

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**.

The screenshot shows the WITS system interface. On the left is a blue navigation menu with icons for Home Page, Agency, Group List, Clinical Dashboard, Client List, System Administration, Reports, and Support Ticket. The 'Group List' menu item is highlighted with a red box and an arrow pointing to it, with the text '1. Click Group List'. The main content area is titled 'Group Profile Search' and includes a 'Type' dropdown, a 'Lead Staff' input field, and 'Active' radio buttons for 'Yes' (selected) and 'No'. Below this is a 'Search' button and a 'Clear' button. The 'Group Profile List' section shows a table with two rows of data. An 'Add' button with a plus sign is located above the table, highlighted with a red box and an arrow, with the text '2. Click Add'. The table has columns for Group Name, Group Type, and Strategy Name. The first row shows 'Period 3 Fall 22', 'Prevention', and 'Impl - U Education'. The second row shows 'PA_WHS_Fall_Per4', 'Prevention', and 'Impl - U Education'. The table also includes pagination controls showing 'Showing 1 - 2 of 2' and a page number '1'.

- 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.

Group Profile

▼ Show Context Information

Group Name: PA WHS Fall Per4

Group Type: Prevention

Group Established On: 10/5/2022

End Date: [Red 'no' symbol]

Day of Week: [Dropdown]

Time of Day: [Empty field]

Lead Staff: [Empty field]

Room Location: [Empty field]

Facility: Test Facility

Plan: Prevention Test - Program

Planned Strategy: Impl - U Education

Geo Type: City/Town

City/Town: L06-Waianae Complex

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

Approximate Cost

Travel
\$

Material
\$

Space
\$

Labor
\$

Total
\$

Co-Lead
Afsh
Naka
White
Yuan,
unselor

Selected Co-Lead Staff

Description
Test

Domains

Selected Domains
Prevention

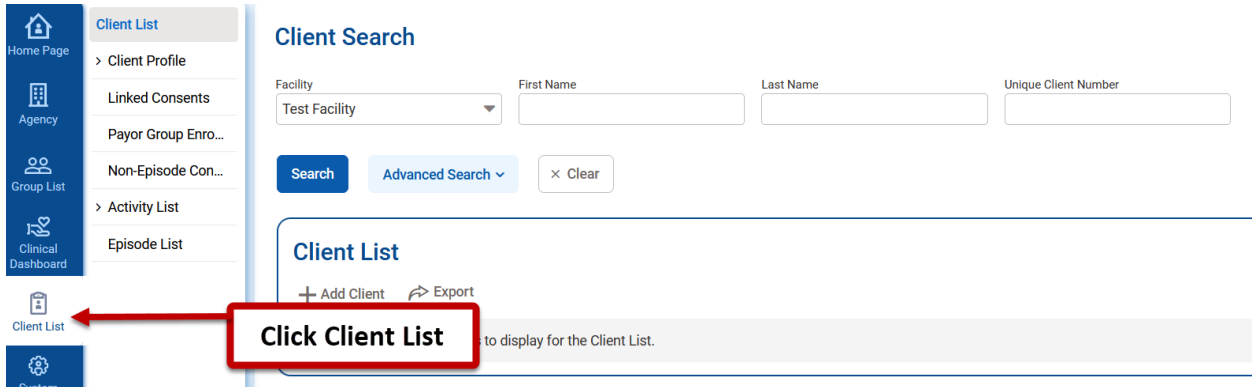
Add Description

Click Save

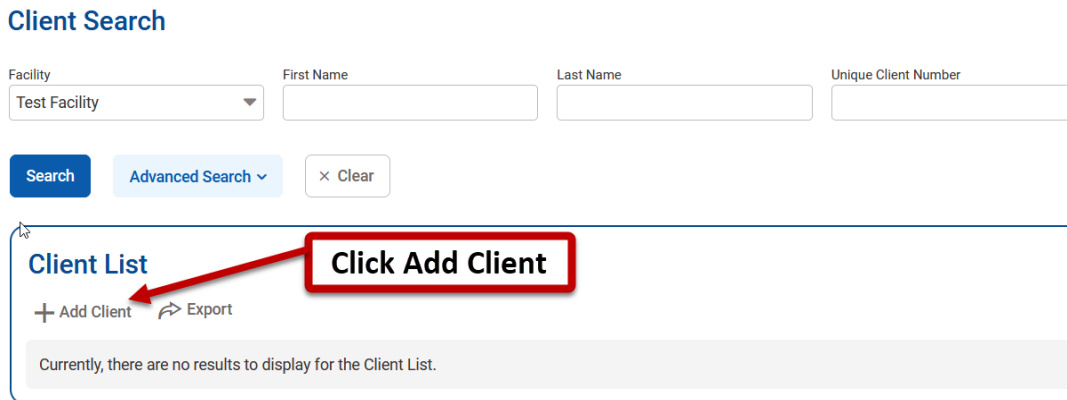
Save Save and Finish × Cancel

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.

Client Profile

[Show Context Information](#)

1. Complete the required fields (solid and striped orange bars).

First Name

Middle Name

Last Name

Mother's Maiden Name

Sex

Gender Identity

DOB

SSN

Driver's License

Access Category

Has paper file Yes No

Provider Client ID

Date of Death

Additional Information

Ethnicity/Hispanic Origin

Races

Selected Races

2. Add Provider Client ID

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

Primary/Preferred Race
23-Native Hawaiian

Detailed Ethnicities
10-Japanese
11-Okinawan
12-Chinese
13-Korean

Selected Detailed Ethnicities
16-Filipino
18-Hawaiian

Primary/Preferred Detailed Ethnicity
19-Mixed - Part Hawaiian

Religious Preference

English Fluency
Good

Preferred Language
English

Interpreter Needed
 Yes No

Military Dependent
 Yes No

Veteran Status
2-No

Citizenship
United States of America

Sexual Orientation

Upload Profile Image
No File Selected... Browse Upload

2. Click Save

< Back Next > Save Save and Finish × Cancel

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.

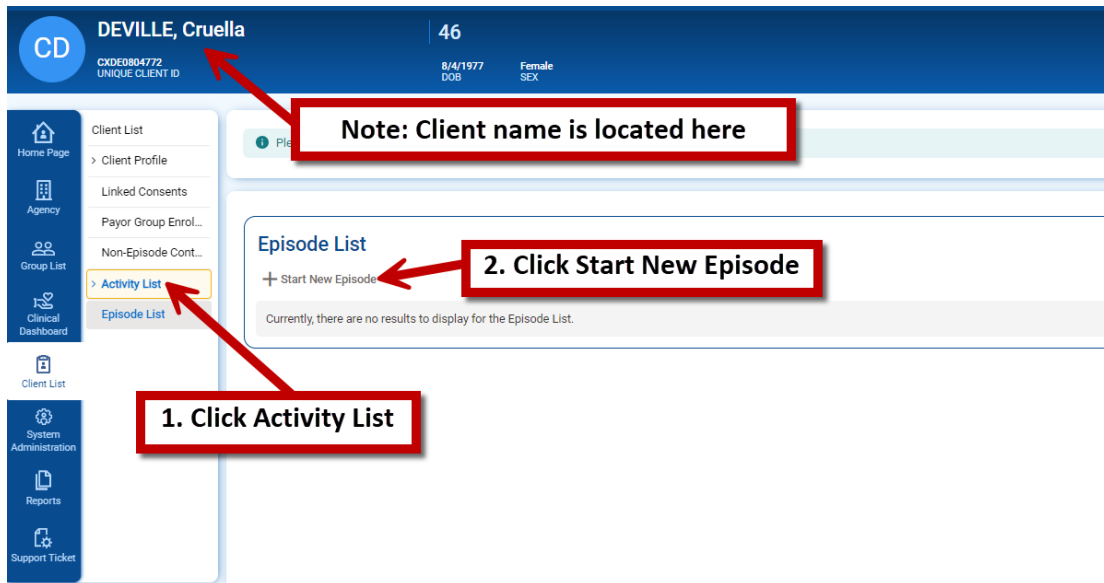
Similar Clients already exist in the System. Do you wish to continue inserting this client record? Click "Yes" to continue to Add the record or No to Cancel the creation of the new record.

Unique Client #	MPI	Full Name	DOB	SSN
ABCD1234567		Fake, Fake	3/7/2009	

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

- i* The filter you created has been applied to the client list.
- i* No results match your search criteria.

- 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.**

Intake Case Information

Hide Context Information

Case #
1

Created By	Created Date	Updated By	Updated Date
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1. Complete the remaining required fields

Intake Facility: [Dropdown]
Intake Staff: [Dropdown]
Case Status: Open Active [Dropdown]

Initial Contact: [Dropdown]
Initial Contact Date: [Calendar]
Intake Date: 5/28/2024 [Calendar]

Source of Referral: [Dropdown]
Referral Contact: [Dropdown]
[Add Collateral Contact](#)

Presenting Problem (In Client's Own Words)
[Text Area]

Note: Intake Date is the date the participant joined the group

Risk Categories: Abuse victims, Already using substances, Children of substance abusers, Drop-outs, Economically disadvantaged

Selected Risk Categories: None

Domains: [Empty]

Selected Domains: Prevention

Date Closed: [Text Field]

2. Click 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).

Activity	Activity Date	Created Date	Status
Client Information (Profile)	10/5/2022	5/11/2024	Completed
Intake Transaction	10/5/2022	5/11/2024	Completed
Client Program Enrollment (Prevention)	10/5/2022	5/11/2024	Completed

1. Confirm these three items are listed

2. Confirm Status is "Completed" for each item

3. Adding Participants to a Group

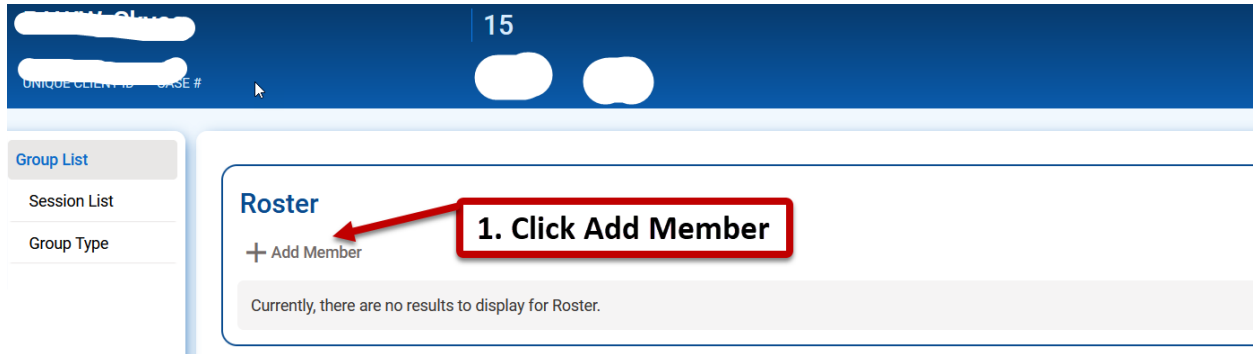
To add participants to a group, select **Group List (1)** from the Left menu.

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

The screenshot shows the 'Group Profile Search' and 'Group Profile List' sections. On the left, a navigation menu has 'Group List' highlighted with a red box and an arrow pointing to it, labeled '1. Click Group List'. The 'Group Profile List' table has two rows. The second row is highlighted in yellow. A red box labeled '2. Hover over three-dot menu' points to the three-dot menu icon on the right of this row. A second red box labeled '3. Select Group Roster' points to the 'Group Roster' option in the dropdown menu that appears.

Group Name	Group Type	Strategy Name	Lead Staff	Day of Week	Time of Day	Start Date
Period 3 Fall 22	Prevention	Impl - U Education	Afsharzadeh, Yoseb			10/1/2022
PA WHS Fall Per4	Prevention	Impl - U Education	Yuan, Sarah		2:00 PM	10/5/2022

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.

The screenshot shows a 'Member Profile' form. It has several fields: 'Client Name' (dropdown menu with 'Aina, Aloha (3/21/2002)'), 'Program' (dropdown menu with 'Windward Facility/Prevention : 3/1/2019 -'), 'Status' (dropdown menu with 'Active'), 'Status Effective Date' (calendar icon with '3/1/2019'), and 'Reason' (text input). Below these is a '# of Sessions Attended' field. A section titled 'Pre and Post Test' contains 'Pre-Test Score' (input with '5'), 'Date' (calendar icon with '10/5/2022'), 'Post-Test Score' (input), and 'Date' (calendar icon). At the bottom are three buttons: 'Save', 'Save and Finish', and 'Cancel'. Four red boxes with arrows point to these elements, labeled '1. Select Participant', '2. Select Prevention Program', '3. Add Pre-Test Score and Date', and '4. Click Save'.

- 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.

Client Name	# of Sessions Attended	Status	Status Effective Date
Aina, Aloha	0	Active	3/1/2019

Member Profile

Client Name

Program

Status Status Effective Date Reason

of Sessions Attended

Note: A list of participants will appear in the Roster

Pre and Post Test

Pre-Test Score <input type="text"/>	Date <input type="text"/>	Post-Test Score <input type="text"/>	Date <input type="text"/>
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1. Click Finish

Finish

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)**.

UCN CASE# 1 15 Male

Group Profile Search

Type Lead Staff

Active Yes No

Search

Group Profile List

+ Add

Showing 1 - 2 of 2

Group Name	Group Type	Strategy Name	Lead Staff	Day of Week	Time of Day	Start Date	
Period 3 Fall 22	Prevention	Impl - U Education	Afsharzadeh, Yoseb			10/1/2022	Review Delete Session List Group Roster
PA WHS Fall Per4	Prevention	Impl - U Education	Yuan, Sarah		2:00 PM	10/5/2022	Review Delete Session List Group Roster

1. Click Group List

2. Hover over three-dot menu

3. Click Session List

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

Group Session List

+ Add

1. Click Add

Currently, there are no results to display for the Group Session List.

- 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).

Group Session Notes

^ Hide Context Information

Group Name
PREV Testing Session 8/2023

Group Type
Prevention

1. Complete the required information

Session #

Note Type

Prevention Session Note

2. Select "Prevention Session" Note Type

Billable

Yes No

Start Date

6/6/2024

Start Time

8:00 AM

End Time

1:00 PM

3. Add Duration and Duration Type

Duration

5

Duration Type

Hrs

Indirect Duration

Indirect Duration Unit

Indirect Duration Description

of Service Units/Sessions

1

4. Select "Group Counseling - Education Group" Service

Lead Staff

Location

School

Service

Group Counseling - Educational Group (H0025)

- 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)**.

Co-Lead Staff

Selected Co-Lead Staff

5. Add Duration and Duration Type

Activity and Duration

5

Duration Type

Hrs

*Duration and Duration Type are required for the CSAP Activity.

Activity

- Education programs for adult groups
- Education programs for youth groups
- Indirect Hours (Education)
- Parenting and family management
- Peer leader/helper programs

Selected Activity

Ongoing classroom and/or small group sessions (5 Hrs)

6. Use the arrows to select the Activity

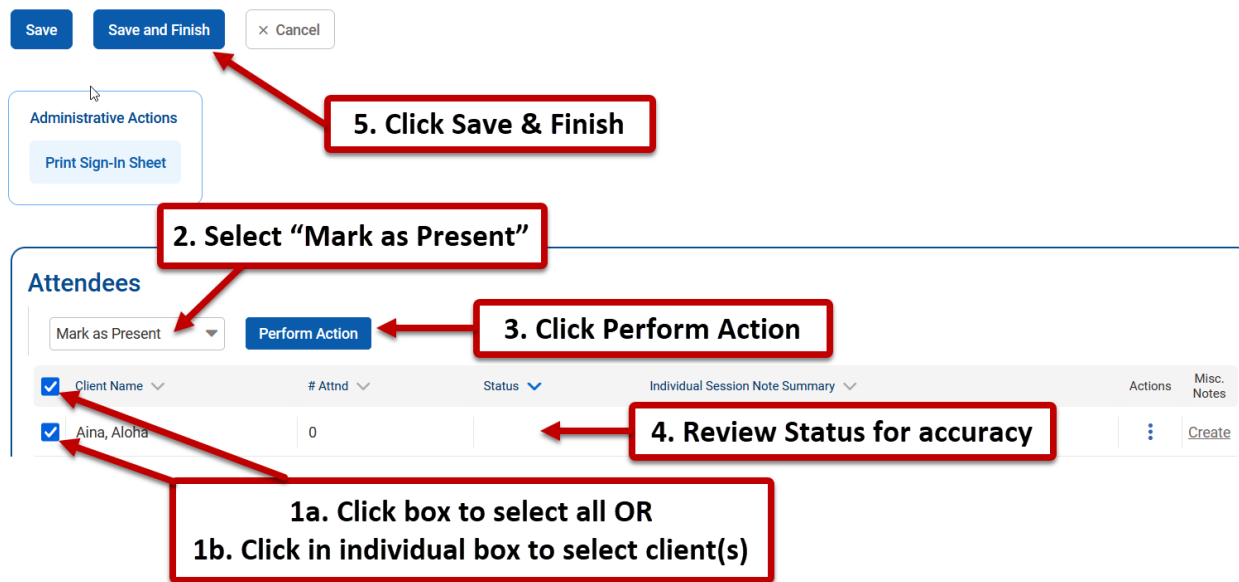
Note

7. Add Lesson and Unit Number

Save Save and Finish × Cancel

8. Click Save

- 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.