

# HI-WITS Training: Add A New Client

## Lesson 1

**Situation:** In this training Clinical Staff will learn how to Create A New Client, Add Payor Group Enrollment, Add Pre-Treatment Program Enrollment, Add Authorization for Pre-Treatment, Create Encounters for Assessment (H0001/R1), Placement Determination (T1023/R0) and Screening (H0002/R0) and Release to Billing.

**Note:** All Clients should be “Adult” and All Payor Group Enrollment is “Click Profile ADAD 18-XXX” ADAD 18-XXX Test Provider Choose Funding Source Adult GEN1 or Adult SABG1.

1. Check Client List to Determine Client is not a Duplicate.

The screenshot shows the 'Client Search' interface. Annotations include:

- 1. Set Facility to "Blank"**: Points to the 'Facility' dropdown menu.
- 2. Set Case Status to "All Clients"**: Points to the 'Case Status' dropdown menu.
- 3. Click "Go"**: Points to the 'Go' button.

The interface includes a sidebar with navigation options like Home Page, Agency, Group List, Clinical Dashboard, Client List, Client Profile, Linked Consents, Payor Group Enrollment, Non-Episode Contact, Activity List, Episode List, System Administration, Reports, and Support Ticket. The main form contains fields for Agency, First Name, SSN, HI-WITS Training Client Id, Unique Client Number, Treatment Staff, Case Status, Other Number, Include Only Active Consents, Facility, Last Name, DOB, Provider Client ID, Primary Care Staff, Intake Staff, and Number Type. Below the form is a 'Client List (Export)' table with columns for Actions, Unique Client #, Full Name, DOB, SSN, and Gender.

2. Fill in ALL Yellow Fields on Client Profile Screen, Save then Click Activity List

The screenshot shows the 'Client Profile' interface. Annotations include:

- 1. Client First Name**: Points to the 'First Name' field.
- 2. Client Last Name**: Points to the 'Last Name' field.
- 3. Gender**: Points to the 'Biological Gender' dropdown menu.
- 4. Date of Birth**: Points to the 'DOB' field.
- 5. Ethnicity**: Points to the 'Ethnicity/Hispanic Origin' dropdown menu.
- 6. Race**: Points to the 'Selected Races' dropdown menu.
- 7. Preferred Race**: Points to the 'Race' dropdown menu.
- 8. Ethnicity**: Points to the 'Selected Detailed Ethnicities' dropdown menu.
- 9. Detailed Ethnicity**: Points to the 'Primary/Preferred Detailed' dropdown menu.
- 10. Click "Save"**: Points to the 'Save' button.
- 11. Click Activity List**: Points to the 'Activity List' link in the sidebar.

The interface includes a sidebar with navigation options like Home Page, Agency, Client List, Client Profile, Alternate Names, Additional Information, Military, Contact Info, Collateral Contact, Other Numbers, History, Authorization, Allergies, Linked Consents, Payor Group Enrollment, Non-Episode Contact, Activity List, Episode List, System Administration, and Reports. The main form contains fields for First Name, Middle Name, Last Name, Mother's Maiden Name, Biological Gender, DOB, SSN, Date of Death, Ethnicity/Hispanic Origin, Races, Selected Races, Race, Selected Detailed Ethnicities, Primary/Preferred Detailed, and a 'Has paper file' checkbox.

### 3. Click Start New Episode to Proceed to Intake Screen

The screenshot shows the HI-WITS Training interface. The top navigation bar includes the WITS logo, user name 'Afsharzadeh, Yoseb, BS', and a 'Logout' button. The left sidebar contains a menu with options like 'Home Page', 'Agency', 'Group List', 'Clinical Dashboard', 'Client List', 'Client Profile', 'Linked Consents', and 'Payor Group Enrollment'. The main content area displays a message: 'Please select a case, or click Start New Episode.' Below this is an 'Episode List' table with columns: Actions, Case #, Status, Facility, Intake By, Intake Date, Closed Date, Latest PE, and Domains. A red box with the text '1. Click "Start New Episode"' points to the 'Start New Episode' button in the top right corner of the main content area.

### 4. Fill in ALL Yellow Fields on Intake Screen

The screenshot shows the 'Intake Case Information' form in the HI-WITS Training interface. The form contains several fields, some of which are highlighted in yellow. Red boxes with numbered instructions point to these fields:
 

- 1. Select Initial Contact**: Points to the 'Initial Contact' dropdown menu.
- 2. Choose Source of Referral**: Points to the 'Source of Referral' dropdown menu.
- 3. Injection Drug User**: Points to the 'Injection Drug User' dropdown menu.
- 4. For ADAD Choose "Adult"**: Points to the 'Population' dropdown menu, where 'Adult' is selected.
- 5. Click "Save"**: Points to the 'Save' button at the bottom right of the form.

 Other fields include 'Intake Facility', 'Intake Staff', 'Case Status', 'Initial Contact Date', 'Intake Date', 'Pregnant at Admission', 'Due Date', 'Presenting Problem', 'Population Selected', and 'Selected Domains'.

### 5. Select Payor Group Enrollment from the Left Menu Pick then Click Link to Add Government Contract Enrollment

The screenshot shows the 'Payor List' table in the HI-WITS Training interface. The table has columns: Actions, Priority, Plan Type, Plan, Group, Contract, Member ID, Start Date, and End Date. Above the table are two links: 'Add Benefit Plan Enrollment' and 'Add Government Contract Enrollment'. Red boxes with numbered instructions point to these elements:
 

- 1. Select "Payor Group Enrollment"**: Points to the 'Payor Group Enrollment' option in the left sidebar menu.
- 2. Click "Add Government Contract Enrollment" Link**: Points to the 'Add Government Contract Enrollment' link above the table.

6. Choose “Click ProfileADAD 18-XXX” Contract, Select Adult GEN1 or Adult SABG1 for Plan-Group (Funding Source) ONLY. Then Click “Save”

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TEST PROVIDER, Test Facility  
Kaholic, AI | AXKA1220901 | 1  
Atsharzadeh, Yoseb, BS  
Logout  
SSRS Reports | Snapshot

Home Page  
Agency  
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Clinical Dashboard  
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Client Profile  
Linked Consents  
Payor Group Enrollment  
Non-Episode Contact  
Activity List  
Episode List  
System Administration  
Reports  
Support Ticket

**Payor List**  
Add Benefit Plan Enrollment | Add Government Contract Enrollment

Actions	Priority	Plan Type	Plan	Group	Contract	Member ID	Start Date	End Date

**Government Contract Billing Information**

Plan Type: Government Contract  
Contract: **Click ProfileADAD 18-XXXADAD 18-XXX Test Provider**  
Plan-Group: **ADAD 18-XXX Rural ADAD 18-XXX Test Provider**  
Subscriber #: **ADAD 18-XXX1 ADAD 18-XXX1 Test Provider ADOL**  
Administrative: **ADAD 18-XXX Rural ADAD 18-XXX Test Provider**

Payor Priority Order: 1  
Start Date: **3/22/2018**  
End Date: **3/22/2018**

**1. Select Click ProfileADAD 18-XXX Test Provider**  
**2. Choose Adult GEN1 or Adult SABG1**  
**3. Set Start Date**

Cancel Save

7. Select Program Enrollment from the Left Menu Pick

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ASAM  
Program Enroll  
Diagnosis List

**Client Activity List**

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	3/1/2018	3/22/2018	Completed
	Intake Transaction	3/1/2018	3/22/2018	Completed

**1. Select Program Enrollment**

## 8. Click Add Enrollment Link

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Home Page

Agency

Group List

Clinical Dashboard

Client List

Client Profile

Linked Consents

Payor Group Enrollment

Non-Episode Contact

Activity List

Intake

Drug Testing

Wait List

Tx Team

Program Enrollment

Program Name

Modality

Facility

From: 3/22/2017 To: 3/22/2018

Active Program Enrollments During Date Range

Clear Go

Program Enrollment List

Actions Program Name Start Date End Date Facility Notes

1. Click Add Enrollment

Finish

## 9. Add two New Program Enrollments, one Program for “Pre-Treatment” and another for “Care Coordination”

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Home Page

Agency

Group List

Clinical Dashboard

Client List

Client Profile

Linked Consents

Payor Group Enrollment

Non-Episode Contact

Activity List

Intake

Drug Testing

Wait List

Tx Team

Screening

Program Enrollment Profile

Facility Test Facility

Program Name Pre-Treatment

Program Staff Alsharzadeh, Yoseb, BS

Termination Reason

Notes

Start Date 3/1/2018

End Date

Enroll in Concurrent Program

Cancel Save Finish

1. Select "Pre-Treatment"

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Home Page

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Clinical Dashboard

Client List

Client Profile

Linked Consents

Payor Group Enrollment

Non-Episode Contact

Activity List

Intake

Drug Testing

Wait List

Program Enrollment Profile

Facility Test Facility

Days on Wait List 0

Program Name Care Coordination

Program Staff Alsharzadeh, Yoseb, BS

Termination Reason

Notes

Start Date 3/1/2018

End Date

Enroll in Concurrent Program

Cancel Save Finish

1. Care Coordination

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SSRS Reports Snapshot

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Screening

**Program Enrollment**

Program Name:  Facility:

Modality:

From: 3/22/2017 To: 3/22/2018

**1. Enrollment for Pre-Treatment**

**Enrollment for Care Coordination**

**Program Enrollment List**

Actions	Program Name	Start Date	End Date	Facility	Notes
	Pre-Treatment	3/1/2018		Test Facility	
	Care Coordination	3/1/2018		Test Facility	

Add Enrollment

Finish

10. Select Authorization Under Client Profile from the Left Menu Pick. Click Add New Authorization Record Link

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SSRS Reports Snapshot

Home Page  
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Additional Information  
Military  
Contact Info  
Collateral Contacts  
Other Numbers  
History  
Authorization  
Allergies

**Authorization List**

Actions	Auth #	Payor	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date

**1. Select Authorization**

**2. Click Add New Authorization Link**

Add New Authorization Record

11. Add Authorization for Pre-Treatment

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SSRS Reports Snapshot

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**Authorization**

Group Enrollment: ADAD Adult SABG 1 Status: Active

Plan: ADULT Contract: Click Profile ADAD 18-XXX - ADAD 18-XXX Test Provider / 7/1/2017 - 6/30/2018 - ADULT-ADAD Adult

Authorization #: 1470 Date Approved: 3/22/2018

Administering Agency: TEST PROVIDER Updated Date: 3/22/2018 11:05 AM

Effective Date: 3/1/2018

End Date: 3/31/2018

Service Package: Pre-Treatment

Level of Care: 0.5

**1. Set Date**

**2. Select Pre-Treatment**

**Authorized Services List**

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
	Assessment-R1 (H0001/R1)	1	\$90.00	\$0.00	\$0.00	1.00
	Placement Determination-R0 (T1023/R0)	1	\$50.00	\$0.00	\$0.00	1.00
	Screening-R0 (H0002/R0)	1	\$10.00	\$0.00	\$0.00	1.00

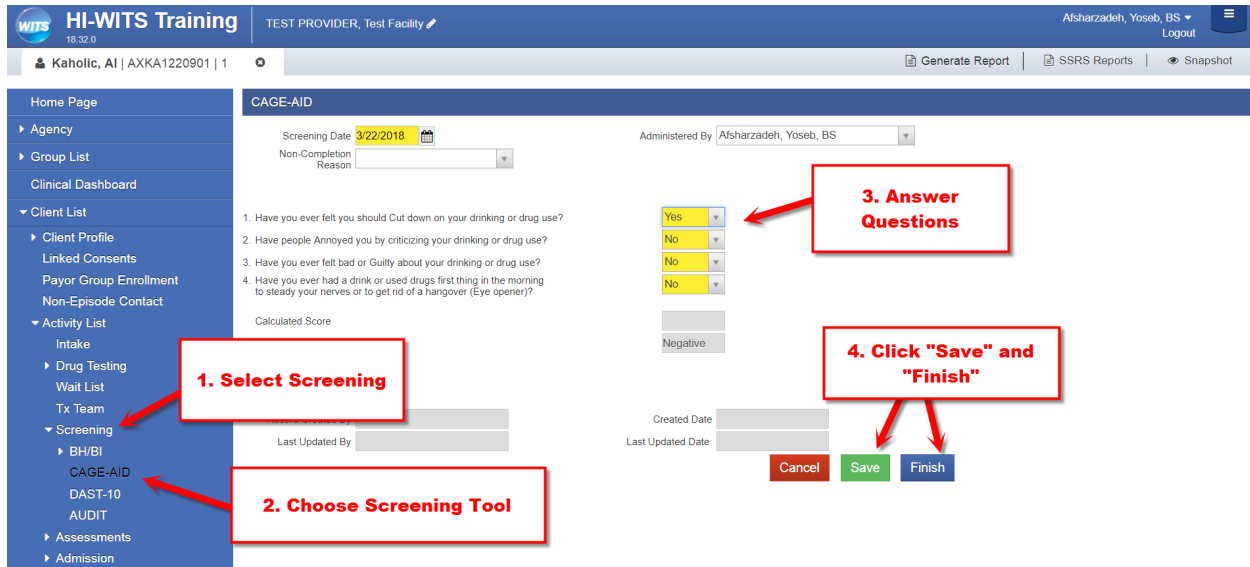
Total Authorized: \$150.00

Total Available: \$150.00

**3. Click "Save"**

Cancel Save Finish

## 12. Select Screening from the Left Menu Pick. Choose Preferred Screening Tool and Complete.



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**CAGE-AID**

Screening Date: 9/22/2018  
Non-Completion Reason:

Administered By: Alsharzadeh, Yoseb, BS

1. Have you ever felt you should Cut down on your drinking or drug use?

2. Have people Annoyed you by criticizing your drinking or drug use?

3. Have you ever felt bad or Guilty about your drinking or drug use?

4. Have you ever had a drink or used drugs first thing in the morning to steady your nerves or to get rid of a hangover (Eye opener)?

Calculated Score:

Created Date:   
Last Updated Date:

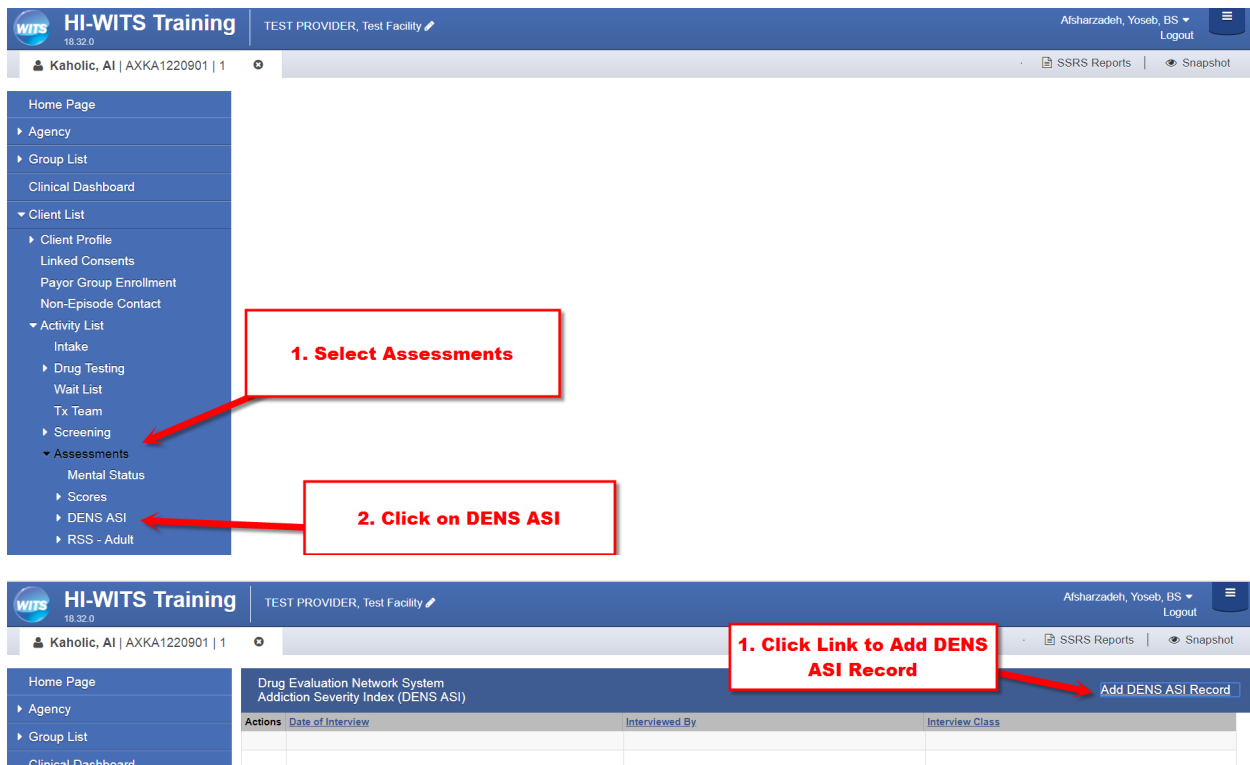
**1. Select Screening**

**2. Choose Screening Tool**

**3. Answer Questions**

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

## 13. Under Assessments on the Left Menu Pick, Choose DENS ASI and Complete



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**1. Select Assessments**

**2. Click on DENS ASI**

**1. Click Link to Add DENS ASI Record**

**Add DENS ASI Record**

Actions	Date of Interview	Interviewed By	Interview Class

# 14. Add three (3) Separate Encounters for: Screening (H0002/R0), Assessment (H0001/R1) and Placement Determination (T1023/R0) All Under Pre-Treatment Modality Release to Billing

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 Wait List  
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No results match your search criteria.

**Encounter Search**

Start Date: 3/22/2017 End Date: 3/22/2018  
 Rendering Staff: Service: Encounter Status: Program: Allow Disclosure of Note:

**1. Add Encounter** Clear Go

**Encounter List (Export)**

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status

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 ASAM  
 Program Enrollment  
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 Profile  
 Encounter Note  
 Services  
 Notes  
 Treatment Plan  
 Treatment  
 Outcomes  
 Follow-up  
 Discharge  
 Recovery Plan  
 Recovery Plan Rvw  
 Consent  
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 Episode List  
 System Administration  
 Reports  
 Support Ticket

**1. Billing Encounter**

**2. Pre-Treatment**

**3. Select Authorized Service**

**4. F99 (Not Otherwise Specified) Diagnosis**

**5. SOAP/ DAP Note and "Sign"**

**6. Click "Save"**

**7. Release to Billing**

**Encounter**

Note Type: Billing Encounter  
 ENC ID: Created Date: Billable: Yes  
 Program Name: 96-Test Facility/Pre-Treatment - 3/1/2018  
 Service: Screening R0 (H0002/R0)

Start Date: 3/1/2018  
 Start Time: End Time: Duration: # of Service Units/Sessions:

Rendering Staff: Afsharzadeh, Yoseb, BS  
 Supervising Staff: Attending Physician:

**Diagnoses for this Service**

Primary: F99-Mental disorder, not otherwise specified(ICD)  
 Secondary: Select an option  
 Tertiary: Select an option

Unsigned Notes  
 Signed Notes  
 Signed by Afsharzadeh, Yoseb, BS, 3/22/2018 6:33:52 PM:  
 D  
 A  
 P  
 Note:

Sign Note  
 Allow Disclosure? [No]

**Administrative Actions**

Release to Billing Cancel Save Finish

15. Create All Three (3) Encounters and Release to Billing. Encounter List Should Look Like This Below:

The screenshot displays the HI-WITS Training interface. The top navigation bar includes the WITS logo, 'HI-WITS Training', the user 'TEST PROVIDER, Test Facility', and the user 'Afsharzadeh, Yoseb, BS' with a 'Logout' link. The left sidebar contains a menu with options like 'Home Page', 'Agency', 'Group List', 'Clinical Dashboard', 'Client List', 'Client Profile', 'Linked Consents', 'Payor Group Enrollment', 'Non-Episode Contact', 'Activity List', 'Intake', 'Drug Testing', and 'Wait List'. The main content area is titled 'Encounter Search' and features search filters for 'Start Date' (3/22/2017), 'End Date' (3/22/2018), 'Rendering Staff', 'Encounter Status', 'Service', 'Program', and 'Allow Disclosure of Note'. Below the search filters is the 'Encounter List (Export)' table. The table has columns for 'Actions', 'Enc. ID', 'Rendering Staff', 'Program Name', and 'Status'. Three rows of encounters are listed, all with a status of 'Released'. Red arrows point to the 'Add Encounter' button and the 'Status' column of the table, with labels '1. Create Encounters' and '2. Release to Billing' respectively.

Actions	Enc. ID	Rendering Staff	Program Name	Status
	5872	Afsharzadeh, Yoseb, BS	Pre-Treatment	Released
	5871	Afsharzadeh, Yoseb, BS	Pre-Treatment	Released
	5870	Afsharzadeh, Yoseb, BS	Pre-Treatment	Released