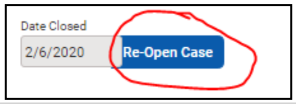
DMH-WITS Client Entry Process Outline

- Log into **WITS**
- Select Agency / Facility, select **Go**
- View Left **Navigation Menu**:
- Go to Client List
    - **Client Profile**, click **Add Client**
        - add **Client Profile** along with:
            - Additional Information screen
            - Address
            - ***(For DMH grant recipients only)*** **Client Group Enrollment** and select **Add Government Contract Enrollment.** *This section is required so the provider can release billable Encounters to the billing section of WITS for claim batch submissions to DMH. You may also do this step after the client's program enrollment and prior to adding the billable encounters.*
    - Go to **Activity List** or **Episode List** to start a new intake (episode of care).
        - **Intake** (Episode)
        - **Admission**
        - **Outcome Measure**
            - **Client Status –** complete all required fields on the Client Status page, select **Save**.
            - **ASAM**
                - For **Substance Use** related treatment, ASAM is Required. Complete the Client Status page of the Outcome Measures, and select the **Next** button to complete the **ASAM** section. Once the ASAM has been completed, select **Next** to complete the **Diagnosis** section of the Outcome Measures.
                - For **Mental Health** related treatment, the ASAM portion is not required. Therefore, you after saving the Client Status page of the Outcome Measure, select the **Diagnosis** section of the Outcome Measures from the Activity List. You will then be taken directly to the Diagnosis page for editing/completion.
            - **Diagnosis**
                - Select **Edit Client Diagnosis**
                - Select the behavioral type, search the diagnosis by the ICD-10 code if available, or search by adding a brief description of the diagnosis.
                - Principal Diagnosis should be **Yes**, then click **Save**.
                - Repeat these steps for additional diagnoses. Once completed, select **Finish** at the bottom of the screen.
                - You'll be taken back to the main Client Diagnosis page. Select **Save and Finish** to return to the **Outcome Measures List** which should have a status of *Completed***.**
        - **Program Enrollment**
            - ***(SOR3/SOR4 grant recipients only)*** GPRA (**NOTE**: *The **GPRA** option will appear in the client's Activity List once a client is enrolled into either a **SOR3** or **SOR4** program*). Add GPRA **Intake** interview.
        - Assessments >> **Functional Assessments** (if applicable, click on **Create New Functional Assessment** to enter DLA-20, DLA-20 AD, CANS, CAFAS, or PSC-35).
            - Select the Assessment Type and the Completed Date. The Client Program Enrollment will automatically populate. If client is enrolled into multiple programs, you may click on the drop-down to select the relevant program. Click **Save.**

- Add the Necessitating Event Date, Reason, and Score (if applicable). Complete all required fields, and then select **Save.**

- **Encounters** (used to report all services rendered to a client)
  - Click **Add Encounter**
  - Select a Note Type (i.e., Progress Note) and complete all required fields.
    - **NOTE: If the encounter IS NOT billable towards a grant,**
      - you must select Billable **– No**
      - You may then click **Save and Finish**, or **Save,** and select **Finalize** in the Administrative Actions box. Finalizing an Encounter will lock the record and grey-out the screen. However, Encounters may be reopened if needed to make edits.
    - **NOTE: If the encounter IS billable towards a grant,**
      - you must select Billable **– Yes**
      - You may then click **Save**, and then click **Next.**
      - Add a note and select **Sign Note**.
      - In the **Administrative Actions** box, select **Release to Billing.**
      - Select the **Client Group Enrollment** option, and then click **Save and Finish (*NOTE*:** *If the Client Group Enrollment drop-down menu is blank, select **Cancel,** to return to the Encounter screen. **Save** the encounter and refer to the **Client Profile** section for instructions for how to add a Client Group Enrollment – Government Contract Enrollment. Once the Client Group Enrollment has been added/saved, you may return to the Encounter and proceed to release the encounter to billing).*
        - *NOTE: For instructions regarding how to bill claims to DMH under Agency>Billing, please refer to the **MS-WITS Agency Billing document**. This section would be for any staff that handle fiscal billing for the agency.*
- **Discharge / closing out the case** – before discharging and closing a case, you must first follow the below steps:
  - Assure that all services rendered to the client have been reported in the Encounters Section
  - Add an updated Outcome Measure (when adding the new OM, be sure to update the date and make any additional changes that may have occurred before saving).
  - ***(For SOR3/SOR4 grant recipients only)*** Add the client's **GPRA-Discharge** Interview. At the 5–8-month window, the client's **6-Month Follow-up GPRA** may be completed.
  - Disenroll the client from the program(s).
    - Go to the client's Activity List to review the previously entered program enrollment.
    - Add the end date, date of last contact, and termination reason before saving.
  - Go to the **Discharge** section of the client's Activity List to complete the discharge screen.
    - When you select **Save and Finish**, you will be asked if you'd like to also close out the case. You may select **Yes** to close out the case completely.

- NOTE: *If you realize that updates need to be made <u>after</u> the case was closed, the case can be reopened by going to the client's* ***Intake Case Information*** *to reopen the case at the bottom of the screen.*



- *Once edits have been made, you may close the case by going back to the* ***Intake Case Information*** *and adding a case closure date. You may then click on the Save and Close Case link.*