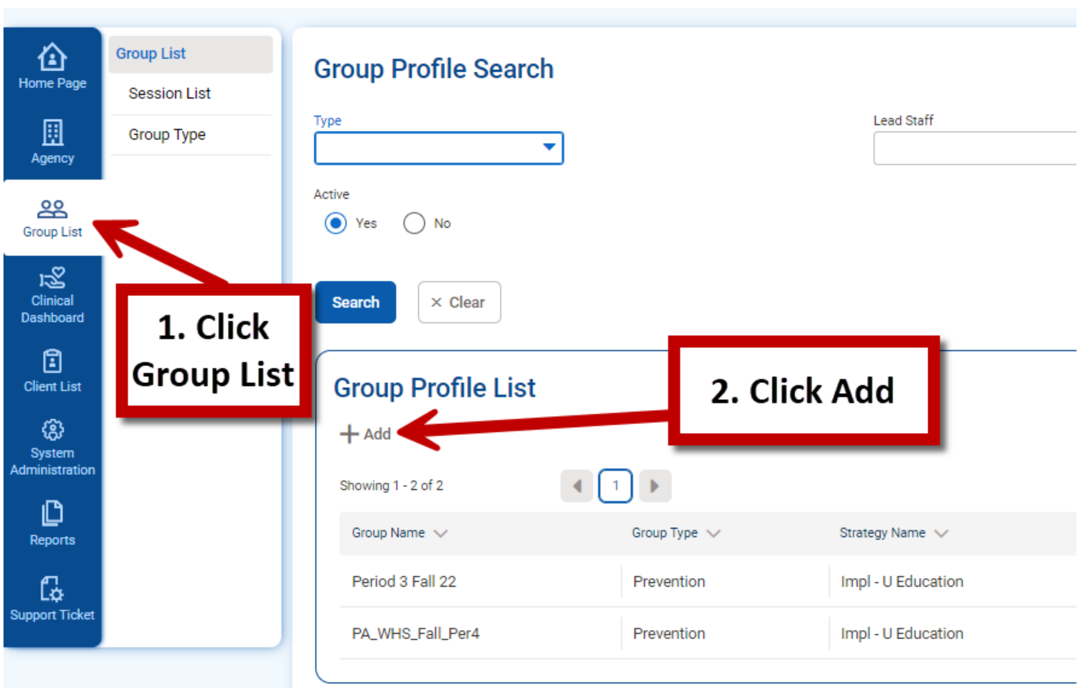
Individual Based Strategy Implementation

This document provides guidance on (1) creating a group, (2) adding participants to the WITS system, (3) adding participants to a group, and (4) entering data for individual-based activities.

Note: Please make sure you are in the right Implementation Facility.

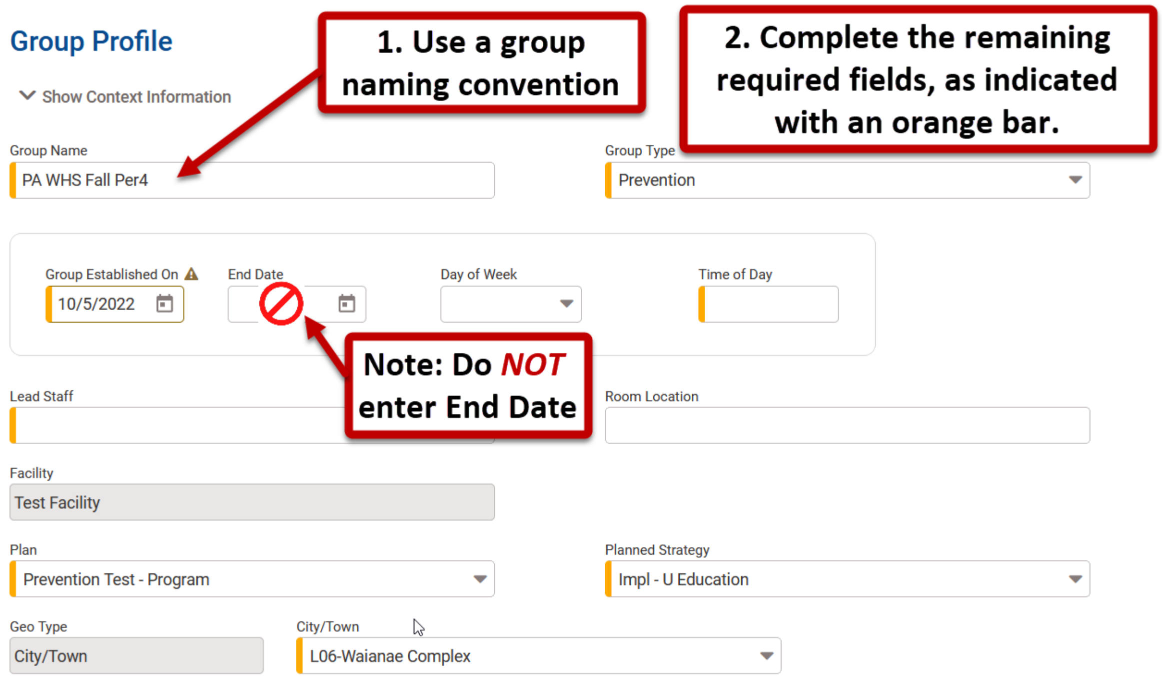
1. Creating a Group

a. Create a group by selecting **Group List** from the left menu panel.
b. Click **Add**.

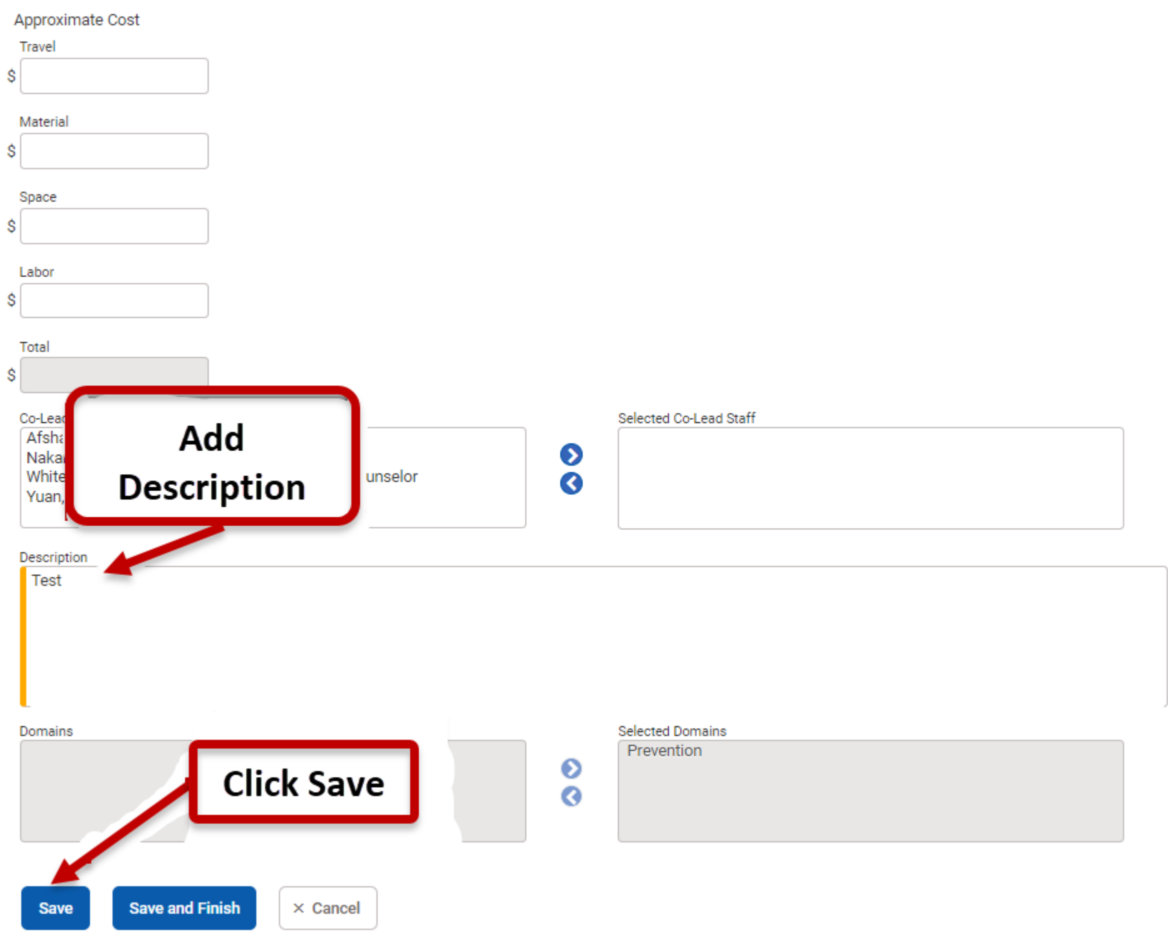


c. Complete the required fields: **Group Name**, **Group Type**, **Group Established On**, **Time of Day**, **Lead Staff, Plan**, **Planned Strategy**, and **City/Town (Complex).**

Note: Do NOT enter the End Date.

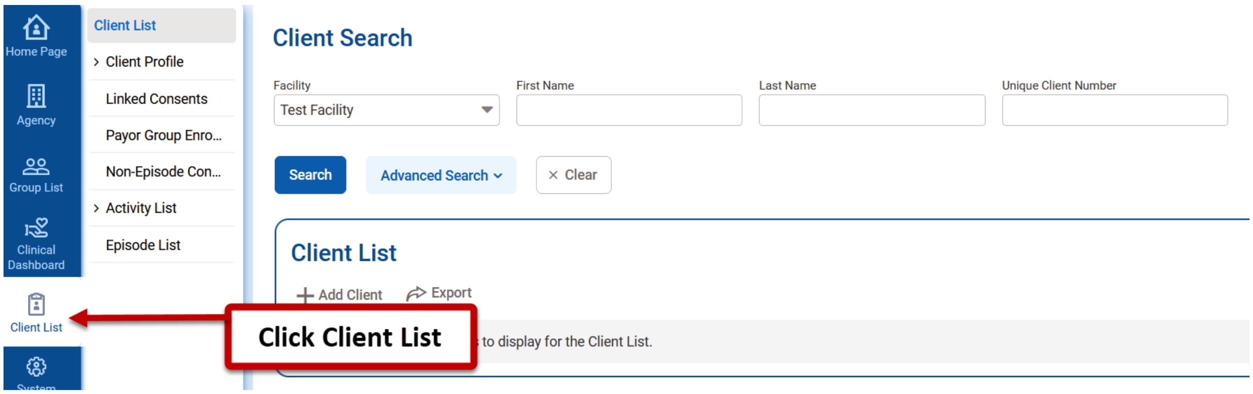


d. Add **Description** and **Save**.

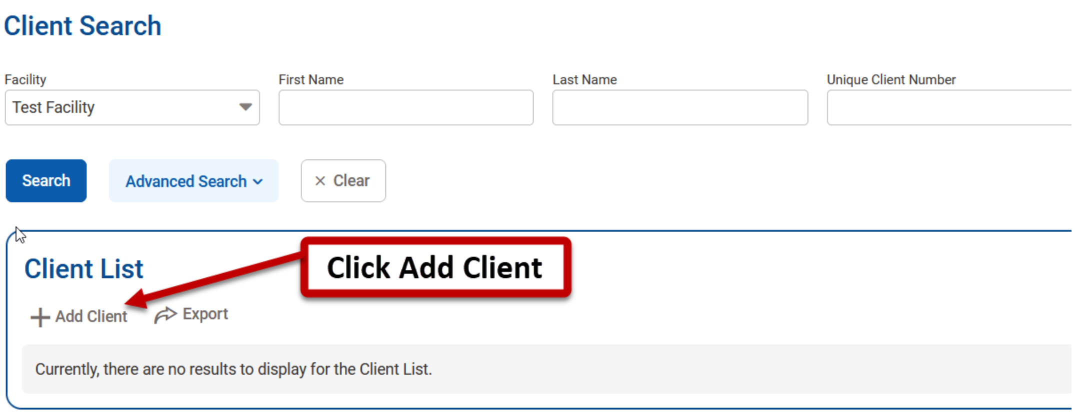


2. Adding Participants into the WITS System

a. Add participants into the WITS system by clicking on **Client List** from the left menu panel.



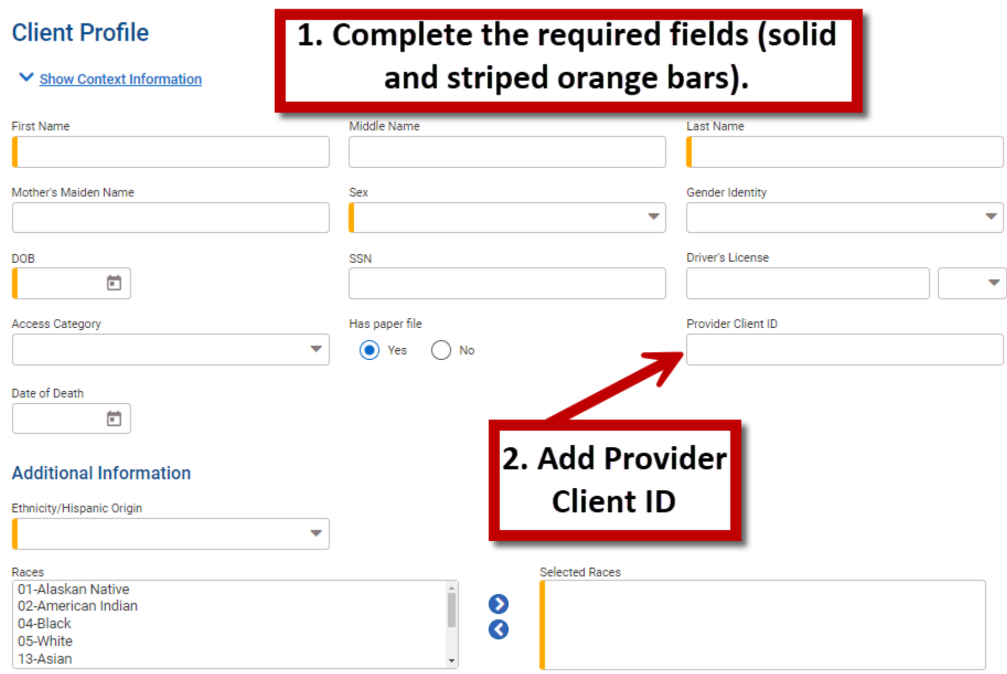
b. Click **Add Client**



c. Add the Required fields to **Client Profile**: **First Name**, **Last Name**, **Sex**, **DOB**, **Ethnicity/Hispanic Origin**, and **Selected Races.**

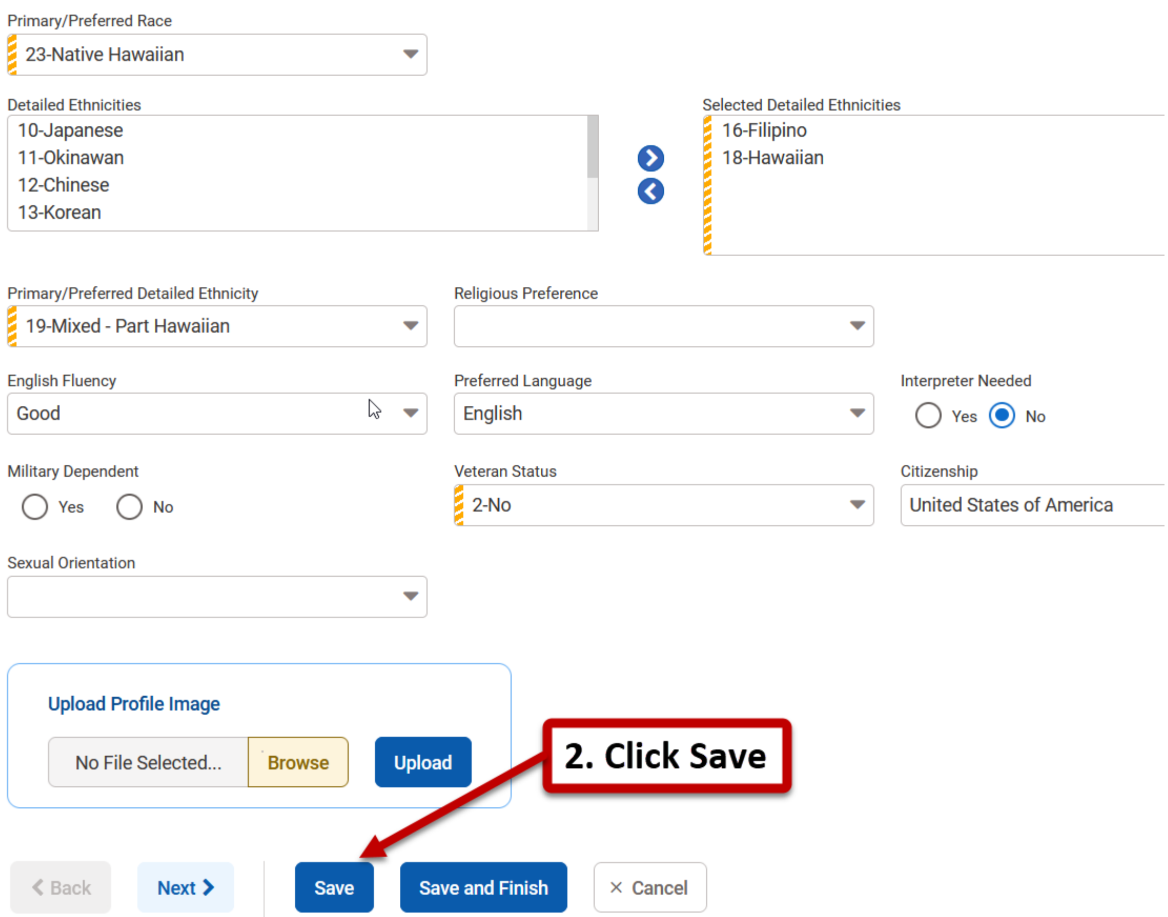
d. Add **Provider Client ID**.

Note: Each Provider Client ID consists of two parts: Site name and a 3-digit unique participant number ID, e.g., Hilo-001. This ID is to match the Client ID you assigned in your Airtable E01 table.

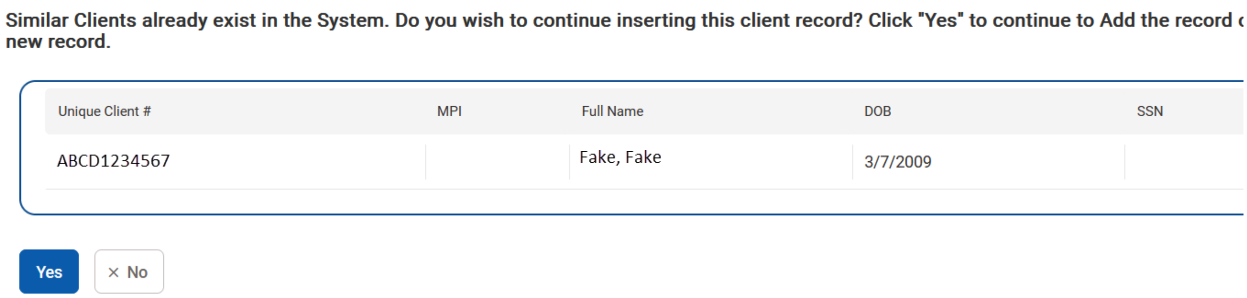


e. Add **Primary/Preferred Race**, **Selected Detailed Ethnicities**, **Primary/Preferred Detailed Ethnicity**, and **Veteran Status**.

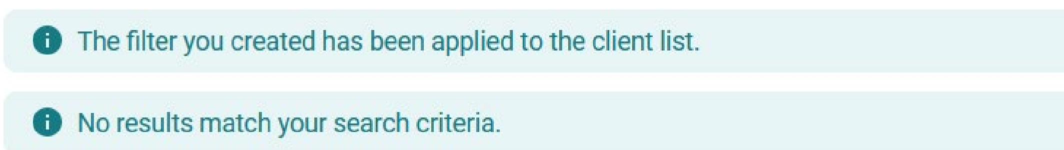
f. Click **Save**.



Note: The system will identify duplicate clients by stating the following: *Similar Clients already exist in the System. Do you wish to continue inserting this client record?* Click **Yes** to continue to **Add** the record or **No** to **Cancel** the creation of the new record.

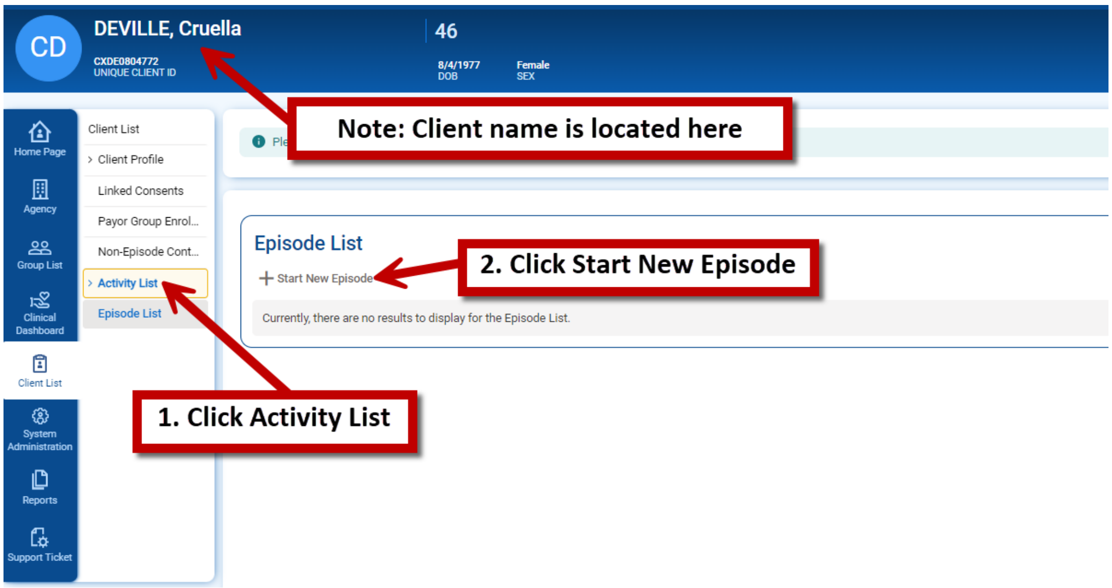


Note: After saving the client, the below prompts will appear.



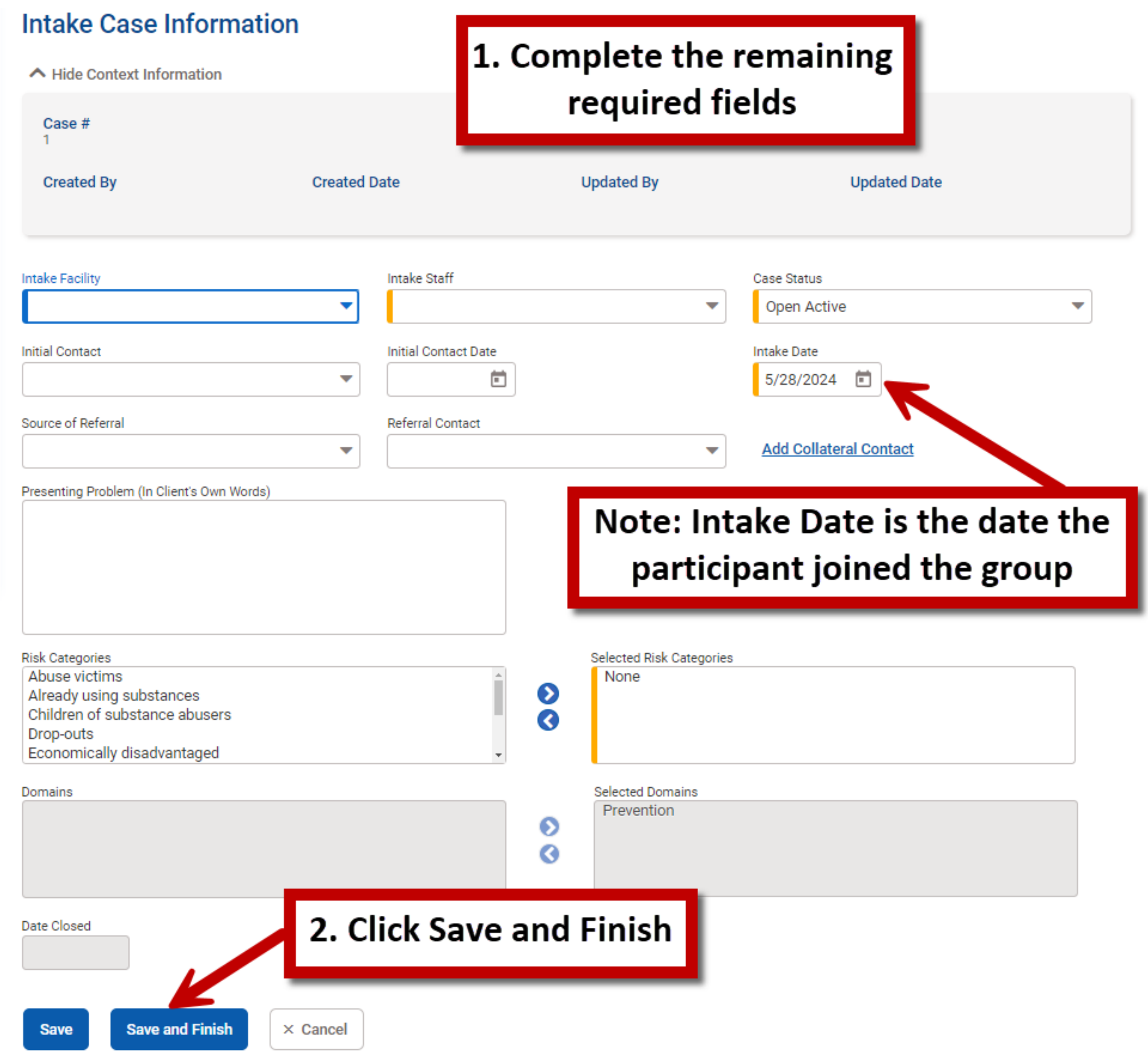
g. Click on **Activity List** from the left menu panel (with the current client named in the blue bar at top of the screen).

h. Click **Start New Episode**.

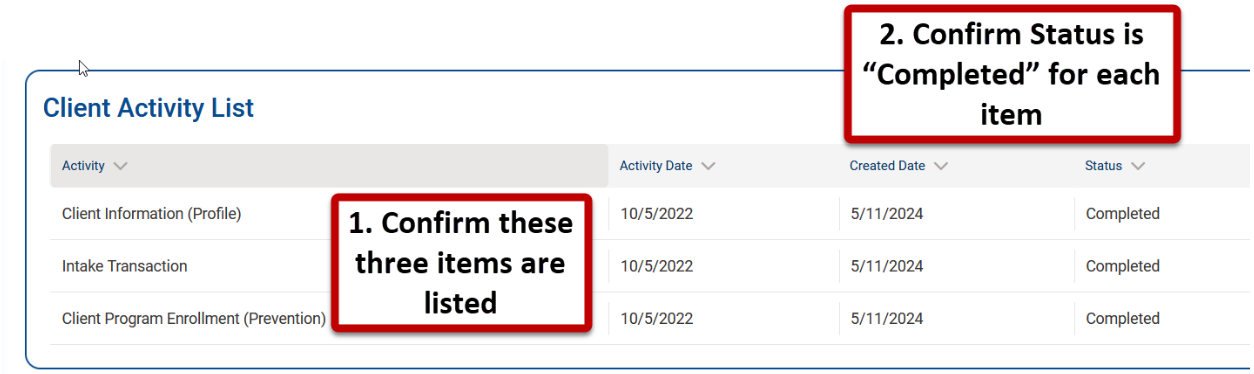


i. Complete the remaining required fields: **Intake Facility**, **Intake Staff**, **Case Status**, **Intake Date**, and **Selected Risk Categories**.

j. Click on **Save and Finish**.



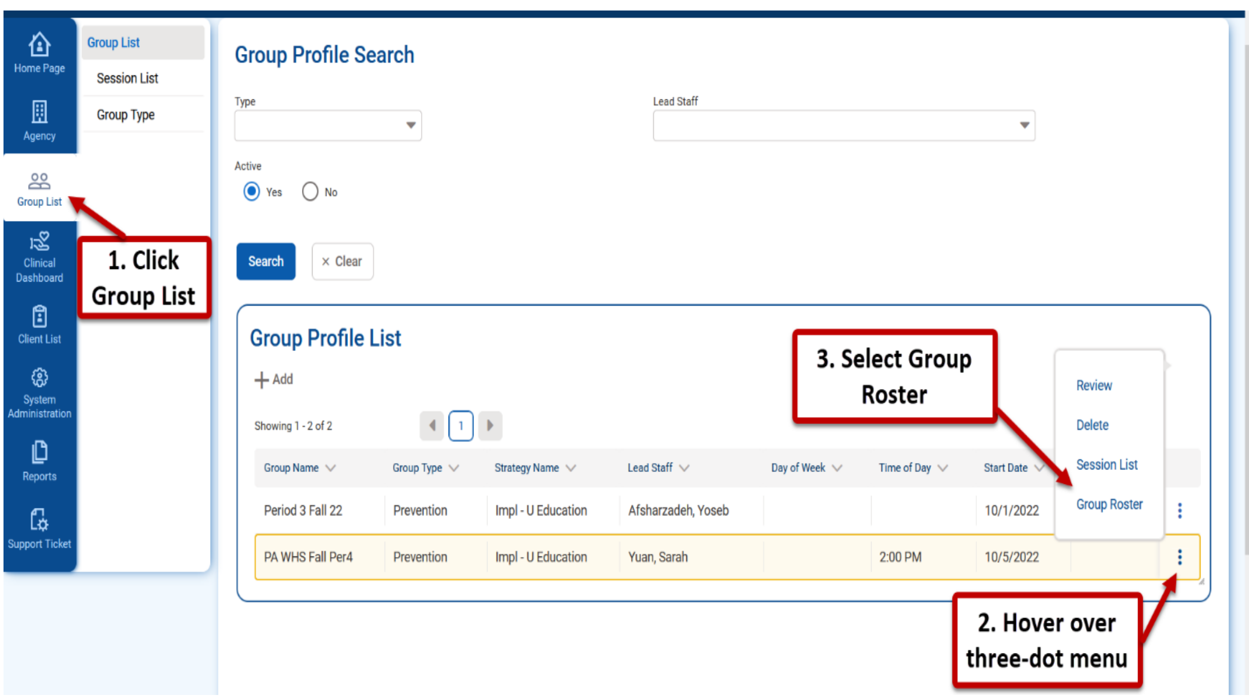
Note: This screen will automatically appear after clicking on Save and Finish in the previous step. Check the Client Activity List to confirm there are three items listed (1) showing Completed status (2).



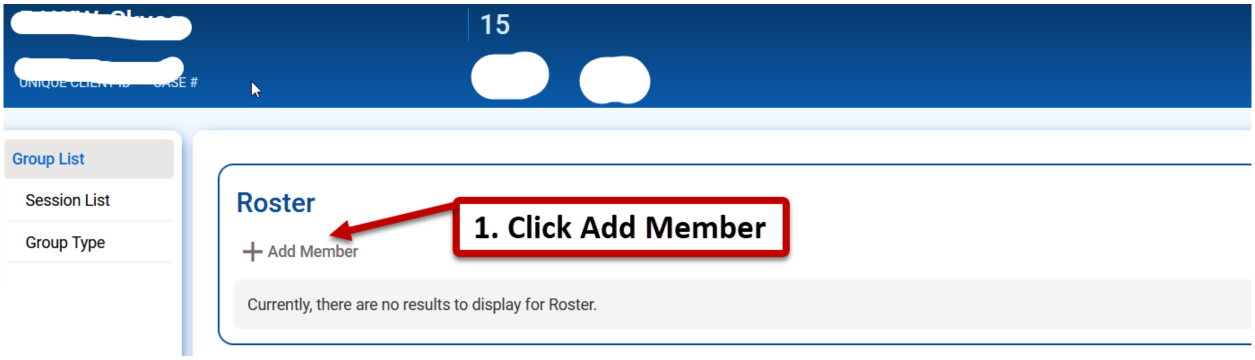
3. Adding Participants to a Group

To add participants to a group, select **Group List (1)** from the Left menu.

a. Hover over the **three-dot menu (2)**. Select **Group Roster (3)**.



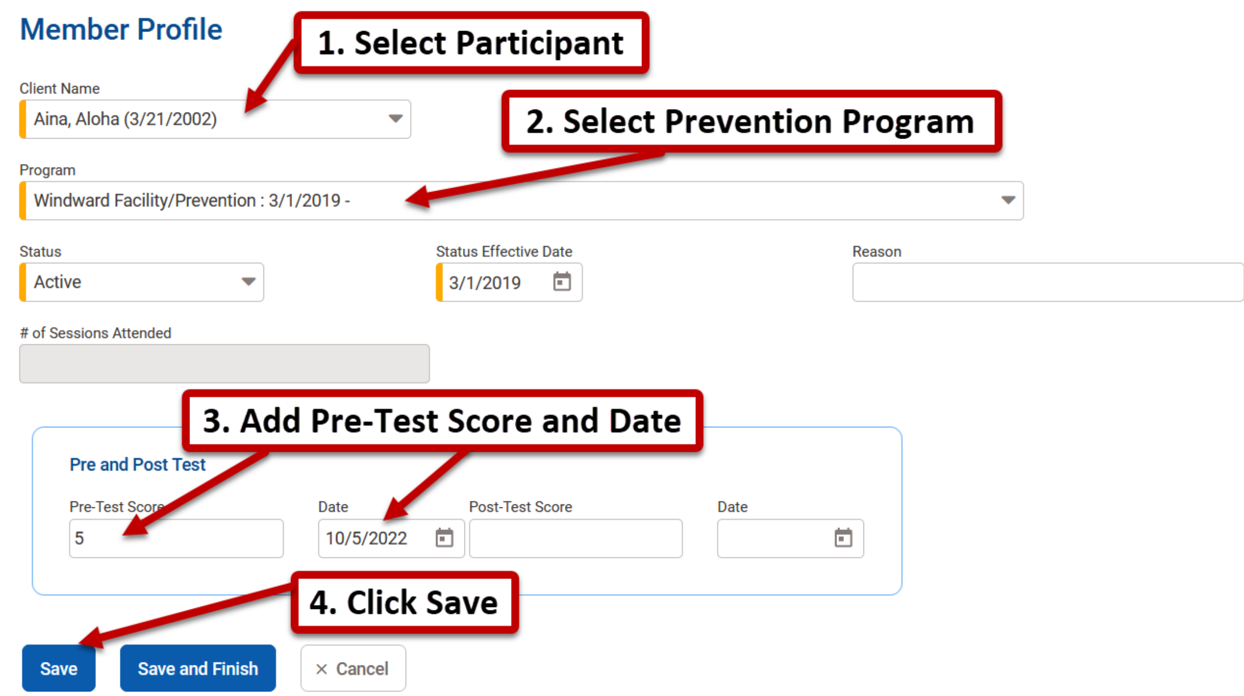
b. Add participants by clicking **Add Member (1)**.



c. To add participants to the roster, complete the required information: **Client Name (1)**, **Program (2)**, **Status**, **Status Effective Date**, **Pre-Test Score** and **Date (3)**.

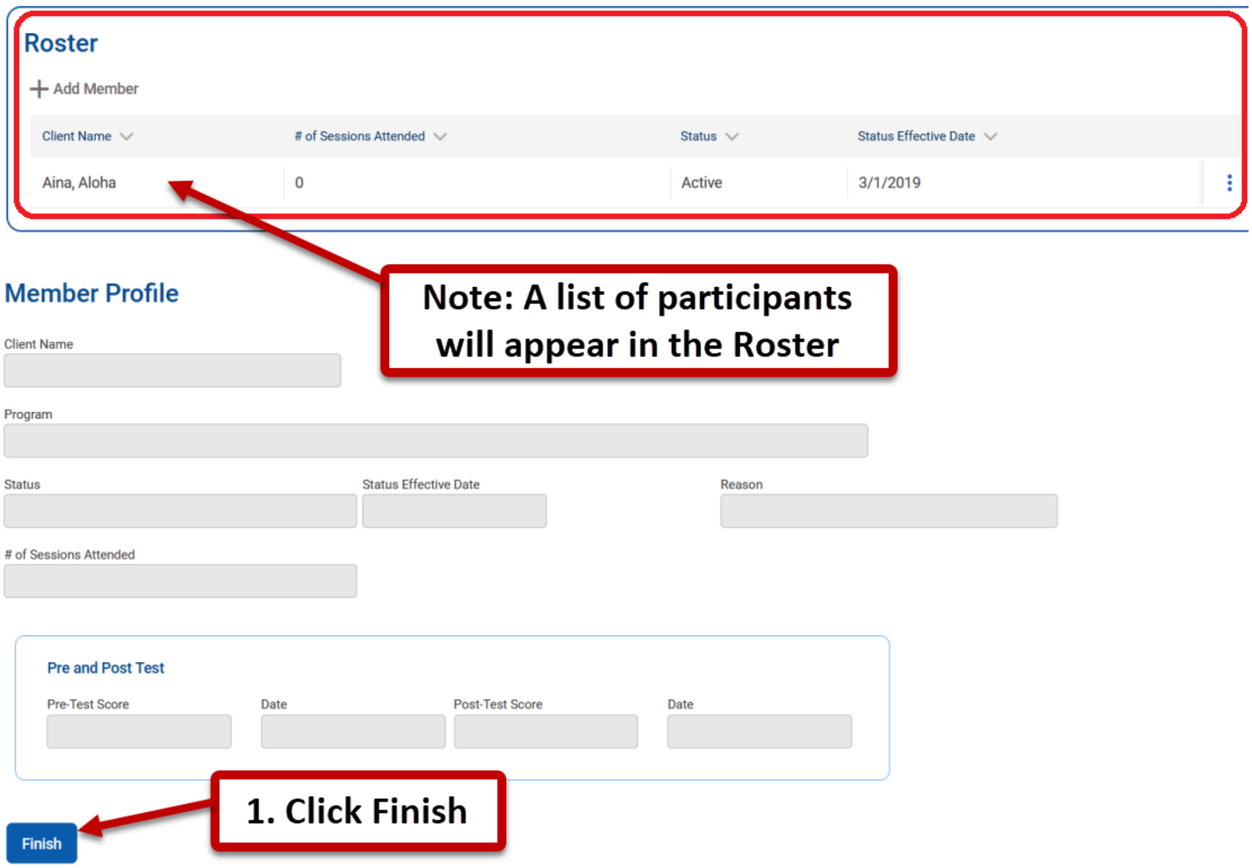
d. Click **Save (4)**.

Note: The Pretest Score and Date need to be entered by the participant's third session to continue marking them present.



e. (Repeat **Add Member** steps for each participant in the group. Click **Save and Finish (1)** upon completion.)

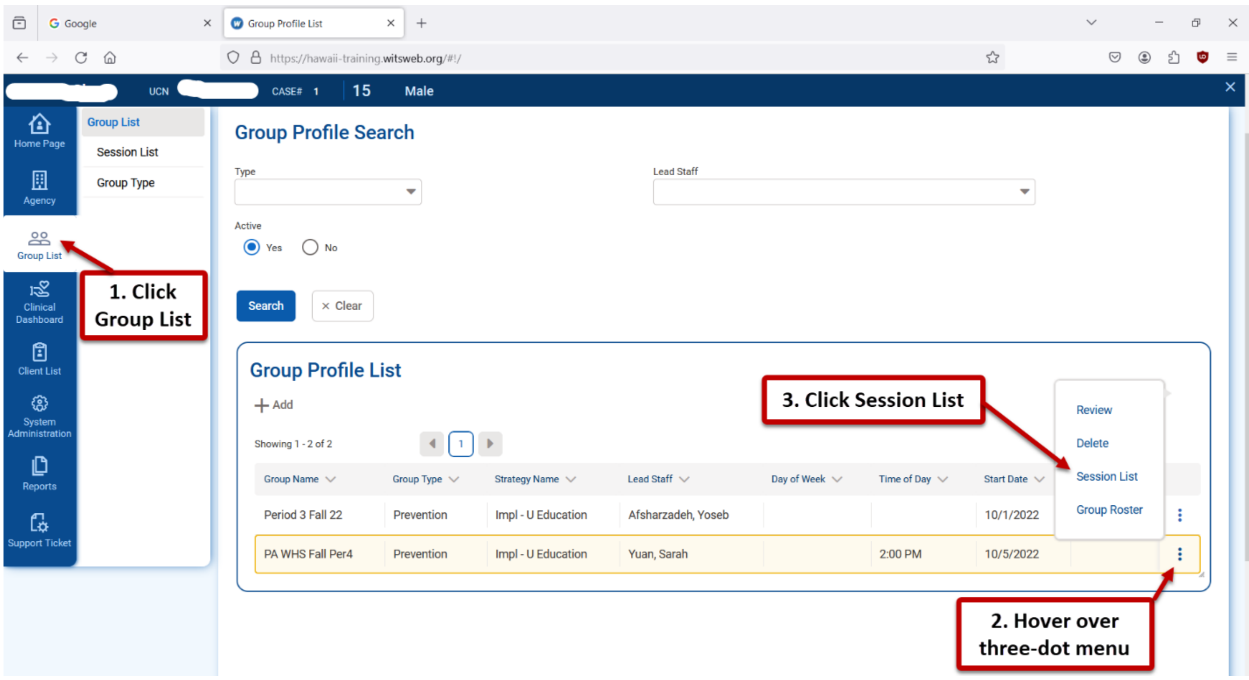
Note: A list of participants will appear in the Roster.



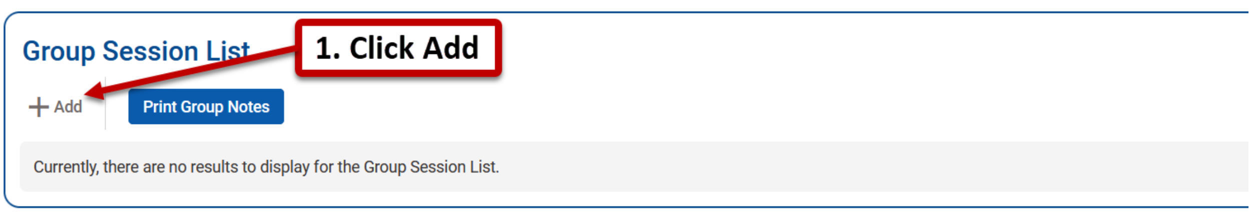
4. Entering Data for Individual-Based Activities.

To enter data, select **Group List (1)** from the Left Menu. Hover over the **three-dot menu (2)**.

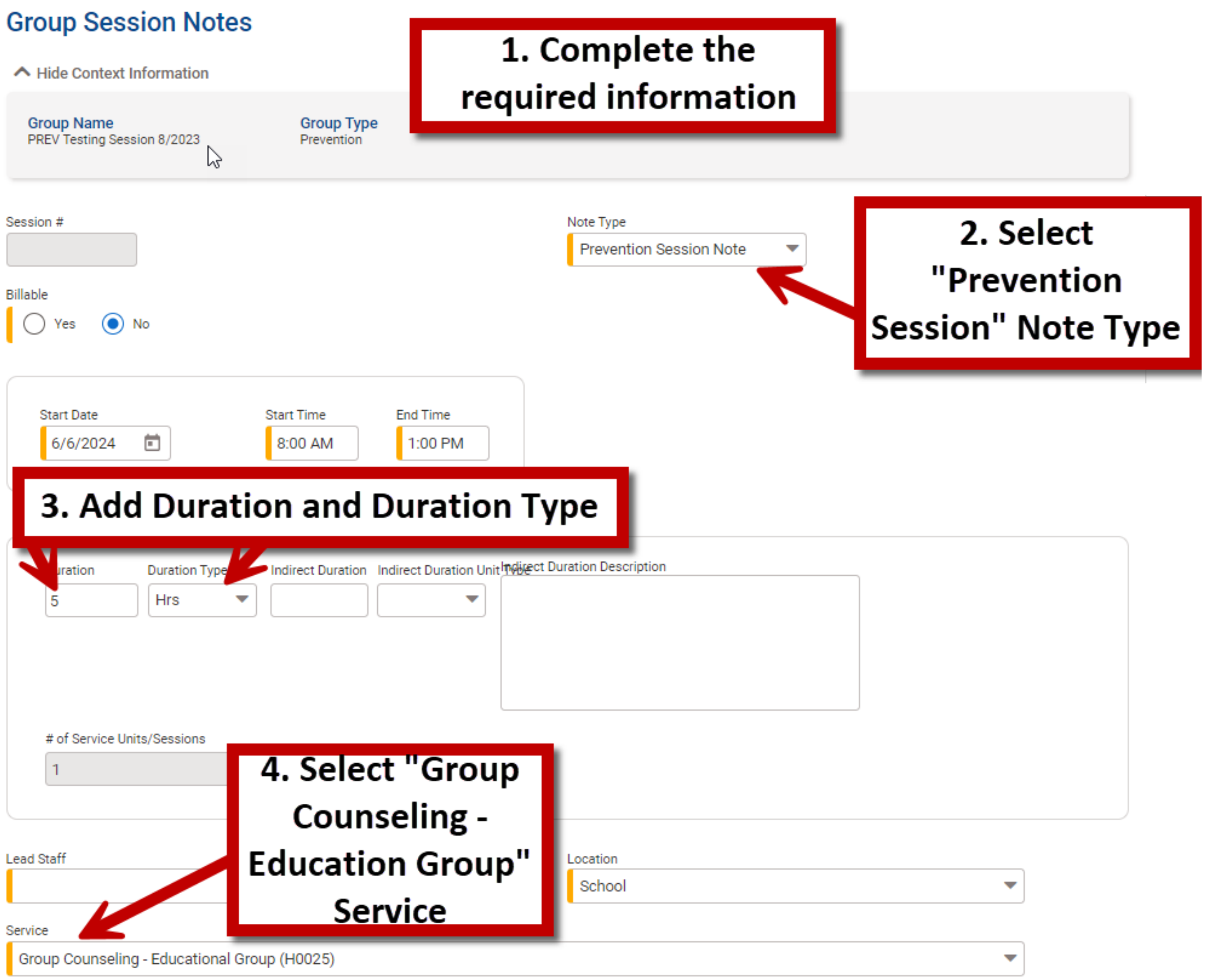
a. Click **Session List (3)**.



b. Click **Add (1)**.



c. For the Group Session Notes, **complete the required information (1)**: **Note Type (2)**, **Billable**, **Start Date**, **Start Time**, **End Time**, **Session Duration and Duration Type (3)**, **# of Service Units/Sessions**, **Lead Staff**, **Location**, **Service**, and **Selected Activity (6)**.

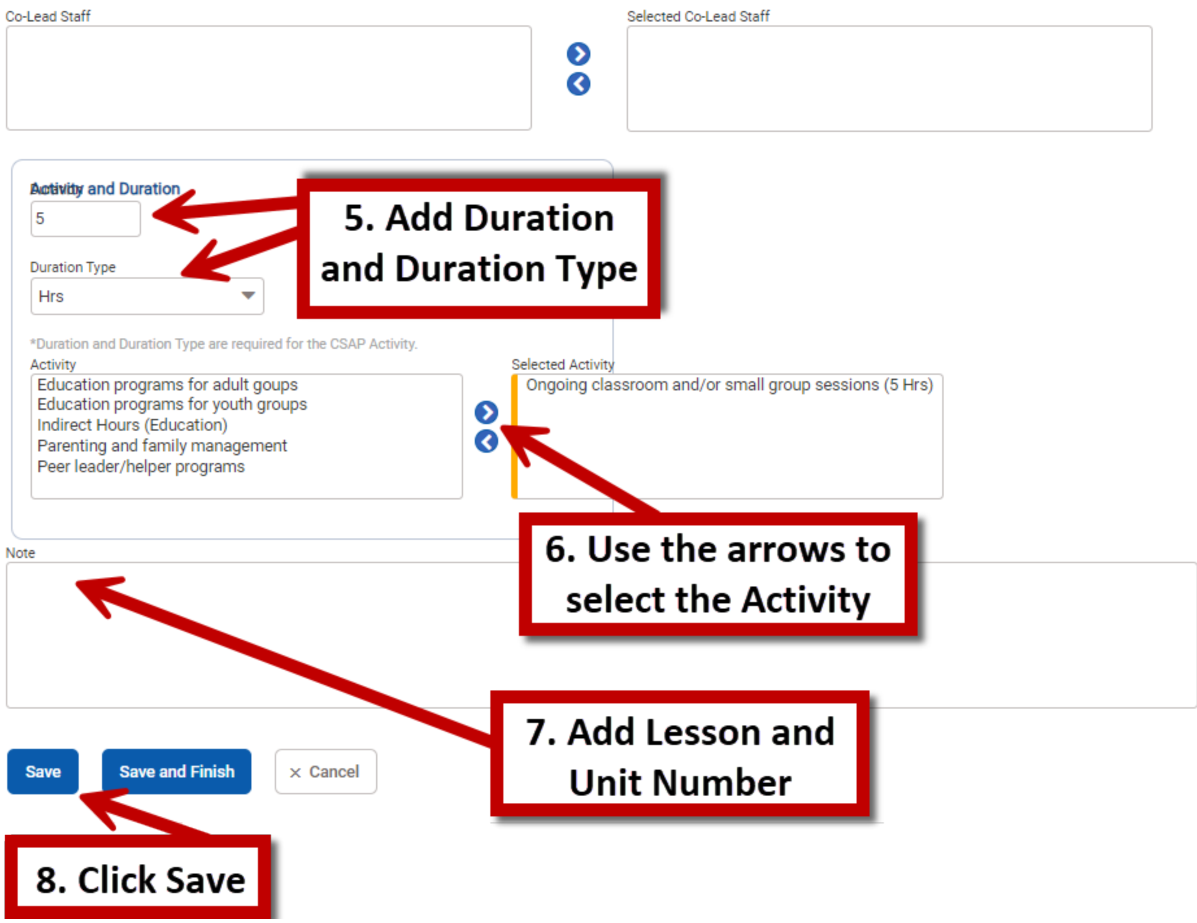


d. Add the **Activity Duration** and **Duration Type (5)**.

e. Use the arrows to select the **Activity/Selected Activity (6)**.

f. Enter you program's Lesson and Unit Number in the **Note field (7)**, as applicable.

g. Click **Save (8)**.



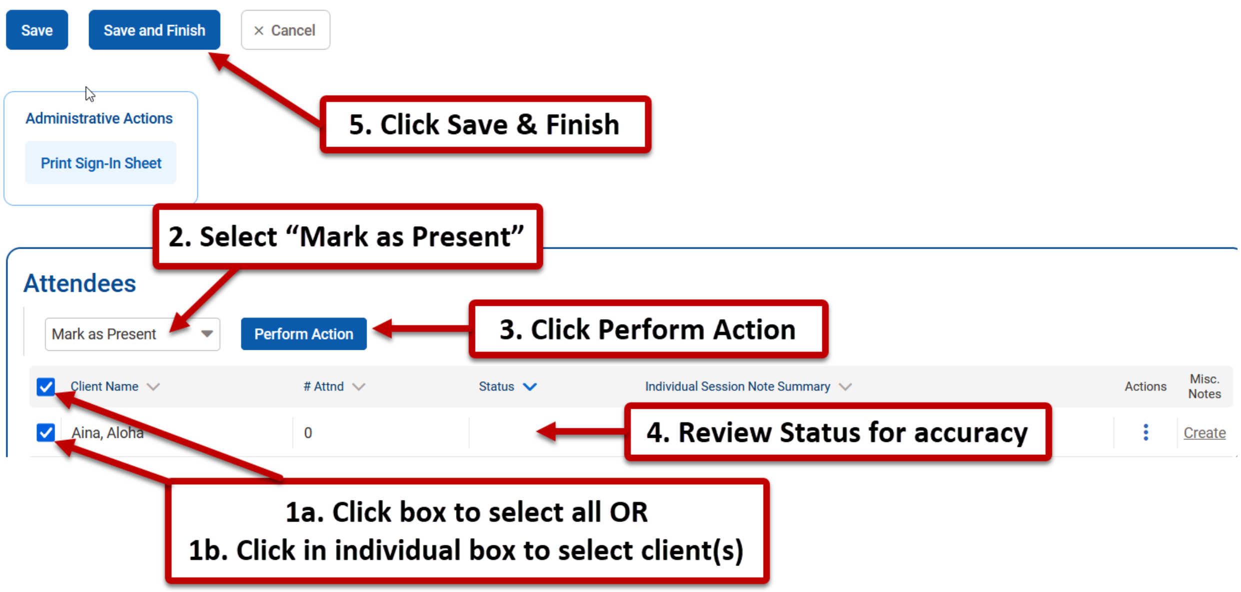
h. Next to Client Name, click the box to select **all Attendees (1a)**. To select an individual Attendee, click next to the **Attendee's name (1b)**.

i. Select the Attendee Status from the dropdown, **"Mark as Present" (2)**.

j. Click on **Perform Action (3)**.

k. Review and **verify the Attendee's Status is correct (4)**.

l. Click **Save and Finish (5)**.



If you have any question, please email **DOH.ADAD.WITSHELP@doh.hawaii.gov.**