

HI-WITS Training: Setting Up Clinical Dashboard

Lesson 9b

Situation: This Documentation Demonstrates how to Set up Clinical Dashboard

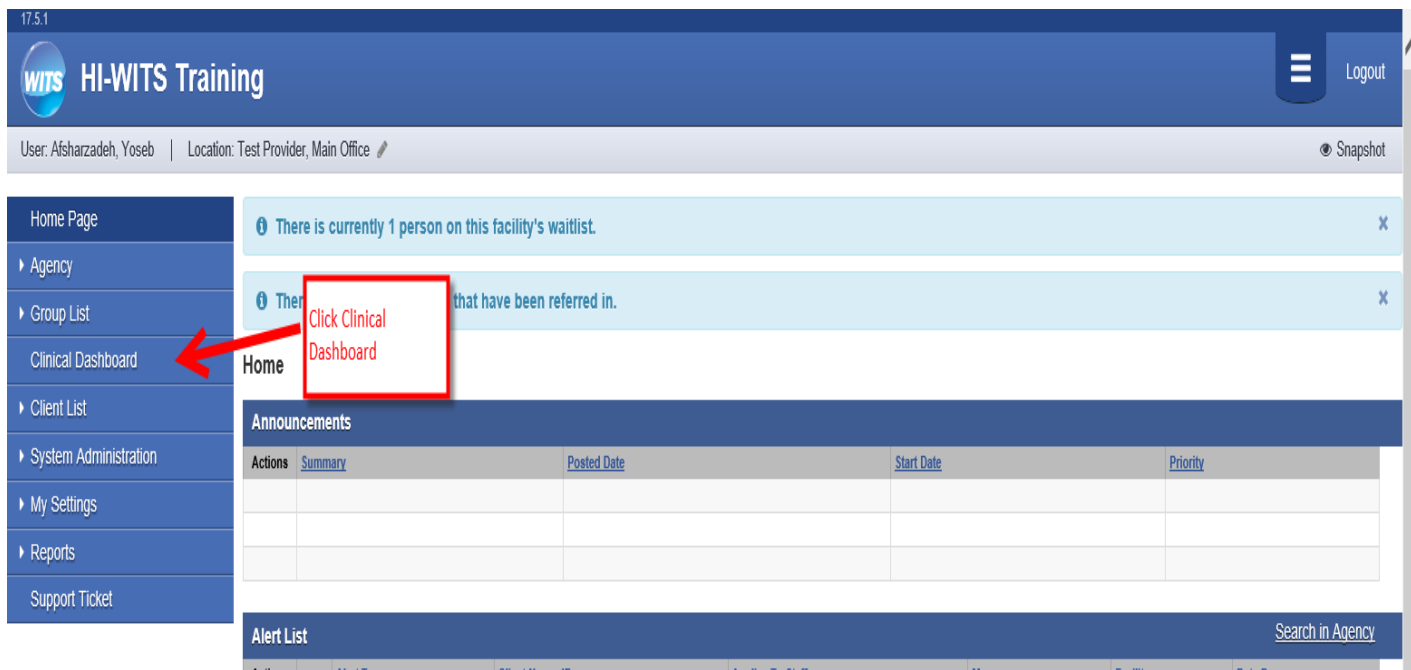
Purpose

The Clinical Dashboard allows staff members to view their caseloads and to view Feedback from their clinical supervisor. All feedback is stored and tracked over time

Locate the Clinical Dashboard

1. **Getting here:** The Clinical Dashboard is located on the navigation bar between the Group List and Client List.

Note: *The Treatment Team must be set up in order to display records. The clinical staff needs to be set as the Primary Care Member for all clients on caseload*



The screenshot shows the HI-WITS Training interface. The top navigation bar includes the WITS logo, the text "HI-WITS Training", and a "Logout" button. Below the navigation bar, the user information "User: Afsharzadeh, Yoseb" and "Location: Test Provider, Main Office" is displayed. The main content area features a left-hand navigation menu with items: Home Page, Agency, Group List, Clinical Dashboard, Client List, System Administration, My Settings, Reports, and Support Ticket. The "Clinical Dashboard" item is highlighted with a red arrow. A red box highlights the text "Click Clinical Dashboard" with an arrow pointing to the "Clinical Dashboard" menu item. The main content area displays a "Home" section with a table of "Announcements" and an "Alert List" section.

Actions	Summary	Posted Date	Start Date	Priority

Alert List	Search in Agency

Data Elements on the Clinical Dashboard

There are eleven (11) data elements for each episode of care:

- **Intake Date:** This is the intake date of the specified episode of care.
- **Client Name:** This is the clients name as it appears on the Client Profile.
- **ASI Date:** This reflects the date the ASI was completed WITS in the specified episode of care.
- **Admission Date:** This is the Admission date for the specified episode of care.
- **Treatment Plan:** This reflects the last Treatment Plan Start Date where the Tx Plan Status is “Active-Signed Off” or “Active-Not Signed Off” in the specified episode of care.
- **Tx plan review due:** This reflects the most current Tx Plan Review Due date for the specified episode of care.
- **Modality:** This reflects the treatment Modalities associated to the Program Enrollments that the client is enrolled in the selected episode of care.
- **Last Encounter Date:** This reflects the Start Date of the last Encounter Note in the specified episode of care.
- **Discharge date:** This reflects the Discharge Date if a Discharge has been complete on the specified episode of care.
- **Case Closed:** This reflects the Case Closed Date if the episode of care is closed.
- **Primary Staff:** This reflects the staff that has been designated as the primary staff on the specified episode of care based on the hierarchy of Primary Staff Set-up.

The screenshot displays the HI-WITS Training Clinical Dashboard Search interface. The top navigation bar includes the WITS logo, the text 'HI-WITS Training', and a 'Logout' button. Below the navigation bar, the user's name 'User: Afsharzadeh, Yoseb' and location 'Location: Test Provider, Main Office' are shown. The main content area features a search form with the following fields: 'Intake Date Range From' and 'To' (date pickers), 'Case Status' (dropdown menu), 'Clients with Open Ca...' (dropdown menu), 'Modality' (dropdown menu), 'Primary Staff' (text input), and 'Selected Staff' (text input). There are 'Clear' and 'Go' buttons below the search form. A red box labeled 'Data Elements' points to the 'Modality' column in the table below. The table has 11 columns: 'Actions', 'Intake date', 'Client Name', 'ASI Date', 'Admission Date', 'Treatment Plan', 'Tx plan review due', 'Modality', 'Last Encounter Date', 'Discharge date', 'Case Closed', and 'Primary Staff'.

Actions	Intake date	Client Name	ASI Date	Admission Date	Treatment Plan	Tx plan review due	Modality	Last Encounter Date	Discharge date	Case Closed	Primary Staff

Viewing an Individual Client Record and Reviewing Feedback

1. Narrow the records to review on the Clinical Dashboard by entering **Intake Date Range From** and **To** fields, **Case Status** and **Modality**.

2. Click **Go**.

NOTE: The Selected Staff defaults to the person logged into WITS. Client activities highlighted in blue serve as a link that can be used to quickly navigate to that specific activity. Client activities highlighted in red are past due. Client activities highlighted in yellow have unread Feedback.

3. Click **Read Feedback** in the Actions column for the client record.

4. Change the Status field to **Read**.

5. Click **Save** and **Finish**.

Viewing the Feedback Summary Report

1. Click **View Feedback Summary** in the Administrative Actions box at the bottom of the Clinical Dashboard.
2. Enter the Feedback **Start Date**.
3. Enter the Feedback **End Date** and Feedback **Status** (these fields are optional).
4. Click **On Screen**.

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WITS HI-WITS Training

User: A, Staff | Location: Test Provider, Main Office

Clinical Dashboard Search

Intake Date Range From To

Case Status Clients with Open Ca... Modality

Primary Staff Selected Staff

Clear Go

Actions	Intake date	Client Name	ASI Date	Admission Date	Treatment Plan	Tx plan review due	Modality	Last Encounter Date	Discharge date	Case Closed	Primary Staff
	6/12/2008	Farve, Brett		6/12/2008			Continuing Care	9/14/2008	9/16/2008		A, Staff
	2/12/2009	Columbus, Christopher		2/16/2009			Continuing Care	9/12/2014	9/30/2011		A, Staff
	12/10/2013	Luther, Rom		12/10/2013			Intensive Outpatient Treatment	9/22/2014			A, Staff
	9/29/2014	Bubble, Barney	9/2/2014	9/29/2014			Intensive Outpatient Treatment	9/12/2014			A, Staff

Administrative Actions

[View Feedback Summary](#)

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User: A, Staff | Location: Test Provider, Main Office

Feedback Summary Report

Feedback Start Date

Feedback End Date

Feedback Status

Staff Selected Staff

On Screen Cancel