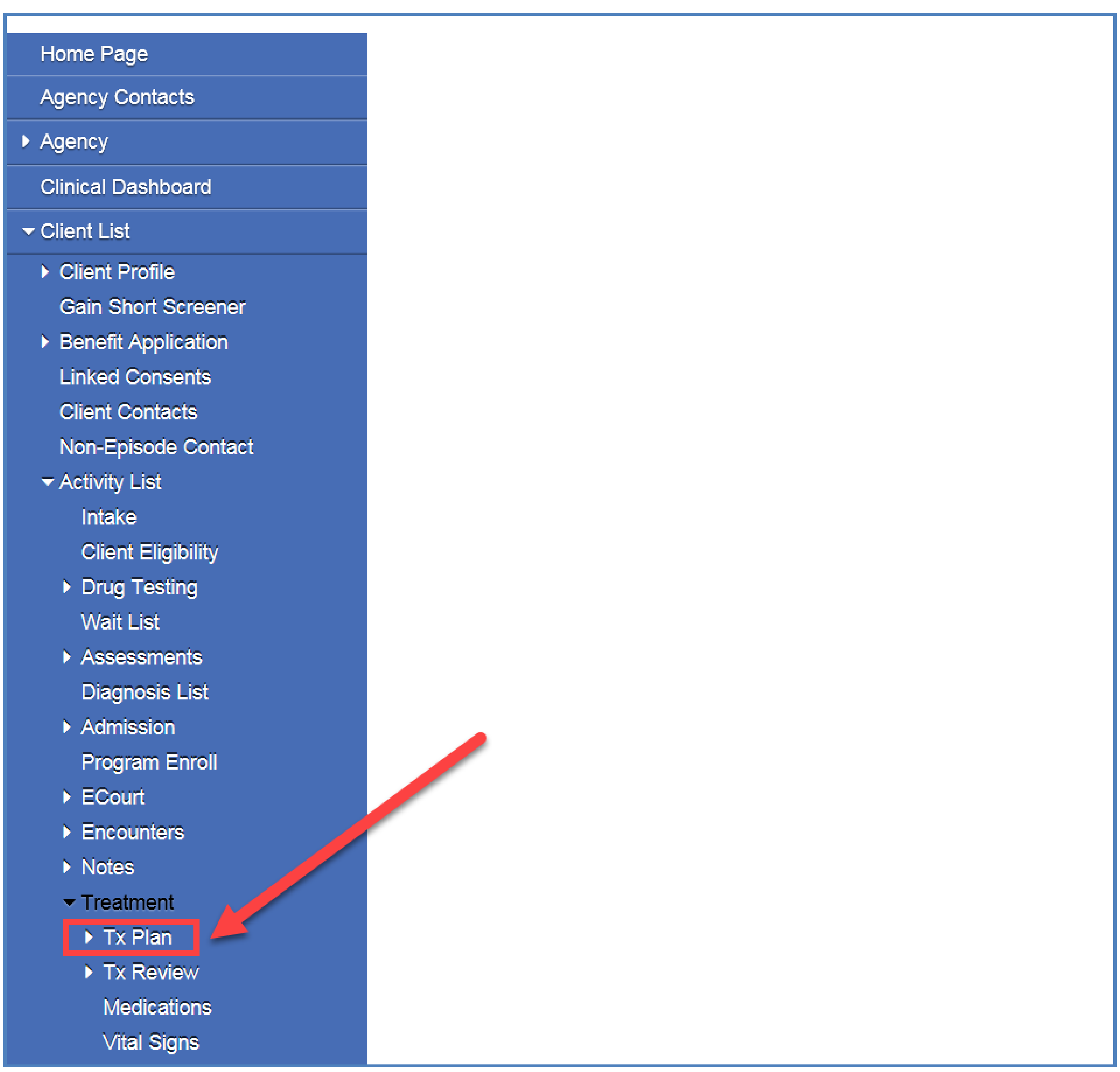
A new or draft Treatment Plan can be recorded at any time. A draft is a copy of the original plan with a new version number. This new version of the Treatment Plan can be modified until it is signed in WITS.

Creating a Treatment (After Care) Plan

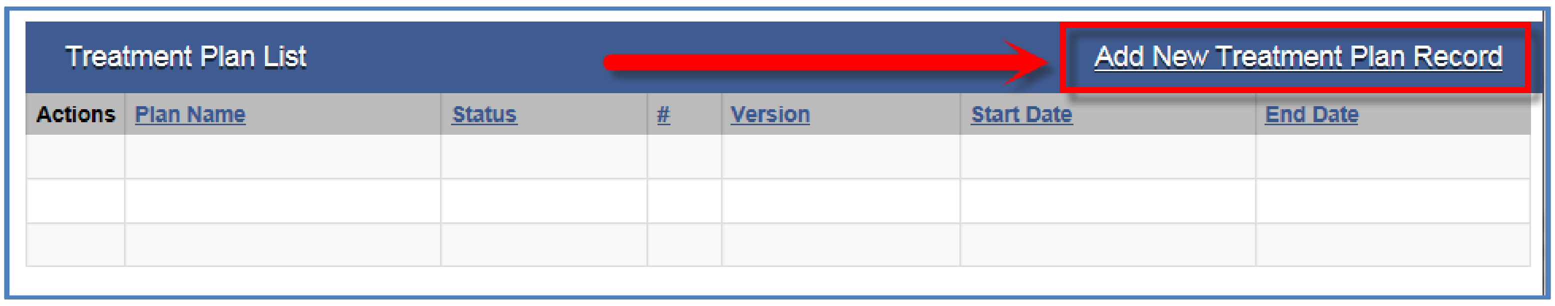
1. Begin on the Client Activity List.



2. Click Treatment on the blue navigation pane.

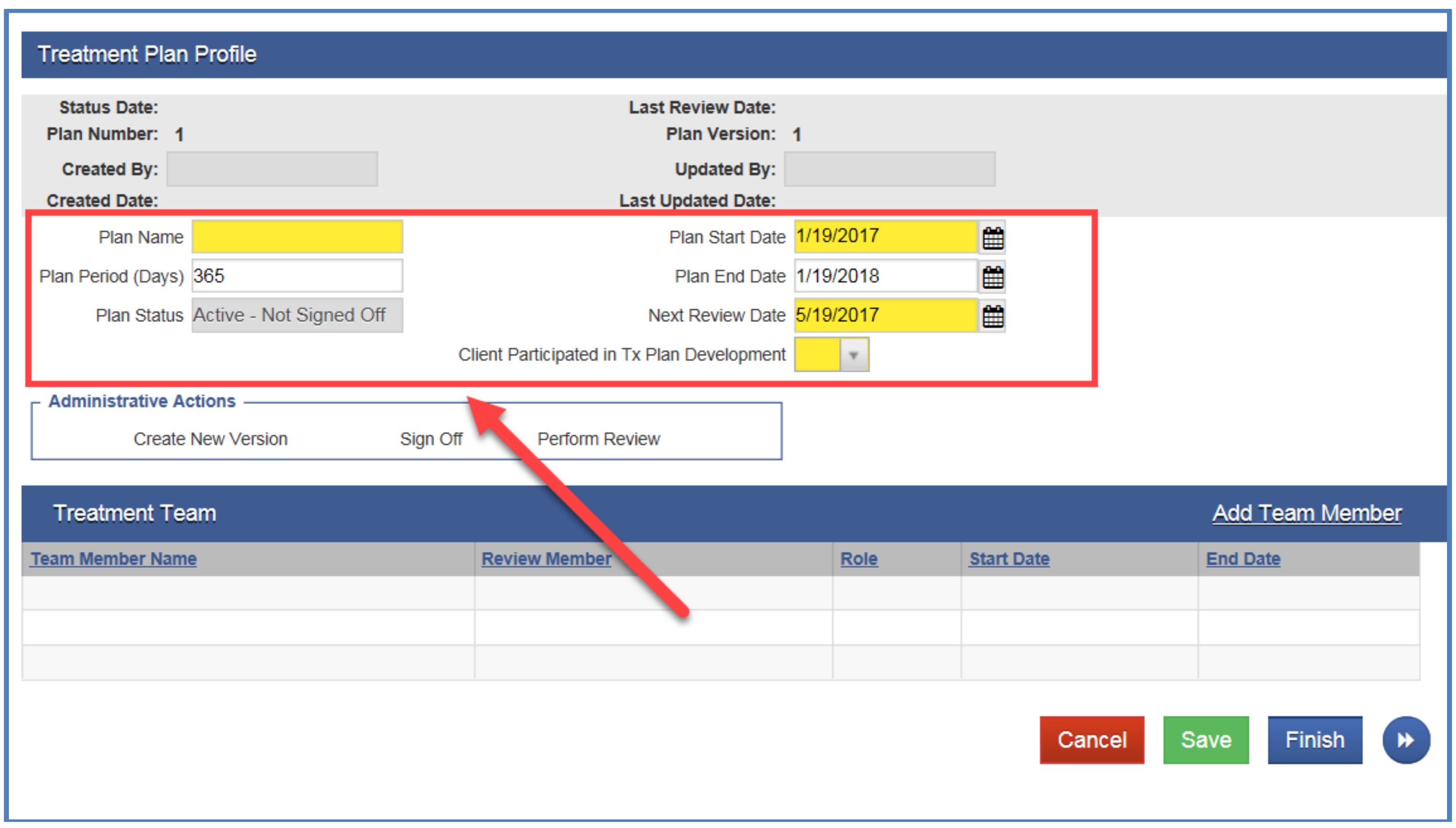


3. Click ▸ Tx Plan on the blue navigation pane.



4. Click Add New Treatment Plan Record on the Treatment Plan List page.

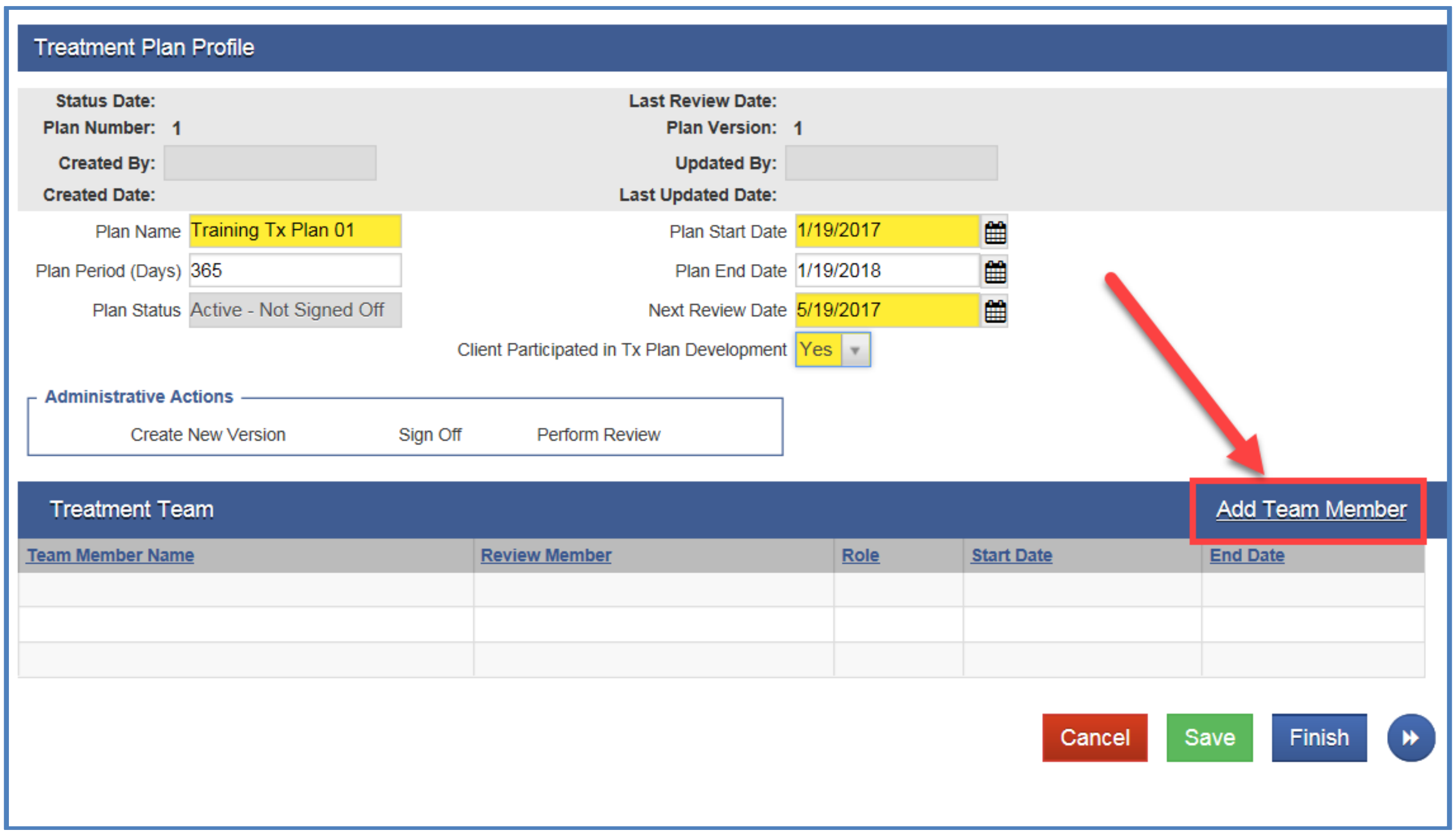
Click Tab after entering the Plan Period (Days) to calculate the Next Review Date.



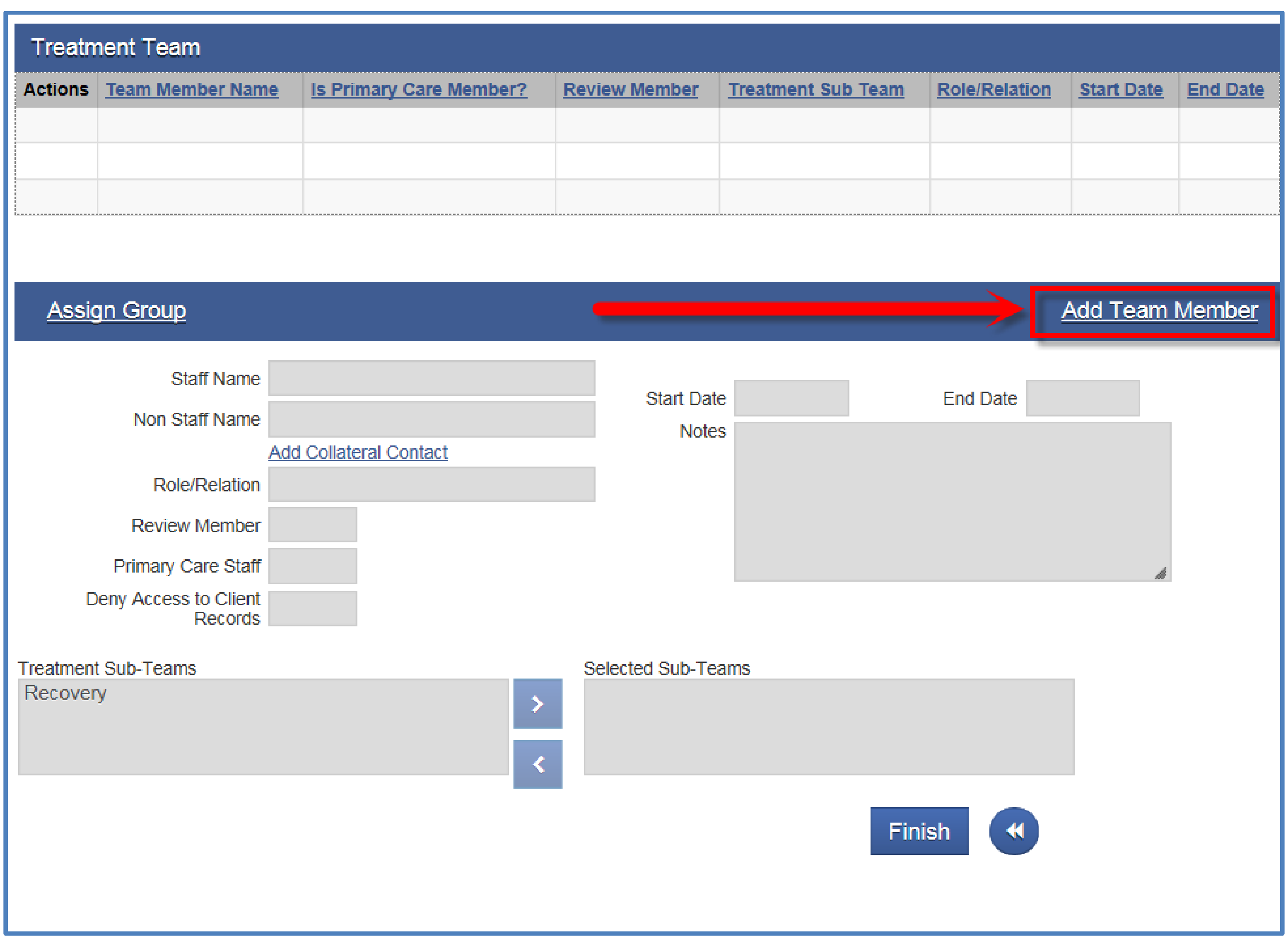
5. Complete the following fields.
   - Plan Name – enter the name of the plan.
   - Plan Start Date – the field will populate with today's date. Update as needed (date the plan expected to be active).
   - Plan Period (Days) – enter the timeframe for the treatment plan and click the Tab key. This will calculate the Next Review Date.
   - Plan End Date – enter the plan end date.
   - Next Review Date –the value is calculated based on the information entered for the Plan Period. Update as needed.
   - Client Participated in TX Plan Development – select Yes or No to document the Client's involvement. If the client does not participate in the Treatment Plan Development, document the reason in the Treatment Plan Overview, Clinical Comments/Recommendations section.

Signature lines for treatment team members will not print on the Treatment Plan paper version unless team members are added electronically in WITS.

Team Members cannot be "deleted" from the list of Team Members. If the individual is no longer an active member of the Treatment Team, the date they ended their involvement will appear in the "End Date" column. The inactive team member's name will display on drop-down menus for the client for one month after the end date.



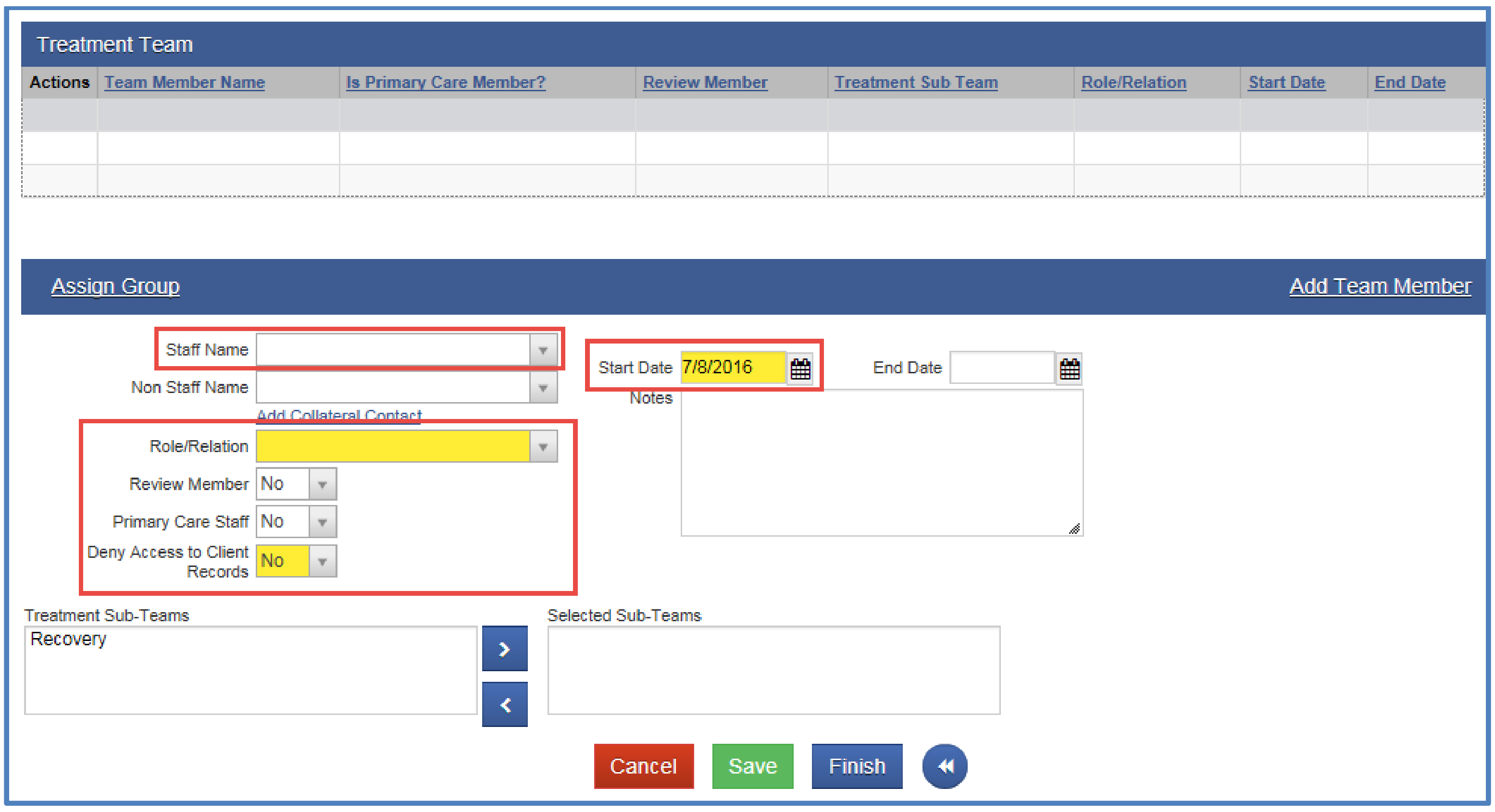
6. Click Add Team Member.



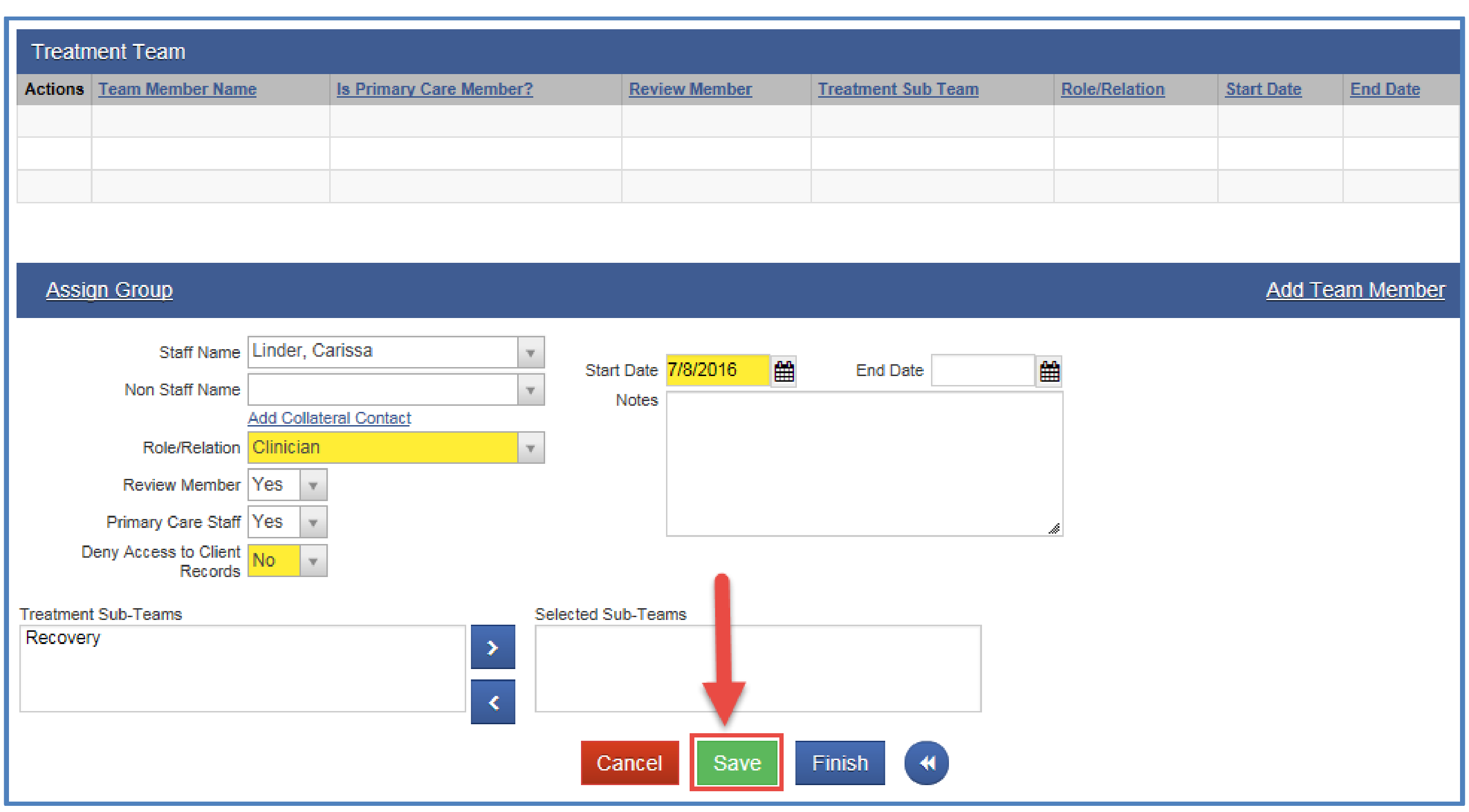
7. Click Add Team Member.

TIPS

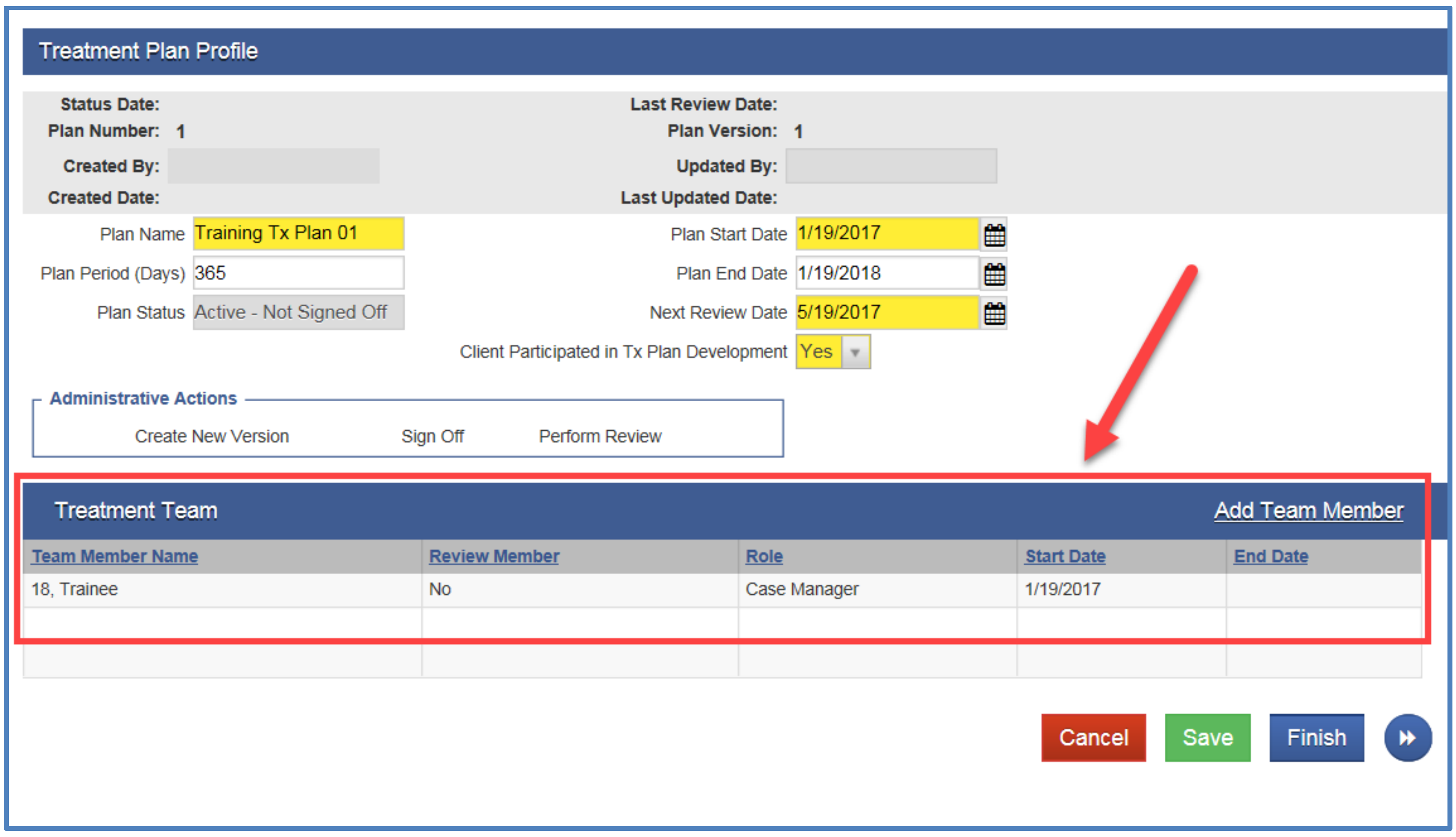
If you need to deny access to a client record for a specific member of your Agency, add them to the Treatment Team, and set ‘Deny Access to Client Records’ to Yes.



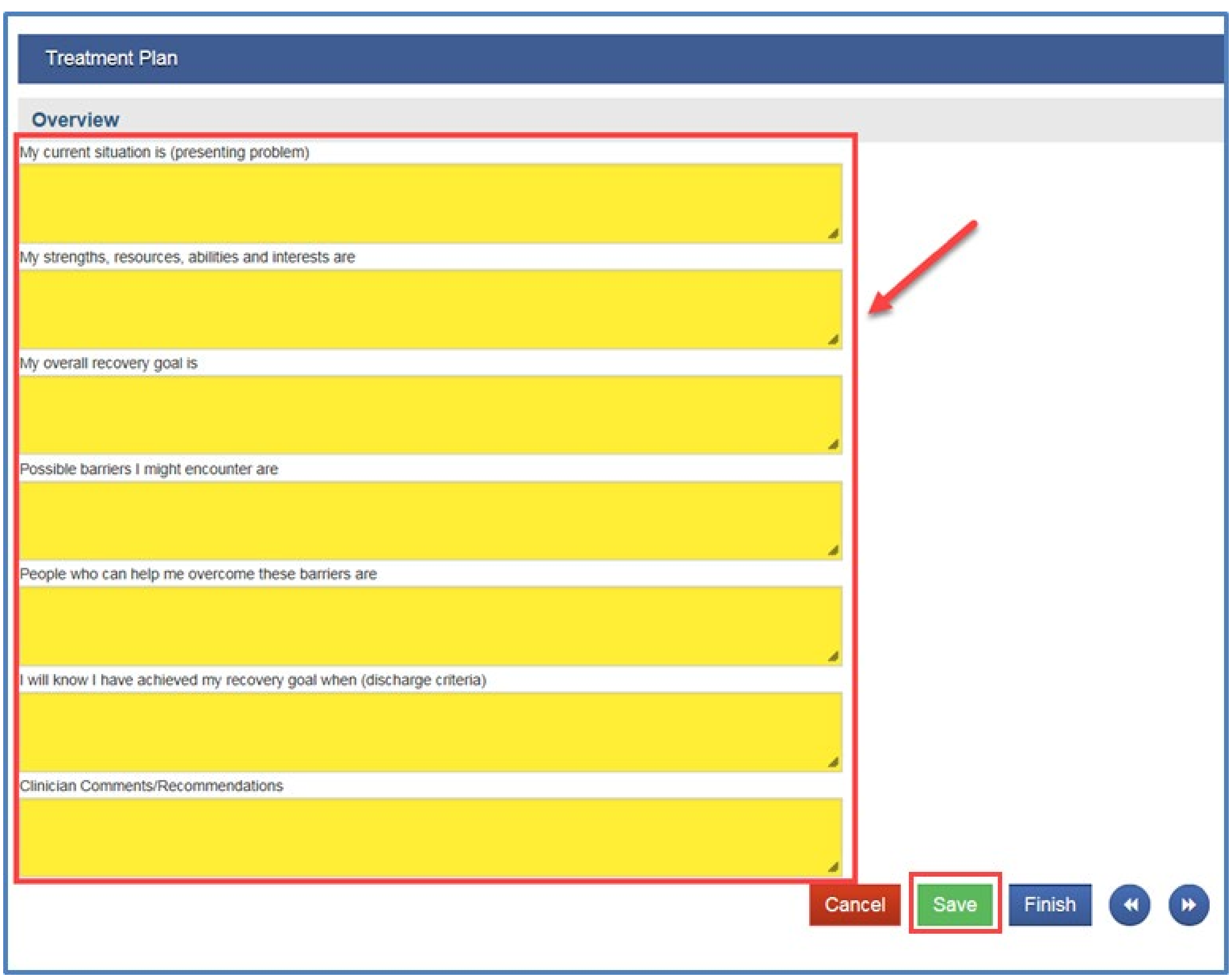
8. Complete the following fields.
   - Staff Name – select the staff member's name. Staff members without an end date in their staff profile will display in the drop-down menu.
   - Start Date – enter the start date.
   - Role/Relation – select the role or relation of the Treatment Team Member to the client.
   - Review member –select Yes or No.
   - Primary Care Staff –select Yes or No.
   - Deny Access to Client Records –select Yes or No. **If you select Yes the staff member *<u>will not</u>* be able to view the client.**



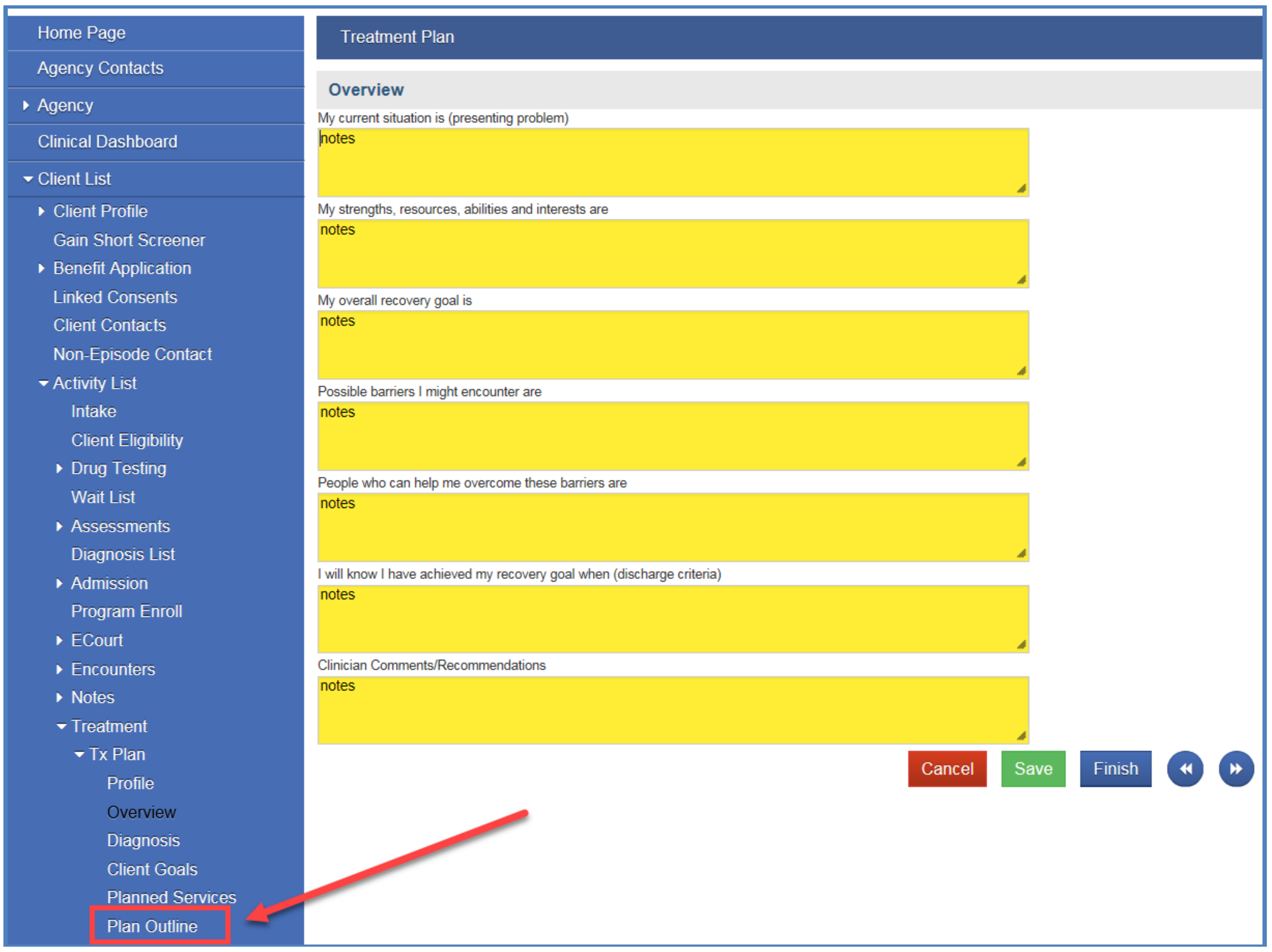
9. Once all the information is entered, click Save. Repeat these steps to add additional team members and click Finish.



10. The Treatment Team Members will populate in the Treatment Team section of the Profile. Click .

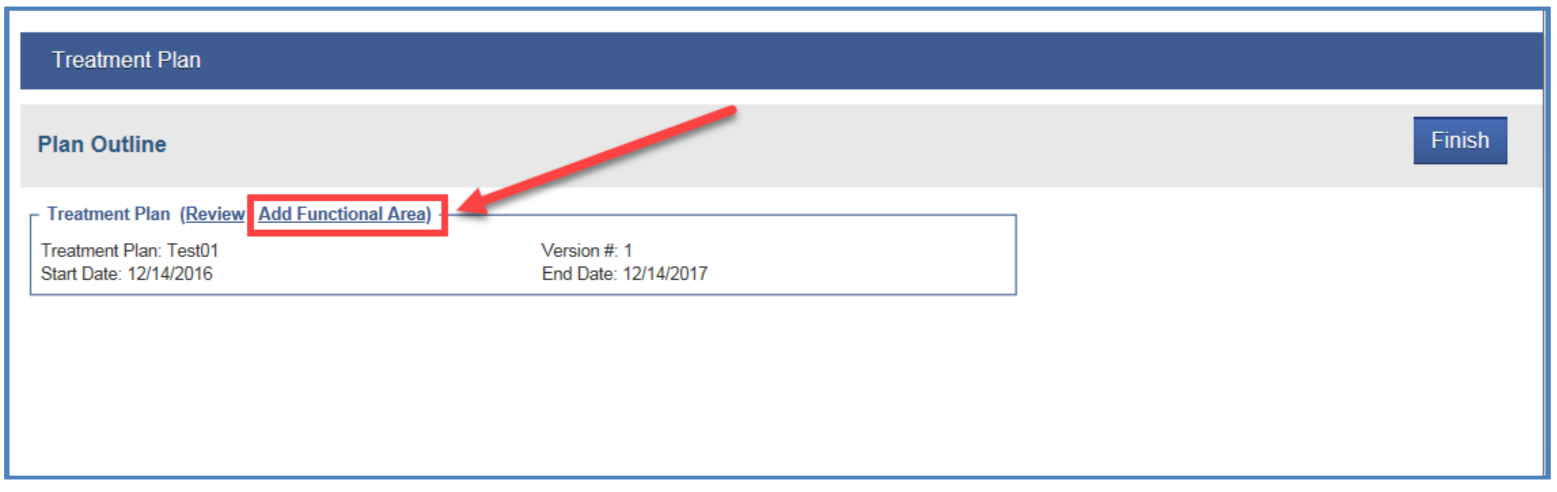


11. Follow the prompts and answer each question. Click Save.

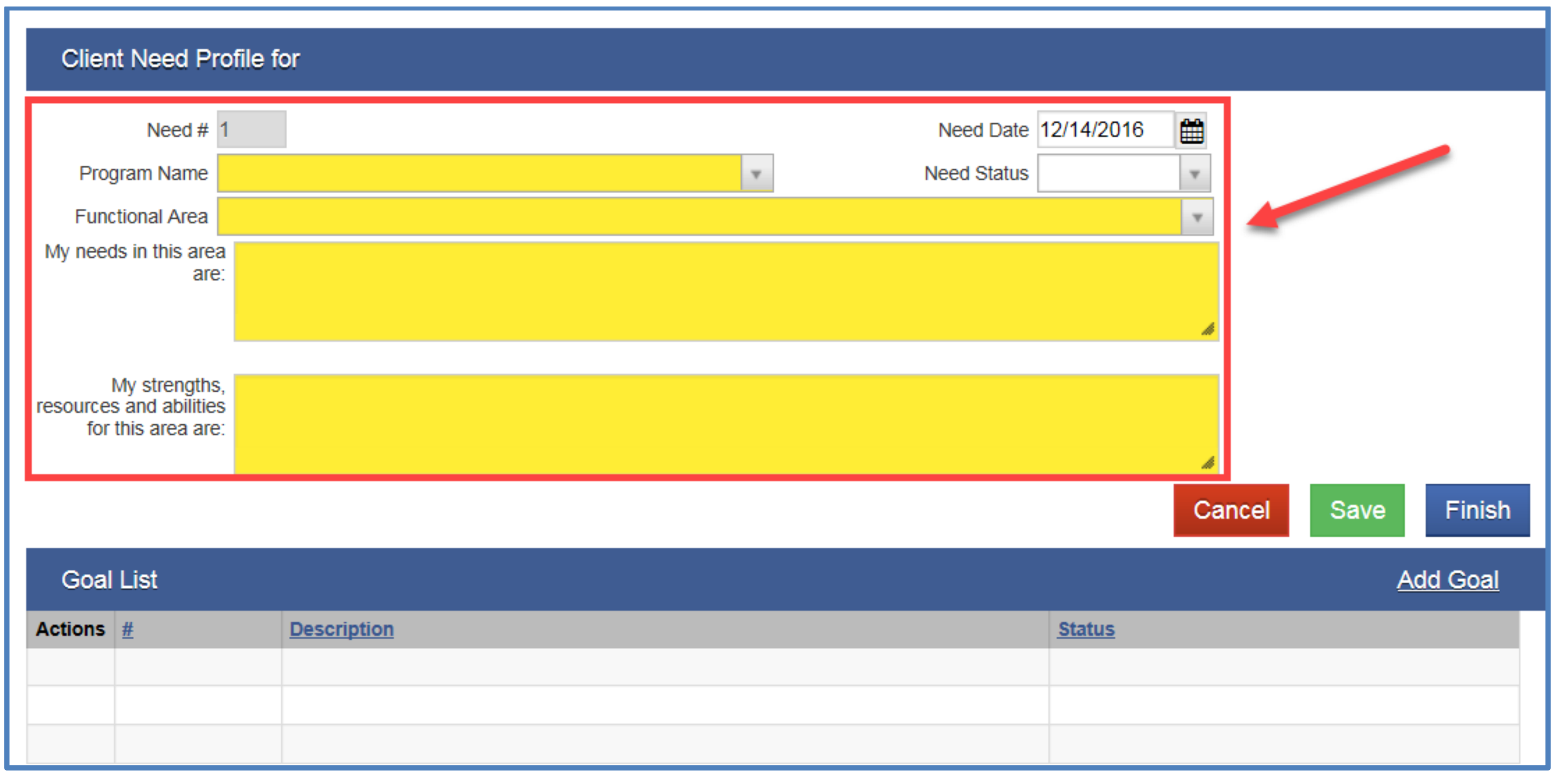


12. Click **Plan Outline** to navigate to the Treatment Plan Outline.

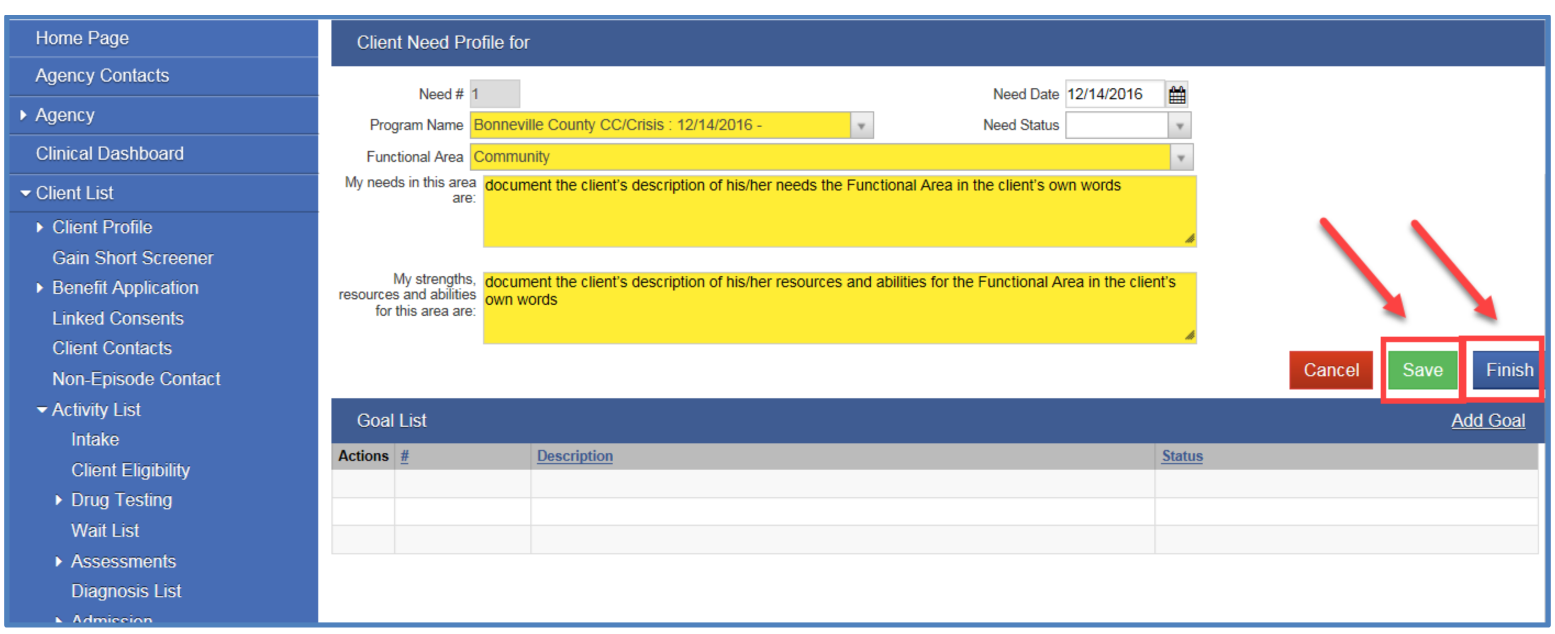
The Treatment Plan Outline gives an "at a glance" look at the entire Treatment Plan. Review or delete information previously entered, or add new information to the Treatment Plan on this page.



13. Click **Add Functional Area** to add Needs.



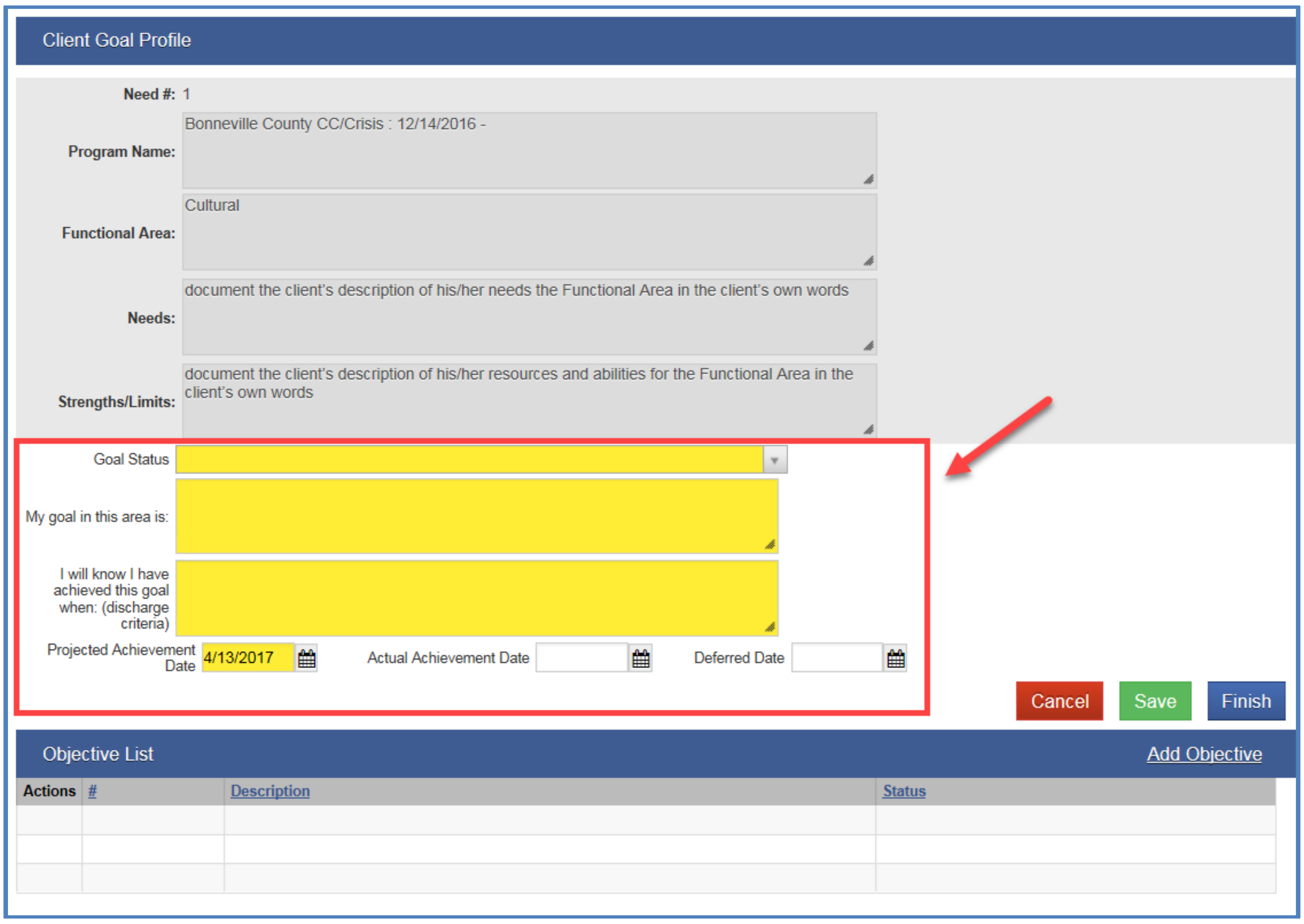
14. Complete the following fields.
    - Need Date – the field will populate with today's date. Update as needed.
    - Program Name – select the Crisis Program.
    - Functional Area – select the Functional Area.
    - My needs in this area are: – document the client's description of his/her needs.
    - My strengths, resources and abilities for this area are – document the client's description of his/her resources and abilities.



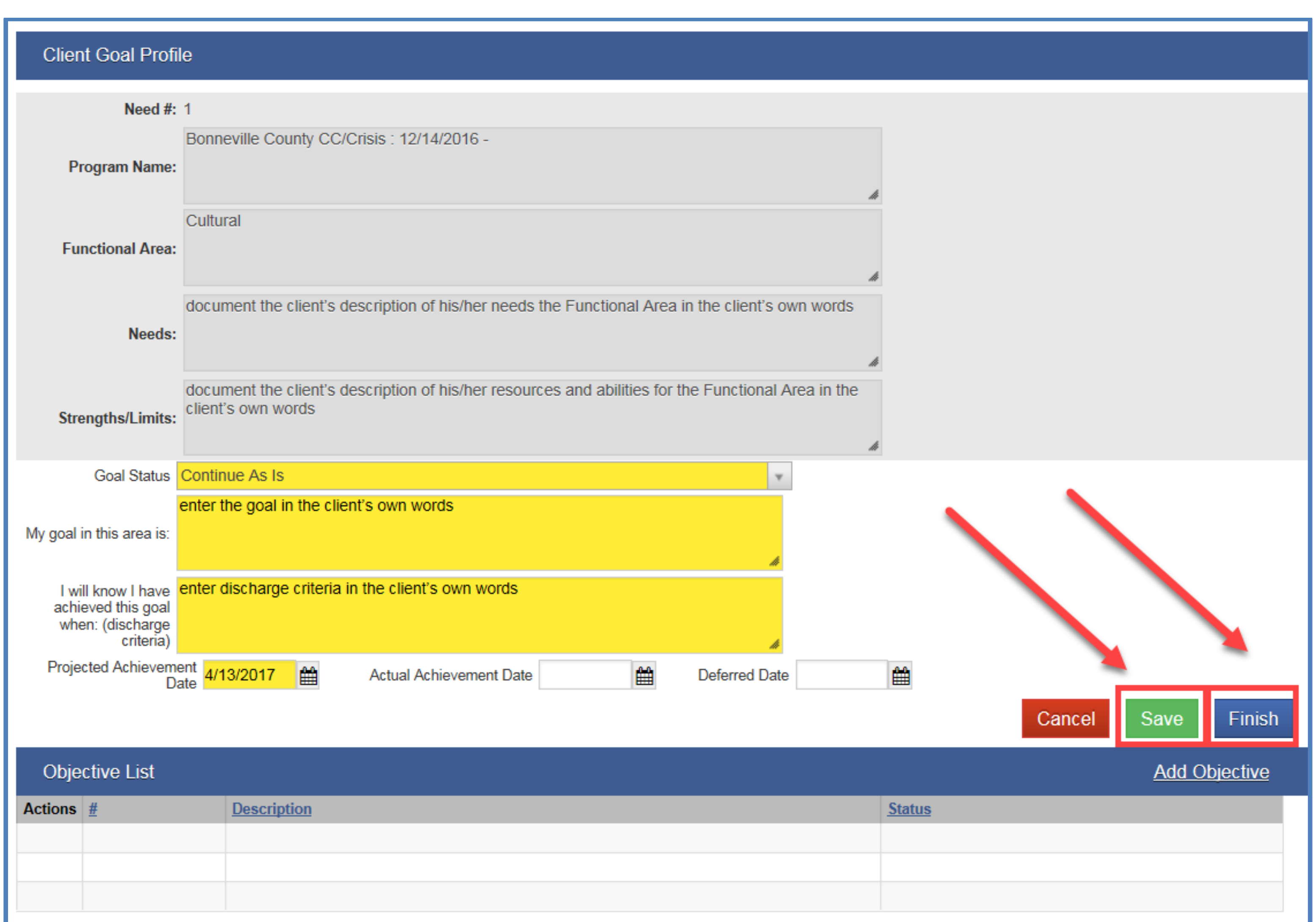
15. Click Save and click Finish to navigate back to the Treatment Plan Outline.

16. Click Add Goal to add Goals.

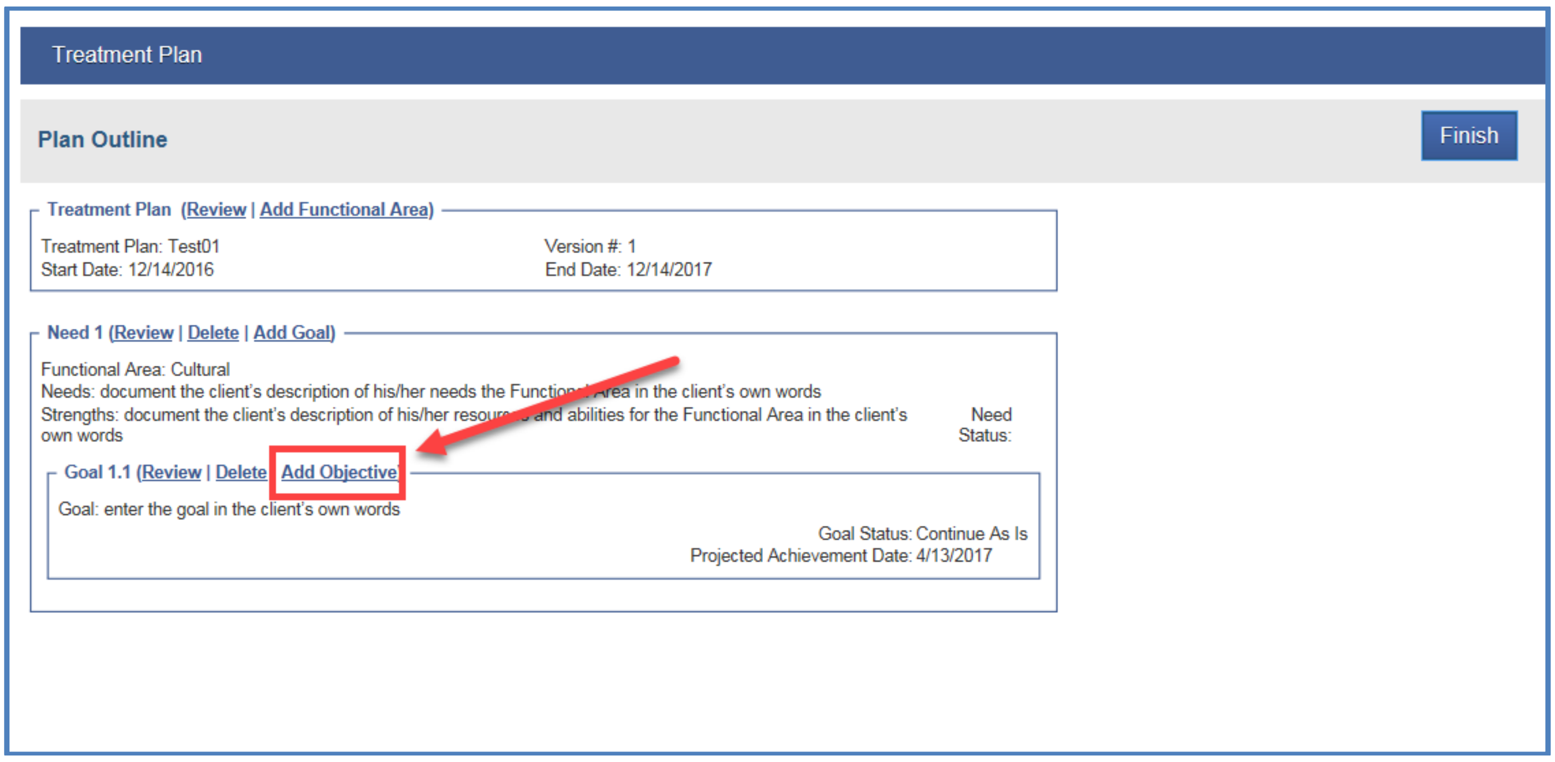
WITS populates the following fields on the Client Goal Profile page as Read Only from the Client Need Profile: Need #, Program Name, Functional Area, Needs, Strengths/Limits.



17. Complete the following fields
    - Goal Status – select the status of the goal.
    - My goal in this area is – enter the goal.
    - I will know I have achieved this goal when– enter the client's description.
    - Projected Achievement Date – enter the projected achievement date.

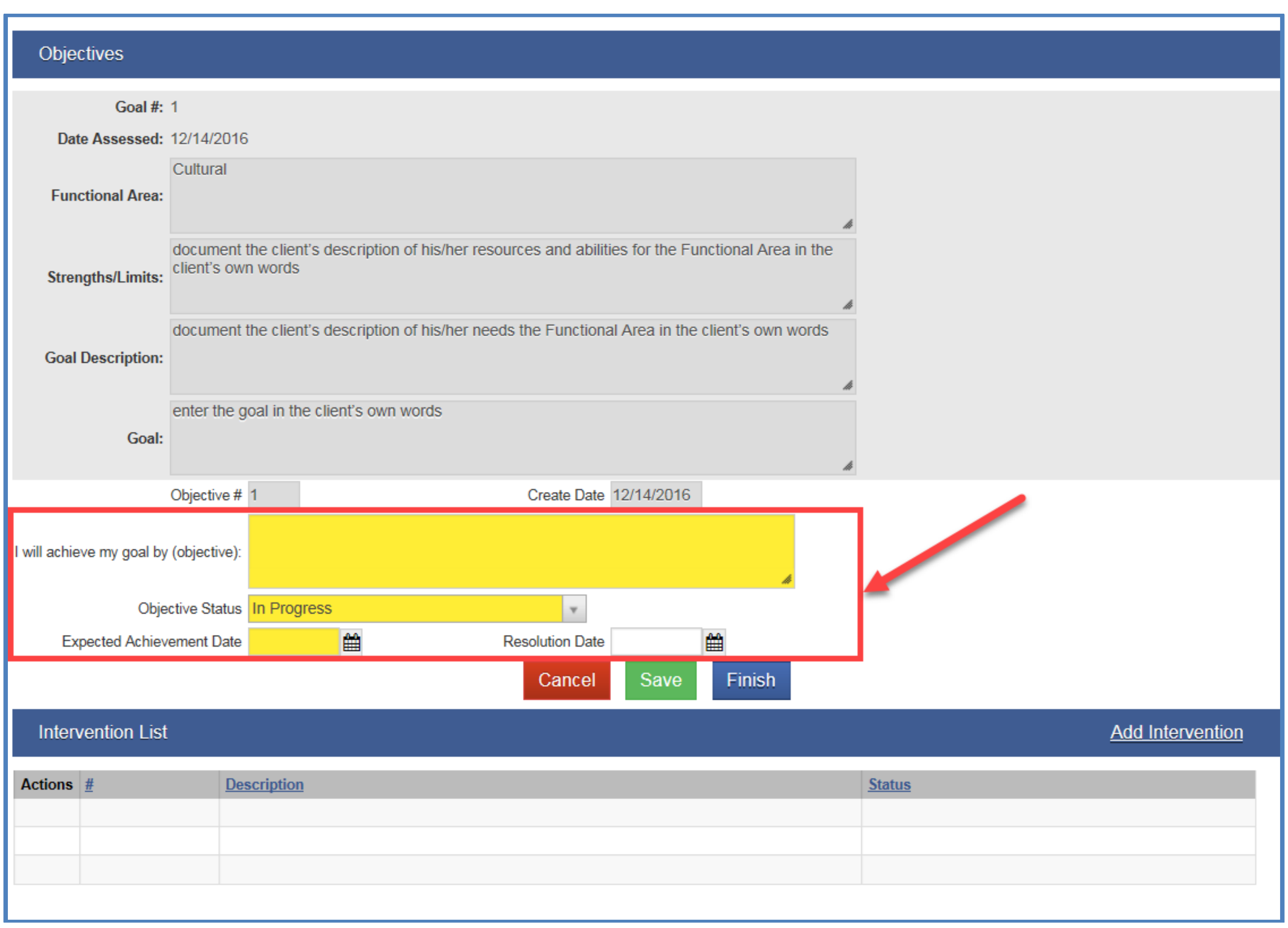


18. Click Save and click Finish to navigate back to the Treatment Plan Outline.



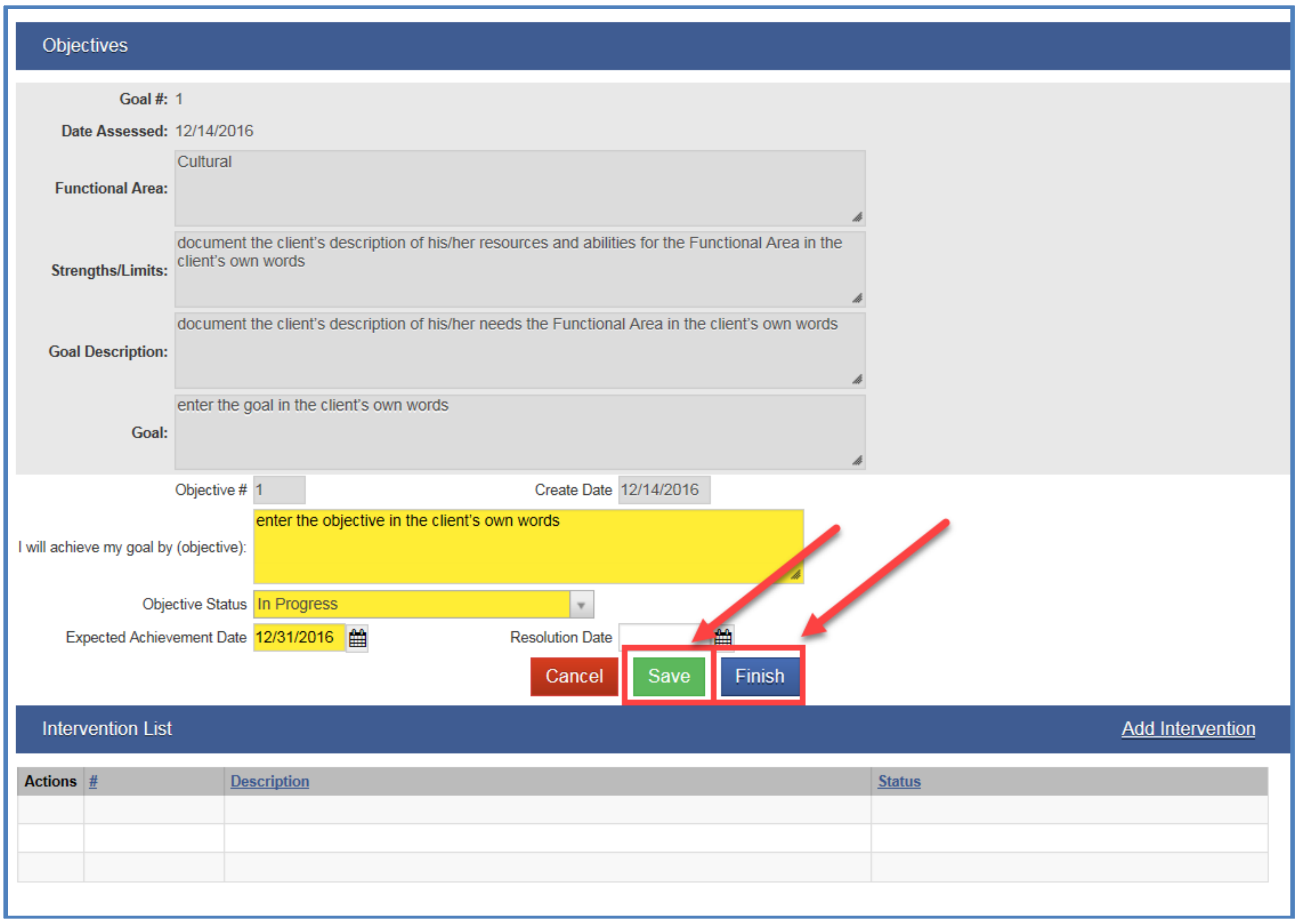
19. Click Add Objective to add objectives to this Goal.

WITS populates the following fields on the Client Objective page as Read Only from the Client Goal Profile: Goal #, Date Assessed, Functional Area, Strengths/Limits, Goal Description, Goal.

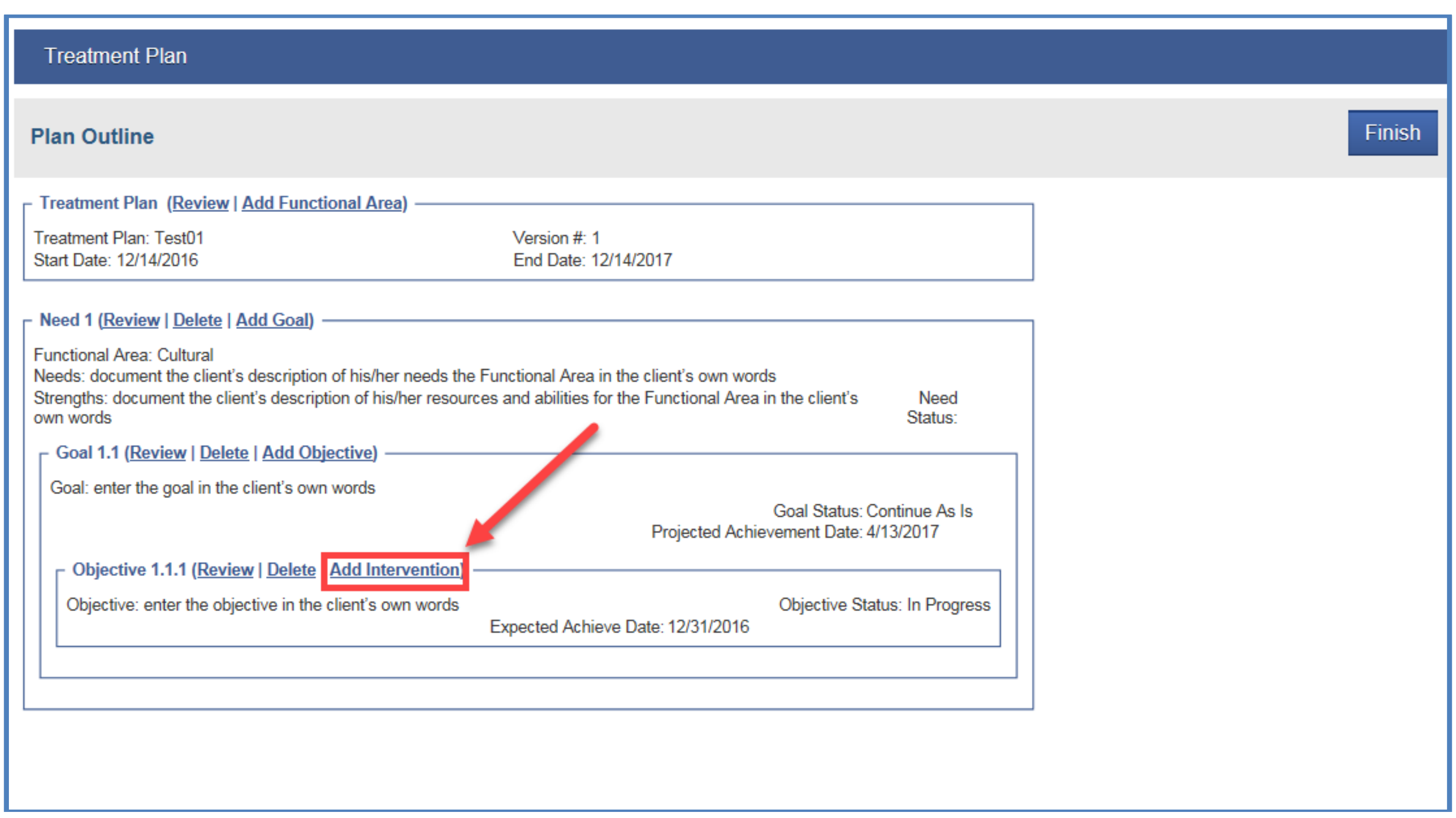


20. Complete the following fields

- I will achieve my goal by (objective) – enter the objective.
- Objective Status – the field will populate as In Progress.
- Projected Achievement Date – enter the projected achievement date.



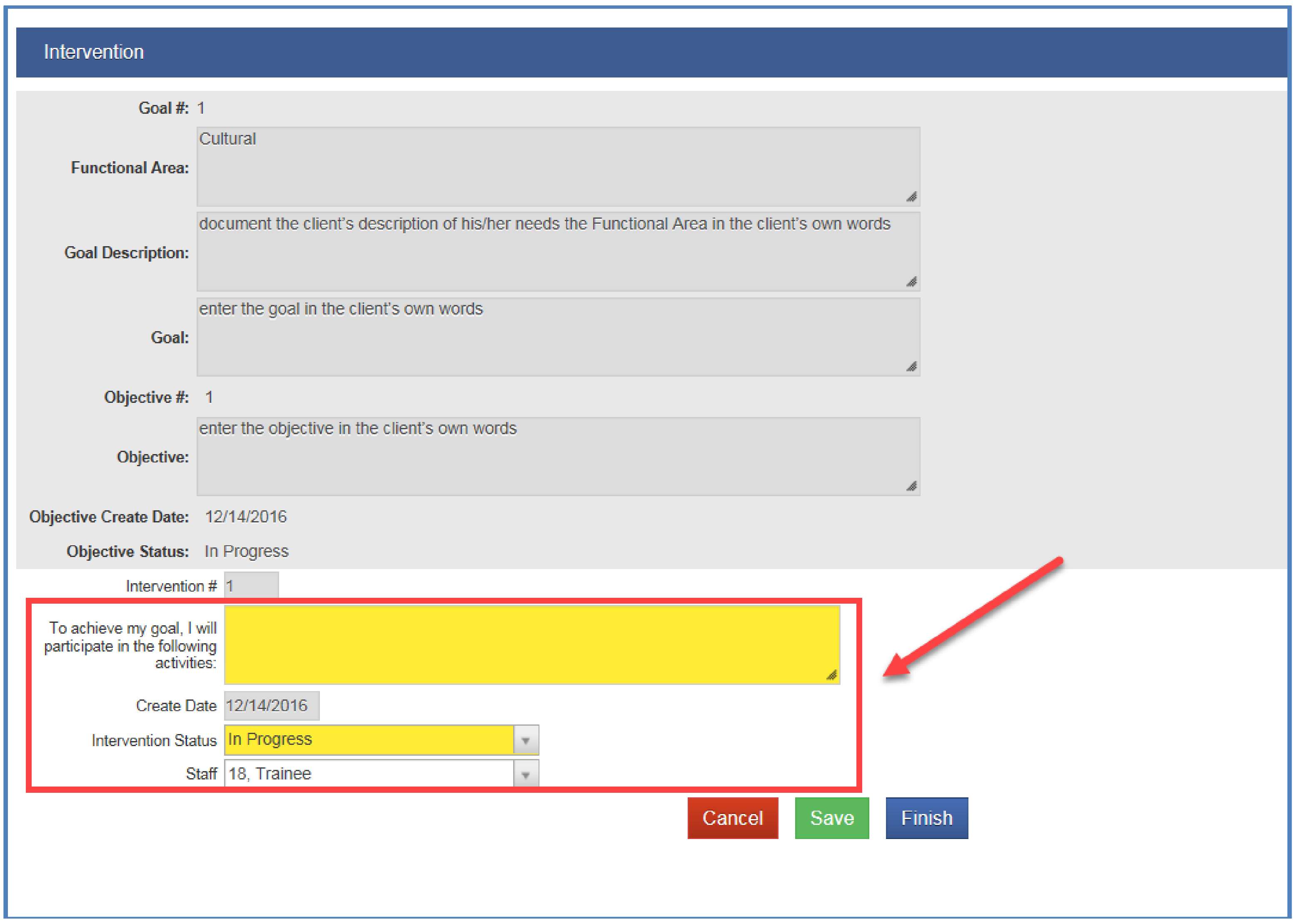
21. Click Save and click Finish to navigate back to the Treatment Plan Outline.



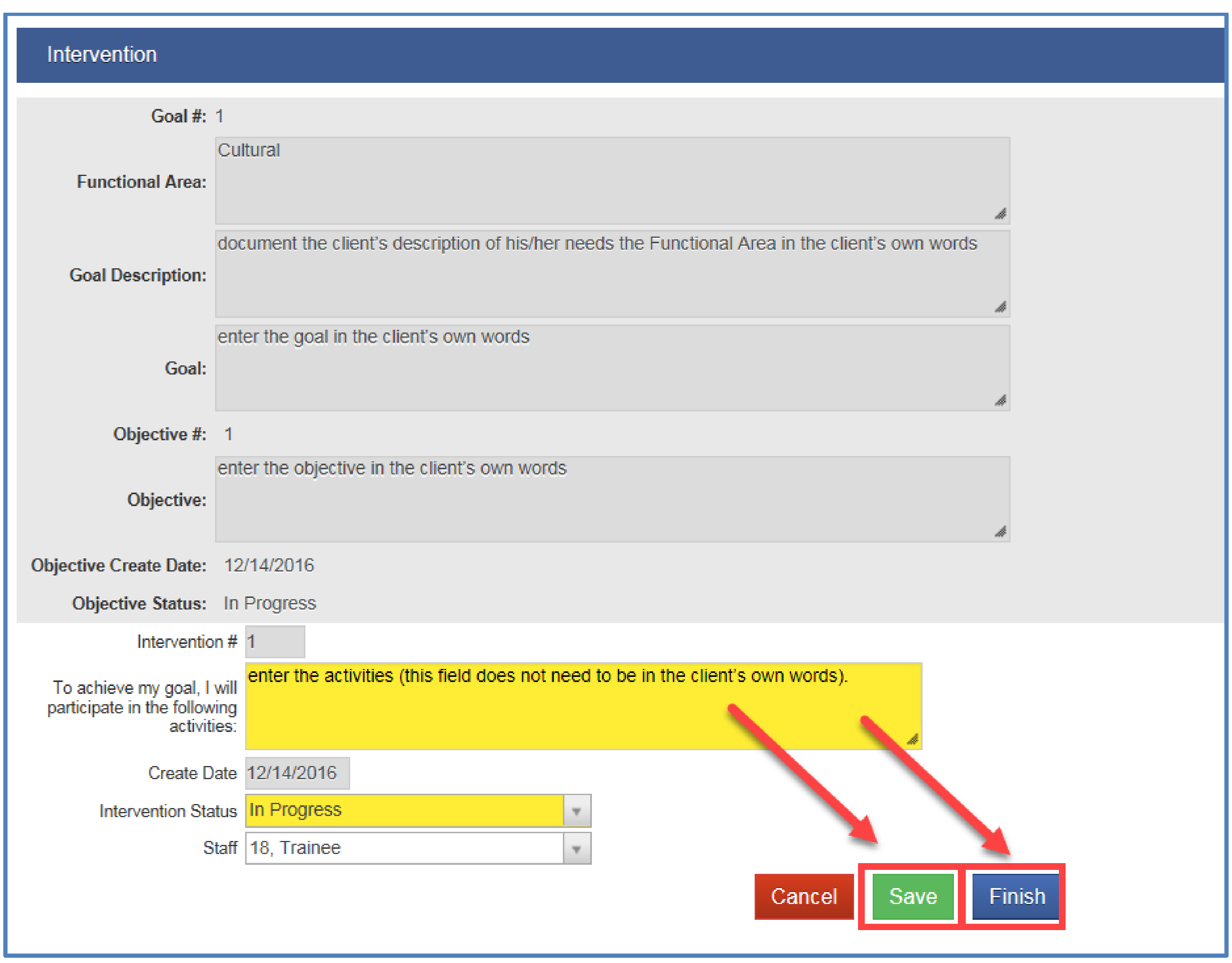
22. Click Add Intervention to add Interventions to the associated Objective.

TIPS

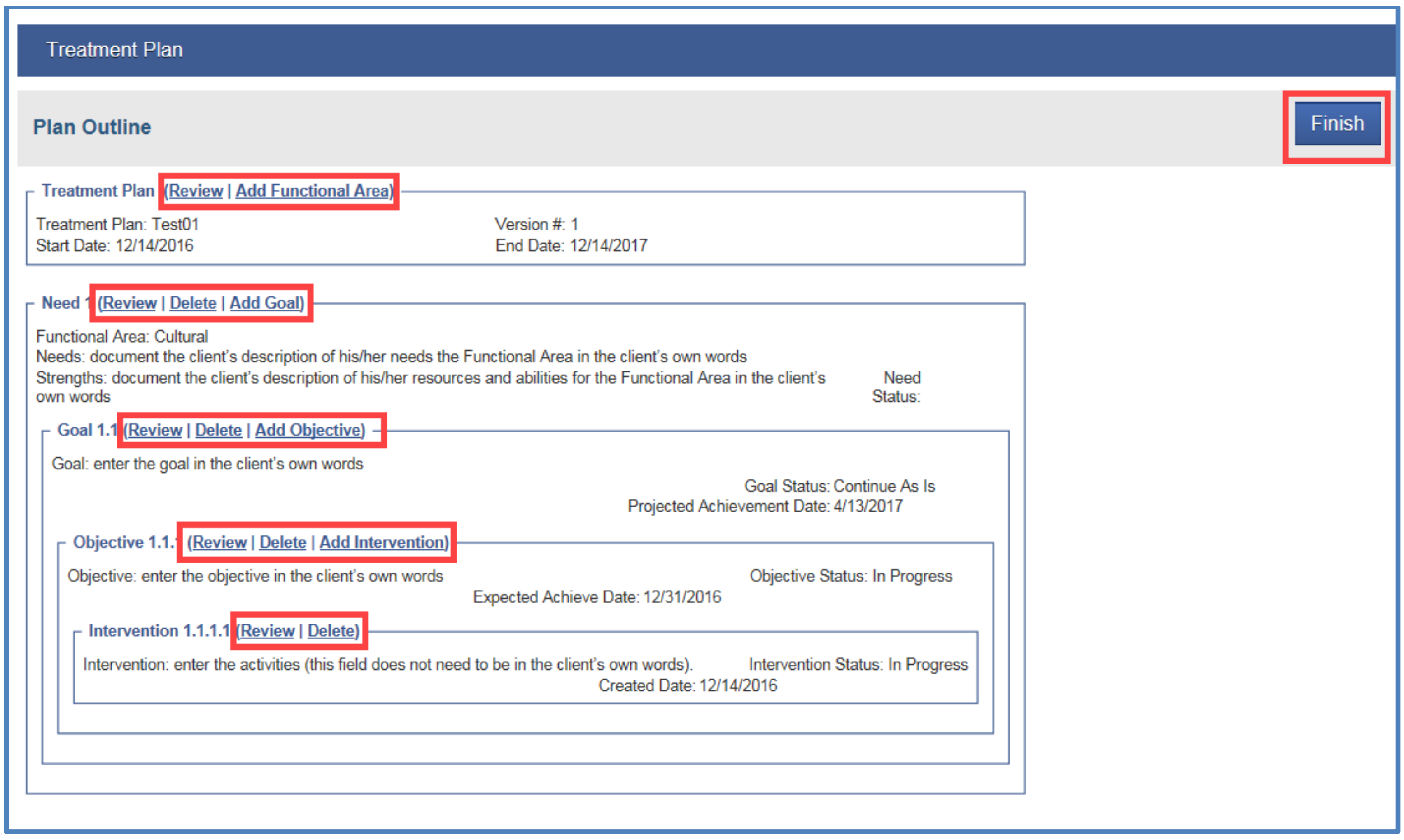
WITS populates the following fields on the Intervention page as Read Only from the Client Goal Profile and the Objective page: Goal #, Date Assessed, Functional Area, Strengths/Limits, Goal Description, Goal.



23. Complete the following fields
    - To achieve my goal, I will participate in the following activities – enter the activities
    - Intervention Status – the field will populate as In Progress.
    - Responsible Party/Participants – enter the name of the responsible party/participants.



24. Click Save and click Finish to navigate back to the Treatment Plan Outline.



25. To edit or to add new activities, click on the links located to the right of each heading.

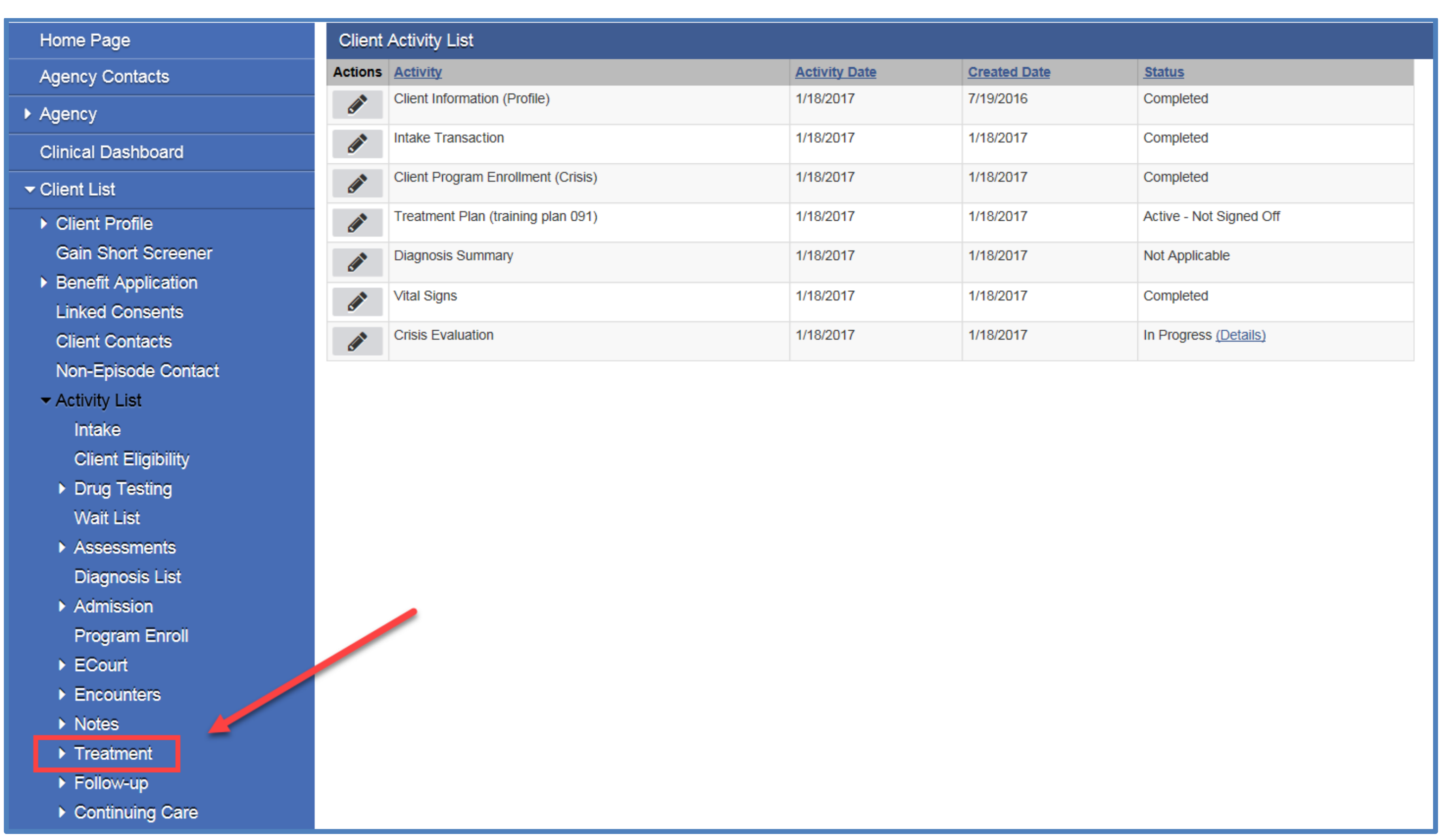
26. Click Finish if you would like the Treatment Plan to remain in Active – Not Signed Off status. This means the Treatment Plan can be edited and signed at a later date.

27. Otherwise, follow these directions to electronically sign the Treatment Plan.

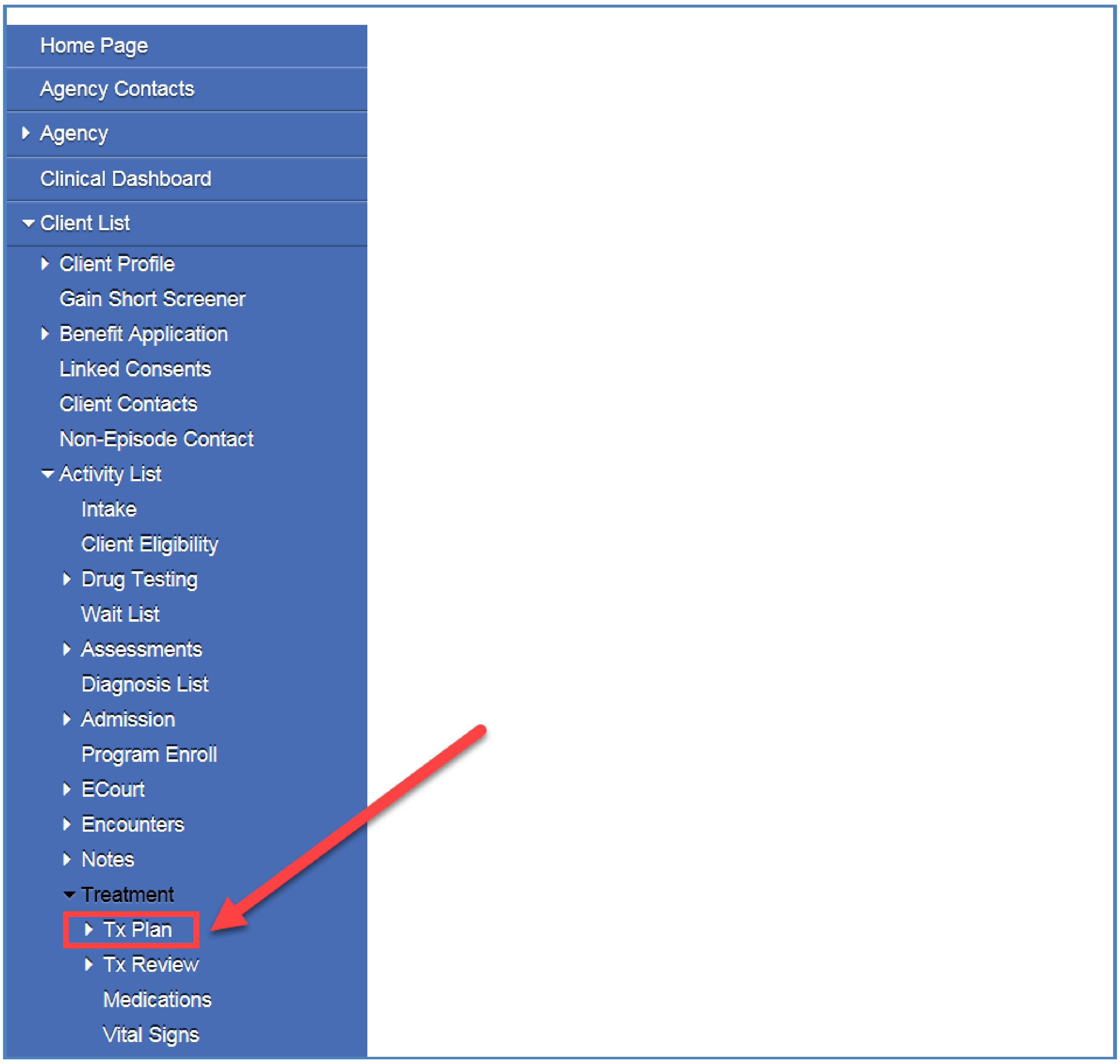
Electronically Signing the Treatment Plan

Once a Treatment Plan is signed, it cannot be changed or edited.

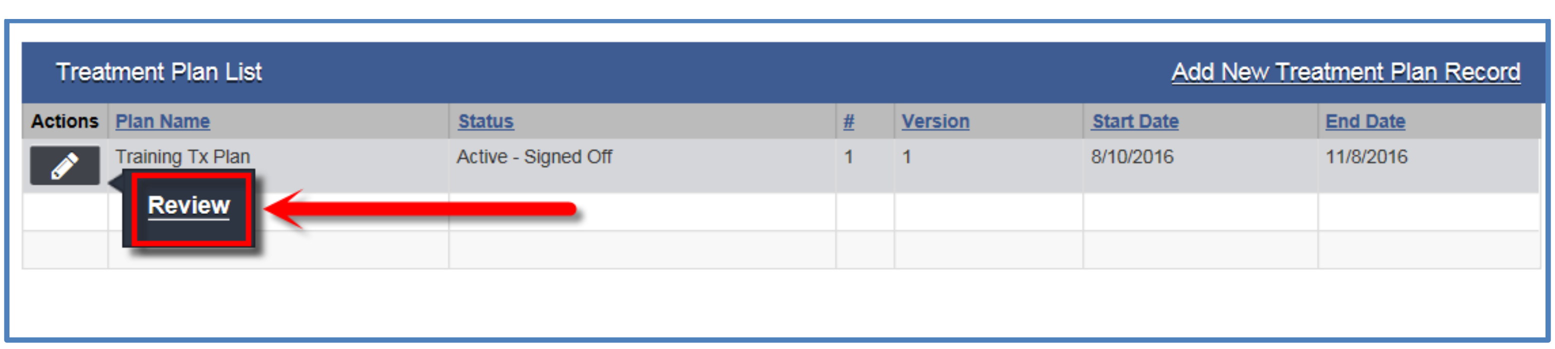
1. Begin on the Client Activity List.



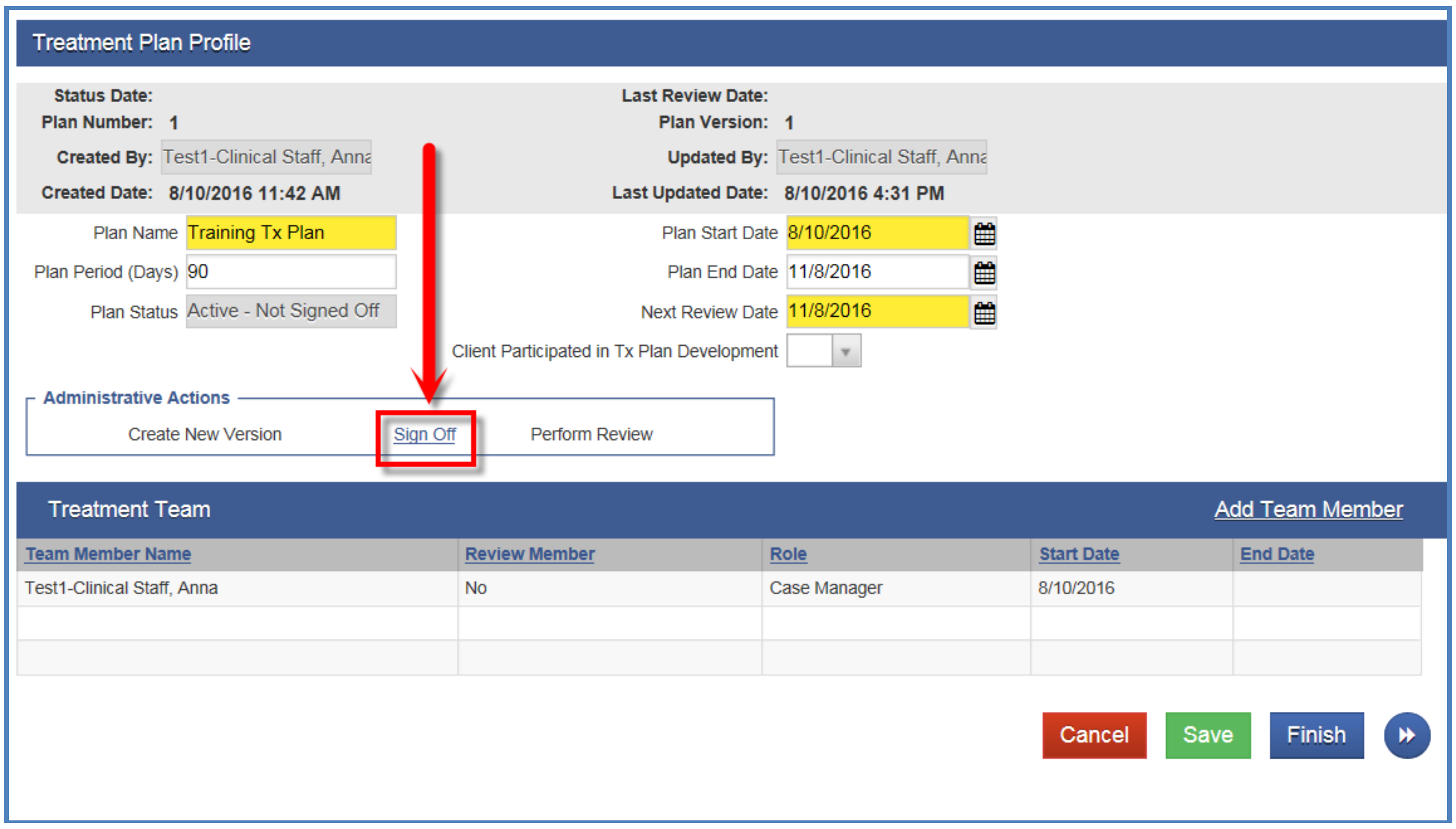
2. Click Treatment on the blue navigation pane.



3. Click Tx Plan on the blue navigation pane.

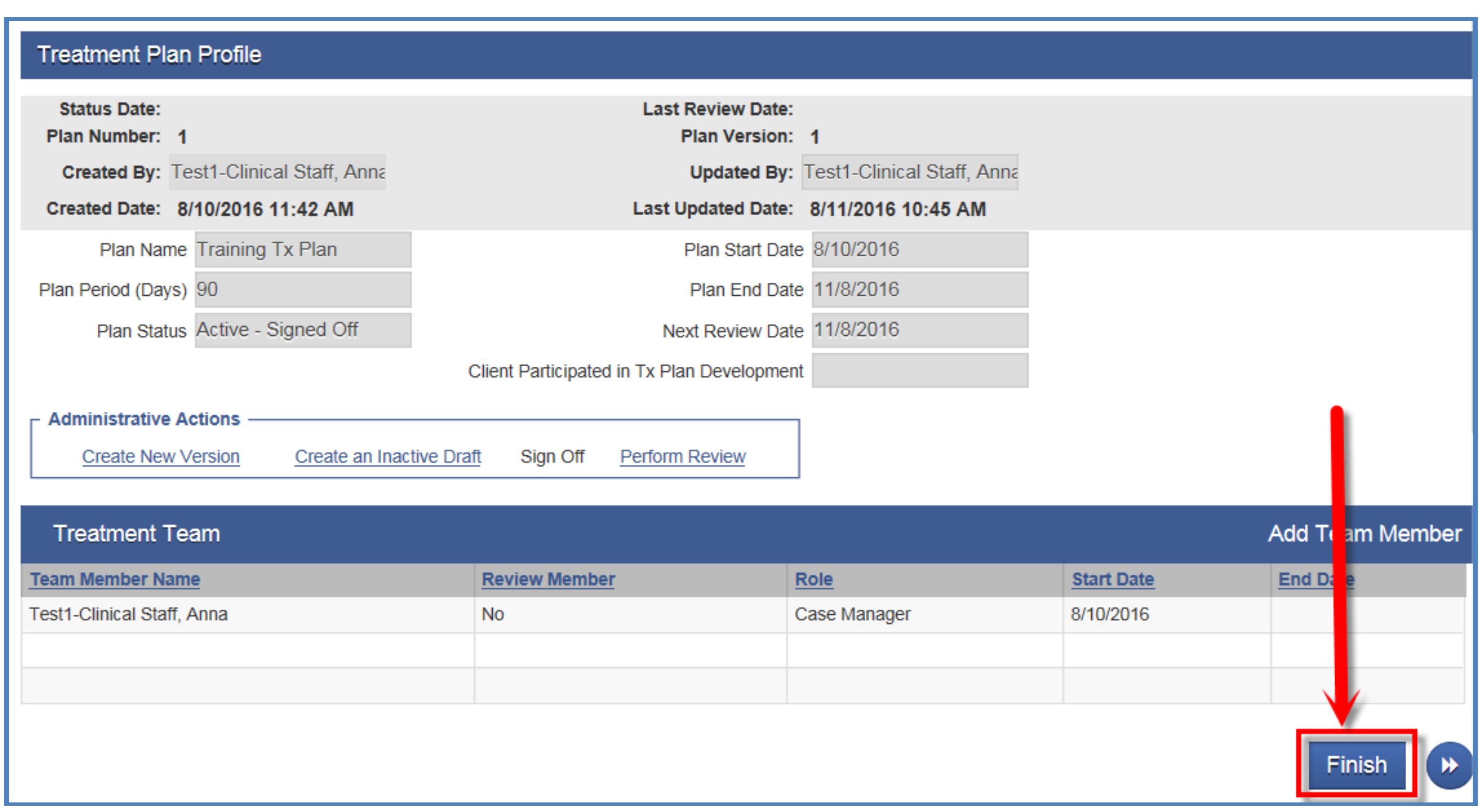


4. Hover over the and click **Review**.



5. Click Sign Off in the Administrative Actions section of the Treatment Plan Profile.

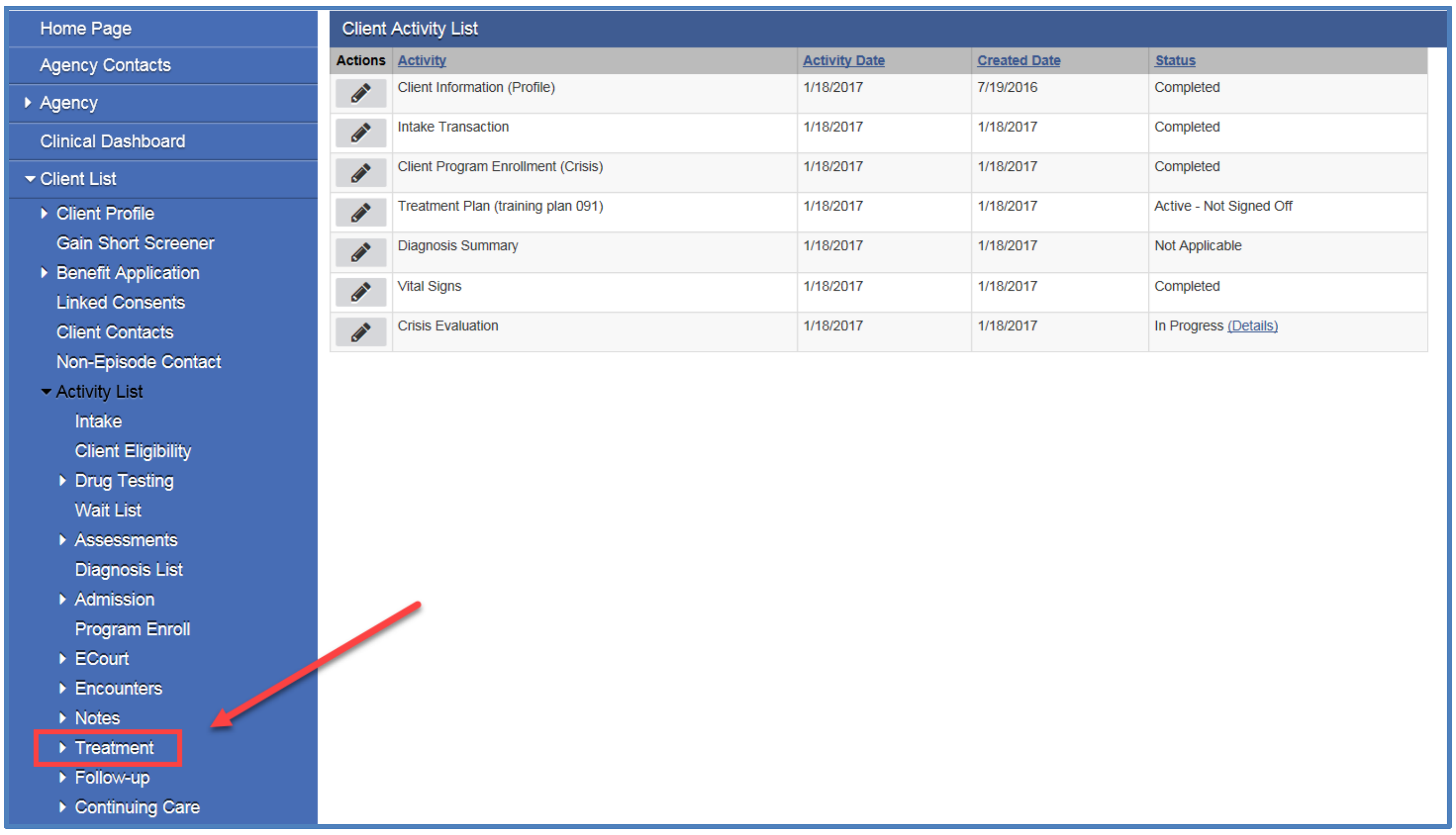
6. Click Yes to electronically sign the Treatment Plan or click No to cancel.



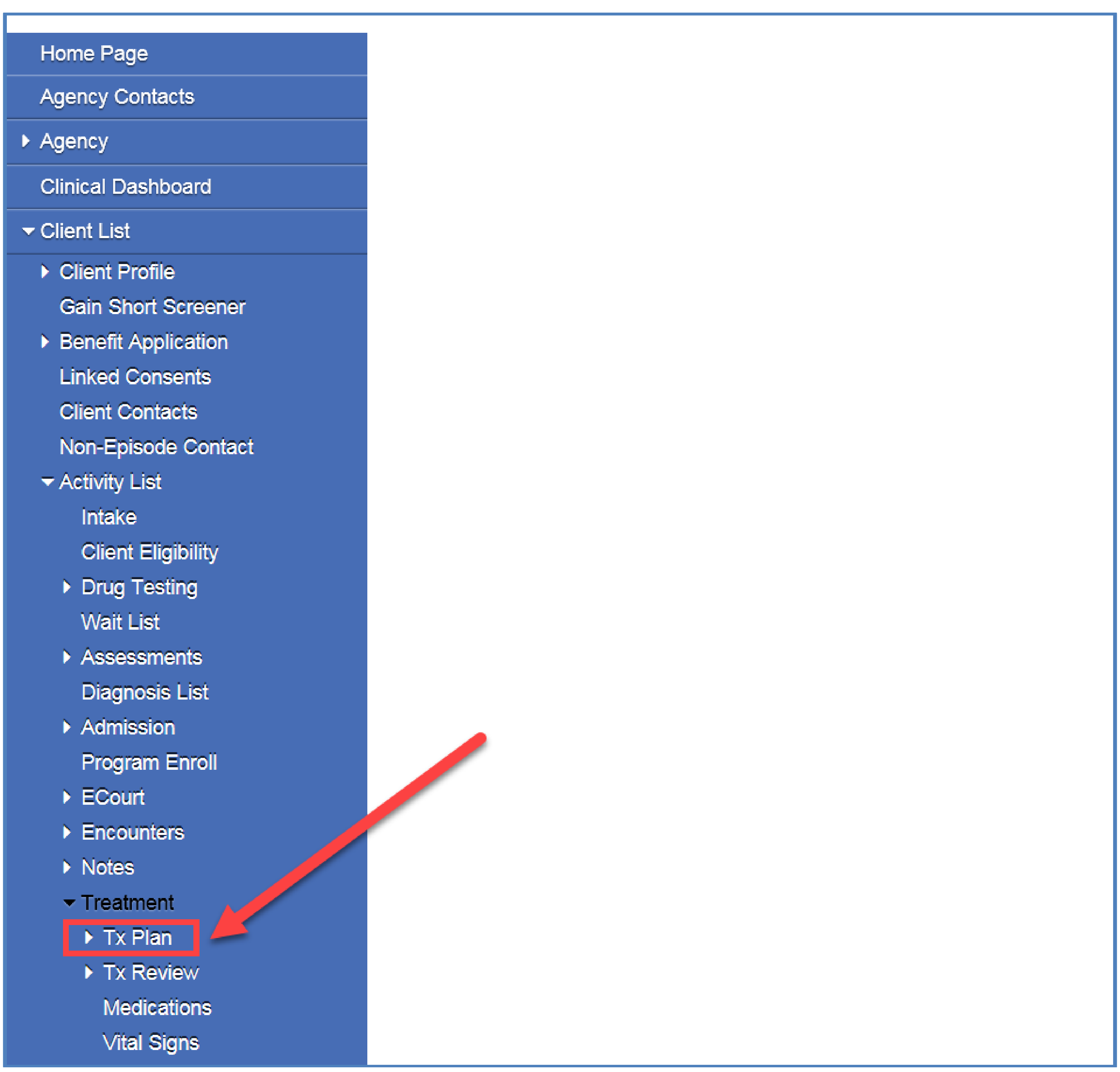
7. The Treatment Plan becomes Read Only. Click Finish.

Printing the Treatment Plan

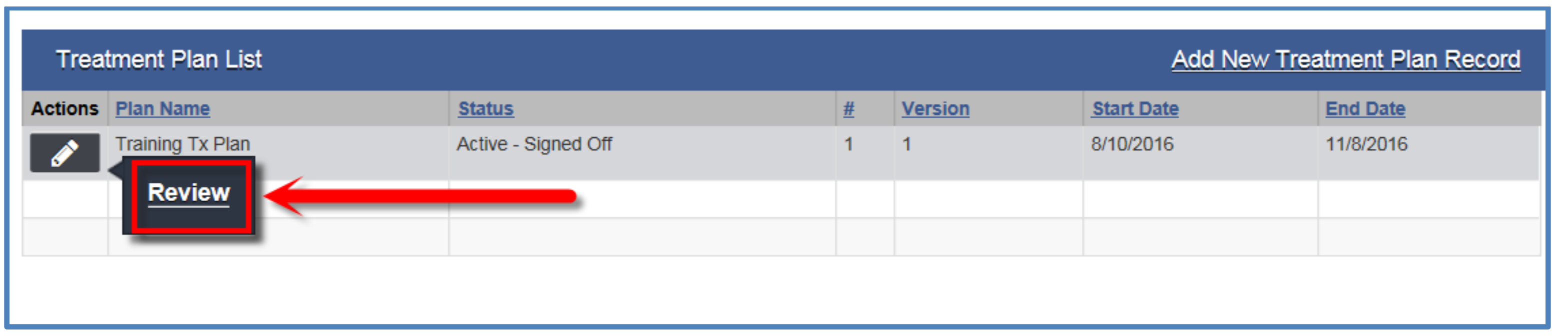
1. Begin on the Client Activity List.



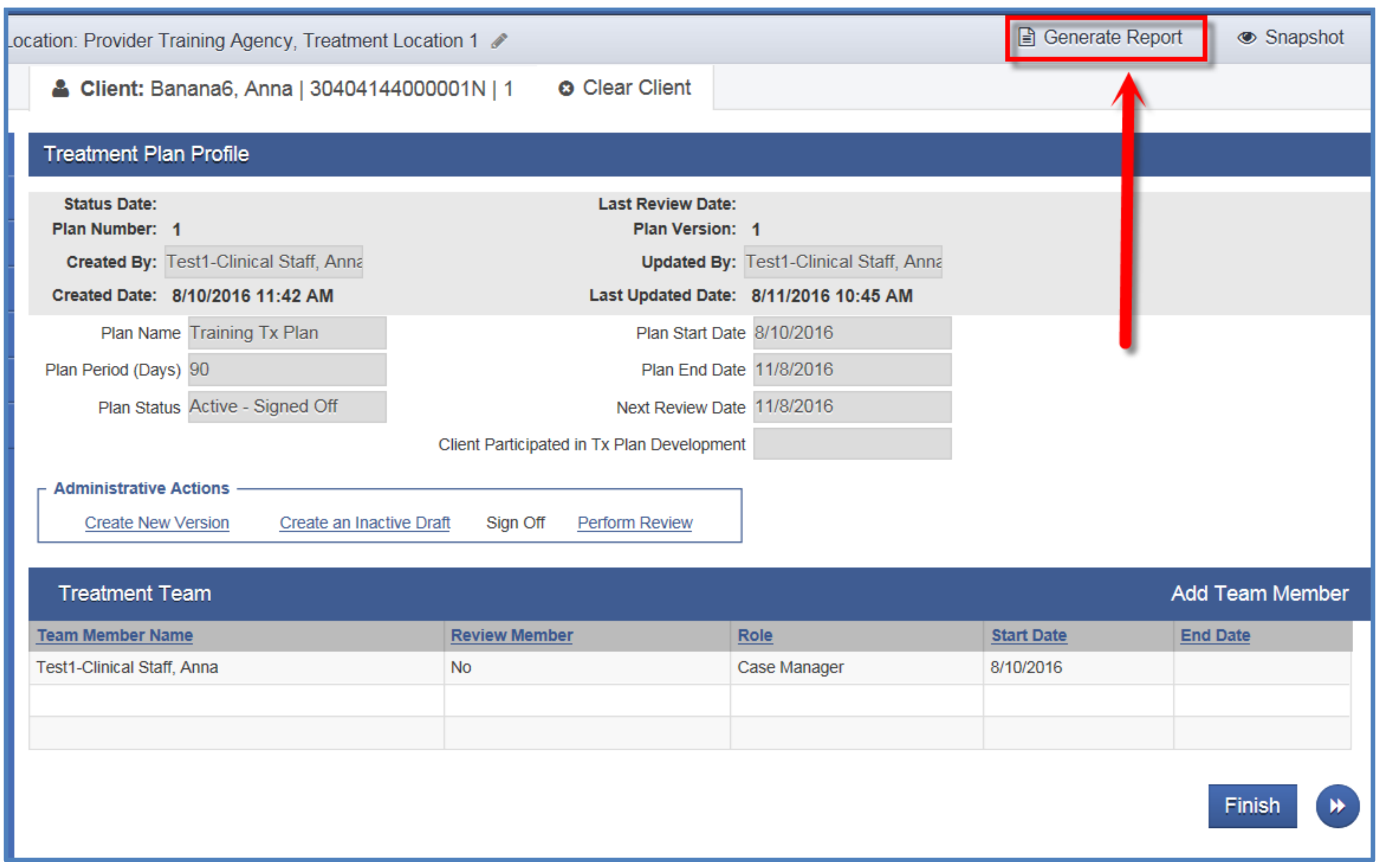
2. Click Treatment on the blue navigation pane.



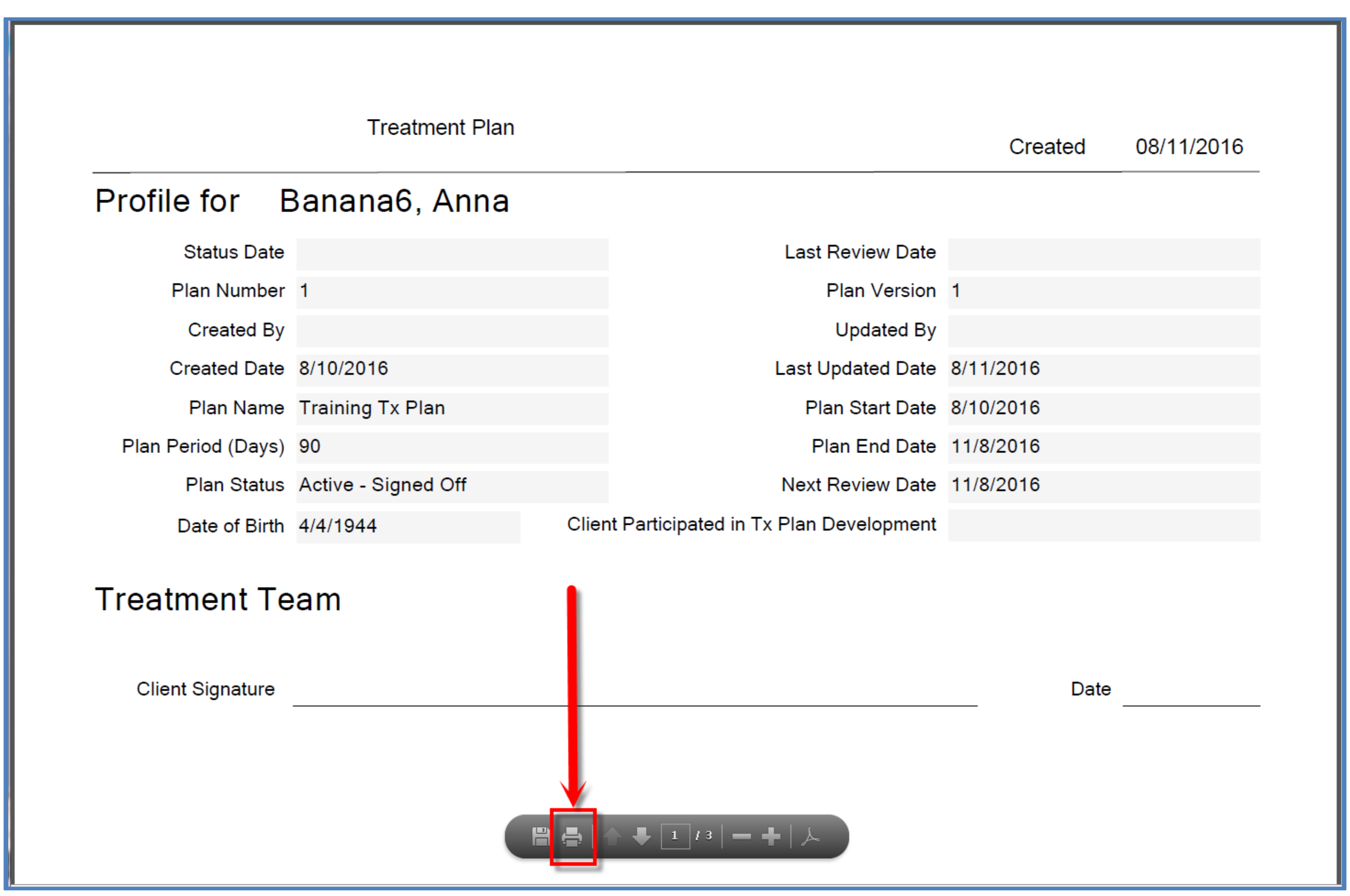
3. Click Tx Plan on the blue navigation pane.

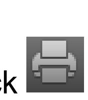


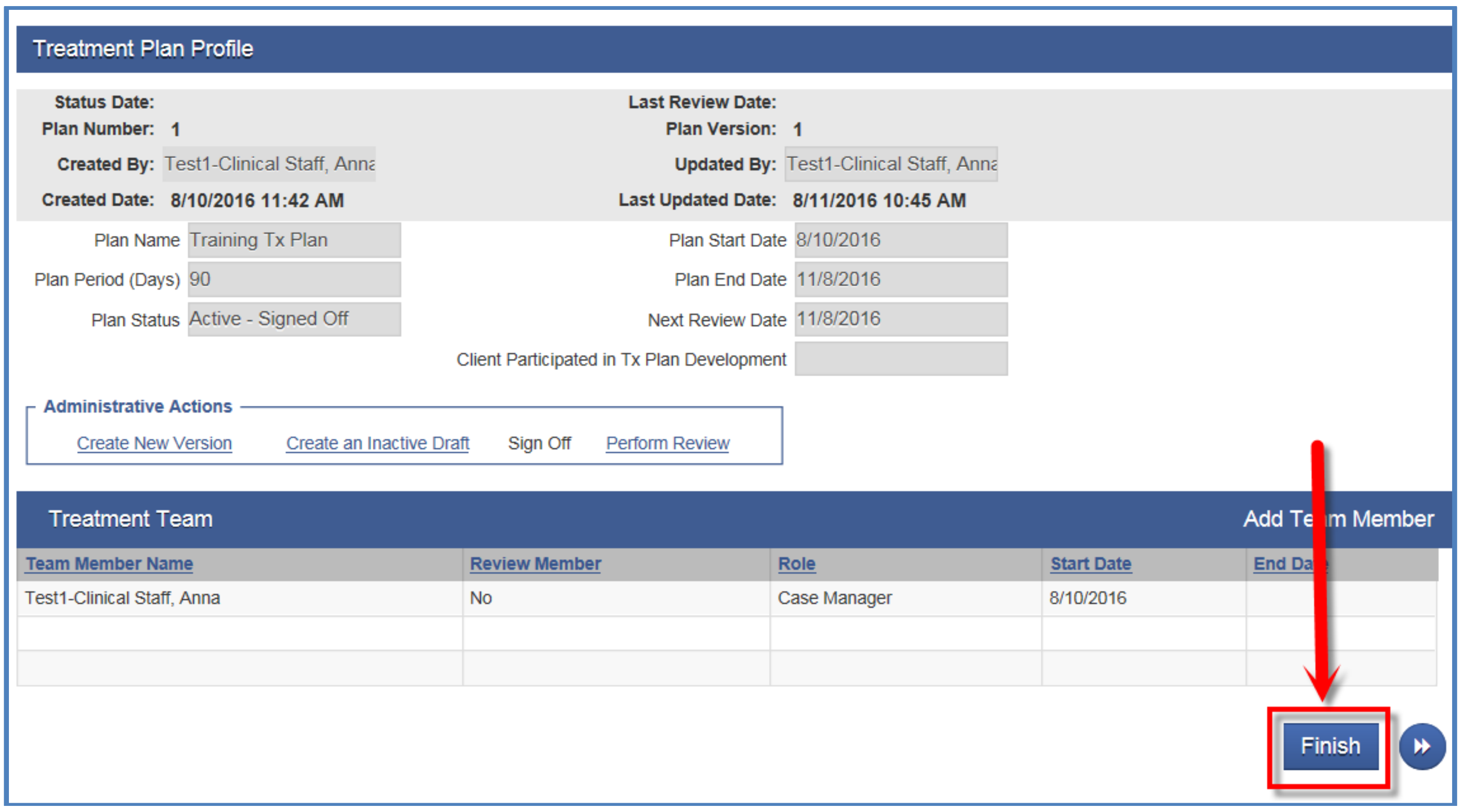
4. Hover over the  and click **Review**.



5. The Treatment Plan is Read Only. Click **Generate Report** to print a copy of the Treatment Plan.



6. The report will display as a PDF in a separate window. Click  (the print icon) and close the PDF window when finished.



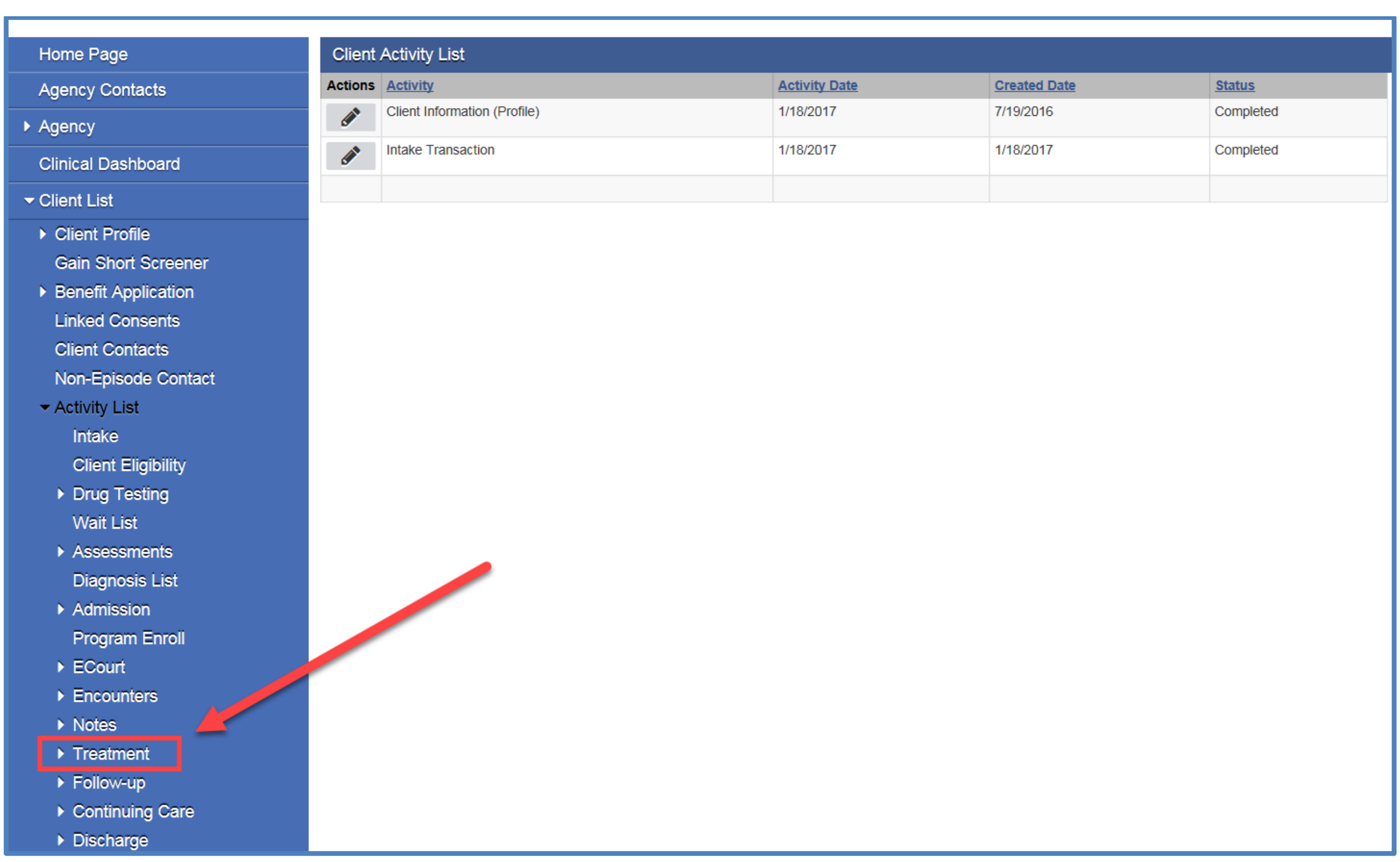
7. Click Finish.

Vital Signs

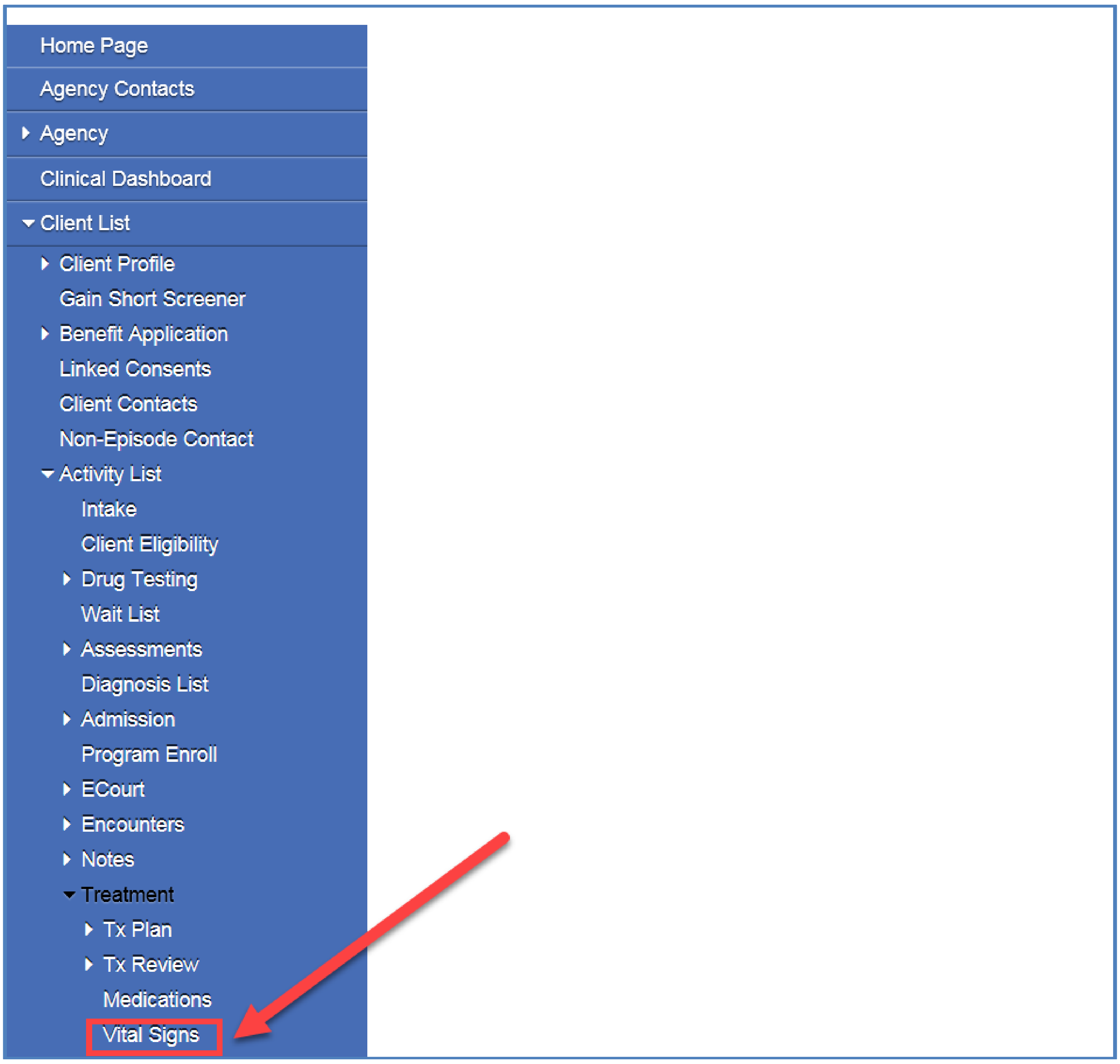
Purpose: The vital signs page documents a client's vital signs during an episode of care.

Creating a Vital Signs Record

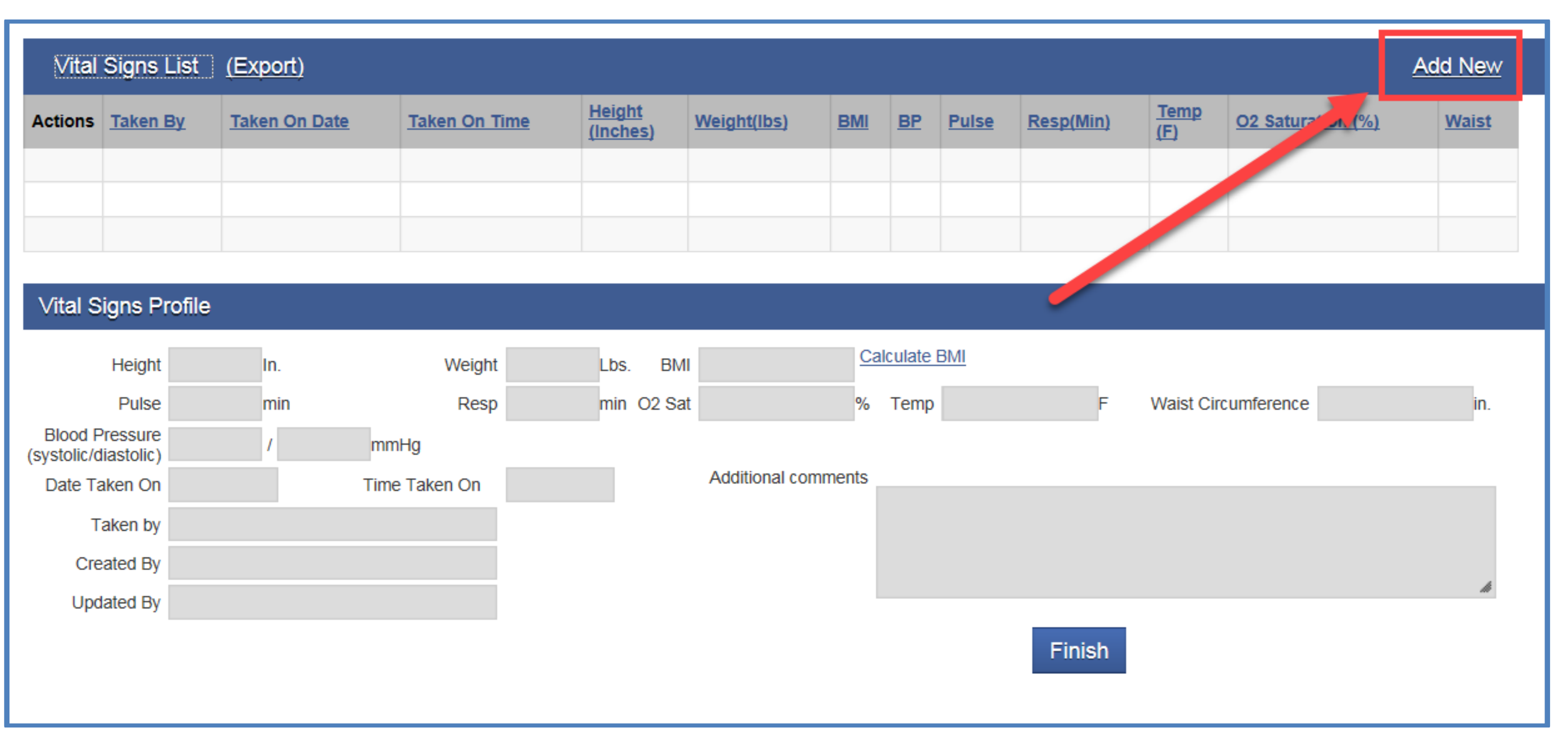
1. Begin on the Client Activity List.



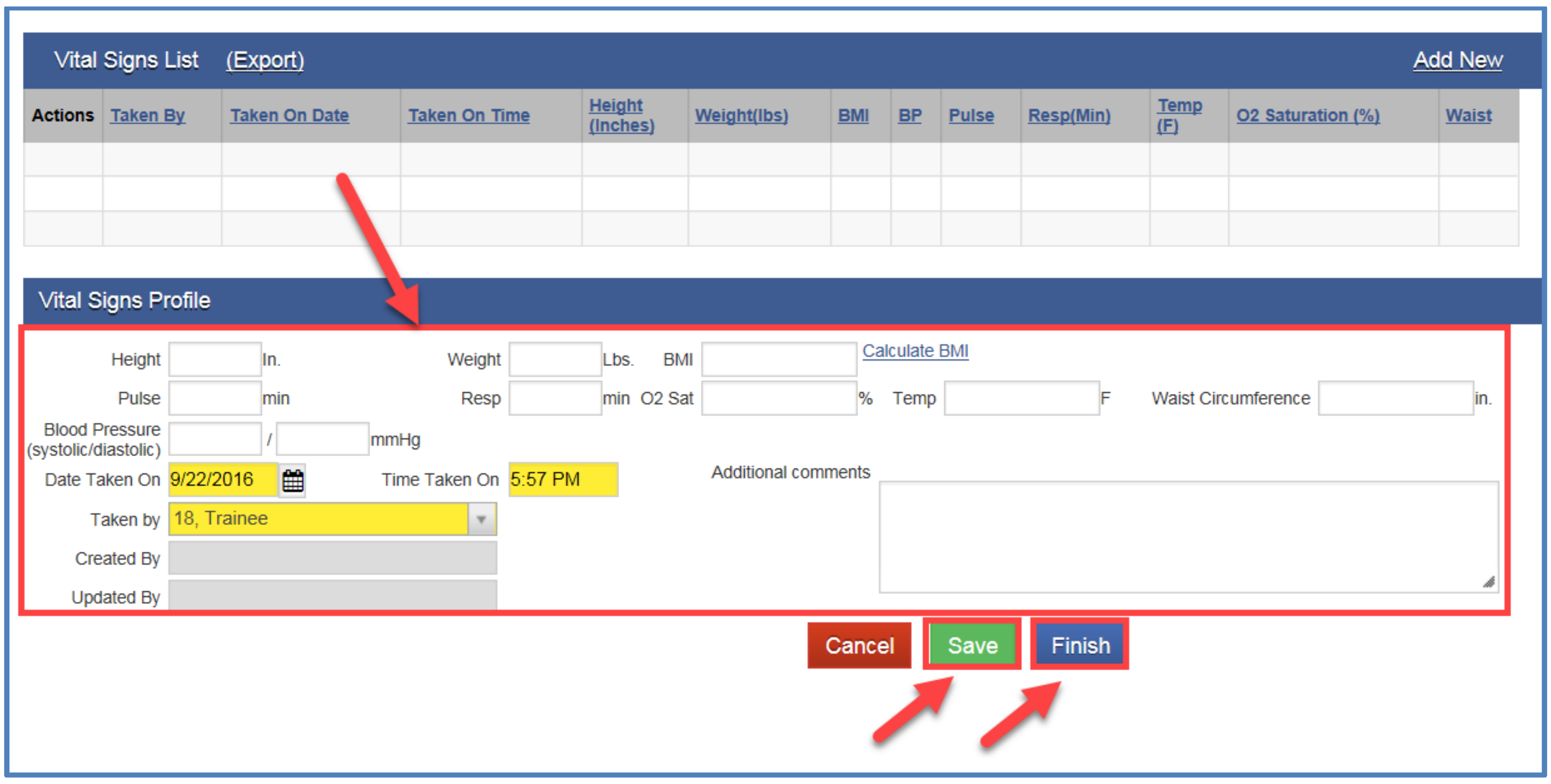
2. Once you're on the Activity List, click Treatment on the blue navigation pane.



3. Click Vital Signs.



4. Click Add New.

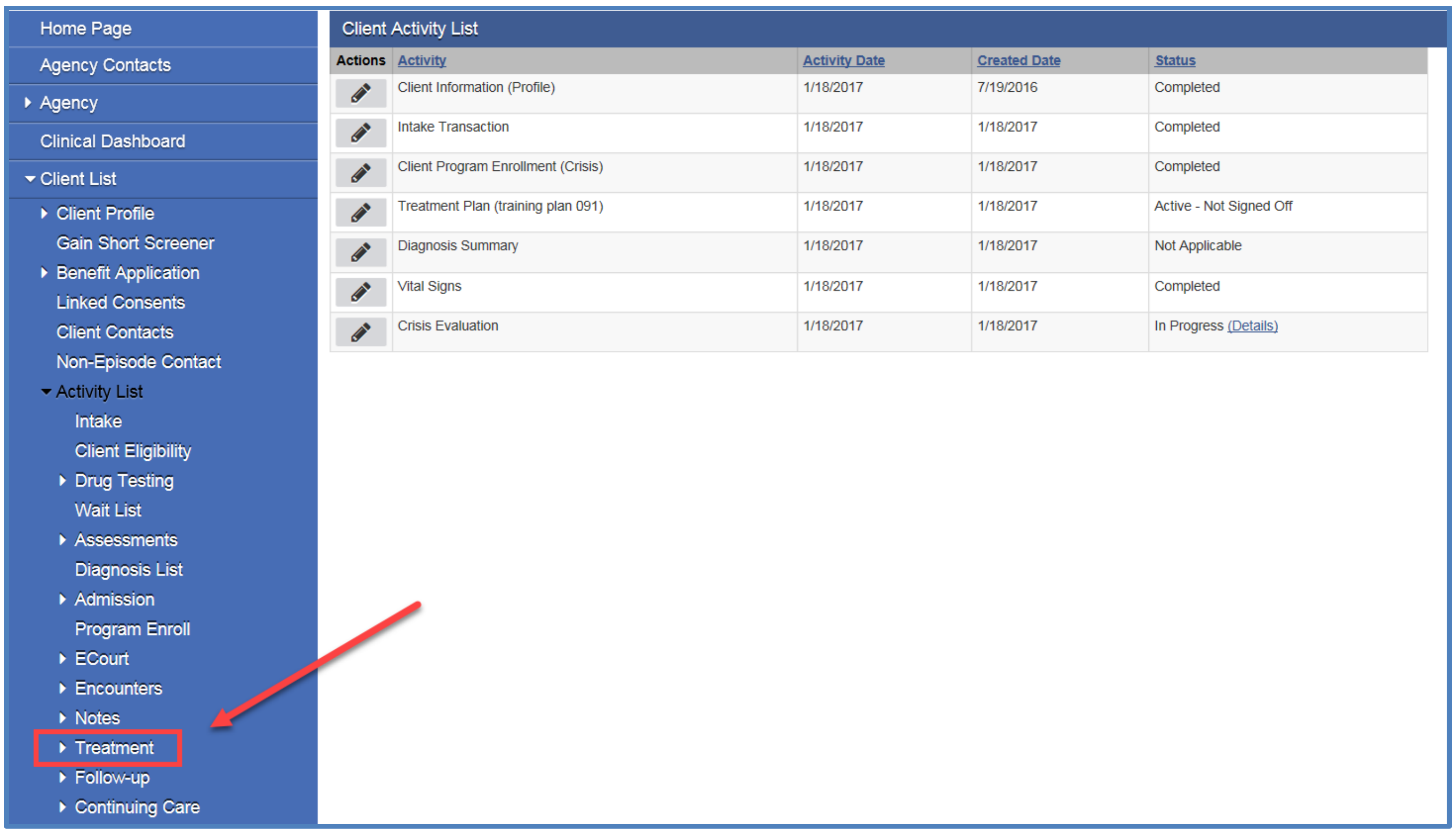


5. Complete the following fields as directed by your agency.
    - Height – enter height in inches.
    - Weight – enter weight in pounds.
    - BMI – click Calculate BMI .
    - Pulse – enter beats per minute.
    - Resp – enter respiratory.
    - O2 Sat – enter O2 sat percentage.
    - Temperature – enter temperature.
    - Waist Circumference – enter waist circumference in inches.
    - Blood Pressure – enter systolic and diastolic.
    - Date taken on – the field will populate with today's date. Update as needed.
    - Time taken on – the field will populate with the time the record was created. Update as needed.
    - Performed by – the field will populate with the name of the person creating the vital signs record. Update as needed.
6. Click Save and Finish .

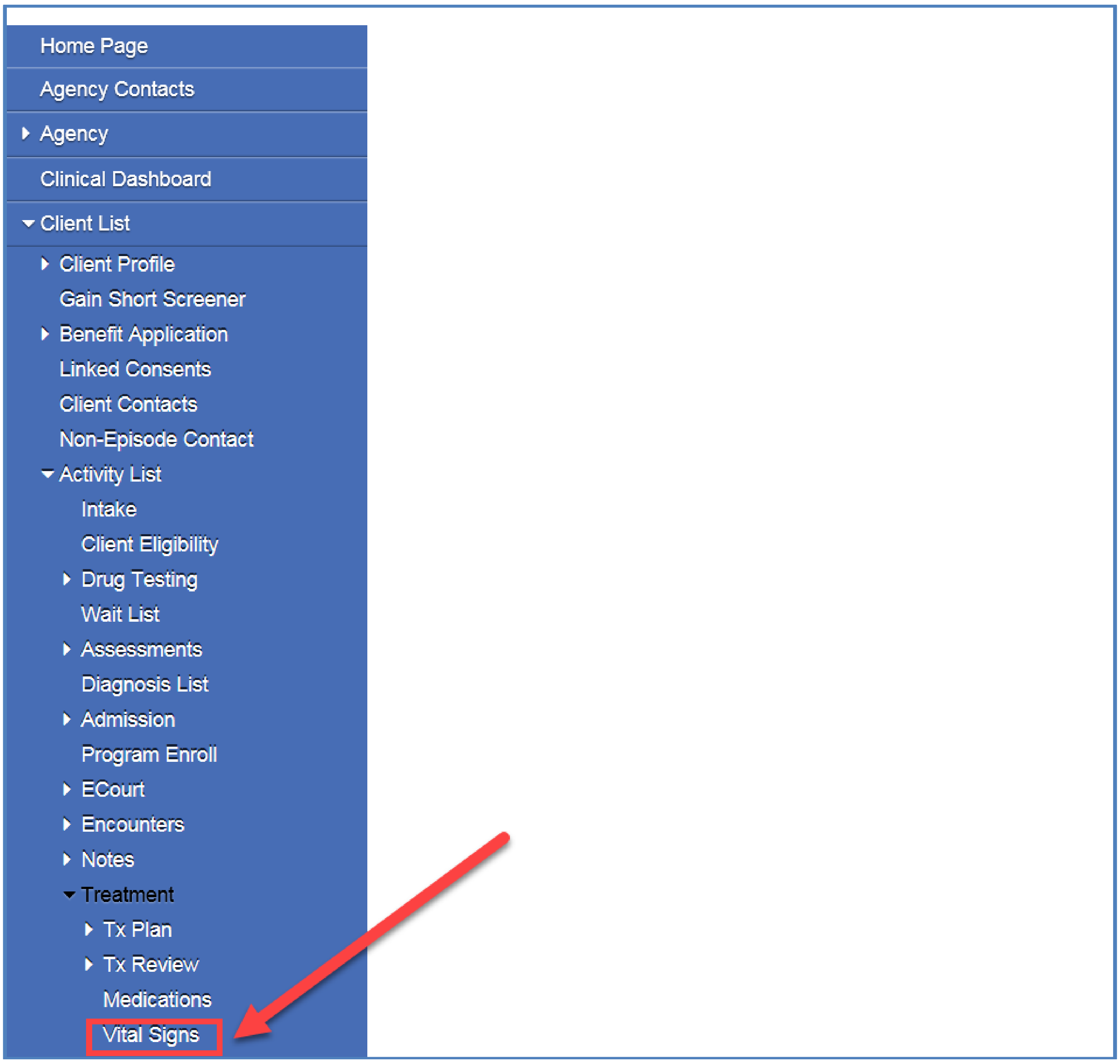
Deleting a Vital Signs Record

Vital Signs in WITS are considered a part of the client's official electronic health record (EHR). It is your agencies responsibility to ensure you are adhering to the documentation standards set forth by IDAPA.

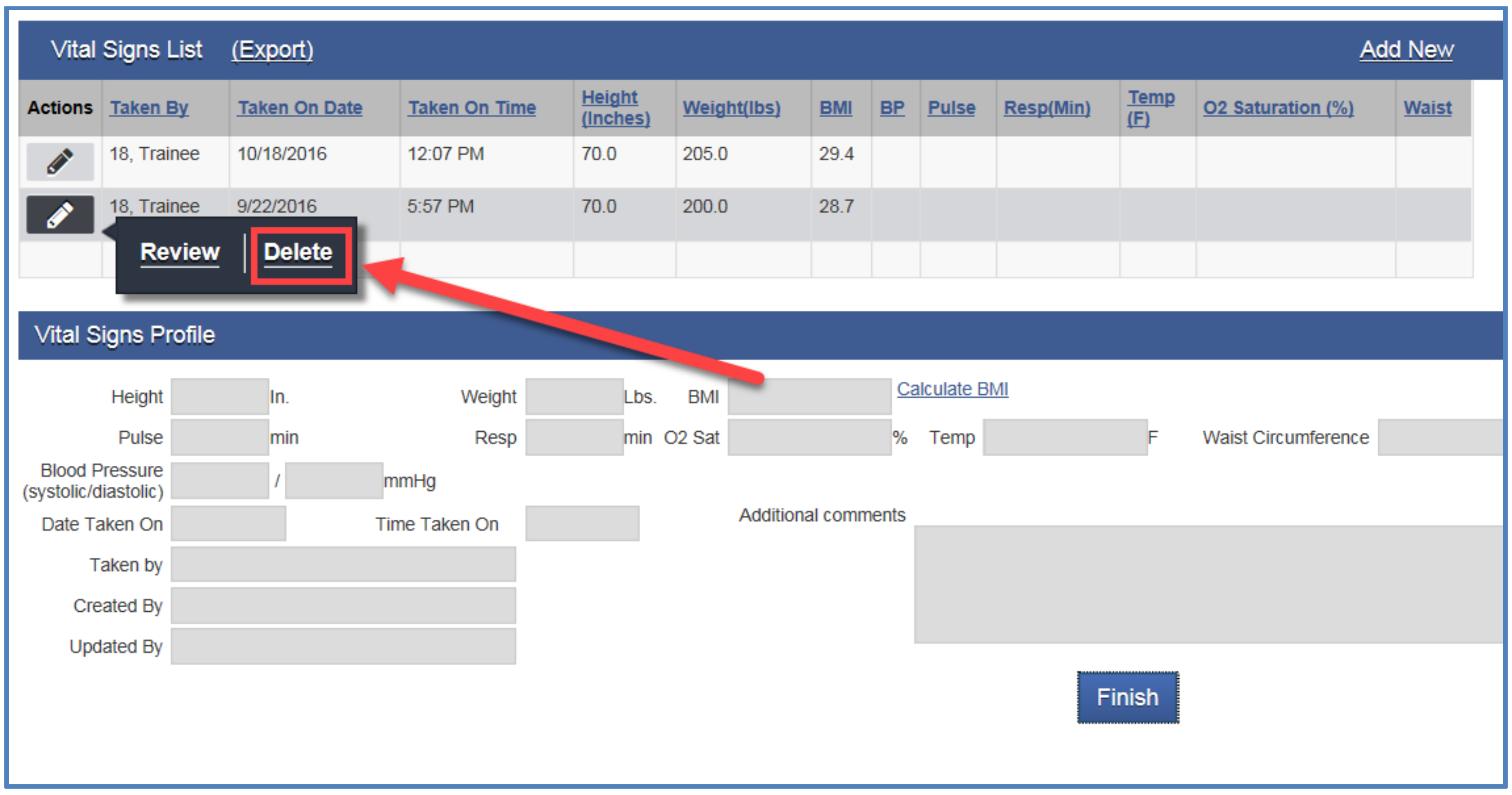
1. Begin on the Client Activity List.



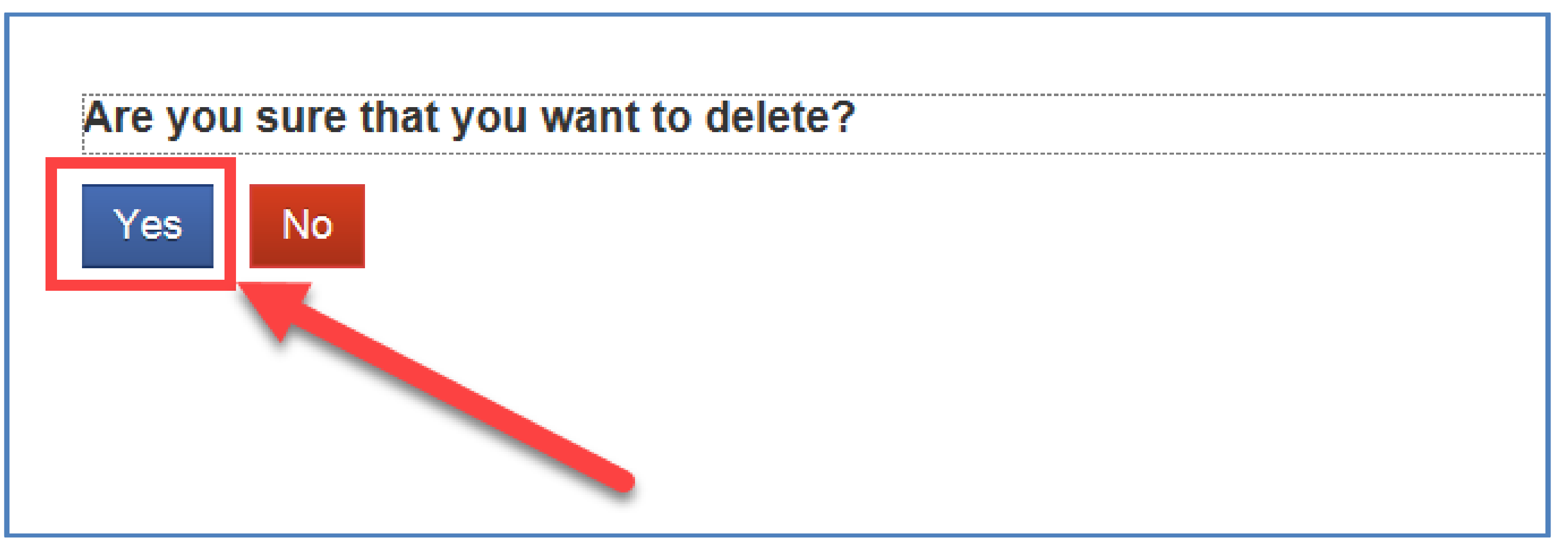
2. Once you're on the Activity List, click Treatment on the blue navigation pane.



3. Click Vital Signs on the blue navigation pane.



4. The Vital Signs List displays. Hover over the and click Delete under Actions for the vital signs record you want to delete.



5. Click Yes to delete the vital signs record or click No to cancel.

Agency WITS Administrator Guidance

Staff Member Accounts

Agency WITS Administrators are responsible for creating, modifying, and revoking agency staff member accounts.

BHCCC Staff Roles

When assigning roles for staff members, follow the below chart to ensure the correct level of access is granted.

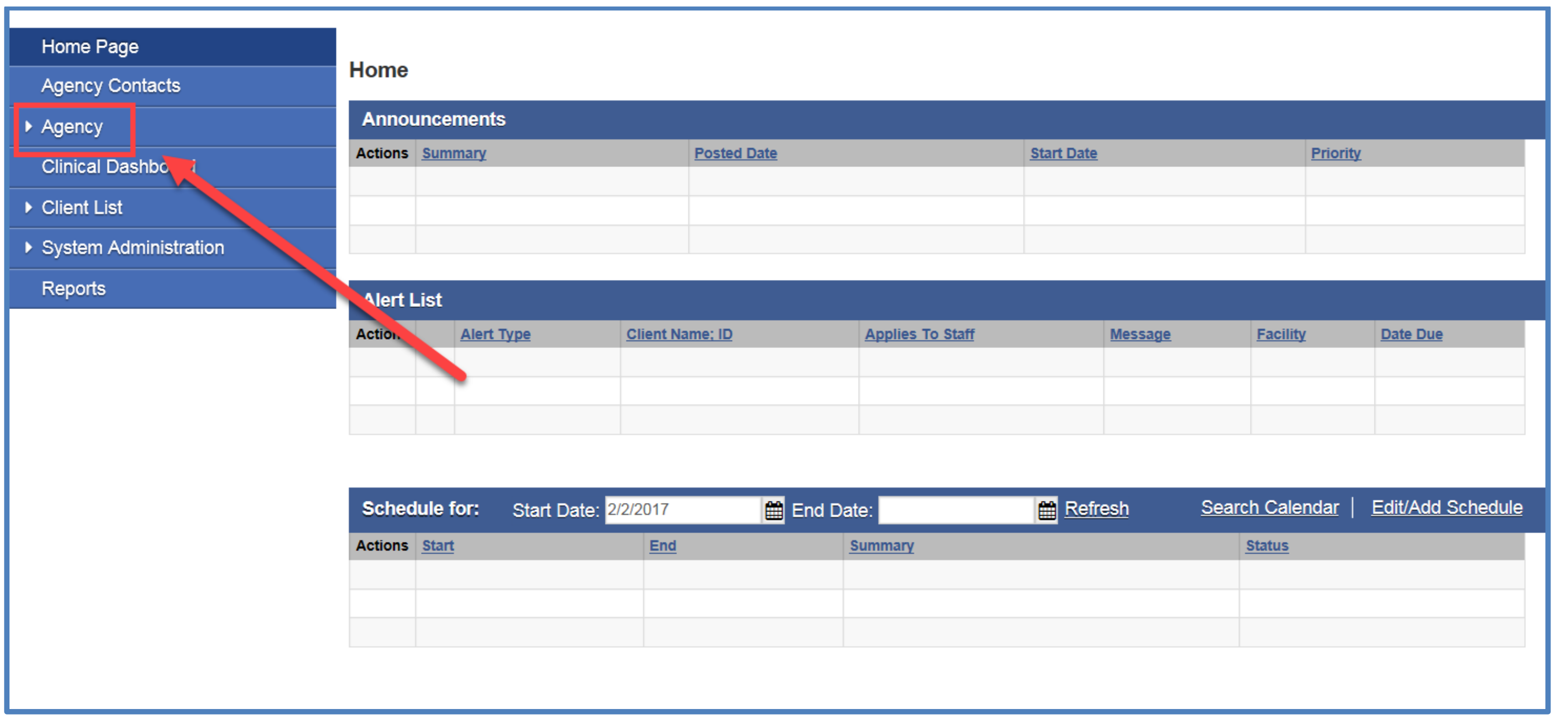
Assign the following roles to all staff members
Clinical (Full Access) Drug Testing (Full Access) Group Notes (Full Access) Link Consents Manage Staff Schedules (Read-Only) Vital Signs (Full Access)
Optional Permissions
Reset Logon
RESOURCES
WITS Website: www.wits.idaho.gov **WITS Help Desk:** Email: dbhwitshd@dhw.idaho.gov Phone: 208-332-7316 or toll-free 1-844-726-7493 Hours: Monday-Friday, 8:00am-5:00pm (Mountain Time)

Enabling, Resetting Passwords/Pins, and Unlocking a Staff Account

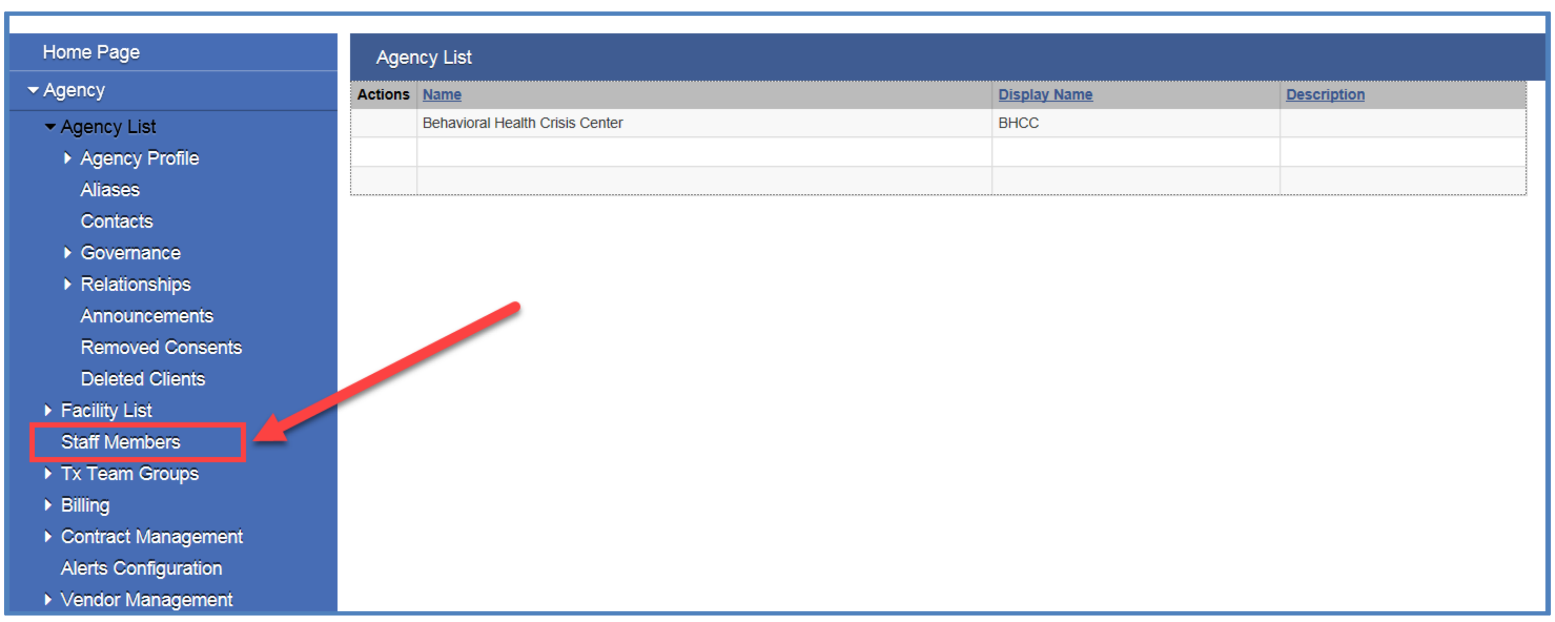
Enabling a Staff Member's WITS Account

When a staff member enters their password or pin incorrectly more than three times, the system automatically disables their account. When an account is disabled, the staff member will not be able to log into WITS. Only AWAs, staff with the appropriate permissions, or WITS Help Desk staff have the ability to enable an account in your agency.

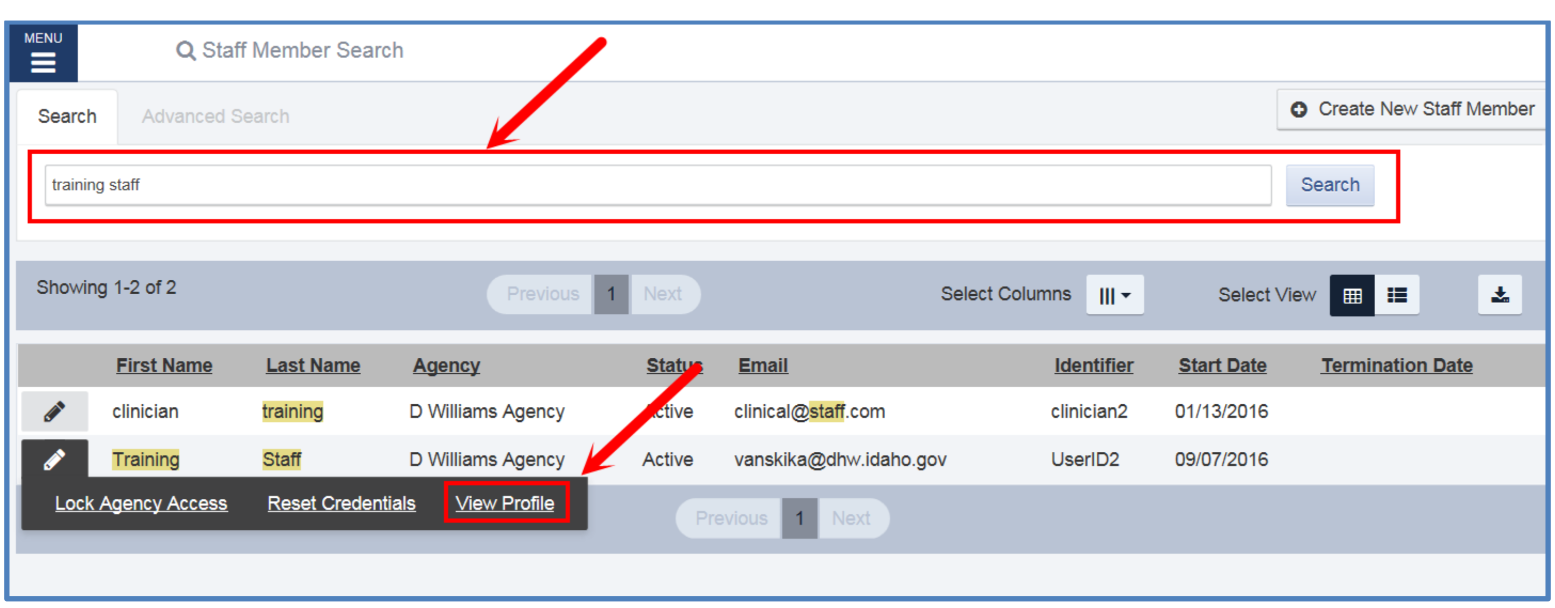
1. Begin on the Home Page.



2. Click **Agency** on the blue navigation pane.

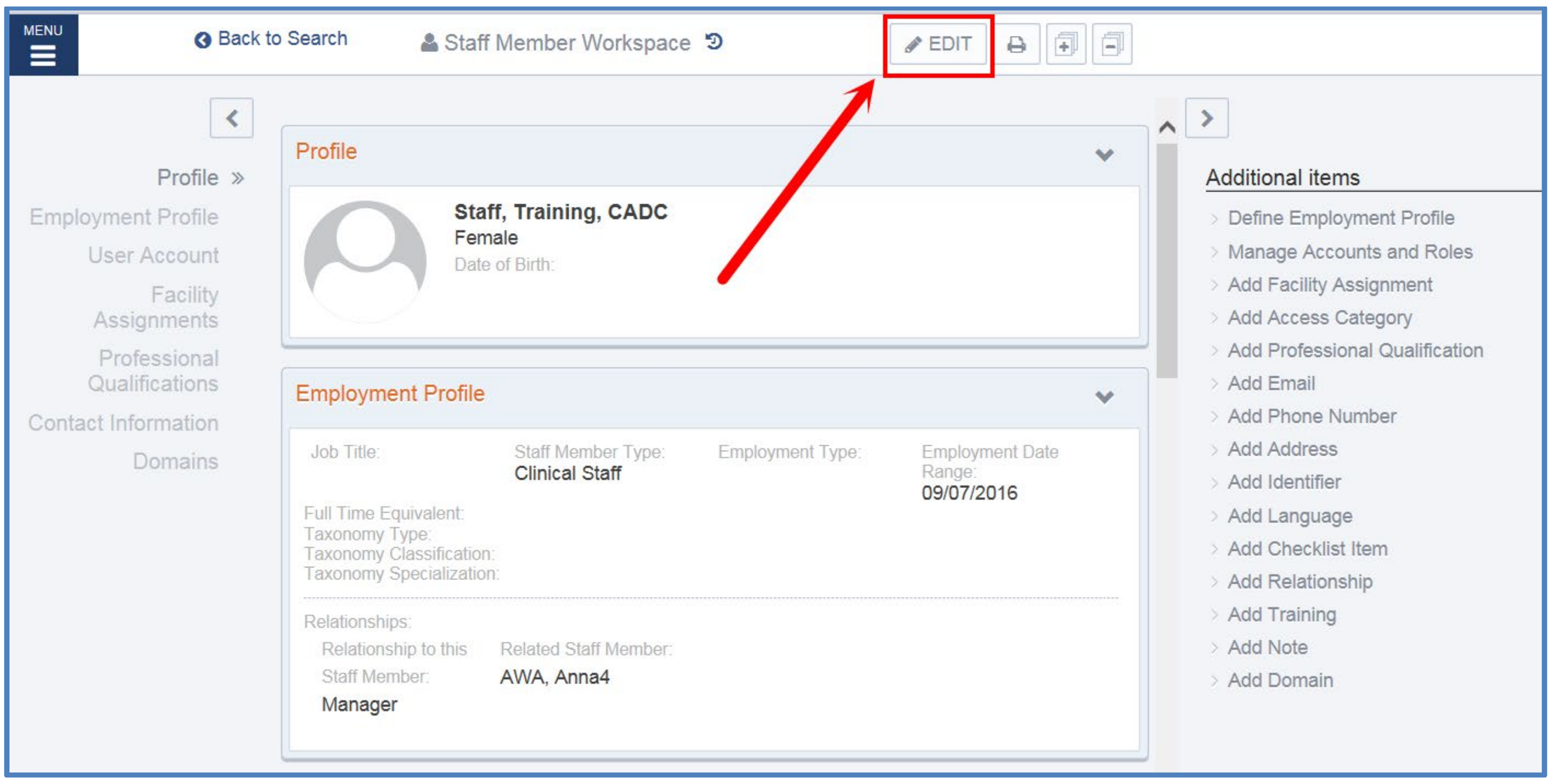


3. Click **Staff Members** on the blue navigation pane.



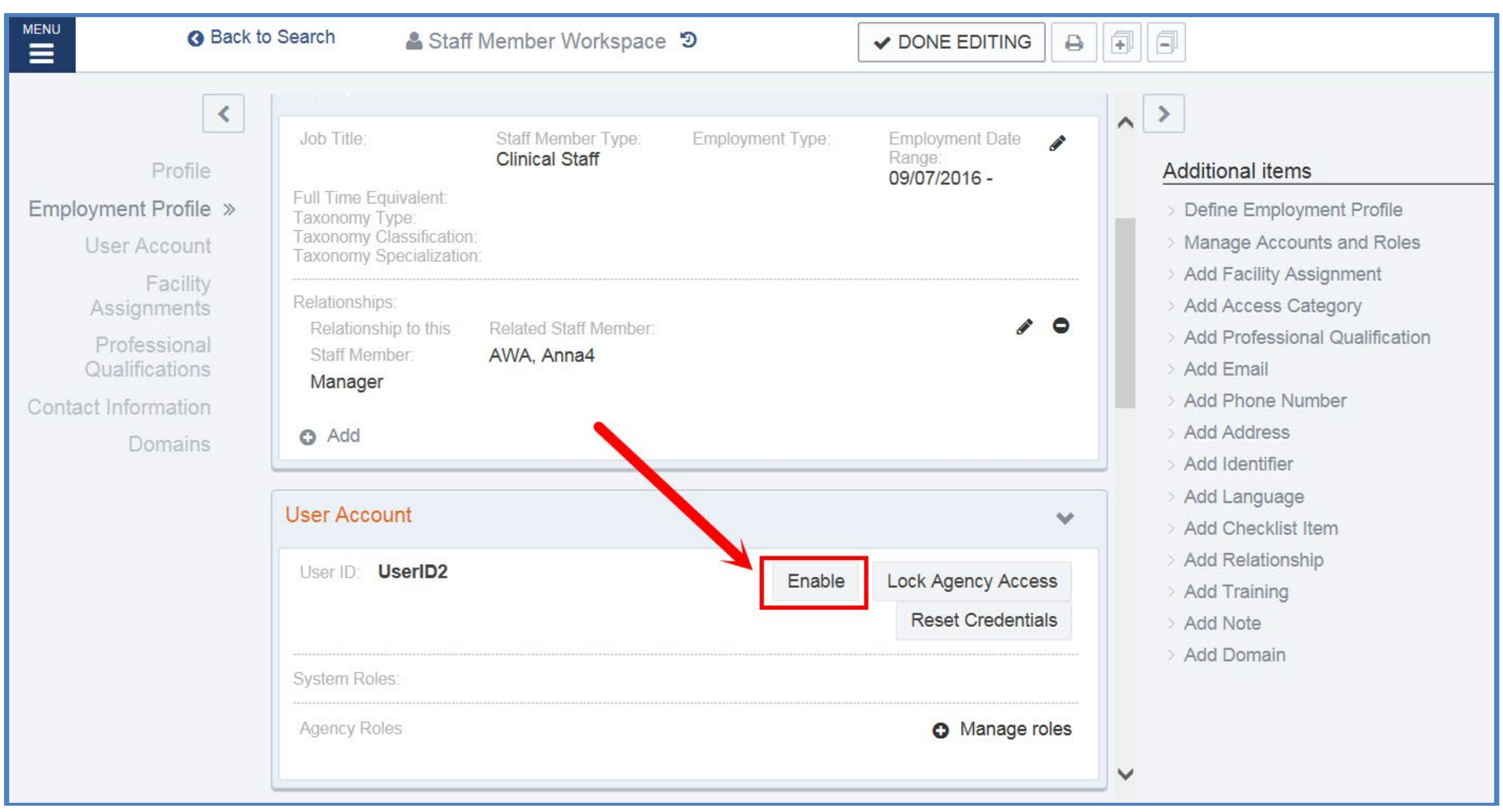
4. Enter your search criteria and click **Search**. The system returns any records that match the search criteria.

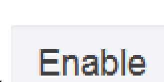
5. Hover over the  and click **View Profile**.



6. Click 

.



7. Scroll to the User Account section and click 

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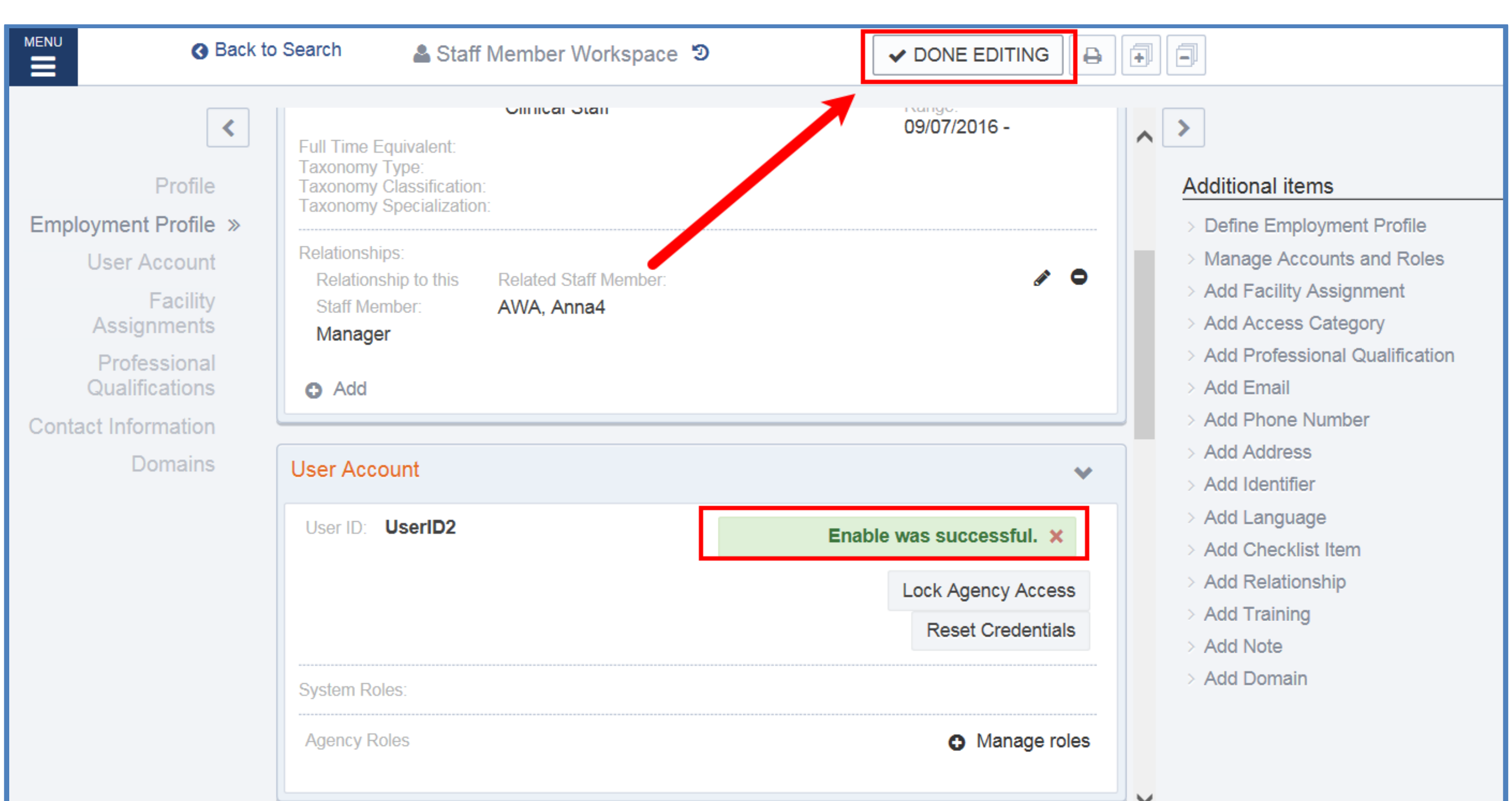


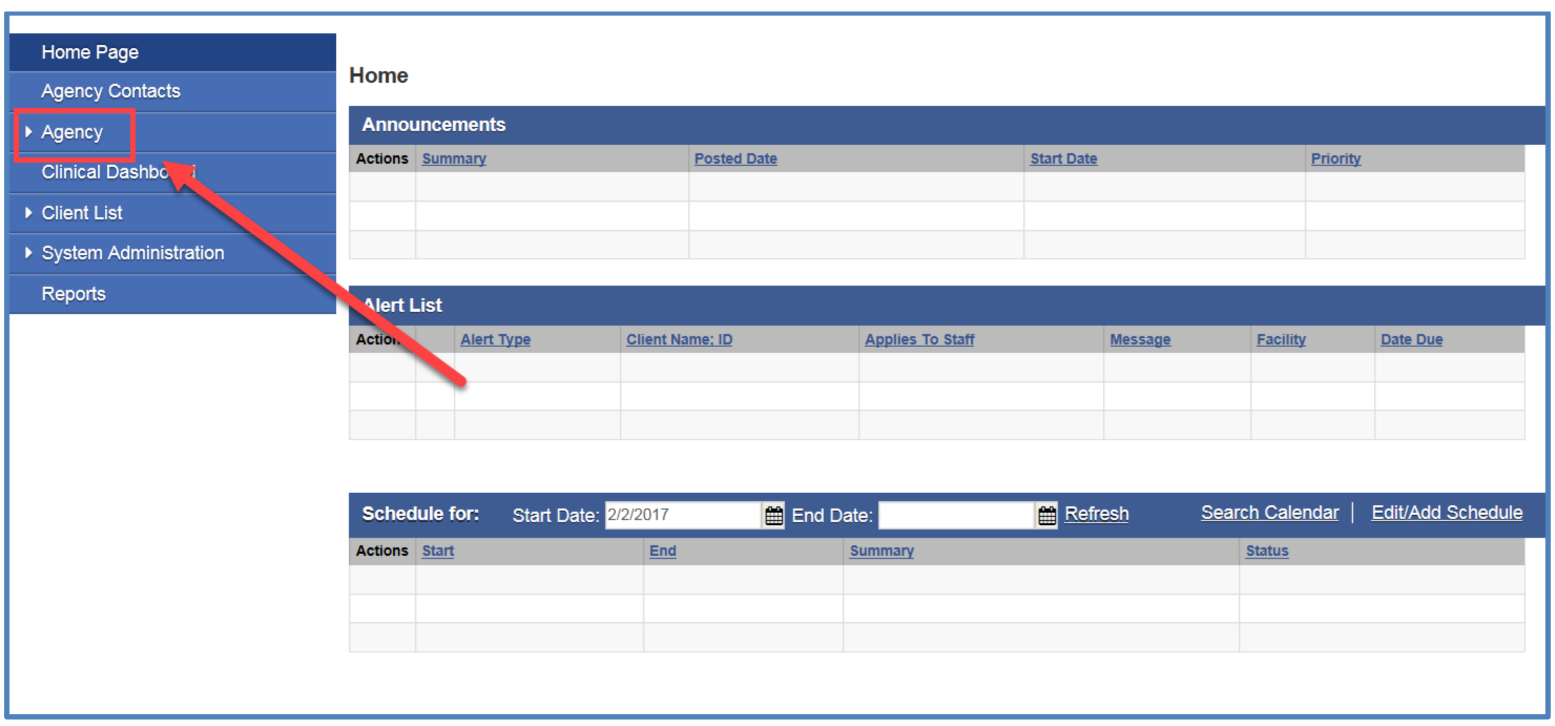
8. The Enable button is no longer available and a message will appear in green letting you know the Enable was successful. Click ✔ DONE EDITING.

Resetting a Staff Member's Passwords/PINs (Credentials)

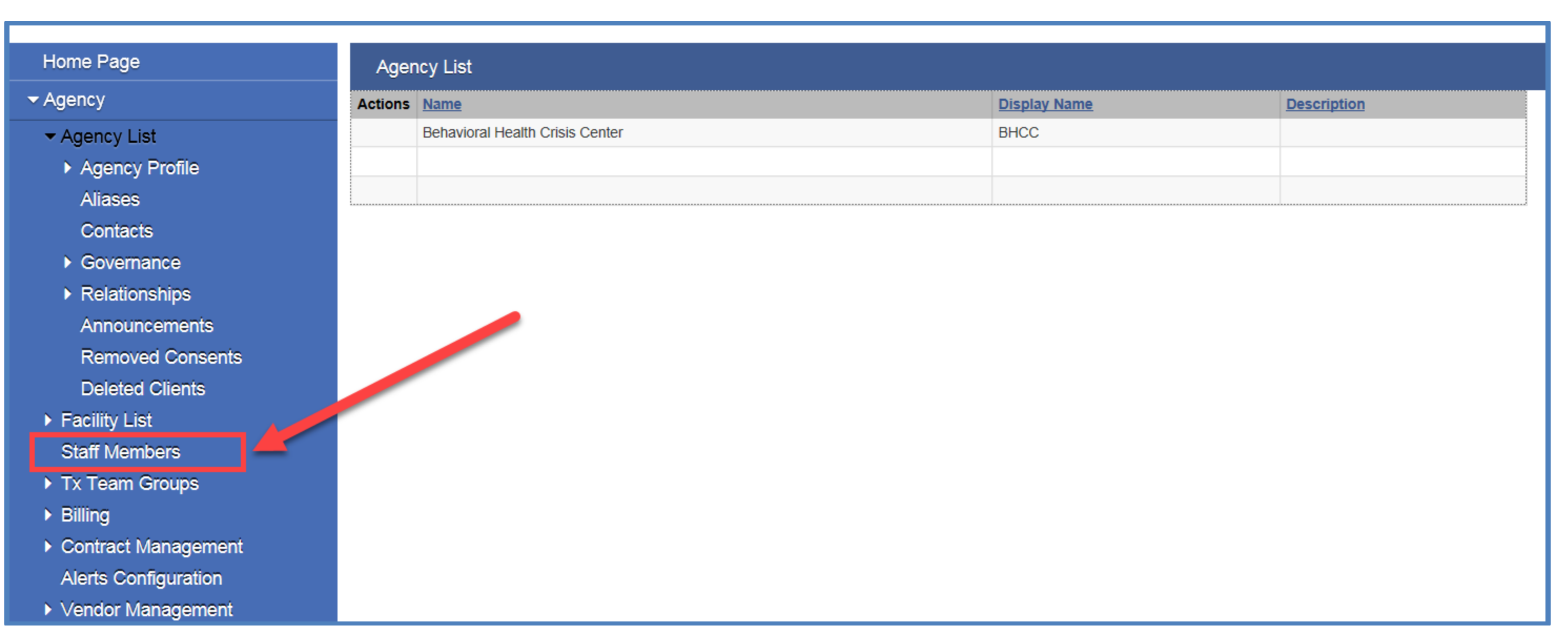
STANDARDS Only AWAs, staff with the appropriate permissions, or WITS Help Desk staff are able to reset credentials for multiple staff in your agency.

TIPS A staff member's Credentials (password and pin) may also be reset from within the Staff Profile, under the User Account section.

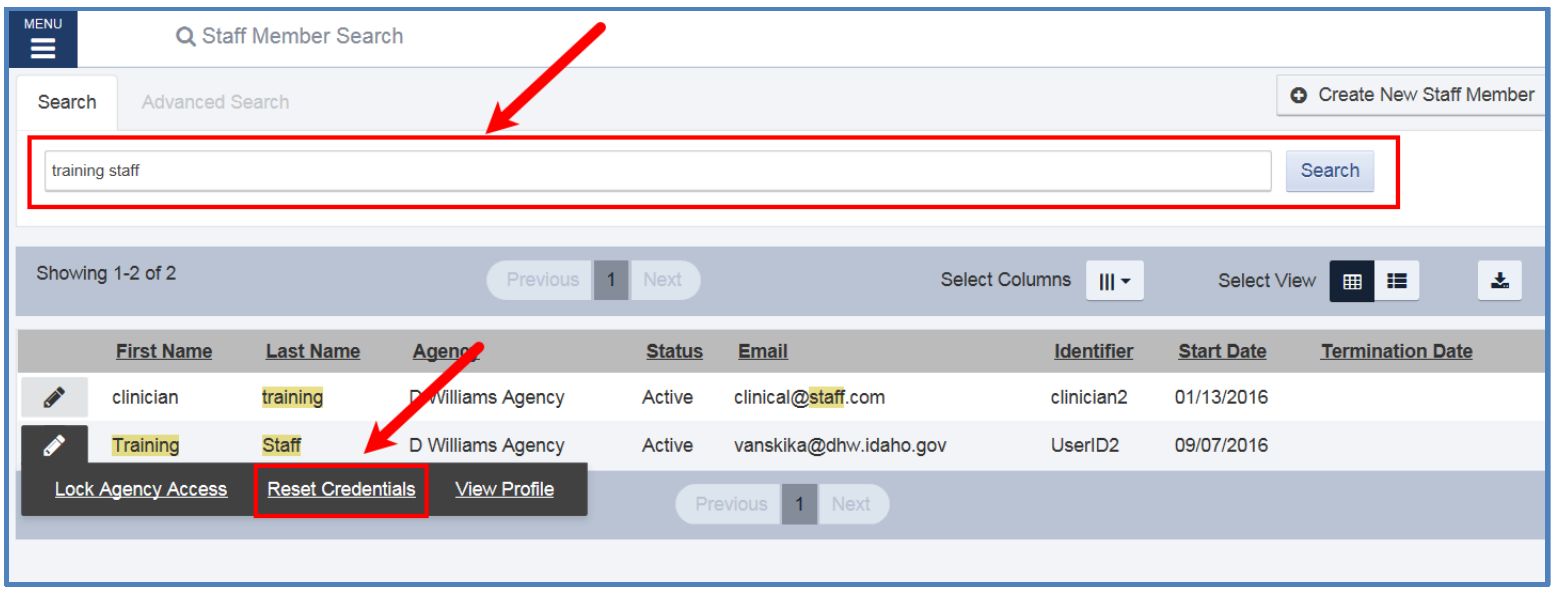
1. Begin on the Home Page.



2. Click Agency on the blue navigation pane.

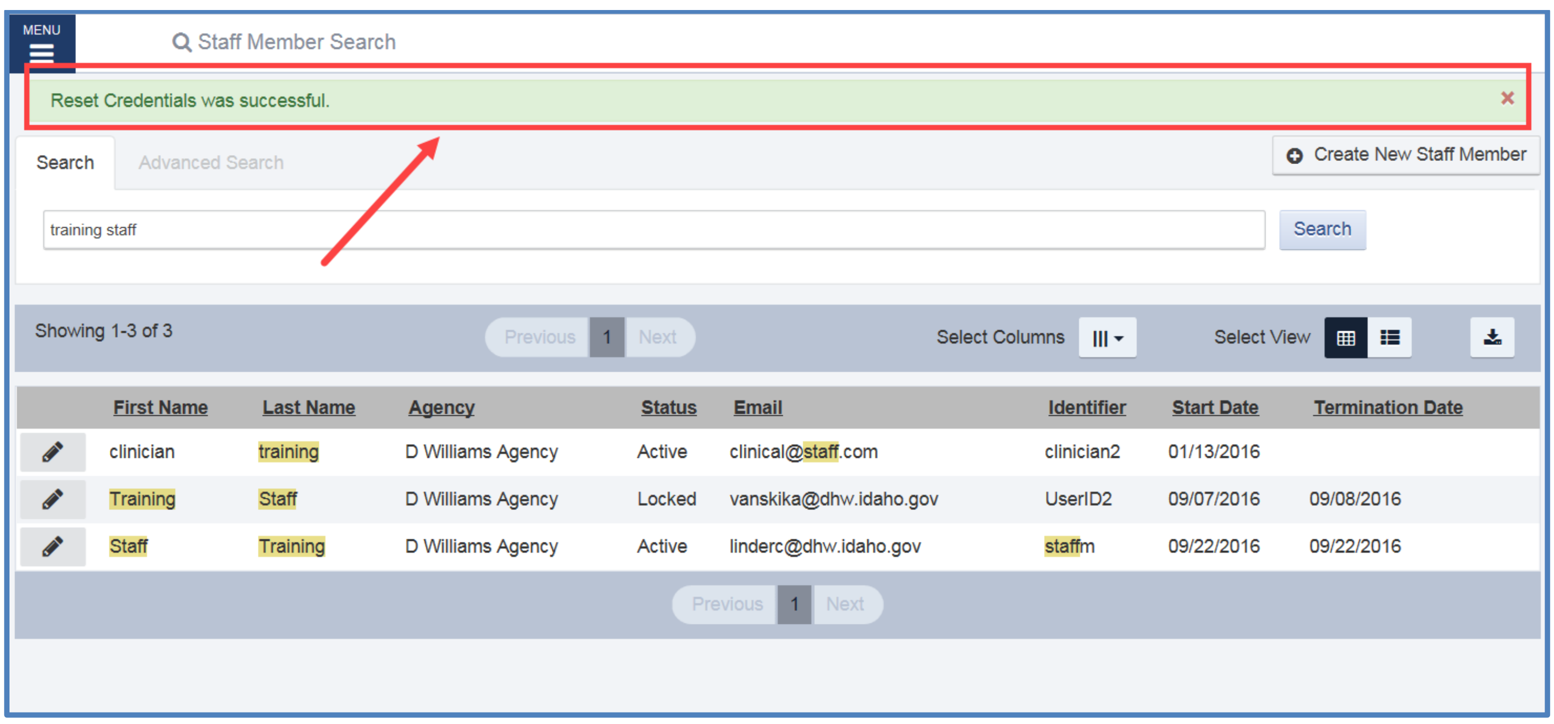


3. Click Staff Members on the blue navigation pane.



4. Enter your search criteria and click Search. The system returns any records that match the search criteria.

5. Hover over the  and click Reset Credentials.



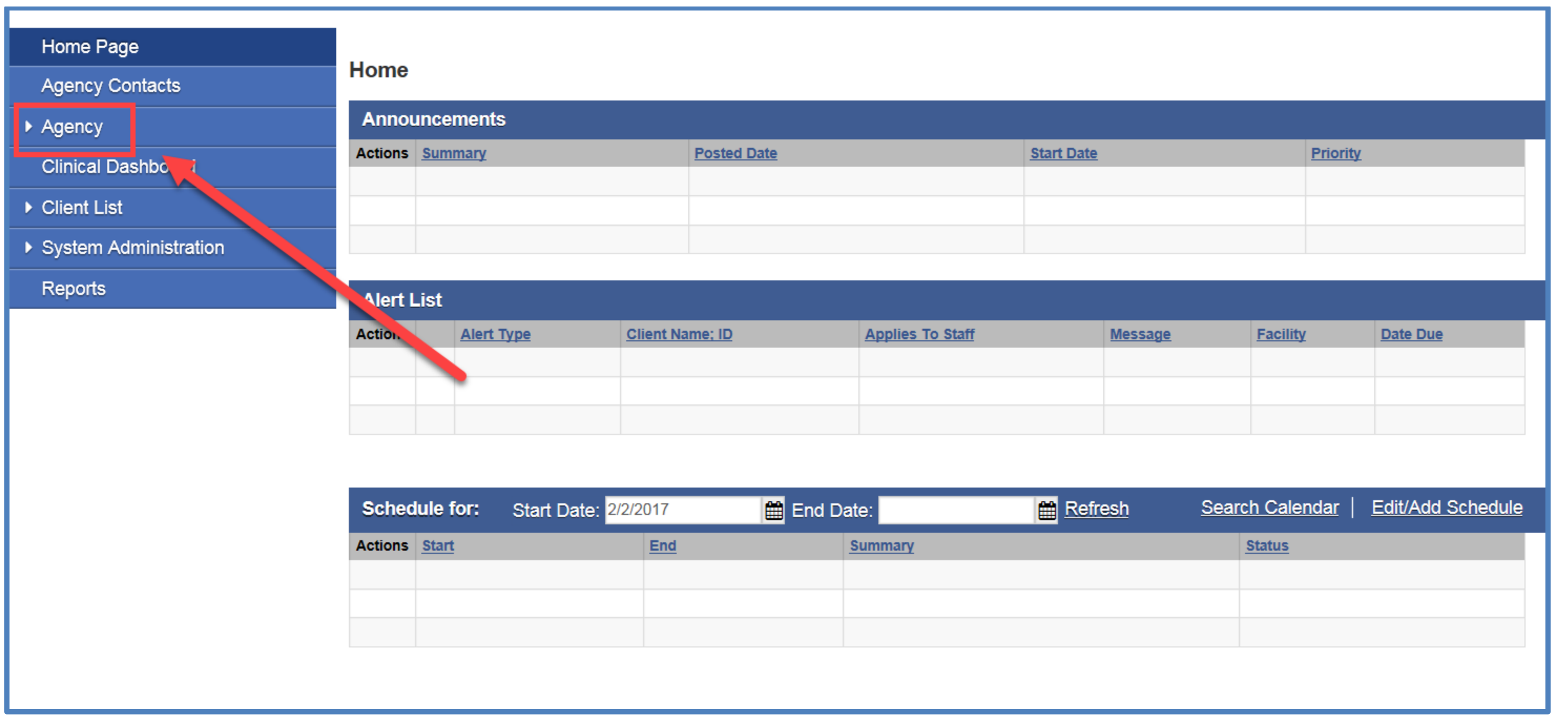
6. An email is automatically sent to the staff member's primary email address with a link to reset their password and pin. A message will appear in green letting you know the Reset Credentials was successful.

Unlocking a Staff Member's WITS Account

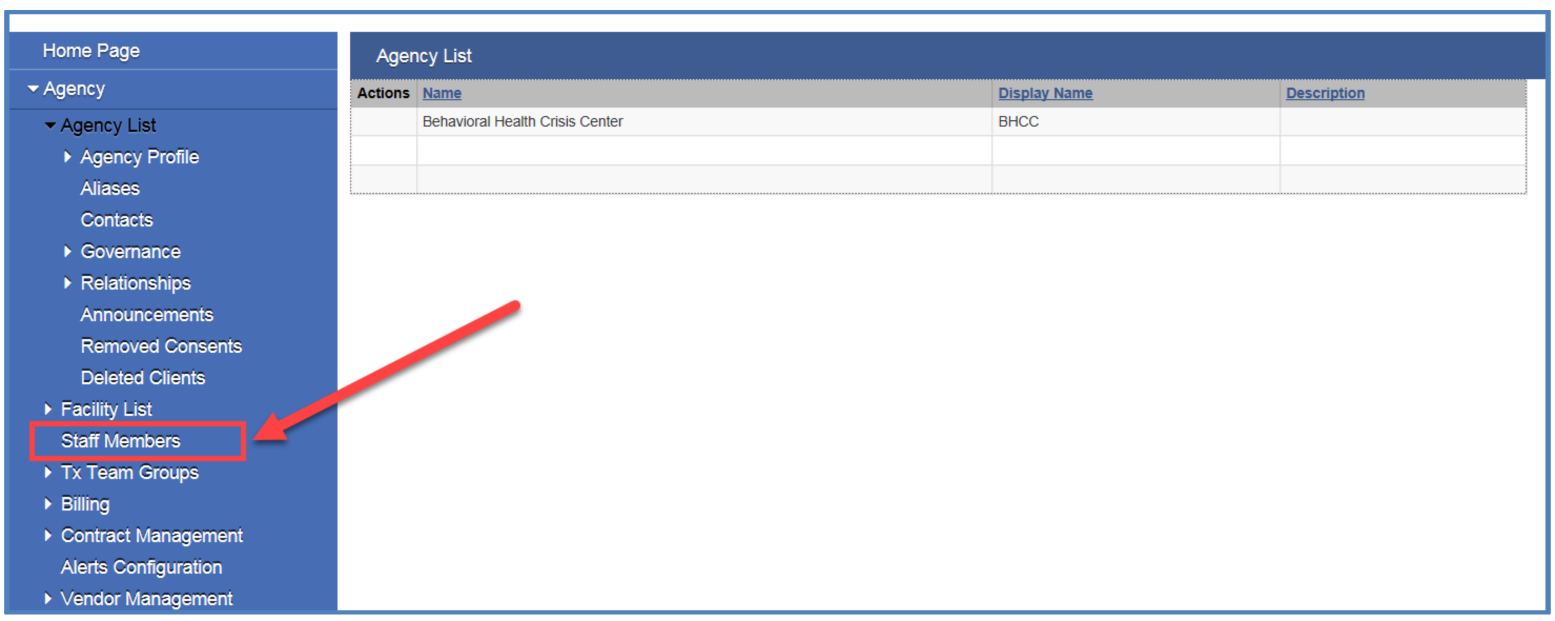
A staff member's account will be locked if the person is logged into WITS and closes the window without logging out. When an account is locked, the staff person will not be able to access WITS. Only AWAs, staff with the appropriate permissions, or WITS Help Desk staff are able to unlock staff accounts.

A staff member's Credentials (password and pin) may also be unlocked from within the Staff Profile, under the User Account section.

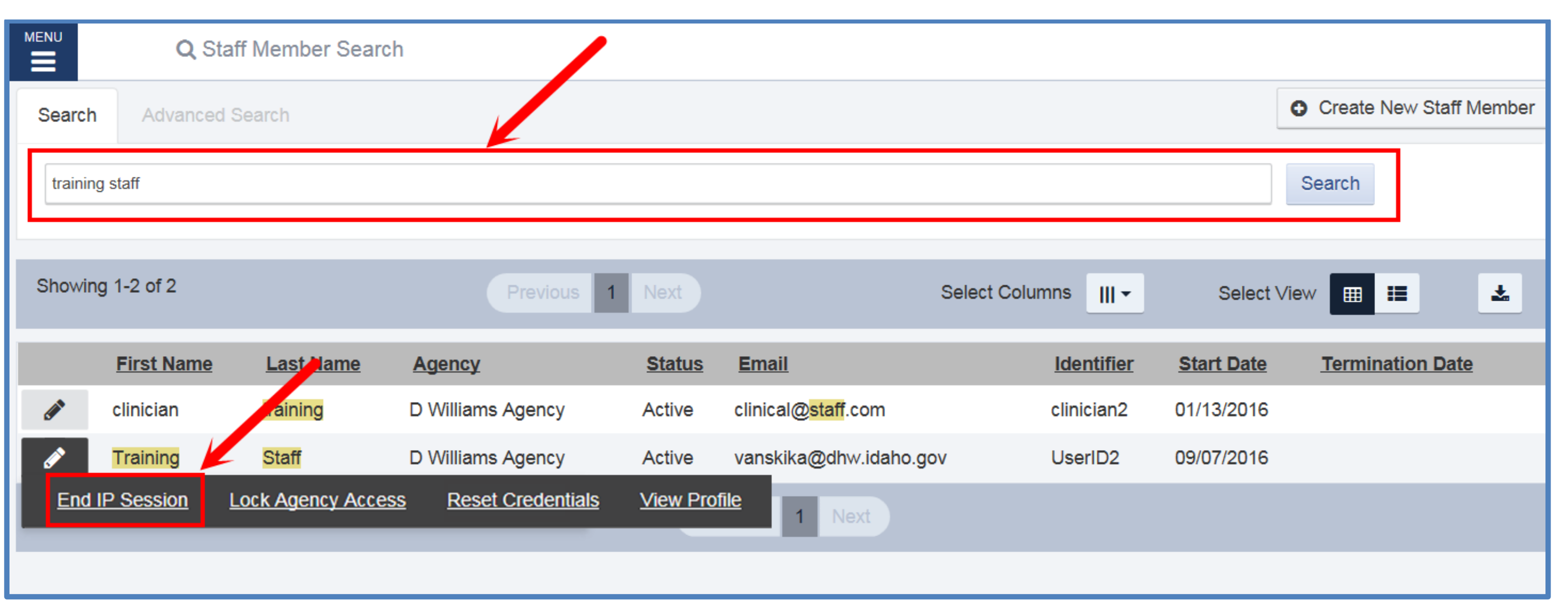
1. Begin on the Home Page.



2. Click Agency on the blue navigation pane.

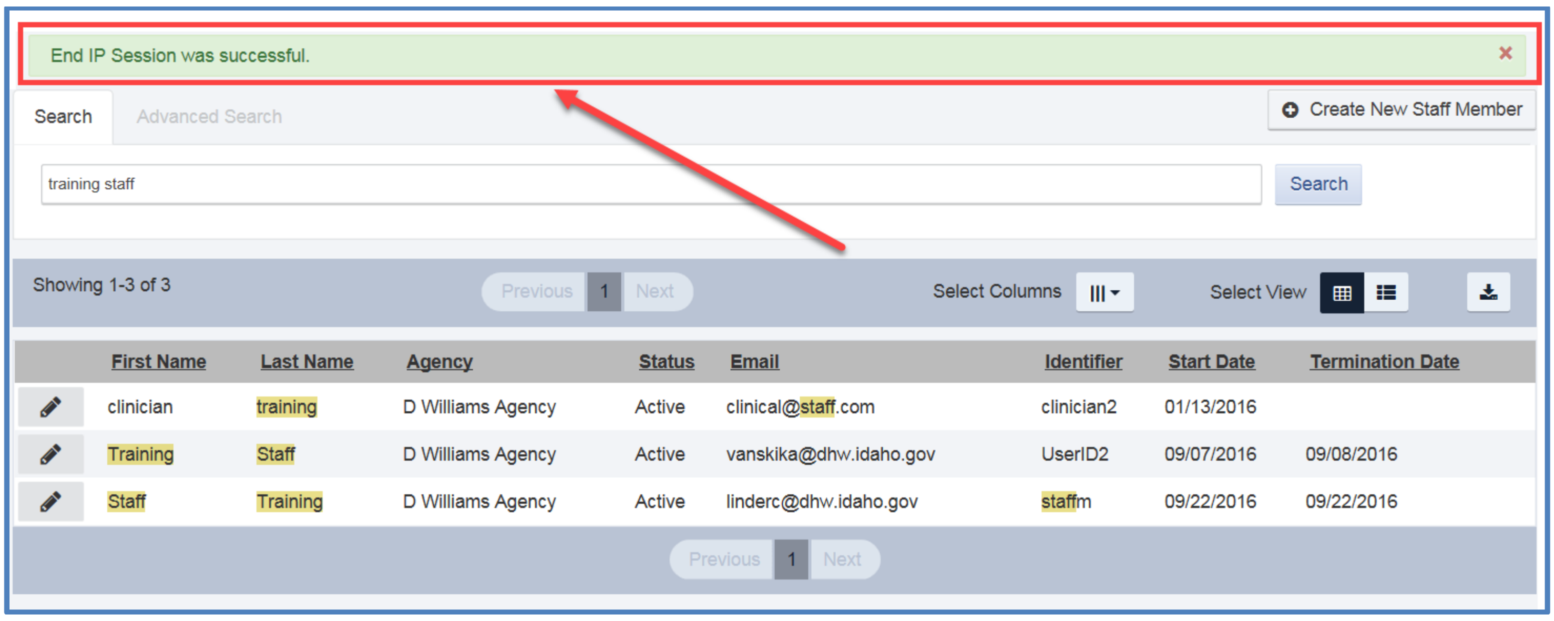


3. Click Staff Members on the blue navigation pane.



4. Enter your search criteria and click Search. The system returns any records that match the search criteria.

5. Hover over the pencil icon and click End IP Session.



6. A message will appear in green letting you know that the End IP Session was successful.

Process & Instructions for a New WITS Staff Account

Create and submit an Account Administration Support Ticket in WITS and attach the signed Idaho WITS User Agreement within five (5) business days of creating the WITS staff member account.

1. Make sure the staff member has read and signed the Idaho WITS User Agreement.
2. Create the staff member's WITS account.
   a. Assign roles to the staff member's account using the BHCCC Staff Roles. Give staff the level of access (permissions) required to perform their job. Do not give any roles that are not necessary to complete their job.
3. Create an Account Administration Support Ticket in WITS within five (5) business days of creating the WITS staff member account.
   a. Include the following information in the Description field of the Support Ticket:
      - Staff Member's first and last name
      - Document requests for elevated permissions. For example, you may request a staff member other than the AWA to also have the ability to reset passwords/PINs.
   b. Attach a copy of the signed Idaho WITS User Agreement.
   c. Submit the Support Ticket to the WITS Help Desk for processing (click Submit to WITS Admin).

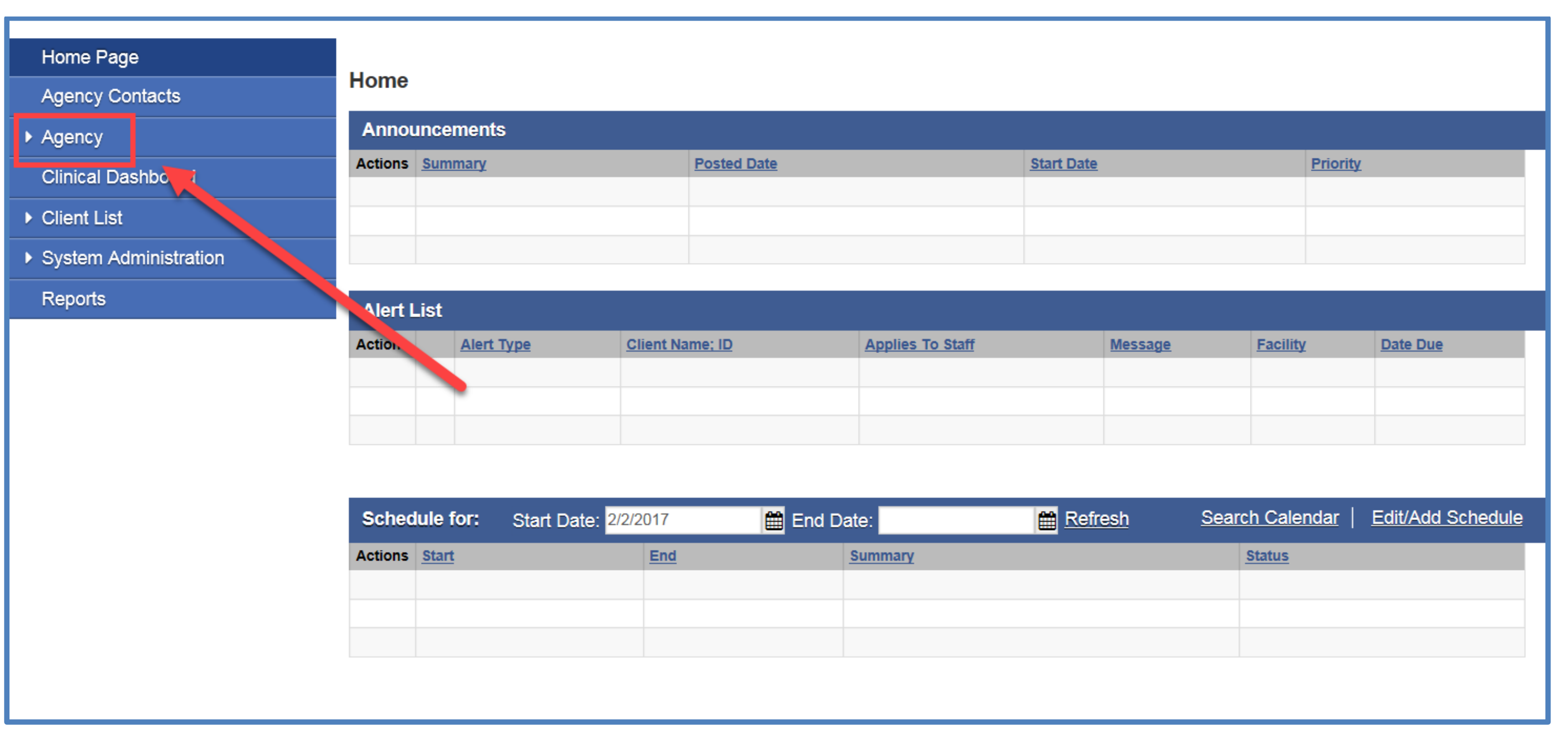
The WITS Help Desk staff will process a Support Ticket within three (3) business days of it being received. When additional information is required, the Support Ticket will be resolved within two (2) business days of receipt of the additional information. When additional information is requested and a response is not received within five (5) business days, the Support Ticket will be closed and the request will not be processed.

Creating a New Staff Member Account

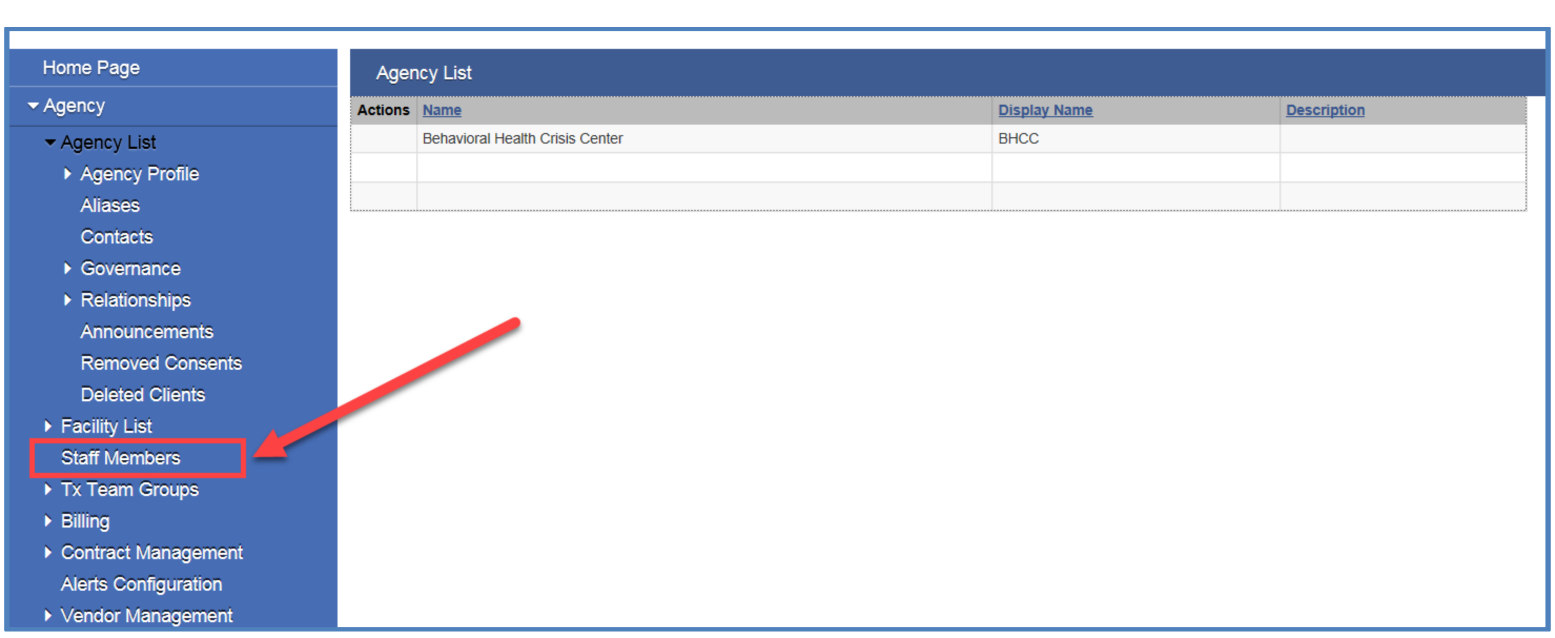
Create and submit an Account Administration Support Ticket in WITS and attach the signed [Idaho WITS User Agreement](#) within five (5) business days of the creation of the WITS staff member account. Complete the sections listed below. Sections and fields not listed below are optional.

- **Profile**
  - **First name**
  - **Last name**
  - **Gender**
- **Employment Profile**
  - **Staff member type**
  - **Staff member start date**
- **User Account**
  - **User ID**
  - **Add Agency Roles**
- **Facility Assignments**
  - **Add Facility Assignments**
- **Professional Qualifications**
- **Contact Information**
  - **Email Address**
- **Domains**
  - **Select Mental Health**

1. Begin on the Home Page.

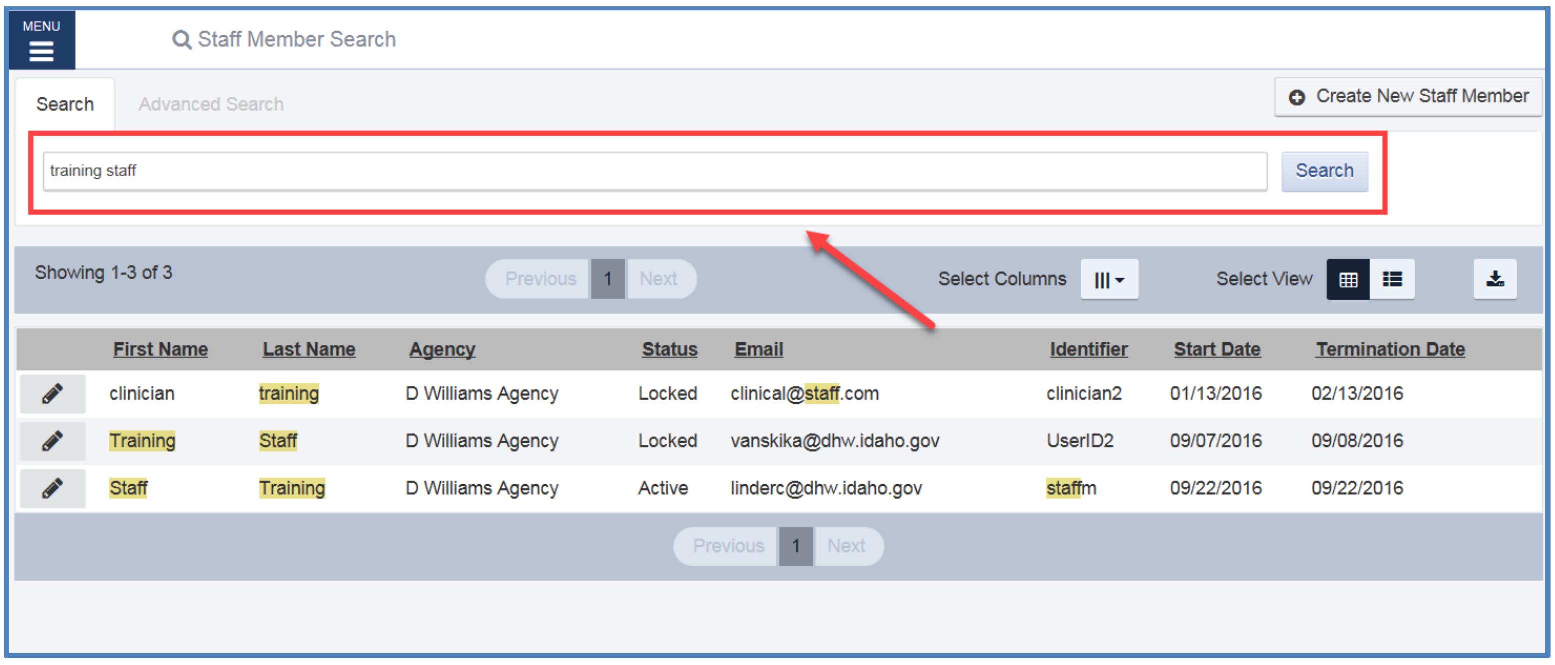


2. Click Agency on the blue navigation pane.

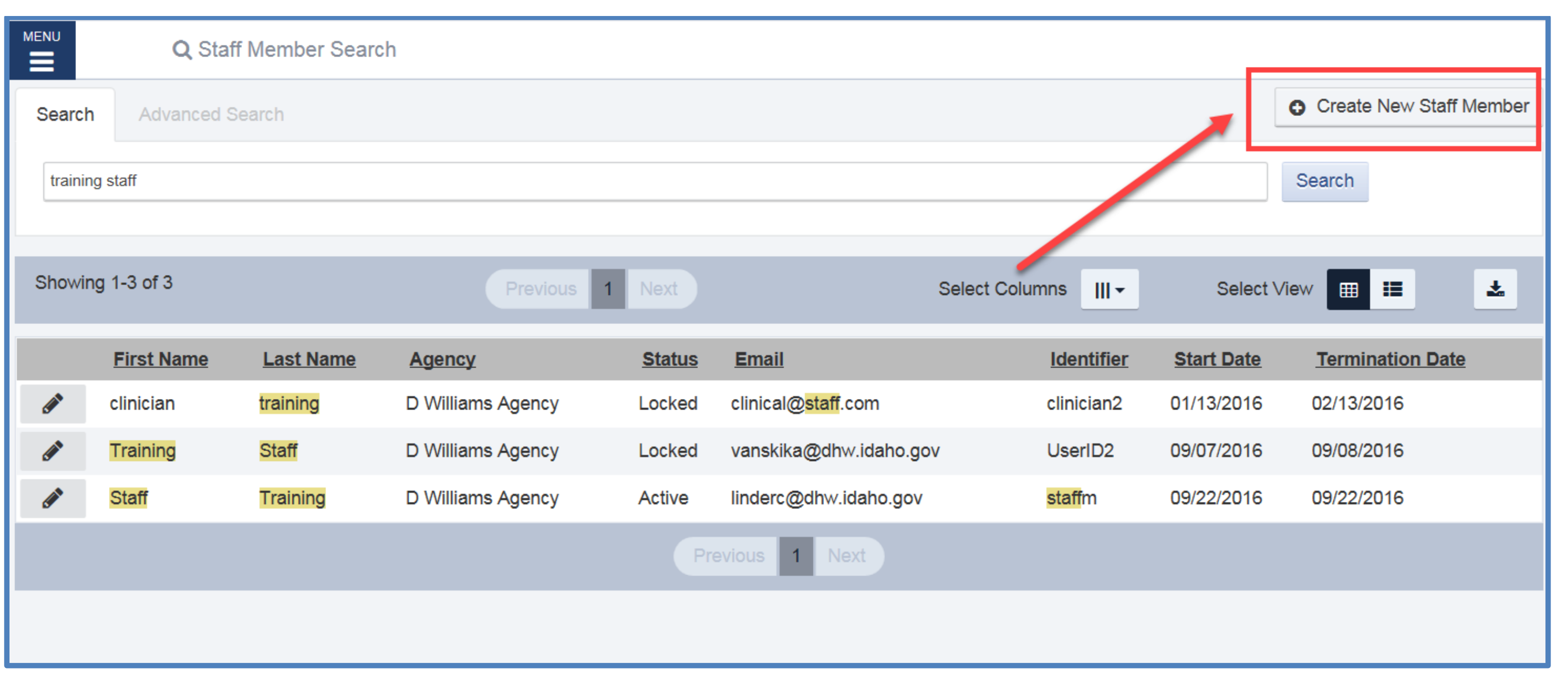


3. Click Staff Members on the blue navigation pane.

Before creating a new staff member account, search for the staff member to confirm they do not already exist in your agency.

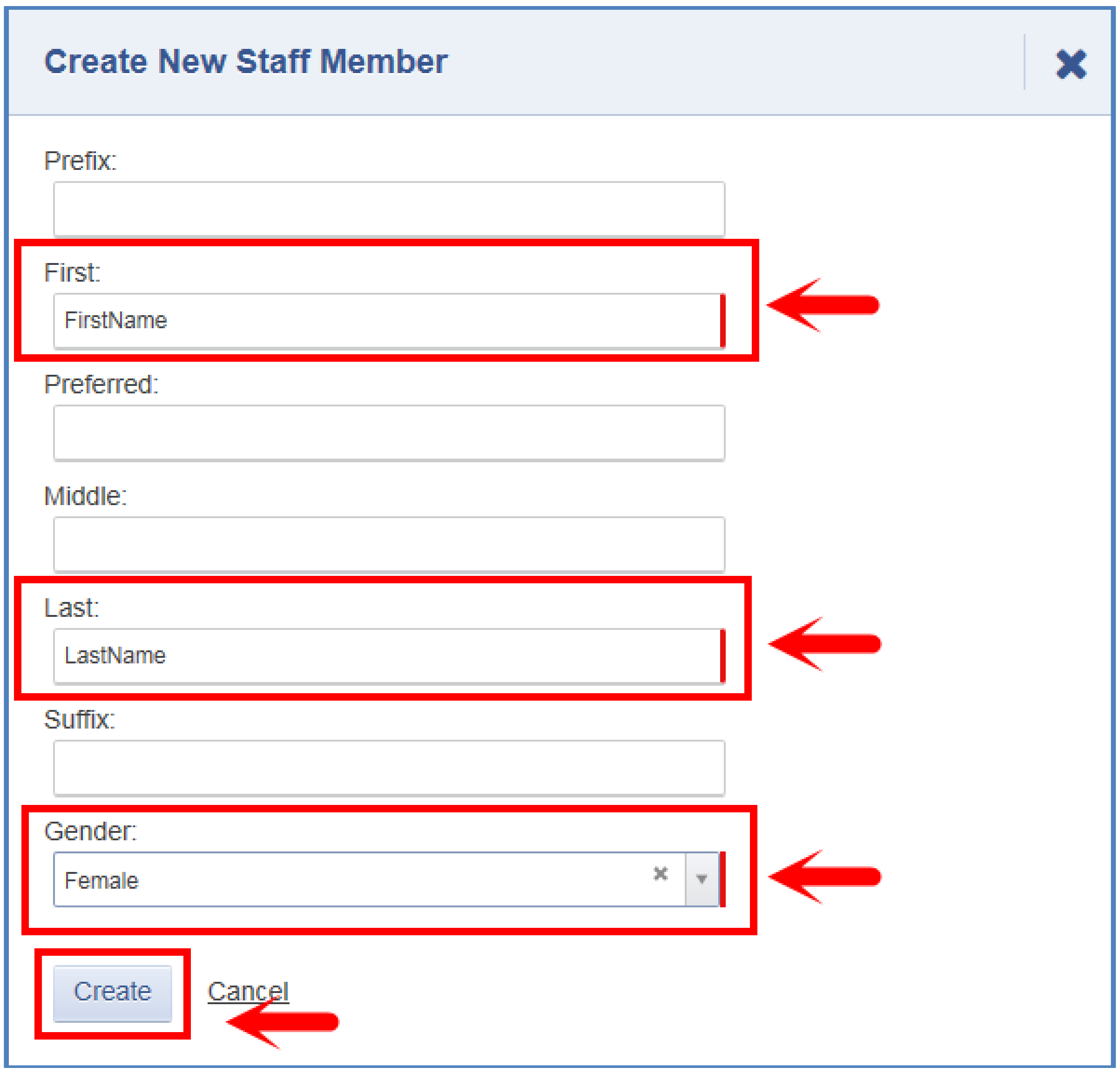


4. Enter your search criteria and click Search. The system returns any records that match the search criteria. Confirm that the staff member does not already exist in your agency.



5. Click Create New Staff Member.

Required items have a red line on the right hand side of the box.



5. Complete the following fields.
    - First Name – enter staff member's first name.
    - Last Name – enter staff member's last name.
    - Gender – select staff member's gender.

6. Click 

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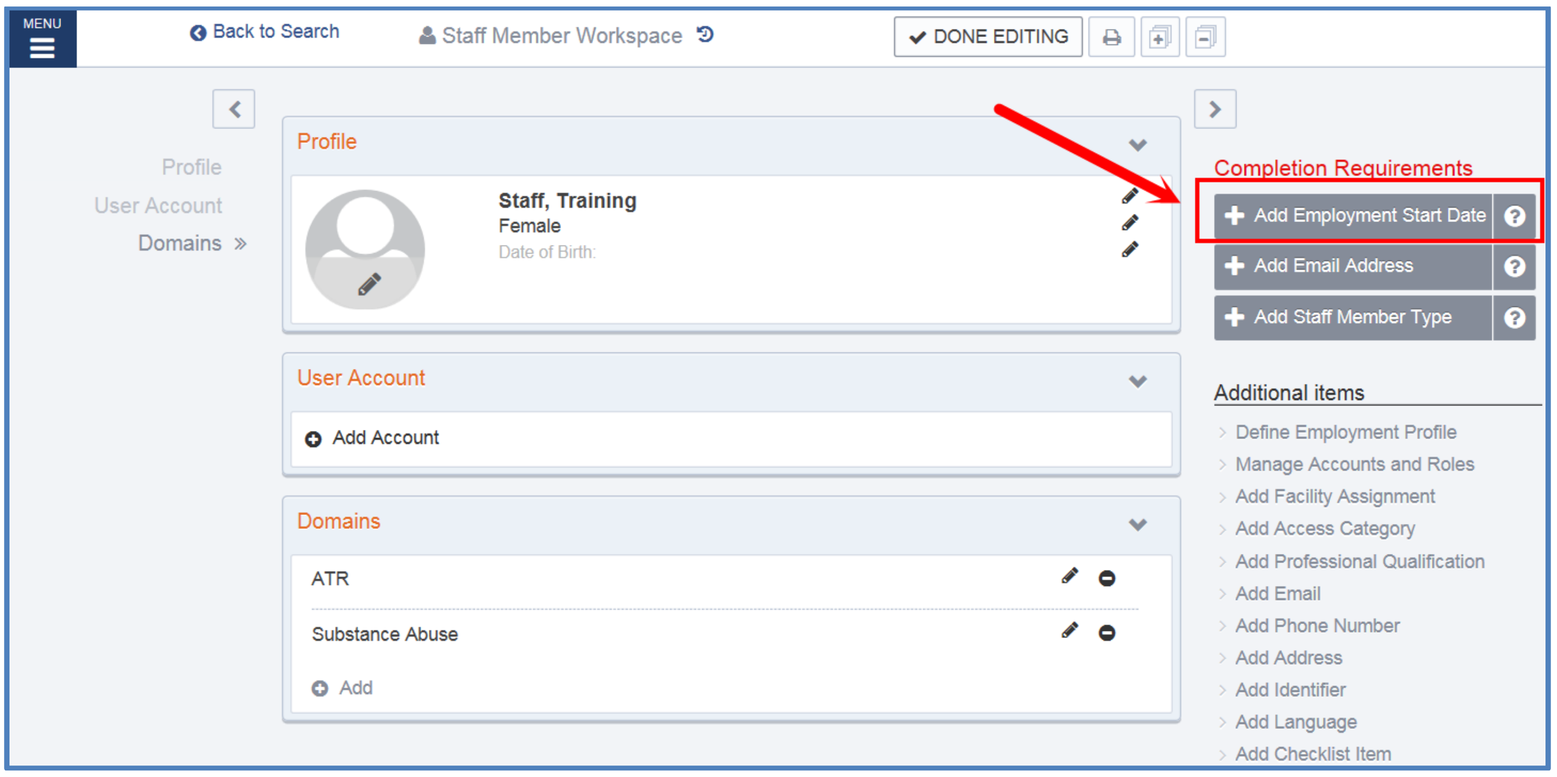

7. Click 

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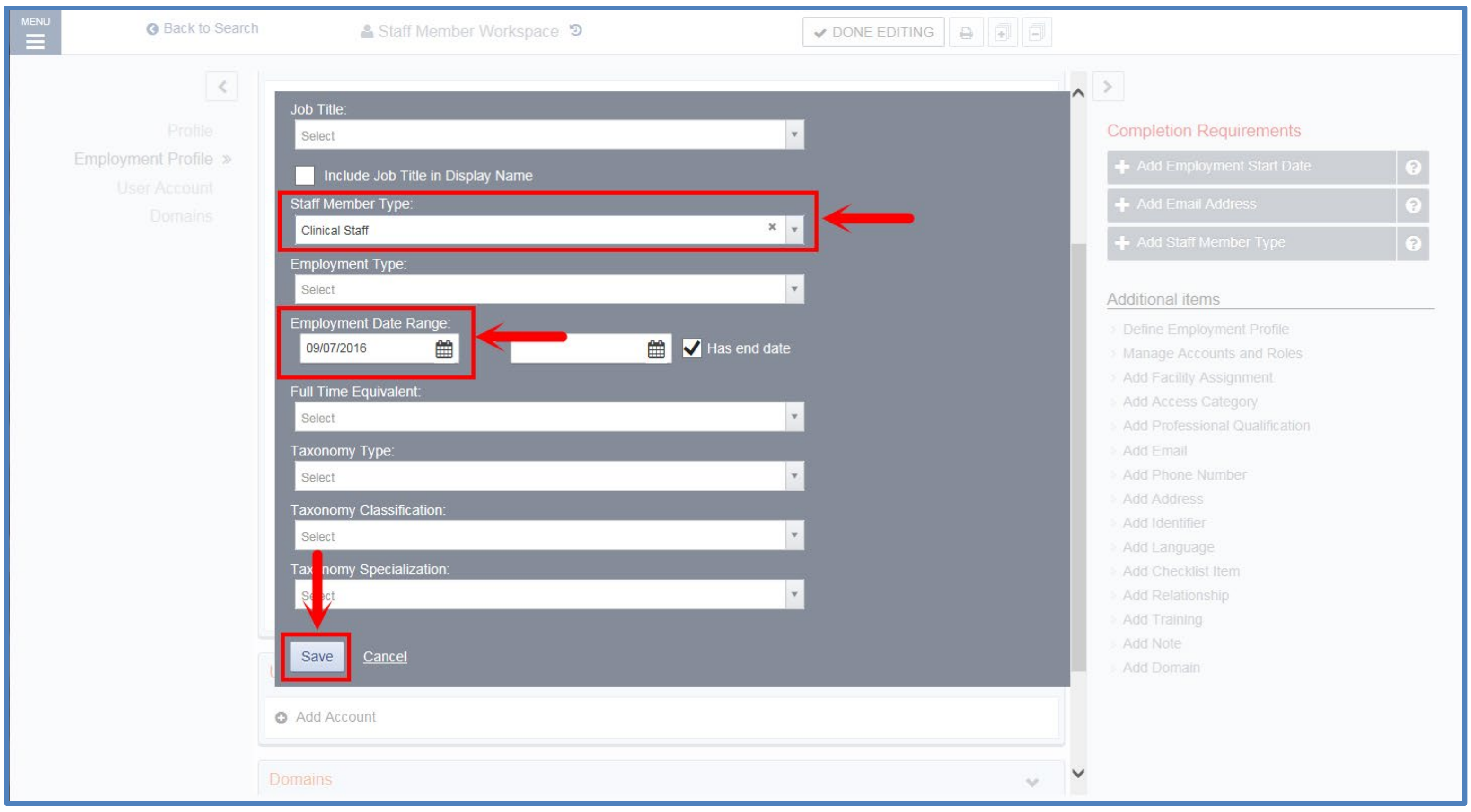
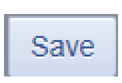
TIPS When creating a new staff account, do not enter an employment end date.



8. Complete the following fields.
   - Staff Member Type – select the staff type.
   - Employment Date Range – enter the start date.

9. Click 

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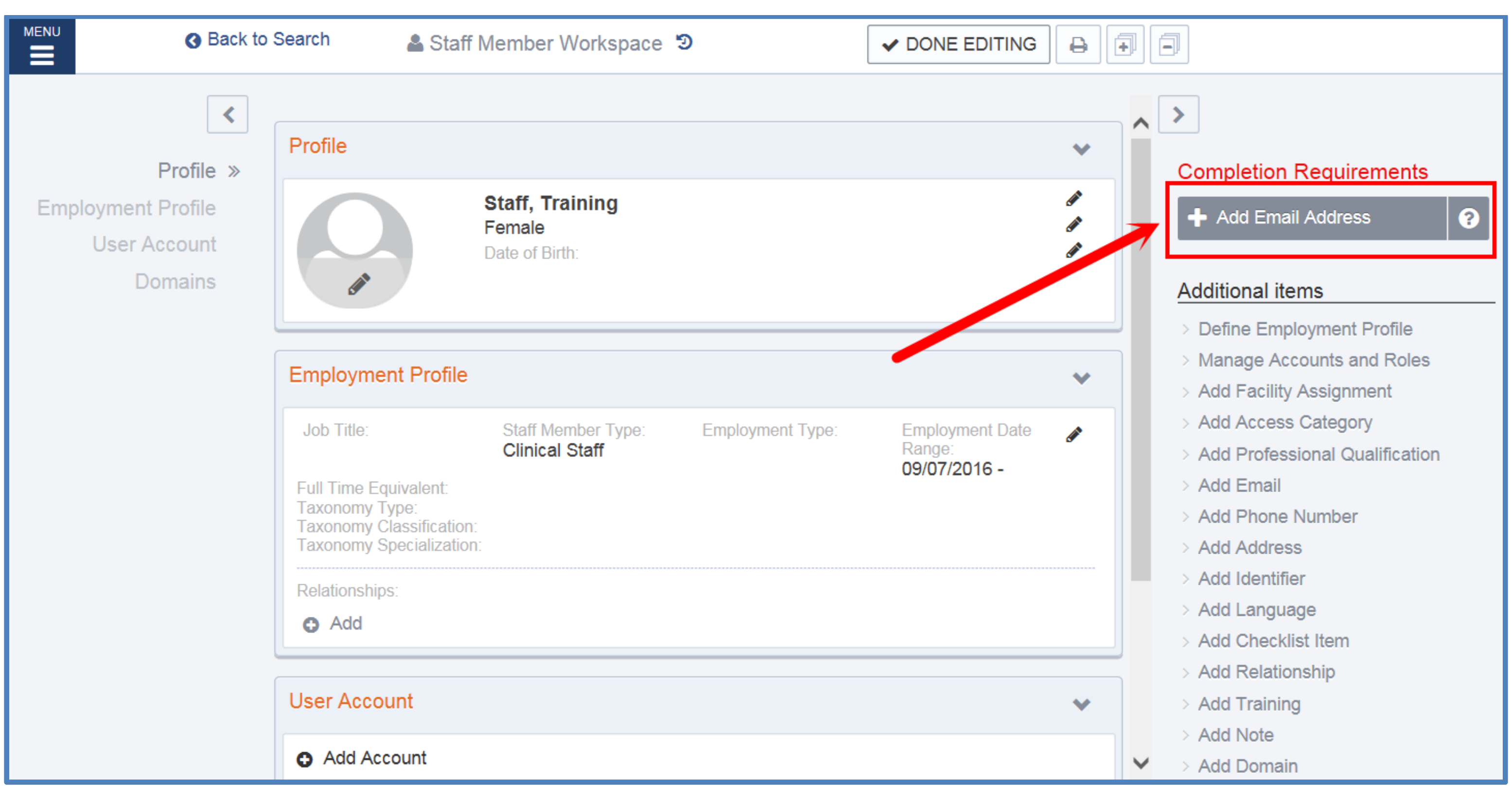
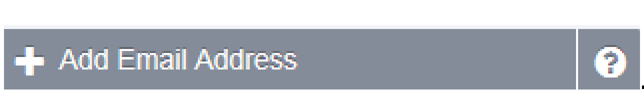


10. Click 

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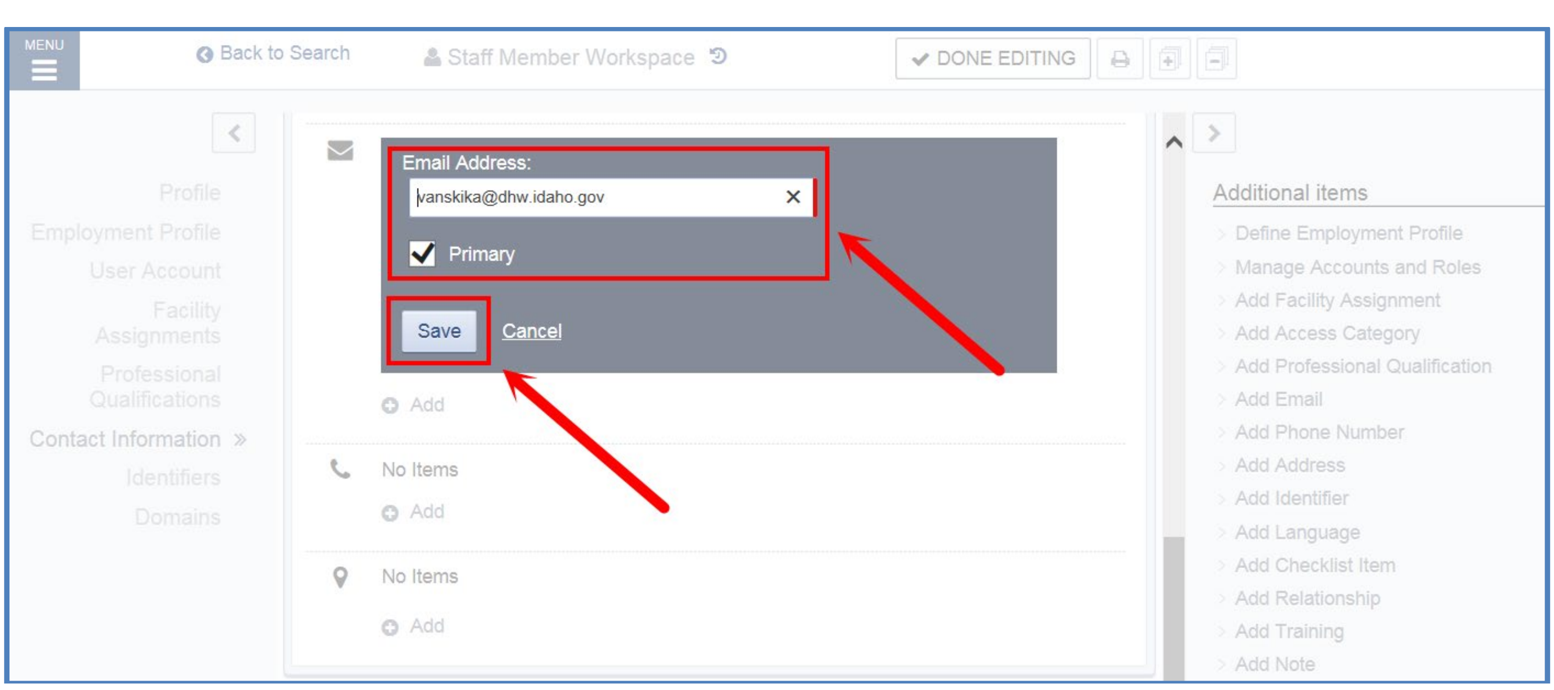
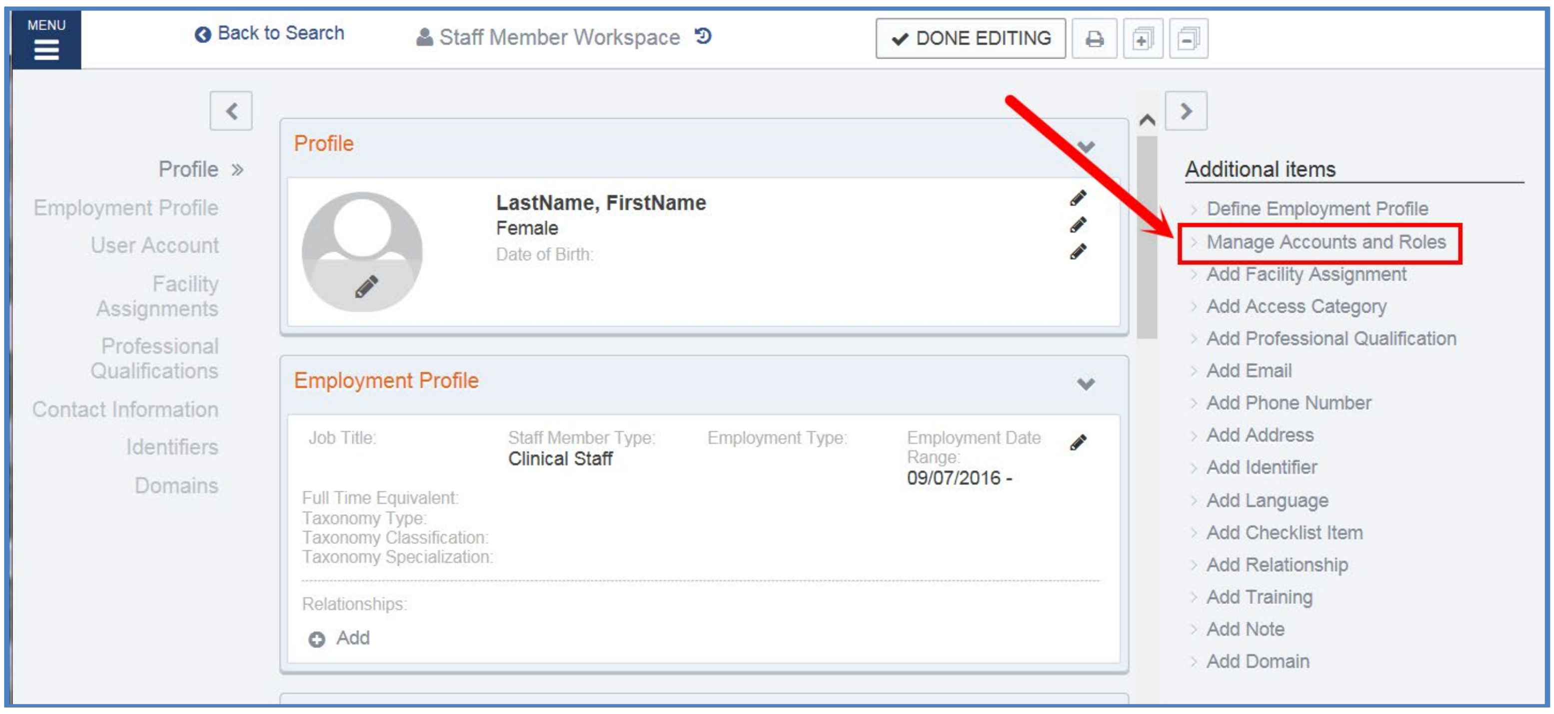
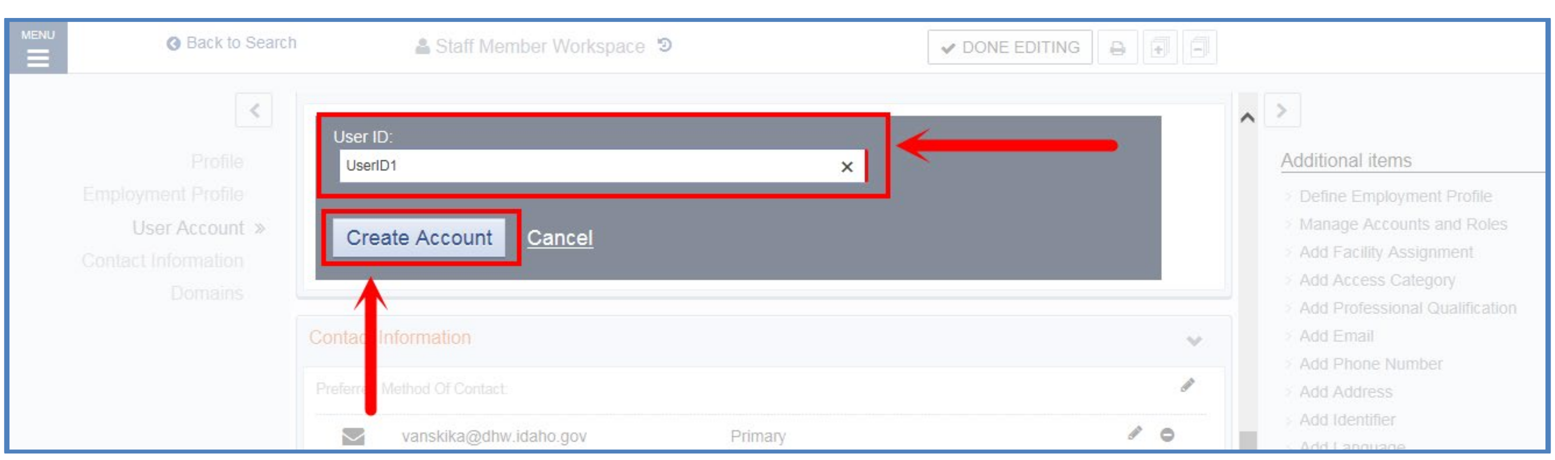


11. Complete the following fields.
    - Email Address – enter the staff member's email address.
    - Primary – check the box to indicate this is the primary email for the staff member.
12. Click Save.

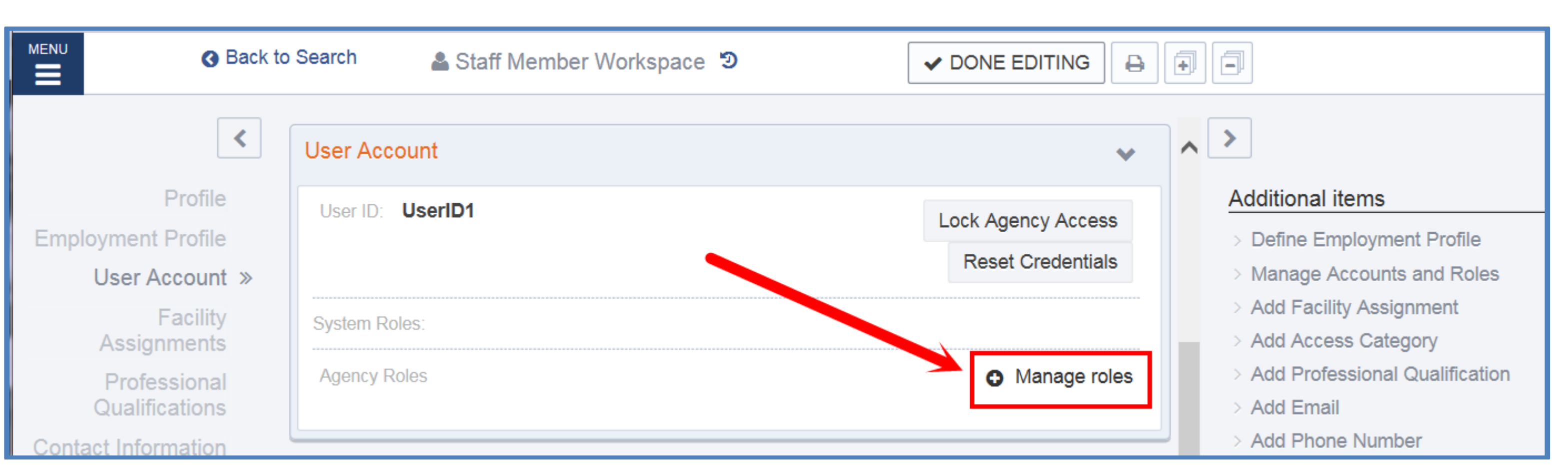


13. Click Manage Accounts and Roles.

Once you create the User ID it cannot be changed in WITS.



14. Complete the following field.
    - User Login ID – enter a user login ID. **The standard is to use the user's last name and first initial. (Ex: John Smith would be smithj).**
15. Click Create Account.

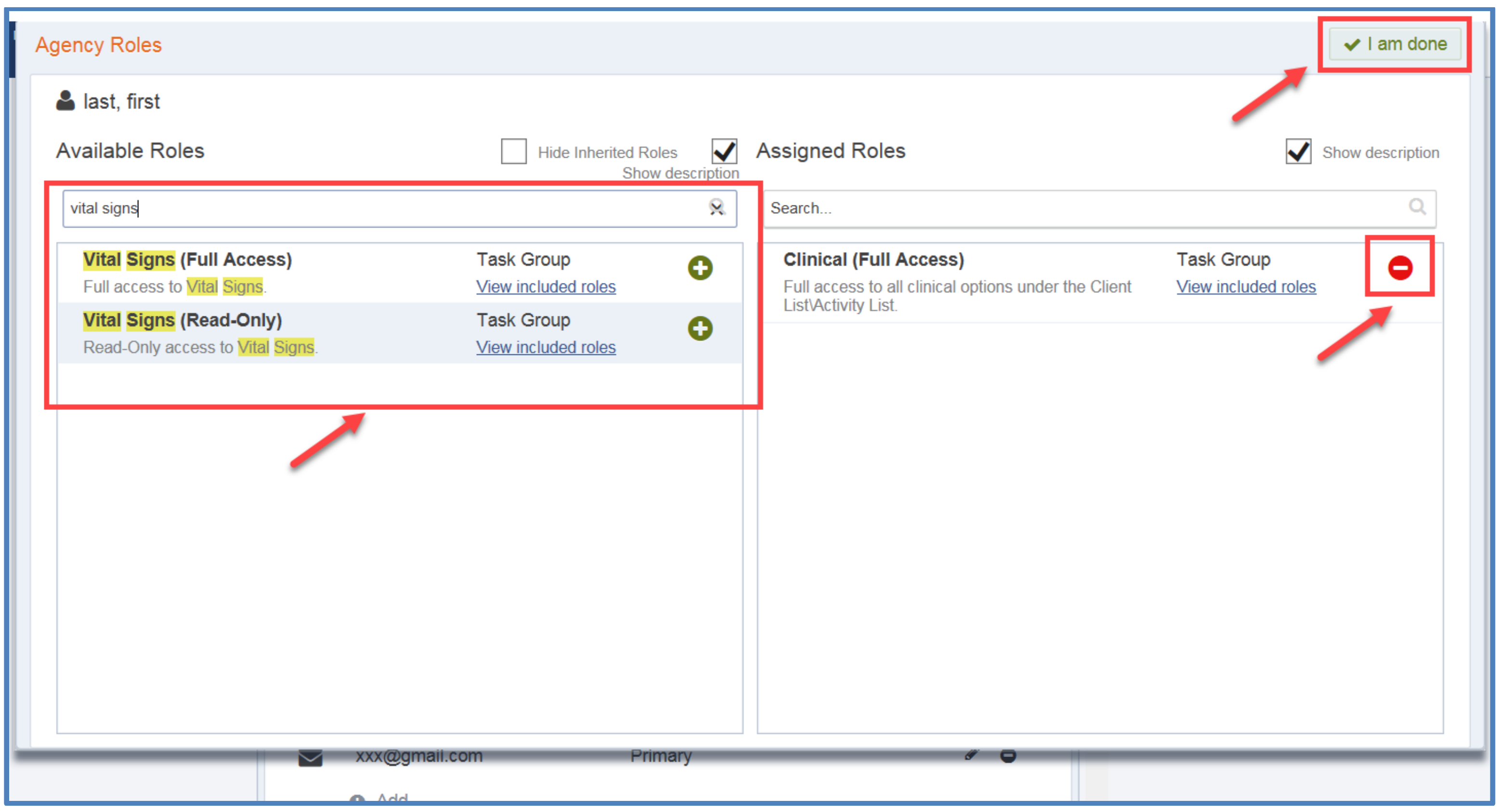


16. Click Manage roles.

Give staff the level of access (permissions) required to perform their job. Do not give any roles that are not necessary to complete their job.

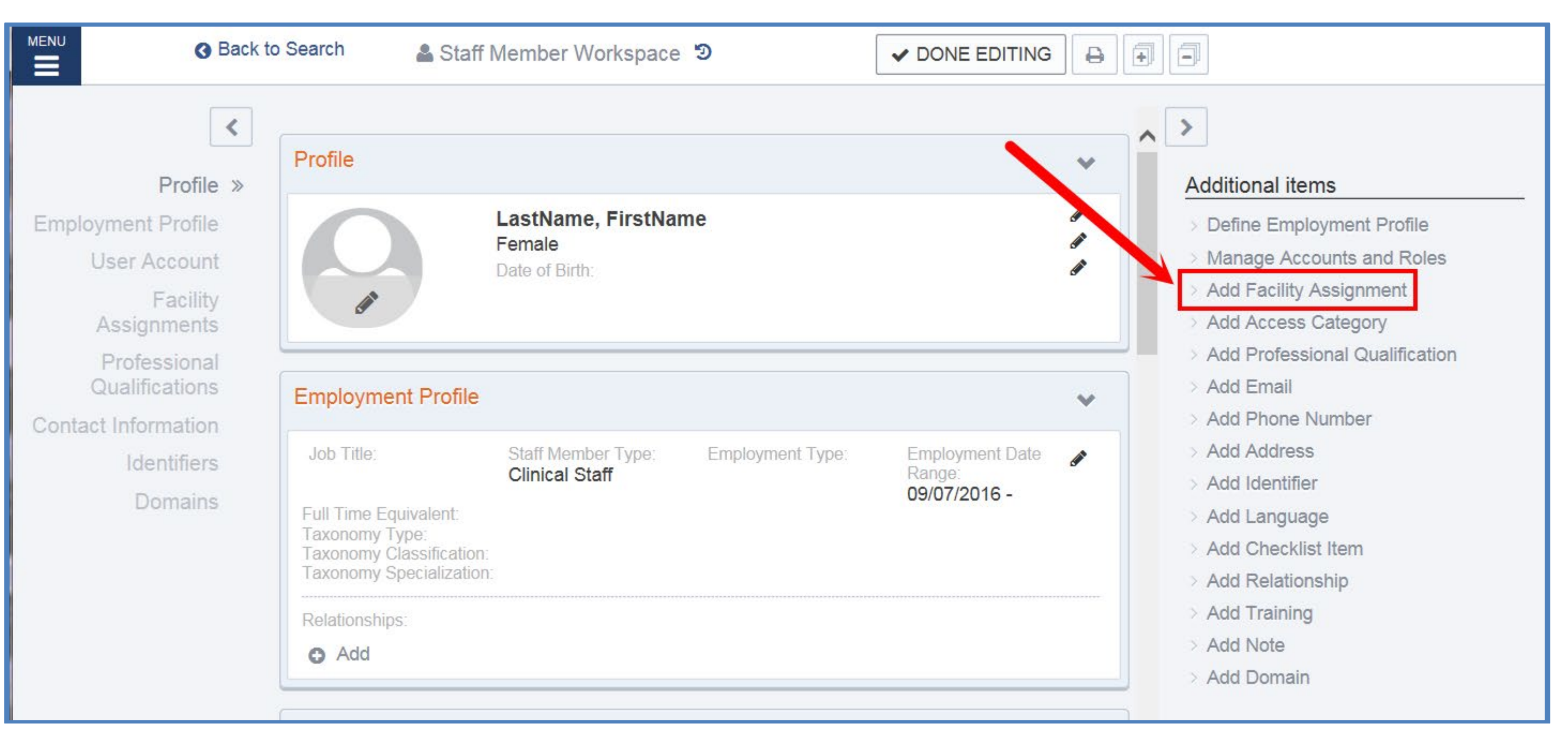
Assign roles to the staff member's account using the BHCCC Staff Roles.

Search for roles by typing in the search bar.



17. Click ⊕ to add each permission from the Available Roles to the Assigned Roles box or click ⊖ to remove permissions from the Assigned Roles.

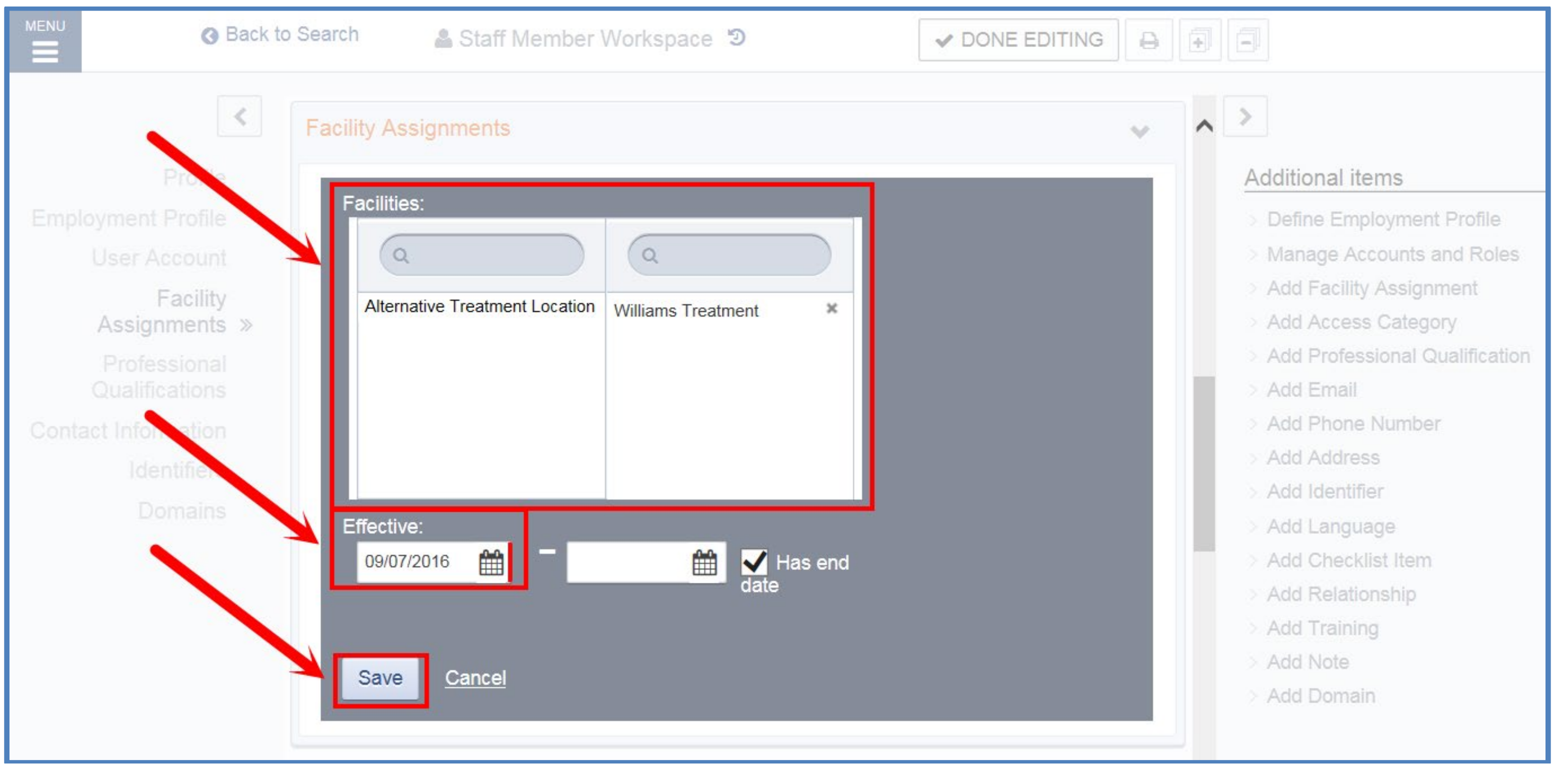
18. Click ✔ I am done once all roles have been added.



19. Click > Add Facility Assignment.

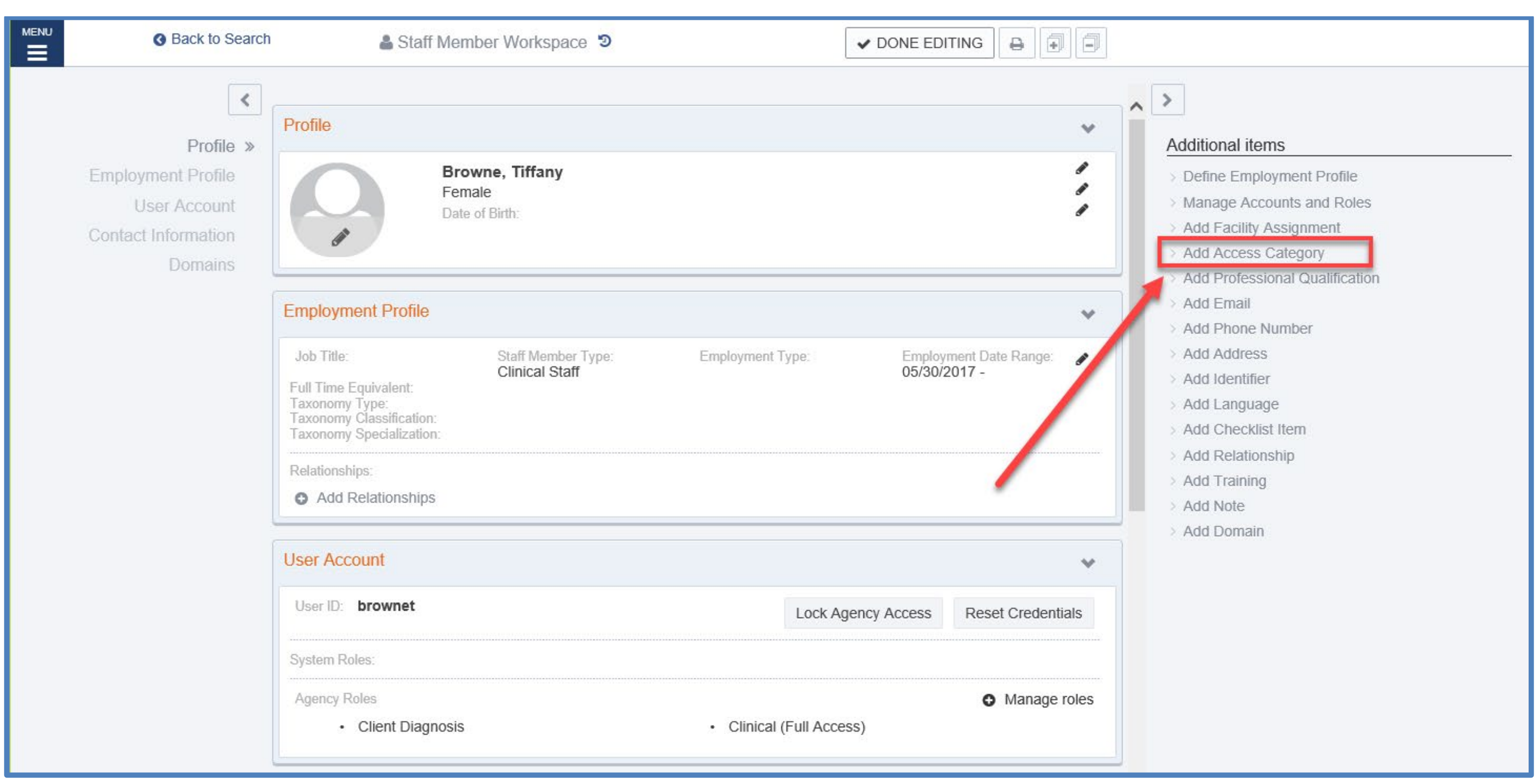
When creating a new staff account, do not enter a facility end date.

TIPS When a facility is listed in the left hand box, a user will not be able to access it.

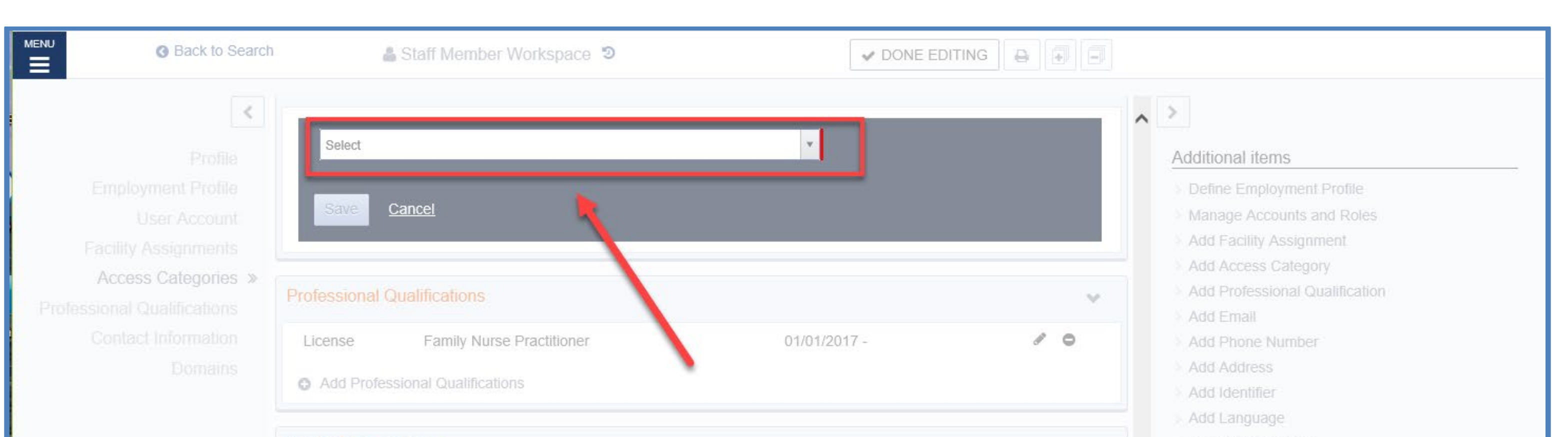


20. Complete the following fields.
    - Facilities – select the facilities your staff need to access. Clicking on them in the left-hand box will move them to the right-hand box, which denotes a selected facility.
    - Effective – enter the start date.

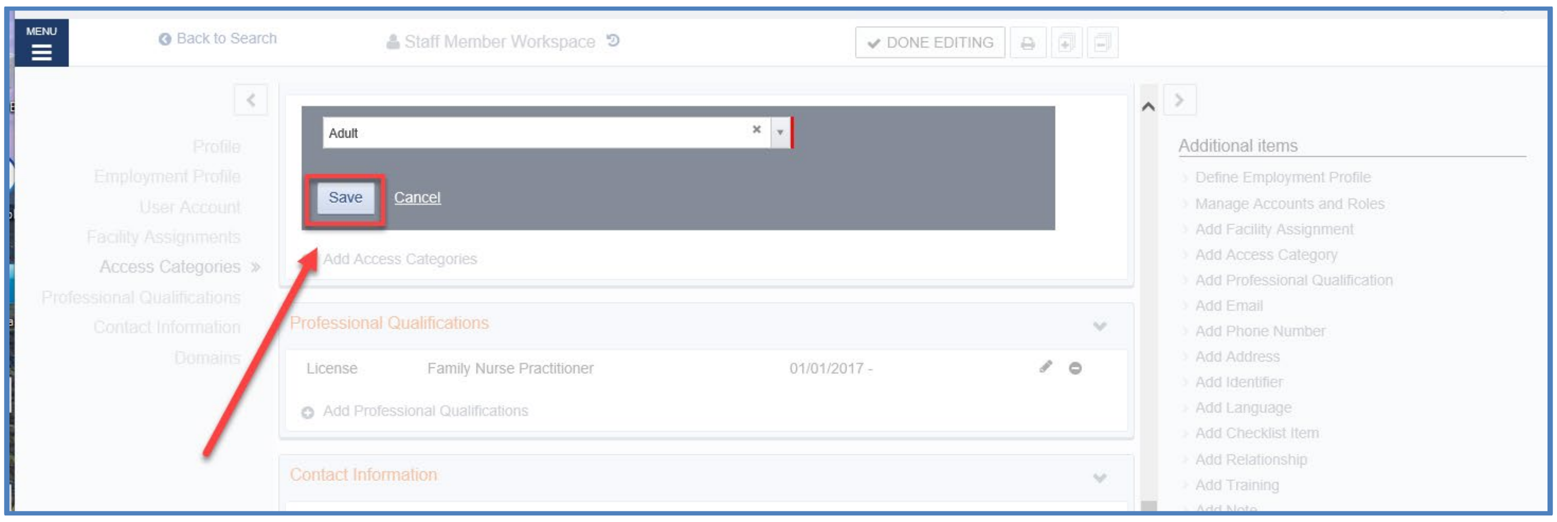
21. Click Save.



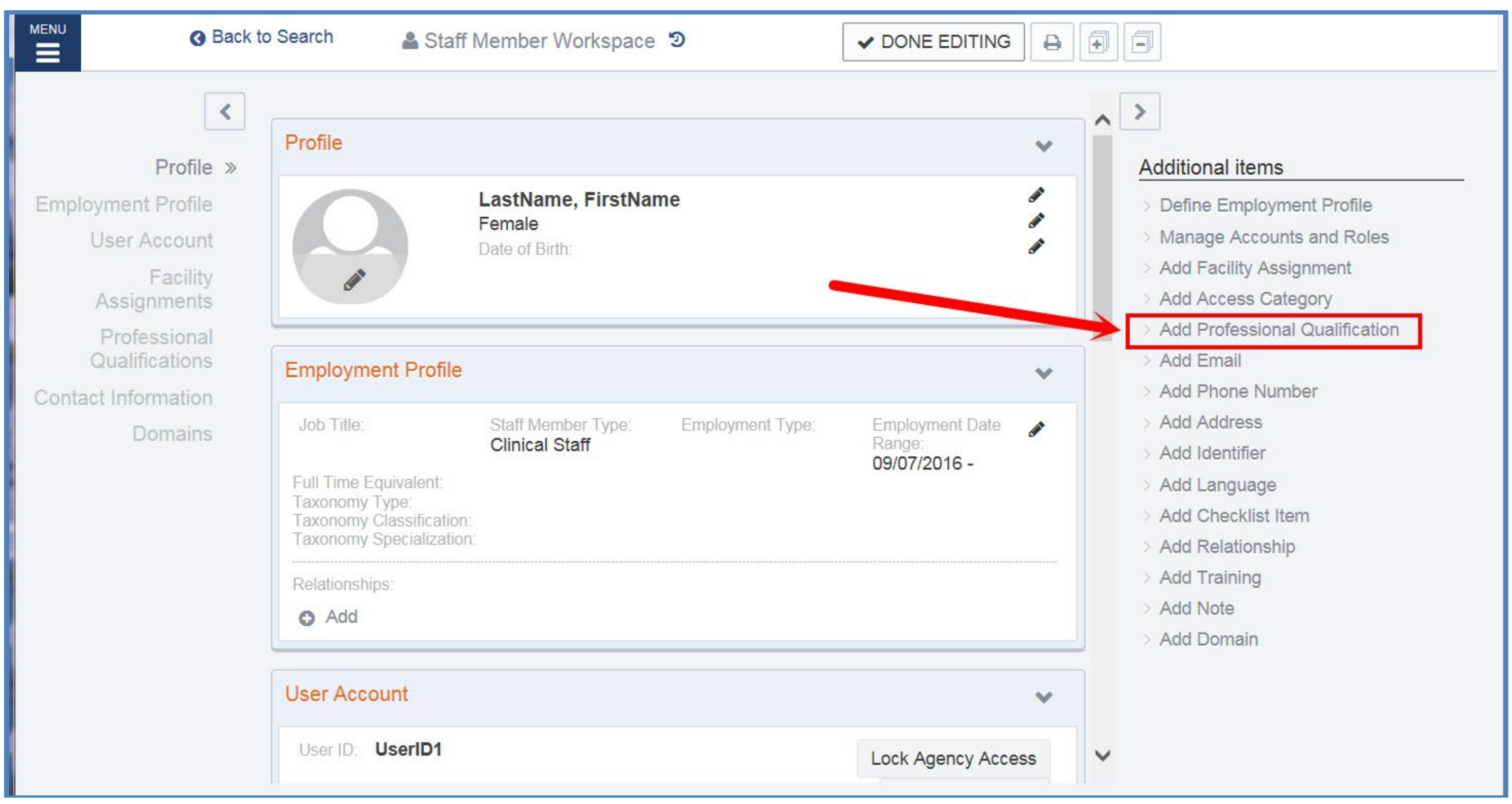
22. Click Add Access Category.



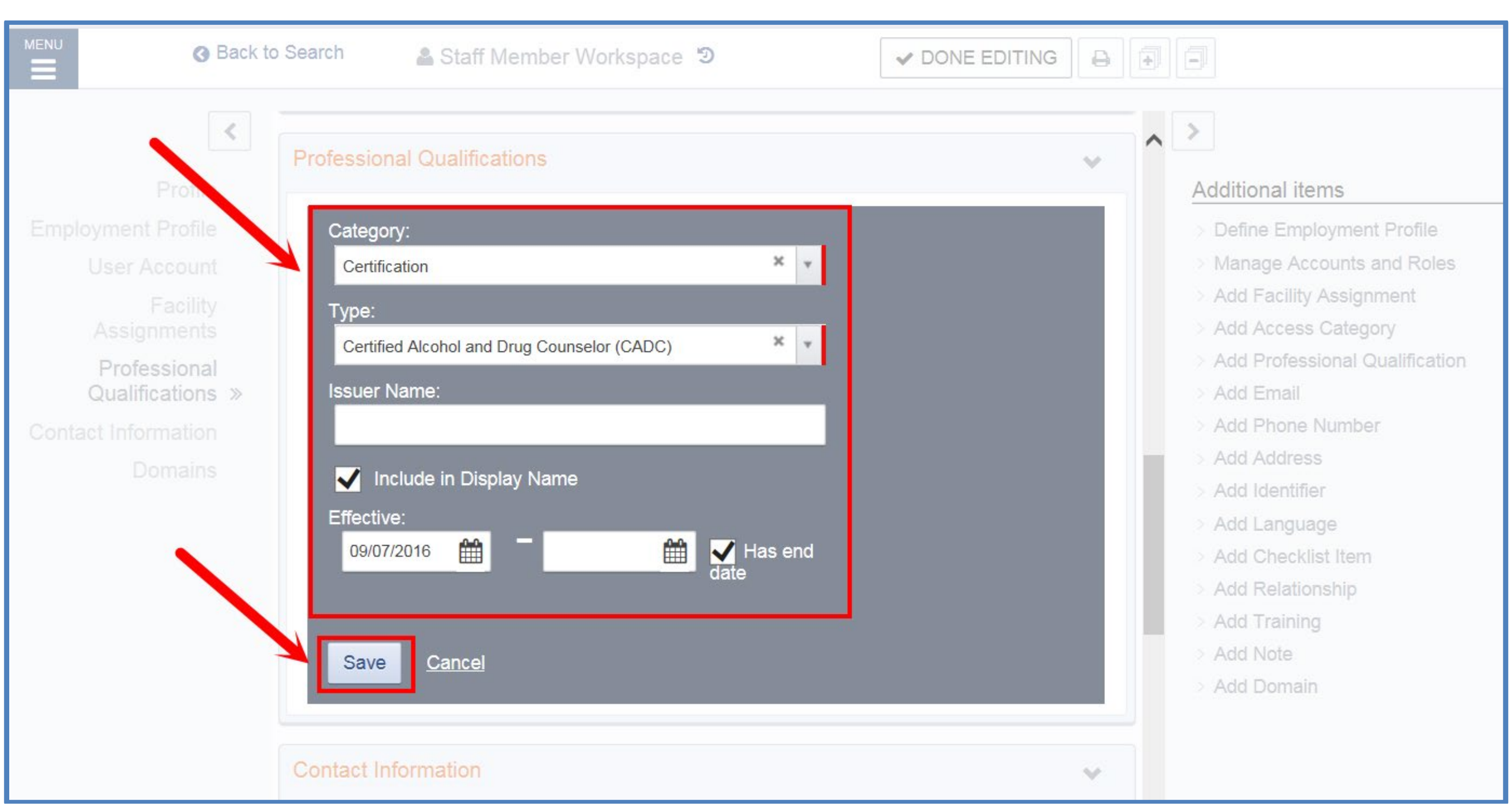
23. Complete the following field.
   - Access Category – select Adult



24. Click .



25. Click  if applicable. **The credentials entered here will populate on electronic signatures in WITS**.



26. Complete the following fields.
    - Category – select Certification, Degree, or License.
    - Type – select the type of professional qualification.
    - Include in Display Name – check this box to include the Professional Qualification in the staff member's display name.
    - Effective – enter the start date.

27. Click 

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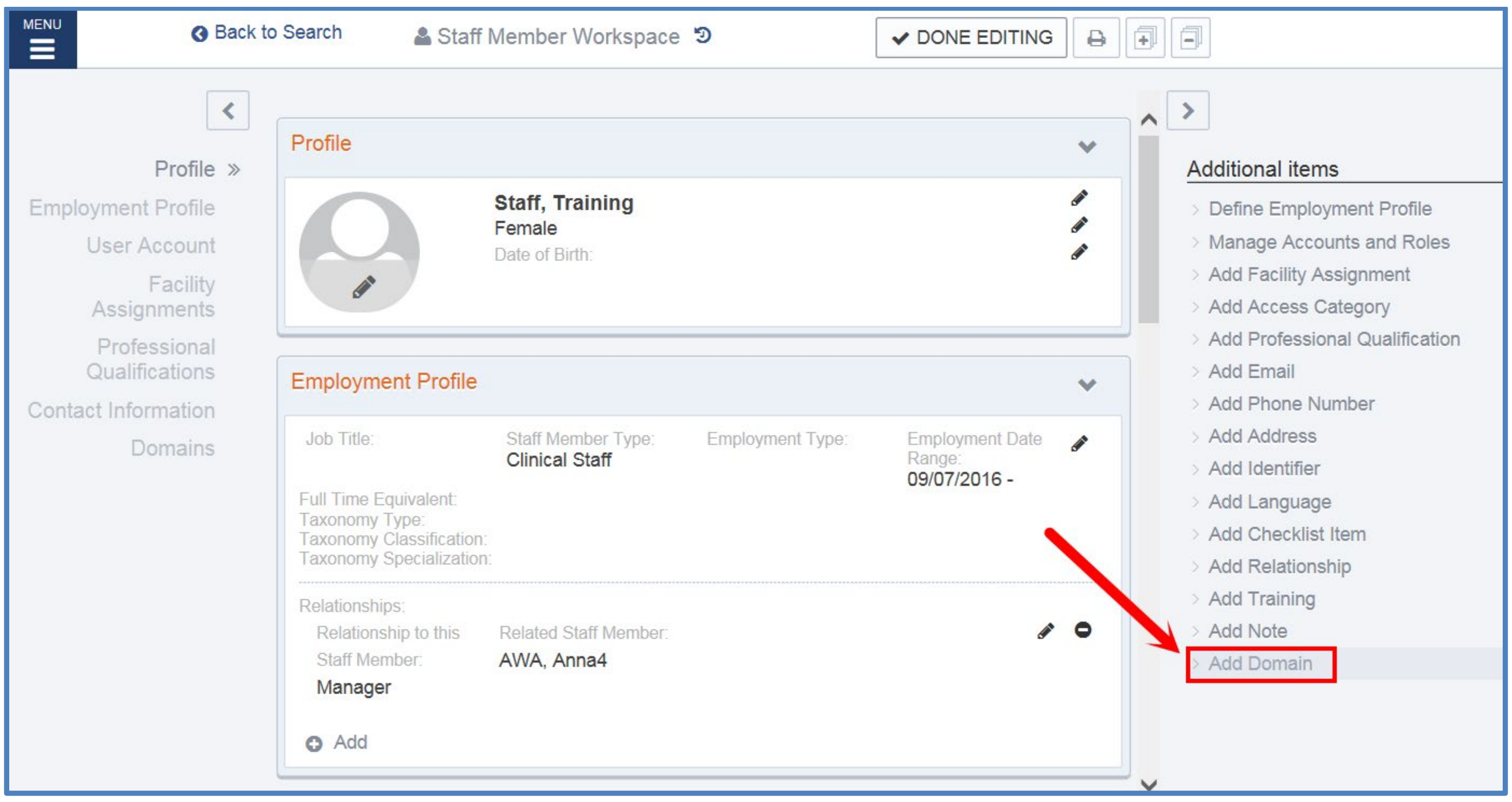

28. Click 

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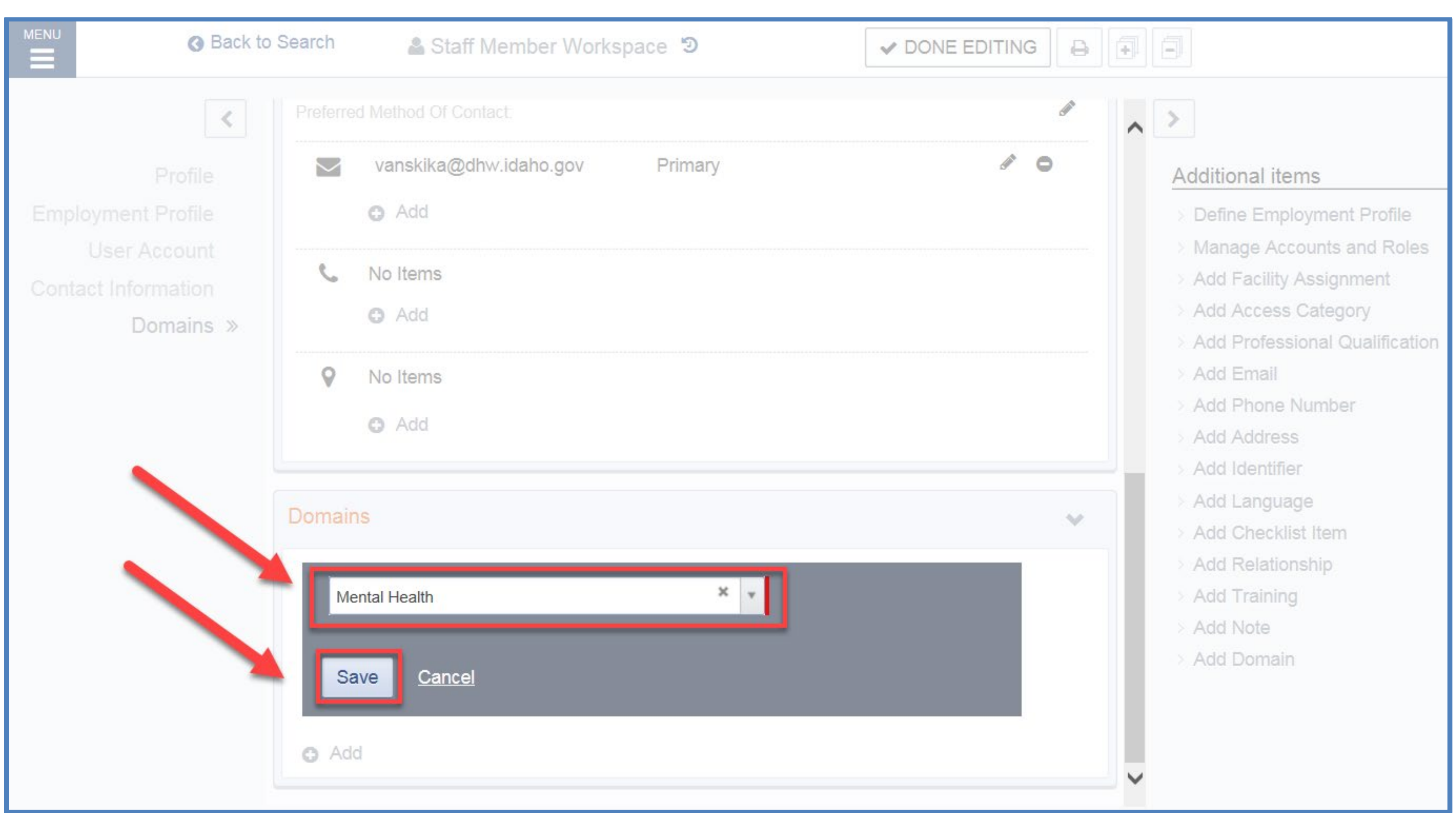

29. Select Mental Health.

30. Click 

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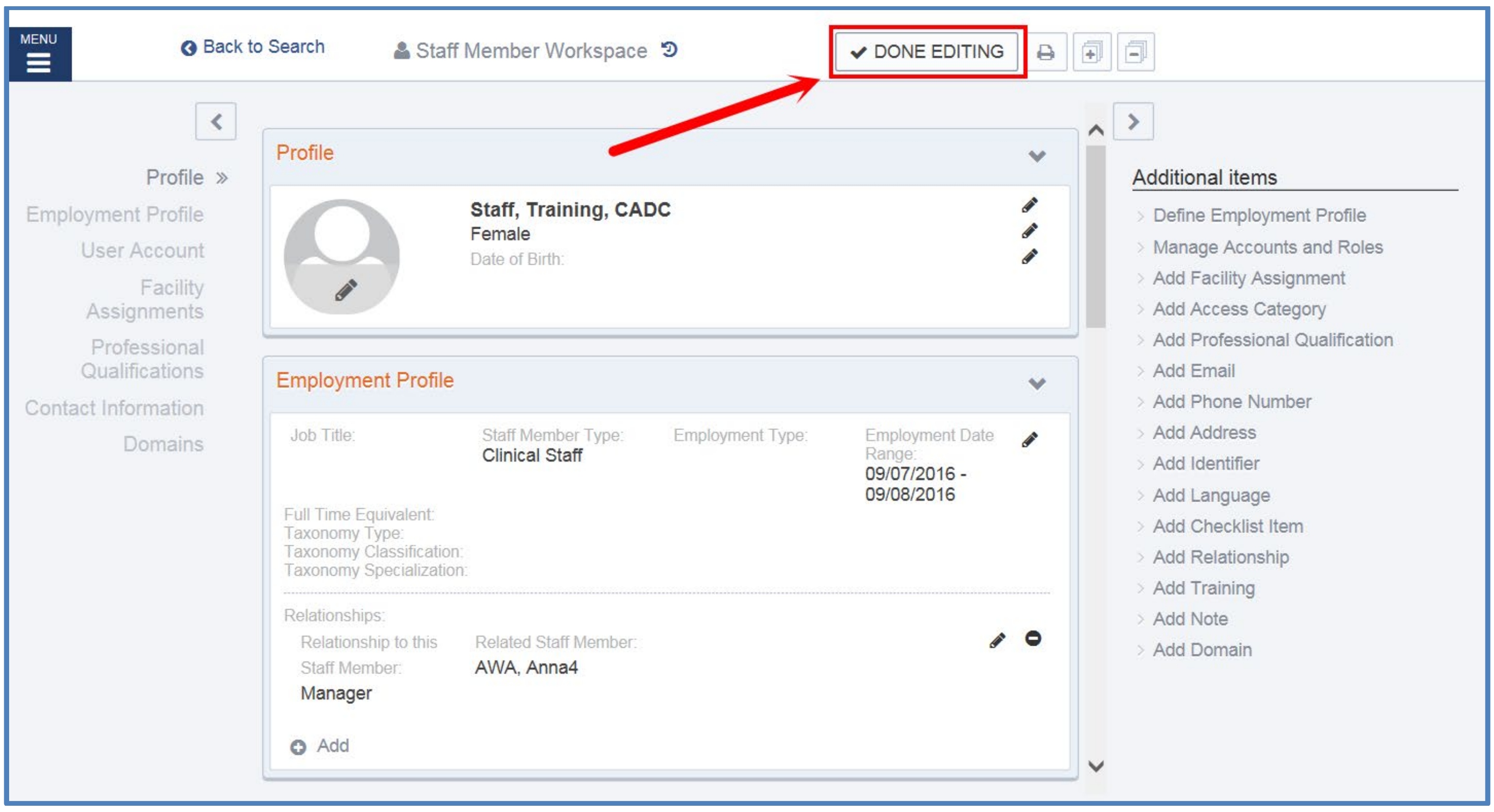
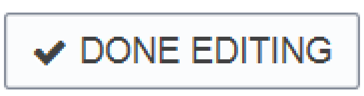


31. Click 

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Process & Instructions for Reactivation/Adding an Employee to WITS that Previously had a WITS Account in my Agency

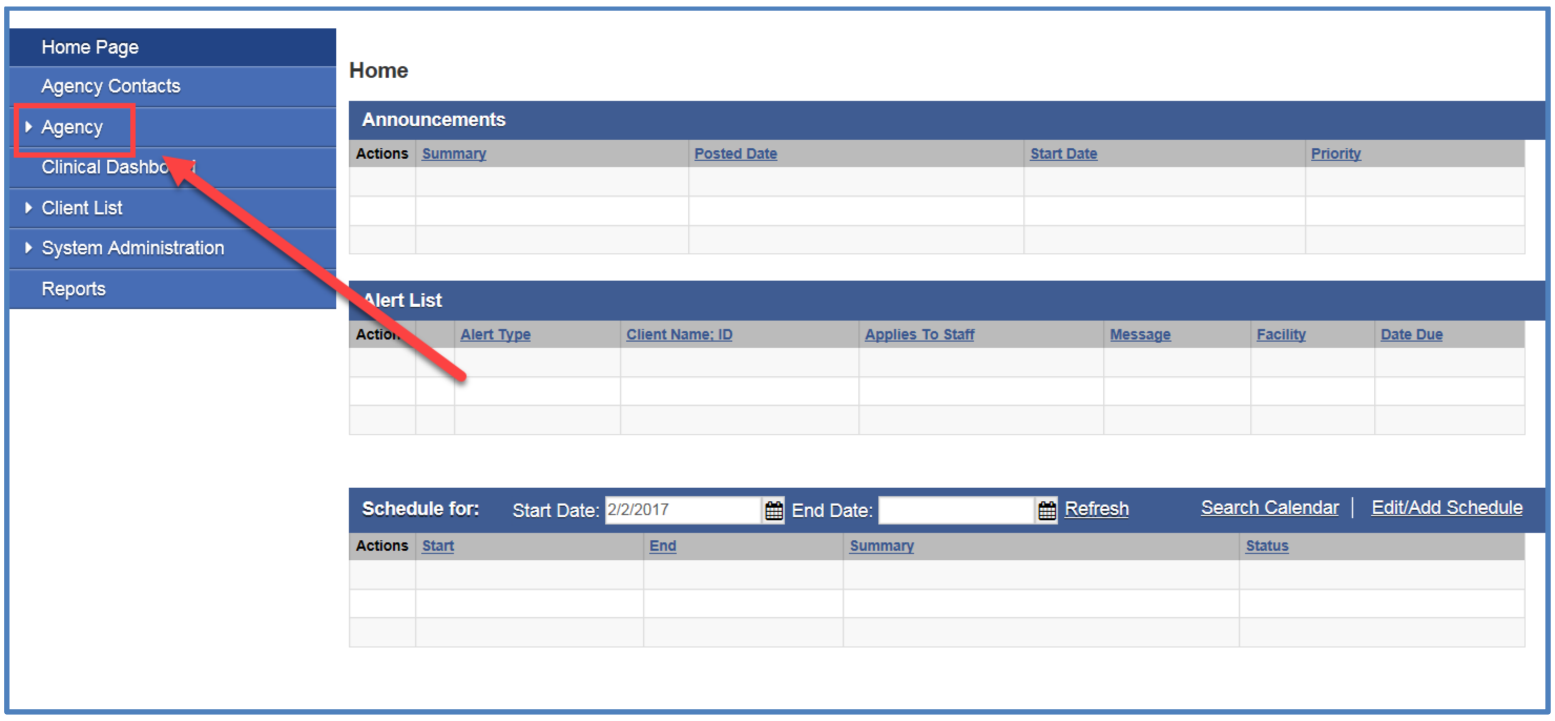
Create and submit an Account Administration Support Ticket in WITS and attach the signed Idaho WITS User Agreement within five (5) business days of creating or reactivating the WITS staff member account.

1. Make sure the staff member has read and signed a new Idaho WITS User Agreement.
2. Review the staff member's previous WITS account.
   a. Look at the User ID. If there are numbers after the User ID such as "brown5478", you will not be able to reactivate the WITS account.
      - If the account has a User ID similar to the example above, create a new staff account.
      - If the account does not have a User ID similar to the example above, follow this process:
      - Unlock the staff member's account
      - Remove the end date in the Employment Date Range, End Date field on the staff profile
      - Verify all contact information, access categories, access to facilities, etc. is correct
      - Assign roles to the staff member's account using the BHCCC Staff Roles. Give staff the level of access (permissions) required to perform their job. Do not give any roles that are not necessary to complete their job.
3. Create an Account Administration Support Ticket in WITS within five (5) business days of creating the WITS staff member account.
   a. Include the following information in the Description field of the Support Ticket:
      - Staff Member's first and last name
      - Document any requests for elevated privileges. For example, you may request a staff member other than the AWA to also have the ability to reset passwords/PINs.
   b. Attach a copy of the signed Idaho WITS User Agreement.
   c. Submit the Support Ticket to the WITS Help Desk for processing (click Submit to WITS Admin).

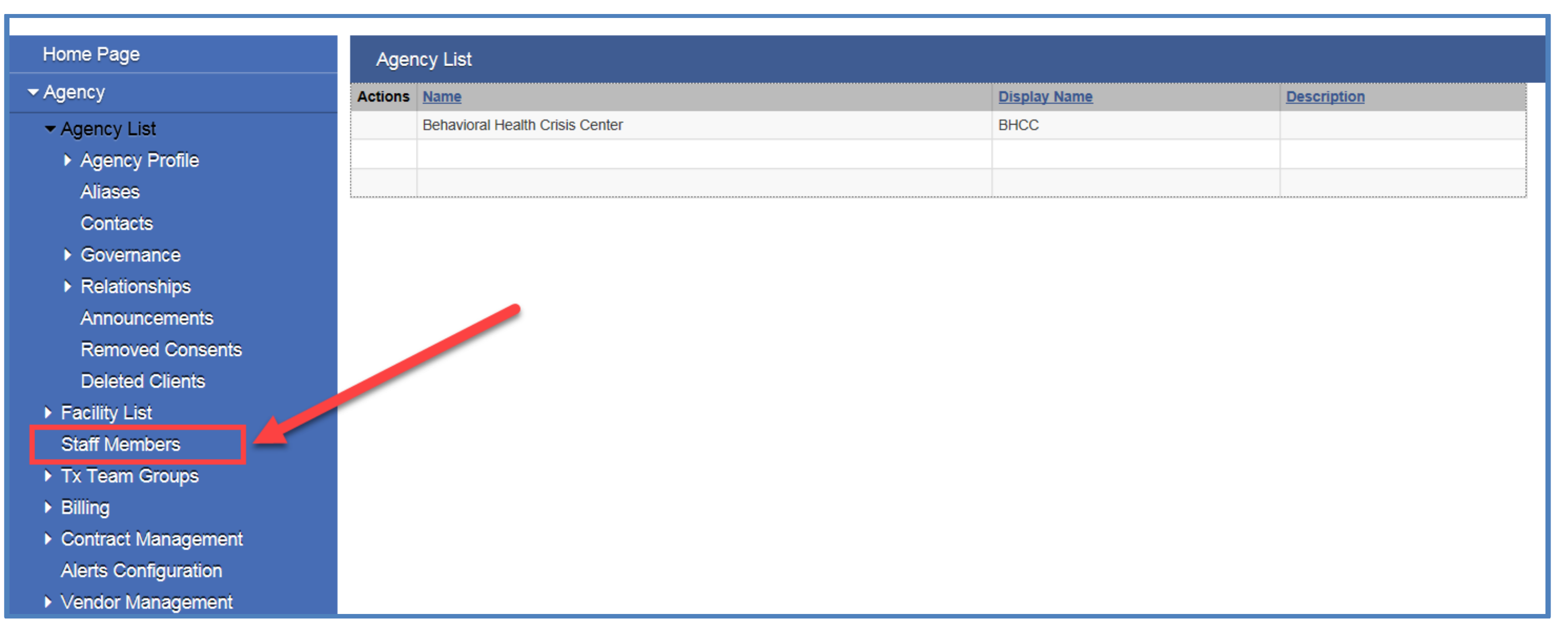
The WITS Help Desk staff will process a Support Ticket within three (3) business days of it being received. When additional information is required, the Support Ticket will be resolved within two (2) business days of receipt of the additional information. When additional information is requested and a response is not received within five (5) business days, the Support Ticket will be closed and the request will not be processed.

How to Reactivate a Staff Profile

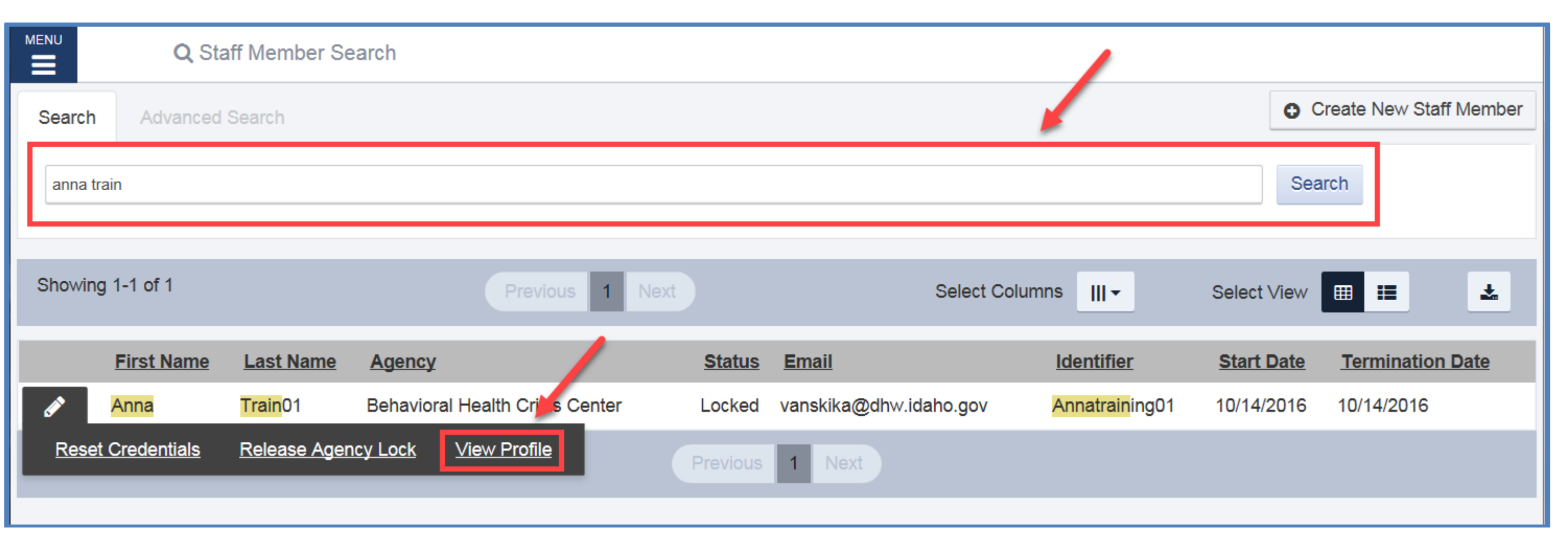
1. Begin on the Home Page.



2. Click Agency on the blue navigation pane.

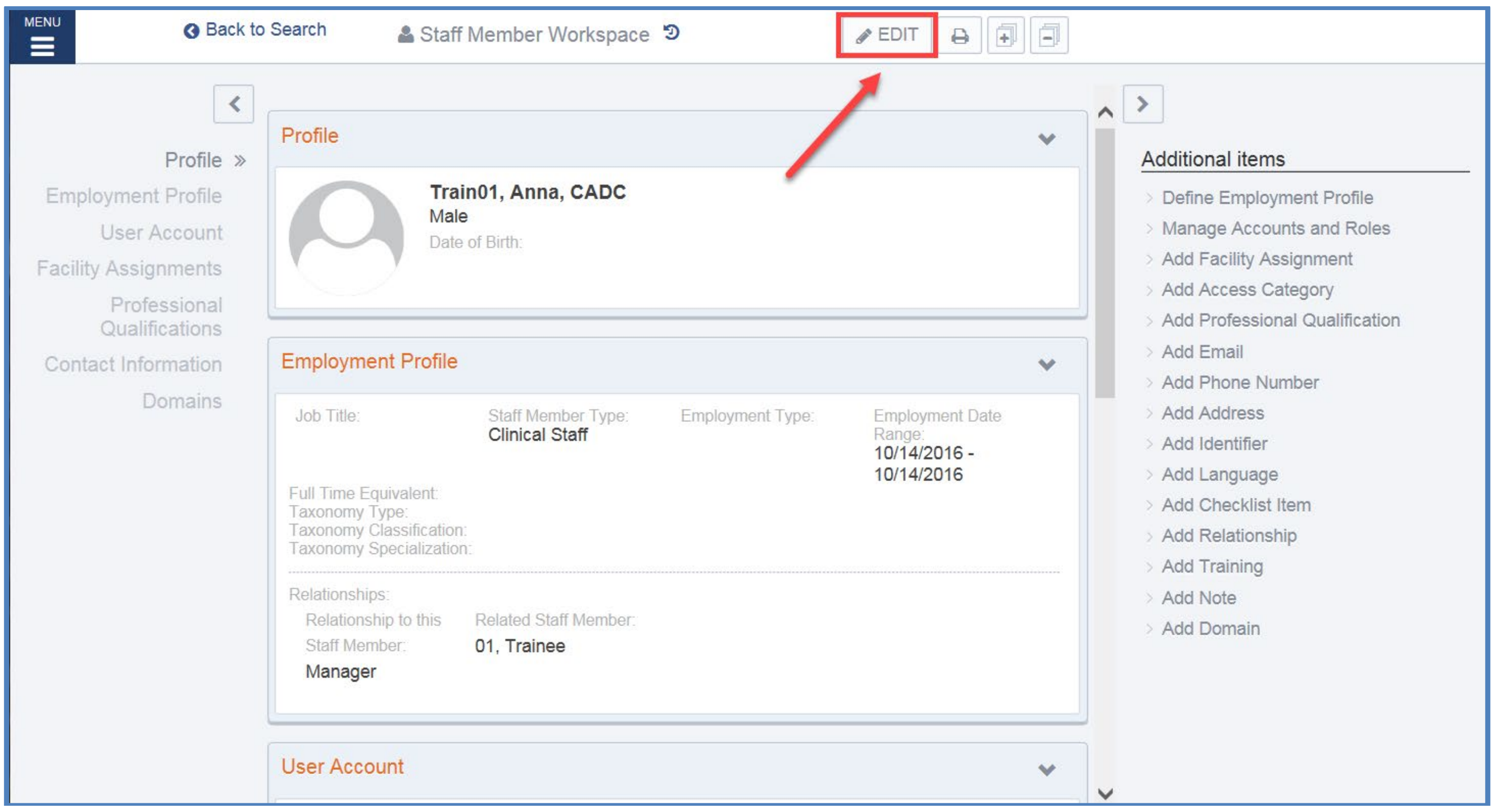


3. Click Staff Members on the blue navigation pane.

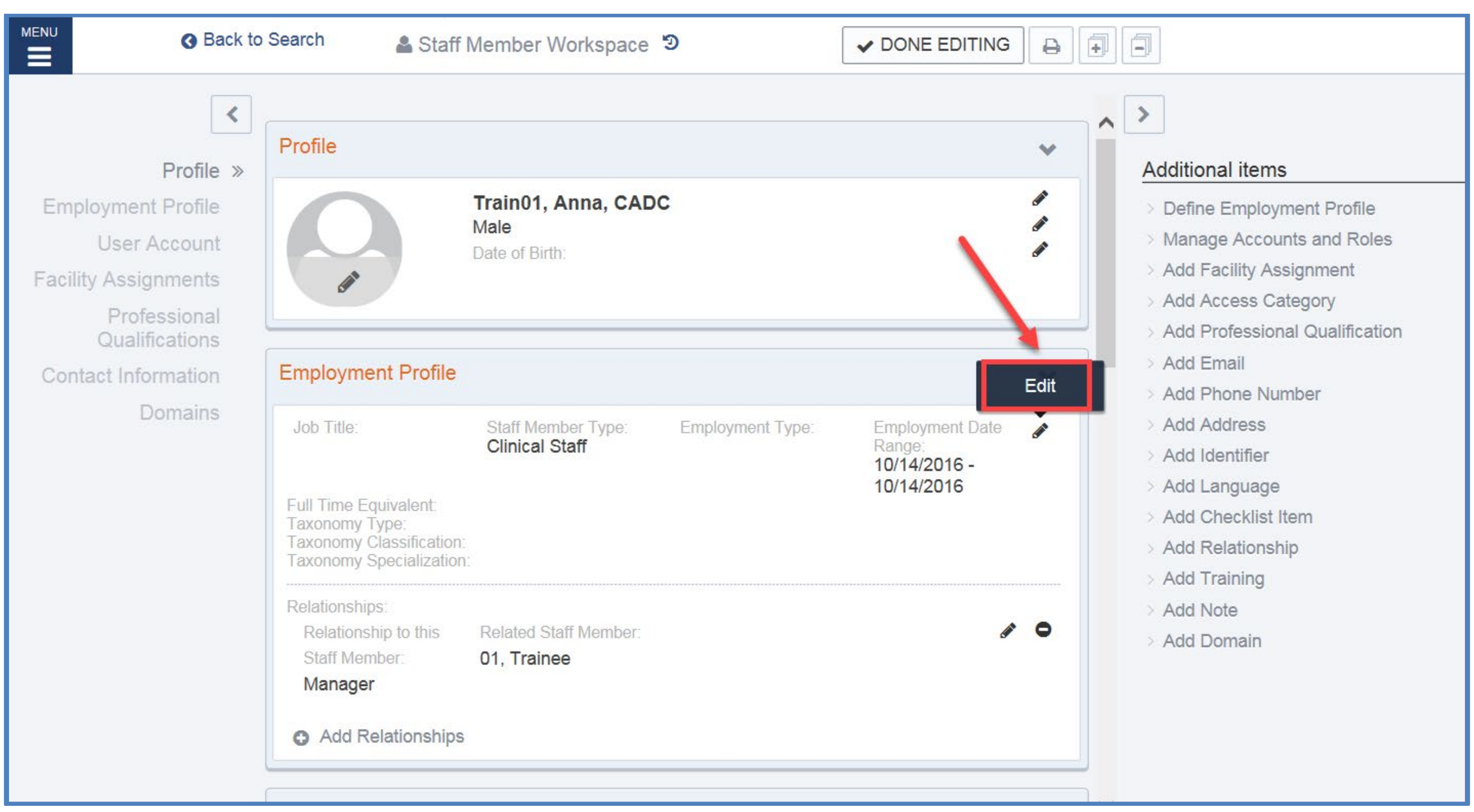


4. Enter your search criteria and click Search. The system returns any records that match the search criteria.

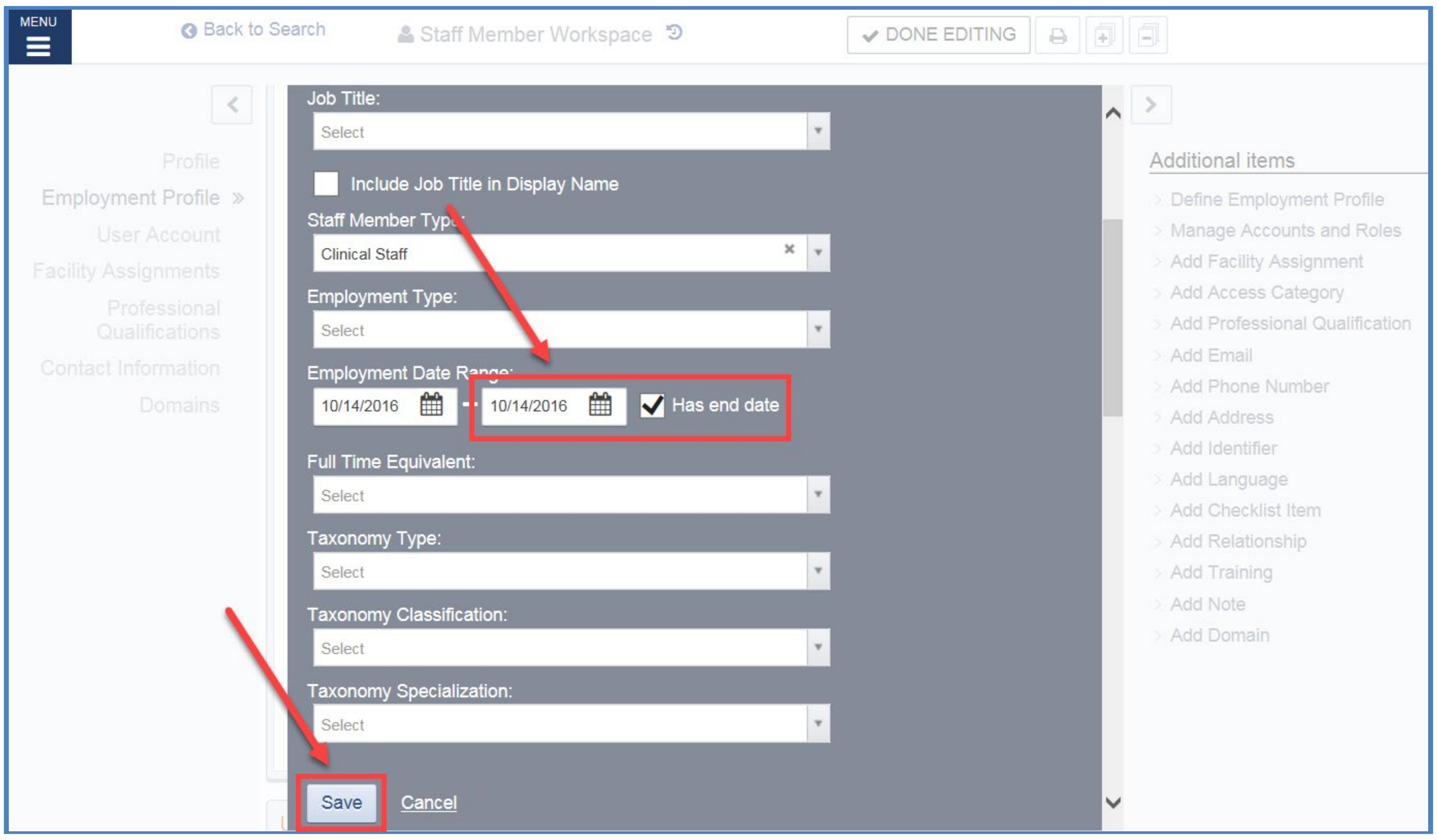
5. Hover over the and click View Profile.



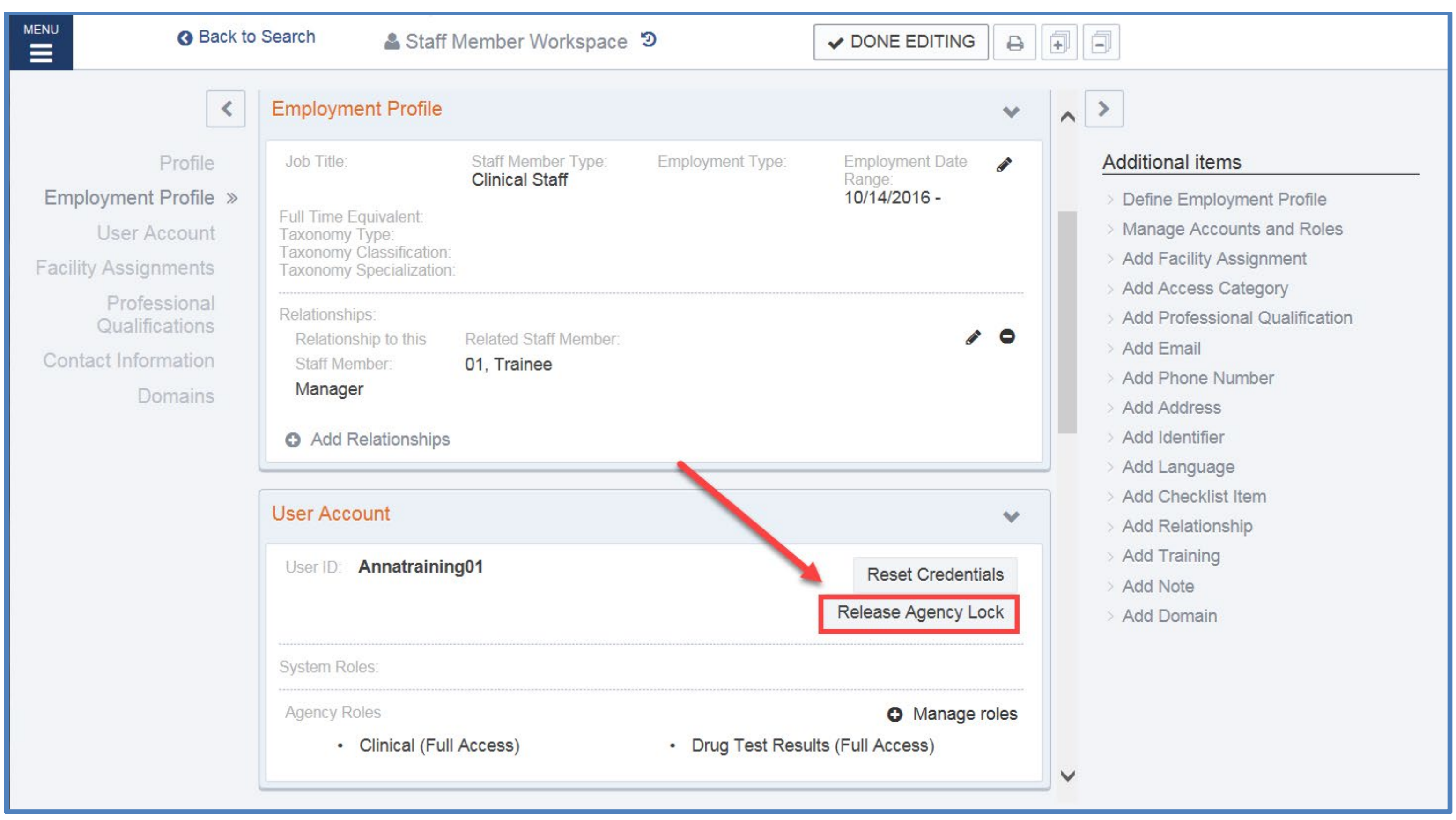
6. Click EDIT.



7. Scroll to the Employment Profile section, hover over the ✎ and click Edit beside the Employment Date Range.

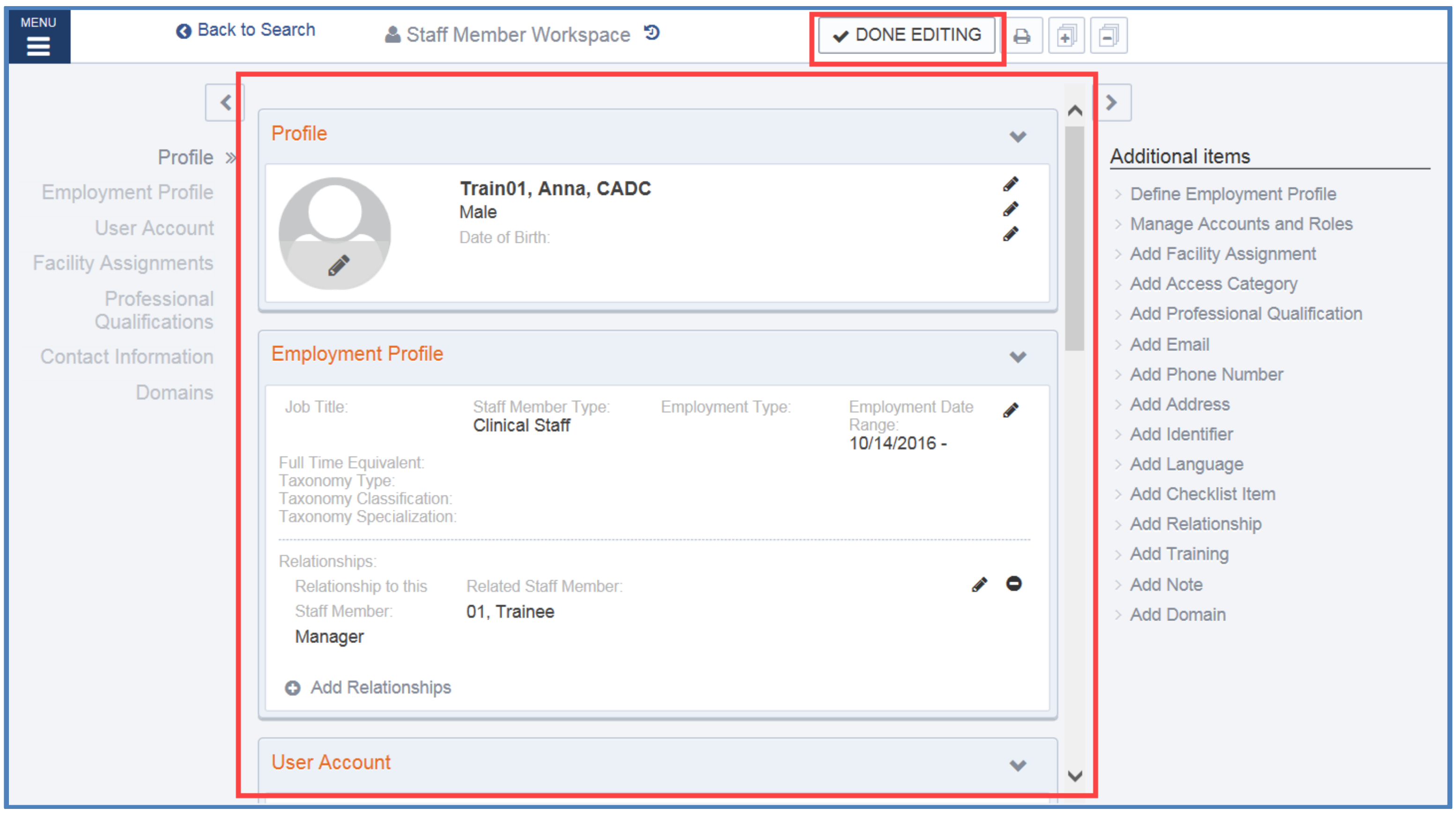


8. Delete the end date from the Date Range field and click Save.



9. Scroll to the User Account section and click Release Agency Lock.

10. Click Release Lock.



11. Review and update all information and roles on the Staff Member's Profile. When completed, click ✔ DONE EDITING.

Process for Designating a Staff Member as an AWA

STANDARDS Permissions will be granted after the designated staff member has attended an Agency WITS Administrator training.

TIPS AWA roles will be assigned by the Idaho WITS Help Desk.

1. Complete the Agency WITS Administrator Checklist and Designation Form.
2. If the staff member has an active staff member account in WITS, go to step 4.
3. If the staff member does not have an active staff member account in WITS, make sure they have read and signed a new Idaho WITS User Agreement.
   a. Create the staff member's WITS account
4. Create an Account Administration Support Ticket in WITS (within five (5) business days of creating the WITS staff member account).
   a. Include the following information in the Description field of the Support Ticket:
      - Staff Member's first and last name is designated as an AWA.
   b. Attach a copy of the signed Idaho WITS User Agreement (if applicable) and the AWA form.
   c. Submit the Support Ticket to the WITS Help Desk for processing (click Submit to WITS Admin).
      i. The WITS Help Desk will schedule an on-line training for the new AWA within 2 weeks of processing the completed Support Ticket.

The WITS Help Desk staff will process a Support Ticket within three (3) business days of it being received. When additional information is required, the Support Ticket will be resolved within two (2) business days of receipt of the additional information. When additional information is requested and a response is not received within five (5) business days, the Support Ticket will be closed and the request will not be processed.

Process & Instructions for Revoking a Staff Member's WITS Account

WITS access should be revoked <u>within 24 hours</u> of a staff member leaving the BHCCC's employment or no longer requiring WITS access to perform their job.

Create and submit an Account Administration Support Ticket in WITS within five (5) business days of revoking a WITS staff member account.

1. Review the staff member's WITS account.
   a. Lock the staff member's WITS account <u>within 24 hours</u> of a staff member leaving or no longer requiring WITS access using the instructions below.
   b. Enter an end date in the Employment Date Range, End Date field of the staff member's profile in WITS. Do Not remove or update the staff member's email address.
2. Complete an Idaho WITS Staff Member Revocation Form for the staff member. An AWA or a Supervisor must sign the form.
3. Create an Account Administration Support Ticket in WITS within five (5) business days of revoking the WITS staff member account.
   a. Include the following information in the Description field of the Support Ticket:
      - Access revoked for Staff Member (first and last name).
   b. Save the Support Ticket and attach the signed Idaho WITS Staff Member Revocation Form.
   c. Submit the Support Ticket to the WITS Help Desk for processing (click Submit to WITS Admin).

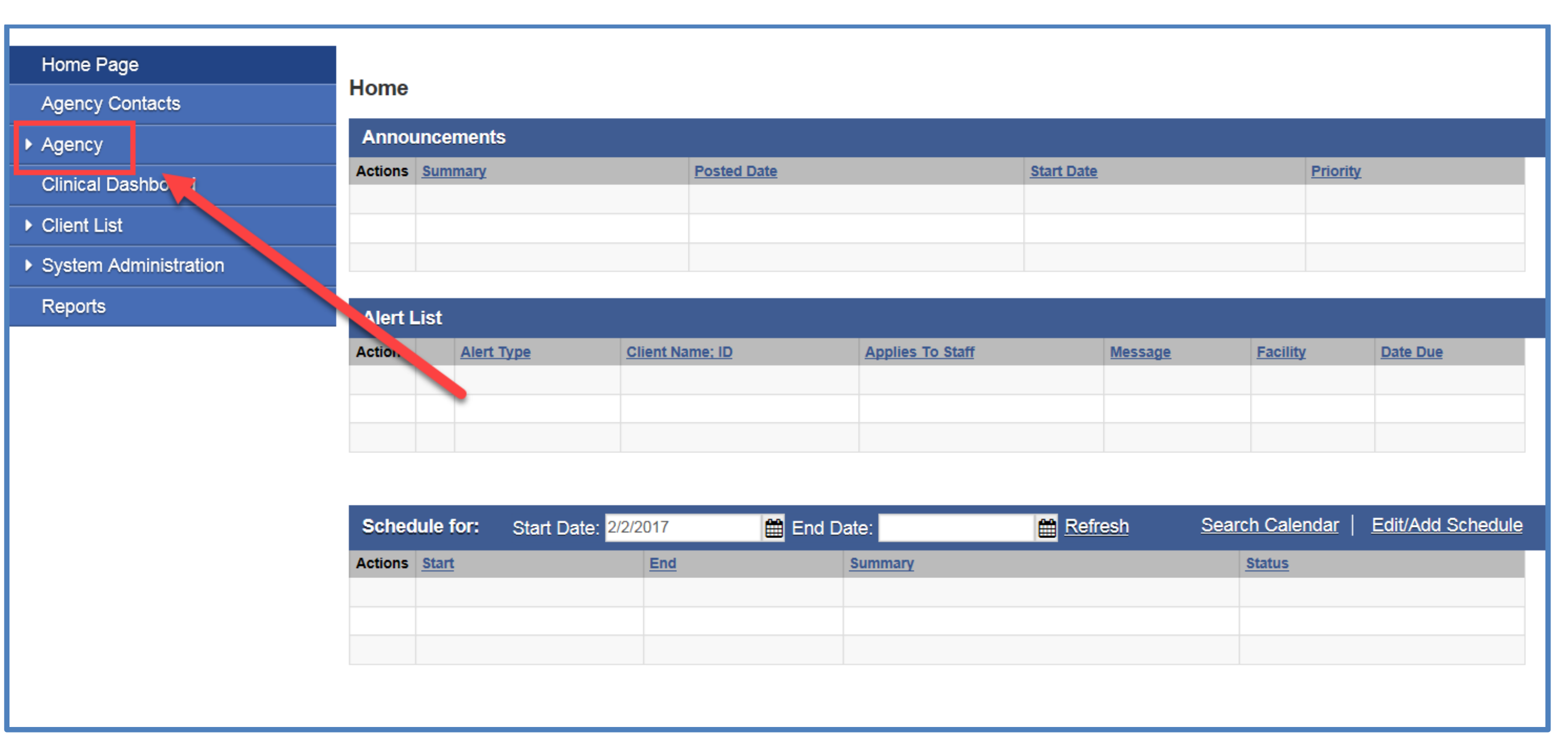
The WITS Help Desk staff will process a Support Ticket within <u>three (3) business days</u> of it being received. When additional information is required, the Support Ticket will be resolved within two (2) business days of receipt of the additional information. When additional information is requested and a response is not received within five (5) business days, the Support Ticket will be closed and the request will not be processed.

Revoking a Staff Member's WITS Account

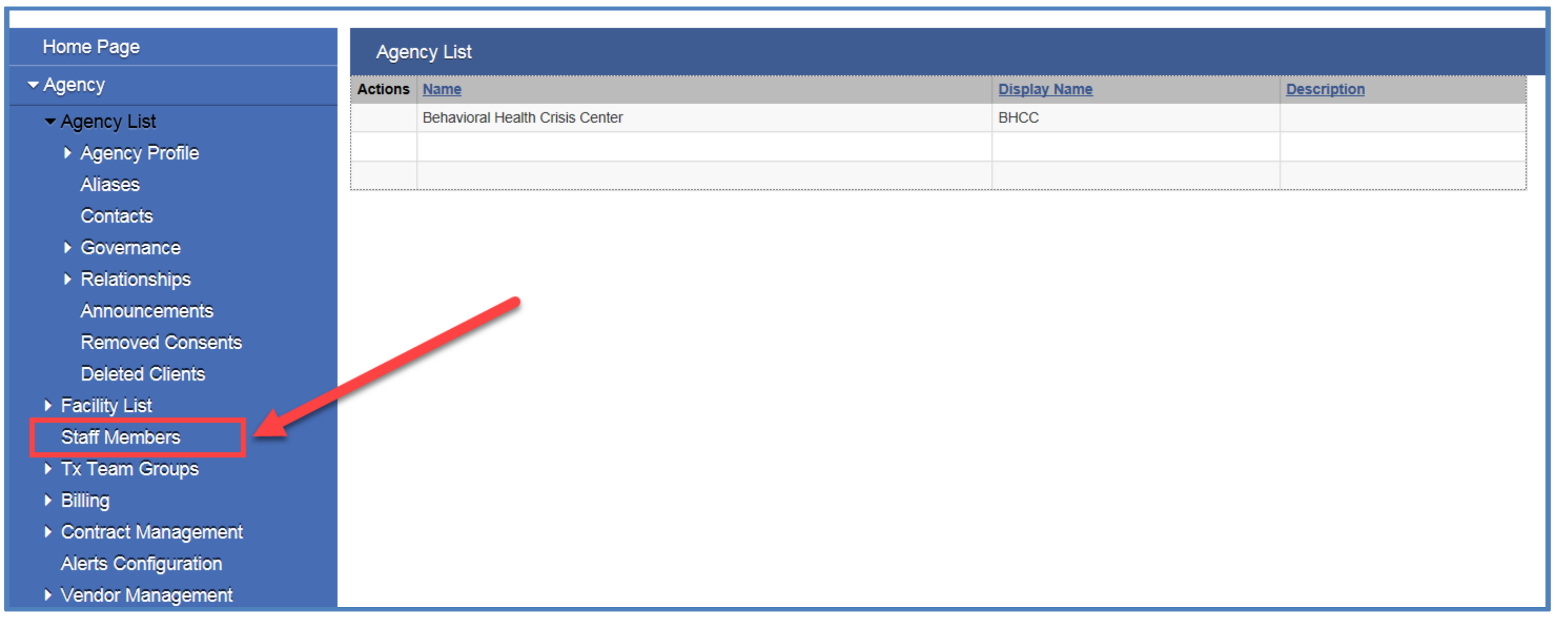
WITS access should be revoked within <u>24 hours</u> of a staff member leaving the agency's employment or no longer requiring WITS access to perform their job.

Create and submit an Account Administration Support Ticket in WITS within five (5) business days of revoking a WITS staff member account.

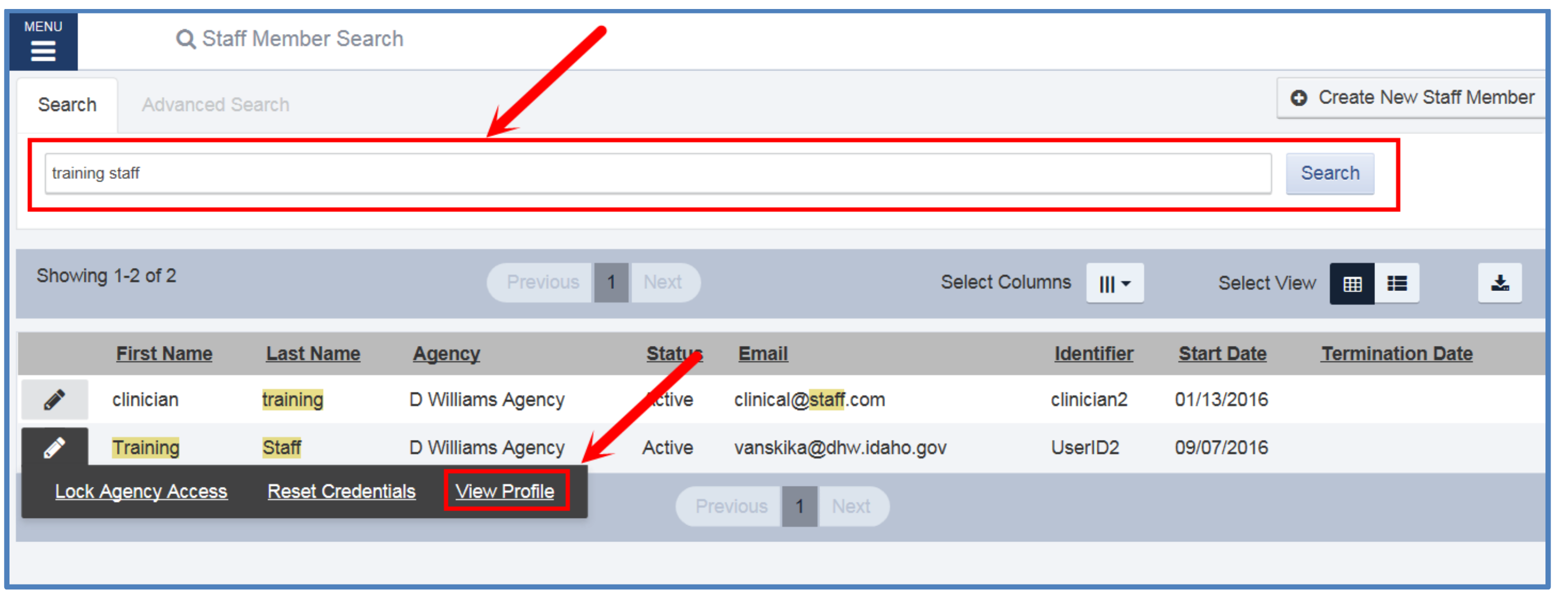
1. Begin on the Home Page.



2. Click Agency on the blue navigation pane.

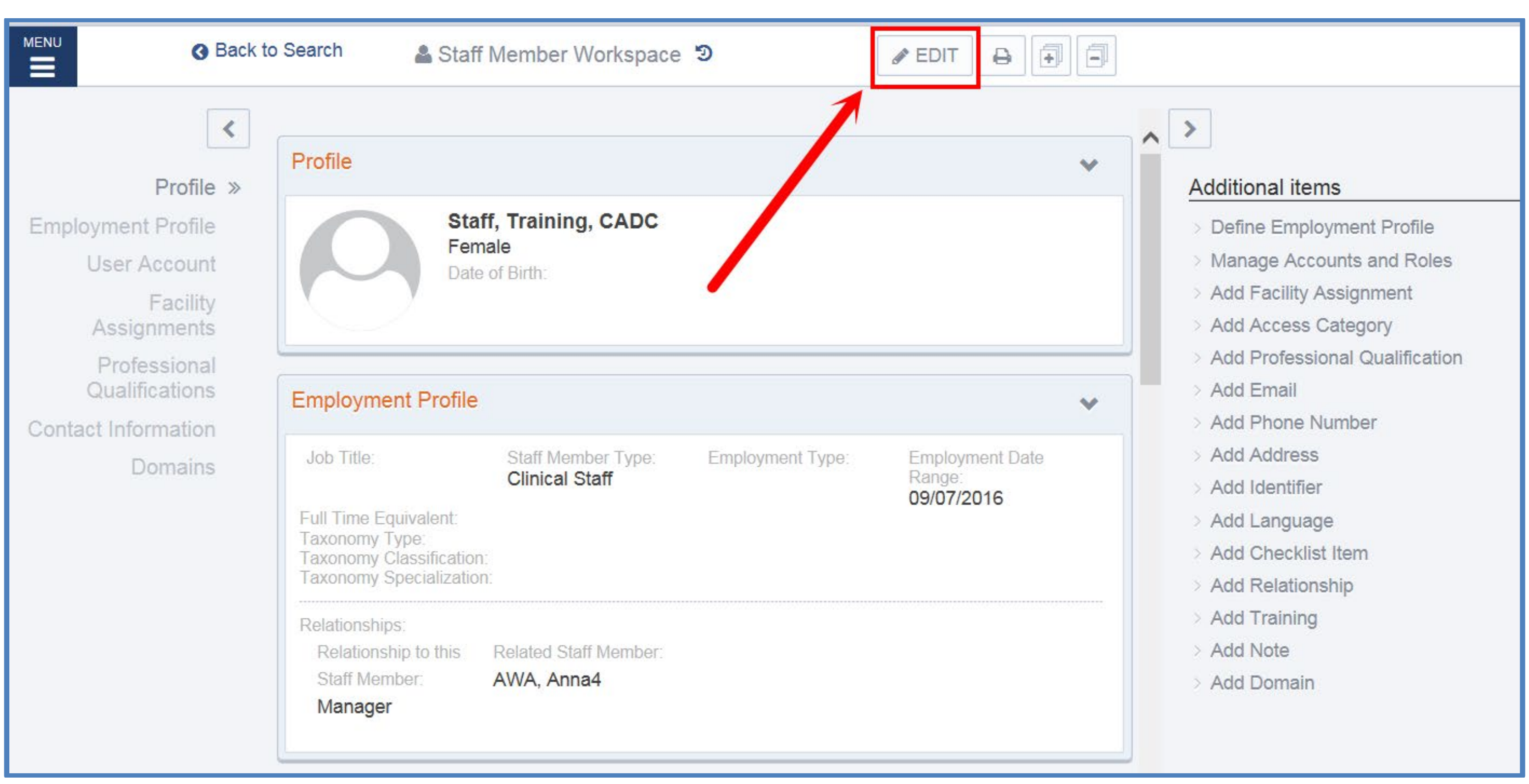


3. Click Staff Members on the blue navigation pane.

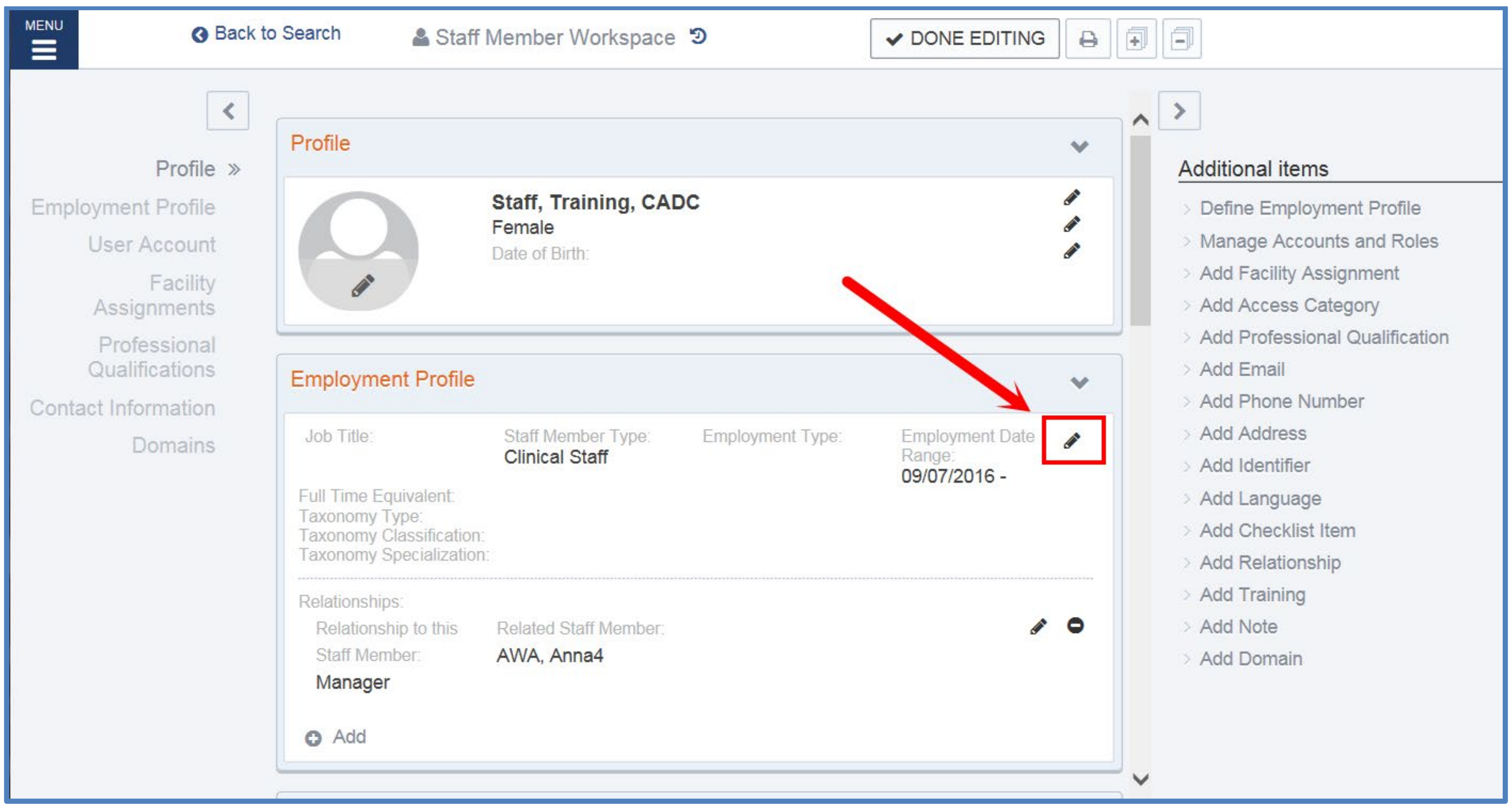


4. Enter your search criteria and click Search. The system returns any records that match the search criteria.

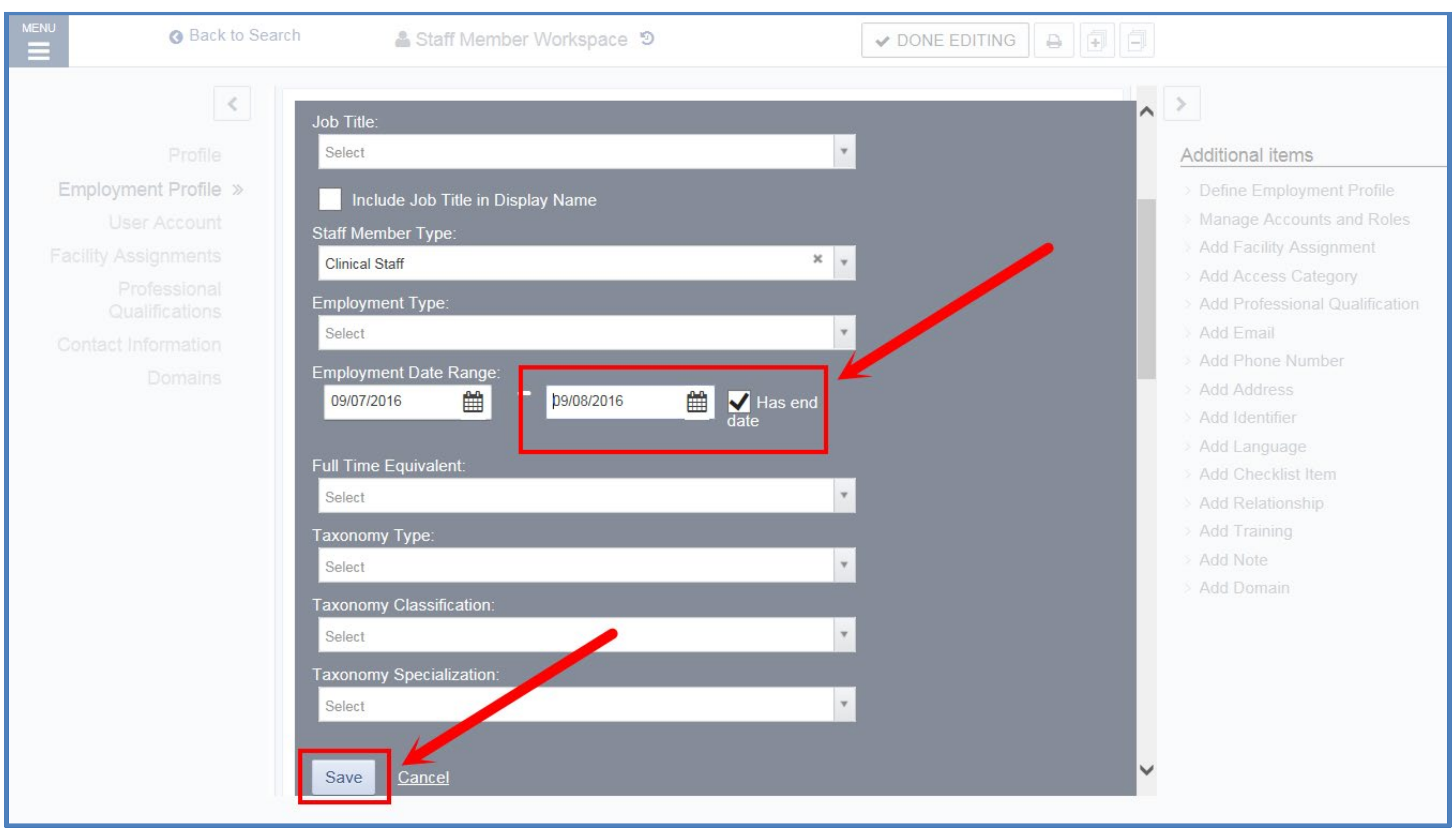
5. Hover over the  and click View Profile.



6. Click EDIT.

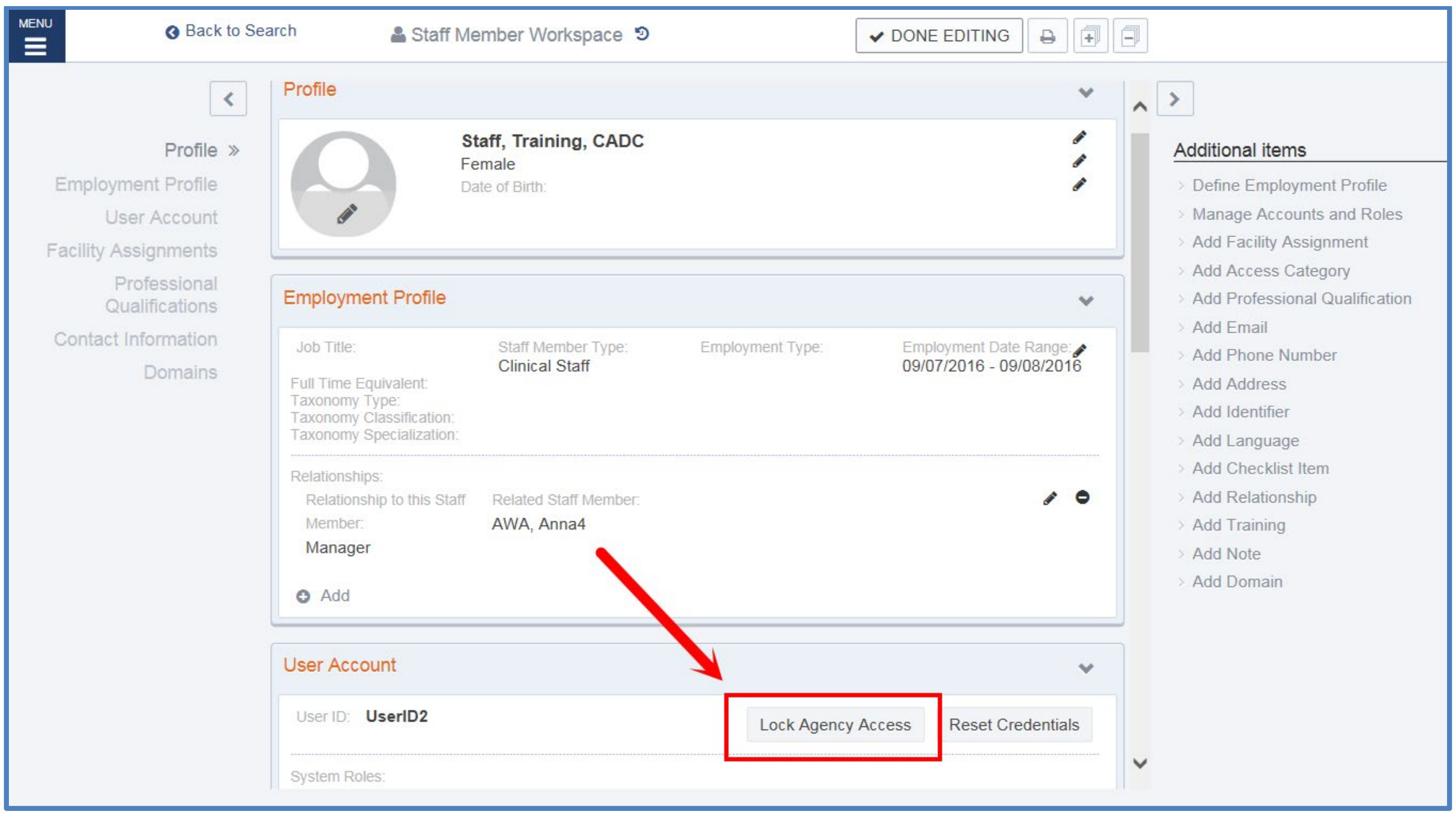


7. Scroll to the Employment Profile section, Hover over the and click Edit beside the Employment Date Range.



8. Complete the following field.
   - End Date – enter the end date.

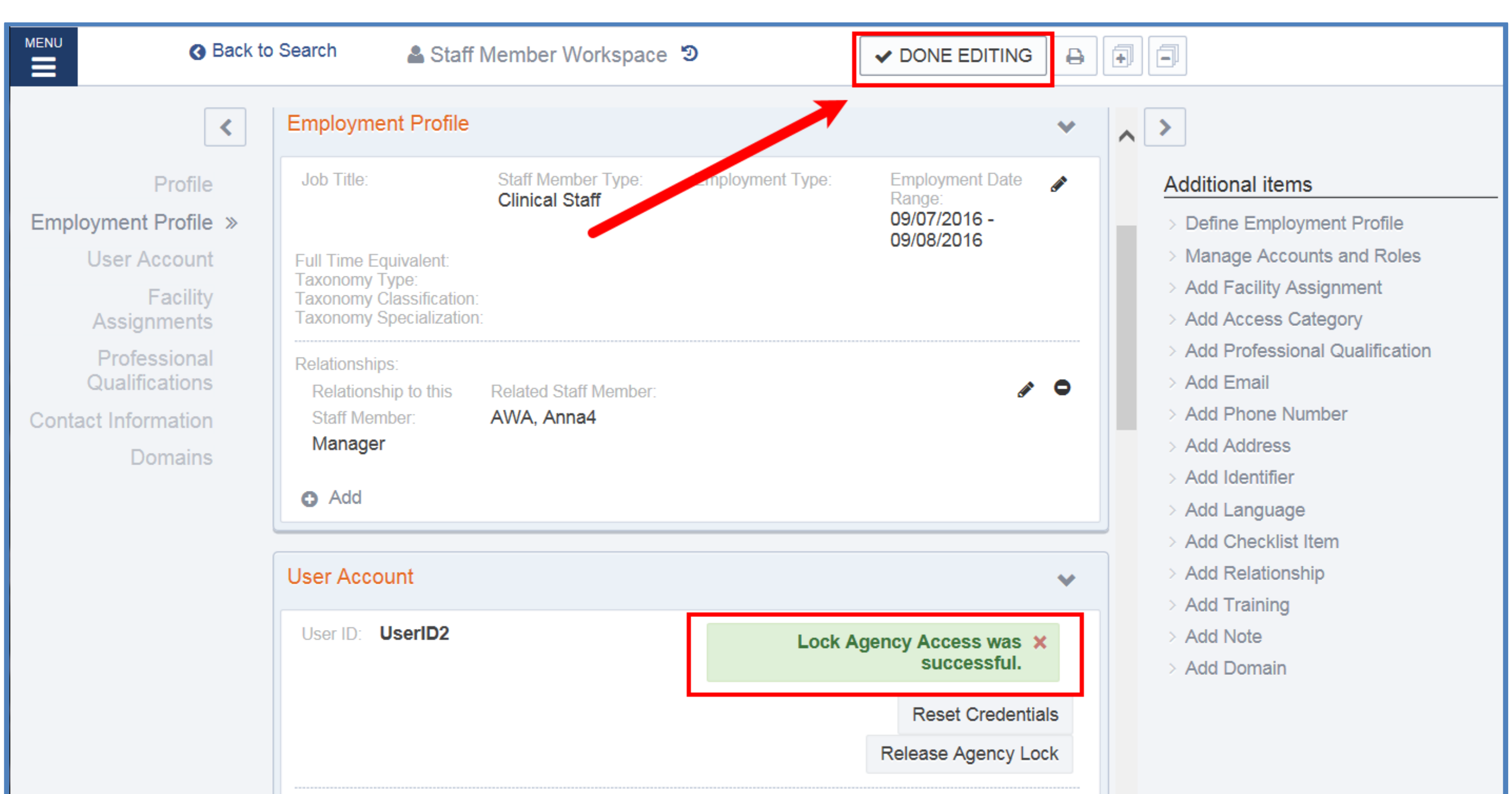
9. Click Save.



10. Scroll to the User Account section and click Lock Agency Access.

11. Complete the following field.
    - Lock Reason – enter the reason the staff member's WITS account is being locked.

12. Click Lock.



13. A message will appear in green letting you know the Lock Agency Access was successful.

14. Click ✔ DONE EDITING.

Deleting or Combining Records within WITS

Process for Requesting the Deletion/Combination of Client Profile Records

Client Profiles in WITS are considered a part of the client's official electronic health record (EHR**). In order to maintain the integrity of the client record, a client profile will only be deleted from WITS in the following circumstances: a client profile may be deleted from WITS if it is a duplicate within the same agency, and does not have any client activities that cannot be transferred.**

1. Create a Client Record Support Ticket in WITS.
   a. Select the Client Name.
   b. Include the following information in the Description field of the Support Ticket:
      - Client ID number of the profile to remove
      - Client ID number of the profile to keep if applicable.
      - Detailed information about the specific situation.
   c. Submit the Support Ticket to the WITS Help Desk for processing (click Submit to WITS Admin).

The WITS Help Desk staff will process a Support Ticket within three (3) business days of it being received. When additional information is required, the Support Ticket will be resolved within two (2) business days of receipt of the additional information. When additional information is requested and a response is not received within five (5) business days, the Support Ticket will be closed and the request will not be processed.

Process for Requesting a Non-Episode Contact Note to be Deleted or Moved to Another Client

Non-episode contacts in WITS are considered a part of the client's official electronic health record (EHR). In order to maintain the integrity of the client record, non-episode contacts will only be deleted from WITS during the following circumstance: if the note was entered into WITS under the wrong client's record, and has already been re-entered into the correct client's record. **It should be noted that non-episode contacts can be moved between client profiles by the WITS Help Desk.**

1. Create a Client Record Support Ticket in WITS.
   a. Select the Client Name.
   b. Include the following information in the Description field of the Support Ticket:
      - Client ID number the note was entered under
      - Client ID number to move the note to (if applicable)
      - Contact Date and Time
   c. Submit the Support Ticket to the WITS Help Desk for processing (click Submit to WITS Admin).

The WITS Help Desk staff will process a Support Ticket within three (3) business days of it being received. When additional information is required, the Support Ticket will be resolved within two (2) business days of receipt of the additional information. When additional information is requested and a response is not received within five (5) business days, the Support Ticket will be closed and the request will not be processed.

Deleting Drug Test Results

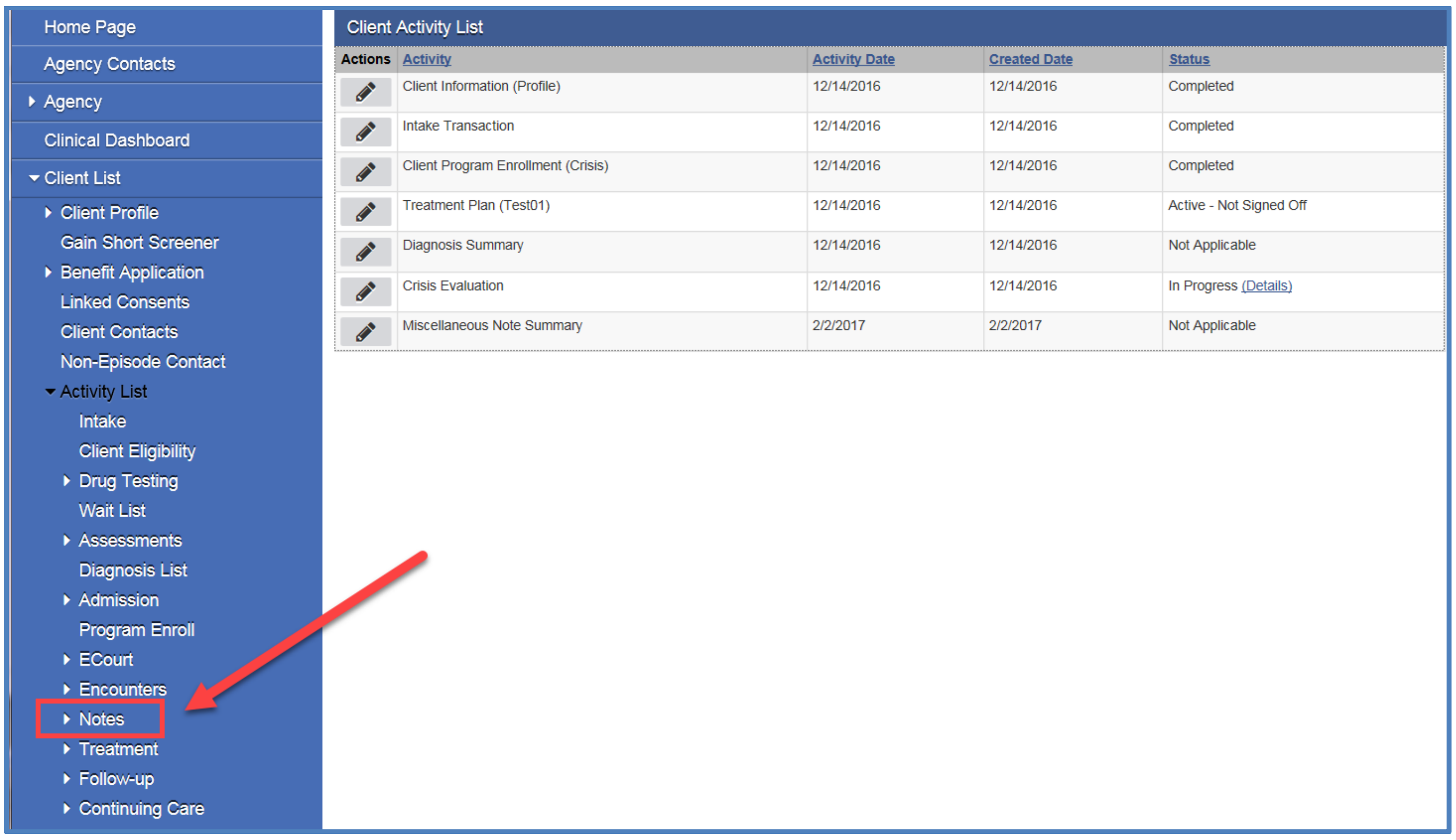
Drug Test Results in WITS are considered a part of the client's official electronic health record (EHR.) It is your agencies responsibility to ensure you are adhering to the documentation standards set forth by IDAPA.

All staff members who have permission to create a Drug Testing record can also delete the record.

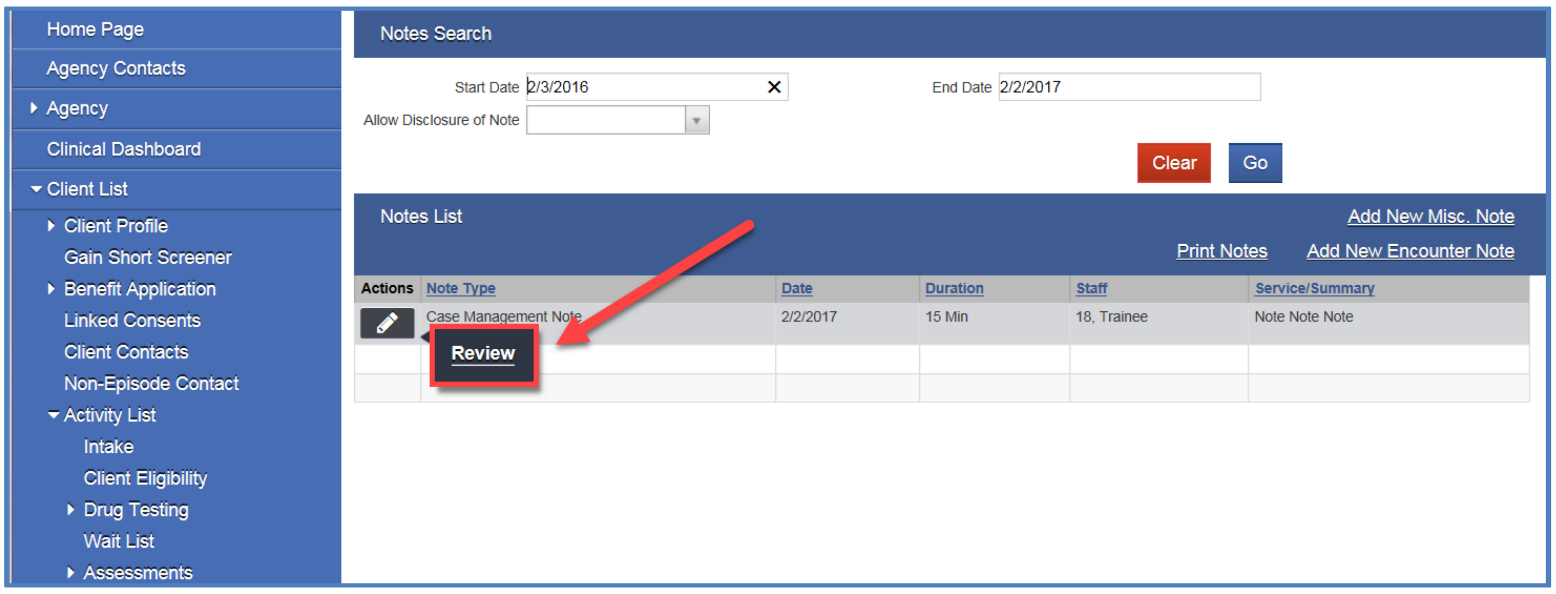
Deleting Miscellaneous Note

Miscellaneous Notes in WITS are considered a part of the client's official electronic health record (EHR). It is your agencies responsibility to ensure you are adhering to the documentation standards set forth by IDAPA.

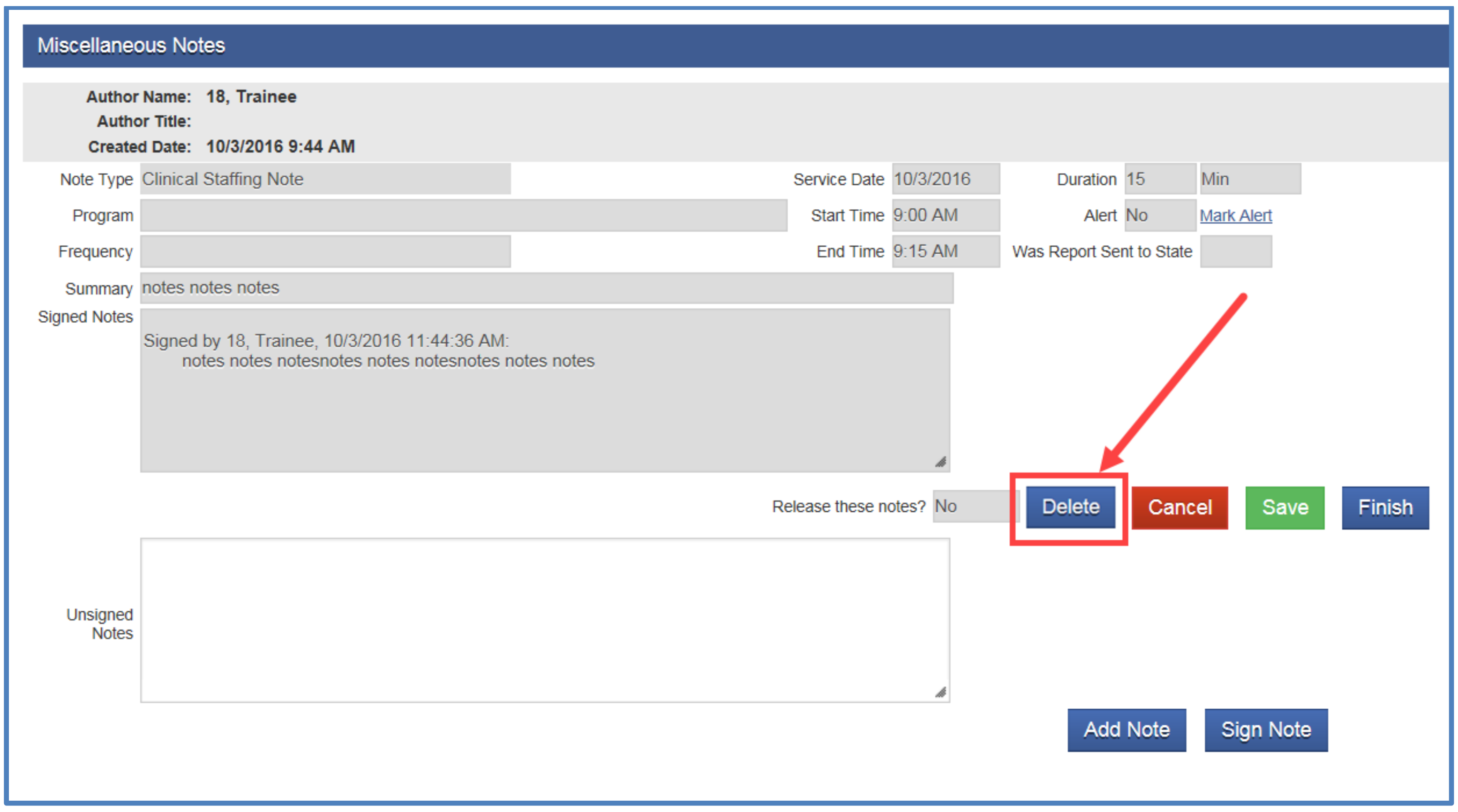
1. Begin on the Client Activity List.

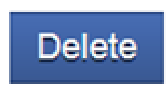


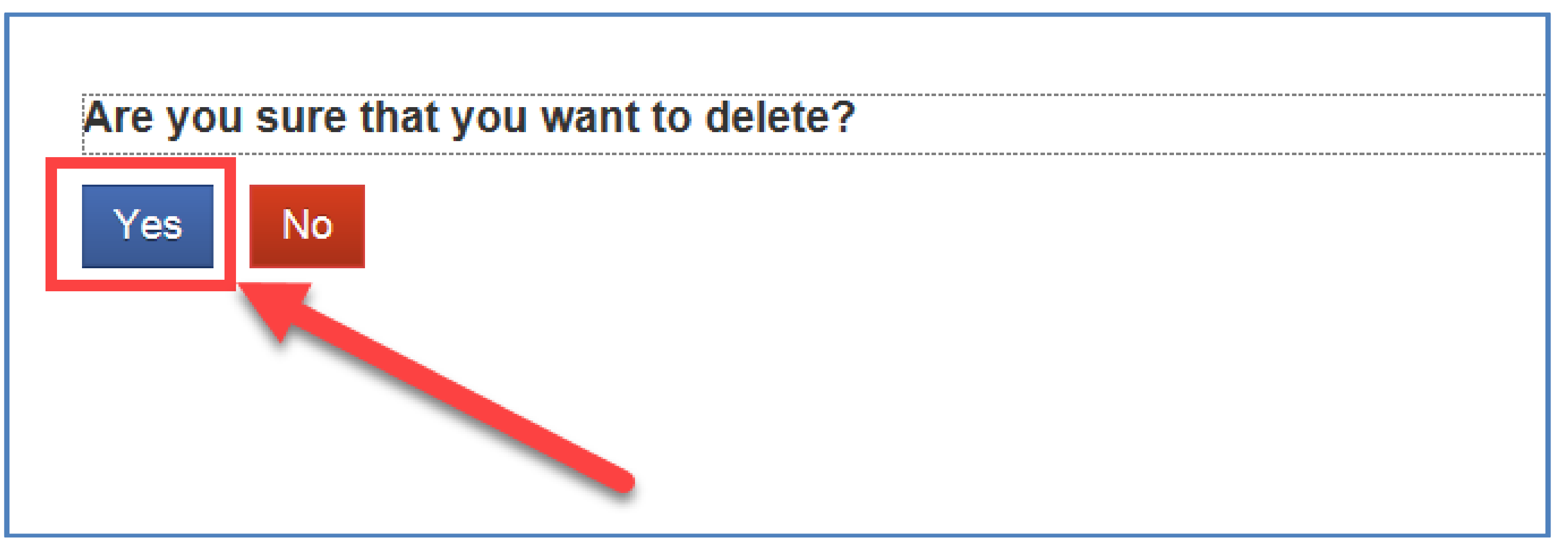
2. Once you're on the client activity list, click ▸ Notes on the blue navigation pane.



3. Hover over the  and click Review on the Miscellaneous Note you want to delete.



4. Confirm this is the correct miscellaneous note and click  .



5. Click  to delete the note or click  to cancel.

Deleting Client Referrals

Referrals in WITS are considered a part of the client's official electronic health record (EHR.) It is your agencies responsibility to ensure you are adhering to the documentation standards set forth by IDAPA.

All staff members who have permission to create a Referral record can also delete the record.

Deleting Vital Signs Records

Vital Signs in WITS are considered a part of the client's official electronic health record (EHR.) It is your agencies responsibility to ensure you are adhering to the documentation standards set forth by IDAPA.

All staff members who have permission to create a Vital Signs record can also delete the record.

Online Portal Requests for Behavioral Health Community Crisis Center Agency WITS Administrators

STANDARDS: **Online Portal Requests for Client Record Support, New or Updated User, and User Revocation can only be created by Agency WITS Administrators (AWAs).**

STANDARDS: **The Automation Help Desk staff will process an Online Portal Request within <u>three (3) business days</u> of it being received. When additional information is required, the Online Portal Request will be resolved within two (2) business days of receipt of the additional information. When additional information is requested, and a response is not received within five (5) business days, the Online Request will be closed, and the request will not be processed. The Online Portal will show you the status of the requests:**

- **Active – When the Online Portal request is being processed by the Help Desk.**
- **Waiting for Response – When there is a need of additional information or assistance from a vendor to resolve the request. An email will be sent to the AWA who submits the request if there is a need for additional information or if we are waiting for a resolution/assistance from a vendor.**
- **Closed – When the Online Portal request has been resolved.**

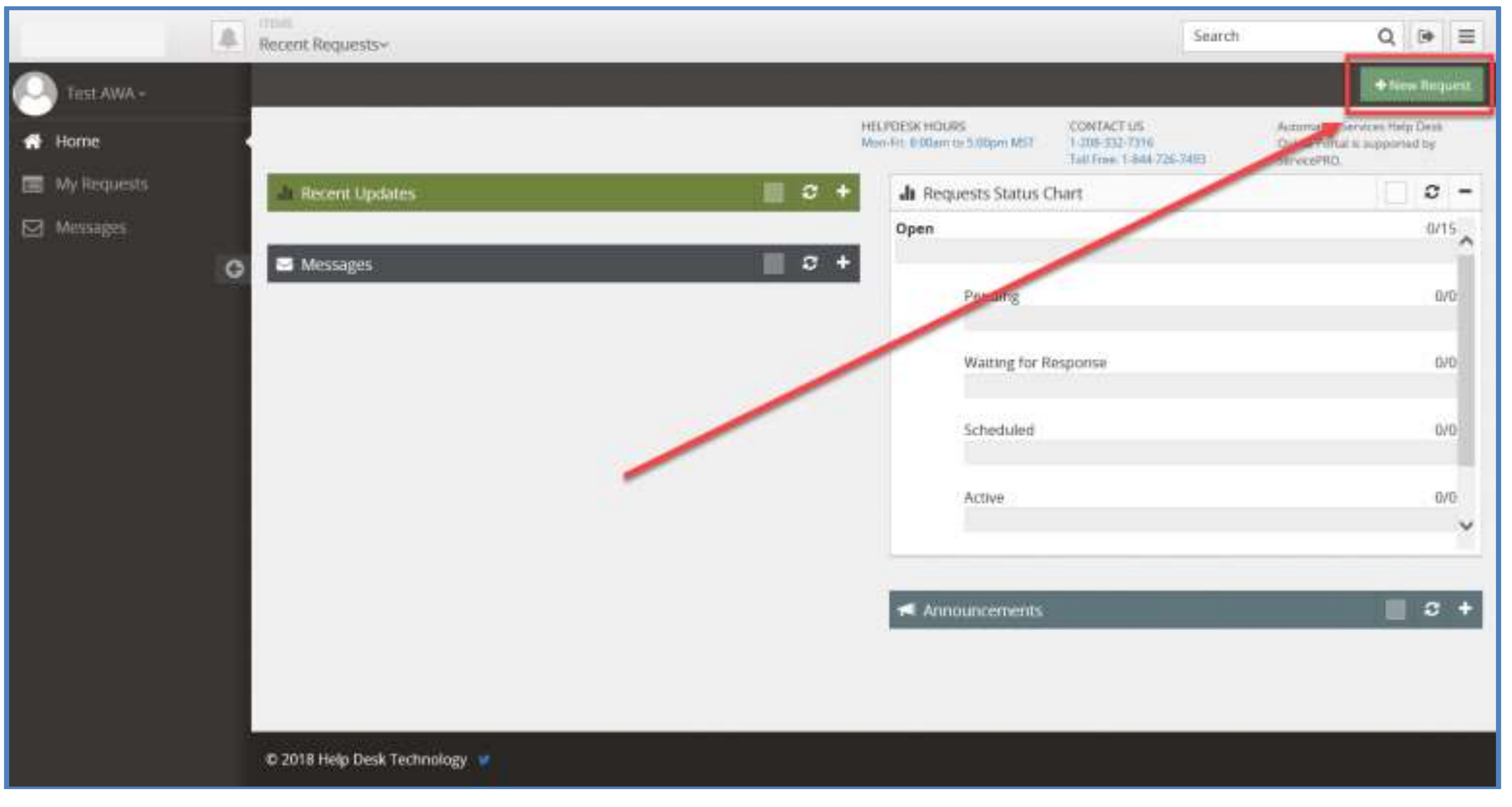
There are three (three) Categories for AWA – Agency WITS Administrator Online Portal Requests.

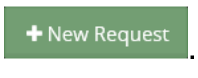
1. Client Record Support
   a. Request assistance with an individual client record (combining client records, delete client activities, etc.).
2. New or Updated User
   a. Document/request the creation or updating of staff member account (email changing, credential changes, permission changes, adding a staff member as an AWA, etc.).
3. User Revocation
   a. Document the revocation of a staff member (date of staff member's last day, etc.).

Client Record Support Online Portal Request

STANDARDS: Client Record Support requests can only be created by Agency WITS Administrators (AWAs). Client Record Support requests are created to request assistance with an individual client record (combine client records, delete client activities, etc.)

1. Log into the Online Portal.



2. Click 

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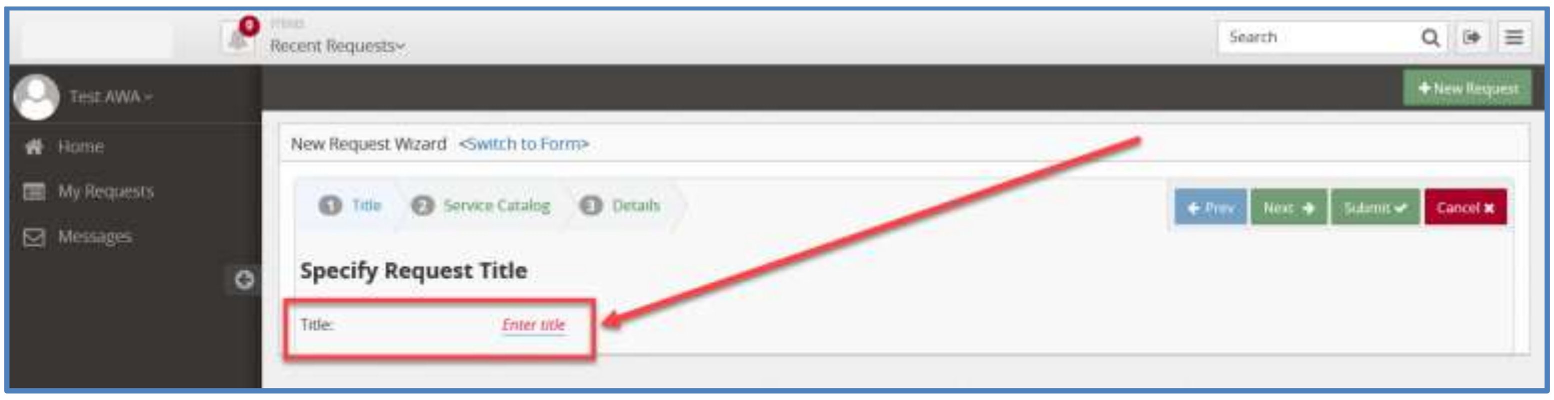
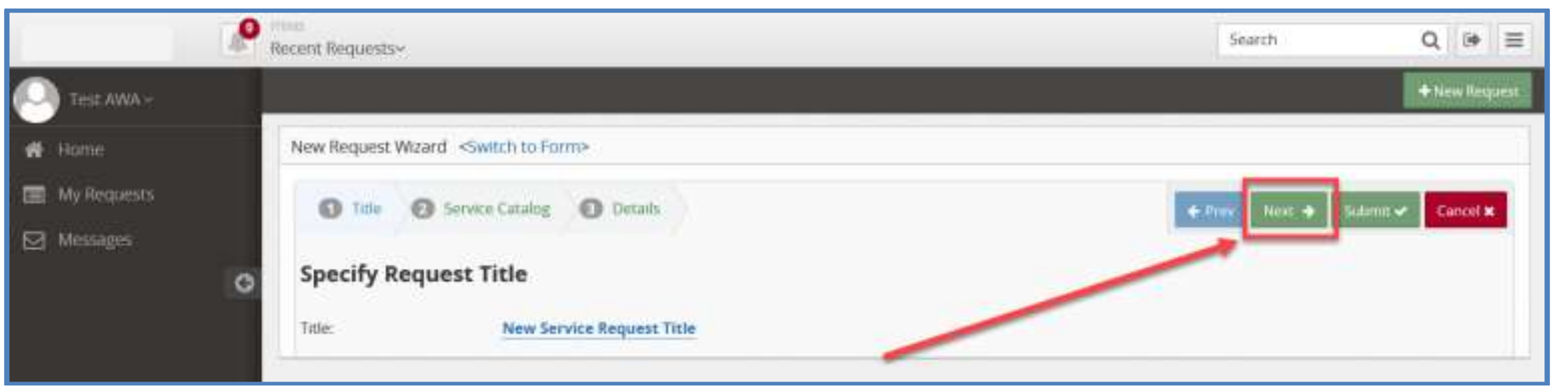
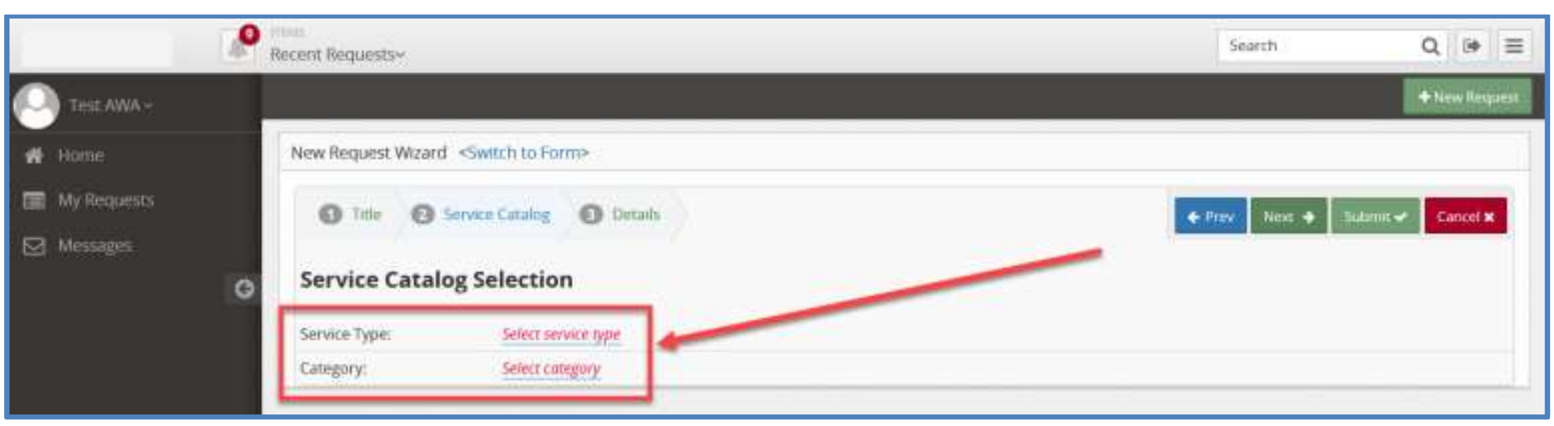


3. Click Enter title and enter the purpose of your request.

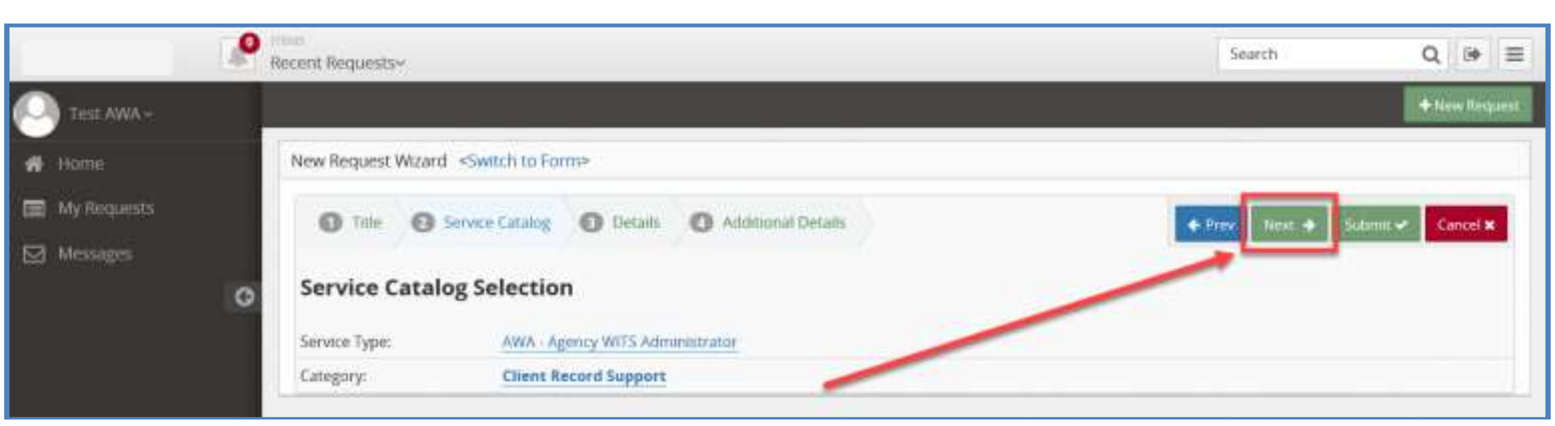


4. Click Next.



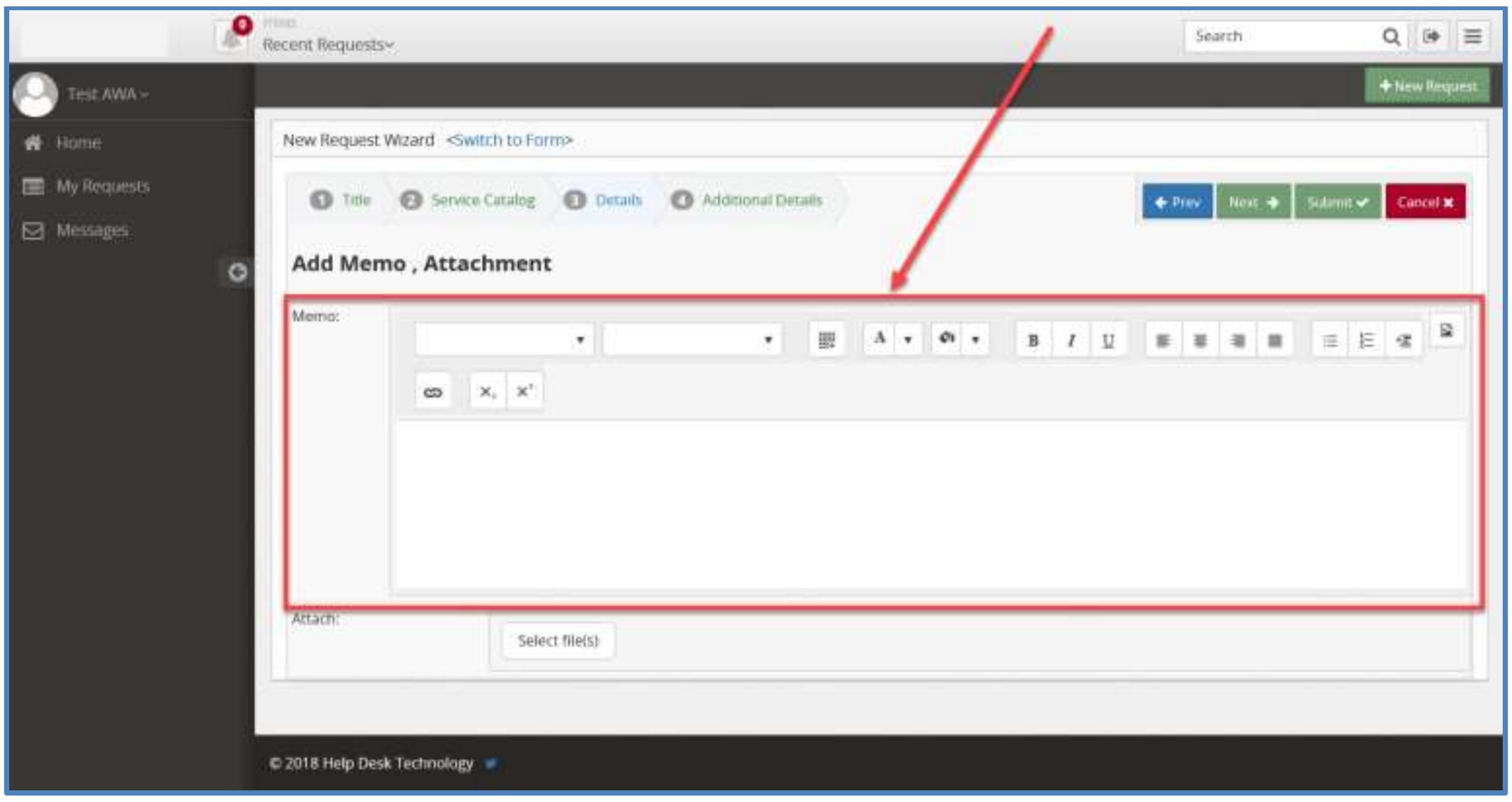
5. Click Select service type and select **AWA - Agency WITS Administrator**.

6. Click Select category and select **Client Record Support**.

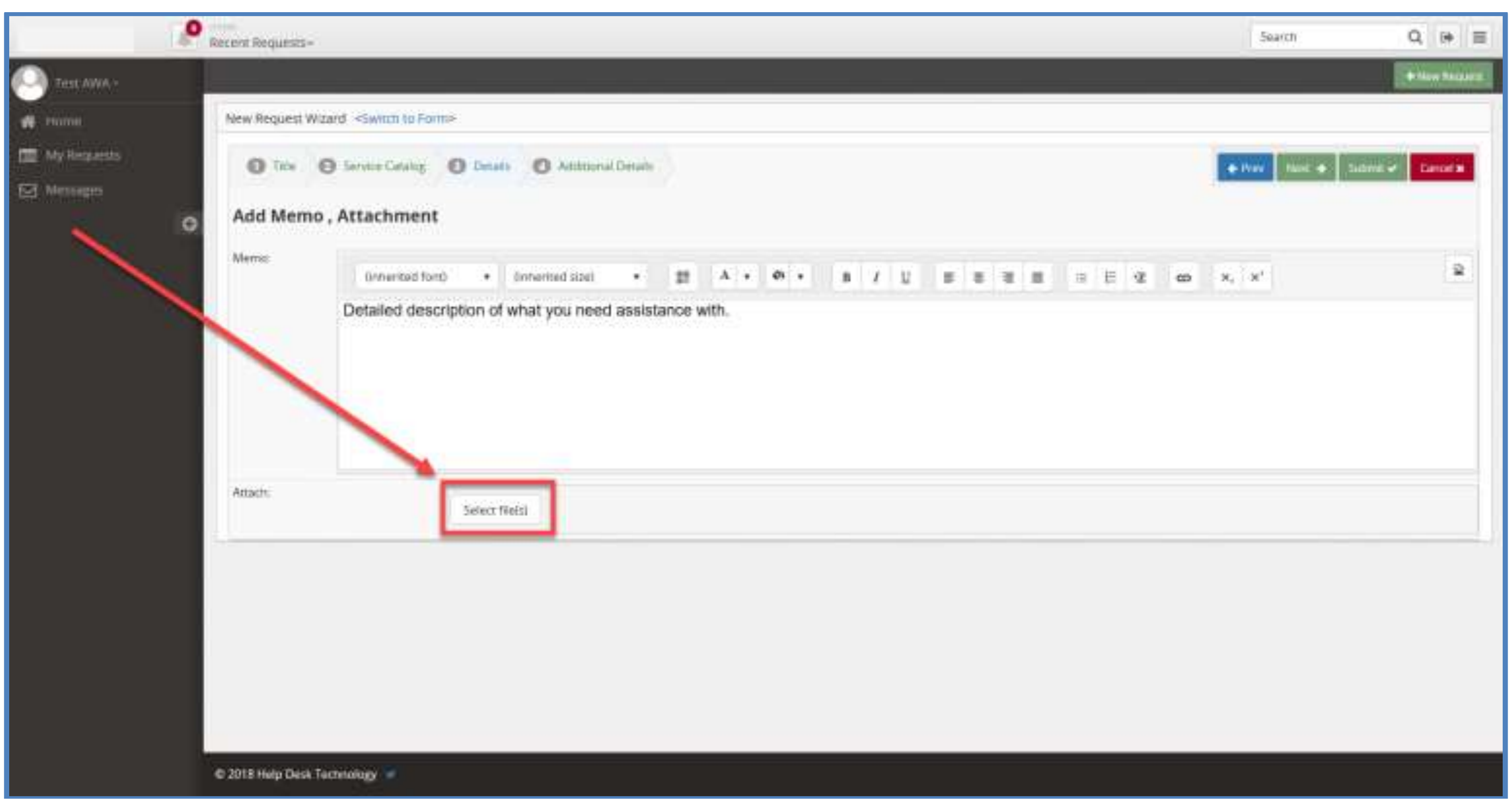


7. Click Next.

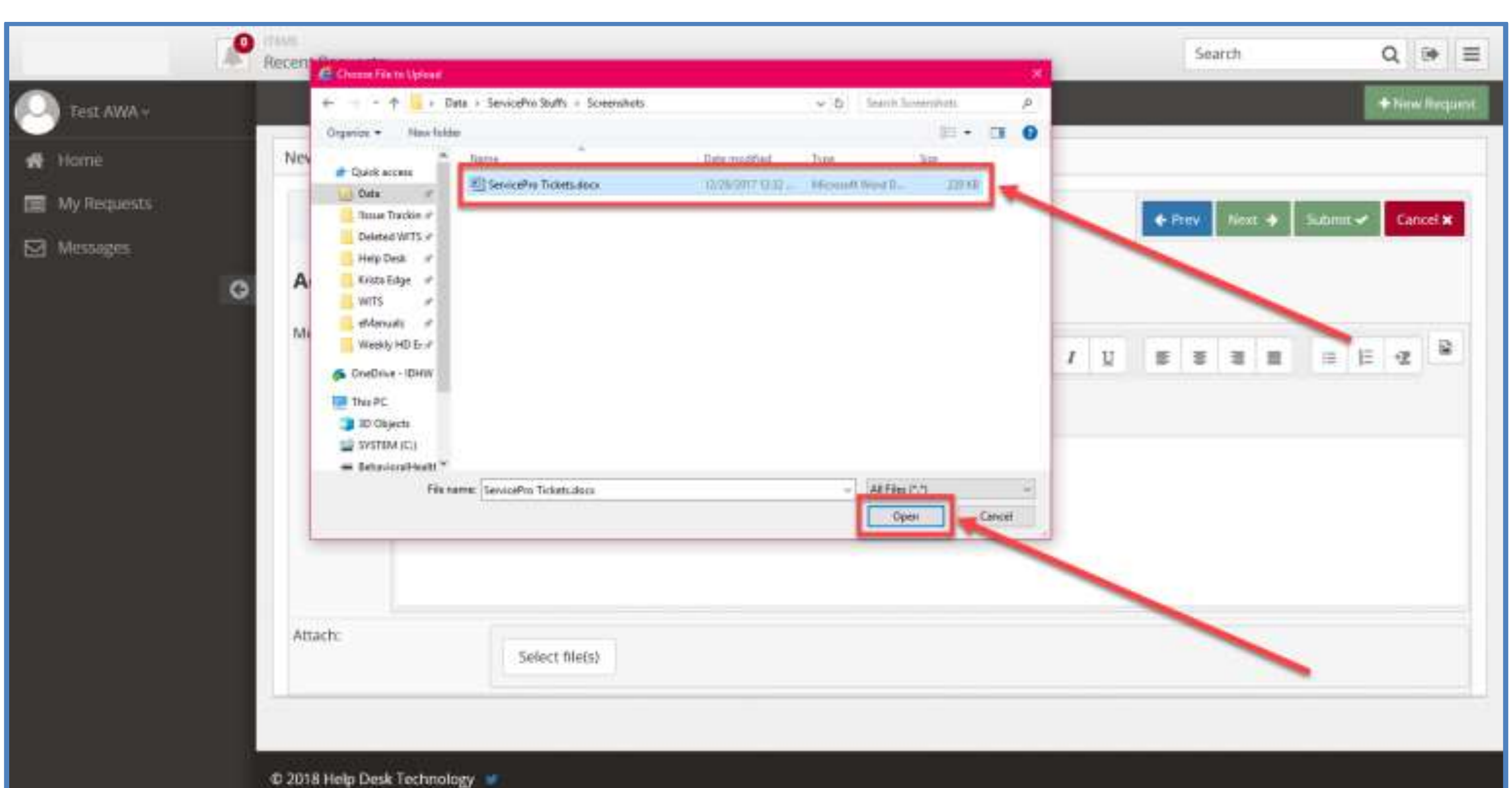
WARNING: **Never enter Protected Health Information into a service request. Always refer to clients by their Unique Client Number (UCN) found in WITS on the Client Profile.**



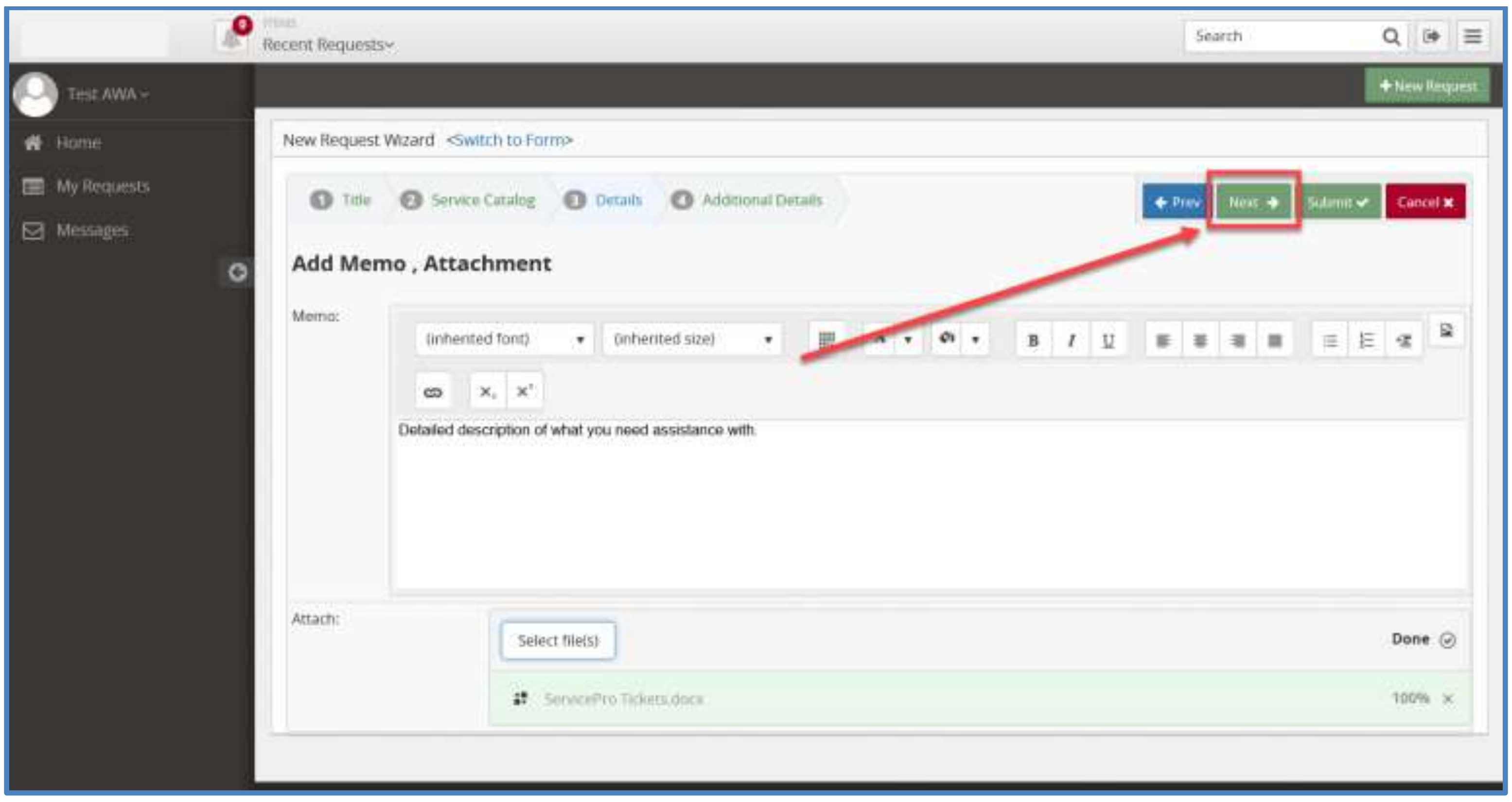
8. Enter a detailed description in the Memo field for this request. **Do not enter any Protected Health Information (including the Client Name) into the service request.**



9. Click Select file(s) to attach a file if necessary.

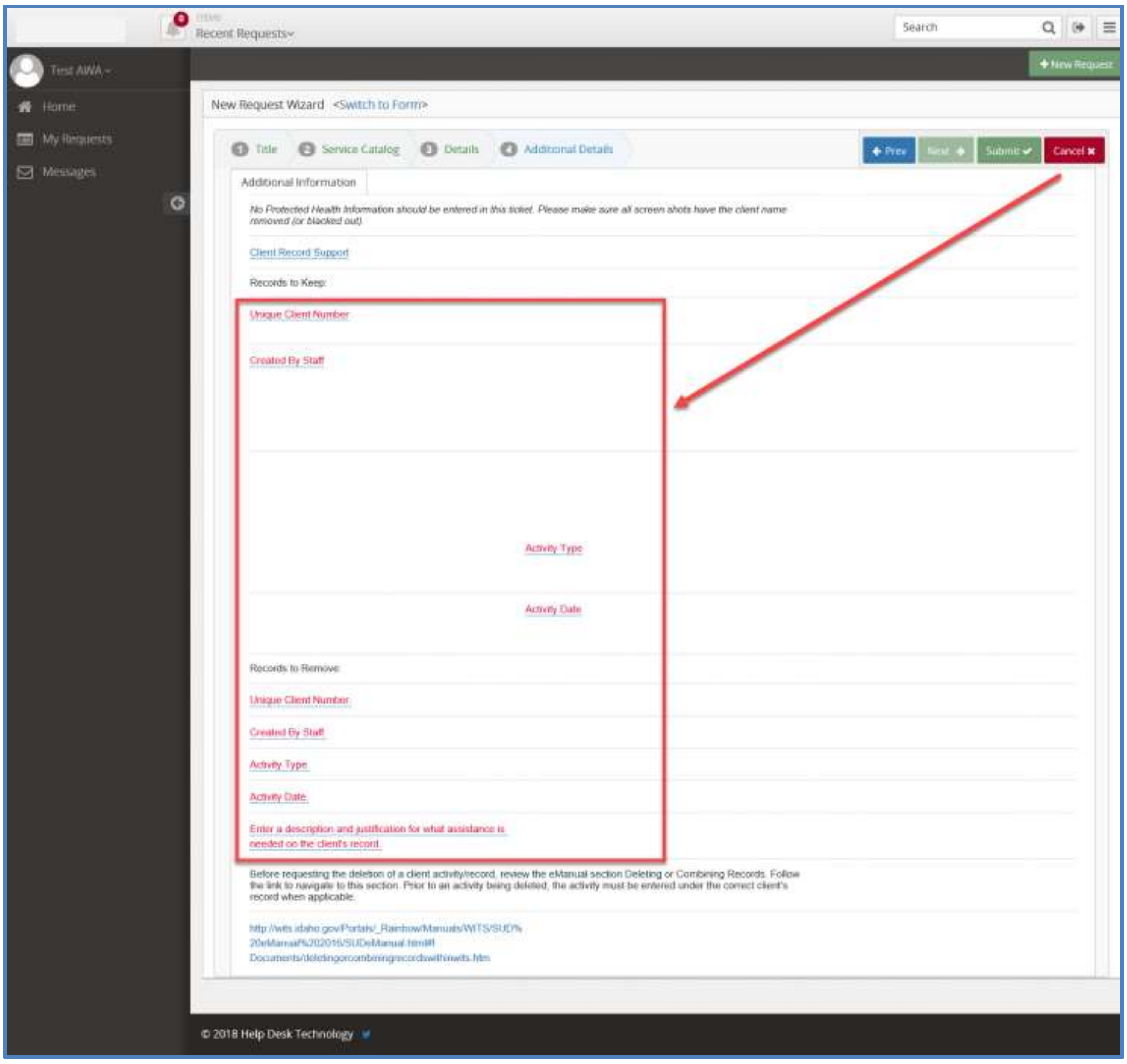


10. Navigate to the file and click Open. **Before attaching a screen shot, make sure the client name is removed (or blacked out).**

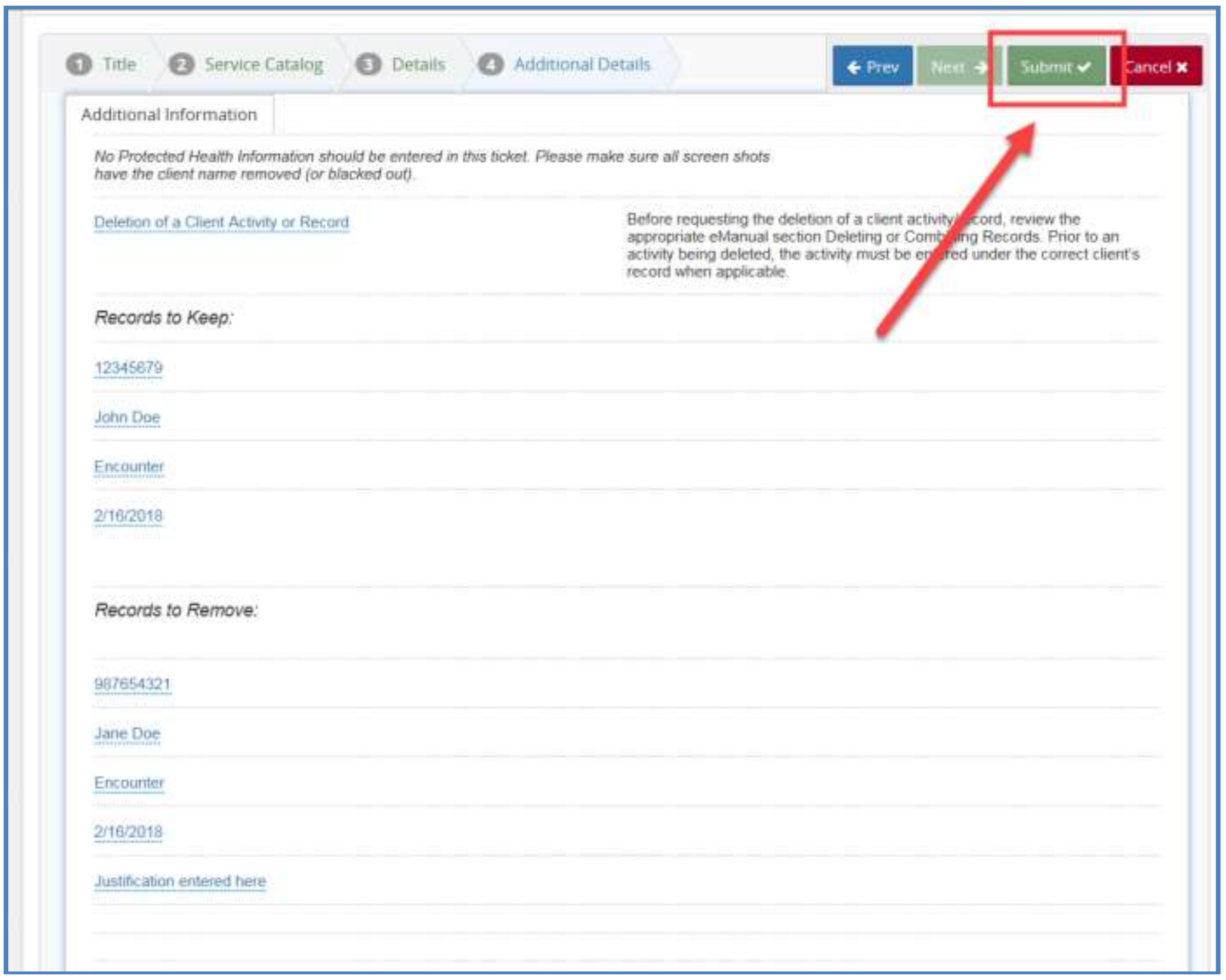


11. Click Next.

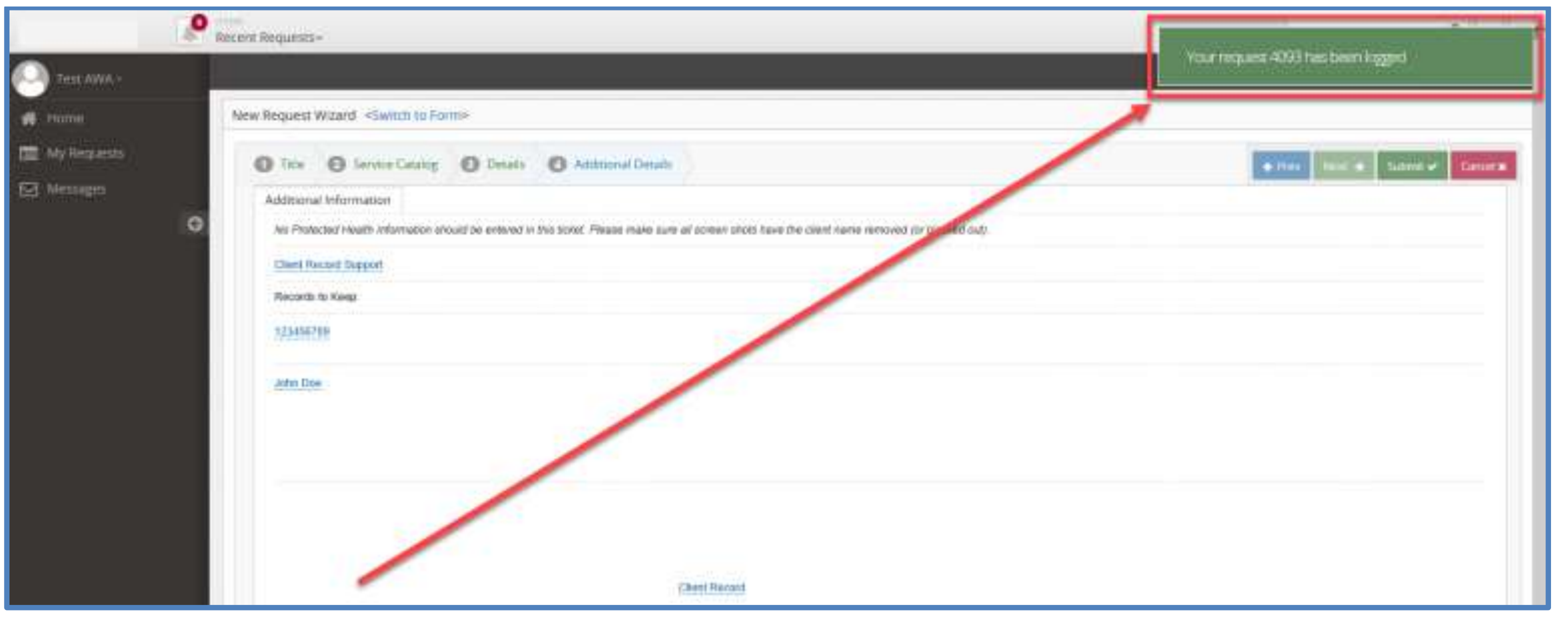
12. Click Action and select **Client Record Support**.



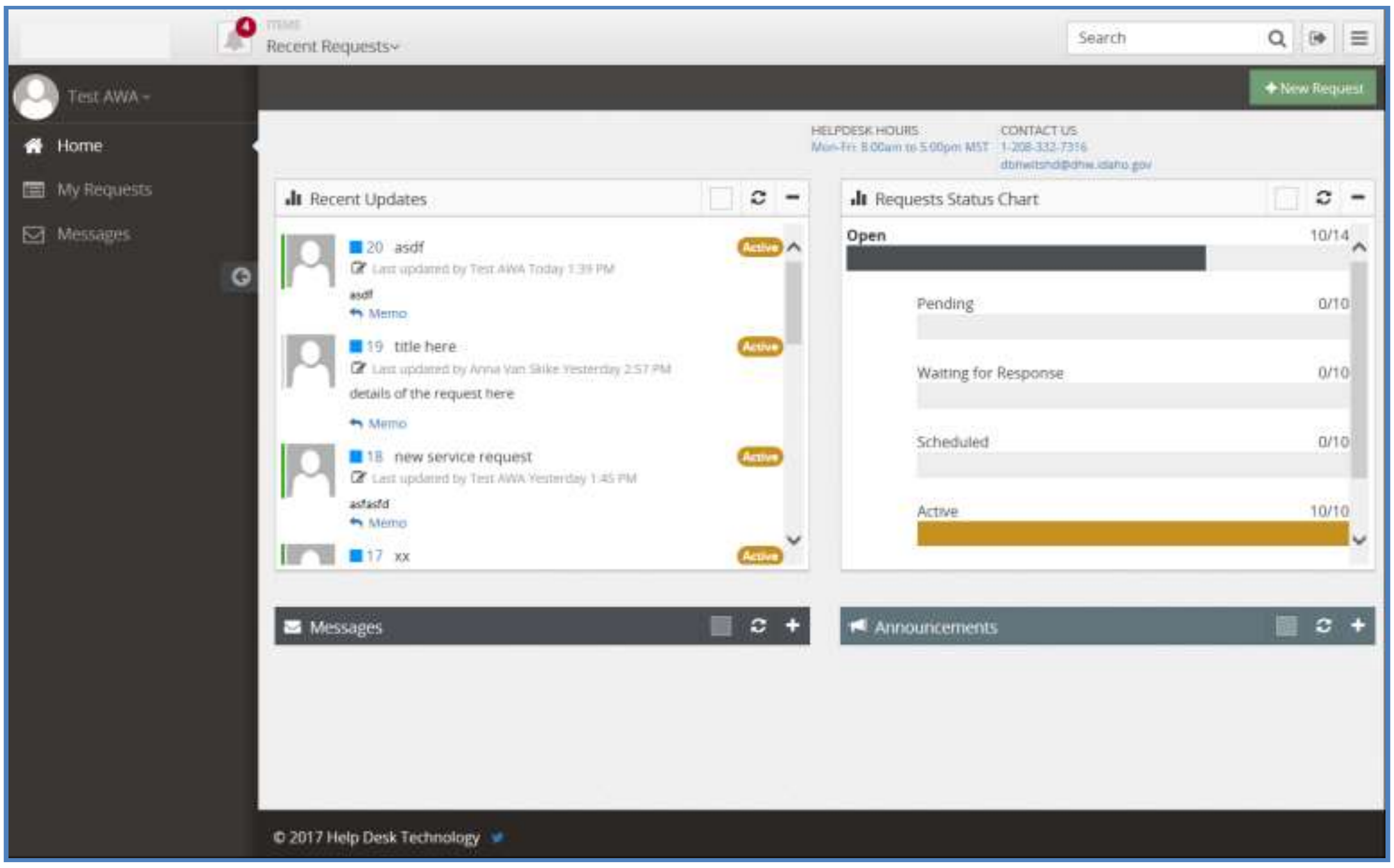
13. Complete the following fields as needed.
    - Records to Keep:
        - Unique Client Number – enter the UCN of the client.
        - Created By Staff – enter the name of the Staff Member who created the client activity to be kept.
        - Activity Type – enter the type of Activity.
        - Activity Date – enter the date of the Activity.
    - Records to Remove:
        - Unique Client Number – enter the UCN of the client.
        - Created By Staff – enter the name of the Staff Member who created the client activity to be deleted.
        - Activity Type – enter the type of Activity.
        - Activity Date – enter the date of the Activity.
    - Justification – enter a justification for the client record support (i.e., record was entered in error) and indicate the activity was entered under the correct client's record when applicable.



14. Click .



15. A confirmation message will appear in green with the Service Request Number.



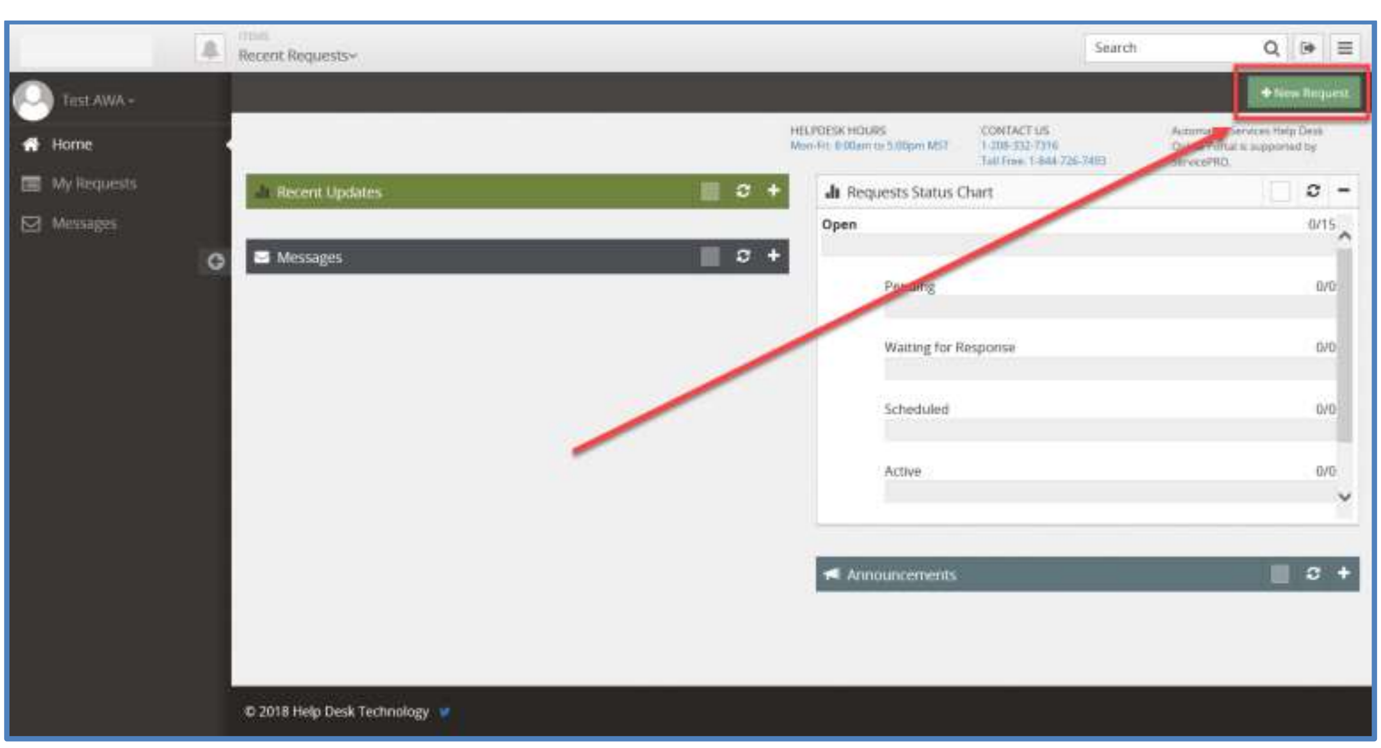
16. You are automatically navigated back to the Home Page.

17. Help Desk staff will process the Online Portal Request according to the SLAs.

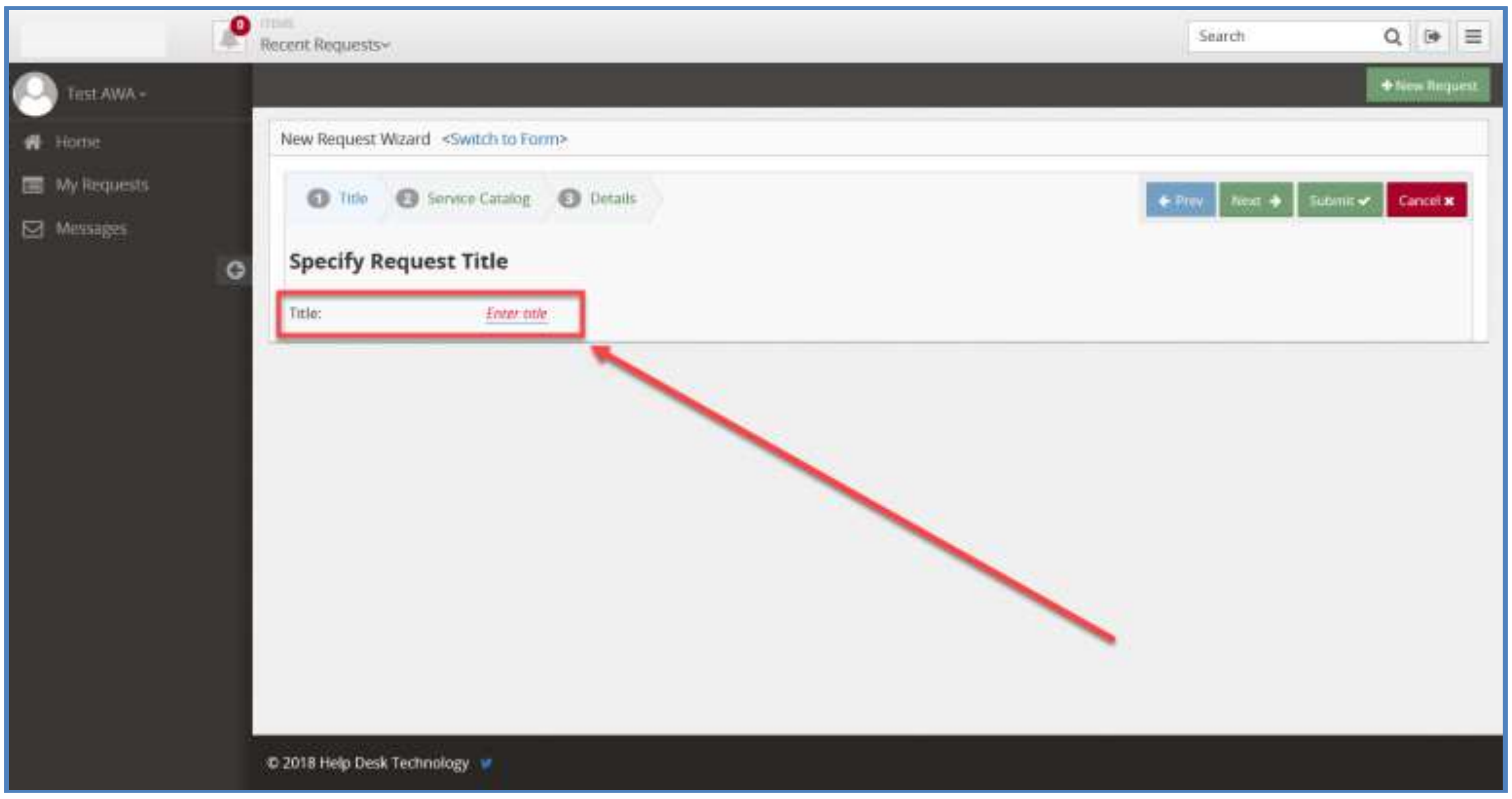
New or Updated User Online Portal Request

STANDARDS: **New or Updated User requests can only be created by Agency WITS Administrators (AWAs). New or Updated User requests are created to document/request the creation or updating of staff member account (email changing, credential changes, permission changes, adding a staff member as an AWA, etc.) and attach the signed Idaho WITS User Agreement or the Idaho WITS Revocation Form within five (5) business days of creating/revoking a the WITS staff member account.**

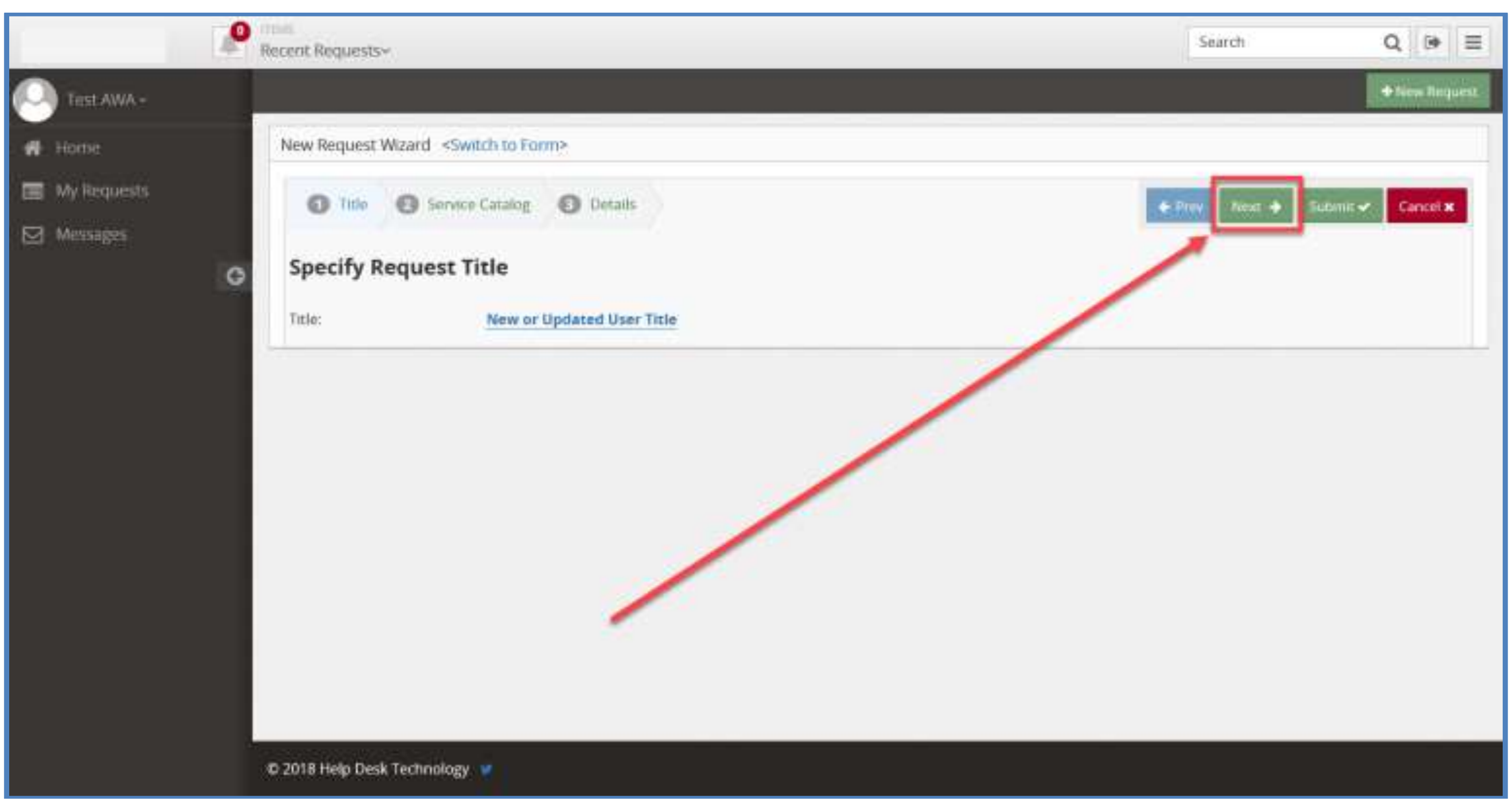
1. Log into the Online Portal. Click here for instructions to access the Online Portal.



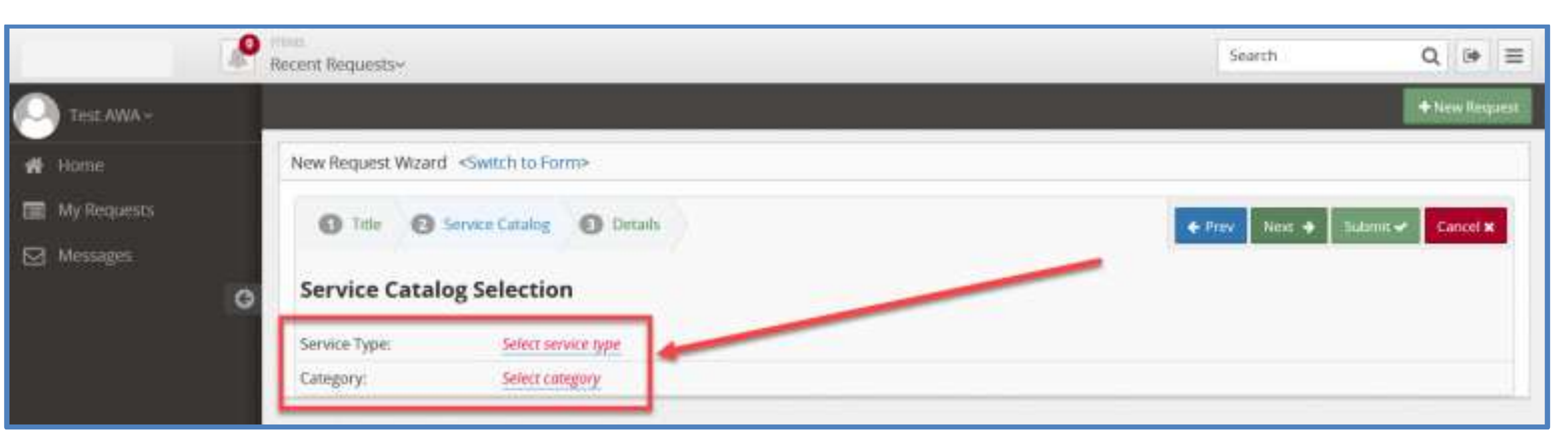
2. Click  .



3. Click Enter title and enter the purpose of your request.

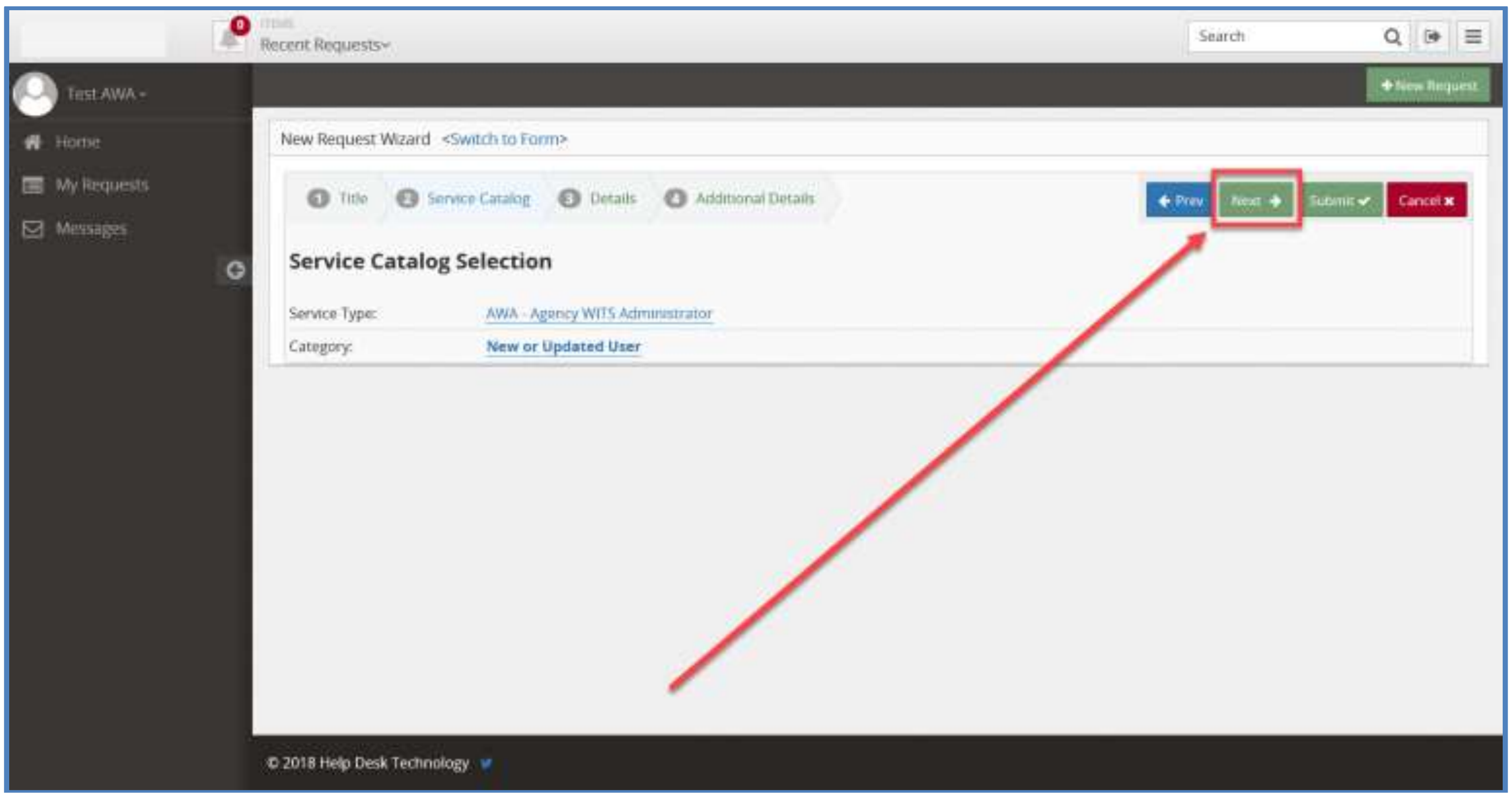


4. Click Next .

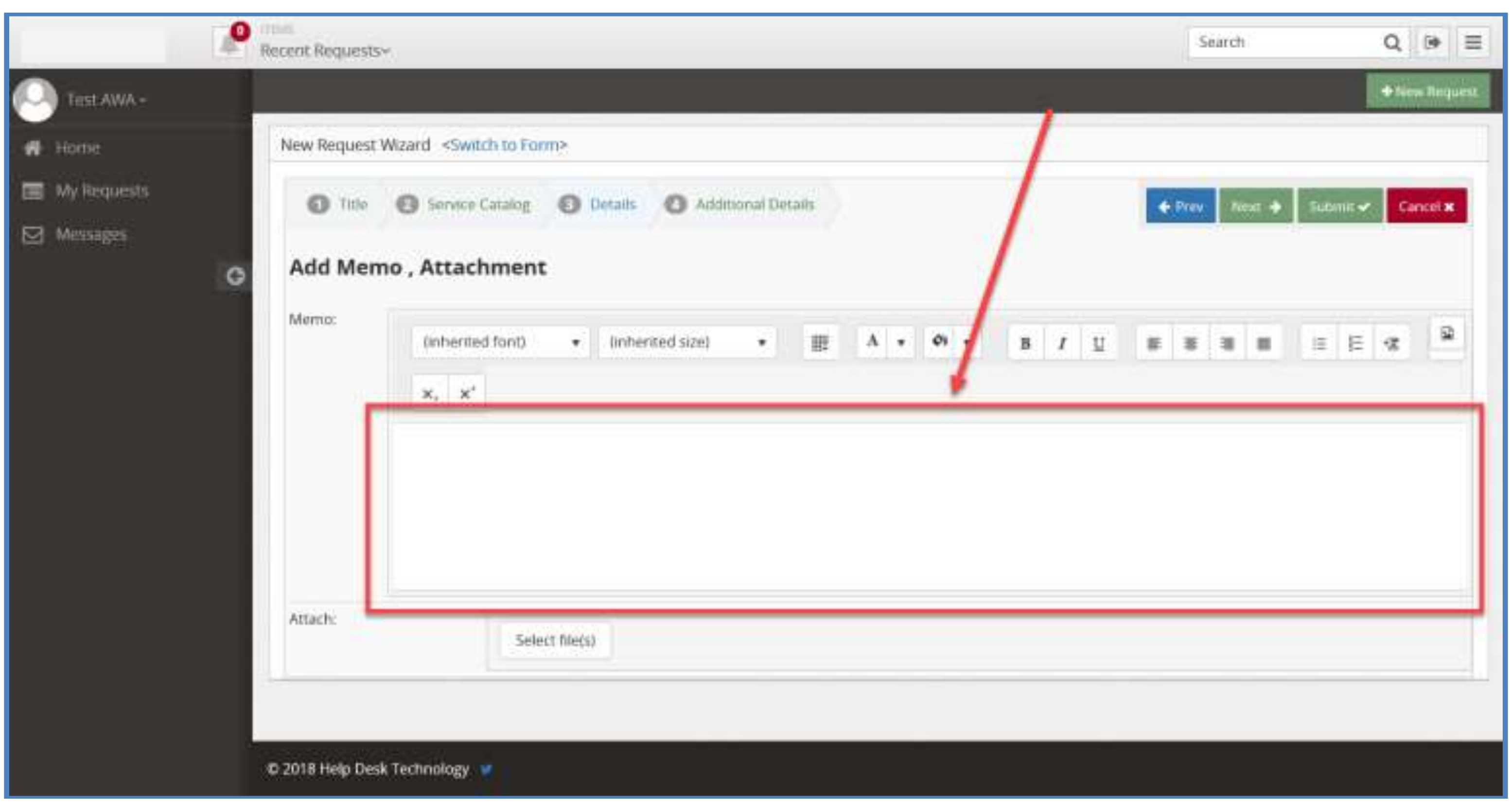


5. Click Select service type and select **AWA - Agency WITS Administrator**.

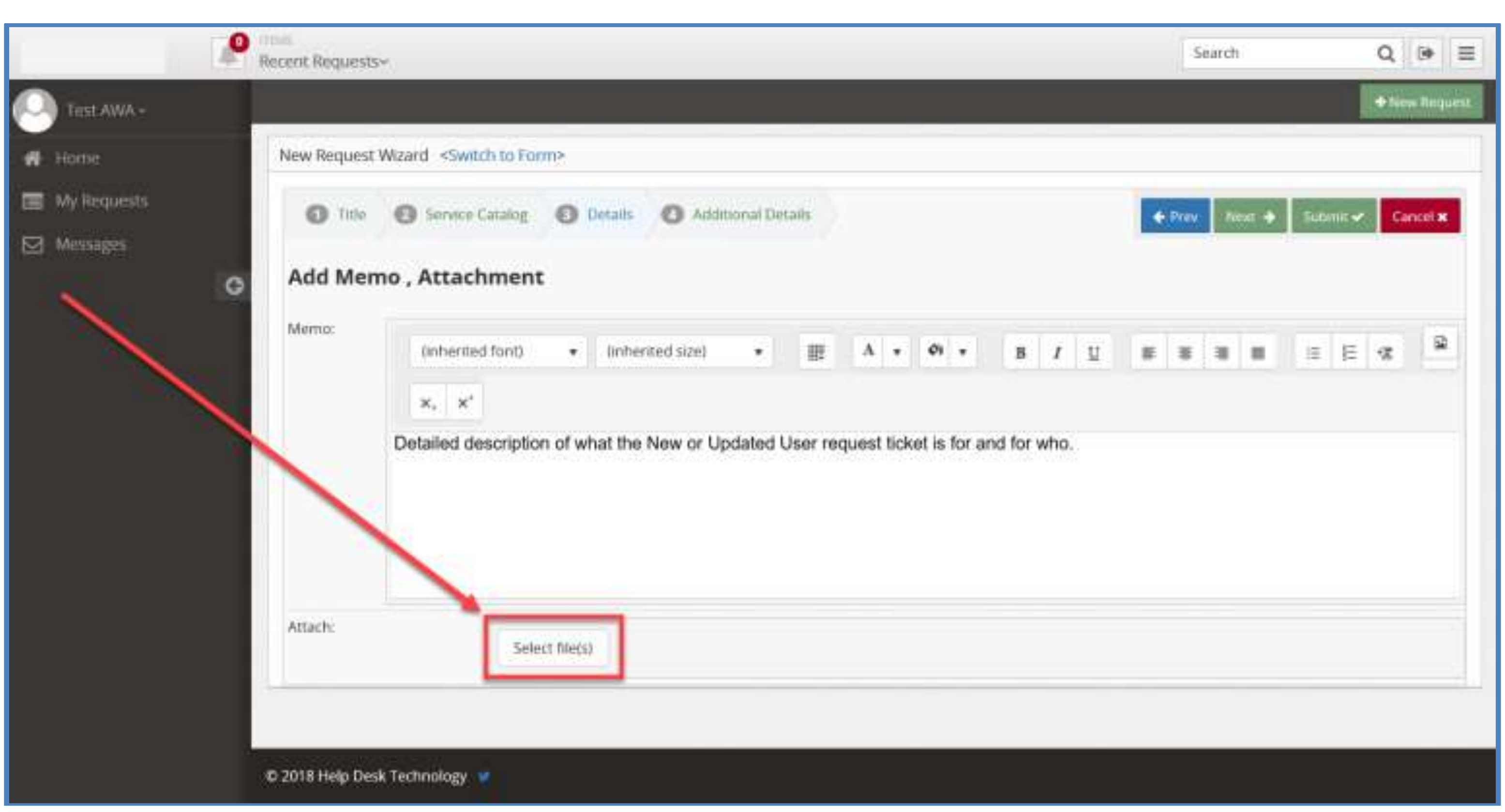
6. Click Select category and select **New or Updated User**.



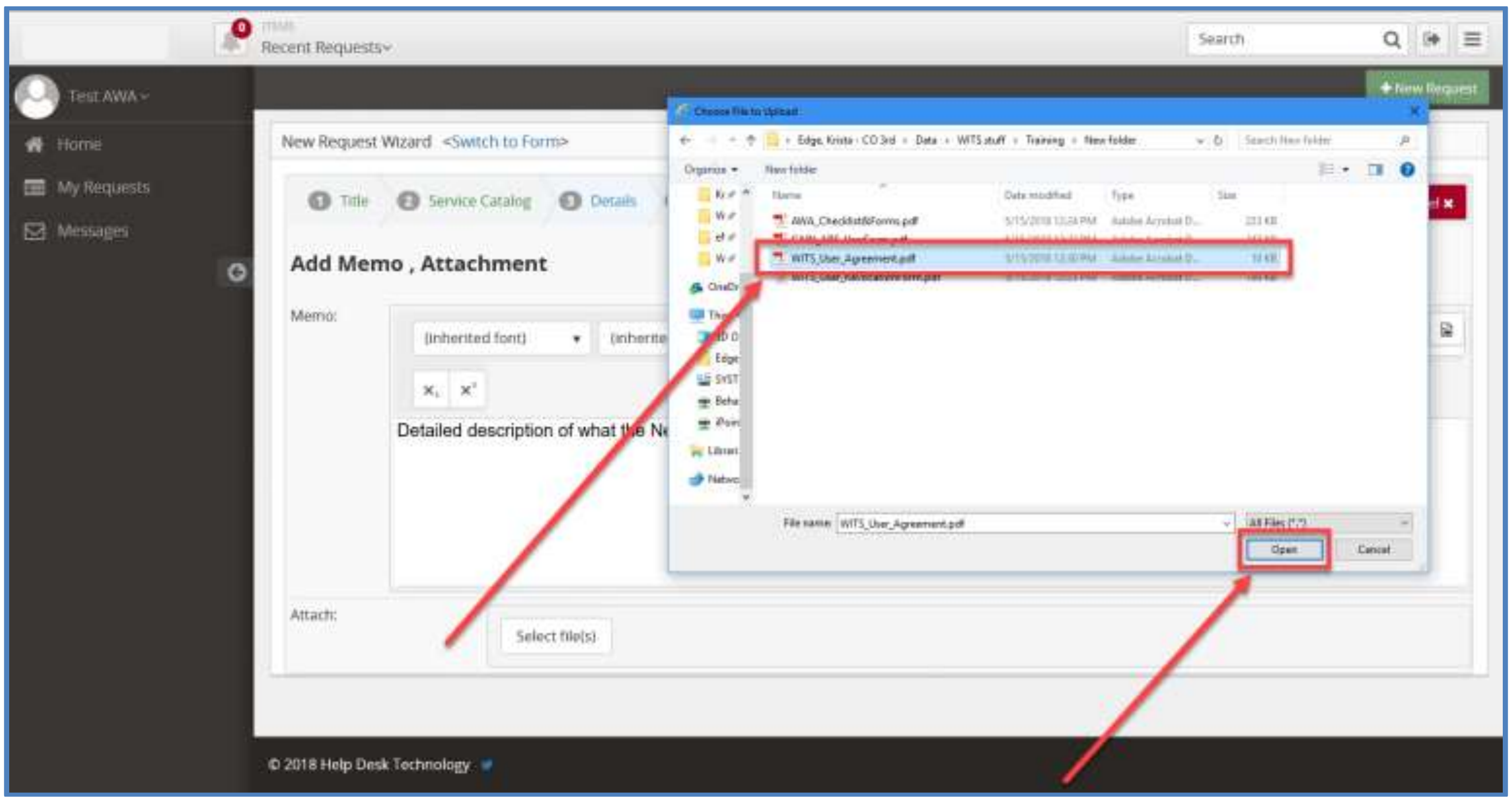
7. Click Next.



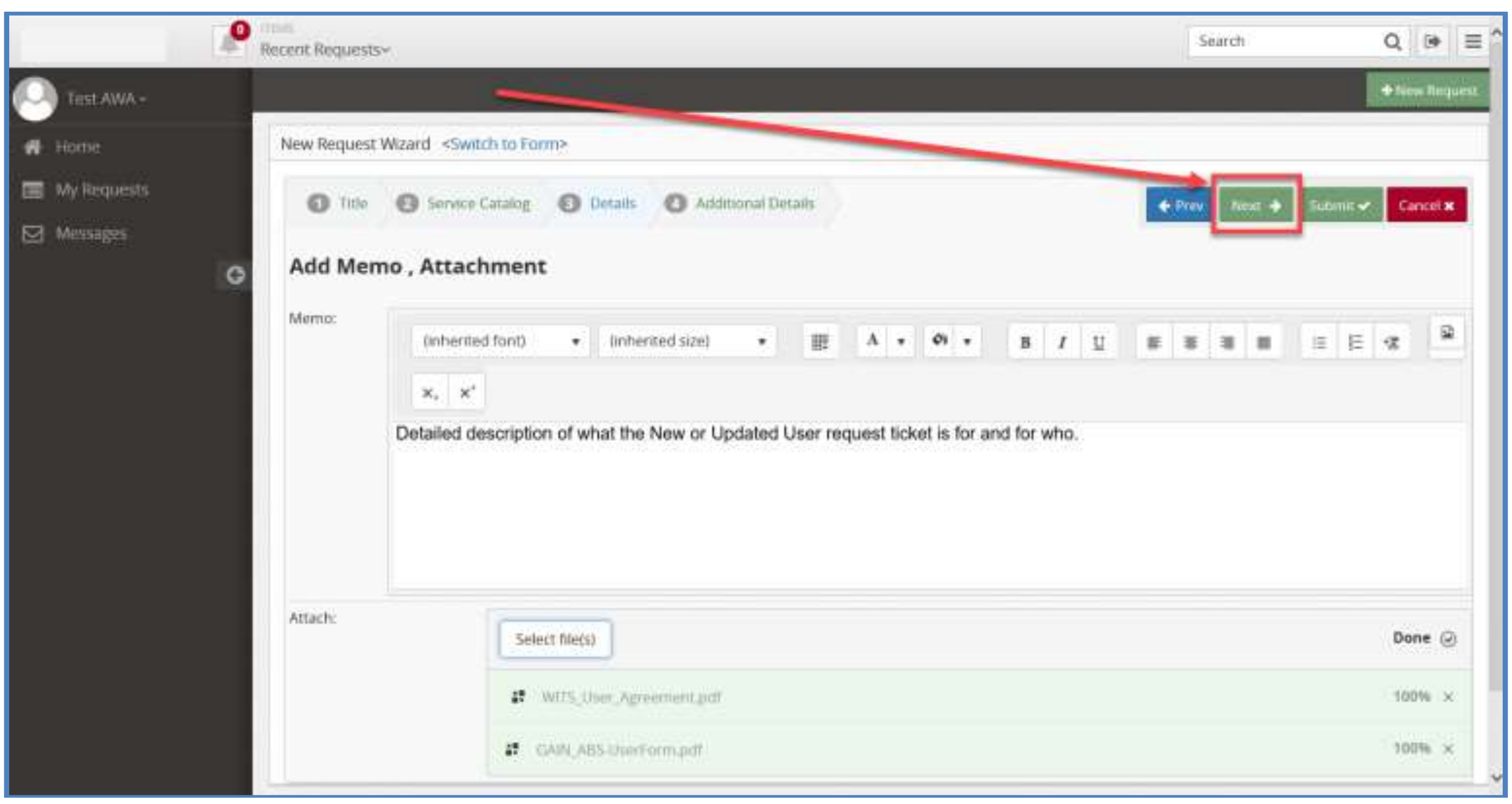
8. Enter a detailed description in the Memo field for this request.



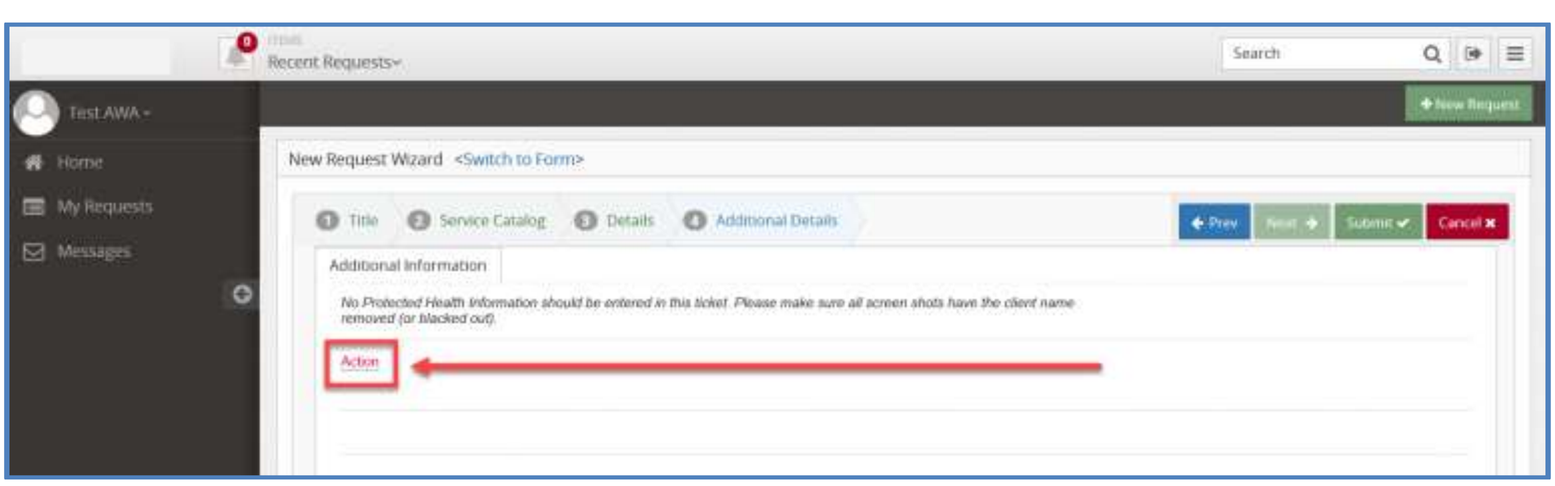
9. Click Select file(s) to attach a file(s) if necessary.



10. Navigate to the file and click Open.



11. Click Next.

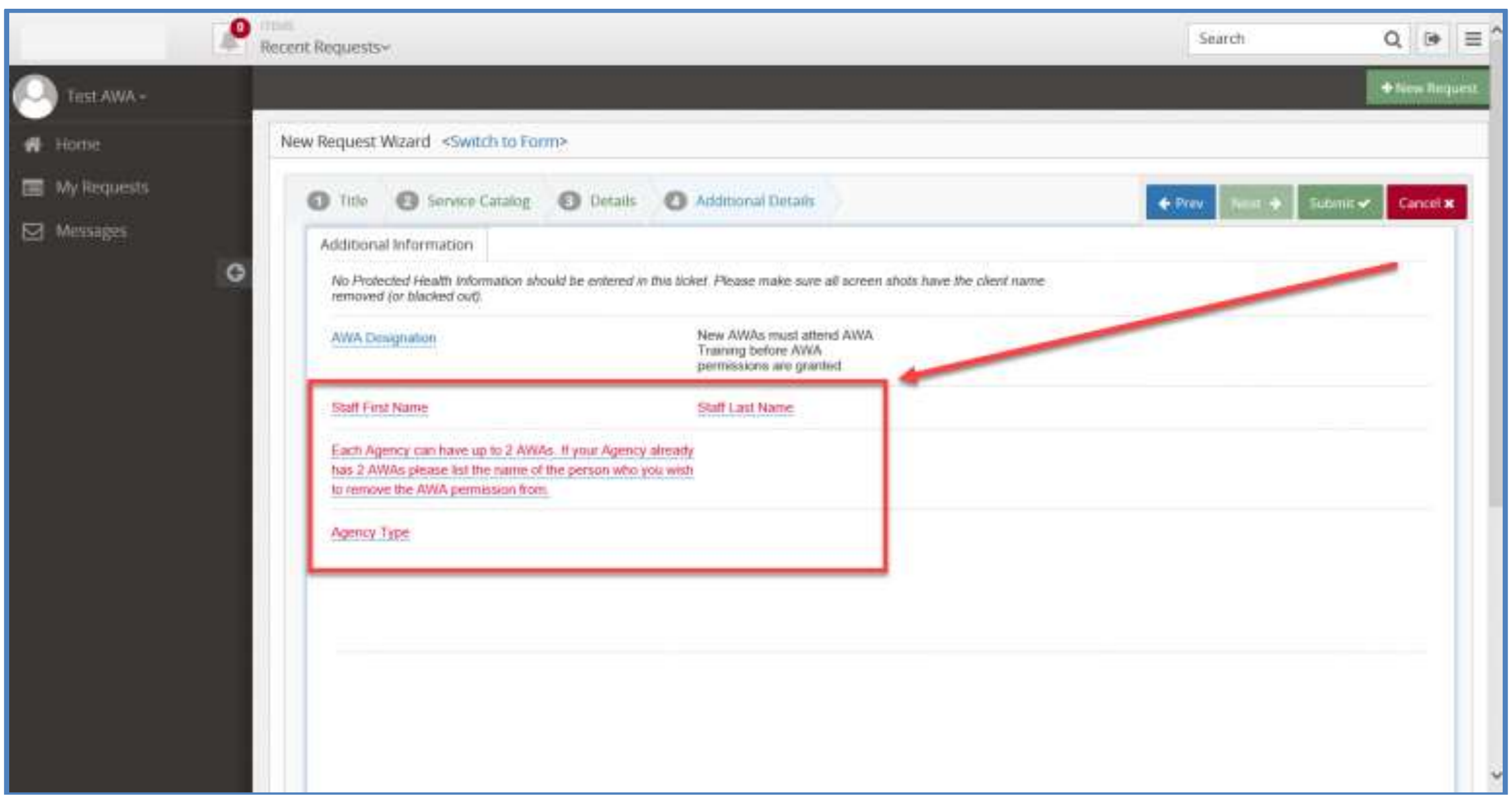


12. Click Action and select the appropriate Action choice.
    - AWA Designation – designate a current staff member as one of the agency's two AWAs.
    - New User – new staff member for agency.
    - Update User – choice if the staff member account has been updated (email changing, credential changes, permission changes, adding a staff member as an AWA, etc.)

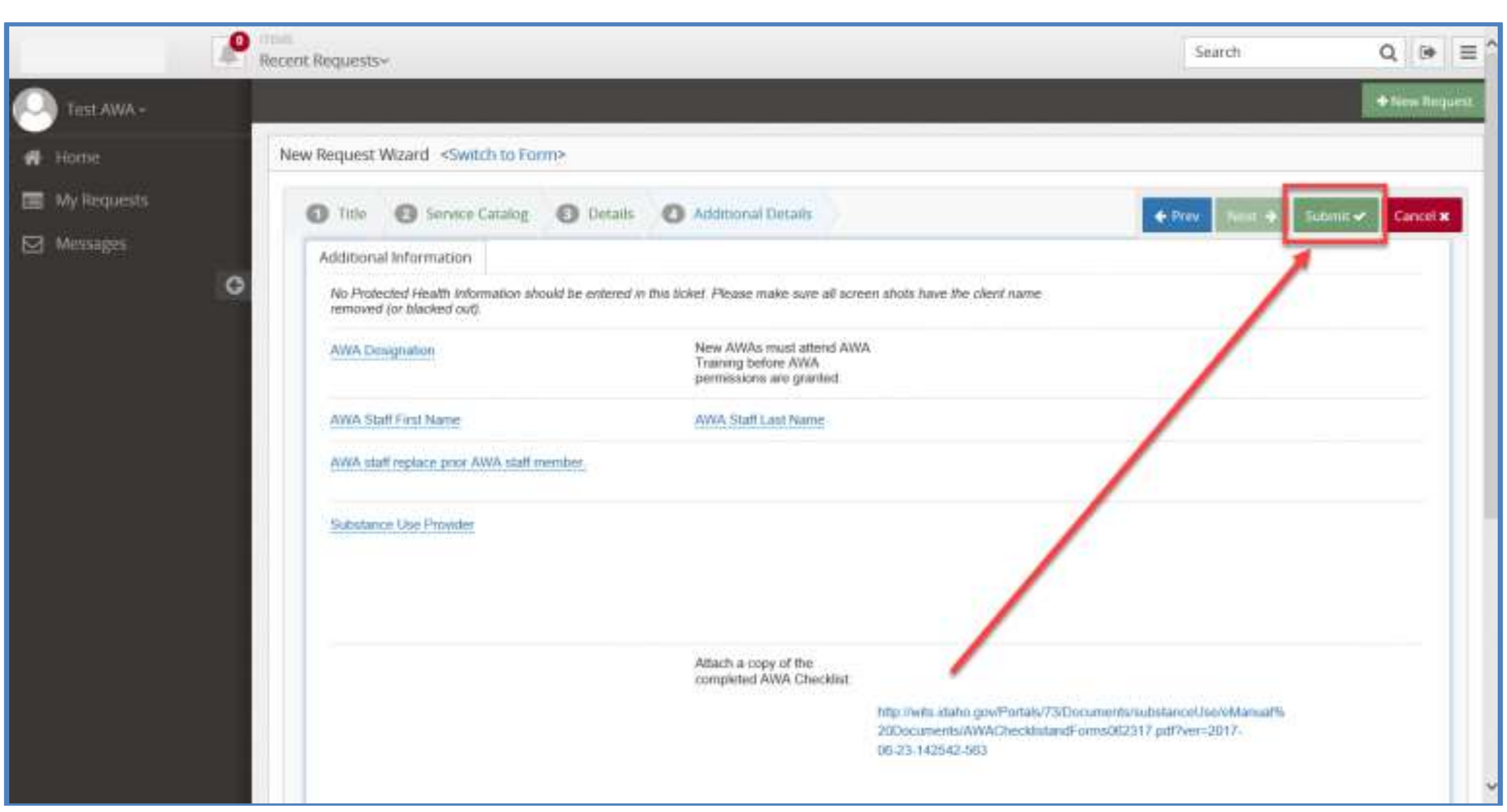
Action of AWA Designation

STANDARDS: **Each Agency may designate up to two individuals as AWAs. New AWAs must attend BHCCC AWA Training before AWA permissions are granted. BHCCC AWA trainings are provided upon request; contact the Help Desk to request a training**.

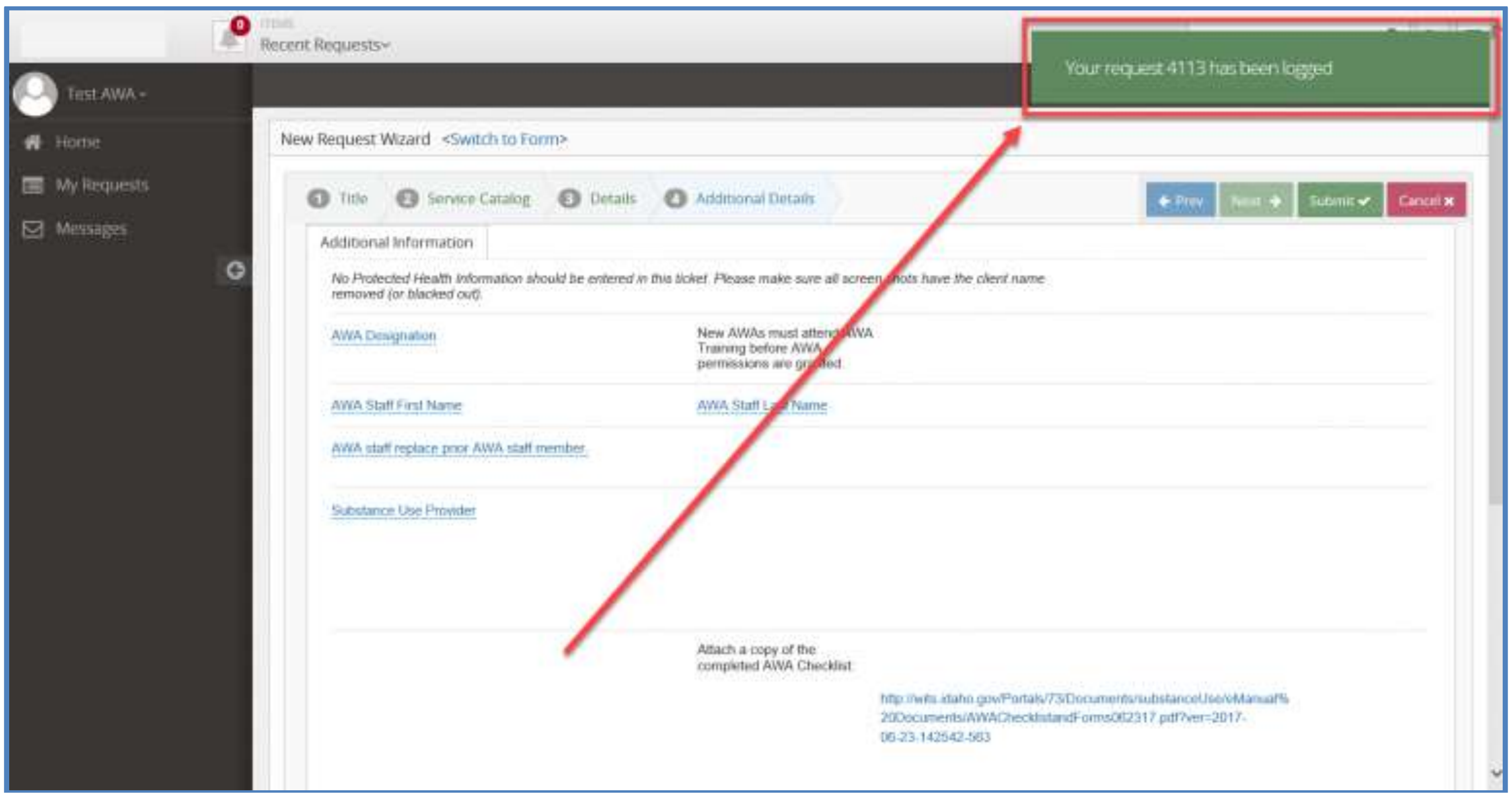
1. Click Action and select **AWA Designation.**



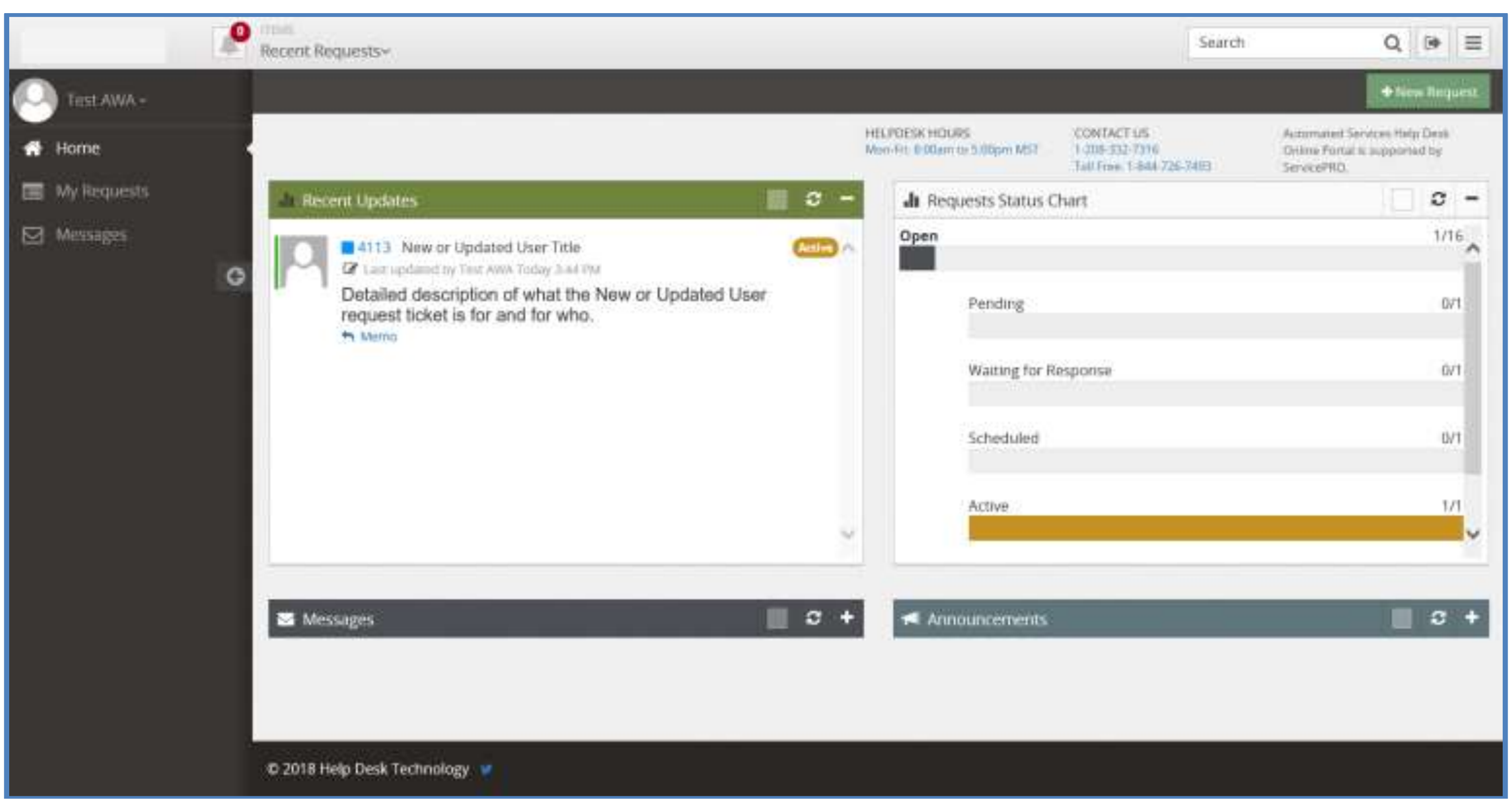
2. Complete the following fields.
    - Staff First Name – first name of staff member being designated as AWA.
    - Staff Last Name – last name of staff member being designated as AWA.
    - If Agency already has 2 AWAs – enter the name of the AWA being replaced by the new AWA.
    - Agency Type – select Substance Use Provider.



3. Click Submit ✔.



4. A confirmation message will appear in green with the Service Request Number.

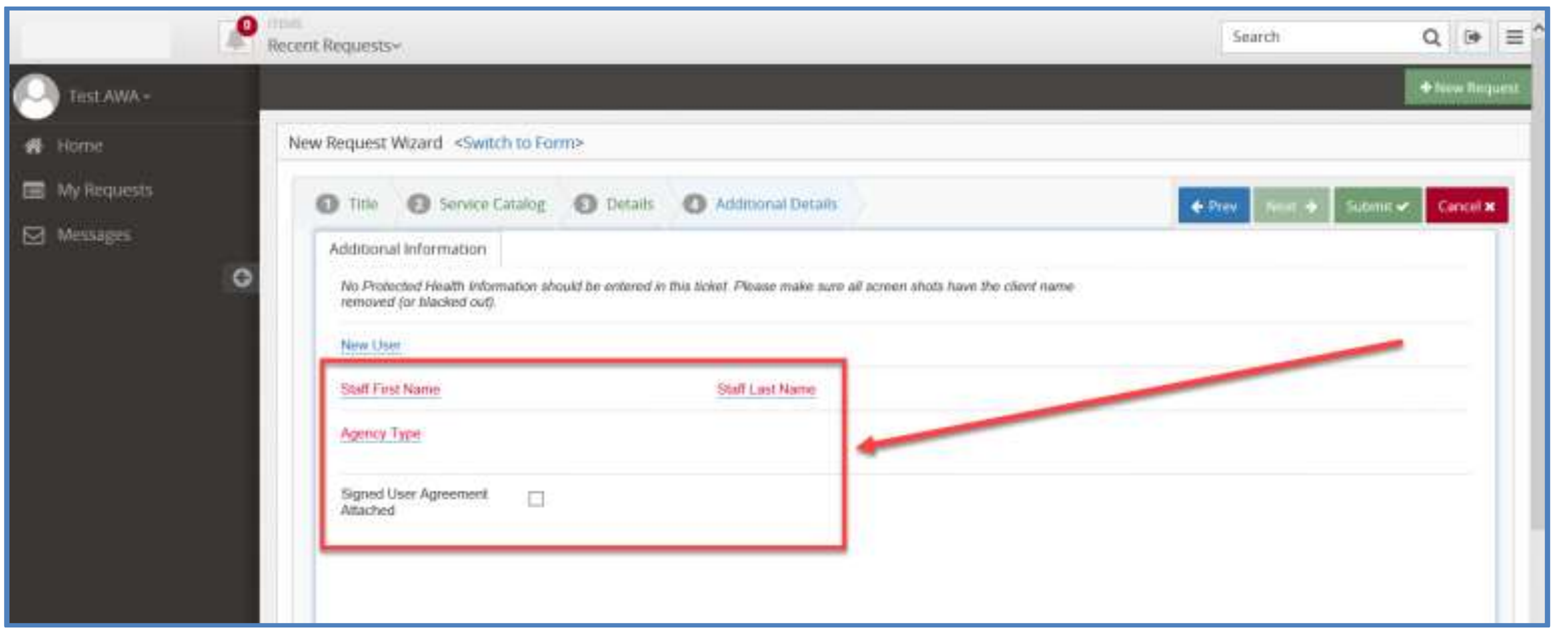


5. You are automatically navigated back to the Home Page.

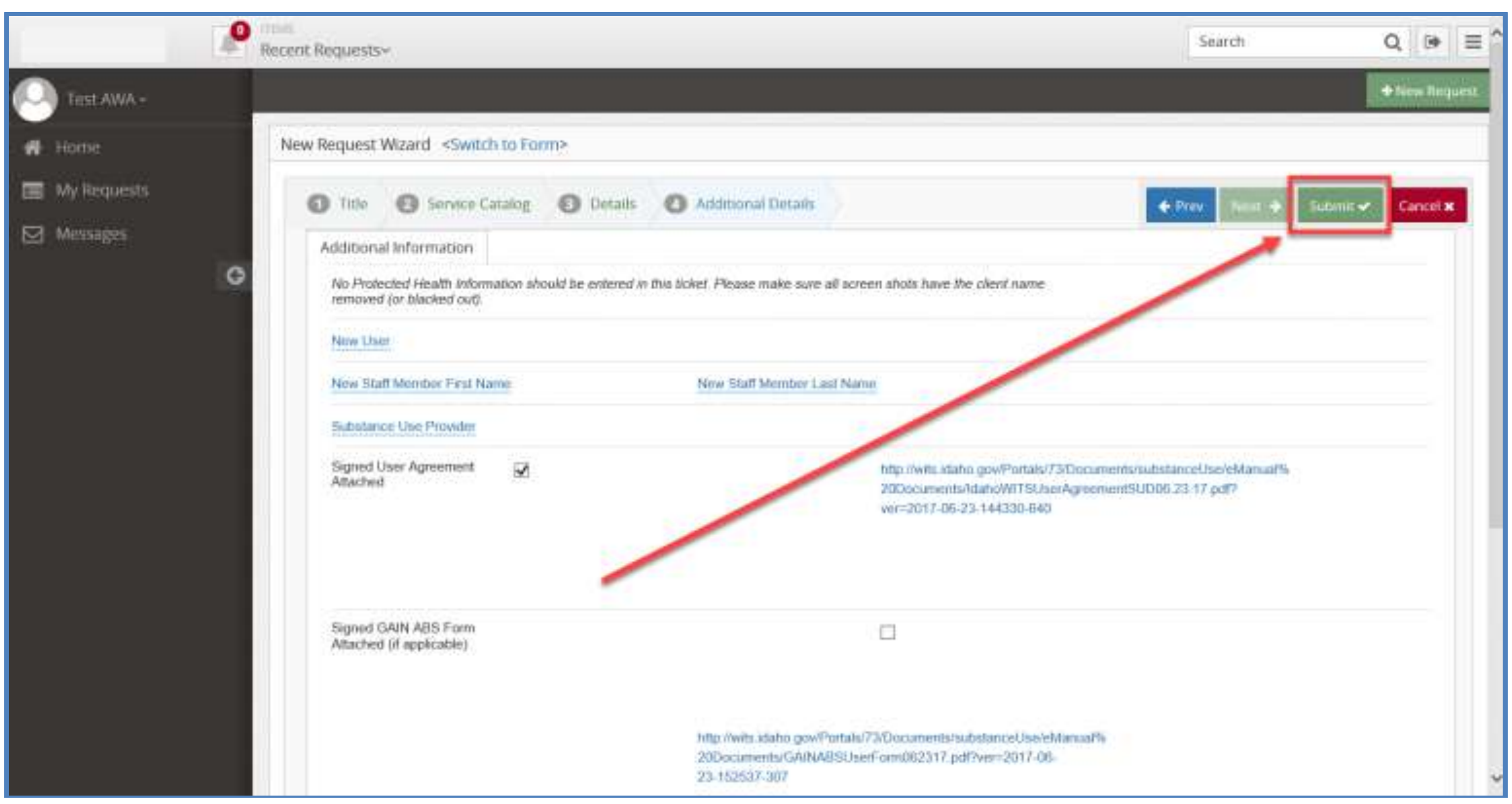
Action of New User

STANDARDS: **Create one request for each individual user. Always attach the completed and signed WITS User Agreement for the user.**

1. Click Action and select **New User.**



2. Complete the following fields.
    - Staff First Name – enter the first name of new WITS user.
    - Staff Last Name – enter the last name of new WITS user.
    - Agency Type – select Substance Use Provider.
    - Signed User Agreement Attached – select box for WITS User Agreement form being attached to Online Portal request.



3. Click 

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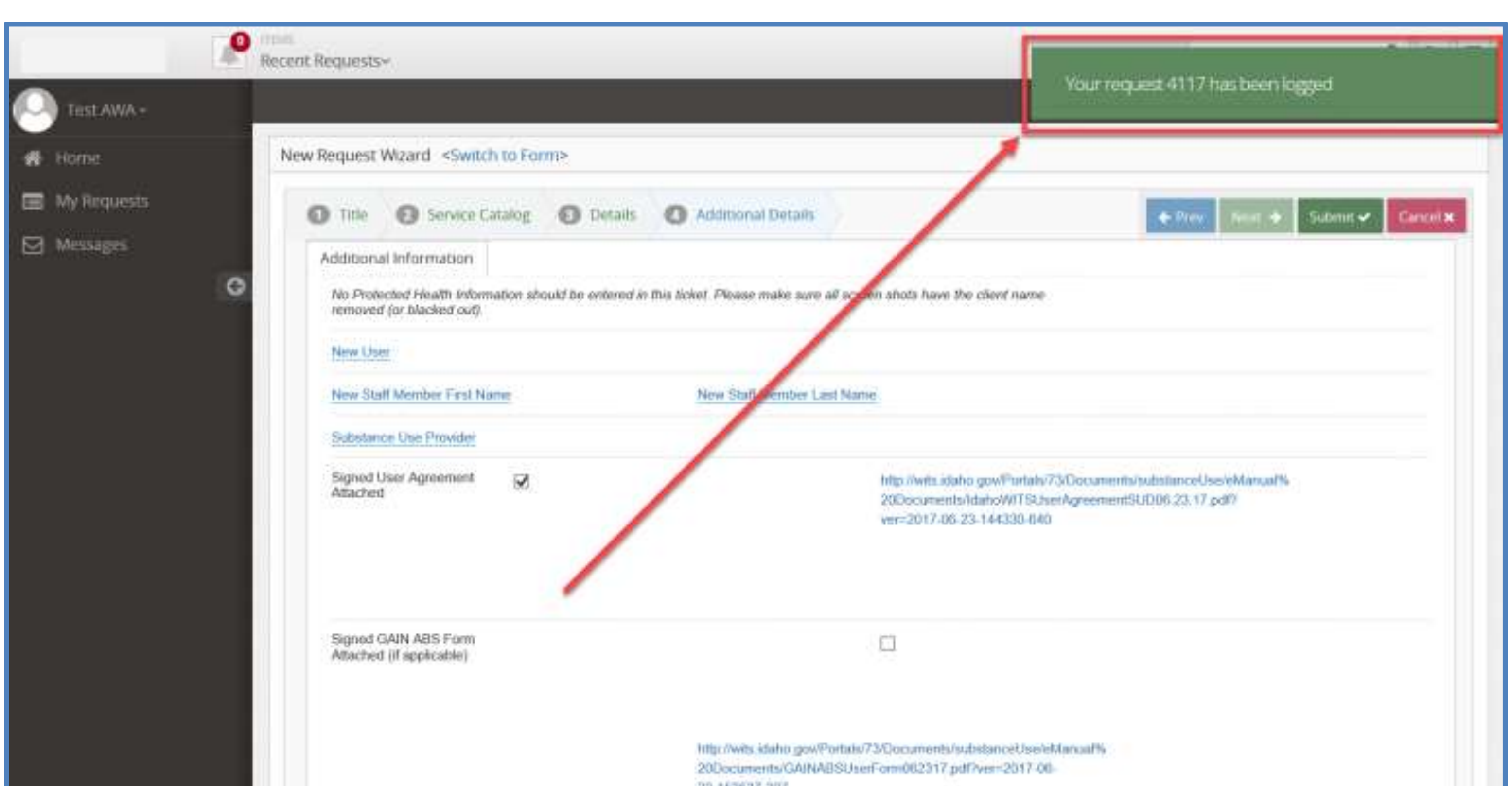
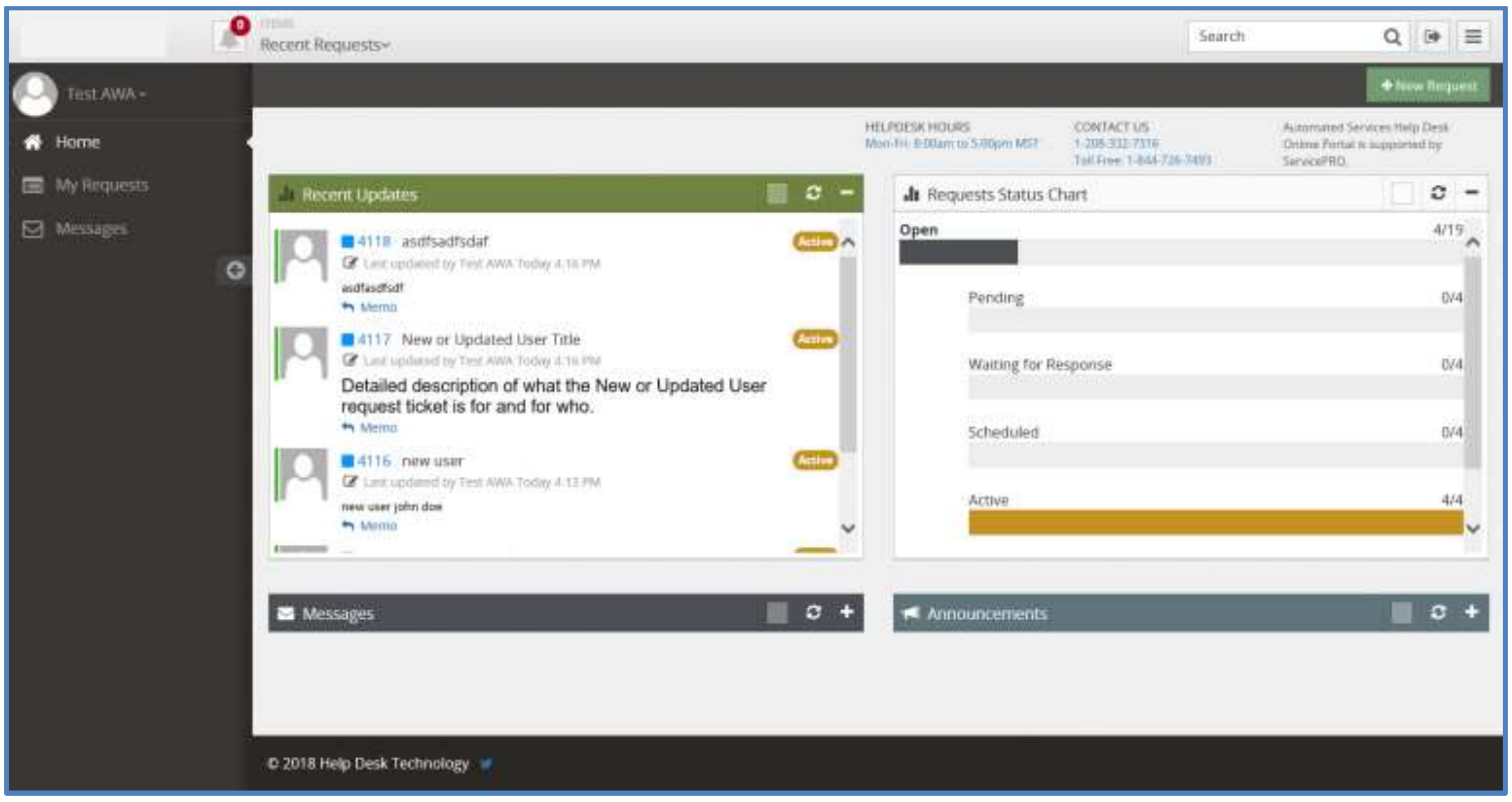


4. A confirmation message will appear in green with the Service Request Number.

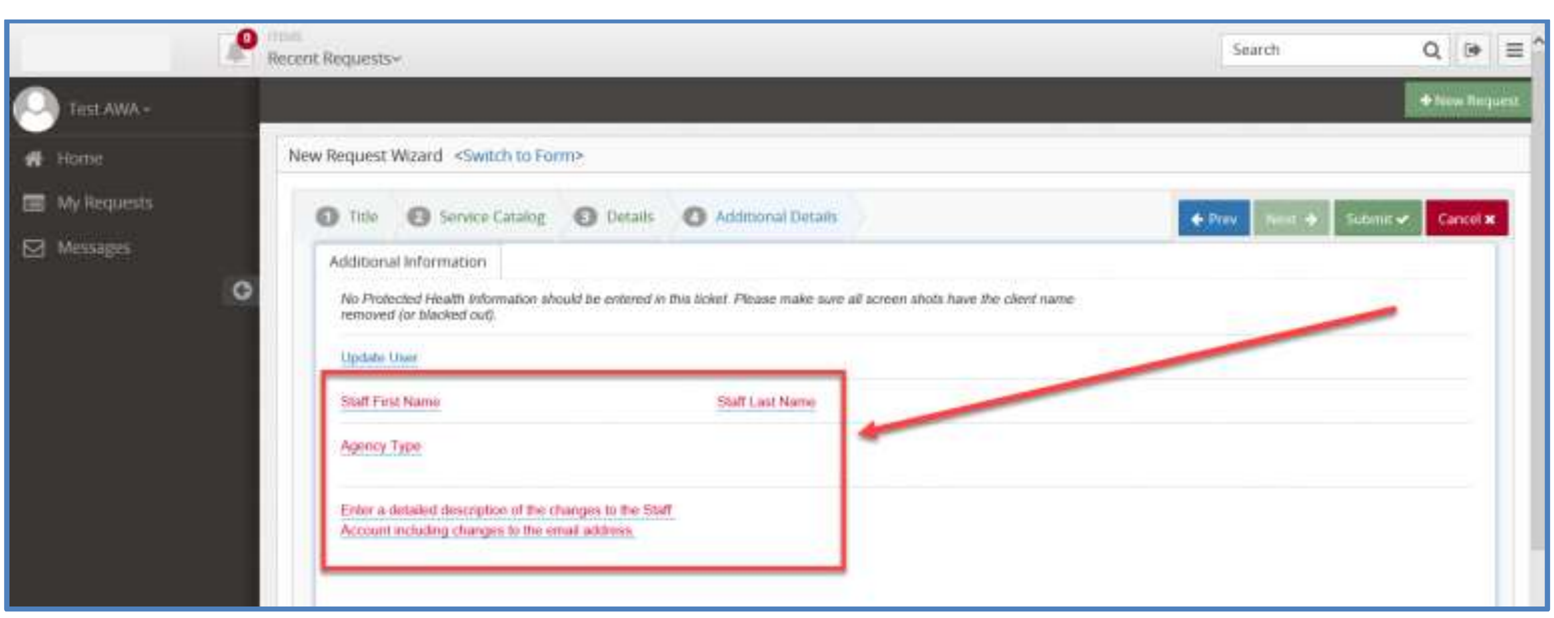


5. You are automatically navigated back to the Home Page.

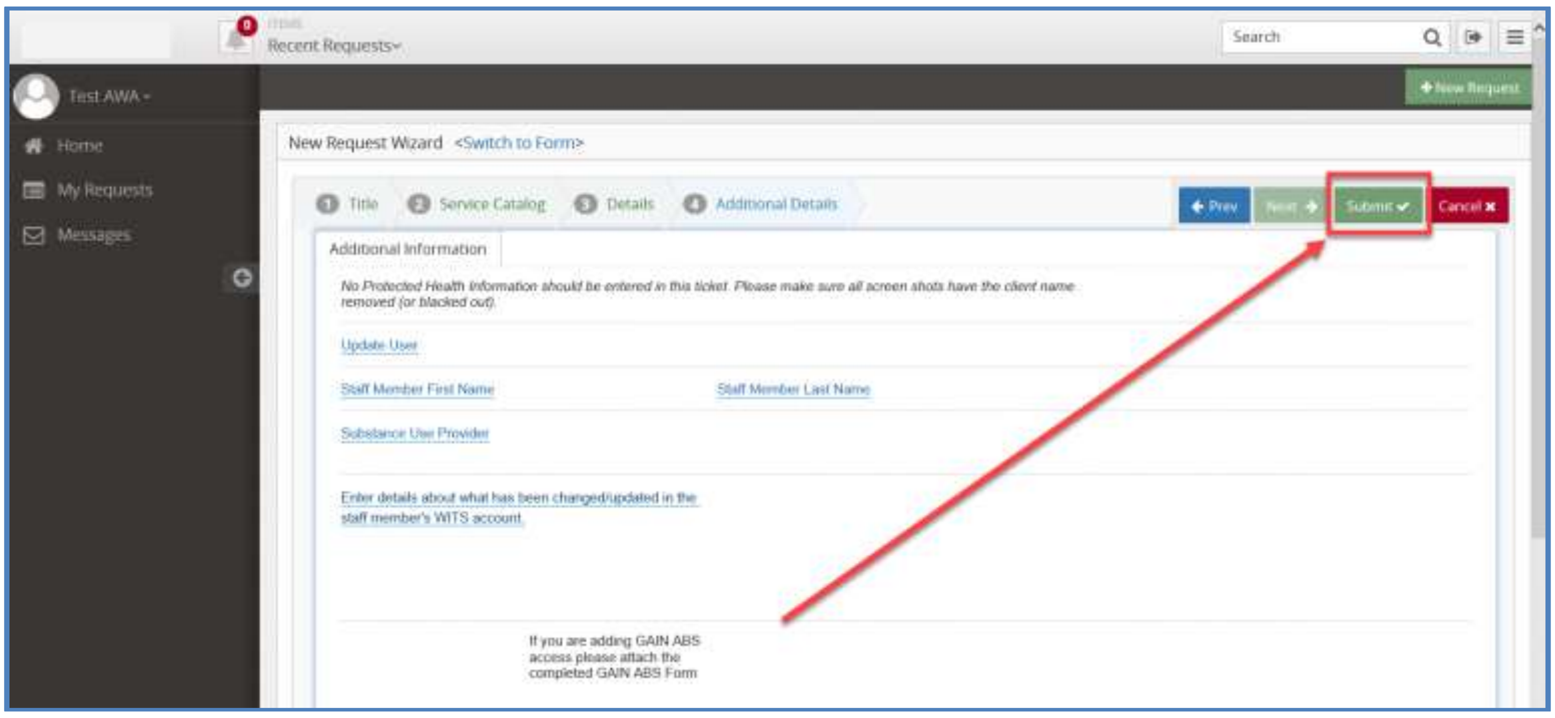
Action as Update User

STANDARDS: **A New User or Updated User Online Portal request should be submitted when updating of staff member account (email changing, credential changes, permission changes, adding a staff member as an AWA, etc.).**

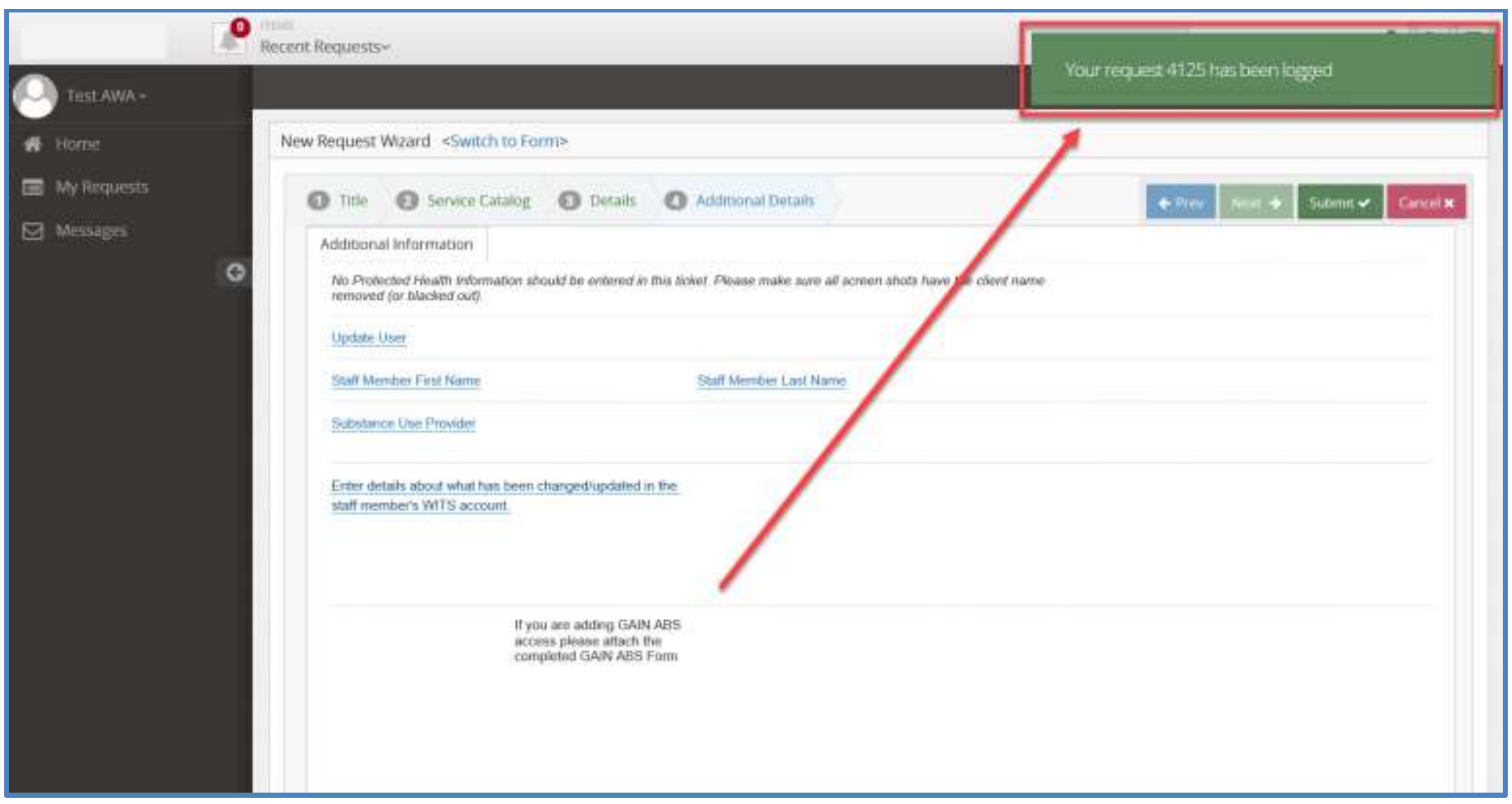
1. Click Action and select **Update User.**



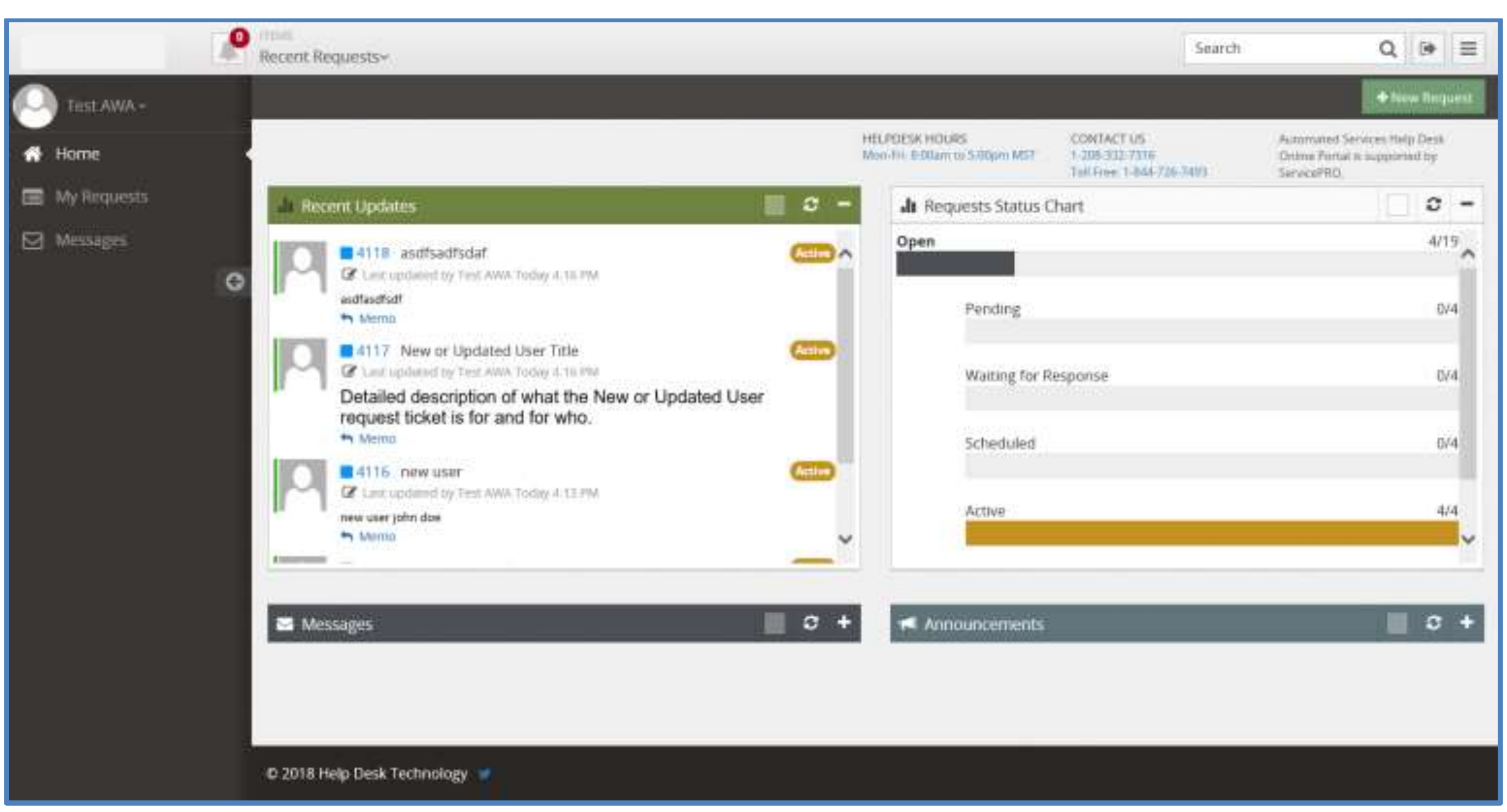
2. Complete the following fields.
   - Staff First Name – enter first name of staff member whose WITS account has been updated.
   - Staff Last Name – enter last name of staff member whose WITS account has been updated.
   - Agency Type – select Substance Use Provider.
   - Enter a detailed description of the changes to the Staff Account – enter details about what has been changed/updated in the staff member's WITS account.



3. Click Submit ✔.



4. A confirmation message will appear in green with the Service Request Number.



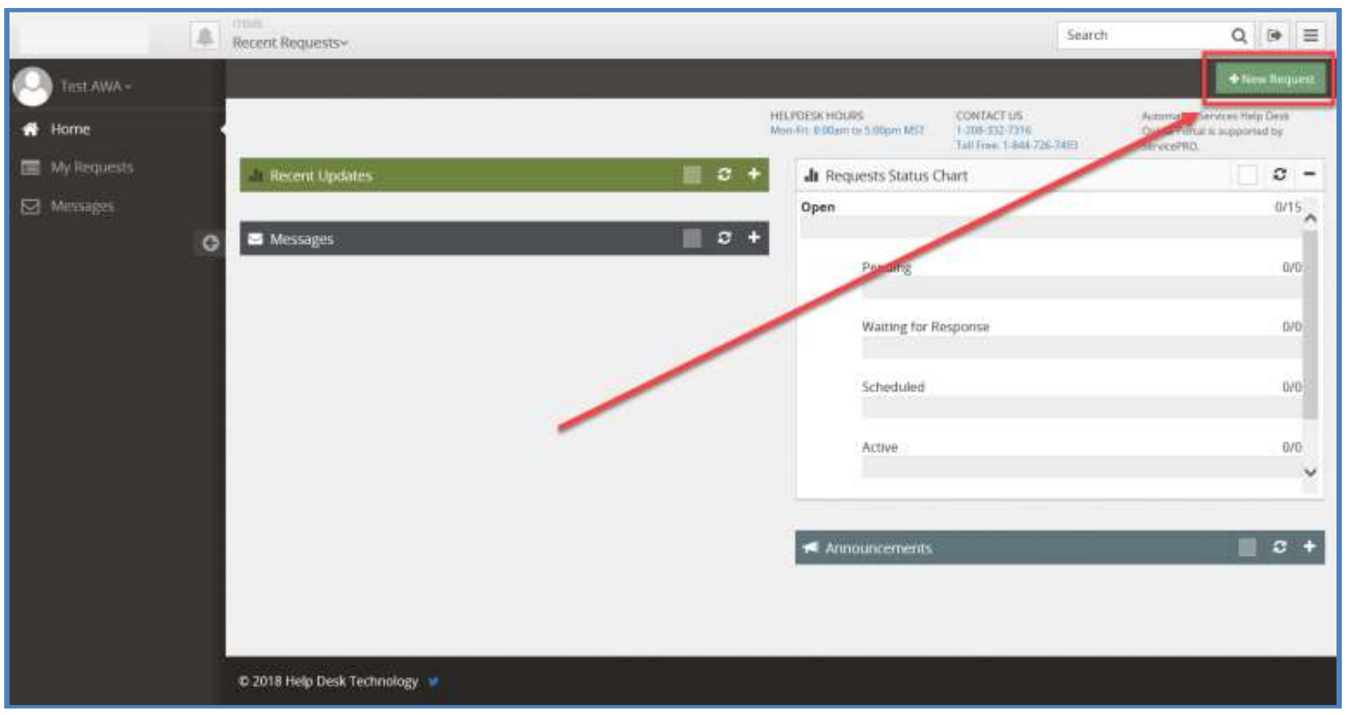
5. You are automatically navigated back to the Home Page.

User Revocation Online Portal Request

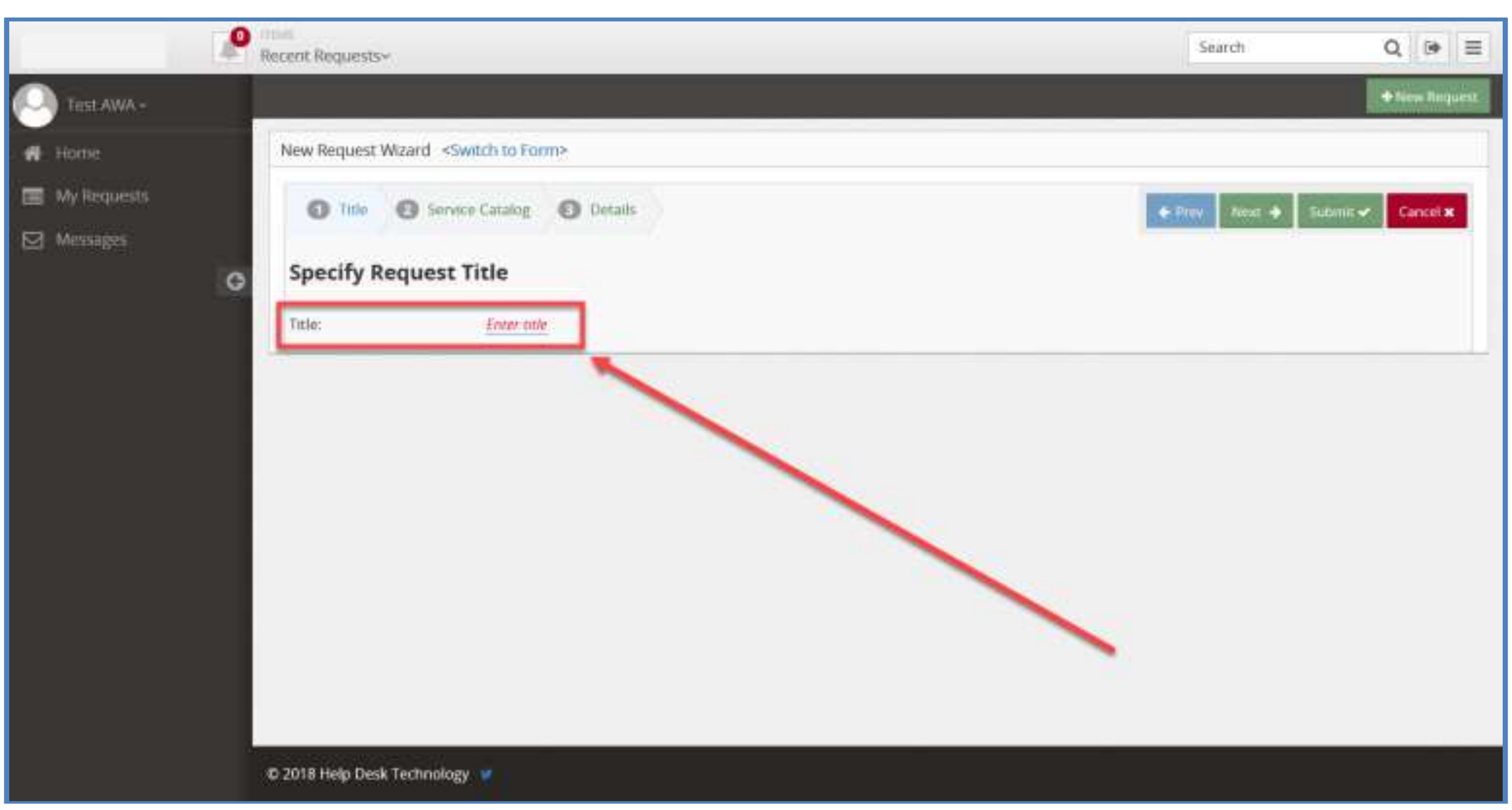
STANDARDS: **WITS access should be Locked and revoked within <u>24 hours</u> of a staff member leaving the agency's employment or no longer requiring WITS access to perform their job.**

STANDARDS: **User Revocation requests can only be created by Agency WITS Administrators (AWAs). User Revocation requests are created to document the revocation of a staff member WITS user account and attach the completed and signed <u>Idaho WITS Revocation Form</u> within five (5) business days of revoking a the WITS staff member account.**

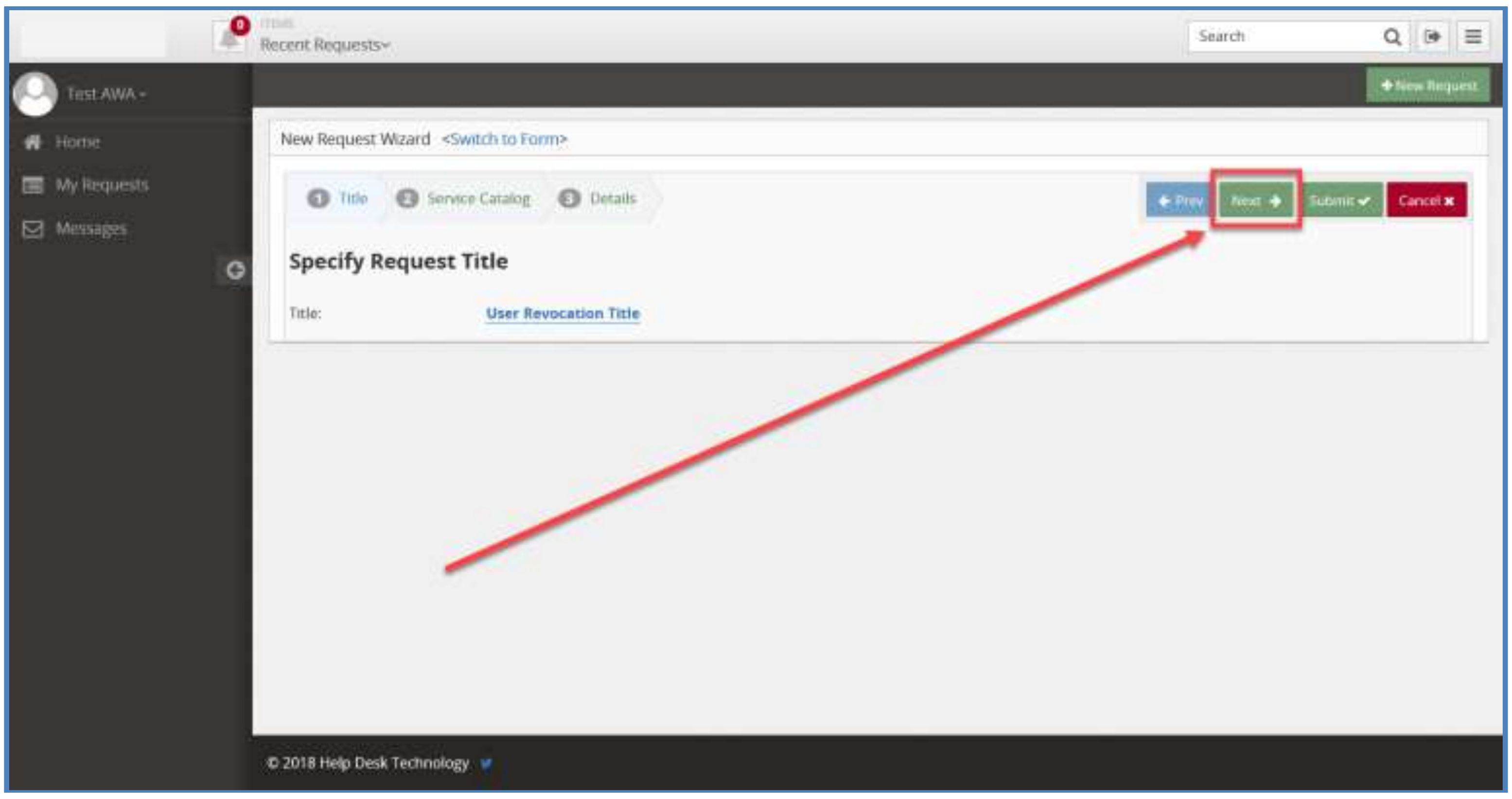
1. Log into the Online Portal. Click here for instructions to access the Online Portal.



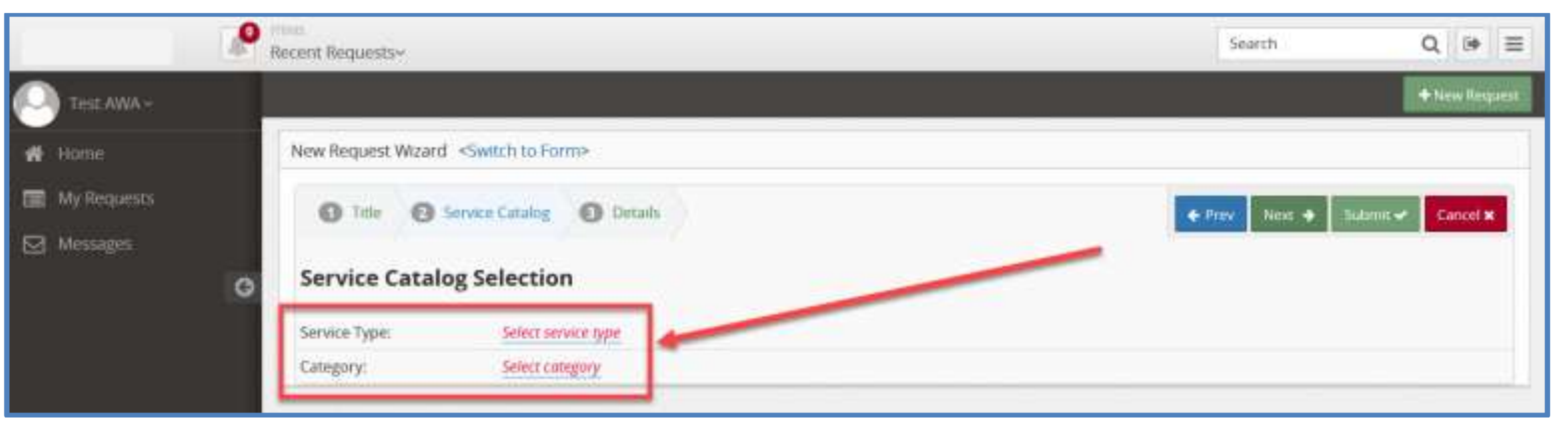
2. Click + New Request .



3. Click Enter title and enter the purpose of your request.

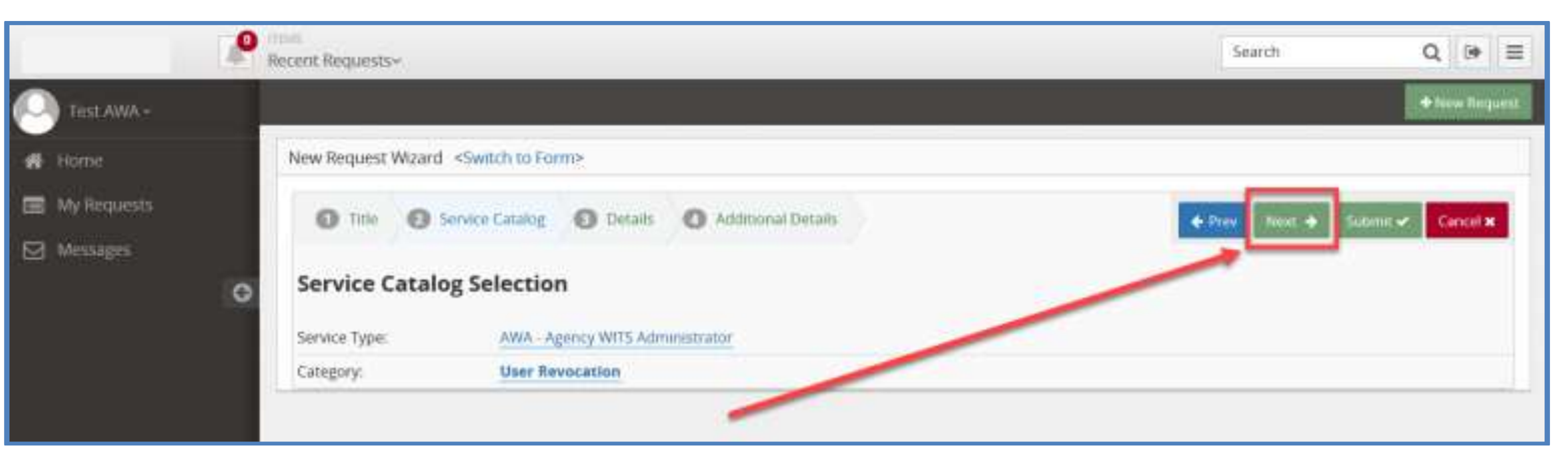
BHCCC eManual page


4. Click Next .

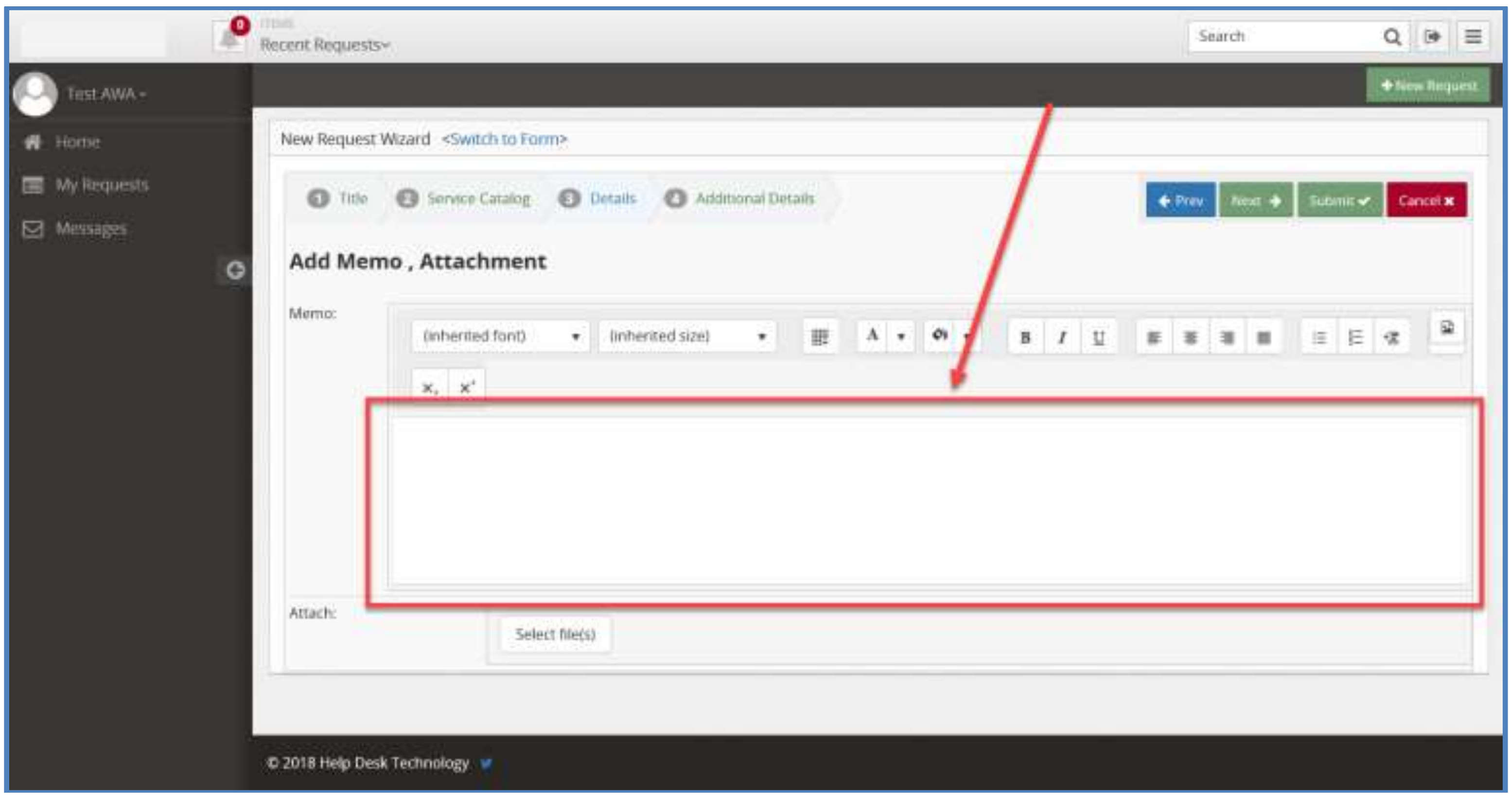


5. Click *Select service type* and select **AWA - Agency WITS Administrator**.

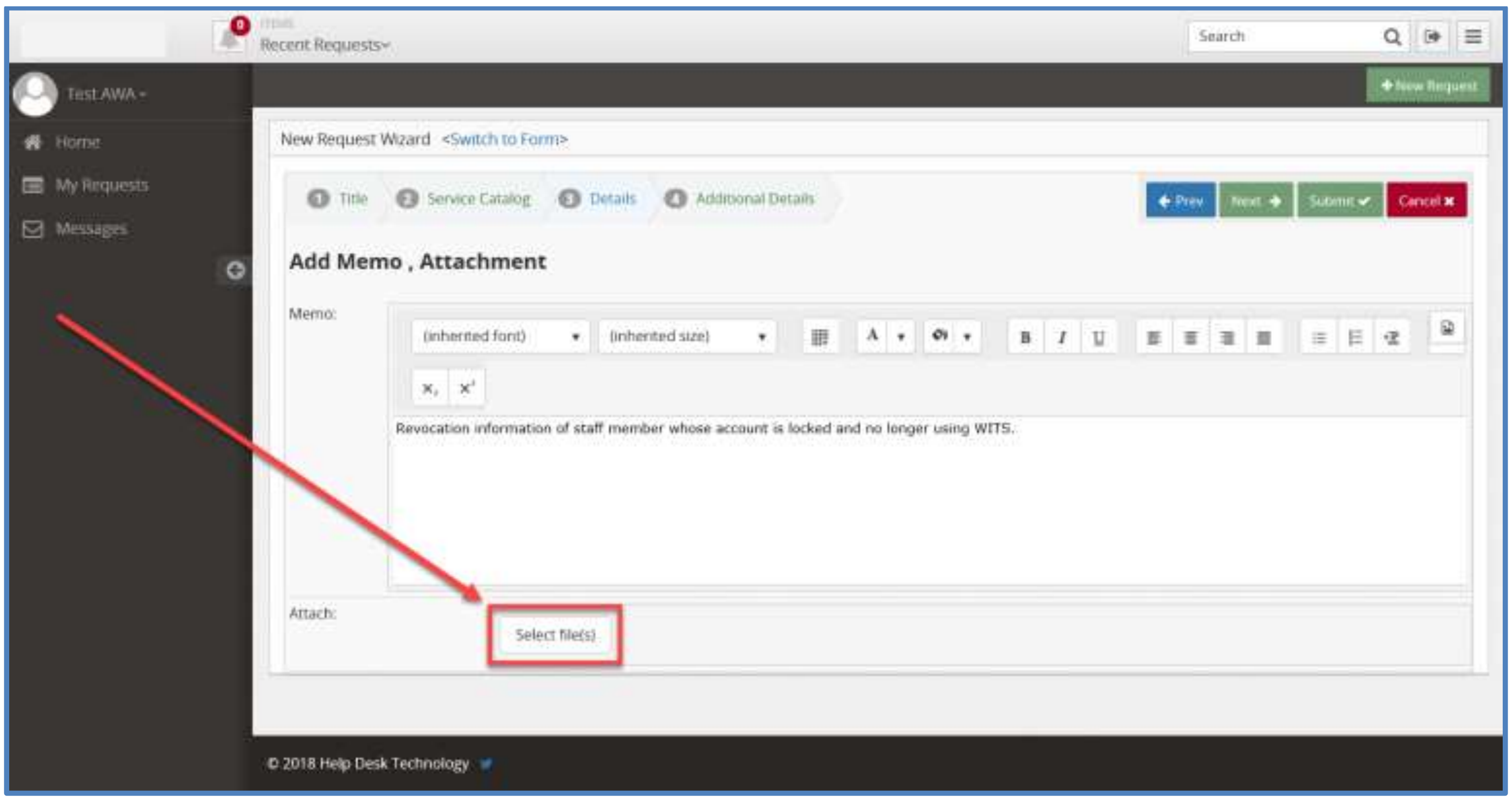
6. Click *Select category* and select **User Revocation**.



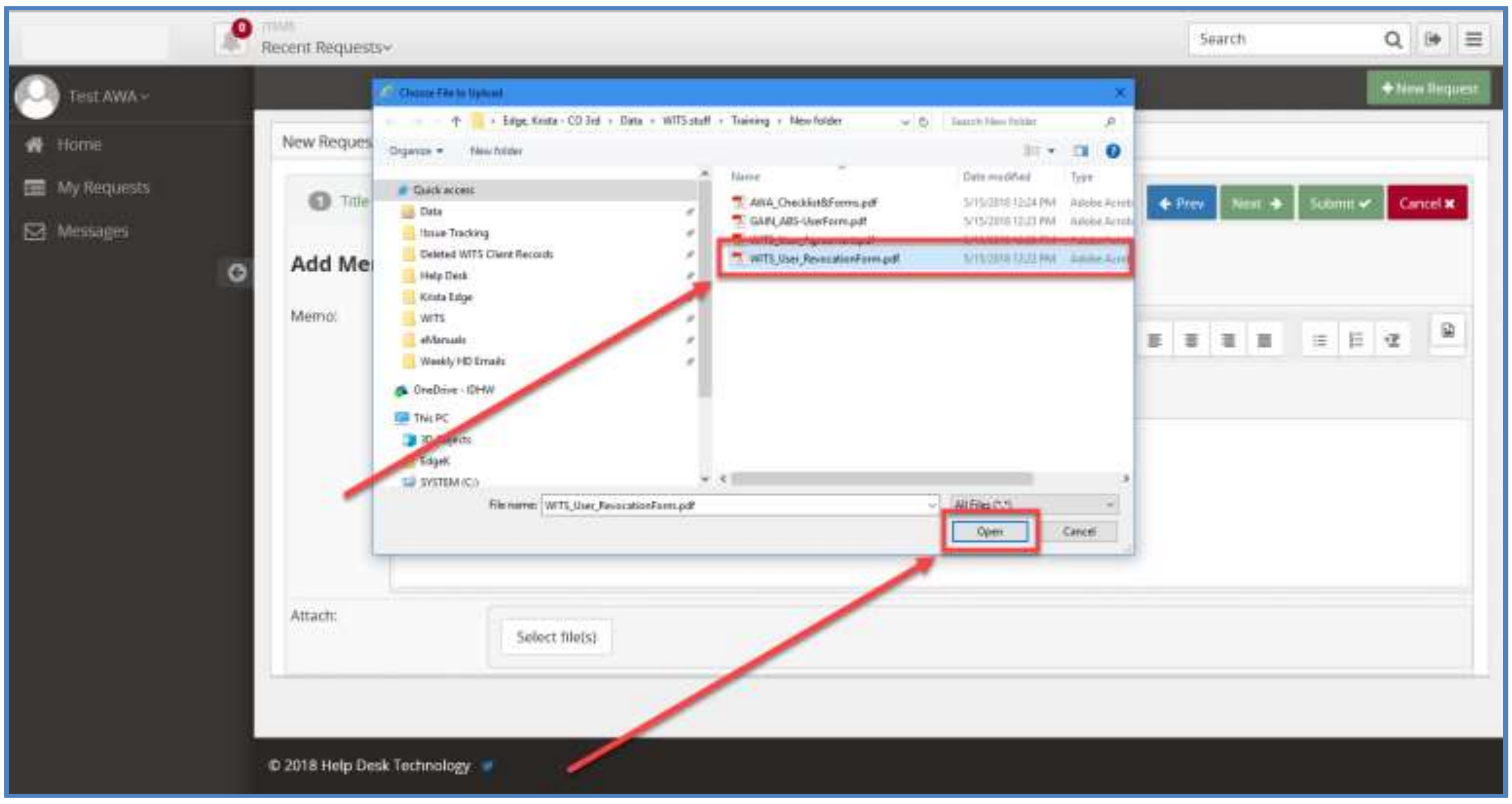
7. Click Next .



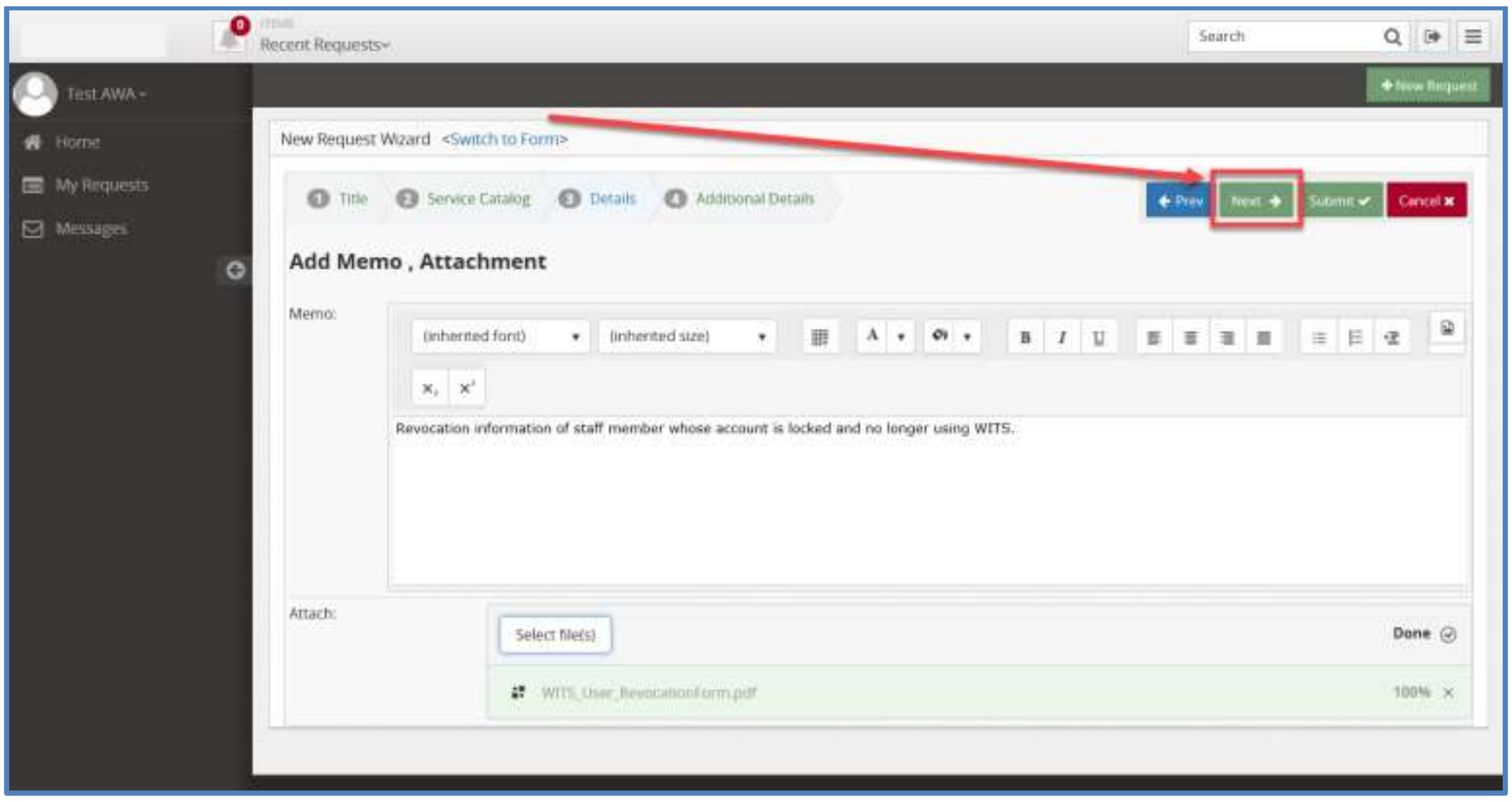
8. Enter a detailed description in the Memo field for this request.



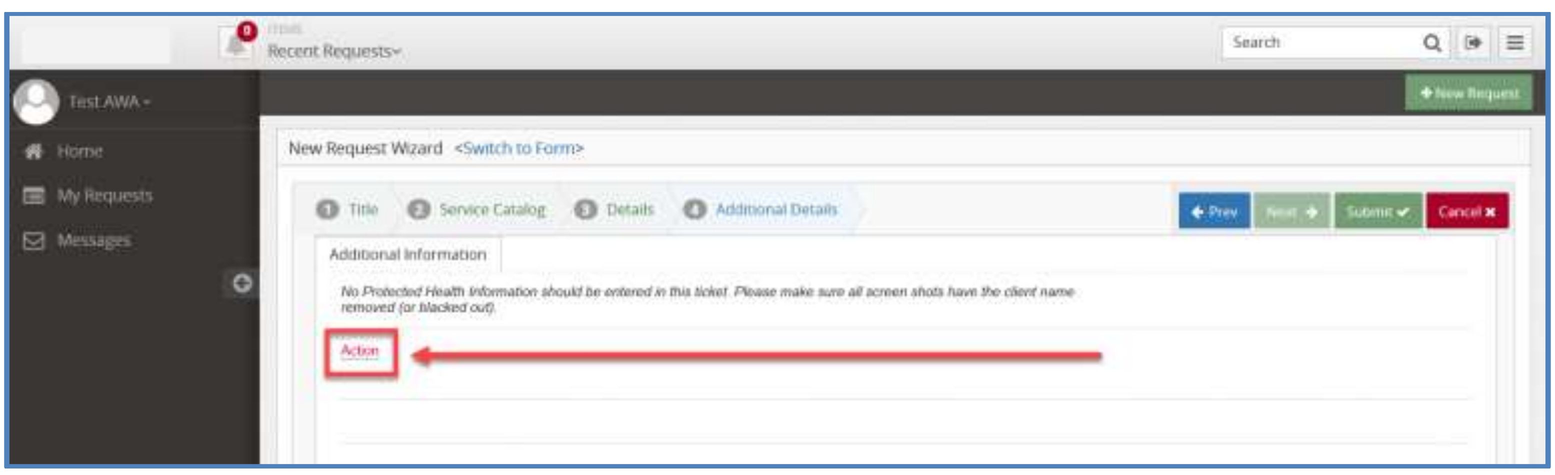
9. Click to attach the WITS User Revocation form.



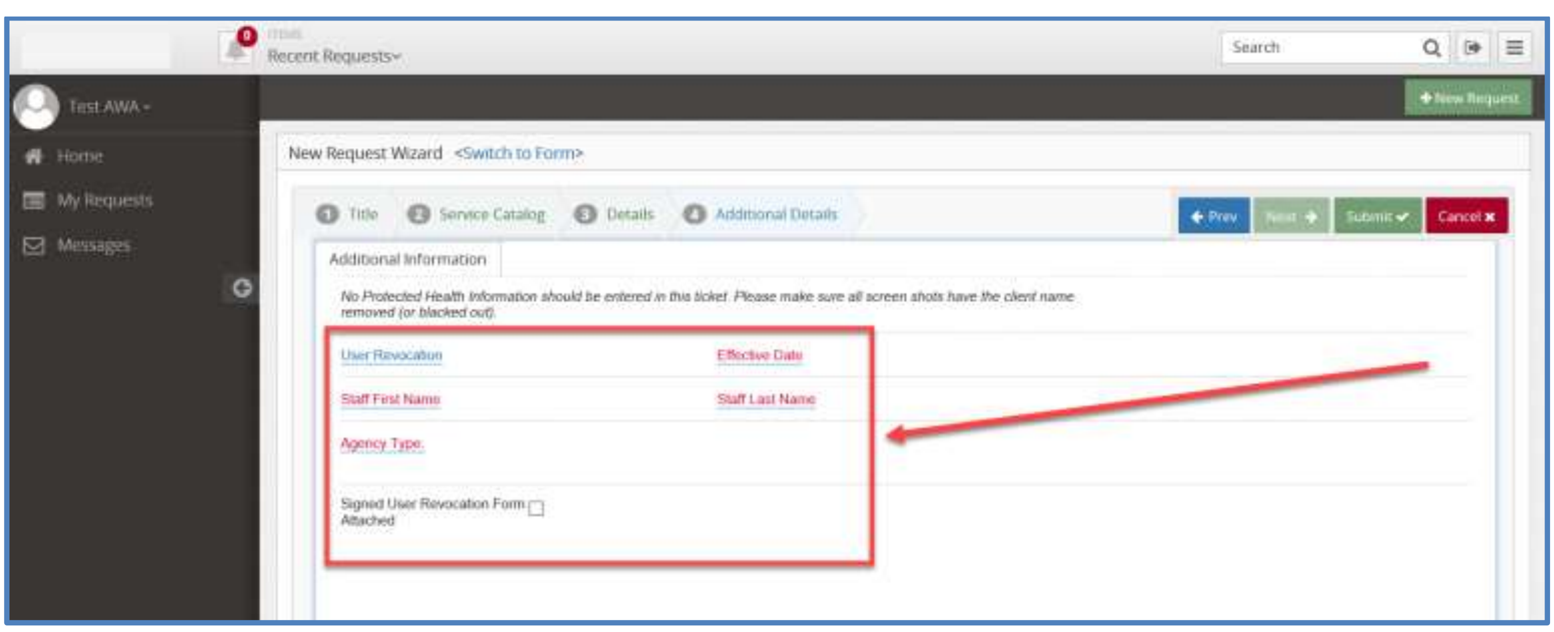
10. Navigate to the file and click Open.



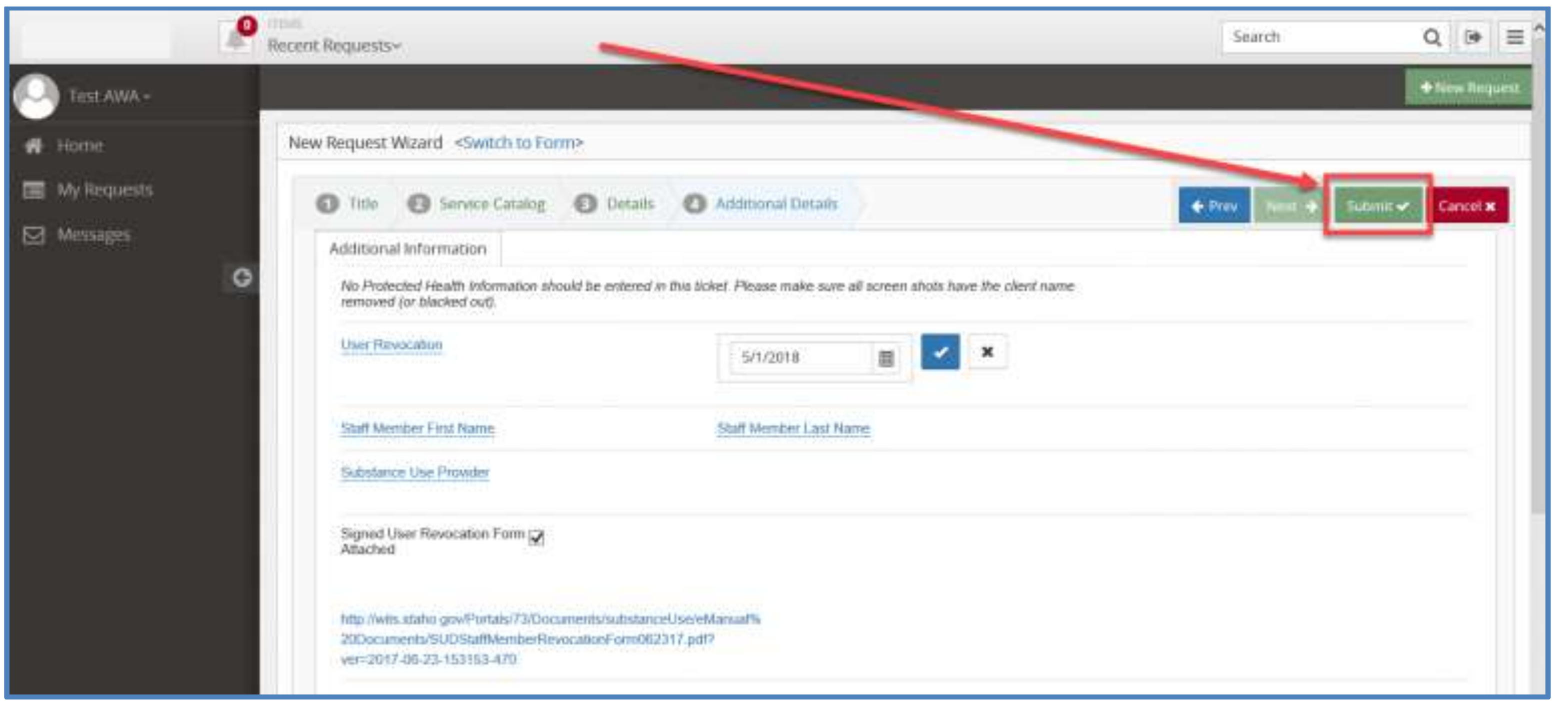
11. Click Next.



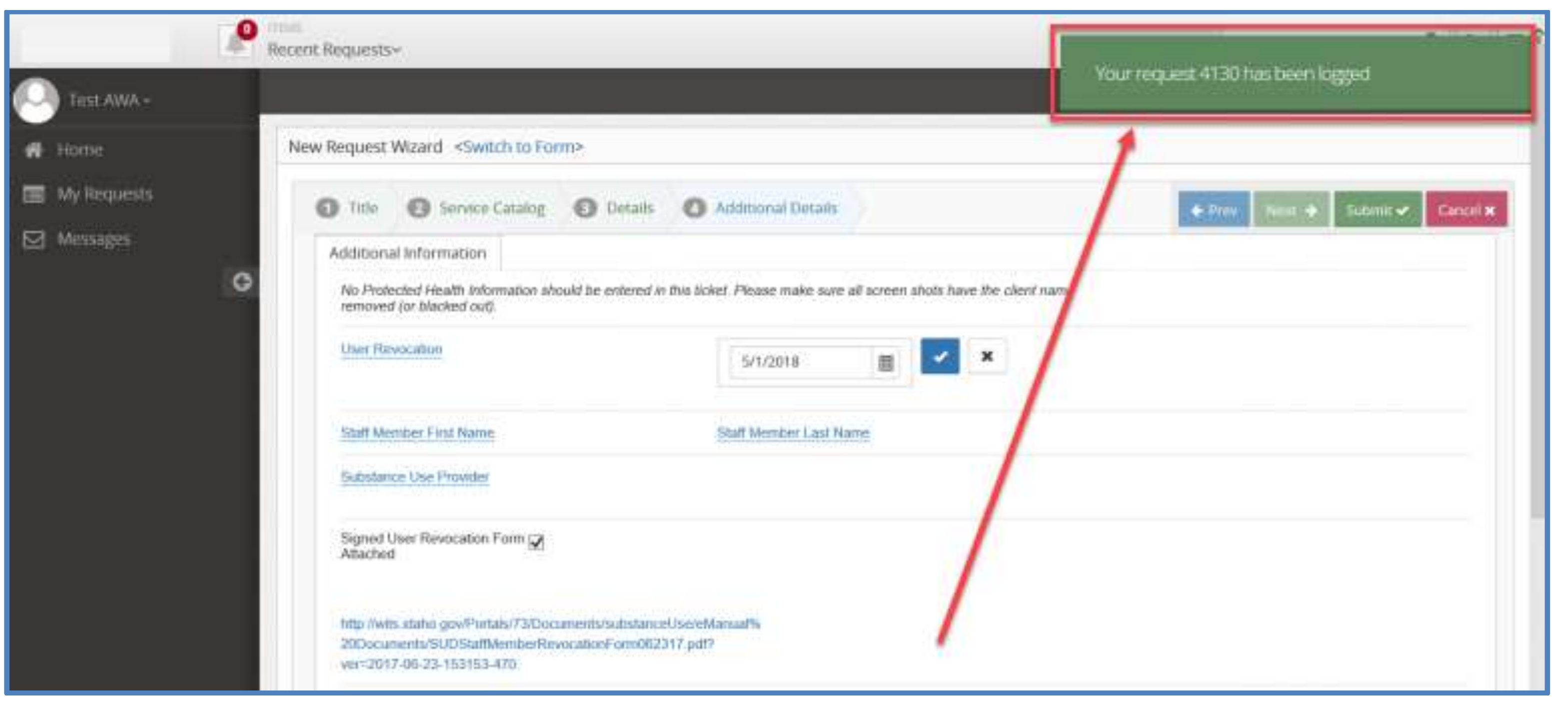
12. Click Action and select **User Revocation**.



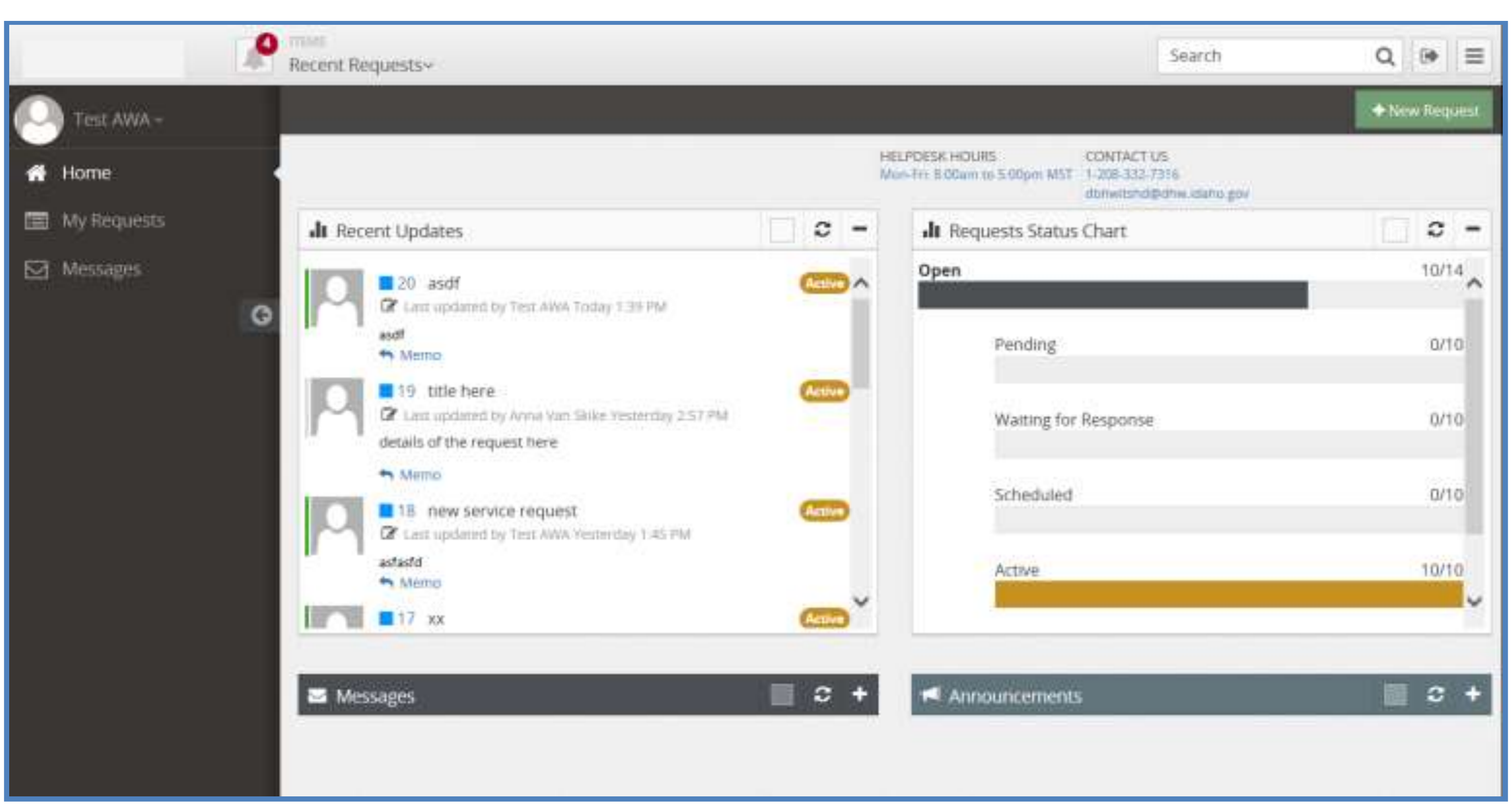
13. Complete the following fields.
    - Effective Date – enter date the staff member is no longer using WITS for your agency.
    - Staff First Name – enter first name of the staff member whose WITS user account is no longer in use.
    - Staff Last Name – enter last name of the staff member whose WITS user account is no longer in use.
    - Agency Type – select Substance Use Provider.
    - Signed User Revocation Form Attached – check box to alert the Help Desk the WITS Revocation form for the staff member has been attached on the request.



14. Click Submit ✔.



15. A confirmation message will appear in green with the Service Request Number.



16. You are automatically navigated back to the Home Page.

17. Help Desk staff will process the Online Portal Request according to the SLAs.

Behavioral Health Community Crisis Center
<u>IDAHO WITS USER AGREEMENT</u>

I, ______________________ *(user name)*, employed by ______ ___________________ *(agency name)*, understand that all information on the Idaho WITS database is confidential and I agree not to disclose any information regarding persons who have applied for, have received or who are receiving substance use disorders services to any unauthorized persons.

I understand that I may only use the information in the performance of activities of the Idaho WITS system for which I have been authorized. I understand that use or disclosure of any information concerning a recipient of assistance or service for any purpose other than the activities of Idaho WITS is prohibited except on written consent of the recipient.

I understand that I may only use the Idaho WITS site for those specific functions for which I am authorized. I understand that I will only be given access to information for which I have a legitimate need to know to complete my job functions.

I understand that my Idaho WITS Password and PIN are confidential and must be protected from unauthorized access. They are to be used only by me and I am prohibited from sharing my individual security information. Therefore, I agree to (a) limit unauthorized physical access to computer systems, displays, networks and health-care records; (b) position monitors and keyboards so they are not easily seen by anyone other than myself; (c) where appropriate, program workstations to display password-protected screen savers if left idle for a specified period of time.

I understand that Help Desk service for Idaho WITS will be provided through the Idaho Department of Health and Welfare as a free service for users. I acknowledge and accept that Help Desk service is provided without representation or warranty of any kind, and as such no liability will be taken for advice and assistance given to me where I or my representatives deem that advice to be inappropriate or incorrect. I am welcome to use the Idaho Automation Help Desk to help resolve WITS issues; however the Department and Automation Help Desk accepts no responsibility for any loss that may be suffered by any user who relies totally or partially on information imparted by the Idaho Automation Help Desk to make the service workable in the providers' environment. The Department and Automation Help Desk will not be liable to you or any other persons or entity with respect to any liability, loss or damage caused or alleged to be caused either directly or indirectly by WITS or the Automation Help Desk. The Department reserves the right to protect our Help Desk staff from any form of abuse by withdrawing the Help Desk service from the customer at any time deemed fit by Department management.

By signing below, I am indicating that I have read this entire nondisclosure agreement and agree to abide by it. I also understand that any violation of this agreement may result in the revocation of my access to Idaho WITS. Furthermore, I understand that criminal prosecution may be undertaken if I knowingly and intentionally disclose the information to anyone who is unauthorized, or use the data for fraudulent purposes.

____
Print Name

____ ___________________
Signature Date

Requests for new or updated User Accounts must be submitted by a designated AWA. AWAs are required to create and submit an Online Portal Request within five (5) business days of creating/editing/revoking a WITS user account.

Behavioral Health Community Crisis Center
WITS Agency WITS Administrator (AWA)
User Information Form

The agency will designate two staff members to serve as Agency WITS Administrators (AWAs). Complete one form for each person.

If you need assistance contact the Automation Help Desk at dbhwitshd@dhw.idaho.gov or call (208) 332-7316 or toll-free-844-726-7493.

Date: ______________ Agency Name: ____

Physical Address: ____

City: ________________________ State: ____________ Zip: ________________

Mountain Time Zone ☐ Pacific Time Zone ☐

First Name: ______________________________ Last Name: ___________________________

Email Address:_____________________________________ Work Phone Number: ___________

Job Title: ____________________________ Professional Credentials: _______________________

Supervisor: ____

My signature below serves as a record that I have reviewed this request and approve of the requested WITS security access for this individual.

____ ______________________

Supervisor's Signature Date

Note: A designated AWA is required to attend an Idaho WITS Crisis Center AWA training prior to the assignment of the AWA permissions to the staff account in WITS.

Requests for new or updated User Accounts must be submitted by a designated AWA. AWAs are required to create and submit an Online Portal Request within five (5) business days of reating/editing/revoking a WITS user account.

Behavioral Health Community Crisis Center
WITS Staff Member Revocation Form

WITS access must be revoked <u>within 24 hours</u> of a staff member leaving the BHCCC's employment or no longer requiring WITS access to perform their job. BHCCC's will complete and submit the BHCCC WITS Staff Member Account Revocation Form per the protocol.

If you need assistance contact the Automation Help Desk at dbhwitshd@dhw.idaho.gov or call (208) 332-7316 or toll-free-844-726-7493.

Date: ______________________

Agency Name: ____

User's First Name: ___________________ Last Name: ______________________

User's Email Address: _____________________________

The signature below serves as a record that I have reviewed this request and approve revocation of this user's WITS access.

____ __________________
Agency WITS Administrator Signature or Other Appropriate Staff Date

Agencies must submit the completed form via the Online Portal.

IDAHO DEPARTMENT OF
HEALTH & WELFARE

BRAD LITTLE – Governor
DAVE JEPPESEN – Director

ROSS EDMUNDS – Administrator
DIVISION OF BEHAVIORAL HEALTH
450 West State Street, 3rd Floor
P.O. Box 83720
Boise, Idaho 83720-0036
PHONE 208-334-6997

Behavioral Health Community Crisis Center
WITS Agency Set-Up Packet

Table of Contents

Policies and Procedures for Behavioral Health Community Crisis Centers (BHCCC) Accessing Idaho WITS Production Sites

Purpose:
To establish guidelines and methods for WITS users to access the WITS Production Sites within the permission parameters for which they have been authorized.

Policy:
Processes of entering, sharing, and identifying descriptive and/or diagnostic data regarding individuals whose personal information has been entered into WITS must meet confidentiality requirements of both HIPAA Law and 42 CFR. Only those persons meeting requirements, as determined by his/her prescribed role(s) and qualifications, may be granted specific permissions to access WITS.

Procedure:
The Idaho Department of Health and Welfare, Division of Behavioral Health (DBH) Automation Help Desk will send each BHCCC a packet containing information, instructions, and forms. Each BHCCC will identify those staff members who, by virtue of his/her role within the respective BHCCC, will be recommended to have access to WITS Productions sites. Each BHCCC will complete and submit all forms to the Automation Help Desk per the instructions.

The Automation Help Desk will review the submitted documentation for completeness, and ensure the permissions requested are appropriate to the role(s) and qualifications of the staff member. The Automation Help Desk will place incomplete paperwork on hold and notify the BHCCC of any corrective action required to complete the request. The Automation Help Desk will create the BHCCC Agency and Agency WITS Administrator accounts in WITS, allowing authorized users to access Production sites.

The BHCCC will designate two staff members to serve as Agency WITS Administrators (AWAs). AWAs are responsible for the management of access to WITS according to DBH policy, and for granting and removing access privileges to/from staff members in their agency. It is required that any designated AWA must attend an Idaho WITS AWA training prior to the assignment of the AWA permissions to the staff account in WITS.

WITS access must be revoked within 24 (business) hours of a staff member leaving the BHCCC's employment or no longer requiring WITS access to perform their job. Agencies will use the Online Portal to notify the Automation Help Desk of staff revocations according to AWA Processes. This will allow the Automation Help Desk to better support BHCCC efforts and, in the case of some revocations, ensure compliance with confidentiality requirements of HIPAA Law and 42 CFR.

IDAHO DEPARTMENT OF HEALTH AND WELFARE
DIVISION OF BEHAVIORAL HEALTH
IDAHO WEB INFRASTRUCTURE FOR TREATMENT SERVICES (WITS)
BEHAVIORAL HEALTH COMMUNITY CRISIS CENTER (BHCCC)
AGENCY AGREEMENT

1. Purpose. This Agreement is entered into by and between the State of Idaho, Department of Health and Welfare, Division of Behavioral Health (hereinafter “DBH”) and ____________________________________ (hereinafter “Provider”).

Whereas, DBH owns and operates an Electronic Health Record (EHR) system, Web Infrastructure for Treatment Services (WITS), that is available for use by various entities, including substance use disorder treatment and recovery support services providers.

Whereas, DBH has chosen WITS as the statewide data collection and management system, as well as the EHR system for a contracted Behavioral Health Community Crisis Center (BHCCCC) in Idaho.

Whereas, Provider is an agency that is contacted with DBH to provide a BHCCC and utilizes the electronic health record provided by DBH through WITS.

Whereas, in connection with those services, Provider information entered into WITS by the Provider may include client information that is subject to protection under federal laws governing the confidentiality of alcohol and drug abuse client records and/or protected health information.

Whereas, DBH must have in place Administrative Safeguards, Technical Safeguards, and Physical Safeguards to protect the privacy and confidentiality of information stored in WITS.

Whereas, the parties agree to comply with safeguards and applicable requirements for the confidentiality of alcohol and drug abuse client records and/or protected health information.

NOW, THEREFORE, the parties agree as follows with respect to WITS operations:

2. Definitions

2.1 “Agency WITS Administrator”. Individual(s) from Provider Agency who has the responsibility to oversee WITS for the agency and is the agency contact for DBH. The Agency WITS Administrator manages access to WITS according to DBH policy and has responsibility for granting and removing access privileges to/from users in the agency with assistance from DBH as needed.

2.2 “Confidentiality”. A condition in which information is shared or released in a controlled manner.

2.3 “Electronic Health Record”. Protected digital health record housed in a secure digital space (web-hosted) accessible only by authorized persons.

2.4 “Electronic Health Information”. A computerized format of health-care information that is used for the same purposes as paper records, namely to familiarize readers with the client’s status, to document care, to determine reimbursement rates, to justify reimbursement claims and to measure outcomes of the care process.

2.5 “Idaho Web Infrastructure Treatment Services”. WITS is an open-source, web-based clinical and administrative system for use by substance use disorder treatment and recovery support services providers.

2.7 “Privacy”. An individual’s desire to limit the disclosure of personal information.

2.8 “Security”. Measures to protect the confidentiality, integrity and availability of information and the information systems used to access it.

3. General

3.1 All information and data from the Provider is owned by the Provider. DBH has ownership of WITS data and information obtained through conducting normal business practices.

3.2 Provider shall utilize WITS to capture all client data.

3.3 DBH acknowledges that in receiving, storing, processing or otherwise dealing with any information received from the Provider identifying or otherwise relating to the clients receiving services from the provider, it is fully bound by the provisions of the federal regulations governing Confidentiality of Alcohol and Drug Abuse Patient Records, 42 CFR Part 2 (42 CFR) and/or the Health Insurance Portability and Accountability Act (HIPAA), to the extent such regulations respectively apply to such Provider information (“Protected Client Information” or “PCI”); and DBH may not use or disclose PCI except as permitted or required by this Agreement or by law.

3.4 Provider acknowledges that it is fully bound by the provisions of 42 CFR and/or HIPAA, to the extent such regulations respectively apply to such Provider PCI; and Provider will not use or disclose such PCI via WITS except as permitted or required by law; nor will Provider request or require DBH to use or disclose such PCI except as permitted by law.

3.5 Provider acknowledges and accepts that the Automation Help Desk services are not sold but are provided as a free service for the convenience of the provider, without representation or warranty of any kind, and as such no liability will be taken for advice and assistance given to the provider where the provider or representatives deem that advice to be inappropriate or incorrect. DBH and the Automation Help Desk accept no responsibility for any loss that may be suffered by any provider who relies totally or partially on information imparted by the Automation Help Desk to make the service workable in the providers’ environment.

DBH and the Automation Help Desk will not be liable to the provider or any other persons or entity with respect to any liability, loss or damage caused or alleged to be caused either directly or indirectly by WITS or the Automation Help Desk. DBH reserves the right to protect Help Desk staff from any form of abuse by withdrawing the Help Desk service from the customer at any time deemed fit by DBH.

3.6 Authorization from the DBH is required to access the WITS system.

3.7 The nature and extent of authorized access to WITS shall be determined by (a) legitimate need to fulfill job responsibilities; (b) local/state/federal/funding requirements; (c) confidentiality requirements; and (d) security requirements. Individuals with access to WITS are responsible for all actions and transactions occurring during their use of WITS.

3.8 This Agreement shall be governed and construed in accordance with DBH policy and the laws of the State of Idaho.

4. DHW Responsibilities

4.1 DBH agrees to make available to a new Provider necessary training and other reasonable technical assistance, including Help Desk support, concerning the use of the WITS system.

4.2 DBH agrees to provide user guidance documents on the functionalities and processes for using WITS.

4.3 DBH shall establish policies, procedures and/or processes for Administrative, Technical and Physical Safeguards to protect the privacy and confidentiality of information stored in WITS.

4.5 DBH shall monitor audit trails to ensure that users are following DBH policies and procedures and adhering to privacy and confidentiality standards.

5. Provider Responsibilities

5.1 Provider agrees to designate two staff (one primary and one back up) to serve as the Agency WITS Administrator unless otherwise specified by DBH.

5.2 Provider agrees to adhere to policies, procedures and/or processes established by DBH as Administrative, Technical, and Physical Safeguards to protect the privacy and confidentiality of information stored in WITS.

5.3 Provider shall be responsible for oversight of individual users granted access through or on behalf of the Provider.

5.4 Provider shall be responsible for keeping their data comprehensive and updated. For information that cannot be included in the electronic record, a paper record will be maintained as an adjunct to the electronic record. All documents generated by the provider that require signatures shall include the appropriate original or electronic signatures.

5.5 Provider shall be responsible for the establishment, costs, maintenance and support needed for internet services and other hardware or software needed to use WITS for their agency.

6. Effective Date and Term of the Agency Agreement

6.1 This Agreement is effective when it is signed by all parties, or at a later date as specified in an amendment.

6.2 The Provider shall not have access to WITS until the Agreement is effective.

6.3 This Agreement shall automatically continue from year to year thereafter unless terminated by either party as provided in this Agreement.

7. Termination

7.1 This agreement may be terminated by either party without cause by giving thirty (30) days' notice in writing to the other party.

7.2 This agreement shall be terminated immediately upon the revocation, non-renewal, or other termination with the DBH. Following a termination of this agreement, the provider may:

a) Retain read-only access to client records in WITS; or
b) Request DBH to provide data for migration into another system selected by Provider for archiving. Any costs associated with data migration will be the sole responsibility of the Provider.

7.3 DBH reserves the right to revoke access to WITS at any time for failure on the part of the Provider to comply fully with any and all guidelines governing the use of WITS.

The undersigned have read and understand this Crisis Center Agency Agreement, and agree to be bound by its terms.

Idaho Department of Health and Welfare, Division of Behavioral Health:

Print Name: Ross D. Edmunds	**Title:** Administrator, Division of Behavioral Health
Signature:	**Date Signed:**

Provider:

Agency Name:	
Print Name:	**Title:**
Signature:	**Date Signed:**

Behavioral Health Community Crisis Center
WITS Agency Set-Up Form

Complete **one** WITS Agency Set-Up Form for the BHCCC. If you need assistance contact the Automation Help Desk at dbhwitshd@dhw.idaho.gov or call (208) 332-7316 or toll-free-844-726-7493.

Agency Name: ____

EIN # (Federal Tax ID Number): ________________ NPI Number *(if available)*: ____________

Agency Physical Address: ______________________________________

Mailing Address (if different): ____________________________________

City: ______________________ State: _____________ Zip: _______________

County: __________________________ Phone Number: ____________________

Agency Contact Name: ___________________________ Email: _______________________

Automation Help Desk Support

By signing the WITS Agency Set Up form, the user acknowledges and accepts that the Automation Help Desk service is not sold but rather is provided as a free service for the convenience of our providers, without representation or warranty of any kind, and as such no liability will be taken for advice and assistance given to providers where providers or representatives deem that advice to be inappropriate or incorrect. Any provider is welcome to use the Automation Help Desk to help resolve WITS issues; however the Department and the Automation Help Desk accepts no responsibility for any loss that may be suffered by any provider who relies totally or partially on information imparted by the Automation Help Desk to make the service workable in the providers' environment. The Department and Automation Help Desk will not be liable to you or any other persons or entity with respect to any liability, loss or damage caused or alleged to be caused either directly or indirectly by WITS or the Automation Help Desk. The Department reserves the right to protect our Automation Help Desk staff from any form of abuse by withdrawing the Automation Help Desk service from the customer at any time deemed fit by Department management.

____ ______________

Agency Authorized Agent Date

Agencies will submit completed forms to the Automation Help Desk via the Online Portal.

Behavioral Health Community Crisis Center
WITS Facility Set-Up Form

Complete **one** WITS Facility Set-up Form **for each facility's physical location**

Agency and Facility Name: ______________________________

Facility Physical Address: ______________________________

Mailing Address (if different): ______________________________

City: ______________ State: ______________ Zip: ______________

County: ______________ Phone Number: ______________

Facility Contact Name: ______________ Email: ______________

Agencies will submit completed forms to the Automation Help Desk via the Online Portal.

Behavioral Health Community Crisis Center
WITS Agency WITS Administrator (AWA) User Information Form

The agency will designate two staff members to serve as Agency WITS Administrators (AWAs). Complete one form for each person.

If you need assistance contact the Automation Help Desk at dbhwitshd@dhw.idaho.gov or call (208) 332-7316 or toll-free-844-726-7493.

Date: ______________ Agency Name: ____

Physical Address: ____

City: ________________________ State: _____________ Zip: ________________

Mountain Time Zone ☐ Pacific Time Zone ☐

First Name: ______________________________ Last Name: ___________________________

Email Address:_____________________________________ Work Phone Number: ___________

Job Title: ____________________________ Professional Credentials: ______________________

Supervisor: ____

My signature below serves as a record that I have reviewed this request and approve of the requested WITS security access for this individual.

____ ______________________

Supervisor's Signature Date

Note: A designated AWA is required to attend an Idaho WITS Crisis Center AWA training prior to the assignment of the AWA permissions to the staff account in WITS.

New agencies must submit completed forms via the Online Portal.

Behavioral Health Community Crisis Center
WITS USER AGREEMENT

I, ______________________ *(user name)*, employed by _____________________________ *(agency name)*, understand that all information on the Idaho WITS database is confidential and I agree not to disclose any information regarding persons who have applied for, have received or who are receiving substance use disorders services to any unauthorized persons.

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By signing below, I am indicating that I have read this entire nondisclosure agreement and agree to abide by it. I also understand that any violation of this agreement may result in the revocation of my access to Idaho WITS. Furthermore, I understand that criminal prosecution may be undertaken if I knowingly and intentionally disclose the information to anyone who is unauthorized, or use the data for fraudulent purposes.

____

Print Name

________________________________ ____________________

Signature Date

Requests for new or updated User Accounts must be submitted by a designated AWA. AWAs are required to create and submit an Online Portal Request within five (5) business days of creating/editing/revoking a WITS user account.