OWITS Reference Manual

Volume 8

Consent and Referrals

Revision 1-1

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Description

This manual describes the sharing of information among OWITS agencies and facilities and from an OWITS agency to a non-OWITS entity.

Purpose

To clarify the process by which client information is shared using the available OWITS modules.

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*.
- Browser: Computer software used to locate, retrieve, and display content on the World Wide Web.
- Button: An image or icon on a computer screen that executes a command when clicked, such as "the OK button" or "the Cancel button."
- Character: A single unit of information, including letters, numerical digits, punctuation marks, spaces, and symbols.
- Click: To press a button on a computer mouse. "Click" refers to pressing the left mouse button once. "Double-click" refers to pressing the left mouse button twice in rapid succession. "Right-click" refers to pressing the right mouse button once.
- Client: An individual who is receiving, has received, or will receive treatment or services.
- Data / Dataset: Pieces of information or groups of pieces of information.
- Default: A preset setting or value; an option that is automatically selected in every situation.
- 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.
- DUII: Driving Under the Influence of Intoxicants – In Oregon, a Class A misdemeanor or a Class C felony charged against individuals who operate a motor vehicle on public roadways while under the influence of an intoxicating substance, including alcohol, controlled substances, and inhalants. In OWITS, the term DUII is most often related to substance abuse treatment in which courts require clients to demonstrate at least 90 days abstinence from alcohol and other drugs and the client's successful discharge from treatment before reinstating his or her driver's license or other legal privileges.
- 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.

- GPRA: Government Performance and Results Act – a law enacted in 1993 designed to improve government project management. In OWITS, GPRA also refers to a data collection tool to evaluate substance abuse treatment and prevention.
- Heading / Subheading: The title of an OWITS module or of divisions and screens within OWITS modules. See also *Module*.
- 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.
- 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.
- PDF: Portable Document Format – A type of computer file that contains a complete document in a format readable on most operating systems.
- 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.
- Table: A grid of information with rows of information divided into categorical columns.
- Text Box: A bordered square or rectangle in a web page into which users can type text.
- Treatment Domain: A designation in OWITS client records that separates some client information based on the type of treatment or service administered.
- TX: An abbreviation for “treatment” often used in OWITS.
- 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 Consent and Referral Records

1.1 As an electronic health record, OWITS offers the ability to share data.

1.2 Providers, clinicians, and other users can share client data with other OWITS agencies in a read-only format using the "Consent" functions.

1.2.1 In OWITS, a "consent" refers to the client's agreement that his or her treatment data can be shared with authorized parties.

1.2.2 This is often also known as a "release of information" agreement.

1.2.3 OWITS does not currently contain functions specifically designed to record a client's consent to receive treatment.

1.2.3.1 It is possible to upload a scanned image of a signed "consent to treat" form using the Client External History module (see OWITS Reference Manual, Volume 4: Client Profile).

1.2.3.2 It is possible to use the Miscellaneous Notes module to record a client's consent to receive treatment (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

1.3 Providers, clinicians, and other users can transfer client records from one OWITS agency to another using the "Referral" functions.

1.3.1 A referral sends client data in an editable state and treatment data in a read-only state.

1.3.2 OWITS cannot transfer data to other electronic health record systems, but referrals to other agencies can still be recorded.

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

2.0 Configure Agency Records to Share Client Data

2.1 Before consenting or referring client data, at least one agency disclosure domain must be configured.

2.1.1 Disclosure domains provide a shortcut to creating client consent and referral records, allowing users to spend less time on individual client records.

2.1.2 At least one disclosure domain is required before agencies can share client data either by consent or referral.

2.1.3 This step should be completed at least once early in the agency setup process (see OWITS Reference Manual, Volume 3: Agencies, Facilities, Programs, and Staff Records).

2.1.4 This step can be completed as often as needed to configure multiple disclosures to multiple agencies and for multiple situations.

2.2 Navigate to Agency > Agency List > Relationships > Disclosure.

2.2.1 The Agency Disclosure Domain List will display.

2.2.2 The Agency Disclosure Domain table lists disclosure domains that have been created for the current ("context") agency.

2.2.3 Users with access to multiple agencies can change the contents of this list by selecting a different option in the Agency Name field near the top of the screen.

2.3 Create new disclosure domains as needed.

2.3.1 Click the "Add Agency Disclosure Domain Record" link in the Agency Disclosure Domain List heading.

2.3.2 The Agency Disclosure Domain screen will display.

2.3.3 Complete the Agency Disclosure Domain section, which consists of the following fields:

2.3.3.1 *Disclosing Agency*

2.3.3.1.1 Select the name of the agency from which the client information will be shared.

2.3.3.1.2 This field may automatically populate with the name of the context agency.

2.3.3.2 *Receiving Agency*

2.3.3.2.1 Select the name of the agency that will receive the shared client information.

2.3.3.2.2 Select "Global Policy or Non System" for recording the sharing of client information with individuals or organizations that do not use or have access to OWITS.

2.3.3.2.3 Select "Global Policy of Non System" to create a default disclosure domain that can be used in nearly all consent or referral situations.

2.3.3.3 *Receiving Entity (Non System Agency)*

2.3.3.3.1 If "Global Policy or Non System" was selected in the Receiving Agency field above (2.3.3.2), and if this disclosure domain represents an individual or organization that does not use or have access to OWITS (see 1.3.2), enter its name or a brief description into this field.

2.3.3.3.2 Selecting any other option in the Receiving Agency field above will make this field unavailable (read-only).

2.3.3.4 *Global Policy? (Available To All Agencies)*

2.3.3.4.1 This field will automatically populate with "Yes" if "Global Policy or Non System" selected in the Receiving Agency field above (2.3.3.2).

2.3.3.5 *Always Verify Consent?*

2.3.3.5.1 This field has not been configured for a specific use in OWITS.

2.3.3.5.2 To avoid potential difficulties, select "Yes."

2.3.4 Complete the Disclosure Domain Selection section.

2.3.4.1 In the Consent Options field, select aspects of the client records that will be shared when consent and referral records are created using this disclosure domain.

2.3.4.1.1 Hold down the CTRL key while clicking to select multiple options at once.

2.3.4.1.2 Hold down the SHIFT key while clicking to select a range of options at once.

2.3.4.1.3 Some of the options available in this field are not currently used in OWITS, including:

2.3.4.1.3.1 *ECourt*

2.3.4.1.3.2 *GAIN-I Summary*

2.3.4.1.3.3 *GAIN-Q Assessment*

2.3.4.1.4 The Group List module and some of the modules in the Activity List (see OWITS Reference Manual, Volume 5: Client Activity and Contact) are not available for sharing by way of a consent or referral record, including:

2.3.4.1.4.1 *Lab/Radiology*

2.3.4.1.4.2 *Fee Determination*

2.3.4.1.4.3 *Wait List*

2.3.4.1.4.4 *TX Team*

2.3.4.1.4.5 *Screening > BH/BI*

2.3.4.1.4.6 *Program Enrollment*

2.3.4.1.4.7 *Diagnosis List*

2.3.4.1.4.8 *Recovery Plan*

2.3.4.1.4.9 *Recovery Plan Review*

2.3.4.2 Use the Consent Expires Upon options to indicate when the shared information will no longer be available to the receiving agency or entity.

2.3.4.2.1 Select "Discharge (UD)" to indicate that the shared information will no longer be available a specified number of days after the date on which the client is discharged from treatment.

2.3.4.2.1.1 This selection will apply only to the episode in which the consent or referral record is created (see 3.4).

2.3.4.2.1.2 If the episode in which the consent or referral record is created does not have a discharge record, the disclosed data will not expire.

2.3.4.2.1.3 If a client is discharged and later admitted again, the disclosed data will still expire unless it is disclosed again.

2.3.4.2.2 Select "Date Signed (DS)" to indicate that shared information will no longer be available a specified number of days after the date on which the client agrees to a release of the selected information.

2.3.4.2.3 In the "+ Days" fields, enter the number of days that must elapse after the selected event before the disclosed data becomes unavailable.

2.3.4.2.3.1 Example: To make an element of client data available to another agency for one year after the client concludes treatment, select the "Discharged (UD)" option and enter "365" in the first of the two "+ Days" fields.

2.3.4.2.3.2 Example: To make an element of client data available to another agency for two years after the client agrees to share the selected data, select the "Date Signed (DS)" option and enter "730" in the second of the two "+ Days" fields.

2.3.4.2.4 Only one expiration criterion (Discharge or Date Signed) may be selected at a time.

2.3.4.3 When the desired treatment records have been selected (2.3.4.1) and the expiration criteria have been assigned (2.3.4.2), click the right arrow to move the selections to the Selected Options field.

2.3.4.3.1 Example: Selecting "Admission" and indicating that it will become unavailable 90 days after the date of discharge will create a selected option of "Admission (UD, + 90)."

2.3.4.3.2 Example: Selecting "Mental Health Assessment" and indicating that it will become unavailable 180 days after the date of discharge will create a selected option of "Mental Health Assessment (DS, +180)."

2.3.4.4 To remove an entry from the Selected Options field, select the desired option and click the left arrow.

2.3.4.4.1 The option will be returned to the Consent Options field.

2.3.4.4.2 The expiration criteria will be removed.

2.3.5 Enter any additional relevant information into the text box in the Comments section.

2.3.5.1 This might include a general description of the disclosure domain's purpose, such as "for referring substance abuse clients who are also diagnosed with a mental health problem" or "for transferring child or adolescent clients who reach adulthood during treatment."

2.3.6 Click Finish.

2.3.7 Repeat steps 2.3.1 through 2.3.6 until all desired disclosure domains have been created.

2.3.7.1 Disclosure domains can be edited as needed.

2.3.7.2 New disclosure domains can be added as needed.

2.3.7.3 Multiple disclosure domains can be created for each receiving agency.

2.3.7.4 More pre-configured disclosure domains means more available shortcuts when creating consent and referral records for individual clients.

2.4 To view or modify an existing disclosure domain, click the "Review" link in the Actions column of the Agency Disclosure Domain List (2.2.1) for the desired record.

2.4.1 The Agency Disclosure Domain screen will display.

2.4.2 Modify the data as needed.

2.4.3 Click Finish to return to the Agency Disclosure Domain List.

2.5 To delete an existing disclosure domain, click the "Delete" link in the Actions column of the Agency Disclosure Domain List (2.2.1) for the desired record.

2.5.1 OWITS will confirm the delete command.

2.5.2 The disclosure domain will be deleted.

2.5.3 This action cannot be undone.

2.5.4 Deleting a disclosure domain will not delete any consent or referral records that have previously been created for clients.

3.0 Accessing Client Records for Consent and Referral

3.1 To complete the consent and referral processes for any client, the client's record must first be selected.

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 Locate the client's record.

3.3.1 In the Navigation View, click the "Client List" link.

3.3.2 The Client Search page will display.

3.3.3 Perform a search to locate the client's profile.

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

3.3.3.2 Use wildcards (such as asterisks or question marks) if multiple name spellings are possible.

3.3.3.2.1 For details regarding the specific actions of wildcard characters, see OWITS Reference Manual, Volume 1: OWITS Basics.

3.3.3.3 If the desired client does not appear, it may be necessary to set the Facility field to the null (blank) value.

3.3.3.3.1 Searches will be limited to the selected agency.

3.3.3.3.2 Client Profiles are saved at the Agency record and will not be visible to specific facilities until an Intake is complete.

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

3.3.4 If a profile does not already exist, a new profile must be created (see OWITS Reference Manual, Volume 4: Client Profile) and data added to the activity list (see OWITS Reference Manual, Volume 5: Client Activity and Contact) before consent and referral records can be created.

3.3.4.1 A Client Profile record must be created for the client before any other records can be added.

3.3.4.2 At a minimum, the client's Activity List must include an Intake record before a Consent record can be created.

3.3.5 In the Actions column of the Client List table, click the "Profile" or the "Activity List" link for the desired client.

3.4 Once the client record has been located, select the desired treatment episode in which consent and referral records will be created.

3.4.1 In the Navigation View, click the "Episode List" link.

3.4.2 Click the "Review" link in the Actions column of the Episode List table for the desired treatment episode.

3.4.3 Consent records do not cross episodes, so a consent record created in one episode will not include data from any other concurrent episodes.

3.5 If desired, open a reference window.

3.5.1 Consent and Referral records depend on activity dates in the client's Activity List, and having these dates easily viewable can prove helpful.

3.5.2 With the client's Activity List displayed, click the "Printable View" icon at the top of the screen.

3.5.3 A pop-up window will open, displaying the Activity List.

3.5.4 This pop-up window can be used as a point of reference while creating or otherwise working with Consent and referral records.

3.5.5 Close the pop-up window when finished.

4.0 Consent (Disclosing Client and Treatment Data)

4.1 Creating a consent record ("consenting") makes selected client treatment data viewable in a read-only format to other OWITS agencies and/or facilities.

4.1.1 Receiving agencies and/or facilities are not permitted to disclose this data to other agencies or facilities.

4.1.2 Receiving agencies and/or facilities may only disclose data generated and/or recorded in their records.

4.1.3 Receiving agencies and/or facilities that receive requests from other agencies or facilities for previously disclosed data must refer the requester to the agency from which the data originated.

4.1.4 Receiving agencies and/or facilities are permitted to use consented screenings and assessments for their treatment of the client, but they must document that the screening and/or assessment has been reviewed and found suitable for current treatment needs.

4.2 After selecting a client and a treatment episode (3.4.2), navigate to Client List > Activity List > Consent.

4.2.1 The Client Consent List screen will display.

4.2.2 This screen lists all consent records that have been created in the context episode.

4.3 To disclose data to another OWITS agency or facility, or to record that data has been disclosed to a non-OWITS organization, click the "Add New Client Consent Record" link in the Client Consent List heading.

4.3.1 The Client Disclosure Agreement screen will display.

4.3.2 Complete the following fields as appropriate:

4.3.2.1 *Entities with Disclosure Agreements*

4.3.2.1.1 If using a disclosure agreement to create this consent record, select the name of that agreement in this field.

4.3.2.1.2 The Comments field below (4.3.2.10) will automatically populate with any comments entered for the selected disclosure domain record, which will help distinguish among multiple disclosure domains.

4.3.2.2 *System Agency*

4.3.2.2.1 Indicate whether the receiving agency is an OWITS agency.

4.3.2.3 *Disclosed to Agency*

4.3.2.3.1 If "Yes" is selected in the System Agency field above (4.3.2.2), select the name of the receiving agency.

4.3.2.3.2 If an option was selected in the Entities with Disclosure Agreements field above (4.3.2.1), this field will automatically populate with the name of the agency associated with the selected disclosure domain.

4.3.2.3.3 If "No" is selected in the System Agency field above, this field will be read-only.

4.3.2.4 *Facility*

4.3.2.4.1 This field will automatically populate with "All Facilities."

4.3.2.4.2 If the disclosed information should only be made available to users in a single specific facility at the receiving agency, select the name of that facility.

4.3.2.5 *Disclosed to Entity (Non System Agency)*

4.3.2.5.1 If "No" is selected in the System Agency field above (4.3.2.2), type the name of the person or organization to whom the data will be disclosed.

4.3.2.5.2 If "Yes" is selected in the System Agency field above, this field will be read-only.

4.3.2.6 *Purpose for disclosure*

4.3.2.6.1 Enter a brief explanation of the disclosure.

4.3.2.6.2 This field does not have a character limit, but only the first 50 characters will be displayed.

4.3.2.7 *Earliest date of services to be consented*

4.3.2.7.1 This field refers to the Activity Date column on the client's Activity List (see 3.5.1).

4.3.2.7.2 Enter the earliest date of the information displayed in the Activity List that will be included in this disclosure.

4.3.2.7.3 Client data and treatment data with an Activity Date on or after the date entered into this field will be included in this disclosure.

4.3.2.7.3.1 Example: The client has had a total of three Behavioral Health Assessments conducted, one in June 2011, one in August 2012, and one in April 2013. If the earliest date of services to be consented is 10/31/2012, the first two Behavioral Health Assessments will not be included.

4.3.2.7.3.2 Example: The earliest Activity Date displayed in the client's activity list is 05/05/2009, and the entire contents of the Activity List are to be disclosed. The earliest date of services to be consented must be 05/05/2009 or earlier.

4.3.2.7.4 Because consent records do not cross episodes, it may be necessary to create additional consent records in other episodes.

4.3.2.7.5 Additional records created after the Consent record is created will be included in the disclosure if they meet the consent criteria (see 4.3.3).

4.3.2.8 *Has the client signed the paper agreement form*

4.3.2.8.1 Indicate whether the client has signed a release of information form specifying that he or she agrees to this disclosure of data.

4.3.2.8.2 If the disclosing agency does not use a specific release of information agreement form, select "Yes" in this field only if the clinician can document that the client agrees to this disclosure.

4.3.2.8.3 Data will not be disclosed until "Yes" is selected in this field.

4.3.2.9 *Date client signed consent*

4.3.2.9.1 This field will become available only after "Yes" is selected in the adjacent paper agreement field (4.3.2.8).

4.3.2.9.2 This field will automatically populate with the current date, which can be changed to reflect the date the client actually signed the agreement.

4.3.2.9.3 This date cannot be in the future.

4.3.2.9.4 Data will not be disclosed until a date is entered into this field.

4.3.2.10 *Comments*

4.3.2.10.1 If a disclosure domain was selected in the Disclosure Agreements field above (4.3.2.1), this field will automatically populate with any text entered into the Comments field for the associated Disclosure Domain record (2.3.5).

4.3.2.10.2 Enter additional text as needed for this consent record.

4.3.2.11 *Other Disclosures*

4.3.2.11.1 If applicable and necessary, enter additional notes to indicate whether the client's data has been disclosed to other agencies and/or facilities.

4.3.3 Complete the Client Information Expiration and Disclosure section.

4.3.3.1 If a disclosure domain was selected in the Disclosure Agreements field above (4.3.2.1), this section will automatically populate with selections made for the associated Disclosure Domain record (2.3.4).

4.3.3.1.1 Elements of the client's treatment record can be added from the Client Information Options section as needed (4.3.3.2).

4.3.3.1.2 Existing selection in the Disclosure Selection field can be removed as needed (4.3.3.5).

4.3.3.1.3 To modify an existing selection in the Disclosure Selection field, remove it and re-add it from the Client Information Options section.

4.3.3.2 In the Client Information Options field, select aspects of the client's treatment record that will be shared.

4.3.3.2.1 Hold down the CTRL key while clicking to select multiple options at once.

4.3.3.2.2 Hold down the SHIFT key while clicking to select a range of options at once.

4.3.3.2.3 The options available in this field are the same as those available in the agency Disclosure Domain module (2.3.4.1).

4.3.3.3 Use the Consent Expires Upon options to indicate when the shared information will no longer be available to the receiving agency or entity.

4.3.3.3.1 Select "Discharge (UD)" to indicate that the shared information will no longer be available a specified number of days after the date on which the client is discharged from treatment.

4.3.3.3.1.1 This selection will apply only to the episode in which the consent record is created (see 3.4.2).

4.3.3.3.1.2 If the episode in which the consent or referral record is created does not have a discharge record, the disclosed data will not expire.

4.3.3.3.1.3 If a client is discharged and later admitted again, the disclosed data will still expire unless it is disclosed again.

4.3.3.3.1.4 In the associated "+ Days" field, enter the number of days that must elapse after the Discharge date (see OWITS Reference Manual, Volume 9: Client Discharge) before the disclosed data element becomes unavailable to the receiving agency.

4.3.3.3.1.5 Example: To make an element of treatment data available to another agency for one year after the client concludes treatment, select the "Discharged (UD)" option and enter "365" in the first of the two "+ Days" fields.

4.3.3.3.2 Select "Date Signed (DS)" to indicate that shared information will no longer be available a specified number of days after the date on which the client agrees to a release of the selected information.

4.3.3.3.2.1 In the associated "+ Days" field, enter the number of days that must elapse after the date on which the client signed the release of information agreement (4.3.2.9) before the disclosed data element becomes unavailable to the receiving agency.

4.3.3.3.2.2 Example: To make an element of treatment data available to another agency for two years after the client agrees to share the selected data, select the "Date Signed (DS)" option and enter "730" in the second of the two "+ Days" fields.

4.3.3.3.3 Select "Other Event (OE)" to indicate that shared information will no longer be available after a specific event that occurs on a specific date.

4.3.3.3.3.1 In the associated "Exp" field, enter the date after which the disclosed data element will become unavailable to the receiving agency.

4.3.3.3.3.2 In the Description field below, enter a brief description of the event that will trigger the expiration of the data element.

4.3.3.3.3.3 Example: To make an element of treatment data available to another agency until the client's 18th birthday, select the "Other Event (OE)" option, then enter the date on which the client will turn 18 into the adjacent "Exp" field, then enter descriptive text (such as "18th Birthday") into the Description field.

4.3.3.3.4 Select "Crim Just Cond (CJC)" to indicate that shared information will no longer be available after a specific criminal justice condition is met on a specific date.

4.3.3.3.4.1 In the associated "Exp" field, enter the date after which the disclosed data element will become unavailable to the receiving agency.

4.3.3.3.4.2 In the Description field below, enter a brief description of the criminal justice condition that will trigger the expiration of the data element.

4.3.3.3.4.3 Example: To make an element of treatment data available to another agency until the client completes a DUII diversion program, select the "Crim Just Cond (CJC)" option, then enter the date on which the client's DUII diversion period will be concluded into the adjacent "Exp" field, then enter descriptive text (such as "DUII Div Complete") into the Description field.

4.3.3.3.5 Only one expiration criterion (Discharge, Date Signed, Other Event, or Criminal Justice Condition) may be selected at a time.

4.3.3.4 When the desired treatment records have been selected (4.3.3.2) and the expiration criteria have been assigned (4.3.3.3), click the right arrow to move the selections to the Disclosure Selection field.

4.3.3.4.1 Example: Selecting "Admission" and indicating that it will become unavailable 90 days after the date of discharge will create a selected option of "Admission (UD, + 90)."

4.3.3.4.2 Example: Selecting "Mental Health Assessment" and indicating that it will become unavailable 180 days after the date of discharge will create a selected option of "Mental Health Assessment (DS, +180)."

4.3.3.4.3 Example: Selecting "Behavioral Health Assessment" and indicating that it will be available until the client's 18th birthday will create a selected option of "Behavioral Health Assessment (18th Birthday, 05/18/2016)."

4.3.3.4.4 Example: Selecting "Treatment Plan" and indicating that it will be available until the client's probation period is concluded will create a selected option of "Treatment Plan (Probation End Date, 02/28/2014)."

4.3.3.5 To remove an entry from the Disclosure Selection field, select the desired option, and click the left arrow.

4.3.3.5.1 The option will be returned to the Client Information Options field.

4.3.3.5.2 The expiration criteria will be removed.

4.3.3.5.3 The removed data element can be re-selected with different expiration criteria if necessary.

4.3.4 When all required fields have been completed, click Save.

4.3.4.1 If a date was entered into the signed consent field (4.3.2.9), and if all required fields have been completed correctly, all fields will become read-only and this disclosure agreement will no longer be editable.

4.3.4.2 The Cancel and Save buttons will disappear and a Revoke button (see 4.5) will become available.

4.3.4.3 A "Create Referral Using this Disclosure Agreement" link will appear in the Client Disclosure Agreement heading.

4.3.4.3.1 This link can be used to create referral records as needed.

4.3.4.3.2 Clicking this link will open the Client Referral screen (see 5.0).

4.3.5 Click Finish.

4.3.6 The consented data is now available to the selected receiving agency and/or facility.

4.4 To review an existing consent record, click the "Review" link in the Actions column of the desired disclosure on the Client Consent List screen.

4.4.1 The Client Disclosure Agreement screen will display.

4.4.2 If the disclosure agreement has not been marked as signed (4.3.2.9), it can be modified as needed.

4.4.3 If the disclosure agreement has been marked as signed, it cannot be modified.

4.5 Existing consent records can be revoked if required by the agency or facility or if requested by the client.

4.5.1 Review an existing consent record by clicking the "Review" link in the Actions column of the desired disclosure on the Client Consent List screen.

4.5.2 The Client Disclosure Agreement screen will display.

4.5.3 Confirm that the correct disclosure agreement was selected.

4.5.4 Click the Revoke button in the lower right corner of the screen.

4.5.5 OWITS will confirm the revocation.

4.5.5.1 Click "Yes" to revoke the disclosure.

4.5.5.2 This action cannot be undone.

4.5.6 OWITS will exit to the Activity List.

4.5.7 The disclosure agreement will be marked as revoked on the Client Consent List screen and the "Create Referral" link (4.3.4.3) will no longer appear.

4.5.8 Receiving agencies and/or facilities associated with this record will no longer have access to the previously disclosed data unless or until a replacement disclosure agreement is created.

5.0 Referral (Sending and Transferring Client and Treatment Data)

5.1 Creating a referral record ("referring") is the process by which clients move from treatment at one OWITS agency or facility to treatment at another OWITS agency or facility.

5.1.1 A referral provides OWITS agencies and/or facilities with the option of accepting a client for treatment without having to create a new client profile record.

5.1.2 A referral makes selected client treatment data available to other OWITS agencies and/or facilities in a read-only format.

5.1.3 Receiving agencies and/or facilities are not permitted to disclose received data, other than the Client Profile, to other agencies or facilities.

5.1.4 Receiving agencies and/or facilities may only disclose data generated and/or recorded in their records.

5.1.5 Receiving agencies and/or facilities that receive requests from other agencies or facilities for previously disclosed data must refer the requester to the agency from which the data originated.

5.1.6 Receiving agencies and/or facilities are permitted to use consented screenings and assessments for their treatment of the client, but they must document that the screening and/or assessment has been reviewed and found suitable for current treatment needs.

5.2 After selecting a client and a treatment episode (see 3.3 and 3.4), navigate to Client List > Activity List > Referrals.

5.2.1 The Client Referral List screen will display.

5.2.2 This screen lists all referral records that have been created in the context episode.

5.3 To refer a client to another OWITS agency or facility, or to record that the client has been referred to a non-OWITS organization, lick the "Add New Client Referral Record" link in the Client Referral List heading.

5.3.1 The Client Referral screen will display.

5.3.1.1 Referrals can also be created using the "Create Referral Using this Disclosure Agreement" link that appears on a completed Client Consent record (4.3.4.3).

5.3.2 The Client Referral screen consists of the following fields in the "Referred By" section:

5.3.2.1 *Agency*

5.3.2.1.1 This read-only field will automatically populate with the name of the context agency, which is the agency from which the referral will be generated.

5.3.2.2 *Facility*

5.3.2.2.1 This read-only field will automatically populate with the name of the context facility, which is the facility from which the referral will be generated.

5.3.2.3 *Staff Member*

5.3.2.3.1 This read-only field will automatically populate with the name of the staff member adding the referral record.

5.3.2.4 *Program*

5.3.2.4.1 If applicable, select the program from which the client is being referred.

5.3.2.4.2 This field is required if the client will continue to receive treatment in the current agency and facility while also receiving treatment or services from the entity receiving the referral.

5.3.2.5 *State Reporting Category*

5.3.2.5.1 This read-only field has not been configured for a specific use in OWITS.

5.3.2.6 *Reason*

5.3.2.6.1 Select the option that best describes why the client is being referred to another agency, facility, or non-OWITS organization or individual.

5.3.2.6.2 Select “Other” if none of the options fit the reason for the referral.

5.3.2.7 *If Other*

5.3.2.7.1 Enter any additional details to explain the referral, especially if “Other” is selected in the Reason field above (5.3.2.5.1).

5.3.2.8 *Is Consent Verification Required?*

5.3.2.8.1 This field has not been configured for a specific use in OWITS.

5.3.2.8.2 To avoid potential difficulties, select “Yes.”

5.3.2.9 *Is Consent Verified?*

5.3.2.9.1 This field has not been configured for a specific use in OWITS.

5.3.2.9.2 To avoid potential difficulties, select “Yes.”

5.3.2.10 *Continue This Episode of Care?*

5.3.2.10.1 Select “Yes” to indicate that the client will continue to receive treatment or services as part of the current episode.

5.3.2.10.2 Selecting “Yes” in this field will make the Program field above (5.3.2.4) required.

5.3.2.10.3 Select “No” to indicate that the client has concluded the current episode of treatment or will conclude the current episode of treatment shortly after this referral is completed.

5.3.2.10.4 No business rules are in place for this field, so its function is only for record-keeping purposes.

5.3.3 The Client Referral screen consists of the following fields in the “Referred To” section:

5.3.3.1 *Signed Consents*

5.3.3.1.1 This field will automatically populate with the names of agencies or entities to which client data has already been consented.

5.3.3.1.1.1 If the desired consent record is not available in this field, return to the Consent module and verify that the "paper agreement form" (4.3.2.8) and "date signed" (4.3.2.9) fields are complete.

5.3.3.1.2 Select a consent record that will be associated with this referral.

5.3.3.1.2.1 Selecting a consent record makes "Continue this Episode of Care" change to "No," but it can be changed back if necessary.

5.3.3.2 *Agency*

5.3.3.2.1 This field will automatically populate with the name of the agency associated with the selected Signed Consent (5.3.3.1).

5.3.3.2.2 If no Signed Consent was selected, this field will automatically populate with "Non System Agency."

5.3.3.3 *Facility*

5.3.3.3.1 If required, select the facility to which the client will be referred.

5.3.3.4 *Staff Member*

5.3.3.4.1 If the client is being referred to see a specific staff member, select his or her name in this field.

5.3.3.5 *Program*

5.3.3.5.1 If required, select the program that best fits the expected needs of the client.

5.3.3.5.2 This does not require the receiving agency to place the client in the selected program.

5.3.3.6 *State Reporting Category*

5.3.3.6.1 This field is not required and is not currently configured for use in Oregon.

5.3.3.7 *Non-System Agency*

5.3.3.7.1 If "Non System Agency" is selected above (5.3.3.2), this field will automatically populate with the name of the non-system agency indicated in the associated Consent record (5.3.3.1).

5.3.3.8 *Non-System Modality*

5.3.3.8.1 This field will only be editable if "Non System Agency" is selected above (5.3.3.2).

5.3.3.8.2 Select the modality that best describes the treatment or services the client is expected to be given at the receiving agency.

5.3.3.9 *Non-System Specifier*

5.3.3.9.1 This field will only be editable if "Non System Agency" is selected above.

5.3.3.9.2 Select the modality that best describes the receiving agency.

5.3.3.10 *Appt Date*

5.3.3.10.1 If the client has a scheduled appointment at the receiving agency, enter the appointment date in the first of these two fields.

5.3.3.10.2 If the receiving agency has accepted the referral and changed the client's appointment status, changes will appear in the second of these two fields.

5.3.3.10.3 If the receiving agency is a non-system agency, this will become an editable drop-down menu where an appointment status can be recorded and updated as needed.

5.3.3.11 *Consents Granted*

5.3.3.11.1 This section will automatically populate with selections made for the associated Consent record (see 4.3.3).

5.3.4 The Client Referral screen also includes the following fields:

5.3.4.1 *Comments*

5.3.4.1.1 Enter any additional relevant information for this referral.

5.3.4.2 *Referral Status*

5.3.4.2.1 This field will automatically populate with "Referral Created/Pending."

5.3.4.2.2 Change the value in this field only if referring to a non-system agency and noting whether the referral has been accepted or rejected.

5.3.4.3 *Referral Date*

5.3.4.3.1 Enter the date on which the client was or will be referred to the receiving agency.

5.3.4.3.2 This date can be in the future.

5.3.4.4 *Projected End Date*

5.3.4.4.1 If desired, enter a date on which the client is expected to conclude treatment at the receiving facility.

5.3.4.4.2 This date should be in the future.

5.3.4.5 *Created Date*

5.3.4.5.1 This read-only field will automatically populate with the date and time at which this referral record was first created.

5.3.5 Click Finish to return to the Client Referral List screen.

5.4 To view or modify existing referral records, click the "Review" link in the Actions column of the desired referral on the Client Referral List screen.

5.4.1 The Client Referral screen will display.

5.4.2 Modify existing fields as needed.

5.4.3 Click Finish to return to the Client Referral List screen.

5.5 To delete an existing referral record, click the "Delete" link in the Actions column of the desired referral on the Client Referral List screen.

5.5.1 If the referral has not been accepted, OWITS will confirm the delete command.

5.5.1.1 Click "Yes" to delete the referral record.

5.5.1.2 This action cannot be undone.

5.5.2 If the referral has been accepted, the referral record cannot be deleted.

6.0 Viewing Consented Data

6.1 Client data disclosed from OWITS agency or facility to another appears in a read-only format that can be accessed from the Client Search screen.

6.1.1 Navigate to Client List.

6.1.2 On the Client Search screen, enter search criteria appropriate to locate clients whose treatment data has been disclosed to the context agency and/or facility.

6.1.2.1 It may be necessary to set the "Facility" field to the null (blank) value.

6.1.2.2 It may be necessary to set the "Include Only Active Consents" field to "No" or to the null (blank) value.

6.1.3 Click Go.

6.2 The names of clients whose records have been disclosed will appear in the lower section of the Client Search screen under the "Clients with Consents from Outside Agencies" heading.

6.2.1 Only users who have the Role Attribute of "View Consented Clients" will be able to see this table or view disclosed client data.

6.3 To view the disclosed records, click the "Activity List" link in the Actions column of the desired client.

6.3.1 The disclosed records will display (for HIPAA compliance, see Appendix B – Disclosure and Referral Restrictions).

6.3.2 To view details, click the "Review" link in the Actions column for the desired record.

6.3.2.1 The report will appear in a pop-up window.

6.3.2.1.1 The report may be viewed or printed.

6.3.2.1.1.1 Some reports may be saved as a PDF.

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

6.3.2.1.2 Close the pop-up window when finished.

6.3.3 When finished, click the "Return to Consented Activity List" link.

7.0 Handling Incoming Referrals

7.1 Agencies and facilities may receive referrals from other agencies and facilities.

7.1.1 Referral notifications appear on the Home Page.

7.1.2 For example, an informational message may appear, stating "There are currently 5 people that have been referred in."

7.2 Viewing, accepting, or rejecting referrals is handled at the agency level.

7.3 Navigate to Agency > Agency List > Referrals > Referrals In.

7.3.1 The “Referrals For” screen will appear, noting the context agency.

7.4 Search for the desired incoming referral.

7.4.1 Search fields include the following:

7.4.1.1 *Referral Status Codes*

7.4.1.1.1 Select the desired referral status descriptions and move them over to the adjacent Search Criteria box.

7.4.1.2 *Client ID*

7.4.1.2.1 Enter the OWITS Client ID number of the desired client.

7.4.1.2.2 Wildcards can be used in this field.

7.4.1.3 *Created Date*

7.4.1.3.1 Enter the date on which the referral record was created by the referring agency (5.3.4.5).

7.4.1.4 *Referred Date*

7.4.1.4.1 Enter the date the referral was made by the referring agency (5.3.4.3).

7.4.1.5 *First Name*

7.4.1.5.1 Enter the first name of the desired client.

7.4.1.5.2 Wildcards can be used in this field.

7.4.1.6 *Last Name*

7.4.1.6.1 Enter the last name of the desired client.

7.4.1.6.2 Wildcards can be used in this field.

7.4.2 Click Go.

7.4.2.1 The search results will display.

7.4.2.2 Leaving the search fields blank will not filter out any search results.

7.5 Click the “Review” link in the Actions column for the desired referral record.

7.5.1 The Client Referral screen will display.

7.5.2 This screen will automatically populate with the data entered by the referring agency (see 5.3.1).

7.5.3 The following fields will be available for editing:

7.5.3.1 *Referral Status*

7.5.3.1.1 If desired, select a new status for this referral.

7.5.3.1.2 To accept the client’s record and to begin treatment for the client, select “Placed / Accepted.”

7.5.3.1.2.1 This accepts the client’s records and begins collecting data for treatment (see 7.6).

7.5.3.1.3 To reject the client or the referral record or to indicate that the client declined treatment, select “Referred Terminated,” “Refused Treatment,” or “Rejected by Program” as appropriate.

7.5.3.1.4 To indicate that the client has been accepted (even conditionally or temporarily) but has not yet begun receiving treatment or services, select "Wait List."

7.5.3.1.4.1 This only indicates that the client is waiting to receive treatment or services; it does not put the client's name on an OWITS waiting list.

7.5.3.2 *Projected End Date*

7.5.3.2.1 If desired, enter a date on which the client is expected to conclude treatment.

7.5.3.2.2 This date should be in the future.

7.5.3.3 *Appt Date*

7.5.3.3.1 If the client has a scheduled appointment, enter the appointment date in the first of these two fields.

7.5.3.3.2 Change the selection in the second of these two fields as appropriate to indicate whether the status of the client's appointment.

7.5.4 Click Finish.

7.5.4.1 OWITS will perform a duplicate client check.

7.5.4.2 If a client profile is found with a matching Unique Client ID number, the referral will be connected to the existing client.

7.5.4.3 If a potential duplicate client is found, OWITS will ask whether it should create a duplicate client record or not.

7.5.4.3.1 Clicking Yes will create a second profile, which may be a duplication of an existing client.

7.5.4.3.2 Clicking No will not create a new profile but will also not accept the incoming referral.

7.5.4.3.3 Duplicate criteria include First Name, Last Name, Date of Birth, and Social Security Number.

7.5.4.4 If a client profile exists for the incoming referral but does not exactly match, use the Linked Consent screen to connect the two client records.

7.5.4.4.1 Click No when OWITS asks whether it should create a profile for the potentially duplicate client.

7.5.4.4.2 Navigate to the Client List screen (Client Search).

7.5.4.4.3 Perform a search so that the incoming referral client's name appears in the Clients With Consents From Outside Agencies table.

7.5.4.4.4 In the Actions column, click the "Link" link.

7.5.4.4.5 The Link Client Search screen will display.

7.5.4.4.6 Use the search fields to find the profile of the existing client that matches the selected incoming referral.

7.5.4.4.7 In the Actions column of the matching client, click the "Link" link.

7.5.4.4.8 OWITS will confirm the linking command.

7.5.4.4.8.1 Confirm that the clients' names are correct.

7.5.4.4.8.2 Click Yes to link the incoming referral to the existing client.

7.5.4.4.8.3 Click No to cancel the linking process.

7.5.4.4.9 Once the existing client has been linked to the incoming referral, repeat 7.3 through 7.5.4 to accept the referral as normal.

7.6 Collect data to begin treatment for accepted referrals.

7.6.1 If "Placed / Accepted" was selected on the Client Referral screen (7.5.3.1), the Client Profile screen will appear after clicking Finish.

7.6.2 Review the Client Profile data and edit it as needed (see OWITS Reference Manual, Volume 4: Client Profile).

7.6.3 Click Finish to exit to the Client Search screen.

7.6.4 Record treatment data (Intake, Admission, Program Enrollment, etc.) as appropriate (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

7.7 The Referrals In table can be exported for use or reference outside OWITS.

7.7.1 In the blue Referrals For header, click the Export link while holding the CTRL key.

7.7.2 The screen will reload and a pop-up browser window will appear.

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

7.7.3 A dialogue box will appear prompting to open, save, or cancel the document export process.

7.7.3.1 Click Open to view the exported data in the pop-up browser window in a format similar to a Microsoft Excel spreadsheet.

7.7.3.2 Click Save to save the file to the local computer as a Microsoft Excel spreadsheet.

7.7.3.3 Click Cancel to stop the export process.

7.7.4 Release the CTRL key.

7.7.5 When finished, close the pop-up window if it has not already closed itself.

8.0 Reviewing Outgoing Referrals

8.1 Agencies and facilities may referrals sent to agencies and facilities.

8.2 Viewing sent referrals can be handled at the agency level or within an individual client's profile (see 5.4).

8.3 Navigate to Agency > Agency List > Referrals > Referrals Out.

8.3.1 The "Referrals From" screen will appear, noting the context agency.

8.4 Search for the desired incoming referral.

8.4.1 Search fields include the following:

8.4.1.1 *Referral Status Codes*

8.4.1.1.1 Select the desired referral status descriptions and move them over to the adjacent Search Criteria box.

8.4.1.2 *Client ID*

8.4.1.2.1 Enter the OWITS Client ID number of the desired client.

8.4.1.2.2 Wildcards can be used in this field.

8.4.1.3 *Created Date*

8.4.1.3.1 Enter the date on which the referral record was created (5.3.4.5).

8.4.1.4 *Referred Date*

8.4.1.4.1 Enter the date the referral was made (5.3.4.3).

8.4.1.5 *First Name*

8.4.1.5.1 Enter the first name of the desired client.

8.4.1.5.2 Wildcards can be used in this field.

8.4.1.6 *Last Name*

8.4.1.6.1 Enter the last name of the desired client.

8.4.1.6.2 Wildcards can be used in this field.

8.4.2 Click Go.

8.4.2.1 The search results will display.

8.4.2.2 Leaving the search fields blank will not filter out any search results.

8.5 The Referrals Out table can be exported for use or reference outside OWITS.

8.5.1 In the blue Referrals From header, click the Export link while holding the CTRL key.

8.5.2 The screen will reload and a pop-up browser window will appear.

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

8.5.3 A dialogue box will appear prompting to open, save, or cancel the document export process.

8.5.3.1 Click Open to view the exported data in the pop-up browser window in a format similar to a Microsoft Excel spreadsheet.

8.5.3.2 Click Save to save the file to the local computer as a Microsoft Excel spreadsheet.

8.5.3.3 Click Cancel to stop the export process.

8.5.4 Release the CTRL key.

8.5.5 When finished, close the pop-up window if it has not already closed itself.

8.6 Click the "Review" link in the Actions column for the desired referral record.

8.6.1 The Client Referral screen will display as it would appear in the client's Activity List.

8.6.2 Most fields will be available for editing as if the screen was accessed from the client's Activity List (see 5.4), including:

8.6.2.1 *Referral Status*

8.6.2.1.1 If desired, select a new status for this referral.

8.6.2.1.2 To show that the client's record has been received by the receiving agency or facility and that treatment has begun, select "Placed / Accepted."

8.6.2.1.2.1 The receiving agency should take this step, but the referring agency or facility can mark a referral as accepted for a non-system agency.

8.6.2.1.3 To show that the client was rejected by the receiving agency or facility or to indicate that the client declined treatment, select "Referred Terminated," "Refused Treatment," or "Rejected by Program" as appropriate.

8.6.2.1.4 To indicate that the client has been accepted (even conditionally or temporarily) but has not yet begun receiving treatment or services, select "Wait List."

8.6.2.1.4.1 This only indicates that the client is waiting to receive treatment or services; it does not put the client's name on an OWITS waiting list.

8.6.2.2 *Projected End Date*

8.6.2.2.1 If desired, enter a date on which the client is expected to conclude treatment.

8.6.2.2.2 This date should be in the future.

8.6.2.3 *Appt Date*

8.6.2.3.1 If the client has a scheduled appointment, enter the appointment date in the first of these two fields.

8.6.2.3.2 Change the selection in the second of these two fields as appropriate to indicate whether the status of the client's appointment.

8.6.3 Click Finish to save changes and exit the screen.

9.0 Reviewing Disclosed Data for Accepted Referrals

9.1 After accepting a referred client (7.5.3.1.2), the client's name will disappear from the "Clients With Consents from Outside Agencies" table on the Client Search screen (6.2).

9.1.1 Some of the data disclosed in the client's consent record will be incorporated into new agency data.

9.1.2 The other disclosed data is still viewable.

9.2 New client treatment data can be added as needed to the client's Activity List (see OWITS Reference Manual, Volume 5: Client Activity and Contact).

9.3 Disclosed data can be reviewed in the Linked Consents module.

9.3.1 Navigate to Client List.

9.3.2 On the Client Search screen, enter search criteria appropriate to locate clients whose treatment data has been disclosed to the context agency and/or facility.

9.3.2.1 It may be necessary to set the "Facility" field to the null (blank) value.

9.3.3 Click Go.

9.3.4 Click the "Linked Consents" link in the Actions column of the desired client.

9.3.5 The Linked Client Consents in Other Agencies screen will display.

9.3.5.1 The client's disclosure records will display in the Linked Consent List table.

9.3.5.2 The Linked Consent screen's other functions are being evaluated for potential modifications to meet the needs of OWITS users.

9.3.6 Click the "Consented Activity List" in the Actions column for the desired consent records.

9.3.7 The disclosed records will display (for HIPAA compliance, see Appendix B – Disclosure and Referral Restrictions).

9.3.8 To view details, click the "Review" link in the Actions column for the desired record.

9.3.8.1 The report will appear in a pop-up window.

9.3.8.1.1 The report may be viewed or printed.

9.3.8.1.1.1 Some reports may be saved as a PDF.

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

9.3.8.1.2 Close the pop-up window when finished.

9.3.9 When finished, click the "Return to Consented Activity List" link.

9.3.10 Click Finish to exit to the Client Search screen.

Appendix A – Data Elements Available for Disclosure

Data Elements Available for Disclosure and Associated Client Activity

Consent Option	Associated Client Activity
Admission	Client List > Activity List > Admission
Behavioral Health Assessment	Client List > Activity List > Assessments > BHA
CAGE-AID Screening	Client List > Activity List > Screening > CAGE-AID
Client Eligibility	Client List > Activity List > Client Eligibility
Client Information (Profile)	Client List > Client Profile (Includes Other Numbers and Collateral Contacts.)
Client Screening	Client List > Activity List > Screening > BH/BI
Consent	Client List > Activity List > Consent (Includes Consent records made to other agencies or non-OWITS entities.)
DENS ASI Assessment	Client List > Activity List > Assessments > DENS ASI
DENS ASI Lite	Client List > Activity List > Assessments > ASI Lite
Discharge	Client List > Activity List > Discharge
Drug Test Results	Client List > Activity List > Drug Testing
Encounter Detail	Client List > Activity List > Encounters (Individual Encounter Notes can be disclosed or withheld.)
Follow Up	(For ATR agencies.)
GPRA Assessment	(For ATR agencies.)
GPRA Interview	(For ATR agencies.)
Immunization	Client List > Activity List > Immunization
Intake Transaction	Client List > Activity List > Intake
Medication Summary	Client List > Activity List > Treatment > Medications
Mental Health Assessment	Client List > Activity List > Assessments > Mental Health
Miscellaneous Note Detail	Client List > Activity List > Notes > Misc. Notes (Individual Miscellaneous Notes can be disclosed or withheld.)
RSS Questionnaire	Client List > Activity List > Assessments > RSS – Adult
SOGS	Client List > Activity List > Assessments > SOGS
TAP Assessment	Client List > Activity List > Assessments > TAP
Treatment Plan	Client List > Activity List > Treatment > TX Plan
Treatment Review	Client List > Activity List > Treatment > TX Review
Vital Signs	Client List > Activity List > Vital Signs

Appendix B – Disclosure and Referral Restrictions

Agencies and/or facilities receiving disclosed or referred client data from another OWITS agency or facility will see the following text:

> PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT
>
> This notice accompanies a disclosure of information concerning a client in alcohol/drug abuse treatment, made to you with the consent of such client. This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.

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.
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