

HI-WITS Training: Setting Up Clinical Dashboard

Lesson 9b

Situation: This Documentation Demonstrates how to Set up Clinical Dashboard

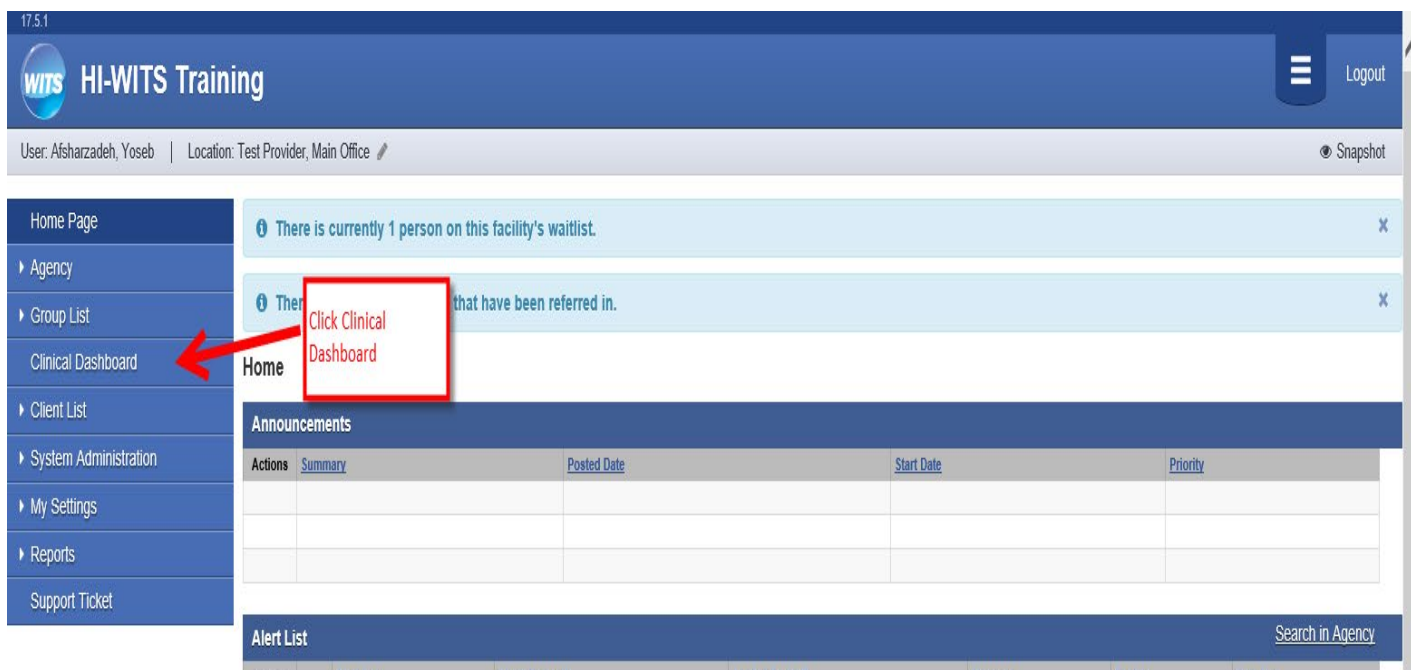
Purpose

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's name "User: Afsharzadeh, Yoseb" and location "Location: Test Provider, Main Office" are displayed. The main content area features a left-hand navigation menu with the following items: Home Page, Agency, Group List, Clinical Dashboard, Client List, System Administration, My Settings, Reports, and Support Ticket. The "Clinical Dashboard" item is highlighted in blue, and a red arrow points to it from a red box containing the text "Click Clinical Dashboard". The main content area displays a notification: "There is currently 1 person on this facility's waitlist." Below this, there is a section for "Announcements" with a table that has columns for "Actions", "Summary", "Posted Date", "Start Date", and "Priority". At the bottom, there is an "Alert List" section with a "Search in Agency" button.

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. At the top, there is a navigation bar with the WITS logo, the text 'HI-WITS Training', and a 'Logout' button. Below this, a user profile bar shows 'User: Afsharzadeh, Yoseb' and 'Location: Test Provider, Main Office'. The main content area is divided into a left sidebar with navigation links (Home Page, Agency, Group List, Clinical Dashboard, Client List, System Administration, My Settings, Reports, Support Ticket) and a central search area. The search area includes filters for 'Intake Date Range From' to 'To', 'Case Status', 'Clients with Open Ca...', 'Modality', 'Primary Staff', and 'Selected Staff'. Below the search area are 'Clear' and 'Go' buttons. At the bottom, a table lists 11 data elements: 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. A red box labeled 'Data Elements' points to the 'Modality' column.

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**.

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 | 9/15/2008 | | A, Staff |
| | 2/1/2009 | Columbus, Christopher | | 2/16/2009 | | | Continuing Care | 9/1/2014 | 8/30/2011 | | A, Staff |
| | 12/10/2013 | Luther, Born | | 12/10/2013 | | | Intensive Outpatient Treatment | 9/2/2014 | | | A, Staff |
| | 8/29/2014 | Rubble, Barney | 9/2/2014 | 8/29/2014 | | | Intensive Outpatient Treatment | 9/1/2014 | | | A, Staff |

Administrative Actions

[View Feedback Summary](#)

HI-WITS Training

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

Feedback

Note: This is a test to request feedback.

Client Name Farve, Brett

For Staff A, Staff

Status **Unread**

Created by Manager, Staff

Created date 10/20/2014 5:51 PM

Updated by Manager, Staff

Updated date 10/20/2014 5:51 PM

Cancel Save 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**.

17.5.1

WITS HI-WITS Training Logout

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

Home Page

- Agency
- Group List
- Clinical Dashboard
- Client List
- System Administration
- My Settings
- Reports

Clinical Dashboard Search

Intake Date Range From To

Case Status Clients with Open Ca... Modality

Primary Staff Selected 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 |
|---------|-------------|-----------------------|----------|----------------|----------------|--------------------|--------------------------------|---------------------|----------------|-------------|---------------|
| | 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](#)

17.5.1

WITS HI-WITS Training Logout

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

Home Page

- Agency
- Group List
- Clinical Dashboard
- Client List
- System Administration
- My Settings
- Reports

Feedback Summary Report

Feedback Start Date

Feedback Status

Feedback End Date

Staff Selected Staff