OWITS Reference Manual

Volume 1

OWITS Basics

Revision 2-1

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Description

"OWITS Basics" provides an overview of the Oregon Web Infrastructure for Treatment Services system. It describes system requirements, system access, and the general structure and layout for most modules and screens within the program.

Purpose

To introduce users to OWITS and to provide foundation of the knowledge required for using the system.

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Definitions / Abbreviations

- Access Level / Access Rights: General terms referring to OWITS security settings which allow users to access some functions or data but not others. OWITS defines Access Level and Access Rights through the "Job Function Roles" and "Role Attributes" settings.
- Agency: The collective locations and offices of a company, corporation, or organization that provides addiction recovery or mental health treatment and services. See also *Facility*.
- AMH: The Addictions and Mental Health division of the Oregon Health Authority.
- Box: A general term for a square or rectangle that appears on a web page and is generally used for data entry. See also *Field*, *Option Transfer Box*, and *Text Box*.
- Browser: Computer software used to locate, retrieve, and display content on the World Wide Web.
- Button: An image or icon on a computer screen that executes a command when clicked, such as "the OK button" or "the Cancel button."
- Character: A single unit of information, including letters, numerical digits, punctuation marks, spaces, and symbols.
- Click: To press a button on a computer mouse. "Click" refers to pressing the left mouse button once. "Double-click" refers to pressing the left mouse button twice in rapid succession. "Right-click" refers to pressing the right mouse button once.
- Client: An individual who is receiving, has received, or will receive treatment or services.
- Data / Dataset: Pieces of information or groups of pieces of information.
- Default: A preset setting or value; an option that is automatically selected in every situation.
- Dial-Up: A low-speed Internet connection that uses a telephone line.
- Dialogue Box: A type of window that appears in specific circumstances that allows users to perform a command, asks users a question, or providers users with information.
- Drop-Down Menu: A list of options in a data entry field that allows users to select only one item.
- DSL: Digital Subscriber Line – a type of high-speed Internet connection usually associated with a telephone line.
- EHR: Electronic Health Record – computer software designed to track data regarding the demographics and treatment of patients.
- Environment: A subdivision of the overall OWITS system containing all available aspects of the program but producing a different final result.
- Facility: The individual locations or offices of a company, corporation, or organization that provides addiction recovery or mental health treatment and services. Multiple facilities may exist within a single agency. See also *Agency*.
- FEi: Focused eHealth Innovations – The vendor that provides and supports the WITS software to Oregon. See also *OWITS*.
- Field: A general term for an individual point of data entry on a web page or in a database application, usually a smaller piece of data from a larger collection or a record.
- File: A self-contained block of information or resource for storing information—such as a document, spreadsheet, or image—stored in or used by a computer or related device.

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- GB: Gigabyte – a metric measurement of computer memory defining approximately one billion bytes of data.
- Heading / Subheading: The title of an OWITS module or of divisions and screens within OWITS modules. See also *Module*.
- IP Address: A numerical label assigned to each device (computer, printer, etc.) participating in a computer network.
- Key: A button on a computer keyboard, such as "the Enter key" or "the CTRL key."
- Link: Short for "hyperlink," a connection to another web site or document.
- MB: Megabyte – a metric measurement of computer memory defining approximately one million bytes of data.
- Module: A smaller component of a larger system.
- Navigate / Navigation: Movement through a series of data entry screens.
- Navigation Pane / Navigation View: The OWITS menu system, located on the left side of each OWITS page.
- Option Transfer Box: A pair of boxes on a web page that allow options to be selected and moved from one box to another. Also known as a "Mover Box."
- OWITS: Oregon Web-Infrastructure for Treatment Services – an electronic behavioral health record program as modified for Oregon.
- Pop-up: A new browser window that opens to display additional information without disrupting the page currently open.
- RAM: Random-access memory – temporary data storage within a computer that holds data for tasks in progress.
- Screen: A specific informational view that can be displayed in OWITS at one time.
- T1: A type of high-speed Internet connection.
- Table: A grid of information with rows of information divided into categorical columns.
- Text Box: A bordered square or rectangle in a web page into which users can type text.
- Tier: A layer or ranking within a hierarchy.
- Tier 1 Support: The first level of OWITS support, administered at the agency.
  See Appendix A – Definitions of OWITS Support Tiers.
- Tier 2 Support: The second level of OWITS support, administered by AMH.
  See Appendix A – Definitions of OWITS Support Tiers.
- Tier 3 Support: The third and highest level of OWITS support, administered by FEi.
  See Appendix A – Definitions of OWITS Support Tiers.
- Treatment Domain: A designation in OWITS client records that separates some client information based on the type of treatment or service administered.
- URL: Uniform Resource Locator – a string of characters that constitute a reference to an Internet resource, such as a file or web page.
- User: A person who interacts with the OWITS system.

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- User ID: A unique name assigned to each user to control access to confidential records or to OWITS in general and to track record change history.
- Value: A specific data point for a given data type, such as one option in a drop-down menu.
- Wi-Fi: Technology allowing electronic devices (such as computers) to exchange information over a computer network using radio waves.
- Wildcard: A character such as an asterisk (*) or a question mark (?) that can be used in place of letters or other characters to indicate an unknown value. See also *Character*.
- WITS: Web-Infrastructure for Treatment Services – an electronic behavioral health record program.

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1.0 Welcome to OWITS.

1.1 OWITS is the Oregon Web-Infrastructure for Treatment Services, which is an Electronic Health Record, specifically designed for behavioral health providers in Oregon.

1.1.1 OWITS is free-to-use for all behavioral health providers in Oregon who receive public funds, whose clients pay for services with public funds, or who are required to report treatment data.

1.1.2 OWITS will remain free-to-use until July 1, 2015, at which point its support and maintenance will be funded by its users.

1.2 This reference manual is part of a series of documents that will provide instructions for using OWITS.

1.2.1 For a list of reference manual titles, see Appendix B – OWITS Reference Manual Volume Titles.

1.2.2 Reference manuals will use OWITS terminology instead of ISSR, business, or clinical terminology.

1.2.3 Reference manuals are released in volumes and revisions.

1.2.3.1 Volumes refer to specific categorical aspects of OWITS.

1.2.3.2 Revision numbers are used to indicate that a volume has been updated to reflect changes in OWITS, policies, procedures, or other factors that affect the use of the system.

1.2.4 Reference manuals are available electronically from AMH.

1.2.4.1 Reference manuals and other reference material can be requested by email (see 10.4.1).

1.2.5 Reference manuals may be updated in full (by revision) or in part (by editing).

1.2.5.1 New revisions will include previous changes.

1.2.5.2 A revision number consists of two numbers, separated by a hyphen.

1.2.5.2.1 The first number changes when the core of the document is updated, including when new sections are incorporated into existing text.

1.2.5.2.2 The second number changes when portions of the manual are edited to reflect system updates, to correct errors, or to clarify existing text.

1.3 OWITS users are encouraged to pay close attention to the Definitions / Abbreviations section of these reference manuals.

1.4 Specific questions about OWITS should be directed to state OWITS system administrators (see 10.4).

1.5 In the sections below, independent text and field labels quoted from OWITS will be *italicized*.

2.0 System Requirements

2.1 Use of OWITS requires at least one computer with the following technical specifications:

2.1.1 1 GB or more RAM

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2.1.2 Monitor or screen with resolution 1024 x 768 or better

2.1.3 High-speed Internet access (such as Cable, DSL, T1, etc.)

2.1.3.1 Dial-up Internet access is functional on a temporary basis, but performance speed will be significantly reduced.

2.1.4 Microsoft Internet Explorer, version 6.0 or better

2.1.4.1 OWITS is not currently compatible with *any* other web browsing software.

2.1.4.1.1 Attempting to access and use OWITS with a different browser (such as Safari, Mozilla Firefox, or Google Chrome) will result in problems and errors.

2.1.4.1.2 Setting Google Chrome as the computer's default browser may disable access to OWITS until Internet Explorer is set as the default browser.

2.1.4.1.3 It is possible to use OWITS on a computer with an operating system other than Microsoft Windows, but to avoid errors and limited functionality, Internet Explorer must be used as the web browser.

2.1.4.2 Pop-ups must be allowed for some OWITS features to function properly.

2.1.4.2.1 To enable ALL pop-ups:

2.1.4.2.1.1 In Internet Explorer, open the Tools menu.

2.1.4.2.1.2 Place the mouse cursor over "Pop-up Blocker" or locate the "Pop-up Blocker" settings in "Internet Options."

2.1.4.2.1.3 Click "Turn Off Pop-up Blocker."

2.1.4.2.2 To enable pop-ups only for OWITS:

2.1.4.2.2.1 In Internet Explorer, open the Tools menu.

2.1.4.2.2.2 Place the mouse cursor over "Pop-up Blocker" or locate the "Pop-up Blocker" settings in "Internet Options."

2.1.4.2.2.3 Click "Pop-up Blocker Settings".

2.1.4.2.2.4 Click in the text box labeled "Address of website to allow."

2.1.4.2.2.5 Type: or.witsweb.org

2.1.4.2.2.6 Click Add.

2.1.4.2.2.7 Click in the text box labeled "Address of website to allow."

2.1.4.2.2.8 Type: or-training.witsweb.org

2.1.4.2.2.9 Click Add.

2.1.4.2.2.10 Click Close.

2.1.4.3 Internet Explorer's history settings must be modified for OWITS reports to display properly.

2.1.4.3.1 In Internet Explorer, open the Tools menu.

2.1.4.3.2 Click "Internet Options."

2.1.4.3.3 Under the "Browsing History" heading, click the Settings button.

2.1.4.3.4 Under the text "Check for newer versions of stored pages," click the radio button (circle) next to "Every time I visit the webpage."

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2.1.4.3.5 Click OK.

2.1.4.3.6 Click OK.

2.1.4.4 Internet Explorer's security settings must be modified for OWITS to properly display certain downloadable files.

2.1.4.4.1 In Internet Explorer, open the Tools menu.

2.1.4.4.2 Click "Internet Options."

2.1.4.4.3 Click the "Security" tab.

2.1.4.4.4 In the box labeled "Select a zone to view or change security settings," select the "Internet" icon.

2.1.4.4.5 In the box labeled "Security level for this zone," click the "Custom Level" button.

2.1.4.4.6 In the "Settings" box, scroll down to the "Miscellaneous" heading.

2.1.4.4.7 Under the "Access data sources across domains" subheading, click "Enable."

2.1.4.4.8 Click OK.

2.1.4.4.9 If a warning message appears, click "Yes."

2.1.4.4.10 Click OK.

2.1.4.5 Internet Explorer's compatibility mode may need to be activated for OWITS to display data and data fields correctly in Internet Explorer version 8.0 and higher.

2.1.4.5.1 In Internet Explorer, navigate to the launch page for either OWITS environment (see 3.1 and 3.2).

2.1.4.5.2 To the far right of the address bar at the top of the screen, an icon that looks like a torn sheet of paper will appear in most versions of Internet Explorer.

2.1.4.5.2.1 If the icon does not appear, compatibility mode may be in the Tools menu or the Internet Options menu.

2.1.4.5.3 Click the torn paper ("compatibility mode") icon so that it turns blue.

2.1.4.5.4 Internet Explorer will record this compatibility setting for the OWITS domains.

2.1.5 OWITS does not include spell-check functionality.

2.1.5.1 OWITS functions inside Internet Explorer, and Internet Explorer versions prior to 10 do not include a built-in spell checker.

2.1.5.2 Some users prefer to install spell-check add-on software in Internet Explorer for use in OWITS.

2.1.5.3 Various spell-check add-ons are available online, with multiple pricing structures, including tools such as the following:

2.1.5.3.1 ieSpell

2.1.5.3.2 Speckie

2.1.5.3.3 IE7Pro Spell Checker

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2.1.5.3.4 Spellex

2.1.5.4 AMH does not support or endorse any specific add-on software.

2.1.5.5 Users are encouraged to consult with agency technology support staff before installing any software.

2.1.6 OWITS does work with dictation software.

2.1.6.1 Configure the dictation software to work with Internet Explorer.

2.1.6.2 Once configured, OWITS will accept dictation.

2.2 Users are required to have access to an email address.

2.2.1 This email address should be individual (business or personal), not shared with anyone else.

2.2.2 It is recommended that this email address be readily accessible from most Internet connections.

3.0 Training and Production Work Environments

3.1 Training

3.1.1 The Training environment of OWITS is used for training new users, testing new features or functions, verifying error correction steps, etc.

3.1.2 "Dummy data" is found throughout the OWITS Training environment.

3.1.3 Actual client information or other information about real people should not be entered into the Training environment except on a temporary or experimental basis.

3.1.3.1 Any client data will be considered inaccurate and unprotected, and it may be used for demonstration, training, or testing purposes.

3.1.4 Billing information entered into the Training environment will not result in any financial transactions.

3.1.5 OWITS system administrators may not be automatically notified when support tickets are submitted through the Training environment.

3.1.5.1 Users who submit support tickets (see 10.5) through the Training environment for actual problems (not just for testing purposes) should also notify OWITS system administrators by phone or email (see 10.4).

3.2 Production

3.2.1 The Production environment is the "real" or "live" version of OWITS.

3.2.2 Data entered is considered accurate and protected.

3.2.3 DO NOT enter "dummy data" in the Production environment.

3.2.4 DO NOT change existing data in the Production environment unless correcting, updating, or adding to records.

3.2.5 Billing information entered into the Production environment may result in financial transactions.

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4.0 Logging In

4.1 Establish or verify an Internet connection.

4.1.1 A connection to the Internet is required to use OWITS.

4.1.2 Wi-Fi (wireless) Internet connections can be used, but users who connect to the Internet by Wi-Fi to use OWITS *may* encounter additional difficulties not present using wired connections.

> **BEST PRACTICES**
> **Limited or Unreliable Connectivity**
> Using an internet connection that frequently drops, reconnects, or slows down abruptly?
> - Save as often as possible.
> - Enter text into a Word document, then copy and paste it into OWITS (work can more easily be saved this way, and it allows for spelling and grammar checks as well).
> - Have OWITS System Administrators create a second account just for resetting passwords and unlocking accounts.
>
> - Justin, AMH

4.1.2.1 If the computer disconnects from the Wi-Fi network, the computer's IP address may be reset.

4.1.2.2 If the computer's IP address is reset while the user is still logged into OWITS, an error will occur which locks the user's access rights.

4.1.2.2.1 This is part of a security feature which prevents users from logging into a single OWITS account from multiple computers at the same time.

4.1.2.3 To resolve this, contact an OWITS system administrator (see 10.2).

4.2 Open Microsoft Internet Explorer as the web browser.

4.3 Enter the URL of the OWITS work environment appropriate for the data which will be viewed, entered, or modified (see 3.1 and 3.2).

4.3.1 To access the Training environment, enter the following URL:

4.3.1.1 https://or-training.witsweb.org/

4.3.2 To access the Production environment, enter the following URL:

4.3.2.1 https://or.witsweb.org/

4.3.3 When logging in, or when entering any data, first verify the OWITS environment using one or more of the following three methods:

4.3.3.1 URL: The Training environment includes the word "training" in its URL; the Production environment does not.

4.3.3.2 Logo: In the upper left corner of the screen is the OWITS logo, which is accompanied by the word "training" in the Training environment.

4.3.3.3 Properties: Right-click on any blank portion of the screen and select properties; the dialogue box will display the word "training" if in the Training environment.

4.4 OWITS requires a user ID and two passwords.

4.4.1 The user ID is created by the OWITS system administrators and local agency administrators.

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4.4.1.1 A user ID generally consists of the user's first initial and last name.

4.4.1.1.1 Example: Elizabeth Jones = ejones

4.4.1.2 If a user ID already exists for another user with the same last name and a similar first name, then the user's middle initial may be added.

4.4.1.2.1 Example: Elizabeth K Jones = ekjones

4.4.1.3 If a user ID already exists for another user with the same last name and similar first and middle initials, or if the user has no middle initial, then a number may be added to the end of the user ID.

4.4.1.3.1 Example: Emily Jones = ejones2

4.4.1.4 All user IDs for the training environment will be followed by an underscore and the word "training."

4.4.1.4.1 Example: Elizabeth Jones = ejones_training

4.4.1.5 User IDs will match between work environments.

4.4.1.5.1 Example: Elizabeth K Jones (Production) = ekjones

4.4.1.5.2 Example: Elizabeth K Jones (Training) = ekjones_training

4.4.1.6 User IDs are limited to a maximum of 20 characters.

4.4.1.6.1 User IDs that exceed 20 characters in the Production environment may be abbreviated as appropriate to the user's name.

4.4.1.6.2 User IDs that exceed 20 characters in the Training environment may have the *_training* extension shortened to *_trn* instead.

4.4.2 The first password is called a password.

4.4.3 The second password is called a PIN.

4.4.4 Both passwords and PINs are case sensitive and, for security purposes, should consist of letter and number combinations with a minimum of six characters.

4.5 Users will receive user IDs and their initial passwords and PINs by email from their OWITS administrators, usually from the noreply@witsweb.org email address.

4.6 When first logging in, users will be prompted to change their passwords and PINs.

4.6.1 In the following login steps, users may find it easier to copy and paste their initial password and PIN from the email text instead of typing it.

4.6.1.1 To copy:

4.6.1.1.1 Highlight the desired text.

4.6.1.1.2 Right-click on the desired text and select "Copy" or press CTRL + C.

4.6.1.2 To paste:

4.6.1.2.1 Click in the place where the copied text will be pasted.

4.6.1.2.2 Right-click in the desired location and select "Paste" or press CTRL + V.

4.6.2 Log in using the password received by email.

4.6.2.1 Enter the user ID in the field labeled "User ID."

4.6.2.2 Enter the password in the field labeled "Password."

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4.6.2.3 Click "Go."

4.6.3 A screen will appear prompting for a password change.

4.6.4 In the field labeled "Current Password", enter the password received by email.

4.6.5 In the field labeled "New Password", enter a desired new password.

4.6.5.1 This must be entered again in the field labeled "Confirm New Password" for confirmation.

4.6.6 Click "Save."

4.6.7 A screen will appear prompting for a PIN change.

4.6.8 In the field labeled "Current PIN", enter the PIN received by email.

4.6.9 In the field labeled "New PIN", enter a desired new PIN.

4.6.9.1 This must be entered again in the field labeled "Confirm New PIN" for confirmation.

4.6.10 Click "Save."

4.7 When first logging in, users will also be prompted to create a security question.

4.7.1 Choose a security question from the drop-down menu.

4.7.2 Enter an answer to that question in the text box.

4.7.2.1 This field is not case-sensitive.

4.7.3 Click "Save."

4.8 After successfully logging into OWITS at least once, users can reset their own passwords and PINs.

4.8.1 To reset passwords and PINs, enter a user ID at the login screen.

4.8.2 Click the "Forgot your Password/PIN?" link and follow the prompts.

4.8.2.1 Enter the answer to the security question and click "Go."

4.8.2.2 A new password and PIN will be sent to the email address associated with the user ID provided.

4.8.2.3 Repeat the steps for changing the initial password as described in 4.6.1 through 4.6.10.

4.9 After the log-in process, the Home Page or the Change Facility screen will display.

4.9.1 Users with access to a single facility in a single agency will be directed to their facility's Home Page screen.

4.9.2 Users with access to multiple agencies and/or facilities will be directed to select an agency and facility.

4.9.2.1 Use the "New Agency" drop-down menu to select an agency in which work will be performed.

4.9.2.1.1 The agency selected will determine which facilities are available.

4.9.2.1.2 For most users, only one agency will be available.

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4.9.2.2 Use the "New Facility" drop-down menu to select a facility in which work will be performed.

4.9.2.2.1 The facility selected will determine which records will be available

4.9.2.2.2 The user's access rights determine which client records can be accessed or viewed (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs and Staff Records).

4.9.2.2.3 Records of clients enrolled to facilities other than the one selected will display only partial information and will have limited edit access.

4.9.2.3 Click "Go."

4.10 In both Training and Production environments, user logins will expire after 120 minutes of inactivity.

4.10.1 Should this occur, users will need to log in again.

4.10.2 Any unsaved data will be lost.

5.0 Navigation

5.1 OWITS is a web-based application.

5.2 The various screens within the system will function in much the same way as a website.

5.2.1 Most links will appear underlined.

5.2.2 The mouse cursor will change when it touches any link, usually from an arrow to a pointing hand.

5.3 To change screens or to update some displayed information, OWITS will load a new page or reload the existing page.

5.3.1 When a screen is loading, the entire OWITS window will be temporarily overlaid with a light shade of gray.

5.3.1.1 In some versions of Internet Explorer, the entire screen will become gray.

5.3.1.2 In some versions of Internet Explorer, the current OWITS display will still be visible but momentarily inaccessible.

5.3.2 No buttons, menus, or links can be clicked during the loading process.

5.3.3 Loading or reloading typically takes 1-2 seconds.

5.3.4 Loading or reloading can be triggered by:

5.3.4.1 Clicking a link in the Navigation View (5.4), in the Actions column of a table, in a column header, etc.

5.3.4.2 Clicking a button (see 5.5) such as Cancel, Save, Finish, Go, etc.

5.3.4.3 Selecting an option in some drop-down menus.

5.3.4.4 Entering data in some fields, especially date fields.

5.4 On the left side of the screen is the blue Navigation View or Navigation Pane.

5.4.1 The Navigation View has a "tree" layout similar to that used in Windows Explorer.

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5.4.1.1 For an outline of the locations of the headings and subheadings in the Navigation View, see Appendix C – Navigation Map.

5.4.1.2 A white arrow next to any heading in the Navigation View indicates that the heading has subheadings.

5.4.1.2.1 If the white arrow is pointing down, the subheadings are currently displayed.

5.4.1.2.2 If the white arrow is pointing to the right, the subheadings are hidden.

5.4.1.2.2.1 Hidden subheadings will only display when the heading is clicked or when another function opens a page within the heading.

5.4.1.2.2.2 Some headings will not expand until certain data entry requirements have been met.

5.4.1.2.3 A dotted white outline will appear around the selected heading or subheading, indicating the screen currently displayed.

5.4.1.3 In reference manuals, training manuals, and other documentation, the standard for designating Navigation View subheadings is the greater-than symbol (>).

5.4.1.3.1 Example: The location of one of the assessment tools within the client profile would be identified by the following:
Client List > Activity List > Assessments > ASI Lite

5.4.2 Headings and subheadings that appear in the Navigation View are controlled by user access levels and agency treatment domains.

5.4.2.1 Some subheadings or entire headings will be available to some users and not to others.

5.4.2.1.1 Example: A clinician may have access to the Assessments screens where a lab technician does not.

5.4.2.1.2 Example: A lab technician may have access to Drug Testing screens where a clinician does not.

5.4.2.1.3 Access levels are set and modified by OWITS system administrators (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records).

5.5 In addition to links, OWITS uses several buttons for navigating through client records and other data.

5.5.1 Blue Arrows

5.5.1.1 If a dataset involves a series of screens (such as the Client Profile), blue arrows will appear in a lower section of the screen.

5.5.1.2 The arrow pointing left navigates to the previous screen in the series.

5.5.1.2.1 If this arrow is not present, the first screen in the series is currently displayed.

5.5.1.3 The arrow pointing right navigates to the next screen in the series.

5.5.1.3.1 If this arrow is not present, the final screen in the series is currently displayed.

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5.5.1.4 These arrows will not save entered data to the record.

5.5.1.4.1 Using the arrows without saving will not cause any data to be lost unless a system error occurs during page navigation.

5.5.1.4.2 An error message may appear prompting the user to save (see 5.5.3).

5.5.2 Cancel

5.5.2.1 This button appears on most screens into which data can be entered.

5.5.2.2 It will clear any entered data, reject changes, and return to first screen in the series or to the current module's table or search screen.

5.5.2.2.1 Some screens always assume that data has been entered, in which case, the Cancel button can be used to navigate away from the current screen.

5.5.3 Save

5.5.3.1 This button appears on most screens into which data can be entered.

5.5.3.2 It will save any entered data to the record and perform an error check.

5.5.3.2.1 If a Warning appears (see 6.2.3.2), the data has saved successfully.

5.5.3.2.2 If an Error appears (see 6.2.3.3), the data has not saved.

5.5.3.3 Save will not navigate to any other screen.

5.5.3.4 Use this button often!

5.5.3.4.1 Because OWITS is a web-based system, it does not have any automatic save features.

5.5.3.4.2 If the Internet connection is lost, if the power fails, if the browser window is closed, or if the login expires, data entered will be lost if it has not been saved.

5.5.4 Finish

5.5.4.1 This button appears on most screens into which data can be entered.

5.5.4.2 It performs a save function similar to the Save button (see 5.5.3).

5.5.4.3 If no errors are found, it will navigate to the first screen in the series or to the screen from which the series was accessed (such as a page of search results).

5.5.4.3.1 If a Warning appears (see 6.2.3.2), the data has saved successfully.

5.5.4.3.2 If an Error appears (see 6.2.3.3), the data has not saved.

5.5.5 Go

5.5.5.1 This button acts as an execute command, performing searches or applying a selection or change.

5.5.5.2 Some screens will not display any data or data entry fields until the Go button is clicked.

5.5.6 Clear

5.5.6.1 This button appears on most screens with search functionality.

5.5.6.2 It deletes all search criteria entered into the search field text boxes and returns all drop-down menus to default settings.

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5.5.7 On Screen

5.5.7.1 When OWITS is capable of generating reports, this button will display the report in OWITS or in a pop-up browser window.

5.5.8 Export

5.5.8.1 When OWITS is capable of generating reports, this button will create a document that can be saved.

5.5.8.1.1 To export a report, hold down the CTRL key and click the Export button.

5.5.8.1.1.1 Do not release the CTRL key until the export process is complete.

5.5.8.1.1.2 The CTRL key is used in this process to bypass pop-up filters and other Internet Explorer security functions that may not have been previously disabled and that would otherwise disrupt OWITS.

5.5.8.1.2 A pop-up browser window may appear.

5.5.8.1.3 A dialogue box will appear asking, "Do you want to open or save this file?"

5.5.8.1.4 Click "Open" to view the file in a pop-up window without saving it.

5.5.8.1.4.1 Release the CTRL key.

5.5.8.1.4.2 Close the pop-up window when finished.

5.5.8.1.5 Click "Save" to save a copy of the file to the computer.

5.5.8.1.5.1 A "Save As" dialogue box will appear.

5.5.8.1.5.2 Release the CTRL key.

5.5.8.1.5.3 Select the location to which the file will be saved.

5.5.8.1.5.4 If desired, change the file name.

5.5.8.1.5.5 Click "Save".

5.5.8.1.5.6 The file can now be opened and modified as needed.

5.5.8.1.6 Click "Cancel" to stop this process and return to the current OWITS screen.

5.6 The top display bar contains additional information and links.

5.6.1 The OWITS or OWITS Training logo is a link that leads to the Home Page of the agency and facility currently selected.

5.6.1.1 Home Page shows Announcements, Alerts, and Schedules relevant to the agency selected and to the current user.

5.6.1.2 To view the details of an Announcement, click the "Review" link in the Actions column of the Announcements table.

5.6.1.2.1 The full text and details of the announcement will display.

5.6.1.2.2 Click the Cancel button to return to the Home Page.

5.6.1.2.3 For instructions regarding creating announcements, see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records.

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5.6.1.3 To perform an action associated with an Alert, click the "Review" link in the Actions column of the Alert List table.

5.6.1.3.1 OWITS will navigate the page where relevant data may need to be entered or changed.

5.6.1.3.2 Enter or modify data as needed (see other OWITS reference manuals for details).

5.6.1.3.3 When finished, return to the Home Page by clicking on the OWITS logo or the "Home Page" link in the Navigation View.

5.6.1.3.4 For instructions regarding creating alerts, see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records.

5.6.1.4 To view all active alerts, click the "See All in Agency" link in the Alert List heading.

5.6.1.4.1 A full list of all active alerts will display.

5.6.1.4.2 For instructions on using and modifying data in this list, see OWITS Reference Manual, Volume 13: Tier 1 System Administration.

5.6.1.5 The Schedule For table can be used to view scheduled appointments for the current user.

5.6.1.5.1 For instructions regarding creating and modifying appointments, see OWITS Reference Manual, Volume 4: Client Profile.

5.6.2 To the right of the OWITS logo is the Locator.

5.6.2.1 The Locator is a user, agency, and client record status display.

5.6.2.2 This acts like a "You Are Here" map.

5.6.2.3 The User line displays the name of the user currently logged in.

5.6.2.4 The Loc line displays the agency and facility currently selected.

5.6.2.4.1 This line may be blank until an agency and a facility are selected.

5.6.2.4.2 The agency and facility selected may determine what data is visible.

5.6.2.4.3 These are often referred to as the "context" agency and/or facility.

5.6.2.5 The Client line displays the ID number and name of the client whose record is currently active.

5.6.2.5.1 This line will be blank until a client's record is selected.

5.6.2.5.2 Data entry and other activity will affect the record of the client displayed on this line unless another client is selected (see OWITS Reference Manual, Volume 4: Client Profile).

5.6.3 In the center of the top display bar are two print functions.

5.6.3.1 The "Generate Report" button appears when reports are available.

5.6.3.1.1 Click this button to view a printable report.

5.6.3.1.2 The report generally appears as a PDF in a pop-up window.

5.6.3.1.3 The report can be saved or printed from the pop-up window.

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5.6.3.1.4 Use the Adobe PDF print and save icons (not the Internet Explorer print or save functions) to print or save the PDF.

5.6.3.2 The "Printable View" button appears on most OWITS screens.

5.6.3.2.1 Click this button to open a printable image of the contents of the current screen.

5.6.3.2.2 Screen contents such as drop-down menus are still functional, but changes will not affect OWITS records, and Save and Finish buttons will have no effect.

5.6.3.2.3 The screen can be printed from the pop-up window using the Internet Explorer print functions.

5.6.3.2.4 The "Printable View" pop-up window can also be useful as a reference when comparing records or when entering the same data to multiple screens.

5.6.4 OWITS contains a link to the MedLine Plus website: http://www.nlm.nih.gov/medlineplus/

5.6.4.1 This link appears toward the right side of the top display bar.

5.6.4.2 MedLine Plus is a website maintained by the United States National Library of Medicine and the National Institutes of Health.

5.6.4.3 This website can be used as a resource for additional medical and health information.

5.6.5 In the upper right corner of the top display bar is a month and year indicating the most recent update to the OWITS system.

5.6.5.1 OWITS is generally updated once each month.

5.6.5.2 Updates are applied to the Training environment first, tested, and then applied to the Production environment.

5.6.5.3 The Training environment is generally updated up to one month ahead of the Production environment.

5.6.6 In the lower right corner of the top display bar is the Logout link (see 9.0).

5.7 Most OWITS data displays (other than search fields and data entry fields) appear as tables with a blue title bar, several columns, and at least three rows.

5.7.1 Each column has a header.

5.7.1.1 If a column header is underlined, the values in the column can be sorted.

5.7.1.2 Click the header once to sort the values in that column in ascending order (lowest or earliest value first, such as A-Z and 0-9).

5.7.1.3 Click the header a second time to sort the values in that column in descending order (highest or latest value first, such as Z-A and 9-0).

5.7.1.4 Dated records generally have a default setting that sorts them by date, placing the most recent record either at the top or bottom of the table.

5.7.2 The Action column, if present, may contain links and commands.

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5.7.2.1 Common Action column items include Delete, Edit, Review, and so on.

5.7.2.2 Action column items are specific to each table and to the data displayed.

6.0 Data Entry

6.1 OWITS utilizes several types of data entry.

6.1.1 Drop-Down Menus

6.1.1.1 Click the downward pointing arrow.

6.1.1.2 Locate and click on the desired option.

6.1.1.3 These can be considered "multiple-choice" questions with only one possible answer.

6.1.2 Searchable Drop-Down Menus

6.1.2.1 Type the first few letters of the desired selection.

6.1.2.2 Click the magnifying glass next to the field.

6.1.2.3 If the desired selection does not automatically populate, click the downward pointing arrow.

6.1.2.4 Locate and click on the desired option.

6.1.3 Text Boxes

6.1.3.1 Click inside the box and begin typing.

6.1.3.2 Single-line boxes have character limits generally equal to the visible space within the text box.

6.1.3.2.1 Single-line text boxes may also have format requirements.
Example: Dates must be entered as MM/DD/YY or MM/DD/YYYY

6.1.3.3 In multi-line boxes, scroll bars and arrows will appear if the text entered exceeds the visible space within the text box.

6.1.4 Option Transfer Boxes

6.1.4.1 This consists of a pair of boxes side-by-side.

6.1.4.2 Items transfer from one side to the other by use of arrow buttons between the boxes.

6.1.4.2.1 Click on desired items in one box.

6.1.4.2.1.1 Hold the CTRL key while clicking to select more than one item at a time.

6.1.4.2.1.2 Hold the SHIFT key while clicking to select a range of items.

6.1.4.2.2 Click the arrow pointing to the other box.

6.1.4.2.3 Selected items will then be removed from one box and added to the other.

6.1.4.3 The left box always contains the available options.

6.1.4.4 The right box always contains the selected options.

6.2 OWITS provides information to users by messages and color-coding.

6.2.1 Data entry fields may appear in different colors:

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6.2.1.1 White: Optional

6.2.1.1.1 It is not necessary to enter data in these fields.

6.2.1.1.2 Users should always enter as much data as possible.

6.2.1.2 Yellow: Required

6.2.1.2.1 These fields cannot be left blank.

6.2.1.2.2 OWITS cannot complete certain functions without this data.

6.2.1.2.3 If yellow fields are blank, other data on the same screen will not save, or search functions will not work.

6.2.1.2.4 It is necessary to fill these fields in order to meet system requirements or state or federal regulations.

6.2.1.3 Pale Yellow: Reporting

6.2.1.3.1 These fields should not be left blank.

6.2.1.3.2 If the pale yellow fields are blank, other data on the same screen will save, but the record will be incomplete.

6.2.1.3.3 It is necessary to fill these fields in order to meet some state and federal reporting requirements.

6.2.1.4 Orange: Missed

6.2.1.4.1 These are yellow or pale yellow fields that were left blank when the user attempted to navigate away from the screen.

6.2.1.4.2 The orange color indicates that a required field was not filled.

6.2.1.4.3 Enter data into these fields and click Save or Finish, or click Cancel to abandon all changes.

6.2.1.5 Gray: Locked or Read-Only

6.2.1.5.1 Data entry into these fields is not allowed.

6.2.1.5.2 These fields contain read-only data or are not available.

6.2.1.5.3 Some read-only fields will become available under certain conditions.

6.2.2 Hover text (also known as “Tool Tips”) provides additional information to aid in data entry.

6.2.2.1 Hover text appears in a floating box that appears over some data entry fields (usually single-line text boxes) and some links.

6.2.2.1.1 Place the mouse cursor over the data field or link for approximately 1.5 seconds to see the hover text.

6.2.2.1.2 Hover text will disappear when the mouse is moved, when the OWITS window is no longer active, or after five seconds, whichever occurs first.

6.2.2.2 Hover text often contains tips about number formatting (such as acceptable date formats) or explanations about the data field.

6.2.3 Three types of system messages may appear near the top of the screen.

6.2.3.1 Notifications are informational messages.

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6.2.3.1.1 A notification appears with an icon of a letter *i* within a blue speech bubble.

6.2.3.1.2 Notifications offer useful information but do not require immediate action.

6.2.3.2 Warnings indicate a potential problem.

6.2.3.2.1 A warning appears with an icon of an exclamation mark within a yellow triangle.

6.2.3.2.2 Warnings are typically caused by missing data.

6.2.3.2.3 Warnings do not require immediate action, but ignoring them could cause problems later.

6.2.3.2.4 In most cases, entered data will still save to the record in spite of warning messages.

6.2.3.3 Errors indicate definite problems.

6.2.3.3.1 An error appears with an icon of a letter X within a red square.

6.2.3.3.2 Errors may be caused by missing data, incorrect data formats, conflicting data, or other issues.

6.2.3.3.3 Errors require immediate attention.

6.2.3.3.4 Entered data will not save to the record until the error is resolved.

6.2.3.3.5 Confusing or technical errors should be reported to an OWITS system administrator (see 10.4).

6.2.4 Significant system problems are represented by a "yellow screen" error.

6.2.4.1 A yellow screen error is preceded by a blue OWITS screen and a message indicating that the system encountered an error.

6.2.4.1.1 To view the yellow screen error (which contains technical details about the system error), click the "More Information" link.

6.2.4.1.2 It may be helpful to save a copy of the yellow screen text (by copying it to Word, by creating a PDF from it, or by printing it) for creating a support ticket later (see 10.5).

6.2.4.2 Yellow screen errors are rare and usually indicate problems that can only be resolved by Tier 3 support (see 10.1.3).

6.2.4.3 Some yellow screen errors are incidental and may be resolved by going back to the previous screen.

6.2.4.3.1 To go back to the previous screen from a yellow screen error, press Backspace or right-click anywhere in the OWITS window and select the "Back" command.

6.2.4.3.2 An Internet Explorer error ("Webpage has expired") will appear.

6.2.4.3.3 Press the F5 key.

6.2.4.3.4 A dialogue box will appear.

6.2.4.3.5 Click the "Retry" button to reload the page.

6.2.4.3.6 Unsaved data may be lost.

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6.2.4.3.7 This solution may not work in all yellow screen situations.

6.3 Historical records are automatically kept within OWITS.

6.3.1 Records include:

6.3.1.1 User login attempts.

6.3.1.2 Record views.

6.3.1.3 Record changes.

6.3.1.4 Other data changes.

6.3.2 The OWITS server is located in the Eastern time zone, and all time stamps in the historical data records of the Training environment will display accordingly.

6.3.3 For instructions regarding how to access these historical records, see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records.

7.0 Changing Settings and Active Records

7.1 Users that have access rights to multiple agencies or facilities can change from one agency or facility to another.

7.1.1 Click the My Settings heading in the Navigation View.

7.1.2 Click the Change Facility subheading in the Navigation View.

7.1.3 Use the New Agency drop-down menu to select the desired agency.

7.1.4 Use the New Facility drop-down menu to select the desired facility.

7.1.5 Click the Go button.

7.1.6 The record status display (or "Locator") at the top of the page will change to reflect the new agency and facility.

7.1.6.1 A client previously selected will be unselected unless that client's record is or has been active in both the previous facility and the new facility.

7.2 For instructions on changing or clearing active client records, see OWITS Reference Manual, Volume 4: Client Profile.

8.0 Search Functionality and Search Results

8.1 OWITS contains various search sections that allow users to locate and access data.

8.2 Search sections contain data entry fields, usually single-line text boxes and drop-down menus.

8.2.1 Users may enter search criteria into any number of data entry fields.

8.2.1.1 Yellow fields must be filled for a search to function correctly.

8.2.1.2 More fields filled will result in a narrower search.

8.2.1.3 Fewer fields filled will result in a wider search.

8.2.2 Some search screens will return all available results if no search fields are filled.

8.3 Wildcards are allowed but are not automatic.

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8.3.1 Use a question mark (?) to stand for a single character.

8.3.1.1 Example: A client's first name might be spelled Catherine or Katherine.
Search for: ?atherine

8.3.1.2 Example: A client's last name might be Hansen or Hanson.
Search for: Hans?n

8.3.1.3 Example: A client's first name might be Kacey or Casey.
Search for: ?a?ey

8.3.1.4 Example: A client's first name might by Brian or Byron.
Search for: B???n

8.3.2 Use an asterisk (*) to stand for one or more characters.

8.3.2.1 Example: A client's first name might be Steven or Stephen.
Search for: Ste*en

8.3.2.2 Example: A client's first name might be Sue, Susan, or Suzanne.
Search for: Su*

8.3.3 Wildcards cannot be used in fields with specific format requirements.

8.3.3.1 Example: Searching for a client's date of birth with wildcards will result in an error message stating, "The field(s) in red contain invalid queries."

8.4 Single date fields can be used to search for date ranges.

8.4.1 Some search screens include both a "Start Date" and an "End Date" field which can be used to search for records within a specified date range.

8.4.2 Some search screens include only one date field, which can be used to search for single dates or date ranges.

8.4.2.1 Enter a single date in the standard date format.
Example: In a "Created Date" field, enter "05/02/2012" to search only for records that were created and saved on May 2, 2012.

8.4.2.2 Enter a date range with a specific beginning and a specific end by entering two dates separated by a colon.
Example: In a "Created Date" field, enter "05/02/2012:05/30/2012" to search for records created and saved on or between May 2, 2012, and May 30, 2012.

8.4.2.3 Enter a date range with an infinite beginning and a specific end by entering a less than symbol (<), followed by a date.
Example: In a "Created Date" field, enter "<05/02/2012" to search for records created and saved any time on or *prior to* May 2, 2012.

8.4.2.4 Enter a date range with a specific beginning and an infinite end by entering a greater than symbol (>), followed by a date.
Example: In a "Created Date" field, enter ">05/02/2012" to search for records created and saved any time on or *after* May 2, 2012.

8.5 Click "Go" to display search results.

8.5.1 Search results will not display automatically.

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8.5.2 Search results can be sorted.

8.5.3 If search results extend beyond the viewable area of the screen, scroll bars and arrows will appear.

8.5.4 If the search returns more than 1,000 results, OWITS will not display the results and will request more specific search criteria.

8.6 When returning to the search screen after viewing a record (usually by clicking "Finish" or "Cancel"), the results from the most recent search will reappear.

8.6.1 Modify the search criteria as needed to perform another search and click the "Go" button.

8.6.2 To reset all search criteria fields to their default values, click the "Clear" button.

9.0 Logging Out

9.1 To leave the OWITS system, click Logout in the lower right corner of the top display bar.

9.1.1 OWITS will confirm the logout command.

9.1.1.1 Click Yes to complete the process and exit the system.

9.1.1.2 Click No to return to the agency Home Page.

9.1.1.3 Unsaved data may be lost.

9.2 If a user closes OWITS without logging out and attempts to log in again on a different computer, or if a user loses or disconnects a Wi-Fi connection, his or her account will be locked.

9.2.1 To unlock an account, contact an OWITS administrator (see 10.210.4).

10.0 Help

10.1 OWITS support is provided in three tiers.

10.1.1 Tier 1: OWITS system administrators at provider agencies and facilities ("local administrators").

10.1.2 Tier 2: OWITS system administrators at AMH ("system administrators," "OWITS Support," and "OWITS Help Desk").

10.1.3 Tier 3: OWITS database administrators at the WITS vendor (FEi).

10.1.4 For detailed descriptions of each tier, see Appendix A – Definitions of OWITS Support Tiers.

10.2 For most issues, first contact Tier 1 support.

10.2.1 If Tier 1 support can resolve the problem, it does not need to be reported to Tier 2.

10.2.2 If Tier 1 support cannot resolve the problem, then the user or the Tier 1 support staff can escalate the problem to Tier 2.

10.3 For issues not resolvable by Tier 1 support, contact Tier 2.

10.4 Issues, errors, and requests can be reported to Tier 2 support by phone, email, the OWITS Forum, or the OWITS Support Ticket module (see 10.5.3).

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10.4.1 Email address: owits.support@state.or.us

10.4.2 Phone numbers:

10.4.2.1 Justin King – (503) 945-7821

10.4.2.2 Janelle Jegglie – (503) 947-5535

10.4.3 OWITS Forum: http://boards.owits.net

10.4.4 If Tier 2 support cannot resolve the problem, they will escalate the problem to Tier 3.

10.5 Submitting Support Tickets

10.5.1 Log into the OWITS Production environment (see 4.3.2 and 4.0).

10.5.1.1 It is not recommended that users submit Support Tickets through the Training environment (see 3.1.5).

10.5.2 If necessary, select an agency and facility (see 4.9).

10.5.3 In the Navigation View, click Support Ticket.

10.5.4 In the blue bar labeled "Support Ticket List," click the "Add New Support Ticket" link.

10.5.5 Complete the required fields and any others as needed.

10.5.5.1 *Support Ticket ID*

10.5.5.1.1 This field will automatically populate.

10.5.5.1.2 The Support Ticket ID is a number, automatically generated by OWITS, that identifies the support ticket within the system.

10.5.5.2 *Work Item No*

10.5.5.2.1 This field will automatically populate after the ticket has been escalated to Tier 3 support.

10.5.5.2.2 The Work Item Number is a number generated by FEi that identifies possible changes or corrections to be made to OWITS in their internal work tracking system.

10.5.5.3 *Status*

10.5.5.3.1 This field will automatically populate.

10.5.5.3.2 "Pending User" indicates that the support ticket is not yet complete.

10.5.5.3.3 "Pending WITS Admin" indicates that the support ticket has been submitted to Tier 2 support.

10.5.5.3.4 "Submitted" indicates that the support ticket has been submitted to FEi for additional investigation and possible resolution.

10.5.5.3.5 "Active" indicates that the support ticket has been submitted to Tier 2 or Tier 3 support and that a system administrator at one of those tiers has added resolution notes (see 10.5.8.2.7).

10.5.5.3.6 "Resolved" indicates that the error or problem described in the support ticket has been addressed and/or corrected to the satisfaction of the OWITS system administrators.

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10.5.5.4 *Support Ticket Type*

10.5.5.4.1 Select the option that best describes the reason for submitting the support ticket.

10.5.5.4.2 "Account Administration" should be used for password and PIN problems, email address changes, staff employment or assignment changes, and other related problems.

10.5.5.4.3 "Error / Bug" should be used for problems with the OWITS system such as error messages, yellow screen errors (6.2.4), spelling or grammar errors within the text, unusual system behavior, or other problems that prevent users from entering or viewing data as needed.

10.5.5.4.3.1 This is the only support ticket type that will be escalated to Tier 3.

10.5.5.4.4 "Suggestions / Other Feedback" should be used to request modifications to OWITS such as adding, removing, or modifying values in drop-down menus, changing the behavior of some screens or modules, or adding new features.

10.5.5.4.5 "System Performance / Connectivity" should be used when OWITS is not producing errors but is not behaving as it normally does, possibly exhibiting unusually long screen loading times or search results delays.

10.5.5.4.5.1 If the problem exists at the OWITS server, this support ticket type may be changed to "Error / Bug" and submitted to Tier 3.

10.5.5.4.6 "WITS Navigation / Training" should be used for help finding a specific tool or module in OWITS or to request additional training from Tier 1 or Tier 2 support staff.

10.5.5.5 *Agency*

10.5.5.5.1 Use the drop-down menu to select the agency from which the ticket will be submitted.

10.5.5.5.2 This selection will also determine which clients are available in the Client Name field (see 10.5.5.9).

10.5.5.6 *Facility*

10.5.5.6.1 After selecting an agency, use the drop-down menu to select the facility from which the ticket will be submitted.

10.5.5.6.2 This selection will also determine which clients are available in the Client Name field (see 10.5.5.9).

10.5.5.7 *End User*

10.5.5.7.1 Use this field to identify the name of the user who originally reported the error, suggestion, or other items to be addressed in the support ticket.

10.5.5.7.2 Type the first few letters of the user's *last name* and click the magnifying glass to the right of the field.

10.5.5.7.3 OWITS will search the system records for users whose last names match the letters entered.

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10.5.5.7.3.1 If one matching user record is found, the name will automatically appear.

10.5.5.7.3.2 If multiple matching users are found, use the resultant drop-down menu to select the correct user.

10.5.5.8 *Contact Email*

10.5.5.8.1 After selecting an End User, this field will automatically populate with the user's email address as recorded in his or her staff profile (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records).

10.5.5.8.2 If necessary, change the email address to the user's preferred address or to an alternate address.

10.5.5.9 *Client Name*

10.5.5.9.1 After selecting an agency, this field will become available.

10.5.5.9.2 Complete this field if the support ticket is related to an error or problem with a specific client record.

10.5.5.9.3 Type the first few letters of the client's *last name* and click the magnifying glass to the right of the field.

10.5.5.9.4 OWITS will search the agency records for clients whose last names match the letters entered.

10.5.5.9.4.1 If one matching client record is found, the name will automatically appear.

10.5.5.9.4.2 If multiple matching client records are found, use the resultant drop-down menu to select the correct client.

10.5.5.10 *Unique Client No*

10.5.5.10.1 When a client name is selected, this field will automatically populate.

10.5.5.10.2 For security purposes, if the support ticket is submitted to FEi, the client's name will be automatically removed, and only the "Unique Client No" will be visible to Tier 3 support staff.

10.5.5.11 *Specific Screen(s) Involved*

10.5.5.11.1 Enter the name of the screen on which the error or problem was encountered.

10.5.5.11.2 Whenever possible, use the standard designation for Navigation View headings and subheadings (see 5.4.1.3).

10.5.5.11.3 If no specific screen is involved, if the specific screen is unknown, or if multiple screens are involved that make the description too long for the field, enter a general description of where the error or problem occurred.

10.5.5.11.4 Note that this field will also become the title of the Support Ticket.

10.5.5.12 *Specific Field(s) Involved*

10.5.5.12.1 If a specific data field is related to the error or problem, enter the name of it here.

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10.5.5.12.2 If no specific data field is related to the error or problem, enter "None" or "N/A" or similar.

10.5.5.13 *Button/Action Link Involved*

10.5.5.13.1 If a specific button (such as "Finish") or link (such as "Edit" or "Review") is related to the error or problem, enter the name of it here.

10.5.5.13.2 If no specific button or link is related to the error or problem, enter "None" or "N/A" or similar.

10.5.5.14 *Occurrence Date*

10.5.5.14.1 Enter the date on which the error or problem was first encountered.

10.5.5.14.2 This date may be estimated.

10.5.5.15 *Occurrence Time*

10.5.5.15.1 Enter the time of day at which the error or problem was first encountered.

10.5.5.15.2 This time may be estimated.

10.5.5.16 *Description*

10.5.5.16.1 Provide a detailed description of the problem.

10.5.5.16.2 Be as specific as possible without divulging sensitive client information.

10.5.5.16.3 If an error message was associated with the error or problem, it may be helpful to quote it here.

10.5.5.17 *Steps to Reproduce*

10.5.5.17.1 For OWITS system administrators and FEi support staff to reproduce the error or problem, describe the steps taken just before it occurred.

10.5.5.17.2 If the reproduction steps are unknown, or if this has already been described in the "Description" field above, enter "See above."

10.5.5.18 *Does this happen every time in the same situation?*

10.5.5.18.1 For an error or problem that occurs often but not every time, select "Yes" if it does occur more often than it does not occur.

10.5.5.19 *Is there a yellow screen error associated with this problem?*

10.5.5.19.1 A yellow screen indicates a significant OWITS system error (see 6.2.4).

10.5.5.20 *Are you experiencing problems accessing or working with other pages on the web?*

10.5.5.20.1 The response will help OWITS system administrators determine whether the error or problem is related to OWITS or to other computer functions (Internet access, network security, etc.).

10.5.6 When the required fields are complete, click Save.

10.5.7 An automated email notification that the ticket has been created will be sent from noreply@feinfo.com to the email address associated with the user who created the ticket.

10.5.8 The Support Ticket will expand to allow additional data entry.

10.5.8.1 *Add Attachments*

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10.5.8.1.1 If additional information is available in a separate file or document (such as a screen shot), use this function to add it.

10.5.8.1.1.1 In most computers, to create a "screen shot" of an error or problem, press the "Print Screen" or "Prt Sc" key when the error or problem is visible on the screen.

10.5.8.1.1.2 Open a program that accepts images, such as Microsoft Paint or Microsoft Word.

10.5.8.1.1.3 Press CTRL+V or open the Edit menu and click Paste.

10.5.8.1.1.4 Save the image (in a .jpg or .bmp format) or document (in the .doc format).

10.5.8.1.2 Click the "Browse" button.

10.5.8.1.3 A "Choose File" window will appear.

10.5.8.1.4 Navigate through computer folders to find where the file or document was saved.

10.5.8.1.5 Click the name of the file to be uploaded.

10.5.8.1.5.1 A single file cannot be larger than 4 MB.

10.5.8.1.6 Click Open.

10.5.8.1.7 The name of the file or document will appear under the "Add Attachments" field.

10.5.8.1.7.1 These files are pending and will be uploaded.

10.5.8.1.7.2 To remove an attachment before it is uploaded, click the small blue *x* next to the file name.

10.5.8.1.8 Continue the process described in 10.5.8.1.2 through 10.5.8.1.7 above until all the relevant files are listed.

10.5.8.1.8.1 The total size of all attached files cannot be larger than 10 MB.

10.5.8.1.9 When all files are ready to be uploaded, click Save.

10.5.8.2 Other fields will appear that will be usable by OWITS system administrators at all three tiers, including:

10.5.8.2.1 *Priority*

10.5.8.2.2 *Admin Notes*

10.5.8.2.2.1 Notes added by Tier 1 or Tier 2 system administrators to provide additional clarity to Tier 2 or Tier 3 system administrators, respectively, if the support ticket is escalated.

10.5.8.2.3 *Are other users experiencing this problem?*

10.5.8.2.4 *Were you able to reproduce the problem?*

10.5.8.2.5 *Reviewed By*

10.5.8.2.6 *Reviewed Date*

10.5.8.2.7 *Signed Resolution Notes*

10.5.8.2.7.1 Notes added by system administrators to indicate any progress made toward resolving the problem described in the support ticket.

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10.5.8.2.8 *Unsigned Resolution Notes*

10.5.8.2.9 *Resolved By*

10.5.8.2.10 *Resolved Date*

10.5.8.3 OWITS system administrators at all tiers may add resolution progress into the additional fields, providing users with updates as the errors, suggestions, or requests are addressed.

10.5.8.4 Users may view the support ticket at any time (see 10.6).

10.5.9 When all of the required and supplemental information has been added to the support ticket, submit the ticket to OWITS system administrators.

10.5.9.1 In the Administrative Actions bar at the bottom of the screen, click the "Submit to WITS Admin" link.

10.5.9.2 A support ticket is not considered submitted and OWITS system administrators will not be aware of this ticket until the "Submit to WITS Admin" link is clicked.

10.5.10 An automated email will be sent to OWITS system administrators.

10.5.11 If necessary, Tier 2 support will escalate the ticket to Tier 3 support.

10.6 Reviewing Existing Support Tickets

10.6.1 In the Navigation View, navigate to Support Ticket.

10.6.2 In the Support Ticket Search section, enter search criteria to find the desired ticket(s).

10.6.2.1 *Support Ticket ID*

10.6.2.1.1 Enter a support ticket number to search for (see 10.5.5.1).

10.6.2.2 *Work Item Number*

10.6.2.2.1 Enter a work item number to search for (see 10.5.5.2).

10.6.2.3 *Created Date*

10.6.2.3.1 This field searches for the date on which the support ticket was originally created.

10.6.2.3.2 A date range can be searched in this field by entering the earliest date to be searched and the latest date to be searched, separated by a colon.

10.6.2.4 *Status*

10.6.2.4.1 Select the status of the support ticket to search for (see 10.5.5.3).

10.6.2.5 *Reporting User*

10.6.2.5.1 Type the first few letters of the user's *last name* and click the magnifying glass to the right of the field.

10.6.2.5.2 OWITS will search for users whose last names match the letters entered.

10.6.2.5.2.1 If one matching user profile is found, the name will automatically appear.

10.6.2.5.2.2 If multiple matching users are found, use the resultant drop-down menu to select the correct client.

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10.6.2.6 *Support Ticket Type*

10.6.2.6.1 Select the type of support ticket to search for (see 10.5.5.4).

10.6.2.7 *Agency*

10.6.2.7.1 Select the name of the agency from which the support ticket was submitted (see 10.5.5.5).

10.6.2.8 *End User*

10.6.2.8.1 Select the name of the user affected by the support ticket (see 10.5.5.7).

10.6.3 Click Go.

10.6.4 In the Support Ticket List section, locate the desired ticket.

10.6.5 Click the "Review" link in the Actions column.

10.6.6 The Support Ticket will display.

10.6.6.1 Tickets with a status "Pending User" or "Pending WITS Admin" can be edited.

10.6.6.2 Tickets with a status "Submitted" or "Resolved" cannot be edited.

10.6.7 To remove an attached file, click the "Delete" link in the Actions column.

10.6.8 To view an attached file, click the "Download" link in the Actions column.

10.6.8.1 A dialogue box will appear asking "Do you want to open or save this file?"

10.6.8.2 Click "Open" to view the file.

10.6.8.3 Click "Save" to save it to the computer for viewing later.

10.7 Using the OWITS Forum

10.7.1 The OWITS Forum is designed to function as a hub for communication between OWITS administrators at AMH and OWITS users at provider agencies.

10.7.2 To access the OWITS Forum, open a web browser and enter the following URL: http://owits.boards.net

10.7.2.1 The OWITS forum tends to work best in Mozilla Firefox.

10.7.3 Follow the prompts to create a user account.

10.7.4 Once approved, users at provider agencies have access to the forum and can make posts or comments regarding upcoming changes, proposed changes, bugs, support questions, and a variety of other topics.

11.0 System Modification

11.1 OWITS is an open-source program.

11.2 Operating OWITS is a collaborative effort between the state and the individual provider agencies and facilities.

11.3 Modifications can be made to OWITS if the need arises.

11.4 To suggest or request changes, contact the OWITS support team.

11.4.1 The OWITS support team may be reached by phone or email (see 10.4).

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11.4.2 For specific requests for changes in the OWITS system, complete and submit an OWITS support ticket (see 10.5) with the appropriate Support Ticket Type (see 10.5.5.4) to Tier 2 support.

11.4.3 Any other system changes can be discussed on the OWITS Forum (10.7.2).

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Appendix A – Definitions of OWITS Support Tiers

Tier 1 This is the first contact for provider agency users who need assistance with technical problems or use of the OWITS EHR.

Tier 1 is located at the provider agency level. OWITS EHR contacts at AMH are *not* involved in Tier 1 support. Users contact the system administrator(s), trainer(s), business analyst(s), or other designated staff member(s) within the provider agency for help resolving the problem.

Tier 1 support includes staff training, managing access to OWITS EHR, and password/PIN maintenance.

In addition, provider agencies are expected to resolve all technical issues related to desktop computers and/or Internet connectivity. Agencies are expected to identify and resolve user questions about or problems with: using the OWITS EHR software, agency business processes, policies and/or procedures in relation to the use of OWITS EHR, and user access issues such as registering new users and resetting passwords.

Tier 2 A designated person from the provider agency contacts AMH through the use of the Support Ticket module for assistance in solving problems related to OWITS EHR not resolvable by Tier 1 personnel.

The Support Ticket screen should be filled out completely in order to reduce unnecessary email and phone follow-up. Screen shots are helpful and can be added to the ticket. These types of issues might include such things as error messages that cannot be resolved by the user, unresponsive screens, and unusual screen or system behavior.

Tier 2 support will be available 8:00 a.m. – 5:00 p.m., Monday through Friday, excluding federal and state holidays and state-required unpaid furlough days. Urgent matters may be addressed by email (owits.support@state.or.us) or by phone call to OWITS EHR support personnel.

Tier 3 AMH contacts FEi using the OWITS EHR Support Ticket module to resolve technical issues not resolvable by Tier 2 personnel.

Tier 3 is the highest level of technical competence and support and will be involved if issues are determined to be technically complex, have a system-wide impact, represent significant system problems or defects, or are issues with a critical impact on AMH or the provider agencies. AMH maintains a contract with FEi that describes exactly how FEi is expected to respond to and resolve Tier 3 issues when reported. AMH, at its sole discretion, decides if and when to report an issue to FEi for assistance.

Provider agencies are *not* permitted to escalate an issue to Tier 3.

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Appendix B – OWITS Reference Manual Volume Titles

- *OWITS Reference Manual, Volume 1: OWITS Basics*
- OWITS Reference Manual, Volume 2: Client Records Overview
- OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records
- OWITS Reference Manual, Volume 4: Client Profile
- OWITS Reference Manual, Volume 5: Client Activity and Contact
- OWITS Reference Manual, Volume 6: Screenings and Assessments
- OWITS Reference Manual, Volume 7: Groups and Group Notes
- OWITS Reference Manual, Volume 8: Consent and Referrals
- OWITS Reference Manual, Volume 9: Client Discharge
- OWITS Reference Manual, Volume 10: Running Reports
- OWITS Reference Manual, Volume 11: Billing
- OWITS Reference Manual, Volume 12: Troubleshooting
- OWITS Reference Manual, Volume 13: Tier 1 System Administration
- OWITS Reference Manual, Volume 14: Tier 2 System Administration
- OWITS Reference Manual, Volume 15: AMH Policies for OWITS Records and Users

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Appendix C – Navigation Map

A map of the navigation pane links can be found here (OWITS Navigation Map).
Due to its size, printing this document is **not** recommended.

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Revision History

Revised By	Date	Description
Justin D. King	May 3, 2012	Reference manual created.
Justin D. King	June 25, 2012	Revision History table added.
Justin D. King	July 3, 2012	Updated details related to the Support Ticket module.
Justin D. King	October 12, 2012	A date field was changed to no longer populate with the current date.
Justin D. King	December 20, 2012	Added "Browsing History" instructions, modified revision explanation, added a Best Practices box, corrected an error explaining the Navigation View, added date search instructions, added notes regarding IE spell check options.
Justin D. King	February 13, 2013	Noted compatibility with dictation software.
Justin D. King	July 10, 2013	Added instructions for displaying mixed content in Internet Explorer and references to the OWITS Forum.
Justin D. King	December 17, 2013	Updated links and references. Added link to Navigation Map.

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