OWITS Reference Manual

Volume 3

Agencies, Facilities, Programs, and Staff Records

Revision 1-4

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Description

Before a provider agency can serve clients and track their progress in OWITS, certain record structures must be in place. This includes the agency, facility, program, and staff profiles. This manual describes the processes involved in creating and modifying these records.

Purpose

To detail the steps that must be followed by state OWITS system administrators to create provider agencies and to provide instructions to agency administrators for creating and modifying facilities, programs, and staff records.

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.
- ASAM: American Society of Addiction Medicine – a professional organization of physicians with a goal for improving the quality of addiction treatment and prevention. In OWITS, the term "ASAM" is also used to refer to the assessment tool developed and sponsored by the American Society of Addiction Medicine and the resultant level of care determinations.
- ATR: Access to Recovery – A federal grant funded by SAMHSA which provides vouchers to clients for the purchase of substance abuse clinical treatment and support services.
- 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."
- CADC: Certified Alcohol and Drug Counselor – a certification for alcohol and drug counselors, usually consisting of multiple levels that reflect the holder's education and training.
- 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
- CPR: Cardiopulmonary Resuscitation – an emergency procedure performed in an effort to manually preserve intact brain function until normal blood circulation and breathing are restored. A license or certificate for performing CPR is granted to qualified individuals.
- 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.
- 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.
- EDI: Electronic Data Interchange – the process by which OWITS communicates with other databases and record systems, exporting required data from OWITS records into a text file that can be imported into other programs. This can also be considered a file transfer process.
- EHR: Electronic Health Record – computer software designed to track data regarding the demographics and treatment of patients.

- EIN: Employer Identification Number – also known as a Federal Tax Identification Number, this is issued by the Internal Revenue Service and is used to identify a business entity.
- Environment: A subdivision of the overall OWITS system containing all available aspects of the program but resulting in 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.
- GPRA: Government Performance and Results Act – a law enacted in 1993 designed to improve government project management. In OWITS, GPRA also refers to a data collection tool to evaluate substance abuse treatment and prevention.
- Heading / Subheading: The title of an OWITS module or of divisions and screens within OWITS modules. See also *Module*.
- I-SATS: A national inventory of substance abuse treatment facilities maintained by SAMHSA in cooperation with the states; the source of national data on the number and location of substance abuse treatment facilities. An I-SATS number is assigned to substance abuse treatment facilities to assist in tracking I-SATS data.
- 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.
- MH: Mental Health – an abbreviation commonly used within OWITS for mental health treatment, services, treatment domain, etc.
- Module: A smaller component of a larger system.
- MU: Meaningful Use – criteria by which EHR developers evaluate their products and programs to determine whether useful data is collected and available within the system. Meaningful Use criteria, certification, and funding are all part of a work in progress with an expected completion date in 2016.
- 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.
- NPI: National Provider Identifier – A unique 10-digit identification number issued to health care providers in the United States by the Centers for Medicare and Medicaid Services (CMS).
- NOMS: National Outcomes Measurement System – A data collection system developed to evaluate the efficacy of services to provided to adults and children with disorders related to mental health.
- 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.
- SA: Substance Abuse – an abbreviation commonly used within OWITS for substance abuse treatment, services, treatment domain, etc.
- SAMHSA: Substance Abuse and Mental health Services Administration – an agency of the U.S. Department of Health and Human Services which serves to focus attention, programs, and funding on improving the lives of people with or at risk for mental health and substance abuse disorders.
- Screen: A specific informational view that can be displayed in OWITS at one time.
- SSRS: SQL Server Reporting Services – report generation software used, in this case, to compile data from OWITS and produce customized reports.
- Substance Abuse Matrix: A grid of fields within OWITS used to capture a client's top three problematic addictive substances, the degree of use, and other related information.
- Table: A grid of information with rows of information divided into categorical columns.
- TEDS: Treatment Episode Data Set – A data collection system developed by SAMHSA to store data collected by states in monitoring their individual substance abuse treatment systems.
- Text Box: A bordered square or rectangle in a web page into which users can type text.
- Treatment Domain: A designation in OWITS client records that separates some client information based on the type of treatment or service administered.
- TX: An abbreviation for "treatment" often used in OWITS.
- URL: Uniform Resource Locator – a string of characters that constitute a reference to an Internet resource, such as a file or web page.
- URS: Uniform Reporting System – A data collection system of tables and performance measures used by SAMHSA to compile and generate reports on mental health performance measures.
- User: A person who interacts with the OWITS system.
- 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.
- 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.

1.0 OWITS Provider Record Structure

1.1 Each treatment or service provider organization using OWITS is assigned an "Agency" record.

1.1.1 The Agency record contains data about the provider as an organization and its staff members as well as billing, alerts, and Meaningful Use data.

1.2 Within the Agency record, "Facility" records denote specific locations for treatment or service.

1.3 Within the Facility records, "Programs" describe sets of structured activities or steps that a client completes as part of his or her treatment or service.

1.4 For an illustration of the hierarchy of these records in OWITS, see Appendix A – Agency, Facility, and Program Record Structure.

1.5 Client information is unique to each agency.

1.5.1 Client records may be shared across agencies through a consent (release of information) or a referral.

1.5.2 Client records may not be completely transferred from one agency to another.

1.5.3 Client information may be shared between facilities through a consent (release of information).

1.5.4 Client records may be transferred from one facility to another (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

1.6 Note that not all of the modules available in OWITS will be visible to all users.

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

2.0 Order of Operations

2.1 Certain data elements in some portions of the agency, facility, staff, and program records cannot be completed until data has been added to other portions of these records.

2.2 The instructions in sections 3.0, 4.0, 5.0, and 6.0 describe entering data in the order suggested by the headings and subheadings in the Navigation Pane.

2.3 To avoid error messages and potentially frustrating loops of data entry, the following order of operations is provided for a relatively streamlined process of creating a new agency, its facilities, programs, and staff.

2.3.1 Agency > Agency List > Agency Profile (see 3.2.5)

2.3.2 Agency > Agency List > Agency Profile > Addresses / Phone (see 3.2.6.2 and 3.2.6.3)

2.3.3 Staff List > Staff Profile (see 6.5)

2.3.3.1 Complete only the Staff Profile screen; the remaining staff information screens will be completed in a later step.

2.3.3.2 Begin with the staff member with the highest level of responsibility (the person to whom all or most other staff members will report), such as a manager or director.

2.3.3.3 Continue to add staff members (completing only the Staff Profile screen) in descending order of staff members' levels of authority or responsibility.

2.3.3.4 To avoid errors, complete the fields *outside* the blue "Taxonomy" box first and *inside* the blue "Taxonomy" box last.

2.3.4 Agency > Agency List > Aliases (see 3.5)

2.3.5 Agency > Agency List > Contacts (see 3.6)

2.3.6 Agency > Agency List > Governance (see 3.7)

2.3.7 Facility List > Facility Profile (see 4.2.5)

2.3.7.1 Complete this screen for all facilities to be added to the agency.

2.3.7.2 Additional facilities may be added later, but adding as many known and active facilities as possible at this step will reduce the time spent on future modifications to staff records.

2.3.8 Facility List > Facility Profile > Addresses (see 4.2.6.1 and 4.2.6.2)

2.3.8.1 Complete this screen for all facilities added to the agency.

2.3.9 Agency > Agency List > Relationships (see 3.8)

2.3.10 Staff List > Staff Assignment (see 6.5.7)

2.3.10.1 The Facilities section should be completed at this step.

2.3.10.2 The Programs section cannot be completed at this step.

2.3.11 Facility List > Facility Profile > Contacts (see 4.4)

2.3.12 Facility List > Facility Profile > Special Services (see 4.5)

2.3.13 Facility List > Facility Profile > Addiction Services (see 4.6)

2.3.14 Facility List > Facility Profile > Operating Hours (see 4.7)

2.3.15 Agency > Agency List > Referrals (see 3.9)

2.3.16 Facility List > Facility Profile > Programs (see 5.2.6)

2.3.17 Staff List > Contact Info (see 6.5.6)

2.3.18 Staff List > Staff Assignment (see 6.5.7)

2.3.18.1 The Facilities section should have been completed prior to this step.

2.3.18.2 The Programs section can now be completed.

2.3.19 Staff List > Staff Language (see 6.5.8)

2.3.20 Staff List > Staff Qualifications (see 6.5.9)

2.3.21 Staff List > Account Information (see 6.5.10)

3.0 Agency Records

3.1 New agencies can only be created by OWITS system administrators at AMH.

3.1.1 New agencies can only be created from the Administrative Agency.

3.2 To create a new agency:

3.2.1 In the Navigation View, navigate to Agency > Agency List.

3.2.2 A list of all agencies currently available in OWITS to which the user has access will appear.

3.2.2.1 Unless sorted by a specific column, inactive agencies appear at the bottom of the list.

3.2.2.2 An inactive agency has a date entered in the "Inactive Date" field on the Agency Profile screen (see 3.2.5.8) and is no longer accepting clients or providing treatment or services.

3.2.3 Browse the agency list to determine whether the agency to be created already exists.

3.2.3.1 If the agency already exists, DO NOT create a new agency.

3.2.3.1.1 Agency records cannot be deleted.

3.2.3.1.2 Click the "Review" link in the Actions column to view or modify the agency records.

3.2.3.2 If the agency does not exist, create a new agency.

3.2.4 Click the "Add New Agency Record" link in the Agency List heading.

3.2.5 Complete the required fields on the Agency Profile screen. (Return: 2.3.1)

3.2.5.1 *Agency Name*

3.2.5.1.1 Include the full name of the agency as it appears on the organization's business license or other legal documentation.

3.2.5.1.2 To ensure valid data reporting and to make it possible for OWITS system administrators to provide prompt assistance, verify that the agency name is accurate and correctly spelled.

3.2.5.1.3 This is the name of the agency as a whole.

3.2.5.1.3.1 For example, a non-profit organization called For The People has offices in Salem, Eugene, Portland, and Bend; its agency name would be:
For The People

3.2.5.1.4 Agency names must not be names of an individual person unless accompanied by that person's credentials or business licensure.

3.2.5.1.4.1 For example, David Wilder is a social worker with a doctorate degree who operates a small private practice; his agency's name could be one of the following:
Dr. David Wilder, Ph.D., LCSW
David Wilder Counseling, LLC

3.2.5.1.5 The agency name is limited to 60 characters, including spaces.

3.2.5.2 *Display Name*

3.2.5.2.1 Some OWITS records and reports display an abbreviated version of the agency name.

3.2.5.2.2 This field will automatically populate with the first fifteen (15) characters entered into the Agency Name field above.

3.2.5.2.3 This field may be edited to contain any desired abbreviated agency name as long as it does not exceed fifteen (15) characters, including spaces.

3.2.5.3 *Start Date*

3.2.5.3.1 This is the date on which the agency will first enter or accept client records in OWITS.

3.2.5.3.2 This date is generally the date on which the agency profile is created, but individual provider needs may necessitate a different date.

3.2.5.3.3 Client records cannot be created prior to the date in this field.

3.2.5.3.3.1 It is expected that relevant data for old, concluded treatment episodes will be on record in the state CPMS database, so entering a historical date is typically not necessary.

3.2.5.3.3.2 If a provider wishes to enter client records into OWITS for clients who began receiving treatment or services prior to the date of the creation of the agency profile, this date must be on or before the earliest date in the client records to be added.

3.2.5.3.3.3 AMH recommends that this date should be no more than five years prior to the date the agency record is created, so only clients who were admitted for a treatment or service episode *on or after* five years prior would be entered into OWITS (*not* clients who were receiving active treatment *as of* five years prior and have since concluded treatment).

3.2.5.3.3.4 If the client with the earliest "open" date *first* began receiving treatment or services at an agency on January 1, 2009, then the agency Start Date would be 01/01/2009.

3.2.5.3.3.5 If the client with the earliest "open" date has been receiving services since October 10, 1998, but was most recently re-admitted on February 2, 2010, then the agency start date would be 02/02/2010 (*not* 10/10/1998).

3.2.5.4 *Govt Organization*

3.2.5.4.1 Indicate whether the agency being created is a branch of national, state, county, or city government.

3.2.5.4.2 This specification does not include organizations that are regulated or operated by national, state, county, or city government—only the governmental organizations themselves.

3.2.5.4.3 Most agencies that provide treatment or services will not fit this classification.

3.2.5.5 *Parent Agency*

3.2.5.5.1 This field indicates whether the agency is a sub-agency of another.

3.2.5.5.2 Parent and subordinate agency functionalities are not currently used in OWITS.

3.2.5.5.3 This field should be left blank.

3.2.5.6 *DBA*

3.2.5.6.1 The agency's "Doing Business As" name.

3.2.5.6.2 If the agency as a whole operates under multiple names and conducts its business under a name other than the one entered in the Agency Name field, enter that name in this field.

3.2.5.6.3 The "Doing Business As" name applies to agencies that conduct business under a name that is different from the legal name of the organization or people who own and are responsible for the financial and business activities of the organization.

3.2.5.7 *Agency Type*

3.2.5.7.1 Select the option that best describes the agency.

3.2.5.7.2 Some agency type options include multiple forms of treatment or service.

3.2.5.7.3 Select "Single State Agency" only for contracting agencies.

3.2.5.7.4 Select any of the ATR options or "Recovery Management Center" only if the agency can claim funds from the Access to Recovery grant and provides qualifying services.

3.2.5.7.5 Due to potential system complications, new agency types will only be added to this list by AMH in cases where existing agency types are completely unacceptable.

3.2.5.8 *Inactive Date*

3.2.5.8.1 This date indicates the day on which the agency closed, stopped accepting clients, stopped providing treatment or services, or stopped using OWITS for capturing and reporting data.

3.2.5.8.2 Client records of any kind cannot be created with dates that occur after the date in this field.

3.2.5.8.3 Services cannot be provided on dates that occur after the date in this field.

3.2.5.8.4 Agency users will still have access to agency records after this date.

3.2.5.9 *Consumer Rep Met*

3.2.5.9.1 Indicate whether the agency has met its requirement for consumer representation in advisory committees or councils.

3.2.5.10 *URL*

3.2.5.10.1 If the agency has a website, enter its address here.

3.2.5.10.2 It is recommended that this field contain the full web address, including the "http://" or "https://" prefix.

3.2.5.11 *Agency Features*

3.2.5.11.1 Select the descriptions that best fit the agency's business purposes.

3.2.5.11.2 In the current functionality of OWITS, most agencies will select "Service Provider" as the only agency feature.

3.2.5.12 *Contract Role*

3.2.5.12.1 Select "Provider" if the agency being created provides treatment or services to clients.

3.2.5.12.1.1 The majority of agencies will fall under this classification.

3.2.5.12.2 Only AMH will select "Contractor" in this field in conjunction with Contract Management (see 8.10).

3.2.5.12.3 The option selected in this field will affect contract settings within OWITS related to this agency.

3.2.5.13 *National Provider ID*

3.2.5.13.1 Enter the agency's NPI in this field.

3.2.5.13.2 The NPI must be ten (10) digits in length.

3.2.5.13.3 This field is specifically for the *agency's* NPI (hospital, treatment center, laboratory, etc.).

3.2.5.13.4 DO NOT enter an individual person's NPI in this field unless the person's NPI matches the agency's NPI.

3.2.5.13.5 An agency NPI is required for billing and the creation of 837 files.

3.2.5.14 *Federal Tax ID*

3.2.5.14.1 Enter the agency's federal tax identification number in this field.

3.2.5.15 *State Business ID*

3.2.5.15.1 Enter the agency's state business identification number in this field.

3.2.5.16 *Contractor / Locator*

3.2.5.16.1 This field is not currently used in OWITS.

3.2.5.16.2 It should be left blank.

3.2.5.17 *County*

3.2.5.17.1 Select the Oregon county in which the agency's headquarters or corporate offices are located.

3.2.5.17.2 If the agency is headquartered outside of Oregon, select the county in which the agency's most senior managerial offices are located.

3.2.5.17.3 OWITS does not currently allow agencies located completely outside Oregon.

3.2.5.18 *Tribe*

3.2.5.18.1 If the agency is associated with any of Oregon's tribes of Native Americans, select the tribe in this field.

3.2.5.18.2 If the agency's tribe is not listed, please contact the OWITS system administrators at AMH (owits.support@state.or.us).

3.2.5.19 *Agency Faith Based*

3.2.5.19.1 Indicate whether the agency offers faith-based or other religious treatment or services.

3.2.5.19.2 This includes agencies operated by churches or other religious organizations.

3.2.5.20 *Comments*

3.2.5.20.1 Enter a general description of the agency or important public details in this field.

3.2.5.20.2 Text from this field will display in the Description column of the Agency List screen (see 3.2.2).

3.2.5.20.3 If possible, limit the contents of this field to fewer than 100 characters.

3.2.5.21 *Pseudo Agency*

3.2.5.21.1 This field's functionality is currently used only by OWITS system administrators at AMH and FEi.

3.2.5.21.2 For all provider and contract agencies, select "No" in this field.

3.2.5.22 *Senate Dist*

3.2.5.22.1 This field's functionality is not currently used in OWITS.

3.2.5.22.2 It should be left blank.

3.2.5.23 *House Dist*

3.2.5.23.1 This field's functionality is not currently used in OWITS.

3.2.5.23.2 It should be left blank.

3.2.5.24 *Cong Dist*

3.2.5.24.1 This field's functionality is not currently used in OWITS.

3.2.5.24.2 It should be left blank.

3.2.5.25 *Domains*

3.2.5.25.1 Select the treatment domain descriptions that best fit the treatments and services offered by the agency.

3.2.5.25.2 The treatment domain(s) selected will determine which client record modules will be available to agency staff, what types of data can be captured, and what data is reported to the state.

3.2.5.25.3 Select "ATR" *only* if the agency can claim funds from the Access to Recovery grant, provides qualifying services, and has an approved ATR contract with AMH.

3.2.5.25.3.1 The ATR Coordinator at AMH will set up ATR agency records.

3.2.5.25.4 Select "Substance Abuse" *only* if the agency provides treatment or services to clients for their substance addictions.

3.2.5.25.5 Select "Mental Health" *only* if the agency provides treatment or services to clients for their mental health problems.

3.2.6 When all the required fields have been filled (and others if possible), click the right arrow to advance to the Addresses screen.

3.2.6.1 Do not include facility addresses and phone numbers in the agency profile unless they are the same.

3.2.6.1.1 An agency may also be a facility.

3.2.6.2 To add an address, click the "Add Address" link in the blue "Addresses" bar. (Return: 2.3.2)

3.2.6.2.1 Add an address by completing the address fields in the Address Information section of this screen.

3.2.6.2.2 At least one address must be selected to complete an agency profile.

3.2.6.2.3 An address with an Address Type of "Agency Billing" must be entered before the agency can submit billing records.

3.2.6.2.4 Only one address can be recorded for each Address Type.

3.2.6.2.5 Select "Yes" in the Confidential field to hide the address from OWITS users at other agencies.

3.2.6.2.6 When the address has been entered, click Finish to return to the Addresses screen.

3.2.6.3 To add a phone number, click the "Review" link in the Actions column of an existing address. (Return: 2.3.2)

3.2.6.3.1 A phone number cannot be entered without an address.

3.2.6.3.2 The phone number entered must be associated with the address selected.

3.2.6.3.2.1 Example: If the address selected is for an office in Medford, do not enter a phone number for a treatment location in Coos Bay (treatment locations are facilities, and individual facility phone numbers can be added in the facility setup 4.2.6.2).

3.2.6.3.3 Click the "Add Phone" link in the "Phone Numbers" bar.

3.2.6.3.4 Select the type of phone number.

3.2.6.3.5 Enter the number

3.2.6.3.5.1 OWITS will automatically format any ten digit number to the standard long-distance phone number format:
(503) 555-1234

3.2.6.3.6 Enter the extension, if applicable.

3.2.6.3.7 When the phone number has been entered, click Finish.

3.2.6.4 When the address and its associated phone number(s) have been entered, click Finish to return to the Addresses screen.

3.2.7 When all the addresses and phone numbers for the *agency* have been entered, click Finish to return to the Agency List screen.

3.2.8 The agency profile is now complete and should appear in the Agency List.

3.2.8.1 The whole agency record is not yet complete (see 3.5).

3.3 To view the profile, addresses, or phone numbers of an existing agency, locate it in the Agency List and click the "Review" link in the Actions column.

3.3.1 Agency records can be modified as needed by OWITS system administrators.

3.3.2 Reviewing an agency profile will change the active agency in the Locator at the top of the screen (see OWITS Reference Manual, Volume 1: OWITS Basics).

3.4 Some users with access to records in multiple agencies (such as OWITS system administrators) will be able to search for agency records.

3.4.1 Access the agency search screen.

3.4.1.1 This can be done one of two ways:

3.4.1.1.1 Click the "Add New Agency Record" link in the blue Agency List bar.

3.4.1.1.2 Click the "Review" link in the Actions column for any existing agency.

3.4.2 Without changing any of the existing fields or adding any new data, click the Search button.

3.4.3 The Agency Profile search screen will appear.

3.4.3.1 Most of the search fields will match the data entry fields for an agency profile, but only the Treatment Domain field will be required.

3.4.3.2 The right arrow will not navigate to any new screen.

3.4.4 Enter search criteria for the desired agency or agencies.

3.4.4.1 Wildcards can be used in most text fields.

3.4.4.2 At least one treatment domain must be selected.

3.4.4.3 Selecting multiple treatment domains will result in a broader search.

3.4.5 Click Go.

3.4.6 Agencies matching the search criteria will be displayed on the Agency List screen.

3.4.7 To view the agency profile and other records, click the "Review" link in the Actions column.

3.4.7.1 Reviewing an agency profile will change the active agency in the Locator at the top of the screen (see OWITS Reference Manual, Volume 1: OWITS Basics).

3.4.8 To recover the complete list of agencies that normally appears on the Agency List screen, click the "Agency" link in the Navigation View.

3.5 If needed, add information to the Agency > Agency List > Aliases screen (Return: 2.3.4).

3.5.1 An alias is a historical name by which the agency has previously been known in OWITS.

3.5.2 Agency Aliases are automatically created.

3.5.2.1 When the Agency Name field (see 3.2.5.1) is changed and the agency profile is saved, an alias record is created.

3.5.2.2 If an agency's name has changed since the initial creation of the agency's profile in OWITS, the previous name(s) will appear on this screen.

3.5.2.3 If the agency's name was entered incorrectly, saved, and later corrected, the erroneous name will appear on this screen.

3.5.3 To create an Agency Alias record, change the entry in the Agency Name field on the Agency Profile screen (see 3.2.5.1) and click Save.

3.5.4 Explanations and other notes can be added to alias records.

3.5.4.1 Click the "Add Comment" link in the Actions column.

3.5.4.2 Enter any desired information into the text box under the blue bar labeled Comments.

3.5.4.3 Click Save.

3.6 If needed, add information to the Agency > Agency List > Contacts screen (Return: 2.3.5).

3.6.1 This screen displays staff members recorded for the agency with specific contact roles.

3.6.1.1 To record staff members as agency contacts, staff profiles must first be created (see 2.3.3 and 6.5).

3.6.2 To add an agency contact, click the "Add Contact" link in the lower blue bar.

3.6.3 Complete the required fields.

3.6.3.1 *Staff*

3.6.3.1.1 Select the name of the staff member to be added as an agency contact.

3.6.3.1.2 If the staff member's name is not available, verify that he or she has a staff profile created (see 6.5.3).

3.6.3.1.3 A staff member may be selected for multiple contact types.

3.6.3.2 *Contact Type*

3.6.3.2.1 Select the description that best fits the type of contact role to be held by the selected staff member.

3.6.3.2.2 Select "Agency Billing Contact" if the staff member will be entering client payment records and will be responsible for using the OWITS billing modules.

3.6.3.2.3 Select "Agency EDI Contact" if the staff member will be responsible for electronic data interchange records and functions, such as submitting to AMH or MMIS.

3.6.3.2.4 Multiple staff members may be assigned to the same contact type except "Agency EDI Contact."

3.6.3.3 *Effective Date*

3.6.3.3.1 Enter the date on which the staff member began working as the selected contact type or the earliest date of the earliest record for which the selected staff member will need to access as part of this role.

3.6.3.3.2 The selected staff member will not be able to create billing transactions or EDI transmissions for records dated prior to this date.

3.6.3.4 *Status*

3.6.3.4.1 Select "Active" if the selected staff member is currently working in this contact role.

3.6.3.4.2 Select "Inactive" if the selected staff member is not currently working in this contact role (because he or she is on an extended leave, has concluded work with the agency, has changed positions within the agency, etc.).

3.6.3.5 *Manager Name*

3.6.3.5.1 This field will automatically populate after the contact is saved.

3.6.3.5.2 The name that appears in this field is the name of the contact person's manager as recorded in his or her Staff Profile (see 6.5.5.18).

3.6.4 Click Finish to return to the Agency List screen.

3.7 If needed, add information to the Agency > Agency List > Governance screen (Return: 2.3.6).

3.7.1 The Governance section is used to identify members of a board of directors or any other overseeing body or individual.

3.7.2 To identify a member of a board of directors or other governance, click the "Add New Governance Record" in the Governance List.

3.7.3 Complete the required fields (and others, if possible).

3.7.3.1 *First Name*

3.7.3.1.1 Enter the person's first name or preferred first name.

3.7.3.2 *MI*

3.7.3.2.1 If applicable, enter the person's middle initial.

3.7.3.3 *Last Name*

3.7.3.3.1 Enter the person's last name.

3.7.3.4 *Gender*

3.7.3.4.1 Select the person's gender.

3.7.3.4.2 OWITS does not capture whether gender is in question, in transition, or has changed since birth.

3.7.3.5 *Title*

3.7.3.5.1 If applicable, enter the person's title (Mr., Mrs., Dr., etc.) or other name prefix.

3.7.3.6 *Role*

3.7.3.6.1 Select the option that best describes the person's role in the governance of the agency.

3.7.3.7 *Board Member Type*

3.7.3.7.1 Indicate whether the person is a part of an advisory or governing board or other governing body.

3.7.3.8 *Federal Tax ID*

3.7.3.8.1 If applicable, enter the person's federal tax identification number.

3.7.3.9 *Email*

3.7.3.9.1 Enter the person's email address.

3.7.3.9.2 The email address must fit the standard email address format: name@domain.com

3.7.3.10 *Start Date*

3.7.3.10.1 Enter the date on which the person first began his or her role in the governance of the agency.

3.7.3.11 *End Date*

3.7.3.11.1 Enter the date on which the person concluded his or her role in the governance of the agency.

3.7.4 To add an address, click the "Add Address" link in the blue "Addresses" bar.

3.7.4.1 Add an address by completing the address fields in the Address Information section of this screen.

3.7.4.2 Only one address can be recorded for each Address Type.

3.7.4.3 Select "Yes" in the Confidential field to hide the address from OWITS users at other agencies.

3.7.4.4 When the address has been entered, click Finish to return to the Governance Profile screen.

3.7.5 To add a phone number, click the "Review" link in the Actions column of an existing address.

3.7.5.1 A phone number cannot be entered without an address.

3.7.5.2 The phone number entered must be associated with the address selected.

3.7.5.3 Click the "Add Phone" link in the "Phone Numbers" bar.

3.7.5.4 Select the type of phone number.

3.7.5.5 Enter the number

3.7.5.5.1 OWITS will automatically format any ten digit number to the standard long-distance phone number format.

3.7.5.6 Enter the extension, if applicable.

3.7.5.7 When the phone number has been entered, click Finish.

3.7.6 When the address and its associated phone numbers have been entered, click Finish to return to the Governance Profile screen.

3.7.7 Click Finish to return to the Governance List.

3.7.8 Existing governance records can be modified by clicking on the "Review" link in the Actions column.

3.8 If needed, add information to the Agency > Agency List > Relationships screen (Return: 2.3.9).

3.8.1 The Relationships section displays how one agency relates to other agencies within OWITS and any data that may be shared between or among them.

3.8.2 To view any agencies identified as "parent" or "child" agencies (see 3.2.5.5) in relation to the current agency, navigate to Agency > Agency List > Relationships > Collaborative.

3.8.2.1 A list of agencies, will be displayed.

3.8.2.1.1 Name: The name of the agency.

3.8.2.1.2 Description: The Agency Type (3.2.5.7).

3.8.2.1.3 Services Offered: The selected Agency Features (3.2.5.11).

3.8.2.2 To view the agency's profile, click the "Review" link in the Actions column.

3.8.2.2.1 The Agency Profile (3.2.5) for the selected agency will be displayed in a read-only format.

3.8.2.2.2 Click the right arrow to view the addresses and phone numbers (3.2.6) for the selected agency.

3.8.2.3 Most Oregon agencies will not use this function.

3.8.3 To view existing relationships in which the current agency has enabled the disclosure of information to other OWITS agencies or to enable such disclosure, navigate to Agency > Agency List > Relationships > Disclosure.

3.8.3.1 Use the Agency Name field on the Agency Disclosure Domain screen to determine which disclosure configurations will be displayed.

3.8.3.2 A list of agencies will be displayed.

3.8.3.2.1 Consents Granted By: The name of the agency that has enabled the disclosure of information, usually the current agency.

3.8.3.2.2 Consents Granted To: The name of the agency that has been selected as a potential recipient of disclosed information.

3.8.3.3 To add a disclosure configuration, click the "Add Agency Disclosure Domain Record" link in the blue Agency Disclosure Domain List bar.

3.8.3.3.1 Complete the fields as necessary to create the disclosure configuration.

3.8.3.3.2 Click Finish to return to the Agency Disclosure Domain screen.

3.8.3.3.3 For detailed instructions for creating disclosure configurations and enabling the ability to refer clients among agencies and facilities, see OWITS Reference Manual, Volume 8: Consent and Referrals.

3.8.3.4 To view an existing disclosure configuration, click the "Review" link in the Actions column.

3.8.3.4.1 The details of the disclosure configuration will be displayed.

3.8.3.4.2 These details may be modified as needed to adjust what types of information are disclosed, how, and to what OWITS agencies.

3.8.3.4.3 Click Cancel or Finish to return to the Agency Disclosure Domain screen.

3.8.3.4.4 For detailed instructions for modifying disclosure configurations, see OWITS Reference Manual, Volume 8: Consent and Referrals.

3.8.3.5 To remove an existing disclosure configuration, click the "Delete" link in the Actions column.

3.8.3.5.1 OWITS will confirm the delete command.

3.8.3.5.2 This action cannot be undone.

3.8.3.5.3 This action, if confirmed, will remove the ability to disclose information to the selected agency.

3.8.3.5.4 To restore the ability to disclose information to the selected agency, a new disclosure configuration must be created (see 3.8.3.3).

3.9 If needed, view and modify information on the Agency > Agency List > Referrals screen (Return: 2.3.15).

3.9.1 To view a list of clients who have been referred into an agency, navigate to Agency > Agency List > Referrals > Referrals In.

3.9.1.1 The blue area on the Referrals For screen contains a set of search criteria fields that can be used to display incoming or received referrals for the current agency and facility.

3.9.1.1.1 The current agency and facility are displayed in the Locator at the top of the screen.

3.9.1.1.2 The current facility is displayed in the page title.

3.9.1.1.3 To change the current agency and/or facility, navigate to My Settings > Change Facility.

3.9.1.2 Use the search criteria fields to locate the desired list of incoming or received referrals.

3.9.1.2.1 Referral Status Codes are used to describe the results of the referral (see 3.9.1.4.2.1 through 3.9.1.4.2.6).

3.9.1.2.2 Wildcards can be used in the Client ID, First Name, and Last Name boxes.

3.9.1.3 Click Go to display the search results.

3.9.1.3.1 A list of referred clients will be displayed.

3.9.1.4 To view the details of the referral or to accept or decline the referral, click the “Review” link in the Actions column.

3.9.1.4.1 The referral details will be displayed.

3.9.1.4.2 The referral can be accepted or declined using the Referral Status field.

3.9.1.4.2.1 Placed/Accepted: The referral has been accepted by the receiving agency, the client has been admitted to the receiving facility, and the client has been or will soon be enrolled in a program.

3.9.1.4.2.2 Referral Created/Pending: The referral is complete, but the receiving agency has not yet acknowledged receipt of it.

3.9.1.4.2.3 Referred Terminated: The referral has been retracted by the sending agency.

3.9.1.4.2.4 Refused Treatment: The referral has been accepted by the receiving agency, but the client refused treatment or services.

3.9.1.4.2.5 Rejected by Program: The referral has been received by the receiving agency, but the client was not admitted or enrolled due to lack of program availability or for not meeting treatment or service criteria.

3.9.1.4.2.6 Wait List: The referral has been accepted by the receiving agency, and the client has been placed on a waiting list for the appropriate program(s).

3.9.1.4.3 If the referred client is an ATR client, and if the current agency and facility qualify for the ATR grant and provide ATR services, the client's voucher can be viewed by navigating from this screen to Agency > Agency List > Referrals > Referrals In > Vouchers.

3.9.1.4.3.1 Vouchers are used exclusively by ATR providers.

3.9.1.4.3.2 Instructions for their use and management are provided in the ATR User Guides.

3.9.1.4.3.3 To obtain copies of the ATR User Guides, please contact the OWITS system administrators at AMH (owits.support@state.or.us).

3.9.1.4.4 Click Cancel or Finish to return to the Referrals For screen.

3.9.1.4.5 For detailed instructions for managing incoming and received referrals, see OWITS Reference Manual, Volume 8: Consent and Referrals.

3.9.1.5 Click Clear to remove all search criteria.

3.9.2 To view a list of clients who have been referred to other agencies, navigate to Agency > Agency List > Referrals > Referrals Out.

3.9.2.1 The blue area on the Referrals From screen contains a set of search criteria fields that can be used to display outgoing and sent referrals from the current agency and facility.

3.9.2.1.1 The current agency and facility are displayed in the Locator at the top of the screen.

3.9.2.1.2 The current facility is displayed in the page title.

3.9.2.1.3 To change the current agency and/or facility, navigate to My Settings > Change Facility.

3.9.2.2 Use the search criteria fields to locate the desired list of outgoing or sent referrals.

3.9.2.2.1 Referral Status Codes are used to describe the results of the referral (see 3.9.1.4.2.1 through 3.9.1.4.2.6).

3.9.2.2.2 Wildcards can be used in the Client ID, First Name, and Last Name boxes.

3.9.2.3 Click Go to display the search results.

3.9.2.3.1 A list of clients who have been referred to other agencies will be displayed.

3.9.2.4 To view or modify the details of the referral, click the "Review" link in the Actions column.

3.9.2.4.1 The referral details will be displayed.

3.9.2.4.2 Some of the referral details can be modified as needed.

3.9.2.4.3 Click Cancel or Finish to return to the Referrals From screen.

3.9.2.4.4 For detailed instructions for creating and modifying outgoing and sent referrals, see OWITS Reference Manual, Volume 8: Consent and Referrals.

3.9.2.5 Click Clear to remove all search criteria.

3.10 The agency data screens not covered under section 3.2 are not required for agency setup, but they can provide useful functions and data.

3.10.1 See section 8.0 for detailed instructions regarding the use of the following screens:

3.10.1.1 Events

3.10.1.2 Reminder

3.10.1.3 MU Query

3.10.1.4 Announcements

3.10.1.5 Removed Consents

3.10.1.6 Wait List

3.10.1.7 Deleted Clients

4.0 Facility Records

4.1 New facilities can be created by OWITS system administrators at AMH or at by agency administrators.

4.1.1 New facilities can only be created within an existing agency.

4.2 To create a new facility:

4.2.1 In the Navigation View, navigate to Agency > Agency List > Facility List.

4.2.2 A list of all facilities currently available in the selected agency will appear.

4.2.3 Browse the facility list to determine whether the facility to be created already exists.

4.2.3.1 If the facility already exists, DO NOT create a new record for the same facility.

4.2.3.1.1 Click the "Review" link in the Actions column to view or modify the facility records (see 4.3).

4.2.3.1.2 Facility records cannot be deleted.

4.2.3.2 If the facility does not exist, create a new facility.

4.2.4 Click the "Add New Facility Record" link in the Facility List heading.

4.2.5 Complete the required fields on the Facility Profile screen. (Return: 2.3.7)

4.2.5.1 *Facility Name*

4.2.5.1.1 Enter the name of the facility.

4.2.5.1.2 To ensure valid data reporting and to make it possible for OWITS system administrators to provide prompt assistance, verify that the facility name is accurate and correctly spelled.

4.2.5.1.3 This is the name of an individual facility (treatment location, branch, office, etc.) within a larger overall agency.

4.2.5.1.3.1 For example, a non-profit organization called For The People has one treatment location in Salem, Eugene, and Bend, as well as three treatment locations in Portland; its facilities might be:
For The People of Salem
For The People of Eugene
For The People of Portland (East Burnside)
For The People of Portland (PDX)
For The People of Portland (Pearl District)
For The People of Bend

4.2.5.1.4 If an agency only has one location, the facility name can match the agency name.

4.2.5.1.5 Facility names must not be names of an individual person unless accompanied by that person's credentials.

4.2.5.1.5.1 For example, David Wilder is a social worker with a doctorate degree who operates a small private practice; because he has only one location, his facility name would be the same as his agency name:
Dr. David Wilder, Ph.D., LCSW

4.2.5.2 *I-SATS #*

4.2.5.2.1 Enter the facility's I-SATS number.

4.2.5.2.2 I-SATS numbers only apply to facilities that report data for clients receiving substance abuse treatment and services.

4.2.5.2.3 AMH will provide the I-SATS number if it is not available to the agency system administrators.

4.2.5.2.4 The I-SATS number can match across all facilities within an agency.

4.2.5.2.5 Enter 00000000 if the facility does not have or use an I-SATS number (such as a facility that *only* reports mental health treatment or services or ATR services).

4.2.5.3 *Service Location*

4.2.5.3.1 Select the option that best describes the setting in which treatment or services are provided at the facility.

4.2.5.4 *Operations Start / End Date*

4.2.5.4.1 In the first of these two fields, enter the date on which the facility will first enter or accept client records.

4.2.5.4.1.1 This date is generally the date on which the facility profile is created, but individual provider needs may necessitate a different date.

4.2.5.4.1.2 Client records cannot be created within this facility prior to the date in this field.

4.2.5.4.1.3 If a provider wishes to track client treatment, services, or other activity within this facility prior to the date of the creation of the facility profile, this date must be on or before the earliest date the client activity occurred AND on or after the agency Start Date (see 3.2.5.3).

4.2.5.4.2 In the second of these two fields, enter the date on which the facility closed (or will close) or stopped (or will stop) providing treatment and services.

4.2.5.4.2.1 Client records cannot be created within this facility after the date in this field.

4.2.5.4.2.2 "Inactive" will appear in parentheses next to the name of the facility in the facility selection drop-down menus.

4.2.5.4.2.3 To reopen a closed facility, remove the date from this field.

4.2.5.5 *Contact*

4.2.5.5.1 Use this field to indicate the name of the staff person who acts as the primary contact at this facility for questions that might arise at other facilities or at AMH.

4.2.5.5.2 The names that appear in this field are populated from the Agency > Staff List records (see 6.0).

4.2.5.6 *Facility ID*

4.2.5.6.1 This field is not currently used in OWITS.

4.2.5.6.2 It should be left blank.

4.2.5.7 *National Provider ID*

4.2.5.7.1 Enter the facility's NPI in this field.

4.2.5.7.2 The NPI must be ten (10) digits in length.

4.2.5.7.3 This field is specifically for the *facility's* NPI (hospital, treatment center, office, etc.)

4.2.5.7.4 If the facility does not have its own unique NPI, enter the agency's NPI.

4.2.5.7.5 DO NOT enter an individual person's NPI in this field.

4.2.5.8 *Federal Tax ID*

4.2.5.8.1 This field will automatically populate with the agency's federal tax identification number (see 3.2.5.14).

4.2.5.9 *State Business ID*

4.2.5.9.1 This field will automatically populate with the agency's state business identification number (see 3.2.5.15).

4.2.5.10 *Contractor / Locator*

4.2.5.10.1 This field will automatically populate with the agency's contractor or locator number (see 3.2.5.16).

4.2.5.11 *County*

4.2.5.11.1 This field may automatically populate with the county selected for the agency (see 3.2.5.17).

4.2.5.11.2 Select the Oregon county in which this facility is located.

4.2.5.11.3 OWITS does not currently allow facilities to be located outside Oregon.

4.2.5.12 *Tribe*

4.2.5.12.1 This field will automatically populate with the tribe selected for the agency.

4.2.5.12.2 If the facility is associated with any of Oregon's tribes of Native Americans, select the tribe.

4.2.5.12.3 If the facility's tribe is not listed, please contact the OWITS system administrators at AMH (owits.support@state.or.us).

4.2.5.13 *Display Name*

4.2.5.13.1 Some OWITS records display an abbreviated version of the facility name.

4.2.5.13.2 This field will automatically populate with the first fifteen (15) characters entered into the Facility Name field.

4.2.5.13.3 This field may be edited to contain any desired abbreviated facility name as long as it does not exceed fifteen (15) characters, including spaces.

4.2.5.14 *Agency Name*

4.2.5.14.1 This field will automatically populate with the name of the agency to which the facility will be attached.

4.2.5.14.2 Verify that the facility is being created for the correct agency.

4.2.5.14.3 If the facility is not being created for the correct agency, click the Cancel button and change to the correct agency.

4.2.5.15 *Reports Start / End Date*

4.2.5.15.1 In the first of these two fields, enter the date on which the facility will first report client data to SAMHSA and/or TEDS.

4.2.5.15.1.1 This date is generally the date on which the facility profile is created, but individual provider needs may necessitate a different date.

4.2.5.15.1.2 Data from client records created within this facility prior to the date in this field will not be submitted to SAMHSA and/or TEDS.

4.2.5.15.2 In the second of these two fields, enter the date on which the facility stopped (or will stop) reporting client data to SAMHSA and/or TEDS.

4.2.5.15.2.1 Data from client records created within this facility after the date in this field will not be submitted to SAMHSA and/or TEDS.

4.2.5.15.2.2 To resume data submission, remove the date from this field.

4.2.5.16 *Alternate Contact*

4.2.5.16.1 Use this field to indicate the name of the staff person who acts as the secondary contact at this facility for questions that might arise at other facilities or at AMH.

4.2.5.16.2 The names that appear in this field are populated from the Agency > Staff List screen (see 6.0).

4.2.5.17 *Senate Dist*

4.2.5.17.1 This field's functionality is not currently used in OWITS.

4.2.5.17.2 It should be left blank.

4.2.5.18 *House Dist*

4.2.5.18.1 This field's functionality is not currently used in OWITS.

4.2.5.18.2 It should be left blank.

4.2.5.19 *Cong Dist*

4.2.5.19.1 This field's functionality is not currently used in OWITS.

4.2.5.19.2 It should be left blank.

4.2.5.20 *URL*

4.2.5.20.1 If the facility has a website, enter its address here.

4.2.5.20.2 The facility may or may not have the same web address as the agency.

4.2.5.20.3 It is recommended that this field contain the full web address, including the "http://" or "https://" prefix.

4.2.5.21 *Facility Description*

4.2.5.21.1 Enter a general description of the facility or important public details in this field.

4.2.5.22 *Approaches*

4.2.5.22.1 Use these option transfer boxes to indicate some or all of the types of treatment approaches used at this facility.

4.2.5.22.2 Other agencies may be able to see this data when attempting to find a suitable facility to which their staff can refer clients.

4.2.5.23 *Languages*

4.2.5.23.1 Use these option transfer boxes to list the languages spoken or otherwise available to clients at this facility through multilingual staff members, interpreters, or written material.

4.2.6 When all the required fields have been filled (and others if possible), click the right arrow to advance to the Addresses screen.

4.2.6.1 To add an address, click the "Add Address" link in the "Addresses" heading. (Return: 2.3.8)

4.2.6.1.1 Add an address by completing the address fields in the Address Information section of this screen.

4.2.6.1.2 At least one address must be selected to complete a facility profile.

4.2.6.1.3 An address with an Address Type of "Facility Billing" must be entered before the facility can submit billing records.

4.2.6.1.4 An address with an Address Type of "Facility Treatment Location" must be entered before the facility can enter records of treatment or services rendered.

4.2.6.1.5 Only one address can be recorded for each Address Type.

4.2.6.1.5.1 The address may be the same for each Address Type.

4.2.6.1.5.2 If the facility's billing address is the same as the facility's treatment location address, enter the address once for each Address Type.

4.2.6.1.6 Select "Yes" in the Confidential field to hide the address from OWITS users at other agencies.

4.2.6.1.7 When the address has been entered, click Finish to return to the Addresses screen.

4.2.6.2 To add a phone number, click the "Review" link in the Actions column of an existing address. (Return: 2.3.8)

4.2.6.2.1 A phone number cannot be entered without an address.

4.2.6.2.2 The phone number entered must be associated with the address selected.

4.2.6.2.3 Click the "Add Phone" link in the "Phone Numbers" bar.

4.2.6.2.4 Select the type of phone number.

4.2.6.2.5 Enter the number

4.2.6.2.5.1 OWITS will automatically format any ten digit number to the standard long-distance phone number format.

4.2.6.2.6 Enter the extension, if applicable.

4.2.6.2.7 When the phone number has been entered, click Finish.

4.2.6.3 When the address and its associated phone numbers have been entered, click Finish to return to the Addresses screen.

4.2.6.4 It is not necessary to repeat the agency address(es) or phone number(s) in the facility records unless they are not the same.

4.2.7 When all the addresses and phone numbers for the *facility* have been entered, click Finish to return to the Facility List screen.

4.2.8 The facility profile is now complete and should appear in the Facility List.

4.2.8.1 The whole facility record is not yet complete (see 4.4 through 4.7).

4.3 To view the profile, addresses, or phone numbers of an existing facility, locate it in the Facility List and click the "Profile" link in the Actions column.

4.3.1 Facility records can be modified as needed by OWITS administrators.

4.3.2 Viewing a facility profile will change the active facility in the Locator at the top of the screen (see OWITS Reference Manual, Volume 1: OWITS Basics).

4.4 If needed, add information to the Agency > Facility List > Contacts screen (Return: 2.3.11).

4.4.1 This screen displays staff members recorded for the facility with specific contact roles.

4.4.1.1 To record staff members as facility contacts, staff profiles must be created (see 6.0) and staff members must be assigned to the selected facility (see 6.5.7.1).

4.4.2 To add a facility contact, click the "Add Contact" link in the lower blue bar.

4.4.3 Complete the required fields.

4.4.3.1 *Staff*

4.4.3.1.1 Select the name of the staff member to be added as a facility contact.

4.4.3.1.2 Names will not appear in this field until the staff members have been assigned to specific facilities (see 6.5.7.1).

4.4.3.1.3 A staff member may be selected for multiple contact types.

4.4.3.2 *Contact Type*

4.4.3.2.1 Select the description that best fits the type of contact role to be held by the selected staff member.

4.4.3.2.2 Only one staff member may be assigned to each contact type at a time.

4.4.3.3 *Effective Date*

4.4.3.3.1 Enter the date on which the staff member began working as the selected contact type or the earliest date of the earliest record for which the selected staff member will need to access as part of this role.

4.4.3.4 *Status*

4.4.3.4.1 Select "Active" if the selected staff member is currently working in this contact role.

4.4.3.4.2 Select "Inactive" if the selected staff member is not currently working in this contact role.

4.4.3.4.3 Selecting "Inactive" for an existing contact record and saving the record as inactive will allow the contact type to be selected again in a new record.

4.4.3.5 *Manager Name*

4.4.3.5.1 This field will automatically populate after the contact is saved.

4.4.3.5.2 The name that appears in this field is the name of the contact person's manager as recorded in his or her Staff Profile (see 6.5.5.18).

4.4.4 Click Finish to return to the Facility List screen.

4.5 If needed, add information to the Agency > Facility List > Special Services screen (Return: 2.3.12).

4.5.1 Click the "Special Services" link in the Navigation View or in the Actions column.

4.5.2 The Agency Name and Facility Name fields will automatically populate.

4.5.3 If applicable, use the Special Population Services option transfer boxes to indicate any services offered at this facility for individuals with unique needs or situations such as hearing or vision impairments, special diets, or needs covered by the Americans with Disabilities Act.

4.5.4 If applicable, use the "Add New Information Item" link in the General Information heading to answer other optional questions about special services offered at this facility, such as whether religious services are offered, whether the facility provides culturally specific services, or what types of funding are available or used.

4.5.4.1 In the "Facility Supported Services" field, select the question for which additional information will be provided.

4.5.4.2 Use the small drop-down menu for a quick answer ("Yes" or "No").

4.5.4.3 Use the "Provide Detail" text box to enter a detailed answer.

4.5.4.4 Click Finish to return to the Special Services screen.

4.5.5 Click Finish to return to the Facility List.

4.6 If needed, add information to the Agency > Facility List >Addiction Services screen (Return: 2.3.13).

4.6.1 Click the "Addiction Services" link in the Navigation View or in the Actions column.

4.6.2 The Agency Name and Facility Name fields will automatically populate.

4.6.3 If applicable, use the Addiction Service option transfer boxes to indicate the categorical descriptions of the addictive substances for which this facility provides treatment, counseling, or services.

4.6.4 The list of available substance categories matches the list available in the substance abuse matrix on the Admission > Substance Abuse screen and on the Program Enrollment screen (see OWITS Reference Manual, Volume 5: Client Contact and Activity), which are used to indicate clients' addictions.

4.6.5 Click Finish to return to the Facility List.

4.7 If needed, add information to the Agency > Facility List > Operating Hours screen (Return: 2.3.14).

4.7.1 Click the "Operating Hours" link in the Navigation View or in the Actions column.

4.7.2 Use the rows (days) and columns (time ranges) to indicate the operating hours for this facility.

4.7.2.1 The first of the two fields in each Range column represents the opening time for each day.

4.7.2.2 The second of the two fields in each Range column represents the closing time for each day.

4.7.3 Use the three Range pairs to indicate various time periods during which the facility is open for each day.

4.7.3.1 If the facility opens once and closes once each day, enter the times in the Range 1 column only.

4.7.3.2 If the facility opens in the morning, closes for lunch, reopens in the afternoon, and closes in the evening, enter the early open period in the Range 1 column and the late open period in the Range 2 column.

4.7.3.3 If the facility opens in the morning, closes for lunch, reopens in the afternoon, closes for dinner, and opens again for the evening, enter the times in all three Range columns, with the earliest open period in the Range 1 column and the latest open period in the Range 3 column.

4.7.3.4 See Appendix B – Operating Hours Table (Examples) for examples.

4.7.3.5 After times have been entered in the row for Monday, it will be possible to click the "Set Tuesday to Friday same as Monday" link (above Range 3) to copy Monday's times to the rows for Tuesday, Wednesday, Thursday, and Friday.

4.7.4 Times must be entered in the hh:mm format, followed by the "am" or "pm" abbreviation *or* in military format.

4.7.4.1 Example: 05:30 PM

4.7.4.2 Example: 1900 (OWITS will automatically convert this to "7:00 PM")

4.7.5 Click Finish to return to the Facility List.

5.0 Program Records

5.1 New programs can be created by OWITS system administrators or by agency administrators.

5.1.1 New programs can only be created within an existing facility.

5.1.2 Programs cannot be copied or moved from one facility to another.

5.2 Create new programs as needed.

5.2.1 In the Navigation View, navigate to Agency > Agency List > Facility List.

5.2.2 A list of all facilities currently available in the selected agency will appear.

5.2.3 In the Actions column, click the "Programs" link for the facility in which the program will be created.

5.2.4 A list of all programs currently available in the selected facility will appear.

5.2.5 Browse the program list to determine whether the program to be created already exists.

5.2.5.1 If the program already exists, do not create a new record for the same program.

5.2.5.1.1 Click the "Review" link in the Actions column to view or modify the program record (see 5.3.2).

5.2.5.1.2 Programs cannot be deleted.

5.2.5.2 If the program does not exist, create a new program

5.2.6 Click the "Add New Program Record" link in the labeled Program List heading. (Return: 2.3.16)

5.2.7 Complete the required fields on the Program Setup screen.

5.2.7.1 *Agency Name*

5.2.7.1.1 This field will automatically populate with the name of the agency to which the program will be attached.

5.2.7.1.2 Verify that the program is being created for the correct agency.

5.2.7.1.3 If the program is not being created for the correct agency, click the Cancel button, change agencies (My Settings > Change Facility as described in OWITS Reference Manual, Volume 1: OWITS Basics), and start over at 5.2.

5.2.7.2 *Facility Name*

5.2.7.2.1 This field will automatically populate with the name of the facility to which the program will be attached.

5.2.7.2.2 Verify that the program is being created for the correct facility.

5.2.7.2.3 If the program is not being created for the correct facility, click the Cancel button, change facilities (My Settings > Change Facility as described in OWITS Reference Manual, Volume 1: OWITS Basics), and start over at 5.2.

5.2.7.3 *Program Name*

5.2.7.3.1 Enter the name of the program.

5.2.7.3.2 No two programs within the context facility can have the same name.

5.2.7.3.3 To ensure valid data reporting and to make it possible for OWITS system administrators to provide prompt assistance, verify that the program name is accurate and correctly spelled.

5.2.7.3.4 This is the name of the program in which clients will participate in specific treatment steps or receive a specific series of services.

5.2.7.3.4.1 For example, a facility might offer an anger management course, an alcohol addiction recovery program, one-on-one counseling sessions, and instruction on maintaining a personal budget.

5.2.7.3.4.2 The names for such programs might be:
Controlling Rage
Steps to Alcohol Freedom
Quality Time
Live Within Your Means

5.2.7.4 *Display Name*

5.2.7.4.1 Some OWITS records display an abbreviated version of the program name.

5.2.7.4.2 This field will automatically populate with the first fifteen (15) characters entered into the Program Name field above.

5.2.7.4.3 This field may be edited to contain any desired abbreviated program name as long as it does not exceed fifteen (15) characters, including spaces.

5.2.7.5 *Modality*

5.2.7.5.1 Select the description that best fits the treatment or services that will be rendered as part of this program.

5.2.7.5.2 Select "Recovery Support Services" *only* if the agency can claim funds from the Access to Recovery grant and provides qualifying services.

5.2.7.5.3 The option selected in this field will determine the Program Type (see 5.2.7.10).

5.2.7.5.4 See Appendix C – Program Types and Associated Modalities for an easy reference of the relationships between Program Type and Modality.

5.2.7.6 *Modality Specifier*

5.2.7.6.1 This field will not appear for all programs.

5.2.7.6.2 This field will not be used for Oregon reporting purposes.

5.2.7.6.3 If desired, or if the field is required, select the option that best describes the services offered by the program.

5.2.7.7 *Capacity Type*

5.2.7.7.1 Select the option that best describes how program availability is calculated when determining whether new clients can be enrolled in the program.

5.2.7.7.2 Select "Beds" for residential and detoxification programs or other programs in which the client spends a significant amount of time in a specific location or room.

5.2.7.7.3 Select "Slots" for programs that count the number of clients participating, such as group therapy (maximum number of attendees), classes (maximum number of students), or individual counseling (maximum counselor caseload).

5.2.7.8 *Daily Capacity*

5.2.7.8.1 Enter the maximum program capacity (in "beds" or "slots" as determined in the Capacity Type field).

5.2.7.8.2 This field refers to the maximum number of clients in a program at any given time, not how many can be added per day or how many can attend program meetings, classes, or sessions per day.

5.2.7.8.3 Example: a detoxification facility might enter 20 to indicate the number of beds or stations capable of administering detoxification treatment.

5.2.7.8.4 Example: a facility offering a substance abuse recovery program might enter 80 to indicate a maximum caseload of 20 active clients for each of four available clinicians.

5.2.7.8.5 Example: a facility offering an anger management course might enter 45 to indicate the highest total number of students the instructor can teach, track, and support at a time.

5.2.7.9 *Current Enrolled*

5.2.7.9.1 This field automatically populates with the number of clients enrolled in the program.

5.2.7.9.2 When creating a new program, this field will be blank.

5.2.7.10 *Program Type*

5.2.7.10.1 This field automatically populates based on the option selected in the Modality field 5.2.7.5.

5.2.7.10.2 See Appendix C – Program Types and Associated Modalities for an easy reference of the relationships between Program Type and Modality.

5.2.7.10.3 Program types are related to treatment domain (see 3.2.5.25).

5.2.7.10.4 The value in this field determines what data elements from the program enrollment records are reported to the state (AMH) and to the federal government (SAMHSA).

5.2.7.11 *Level of Care*

5.2.7.11.1 This field is related to the levels of care as described in the ASAM.

5.2.7.11.2 Select the option that best describes the level of care that is represented by the treatment or services that are part of this program.

5.2.7.12 *Residence*

5.2.7.12.1 Select the Oregon county in which the program will be administered.

5.2.7.12.2 If the program will be administered outside of Oregon, leave this field blank.

5.2.7.13 *Report to State*

5.2.7.13.1 Indicate whether the data collected by the program will be reported to AMH.

5.2.7.13.2 This field automatically populates with “Yes.”

5.2.7.13.3 Most programs will report data to AMH.

5.2.7.14 *Report to TEDS*

5.2.7.14.1 Indicate whether the data collected by the program will be reported to the federal government.

5.2.7.14.2 Select “Yes” if the program data should be reported for TEDS, NOMS, URS, or other federal standards.

5.2.7.14.3 This field automatically populates based on the Modality selected (see 5.2.7.5).

5.2.7.14.4 Most programs will report data to the federal government through AMH.

5.2.7.14.5 Select “Yes” if unsure whether the data should be reported to the federal government.

5.2.7.14.6 After any client enrolls in the program, this field cannot be changed, even if all clients have been disenrolled from the program (see OWITS Reference Manual, Volume 5: Client Activity and Contact and/or OWITS Reference Manual, Volume 9: Client Discharge).

5.2.7.15 *Age Group*

5.2.7.15.1 If the program is limited to clients of specific ages or age ranges, use this field to select the option that best describes that restriction.

5.2.7.15.1.1 “< 12” indicates clients who are twelve years old or younger.

5.2.7.15.1.2 “> 60” indicates clients who are sixty years old or older.

5.2.7.15.2 Clients who do not fall within the age range selected in this field can be enrolled to this program, but users will receive a warning message prior to enrollment indicating that the client does not fit the age criteria.

5.2.7.15.3 If the program is not limited by age, select "All Age Groups" or leave this field blank.

5.2.7.16 *Gender Specific*

5.2.7.16.1 If the program is limited to only male clients or only female clients, use this field to select the option that describes that restriction.

5.2.7.16.2 Clients who are not of the gender selected in this field can be enrolled to this program, but users will receive a warning message prior to enrollment indicating that the client does not fit the gender criteria.

5.2.7.16.3 If the program is not gender specific, select "Not Specific" or leave this field blank.

5.2.7.17 *Program Start Date*

5.2.7.17.1 Enter the earliest date on which clients will begin enrolling or participating in the program.

5.2.7.17.2 Clients cannot enroll in this program prior to the date in this field.

5.2.7.17.3 This date can be in the future.

5.2.7.18 *End Date*

5.2.7.18.1 Enter the latest date on which clients can participate in this program.

5.2.7.18.2 Clients cannot enroll or receive treatment or services in this program after the date in this field.

5.2.7.18.3 This date can be in the future.

5.2.7.18.4 If the program is currently open and no plans are in place to end it, leave this field blank.

5.2.8 When all of the required fields have been filled (and others if possible), click Save to save the program record.

5.2.9 Click Finish to return to the Program List screen.

5.2.9.1 The program record is now complete and capable of accepting client enrollments.

5.2.9.2 The program record will display on the Program List screen.

5.2.10 Repeat steps 5.2.5 through 5.2.9 to add more programs as needed.

5.3 Available Programs will be displayed on the Program List screen.

5.3.1 The entries in the Program List will include details about the program:

5.3.1.1 *Program Name*

5.3.1.2 *Modality*

5.3.1.3 *# Slots*

5.3.1.3.1 This is the maximum number of available beds or slots.

5.3.1.4 *Current Enrolled*

5.3.1.4.1 This is the number of clients currently enrolled to the program.

5.3.1.5 *Residence*

5.3.1.5.1 This is the county in which the program is administered.

5.3.1.6 *Gender Specific*

5.3.1.6.1 This details any gender-related enrollment restrictions.

5.3.1.7 *Term*

5.3.1.7.1 This is a date range that indicates the program's starting and ending dates.

5.3.2 To view the details of a Program Record, click the "Review" link in the Actions column.

5.3.2.1 Editable fields can be changed as needed to reflect changes made to the program.

5.3.2.1.1 Changing the Modality field also changes the Program Type field (see 5.2.7.5 and 5.2.7.10.

5.3.2.1.2 Changing the program type is not recommended.

5.3.2.2 The Current Enrolled field will display the total number of clients enrolled in the program.

5.3.2.3 If at least one client has been enrolled in the program at any time, the Report to TEDS field will not be editable.

5.3.2.4 Program Start Date (5.2.7.17) and End Date (5.2.7.18) fields may be edited as needed.

5.4 Provider agencies may use a program or a note to report ITRS clients.

5.4.1 For instructions on using the note option to report ITRS clients, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

5.4.2 To use the program option for reporting ITRS clients, create an ITRS program.

5.4.3 Enter "ITRS (Concurrent)" into the Program Name field (5.2.7.3).

5.4.4 Enter "ITRS" into the Display Name field (5.2.7.4).

5.4.5 Select "No" in the Report to TEDS field (5.2.7.14).

5.4.6 Complete the other data fields as appropriate.

5.4.7 When the program has been configured, clients should be enrolled in a standard federally-reported treatment program (Outpatient, DUII, etc.) and concurrently enrolled in the "ITRS (Concurrent)" program for as long as they are eligible for ITRS.

5.4.7.1 Clients are not required to enroll in the "ITRS (Concurrent)" program at the same time that they are enrolled in the other treatment program(s).

5.4.7.2 Clients are allowed to remain enrolled in the other treatment program(s) even if they become ineligible for ITRS.

5.4.7.3 For details regarding program enrollment, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

6.0 Creating Staff Records

6.1 Staff records can be created by OWITS system administrators or by agency administrators.

6.1.1 Some staff records should be created before the process of creating a new agency is completed (see 2.0 for a suggested order of operations to follow when creating agency, facility, program, and staff records).

6.2 Staff records are used to track agency employees, contractors, and associated business contacts (such as counselors, law enforcement personnel, medical professionals, etc.) who regularly work with but are not employed by the agency.

6.2.1 Staff records can be used to control when and if OWITS users in the facility have access to specific client records and/or system modules.

6.2.2 To ensure system security, data integrity, and compliance with HIPAA and 42 CFR, staff records must be kept up-to-date.

6.3 Staff records can be created in OWITS regardless of whether the individual will be using the system.

6.3.1 Non-users may include directors, managers, some counselors, law enforcement personnel, parole officers, school staff, medical professionals, etc.

6.3.2 Physicians who work *with* but not *for* the agency may have a staff record and/or may be recorded in the Non-Staff Physicians screen (see 8.9).

6.4 The first staff record created in OWITS for any agency must be for a manager, director, or other individual to which most or all other staff members will report.

6.4.1 The first staff record created in OWITS for the agency does not require a manager to be identified.

6.4.1.1 A later review of the first staff record may require a manager to be identified.

6.4.2 All subsequent staff records created in OWITS do require a manager to be identified.

6.4.3 A staff member may be recorded in OWITS as being his or her own manager.

6.5 Create new staff records. (Return: 2.3.3)

6.5.1 In the Navigation View, navigate to Agency > Staff List

6.5.2 A search screen will appear.

6.5.3 Search through existing staff records to determine whether the staff record to be created already exists.

6.5.3.1 It may be necessary to set the "Staff Active Indicator" field to the null value (blank) to locate all staff records by ignoring the staff profile's End Date field (6.5.5.12).

6.5.3.1.1 Selecting "Active" in the Staff Active Indicator field will return results for staff members whose profiles do not have an end date or who have an end date fewer than 30 days prior to the current date.

6.5.3.1.2 Selecting "Inactive" in the Staff Active Indicator field will return results for staff members whose profiles have an end date that is more than 30 days prior to the current date.

6.5.3.2 If the staff record already exists, DO NOT create a new record for the same staff member.

6.5.3.2.1 Click the "Review" link in the Actions column to view or modify the staff record (see 7.0).

6.5.3.2.2 Staff records cannot be deleted, but some staff records can be hidden (see 6.5.5.12).

6.5.3.3 If the staff record does not exist, create a new staff record.

6.5.4 Click the "Add New Agency Staff Record" link in the Agency Staff List heading.

6.5.5 Complete the required fields on the Staff Profile screen.

6.5.5.1 *First Name*

6.5.5.1.1 Enter the staff member's first name.

6.5.5.1.2 Avoid using nicknames in this field.

6.5.5.2 *Middle*

6.5.5.2.1 Enter the staff member's middle name, if applicable.

6.5.5.2.2 Avoid using nicknames in this field.

6.5.5.3 *Last*

6.5.5.3.1 Enter the staff member's current last name or surname.

6.5.5.3.2 To make it possible for OWITS system administrators to provide prompt assistance, verify that the last name is accurate and correctly spelled.

6.5.5.4 *Prof. Credentials*

6.5.5.4.1 If the staff member has professional credentials (letters that usually follow the last name), enter them here.

6.5.5.4.2 Professional credentials might include the following examples:
Ph.D.
MBA
LCSW

6.5.5.4.3 Multiple professional credentials may be separated by a space, colon, semicolon or other punctuation.

6.5.5.4.4 Professional credentials will appear following the staff member's name in a variety of locations within OWITS such as the Locator (see OWITS Reference Manual, Volume 1: OWITS Basics), the Treatment Plan signature page (see OWITS Reference Manual, Volume 5: Client Activity and Contact), the Encounters screen (see OWITS Reference Manual, Volume 5: Client Activity and Contact), and in most staff name fields, signatures, and drop-down menus.

6.5.5.5 *Gender*

6.5.5.5.1 Select the staff member's gender.

6.5.5.5.2 OWITS does not capture whether a staff member's gender is in question, in transition, or has changed since birth.

6.5.5.6 *DOB*

6.5.5.6.1 Enter the staff member's date of birth.

6.5.5.6.2 This field is required for users who will be accessing OWITS reports outside the OWITS application using the SSRS reporting tools.

6.5.5.7 *Email*

6.5.5.7.1 Enter the staff member's email address.

6.5.5.7.2 The email address must fit the standard email address format: name@domain.com

6.5.5.7.3 To make it possible for OWITS system administrators to provide prompt assistance, verify that the email address is up-to-date, accurate, and correctly spelled.

6.5.5.7.4 All user login information will be sent to this email address.

6.5.5.8 *Social Security*

6.5.5.8.1 Agencies have the option of recording the staff member's Social Security Number in this field.

6.5.5.8.2 Please use caution—the staff member's Social Security Number will be visible to all other staff members with access to staff records (see 6.5.10.5.3 or 6.5.10.5.6).

6.5.5.9 *National Provider ID*

6.5.5.9.1 Enter the staff member's NPI in this field.

6.5.5.9.2 The NPI must be ten (10) digits in length.

6.5.5.9.3 This field is specifically for the *individual person's* NPI.

6.5.5.9.4 DO NOT enter the agency or facility NPI in this field unless the agency is legally indistinguishable from the individual (such as in the example described in 3.2.5.1.4).

6.5.5.9.5 The staff member responsible for billing (see OWITS Reference Manual, Volume 11: Billing) and designated the "Billing Contact" (see 3.6) must have an NPI.

6.5.5.10 *Title*

6.5.5.10.1 If desired, select the option that most closely matches the staff member's title within the agency.

6.5.5.11 *Start Date*

6.5.5.11.1 Enter the date on which the staff member began working with or for the agency.

6.5.5.11.2 The staff member's name will appear as a selectable option on some client records that were created on or after this date.

6.5.5.12 *End Date*

6.5.5.12.1 Enter the date on which the staff member concluded his or her work with or for the agency.

6.5.5.12.2 The staff member's name will only appear as a selectable option on some client records that were created on or before this date.

6.5.5.12.3 The staff member's name will continue to appear in most staff drop-down menus until this date is more than 30 days prior to the current date.

6.5.5.13 *Dev Plan Date*

6.5.5.13.1 If desired, enter the date on which the staff member's development plan was created or most recently modified.

6.5.5.14 *Perf Rev*

6.5.5.14.1 If desired, enter the date on which the staff member's performance review was most recently conducted or on which the staff member's next performance review will occur.

6.5.5.15 *Last TB Test Date*

6.5.5.15.1 Enter the date of the staff member's most recent tuberculosis test.

6.5.5.16 *Staff Type*

6.5.5.16.1 Select the option that best describes the role or position held by the staff member.

6.5.5.17 *Clinical Supervisor*

6.5.5.17.1 Select the staff member's clinical supervisor.

6.5.5.17.2 This field will only display the names of other staff members who have "Clinical Supervisor" selected as their Staff Type (see 6.5.5.16).

6.5.5.18 *Manager Name*

6.5.5.18.1 Select the staff member's manager.

6.5.5.18.2 This field will display the names of all agency staff members whose Staff Profiles have been created in OWITS.

6.5.5.18.3 A staff member may be his or her own manager.

6.5.5.18.4 The name of the staff member whose record is currently being created will not be available in this field until the record is saved.

6.5.5.18.5 This field is not required for the first staff record created for the agency (see 2.3.3.2 and 6.4).

6.5.5.19 *Employment Type*

6.5.5.19.1 Select the option that best describes the staff member's term of employment.

6.5.5.20 *Comments*

6.5.5.20.1 Enter any additional information about the staff member's assignments, work schedule, employment status, and other relevant details as desired into this field.

6.5.5.20.2 If the staff member has an alternate email address, enter it here.

6.5.5.21 *Policies & Procedures Manual Reviewed?*

6.5.5.21.1 Indicate whether the staff member has adequately reviewed the agency's policies and procedures and has met any related training requirements.

6.5.5.21.2 Agency policies determine when staff members need to review policies and procedures, what policies and procedures should be reviewed, and how such reviews are qualified as adequate.

6.5.5.22 *Required Background Checks Completed?*

6.5.5.22.1 Indicate whether the staff member has had a background check performed.

6.5.5.22.2 Agency policies determine which staff members need to have background checks performed and under what circumstances.

6.5.5.23 *Background Check Outcomes Acceptable?*

6.5.5.23.1 Indicate whether the staff member's background check results met the agency's requirements.

6.5.5.23.2 Agency policies determine the acceptability of background check results.

6.5.5.24 *Last Performance Appraisal Process Participation?*

6.5.5.24.1 Indicate whether the staff member was present for or took part in his or her most recent performance appraisal.

6.5.5.24.2 Agency policies determine if or when such participation is necessary.

6.5.5.25 *Taxonomy*

6.5.5.25.1 Use these three fields to describe the staff member's work assignments or field of expertise.

6.5.5.25.2 The option selected in the Category field will determine what options are available in the Sub-Category field.

6.5.5.25.3 The option selected in the Sub-Category field will determine what options are available in the Specialty field.

6.5.5.25.4 See Appendix D – Staff Profile and Non-Staff Physician Taxonomy Table for a breakdown of the available options.

6.5.5.25.5 To avoid errors, this should be the last section of this screen that is completed.

6.5.6 When all the required fields have been filled (and others if necessary), click the right arrow to advance to the Contact Info screen. (Return: 2.3.17)

6.5.6.1 In the first seven fields, enter the staff member's phone number(s).

6.5.6.1.1 The "Emergency(P) #" field refers to an emergency phone number to use to call the staff member's personal or family emergency contact.

6.5.6.1.2 The "Emergency(W) #" field refers to an emergency phone number to use to call the staff member's work or professional emergency contact.

6.5.6.2 The email address field will automatically populate with the address from the matching field on the Staff Profile screen (see 6.5.5.7).

6.5.6.3 Use the "Preferred Method of Contact" field to indicate how the staff member prefers to receive communication.

6.5.6.3.1 Agency managers and supervisors may use this field to determine the best way to contact a staff member.

6.5.6.3.2 OWITS system administrators at AMH will use this field as a reference if they need to contact the staff member.

6.5.6.4 To add an address, click the "Add Address" link in the "Addresses" heading.

6.5.6.4.1 Add an address by completing the address fields in the Address Information section of this screen.

6.5.6.4.2 Only one address can be recorded for each Address Type.

6.5.6.4.3 Select "Yes" in the Confidential field to hide the address from OWITS users at other agencies.

6.5.6.4.4 When the address has been entered, click Finish to return to the Contact Info screen.

6.5.7 When all phone numbers and addresses have been entered, click the right arrow to advance to the Staff Assignment screen. (Return: 2.3.10) (Return: 2.3.18)

6.5.7.1 Use the Approved Facilities option transfer boxes to indicate the agency's facilities in which the staff member will work.

6.5.7.1.1 Facility profiles (4.2) must be completed before the facility name will appear in these boxes (see 2.0 for a suggested order of operations to follow when creating agency, facility, program, and staff records).

6.5.7.1.2 If their system access allows, staff members will be able to see that client records exist in all facilities.

6.5.7.1.3 Staff members will not be able to create, view, or modify client records in the facilities in the "Facilities Not Approved For" box.

6.5.7.1.4 Staff members will only be able to create, view, and modify client records in facilities in the "Facilities Approved For" box.

6.5.7.2 Click the "Add Program" link in the Programs heading to assign the staff member to specific programs within approved facilities.

6.5.7.2.1 This section specifies which staff members' names will appear in the Program Staff field on the Program Enrollment screen (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

6.5.7.2.2 This section also allows the selected staff member to view encounter notes in the Combined Note Data report (see OWITS Reference Manual, Volume 10: Running Reports).

6.5.7.2.3 Select the facility in which the desired program exists.

6.5.7.2.3.1 Facility profiles (4.2) must be completed before the facility name will appear in this field (see 2.0 for a suggested order of operations to follow when creating agency, facility, program, and staff records).

6.5.7.2.3.2 Only facilities that appear in the "Facilities Approved For" box above will be available in this field.

6.5.7.2.4 Select the program to which the staff member will be assigned.

6.5.7.2.4.1 Program records (5.2) must be completed before the programs will appear in this field (see 2.0 for a suggested order of operations to follow when creating agency, facility, program, and staff records).

6.5.7.2.4.2 Only programs created within the facility selected in the Facility field above will be available in this field.

6.5.7.2.5 Enter the first date on which the staff member began or will begin working with clients or client records in the selected program.

6.5.7.2.6 Enter the date on which the staff member stopped or will stop working with clients or client records in the selected program.

6.5.7.2.7 Enter the number of hours per week the staff member will or did commit to working with clients or client records in the selected program.

6.5.7.2.8 Click Save.

6.5.7.3 Click Save.

6.5.8 When all facility and program assignments have been completed, click the right arrow to advance to the Staff Language screen. (Return: 2.3.19)

6.5.8.1 To add an indicator of the staff member's language fluency, click the "Add Language" link in the unlabeled blue bar.

6.5.8.2 In the Language field, select the language to be specified.

6.5.8.3 In the Fluency field, select the option that best describes how well the staff member speaks or otherwise uses the language.

6.5.8.4 Click Save.

6.5.9 When all desired language indicators have been added, click the right arrow to advance to the Staff Qualifications screen. (Return: 2.3.20)

6.5.9.1 Alerts may be configured for Staff Qualifications to warn of upcoming expiration dates (see 11.4.22).

6.5.9.2 To add a license to the staff member's record, click the "Add License" link in the Licenses heading.

6.5.9.2.1 Licenses include professional licensure such as clinical social work.

6.5.9.2.1.1 If a necessary license description is unavailable, please contact OWITS Support (owits.support@state.or.us).

6.5.9.2.2 Select the license description.

6.5.9.2.3 Enter the date on which the license will expire.

6.5.9.2.4 Click Finish.

6.5.9.3 To add a certification to the staff member's record, click the "Add Certification" link in the Certifications heading.

6.5.9.3.1 Certifications include specific training and qualifications such as First Aid, CPR, CADC, etc.

6.5.9.3.1.1 If a necessary certificate description is unavailable, please contact OWITS Support (owits.support@state.or.us).

6.5.9.3.2 Enter the date on which the certification will expire.

6.5.9.3.3 Enter the date on which the certification was issued.

6.5.9.3.4 Click Finish.

6.5.9.4 To add an educational degree to the staff member's record, click the "Add Degree" link in the Degrees heading.

6.5.9.4.1 Degrees include educational accomplishments such as Associate and Bachelor degrees.

6.5.9.4.1.1 If a necessary degree is unavailable, please contact OWITS Support (owits.support@state.or.us).

6.5.9.4.2 Enter the date on which the degree was issued by an educational institution.

6.5.9.4.3 Click Finish.

6.5.9.5 To add training records to the staff member's record, click the "Add Training" link in the Training heading.

6.5.9.5.1 Training programs are defined or identified by the agency.

6.5.9.5.2 Enter the name or brief description of the course.

6.5.9.5.3 Enter the date on which the training course was completed

6.5.9.5.4 Click Finish.

6.5.10 When all the desired licenses, certifications, degrees, and training records have been added, click the right arrow to advance to the Account Information screen. (Return: 2.3.21)

6.5.10.1 The first six fields in the User Information section display previously entered information about the staff member.

6.5.10.2 Update the staff member's email address as needed.

6.5.10.2.1 Any changes made to the email address on this screen will also be made to the email address on the Staff Profile (6.5.5.7) and the Contact Info (6.5.6) screens.

6.5.10.3 If the staff member will be using OWITS but does not yet have a user ID, create one in the User Login ID field.

6.5.10.3.1 A user ID can consist of letters, numbers, and some special characters such as hyphens and underscores.

6.5.10.3.1.1 Do not use spaces in a user ID.

6.5.10.3.1.2 User IDs must be limited to no more than 20 characters.

6.5.10.3.1.3 If the user ID exceeds 20 characters, it may be abbreviated as needed (using "trn" to abbreviate "training" and "emr" to abbreviate "emergency").

6.5.10.3.2 A user ID should include the user's first initial and last name.

6.5.10.3.2.1 Example: Elizabeth Jones = ejones

6.5.10.3.3 If a user ID already exists for another user with the same last name and a similar first name, add the staff member's middle initial.

6.5.10.3.3.1 Example: Elizabeth K Jones = ekjones

6.5.10.3.4 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 add a number to the end of the user ID.

6.5.10.3.4.1 Example: Emily Jones = ejones2

6.5.10.3.5 If the staff record is being created in the OWITS Training environment (see OWITS Reference Manual, Volume 1: OWITS Basics), follow the user ID with an underscore and the word "training."

6.5.10.3.5.1 Example: Elizabeth Jones = ejones_training

6.5.10.3.6 Match user IDs between work environments.

6.5.10.3.6.1 Example: Elizabeth K Jones (Production) = ekjones

6.5.10.3.6.2 Example: Elizabeth K Jones (Training) = ekjones_training

6.5.10.4 To give a staff member OWITS access after a user ID has been created, click the "Create Account" link in the Administrative Actions box near the bottom of the screen.

6.5.10.4.1 The staff member will receive an email from noreply@witsweb.org with his or her initial user ID, password, and PIN (see OWITS Reference Manual, Volume 1: OWITS Basics).

6.5.10.5 Before the staff member can access any data in OWITS, his or her record must show assigned roles.

6.5.10.5.1 Select the applicable descriptions in the Job Function Roles option transfer boxes to grant the staff member access to certain OWITS functions.

6.5.10.5.2 Select the applicable descriptions in the Role Attributes option transfer boxes to grant the staff member access to certain OWITS modules.

6.5.10.5.3 For a general description of an option in the Job Function Roles or Role Attributes boxes, select it in the drop-down menu under the blue "Role Descriptions" bar.

6.5.10.5.3.1 A description will appear in the gray text box under the blue "Role Descriptions" bar.

6.5.10.5.4 Some of the Job Function Roles will automatically select one or more Role Attributes as well.

6.5.10.5.5 Job Function Roles and Role Attributes that appear in red text indicate "Administrator" system access levels that are generally reserved for OWITS system administrators only.

6.5.10.5.5.1 These roles and attributes provide access to all or multiple agencies, broad access to client records, and the ability to make some system modifications.

6.5.10.5.5.2 State system administrators may issue these roles and attributes to some agency and facility users as needed.

6.5.10.5.6 For a detailed description of all the Job Function Roles and Role Attributes, as well as how each affects OWITS and interacts with each other, see OWITS Reference Manual, Volume 13: Tier 1 System Administration or contact owits.support@state.or.us to request the "Roles and Responsibilities" list.

6.5.10.6 The Support Ticket Notification Indicator field indicates whether the staff member will receive system-generate emails when support tickets are created (for more information about support tickets, see OWITS Reference Manual, Volume 1: OWITS Basics).

6.5.10.6.1 This field will only be available for users who have at least one of several "Administrator" Job Function Roles assigned.

6.5.10.6.2 Select "Yes" only if the staff member will be viewing and responding to OWITS support tickets.

6.5.10.7 The Emergency Access fields allow users to have limited (read-only) access to OWITS modules.

6.5.10.7.1 To allow a user to have emergency access, select Yes in the "Allowed Emergency Access?" field.

6.5.10.7.2 To enable the user's emergency access, enter a user ID in the "Emergency Login ID" field.

6.5.10.7.2.1 This user ID should be similar to the user ID entered in the User Login ID field (6.5.10.3).

6.5.10.7.2.2 It is suggested that the "Emergency Login ID" should be followed by an underscore and the word "emergency."

6.5.10.7.2.2.1 Example: ekjones_emergency

6.5.10.7.3 Not all OWITS modules will be available to users who access the application using this login.

6.5.10.7.4 Use the "Receive Emergency Access Email?" filed to specify whether this user should receive an email notification when another user logs in using his or her emergency access account.

6.5.10.7.4.1 CAUTION: Signing in using the emergency login will cause an automated email message to be sent to all agency users with "WITS Admin" or "Agency Administrator" roles (see 6.5.10.5.1) and "Yes" selected in this field.

6.5.11 When a user ID and roles have been assigned, click Finish to return to the Staff List screen.

6.5.12 The staff record is now complete.

6.5.12.1 If a user ID was assigned and an account created, the staff member now has access to OWITS.

6.6 The Staff-Plan Profile module is not currently used in OWITS.

7.0 Reviewing and Modifying Staff Records

7.1 In the Navigation View, navigate to Agency > Staff List.

7.2 Use the search fields to locate the desired staff record.

7.2.1 The Agency field will list only the agency's to which the current user has access.

7.2.2 Use the Staff Active Indicator field to filter records of staff members who are or are not currently employed by the agency.

7.2.2.1 If this field is blank, all staff records matching the other search criteria will be returned.

7.2.2.2 If "Active" is selected in this field, staff records matching the other search criteria will be returned for staff members who do not have an End Date (see 6.5.5.12) or who do have an End Date less than 30 days prior to the current date.

7.2.2.3 If "Inactive" is selected in this field, staff records matching the other search criteria will be returned for staff members who have an End Date (see 6.5.5.12) at least 30 days prior to the current date.

7.2.3 Wildcards can be used in the three text boxes.

7.2.3.1 *User ID*

7.2.3.2 *First Name*

7.2.3.3 *Last Name*

7.3 A list of staff members whose records match the search criteria will appear in the Agency Staff List.

7.4 The "Reset Logon" column offers shortcuts to some of the actions available on the Account Information screen (Agency > Staff List > Account Information—see 6.5.10).

7.4.1 To reset a user's password and PIN, click the "Reset Credentials" link.

7.4.1.1 A confirmation page will appear asking to confirm or cancel the password and PIN reset command.

7.4.1.2 Click No to cancel the reset.

7.4.1.3 Click Yes to reset the user's password and PIN.

7.4.1.4 The staff member will receive an email from noreply@witsweb.org with a new system-generated password and PIN.

7.4.1.4.1 The new password and PIN will be sent to the email address that appears in the Email column of the Agency Staff List as well as in three locations within the staff record (see 6.5.5.7, 6.5.6.2, and 6.5.10.2).

7.4.1.5 The password and PIN will both be reset with this function.

7.4.1.5.1 It is not possible to reset only the password or PIN individually.

7.4.2 To enable a user's account after it has been disabled, click the "Enable Account" link.

7.4.2.1 A user's account may be disabled when he or she makes three unsuccessful login attempts (using an incorrect password or PIN).

7.4.2.2 A user's account may be disabled manually by an OWITS system administrator (see 7.5.3.5).

7.4.2.3 Enabling an account does not reset the user's password and PIN.

7.4.3 To unlock a user's account, click the "Release Lock" link.

7.4.3.1 A user's account may become locked if his or her computer's IP address was reset while logged into OWITS.

7.4.3.1.1 This situation typically occurs when a Wi-Fi signal is interrupted or temporarily lost.

7.4.3.2 A user's account may become locked if he or she neglects to logout of OWITS from one computer and attempts to log in later from another computer.

7.4.3.3 Releasing a locked account instructs OWITS to allow a login from a new IP address.

7.4.3.4 Releasing a locked account does not reset the user's password and PIN.

7.5 To view the details of a staff record, click the "Review" link in the Actions column.

7.5.1 Modify fields on the Staff Profile (6.5.5), Contact Info (6.5.6), Staff Assignment (6.5.7), Staff Language (6.5.8), and Staff Qualifications (6.5.9) screens as needed.

7.5.2 The staff member's account information and OWITS accessibility can be modified on the Account Information screen (6.5.10).

7.5.3 Account actions are found in the Administrative Actions box near the bottom of the screen.

7.5.3.1 To reset a user's password and PIN, click the "Reset Credentials" link (see 7.4.1).

7.5.3.2 To enable a user's account after it has been disabled, click the "Enable Account" link (see 7.4.2).

7.5.3.3 To unlock a user's account, click the "Release Lock" link (see 7.4.3).

7.5.3.4 To require a user to change his or her password and PIN, click the "Expire Credentials" link.

7.5.3.4.1 The next time the user attempts to log in to OWITS, he or she will be required to change his or her password and PIN.

7.5.3.4.2 Expiring credentials does not reset the user's password and PIN.

7.5.3.5 To block a user from accessing OWITS, click the "Disable Account" link.

7.5.3.5.1 The staff member's OWITS account will still exist, but it will not be accessible.

7.5.3.5.2 This action is typically used as a security measure to prevent unauthorized access to OWITS and sensitive client records when a staff member is away for a long period of time (vacation, leave, etc.) or when the staff member is suspected of inappropriate use of OWITS data (see OWITS Reference Manual, Volume 15: AMH Policies).

7.5.3.5.3 Disabling an account does not reset the user's password and PIN.

7.5.3.5.4 Accounts can be re-enabled by OWITS system administrators (see 7.4.2 and 7.5.3.2).

7.5.3.6 To completely revoke a staff member's access to OWITS, click the "Remove Account" link.

7.5.3.6.1 This function is typically used in conjunction with the End Date (see 6.5.5.12) when a staff member concludes his or her employment with the agency.

7.5.3.6.2 OWITS will no longer recognize the staff member's user ID.

7.5.3.6.2.1 If necessary, the user ID can be changed and a new account can be created (see 6.5.10.3 and 6.5.10.4).

7.5.3.6.3 Job Function Roles and Role Attributes will be reset.

7.5.3.6.4 Historical records of the user's activity in OWITS will not be affected.

7.6 To view the staff member's OWITS activity, navigate to Agency > Staff List > Staff System Usage.

7.6.1 This screen displays when the staff member accessed OWITS, for how long, and from what computer.

7.6.2 The Time and Activity columns display two specific actions: Logon and Logoff.

7.6.3 The IP Address column displays the IP address of the computer used to access OWITS.

7.6.4 This screen may be used to identify suspicious activity (see OWITS Reference Manual, Volume 15: AMH Policies).

7.6.4.1 Example: Access from multiple IP addresses within a short period of time may indicate compromised password security, shared access, or use of an unstable Wi-Fi network.

7.6.4.2 Example: Access at odd times (such as a 3:00 a.m. login for a staff member whose working hours are 9:00 a.m. to 5:00 p.m.) may indicate compromised security.

8.0 Additional Information – Agency

8.1 Agency > Agency List > Events

8.1.1 The Agency Events screen was added to allow agencies to record notes or incidental reports that are not directly related to a client or to a client's activity.

8.1.2 The Events List screen displays a table of any previously recorded Event records.

8.1.3 Click "Add" to enter a new Event record.

8.1.4 The Event Profile screen will display, which consists of the following fields:

8.1.4.1 *Event*

8.1.4.1.1 Select the option that best describes the event.

8.1.4.1.2 Additional options can be added to this drop-down menu by sending a request to owits.support@state.or.us.

8.1.4.2 *Date*

8.1.4.2.1 Enter the date on which the event occurred or will occur.

8.1.4.2.2 This date can be in the future.

8.1.4.3 *Leader*

8.1.4.3.1 Use this field to identify the name of the staff member who led, conducted, recorded, or is otherwise responsible for the event.

8.1.4.3.2 This field will automatically populate with the name of the current user.

8.1.4.3.3 To change this name, clear its current contents, type the first few letters of the user's *last name*, and click the magnifying glass to the right of the field.

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

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

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

8.1.4.4 *Other Leader*

8.1.4.4.1 This field may be used to record the names of other users or staff members who are responsible for the event.

8.1.4.5 *Type*

8.1.4.5.1 Select the option that best categorizes the details of the Event record.

8.1.4.5.2 Additional options can be added to this drop-down menu by sending a request to owits.support@state.or.us.

8.1.4.6 *County*

8.1.4.6.1 Select the Oregon county in which the event took place.

8.1.4.7 *# of Participants*

8.1.4.7.1 Enter the number of people involved in the event.

8.1.4.7.2 Agencies are at liberty to decide how to determine this count—number of staff, number of clients, total staff and clients, etc.

8.1.4.8 *Topic*

8.1.4.8.1 Enter a description of the event, including as many details as necessary.

8.1.4.9 *Comments*

8.1.4.9.1 Enter any additional information relevant to the Event record.

8.1.5 Click Save.

8.1.6 Click Finish to return to the Events List screen.

8.1.7 Existing Event records may be viewed and edited using the "Review" link in the Actions column.

8.1.8 Even records cannot be deleted.

8.2 Agency > Agency List > Reminder

8.2.1 The Reminder screen was designed and integrated into OWITS primarily for the purpose of meeting Meaningful Use certification criteria.

8.2.2 It may be useful to identify specific clients with the same diagnosis, medication, allergy, age, etc.

8.2.3 This screen allows users to scan client records for specific criteria.

8.2.3.1 *Problem*

8.2.3.1.1 This field contains all options available on the Diagnosis screens (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

8.2.3.2 *Medication*

8.2.3.2.1 This field contains all options available on the Medication screen (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

8.2.3.3 *Lab Test*

8.2.3.3.1 This field is not currently used in OWITS.

8.2.3.3.2 It should be left blank.

8.2.3.4 *Results*

8.2.3.4.1 This field is associated with the Lab Test field, which is not currently used in OWITS.

8.2.3.4.2 It should be left blank.

8.2.3.5 *Medication Allergy List*

8.2.3.5.1 This field contains all of the drug and medication allergies available on the Allergies screen (see OWITS Reference Manual, Volume 4: Client Profile).

8.2.3.6 *Age*

8.2.3.6.1 This field allows users to search for clients of a specific age or age range.

8.2.3.6.2 To search for clients of a single age, enter a single number, such as "30."

8.2.3.6.3 To search for clients between two ages, enter the first (youngest) age separated from the last (oldest) age by a colon, such as "20:40."

8.2.3.7 *Gender*

8.2.3.7.1 This field allows users to search for clients of a specific gender as identified in their OWITS client profile (see OWITS Reference Manual, Volume 4: Client Profile).

8.2.4 Data produced in the search results on this screen are for informational purposes only.

8.2.4.1 The "Preferred Method of Contact" column displays only the client's address, phone number, or email address, according to the selection made in the Preferred Method of Contact field on the Contact Info screen of the Client Profile (see OWITS Reference Manual, Volume 4: Client Profile).

8.3 Agency > Agency List > MU Query

8.3.1 The MU Query screen was designed and integrated into OWITS primarily for the purpose of meeting Meaningful Use certification criteria.

8.3.2 It may be useful to identify specific clients with the same diagnosis, medication, age, gender, etc.

8.3.3 This screen allows users to scan client records for specific criteria

8.3.3.1 *Problem*

8.3.3.1.1 This field contains all options available on the Diagnosis screens (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

8.3.3.2 *Medication*

8.3.3.2.1 This field contains all options available on the Medication screen (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

8.3.3.3 *Lab Test*

8.3.3.3.1 This field is not currently used in OWITS.

8.3.3.3.2 It should be left blank.

8.3.3.4 *Results*

8.3.3.4.1 This field is associated with the Lab Test field, which is not currently used in OWITS.

8.3.3.4.2 It should be left blank.

8.3.3.5 *Age*

8.3.3.5.1 This field allows users to search for clients of a specific age or age range.

8.3.3.5.2 To search for clients of a single age, enter a single number, such as “30.”

8.3.3.5.3 To search for clients between two ages, enter the first (youngest) age separated from the last (oldest) age by a colon, such as “20:40.”

8.3.3.6 *Gender*

8.3.3.6.1 This field allows users to search for clients of a specific gender as identified in their OWITS client profile (see OWITS Reference Manual, Volume 4: Client Profile).

8.3.4 Data produced in the search results on this screen are for informational purposes only.

8.4 Agency > Agency List > Announcements

8.4.1 Announcements appear on the agency Home Page (see OWITS Reference Manual, Volume 1: OWITS Basics).

8.4.2 The announcements feature can be used to communicate information to all OWITS users, to agency types, or to specific agencies.

8.4.3 Announcements can communicate any desired, non-confidential information.

8.4.3.1 Announcements from OWITS system administrators at AMH will include information about system changes, policy changes, planned system outages, and known errors that are being corrected.

8.4.3.2 Announcements from agency administrators might include schedule changes, upcoming meetings, staffing changes, etc.

8.4.4 To create an announcement, navigate to Agency > Agency List > Announcements.

8.4.4.1 All active announcements created by the current user will be displayed on this screen.

8.4.4.2 To access this screen, the user must have the Agency Administrator job function role (see 6.5.10.5.1).

8.4.5 Click the "Add New Announcement" link in the blue Announcement List bar.

8.4.6 Complete the necessary fields.

8.4.6.1 *Summary*

8.4.6.1.1 Enter a summary of the announcement.

8.4.6.1.2 This will serve as the "title" of the announcement that will appear on the Announcement List screen and on the agency Home Page (see OWITS Reference Manual, Volume 1: OWITS Basics).

8.4.6.1.3 Limit the summary to 150 characters or fewer (including spaces).

8.4.6.1.4 Announcements from OWITS system administrators at AMH will be preceded by "State" in the summary.

8.4.6.2 *Details*

8.4.6.2.1 Enter the details of the announcement.

8.4.6.2.2 Include any relevant information.

8.4.6.2.3 Announcements should not include any private or protected information that cannot be seen by non-agency staff and OWITS system administrators.

8.4.6.2.4 The details field does not have a character limit.

8.4.6.3 *Agency Type*

8.4.6.3.1 Selecting an agency type will disallow the selection of a specific agency in the Agency field (see 8.4.6.4).

8.4.6.3.2 If the announcement is intended for *all* users in *all* agencies, leave this field blank.

8.4.6.3.3 If the announcement is intended for multiple agencies that offer similar services, select the agency type to which the announcement will be broadcast.

8.4.6.3.3.1 It may be necessary to create multiple announcements in order to limit the announcement to specific agency types.

8.4.6.3.3.2 For example, if an announcement needed to be made to all ATR providers that was not relevant to Substance Abuse and Mental Health providers, and if four of the agency types included the ATR treatment domain, the announcement would have to be created four times—once for each agency type that included ATR.

8.4.6.4 *Domains*

8.4.6.4.1 This field will not be visible to users who have access to only one agency.

8.4.6.4.2 Making a selection in this option transfer box will disallow the selection of a specific agency in the Agency field (see 8.4.6.4).

8.4.6.4.3 If the announcement is intended for all agencies that provide services within a specific treatment domain, move the domain(s) from the left box to the right box.

8.4.6.4.4 CAUTION: Selecting a domain will broadcast the announcement to *all* agencies that provide services in that domain, regardless of the agency in which the announcement is created.

8.4.6.4.5 Most agencies will not use this field.

8.4.6.5 *Agency*

8.4.6.5.1 If the announcement is intended for a single agency, select that agency's name.

8.4.6.5.1.1 It may be necessary to create multiple announcements in order to limit the announcement to specific agencies.

8.4.6.5.1.2 For example, if an announcement needs to be made only to providers with treatment locations in Benton County, and if ten agencies have treatment locations in Benton County, the announcement will have to be created ten times—one for each agency with a treatment location in Benton County.

8.4.6.6 *Priority*

8.4.6.6.1 Select "Normal" if the announcement is not urgent.

8.4.6.6.1.1 The announcement text on the agency Home Page will appear black.

8.4.6.6.2 Select "High" if the announcement is urgent or otherwise time-sensitive.

8.4.6.6.2.1 The announcement on the agency Home Page will appear in red text.

8.4.6.7 *Start Date*

8.4.6.7.1 Enter the date on which the announcement should first appear.

8.4.6.7.2 This date may be in the future.

8.4.6.8 *End Date*

8.4.6.8.1 Enter the last date on which the announcement should appear.

8.4.6.8.2 This date may match the Start Date (see 8.4.6.7) if the announcement should only appear for 24 hours.

8.4.6.8.3 On the day following the date entered in this field, the announcement will be deleted.

8.4.6.8.3.1 This date may be changed at any time prior to this point.

8.4.6.8.4 To avoid complacency and ignored announcements, AMH recommends that this date should not be more than 2-4 weeks in the future unless the information contained in the announcement is relevant for a longer period of time.

8.4.6.9 *Sort Order*

8.4.6.9.1 If multiple announcements will display on the agency Home Page, they may be sorted in any order.

8.4.6.9.2 Enter a number in this field to indicate where each announcement should appear on the agency Home Page.

8.4.6.9.3 OWITS will sort announcements with blank Sort Order fields before announcements with filled Sort Order fields.

8.4.6.9.4 OWITS will not sort "High" priority announcements above "Normal" priority announcements.

8.4.6.9.5 OWITS will not automatically sort the announcements by sort order on the Announcement List screen.

8.4.7 Click Finish to return to the Announcement List screen.

8.4.8 Announcements can be viewed, modified, and deleted from the Announcement List screen (Agency > Agency List > Announcements).

8.4.8.1 Click the "Review" link in the Actions column to make modifications to the announcement.

8.4.8.2 Click the "Delete" link in the Actions column to delete an announcement prior to the End Date (8.4.6.8).

8.4.9 Announcements can be viewed in a read-only format from the agency Home Page.

8.4.9.1 Click the "Review" link in the Actions column to see the details of the announcement.

8.5 Agency > Agency List > Removed Consents

8.5.1 This module is not currently used in OWITS.

8.6 Agency > Agency List > Wait List

8.6.1 The agency wait list displays the names and details of clients who are waiting to be enrolled to programs within the current agency and facility.

8.6.1.1 Full Name: The client's name.

8.6.1.2 Program: The facility program for which the client is waiting.

8.6.1.3 Staff: The name of the staff member who placed the client on the waiting list.

8.6.1.4 Pregnant: Indicates whether a female client was pregnant at the time her name was added to the waiting list.

8.6.1.5 Due: If a female client was pregnant at the time her name was added to the waiting list, this column will display her estimated due date.

8.6.1.6 Dual Diag: Indicates whether the client requires treatment or services for both mental health and substance abuse problems.

8.6.1.7 IV Drugs: Indicates whether the client is currently using injection drugs or is seeking treatment or services related to the cessation of injection drug use.

8.6.1.8 Interim Ser: Indicates whether the client will be receiving treatment or services in the facility but outside of the program for which he or she is waiting.

8.6.1.9 Placement Asst: This field is not currently used in OWITS.

8.6.1.10 Start Date: The date on which the client's name was added to the waiting list, which is the beginning of the waiting period.

8.6.2 The entries in the wait list are created when clients are placed on a waiting list as part of their Activity List (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

8.6.3 To view the wait list entry for a specific client, click the "Review" link in the Actions column.

8.6.3.1 The wait list entry will display as it was recorded in the client's Activity List.

8.6.3.2 Note that the client is now selected.

8.6.3.2.1 His or her name will appear in the Locator at the top of the screen.

8.6.3.2.2 Additional actions taken which affect client records will be applied to this client unless another client is selected.

8.6.3.3 The wait list entry can be modified as needed.

8.6.3.4 The client can be admitted to the facility from this screen by clicking the "Admit Client" link below the Comments field.

8.6.3.4.1 The Admission Profile screen (Client List > Activity List > Admission > Profile) will be displayed.

8.6.3.4.2 For instructions for admitting a client to a facility and completing the Admission sequence, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

8.6.3.5 Click Cancel or Finish on the Client Wait List screen to return to the agency Wait List screen.

8.6.4 An informational message will appear on the facility Home Page indicating the number of clients or potential clients currently recorded on the facility's wait list.

8.7 Agency > Agency List > Deleted Clients

8.7.1 Client profiles that have been deleted from the agency are referenced on this screen, including the name of the user who created the profile and the date that it was deleted.

8.7.2 The list of clients in the Deleted Clients table can be filtered using the "Start Date" and "End Date" fields at the top of the screen.

8.7.3 This information is provided for historical reference purposes only.

8.8 Agency > TX Team Groups

8.8.1 Treatment teams consisting of agency staff (see 6.0) and client collateral contacts can be created to indicate who is providing or responsible for providing treatment and services to clients.

8.8.1.1 For details on the use of the treatment team (TX Team) modules and collateral contacts, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

8.8.2 To simplify the treatment team creation process for each client, treatment team groups can be created.

8.8.2.1 A treatment team group is used to add multiple agency staff members at once to an individual client's treatment team.

8.8.2.2 Collateral contacts cannot be added to a treatment team group.

8.8.3 To create and view treatment team groups, navigate to Agency > TX Team Groups.

8.8.3.1 Any existing treatment team groups will be displayed.

8.8.3.2 To view or modify the details of an existing treatment team group, click the "Review" link in the Actions column.

8.8.3.3 Follow the steps described in sections 8.8.7 through 8.8.9 for adding new staff members to the treatment team group.

8.8.3.4 To remove a staff member from the treatment team group, click the "Delete" link in the Actions column.

8.8.3.4.1 Deleting a staff member from the treatment team group does not delete his or her profile (see 6.2) or other related records.

8.8.4 To create a new treatment team group, click the "Add New Treatment Team Group Record" link in the Treatment Team Group List bar.

8.8.5 Complete the two required fields (and the one non-required field, if desired) on the Treatment Team Group Profile screen.

8.8.5.1 *Group Name*

8.8.5.1.1 Enter a name by which the treatment team group will be known in OWITS.

8.8.5.1.2 Limit group names to no more than 64 characters (32 characters or fewer is preferred in order to fit the whole group name into an option transfer box).

8.8.5.2 *Group Start Date*

8.8.5.2.1 Enter the date on which the treatment team group was formed or was first identified as a treatment team.

8.8.5.3 *Group End Date*

8.8.5.3.1 Enter the date after which the treatment team group will no longer be assigned to clients in OWITS.

8.8.6 Click Save

8.8.7 Add staff members to the treatment team group.

8.8.7.1 Click the "Add Staff to Group" link in the Treatment Team Staff List bar.

8.8.7.2 In the Name field, select the name of the staff member to be added.

8.8.7.2.1 To record staff as members of a treatment team group, staff profiles must first be created (see 6.5).

8.8.7.2.2 Treatment team groups apply to the entire agency, not to individual facilities

8.8.7.3 In the Role field, select the option that best describes the selected staff member's responsibilities within the treatment team group.

8.8.7.3.1 The option selected in this field will appear associated with the staff member's name in other OWITS modules or screens where the treatment team applies, such as the client's treatment plan (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

8.8.7.4 Click Save or Finish to apply the staff member's name with his or her selected role to the treatment team group.

8.8.7.5 Repeat steps 8.8.7.1 to 8.8.7.4 until all the desired staff members have been added to the treatment team group.

8.8.8 Click Finish to return to the Treatment Team Group List screen.

8.8.9 Repeat steps 8.8.4 through 8.8.8 until all the desired treatment team groups have been created.

8.9 Agency > Non-Staff Physicians

8.9.1 This module records names and information of individuals who regularly work with or for the agency or facility and provide services to clients but who will not use OWITS, be included in client treatment teams, or manage agency or facility staff members.

8.9.2 To create a record for a non-staff physician, navigate to Agency > Non-Staff Physicians.

8.9.2.1 All physicians currently on record as associated with the agency will be displayed on this screen.

8.9.3 Click the "Add New Physician Record" link in the Physician List heading.

8.9.4 Complete the necessary fields.

8.9.4.1 *First Name*

8.9.4.1.1 Enter the physician's first name.

8.9.4.1.2 Avoid using nicknames in this field.

8.9.4.2 *MI*

8.9.4.2.1 Enter the physician's middle initial.

8.9.4.2.2 This is a required field; if the physician does not have a middle name or initial, enter X.

8.9.4.3 *Last Name*

8.9.4.3.1 Enter the physician's last name.

8.9.4.3.2 Verify that the last name is accurate and correctly spelled.

8.9.4.4 *Suffix*

8.9.4.4.1 Enter any abbreviated suffixes associated with the physician's name.

8.9.4.4.2 This might include familiar references "Sr." (senior) or "Jr." (junior).

8.9.4.4.3 This might include professional credentials (see 6.5.5.4).

8.9.4.5 *SSN*

8.9.4.5.1 Enter the physician's Social Security Number.

8.9.4.5.2 This is a required field; if the physician refuses to provide his or her Social Security Number, enter 000-00-0001.

8.9.4.5.3 Please use caution—the physician's Social Security Number will be visible to all other staff members with access to staff records (see 6.5.10.5.3 or 6.5.10.5.6).

8.9.4.6 *EIN*

8.9.4.6.1 Enter the physician's Employer Identification number.

8.9.4.6.2 The number must be nine digits long and use the following format: 12-3456789.

8.9.4.6.3 This is a required field; if the physician does not have an EIN or refuses to provide it, enter 00-0000000 (two zeroes, a hyphen, and seven more zeroes).

8.9.4.7 *Email*

8.9.4.7.1 If applicable, enter the physician's primary email address.

8.9.4.8 *Phys Status*

8.9.4.8.1 Select the option that best describes the physician's current state of practice.

8.9.4.9 *Taxonomy*

8.9.4.9.1 Use these three fields to describe the physician's field of expertise.

8.9.4.9.2 The option selected in the Category field will determine what options are available in the Sub-Category field.

8.9.4.9.3 The option selected in the Sub-Category field will determine what options are available in the Specialty field.

8.9.4.9.4 See Appendix D – Staff Profile and Non-Staff Physician Taxonomy Table for a breakdown of the available options.

8.9.4.9.5 To avoid errors, this should be the last section of this screen that is completed.

8.9.5 When all required fields have been filled (and others if necessary), click the right arrow to advance to the Address screen.

8.9.5.1 In the first seven fields, enter the physician's phone number(s).

8.9.5.1.1 The "Emergency(P) #" field refers to an emergency phone number to use to call the physician's personal or family emergency contact.

8.9.5.1.2 The "Emergency(W) #" field refers to an emergency phone number to use to call the physician's work or professional emergency contact.

8.9.5.2 The email address field will automatically populate with the address from the matching field on the Non-Staff Physician Profile screen (see 8.9.4.7).

8.9.5.3 Use the "Preferred Method of Contact" field to indicate how the physician prefers to receive communication.

8.9.5.3.1 Agency managers and supervisors may use this field to determine the best way to contact a physician.

8.9.5.3.2 OWITS system administrators at AMH will use this field as a reference if they need to contact the physician.

8.9.5.4 To add an address, click the "Add Address" link in the "Addresses" heading.

8.9.5.4.1 Add an address by completing the address fields in the Address Information section of this screen.

8.9.5.4.2 Only one address can be recorded for each Address Type.

8.9.5.4.3 Select "Yes" in the Confidential field to hide the address from OWITS users at other agencies.

8.9.5.4.4 When the address has been entered, click Finish to return to the Contact Info screen.

8.9.6 When all phone numbers and addresses have been entered, click Finish to return to the Physician List screen.

8.10 Agency > Contract Management

8.10.1 The Contract Management module is used exclusively by ATR providers.

8.10.2 Instructions for its use are provided in the ATR User Guides.

8.10.3 To obtain copies of the ATR User Guides, please contact the OWITS system administrators at AMH (owits.support@state.or.us).

8.11 Agency > MU Calculation

8.11.1 The MU Calculation screen was designed and integrated into OWITS primarily for the purpose of meeting Meaningful Use certification criteria.

8.11.2 Its current functionality is limited pending the definition of further requirements from the Centers for Medicare and Medicaid Services.

8.11.3 Agency and facility staff may currently use the fields available on this screen to manually produce calculations and create a printable report.

8.11.3.1 *Staff*

8.11.3.1.1 Type the first few letters of the staff member's *last name* and click the magnifying glass to the right of the field.

8.11.3.1.2 OWITS will search the agency records for staff members whose last names match the letters entered.

8.11.3.1.2.1 If one matching staff record is found, the name will automatically appear.

8.11.3.1.2.2 If multiple matching staff records are found, use the resultant drop-down menu to select the correct staff member.

8.11.3.1.3 This field may be left blank to indicate the entire agency.

8.11.3.2 *Start Date*

8.11.3.2.1 Enter the earliest date of the data to be calculated.

8.11.3.2.2 This field may be left blank to indicate no start date or the beginning of OWITS records.

8.11.3.3 *End Date*

8.11.3.3.1 Enter the latest date of the data to be calculated.

8.11.3.3.2 This field may be left blank to indicate no end date or the end of OWITS records.

8.11.3.4 *# of Unique Patients Seen Meeting Numerator Criteria*

8.11.3.4.1 Enter the number of clients whose records meet the description in the Meaningful Use Objective column.

8.11.3.4.2 Example: If the Meaningful Use Objective selected is "Record smoking status for patients 13 years old or older" (tenth line), and if 27 clients who are 13 or older have a smoking status recorded in their client record, enter 27 in this field.

8.11.3.4.2.1 Smoking status is recorded on the Tobacco screen in Client List > Activity List > Admission (see OWITS Reference Manual, Volume 5: Client Activity and Contact) and in some assessment tools (see OWITS Reference Manual, Volume 6: Assessments).

8.11.3.5 *# of Unique Patients Meeting Denominator Criteria*

8.11.3.5.1 Enter the maximum number of clients whose records could meet the description in the Meaningful Use Objective column.

8.11.3.5.2 Example: If the Meaningful Use Objective selected is "Record smoking status for patients 13 years old or older" (tenth line), and if the staff member indicated in the staff field (8.11.3.1) has created records for 95 clients who are 13 or older, enter 95 in this field.

8.11.3.6 *% of Patients Meeting Criteria*

8.11.3.6.1 Click the Calculate button below the Meaningful Use table.

8.11.3.6.2 The values in these fields will automatically populate, calculated by dividing the second column (8.11.3.5) by the first column (8.11.3.4).

8.11.3.6.3 Example: If the Meaningful Use Objective selected is "Record smoking status for patients 13 years old or older" (tenth line), if the values in the first and second columns are respectively 27 and 95, this field will display 28%, indicating that 28% of clients who are 13 or older have been asked about their tobacco use and have had their response recorded in OWITS.

8.11.4 When values have been entered into the first two columns of the Meaningful Use table (8.11.3.4 and 8.11.3.5), click Calculate.

8.11.4.1 A percentage will appear in the third column of the Meaningful Use table (8.11.3.6) indicating the percentage of clients who meet each Meaningful Use Objective for which values have been entered.

8.11.5 This screen may be printed for internal agency use and reference.

8.11.5.1 Click the Printable View icon near the top of the screen.

8.11.5.2 The screen will appear in a pop-up browser window.

8.11.5.3 If desired, print the Meaningful Use Calculation.

8.11.5.4 When finished, close the pop-up window.

8.11.6 Click Clear to remove all values entered in all the fields on this screen.

8.12 Agency > GPRA Discharge Due

8.12.1 The GPRA Discharge Due module is used exclusively by ATR providers.

8.12.2 Instructions for its use are provided in the ATR User Guides.

8.12.3 To obtain copies of the ATR User Guides, please contact the OWITS system administrators at AMH (owits.support@state.or.us).

8.13 Agency > GPRA Followup Due

8.13.1 The GPRA Followup Due module is used exclusively by ATR providers.

8.13.2 Instructions for its use are provided in the ATR User Guides.

8.13.3 To obtain copies of the ATR User Guides, please contact the OWITS system administrators at AMH (owits.support@state.or.us).

9.0 System Usage and Client Access History

9.1 Agency > System Usage

9.1.1 System Usage functions similar to the Staff System Usage screen (see 7.6) but offers search capabilities.

9.1.2 This screen allows OWITS system administrators to view all agency staff members' logon and logoff activities.

9.1.3 Use the search fields to locate the desired activity or range of activities.

9.1.3.1 The First Name and Last Name fields will accept wildcards.

9.1.3.2 The IP address field requires one of the following formats:
123.456.789.12
123.456.789.123

9.1.3.3 The Activity Date field will only search for a single date or date ranges.

9.1.3.4 The Activity field will filter the results by "Logon" or "Logoff" events.

9.2 Agency > Client Access History

9.2.1 This screen allows OWITS system administrators to view a list of the parts of client records that have been viewed or modified.

9.2.2 Use the search fields as needed to locate the desired client record information.

9.2.2.1 *Client Name*

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

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

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

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

9.2.2.2 *Staff Name*

9.2.2.2.1 Type the first few letters of the staff member's *last name* and click the magnifying glass to the right of the field.

9.2.2.2.2 OWITS will search the agency records for staff members whose last names match the letters entered.

9.2.2.2.2.1 If one matching staff record is found, the name will automatically appear.

9.2.2.2.2.2 If multiple matching staff records are found, use the resultant drop-down menu to select the correct staff member.

9.2.2.3 *Date Changed*

9.2.2.3.1 To locate a specific record change or client record activities on a specific day, enter the date in this field.

9.2.2.4 *Access Type*

9.2.2.4.1 To locate a specific type of change to client records, select it in this field.

9.2.3 Click Go to apply the search.

9.2.4 The Client Access History List will display the results of the search.

9.2.4.1 The Client ID and Client Name columns identify the client record in which activity occurred.

9.2.4.2 The Access Type column displays a categorical description of the activity that occurred in the client's record.

9.2.4.3 The Date column displays the date and time the activity occurred in the client's record.

9.2.4.3.1 Times displayed in this column are in the Eastern Time Zone.

9.2.4.4 The Description column provides some information about the activity that occurred in the client's record.

9.2.4.4.1 Example: Accessed Admission Screen for Case: 1

9.2.4.4.2 Example: Home Phone changed from '(503) 555-1234' to '(503) 555-5678'.

9.2.4.4.3 Example: Client Program Enrollment was added.

9.3 Like the Staff System Usage screen (7.6.4), these modules may be used to identify suspicious activity (see OWITS Reference Manual, Volume 15: AMH Policies), inappropriate access to client records, or incorrect changes.

10.0 Billing

10.1 For a detailed explanation of the Billing module and instructions for its setup and use, see OWITS Reference Manual, Volume 11: Billing.

10.2 The Claim Item List displays exportable lists of services rendered to agency clients and whether the service is ready to be submitted for payment (sent to the Claim Batch List).

10.3 The Claim Batch List displays exportable lists of batches of services and whether the batch has been billed.

10.4 The Encounter List screen displays exportable lists of services rendered to agency clients in encounter records, including details of the program, the rendering staff, and whether the encounter has been completed so that it can be billed (sent to the Claim Item List).

10.5 The EOB Transaction List refers to an explanation of benefits and lists services provided.

10.6 The Payments screens display exportable lists of payments received from agency clients or from other funding sources on behalf of clients.

10.7 The Billing Transaction List displays information about charges, adjustments, and payments.

10.8 The Client Balance screen displays an exportable list of agency clients and the current balance due for services rendered.

10.9 The Clearing House Item screen is not currently used in OWITS.

10.10 The Clearing House Batch screen is not currently used in OWITS.

10.11 The Cost Center screen is not currently used in OWITS.

10.12 The Payor Plan List is used to establish and review funding sources available to agencies and facilities for payment for services rendered.

11.0 Alerts

11.1 Alerts are system-generated messages to users about important tasks or approaching deadlines.

11.2 Agencies and facilities may set up recurring alerts for a variety of situations and customize the alert message that appears to users on the agency Home Page (see OWITS Reference Manual, Volume 1: OWITS Basics).

11.2.1 Alerts are generated by FEi through a batching system that runs during non-business hours.

11.2.2 Alerts created prior to this batching process will not display until the following business day, even if the system criteria to cause the alert are present.

11.3 Creating Alerts

11.3.1 In the Navigation View, navigate to Agency > Alerts Configuration.

11.3.2 Click the "Add New Alert" link in the blue Alert Configuration List bar.

11.3.3 Fill all fields with the relevant alert information.

11.3.3.1 *Configuration Type*

11.3.3.1.1 Select "Agency" to create an alert for the entire agency or for all staff members within the agency who have specific roles.

11.3.3.1.1.1 Selecting "Agency" will make the Agency Type field (11.3.3.2) unavailable.

11.3.3.1.1.2 Selecting "Agency" will create option transfer boxes that can be used to apply the alert only to specific facilities within the agency (see 11.3.3.13).

11.3.3.1.2 Select "Agency Type" to create an alert for multiple OWITS agencies (see 11.3.3.2.2) or for all OWITS users who have specific roles.

11.3.3.1.2.1 Only OWITS system administrators are able to create system-wide alerts.

11.3.3.2 *Agency Type*

11.3.3.2.1 This field will only be available if "Agency Type" was selected in the Configuration Type field (11.3.3.1).

11.3.3.2.2 If the alert is intended for multiple agencies that offer similar services, select the agency type to which the alert will be displayed.

11.3.3.2.2.1 It may be necessary to create multiple alert configurations in order to limit the alert to specific agency types.

11.3.3.3 *Alert Name*

11.3.3.3.1 Create a name for the alert.

11.3.3.3.2 This will appear as the title of the alert on the agency Home Page and the Alerts Configuration screen.

11.3.3.3.3 Limit the alert name to 50 characters or fewer, including spaces.

11.3.3.4 *Alert Type*

11.3.3.4.1 Select the desired alert.

11.3.3.4.2 Each alert type has unique conditions.

11.3.3.4.3 See section 11.4 for a more detailed explanation of each alert type.

11.3.3.4.4 See Appendix E – Alert Types, Categories, Trigger Points, and Descriptions for a quick reference of alert types.

11.3.3.5 *Trigger Point*

11.3.3.5.1 The Alert Type selected (11.3.3.4) will determine the trigger point.

11.3.3.5.2 This field will automatically populate with the system actions or circumstances that will activate the alert.

11.3.3.6 *Alert Category*

11.3.3.6.1 The Alert Type selected (11.3.3.4) will determine the alert category.

11.3.3.6.2 This field will automatically populate to indicate whether the alert refers to data in client records or in agency records.

11.3.3.7 *Alert Description*

11.3.3.7.1 The Alert Type selected (11.3.3.4) will determine the alert description.

11.3.3.7.2 This field will automatically populate with a general description of the alert and user activities associated with it.

11.3.3.8 *What message should appear to users?*

11.3.3.8.1 In this text box, enter a message for users to read and acknowledge when they view the alerts that appear on the agency Home Page.

11.3.3.8.2 This message can include notifications of data changes or additions as well as instructions for follow-up tasks.

11.3.3.9 *When is the next activity due (days after the trigger point)?*

11.3.3.9.1 The value in this field determines the due date for the action required by the alert.

11.3.3.9.2 Enter the number of days after the trigger point (11.3.3.5) after which the activity required by the alert should be performed.

11.3.3.9.3 If the activity is due on the day the trigger point is reached, enter 0.

11.3.3.9.4 If the activity is due within one month after the trigger point is reached, enter 30.

11.3.3.10 *How many days prior to the due date should this alert show up?*

11.3.3.10.1 The due date is determined by the number of days after the trigger point (see 11.3.3.9).

11.3.3.10.2 The value in this field determines the first date on which the alert notification will appear on the agency Home Page.

11.3.3.10.3 Enter the number of days prior to the due date that the alert should appear on the agency Home Page.

11.3.3.10.4 To make the alert appear on the due date, enter 0.

11.3.3.10.5 To make the alert appear a month prior to the due date, enter 30.

11.3.3.10.6 If this field is 10 and the due date is 10 days after the trigger point, the alert will appear on the day that the trigger point is reached.

11.3.3.10.7 If this field is 10 and the due date is 30 days after the trigger point, the alert will appear 20 days after the trigger point is reached.

11.3.3.11 *Which staff should receive the message?*

11.3.3.11.1 Alerts will appear on the agency Home Page for users who have specific assigned roles (see 6.5.10.5) or who have performed specific actions within the system.

11.3.3.11.2 It may be necessary to create multiple similar alerts in order to display the alert to all relevant users.

11.3.3.11.3 If multiple similar alerts are created with different values in this field, some users with overlapping assigned roles or system actions will see more than one alert with the same information.

11.3.3.12 *Should message turn red when overdue?*

11.3.3.12.1 Select "Yes" to make the alert title appear in red text on the agency Home Page when the due date (11.3.3.9) has passed.

11.3.3.12.2 Select "No" to keep the alert in black text on the agency Home Page after the due date has passed.

11.3.3.13 *Which facilities follow these rules?*

11.3.3.13.1 These option transfer boxes only appear if "Agency" is selected as the Configuration Type (11.3.3.1).

11.3.3.13.2 Select facilities to *exclude* them from the alert.

11.3.3.13.3 Selected facilities will be *exempt* from this alert, and selected facility staff will not see this alert.

11.3.3.14 *Alert should stop being displayed this many days after it is generated:*

11.3.3.14.1 The value in this field determines the expiration date for the notifications generated by this alert.

11.3.3.14.2 Enter the number of days the alert should continue to appear on the agency Home Page after the day it first appeared (see 11.3.3.10).

11.3.3.14.3 To make the alert appear for one week, enter 7.

11.3.3.14.4 To make the alert appear for one year, enter 365.

11.3.3.15 *Effective Date*

11.3.3.15.1 Enter the first date on which the alert should appear.

11.3.3.15.2 OWITS will scan for the activity or conditions that trigger this alert only on or after this date.

11.3.3.15.3 The alert notification will not appear on the agency Home Page prior to this date, even if the necessary trigger conditions are met.

11.3.3.16 *Expiration Date*

11.3.3.16.1 Enter the last date on which the alert should appear.

11.3.3.16.2 OWITS will scan for the activity or conditions that trigger this alert only prior to this date.

11.3.3.16.3 The alert notification will no longer appear on the agency Home Page after this date, even if the necessary trigger conditions are met.

11.3.4 Click Finish to return to the Alert Configuration screen.

11.4 Alert Types

11.4.1 *Annual MH Assessment*

11.4.1.1 Agencies or facilities that administer mental health assessments may use this alert to remind staff that a client is due for a yearly assessment.

11.4.2 *ASAM Update*

11.4.2.1 Agencies or facilities that use the ASAM assessment (see OWITS Reference Manual, Volume 6: Screenings and Assessments) may use this alert to remind staff to conduct an ASAM (new or follow-up) with the client.

11.4.2.2 Additional Fields:

11.4.2.2.1 *Include cases where no level of care indicated*

11.4.2.2.1.1 Select "Yes" to apply the alert to clients who do not have a completed ASAM on record for the current episode.

11.4.2.2.1.2 Select "No" to apply the alert only to clients who have a complete ASAM on record for the current episode.

11.4.2.2.2 *Levels of Care – Modify for these Levels of Care*

11.4.2.2.2.1 Select the levels of care (ASAM outcomes) to which this alert will be applied.

11.4.2.2.2.2 For example, select “Residential” to produce the alert only for clients who have “Residential” as the level of care indicated by their most recent ASAM.

11.4.3 *Client Group Enrollment Expiring*

11.4.3.1 This alert notifies staff members when a client’s enrollment in a Payor Plan (see OWITS Reference Manual, Volume 5: Client Activity and Contact) has expired or will expire soon.

11.4.3.2 Suggested uses include reminding the staff members to verify the client’s enrollment in the Payor Plan to determine if the expiration date can be extended, if the client can be enrolled in a different Payor Plan, if the client must find some other form of payment, etc.

11.4.4 *Client Intake Creation*

11.4.4.1 This alert notifies staff members when a new Intake record (see OWITS Reference Manual, Volume 5: Client Activity and Contact) has been created for an agency client.

11.4.4.2 Suggested uses include reminding the staff member that the next step is to schedule an appointment with the client, perform a drug screening, or update the client’s profile.

11.4.5 *Client Profile Creation*

11.4.5.1 This alert notifies staff members when a new profile has been created for an agency client (see OWITS Reference Manual, Volume 4: Client Profile).

11.4.5.2 Suggested uses include reminding the staff member that the next step is to complete the Intake record, schedule an appointment with the client, or assign a treatment team.

11.4.6 *Client Turning Age (x)*

11.4.6.1 This alert notifies staff members when a client will reach or has reached a specified age.

11.4.6.2 Suggested uses include reminding the staff member that the next step is to move the client from a program for one age range and into a program for the next higher age range, to discharge an adult client from a youth-only facility, to discuss the client’s Medicare enrollment, etc.

11.4.6.3 The “When is the next activity due” field (11.3.3.9) is used to indicate the desired alert age as measured in days (not years).

11.4.7 *Close Discharged Case*

11.4.7.1 This alert notifies staff members when a discharge record has been completed, no new admission record has been completed, and the case (Intake) is still open (see OWITS Reference Manual, Volume 9: Client Discharge).

11.4.7.2 Cases (Intakes) for clients discharged from treatment or services at a facility should be closed within 30 days of the date of discharge (see OWITS Reference Manual, Volume 15: AMH Policies) unless the client returns for additional treatment.

11.4.7.3 A system-wide alert has been created to notify OWITS users of clients whose case remains open more than 30 days after the creation of a discharge record.

11.4.7.3.1 Agency policies must indicate what conditions are necessary for a returning client to require a new Intake or just a new Admission if the client returns within 30 days from the date of discharge.

11.4.8 *Consent Creation*

11.4.8.1 This alert notifies staff members when a consent (release of information) record (see OWITS Reference Manual, Volume 8: Consent and Referrals) has been created for a client.

11.4.8.2 Suggested uses include reminding the staff member that the consent must be signed by the client within a specific time frame or that a referral should be entered and sent to another agency.

11.4.9 *Consent Expiration*

11.4.9.1 This alert notifies staff members that a consent (release of information) record (see OWITS Reference Manual, Volume 8: Consent and Referrals) has expired or will expire soon.

11.4.9.1.1 As of the expiration date, released client information will no longer be available to other agencies or facilities, based on the settings applied to the consent record.

11.4.9.2 Suggested uses include reminding the staff member to extend the expiration date, create a new consent (release of information) record, or verify that the released information is no longer in use.

11.4.10 *Eligibility Determination Due*

11.4.10.1 Agencies or facilities that use the Client Eligibility module (see OWITS Reference Manual, Volume 5: Client Activity and Contact) may use this alert to identify clients who have gone through the eligibility process but do not have an eligibility determination on file.

11.4.11 *Encounter Creation*

11.4.11.1 This alert notifies staff members that an encounter note has been created.

11.4.11.2 Suggested uses include notifying staff members who are responsible for signing the encounter notes so that encounters are not left unsigned.

11.4.12 *Encounter Released to Billing*

11.4.12.1 This alert notifies staff members that an encounter note has been completed and released to billing.

11.4.12.2 Suggested uses include notifying staff members who are responsible for billing and EDI of this event so that the data can be processed accordingly

11.4.13 *Expired Collateral Consent*

11.4.13.1 This alert notifies staff members that a consent (release of information) for a client's collateral contact (see OWITS Reference Manual, Volume 5: Client Activity and Contact) has expired or will expire soon.

11.4.13.2 Suggested uses include reminding staff members to contact the collateral contact to obtain a new or updated consent to release information, removing the collateral contact from the client records, replacing the collateral contact, etc.

11.4.14 *GPRA Followup Due*

11.4.14.1 This alert is used exclusively by ATR providers.

11.4.14.2 Instructions for ATR records are provided in the ATR User Guides.

11.4.14.3 To obtain copies of the ATR User Guides, please contact the OWITS system administrators at AMH (owits.support@state.or.us).

11.4.15 *Inactive Client*

11.4.15.1 This alert can be used to identify clients who have not received treatment or services for a given period of time.

11.4.15.2 Example: agency policies indicate that records should be closed for clients who have not received treatment or services within the past year.

11.4.15.2.1 The due date value (11.3.3.9) would be 365, indicating one year past the most recent encounter note or miscellaneous note.

11.4.15.2.2 The first alert date value (11.3.3.9) could be 30, indicating that the client has not received treatment or services within 11 months.

11.4.15.2.3 Staff could be instructed to attempt to contact the client and/or verify that encounter notes and miscellaneous notes are being entered correctly, then close the client's records after 30 days if no contact is made.

11.4.16 *Initial MH Assessment*

11.4.16.1 Agencies or facilities that administer mental health assessments may use this alert to remind staff that a client has not yet participated in his or her first mental health assessment.

11.4.17 *Initial Treatment Plan*

11.4.17.1 Agencies or facilities that use the Treatment Plan module (see OWITS Reference Manual, Volume 5: Client Activity and Contact) may use this alert to identify clients who have been admitted for treatment but who do not yet have a treatment plan on file.

11.4.17.2 This alert can be applied to clients with or without ASAM assessments on record.

11.4.17.3 Additional Fields:

11.4.17.3.1 *Include cases where no level of care indicated*

11.4.17.3.1.1 Select "Yes" to apply the alert to clients who do not have a completed ASAM on record for the current episode.

11.4.17.3.1.2 Select "No" to apply the alert only to clients who have a complete ASAM on record for the current episode.

11.4.17.3.2 *Levels of Care – Modify for these Levels of Care*

11.4.17.3.2.1 Select the levels of care (ASAM outcomes) to which this alert will be applied.

11.4.17.3.2.2 For example, select "Residential" to produce the alert only for clients who have "Residential" as the level of care indicated by their most recent ASAM.

11.4.18 *Periodic Fee Determination Due*

11.4.18.1 Agencies or facilities that use the Fee Determination module (see OWITS Reference Manual, Volume 5: Client Activity and Contact) may use this alert to identify clients who have had one fee determination recorded and are due for an update.

11.4.18.2 Example: agency policies indicate that fee determinations must be performed every six months.

11.4.18.2.1 The due date value (11.3.3.9) would be 182, indicating six months past the effective date of the most recent fee determination.

11.4.18.2.2 The first alert date value (11.3.3.9) could be 7, indicating that a new fee determination should be conducted within the next week.

11.4.18.2.3 Staff could be instructed to contact the client to complete the fee determination update.

11.4.19 *Reauthorization Due*

11.4.19.1 This alert is not currently used in OWITS

11.4.20 *Referral Creation*

11.4.20.1 This alert notifies staff members that a referral has been created for a client.

11.4.20.2 Suggested uses include instructing staff members to verify that the client was referred to another agency and contacting that agency to verify that the client made or kept an appointment.

11.4.21 *Referrals In*

11.4.21.1 This alert notifies staff members that another agency has referred a client for treatment or services.

11.4.21.2 Suggested uses include instructing staff members to contact the client to schedule an appointment or reviewing the data received with the referral to determine if all the necessary information was received.

11.4.22 *Staff Recertification Due*

11.4.22.1 This alert produces notifications that staff members' professional certifications (see 6.5.9) have expired or will soon expire.

11.4.22.2 Suggested uses include reminding staff members or their managers to begin the process of renewing the certifications and to update the certification in OWITS.

11.4.23 *Treatment Plan Review*

11.4.23.1 Agencies or facilities that use the Treatment Plan module (see OWITS Reference Manual, Volume 5: Client Activity and Contact) may use this alert to identify clients who have a completed and signed treatment team that needs to be reviewed or that will need to be reviewed soon.

11.4.23.2 This alert can be applied to clients with or without ASAM assessments on record.

11.4.23.3 Additional Fields:

11.4.23.3.1 *Include cases where no level of care indicated*

11.4.23.3.1.1 Select "Yes" to apply the alert to clients who do not have a completed ASAM on record for the current episode.

11.4.23.3.1.2 Select "No" to apply the alert only to clients who have a complete ASAM on record for the current episode.

11.4.23.3.2 *Levels of Care – Modify for these Levels of Care*

11.4.23.3.2.1 Select the levels of care (ASAM outcomes) to which this alert will be applied.

11.4.23.3.2.2 For example, select "Residential" to produce the alert only for clients who have "Residential" as the level of care indicated by their most recent ASAM.

11.4.24 *Treatment Plan Review Approval Required*

11.4.24.1 Agencies or facilities that use the Treatment Plan Review module (see OWITS Reference Manual, Volume 5: Client Activity and Contact) may use this alert to identify treatment plans that have not been signed off by all associated staff members.

11.4.25 *Voucher Creation*

11.4.25.1 This alert is used exclusively by ATR providers.

11.4.25.2 Instructions for ATR records are provided in the ATR User Guides.

11.4.25.3 To obtain copies of the ATR User Guides, please contact the OWITS system administrators at AMH (owits.support@state.or.us).

11.5 Editing Alerts

11.5.1 In the Navigation View, navigate to Agency > Alerts Configuration.

11.5.2 Enter search criteria into the available fields and click Go to see available alerts.

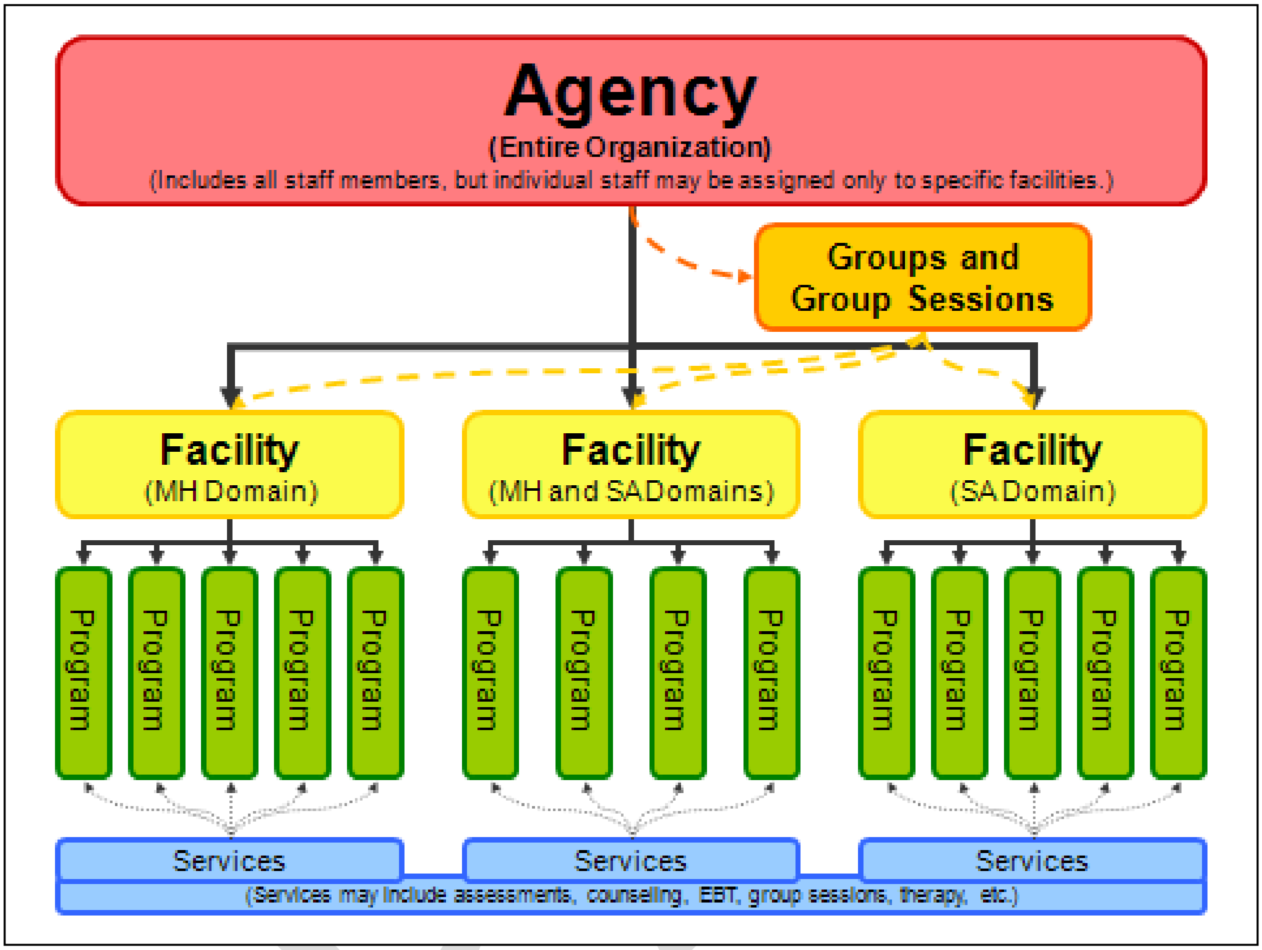
11.5.3 Click the "Review" link in the Actions column for the desired alert.

11.5.4 Modify field contents as needed to reconfigure the alert to current needs.

11.5.5 Click Save.

11.5.6 Click Finish to return to the Alert Configuration screen.

Appendix A – Agency, Facility, and Program Record Structure



Appendix B – Operating Hours Table (Examples)

Example 1: Range 1 Only (4.7.3.1)

	Range 1		Range 2		Range 3	
Day	Open	Close	Open	Close	Open	Close
Monday	8:00 AM	5:00 PM				
Tuesday	8:00 AM	5:00 PM				
Wednesday	8:00 AM	5:00 PM				
Thursday	8:00 AM	5:00 PM				
Friday	8:00 AM	5:00 PM				
Saturday	10:00 AM	4:00 PM				
Sunday						

Example 2: Ranges 1 and 2 (4.7.3.2)

	Range 1		Range 2		Range 3	
Day	Open	Close	Open	Close	Open	Close
Monday	7:00 AM	11:00 AM	1:00 PM	6:00 PM		
Tuesday	7:00 AM	11:00 AM	1:00 PM	6:00 PM		
Wednesday	7:00 AM	11:00 AM	1:00 PM	6:00 PM		
Thursday	7:00 AM	11:00 AM	1:00 PM	6:00 PM		
Friday	7:00 AM	11:00 AM	1:00 PM	6:00 PM		
Saturday	10:00 AM	2:00 PM	6:00 PM	9:00 PM		
Sunday						

Example 3: Ranges 1, 2, and 3 (4.7.3.3)

	Range 1		Range 2		Range 3	
Day	Open	Close	Open	Close	Open	Close
Monday	6:00 AM	10:00 AM	1:00 PM	4:00 PM	7:00 PM	11:00PM
Tuesday	6:00 AM	10:00 AM	1:00 PM	4:00 PM	7:00 PM	11:00PM
Wednesday	6:00 AM	10:00 AM	1:00 PM	4:00 PM	7:00 PM	11:00PM
Thursday	6:00 AM	10:00 AM	1:00 PM	4:00 PM	7:00 PM	11:00PM
Friday	6:00 AM	10:00 AM	1:00 PM	4:00 PM	7:00 PM	11:00PM
Saturday	10:00 AM	2:00 PM	6:00 PM	9:00 PM		
Sunday	11:00 AM	2:00 PM				

Appendix C – Program Types and Associated Modalities

Program Type	Modality
Access To Recovery (ATR)	Recovery Support Services
Assessment Services	Assessment
Mental Health Treatment	Community MH Outpatient
	EBP: Family Functional Therapy
	EBP: Illness Self Management
	EBP: Multi-Systemic Therapy
	EBP: Supported Employment
	EBP: Supported Housing
	EBP: Therapeutic Foster Care
	Mental Health Inpatient Treatment
	Mental Health Outpatient Treatment
	Mental Health Recovery Support Services
	Residential Treatment
Substance Abuse Treatment	Detoxification, 24-Hour Service, Hospital Inpatient
	Not Applicable
	Rehabilitation/Residential-Hospital (other than detoxification)
	Rehabilitation/Residential-Short Term (30 days or fewer)
	6162-Rehabilitation/Residential-Long Term (more than 30 days)
	6373-Detoxification, 24 Hour Service, Free-Standing Residential
	6465-Ambulatory- Non-Intensive Outpatient
	68-DUII Education
	69-Outpatient Methadone Maintenance
	78-DUII Outpatient
	8485-Ambulatory-Intensive-Outpatient
	99-Ambulatory-Detoxification

Appendix D – Staff Profile and Non-Staff Physician Taxonomy Table

Category	Sub-Category	Specialty
Agencies	Not Specified	Case Management
		Day Training, Developmentally Disabled Services
		Home Health
		Home Infusion
		Hospice Care, Community Based
		Nursing Care
		Public Health or Welfare
		Voluntary or Charitable
Allopathic & Osteopathic Physicians	Allergy & Immunology	Allergy
		Clinical & Laboratory Immunology
	Anesthesiology	Addiction Medicine
		Critical Care Medicine
		Pain Medicine
	Dermatology	Clinical & Laboratory Dermatological Immunology
		Dermatological Surgery
		Dermatopathology
		MOHS-Micrographic Surgery
		Pediatric Dermatology
	Emergency Medicine	Emergency Medical Services
		Medical Toxicology
		Pediatric Emergency Medicine
		Sports Medicine
		Undersea and Hyperbaric Medicine
	Family Practice	Addiction Medicine
		Adolescent Medicine
		Adult Medicine
		Geriatric Medicine
		Sports Medicine
	Internal Medicine	Addiction Medicine
		Adolescent Medicine
		Allergy & Immunology
		Cardiovascular Disease
		Clinical & Laboratory Immunology
		Clinical Cardiac Electrophysiology
		Critical Care Medicine
		Endocrinology, Diabetes & Metabolism
		Gastroenterology
		Geriatric Medicine
		Hematology
		Hematology & Oncology
		Hepatology
		Infectious Disease
		Interventional Cardiology
		Magnetic Resonance Imaging (MRI)
		Medical Oncology
		Nephrology
		Pulmonary Disease
		Rheumatology
		Sports Medicine

Category	Sub-Category	Specialty
Allopathic & Osteopathic Physicians (continued)	Medical Genetics	Clinical Biochemical Genetics
		Clinical Cytogenetic
		Clinical Genetics (M.D.)
		Clinical Molecular Genetics
		Molecular Genetic Pathology
		Ph.D. Medical Genetics
	Not Specified	Allergy & Immunology
		Anesthesiology
		Clinical Pharmacology
		Colon & Rectal Surgery
		Dermatology
		Emergency Medicine
		Family Practice
		General Practice
		Hospitalist
		Internal Medicine
		Legal Medicine
		Neurological Surgery
		Neuromusculoskeletal Medicine & OMM
		Neuromusculoskeletal Medicine, Sports Medicine
		Nuclear Medicine
		Obstetrics & Gynecology
		Ophthalmology
		Oral & Maxillofacial Surgery
		Orthopaedic Surgery
		Otolaryngology
		Pediatrics
		Physical Medicine & Rehabilitation
		Plastic Surgery
		Surgery
		Thoracic Surgery (Cardiothoracic Vascular Surgery)
		Transplant Surgery
		Urology
	Nuclear Medicine	In Vivo & In Vitro Nuclear Medicine
		Nuclear Cardiology
		Nuclear Imaging & Therapy
	Obstetrics & Gynecology	Critical Care Medicine
		Gynecologic Oncology
		Gynecology
		Maternal & Fetal Medicine
		Obstetrics
		Reproductive Endocrinology
	Orthopaedic Surgery	Adult Reconstructive Orthopaedic Surgery
		Foot and Ankle Orthopaedics
		Hand Surgery
		Orthopaedic Surgery of the Spine
		Orthopaedic Trauma
		Sports Medicine
	Otolaryngology	Facial Plastic Surgery
		Otolaryngic Allergy
		Otolaryngology/Facial Plastic Surgery

Category	Sub-Category	Specialty
Allopathic & Osteopathic Physicians (continued)	Otolaryngology (continued)	Otology & Neurotology
		Pediatric Otolaryngology
		Plastic Surgery within the Head & Neck
	Pain Medicine	Interventional Pain Medicine
		Pain Management
	Pathology	Anatomic Pathology
		Anatomic Pathology & Clinical Pathology
		Blood Banking & Transfusion Medicine
		Chemical Pathology
		Clinical Pathology/Laboratory Medicine
		Cytopathology
		Dermatopathology
		Forensic Pathology
		Hematology
		Immunopathology
		Medical Microbiology
		Molecular Genetic Pathology
		Neuropathology
		Pediatric Pathology
	Pediatrics	Adolescent Medicine
		Clinical & Laboratory Immunology
		Developmental – Behavioral Pediatrics
		Medical Toxicology
		Neonatal-Perinatal Medicine
		Neurodevelopmental Disabilities
		Pediatric Allergy & Immunology
		Pediatric Cardiology
		Pediatric Critical Care Medicine
		Pediatric Emergency Medicine
		Pediatric Endocrinology
		Pediatric Gastroenterology
		Pediatric Hematology-Oncology
		Pediatric Infectious Diseases
		Pediatric Nephrology
		Pediatric Pulmonology
		Pediatric Rheumatology
		Sports Medicine
	Physical Medicine & Rehabilitation	Pain Medicine
		Pediatric Rehabilitation Medicine
		Spinal Cord Injury Medicine
		Sports Medicine
	Plastic Surgery	Plastic Surgery within the Head and Neck
		Surgery of the Hand
	Preventive Medicine	Aerospace Medicine
		Medical Toxicology
		Occupational Medicine
		Preventive Medicine/Occupational Environmental Medicine
		Public Health & General Preventive Medicine
		Sports Medicine
		Undersea & Hyperbaric Medicine

Category	Sub-Category	Specialty
Allopathic & Osteopathic Physicians (continued)	Psychiatry & Neurology	Addiction Medicine
		Addiction Psychiatry
		Child & Adolescent Psychiatry
		Clinical Neurophysiology
		Forensic Psychiatry
		Geriatric Psychiatry
		Neurodevelopmental Disabilities
		Neurology
		Neurology with Special Qualifications in Child Neurology
		Pain Medicine
		Psychiatry
		Sports Medicine
		Vascular Neurology
	Radiology	Body Imaging
		Diagnostic Radiology
		Diagnostic Ultrasound
		Neuroradiology
		Nuclear Radiology
		Pediatric Radiology
		Radiation Oncology
		Radiological Physics
		Therapeutic Radiology
		Vascular & Interventional Radiology
	Surgery	Pediatric Surgery
		Plastic and Reconstructive Surgery
		Surgery of the Hand
		Surgical Critical Care
		Surgical Oncology
		Trauma Surgery
		Vascular Surgery
Ambulatory Health Care Facilities	Clinic/Center	Adolescent and Children Mental Health
		Adult Day Care
		Adult Mental Health
		Ambulatory Family Planning Facility
		Ambulatory Fertility Facility
		Ambulatory Surgical
		Amputee
		Augmentative Communication
		Birthing
		Community Health
		Corporate Health
		Critical Access Hospital
		Dental
		Developmental Disabilities
		Emergency Care
		Endoscopy
		End-Stage Renal Disease (ESRD) Treatment
		Family Planning, Non-Surgical
		Federally Qualified Health Center (FQHC)
		Genetics

Category	Sub-Category	Specialty
Ambulatory Health Care Facilities (continued)	Clinic/Center (continued)	Health
		Hearing and Speech
		Infusion Therapy
		Lithotripsy
		Magnetic Resonance Imaging (MRI)
		Medical Specialty
		Medically Fragile Infants and Children Day Care
		Mental Health (Including Community Mental Health Center)
		Methadone Clinic
		Migrant Health
		Military
		Military Expanded Services
		Military Operational Component
		Multi-Specialty
		Occupational Medicine
		Oncology
		Oncology, Radiation
		Ophthalmologic Surgery
		Oral and Maxillofacial Surgery
		Pain
		Physical Therapy
		Podiatric
		Primary Care
		Prison Health
		Public Health, Federal
		Public Health, State or Local
		Radiology
		Radiology, Mammography
		Radiology, Mobile
		Radiology, Mobile Mammography
		Recovery Care
		Rehabilitation
		Rehabilitation, Cardiac Facilities
		Rehabilitation, Comprehensive Outpatient Rehabilitation Facility (CORF)
		Rehabilitation, Substance Use Disorder
		Research
		Rural Health
		Sleep Disorder Diagnostic
		Student Health
		Urgent Care
		VA
	Not Specified	Clinic/Center
Behavioral Health & Social Service Providers	Counselor	Addiction (Substance Use Disorder)
		Mental Health
		Pastoral
		Professional
		School
	Neuropsychologist	Clinical
	Not Specified	Marriage & Family Therapist
		Neuropsychologist

Category	Sub-Category	Specialty
Behavioral Health & Social Service Providers (continued)	Not Specified (continued)	Psychologist
		Social Worker
	Psychologist	Addiction (Substance Use Disorder)
		Adult Development & Aging
		Behavioral
		Child, Youth & Family
		Clinical
		Counseling
		Educational
		Exercise & Sports
		Family
		Forensic
		Health
		Men & Masculinity
		Mental Retardation & Developmental Disabilities
		Psychoanalysis
		Psychotherapy
		Psychotherapy, Group
		Rehabilitation
		School
		Women
	Social Worker	Clinical
		School
Chiropractic Providers	Chiropractor	Internist
		Neurology
		Nutrition
		Occupational Medicine
		Orthopedic
		Radiology
		Sports Physician
		Thermography
	Not Specified	Chiropractor
Dental Providers	Dentist	Dental Public Health
		Endodontics
		General Practice
		Oral and Maxillofacial Pathology
		Oral and Maxillofacial Radiology
		Oral and Maxillofacial Surgery
		Orthodontics and Dentofacial Orthopedics
		Pediatric Dentistry
		Periodontics
		Prosthodontics
	Not Specified	Dental Assistant
		Dental Hygienist
		Dental Laboratory Technician
		Dentist
		Denturist
Dietary & Nutritional Service Providers	Dietitian, Registered	Nutrition, Metabolic
		Nutrition, Pediatric
		Nutrition, Renal
	Not Specified	Dietary Manager

Category	Sub-Category	Specialty
Dietary & Nutritional Service Providers (continued)	Not Specified (continued)	Dietetic Technician, Registered
		Dietitian, Registered
		Nutritionist
	Nutritionist	Nutrition, Education
Emergency Medical Service Providers	Not Specified	Emergency Medical Technician, Basic
		Emergency Medical Technician, Intermediate
		Emergency Medical Technician, Paramedic
		Personal Emergency Response Attendant
Eye and Vision Services Providers	Not Specified	Optometrist
		Technician/Technologist
	Optometrist	Corneal and Contract Management
		Low Vision Rehabilitation
		Occupational Vision
		Pediatrics
		Sports Vision
		Vision Therapy
	Technician/Technologist	Contact Lens
		Contact Lens Fitter
		Ocularist
		Ophthalmic
		Ophthalmic Assistant
		Optician
		Optometric Assistant
		Optometric Technician
		Orthoptist
Hospital Units	Not Specified	Medicare Defined Swing Bed Unit
		Psychiatric Unit
		Rehabilitation Unit
		Rehabilitation, Substance Use Disorder Unit
Hospitals	Chronic Disease Hospital	Children
	General Acute Care Hospital	Children
		Critical Access
		Rural
		Women
	Military Hospital	Community Health
		Medical Center
		Operational Component Facility
	Not Specific	Christian Science Sanitorium
		Chronic Disease Hospital
		General Acute Care Hospital
		Military Hospital
		Psychiatric Hospital
		Rehabilitation Hospital
		Special Hospital
	Rehabilitation Hospital	Children
Laboratories	Not Specified	Clinical Medical Laboratory
		Dental Laboratory
		Physiological Laboratory
Managed Care Organizations	Not Specified	Exclusive Provider Organization
		Health Maintenance Organization
		Point of Service

Category	Sub-Category	Specialty
Managed Care Organizations (continued)	Not Specified (continued)	Preferred Provider Organization
Not Specified	Not Specified	Multi-Specialty
		Single Specialty
Nursing & Custodial Care Facilities	Assisted Living Facility	Assisted Living, Behavioral Disturbances
		Assisted Living, Mental Illness
	Custodial Care Facility	Adult Care Home
	Not Specified	Alzheimer Center (Dementia Center)
		Assisted Living Facility
		Christian Science Facility
		Custodial Care Facility
		Hospice, Inpatient
		Intermediate Care Facility, Mental Illness
		Intermediate Care Facility, Mentally Retarded
		Nursing Facility/Intermediate Care Facility
		Skilled Nursing Faciility
	Skilled Nursing Facility	Nursing Care, Pediatric
Nursing Service Providers	Not Specified	Licensed Practical Nurse
		Licensed Psychiatric Technician
		Licensed Vocational Nurse
		Registered Nurse
	Registered Nurse	Addiction (Substance Use Disorder)
		Administrator
		Ambulatory Care
		Cardiac Rehabilitation
		Case Management
		College Health
		Community Health
		Continence Care
		Continuing Education/Staff Development
		Critical Care Medicine
		Diabetes Educator
		Dialysis, Peritoneal
		Emergency
		Enterostomal Therapy
		Flight
		Gastroenterology
		General Practice
		Gerontology
		Hemodialysis
		Home Health
		Hospice
		Infection Control
		Infusion Therapy
		Lactation Consultant
		Maternal Newborn
		Medical-Surgical
		Neonatal Intensive Care
		Neonatal, Low-Risk
		Nephrology
		Neuroscience

Category	Sub-Category	Specialty
Nursing Service Providers (continued)	Registered Nurse (continued)	Nurse Massage Therapist (NMT)
		Nutrition Support
		Obstetric, High-Risk
		Obstetric, Inpatient
		Occupational Health
		Oncology
		Ophthalmic
		Orthopedic
		Ostomy Care
		Otorhinolaryngology & Head-Neck
		Pain Management
		Pediatric Oncology
		Pediatrics
		Perinatal
		Plastic Surgery
		Psych/Mental Health
		Psych/Mental Health, Adult
		Psych/Mental Health, Child & Adolescent
		Rehabilitation
		Reproductive Endocrinology/Infertility
		School
		Urology
		Women's Health Care, Ambulatory
		Wound Care
Nursing Service Related Providers	Not Specified	Adult Companion
		Chore Provider
		Christian Science Practitioner/Nurse
		Day Training/Habilitation Specialist
		Home Health Aide
		Homemaker
		Nurse's Aide
		Nursing Home Administrator
		Technician
	Technician	Attendant Care Provider
		Personal Care Attendant
Other Service Providers	Contractor	Home Modifications
		Vehicle Modifications
	Not Specified	Acupuncturist
		Contractor
		Driver
		Funeral Director
		Homeopath
		Legal Medicine
		Lodging
		Medical Genetics, Ph.D. Medical Genetics
		Midwife, Certified
		Midwife, Lay
		Naturopath
		Specialist
		Veterinarian
	Specialist	Graphics Designer

Category	Sub-Category	Specialty
Other Service Providers (continued)	Specialist (continued)	Prosthetics Case Management
		Research Data Abstracter/Coder
		Research Coder
	Veterinarian	Medical Research
Pharmacy Service Providers	Not Specified	Pharmacist
		Pharmacy Technician
	Pharmacist	General Practice
		Nuclear Pharmacy
		Nutrition Support
		Pharmacotherapy
		Psychopharmacy
Physician Assistants & Advanced Practice Nursing Providers	Clinical Nurse Specialist	Acute Care
		Adult Health
		Chronic Care
		Community Health/Public Health
		Critical Care Medicine
		Emergency
		Ethics
		Family Health
		Gerontology
		Holistic
		Home Health
		Informatics
		Long-Term Care
		Medical-Surgical
		Neonatal
		Neuroscience
		Occupational Health
		Oncology
		Oncology, Pediatrics
		Pediatrics
		Perinatal
		Perioperative
		Psych/Mental Health
		Psych/Mental Health, Adult
		Psych/Mental Health, Child & Adolescent
		Psych/Mental Health, Child & Family
		Psych/Mental Health, Chronically Ill
		Psych/Mental Health, Community
		Psych/Mental Health, Geropsychiatric
		Rehabilitation
		School
		Transplantation
		Women's Health
	Not Specified	Anesthesiologist Assistant
		Clinical Nurse Specialist
		Midwife, Certified Nurse
		Nurse Anesthetist, Certified Registered
		Nurse Practitioner
		Physician Assistant
	Nurse Practitioner	Acute Care

Category	Sub-Category	Specialty
Physician Assistants & Advanced Practice Nursing Providers (continued)	Nurse Practitioner (continued)	Adult Health
		Community Health
		Critical Care Medicine
		Family
		Gerontology
		Neonatal
		Neonatal, Critical Care
		Obstetrics & Gynecology
		Occupational Health
		Pediatrics
		Pediatrics, Critical Care
		Perinatal
		Primary Care
		Psych/Mental Health
		School
		Women's Health
	Physician Assistant	Medical
		Surgical
Podiatric Medicine & Surgery Service Providers	Not Specified	Assistant, Podiatric
		Podiatrist
	Podiatrist	Foot & Ankle Surgery
		Foot Surgery
		General Practice
		Primary Podiatric Medicine
		Public Medicine
		Radiology
		Sports Medicine
Residential Treatment Facilities	Not Specified	Community Based Residential Treatment Facility, Mental Illness
		Community Based Residential Treatment, Mental Retardation and/or Developmental Disabilities
		Psychiatric Residential Treatment Facility
		Residential Treatment Facility, Emotionally Disturbed Children
		Residential Treatment Facility, Mental Retardation and/or Developmental Disabilities
		Residential Treatment Facility, Physical Disabilities
		Substance Abuse Rehabilitation Facility
	Substance Abuse Rehabilitation Facility	Substance Abuse Treatment, Children
Respiratory, Rehabilitative & Restorative Service Providers	Not Specified	Art Therapist
		Dance Therapist
		Kinesiotherapist
		Massage Therapist
		Music Therapist
		Occupational Therapist
		Occupational Therapy Assistant
		Orthotics/Prosthetics Fitter
		Orthotist
		Physical Therapist
		Physical Therapy Assistant
		Prosthetist

Category	Sub-Category	Specialty
Respiratory, Rehabilitative & Restorative Service Providers (continued)	Not Specified (continued)	Pulmonary Function Technologist
		Recreation Therapist
		Rehabilitation Counselor
		Rehabilitation Practitioner
		Respiratory Therapist, Certified
		Respiratory Therapist, Registered
		Specialist/Technologist
	Occupational Therapist	Ergonomics
		Hand
		Human Factors
		Neurorehabilitation
		Pediatrics
		Rehabilitation, Driver
	Physical Therapist	Cardiopulmonary
		Electrophysiology, Clinical
		Ergonomics
		Geriatrics
		Hand
		Human Factors
		Neurology
		Orthopedic
		Pediatrics
		Sports
	Rehabilitation Counselor	Assistive Technology Practitioner
		Assistive Technology Supplier
	Respiratory Therapist, Certified	Critical Care
		Educational
		Emergency Care
		General Care
		Geriatric Care
		Home Health
		Neonatal/Pediatrics
		Palliative/Hospice
		Patient Transport
		Pulmonary Diagnostics
		Pulmonary Function Technologist
		Pulmonary Rehabilitation
		SNF/Subacute Care
	Respiratory Therapist, Registered	Critical Care
		Educational
		Emergency Care
		General Care
		Geriatric Care
		Home Health
		Neonatal/Pediatrics
		Palliative/Hospice
		Patient Transport
		Pulmonary Diagnostics
		Pulmonary Function Technologist
		Pulmonary Rehabilitation
		SNF/Subacute Care

Category	Sub-Category	Specialty
Respiratory, Rehabilitative & Restorative Service Providers (continued)	Specialist/Technologist	Athletic Trainer
		Rehabilitation, Blind
Respite Care Facility	Not Specified	Respite Care
	Respite Care	Respite Care Camp
		Respite Care, Mental Illness, Child
		Respite Care, Mental Retardation and/or Developmental Disabilities, Child
		Respite Care, Physical Disabilities, Child
Speech, Language and Hearing Service Providers	Audiologist	Assistive Technology Practitioner
		Assistive Technology Supplier
	Not Specified	Audiologist
		Audiologist-Hearing Aid Fitter
		Hearing Instrument Specialist
		Specialist/Technologist
		Speech-Language Pathologist
	Specialist/Technologist	Audiology Assistant
		Speech-Language Assistant
Suppliers	Durable Medical Equipment & Medical Supplies	Customized Equipment
		Dialysis Equipment & Supplies
		Nursing Facility Supplies
		Oxygen Equipment & Supplies
		Parenteral & Enteral Nutrition
	Not Specified	Blood Bank
		Durable Medical Equipment & Medical Supplies
		Eye Bank
		Eyewear Supplier (Equipment, not the service)
		Hearing Aid Equipment
		Home Delivered Meals
		Organ Procurement Organization
		Pharmacy
		Portable X-Ray Supplier
		Prosthetic/Orthotic Supplier
Technologists, Technicians & Other Technical Service Providers	Not Specified	Radiologist Technologist
		Spec/Tech, Cardiovascular
		Spec/Tech, Health Info
		Spec/Tech, Pathology
		Specialist/Technologist, Other
		Technician, Cardiology
		Technician, Health Information
		Technician, Other
		Technician, Pathology
	Radiologic Technologist	Bone Densitometry
		Cardiac-Interventional Technology
		Cardiovascular-Interventional Technology
		Computed Tomography
		Magnetic Resonance Imaging
		Mammography
		Nuclear Medicine Technology
		Quality Management
		Radiation Therapy

Category	Sub-Category	Specialty
Technologists, Technicians & Other Technical Service Providers (continued)	Radiologic Technologist (continued)	Radiography
		Sonography
		Vasculary Sonography
		Vascular-Interventional Technology
	Spec/Tech, Cardiovascular	Cardiovascular Invasive Specialist
		Sonography
		Vascular Specialist
	Spec/Tech, Health Info	Coding Specialist, Hospital Based
		Coding Specialist, Physician Office Based
		Registered Record Administrator
	Spec/Tech, Pathology	Blood Banking
		Chemistry
		Cytotechnology
		Hemapheresis Practitioner
		Hematology
		Histology
		Immunology
		Laboratory Management
		Laboratory Management, Diplomate
		Medical Technologist
		Microbiology
	Specialist/Technologist, Other	Art, Medical
		Biochemist
		Biomedical Engineering
		Biomedical Photographer
		Biostatistician
		EEG
		Electroneurodiagnostic
		Geneticist, Medical (PhD)
		Graphics Methods
		Illustration, Medical
		Nephrology
		Surgical
	Technician, Health Information	Assistant Record Technician
	Technician, Other	Biomedical Engineering
		Darkroom
		EEG
		Renal Dialysis
		Veterinary
	Technician, Pathology	Histology
		Medical Laboratory
		Phlebotomy
Transportation Services	Ambulance	Air
		Land
		Sea
	Not Specified	Ambulance
		Bus
		Non-emergency Medical Transport (VAN)
		Private Vehicle
		Secured Medical Transport (VAN)
		Taxi

Category	Sub-Category	Specialty
Transportation Services (continued)	Not Specified (continued)	Train
		Transportation Broker

Appendix E – Alert Types, Categories, Trigger Points, and Descriptions

Alert Type	Alert Category	Trigger Point	Alert Description (as it appears in OWITS)
Annual MH Assessment	Client	Last Assessment Date	Indicates the active clients where an annual assessment is due.
ASAM Update	Client	Last ASAM Assessment date or Enrollment start date	Reminder to update the client's ASAM screen based on the client's current program ASAM level of care.
Client Group Enrollment Expiring	Client	Client Group Enrollment End Date	Indicates the clients whose client group enrollments are about to expire.
Client Intake Creation	Client	Client Intake Create Date	Informational, for the creation of a client intake. Use the configuration set up to define the desired staff action. Example: "A client appointment should be scheduled within 5 days of intake. Please schedule an appointment if you have not already done so.
Client Profile Creation	Client	Client Profile Create Date	Alert for notifying if a client profile is created for a client.
Client Turning Age (x)	Client	Client Date of Birth	Indicates the clients who are turning a certain age. "When is the next activity due" should be answered with the target age, in days. A target age of 18 would be entered as 6570 (18 multiplied by 365). Please note that WITS will add leap year days as appropriate.
Close Discharged Case	Client	Discharge Created Date	Alert for notifying if a discharge has been created more than 30 days ago and the case is still open.
Consent Creation	Client	Consent Create Date	Informational, for the creation of a client consent. Use the configuration set up to define the desired staff action. Example: "The consent should be signed by the client within 10 days of creating the consent. Please secure the client's signature if you have not already done so."

Alert Type	Alert Category	Trigger Point	Alert Description (as it appears in OWITS)
Consent Expiration	Client	Consent Expiration Date	Informational, for the expiration of a client consent. Use the configuration set up to define the desired staff action. Example: "The consent has expired for the client. Please check if client is still in treatment at the provider and may require another consent.
Eligibility Determination Due	Client	Created date of Client Eligibility Record	Indicates the active clients where an eligibility record has been created but no final determination date has been entered.
Encounter Creation	Client	Encounter Create Date	Alert for notifying if an encounter is created for a client.
Encounter Released to Billing	Client	Encounter Release to Billing Date	Alert for notifying if an encounter is released to billing.
Expired Collateral Consent	Client	Collateral Contact Consent Expiration Date	Indicates the active clients where an update to a collateral contact's consent is due.
GPRA Followup Due	Client	GPRA Intake interview date	Indicates the ATR clients where a six-month followup GPRA interview is due.
Inactive Client	Client	Last Encounter Date or Miscellaneous Note Date	Indicates the active clients where there has not been an encounter or miscellaneous note for some period of time.
Initial MH Assessment	Client	Intake Date	Indicates the active clients where an assessment has not been performed.
Initial Treatment Plan	Client	Admission Date	Indicates the active clients where an admission has taken place but no treatment plan has been created.
Periodic Fee Determination Due	Client	Last Fee Determination Effective Date	Indicates the active clients where a periodic fee determination is due.
Reauthorization Due	Client	End date on authorization	Indicates the active clients where an active or pending authorization exists and where the authorization will expire soon.
Referral Creation	Agency	Referral Create Date	Alert for notifying if a referral is created for a client.
Referrals In	Agency	Max Referred Date	Informational for referrals in. Use the configuration set up to define the desired staff action. Example: "The referrals are received for a client. Please review and accept referrals."

Alert Type	Alert Category	Trigger Point	Alert Description (as it appears in OWITS)
Staff Recertification Due	Agency	Certification Expiration Date	Notifies agency administrator if staff certification is due.
Treatment Plan Review	Client	Treatment Plan Review Date	Indicates the active clients where a treatment plan has been created and signed of and a treatment plan review is due.
Treatment Plan Review Approval Required	Client	Creation of Treatment Plan Review	Indicates the treatment plan review records where at least one staff person has not signed off.
Voucher Creation	Client	Referral Voucher Create Date	Alert for notifying when a referral voucher is created for a client.

Appendix F – 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

Appendix G – 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.

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	October 12, 2012	Some date fields no longer automatically populate with the current date.
Justin D. King	December 24, 2012	Added instructions for creating an ITRS Concurrent program, added an appendix, updated formatting, noted the Modality Specifier field, noted requirements for staff DOB, removed “Client Outcomes Due” alert, added “Client Turning Age (x)” alert, expanded Taxonomy table.
Justin D. King	January 23, 2013	“Receive Emergency Access Email” field details added.
Justin D. King	February 22, 2013	Added further details for the Staff Assignment screen.
Justin D. King	December 17, 2013	Added description and instructions for the new Agency Events module. Explained the new “Domains” field in Announcements. Detailed the “Deleted Clients” module in the Agency List. Added link to Navigation Map.