OWITS Reference Manual

Volume 4

Client Profile

Revision 1-6

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Description

In order to record any activity for an individual client in OWITS, the “Client Profile” record must first be created. This includes various elements of identification and demographic data. This manual describes the processes involved in creating and modifying this record.

Purpose

To provide instructions for creating, reviewing, and modifying client profile records and the additional OWITS modules associated therewith.

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.
- 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*.
- Button: An image or icon on a computer screen that executes a command when clicked, such as "the OK button" or "the Cancel button."
- Character: A single unit of information, including letters, numerical digits, punctuation marks, spaces, and symbols.
- Click: To press a button on a computer mouse. "Click" refers to pressing the left mouse button once. "Double-click" refers to pressing the left mouse button twice in rapid succession. "Right-click" refers to pressing the right mouse button once.
- Client: An individual who is receiving, has received, or will receive treatment or services.
- CPMS: Client Process Monitoring System – the forms and database used by AMH to track treatment and services delivered to individuals throughout the state of Oregon.
- 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.
- EHR: Electronic Health Record – computer software designed to track data regarding the demographics and treatment of patients.
- Environment: A subdivision of the overall OWITS system containing all available aspects of the program but 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*.
- 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.
- Heading / Subheading: The title of an OWITS module or of divisions and screens within OWITS modules. See also *Module*.
- ID: Identification

- 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.
- Locator: A small section of white text in the top section of the OWITS screens that displays the current user, the current or "context" agency, the current or "context" facility, and the currently-selected client record (see OWITS Reference Manual, Volume 1: OWITS Basics).
- Module: A smaller component of a larger system.
- Navigate / Navigation: Movement through a series of data entry screens.
- Navigation Pane / Navigation View: The OWITS menu system, located on the left side of each OWITS page.
- Option Transfer Box: A pair of boxes on a web page that allow options to be selected and moved from one box to another. Also known as a "Mover Box."
- OWITS: Oregon Web-Infrastructure for Treatment Services – an electronic behavioral health record program as modified for Oregon.
- Populate: To fill a data entry field with data.
- Pop-up: A new browser window that opens to display additional information without disrupting the page currently open.
- Screen: A specific informational view that can be displayed in OWITS at one time.
- SSN: Social Security Number
- 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.
- Tier: A layer or ranking within a hierarchy.
- User: A person who interacts with the OWITS system.
- 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 Purpose of a Client Profile

1.1 The Client Profile is the beginning of an OWITS record for any individual who may receive, does receive, or has received treatment or services from a provider agency.

1.2 Parts of the Client Profile are similar to parts of the CPMS forms previously used by providers to report client treatment or service data to AMH.

1.2.1 Most of the Client Profile is similar to the client's demographic information, generally found in the first three or four lines of the CPMS forms (see Appendix A – Example of CPMS Mental Health Enrollment Form and Appendix B – Example of CPMS Alcohol & Drug Enrollment Form).

1.2.2 Some providers know this step as the "Intake."

1.3 Without a Client Profile, the client cannot be identified as a client within OWITS.

1.3.1 The Client Profile is required.

1.3.2 Several of the data entry fields within the Client Profile record are used to meet federal reporting requirements.

1.4 The Client Profile contains:

1.4.1 Demographic data, such as name, date of birth, gender, and Social Security number.

1.4.2 Contact information, such as addresses and phone numbers.

1.4.3 Collateral contact information, such as names and addresses of family members, law enforcement personnel, or medical professionals.

1.4.4 Other identifying information such as ID numbers and case numbers.

1.4.5 Payor plan enrollment data, such Oregon Health Plan.

1.4.6 Payment vouchers for ATR clients.

1.4.7 Employment history.

1.4.8 Allergy records.

1.4.9 Other health records and documents.

1.5 The Client Profile must be created early in the contact and treatment process.

1.5.1 Other client treatment tools and modules in OWITS will not be available until a Client Profile is created.

1.5.1.1 It is possible to complete only the required portions of the Client Profile to access other tools and modules.

1.5.1.2 The non-required portions should be completed as soon as possible prior to discharging the client.

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

2.0 Importance of Data Entry Accuracy

2.1 Accurate data entry is vital to the proper functioning of the OWITS EHR.

2.2 Some of the fields in the Client Profile are responsible for creating the unique Client ID number (see **Error! Reference source not found.**).

2.3 Inaccurate entry in these fields may cause multiple records to be created for one client.

2.4 Merging and deleting records are tasks that may involve complicated and time-consuming processes and should be avoided whenever possible.

2.4.1 If client records must be merged or deleted, submit a request through the OWITS Support Ticket module or by email to owits.support@state.or.us.

2.5 Enter as much data as possible on every screen.

3.0 Initial Steps

3.1 The instructions for the data entry described in this manual assume that the user has already completed the following series of initial steps required to create a client's record in OWITS.

3.2 Log in to the appropriate OWITS environment.

3.2.1 Use Training for practice, demonstration, or test purposes.

3.2.2 Use Production to record actual client records.

3.3 If records in multiple agencies are available, select the agency in which the client record exists or will be created.

3.3.1 This selects the current or "context" agency.

3.3.2 The current agency is displayed in the Locator at the top of the screen.

3.4 If records in multiple facilities are available, select the facility in which the client record exists or will be created.

3.4.1 This selects the current or "context" facility.

3.4.2 The current facility is displayed in the Locator at the top of the screen.

3.5 For specific instructions on selecting an agency and facility at log-in, see OWITS Reference Manual, Volume 1: OWITS Basics.

4.0 Client Search and the Client List

4.1 In the Navigation View, click Client List.

4.2 The Client Search screen will display.

4.3 The Client Search section is a series of search criteria fields that can be used to locate a client record.

4.3.1 Searches may be performed using any combination of criteria in the search fields on this screen.

4.3.2 Users may complete any or all of the fields as needed to perform the necessary search(es).

4.3.3 Users may enter wildcards into some fields to perform searches with unknown elements.

4.3.3.1 For a detailed description of the possible wildcards and their functions within OWITS, see OWITS Reference Manual, Volume 1: OWITS Basics.

4.3.4 To perform a search, enter data into any or all of the available fields:

4.3.4.1 *Agency*

4.3.4.1.1 This read-only field will automatically populate with the name of the current (or "context") agency (3.3).

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

4.3.4.1.3 Users with access to client records in more than one agency can change their context agency by navigating to My Settings > Change Facility and following the prompts.

4.3.4.2 *Facility*

4.3.4.2.1 This field will automatically populate with the name of the current (or "context") facility.

4.3.4.2.2 If this field is not changed, the search will return only clients with Intake records in the selected facility.

4.3.4.2.3 To search for client records in other facilities, select a different facility or set this field to the null value (blank).

4.3.4.2.4 To search for records for clients with only a client profile created, set this field to the null value (blank).

4.3.4.2.5 Users with access to client records in more than one facility can change their context facility by navigating to My Settings > Change Facility and following the prompts.

4.3.4.3 *First Name*

4.3.4.3.1 If desired, enter all or part of the client's first name.

4.3.4.3.2 Wildcards can be used in this field.

4.3.4.3.3 If the client has an alternate first name (see 5.8.3.1), searching for it in this field will include the client's profile first name (see 5.7.1.1) in the search results.

4.3.4.4 *Last Name*

4.3.4.4.1 If desired, enter all or part of the client's last name.

4.3.4.4.2 Wildcards can be used in this field.

4.3.4.4.3 If the client has an alternate last name (see 5.8.3.3), searching for it in this field will include the client's profile last name (see 5.7.1.3) in the search results.

4.3.4.5 *SSN*

4.3.4.5.1 If desired, enter all or part of the client's Social Security number.

4.3.4.5.2 Wildcards can be used in this field.

4.3.4.5.3 Hyphens are optional.

4.3.4.6 *DOB*

4.3.4.6.1 If desired, enter the client's date of birth.

4.3.4.6.2 This field does not accept wildcards or incomplete entries.

4.3.4.6.3 The date format must be MM/DD/YYYY or MM/DD/YY.

4.3.4.7 *Client ID*

4.3.4.7.1 This search field refers to a reference code used by the OWITS database developers and administrators.

4.3.4.7.2 Searching by this field is not likely to produce desired results.

4.3.4.8 *Unique Client Number*

4.3.4.8.1 If desired, enter all or part of the identification number generated by OWITS for the client's record (see 5.7.1.11.1).

4.3.4.8.2 The OWITS client identification number follows this format: A123456BC123456

4.3.4.8.3 Wildcards can be used in this field.

4.3.4.9 *Provider Client ID*

4.3.4.9.1 If desired, enter all or part of the identification number assigned to the client records outside of OWITS (see 5.7.1.10.1).

4.3.4.9.2 Wildcards can be used in this field.

4.3.4.10 *Treatment Staff*

4.3.4.10.1 If desired, select the name of a staff member assigned to the client's treatment team (for an explanation of the treatment team, see OWITS Reference Manual, Volume 5: Client Activity and Contact)

4.3.4.11 *Primary Care Staff*

4.3.4.11.1 If desired, indicate whether the staff member selected in the Treatment Staff field (4.3.4.10) is assigned as the Primary Care Staff in the client's treatment team (for an explanation of the treatment team and the "Primary Care Staff" designation, see OWITS Reference Manual, Volume 5: Client Activity and Contact).

4.3.4.11.2 This field will only be available if a staff member name has been selected in the Treatment Staff field.

4.3.4.11.3 Selecting "No" will return only treatment team members who are not designated as the client's Primary Care Staff.

4.3.4.11.4 Selecting "Yes" will return only treatment team members who have been designated as the client's Primary Care Staff.

4.3.4.11.5 Selecting the null value (blank) will cause the search function to ignore the Primary Care Staff designation.

4.3.4.12 *Case Status*

4.3.4.12.1 If desired, indicate whether the search results should return client records with open or closed cases (this refers to the "Closed Date" field on the Intake record and the date ranges on the Episode List; see OWITS Reference Manual, Volume 5: Client Activity and Contact).

4.3.4.12.2 Selecting "All Clients" will cause the search function to ignore the client's episode list.

4.3.4.12.3 Selecting "Clients with Closed Cases" will return clients that have any Intake record in the selected facility (4.3.4.2) that has a closed date, including clients who also have other Intake records that do not have a closed date.

4.3.4.12.4 Selecting "Clients with Open Cases" will return clients that have an Intake record in the selected facility that does not have a closed date, including clients who also have other Intake records with a closed date.

4.3.4.12.5 Selecting "Clients with No Case History" will return only clients whose records do not have any Intake records in the context agency (4.3.4.1).

4.3.4.12.5.1 The Facility field (4.3.4.2) should be set to the null value (blank) for this selection to return the desired results.

4.3.4.12.5.2 Client Profile records are saved at the Agency level and will be excluded from the search results if a facility is selected.

4.3.4.13 *Intake Staff*

4.3.4.13.1 If desired, select the name of the staff member who performed or recorded the Intake (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

4.3.4.14 *Other Number*

4.3.4.14.1 If desired, enter all or part of any other identifying numbers that have been applied to the client's profile (see 5.12.1).

4.3.4.14.2 Wildcards can be used in this field.

4.3.4.15 *Number Type*

4.3.4.15.1 If desired, select the option that correlates to the number entered in the Other Number field (4.3.4.14).

4.3.4.15.2 Selecting the null value (blank) will cause the search function to search all of the other numbers in the client profiles for the number entered in the Other Number field.

4.3.4.15.3 Selecting any other option will return only clients whose records contain other numbers that match both the number entered in the Other Number field and the categorical description selected in this field.

4.3.4.15.4 If the Other Number field is blank, selecting any option in this field will return all client records that have other numbers with this categorical description.

4.3.4.16 *Include Only Active Consents*

4.3.4.16.1 An "Active Consent" is a Consent record that has not expired and has not been revoked.

4.3.4.16.1.1 In OWITS, "consent" generally refers to a release of information or disclosure agreement.

4.3.4.16.1.2 For a detailed explanation of the Consent record, how it works, and what makes it active or not, see OWITS Reference Manual, Volume 8: Consent and Referrals.

4.3.4.16.2 Selecting "Yes" will return clients with Consent records that have not expired and that have not been revoked.

4.3.4.16.3 Selecting "No" or leaving the field blank will cause the search function to ignore any Consent records.

4.3.5 Click Go to run the search with the criteria entered above.

4.3.6 Click Clear to set all the search criteria fields to their default values.

4.4 The search results will display in the Client List table.

4.4.1 The names of clients whose records match the criteria entered above and whose profiles are saved within the context agency will appear in this table.

4.4.2 If the desired client does not appear, modify or broaden the search criteria and try again.

4.4.3 If the search results return more than 1,000 records, OWITS will refuse to display them, and the search criteria will need to be narrowed.

4.4.4 If a client's name appears in red text, a Miscellaneous Note on the client record has been marked with an alert notice (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

4.4.5 Links in the Actions column provide access to aspects of the client's record, such as the profile, activity list, and linked consents screen.

4.4.5.1 For details regarding the client profile, see 5.0.

4.4.5.2 For details regarding the activity list, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

4.4.5.3 For details regarding the linked consents screen, see OWITS Reference Manual, Volume 8: Consent and Referrals.

4.4.6 Some users will also see a "Delete Record" command in the Actions column.

4.4.6.1 To delete a client profile record, click the "Delete Record" link.

4.4.6.2 OWITS will confirm the delete command.

4.4.6.3 WARNING: This action cannot be undone.

4.4.6.4 The client's profile cannot be deleted if any other activity has been recorded.

4.5 Some users will also see a "Clients with Consents from Outside Agencies" table at the bottom of the screen.

4.5.1 The names of clients whose records match the criteria entered above and whose profiles are saved in other agencies where "consent" records have been created to share data with the context agency.

4.5.1.1 "Consent" in this case specifically means a disclosure agreement or a release of information agreement, not a consent to treat.

4.5.1.2 For details regarding the consent, disclosure, release of information, and referral process, see OWITS Reference Manual, Volume 8: Consent and Referrals.

4.5.2 If the desired client does not appear, modify or broaden the search criteria and try again.

4.5.3 If the search results return more than 1,000 records, OWITS will refuse to display them, and the search criteria will need to be narrowed.

4.5.4 If a client's name appears in red text, a Miscellaneous Note on the client record has been marked with an alert notice (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

4.5.5 Links in the Actions column provide access to aspects of the client's record, such as the activity list and linked consents screen.

4.5.5.1 For details regarding the activity list, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

4.5.5.2 For details regarding the linked consents screen, see OWITS Reference Manual, Volume 8: Consent and Referrals.

4.5.6 Some users will also see a "Remove" command in the Actions column.

4.5.6.1 To reject the disclosed information regarding a client, click the "Remove" link.

4.5.6.2 WARNING: OWITS will *not* confirm this action, which cannot be undone.

4.5.6.3 The disclosing agency must create a new Consent record to cause this entry to reappear.

4.6 OWITS will continue to display the most recent search results every time the Client List screen is accessed until the user changes the context facility, changes the context agency, or logs out of the system.

5.0 Client Profile

5.1 A client profile is a series of six screens of basic data, most of which is necessary to enter treatment or service data into OWITS, plus six additional screens which provide other useful information or tools.

5.2 To create a client profile, log in to the appropriate OWITS environment (see OWITS Reference Manual, Volume 1: OWITS Basics).

5.3 In the Navigation View, click Client List.

5.4 The Client Search page will appear.

5.5 Verify that the client profile to be created does not already exist.

5.5.1 Perform a search to determine whether a record has already been created for the client.

5.5.1.1 Search terms should be as broad as possible to increase the possibility of locating an existing record.

5.5.1.2 Use wildcards where needed, especially if multiple name spellings are possible.

5.5.1.3 Searches will be limited to the selected agency.

5.5.1.4 IMPORTANT: It may be necessary to set the Facility field to the null value (blank) to locate some client records.

5.5.1.4.1 If a client has only a profile created within the agency, his or her record will only appear if the Facility field is set to the null value (blank).

5.5.1.4.2 If a client has a profile and other activity in a facility other than the current facility (as indicated in the Locator), his or her record will only appear if the Facility field is set to the null value (blank) or the facility in which the client has received treatment or services.

5.5.1.5 Ensure that modifiers (such as Case Status and Active Consents) are set to include the maximum range of clients.

5.5.2 If a profile does not already exist, create a new profile (see 5.6).

5.5.3 If a profile already exists for the client, do not create a new profile.

5.5.3.1 Use the existing client profile for new information.

5.5.3.2 Modify the existing client profile as needed.

5.5.3.3 For details regarding adding treatment or service records in the modules found in the Activity List, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

5.5.3.4 If multiple profiles are found for the same client, the records can be merged.

5.5.3.4.1 Send a request to OWITS system administrators at owits.support@state.or.us.

5.5.3.4.2 Include the system-generated client ID number (see **Error! Reference source not found.**) for both records.

5.5.3.4.3 If one record is incorrect, specify which one so that it can be deleted once any relevant data has been merged into the correct record.

5.5.3.4.4 If both records are correct, indicate which aspects of each are to be kept or discarded.

5.6 On the Client List screen, click the "Add Client" link in the blue Client List heading.

5.6.1 This process will create a client profile within the selected agency.

5.6.2 Facility will not be assigned until future steps, including the Intake record, are completed (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

5.7 The Client Profile series will open.

5.7.1 The first screen in the series is Client Profile, which contains the following fields:

5.7.1.1 *First Name*

5.7.1.1.1 Enter the client's first given name.

5.7.1.1.2 Use the client's legal name whenever possible.

5.7.1.1.3 Avoid using shortened names or nicknames in this field.

5.7.1.1.4 Special characters such as hyphens (-) are allowed in this field.

5.7.1.2 *Middle Name*

5.7.1.2.1 Enter the client's middle name, if applicable.

5.7.1.2.2 Avoid using shortened names or nicknames in this field.

5.7.1.2.3 Special characters such as hyphens (-) are allowed.

5.7.1.3 *Last Name*

5.7.1.3.1 Enter the client's last name (also known as the family name or surname).

5.7.1.3.2 Multiple names are allowed in this field.

5.7.1.3.3 Special characters such as hyphens (-) are allowed.

5.7.1.4 *Last Name at Birth*

5.7.1.4.1 Enter the client's last name at the time of the client's birth.

5.7.1.4.2 If the client is female and is or has been married, this is likely to be her "maiden name."

5.7.1.4.3 If the client's last name has not changed since the time of his or her birth, re-enter the client's current last name.

5.7.1.4.4 If the client's last name at birth is not known, due to circumstances regarding adoption or similar situations, leave this field blank.

5.7.1.5 *Gender*

5.7.1.5.1 Select the client's gender.

5.7.1.5.2 The available options are Male, Female, and Unknown.

5.7.1.5.2.1 Avoid selecting "Unknown" if possible.

5.7.1.5.2.2 This selection determines the first character of the Client ID number (**Error! Reference source not found.**), which cannot be changed after the client profile has been successfully saved.

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

5.7.1.5.4 If a client's gender is not easily determined, users are expected to follow appropriate guidelines established by their agencies' existing policies for selecting a gender.

5.7.1.6 *DOB*

5.7.1.6.1 Enter the client's date of birth.

5.7.1.6.2 Acceptable date formats are MM/DD/YY or MM/DD/YYYY.

5.7.1.7 *SSN*

5.7.1.7.1 Enter the client's Social Security number.

5.7.1.7.2 The acceptable number format is 123-45-6789.

5.7.1.7.3 000-00-0001 if the client refuses to provide his or her Social Security number.

5.7.1.7.4 Enter 999-99-9999 if the client does not know his or her Social Security number or if the person creating the profile is otherwise unable to obtain it.

5.7.1.7.5 If the Social Security number entered matches the Social Security number in an existing client record in the context agency, an error message will appear.

5.7.1.7.5.1 Verify the Social Security number for this client.

5.7.1.7.5.2 Search for the Social Security number on the Client Search screen (see 5.5.1 and 5.5.3).

5.7.1.7.5.3 Set the Facility field to the null value (blank) when searching (see 5.5.1.4).

5.7.1.7.5.4 If one of the Social Security numbers is incorrect, correct it.

5.7.1.7.5.5 If the client's profile already exists DO NOT change the Social Security number to force OWITS to accept a duplicate profile.

5.7.1.7.5.6 If there are no errors in the Social Security numbers, and if it appears that two distinct clients are reporting the same Social Security number, enter the unknown value (999-99-9999) for the new client and investigate further as instructed by agency policies.

5.7.1.8 *Driver's License / State ID*

5.7.1.8.1 If the client has a driver license or state-issued identification card, enter its number in this field.

5.7.1.8.2 This field will accept alphabetic and numeric characters as well as special characters such as hyphens (-).

5.7.1.8.3 The adjacent drop-down menu allows for the selection of a state abbreviation.

5.7.1.8.3.1 This field includes abbreviations for all 50 of the United States as well as AFO/APO (military) locations, U.S. territories, and the Canadian provinces.

5.7.1.8.3.2 Select the double-hyphen value (--) if the client has no state-issued identification or if the client has a driver license or identification issued by another country.

5.7.1.8.4 Passports and other nationally issued identification numbers are captured in another screen (see 5.12).

5.7.1.9 *Has Paper File*

5.7.1.9.1 Indicate whether the client has a printed record as well as the electronic OWITS record.

5.7.1.10 *Provider Client ID*

5.7.1.10.1 Use this field for any internal identification number assigned to the client by the agency or facility.

5.7.1.10.2 This field will accept alphabetic and numeric characters as well as special characters such as hyphens (-).

5.7.1.10.3 Provider agencies that previously used the CPMS case number to internally identify clients may enter that number in this field.

5.7.1.10.3.1 If entered here, the CPMS case number should also be captured on another screen (see 5.12).

5.7.1.10.3.2 AMH will not search for CPMS numbers entered into this field.

5.7.1.11 *Unique Client Number*

5.7.1.11.1 This is an identification number exclusive to OWITS.

5.7.1.11.2 This field will automatically populate when the client profile is saved.

5.7.1.11.3 This field will not populate unless all required (yellow) fields on the Client Profile screen are filled and contain valid data.

5.7.1.12 *State Client ID*

5.7.1.12.1 This read-only field will automatically populate with a number created by AMH if this client's profile is connected to another client profile in another agency.

5.7.1.13 *Record Created By*

5.7.1.13.1 This read-only field will automatically populate with the name of the user who created this client profile.

5.7.1.14 *Last Updated By*

5.7.1.14.1 This read-only field will automatically populate with the name of the user who most recently modified this client profile.

5.7.1.15 *Created Date*

5.7.1.15.1 This read-only field will automatically populate with the date on which this client profile was created and saved.

5.7.1.16 *Last Updated Date*

5.7.1.16.1 This read-only field will automatically populate with the date on which this client profile was most recently modified.

5.7.1.17 *Alternate Names*

5.7.1.17.1 Data will appear in this table after other portions of the Client Profile are completed.

5.7.1.17.2 An "Add" link in the table header directs to the Alternate Names screen (5.8).

5.7.1.18 *Addresses*

5.7.1.18.1 Data will appear in this table after other portions of the Client Profile are completed.

5.7.1.18.2 An "Add" link in the table header directs to the Contact Info > Addresses screen (5.10.3).

5.7.1.19 *Administrative Actions*

5.7.1.19.1 The Administrative Actions box (not available to all users) contains two links.

5.7.1.19.2 The "Download C32" link allows users to download C32 data for the selected client in the form of an XML file.

5.7.1.19.3 The "View C32" link opens a pop-up window that allows users to view C32 data for the selected client.

5.7.1.19.4 C32 data (or "Continuity of Care Document") includes some client treatment data, such as diagnoses, vital signs, and tobacco use.

5.7.1.19.5 If the C32 document does not download or display correctly, see the Internet Explorer configuration constructions in OWITS Reference Manual, Volume 1: OWITS Basics.

5.7.2 When all the required fields (and others, if possible) have been filled, click Save.

5.7.2.1 A warning message will appear, stating, "At least one address is required."

5.7.2.1.1 Addresses will be added on the subsequent Contact Info screen (5.10).

5.7.2.1.2 The client profile can be saved without an address on file, but other aspects of client activity cannot be completed until at least one address is entered.

5.7.2.2 A warning message may appear stating that the client is under age 14 or over age 70.

5.7.2.2.1 Confirm that the client's date of birth was correctly entered.

5.7.2.2.2 If it is correct, ignore this warning message and continue.

5.7.2.2.3 If it is incorrect, correct it and click Save again.

5.7.3 If all of the required fields contain valid data, the client profile will be created.

5.7.3.1 A unique identification number will be created for the client, using aspects of the client's name, date of birth, and Social Security Number (see **Error! Reference source not found.**).

5.7.3.2 The client's name and identification number will appear in the Locator at the top of the screen, indicating that this is now the active client.

5.8 Click the Right Arrow to advance to Alternate Names, the second screen in the Client Profile series.

5.8.1 Alternate names are nicknames, shortened names, birth names, maiden names, aliases, and other names that are or have been used to identify the client.

5.8.2 To add an alternate name, click Add Alternate Name in the blue line beneath the Alternate Names table.

5.8.3 Three name fields will become available for data entry:

5.8.3.1 *First Name*

5.8.3.1.1 This is the client's alternate first name.

5.8.3.1.2 This field is required for all alternate names.

5.8.3.1.3 Special characters such as hyphens (-) are allowed in this field.

5.8.3.1.4 Use this field for shortened versions of first names, nicknames, former names, alias first names, or preferred names.

5.8.3.1.4.1 Example: Stephanie sometimes goes by Steph.

5.8.3.1.4.2 Example: Jonathan sometimes goes by JJ.

5.8.3.1.4.3 Example: Tanya changed her name to Tabitha when she moved away from her parents' home.

5.8.3.1.4.4 Example: Orson prefers to use his middle name of David.

5.8.3.2 *Middle Name*

5.8.3.2.1 This is the client's alternate middle name, if applicable.

5.8.3.2.2 An alternate middle name must be accompanied by a first name, which can be the client's legal name or a new or repeated alternate first name.

5.8.3.2.3 Special characters such as hyphens (-) are allowed in this field.

5.8.3.3 *Last Name*

5.8.3.3.1 This is the client's alternate last name, if applicable.

5.8.3.3.2 An alternate last name must be accompanied by a first name, which can be the client's legal name or a new or repeated alternate.

5.8.3.3.3 Special characters such as hyphens (-) are allowed in this field.

5.8.3.3.4 If the client has only one alternate last name, and if that was already entered in the Last Name at Birth field (5.7.1.4), it does not need to be entered again as an alternate name.

5.8.3.3.5 Use this field for maiden names or previous last names of clients whose name changed due to marriage or divorce.

5.8.3.3.6 Use this field for previous family names if the client was adopted (if that name is known and if legal restrictions do not prevent it from being added to health records) or if the client has assumed the last name of a guardian or step-parent.

5.8.3.3.7 Use this field for any alias last names the client has used in the past.

5.8.4 When all the required fields have been filled, click Save.

5.8.4.1 The alternate name entered will be added to the Alternate Names table (5.7.1.17).

5.8.5 Repeat steps 5.8.2 through 5.8.4 as needed to enter all the available alternate names.

5.9 Click the Right Arrow to advance to Additional Information, the third screen in the Client Profile series

5.9.1 Additional information includes more demographic details, some of which are required to complete steps beyond the client profile and some of which are required by federal and state reporting regulations.

5.9.2 The Additional Information screen contains the following fields:

5.9.2.1 *Ethnicity*

5.9.2.1.1 Ethnicity refers to the ethnic group with which the client most closely identifies.

5.9.2.1.2 Only one ethnicity may be selected.

5.9.2.1.3 The values in this drop-down menu are based on federal (TEDS) standards as well as the U.S. Census criteria, in which "Ethnicity" is primarily used to identify individuals of Hispanic origin.

5.9.2.2 *Race*

5.9.2.2.1 Race refers to the client's genetic background.

5.9.2.2.2 More than one race may be selected.

5.9.2.2.3 The values in this drop-down menu are based on federal (TEDS) standards as well as the U.S. Census criteria.

5.9.2.2.4 Select "Other Single Race" if the client is of Hispanic origin and not of any other race available in this field.

5.9.2.2.4.1 Hispanic origin must be indicated in the Ethnicity field (5.9.2.1).

5.9.2.3 *Special Needs*

5.9.2.3.1 Use this field to identify any unique needs or conditions which apply to the client, such as physical impairments or lifelong medical problems.

5.9.2.3.2 More than one special need may be selected.

5.9.2.4 *General Client Comments*

5.9.2.4.1 This field should include superficial notes about the client's overall health and condition, ongoing situation, lifelong problems, and other relevant information.

5.9.2.4.2 Details regarding special needs may be included in this field.

5.9.2.4.3 General Client Comments should not include specific details about the client's current substance abuse, addiction, or mental health problems or details about enrollment in a treatment or service program.

5.9.2.4.3.1 The Client Profile is a long-term record.

5.9.2.4.3.2 Multiple program enrollments and treatment episodes will be recorded with the same client profile.

5.9.2.4.4 This field may be updated or modified as needed.

5.9.2.5 *Sexual Orientation*

5.9.2.5.1 If desired, select the option that best describes the client's sexual orientation, status, or preferences.

5.9.2.6 *Religious Preference*

5.9.2.6.1 If applicable, select the option that best describes the client's preferred religion or religious orientation.

5.9.2.7 *English Fluency*

5.9.2.7.1 Select the option that best describes the client's ability to communicate in English.

5.9.2.8 *Preferred Language*

5.9.2.8.1 Select the language in which the client prefers to communicate.

5.9.2.8.2 This may or may not be the language in which the client is most fluent.

5.9.2.9 *Interpreter Needed*

5.9.2.9.1 Indicate if the client requires the assistance of an interpreter to communicate with agency or facility staff members.

5.9.2.9.2 Select "Yes" if the client requires an interpreter regardless of whether an interpreter is readily available (such as an agency or facility staff member).

5.9.2.10 *Veteran Status*

5.9.2.10.1 Select the option that best describes the client's status as a veteran of the United States armed forces.

5.9.2.11 *Citizenship*

5.9.2.11.1 Indicate the country of which the client is currently a citizen.

5.9.2.11.2 Clients visiting from other countries with a passport, visa, or other temporary permit should be recorded as being citizens of the country from which they are visiting.

5.9.2.11.3 Clients in the United States illegally should also be recorded as being citizens of the country from which they came to the United States.

5.9.2.11.3.1 A client's legal permission to be in the United States is not recorded or in any way addressed in OWITS.

5.9.2.11.3.2 Agency policies should dictate how to serve clients whose legal status in the United States is in question or in violation of existing applicable laws.

5.9.3 When all the required fields have been filled, click Save.

5.10 Click the Right Arrow to advance to Contact Info, the fourth screen in the Client Profile series.

5.10.1 Contact Info contains fields and tables for phone numbers and addresses that can be used to contact the client.

5.10.1.1 Client phone numbers appear in other OWITS modules, such as the Scheduler (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

5.10.1.2 At least one client address is required in order to complete the Client Profile and to complete other activity records.

5.10.2 Enter client phone numbers (if available) into the following fields.

5.10.2.1 *Home Phone #*

5.10.2.1.1 Enter the client's home phone number.

5.10.2.1.2 This should be the number of the client's primary or current residence.

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

5.10.2.2 *Work Phone #*

5.10.2.2.1 Enter the client's work phone number.

5.10.2.2.2 This should be the number most likely to connect to the client (directly or indirectly) at his or her place of employment.

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

5.10.2.3 *Mobile #*

5.10.2.3.1 Enter the client's cellular phone number.

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

5.10.2.4 *Other Phone #*

5.10.2.4.1 If the client has any additional phone numbers, enter one of them in this field.

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

5.10.2.5 *Fax #*

5.10.2.5.1 If the client has a fax number at which he or she can receive information about treatment or services, enter it in this field.

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

5.10.2.6 *Email Address*

5.10.2.6.1 If the client has an email address, enter it in this field.

5.10.2.6.2 If the client has more than one email address, enter his or her primary address only.

5.10.2.6.3 OWITS will accept only one email address in this field.

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

5.10.3 To add an address, click the "Add Address" link in the blue Addresses heading and complete the address fields on the Address Information screen.

5.10.3.1 *Address Type*

5.10.3.1.1 Select the option that best describes the address to be entered.

5.10.3.1.2 At least one Address Type must be selected and an address entered to complete a client profile.

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

5.10.3.1.4 For agencies using the OWITS billing functions, at least one of the client addresses must be a billing address ("Client Billing").

5.10.3.2 *Address Line 1*

5.10.3.2.1 Enter the client's address.

5.10.3.2.2 This address line should contain house or building number(s) and street name(s).

5.10.3.3 *Address Line 2*

5.10.3.3.1 Enter any additional parts of the client's address.

5.10.3.3.2 This address line should contain apartment, space, suite, or lot number(s).

5.10.3.3.3 If the address being entered is not in the United States, Canada, or a U.S. territory and is not an AFO/APO address, also enter the country in this field.

5.10.3.3.4 If the address being entered is not in the United States or a U.S. territory and is not an AFO/APO address, also enter the postal code in this field.

5.10.3.4 *City*

5.10.3.4.1 Enter the city in which the address is located.

5.10.3.5 *State*

5.10.3.5.1 Select the abbreviation for the state, Canadian province, U.S. territory, or AFO/APO.

5.10.3.5.2 If the address being entered is not in the United States, Canada, or a U.S. territory and is not an AFO/APO address, select the double-hyphen (--).

5.10.3.6 *Zip*

5.10.3.6.1 Enter the ZIP code associated with the address.

5.10.3.6.2 The ZIP code may use the standard five-digit ZIP format or the more specific nine-digit ZIP+4 format.

5.10.3.6.2.1 The ZIP+4 format is recommended.

5.10.3.6.3 Enter 99999 if the address being entered is not in the United States or a U.S. territory and is not an AFO/APO address.

5.10.3.7 *Confidential*

5.10.3.7.1 Select "Yes" to hide the client's address from OWITS users at other agencies.

5.10.3.7.2 Select "Yes" to hide the address when the client profile record is included in a referral (see OWITS Reference Manual, Volume 8: Consent and Referrals).

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

5.10.5 Repeat steps 5.10.3 through 5.10.4 to enter additional addresses as needed.

5.10.6 Click Save.

5.11 Click the Right Arrow to advance to Collateral Contacts, the fifth screen in the Client Profile series.

5.11.1 Collateral contacts are individuals who are involved with the client in his or her treatment or service efforts.

5.11.1.1 Collateral contacts may include parents, concerned friends or family members, physicians, psychiatrists, parole or probation officers, employers, etc.

5.11.1.2 Collateral contacts do not include staff members from the facility in which the client will be receiving treatment.

5.11.1.3 Collateral contacts may include agency staff members who are not normally assigned to the facility in which the client will be receiving treatment.

5.11.2 To add a collateral contact, click the "Add Contact" link on the right side of the screen.

5.11.3 The following fields will become available for data entry.

5.11.3.1 *First Name*

5.11.3.1.1 Enter the contact's first given name.

5.11.3.1.2 If the contact prefers to use a name other than his or her given name, enter the preferred name instead.

5.11.3.1.3 Special characters such as hyphens (-) are allowed in this field.

5.11.3.2 *Last Name*

5.11.3.2.1 Enter the contact's last name (also known as the family name or surname).

5.11.3.2.2 Multiple names are allowed in this field.

5.11.3.2.3 Special characters such as hyphens (-) are allowed.

5.11.3.3 *Relation*

5.11.3.3.1 Select the option that best describes the relationship between the collateral contact and the client.

5.11.3.3.2 Terms in this field refer to the collateral contact, meaning that selecting "Mother" indicates that the collateral contact is the client's mother or that selecting "Physician" indicates the collateral contact provides some form of medical services to the client.

5.11.3.4 *Gender*

5.11.3.4.1 Select the collateral contact's gender.

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

5.11.3.5 *Date of Birth*

5.11.3.5.1 Enter the contact's date of birth.

5.11.3.5.2 Acceptable date formats are MM/DD/YY or MM/DD/YYYY.

5.11.3.6 *SSN*

5.11.3.6.1 If needed, enter the contact's Social Security number.

5.11.3.6.2 Please use caution—the contact's Social Security number will be visible to all other staff members with access to client profile records (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs and Staff Records).

5.11.3.7 *Home Phone*

5.11.3.7.1 Enter the contact's home phone number.

5.11.3.7.2 This should be the number of the contact's primary or current residence.

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

5.11.3.8 *Work Phone*

5.11.3.8.1 Enter the contact's work phone number.

5.11.3.8.2 This should be the number most likely to connect to the contact (directly or indirectly) at his or her place of employment.

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

5.11.3.9 *Mobile*

5.11.3.9.1 Enter the contact's cellular phone number.

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

5.11.3.10 *Fax*

5.11.3.10.1 If the contact has a fax number at which he or she can receive correspondence regarding the client, enter it in this field.

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

5.11.3.11 *Other*

5.11.3.11.1 If the contact has any additional phone numbers, enter one of them in this field.

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

5.11.3.12 *Legal Guardian*

5.11.3.12.1 Indicate whether the contact has legal guardianship status over the client.

5.11.3.13 *Address 1*

5.11.3.13.1 Enter the contact's address.

5.11.3.13.2 This address line should contain house or building number(s) and street name(s).

5.11.3.14 *Address 2*

5.11.3.14.1 Enter any additional parts of the contact's address.

5.11.3.14.2 This address line should contain apartment, space, suite, or lot number(s).

5.11.3.14.3 If the address being entered is not in the United States, Canada, or a U.S. territory and is not an AFO/APO address, also enter the country in this field.

5.11.3.14.4 If the address being entered is not in the United States or a U.S. territory and is not an AFO/APO address, also enter the postal code in this field.

5.11.3.15 *City*

5.11.3.15.1 Enter the city in which the address is located.

5.11.3.16 *State*

5.11.3.16.1 Select the abbreviation for the state, Canadian province, U.S. territory, or AFO/APO.

5.11.3.16.2 If the address being entered is not in the United States, Canada, or a U.S. territory and is not an AFO/APO address, select the double-hyphen (--).

5.11.3.17 *Zip*

5.11.3.17.1 Enter the ZIP code associated with the address.

5.11.3.17.2 The ZIP code may use the standard five-digit ZIP format or the more specific nine-digit ZIP+4 format.

5.11.3.17.2.1 The ZIP+4 format is recommended.

5.11.3.17.3 Enter 99999 if the address being entered is not in the United States or a U.S. territory and is not an AFO/APO address.

5.11.3.18 *Can Contact*

5.11.3.18.1 Indicate whether the contact is willing and able to receive communication from the provider agency regarding the client.

5.11.3.19 *Consent on File*

5.11.3.19.1 Indicate whether the contact has consented to a release of their information as associated with the client's records.

5.11.3.20 *Notes*

5.11.3.20.1 Enter any additional information about the collateral contact.

5.11.3.20.2 Suggested notes include the contact's preferred method of communication, available hours, details about his or her relationship with the client or role in the client's treatment, etc.

5.11.3.21 *Created*

5.11.3.21.1 This read-only field will automatically populate with the date that the collateral contact was saved to this client's record.

5.11.3.22 *Last Update*

5.11.3.22.1 This read-only field will automatically populate with the date that this collateral contact record was most recently updated or modified.

5.11.3.23 *Active Date*

5.11.3.23.1 Enter the first date the person was or will be identified as a collateral contact for the client.

5.11.3.23.2 This is the first date that the person can be contacted about the client and/or the client's treatment.

5.11.3.23.3 This date may be in the future.

5.11.3.24 *Inactive Date*

5.11.3.24.1 Enter the date on which the person concluded or will conclude his or her role as a collateral contact for the client.

5.11.3.24.2 This is the last date that the person can be contacted about the client and/or the client's treatment.

5.11.3.24.3 Entering a date in this field will remove this person's name from the Consent record (see OWITS Reference Manual, Volume 8: Consent and Referrals).

5.11.3.24.4 This date may be in the future.

5.11.4 Click Save to add the collateral contact to the client's record.

5.11.5 Repeat steps 5.11.2 through 5.11.4 as needed to add more collateral contacts to the client's record.

5.12 Click the Right Arrow to advance to Other Numbers, the sixth screen in the Client Profile series.

5.12.1 Other numbers are means of identifying the client other than internal client record numbers or OWITS identification numbers.

5.12.2 If a CPMS number will be associated with the client's OWITS record, enter it here.

5.12.3 To add an Other Number entry to the client profile, click Add Other Number in the blue line beneath the Other Numbers table.

5.12.3.1 *Number Type*

5.12.3.1.1 Select the description that matches the type of client identification number.

5.12.3.1.2 This includes state-issued identification cards and licenses not captured on the Client Profile screen, case numbers, and other medical record numbers.

5.12.3.2 *Number*

5.12.3.2.1 Enter the number in this field.

5.12.3.2.2 Alphabetic, numeric, and special characters such as hyphens (-) are allowed.

5.12.3.2.3 When entering a state-issued identification or license number, add the state name or abbreviation in the Comments section (5.12.3.7).

5.12.3.3 *Start Date*

5.12.3.3.1 Enter the date on which the number was first issued or recorded.

5.12.3.3.2 This date may be estimated.

5.12.3.4 *End Date*

5.12.3.4.1 Enter the date on which the number will expire, become invalid, or no longer apply to the client.

5.12.3.4.2 If the number will always apply to the client or if no end date is known, leave this field blank.

5.12.3.5 *Status*

5.12.3.5.1 Use this field to indicate whether the number is currently active.

5.12.3.5.2 The Other Number is active if it is currently in use by the issuing organization for the client.

5.12.3.5.3 Example: A court case number is active if hearings, appeals, or other related legal proceedings are still in progress.

5.12.3.5.4 Example: The number on a driver license issued by another state is inactive if the license is expired or has been replaced by an Oregon driver license.

5.12.3.6 *Contact*

5.12.3.6.1 The available options in this field are the client's collateral contacts.

5.12.3.6.1.1 To add or modify collateral contacts, click the "Add Contact" link.

5.12.3.6.1.2 The Collateral Contacts screen will appear.

5.12.3.6.1.3 Add collateral contacts as needed (see 5.11.2 through 5.11.4).

5.12.3.6.1.4 Click Finish to return to the Other Numbers screen.

5.12.3.6.1.5 CAUTION: Using the Navigation View links to exit the Collateral Contacts screen when accessed from the Other Numbers screen will cancel any unsaved progress in the Client Profile.

5.12.3.6.2 If the other number is associated with one of the client's collateral contacts (5.11.1), select the contact's name.

5.12.3.6.2.1 Example: If the client is on probation, and if the client's probation officer was added as a collateral contact, enter the client's probation case number and select the name of the parole officer.

5.12.3.6.2.2 Example: If the client's physician was added as a collateral contact, enter the client's patient record number (as recorded by the clinic) and select the name of the physician.

5.12.3.7 *Comments*

5.12.3.7.1 Enter any additional details about the Other Number, if available, such as the state and/or country of an identification number or the CMHP and Provider number associated with a CPMS case number.

5.12.4 When all the required fields have been filled, click Save.

5.12.5 Repeat steps 5.12.3 through 5.12.4 to enter additional other numbers as needed.

5.13 Click Finish.

5.14 The required portions of the Client Profile section are now complete.

6.0 Adding Optional Information to a Client Profile

6.1 In the Navigation View, all 11 sections of the Client Profile are listed under heading Client List > Client Profile.

6.2 Six of those sections are not part of the client profile creation sequence.

6.2.1 *History*

6.2.1.1 This screen displays all user activity related to the client's record.

6.2.1.2 Recorded user activity includes creating or viewing the record as well as any actions that may have altered or otherwise affected it.

6.2.2 *Client Group Enrollment*

6.2.2.1 This screen displays the Payor List and allows users to enroll the client in benefit plans and government contracts for the payment of services rendered.

6.2.3 *Voucher*

6.2.3.1 This screen maintains a record of vouchers used.

6.2.3.2 Vouchers are primarily associated with ATR providers and may not appear for all OWITS users.

6.2.3.3 Instructions for voucher use and management are provided in the ATR User Guides.

6.2.3.4 To obtain copies of the ATR User Guides, please contact a Tier 2 system administrator at AMH (owits.support@state.or.us).

6.2.4 *Employment History*

6.2.4.1 This screen may be used to maintain a detailed record of the client's employment status and history.

6.2.5 *Allergies*

6.2.5.1 Clients' allergies are recorded here.

6.2.5.2 Users can request additional allergens and allergic reactions to be added to the lists of available options by contacting a Tier 2 system administrator at AMH (owits.support@state.or.us).

6.2.6 *Client External History*

6.2.6.1 This screen allows for external documents to be uploaded to OWITS, stored, and later retrieved.

6.3 To view the history associated with a client's record, click History in the Navigation View.

6.3.1 A table will display, indicating the date on which a change was applied to the client's record, the name of the user who was logged in when the change was applied, and a general description of the change.

6.3.2 Use the Navigation View links to exit this screen.

6.4 To access the Payor List, click Client Group Enrollment in the Navigation View.

6.4.1 For complete details regarding adding payor plans to client records, see OWITS Reference Manual, Volume 11: Billing.

6.4.2 To indicate that some or all of the client's expenses will be covered by active insurance coverage from private or federal funds, click the "Add Benefit Plan Enrollment" link in the Payor List heading and complete the screens as needed.

6.4.3 To indicate that some or all of the client's expenses will be covered by public funds, click the "Add Government Contract Enrollment" link in the Payor Plan heading and complete the screens as needed.

6.5 To access the client's employment history, click the Employment History link in the Navigation View.

6.5.1 To add a new period of employment, click the "Add New Employment" link in the Employment History table heading.

6.5.2 Enter data into the available fields.

6.5.2.1 *Employment Start Date*

6.5.2.1.1 Enter the date on which the client began a period of employment.

6.5.2.1.2 This date may be estimated.

6.5.2.2 *Employment End Date*

6.5.2.2.1 Enter the date on which the period of employment ended.

6.5.2.2.2 This date may be estimated.

6.5.2.2.3 If the client is still employed, leave this field blank.

6.5.2.3 *Employment Status*

6.5.2.3.1 Select the option that best describes the client's employment situation.

6.5.2.4 *Position*

6.5.2.4.1 Enter a brief description of the client's position or title.

6.5.2.5 *Employment Termination Reason*

6.5.2.5.1 Select the option that best describes why this period of employment ended.

6.5.2.5.2 If the client is still employed, leave this field blank.

6.5.2.6 *Name of Employer*

6.5.2.6.1 Enter the name of the employer associated with this period of employment.

6.5.2.6.2 If the client was placed in this position by an employment agency, enter the name of the organization for which work was actually performed instead of the name of the employment agency.

6.5.2.7 *Wage*

6.5.2.7.1 Enter a dollar amount, with or without punctuation.

6.5.2.7.2 OWITS will convert a recognizable dollar amount to the correct format.

6.5.2.7.3 Example: If "25" is entered, OWITS will convert it to "$25.00" instead.

6.5.2.7.4 Example: If "9.1" is entered, OWITS will convert it to "$9.10" instead.

6.5.2.8 *Wage Type*

6.5.2.8.1 Select the option that best describes the frequency at which the client received the amount of money indicated in the Wage field.

6.5.2.9 *Employment Type*

6.5.2.9.1 Select the option that best describes the employment as related to other employment options.

6.5.2.10 *Hours Type*

6.5.2.10.1 Select the option that best describes the schedule the client most often worked.

6.5.2.11 *Assisted By*

6.5.2.11.1 If applicable, select the option that best describes what individual or organization helped the client obtain or keep this employment.

6.5.2.12 *Average Hours Per Week*

6.5.2.12.1 Enter the average number of hours the client worked each week.

6.5.2.12.2 Enter whole numbers only.

6.5.2.13 *Level of Responsibility*

6.5.2.13.1 Select the option that best describes the client's responsibility within the employer's organization.

6.5.2.14 *Number of Work Days/Week*

6.5.2.14.1 Enter the average number of days the client worked each week.

6.5.2.14.2 Enter whole numbers only.

6.5.2.15 *Town*

6.5.2.15.1 If applicable, enter the name of the city or town in which the employment was located.

6.5.2.16 *Notes*

6.5.2.16.1 Enter any additional information as desired.

6.5.3 When all the required fields (and others as applicable) have been filled, click Save.

6.5.4 Repeat steps 6.5.1 through 6.5.3 as needed to add to the client's employment history.

6.5.5 Click Finish to return to the Client List screen.

6.6 To access the client's allergy records, click Allergies in the Navigation View.

6.6.1 To add an allergen, click the Add Allergy link in the blue line above the Allergy Profile display.

6.6.2 Enter data into the available fields.

6.6.2.1 *Type*

6.6.2.1.1 Select the category which best fits the type of allergy, such as Food or Drug.

6.6.2.1.2 The option selected in this field will determine which options are available in the Allergen field.

6.6.2.2 *Allergen*

6.6.2.2.1 Select the allergen.

6.6.2.2.2 If the client's allergen does not appear on this list, select a different allergen type.

6.6.2.2.3 If the client's allergen is not an available option, select the Other option that best fits the allergen.

6.6.2.2.3.1 Additional allergens can be added to the list if needed and if approved by OWITS system administrators (send requests to owits.support@state.or.us).

6.6.2.3 *Active*

6.6.2.3.1 Use this field to indicate whether the client's allergy is active.

6.6.2.3.2 An active allergy produces a response.

6.6.2.3.3 An inactive allergy has produced a response in the past but does not currently do so.

6.6.2.3.4 Example: Some children outgrow food allergies by the time they reach adulthood.

6.6.2.4 *Reactions*

6.6.2.4.1 Select the physiological evidence(s) of an allergic reaction associated with the selected allergen.

6.6.2.5 *Other*

6.6.2.5.1 If "Other" is selected as a reaction, this field will become available.

6.6.2.5.2 Enter any additional details about the selected allergy

6.6.2.5.3 If "Other" is selected as the allergen, specify the allergen in this field.

6.6.2.6 *Date Identified*

6.6.2.6.1 If known, enter the date on which the allergen was first recognized as an allergen.

6.6.2.6.2 This date may be estimated.

6.6.2.7 *By Whom*

6.6.2.7.1 Enter the name, title, relationship, or other description of the person who identified the allergen on or around the date indicated in the Date Identified field.

6.6.3 When all the required fields have been filled, click Save.

6.6.4 Repeat steps 6.6.1 through 6.6.3 as needed to add all of the client's allergies.

6.6.5 Click Finish to return to the Client List screen.

6.7 To add to or access uploaded documents associated with the client, click Client External History in the Navigation View.

6.7.1 Any file type may be uploaded to OWITS.

6.7.1.1 OWITS will accept only two files per client, per agency.

6.7.1.2 Files must each be smaller than 10 megabytes (mb).

6.7.1.3 Compressed files or folders (such as .ZIP and .RAR) are allowed.

6.7.1.3.1 To create a .ZIP folder in Windows, open Windows Explorer (as if browsing folders and files, usually through the "My Computer" icon).

6.7.1.3.2 Navigate to a folder that contains at least one file that will be uploaded.

6.7.1.3.3 Right-click in the white space in the folder window.

6.7.1.3.4 In the menu that appears, move the mouse pointer to "New" and click "Compressed (zipped) Folder."

6.7.1.3.5 A new folder will appear.

6.7.1.3.6 Rename the folder with a name that will make it easily identifiable and press Enter.

6.7.1.3.6.1 Ensure that the ".zip" extension is not changed.

6.7.1.3.7 Drag or copy the desired files into the new compressed folder.

6.7.1.3.8 The selected files will be compressed into the new folder, creating a single "zipped" file with all of the selected files inside it.

6.7.2 To add a document to this section, click the Add Document link in the blue heading labeled Client External List.

6.7.3 Enter data into the available fields.

6.7.3.1 *Type*

6.7.3.1.1 Select a categorical description that best fits the document type.

6.7.3.1.2 Example: Client Demographics might include copies of client identification or insurance cards.

6.7.3.1.3 Example: Client Signatures might include scans of signed consent forms.

6.7.3.1.4 Example: Lab Results might include results from tests performed at another agency.

6.7.3.2 *Other Type*

6.7.3.2.1 If "Other" is selected in the Type field (6.7.3.1), this field will become available.

6.7.3.2.2 Enter a categorical description that fits the document type.

6.7.3.2.3 Example: "Legal" might include forms signed by the client assigning power of attorney to a relative, proving legal United States citizenship status, or acknowledging receipt of clinical privacy practices documentation.

6.7.3.3 *Description*

6.7.3.3.1 If "Other" is selected in the Type field (6.7.3.1), this field will become available.

6.7.3.3.2 Enter a detailed description of the document.

6.7.3.3.3 Example: If "Legal" was entered in the Other Type (6.7.3.2) field, this field might contain, "Notarized power of attorney assigned to client's father."

6.7.3.4 *Start Date*

6.7.3.4.1 Enter the first date on which the file should be accessed.

6.7.3.4.2 The file will be available for downloading as soon as it is uploaded, but this field indicates to users that the file and its contents are not valid prior to the date entered.

6.7.3.4.3 This date may be in the future.

6.7.3.5 *End Date*

6.7.3.5.1 Enter the last date on which the file should be accessed.

6.7.3.5.2 The file will be available for downloading until it is deleted, but this field indicates to users that the file and its contents are no longer valid past the date entered.

6.7.3.5.3 This date may be in the future.

6.7.3.6 *Document Provided By*

6.7.3.6.1 Enter the name or description of the person or organization from which the document was originally obtained.

6.7.3.6.2 Example: If the document contains the client's medical history, this field might contain "Dr. Cramer – Primary Care Physician."

6.7.3.6.3 Example: If the document is a scan of the client's driver license, this field might contain "Oregon DMV."

6.7.3.7 *Decrypt Document*

6.7.3.7.1 Select "Yes" if the document to be uploaded has been encrypted by OWITS (see 6.7.5.3).

6.7.3.7.2 Select "No" or leave this field blank if the document to be uploaded has not been encrypted.

6.7.4 In the unlabeled text box, select a file to upload.

6.7.4.1 Click the button marked Browse.

6.7.4.2 A separate window will appear labeled Choose File.

6.7.4.3 Navigate through the available drives and folders to find the desired file.

6.7.4.4 Click on the desired file.

6.7.4.4.1 Only one file may be selected and uploaded at a time.

6.7.4.5 Click the button marked Open.

6.7.4.6 The Choose File window will close

6.7.4.7 The name and path of the selected file will appear in the unlabeled text box.

6.7.4.8 When all the required fields have been filled, click Upload.

6.7.5 Documents in the Client External List table of this section can be viewed, encrypted, and deleted.

6.7.5.1 Locate the desired document in the table.

6.7.5.2 To view the document, click the "Download" link in the Actions column.

6.7.5.2.1 A File Download window will appear with the option to Open, Save, or Cancel the file.

6.7.5.2.1.1 Open will view the file without saving it to the user's computer.

6.7.5.2.1.2 Save will save the file to the user's computer so it can be opened and/or modified later.

6.7.5.2.1.3 Cancel will stop the download process.

6.7.5.3 To download the document securely, click the "Encrypt&Download" link in the Actions column.

6.7.5.3.1 CAUTION: This function is not recommended for users who do not have decryption software on their computers.

6.7.5.3.2 Select "Save" in the File Download window that appears (6.7.5.2.1.2).

6.7.5.3.3 The file will not be readable unless it is first processed through decryption software.

6.7.5.3.4 To decrypt the document using OWITS, upload it again to the client's profile and select "Yes" in the Decrypt Document field (6.7.3.7).

6.7.5.4 To delete the document from the OWITS server, click the "Delete" link in the Actions column.

6.7.5.4.1 OWITS will confirm the delete command.

6.7.5.4.2 Click Yes to delete the document.

6.7.5.4.2.1 WARNING: This action cannot be undone.

6.7.5.4.2.2 A file deleted from the OWITS server cannot be retrieved.

6.7.5.4.3 Click No to cancel the delete command.

6.8 All actions taken and records added or modified will be applied to the client whose name is displayed in the Locator at the top of the screen.

6.8.1 To change this name, select a new client from the Client Search screen (4.3).

6.8.1.1 Perform a search to locate the desired client.

6.8.1.2 When the desired client is found, click the "Profile" or "Activity List" link in the Actions column of the Client List table (4.4.5).

6.8.1.3 The Locator will now display the name of the selected client, indicating the "active" client record.

6.8.2 To clear this name, click the "Add Client" link on the Client Search screen (5.6) as if ready to create a new client profile.

6.8.2.1 The client profile screen will open.

6.8.2.2 The client name in the Locator will be cleared.

6.8.2.3 Additional actions will not affect any client records until a new client profile is created or until an existing client is selected using the "Profile" or "Activity List" links in the Actions column of the Client List table (4.4.5).

6.8.2.4 Click Cancel to return to the Client Search screen.

7.0 Additional Client List Modules

7.1 *Benefit Application*

7.1.1 This module records the client's self-reported benefit applications.

7.1.2 This module is not currently configured for use in Oregon, but agencies and facilities may use it at their discretion.

7.2 *Linked Consents*

7.2.1 This module can be used to connect an existing client record in the agency with a client record coming in with a referral.

7.2.2 For details regarding Linked Consents and their use, see OWITS Reference Manual, Volume 8: Consent and Referrals.

7.3 *Non-Episode Contact*

7.3.1 This section records instances of communication between the client and the agency that occurs outside a treatment or service episode (7.5.1).

7.3.2 "Outside" an episode may include initial inquiries about services available, brief follow-up phone calls after a period of treatment or service has ended, requests for information, appointment scheduling, etc.

7.3.3 "Outside" an episode may include communication during a treatment episode that does not relate to any aspect of the current episode, such as might occur when a Substance Abuse client is identified as having a co-occurring Mental Health problem.

7.3.4 In-episode contact is recorded in the Notes module of the Activity List (7.4.1).

7.3.5 For details regarding Non-Episode Contact records and their use, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

7.4 *Activity List*

7.4.1 The Activity List is a large set of additional data entry modules designed to record, track, and report a client's progress through treatment and/or the services the client receives at a specific facility.

7.4.2 Most users will spend most of their time in OWITS using modules in the Activity List.

7.4.3 For details regarding the Activity List and its use, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

7.5 *Episode List*

7.5.1 An episode (also referred to in OWITS as a "case" or an "intake") describes a series of records related to the treatment or services a client receives within a specified date range at a specific facility.

7.5.2 For details regarding the Episode List and its use, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

8.0 Scheduler

8.1 OWITS contains a calendar tool that allows users to schedule appointments and other events.

8.1.1 Microsoft Silverlight must be installed in order for the Scheduler tool to function.

8.1.1.1 This software can be downloaded for no charge from Microsoft's website.

8.1.1.2 Internet Explorer may prompt users to download this software the first time the Scheduler is used on any computer.

8.1.2 All OWITS users will be able to view and modify their own schedules.

8.1.3 OWITS users with specific access rights will be able to view and modify the schedules of other users within the agency (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records).

8.1.4 It is not currently possible to synchronize the Scheduler tool with any other software, such as Microsoft Outlook.

8.2 Users can view their current schedules on the agency Home Page.

8.2.1 Navigate to the home page using the OWITS logo in the upper left corner of the screen or the "Home Page" link in the Navigation View.

8.2.2 The Schedule For table near the bottom of the screen will display all scheduled appointments and events for the current user on the current date.

8.2.3 Look up scheduled appointments and events for other dates as needed.

8.2.3.1 In the "Start Date" field of the Schedule For heading, enter the earliest date of appointments or events to be displayed.

8.2.3.2 In the "End Date" field of the Schedule For heading, enter the latest date of appointments or events to be displayed.

8.2.3.2.1 If no date is entered into this field, it will assume an infinite future date when the search is executed.

8.2.3.3 Click the "Refresh" link in the Schedule For heading.

8.2.3.4 Scheduled appointments and events within the dates entered will display.

8.3 View appointments and events in the Scheduler.

8.3.1 Click the "Edit/Add Schedule" link in the Schedule For heading.

8.3.2 A pop-up browser window will open.

8.3.2.1 Pop-ups must be enabled for this feature to function (see OWITS Reference Manual, Volume 1: OWITS Basics).

8.3.2.2 To avoid errors, maximize this pop-up window (using the square button in the upper right corner of the window) as soon as it opens.

8.3.2.3 The rest of OWITS will be inaccessible while the Scheduler pop-up window is open.

8.3.2.4 It may take a minute or two for Microsoft Silverlight to load.

8.3.3 The Scheduler tool will display.

8.3.3.1 The current user's schedule for the current day will display.

8.3.4 The black bar near the top of the screen contains navigational buttons.

8.3.4.1 *Day*

8.3.4.1.1 Click this button to display the schedule for a single day at a time.

8.3.4.2 *Week*

8.3.4.2.1 Click this button to display the schedule for a week at a time.

8.3.4.3 *Month*

8.3.4.3.1 Click this button to display the schedule for a month at a time.

8.3.4.4 *Timeline*

8.3.4.4.1 Click this button to display the schedule as a timeline, displaying one week at a time and listing the appointments and events without specifying start time, end time, or duration.

8.3.4.5 *Date*

8.3.4.5.1 The date indicator (close to the right end of the black bar) notes the current display.

8.3.4.5.2 If the Day box is selected (orange), this indicator will note the date currently displayed below.

8.3.4.5.3 If the Week box is selected (orange), this indicator will note the seven-day range currently displayed below.

8.3.4.5.4 If the Month box is selected (orange), this indicator will note the month currently displayed below.

8.3.4.5.5 If the Timeline box is selected (orange), this indicator will note the seven-day range currently displayed below.

8.3.4.6 *Left Arrow*

8.3.4.6.1 Use this button to navigate back by one day, one week, or one month, depending on the display selection.

8.3.4.7 *Calendar*

8.3.4.7.1 Use this button to open a small calendar.

8.3.4.7.2 Click on the desired date in the calendar to navigate the Scheduler directly to that date.

8.3.4.7.3 The left arrow in the calendar navigates back by one month.

8.3.4.7.4 The right arrow in the calendar navigates forward by one month.

8.3.4.7.5 The month and year displayed in the calendar will be indicated in the top bar.

8.3.4.7.6 The first column of the calendar shows the number of the week represented by the adjacent row of dates.

8.3.4.7.7 If the current date is displayed in the calendar, its number will be outlined with a black square.

8.3.4.7.8 The number of the day currently displayed in the Scheduler will be outlined in the calendar with an orange square.

8.3.4.7.9 The actual date currently displayed in the Scheduler will be highlighted in the calendar with an orange box.

8.3.4.8 *Right Arrow*

8.3.4.8.1 Use this button to navigate forward by one day, one week, or one month, depending on the display selection.

8.3.5 On the right side of the screen is a sidebar with additional tools.

8.3.5.1 *Today*

8.3.5.1.1 Click this button to navigate the calendar to the current date.

8.3.5.2 *Agency*

8.3.5.2.1 This field will automatically populate with the context agency that was selected when the Scheduler was opened (8.3.1).

8.3.5.2.2 Users with access to more than one agency may be able to change the selection in this field, which will change the available names in the Staff Members field below (8.3.5.3).

8.3.5.3 *Staff Members*

8.3.5.3.1 This field lists all of the staff members in the current agency whose schedules can be modified by the current user.

8.3.5.3.2 The current user's name will have been automatically selected.

8.3.5.3.3 Click the box next to a staff member's name to add a check mark and display that person's schedule.

8.3.5.3.4 Click a checked box next to a staff member's name to remove the check mark and hide that person's schedule.

8.3.5.3.5 While it is possible to view multiple calendars at once, it is not currently possible to add or copy appointments or events to multiple calendars at once.

8.3.5.4 *Interval*

8.3.5.4.1 This field displays the default duration for a new appointment or event.

8.3.5.4.2 Example: If the appointments or events to be added will all be 30 minutes long, select "30 minutes" in this field.

8.3.6 The schedule for the selected user(s) will display in the largest portion of the Scheduler window.

8.3.6.1 If multiple users have been selected (8.3.5.3.3), their schedules will display side-by-side.

8.3.6.2 At maximum resolution, the Scheduler can display up to ten staff members' records at once without compromising its usability.

8.4 Add appointments and events in the Scheduler.

8.4.1 After selecting the appropriate staff member (8.3.5.3.3) and interval (8.3.5.4), double-click on the desired day or time to create a new appointment or event.

8.4.1.1 If the Day (8.3.4.1) or Week (8.3.4.2) display is selected, double-click in the row that represents the desired start time.

8.4.1.2 If the Month (8.3.4.3) or Timeline (8.3.4.4) display is selected, double click in the box that represents the desired date.

8.4.2 The Scheduler Edit window will open within the Scheduler.

8.4.3 Enter information into the Scheduler Edit fields as appropriate to the appointment or event to be created.

8.4.3.1 *Summary*

8.4.3.1.1 Enter a brief description of the appointment or event.

8.4.3.1.2 This functions as the title of the appointment or event.

8.4.3.1.3 This field will display up to 41 characters at a time, including spaces, but will accept up to 120 characters.

8.4.3.2 *Staff*

8.4.3.2.1 This read-only field will automatically populate with the name of the staff member to whose schedule this appointment or event will be added.

8.4.3.2.2 If the name displayed in this field is not the desired staff member, click the Cancel button near the bottom of the Scheduler Edit screen and select the correct staff member.

8.4.3.3 *Start Time*

8.4.3.3.1 In the first of these two fields, enter the date on which the appointment or event will begin.

8.4.3.3.1.1 The date can be typed or selected using the calendar button on the right edge of the field.

8.4.3.3.1.2 This field will automatically populate with the date selected when the Scheduler Edit window was opened (see 8.4.1).

8.4.3.3.2 In the second of these two fields, enter the time at which the appointment or event will begin.

8.4.3.3.2.1 If the Day or Week display was selected when the Scheduler Edit window was opened, this field will automatically populate with the time selected (see 8.4.1).

8.4.3.3.2.2 If the Month or Timeline display was selected when the Scheduler Edit window was opened, this field will automatically populate with 12:00 AM (Midnight).

8.4.3.4 *End Time*

8.4.3.4.1 In the first of these two fields, enter the date on which the appointment or event will end.

8.4.3.4.1.1 The date can be typed or selected using the calendar button on the right edge of the field.

8.4.3.4.1.2 If the Day or Week display was selected when the Scheduler Edit window was opened, this field will automatically populate with the date selected (see 8.4.1).

8.4.3.4.1.3 If the Month or Timeline display was selected when the Scheduler Edit window was opened, this field will automatically populate with one day later than the date selected (suggesting an all-day appointment or event).

8.4.3.4.2 In the second of these two fields, enter the time at which the appointment or event will end.

8.4.3.4.2.1 If the Day or Week display was selected when the Scheduler Edit window was opened, this field will automatically calculate an end time by adding the number of minutes selected in the Interval field (8.3.5.4) to the time that automatically populated in the Start Time field (8.4.3.3.2.1).

8.4.3.4.2.2 If the Month or Timeline display was selected when the Scheduler Edit window was opened, this field will automatically populate with 12:00 AM (Midnight).

8.4.3.5 *Description*

8.4.3.5.1 Enter a textual description of the appointment or event.

8.4.3.5.2 Enter any additional information that may be relevant to the staff member for whom this appointment or event applies.

8.4.3.6 *Client Phone*

8.4.3.6.1 This read-only field will populate with the phone numbers entered in the phone number fields on the client's Contact Info screen (see 5.10).

8.4.3.6.2 This field will remain blank until a client is selected in the Client field below (8.4.3.11).

8.4.3.7 *Schedule Event Type*

8.4.3.7.1 Select the option that best categorizes this appointment or event.

8.4.3.8 *Status*

8.4.3.8.1 Select the option that best describes the current state of this appointment or event.

8.4.3.8.2 This field will automatically populate with "Scheduled" for new appointments or events.

8.4.3.8.3 Other options include statuses such as "Complete" and "Rescheduled."

8.4.3.9 *Appointment Type*

8.4.3.9.1 Select "Normal" for an appointment that does not involve contact with or services for an individual client.

8.4.3.9.2 Select "Scheduled Client" for an appointment that involves direct contact with or services provided for an individual client.

8.4.3.9.3 Select "Scheduled Group" for an appointment for a group session.

8.4.3.10 *Procedure*

8.4.3.10.1 This field will only become available if "Scheduled Client" or "Scheduled Group" is selected in the Appointment Type field above (8.4.3.9).

8.4.3.10.2 Select the procedure code and description that best fits the service that will be provided to the client during this appointment, event, or session.

8.4.3.10.3 It may be necessary to use the scroll wheel on the mouse to locate the correct procedure.

8.4.3.10.4 CAUTION: The options available in this field are not filtered by treatment domain (Mental Health or Substance Abuse), making it possible to select a mental health procedure for a substance abuse client and vice versa.

8.4.3.10.5 The procedure selected in this field will determine which service codes appear first when creating an encounter note directly from this appointment (see 8.8).

8.4.3.10.6 This field can be modified after the appointment or event has been created if an incorrect procedure was selected.

8.4.3.11 *Client*

8.4.3.11.1 This field will only become available if "Scheduled Client" is selected in the Appointment Type field above (8.4.3.9) and will be required before the appointment can be saved.

8.4.3.11.2 Use this field to select the client for whom the appointment is scheduled.

8.4.3.11.2.1 Type the first few letters of the client's first or last name.

8.4.3.11.2.2 A list of clients whose names match the letters entered will appear.

8.4.3.11.2.3 Select the correct client from the list.

8.4.3.11.3 Selecting a client will cause the Client Phone field (8.4.3.6) to populate with any phone numbers added to the client's profile.

8.4.3.12 *Group*

8.4.3.12.1 This field will replace the "Client" field but will only become visible if "Scheduled Group" is selected in the Appointment Type field above (8.4.3.9) and will be required before the appointment can be saved.

8.4.3.12.2 Select the name of the group for which the group session appointment will be created.

8.4.3.12.2.1 Group names for the entire agency are listed.

8.4.3.12.2.2 Group names include the facility name in parentheses.

8.4.3.13 *Contracting Agency*

8.4.3.13.1 This field is not currently enabled for use in Oregon.

8.4.3.14 *Modality*

8.4.3.14.1 This field is not currently enabled for use in Oregon.

8.4.4 If needed, set the appointment or event to reoccur.

8.4.4.1 Click the Edit Recurrence button at the bottom of the Scheduler Edit window.

8.4.4.2 The Recurrence Edit window will display.

8.4.4.3 In the Recurrence Pattern section, select the days of the week on which this appointment or event will be repeated.

8.4.4.3.1 Multiple days can be selected at a time.

8.4.4.4 In the Range of Recurrence section, indicate when the appointment or event should no longer reappear in the scheduler.

8.4.4.4.1 To specify the last date on which the appointment or event will reoccur, select "End By" and enter a date.

8.4.4.4.2 To specify how many times the appointment or event will reoccur, select "End After" and enter the total number of recurrences.

8.4.4.5 Click Select when finished.

8.4.4.6 Click Cancel to discard changes and return to the Scheduler Edit window.

8.4.5 Click the Save & Close button when finished to apply the appointment or event to the calendar.

8.4.6 If finished, close the Scheduler window to return to the OWITS Home Page.

8.4.6.1 The Home Page may refresh to apply any calendar changes to the Schedule For table.

8.5 Modify existing appointments and events in the Scheduler.

8.5.1 After selecting the appropriate staff member (see 8.3.5.3), locate the desired appointment or event in the calendar.

8.5.1.1 It may be useful to switch to the Month display (8.3.4.3) to locate the appointment or event more quickly.

8.5.2 Double-click the appointment or event to be modified.

8.5.3 The Scheduler Edit window will open within the Scheduler.

8.5.3.1 CAUTION: To avoid loss of data entry fields, do not resize the Scheduler window while the Scheduler Edit window is open.

8.5.4 Edit the information into the Scheduler Edit fields as appropriate.

8.5.5 Click the Save & Close button when finished to apply the changes to appointment or event in the calendar.

8.5.6 If finished, close the Scheduler window to return to the OWITS Home Page.

8.5.6.1 The Home Page may refresh to apply any calendar changes to the Schedule For table.

8.6 Delete existing appointments and events in the Scheduler.

8.6.1 After selecting the appropriate staff member (see 8.3.5.3), locate the desired appointment or event in the calendar.

8.6.1.1 It may be useful to switch to the Month display (8.3.4.3) to locate the appointment or event more quickly.

8.6.2 Click on the appointment or event to be modified.

8.6.3 Press the Delete key or click the tiny *x* in the upper right corner of the appointment listing.

8.6.3.1 Scheduler will confirm the delete command.

8.6.3.2 The selected appointment or event will be deleted and will no longer appear on the staff member's calendar or schedule.

8.6.3.3 This action cannot be undone.

8.6.3.4 Any encounters that may have been created from a scheduled appointment (see 8.8) will not be affected.

8.6.4 If finished, close the Scheduler window to return to the OWITS Home Page.

8.6.4.1 The Home Page may refresh to apply any calendar changes to the Schedule For table.

8.7 Modify existing appointments from the Home Page calendar.

8.7.1 After appointments or events have been created in the Scheduler (see 8.4), they can be viewed and modified individually.

8.7.2 On the OWITS Home Page, search for the desired appointment or event in the Schedule For table (see 8.2.3).

8.7.3 Click the "Review" link in the Actions column for the desired appointment or event.

8.7.4 A pop-up window will open containing the information and fields found in the Scheduler Edit window inside the Scheduler (see 8.4.3).

8.7.4.1 Modify the Scheduler Edit fields if needed.

8.7.5 Click the Save & Close button when finished to apply the changes to appointment or event in the calendar.

8.7.5.1 The Home Page may refresh to apply any changes to the Schedule For table.

8.8 Service encounter records can be created from scheduled appointments.

8.8.1 On the OWITS Home Page, search for the desired appointment or event in the Schedule For table (see 8.2.3).

8.8.2 Click the "Create Encounter" link in the Actions column for the desired appointment.

8.8.3 The Encounter screen will display.

8.8.4 Complete the available fields as appropriate.

8.8.4.1 For full instructions regarding the Encounter screen, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

8.8.5 The Service field will automatically populate.

8.8.5.1 This field will be filtered, moving services related to the procedure selected in the Scheduler (8.4.3.10) to the top of the list.

8.8.5.2 The first service related to the selected procedure will be automatically selected.

8.8.5.3 For further details on creating encounter records, see OWITS Reference Manual, Volume 5: Client Activity and Contact.

8.8.6 Some of the other available fields will automatically populate with data from the Scheduler, including:

8.8.6.1 *Start Date*

8.8.6.2 *End Date*

8.8.6.3 *Start Time*

8.8.6.4 *End Time*

8.8.6.5 *Duration*

8.8.6.6 *Service Location*

8.8.6.7 *Rendering Staff*

8.8.7 When finished, click Finish to exit to the Encounters screen.

8.8.8 When an encounter has been created from the scheduled appointment, the Schedule For table on the Home Page will display a "View Encounter" link in the Actions column where the "Create Encounter" link used to be (see 8.8.2).

Appendix A – Example of CPMS Mental Health Enrollment Form

DHS
Oregon Department of Human Services
CPMS - OMHAS

CLIENT PROCESS MONITORING SYSTEM

White - Local Copy   Yellow - State Copy

Mental Health
Basic or Residential Services
Enrollment Form

☐ Check box if correction

___/___/___ Date of Correction

Clinic Identification
3 CMHP
4 Provider

5 Opening Date
Month   Day   Year

6 Name (USE UPPER CASE BLOCK LETTERS)
Last   First   Birth Name

7 Case Number

8 Date of Birth
1 - Known
2 - Estimated
Month   Day   Year

9 Legal Status
100 - Voluntary
500 - Involuntary Civil
600 - Involuntary Criminal

10 Eligibility Code
Codes on back of form.

12 Gender
F = Female
M = Male

13 Education
Highest grade completed.

14 School/Training
Now enrolled in school or training?
1 = Yes   2 = No

15 Referral Source
Codes on back of form.

17 Estimated Gross Household Monthly Income
Enter income or
0001 = Refused
0002 = Unknown
9999 = More than $9,999

18 Residence Code
County or State code
Codes on back of form.

19 Race/Ethnicity
01 - White (Non-Hispanic)
02 - Black (Non-Hispanic)
03 - Native American
04 - Alaskan Native
05 - Asian
06 - Hispanic (Mexican)
07 - Hispanic (Puerto Rican)
08 - Hispanic (Cuban)
09 - Other Hispanic
10 - Southeast Asian
11 - Other Race
12 - Native Hawaiian/ Other Pacific Islander

21 Marital Status
1 - Never Married
2 - Married
3 - Widowed
4 - Divorced
5 - Separated
6 - Living as Married

22 Living Arrangement
01 - Private residence - alone
02 - Private residence - w/spouse or significant other
03 - Private residence - w/parent, relative, adult child(ren)
06 - Private residence - w/friend(s) or other unrelated person(s)
(More codes on back of form.)

23 Number of Dependents
Enter the total number of people in each age group that are dependent upon the income indicated in item #17
(including the consumer)
0 - 5   6 - 17   18 - 64   65+

24 Source of Income
Mark only one box. Enter a "1" next to the primary source.
Wages, Salary
Public Assistance
Other
None

25 Employment Status
1 - Full time (35 hours or more)
2 - Part time (17 - 34 hours)
3 - Irregular (less than 17 hours)
4 - Not employed (but has sought employment)
5 - Not employed (and has not sought employment)

29 Prime Number
Enter the Consumers' Medicaid Recipient Prime Number

33 Employability Factor
0 - Employable or working now
1 - Student
2 - Homemaker
3 - Retired
4 - Unable for physical or psychological reasons
5 - Incarcerated
6 - Seasonal worker
7 - Temporary layoff

92 Diagnostic Impression
01 - Not mentally ill/diagnosis deferred
02 - Delirium, Dementia, Amnesic and other Cognitive disorders
03 - Substance-related disorders
05 - Schizophrenia and other psychotic disorders
06 - Mood disorders
09 - Anxiety disorders
10 - Adjustment disorders
11 - Personality disorders
14 - Disorders usually diagnosed in infancy childhood or adolescence
16 - Eating disorders
19 - Dissociative disorders
17 - Other
18 - Unknown
Primary   Secondary

75 Level of Functioning
Enter the Level of Function based on the Global Assessment of Functioning (GAF) Scale.
You may also use the Children's Global Assessment Scale (CGAS).
Range = 0 - 100
Did you use the CGAS?
Y - Yes
N - No

Form Number MHD-ADMS-0189
Revision Number 10/03

Appendix B – Example of CPMS Alcohol & Drug Enrollment Form

State of Oregon
CPMS AMH
Department of Human

CLIENT PROCESS MONITORING SYSTEM

ALCOHOL & DRUG
ENROLLMENT FORM

Current User Id:

ADULT TREATMENT

CLINIC IDENTIFICATION

3 CMHP

4 PROVIDER

5 OPENING DAT

6 NAME (USE UPPER CASE BLOCK LETTERS)

LAST

FIRST

BIRTH NAME

7 CASE NUMBER

8 DATE OF BIRTH

10 ELIGIBILITY CODE

11 Program Area:

1-ALCOHOL 2-DRUG

116. Level of Care Assessed
Enter the Level of Care for which the client was assessed.

12 SEX
F=Female
M=Male

106 PRENATAL
Client Pregnant at Enrollment?

107 INTERPRETER
Will interpreter services be needed for client?

13 EDUCATION
Highest Grade Completed

14 SCHOOL/TRAINING
Now Enrolled in School or Training?

15 Referral Source(s)
Select First Appropriate Code(s) From Top of List.

17 ESTIMATED GROSS HOUSEHOLD MONTHLY INCOME
ENTER ACTUAL INCOME
0000=NO INCOME 0001=REFUSED
9999=MORE THAN $9999/MONTH

18 CLIENT PRIMARY RESIDENCE
COUNTY OR STATE CODE

115 Zip Code of Residence
Enter Zip code of Residence or enter 00001 - Transient

19 RACE/ETHNICITY

20 HEALTH INSURANCE
Choose primary sourc

21 MARITAL STATUS

22 LIVING ARRANGEMENT
Enter First Appropriate Code

23 DEPENDENTS
ENTER THE TOTAL NUMBER OF PEOPLE IN EACH AGE GROUP THAT ARE DEPENDENT UPON THE INCOME INDICATED IN ITEM #17 (INCLUDING THE CLIENT)

under 6	6 - 17	18 - 64	65+

24 SOURCE OF HOUSEHOLD INCOME
Choose the Primary Source

25 EMPLOYMENT STATUS

33 EMPLOYABILITY FACTOR

124 SELF HELP
Frequency of Self Help Attendance 30 Days Before Enrollment

31 TOTAL ARRESTS
In past 5 years

32 DUII ARRESTS
In past 5 years

122 RECENT ARRESTS
In the last 30 days before treatmen

34 METHADONE

117 Level of Care at Admission
Enter the Level of Care for which the client was admitted

PATTERNS OF ABUSE	PRIMARY SUBSTANCE	SECONDARY SUBSTANCE	TERTIARY SUBSTANCE
36 ADDICTION TYPE(S) Complete all blocks			
38 FREQUENCY OF USE OR DEGREE OF IMPAIRMENT			
39 MOST RECENT USUAL ROUTE OF ADMINISTRATION			
40 AGE AT FIRST USE (00 = Affected at Birth)			

Appendix C – 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 D – 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	September 5, 2012	Instructions for Client Search added.
Justin D. King	September 18, 2012	Definitions table updated; Description and Purpose added.
Justin D. King	October 12, 2012	Some date fields no longer automatically populate with the current date.
Justin D. King	December 24, 2012	Corrected a formatting error.
Justin D. King	January 3, 2013	Added instructions for using the Scheduler.
Justin D. King	January 16, 2013	Alternate name search function.
Justin D. King	February 14, 2013	Added instructions for changing active client records and clearing client names from the Locator.
Justin D. King	March 13, 2013	Updated instructions for Last Name at Birth field.
Justin D. King	December 31, 2013	Added link to Navigation Map. Updated Employment History instructions.