WITS Billing and Entry Guide

Introduction

This section of the manual is designed to give a basic overview of entering documentation into the Web Infrastructure Treatment System. Additional tips are given for how to navigate to different screens in the system as well as view agency records of clients in WITS. For more information on WITS, contact one of the following:

wits@fssa.in.gov: WITS technical assistance and support

john.long@fssa.in.gov, Larry Long: Questions about gaining initial access to WITS or specific documentation and service requirements

maholtsc@indiana.edu, Mary Lay: WITS trainings or other gambling training events

WITS Access and Login

Each staff person needing access to WITS must first complete a WITS training. This may be an in-person training or online training offered. Then, a WITS access request form must be completed and submitted to Larry Long at john.long@fssa.in.gov. Forms are available at the trainings or by request from Larry. Once access is approved, you will receive an email containing your initial login information.

The WITS log-in page is located at https://dmhaqa.fssa.in.gov/atr/. On the log-in page, enter your username and password. You will be directed to another screen where you will enter your pin number.

Required Documentation

When enrolling a client into gambling services through WITS for the first time, a provider typically goes through the following steps in WITS:

- Add New Client Profile*
- Create Episode Intake*
- SOGS/ SOGS-RA Assessment*
- Create New Voucher*
- Enter Encounter Note for Enrollment/Intake
- Complete Treatment Plan; enter Encounter Note for Treatment Plan

** Denotes documentation that must be completed on the same day client enrolls in services for problem gambling.*

Completion of WITS documentation is required for payment, and billing for a service takes place when a provider releases an Encounter Note to billing. This section of the manual gives instructions on completing the first five steps in WITS.

CANS/ANSA Completion

The client is required to be registered into DARMHA and to complete the ANSA/CANS. DARMHA procedures should be followed to complete DARMHA registration of a client and are not addressed in this manual. Note that in order to release any services to billing, a DARMHA ID must be entered into the client profile.

Ongoing Documentation

The table below details what ongoing documentation should be completed for clients enrolled in gambling services. Unless otherwise noted, the documentation is completed in WITS.
For additional requirements on documentation, including requirements for the clinical record or how encounter notes should be written, please see the Special Conditions chapter of this manual.

Ongoing WITS Documentation	
SOGS/ SOGS-RA Assessment	Minimum of every 180 days
Create New Voucher	Every 30 days, as soon as active voucher expires
Complete CANS/ANSA (in DARMHA)*	Minimum of every 180 days
Treatment Plan Review	Minimum of every 90 days
Enter Encounter Note	Every time a service is provided

I. Add New Client Profile

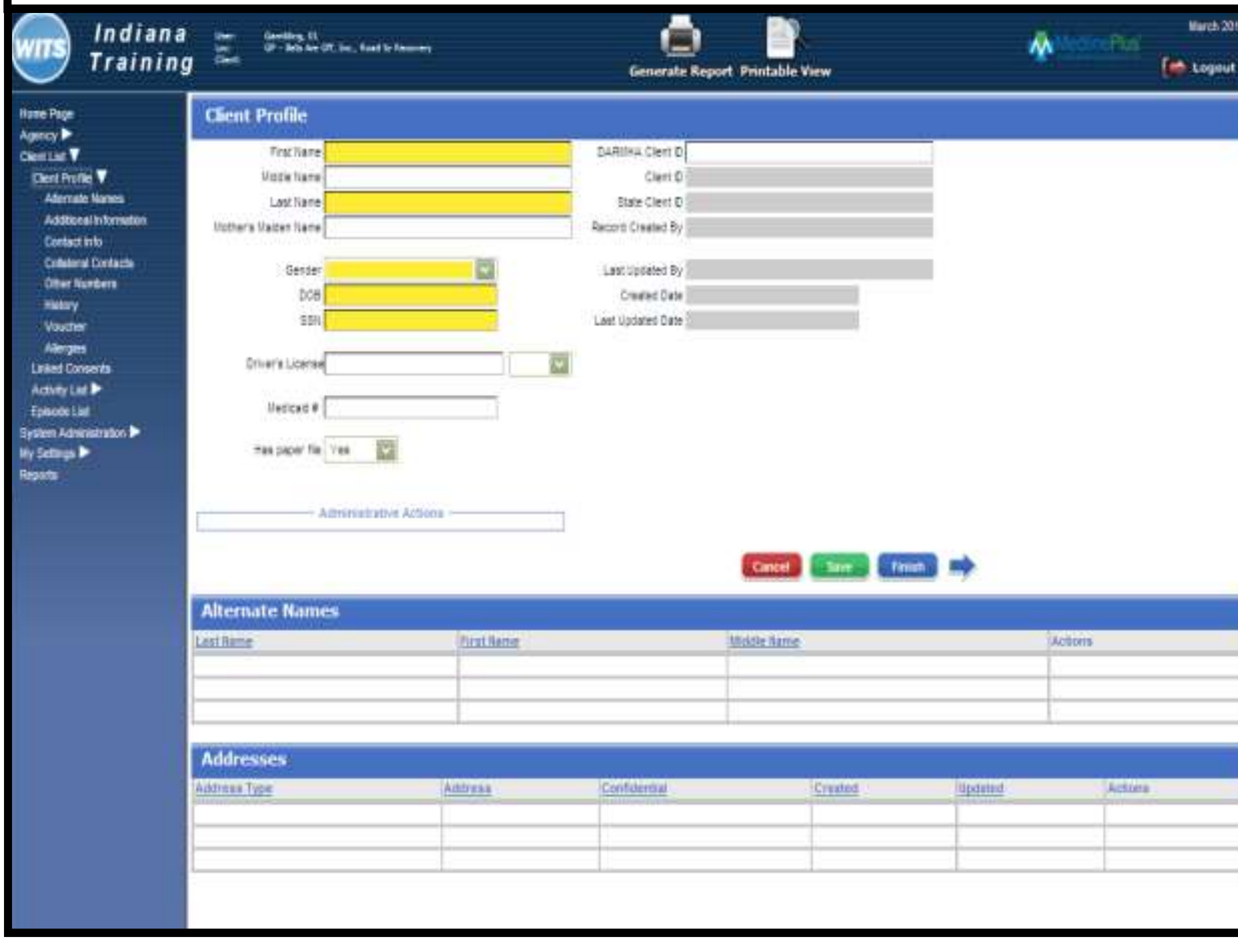
1. Click Client List. The Client List screen should appear (*Image 1-1*).
2. Click ***Add Client***.

Image 1-1. Client List Screen

NOTE: To view a list of current clients at your agency, click Go on the Client List screen. A list of clients will appear in the Client List.. Search fields are available under Client Search to find a particular client. Enter any search information and click Go.

3. Complete page 1 of the Client Profile (*Image 1-2*). **All yellow fields are required** to continue.
4. Enter DARMHA Client ID. **The DARMHA ID is required**. No billing may be released for the client until a DARMHA ID has been entered.
5. Click the blue arrow to go to the next screen of the Client Profile.

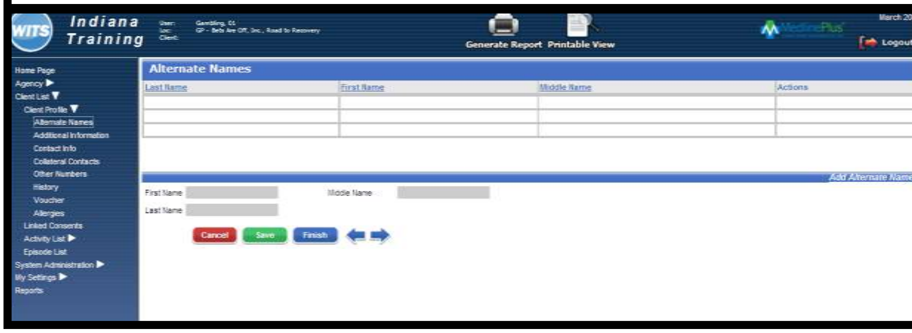
Image 1-2. Client Profile



6. The Alternate Names screen will appear (*Image 1-3*). If the client has any aliases or nicknames, this information would be entered here.

NOTE: An alternate name cannot be saved until the contact information page, shown later in this chapter, is added. To enter an alternate name, click the blue forward arrow for now and return to this screen after you have entered the client contact information.

Image 1-3. Alternate Names



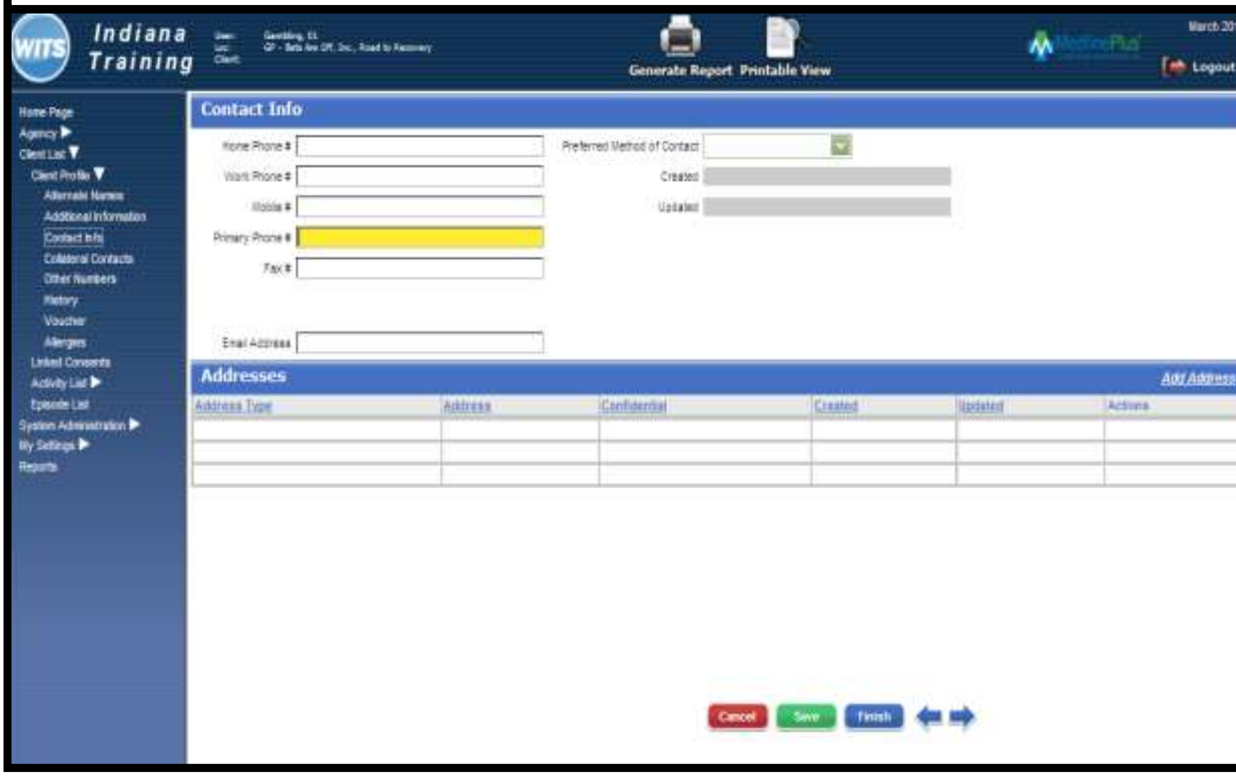
7. An Additional Information screen will appear (*Image 1-4*). Information on this page is optional.

8. Complete appropriate information and click the blue arrow to continue.

Image 1-4. Additional Information in Client Profile.

9. The Contact Info screen will appear (*Image 1-5*). Enter phone information. Primary phone number is required.
10. Click *Add Address*. Address is required.

Image 1-5. Contact Info in Client Profile.

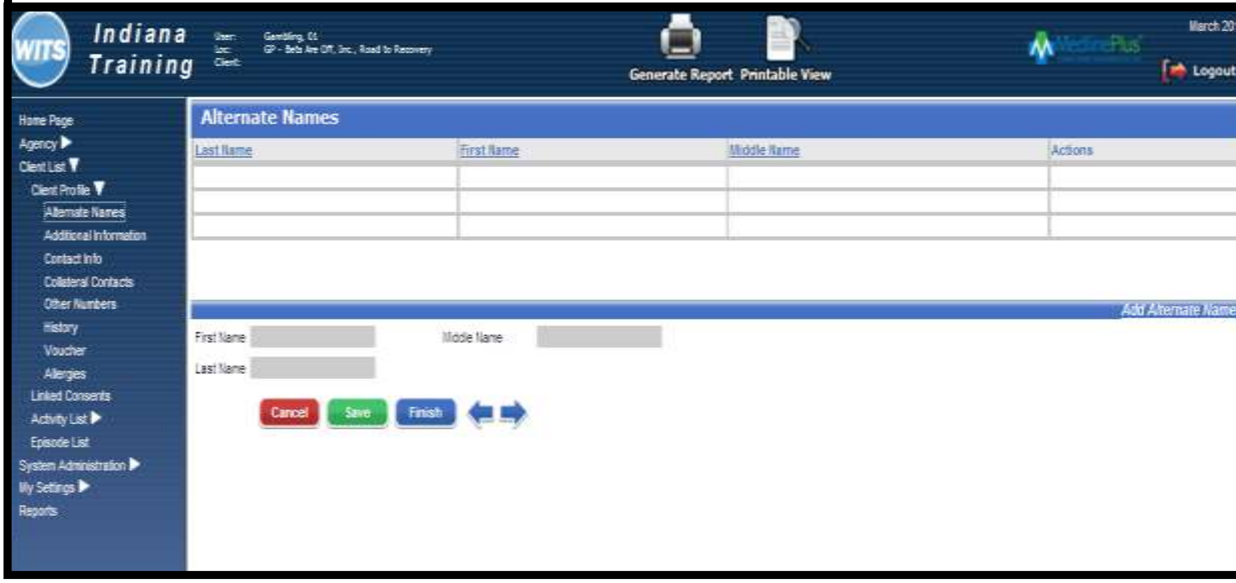


11The Address Information screen will appear (*Image 1-6*). Complete required address fields.
12. Click Finish and the Contact Info screen will appear again.
13. Click blue arrow on Contact Info screen to continue.

Image 1-6. Address Information in Client Profile.

14. Once the contact information has been entered, you may return to the Alternate Names screen by clicking the back arrow (*Image 1-7*). If no alternate names exist, skip steps 14-17.
15. Click *Add Alternate Name*. Fields for adding alternate names will appear (*Image 1-8*).

Image 1-7. Alternate Names.



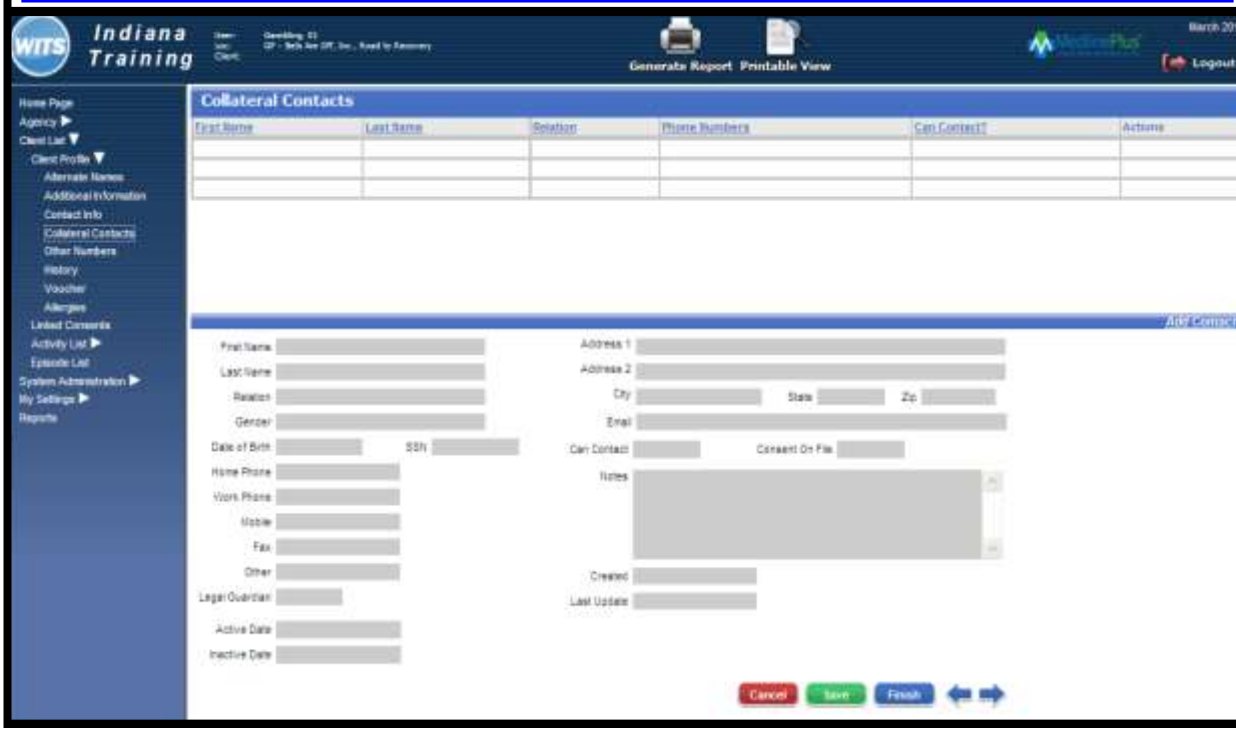
16. Enter alternate names.
17. Click Finish.

Image 1-8. Alternate Names

18. Click through blue arrows on each screen until the Collateral Contacts screen appears (*Image 1-9*). Adding a collateral contact is optional.

19. Click *Add Contact*.

Image 1-9. Collateral Contacts



20. A new screen will appear (*Image 1-10*). Enter required fields.

21. Click Finish.

22. Click blue arrow on main Collateral Contacts screen (*Image 1-9*) to continue.

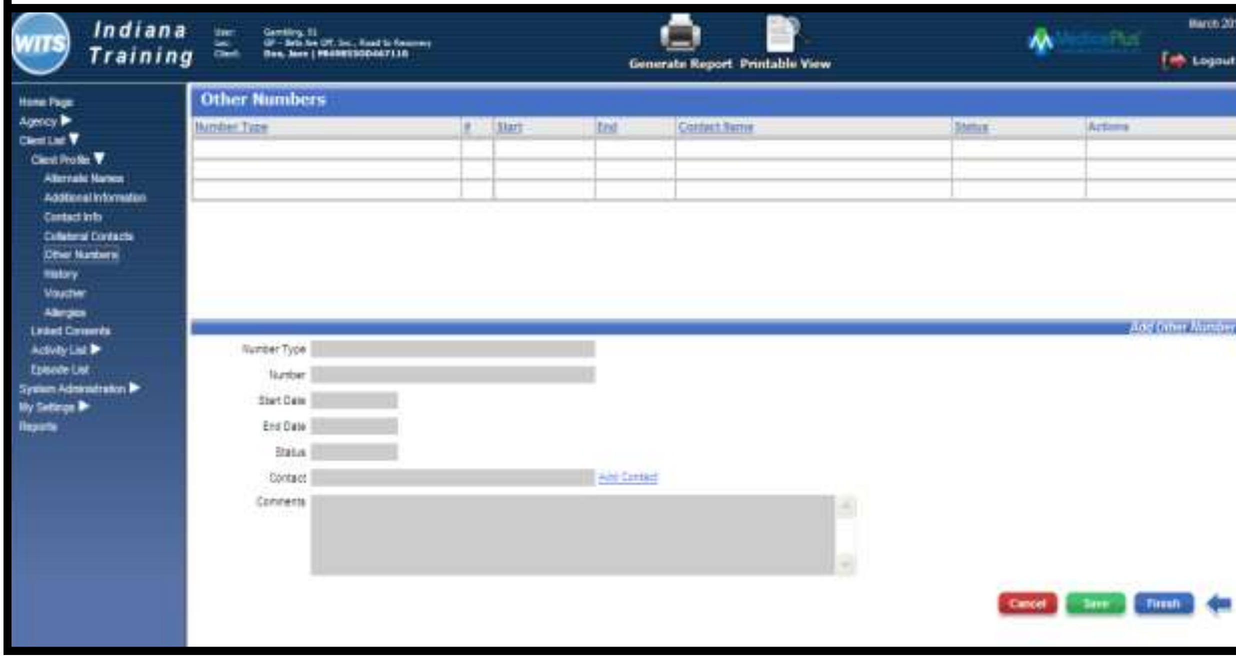
Image 1-10. Collateral Contacts

23. The Other Numbers screen will appear (*Image 1-11*). This information is optional. “Other Numbers” refers to other identification numbers an agency may use to follow the clients, such as a court case number.

24. Click *Add Other Number*. On the new screen that appears, enter desired information and click Finish.

25. Click Finish on the main Other Numbers screen.

Image 1-11. Other Numbers



The Client Profile is complete!

II. Create Episode Intake

1. On side menu, Click Activity List. The Episode List screen will appear (*Image 2-1*).
2. Click *Start New Episode*.

Image 2-1. Episode List

3. Intake Case screen will appear (*Image 2-2*). Complete information.
   - Source of Referral dropdown: Scroll and choose Other or Gambling Hotline as referral source.
   - Referral Contact dropdown: Any collateral contacts you've entered previously will appear in the dropdown. To add a contact, click *Add Referral Contact Info* below the dropdown.
   - Special Initiative dropdown: Scroll and choose Gambling Only.
4. Click Finish.

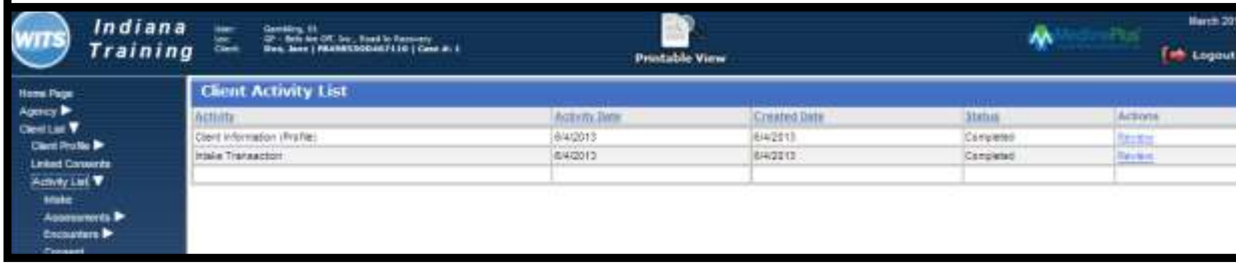
The Episode Intake is complete!

Image 2-2. Intake Case Information

III. Complete SOGS/SOGS-RA

1. The Client Activity List screen will appear once a new Episode Intake has been created (*Image 3-1*). On menu under Activity List, click Assessments.

Image 3-1. Client Activity List



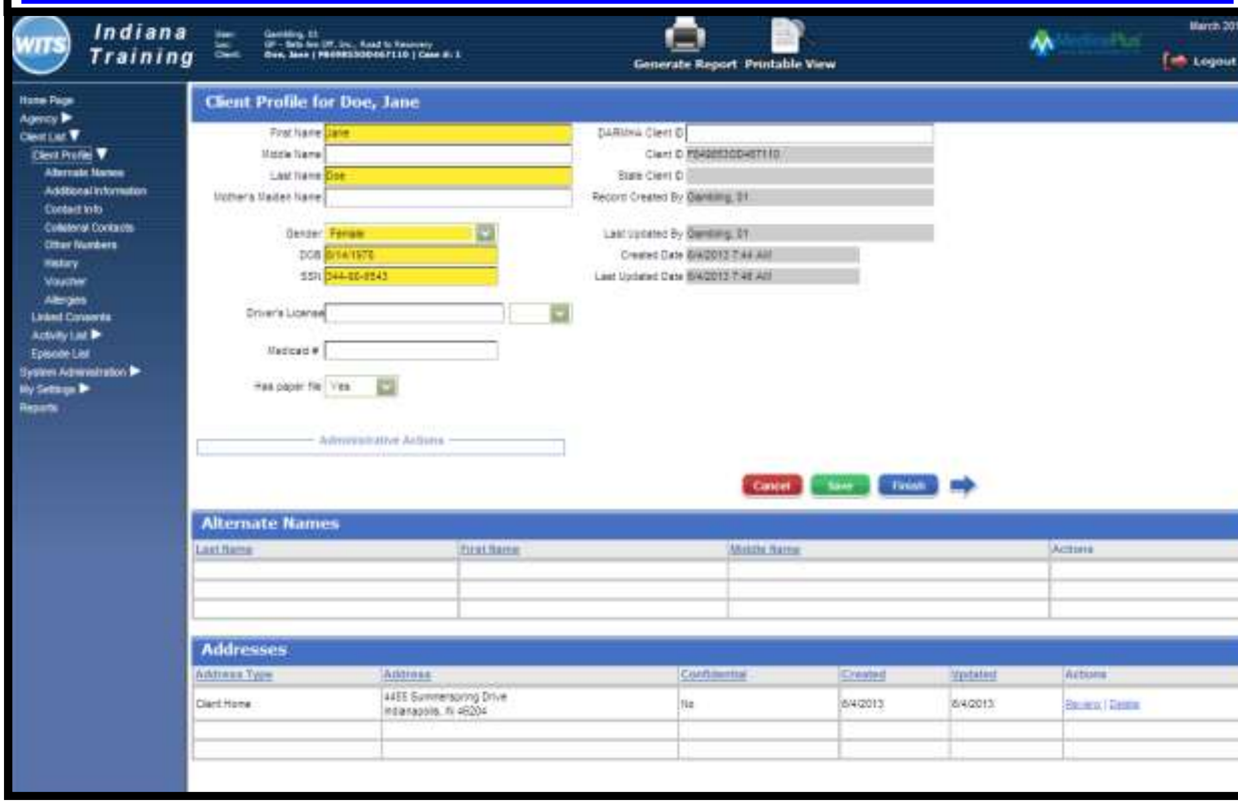
2. On menu, click SOGS for adults or SOGS-RA for children 17 and under.
3. On menu, click Question 1.
4. Complete SOGS questions. There will be three screens of the SOGS assessment. Click forward arrow to complete all pages.
5. After completing Question 18 on the SOGS (see Image 3-2), click Save to save and view client's SOGS score. Client's SOGS will appear in lower left corner.
6. Click Finish to save and exit the SOGS assessment.

Image 3-2. SOGS Assessment

IV. Create New Voucher

1. On side menu, click Client Profile. Client Profile screen will appear (*Image 4-1*).

Image 4-1. Client Profile

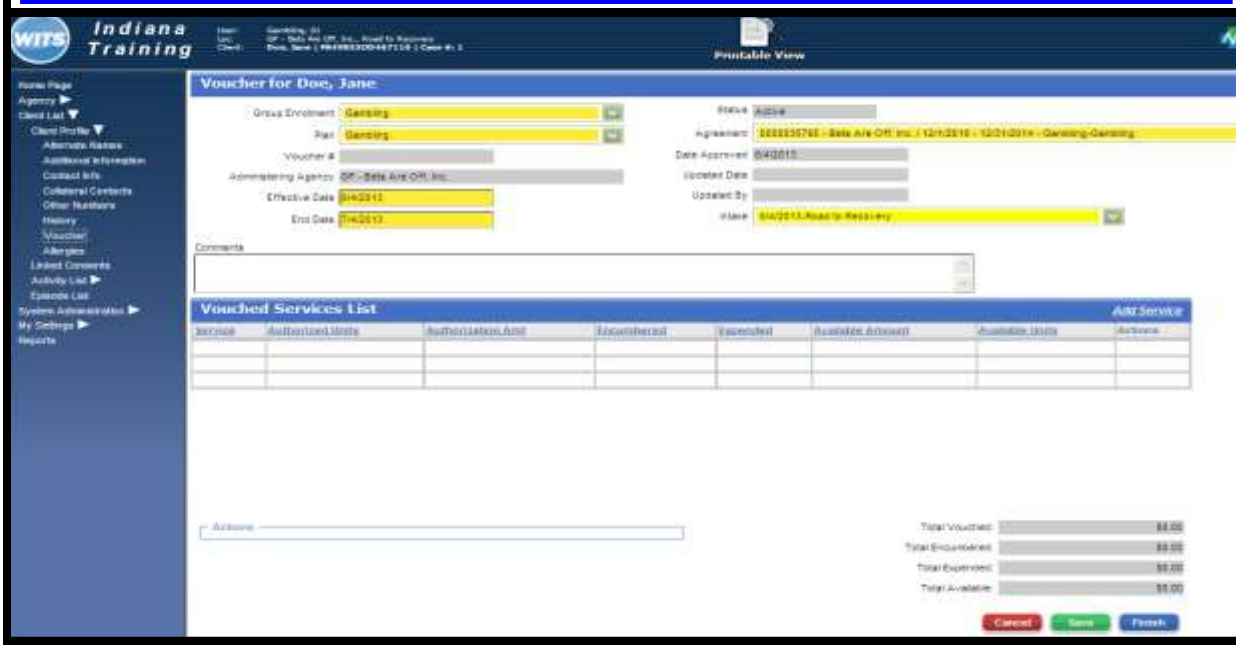


2. On menu, click Voucher. Voucher List screen will appear (*Image 4-2*).
3. Click *Add New Voucher Record*.

Image 4-2. Voucher List

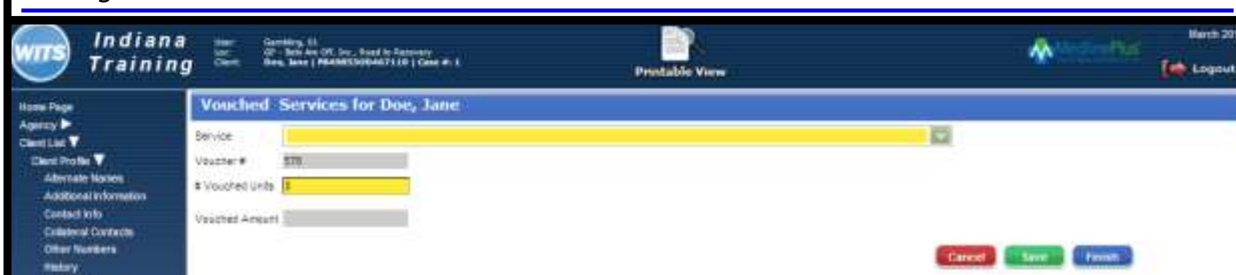
4. The Voucher screen will appear (*Image 4-3*). Required fields should be pre-populated.
5. Enter voucher Effective Date. Date must be within last 9 days. If a date 10 days or more before the current date is entered, an error message will appear.
6. Click Save.
7. Click *Add Service*.

Image 4-3. Voucher for Client



8. Vouched Services screen will appear (*Image 4-4*). From dropdown, select a service that will be given to the client in the next 30 days.
9. Enter the number of vouched units expected to be served in the next 30 days. For unit amounts and limitations, see the "Special Conditions" chapter of this manual.
10. Click Finish. You will be returned to the main Voucher screen.

Image 4-4. Vouched Services

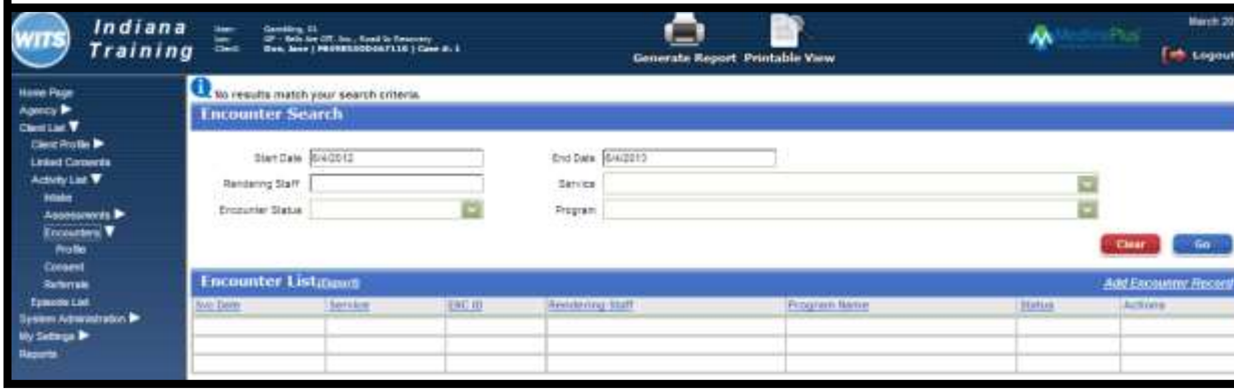


11. Continue adding services until all expected services for the next 30 days have been added. Consider adding more services than anticipated in case the client needs additional services in the 30-day period.
12. Click Finish. The screen will return to the Voucher List page. Voucher is complete!

V. Create New Encounter

1. On menu, click Activity List.
2. On menu, click Encounters. Encounter List page will appear (*Image 5-1*).
3. Click *Add Encounter Record*.

Image 5-1. Encounter List



4. Encounter screen will appear (*Image 5-2*). Complete required fields.
5. Click Save.
6. To release to billing, click Release to Billing beneath the notes section.
7. Click Finish. A new encounter note is completed.

Image 5-2. Encounter

Note: Encounter notes can be edited until they are released to billing. Once released to billing, they are locked from editing.

Note that an error message will appear if an attempt is made to release an encounter to billing, but no DARMHA ID was entered for the client. See *Image 5-3* and steps to add DARMHA ID below.

Image 5-3. Error Message– No DARMHA ID

If the error occurs, complete the following steps:

- In menu, click Client List, then Client Profile.
- Add DARMHA Client ID on first page of profile.
- Click Save.
- In menu, click Activity List, then click Encounters to return to Encounter List.
- Click Review to return to Encounter screen.

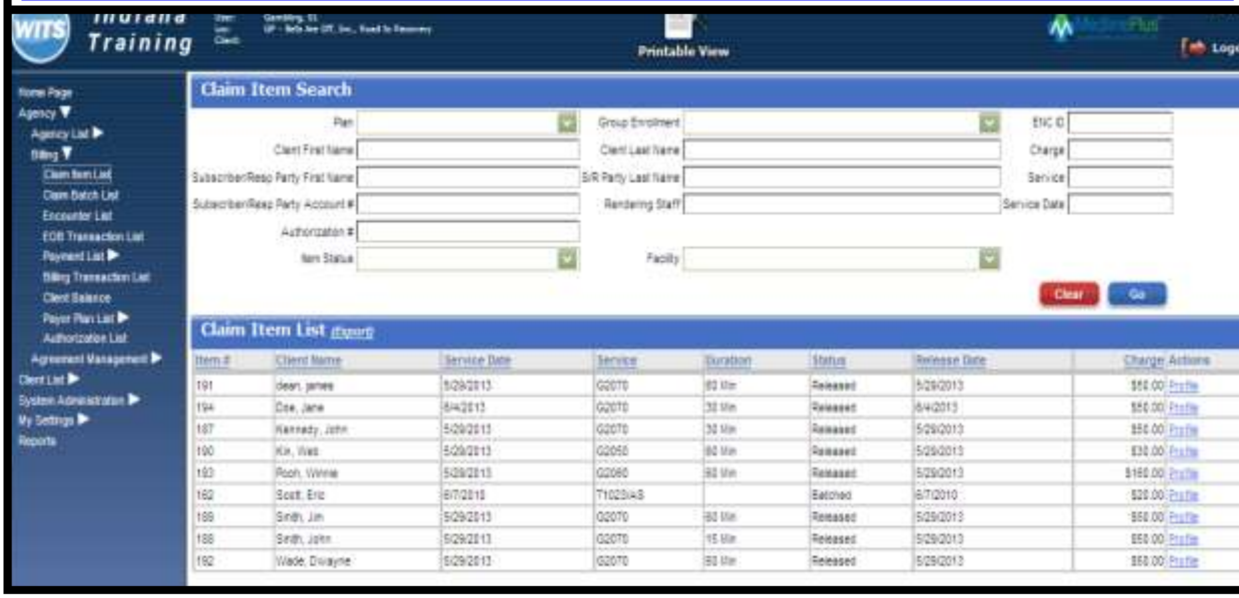
Always remember to log out of WITS. Not logging out after a session will prevent you from being able to log in to your next session, even if you close the browser.

VI. Review Records for Agency

Review Encounters for the Agency

1. On menu, click Agency, click Billing, click Claim Item List.
2. Change the Item Status field to blank to see all encounters.
3. Click Go to review encounters. Claim Item List will appear (see *Image 6-1* below).

Image 6-1. Claim Item Encounter List



Review Vouchers for the Agency

1. On menu, click Agency, click Billing, click Authorization List.
2. Enter any desired search terms in the available fields.
3. Click the Go button to review vouchers.

Image 6-2. Voucher List

V. Quick Step Guides

Steps to Add New Client Profile

1. On menu, click Client List.
2. On Client List screen, click ***Add Client***.

3. On Client Profile screen, complete appropriate fields. **All yellow fields and the DARMHA client ID are required.** No billing may be released for the client until a DARMHA ID is entered.
5. Click blue arrow.

6. On Add Alternate Names screen, enter any aliases or nicknames the client has.
NOTE: An alternate name cannot be saved until the contact information for a client is added. Return to this screen after completing the contact information to enter alternate names. Click the blue arrow.

7. On Additional Information screen, complete appropriate fields.
8. Click blue arrow.

9. On Contact Info screen, enter phone information. Primary phone number is required.
10. Click *Add Address*. Address is required.
11. On Add Address screen, complete required address fields.
12. Click Finish.
13. Click blue arrow on Contact Info screen.

14. Once the contact information has been entered, you may return to the Alternate Names screen by clicking the back arrow. If no alternate names exist, skip steps 14-17.
15. Click *Add Alternate Name*.
16. Enter alternate names.
17. Click Finish.
18. Click through blue arrows on each screen until the Collateral Contacts screen appears.

19. Click *Add Contact*.
20. On Contact screen, enter required fields.
21. Click Finish.
22. Click blue arrow.

23. On Other Numbers screen, click *Add Other Number* to add other numbers. "Other Numbers" refers to other identification numbers an agency may use to follow the clients, such as a court case number.
24. Click Finish.

Steps to Create Intake Episode

1. On side menu, click Activity List.
2. On Episode List screen, click *Start New Episode*.
3. On Intake Case screen, complete information.
   - Source of Referral dropdown: Scroll and choose Other or Gambling Hotline as referral source.
   - Referral Contact dropdown: Any collateral contacts you've entered previously will appear in the dropdown. To add a contact, click *Add Referral Contact Info* below the dropdown.
   - Special Initiative dropdown: Scroll and choose Gambling Only.
4. Click Finish.

Steps to Complete SOGS Assessment

1. On menu under Activity List, click Assessment, click SOGS or SOGS-RA, click Question 1.
2. Complete SOGS questions. Click forward arrow to complete all pages.
3. After completing SOGS questions, click Save to save and view client's SOGS score. Client's SOGS will appear in lower left corner.
4. Click Finish to save and exit the SOGS assessment.

Steps to Create New Voucher

1\. On side menu, click Client Profile, then click Voucher.
3\. On Voucher List screen, click *Add New Voucher Record*.
4\. On voucher screen, required fields should be pre-populated.
5\. Enter voucher Effective Date. Date must be within last 9 days.
6\. Click Save.
7\. Click *Add Service*.
8\. From dropdown on Vouched Services screen, select a service that will be given to the client in the next 30 days.
9\. Enter the number of vouched units expected to be served in the next 30 days.
10\. Click Finish.
11\. Continue steps 7-10 until all expected services for the next 30 days have been added.
12\. Click Finish.

Steps to Create New Encounter Note

1\. On menu, click Activity List, then click Encounters.
3\. On Encounter List screen, click *Add Encounter Record*.
4\. On Encounter screen, complete required fields.
5\. Click Save.
6\. To release to billing, click Release to Billing beneath the notes section.
7\. Click Finish.

WITS Side Menu Navigation

WITS Task	Menu Navigation
Add New Client	Client List > On screen, click Add Client
Choose Existing Client	Client List > On screen, enter search terms and click Go
Add/Update Intake	Client List > Activity List > Intake
Add/Update Assessment	Client List > Activity List > Assessments > SOGS > Question 1
Create/ Review Voucher	Client List > Client Profile > Voucher
Add/ Update Encounter	Client List > Activity List > Encounters
Review Records	Agency > Agency List > Billing > (choose item to view)