

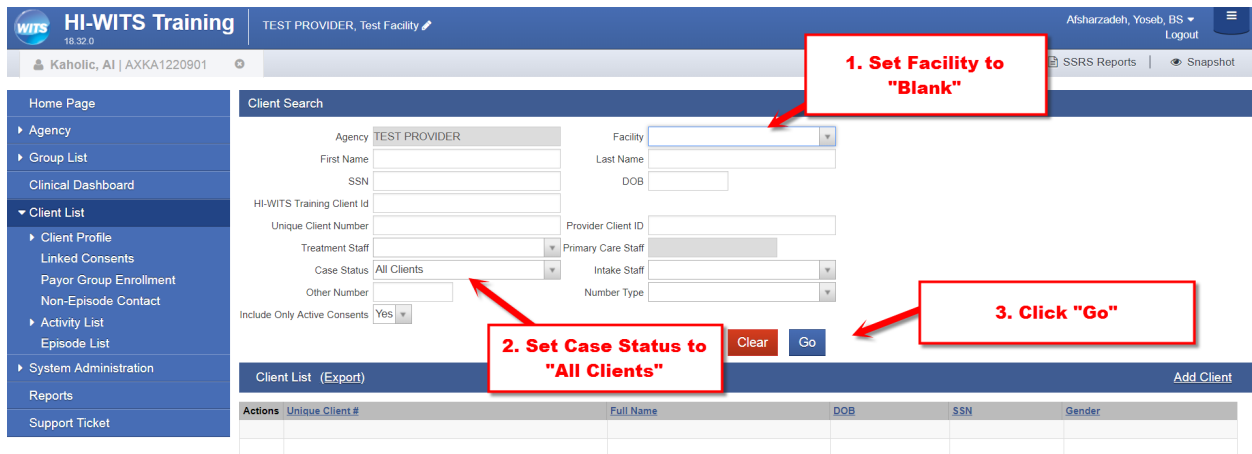
HI-WITS Training: Add A New Client for LEAD

Lesson 1

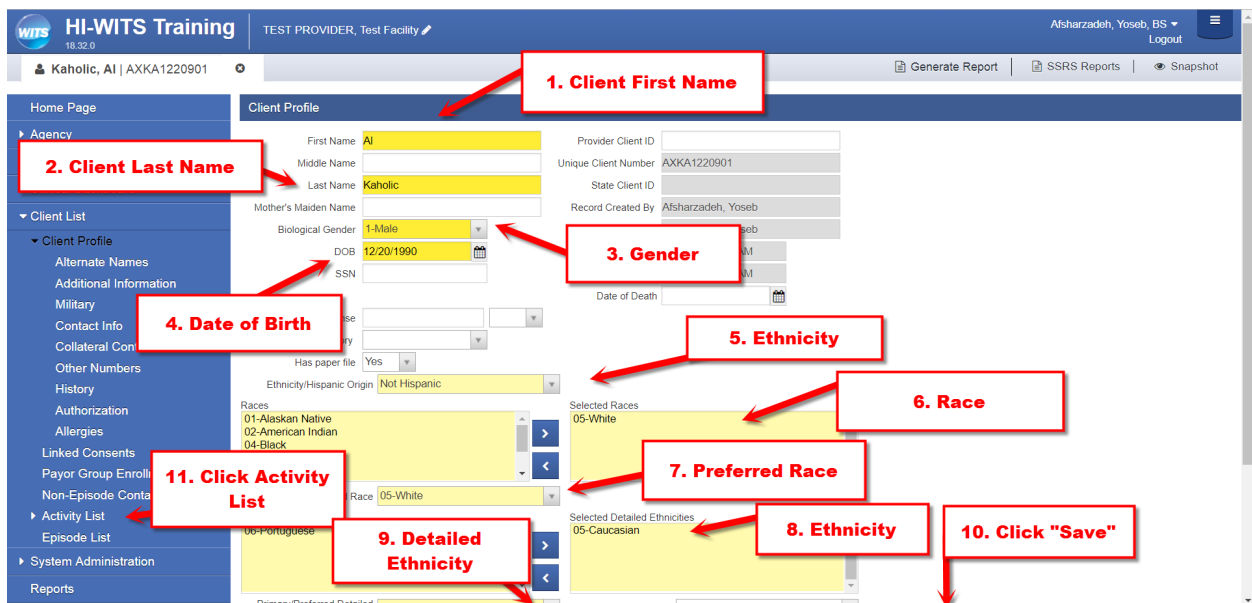
Situation: When someone gets accepted for the LEAD Program, Users will add the Client to the System and create Encounters

Note: Use Referral Process Below Only if Referring to Treatment

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



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



3. Click Start New Episode to Proceed to Intake Screen

HI-WITS Training | TEST PROVIDER, Test Facility | Afsharzadeh, Yoseb, BS | Logout

Kaholic, Al | AXKA1220901 | SSRS Reports | Snapshot

Please select a case, or click Start New Episode.

1. Click "Start New Episode"

Actions	Case #	Status	Facility	Intake By	Intake Date	Closed Date	Latest PE	Domains

4. Fill in ALL Yellow Fields on Intake Screen

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1. Select Initial Contact

2. Choose Source of Referral

3. Injection Drug User

4. For ADAD Choose "Adult"

5. Click "Save"

Intake Case Information

Intake Facility: Test Facility

Intake Staff: Afsharzadeh, Yoseb, BS

Initial Contact: [Yellow Field]

Source of Referral: [Yellow Field]

Case # 1

Case Status: Open Active

Initial Contact Date: [Yellow Field]

Intake Date: 3/22/2018

Pregnant at Admission: 2-No

Due Date: [Yellow Field]

Injection Drug User: [Yellow Field]

Presenting Problem (Client's Own Words): [Yellow Field]

Population: Adolescent, Adult, Child, Father with Child

Population Selected: [Yellow Field]

Domains: [Yellow Field]

Selected Domains: Treatment

5. Click Add Payor Group Enrollment

The screenshot shows the 'Intake Case Information' form in HI-WITS Training. The left sidebar menu is expanded to 'Client List', and 'Payor Group Enrollment' is highlighted with a red box and an arrow pointing to it. The main form contains various dropdown menus for client information, including location, staff, contact details, source of referral, employment status, marital status, living arrangement, population, and domains.

6. Click Add Government Enrollment

The screenshot shows the 'Payor List' table in HI-WITS Training. The top right navigation area has 'Add Government Contract Enrollment' highlighted with a red box and an arrow. The table below has columns for Actions, Priority, Plan Type, Plan, Group, Contract, Member ID, Start Date, and End Date.

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

7. Select ADAD 19-XXX Contract. Set Start Date Same as Intake Date. Select Appropriate Funding Source. If Client Requires Both Funding Sources Add Them Separately.

1. Select 19-XXX Contract

2. Set Start Date Same as Intake Date

3. Select Ohana Zone if Applicable

4. Select Lead if Applicable

8. Under Activity List, Click Add Enrollment.

1. Under Activity List

2. Click Add Enrollment

9. Select LEAD program and Click Save

1. Select LEAD Program

2. Click "Save"

10. Under Activity List, Choose Encounters. Click Add Encounter to Add Encounter

1. Under Activity List Choose Encounters

2. Click Add Encounter

Actions	Svc Date	Service	ENC.ID	Rendering Staff	Program Name	Status

11.

12. Complete Encounter. Use F99 for Diagnosis if one Doesn't Exist

The screenshot displays the 'Billing Encounter' form in the HI-WITS Training system. The interface includes a top navigation bar with the user's name 'Shmoe, Joe' and the program name 'Mental Health Kokua, Ke Hale A Ke Ola'. The main form area contains fields for 'Note Type' (set to 'Billing Encounter'), 'ENC ID', 'Program Name', 'Service', 'Service Location', 'Diagnoses for' (with Primary, Secondary, and Tertiary dropdowns), 'End Date', 'End Time', and 'Service Units/Sessions'. A 'Signed Notes' section is visible with a 'Sign Note' button and an 'Allow Disclosure?' dropdown. At the bottom, there are 'Administrative Actions' including a 'Release to Billing' link and 'Cancel', 'Save', and 'Finish' buttons. Seven red callout boxes with white text and red arrows point to specific elements: 1. 'Billing Encounter' points to the Note Type dropdown; 2. 'Select Service' points to the Service dropdown; 3. 'Input 1 for Service Units' points to the Service Units/Sessions field; 4. 'Type F99 (Unspecified) in Primary Diagnosis Drop-Down' points to the Primary diagnosis dropdown; 5. 'Add Note Click Sign' points to the Sign Note button; 6. 'Click Save' points to the Save button; 7. 'Click Release to Billing' points to the Release to Billing link.

Note: See Below Step #20 for Adding DENS-ASI. If Client Needs Referral and Consent go to Step #13 and Continue.

13. Under Activity List select Consent from the Left Menu Pick.

Activity	Start Date	End Date	Status
Consent	6/1/2016	6/10/2016	Completed
Consent	6/10/2016	5/26/2016	Not Applicable

14. Click Add New Consent Record

Client Consent List

Actions	Start Date	Disclosed To	Status	Signed?

15. Select Disclose to Agency, Select FacilityC

HI-WITS Training | TEST PROVIDER, Main Office | Afsharzadeh, Yoseb, BS | Logout

Bidges, Jeff | JXBI0106751 | 1 | SSRS Reports | Generate Report | Snapshot

Client Disclosure Agreement

Note: Consented information may not be redisclosed.

Client Name: Bidges, Jeff
Unique Client Number: JXBI0106751
Disclosed From Agency: TEST PROVIDER

Entitles with Disclosure Agreements: Salvation Army-Addiction Treatment

System Agency: Yes

Disclosed To Agency: Salvation Army-Addiction Treatment

Facility: Main Facility

Disclosed To Entity (Non System Agency):

Purpose for disclosure: Transfer for Treatment

Earliest date of services to be consented: 5/1/2016

Has the client signed the paper agreement form: No

Client Information To Be Consented

Expiration Type: Date Signed(DS) | Yes | No

Client Information Options | Disclosure Selection

1. Select Disclose to Agency

2. Select Facility

16. Set Parameters for Information to be Consented, Click Save (Profile, Consent and ASI)

Client Information To Be Consented

Expiration Type: Date Signed(DS) | Yes | No

Client Information Options

Disclosure Selection

Comments

Other Disclosures

Cancel Save

1. Set Parameters

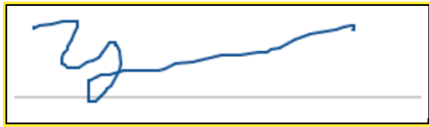
2. Click Save

17. Have Client Sign the Consent click Save, a Mouse can be Used to Sign

Legal Notice Center (1/2007) Handbook on legal issues for computer-based programs (1/2008), pp. 1, 12, & 17. New York: NARA.

PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT

This notice accompanies a disclosure of information concerning a client in alcohol/drug abuse treatment, made to you with the consent of such client. This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.

Signature of participant: 

1. Client can Sign with a Mouse

Note: Use Referral Instructions if Referring to Treatment

18. Click Create Referral Using this Disclosure Agreement Link

WITS HI-WITS Training 18.25.2 TEST PROVIDER, Main Office Alsharzadeh, Yoseb, BS Logout

Bidges, Jeff | JXBI0106751 | 1 SSRS Reports | Generate Report | Snapshot

- 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

Client Disclosure Agreement

[Create Referral Using this Disclosure Agreement](#)

Note: Consented information may not be redisclosed.

Client Name: Bidges, Jeff
Unique Client Number: JXBI0106751
Disclosed From Agency: TEST PROVIDER

Entities with Disclosure Agreements	Salvation Army-Addiction
System Agency	Yes
Disclosed To Agency	Salvation Army-Addiction Treatment
Disclosed To Entity (Non System Agency)	
Purpose for disclosure	Transfer for Treatment
Earliest date of services to be consented	5/1/2016
Has the client signed the paper agreement form	Yes
Date client signed consent	11/1/2017

Facility: Main Facility

Client Information To Be Consented

Expiration Type:

*Expiration type is required for disclosure activities.

Client Information Options: Disclosure Selection:

1. Click Create Referral Using this Disclosure Agreement

19. Set Referral Parameters

The screenshot shows the 'Referral' form in the WITS system. It is divided into two main sections: 'Referred By' and 'Referred To'. The 'Referred By' section includes fields for Agency (TEST PROVIDER), Facility (Main Office), Staff Member (Afsharzadeh, Yoseb, BS), Program (16-Main Office/Intensive Outpatient : 5/1/2016 - 6...), State Reporting Category (Intensive Outpatient Treatment), Reason (No capacity), and consent verification options. The 'Referred To' section includes Signed Consents (Salvation Army-Addiction Treatment), Agency (Salvation Army-Addiction Treatment), Facility (Main Facility), Staff Member, Program (Care Coordination), and State Reporting Category. At the bottom, there are 'Consents Granted' details and buttons for 'Cancel', 'Save', and 'Finish'. Four red callout boxes with arrows point to specific elements: '1. Select Reason' points to the 'Reason' dropdown; '2. Select Program' points to the 'Program' dropdown; '3. Answer Drop-Downs' points to the 'Is Consent Verification Required?' and 'Continue This Episode of Care?' dropdowns; and '4. Click Save' points to the green 'Save' button.

Note: Add Drug Evaluation Network System Addiction Severity Index (DENS ASI)

20. Under Assessments Select DENS ASI, then Click Add DENS ASI Record Link

The screenshot shows the WITS interface. On the left is a navigation menu with 'Assessments' expanded to show 'DENS ASI'. A red callout box '1. Click DENS ASI' points to this menu item. The main area displays a table titled 'Drug Evaluation Network System Addiction Severity Index (DENS ASI)'. The table has columns for 'Actions', 'Date of Interview', 'Interviewed By', and 'Interview Class'. A red callout box '2. Click Add DENS ASI Record' points to the 'Add DENS ASI Record' link in the top right corner of the table area. The table contains one row with 'Date of Interview' 5/30/2016 and 'Interviewed By' Afsharzadeh, Yoseb, BS.

21. Complete ALL Yellow Highlighted Fields for ALL DENS ASI (+- 36 pages)

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Dogg, Snoop | SXDO1220951 | 1 | Generate Report | SSRS Reports | Snapshot

DENS: General Profile

General Client Information (G4-G9)

G4 Date of Admission 5/30/2016

G5 Date of Interview 5/30/2016

G6 Class

G9 Contact Code

Question Hints | Comments

Cancel Save Finish

22. Click Diagnosis List Under Activity List on the Left Menu Pick.

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Koholic, AI | AXK00106741 | 1 | SSRS Reports | Snapshot

Client Activity List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	8/1/2018	8/31/2018	Completed
	DENS ASI Assessment	8/1/2018	8/31/2018	Completed
	Intake Transaction	8/1/2018	8/31/2018	Completed
	Client Program Enrollment (DUI)	8/1/2018	8/31/2018	Completed
	Consent (Alcoholic Rehabilitation Services of Hawaii, Inc)	8/1/2018	8/31/2018	Completed
	Interpretative Summary (DENS ASI)	8/1/2018	9/4/2018	Completed
	Referral (Alcoholic Rehabilitation Services of Hawaii, Inc)	8/31/2018	8/31/2018	Completed

1. Click Diagnosis List

23. Click the Add New Diagnosis Link

The screenshot shows the HI-WITS Training interface. The top navigation bar includes the WITS logo, 'HI-WITS Training 18.40.0', 'Division of Driver Education, Anne Assessor', and user information 'Afsharzadeh, Yoseb, BS' with a 'Logout' link. Below the navigation bar, the user's name 'Koholic, AI | AXKO0106741 | 1' is displayed. The main content area is titled 'Diagnosis List' and contains a table with columns for 'Actions', 'Principal Behavioral (Primary)', 'Principal Medical', 'Source', 'Date & Time', and 'Diagnosing Clinician'. A red box highlights the 'Add New Diagnosis' link in the top right corner of the table area, with an arrow pointing to it. The text '1. Click Add New Diagnosis Link' is written inside the box. On the left side, there is a blue sidebar 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', 'Wait List', 'Tx Team', 'Screening', 'Assessments', 'Admission', 'ASAM', 'Program Enroll', and 'Diagnosis List'.

24. Click the Edit Diagnosis Link

The screenshot shows the HI-WITS Training interface for editing a diagnosis. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Client Diagnosis' and contains a form with fields for 'Primary', 'Secondary', and 'Tertiary' diagnosis types. To the right of these fields are 'Effective Date' (12/7/2018), 'Expiration Date', and 'Time' (7:16 PM). Below these fields are 'Diagnosing Clinician' and 'GAF Score' fields. The form also includes three tables for 'Behavioral Diagnosis', 'Medical Diagnosis', and 'Psychosocial Diagnosis', each with columns for 'Code', 'Description', 'Comments', and 'Principal'. At the bottom right of the form, there are 'Cancel', 'Save', and 'Finish' buttons. A red box highlights the 'Edit Diagnosis' link in the top right corner of the form area, with an arrow pointing to it. The text '1. Click Edit Diagnosis Link' is written inside the box. The left sidebar menu is also visible, showing 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', 'Wait List', 'Tx Team', 'Screening', 'Assessments', 'Admission', 'ASAM', 'Program Enroll', 'Diagnosis List', 'Encounters', and 'Notes'.

25. Set Type to Behavioral, Either Type or Search Specific ICD-10 Diagnosis then set Principal Diagnosis to “Yes” Click “Save” Click “Finish” once done

The screenshot displays the HI-WITS Training interface. The top navigation bar includes the WITS logo, 'HI-WITS Training 18.40.0', the user 'Koholic, AI | AXKO0106741 | 1', and the user 'Alsharzadeh, Yoseb, BS'. The left sidebar contains a menu with options like 'Home Page', 'Agency', 'Group List', 'Clinical Dashboard', and 'Client List'. The main content area is titled 'Client Diagnosis' and features a form with the following elements:

- Type:** A dropdown menu set to 'Behavioral' (Callout 1).
- Diagnosis:** A dropdown menu with 'Select an option' (Callout 2).
- Principal Diagnosis:** A dropdown menu set to 'No' (Callout 3).
- Comments:** A text input field with a placeholder 'Please enter 2 or more characters'.
- Buttons:** 'Clear' and 'Save' buttons (Callout 4).

Below the form are three tables for 'Behavioral Diagnosis', 'Medical Diagnosis', and 'Psychosocial Diagnosis', each with columns for 'Actions', 'Code', 'Description', 'Comments', and 'Principal'.