

## **WITS – Screening, Brief Intervention, and Referral to Treatment (SBIRT)**

## **User Guide and Manual Iowa SBIRT**

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## 1. The WITS SBIRT User Interface

### WITS Usability

WITS is a sophisticated system that has been designed to accommodate many types of users and staff. In fact, WITS can be customized by any system administrator to create staff accounts with user specific access and permissions. This translates into a personalized WITS interface whereby the end-user will only have access to the modules, screens and functions which have been assigned to them.

As a result of the personalized user interface, end-users will not be distracted by additional screens, modules or functionality which often can reduce productivity and can make a user interface less friendly.

### Interface Features

To get the maximum use out of the WITS system, the user should be aware of the following interface features and navigation, including:

**Top Navigation Bar:** This area located at the top of the WITS screen and contains information that helps the user know his/her current context in the system. The information includes: **User** (the person currently logged in the system), and **Location** (the Agency and Facility) currently selected.

**Section Headers:** WITS often contains screens which are comprised of several sections. Therefore, to make it easy to navigate the page, section headers have been provided for clear identification.

**Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. It is also the area which will display system and client information, as well as allow you to enter data.

**Left Navigation:** WITS has been designed to follow common behavioral health treatment and recovery service workflows. As a result, when using the left navigation, you will immediately note that most of the modules and screens have been logically organized in a manner which makes sense to clinical staff, case managers and administrators.

**WITS I-SMART Training**  
User: Schnoor, Kory | Location: SBIRT Agency, SBIRT Agency | Logout | Snapshot

There is currently 1 support ticket

**Home**

**Announcements**

Actions	Summary	Start Date	Priority

**Alert List** Search in Agency

Actions	Alert Type	Client	Message	Facility	Date Due

**Schedule for:** Start Date: 8/6/2014 End Date: Refresh Search Calendar Edit/Add Schedule

Actions	Start	End	Summary	Status

Client Search

Agency

Substance Abuse Services Center (SAS)

First Name

SSN

I-SMART Training Client Id

Unique Client Number

Provider Client ID

Treatment Staff

Function Links:

If the screen you are in allows you to perform certain functions, such as adding a client, reviewing data, exporting data etc., the functions will usually appear in the section headers as white underlined links.

Input Fields/Selection Boxes:

The main content area is the location where the user will enter data into fields, selection boxes, drop-down lists etc. Keep in mind that some fields may be required by your WITS application and will be indicated as such by a Dark Yellow color.

Lists:

When arriving at a screen, users will most likely first see data and information presented as lists. These lists will display available information in columns of different data types which will correspond to the Client, Agency, Facility, Staff, etc., currently selected. In addition, some lists may have an "Action" column offering functions which can be applied to a selection from the list.

Action Buttons:

As you enter data and navigate between screens, you will be given various options such as Save, Clear, Cancel, Go, and Finish, all indicated by easy to view buttons.

Client List (Export)

Add Client

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	0105212222	Abuse, Substance	5/21/1990	***-**-2224	Female
	8402156666	Anne, Jo	2/15/1984	***-**-6666	Female

First Name

Substance

Middle Name

Last Name

Abuse

Gender

Female

DOB

5/21/1990

SSN

\*\*\*-\*\*-2224

Provider Client ID

Unique Client Number

0105212222

Drop-down box:

A drop-down box is used when only one entry may be selected from a list of values.

Textbox:

Text boxes are designed to allow the user to enter data in manually. Some text fields have specific formats which must be used: DOB/Date: mm/dd/yyyy; SSN: nnn-nn-nnnn or nnnn; Phone Number: nnn-nnn-nnnn

Mover Box:

A mover box is used when more than one entry may be selected from a list of values. Some may scroll.

Ethnicity

0-Not Spanish/Hispanic/Latino

Races

2-Black/African American

3-American Indian

4-Asian

5-Hawaiian or Pacific Islander

6-Alaskan Native

Selected Races

1-Caucasian

17.0.0

**WITS I-SMART Training**

User: Schnoor, Kory | Location: SBIRT Agency, SBIRT Agency

Generate Report | Snapshot

Client: client1\_test | 7708078542 | Clear Client

Always Logout before closing the window. Logout

You may clear the client context.

You may take a snapshot of the current screen.

Client Record: The client name and Unique Client Number (UCN) will appear when you're within a client record.

Home Page

Agency

Client List

Client Profile

Alternate Names

Contact Info

Collateral Contacts

Other Numbers

History

Allergies

Profile

Gender: Male

DOB: 8/7/1977

SSN: 8542

Provider Client ID

Unique Client Number: 7708078542

















State Client ID

Record Created By: Schnoor, Kory

Last Updated By: Schnoor, Kory

Created Date: 7/12/2013 11:31 AM

Last Updated Date: 7/12/2013 11:31 AM

Action Buttons		Data Fields		System Icons	
	cancels the current action and returns you to the previous page		<b>Mandatory field:</b> MUST have data in order to save record		<b>Error:</b> WITS will not allow you to move forward until you have addressed the error stated.
	saves data entered and remains on the current page		<b>Read only:</b> system generated field, for display only and cannot be edited		<b>Warning:</b> data has been entered which falls outside of a certain parameter. The record can be updated but you have been warned
	saves data entered and returns you to the section start page		<b>Discretionary field:</b> will not affect completion or saving of record		<b>Informational Message:</b> Informs users that something has occurred, such as a referral to their agency, or that an informational email has been sent.
	navigate through the pages in each section		<b>Required missing field:</b> enter data before trying to Save or Finish		
	clears all criteria from the search tools when present		<b>Required for State Reporting:</b> record may be saved but will not be complete		
	run the search tool using the criteria entered				
	clicking on a column heading will reorganize the table alphanumerically from 1-Z and then Z-1				
	move data from one choice box to another				

## 2. Logging into WITS

**START:** If this is your first time logging in, be sure to have your temporary Password and Pin sent to your email by your system administrator.

1. Open your browser application and in the URL field enter the WITS web address that you wish to access.
2. A new screen will appear with the name of your WITS system. Continue and enter in your user name and password and click on the **Go** button.
3. Notice that the screen will refresh and should now display a new field for a PIN. Continue and enter your PIN into the field. (Note: if this is your first time logging in, you will be asked to provide a new password and pin).
4. If this is your first time logging in, you will be prompted to enter a security question. This question can be used to help reset your password and pin in the event you forget it later.
5. When finished, click on the **Go** button.

The screenshot shows the WITS I-SMART Training login interface. At the top, there's a blue header with the WITS logo, the text 'I-SMART Training', and 'Version: 17.0.0'. Below the header, the word 'Login' is displayed. The main area contains two input fields: 'User ID' and 'Password'. To the right of the 'Password' field is a blue 'Go' button and a link that says 'Forgot your Password/PIN?'. At the bottom of the page, it says 'Web Infrastructure for Treatment Services' on the left and 'Powered by WITS' with the WITS logo on the right.

**FINISH:** You have now logged into WITS.

**Tip:** If this is your first time logging in or if your credentials (i.e. password and pin) are expired, the system will show another screen to allow you to enter a new Password and Pin. Be sure to pick a Password and Pin that you can memorize and which is secure. As part of the system's security features, you may be asked to reset your Password and Pin every few months. Also, if you enter in a wrong Password and/or Pin multiple times, your account may be disabled. Contact your system administrator if this occurs.

### 3. Changing Facilities

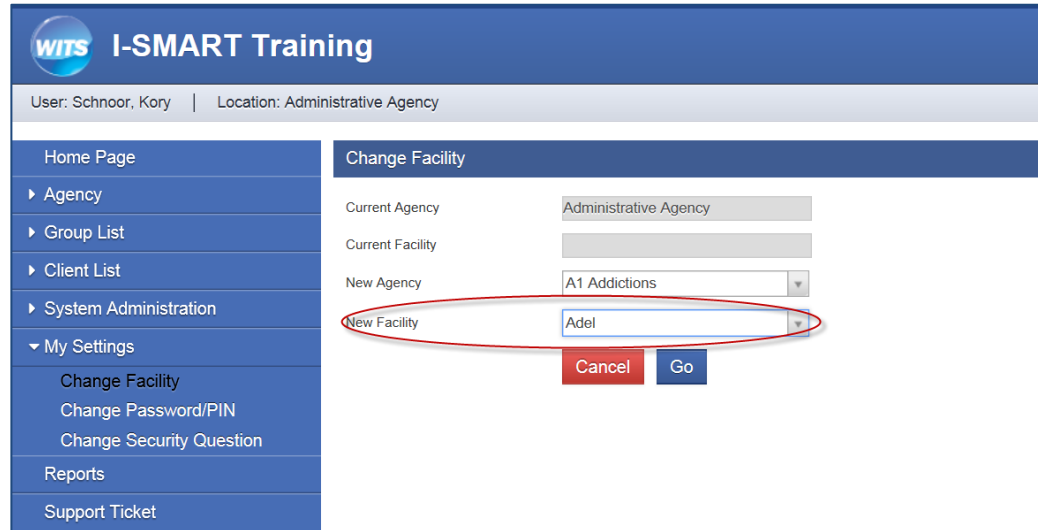
#### My Settings

**START:** You will need to use the Change Facility screen anytime you need to change the agency/facility you are currently logged into, or anytime you log into the system as an administrator or staff member who has been assigned to multiple agencies/facilities.

1. Whenever you need to change agency/facilities (or at log in), you will either click on the current agency/facility name on the Top Navigation Bar, or click on **Change Facility** under the **My Settings** menu item.
2. In the Change Facility screen, you will be able to select from Agencies and/or Facilities which you have been assigned to. Make your selection and when finished click on the **Go** button.
3. Check the top of your screen to make sure that “Location” is displaying the desired location you have selected.

**NOTE:** Many users may be assigned to only one facility, so will never see this screen.

**FINISH:** You have now changed your agency/facility context.



**I-SMART Training**

User: Schnoor, Kory | Location: Administrative Agency

**Change Facility**

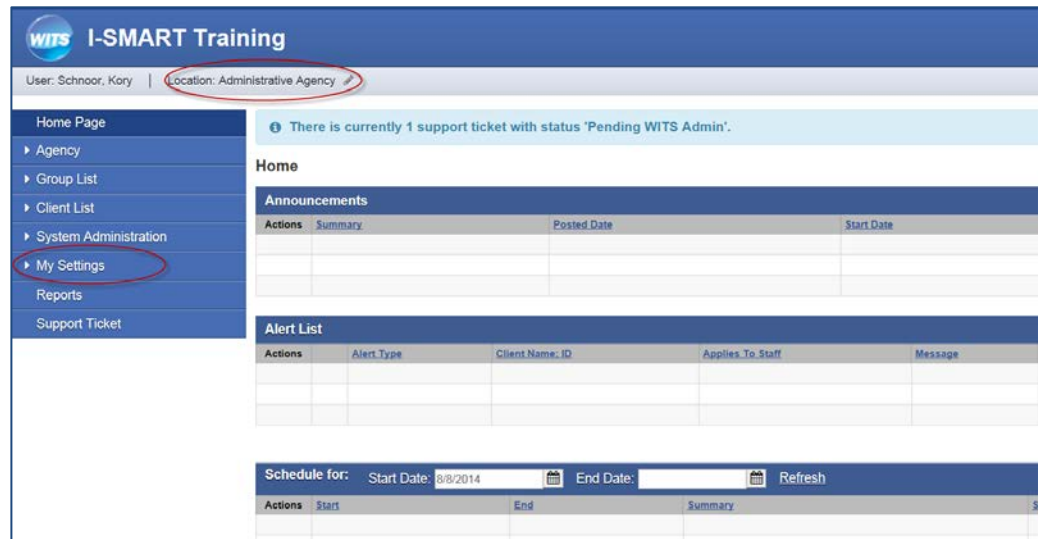
Current Agency: Administrative Agency

Current Facility:

New Agency: A1 Additions

New Facility: Adel

Cancel Go



**I-SMART Training**

User: Schnoor, Kory | Location: Administrative Agency

There is currently 1 support ticket with status 'Pending WITS Admin'.

**Home**

**Announcements**

Actions	Summary	Posted Date	Start Date

**Alert List**

Actions	Alert Type	Client Name, ID	Applies To Staff	Message

**Schedule for:** Start Date: 8/8/2014 End Date: Refresh

Actions	Start	End	Summary	\$

## 4. Creating Client Profiles

### Client List

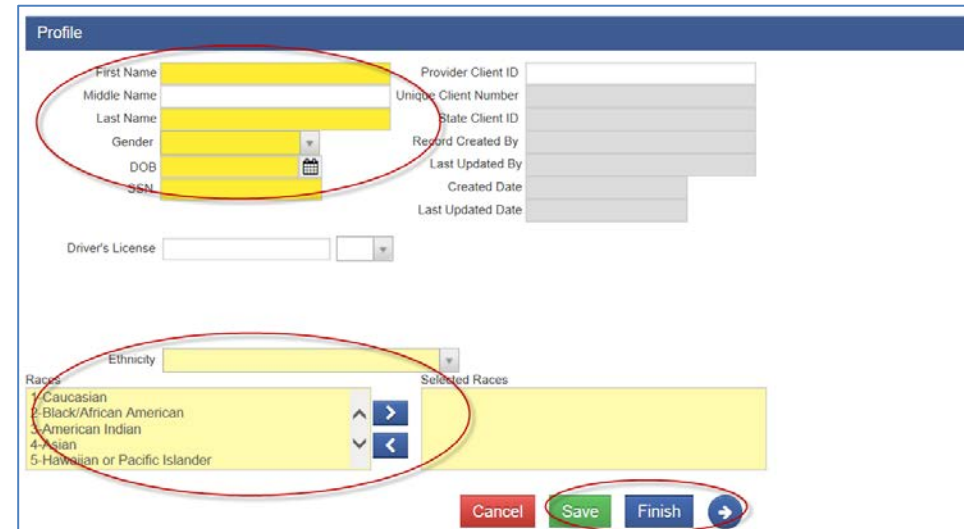
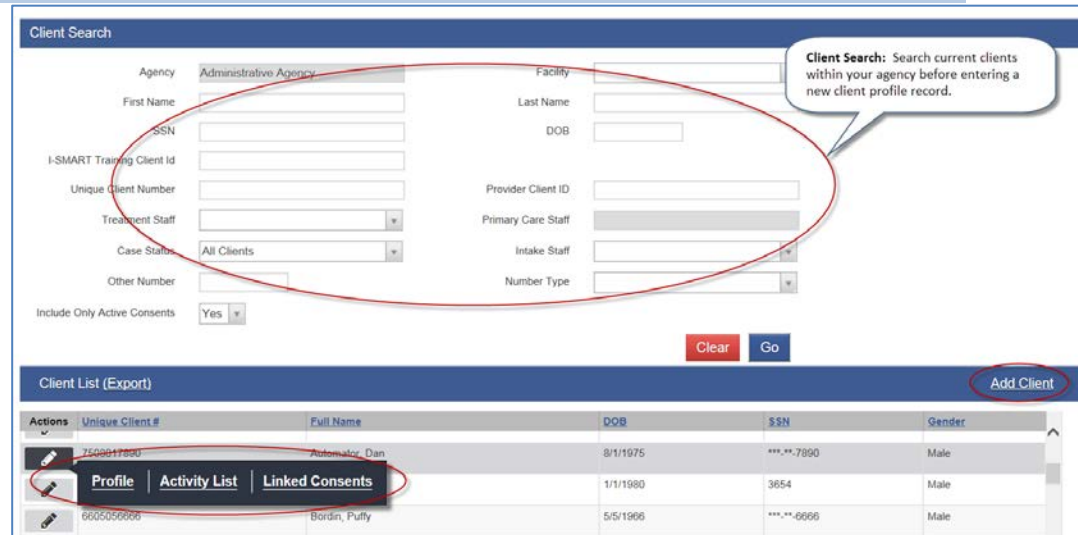
To search for a client, click on the **Client List** link in the left navigation menu. A blank Client List screen will appear. WITS will search on any fields you fill in, once you click **Go**. The more fields you enter the fewer records the system will return. Try to use unique information, such as birthdates or social security numbers, if possible. You can also enter a partial name (or other field) followed by a “\*”. This is called a wild card search. For instance, if you search for Last Name of “Smit\*”, you will get people with the last name of “Smith”, “Smitty”, “Smithson”, etc.

Look for your client in the Client List. If you find the right person, pull up the profile by clicking on **Profile** next to their name. If you don’t find your client, you can create a new one.

**START:** To add a client, make sure that you are in the client list screen by clicking on the **Client List** link in the left-hand navigation menu.

1. From the “Client List” screen, click on the **Add Client** link. The client profile screen will then appear.
2. In the “Client Profile” screen, enter in the client information including “First Name”, “Last Name”, “Gender”, “DOB”, “SSN”, “Ethnicity”, and “Races.”
3. **Note:** you may enter a full SSN, or the last four digits of the SSN.
4. To complete your entry, click **Finish** and the client record will be created. This action will then take you to the Episode List screen where you will create an Intake for the client.

**FINISH:** You have now completed a Client Profile. You do not need to create the client in the future.



**Tip:** The unique Client ID is created based on the client name, gender, DOB and SSN. It is important that the client information is entered properly the first time, as this will help to avoid duplicate entry of clients in the future.

**Note:** The History sub-menu displays a list of all changes that have been made to the client information as well as any access to this client’s record. It lists the date, the staff person, and a description of the access or change.



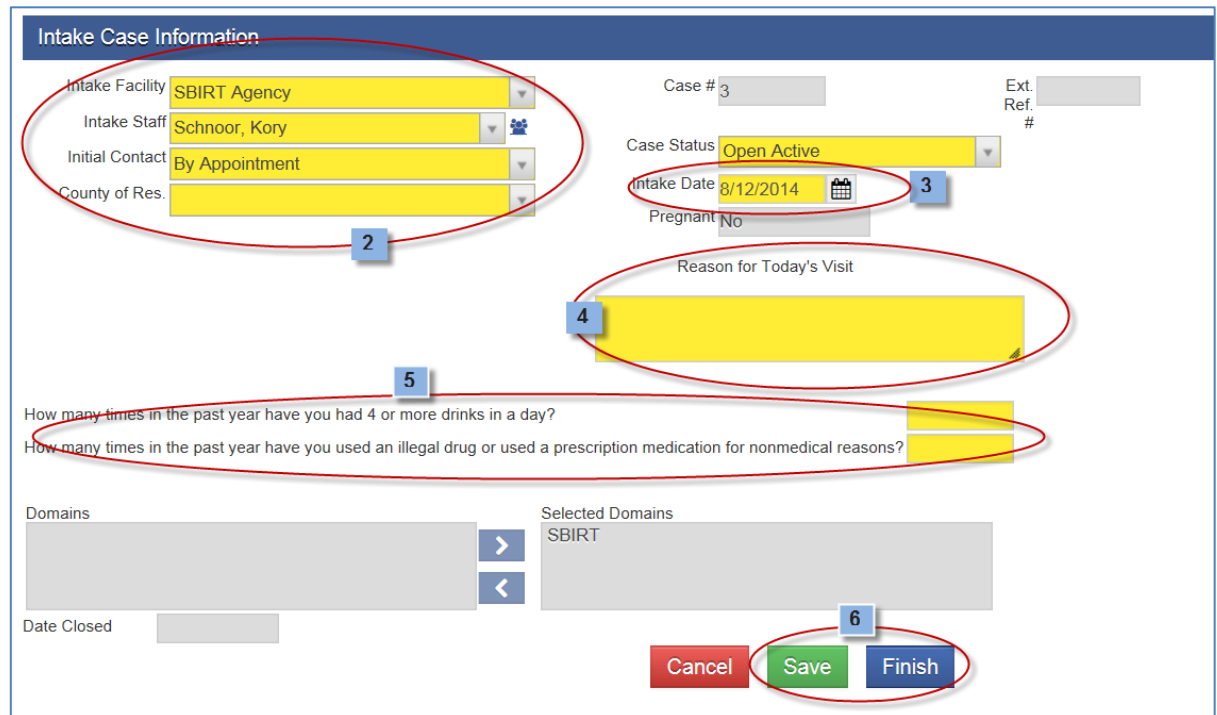
## 5. Creating Intakes

 **Client List > Activity List > Episode**

**START:** To begin, be sure that you have selected a client, since everything you do in the Intake will be applied to the client record chosen. Clicking **Finish** on the client profile will bring you directly to the Intake screen. Or, you may click on the **Activity List** menu item. Only one Intake per group of screenings, brief intervention or brief treatment sessions is required.

1. Click on **Start New Episode**, and the Intake screen will appear.
2. Continue and select a facility from the “Intake Facility” drop down list, a staff from the “Intake Staff” list, and the “Residence.”
3. Enter the Intake date. This will automatically populate with today’s date, but may be changed by the user.
4. Complete the “Reason for Today’s Visit” text box.
5. Enter the client responses for the pre-screening questions related to alcohol and drug use.
6. When complete, click on the **Finish** or **Save** buttons.

**FINISH:** You have now completed an Intake.



The screenshot displays the 'Intake Case Information' form. It includes fields for Intake Facility (SBIRT Agency), Intake Staff (Schnoor, Kory), Initial Contact (By Appointment), and County of Res. (a dropdown menu). To the right, there are fields for Case # (3), Ext. Ref. #, Case Status (Open Active), Intake Date (8/12/2014), and Pregnant (No). A large text area for 'Reason for Today's Visit' is present. Below this are two screening questions: 'How many times in the past year have you had 4 or more drinks in a day?' and 'How many times in the past year have you used an illegal drug or used a prescription medication for nonmedical reasons?'. At the bottom, there are 'Domains' and 'Selected Domains' (SBIRT) sections, a 'Date Closed' field, and three buttons: 'Cancel', 'Save', and 'Finish'. Numbered callouts (1-6) highlight specific areas: 1 points to the 'Start New Episode' button (not visible in the screenshot but implied by the instructions), 2 points to the facility and staff dropdowns, 3 points to the intake date field, 4 points to the reason for visit text area, 5 points to the screening questions, and 6 points to the Save and Finish buttons.

## 6. SBIRT Screenings and Assessments

If the client has screened positive (any response above “0”) for ANY of the pre-screening questions, the corresponding required screenings (AUDIT, DAST-10) must be completed.

If the client screens negative on both the AUDIT and the DAST-10, a brief GPRA intake assessment must be completed.

Pre-Screen Questions	AUDIT	DAST-10	PHQ-9 (optional)	GPRA (short)	GPRA (long)
How many times in the past year have you had 4/5 or more drinks in a day?	✓				
How many times in the past year have you used an illegal drug or used a prescription medication for nonmedical reasons?		✓			
The patient screened positive on either the AUDIT or DAST-10 screening, or on both.			✓		✓
The patient screened <u>negative</u> on AUDIT and DAST-10				✓	

## 7. Entering the Alcohol Use Disorder Identification Test (AUDIT)

 **Client List > Activity List > Screening > AUDIT**

**START:** The AUDIT should be completed if the client answered 1 or more to: “How many times in the past year have you had 4/5 or more drinks in a day?” on the Intake screen. To begin, first click on **Activity List** and **Screening**. Then select the **AUDIT** link.

1. Respond to the question “Did the client complete the screener? Yes/No.” The answer will default to Yes, and if No is selected, the remaining answers will default to Not Completed.
2. Enter the client responses to questions 1 – 10.
3. Based on the responses entered, the Score and Recommendation will appear once you click **Save**.
4. When AUDIT is complete, click **Finish** to save the responses and exit the screening.

**FINISH:** You have now completed the AUDIT screening.

### Alcohol Use Disorder Identification Test (AUDIT)

Rendering Staff:

Record Created By:

Created Date:

Did the client complete the screener? Yes/No.

1. How often do you have a drink containing alcohol?

2. How many drinks containing alcohol do you have on a typical day when you are drinking?

3. How often do you have five or more drinks on one occasion?

4. How often during the last year have you found that you were not able to stop drinking once you had started?

5. How often during the last year have you failed to do what was normally expected of you because of drinking?

6. How often during the last year have you needed a first drink in the morning to get yourself going after a heavy drinking session?

7. How often during the last year have you had a feeling of guilt or remorse after drinking?

8. How often during the last year have you been unable to remember what happened the night before because of your drinking?

9. Have you or someone else been injured as a result of your drinking?

10. Has a relative, friend, doctor or other health care worker been concerned about your drinking or suggested you cut down?

Score:

Recommendation:

**Note:** The AUDIT will be scored on a scale of 0-40. Each of the question's 5 answer choices will have points assigned to them. Points allotted are: a = 0 points, b = 1 point, c = 2 points, d = 3 points, e = 4 points. Based on the final score, the system will automatically populate the Recommendation:

- 0-7: Negative
- 8-15: Brief Intervention
- 16-19: Brief Treatment
- 20-40: Referral to Treatment

## 8. Entering the Drug Abuse Screening Test (DAST-10)

 [Client List](#) > [Activity List](#) > [Screening](#) > [DAST-10](#)

**START:** The DAST-10 should be completed if the client answered 1 or more to: “How many times in the past year have you used an illegal drug or used a prescription medication for nonmedical reasons?” on the Intake screen. To begin, first click on [Activity List](#) and [Screening](#). Then select the [DAST-10](#) link.

1. Enter the client responses to questions 1 – 10.
2. Based on the responses entered, the Score and Recommendation will appear once you click [Save](#).
3. When the DAST-10 is complete, click [Finish](#) to save the responses and exit the screening.

**FINISH:** You have now completed the DAST-10 screening.

### Drug Abuse Screening Test (DAST-10)

Rendering Staff:

Record Created By:

Created Date:

*These Questions Refer to the Past 12 Months*

Did the client complete the screener? Yes/No.

1. Have you used drugs other than those required for medical reason?

2. Do you abuse more than one drug at a time?

3. Are you always able to stop using drugs when you want to?

4. Have you ever had blackouts or flashbacks as a result of drug use?

5. Do you ever feel bad or guilty about your drug use?

6. Does your spouse (or parents) ever complain about your involvement with your drugs?

7. Have you neglected your family because of your use of drugs?

8. Have you engaged in illegal activities in order to obtain drugs?

9. Have you ever experienced withdrawal symptoms (felt sick) when you stopped taking drugs?

10. Have you had medical problems as a result of your drug use (eg. memory loss, hepatitis, convulsions, bleeding)?

Score:

Recommendation:


**Note:** The DAST-10 will be scored on a scale of 0-10. Each question will allow a “yes” or “no” response. “Yes” responses are assigned a score of 1, except for question 3. A “yes” answer in question 3 is assigned a score of 0 (“no” will equal 1 point). The recommendation is based on:


- 0: Negative
- 1-2: Brief Intervention
- 3-5: Brief Treatment
- 6+: Referral to Treatment

## 9. Entering a GPRA Intake Interview

 **Client List > Activity List > Screening > GPRA**

**START:** Before beginning be sure that you have selected a client record. Click on the **Activity List** link followed by the **GPRA** link located in the left navigation menu.

1. Notice that the “GPRA Interview” screen appears. Continue by clicking on the **Add GPRA Intake** Link.
2. You will now see the first of several GPRA interview screens. Proceed by entering data in the required fields.  
Select “Treatment Client” in the Client Type field, and enter the date the interview was completed in the Interview Date field.
3. Click  to move to the next GPRA screen.

 No results match your search criteria. 

Action	Interview Type	Client type	Interview Date	Record Status

### A. RECORD MANAGEMENT

Unique Client Number

4506074523

Contract/Grant ID

TI023466

Client Type

Treatment Client

Interview Type

Intake

Did you conduct an interview?

☐

Interview Date

 mm/dd/yyyy

Was the client screened by your program for co-occurring mental health and substance use disorders?

Did the client screen positive for co-occurring mental health and substance use disorders?

Not Applicable

Created Date:

Created By:

Updated Date:

Updated By:

Upload Action:

Upload Status:

Number of Upload Errors:


Upload Date:

Response Date:

Cancel



Enter how the client screened positive or negative for the SBIRT program. The screening scores (AUDIT, DAST-10) will pre-populate based on the completed screenings. To ensure accuracy, verify that these scores are correct.

4. Select whether the client is willing to continue his/her participation in the SBIRT program. Use this question to mention if the client refuses services.
5. Continue completing the GPRA Intake interview by entering the planned services. Based on the AUDIT, DAST-10, and PHQ-9 screening recommendations, numbers 1 through 4 will be pre-populated.
6. Continue completing the planned services for the client. The "Other Clinical Services" will automatically populate "Yes" with "SBIRT Program" entered in the text box.
7. Click on the  button to proceed to the next GPRA screen.

**A. RECORD MANAGEMENT - SBIRT**

How did the client screen for your SBIRT program? Positive

What was his/her screening score?

AUDIT: 0

CAGE:

DAST:

DAST-10: 0

NIAAA Guide:

ASSIST/Alcohol Subscore:

Other (Specify)  :

Was he/she willing to continue his/her participation in the SBIRT program? Yes


Cancel
←
→

**A. RECORD MANAGEMENT - SERVICES**


**Treatment Services**  
[SELECT AT LEAST ONE SERVICE.]


1. Screening	<span style="border: 1px solid black; padding: 2px 10px;">Yes</span>	8. Group Counseling	<span style="border: 1px solid black; padding: 2px 10px;">No</span>
2. Brief Intervention	<span style="border: 1px solid black; padding: 2px 10px;">No</span>	9. Family/Marriage Counseling	<span style="border: 1px solid black; padding: 2px 10px;">No</span>
3. Brief Treatment	<span style="border: 1px solid black; padding: 2px 10px;">No</span>	10. Co-Occurring Treatment/ Recovery Services	<span style="border: 1px solid black; padding: 2px 10px;">No</span>
4. Referral to Treatment	<span style="border: 1px solid black; padding: 2px 10px;">No</span>	11. Pharmacological Interventions	<span style="border: 1px solid black; padding: 2px 10px;">No</span>
5. Assessment	<span style="border: 1px solid black; padding: 2px 10px;">No</span>	12. HIV/AIDS Counseling	<span style="border: 1px solid black; padding: 2px 10px;">No</span>
6. Treatment/Recovery Planning	<span style="border: 1px solid black; padding: 2px 10px;">No</span>	13. Other Clinical Services (Specify)	<span style="border: 1px solid black; padding: 2px 10px;">No</span>
7. Individual Counseling	<span style="border: 1px solid black; padding: 2px 10px;">No</span>		

Cancel
←
→








8. Next, complete the Demographics screen, including gender, ethnicity, race, and veteran status.
9. When you have completed entering in your GPRA data, continue clicking on the  button until you have reached the final GPRA “Summary” screen.

**A. RECORD MANAGEMENT - DEMOGRAPHICS**







1. What is your gender? Male  Other (Specify)

Are you Hispanic or  
2. Latino? No 



*[If YES] What ethnic group do you consider yourself? Please answer yes or no for each of the following. You may say yes to more than one.*

Central American	<span>Not Applica...</span> 	Puerto Rican	<span>Not Applica...</span> 
Cuban	<span>Not Applica...</span> 	South American	<span>Not Applica...</span> 
Dominican	<span>Not Applica...</span> 	Other (Specify)	<span>Not Applica...</span> 
Mexican	<span>Not Applica...</span> 		<input type="text"/>

3. What is your race? Please answer yes or no for each of the following. You may say yes to more than one.

Black or African American	<span>Yes</span> 	White	<span>No</span> 
Asian	<span>No</span> 	American Indian	<span>No</span> 
Native Hawaiian or other Pacific Islander	<span>No</span> 		
Alaska Native	<span>No</span> 		

4. What is your date of birth?

Cancel



10. To complete your GPRA Intake Interview click on the **Finish** button. If you click **Cancel** you will lose all data entered for the GPRA Intake.
11. You can print the GPRA interview by clicking on the **Generate Report**.
12. If the client is eligible for a GPRA Follow Up interview, the following question will appear after you click **Finish**: “You have been selected to participate in the GPRA Follow Up. Do you agree?” See the following section for additional information.

**FINISH:** You have now completed the GPRA Intake Interview.

Vietnam/Southeast Asia	Not Applicable
Korea	Not Applicable
WWII	Not Applicable
Deployed to a combat zone not listed above (e.g., Bosnia/Somalia)	Not Applicable

**A. MILITARY FAMILY AND DEPLOYMENT**

6. Is anyone in your family or someone close to you on active duty in the Armed Forces, in the Reserves, or in the National Guard or separated or retired from the Armed Forces, Reserves, or National Guard?

No

[IF NO, REFUSED, OR DON'T KNOW, SKIP TO SECTION B. IF YES, ANSWER FOR UP TO 6 PEOPLE.]

What is the relationship of that person (Service Member) to you?

Other (Specify):

Has the Service Member experienced any of the following?

6a. Deployed in support of combat operations (e.g., Iraq or Afghanistan)? Not Applicable

6b. Was physically injured during combat operations? Not Applicable

6c. Developed combat stress symptoms/difficulties adjusting following deployment, including PTSD, depression, or suicidal thoughts? Not Applicable

6d. Died or was killed? Not Applicable

Selected Related Service Members

← Cancel Finish

**Note:** The GPRA Interview client record files are uploaded on a nightly basis. In addition, the GPRA interview contains many business rules which will alert the end-user when incorrect data has been entered. Once an Interview has been completed, the “Interview Date” can be updated (edited).

**Note:** If the client is recommended to receive Brief Intervention, Brief Treatment, or Referral to Treatment, additional screens of the GPRA Intake Interview are required. If the client screens negative, no additional GPRA questions are required beyond the Demographics page, and you should continue to the Summary Screen.




## 10. GPRA Follow Up Selection

### Client List > Activity List > Screening > GPRA

A GPRA Follow Up interview will be required for approximately **10%** of clients entered with a recommendation of Brief Intervention, Brief Treatment, or Referral to Treatment. For those clients selected, the following question will be asked after the GPRA Intake Interview has been submitted: "You have been selected to participate in the GPRA Follow up, do you agree?" If the answer is "Yes," you will be directed back to the Client Profile to enter Contact Information and Collateral Contact Information for the client.

**START:** On the left navigation menu, click on **Client Profile**, followed by **Contact Info**.

1. Enter the required Home Phone and Other Phone numbers, and other non-required information.
2. Click **Add Address**. This will open the address information screen. Enter at least one address for the client.
3. When complete, click **Save** and then  to move to the next screen.
4. On the left navigation menu, click on **Collateral Contacts**. When you are on the Collateral Contacts screen, click **Add Contact**
5. Enter the required information (fields in dark yellow) and as much of the non-required information as you are able.
6. When complete, click **Finish** to save and exit the screen. Repeat steps 4 – 6 to enter additional Collateral Contacts. It is recommended to obtain at least three collateral contacts for each client (2 are required).

**FINISH:** You've now selected the client for a GPRA Follow Up interview and collected the necessary information in order to follow up with him/her.

You have been selected to participate in the GPRA Follow up. Do you agree?

**Yes** **No**

**Contact Info**

Home Phone #  Preferred Method of Contact

Work Phone #

Mobile #



Other Phone #

Fax #

Email Address

**Addresses** **Add Address**

Actions	Address Type	Address	Confidential	Created	Updated

**Cancel** **Save** **Finish**  

**Collateral Contacts**

Actions	First Name	Last Name	Relation	Phone Numbers	Can Contact?

**Add Contact**

First Name  Address 1

Last Name  Address 2

Relation  City  State  Zip

Gender  Can Contact  Consent On File

Date of Birth  SSN  Notes

Primary Phone #  Created

Secondary Phone #  Last Update

Mobile

Fax

Other

Legal Guardian

Active Date 8/12/2014

Inactive Date

**Cancel** **Finish**

## 11. Scheduler

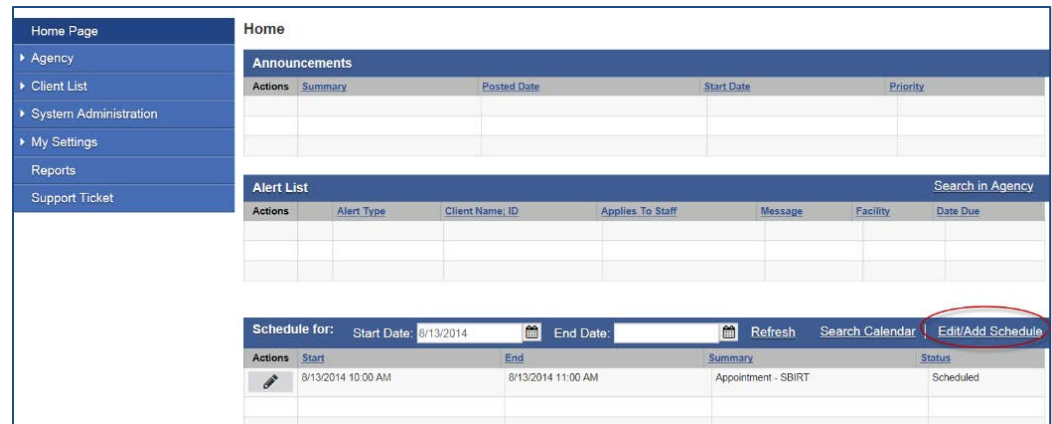
 [Home Page > Schedule](#)


You may wish to use the Scheduler to keep track of appointments for SBIRT. Using the Scheduler for client appointments allows you to create an encounter right from the home page.

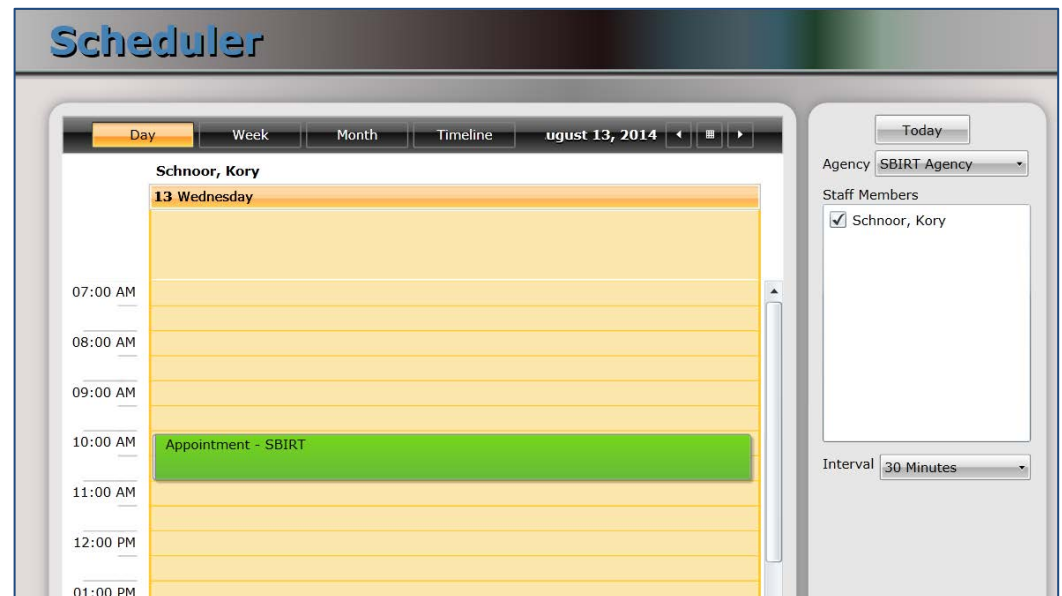
**NOTE:** You must install Silverlight on your computer the first time you access the Scheduler.

**START:** To create an appointment, click on Edit/Add Schedule.

1. The Scheduler will open a new window, showing your schedule for today. Use the week or month tabs to locate the appropriate date.
2. You may choose a different staff member if desired.
3. You may also change the interval of the appointment that is created using the dropdown.
4. Double-click on the timeslot you wish to fill. This will open an appointment window.



Actions	Start	End	Summary	Status
	8/13/2014 10:00 AM	8/13/2014 11:00 AM	Appointment - SBIRT	Scheduled



5. Choose Normal appointment (staff meeting) or Scheduled appointment (with a specific client). The required fields will be highlighted in red.
6. You may create a recurring weekly appointment by clicking **Edit Recurrence**.
7. **Save** the Appointment.
8. Each time you log into WITS, you will be directed first to your Home screen. Your scheduler list defaults to today's appointments.
9. To create an encounter directly from the scheduler, simply click **Create Encounter**. This will take you directly to the encounter screen, in the current client's episode.
10. Use Search Calendar to find all appointments in a date range and schedule reminder calls.

**Note:** Staff may also set appointments for other staff if they have the "Manage Staff Schedules" role.

Once created, any appointment may be dragged to another timeslot or date, or even to another staff member's schedule.

**FINISH:** You have now created appointments.


The image shows two screenshots from the WITS SBIRT system. The top screenshot is the 'Scheduler Edit' window, which contains the following fields:

- Summary:** A text input field.
- Staff:** A dropdown menu showing 'Conrad, Jennifer, BS'.
- Start time:** A date and time selector showing '1/21/2012' at '9:00 AM'.
- End time:** A date and time selector showing '1/21/2012' at '9:30 AM'.
- Description:** A large text area.
- Schedule Event Type:** A dropdown menu.
- Status:** A dropdown menu showing 'Scheduled'.
- Appointment Type:** A dropdown menu showing 'Scheduled' (highlighted with a red box).
- Service:** A dropdown menu showing 'Adult Halfway Housing' (highlighted with a yellow box).
- Client:** A text input field showing 'Child, Little'.
- Contracting Agency:** A dropdown menu.
- Modality:** A dropdown menu.
- Buttons:** 'Cancel', 'Save & Close', and 'Edit Recurrence'.

The bottom screenshot shows a summary table with the following data:

Actions	Start	End	Summary	Status
<a href="#">Review</a> <a href="#">Create Encounter</a>	8/13/2014 10:00 AM	8/13/2014 11:00 AM	Client: negative, test ( Age 37 ) Procedure: H0015 Appointment - SBIRT	Scheduled

## 12. Positive Pre-Screened Client List

 [Home Page > Positive Pre-Screened Client List](#)

**START:** Any clients who are recommended for Brief Intervention, Brief Treatment or Referral to Treatment will appear on the “Positive Pre-Screened Client List.” To access this list, click on **Home Page** on the left navigation menu.

Positive Pre-Screened Client List					<a href="#">See All in List</a>
<a href="#">Last Screened Date/Time</a>	<a href="#">Intake Date</a>	<a href="#">Client Name; ID</a>	<a href="#">DAST-10 Recommendation</a>	<a href="#">AUDIT Recommendation</a>	<a href="#">Actions</a>

1. To select the client, click **Review** under the Actions column. This will take you to the GPRA screen.

**NOTE:** The “Positive Pre-Screened Client List” on the Home Page will show the latest 3 clients entered. Click **See All in List** to view the entire list of clients with positive screens.

**NOTE:** Once the GPRA Intake Interview is completed, the client will be automatically removed from the “Positive Pre-Screened Client List.”

**FINISH:** You have now viewed Positive Pre-Screened Clients.

### 13. Entering the Patient-Health Questionnaire (PHQ-9) – Optional

 **Client List > Activity List > Screening > PHQ-9**


**START:** The PHQ-9 may be completed for SBIRT clients.

By clicking **Review** on that list, the PHQ-9 screening will appear. To visit the screening manually, first click on **Activity List** and **Screening**. Then select the **PHQ-9** link.

1. Enter the client responses to questions 1 – 10.
2. Based on the responses entered, the Score and Recommendation will appear once you click **Save**.
3. When the PHQ-9 is complete, click Finish to save the responses and exit the screening.

**FINISH:** You have now completed the PHQ-9 screening.

**Patient-Health Questionnaire (PHQ-9)**

Rendering Staff: Schnoor, Kory 

Created By: Schnoor, Kory

Created Date: 8/13/2014 10:41 AM

Over the last 2 weeks, how often has the client been bothered by any of the following problems?

1. Little interest or pleasure in doing things Not at all
2. Feeling down, depressed, or hopeless Several days
3. Trouble falling asleep or staying asleep, or sleeping too much More than half t...
4. Feeling tired or having little energy Nearly every day
5. Poor appetite or overeating Not at all
6. Feeling bad about yourself or that you are a failure - or have let yourself or your family down Several days
7. Trouble concentrating on things, such as reading the newspaper or watching television More than half t...
8. Moving or speaking so slowly that other people have noticed. Or the opposite - being so fidgety or restless that you have been moving around a lot more than usual. More than half t...
9. Thoughts that you would be better off dead, or of hurting yourself. Nearly every day
10. How difficult have these problems made it for the client to do their work, take care of things at home or get along with other people? Extremely difficult

Score: 14

Recommendation: Moderate depression

**Cancel** **Save** **Finish**

**Note:** The PHQ-9 will be scored on a scale of 0-27. Points allotted are: a = 0 points, b = 1 point, c = 2 points, d = 3 points. Based on the final score, the system will automatically populate the Recommendation:

- 0: Negative
- 1-4: Minimal Depression
- 5-9: Mild Depression
- 10-14: Moderate Depression
- 15-19: Moderately Severe Depression
- 20-27: Severe Depression

## 14. Entering the ASAM – Optional

 [Client List](#) > [Activity List](#) > [Screening](#) > [ASAM](#)

**START:** The ASAM screening may be completed to indicate changes in the level of care that should be provided to the client. To begin, first click on [Activity List](#) and [Screening](#). Then select the [ASAM](#) link.


1. Enter the responses to questions 1 – 6 and click Save.
2. Select the “Recommended Level of Care” and “Actual Level of Care.”
3. If the “Actual Level of Care” differs from the “Recommended Level of Care,” you will be required to select the “Clinical Override” and complete the “Comments” box.
4. When the ASAM is complete, click **Finish** to save the responses and exit the screening.

**FINISH:** You have now completed the ASAM.

ASAM — PPC2R

Dimension	Level of Risk	Level of Care
1 - Acute Intoxication and/or Withdrawal Potential	1	0.5
Comments		
2 - Biomedical Conditions and Complications	1	0.5
Comments		
3 - Emotional, Behavioral, or Cognitive Conditions and Complications	0	0.5
Comments		
4 - Readiness to Change	2	II.1
Comments		
5 - Relapse, Continued Use, or Continued Problem Potential	2	II.1
Comments		
6 - Recovery / Living Environment	1	0.5
Comments		
Recommended Level of Care	0.5	Clinical Override
Actual Level of Care	0.5	
Comments		
Assessment Date	8/13/2014	Program
		SBIRT Agency/SBIRT : 8/12/20
<a href="#">ASAM Notes</a>		<span>Cancel</span> <span>Save</span> <span>Finish</span>

## 15. Entering the Trauma Screening Questionnaire (TSQ) – Optional


 [Client List](#) > [Activity List](#) > [Screening](#) > [Trauma Screener](#)

**START:** The TSQ screening may be completed to assess whether attention should be given to past trauma of the client. To begin, first click on [Activity List](#) and [Screening](#). Then select the [Trauma Screener](#) link.

1. Enter the responses to questions 1 – 10.
2. Enter optional comments and click [Save](#).
3. View the Score and Result fields.

**FINISH:** You have now completed the TSQ.

### Trauma Screening Questionnaire(TSQ)

Rendering Staff  

Created By:

Created Date:

Over the last 3-4 weeks have you experienced any of the following?

1. Upsetting thoughts or memories about the event that have come into your mind against your will?	<input type="text" value="No"/>
2. Upsetting dreams about the event?	<input type="text" value="Yes"/>
3. Acting or feeling as though the event were happening again?	<input type="text" value="No"/>
4. Feeling upset by reminders of the event?	<input type="text" value="No"/>
5. Bodily reactions (such as fast heartbeat, stomach churning)?	<input type="text" value="No"/>
6. Difficulty falling or staying asleep?	<input type="text" value="No"/>
7. Irritability or outbursts of anger?	<input type="text" value="No"/>
8. Difficulty concentrating?	<input type="text" value="Yes"/>
9. Heightened awareness of potential dangers to yourself and others?	<input type="text" value="Yes"/>
10. Feeling jumpy or being startled by something unexpected?	<input type="text" value="Not Answered"/>

Comments

Score

Result

## 16. Entering an Encounter

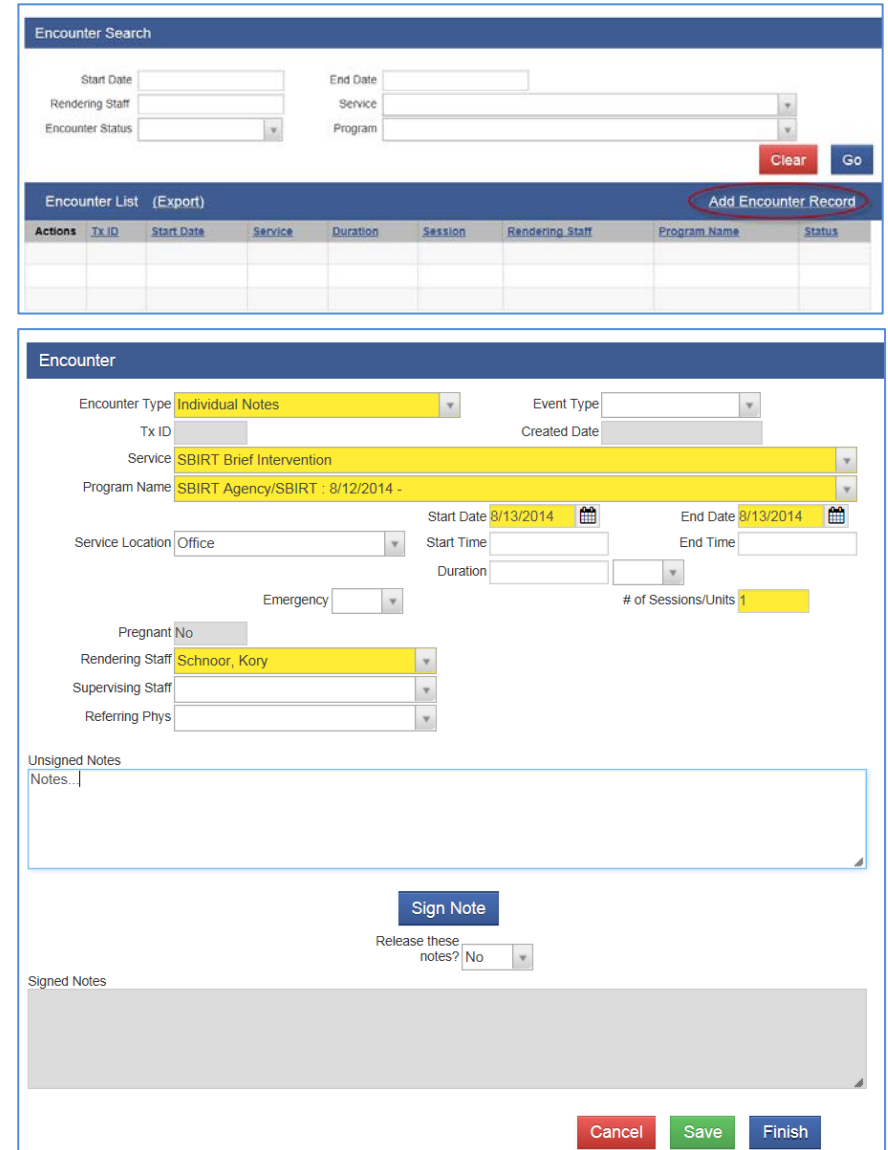
 **Client List > Activity List > Notes > Encounters**

An Encounter may be entered for clients provided Brief Intervention or Brief Treatment services. For clients with recommendations of Referral to Treatment, a Consent and Referral should be created to the appropriate agency.

**START:** Before you begin be sure to have a client record selected. Next, click on the **Activity List** link located in the left navigation menu. NOTE: If you used the scheduler to create client appointments, you may simply click “create encounter” from the home screen.

1. To enter a new Encounter Record, click **Add Encounter Record**. This action will open the Encounter Record screen.
2. Complete the required fields indicated in dark yellow, including “Note Type,” “Service,” “Duration,” and “Start Date.” You may also enter information into the non-required fields (e.g., “Service Location,” “Referring Phys”).
3. Enter notes into the “Unsigned Notes” free-text box.
4. Once the notes are entered, click **Sign Note** to complete. This action will move the note to the “Signed Notes” box with an associated date, time and user.
5. Once you complete all the required and optional fields, click **Finish** to save and complete the Encounter Record.

**FINISH:** You have now entered an Encounter Record.



The screenshot displays two screens from the WITS SBIRT system. The top screen is the 'Encounter Search' interface, which includes search filters for Start Date, End Date, Rendering Staff, Service, Encounter Status, and Program. It features 'Clear' and 'Go' buttons. Below the search filters is a table titled 'Encounter List (Export)' with columns for Actions, Tx ID, Start Date, Service, Duration, Session, Rendering Staff, Program Name, and Status. An 'Add Encounter Record' button is highlighted in the top right corner of this section. The bottom screen is the 'Encounter' form, which contains various fields for entering encounter details. Required fields are highlighted in dark yellow: Encounter Type (set to 'Individual Notes'), Service (set to 'SBIRT Brief Intervention'), Program Name (set to 'SBIRT Agency/SBIRT : 8/12/2014 -'), Start Date (set to '8/13/2014'), and Duration. Other fields include Tx ID, Event Type, Created Date, Service Location (set to 'Office'), Start Time, End Date (set to '8/13/2014'), End Time, Emergency, Pregnant (set to 'No'), Rendering Staff (set to 'Schnoor, Kory'), Supervising Staff, and Referring Phys. A free-text box for 'Unsigned Notes' is present, along with a 'Sign Note' button. Below the 'Sign Note' button is a 'Signed Notes' section with a large text area. At the bottom of the form are 'Cancel', 'Save', and 'Finish' buttons.

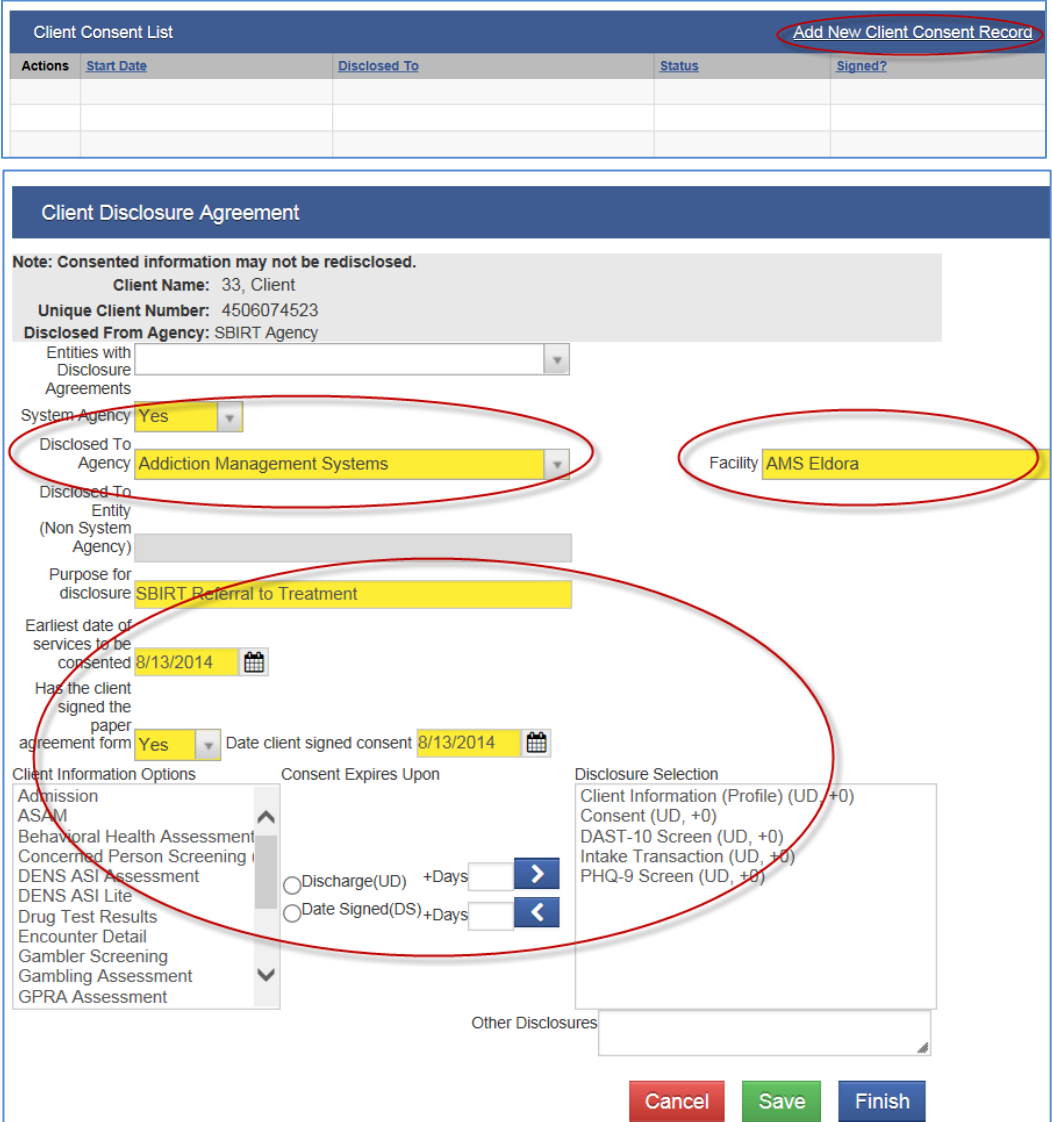


## 17. Creating a Client Consent Record

 **Client List > Activity List > Consent**

**START:** For clients with recommendations of Referral to Treatment, create a Consent and Referral. Before you begin, be sure to have a client record selected. Next, click on the **Activity List** link followed by the **Consent** link located in the left navigation menu.

1. When the “Consent” screen appears, click on the **Add New Client Consent Record** link.
2. The “Client Disclosure Agreement” screen should now appear. Next, select the desired Agency from the “Entities with Disclosure Agreements” and the “Disclosed to Agency” drop down lists.
3. Enter the “Purpose for Disclosure” and the “Earliest date of services to be consented”.
4. Proceed to select from the “Client Information Options” box along with the “Consent Expires” settings. When you have made your selection(s), click on the to move them to the “Disclosure Selection” box. (If no disclosure has been set up, see Agency disclosure setup).



The screenshot shows the 'Client Disclosure Agreement' form. A red circle highlights the 'Add New Client Consent Record' link in the top right. Another red circle highlights the 'Disclosed To Agency' dropdown menu, which is set to 'Addiction Management Systems'. A third red circle highlights the 'Facility' dropdown menu, which is set to 'AMS Eldora'. A large red circle encompasses the 'Purpose for disclosure' (set to 'SBIRT Referral to Treatment'), 'Earliest date of services to be consented' (set to '8/13/2014'), 'Has the client signed the paper agreement form' (set to 'Yes'), and 'Date client signed consent' (set to '8/13/2014'). At the bottom, there are three buttons: 'Cancel', 'Save', and 'Finish'.

Actions	Start Date	Disclosed To	Status	Signed?

**Client Disclosure Agreement**

**Note:** Consented information may not be redisclosed.

**Client Name:** 33, Client  
**Unique Client Number:** 4506074523  
**Disclosed From Agency:** SBIRT Agency

Entities with Disclosure Agreements: [Dropdown]  
System Agency: Yes [Dropdown]  
Disclosed To Agency: **Addiction Management Systems** [Dropdown]  
Disclosed To Entity (Non System Agency): [Dropdown]  
Purpose for disclosure: **SBIRT Referral to Treatment** [Dropdown]  
Earliest date of services to be consented: **8/13/2014** [Calendar]  
Has the client signed the paper agreement form: Yes [Dropdown] Date client signed consent: **8/13/2014** [Calendar]

**Client Information Options**  
Admission  
ASAM  
Behavioral Health Assessment  
Concerned Person Screening  
DENS ASI Assessment  
DENS ASI Lite  
Drug Test Results  
Encounter Detail  
Gambler Screening  
Gambling Assessment  
GPRA Assessment

**Consent Expires Upon**  
☐ Discharge(UD) +Days [Input] [Right Arrow]  
☐ Date Signed(DS)+Days [Input] [Left Arrow]

**Disclosure Selection**  
Client Information (Profile) (UD, +0)  
Consent (UD, +0)  
DAST-10 Screen (UD, +0)  
Intake Transaction (UD, +0)  
PHQ-9 Screen (UD, +0)

Other Disclosures: [Text Area]

**Cancel Save Finish**

**Note:** Once the Client Disclosure Agreement is created, a link to add a Client Referral for this consent will be available. It will open the client referral screen, and will pre-populate the signed consent and Agency fields of the Referred to section.

5. Now, click on the **Generate Report** option to print the Client Consent Form to get the client's signature on the paper copy (as shown in the figure alongside). The printed consent form includes items from the "Client Information Options" box along with the "Consent Expires" information.
6. Also, indicate whether the client has signed the agreement form. **Note:** The consent will be usable in a referral only when this last field is set to "Yes"
7. When complete, click on the **Save** button to save and complete the disclosure agreement record.

**FINISH:** You have now completed the Disclosure Agreement for this client.

The screenshot displays the WITS I-SMART Training web application. At the top, the user is logged in as 'User: Schnoor, Key' at the 'Location: SBIRT Agency, SBIRT Agency'. A red circle highlights the 'Generate Report' button in the top right corner. Below the navigation menu, the 'Client Disclosure Agreement' section is visible, showing client details for 'Client: 33, Client | 4506074523 | 3'. The 'Generate Report' button is also highlighted in this section. The resulting 'Consent' form is shown below, titled 'I-SMART Training Consent' with a 'Report Generated 08/13/2014' timestamp. The form contains the following sections:

- CONSENT FOR RELEASE OF CONFIDENTIAL INFORMATION**: A paragraph authorizing 'SBIRT Agency' to disclose information to 'Addiction Management Systems' for Client 33, with a consent date of 08/13/14.
- Other Disclosures**: A section for additional disclosures.
- Signature and Date Fields**: Fields for the participant's signature and date (8/13/2014), a witness's signature and date, and a parent/guardian's signature when required.
- PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT**: A notice explaining that the information is protected by federal confidentiality rules (42 CFR Part 2) and that the consent is necessary for disclosure.

## 18. Creating a Client Referral

 **Client List > Activity List > Referrals**

**START:** For clients with recommendations of Referral to Treatment, create a Consent and Referral. Before you begin be sure to have a client record selected. Next, click on the **Referrals** link located in the left navigation menu.

1. When the “Referral” screen appears, click on the **Add New Client Referral Record** link.
2. The “Client Referral” screen should now appear. Continue by completing the required fields in the “Referred by” section, including:
  - a. Reason – why is client being referred
  - b. Is Consent Verification Required? – Select Yes
  - c. Is Consent Verified? – Yes/No
  - d. Continue Episode of Care? – Select No
  - e. Referral Status – Do not modify
  - f. Referral Date – Do not modify

Client Referral List

**Add New Client Referral Record**

Actions	Name	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Status

**Referral**

**Referred By**

Agency SBIRT Agency

Facility SBIRT Agency

Staff Member Schnoor, Kory

Program SBIRT Agency/SBIRT : 8/12/2014 -

State Reporting Category

Reason **Level of care not available at this facility**

If Other

Is Consent Verification Required? **Yes**

Is Consent Verified? **Yes**

Continue This Episode of Care? **No**

Comments

Referral Status **Referral Created/Pending**

Projected End Date

Created Date 8/13/2014 11:09 AM

**Referred To**

Signed Consents Addition Management Systems

Agency Addition Management Systems

Facility AMS Eldora

Staff Member

Program **Extended Outpatient (I)**

State Reporting Category

Non-System Agency

Non-System Modality

Non-System Specifier

Appt Date Undetermined

Consents Granted

Consent Date: 8/13/2014

Disclosure Domains:

Client Information (Profile) (UD, +0)

Consent (UD, +0)

DAST-10 Screen (UD, +0)

Intake Transaction (UD, +0)

PHQ-9 Screen (UD, +0)

Cancel
Save
Finish

3. Next, in the “Referred To” section, complete all of the required fields, including:
  - a. **Signed Consents** – (select the consent from list of available consents)
  - b. **Agency** – (this field will auto populate based on the “Consent” selected)
  - c. **Facility** – (the facility the client is being referred to)
  - d. **Program** – (the program the client is being referred to)
4. At this point if the “Referral Status” has changed since you last checked, change it now.
5. If you have provided all of the required referral information, you may click on the **Finish** button to save and complete creation of the referral record.

**FINISH:** You have now completed a referral of a client to another Agency.

**Referral**

**Referred By**

Agency: SBIRT Agency  
 Facility: SBIRT Agency  
 Staff Member: Schnoor, Kory  
 Program: SBIRT Agency/SBIRT : 8/12/2014 -  
 State Reporting Category:  
 Reason: Level of care not available at this facility  
 If Other:  
 Is Consent Verification Required? Yes  
 Is Consent Verified? Yes  
 Continue This Episode of Care? No

**Referred To**

Signed Consents: Addiction Management Systems  
 Agency: Addiction Management Systems  
 Facility: AMS Eldora  
 Staff Member:  
 Program: Extended Outpatient (I)  
 State Reporting Category:  
 Non-System Agency:  
 Non-System Modality:  
 Non-System Specifier:  
 App Date: Undetermined

Consents Granted  
 Consent Date: 8/13/2014  
 Disclosure Domains:  
 Client Information (Profile) (UD, +0)  
 Consent (UD, 0)  
 DAST-10 Screen (UD, +0)  
 Intake Transaction (UD, +0)  
 PHQ-9 Screen (UD, +0)

Comments:

Referral Status: Referral Created/Pending  
 Projected End Date:  
 Created Date: 8/13/2014 11:09 AM

Cancel Save Finish

**Note:** System Administrators should be aware that Referral Reasons can be managed from the Referral Reasons code table, under System Administration>Code table> Referral Reasons. The Referral date will correspond to the intake date automatically created once the Referred to Agency accepts the referral.

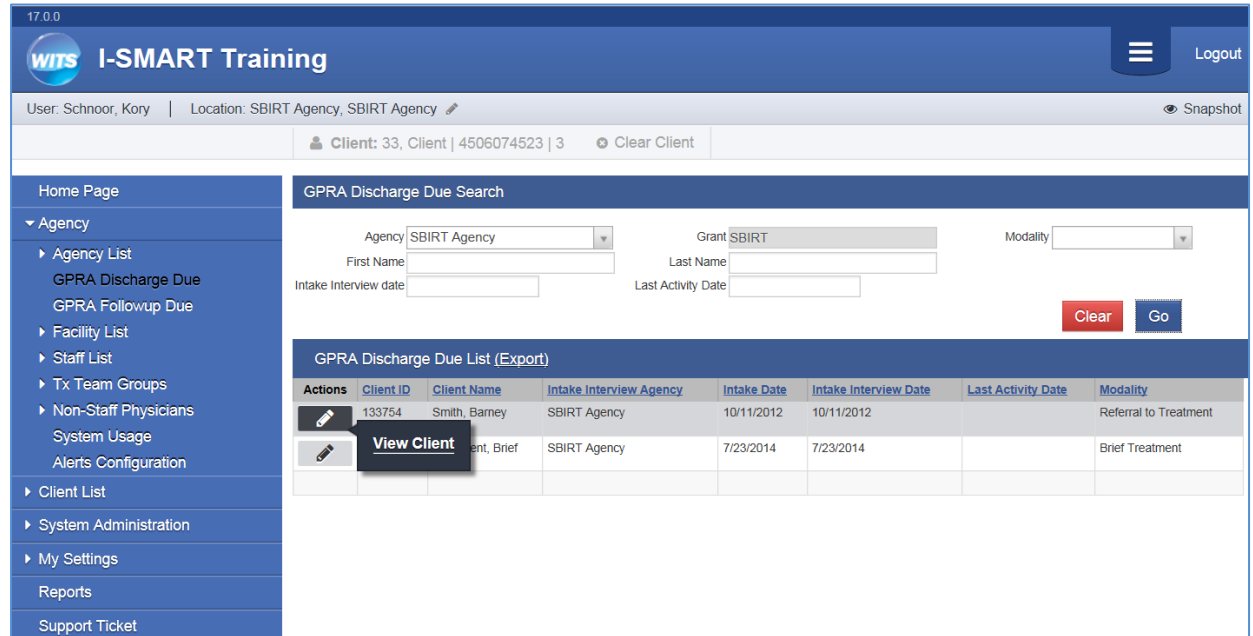
## 19. GPRA Discharge List

### Agency > GPRA Discharge Due



The GPRA Discharge Due screen allows you to see at the Agency level all the clients that have a GPRA intake interview but no Discharge GPRA interview.

**START:** From the current screen that you are in, click on the **Agency** link located in the left navigation menu. Then click on **GPRA Discharge Due** link to open the “GPRA Discharge Due” screen

1. Make your search selection on the GPRA Discharge Due Search section and click the Go button.
2. The GPRA Discharge Due List will then display all the clients that do not have a GPRA Discharge GPRA interview yet. You can export this list to Excel by clicking on the **Export** Link.
3. You may want to review each client and enter the GPRA Discharge interview from this screen, that’s why the **View Client** link is available. By clicking on this link you’ll be redirected to the client profile of the selected client.



The screenshot shows the WITS I-SMART Training interface. The top navigation bar includes the WITS logo, the title "I-SMART Training", and a "Logout" button. Below the navigation bar, the user information "User: Schnoor, Kory" and "Location: SBIRT Agency, SBIRT Agency" is displayed. A "Snapshot" button is also visible. The main content area is divided into two sections. The left section is a navigation menu with the following items: Home Page, Agency (expanded), Agency List, GPRA Discharge Due, GPRA Followup Due, Facility List, Staff List, Tx Team Groups, Non-Staff Physicians, System Usage, Alerts Configuration, Client List, System Administration, My Settings, Reports, and Support Ticket. The right section is titled "GPRA Discharge Due Search" and contains search filters for Agency (SBIRT Agency), Grant (SBIRT), Modality, First Name, Last Name, Intake Interview date, and Last Activity Date. There are "Clear" and "Go" buttons. Below the search section is a table titled "GPRA Discharge Due List (Export)". The table has columns for Actions, Client ID, Client Name, Intake Interview Agency, Intake Date, Intake Interview Date, Last Activity Date, and Modality. The table contains two rows of data. The first row shows Client ID 133754, Client Name Smith, Barney, Intake Interview Agency SBIRT Agency, Intake Date 10/11/2012, Intake Interview Date 10/11/2012, Last Activity Date, and Modality Referral to Treatment. The second row shows Client ID 133754, Client Name Smith, Barney, Intake Interview Agency SBIRT Agency, Intake Date 7/23/2014, Intake Interview Date 7/23/2014, Last Activity Date, and Modality Brief Treatment. A "View Client" button is located next to the first row.


Actions	Client ID	Client Name	Intake Interview Agency	Intake Date	Intake Interview Date	Last Activity Date	Modality
	133754	Smith, Barney	SBIRT Agency	10/11/2012	10/11/2012		Referral to Treatment
	133754	Smith, Barney	SBIRT Agency	7/23/2014	7/23/2014		Brief Treatment

**FINISH:** You have now reviewed the clients that have a GPRA discharge interview due.

## 20. Creating a GPRA Discharge Interview


 **Client List > Activity List > GPRA**

**START:** To create a GPRA Discharge Interview, you must first select a client from the Client List. Once you have selected a client, click on the **Activity List** link followed by the **GPRA** link located in the Left side navigation.

1. Next click on the **Add GPRA Discharge** link.
2. The GPRA Discharge screen will now appear. Continue and complete the interview questions, and click the  button to continue to the next interview screens.
3. When you have reached the final interview screen, click on the **Finish** button to save and complete the GPRA interview. Note that when you have finished the GPRA, you will now see it listed on the GPRA list screen. If a Discharge interview hasn't been conducted, only Sections J and K must be completed.

**FINISH:** You have now created a GPRA discharge interview.

**Note:** A GPRA Discharge interview is required if the GPRA Discharge occurs within 7 days of being conducted (the "Did you conduct the interview" question).

Add GPRA Intake   Add GPRA Followup <b>Add GPRA Discharge</b>				
Action	Interview Type	Client type	Interview Date	Record Status
	Intake	Treatment Client	10/11/2012	Completed

**You are about to enter a discharge record for this client. Would you like to continue?**

### A. RECORD MANAGEMENT


Unique Client Number

Contract/Grant ID

Client Type

Interview Type

Did you conduct an interview?

Interview Date  

Created Date:

Created By:

Updated Date:

Updated By:

Upload Action:

Upload Status:

Number of Upload Errors:

Upload Date:

Response Date:



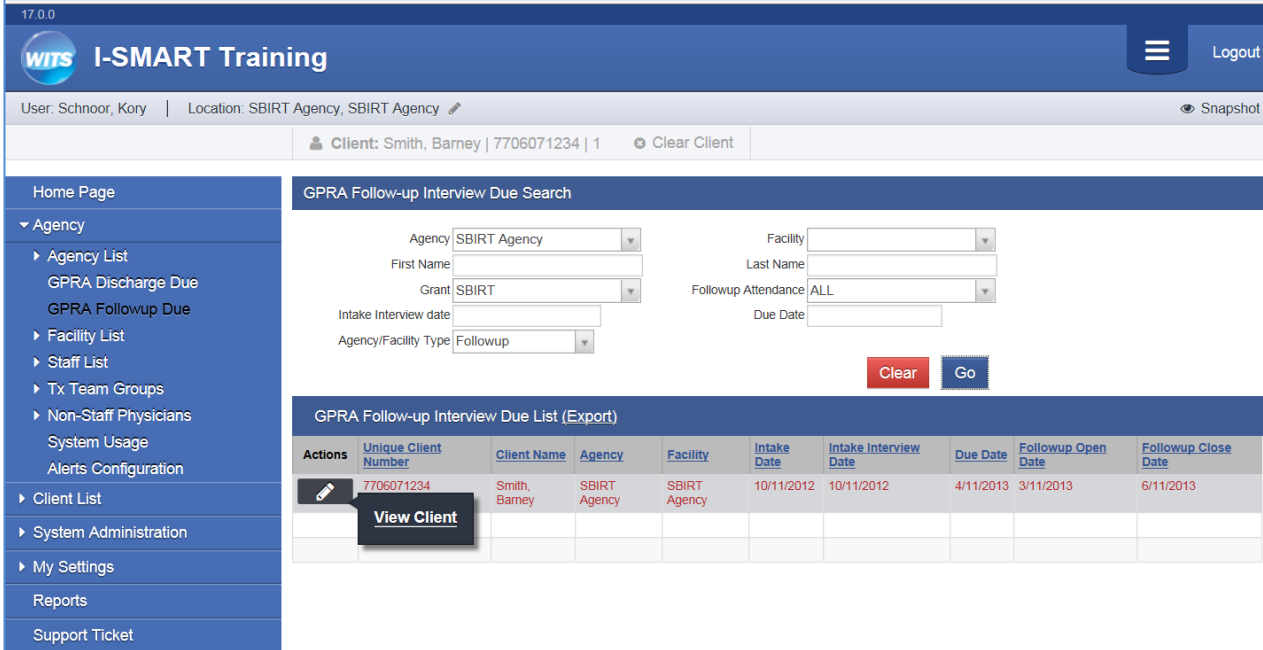
## 21. GPRA Follow Up Due List

### Agency > GPRA Followup Due

The GPRA Follow-up Due screen allows you to see at the Agency level all the clients that have a GPRA intake interview created between 5 and 8 months ago but do not have any Follow-up GPRA interview.

**START:** From the current screen that you are in, click on the **Agency** link located in the left navigation menu. Then click on **GPRA Follow-up Due** link to open the “GPRA Follow-up Due” screen.

1. Make your search selection on the GPRA Follow-up Due Search section and click on **Go**.
2. For Follow-up Attendance field, when you select **Within Window** option from the drop down menu, the GPRA Follow-up Due List will then display all the clients that do not have a GPRA Follow-up GPRA interview yet but are within the period to submit it (5-8months after the intake date). You also have the option of looking at clients that are New, or have an upcoming Follow-Up GPRA Interview, or that have missed one, etc. by selecting the criterion from the dropdown menu.
3. You may want to review each client and enter the GPRA Follow-up interview from this screen, that's why the **View Client** link is available. By clicking on this link you'll be redirected to the client profile of the selected client.



17.0.0

**WITS I-SMART Training**

User: Schnoor, Kory | Location: SBIRT Agency, SBIRT Agency

Client: Smith, Barney | 7706071234 | 1 Clear Client

Home Page

Agency

- Agency List
- GPRA Discharge Due
- GPRA Followup Due
- Facility List
- Staff List
- Tx Team Groups
- Non-Staff Physicians
- System Usage
- Alerts Configuration

Client List

System Administration

My Settings

Reports

Support Ticket

GPRA Follow-up Interview Due Search

Agency: SBIRT Agency

Facility:

First Name:

Last Name:

Grant: SBIRT

Followup Attendance: ALL


Intake Interview date:

Due Date:

Agency/Facility Type: Followup

Clear Go

GPRA Follow-up Interview Due List (Export)

Actions	Unique Client Number	Client Name	Agency	Facility	Intake Date	Intake Interview Date	Due Date	Followup Open Date	Followup Close Date
 View Client	7706071234	Smith, Barney	SBIRT Agency	SBIRT Agency	10/11/2012	10/11/2012	4/11/2013	3/11/2013	6/11/2013


**FINISH:** You have now reviewed the clients that have a GPRA Follow-up interview due.

## 22. Creating a GPRA Follow Up Interview


 **Client List > Activity List > GPRA**

A GPRA Follow Up interview will be required for approximately **every 10<sup>th</sup> client** entered with a recommendation of Brief Intervention, Brief Treatment, or Referral to Treatment.

**START:** To create a follow-up GPRA, which is created 5 months after the initial Intake GPRA interview, you must first select a client from the Client List. Once you have selected a client, click on the **Activity List** link followed by the **GPRA** link located in the Left side navigation.

1. Next, click on the **Add GPRA Follow Up** link.
2. The GPRA Follow-Up screen will now appear. Continue and complete the interview questions, and click the  button to continue to the next interview screens.
3. When you have reached the final interview screen, click on the **Finish** button to save and complete the GPRA interview. Note that when you have finished the GPRA, you will see it listed on the GPRA list screen.

**FINISH:** You have now created a GPRA follow-up interview.



Add GPRA Intake <b>Add GPRA Followup</b> Add GPRA Discharge				
Action	Interview Type	Client type	Interview Date	Record Status
	Intake	Treatment Client	10/11/2012	Completed

**You are about to enter a 6-month follow-up record for this client. Would you like to continue?**

Yes

No

### A. RECORD MANAGEMENT

Unique Client Number 7706071234  
Contract/Grant ID TI023466  
Client Type Treatment Client  
Interview Type 6-Month Follow Up  
Did you conduct an interview? Yes   
Interview Date  mm/dd/yyyy  
Created Date:   
Created By:   
Updated Date:   
Updated By:   
Upload Action:   
Upload Status:   
Number of Upload Errors:   
Upload Date:   
Response Date:

Cancel

