Pennsylvania
Department of Drug and Alcohol Programs

PA WITS

SOR IV Grant GPRA User Guide

Applies to:

WITS Version 25.0+

PA DDAP

Updated March 2025

PA DDAP

SOR IV Grant - GPRA

Preface

SOR IV grants have been awarded to increase access to and to improve the quality of community mental and substance use disorder (SUD) treatment services through the expansion of Certified Community Behavioral Health Clinics (CCBHC).

Intended Audience

This SOR IV user guide has been prepared for Single County Authorities (SCAs) and provider agency staff members delivering SOR IV services to individuals. Information included will assist providers in understanding the standard WITS SOR IV system and the data entry requirements for the SOR IV grant.

Note: Screen captures, and other information included in this Standard SOR IV user guide may differ based on the settings established for your Training and/or Production site(s).

System Requirements

WITS is a web-based application accessed through an Internet (web) browser using an Internet connection.

Internet Browsers

WITS is compatible with up-to-date versions of most modern Internet browsers such as:

- Apple® Safari®
- Google Chrome™
- Mozilla® Firefox®
- Microsoft Edge

Note: Do not allow your Internet browser to save your password, as this information will be routinely updated. **Remove any previously saved WITS Password** if your browser settings automatically saved it. Failing to do so may cause the browser to substitute the new one with the older saved password when resetting PA-WITS account credentials.

Pop-up Blocker

Certain features in WITS, such as Snapshot and Scheduler, will open in a separate browser window when selected. Make sure your browser allows pop-ups from WITS.

Customer Resources

PA WITS Training Material Website: Contains links to user guides and other useful system information.

https://www.ddap.pa.gov/Training/Pages/DataSystem_Training.aspx

PA WITS Support Structure: Overview of the PA WITS problem reporting structure that describes the proper procedures to report various types of user issues.

PA WITS Help Desk: Email: RA-DAPAWITS@pa.gov
Phone: 717 736-7459 (M-F 8:00 am–4:00 pm)

PA WITS Production Site: https://pa.witsweb.org

PA WITS Support Structure

This section describes the various levels of support available to users, and the types of issues each level is responsible for addressing.

Tier 1 Support: PA WITS Agency/Staff Administrator at SCA or Provider

- Champion PA WITS at your organization
- Create new staff accounts, reset passwords, lock/unlock accounts, change user account permissions
- Have a solid understanding of WITS screens, business rules, and processes; be able to help users with any usability issue that is covered in PA-WITS training manuals or other available user and system documentation
- Address user issues during normal operation hours
- Ensure users review and complete the on-demand self-service training at: (https://www.ddap.pa.gov/Training/Pages/DataSystem_Training.aspx). **Please note:** While the steps in these videos are still accurate for PA WITS functionality-wise, the appearance of the screens will be different due to a user interface update.
- Escalate system errors or complex issues to **PA WITS Service Desk** (Tier 2 Support)

Tier 2 Support: DDAP, PA WITS Service Desk

- Available Monday-Friday, 8 AM – 4:00 PM (except on State Holidays) to answer calls or emails from the SCA or Provider's Tier 1 support designee.
- Email: RA-DAPAWITS@pa.gov
- Phone: 717-736-7459
- Work with the WITS Staff Administrator at the SCA or Provider agency to see the issue through to resolution. If the problem cannot be resolved, DDAP will escalate the issue to Tier 3 support.

Tier 3 Support: FEi Systems

- The **PA WITS Service Desk** will work with the vendor, Fei Systems, to address issues not resolved at the Tier 1 or 2 levels, and to address other system defects or availability issues.

Contents

Note: Notes contain information for users to take note of, as the information may affect what the user does with the system.

Tip: Tips contain information helpful to the user, such as providing an easier way to do something.

Important: Typically, these highlight details for the user to consider or review before continuing with a step or action within the system. This information may warn the user about possible error messages that may occur if the instructions are not followed, or it may indicate/remind users of additional actions to take before proceeding, such as downloading required software.

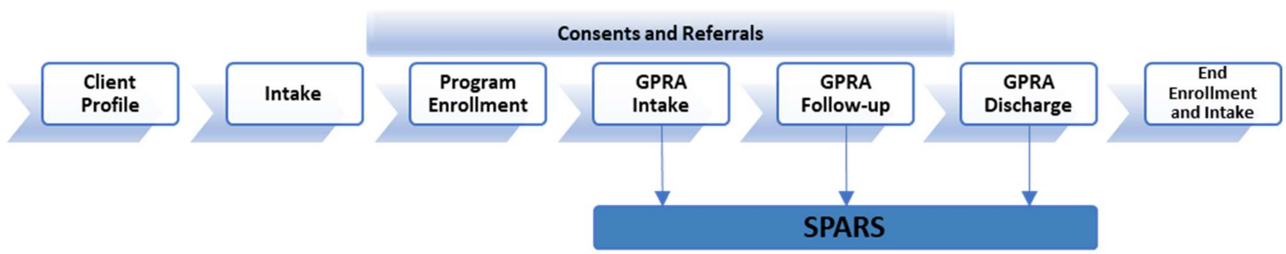
Part 1: WITS Information

WITS allows providers to easily enter information for individuals and services they receive as part of the SOR IV program.

- The initial provider agency that works with an individual will create the client profile, intake, and enroll the client into a SOR IV program.
- If the provider agency needs to refer an individual to another provider for services, WITS has an automated consent/referral process that is HIPAA/42 CFR Part 2 compliant. Once the referred-to service provider accepts the referral, WITS will automatically set up the client profile, intake and SOR IV program enrollment.
- SAMHSA has OMB certification for the GPRA, so that the initial agency can enter GPRAs, or the referred-to agency can enter the GPRAs. WITS will ensure that there are no duplicate GPRAs created for individuals enrolled in the SOR IV program.

Workflow Diagram

The following diagram illustrates the standard SOR IV workflow process.



Grant Episode Concepts

Where:* *Agency* > *Agency List* > *Facility List* > *Programs

Background

When a client's GPRA interviews are completed, they are sent to SPARS. Each type of GPRA Interview (Intake, 6-Month follow up, Discharge) is sent automatically as an upload from WITS.

Grant Episode Concepts

Event	Information
GPRA Menu Item	When a client is enrolled in a SOR program, users with a GPRA (Full Access) role will be able to access the GPRA menu at the navigation panel.
Grant Episode	This allows the client to be referred to other agencies and have the same grant episode. If Agency A completes the GPRA Intake and then refers the client to Agency B, Agency B will be able to continue the grant episode and complete the GPRA 6-Month Follow Up and GPRA Discharge interviews for the same client. This will prevent another agency from inadvertently inactivating the previous GPRA Intake because the grant episode will remain assigned to this client in other agencies. 1. The Grant Episode is created and put into a 'Pending' status when a client is enrolled in a SOR program. 2. The Grant Episode follows the client's UCN throughout the process of creating GPRAs. 3. The 'Pending' grant episode will become 'Active' once the GPRA Intake interview is completed. 4. It will remain active through the 6-Month Follow-Up and Discharge interviews. 5. Once all 3 interviews are completed, the Grant Episode will have a status of 'Closed.' 6. Once the Grant Episode is 'Closed', a new 'Pending' Grant Episode can then be created if the client needs treatment again. 7. The WITS Administrator could change Grant Episode from 'Active' to 'Inactive' (this can be done upon creation of a client program enrollment within a different agency)

Use Case: Client with GPRA intake at one provider goes to another provider <u>without</u> a WITS consent/referral

1. If the client goes to another provider who attempts to add a Client Program Enrollment in SOR IV and that client/UCN already has an 'active' grant episode, the system will prohibit this.

   The provider/user will be presented with a WITS error message:

There is a problem creating this client program enrollment record. Please contact your SCA administrator to resolve this conflict.

2. The PA Helpdesk would be able to determine the agency where the client has an active GPRA episode. (The user at the SCA or Provider who has access to the SSRS SOR GPRA Status Report would also be able to obtain this information.)

Part 2: Client Setup

Search for a Client

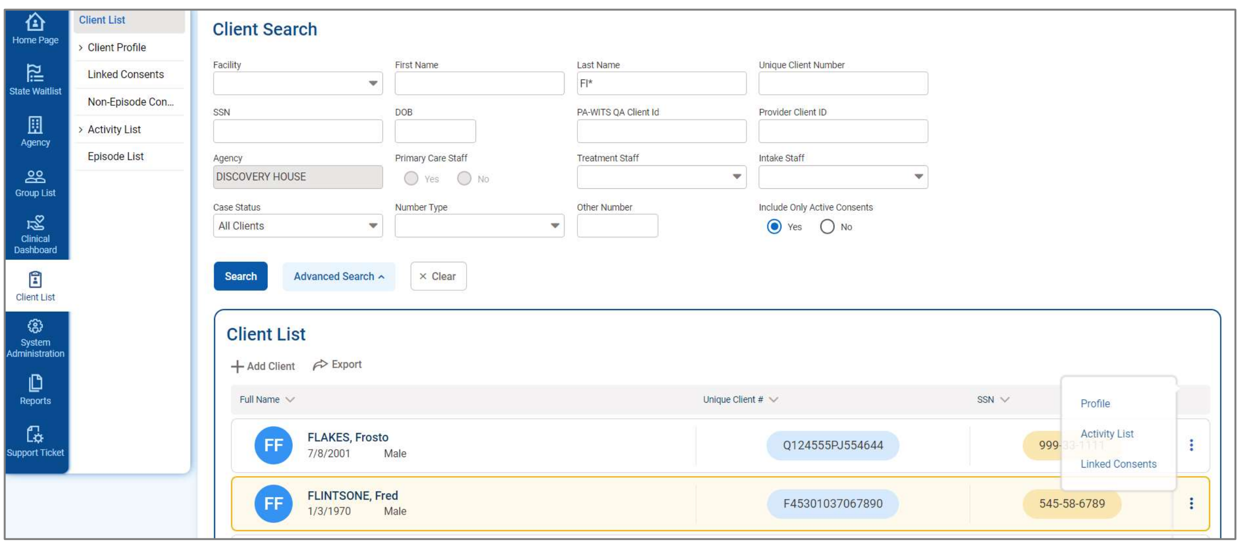
***Where:* Client List**

Before creating a new client record, search for your client to make sure the client is not already in WITS.

1. To view clients within your agency, click on the **Client List** menu item. A blank Client List screen will appear.
2. Use the fields in the **Client Search** or **Advanced Search** section to narrow your results.

Tip: When searching for a client, try to use unique information, such as birthdates or social security numbers, if possible. You can also enter a partial name (or another field) followed by an asterisk "*". This is called a **wild card search**. For instance, if you search for Last Name of "Smit*", the search results will display people with the last name of "Smith", "Smitty", "Smithson", etc.

3. After selecting from the search fields, click **Search** to view the results.



4. Look for your client in the **Client List**. If you find the right person, hover over the ellipsis (three vertical dots) and click the **Profile** link. If your client is not displayed in the Client List, you can create a new client record.

Client Search Tips

Client Names

Use a client's nickname or alternate names in the **First Name** or **Last Name** fields. Use an **asterisk** (*) to perform a wildcard search.

- Find clients whose last name starts with "Jon": **Jon***

Client Social Security Numbers

- Search by the last 4 digits of a client's SSN: ***1123**

Client Birthday or Age

- Search within a timeframe by separating the two dates with a **colon** (**:**). Search for clients born after a certain date with a **greater than sign** (**>**). Search for clients born before a certain date with a **less than sign** (**<**).

- Find clients born after a certain date: >12/30/1959

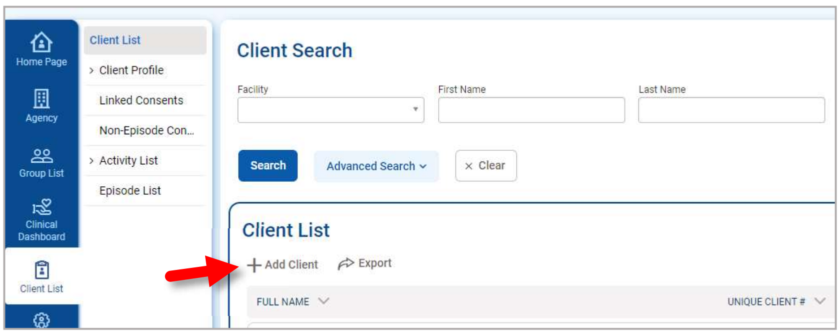
Create Client Profile

Where:* Client List > *Client Profile

Note: Please search for each client before creating a new record. See “Search for a Client” for more information.

To add a new client to the system, follow the steps below.

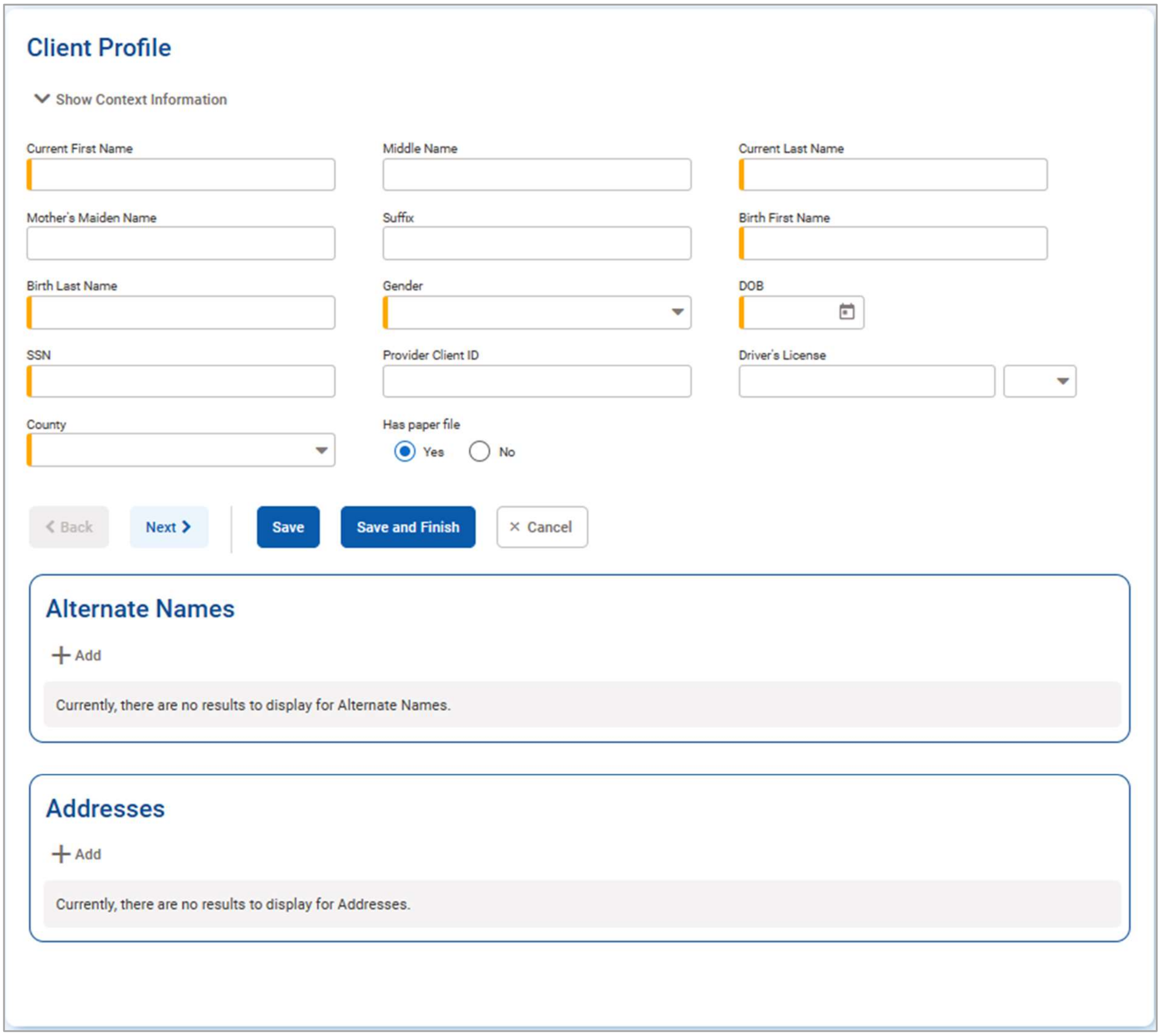
1. On the left menu, click **Client List**.
2. On the Client List screen, click **Add Client**.



3. On the **Client Profile** screen, enter the required client information. See the table below for information on each field.

Important: When adding new clients to the system, review the Client Profile fields for accuracy before saving the screen. Once the Client Profile screen is saved, a Unique Client Number (UCN) is created based on the data provided. It is important to enter client information correctly to avoid duplicate client entry in the future.

Field	Description
Current First Name	Type the client’s current first name.
Middle Name	(Optional)
Current Last Name	Type the client’s current last name.
Mother's Maiden Name	(Optional)
Birth First Name	Type the client’s first name at birth.
Birth Last Name	Type the client’s last name at birth.
Gender	Select the client’s gender from the drop-down list.
DOB	Enter the client’s date of birth.
SSN	Type the client’s Social Security Number. If the SSN is unknown, enter all zeroes (000000000).
Driver's License and State	(Optional) Type the number and then select the State from the drop-down list.
County	Select the client’s county of residence from the drop-down list.
Provider Client ID	(Optional)
Has paper file	(Optional) Select Yes or No. Field defaults to Yes.



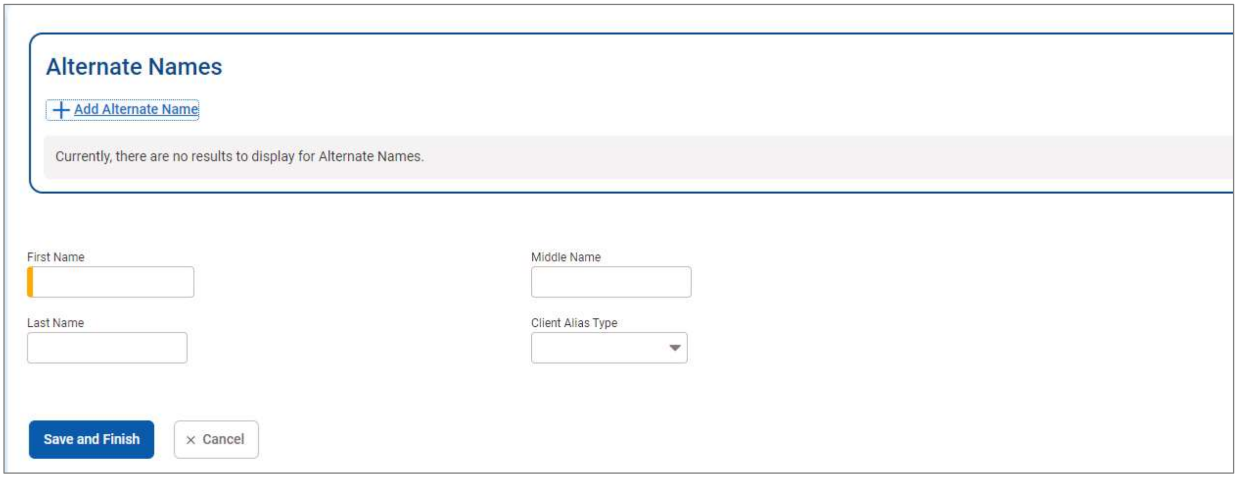
4. Click **Save**.
5. Click the **Next button** to move to the **Alternate Names** screen.

Alternate Names

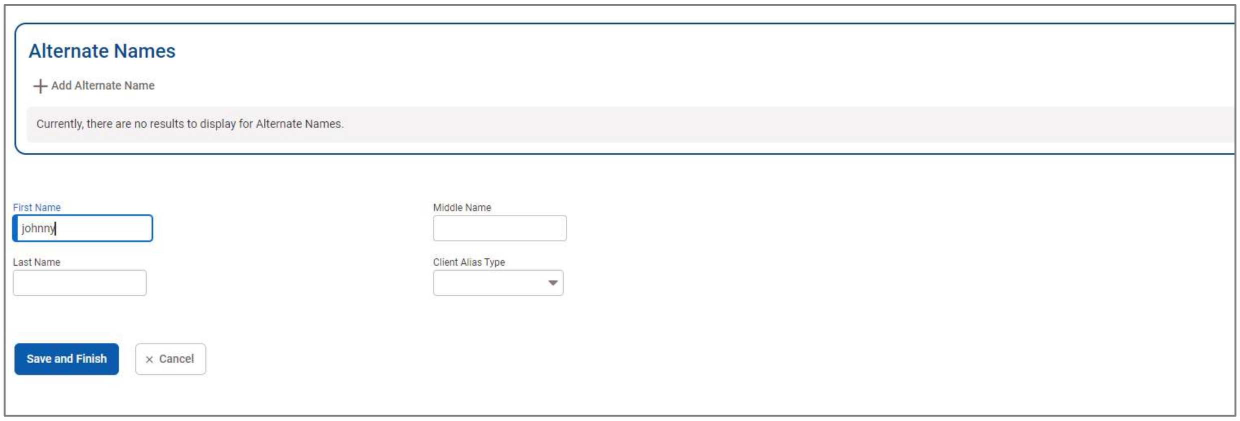
The client's nickname or street name may be entered on this screen.

> **Tip**: Alternative names can also be used to search for the client's profile in the future. On the Client Search screen, type the client's alternative name in the First Name and/or Last Name fields.

1. On the Alternate Names screen, click **Add Alternate Name**, and the fields become editable.



2. Complete at least the **First Name** field.

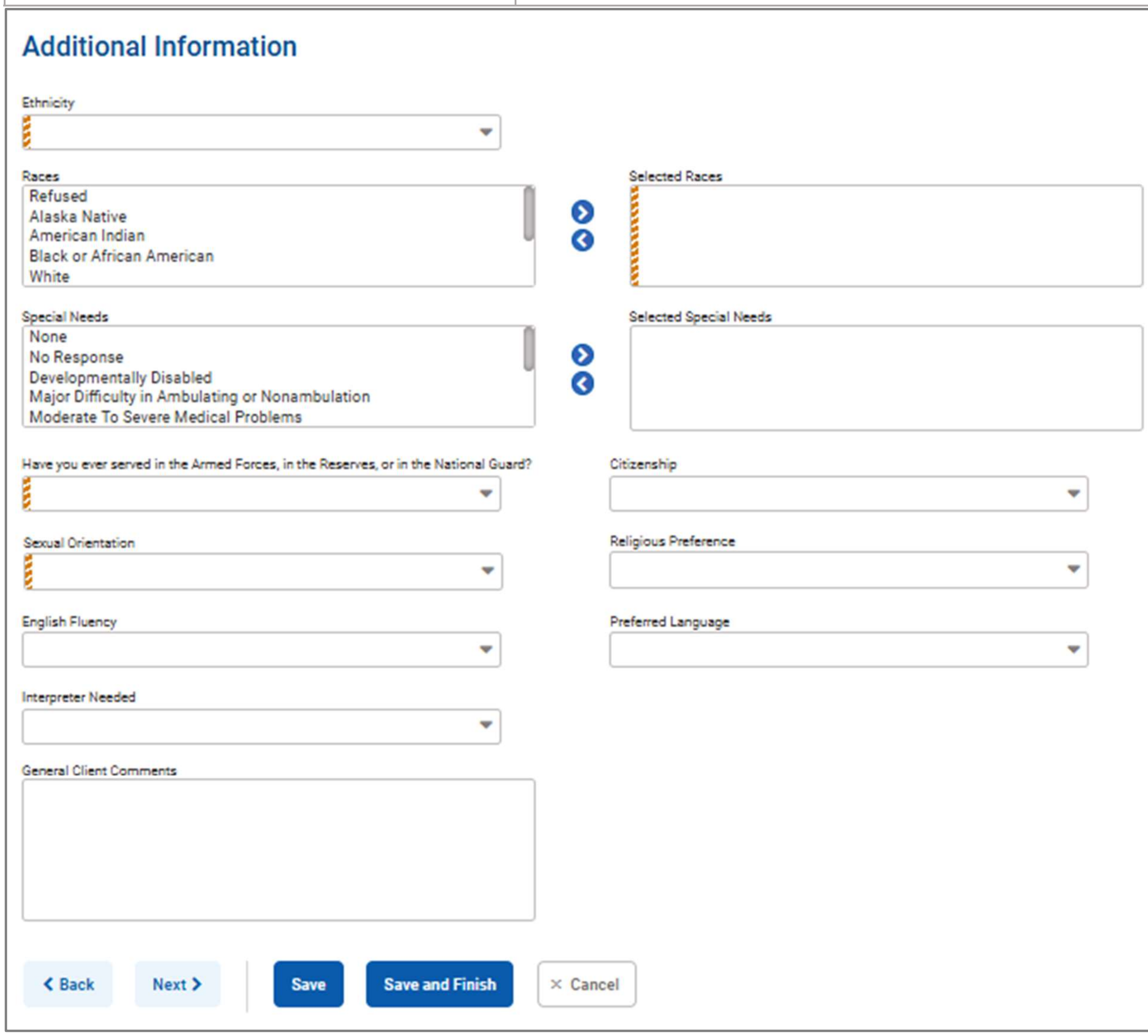


3. Click **Save and Finish**. The name will now appear in the list at the top of the screen.
4. From the Alternate Names screen, click the **Next** button to open the **Additional Information** screen.

Additional Information

1. On the **Additional Information** screen, the gold-bordered fields are required.

Field	Description
Ethnicity	Select from the drop-down list.
Selected Races	Select one or more races. **Note**: the option "Refused" cannot be combined with another option.
Have you ever served in the Armed Forces, in the Reserves, or in the National Guard?	Select from the drop-down list.



Tip: In the Races field, the option "Refused" cannot be combined with another option. If users attempt to combine other race options with "Refused", an error message will be displayed.

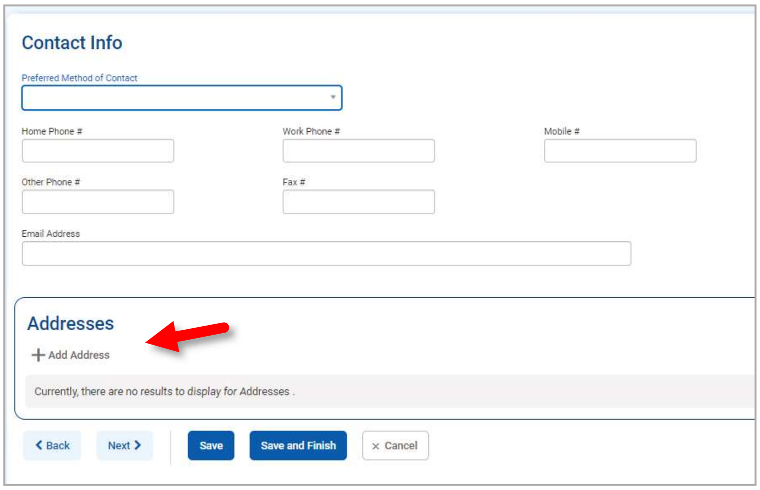
2. When complete, click **Save**, then click the **Next** button to open the **Contact Info** screen.

Contact Info

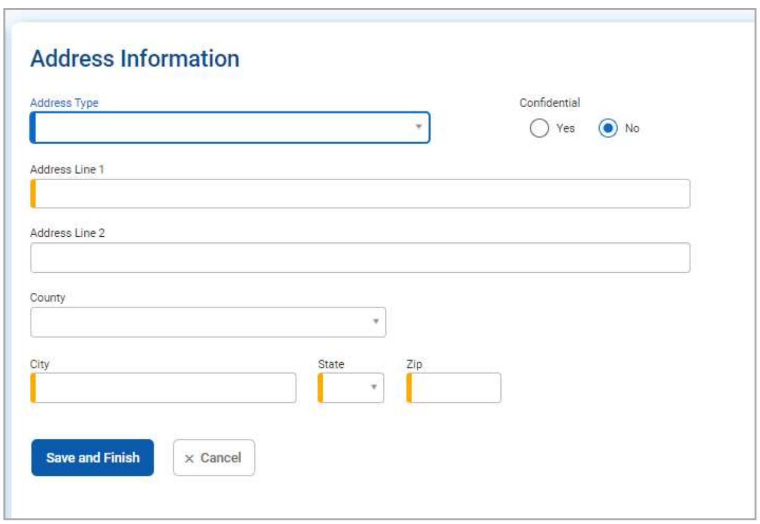
Tip: Enter the client's contact information on this screen to help locate the client for follow-ups.

1. On the **Contact Info** screen, a phone number must be entered for the client. The preferred method of contact will appear on the Client Header for the client.
2. To enter an address, click **Add Address**. This will open the **Address Information** screen.

Important: An address is required to complete a client profile.



3. Enter the client's Address Type, Address line 1, City, State, and Zip Code.



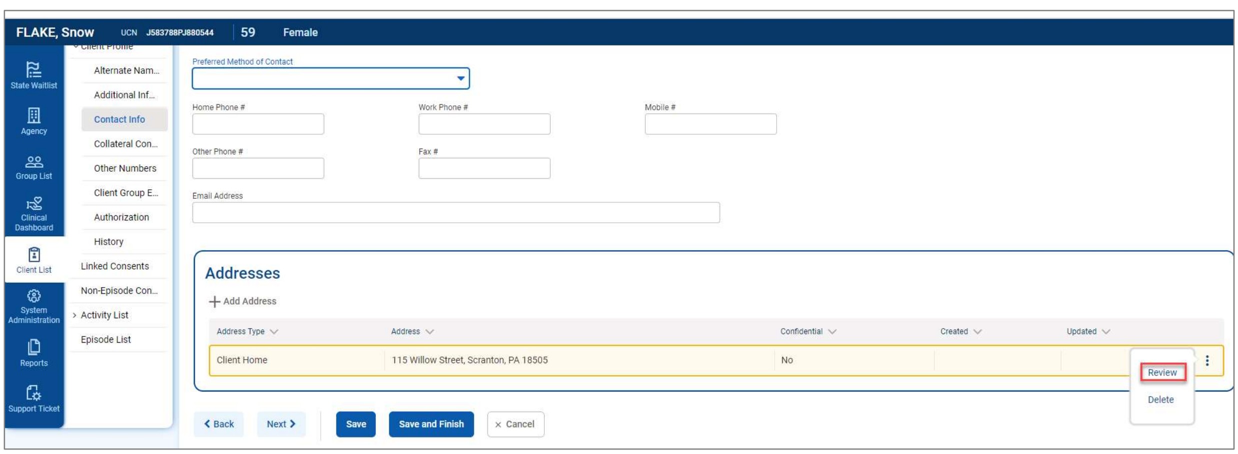
Tip: If the client is **Homeless**, select the Address Type of "**Client Homeless**". The City, State and Zip code fields will then be optional.

4. When complete, click **Save and Finish**, and the client's address information will show up on the Contact Info screen. You may enter several addresses for a client. If a client has a new address, update the Address Type of the current address record to "Previous", then create a new address.

Tip: WITS uses the USPS Address Standardization Web Tool to validate the client's address. If USPS detects any errors in the street address, WITS will display the results from USPS. You can then decide to select the original address entered or the suggested address from USPS.

If you need to edit the address, you can revise the address from the Address Information screen. Click Select for the original address.

You will be returned to the Contact Info screen. Hover your cursor over the ellipsis icon next to the address you wish to edit, then click Review.



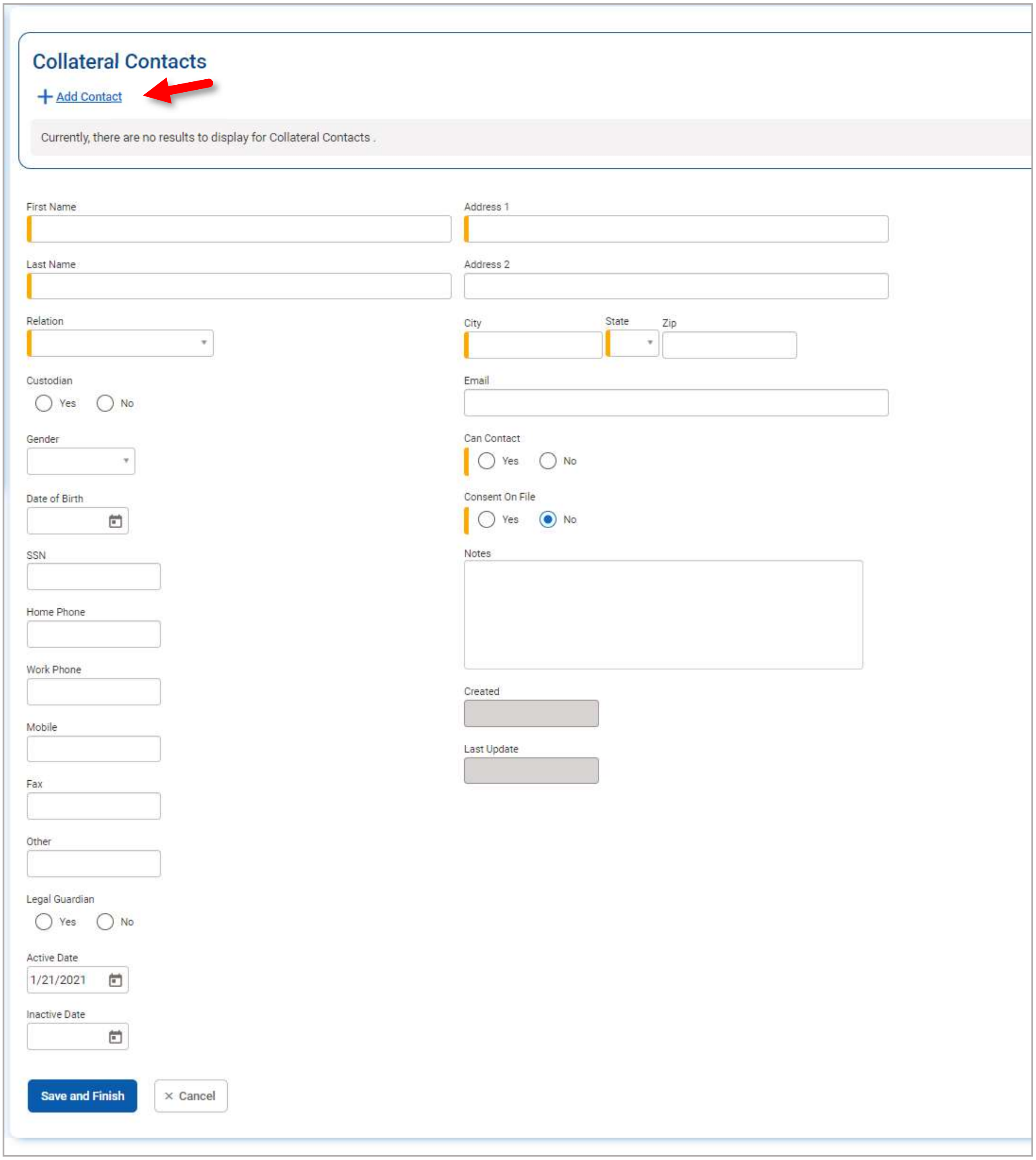
After you have edited the address, click **Save and Finish** and you will be directed back to the **Contact Info** screen.

5. From the **Contact Info** screen, click the **Next** button to open the **Collateral Contacts** screen.

Collateral Contacts

Tip: Although this section is optional, enter any collateral contacts for the client on this screen to help locate the client for follow-ups.

1. On the **Collateral Contacts** screen, click the **Add Contact** link to enable the fields to data entry.



2. Enter the required client information. See the table below for information on the required fields.

Field	Description
First Name	Type the contact's first name.
Last Name	Type the contact's last name.
Relation	Select the collateral contact's relation to the client from the drop-down menu.
Address, **City**, **State**	Type the contact's address information
Can Contact	Select Yes or No.
Consent On File	Select Yes or No.

3. When complete, click **Save and Finish.** The collateral contact's name(s) will be displayed in the list section of the screen.

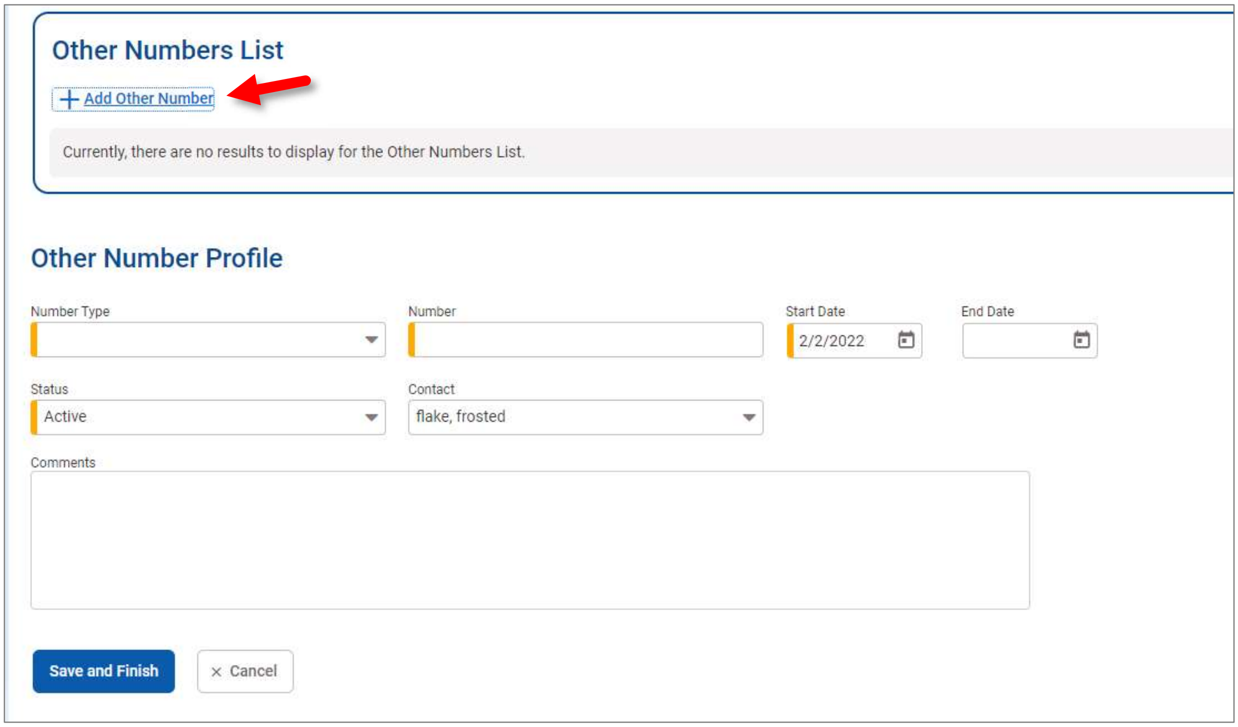
4. From the **Collateral Contacts** screen, click the **Next** button to open the **Other Numbers** screen.

Other Numbers

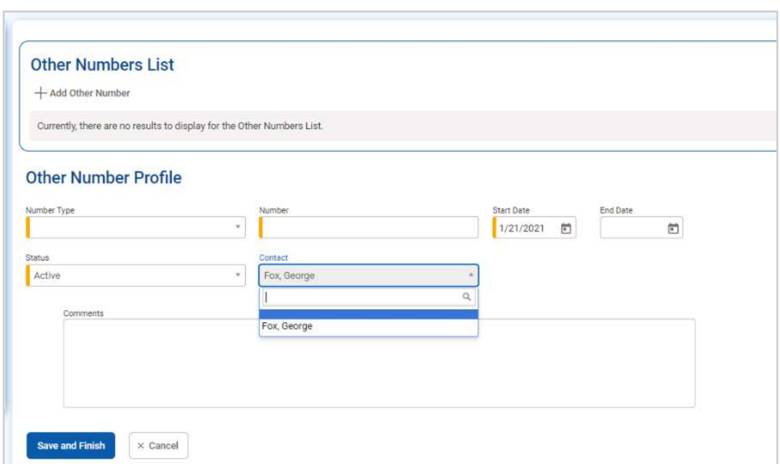
In this section, users can add additional identifying numbers for a client, such as a court case number. (This section is optional and does not need to be completed for the profile to be considered complete.)

1. On the **Other Numbers** screen, click the **Add Other Number** link. The bottom half of the screen now becomes editable.

2. Fill in information such as, Number Type, Number, Start and End Date, Status, and Contact.



3. The **Contact** dropdown box will display the names of any saved Collateral Contacts from the previous screen. If the name of the Collateral Contact is not present, click on the **Collateral Contacts** screen to add a new record.



4. When complete, click **Save and Finish**. The numbers now show up in the list.

5. Click the **Next**> button to move to the **Client Group Enrollment**.

Client Group Enrollment

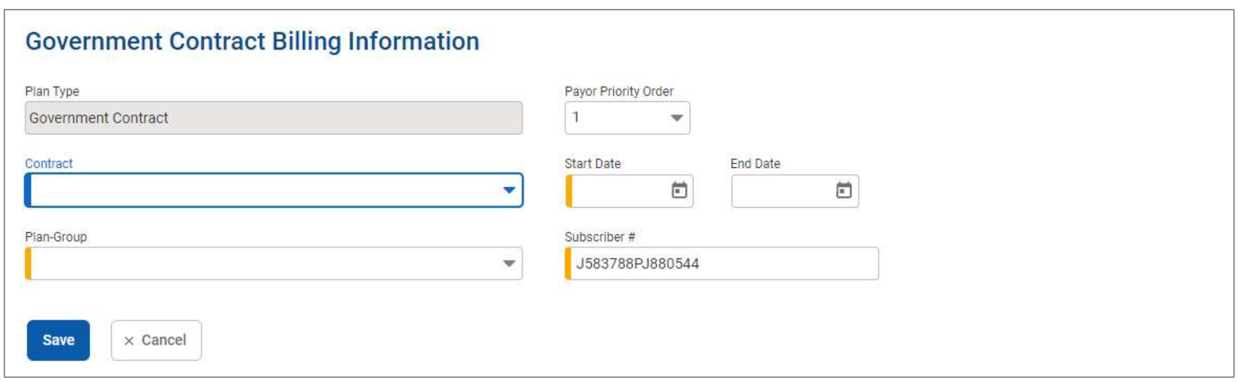
Important: A **client group enrollment (CGE)** must be entered for each client. This will identify the funding source for the client. If the client is not being funded by an SCA, there is a "**No SCA**" option that can be selected. The CGE can be updated as funding sources change.

1. Click **Add Government Contract Enrollment**.

2. Select the Contract, or funding source, from the drop-down menu. The options will be an SCA that the provider contracts with, including No SCA, when the client is using a funding source not from the SCA.

   The Plan-Group field will auto-populate with the appropriate information based on the Contract selected.

   The Subscriber # will auto-populate with the client's UCN.

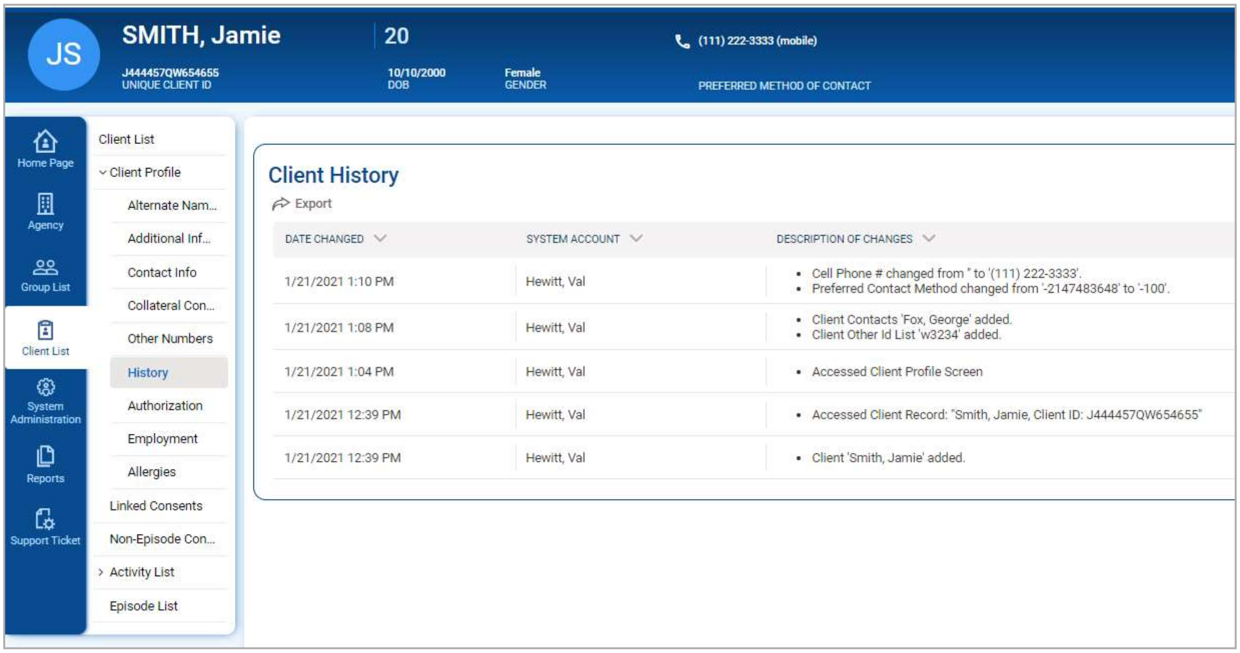


3. Enter the Start Date, which is the date the selected funding source will begin covering services.
4. Click **Save**.
5. On the Payor List, click **Finish**, and you will be returned to the **Client Search** screen.

Tip: If a client's funding source changes, update the **Client Group Enrollment**. To add a new funding source, follow the steps outlined above. To end the previous funding source, hover over the ellipses, then select **Edit.** Enter an End Date to the Payor Enrollment, then click **Save**.

History

The **History** sub-menu displays a list of all changes that have been made to the client information as well as any access to this client's record. It lists the date, the staff person, and a description of the access or change.



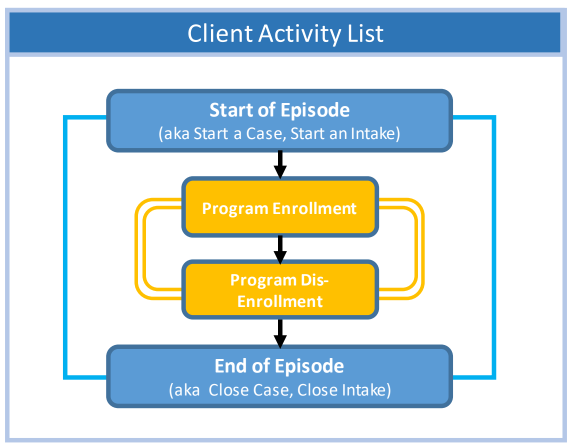
Part 3: Client Intake and Program Enrollment

Client Activity List

It is important to understand that data collection in WITS happens within a Client's Activity List. The Case, or Episode of Care, is the container that holds all client activities. The beginning and end of a client's Episode of Care are recorded on the Intake transaction, where the Intake Date starts the Episode and the Intake Date Closed marks the end of the Episode.

The concept diagram below illustrates how this data collection is structured within the client Activity List. This Activity List is comprised of two (2) primary nested containers: Episode (e.g., Case, or Intake), and Program. The double lines connecting the Program container represent multiple program enrollments, which are allowed within a single Episode. In the diagram, arrows denote the sequence of progressing through each container.

When an Episode of Care ends for a client, this signifies that the client is no longer receiving services. It's possible for that client to return at a future date.

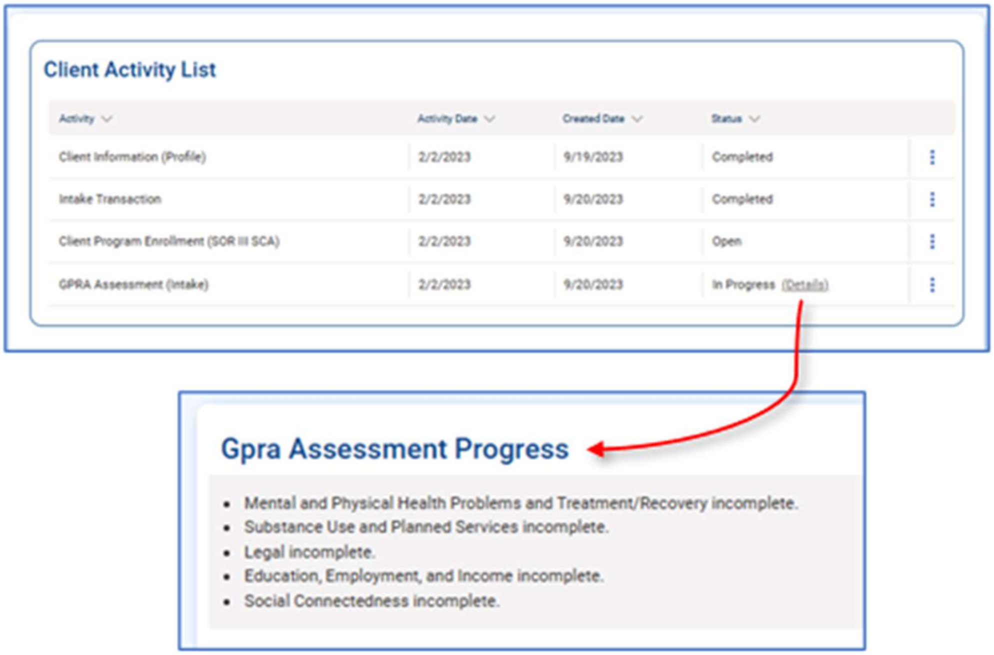


To access items within the Activity List, a client must be selected first.

The **Client Activity List** can serve as a "dashboard' view for information that has been collected for a given client within an Episode. Each Activity on the Activity List has a status to help the end user determine if that activity is "Complete" or "In Progress". When an activity is "In Progress", a **Details** link is available which displays the information needed to complete the activity.

Certain client activities must be complete before you can proceed to the next activity. Validation rules will guide you throughout the workflow as you enter new data.

Some Client Activities do not have a concept of being complete. For those activities, the Status will be listed as Not Applicable. Client Program Enrollments will have a status of "Open" until an End Date is entered to close the enrollment.


Client Activity List
Activity
Activity Date
Created Date
Status
Client Information (Profile)
2/2/2023
9/19/2023
Completed
Intake Transaction
2/2/2023
9/20/2023
Completed
Client Program Enrollment (SOR III SCA)
2/2/2023
9/20/2023
Open
GPRA Assessment (Intake)
2/2/2023
9/20/2023
In Progress (Details)
Gpra Assessment Progress
Mental and Physical Health Problems and Treatment/Recovery incomplete.
Substance Use and Planned Services incomplete.
Legal incomplete.
Education, Employment, and Income incomplete.
Social Connectedness incomplete.

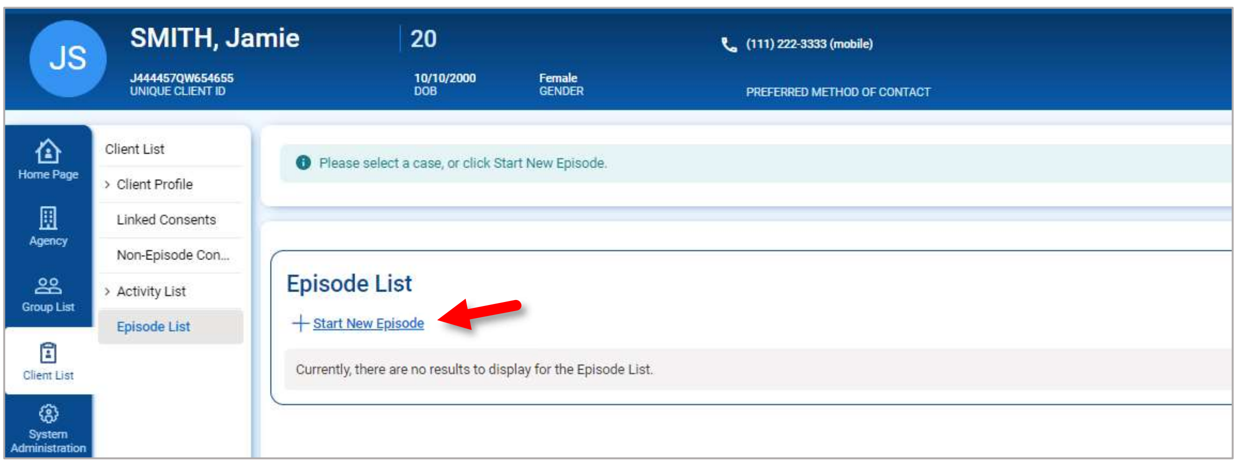
Start New Episode (New Clients)

Where:* Client List > Activity List > *Episode List

In WITS, all items located in a client's Activity List are based upon an active Episode of Care, which is started by creating an Intake. Initially, the Activity List in the left menu only displays one item, "Episode List". Complete an Intake to access other items in the client's Activity List.

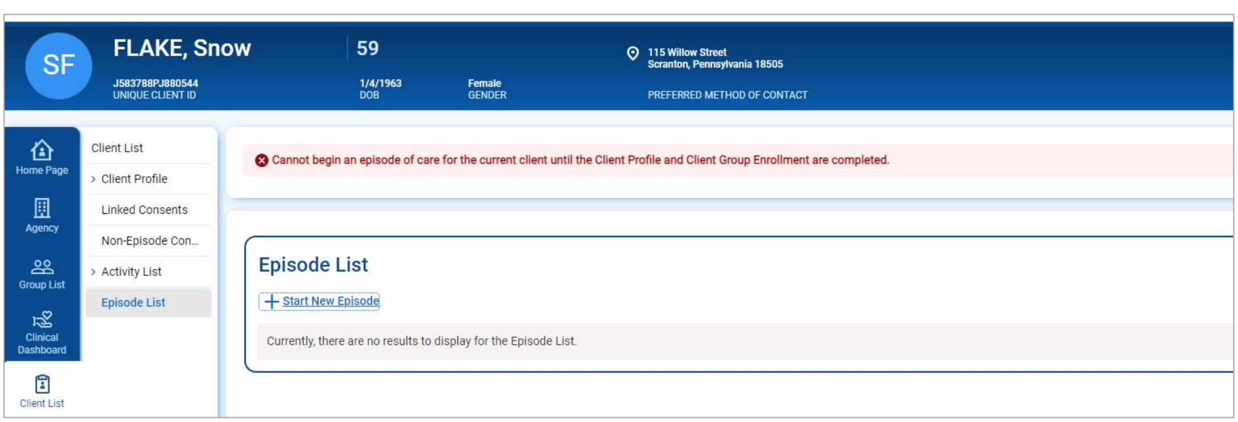
To start a new episode of care for a client, follow the steps below.

1. On the left menu, click **Episode List**.
2. Click the **Start New Episode** link.



If the client profile is complete, clicking **Start New Episode** will open the **Intake Case Information** screen.

Important: If the client profile is **missing** certain information, such as an **Address** or fields on the **Additional Information** screen, a New Episode cannot be created, and an error message will appear.



Intake

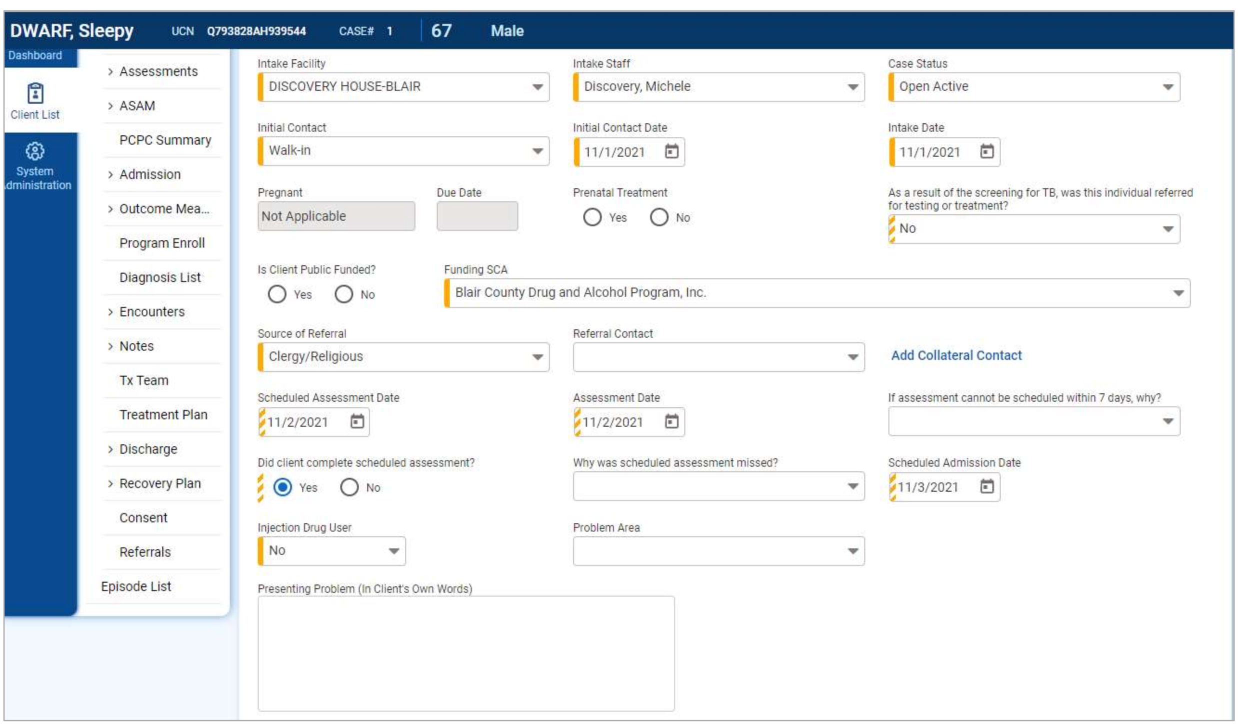
Where: Client List > Activity List > Intake

Once an episode of care has been created (see above section), complete the client's intake.

1. On the Intake Case Information screen, complete the fields as shown in the table below.

1. Field	Description
Intake Facility	Pre-populates with the current facility location.
Intake Staff	Pre-populates with the current staff member name.
Initial Contact	Select from the drop-down list.
Case Status	Defaults to "Open Active".
Initial Contact Date	The date when the Client first reached out for treatment. For the clients first intake in PA-WITS this field will be editable. When a client is referred from one agency to another, the Initial Date of Contact will be in a Read-Only mode. This field is used in calculations for the Case Management Resource Report.
Intake Date	Enter the client's intake date, (which also marks the beginning of the client's Episode). This field is used in calculations for the Case Management Resource Report.
As a result of the screening for TB, was this individual referred for testing or treatment?	Select from the drop-down list.
Is Client Public Funded?	(Optional)
Funding SCA	Select from the drop-down list.
Source of Referral	Select from the drop-down list. **Note:** The Source of Referral should be the original/initial referral source.
Referral Contact	(Optional) Select from a list of the client's collateral contacts.
Pregnant	Is the client pregnant at the time of admission? Complete if applicable.
Due Date	(Optional)
Prenatal Treatment	(Optional) Is the client also receiving prenatal treatment? Select Yes/No if applicable.
Injection Drug User	Select Yes or No.
Problem Area	(Optional)
Presenting Problem (In Client's Own Words)	(Optional)
Scheduled Assessment Date	This field is used in calculations for the Case Management Resource Report. Note: Changing the value of this field will cause the screen to be refreshed.
Assessment Date	This field is used in calculations for the Case Management Resource Report. Note: Changing the value of this field will cause the screen to be refreshed.

1. **Field**	**Description**
If assessment cannot be scheduled within 7 days, why?	This field is used in or the Case Management Resource Report. Note: Changing the value of this field will cause the screen to be refreshed.
Did client complete scheduled assessment?	This field is used in or the Case Management Resource Report. Note: Changing the value of this field will cause the screen to be refreshed.
Why was scheduled assessment missed?	This field is used in or the Case Management Resource Report. Note: Changing the value of this field will cause the screen to be refreshed.
Scheduled Admission Date	This field is used in or the Case Management Resource Report. Note: Changing the value of this field will cause the screen to be refreshed.
Special Initiatives/Populations Selected	Select one or more options. If client is not part of a Special Initiative or Population, select None.
Inter-Agency Service Selected	(Optional)
Selected Domains	This field will be pre-populated and read-only if there is only one domain associated with the agency. If the agency has multiple domains, select the appropriate domain(s) for the client.
Date Closed 	The Date Closed field is used to mark the end of the client's Episode.



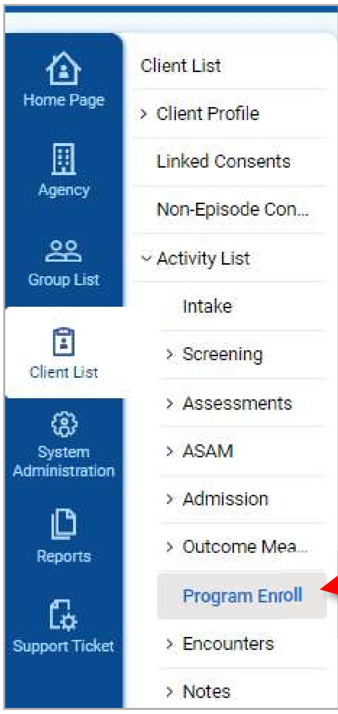
2. Click **Save and Finish**. (When the Screening Tool appears, click Cancel. Screening details are not needed for SOR.)

Program Enroll

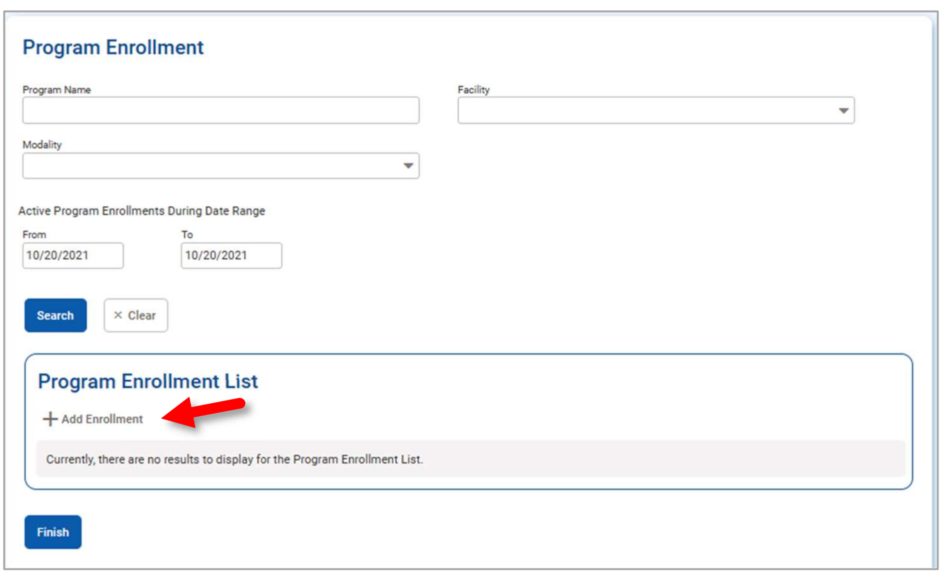
Where:* *Client List* > *Activity List* > *Program Enroll

Once an Intake has been created (see above section), complete the client's program enrollment. A program enrollment in an **SOR program** is required before a GPRA submenu becomes available.

1. On the left menu, click **Program Enroll**.

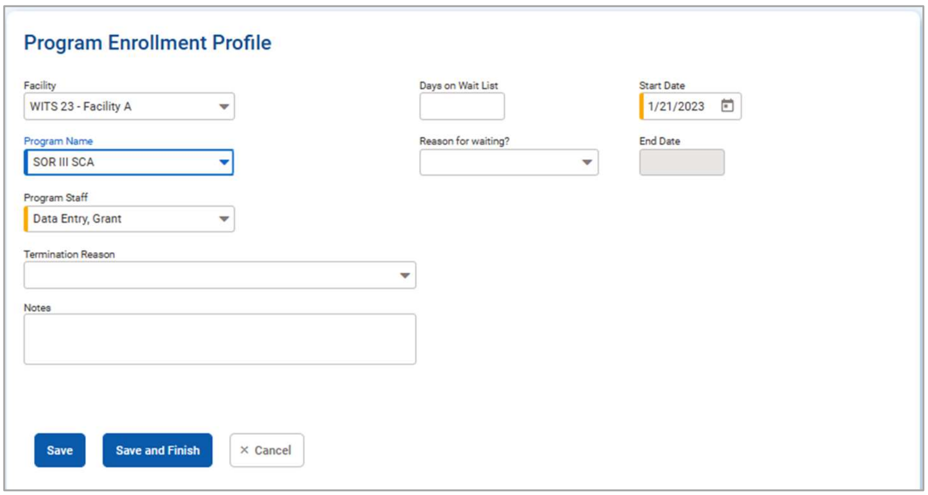


2. Click the **Add Enrollment** link.



3. Complete the fields on the Program Enrollment Profile.

Field	Description
Facility	Defaults to the current Facility name.
Program Name	Select the appropriate **SOR program** for the client
Program Staff	Pre-populates with the current staff member name.
Start Date	Defaults to the current date.
Days on Wait List (TEDS Only)	Type the number of days. (not required for a SOR Program)
Notes	Type any notes as needed.



4. Click **Save and Finish**.

5. On the Program Enrollment screen, click **Finish**.

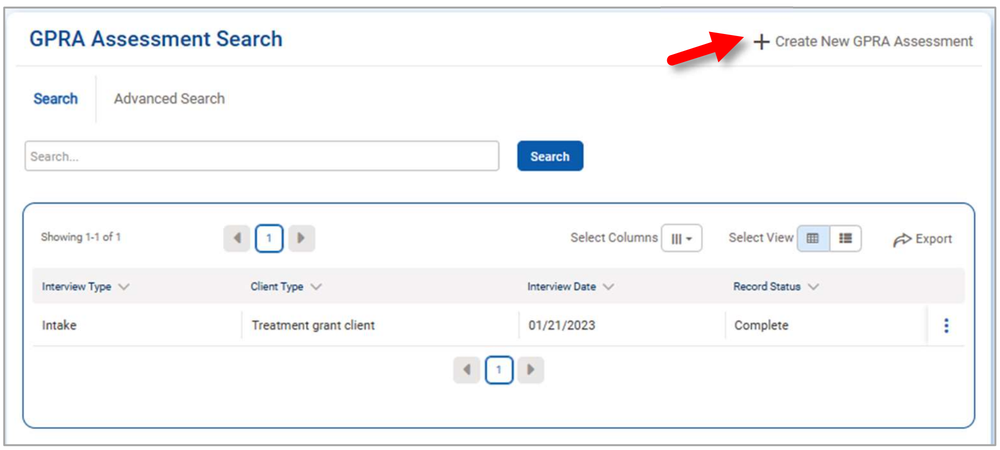
Part 4: GPRA Assessment (Interviews)

Where:* *Client List* > *Activity List* > *GPRA Assessment

To access the GPRA section in WITS, select a client from the Client List and then view the client's Activity List. The GPRA Assessment section displays a list of any previously entered GPRA Assessment (at that agency) and includes a **Create New GPRA Assessment** link to add a new interview record.

Important: The GPRA Assessment menu item will only appear if the two conditions are met:

1. The staff member completing the GPRA interview has been assigned the role, "GPRA (Full Access)" or Grant Data Entry (Full)". This role is assigned by your WITS staff administrator.
2. The client is enrolled in any SOR IV program.



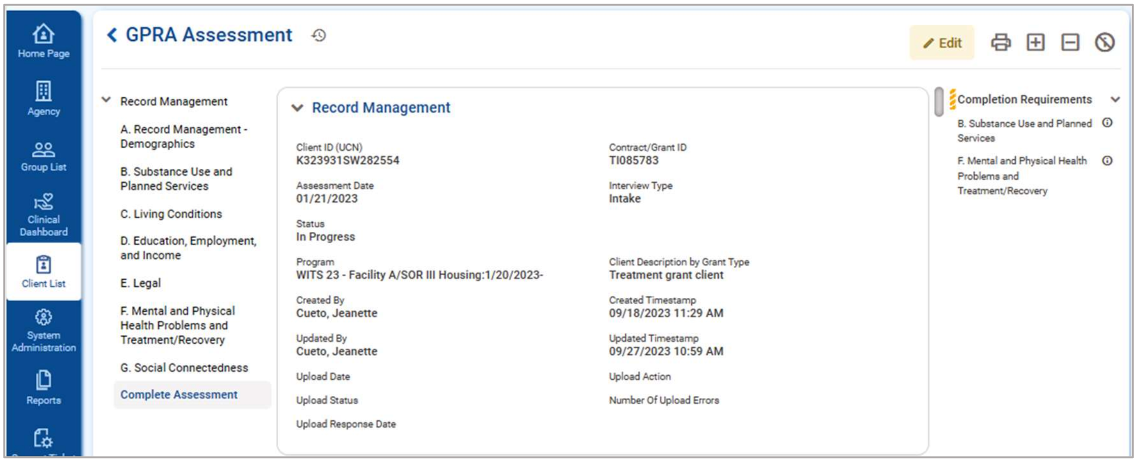
Tip: Depending on the existing GPRA interview(s), the choice of adding either a GPRA Follow up or a GPRA Discharge is available. The first GPRA Interview that can be added is the GPRA Intake.

For previously entered GPRA interviews, available actions include, View, Edit, and Delete, when you click on the three dots.

Action	Description
View	Opens the interview in read-only mode.
Edit	Opens the interview in edit mode, where certain fields can be updated. A **Done Editing** button is available on screen. **Important**: A **completed** GPRA needs to be unlocked to edit. Once the edits are complete, the GPRA needs to be re-locked so it is included in the nightly upload of data to SPARS.
Delete	A confirmation screen will appear, prompting the user to select 'Yes' or 'No' to continue with deleting the record. If a client has follow-up or discharge interview(s), those interviews must be deleted before the intake interview can be deleted. Before you delete the intake interview, you must first delete the follow-up or discharge interview(s).

GPRA Screen

The GPRA Assessment is now on one full page. On the left side of the page will be an index. Clicking the section title will bring you to that section to complete. The right side of the screen shows the sections of the GPRA that are not complete. As a section gets completed, it will disappear from the Completion Requirements panel on the right side of the screen.

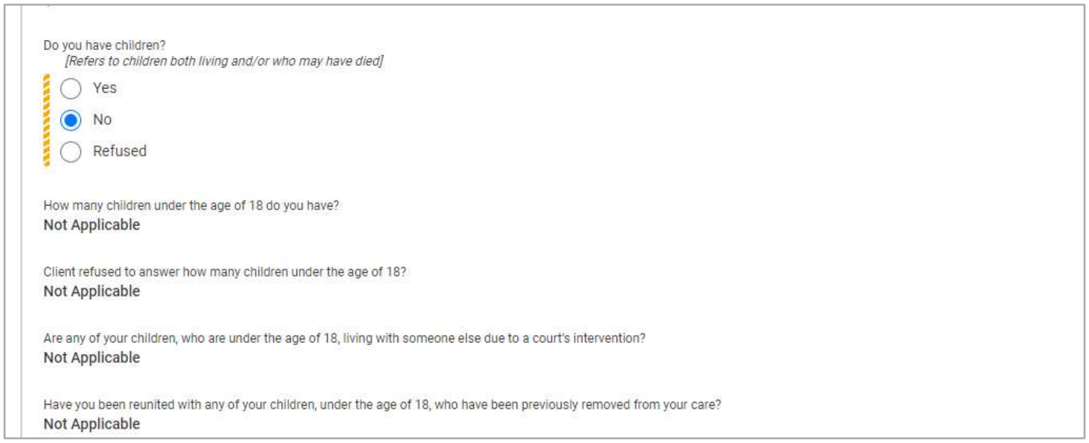


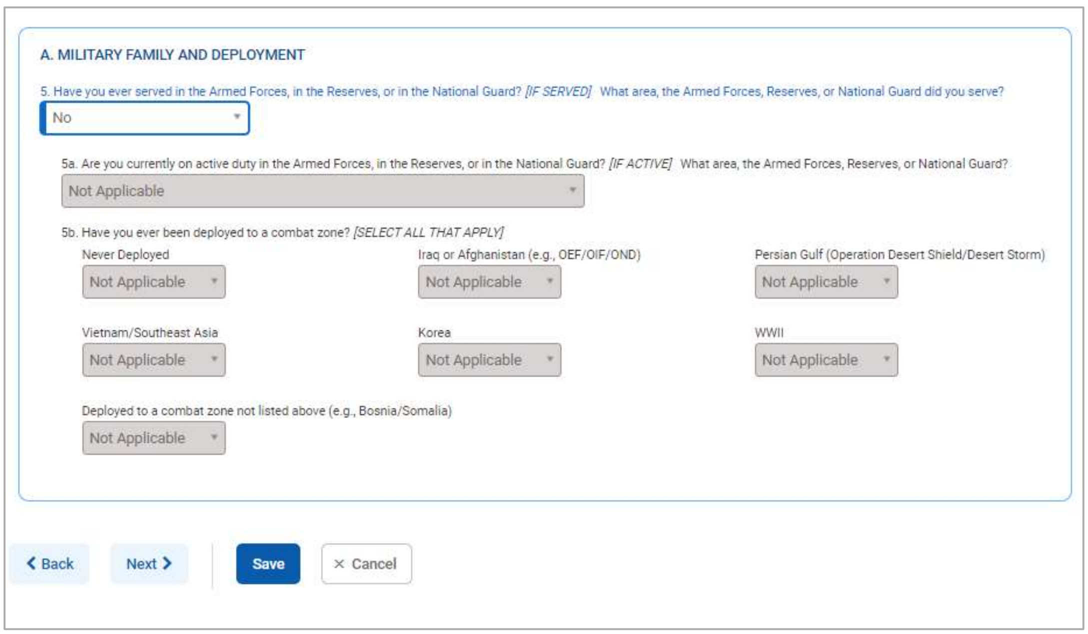
Completion Summary

A Completion Summary is shown at the bottom of each section. It shows the number of required questions in that section, the number of questions that have been completed, and the completion percentage.

Automation (Skip Logic)

Based on the client's response to certain questions, the screen will update causing some questions to become required and/or automatically filled in as read-only fields. For example, if the client does not have children the system will automatically fill in the other questions pertaining to children with "Not Applicable".

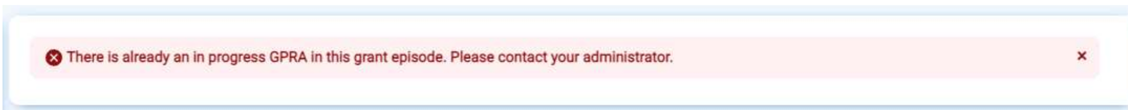

Do you have children?
[Refers to children both living and/or who may have died]
Yes
No
Refused
How many children under the age of 18 do you have?
Not Applicable
Client refused to answer how many children under the age of 18?
Not Applicable
Are any of your children, who are under the age of 18, living with someone else due to a court's intervention?
Not Applicable
Have you been reunited with any of your children, under the age of 18, who have been previously removed from your care?
Not Applicable


A. MILITARY FAMILY AND DEPLOYMENT
5. Have you ever served in the Armed Forces, in the Reserves, or in the National Guard? [IF SERVED] What area, the Armed Forces, Reserves, or National Guard did you serve?
No
5a. Are you currently on active duty in the Armed Forces, in the Reserves, or in the National Guard? [IF ACTIVE] What area, the Armed Forces, Reserves, or National Guard?
Not Applicable
5b. Have you ever been deployed to a combat zone? [SELECT ALL THAT APPLY]
Never Deployed
Not Applicable
Iraq or Afghanistan (e.g., OEF/OIF/OND)
Not Applicable
Persian Gulf (Operation Desert Shield/Desert Storm)
Not Applicable
Vietnam/Southeast Asia
Not Applicable
Korea
Not Applicable
WWII
Not Applicable
Deployed to a combat zone not listed above (e.g., Bosnia/Somalia)
Not Applicable
Back
Next
Save
Cancel

GPRA Intake Interview

***Where:* Client List > Activity List > GPRA Assessment> GPRA Intake**

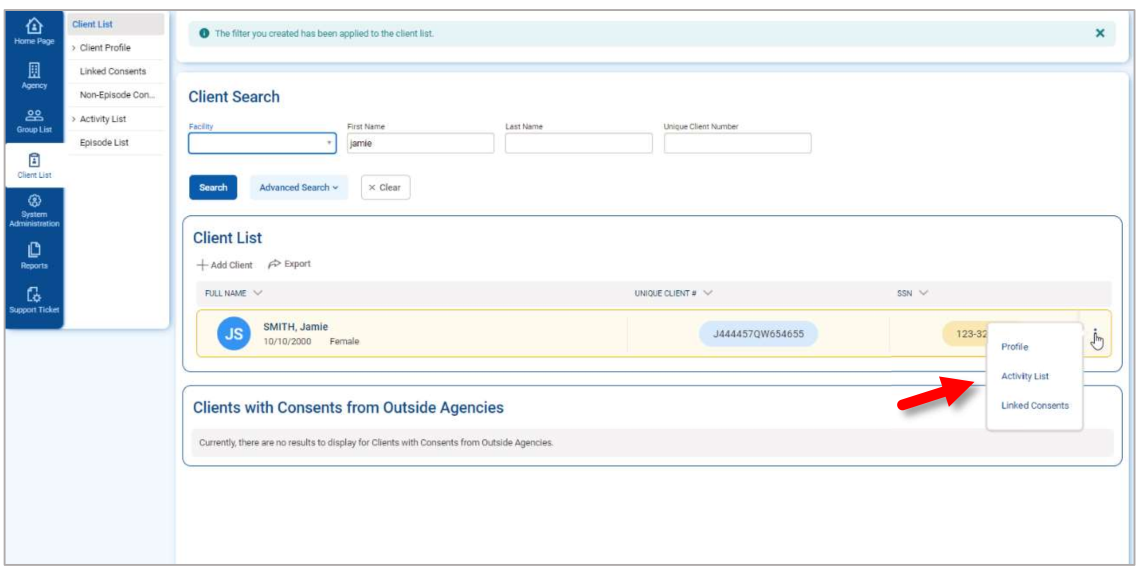
Follow the steps below to add a GPRA Intake Interview. If, when you go to record the GPRA, you receive a message that says that there is already a GPRA in progress, this means that the client has received services from another agency that is using WITS to track GPRA data.



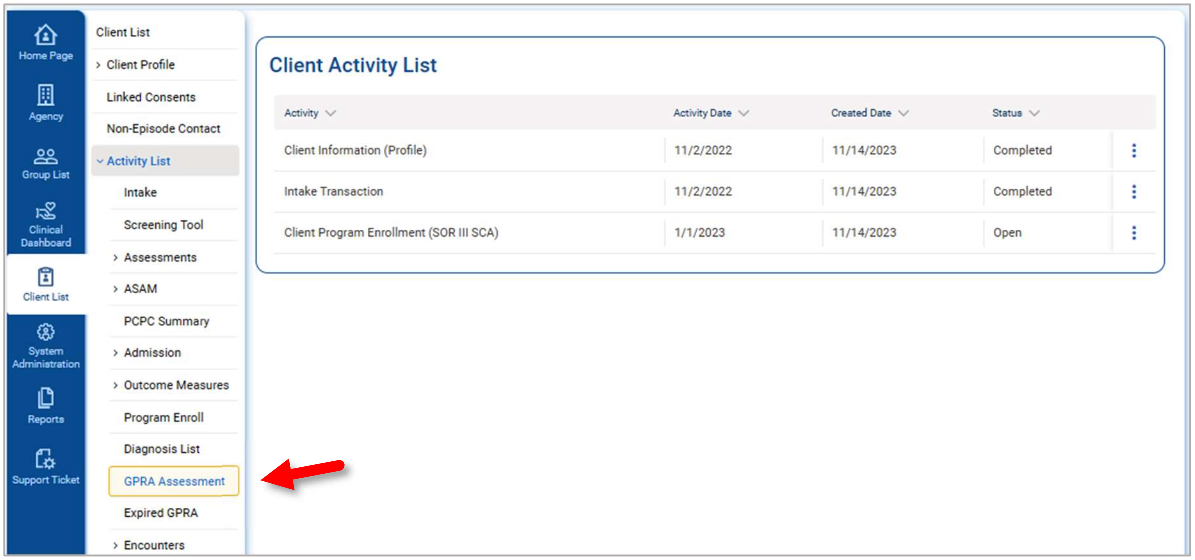
Ask the client if they remember which agency they were at before, and if they know the agency information, the two agencies for which the client is registered should coordinate efforts. **<u>The first agency will need to create a Consent and Referral in WITS to send the client to the second agency</u>**. (See the Section in this guide on Consent and Referral) That would then automatically create the Client Profile in the second agency. In order not to violate HIPAA, the staff member can ask the client and/or the first agency that he or she was registered with.

If the providers cannot coordinate on their own, or if the client does not know the other agency where they previously had an episode, then contact your SCA WITS administrator to coordinate the process.

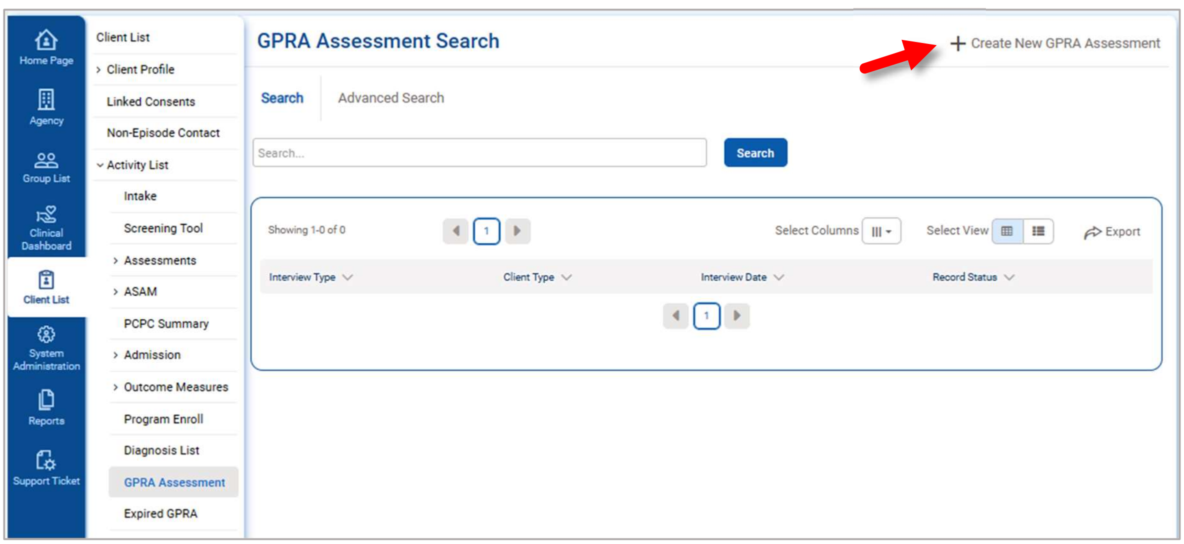
1. To access the GPRA interview, select a client from the **Client List**, hover over the ellipsis, and then click **Activity List**.



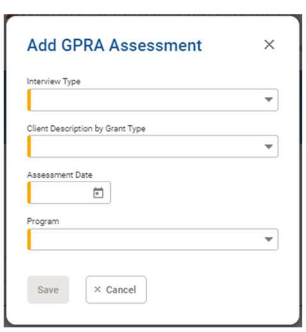
2. On the left menu, click **GPRA Assessment**.



3. On the GPRA Assessment screen, click **Create New GPRA Assessment**.

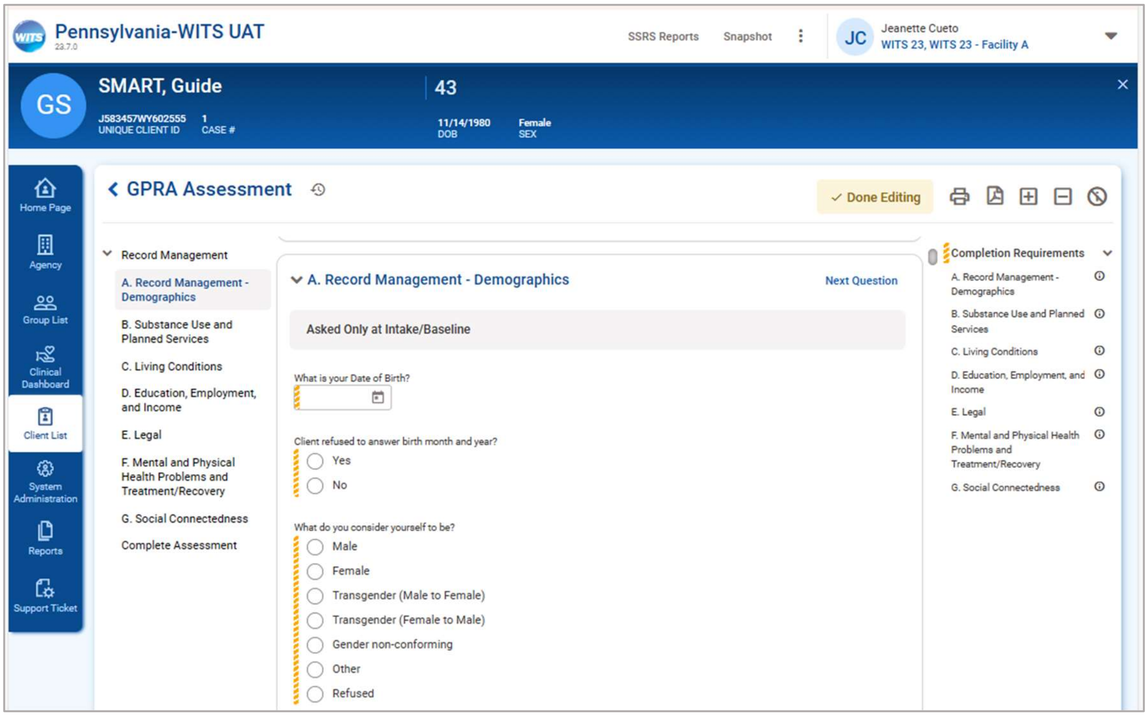


4. In the pop-up window, select GPRA Intake for the interview type and the client description, input the interview date and select the SOR program enrollment. Click **Save**.



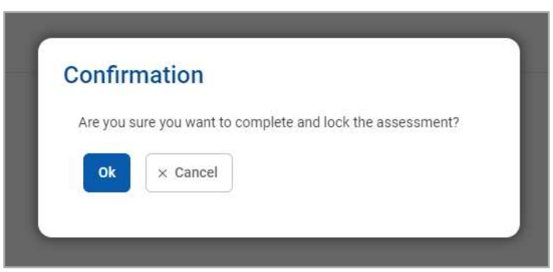
5. The system will display the GPRA. Complete the required fields.

Note: The 'Assessment Date' must be on or after the client intake date, and not earlier than 1/21/2023 (which is the effective date of the new GPRA Assessment form). It must occur during the active period of the selected program enrollment.

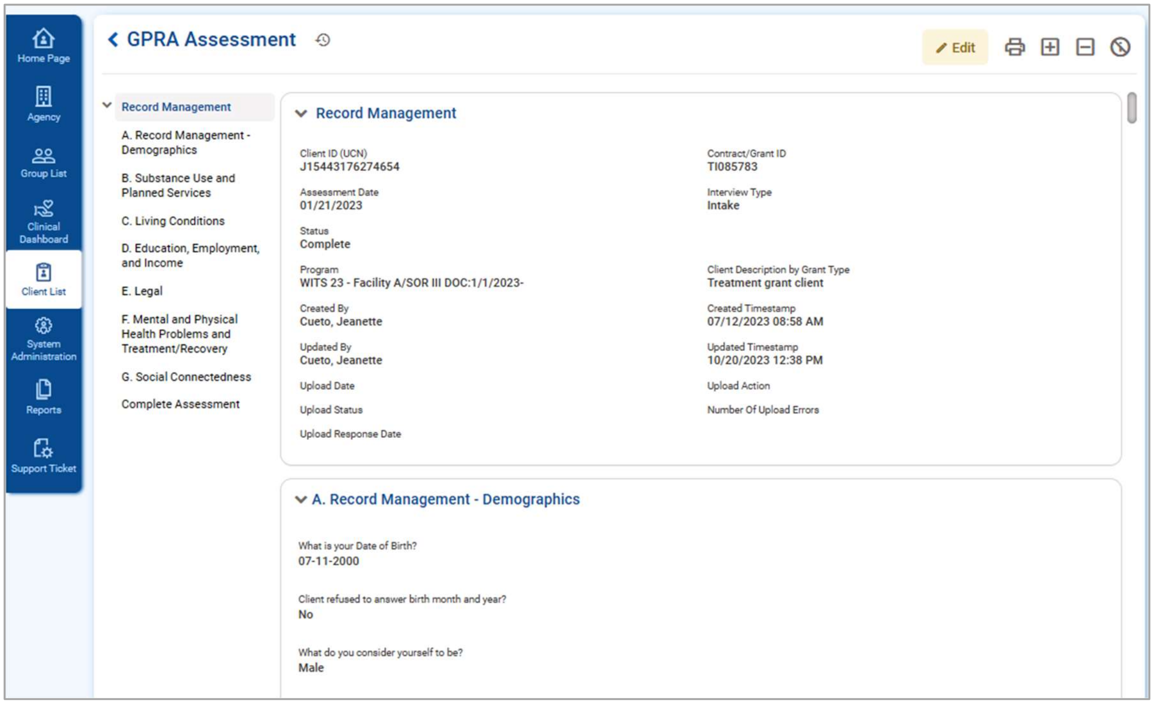


6. Once all questions have been answered, scroll to the bottom of the summary and then click **Complete**.

7. A confirmation pop up will appear asking to confirm that the assessment is complete and to lock the assessment. Once locked, the assessment cannot be edited unless the assessment is unlocked. Click **Ok**.



8. Once the GPRA is completed, the GPRA summary information will show. This is all the GPRA information in a read-only format.

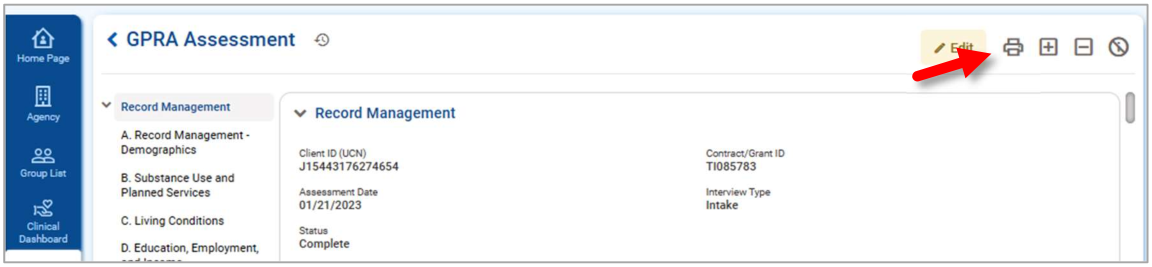


9. At the bottom of the page, the Compete Assessment section will show that the user needs to unlock it (to edit it), and which user completed it, with a date of the completion.

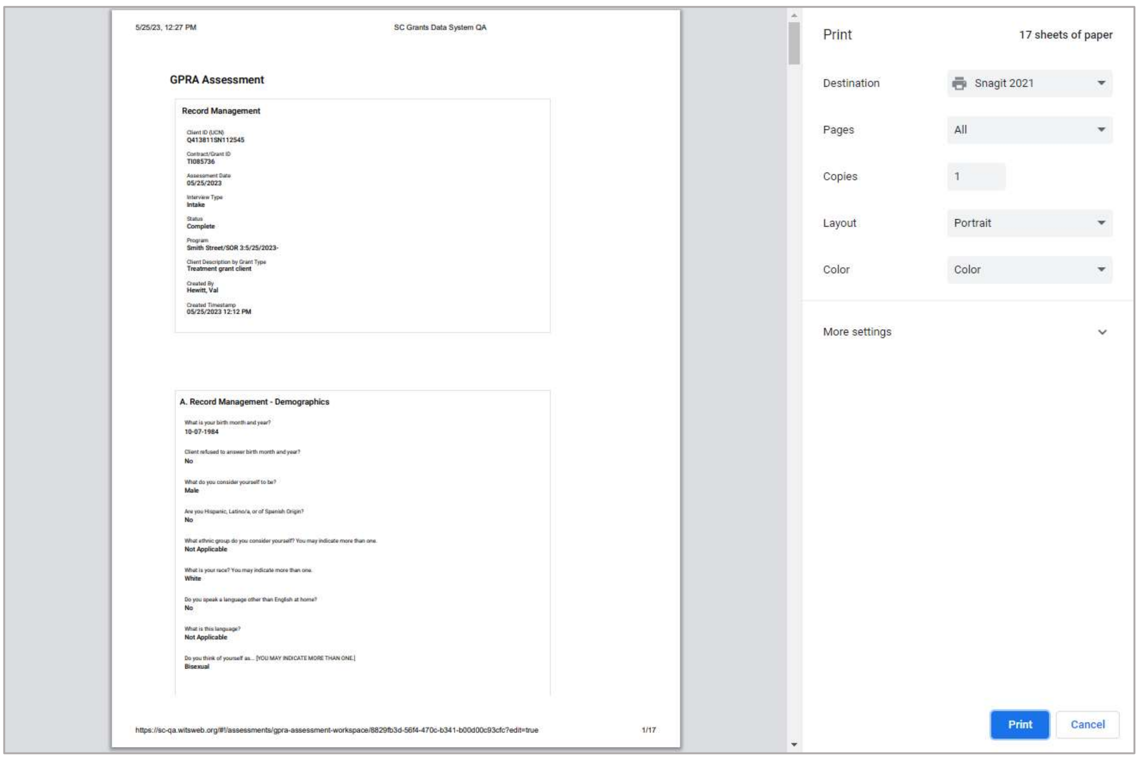
Printing a GPRA Assessment

GPRAs can be printed on paper or PDF. To print a completed GPRA, from the GPRA summary page:

1. Click the PDF icon in the upper right corner. (Do not use the Generate Report link at the page header.)



2. The printer-friendly version of the GPRA will show. Follow your computer's instructions on printing, or printing to PDF.



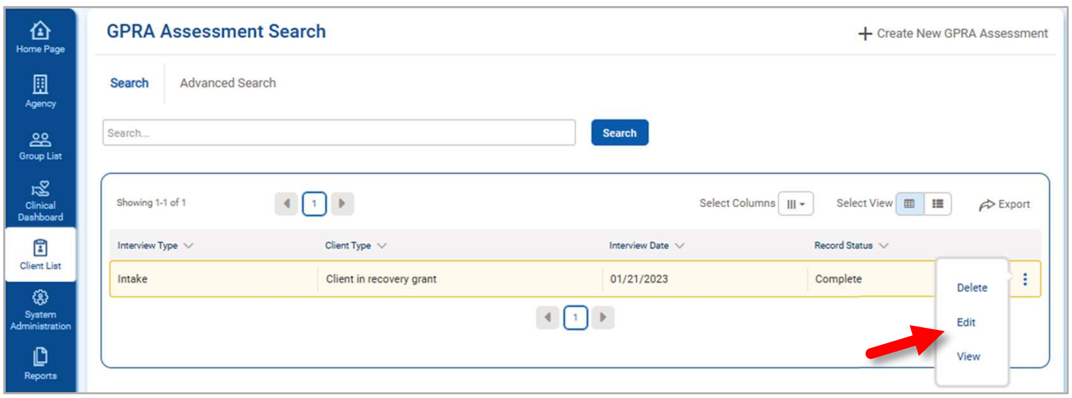
Editing a GPRA Assessment

Before attempting to edit a GPRA, determine first if the GPRA upload status is Accepted, Rejected or Uploaded. When the GPRA has not been uploaded, the record status may still be in In Progress or Completed. If the GPRA status is Uploaded, the GPRA cannot be edited.

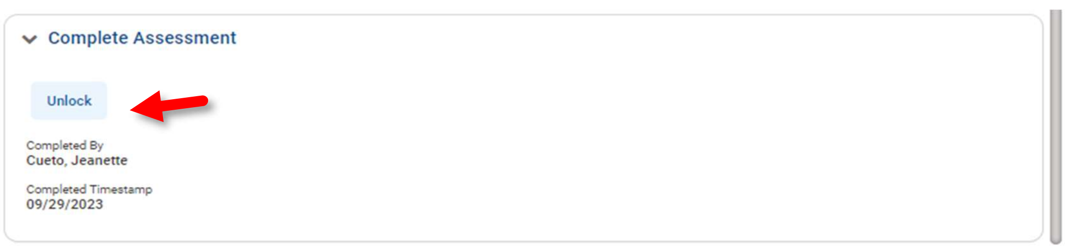
To edit a GPRA in Rejected status, the Assessment must first be unlocked. Once unlocked, the change can be made. After the update is made the assessment must be locked again. An assessment that is left unlocked will not be sent to SPARS for updated information and may affect your compliance rate. It is critical to lock an assessment after the change has been made. If the GPRA status is Accepted, please refer to the next section for additional steps.

To edit a GPRA:

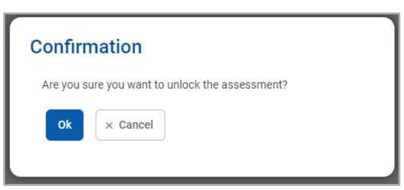
1. From the GPRA Assessment page, hover over the ellipses and click **Edit**.



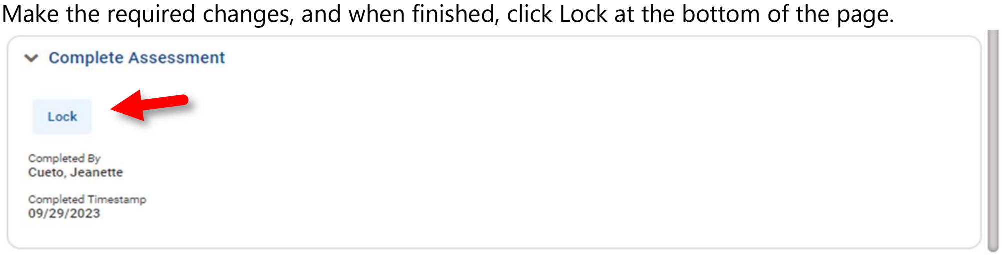
2. Scroll to the bottom of the page and click **Unlock**.



3. A confirmation box will appear confirming that you would like to unlock the assessment. Click Ok.



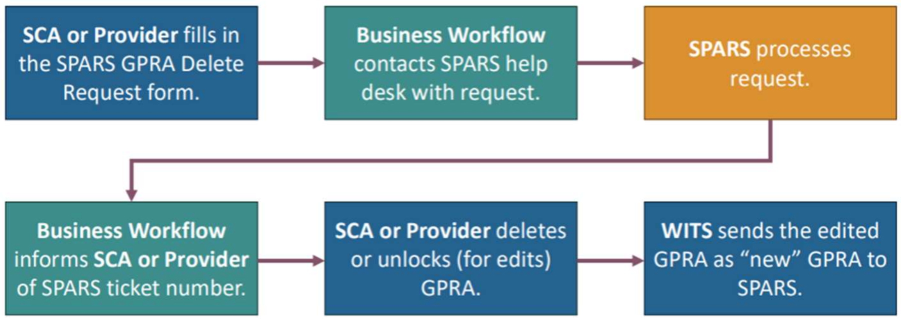
4. Make the required changes, and when finished, click Lock at the bottom of the page.



Editing or Deleting a GPRA that has been accepted by SPARS

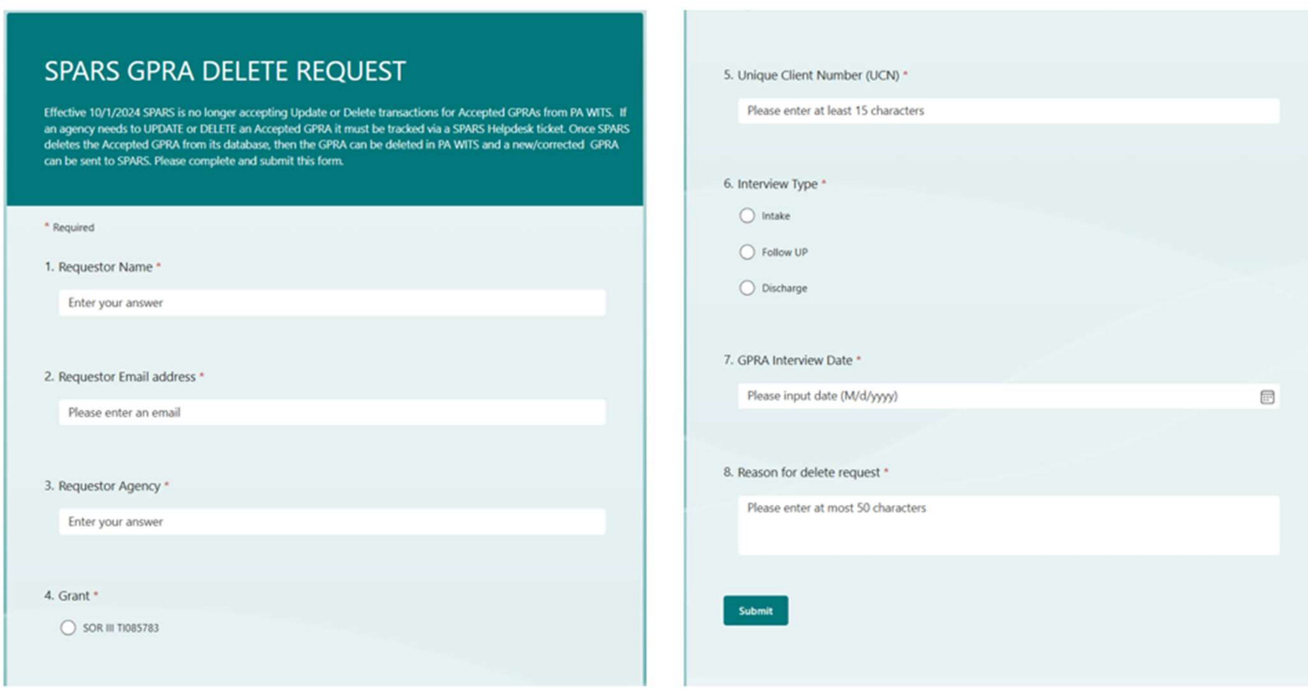
If a GPRA has been accepted by SPARS, the GPRA record needs to be deleted first from the SPARS database. This is because the edited GPRA in WITS will be re-submitted to SPARS as a new record, replacing the GPRA that has been deleted from the SPARS database.

This process outlines the steps to be taken to delete a GPRA that has been accepted by SPARS. Note that a user can still update or delete GPRAs that are not in Accepted or Uploaded status using the basic process.



To be able to either delete or unlock/lock a GPRA that has been accepted by SPARS, the user at the SCA or the provider must have the 'Update and/or Delete GPRA' role, which can be assigned to the user by the agency's 'Staff Administrator' in WITS.

To begin the process, the SCA or the provider fills out the SPARS GPRA Delete Request Form that can be found in this link: https://forms.office.com/g/DeFhtyjhBs



SPARS GPRA DELETE REQUEST

Effective 10/1/2024 SPARS is no longer accepting Update or Delete transactions for Accepted GPRAs from PA WITS. If an agency needs to UPDATE or DELETE an Accepted GPRA it must be tracked via a SPARS Helpdesk ticket. Once SPARS deletes the Accepted GPRA from its database, then the GPRA can be deleted in PA WITS and a new/corrected GPRA can be sent to SPARS. Please complete and submit this form.

* Required

1. Requestor Name *
Enter your answer

2. Requestor Email address *
Please enter an email

3. Requestor Agency *
Enter your answer

4. Grant *
SOR III TI085783

5. Unique Client Number (UCN) *
Please enter at least 15 characters

6. Interview Type *
Intake
Follow UP
Discharge

7. GPRA Interview Date *
Please input date (M/d/yyyy)

8. Reason for delete request *
Please enter at most 50 characters

Submit

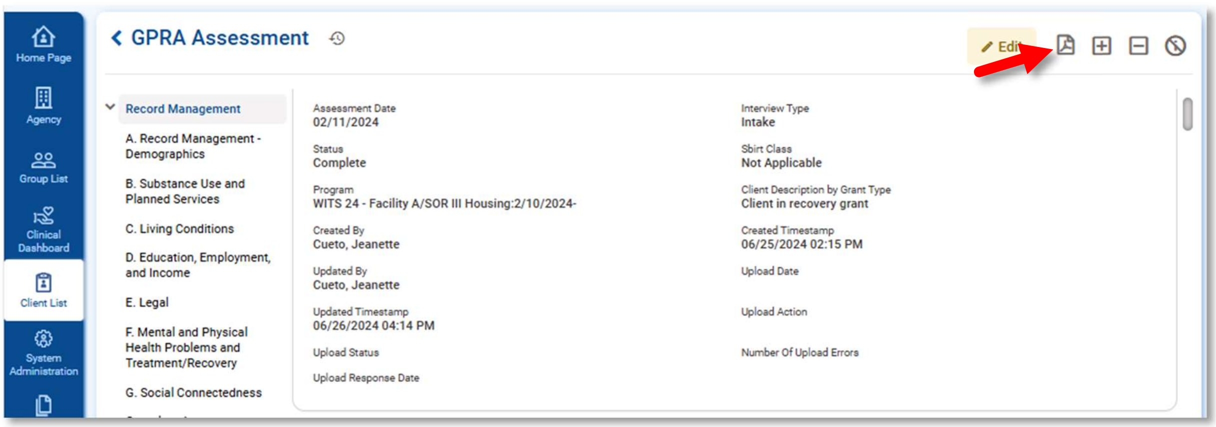
The PA Helpdesk contacts the SPARS Helpdesk, which in turn provides the SPARS ticket number and confirmation that the request has been processed. The SCA or provider will input the SPARS ticket number in the pop-up window to confirm the edit or delete action on the selected GPRA.

Upgrading the GPRA into the latest version

GPRAs in later versions contain additional rules and validations to prevent common errors encountered in earlier versions. GPRAs that are rejected or cannot be completed due to a missing question/answer or incorrect answer may need to be updated into the latest GPRA version. The GPRAs that can be upgraded are those in Rejected or In Progress status.

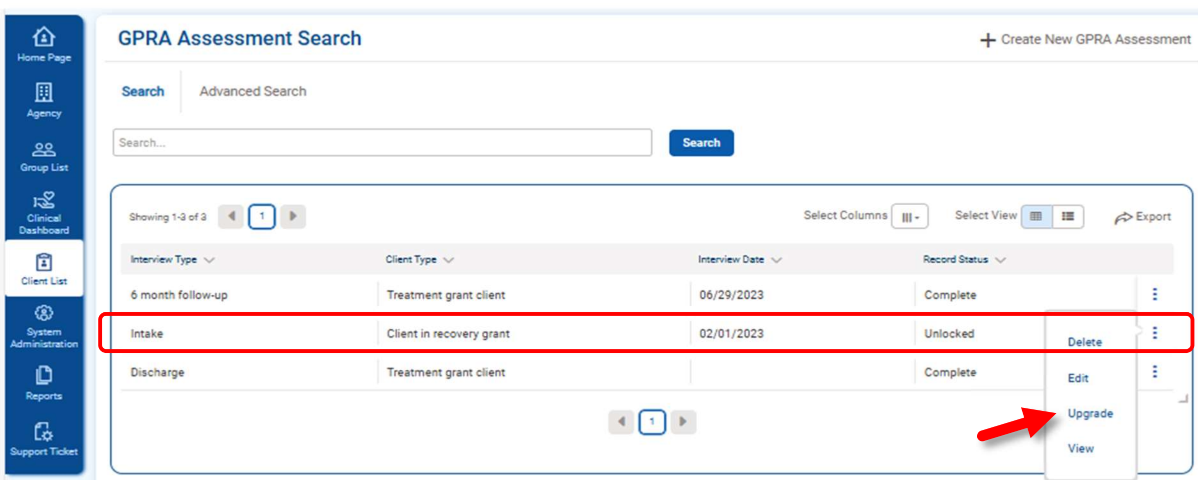
To upgrade a GPRA:

1. Create a copy of the GPRA to have a record of the GPRA prior to the upgrade. At the GRPA Assessment List page, select the GPRA that will be upgraded. After selecting View or Edit, the GPRA displays with the Generate Report icon on the top right side of the page. Make a copy of the GPRA in its current version to have a record of how questions were initially answered.



2. Click Edit (button shown in the image above). Scroll to the lowest section and Unlock the GPRA.

3. Go back to the GPRA list page, click on the ellipsis and select Upgrade.



GPRA Follow-up Interview

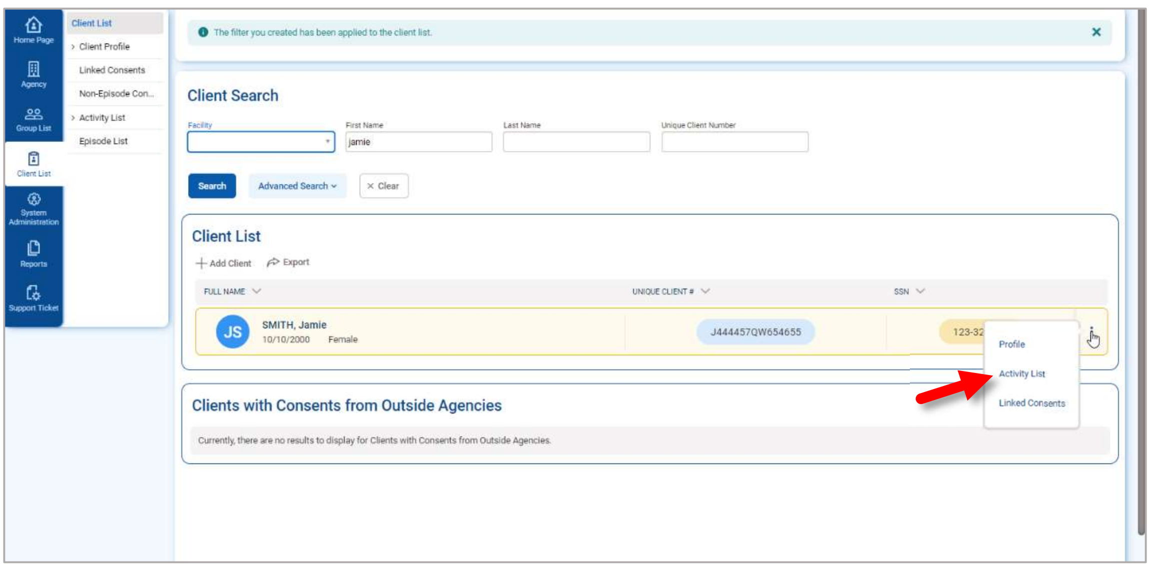
***Where:* Client List > Activity List > GPRA > GPRA Follow-up**

GPRA Follow-up Interviews should be added 5 to 8 months after a client's GPRA Intake Interview date. Follow-up GPRA Interviews include additional questions to record the follow-up status. To add a follow-up record, follow the steps below.

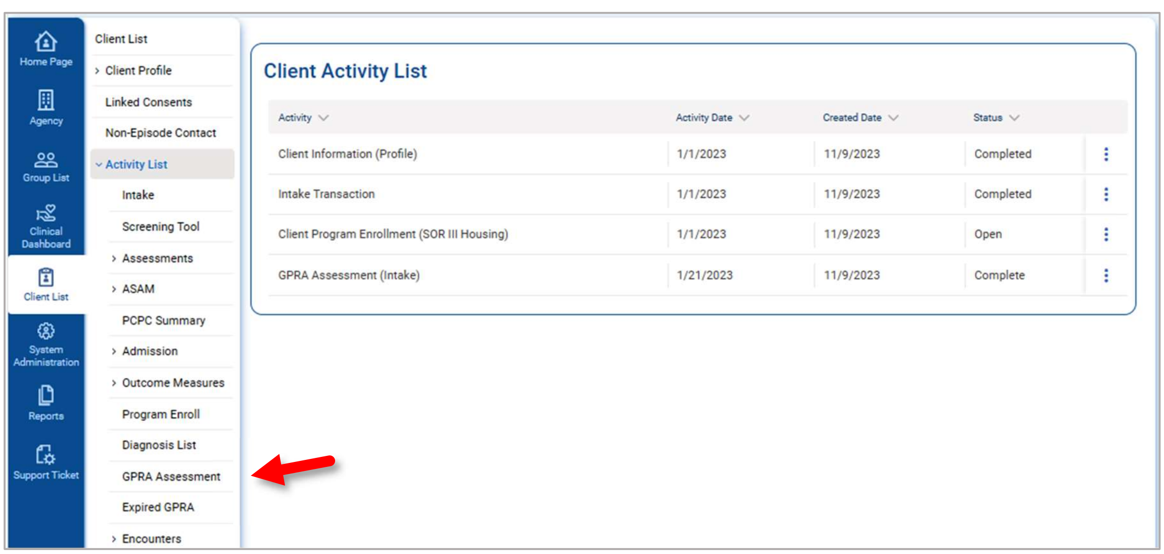
Note: If a follow-up interview has been conducted, **sections B through G** and **I** must be completed.

If the follow-up interview was ***not*** conducted, **section I** must be completed.

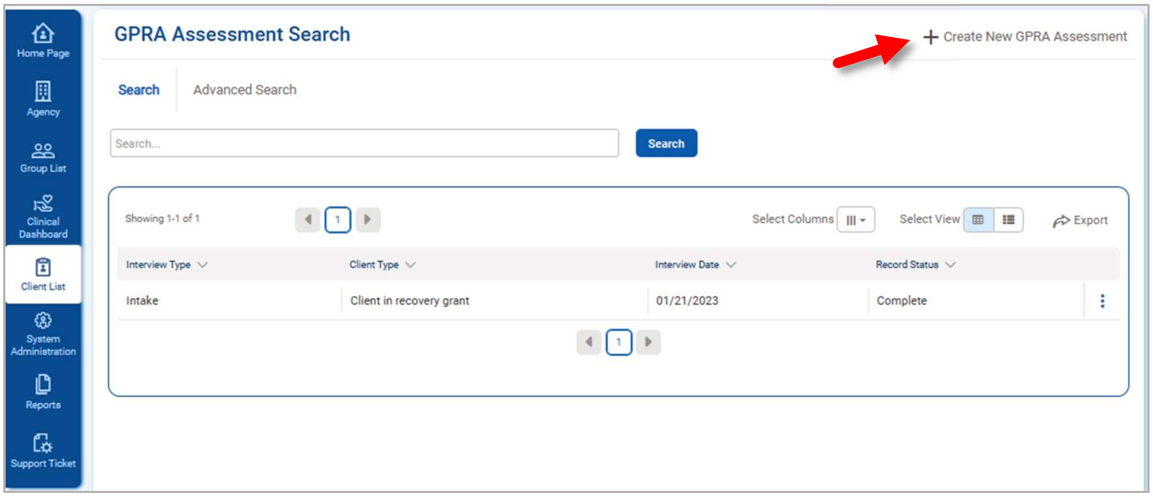
1. To access the GPRA interview, select a client from the **Client List**, point to the ellipsis in the Actions column, and then click **Activity List**.



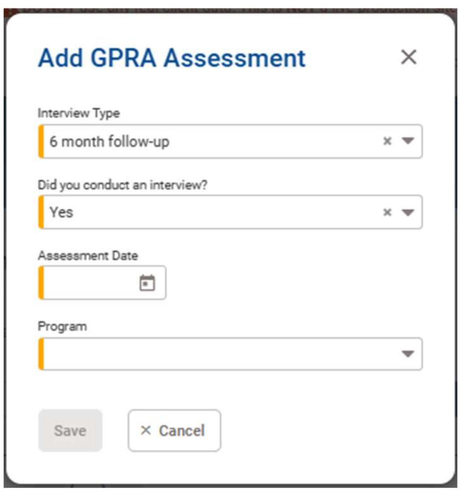
2. On the left menu, click **GPRA Assessment**.



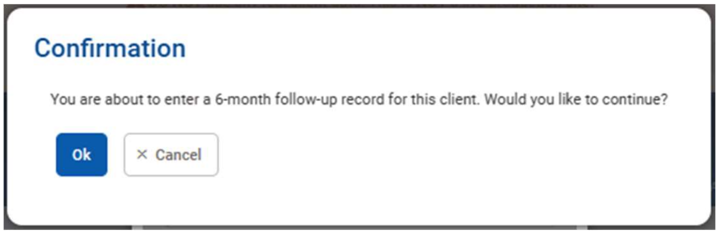
3. On the GPRA List screen click **+Create New GPRA Assessment**.



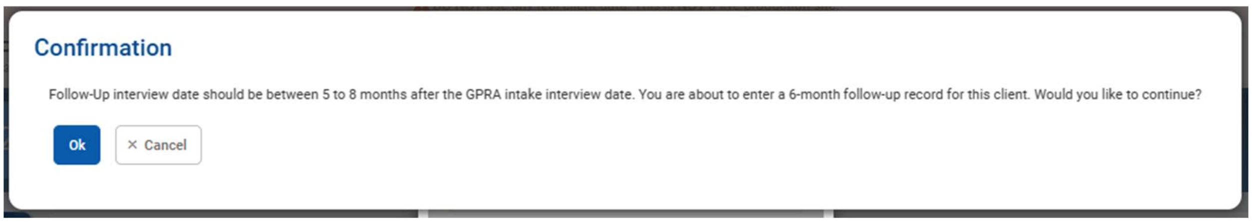
4. Select 6-month Follow Up for Interview Type and fill in the other required information. On the question, "Did you conduct an interview?", select "Yes" if the client was reached for an interview. Selecting "No" indicates an "administrative" GPRA is entered and will not contribute to your compliance rate.



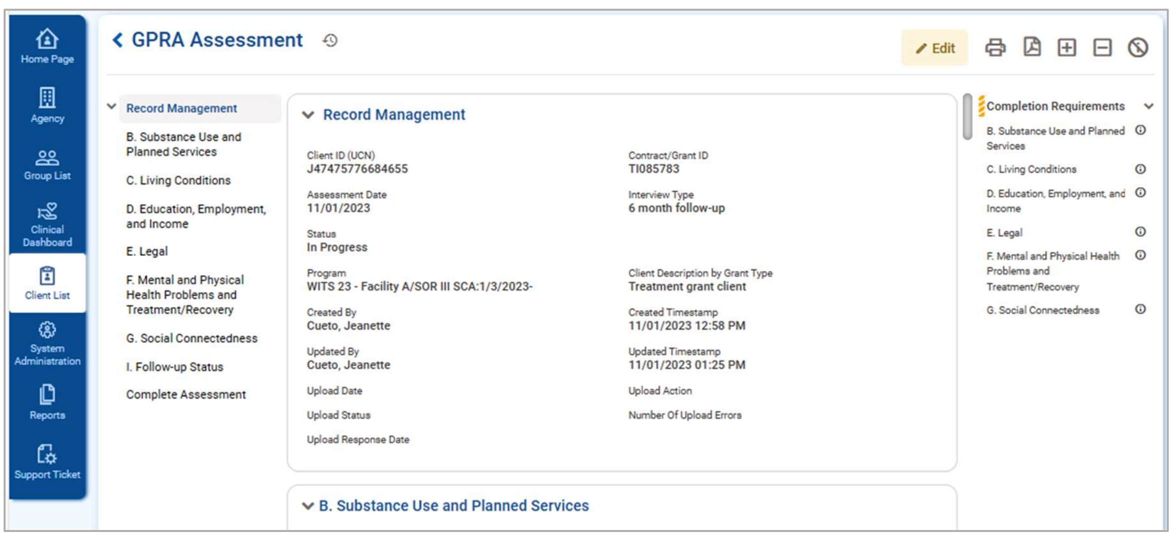
5. Confirmation questions vary depending on whether the GPRA Follow-up was done within the 5 to 8-month window or not. When it is within the follow-up window, the confirmation question message is: "You are about to enter a 6-month follow-up record for this client. Would you like to continue?" Select **OK** to start the follow-up interview.



When the Follow-up is not within the follow-up window, the confirmation message is "Follow-Up interview date should be between 5 to 8 months after the GPRA Intake Interview date. You are about to enter a 6-month follow-up record for this client. Would you like to continue?"



When the interview opens, complete the required fields.



6. Once all questions have been answered, scroll to the bottom for the Complete Assessment panel and then click **Complete**. This will lock the assessment,

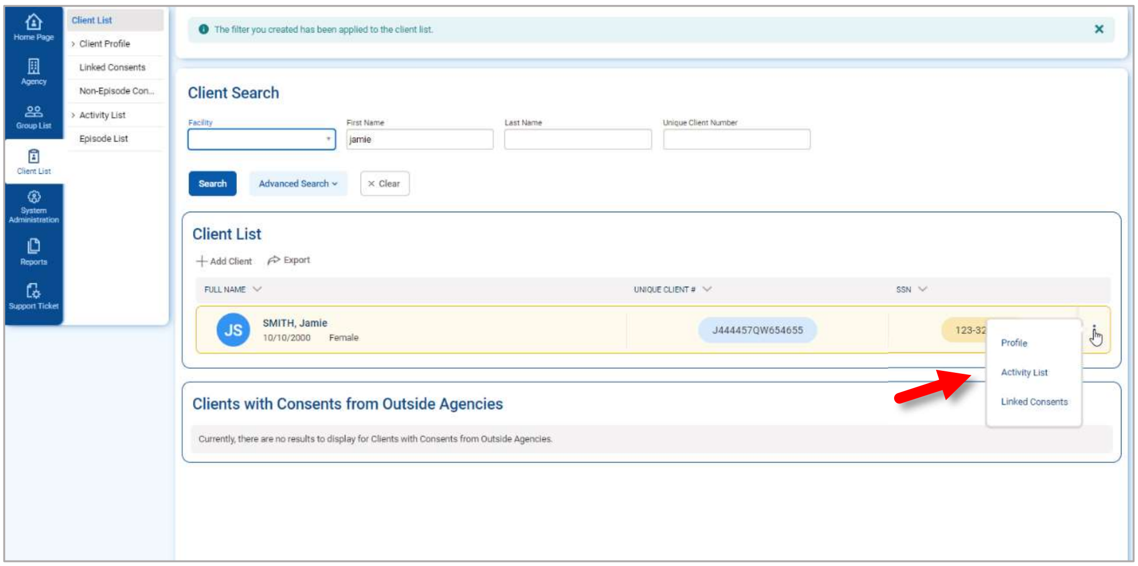
GPRA Discharge Interview

***Where:* Client List > Activity List > GPRA > GPRA Discharge**

To add a discharge record, follow the steps below.

> **Note**: If a Discharge interview has been conducted, **Sections A through G**, **J** and **K** must be completed.
>
> If the Discharge interview ***has not*** been conducted, **Sections A, J** and **K** must be completed.

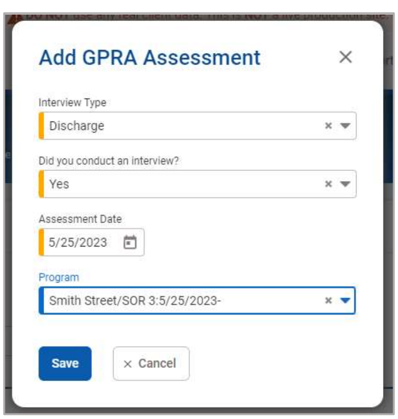
1. To access the GPRA interview, select a client from the **Client List**, point to the ellipsis icon in the Actions column, and then click **Activity List**.



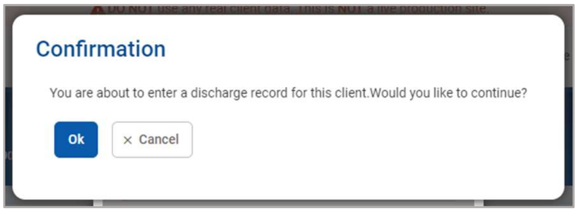
2. On the left menu, click **GPRA Assessment**.

3. On the GPRA List screen, click **+Create New GPRA**.

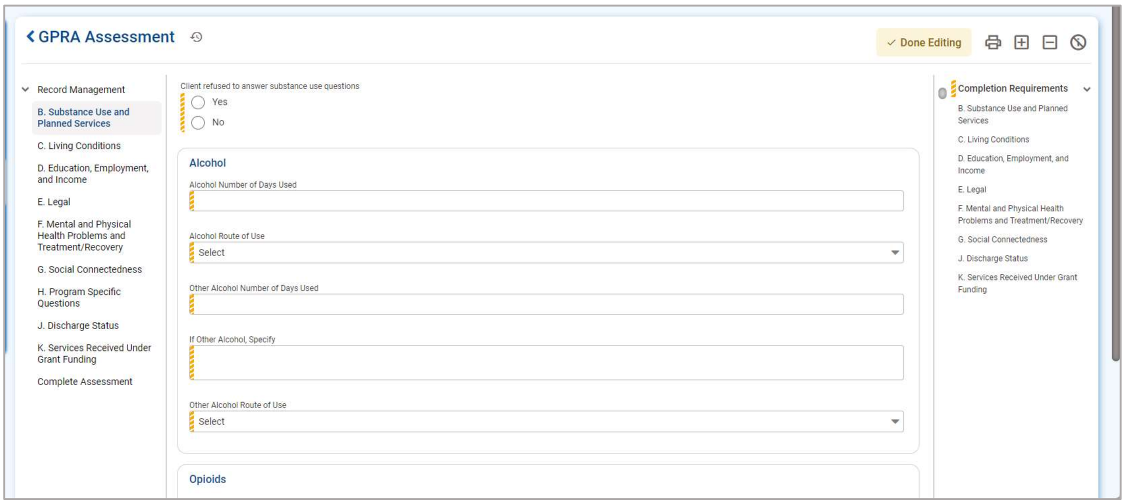
4. In the pop-up window, select GPRA Discharge for the interview type. Complete the required fields and click the **Save** button to progress to the next screen. If the interview was not conducted (answered "No" to the question "Did you conduct an interview?"), clicking the Save button will display Discharge Status.



5. Confirm you are about to enter a discharge record by clicking Ok.



6. Complete the required fields on the GPRA.



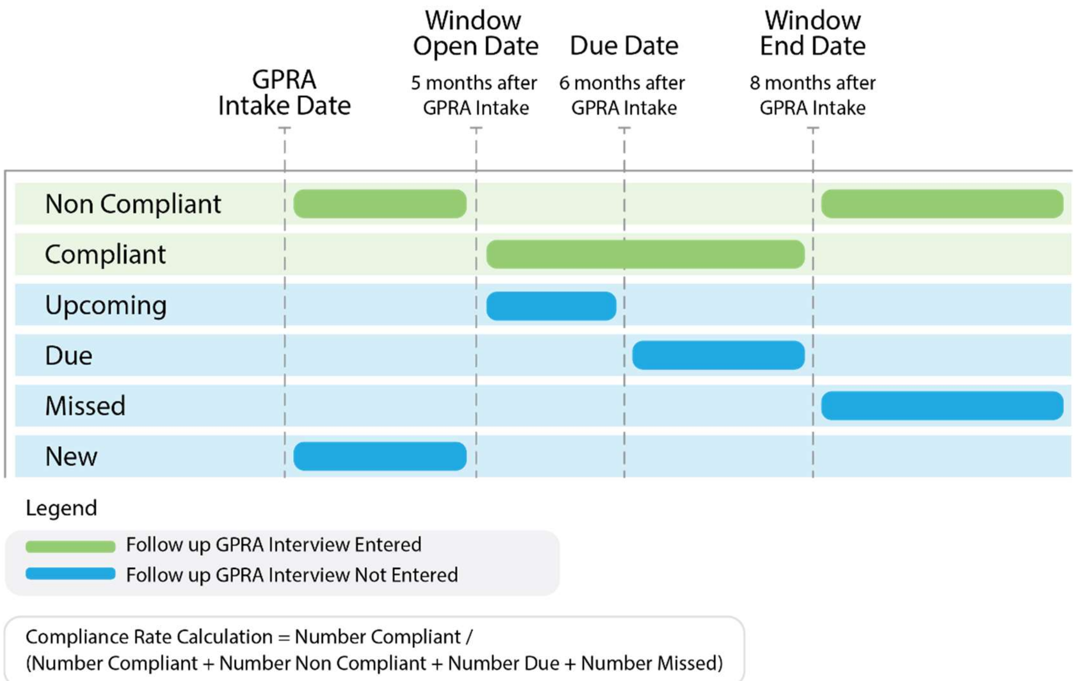
7. Once all questions have been answered, Click **Complete** at the bottom of the screen. This will lock the GPRA so that it will be included in the nightly upload to SPARS. Completing the assessment will also now show the user that completed the assessment and a time and date stamp.

8. Once completed, a read-only version will show, and you will be able to return to the GPRA Assessment page.

GPRA Interview Compliance Details

Grant Requirement

A GPRA Follow-up Interview must be completed with the client 6 months after the GPRA Intake Interview. There is a 3-month window to enter that follow-up interview in WITS and be in compliance with the grant program's requirement. The compliance window opens 5 months after the GPRA Intake Interview and ends 8 months after the GPRA Intake Interview.



Definitions for each follow-up status are included in the following table.

Term	Meaning
Compliant	GPRA Follow-up Interviews **entered** into WITS **during** the compliance window specified above are considered compliant. The GPRA follow up interview must be conducted (Was the GPRA interview conducted = Yes) and the interview date must be within the window.
Non-Compliant	GPRA Follow-up Interviews **entered** into WITS **outside** of the compliance window specified above are considered non-compliant. This count also includes GPRA Follow-up records that are entered in the system but were not conducted (with no interview date, Was the GPRA interview conducted = No).
Upcoming	Clients with no follow-up interview who have a GPRA intake Interview dated between 5 and 6 months ago (for 6-month follow up) are part of the **Upcoming** count.
Due	Corresponds to the number of clients who have reached the due date (6 months) and do not yet have a GPRA Follow-up Interview record in WITS. This count does not consider the clients who have a corresponding GPRA Discharge Interview with a termination of "Death, Unknown" and "Death, Cause known". This would cover a scenario where a client died before the follow-up became due.
Missed	The clients who do not have a GPRA Follow-up Interview entered into WITS after the end of the window are a part of the **Missed** count.
New	The Clients who have a GPRA intake Interview, no GPRA Follow-up Interview, and who have not entered in a follow up window yet, are a part of the **New** count.

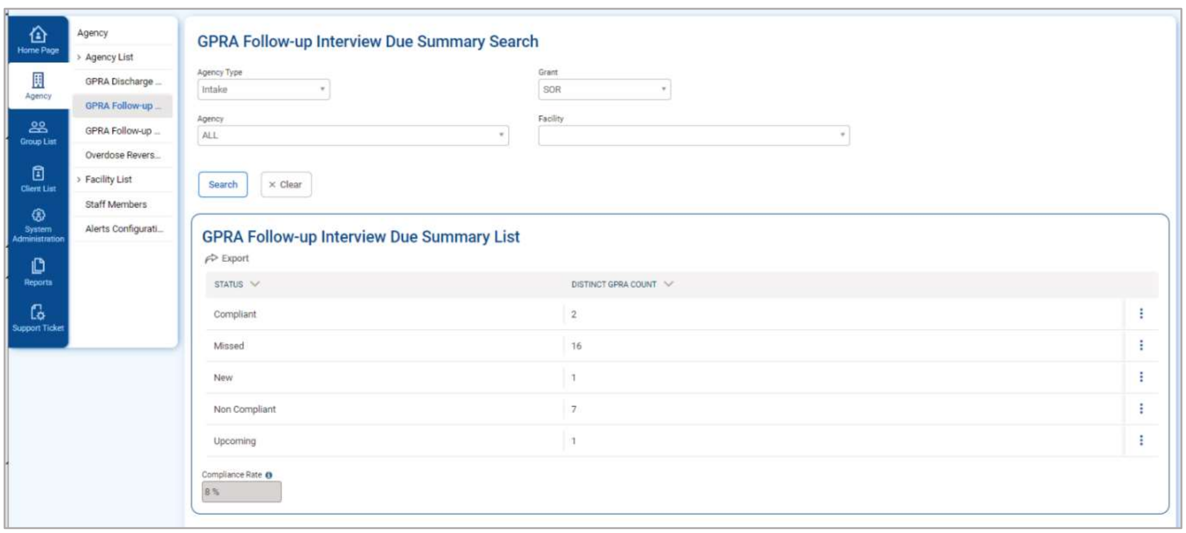
GPRA Follow-up Due Summary Screen

***Where:* Agency > GPRA Follow-up Due Summary**

The **GPRA Follow-up Due Summary** screen displays a summary view of where an agency stands with their follow up interviews and includes the agency's compliance rate. Users can select from the available search fields and click **Go** to view the search results. Information on these search fields is listed in the table below.

The search results will display a distinct count of GPRA interviews for each follow-up status available at the time of searching.

Field	Description
Agency Type	In the **Agency Type** search field, the option "**Intake**" represents the agency where the GPRA Intake Interview was conducted. The option, "**Follow-up**" represents any agency where the GPRA follow-up interview can be or has been conducted.
Grant	This required field will be a drop down where the SOR IV grant can be selected.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.



Detailed information for each interview status can be seen by hovering over ellipsis icon on the right, then clicking **Details**. The system will then display the GPRA Follow-up Due Detail screen, showing the clients for the selected interview status and the current search criteria. The GPRA Follow-up Due Detail screen is covered in the next section.

GPRA Follow-up Due Detail Screen

Where:* *Agency* > *GPRA Follow-up Due Detail

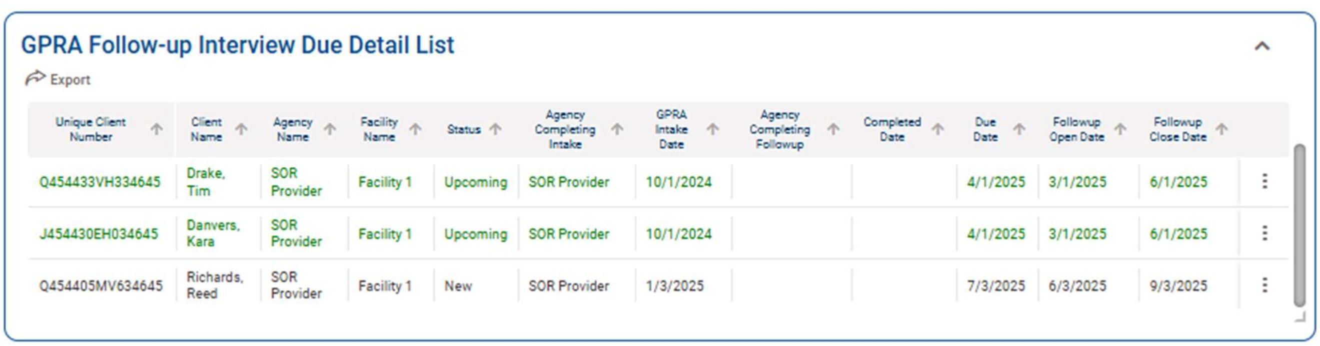
The **GPRA Follow-up Due Detail** screen displays a list of client records with information regarding the clients' GPRA interview status. Staff members can use the available search fields and click **Go** to view the results.

Field	Description
Agency Type	In the **Agency Type** search field, the option "**Intake**" represents the agency where the GPRA Intake Interview was conducted. The option, "**Follow-up**" represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be a drop down where the SOR IV grant can be selected.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.
Status	The **Status** search field will filter the list of clients corresponding to a specific compliance status. For definitions of each status, see ***Error! Reference source not found.*** **Error! Bookmark not defined. Error! Reference source not found.**.

If the staff member was redirected to this screen by clicking the "**Details**" link on the GPRA Follow-up Due Summary screen, the Agency Type, Agency, Facility and Grant, search fields and Status will be prepopulated with the options entered on the Summary screen. The following informational message will also be displayed, *"The records on this list may not match the total from the summary because you may not have access to some clients."*

Note: Since the GPRA Follow-up Due Detail screen includes client names, the search results displayed in the list are filtered to only include clients that the staff member has access to.

The records on this list may not match the total from the summary because you may not have access to some clients.



GPRA Follow-up Interview Due Detail List

Export

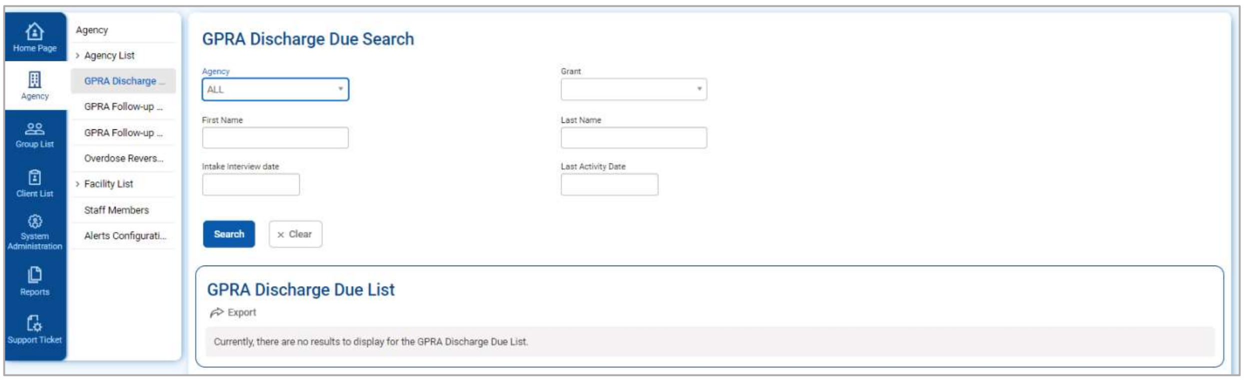
Unique Client Number	Client Name	Agency Name	Facility Name	Status	Agency Completing Intake	GPRA Intake Date	Agency Completing Followup	Completed Date	Due Date	Followup Open Date	Followup Close Date
Q454433VH334645	Drake, Tim	SOR Provider	Facility 1	Upcoming	SOR Provider	10/1/2024			4/1/2025	3/1/2025	6/1/2025
J454430EH034645	Danvers, Kara	SOR Provider	Facility 1	Upcoming	SOR Provider	10/1/2024			4/1/2025	3/1/2025	6/1/2025
Q454405MV634645	Richards, Reed	SOR Provider	Facility 1	New	SOR Provider	1/3/2025			7/3/2025	6/3/2025	9/3/2025

GPRA Discharge Due Screen

Where:* *Agency > GPRA Discharge Due

The **GPRA Discharge Due** screen displays at the Agency level, clients with a GPRA Intake interview date greater than 30 days ago and the client has no encounter, or their most recent encounter is 30 days ago. Users can select from the available search fields and click **Go** to view the search results. In the **Actions** column, clicking the "**View Client**" link will redirect to the client's GPRA list screen if the staff member is currently in the same context agency as the client.

Field	Description
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **All Agency Access** roles, then this field will display all the agencies.
Grant	This required field will be a drop down where the SOR IV grant can be selected.



Note: Since the GPRA Discharge Due screen includes client names, the search results displayed in the list are filtered to only include clients that the staff member has access to.

Part 5: Consent and Referrals

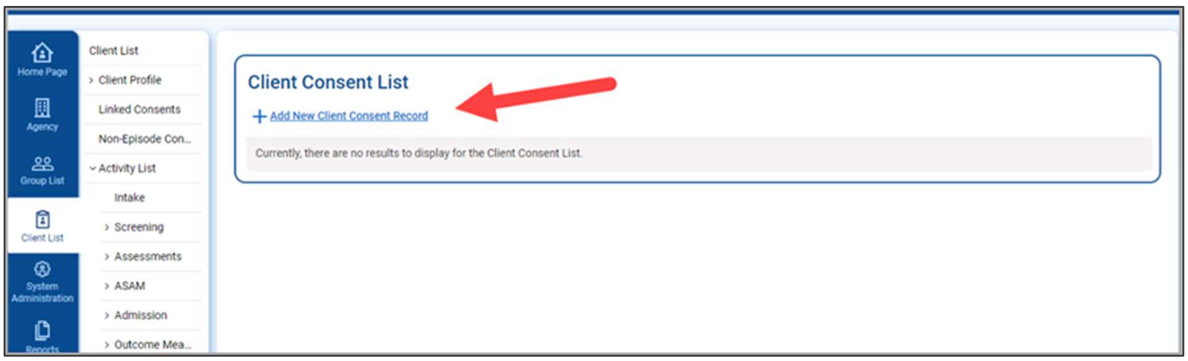
Consent

Create Client Consent Record

***Where:* Client List > Activity List > Consent**

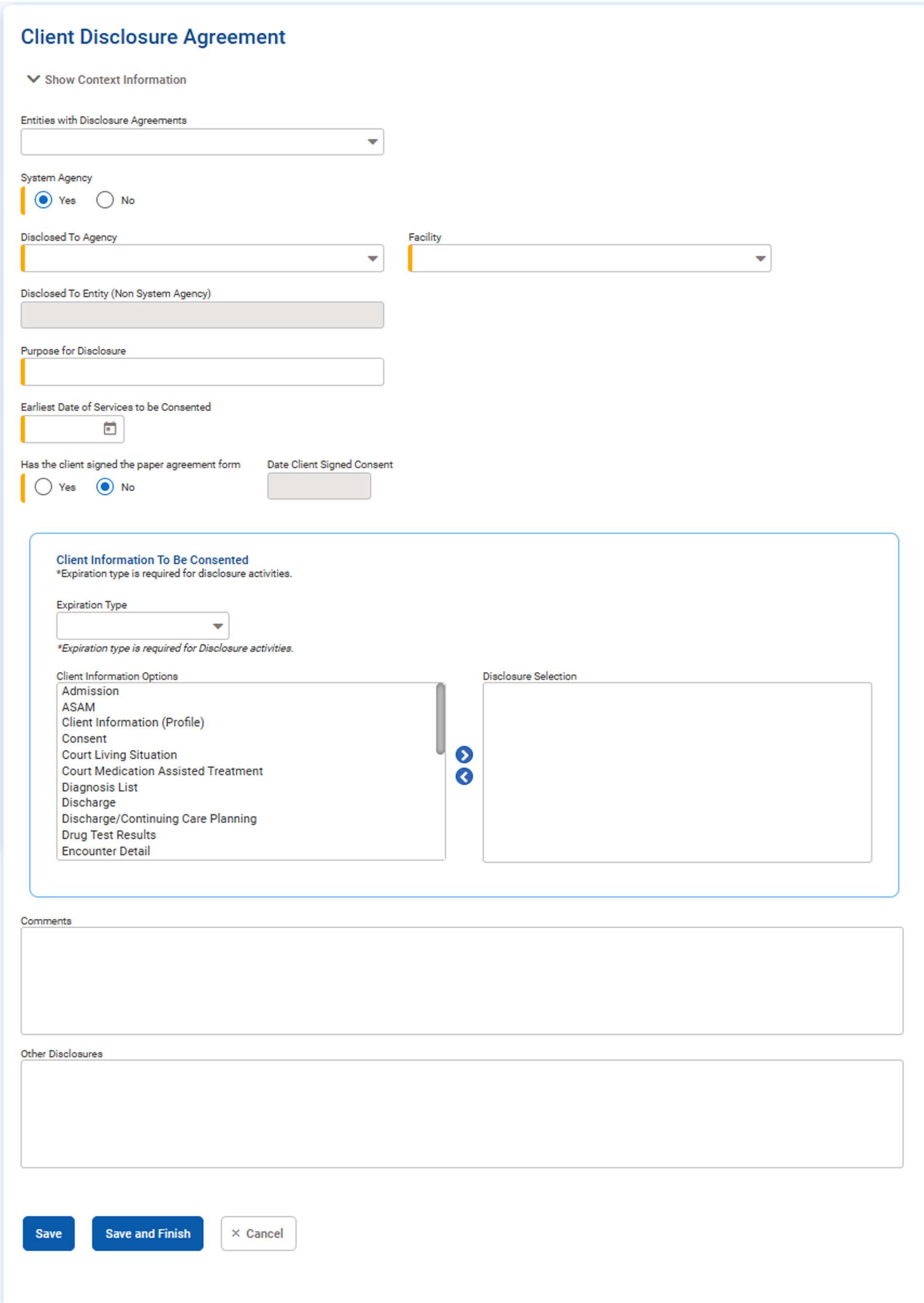
The consent is a formal process adhering to 42 CFR Part 2, which governs the sharing of client information between agencies and facilities using WITS. A consent may also be used to record the sharing of information (on paper) with agencies who do not use WITS, making the consent part of the electronic health record.

1. On the left menu, click **Client List** and search for a client.
2. Locate the client, hover over the Actions column, and then click **Activity List**.
3. On the left menu, click **Consent**.
4. Click the **Add New Client Consent Record** link. When asked if it is related to a waitlist record, select No.



5. On the Client Disclosure Agreement screen, complete the following fields.

Field	Description
Entities with Disclosure Agreements	Select from the drop-down list. This field will display a list of agencies that have previously created a Disclosure template. This will prepopulate fields in the "Client Information To Be Consented" section, which can then be modified if needed.
System Agency	Select "Yes" if the agency uses WITS.
Disclosed to Agency	Select the agency that will be receiving the client's information.
Facility	Select the facility within the selected Agency that will be receiving the client's information. Select All Facilities, or an individual facility.
Purpose for Disclosure	Type the reason for creating the Consent record.
Earliest date of services to be consented	Select the date.
Has the client signed the paper agreement form	Select "No" to save the screen and have the client sign the paper form (see below), after client has signed, select "Yes".
Date client signed consent	This field will become editable when "Yes" is selected in the previous field.

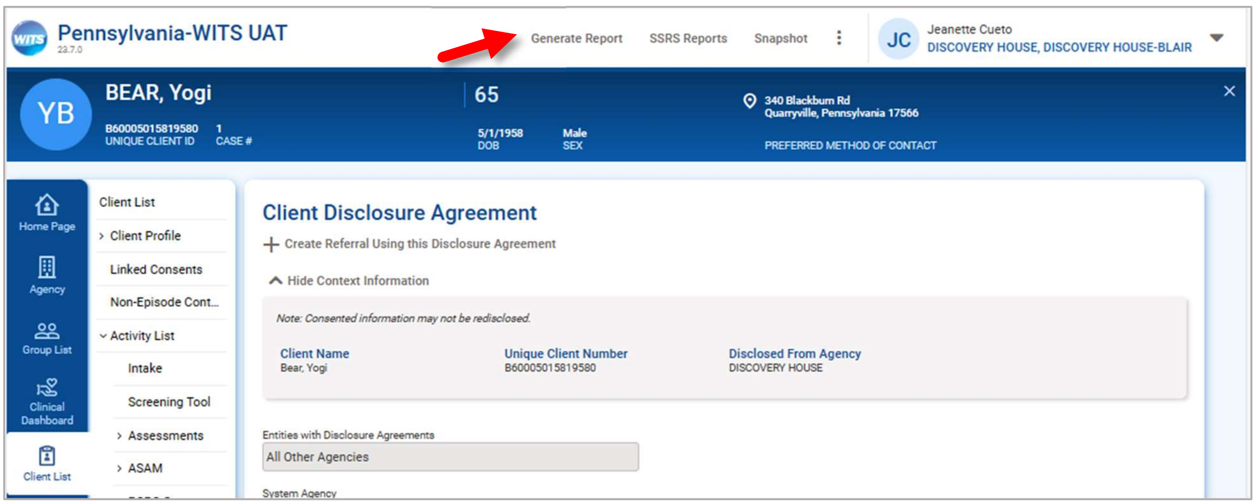


Client Disclosure Agreement
Show Context Information
Entities with Disclosure Agreements
System Agency
Yes
No
Disclosed To Agency
Facility
Disclosed To Entity (Non System Agency)
Purpose for Disclosure
Earliest Date of Services to be Consented
Has the client signed the paper agreement form
Yes
No
Date Client Signed Consent
Client Information To Be Consented
*Expiration type is required for disclosure activities.
Expiration Type
*Expiration type is required for Disclosure activities.
Client Information Options
Admission
ASAM
Client Information (Profile)
Consent
Court Living Situation
Court Medication Assisted Treatment
Diagnosis List
Discharge
Discharge/Continuing Care Planning
Drug Test Results
Encounter Detail
Disclosure Selection
Comments
Other Disclosures
Save
Save and Finish
Cancel

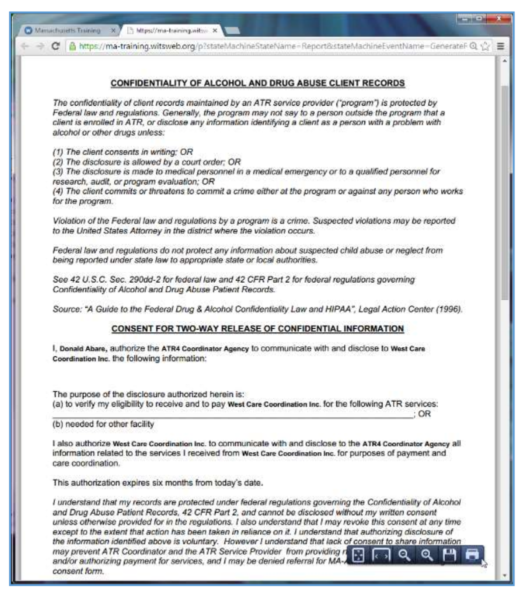
7. If additional consent information needs to be added or removed from the client's disclosure agreement, update the options from the "Client Information To Be Consented" section. Your agency administrator may have set up templates for the disclosure agreement.

Field	Description
Expiration Type and + Days	Select either "Discharge (UD)" or "Date Signed (DS)", then when the yellow field appears, enter the number of days the consent will expire.
Client Information Options/Disclosure Selection	Select options from the box and use the mover buttons to add or remove the desired consent options.

8. When all required fields are complete, click **Save**.
9. After saving the Client Disclosure Agreement screen, click the **Generate Report** link to print the Client Consent Form to get the client's signature on the paper copy. The printed consent form includes items from the Client Information Options box along with the Consent Expires information.



10. Once the client has signed the paper form, update these fields:
    - **Has client signed the paper agreement form**: select "Yes"
    - **Date client signed consent**: defaults to current date
11. Click **Save** and stay on this screen (notice the fields are now grayed out).
12. After saving the client consent, a link to add a Client Referral for this consent will be available. This will open the client referral screen, and will pre-populate the signed consent and Agency fields of the Referred to section.
13. Click the link, **Create Referral Using this Disclosure Agreement**, and continue to the next section.



CONFIDENTIALITY OF ALCOHOL AND DRUG ABUSE CLIENT RECORDS

The confidentiality of client records maintained by an ATR service provider ("program") is protected by Federal law and regulations. Generally, the program may not say to a person outside the program that a client is enrolled in ATR, or disclose any information identifying a client as a person with a problem with alcohol or other drugs unless:

(1) The client consents in writing; OR
(2) The disclosure is allowed by a court order; OR
(3) The disclosure is made to medical personnel in a medical emergency or to a qualified personnel for research, audit, or program evaluation; OR
(4) The client commits or threatens to commit a crime either at the program or against any person who works for the program.

Violation of the Federal law and regulations by a program is a crime. Suspected violations may be reported to the United States Attorney in the district where the violation occurs.

Federal law and regulations do not protect any information about suspected child abuse or neglect from being reported under state law to appropriate state or local authorities.

See 42 U.S.C. Sec. 290dd-2 for federal law and 42 CFR Part 2 for federal regulations governing Confidentiality of Alcohol and Drug Abuse Patient Records.

Source: "A Guide to the Federal Drug & Alcohol Confidentiality Law and HIPAA", Legal Action Center (1996).

CONSENT FOR TWO-WAY RELEASE OF CONFIDENTIAL INFORMATION

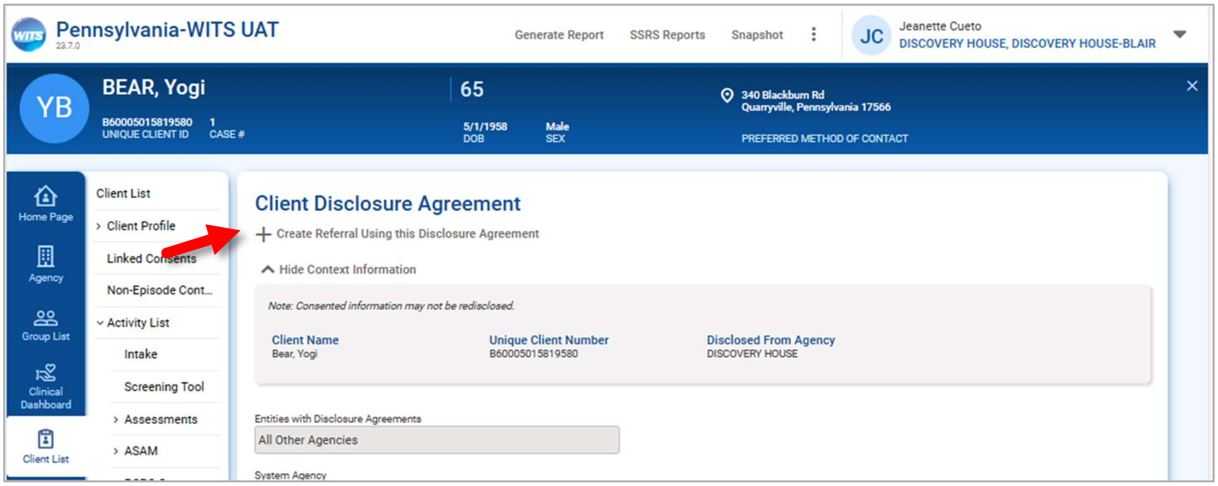
I, **Donald Abare,** authorize the **ATR4 Coordinator Agency** to communicate with and disclose to **West Care Coordination Inc.** the following information:

The purpose of the disclosure authorized herein is:
(a) to verify my eligibility to receive and to pay **West Care Coordination Inc.** for the following ATR services: ____; OR
(b) needed for other facility

I also authorize **West Care Coordination Inc.** to communicate with and disclose to the **ATR4 Coordinator Agency** all information related to the services I received from **West Care Coordination Inc.** for purposes of payment and care coordination.

This authorization expires six months from today's date.

I understand that my records are protected under federal regulations governing the Confidentiality of Alcohol and Drug Abuse Patient Records, 42 CFR Part 2, and cannot be disclosed without my written consent unless otherwise provided for in the regulations. I also understand that I may revoke this consent at any time except to the extent that action has been taken in reliance on it. I understand that authorizing disclosure of the information identified above is voluntary. However I understand that lack of consent to share information may prevent ATR Coordinator and the ATR Service Provider from providing [illegible] and/or authorizing payment for services, and I may be denied referral for MA-[illegible] consent form.


Pennsylvania-WITS UAT
Generate Report
SSRS Reports
Snapshot
Jeanette Cueto
DISCOVERY HOUSE, DISCOVERY HOUSE-BLAIR
BEAR, Yogi
65
340 Blackburn Rd
Quarryville, Pennsylvania 17566
B60005015819580
UNIQUE CLIENT ID
1
CASE #
5/1/1958
DOB
Male
SEX
PREFERRED METHOD OF CONTACT
Home Page
Agency
Group List
Clinical Dashboard
Client List
Client List
Client Profile
Linked Consents
Non-Episode Cont...
Activity List
Intake
Screening Tool
Assessments
ASAM
Client Disclosure Agreement
Create Referral Using this Disclosure Agreement
Hide Context Information
Note: Consented information may not be redisclosed.
Client Name
Bear, Yogi
Unique Client Number
B60005015819580
Disclosed From Agency
DISCOVERY HOUSE
Entities with Disclosure Agreements
All Other Agencies
System Agency

Referrals

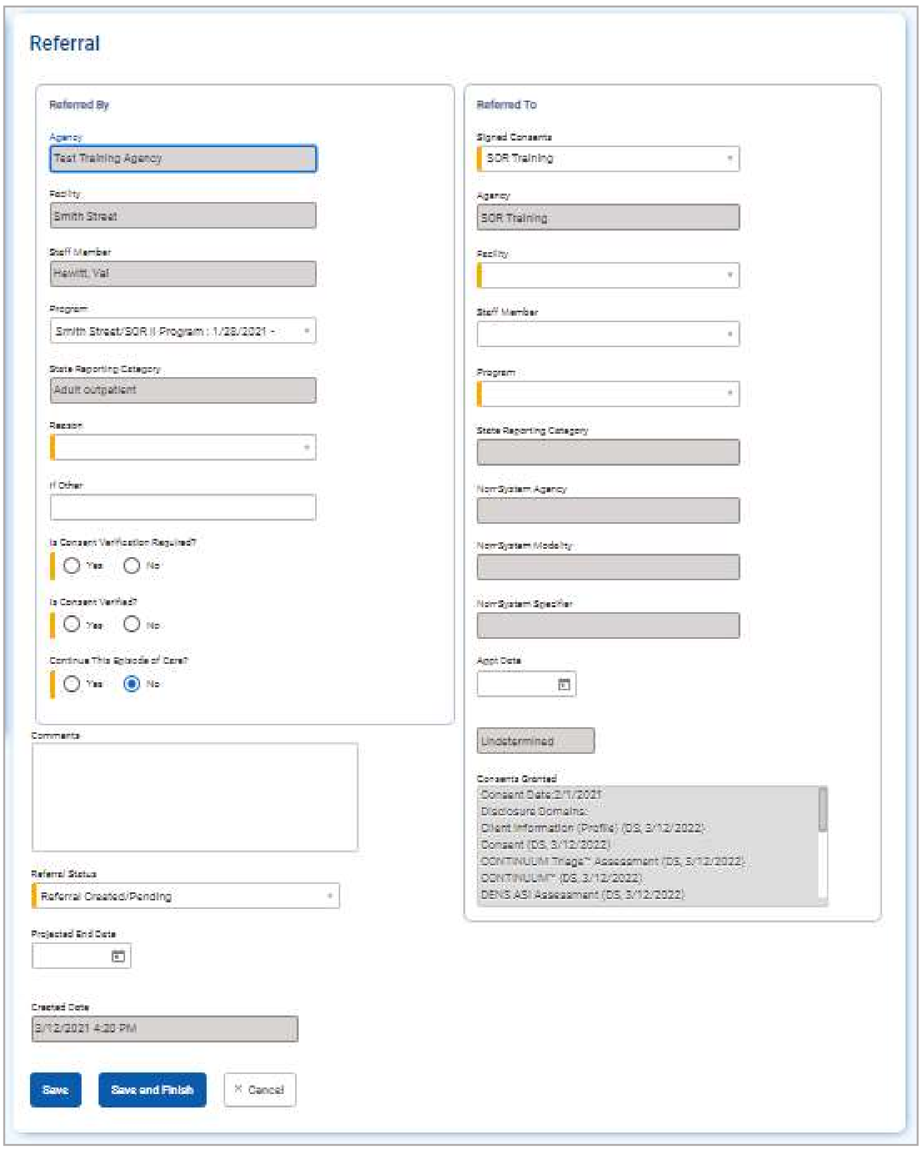
Create a Client Referral

***Where:* Client List > Activity List > Referrals**

Continuing from the previous section…

Once the Client Consent is complete, create the Client Referral Record. A referral is used when the receiving agency (another WITS agency) will be providing services for the client. Referrals may also be made from one facility to another facility within the same agency.

1. After clicking the **Create Referral Using this Disclosure Agreement** link, the Referral screen will open.



2. On the Client Referral screen, complete the required fields in the **Referred By** section, including:

Field	Description
Program	Select the Program. It should be a referral from a SOR IV program to another SOR IV program.
Reason	In the drop-down field, select the reason why this client is being referred.
Is Consent Verification Required?	Select Yes.
Is Consent Verified?	Select Yes.
Continue Episode of Care?	Select Yes.
Referral Status	State of the referral (this should be "Referral Created/Pending").
Created Date	Date client is referred.

Note: To link the program enrollment of the client from the Referred By agency to the Referred To agency, the program fields on both sides should be a SOR IV program. The response to the question 'Continue Episode of Care?' should be 'Yes'.

3. Next, in the **Referred To** section, complete all the required fields, including:

Field	Description
Signed Consents	Select the consent from list of available consents.
Agency	This field will auto populate based on the "Consent" selected.
Facility	The facility the client is being referred to.
Program	The program the client is being referred to. It should be an SOR IV program.

4. When complete, click **Save**.

Viewing Referrals

Referrals In

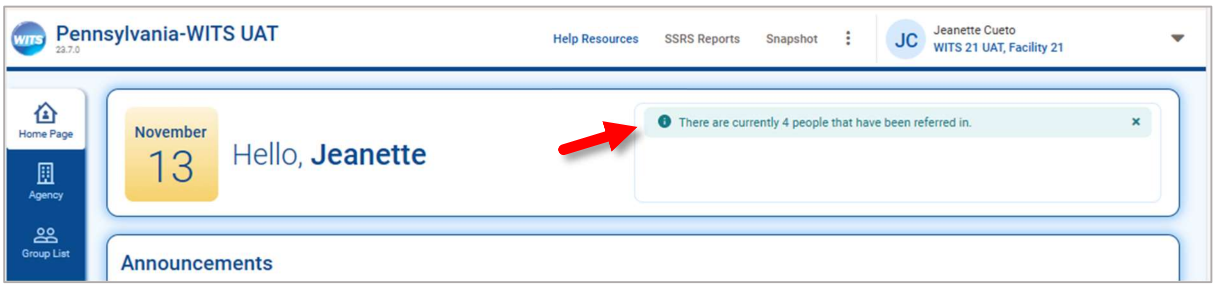
Where: Agency > Agency List > Referrals > Referrals In

Whenever clients are referred into your agency from another agency, a message will appear on the Home Page. Clients who have been referred in have signed a consent form agreeing to share certain information with your agency. To review these referrals, follow the steps below.

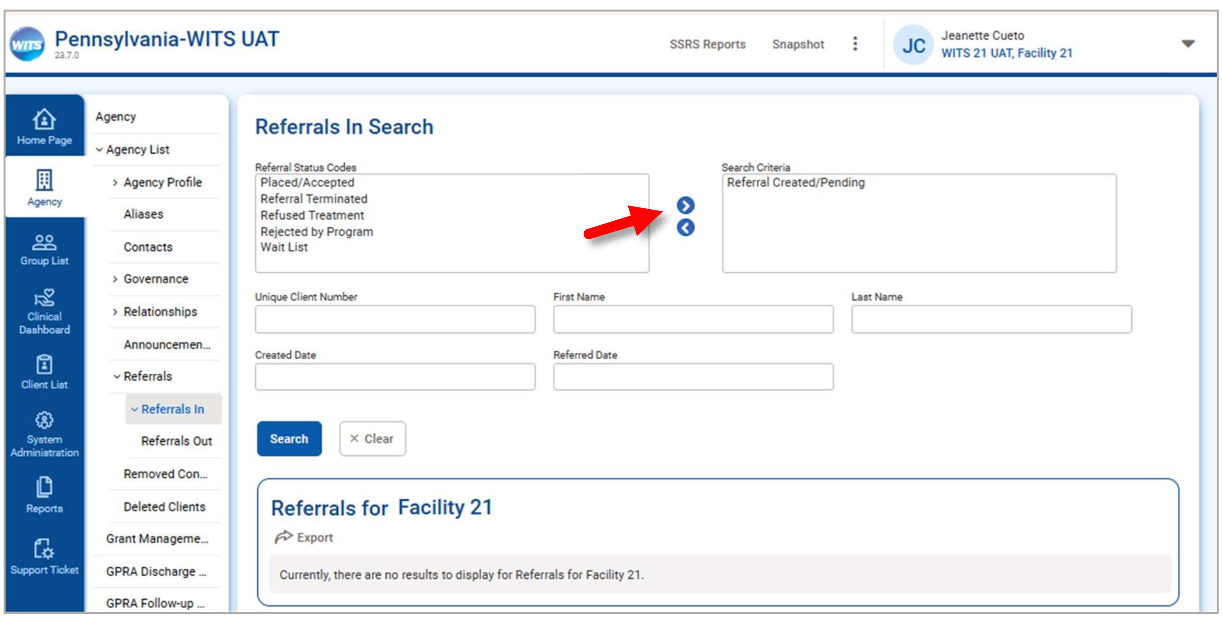
Role Needed:

- Referrals (Full Access)

Note: Only users with the Referrals (Full Access) role will see the Referrals link on the left menu.



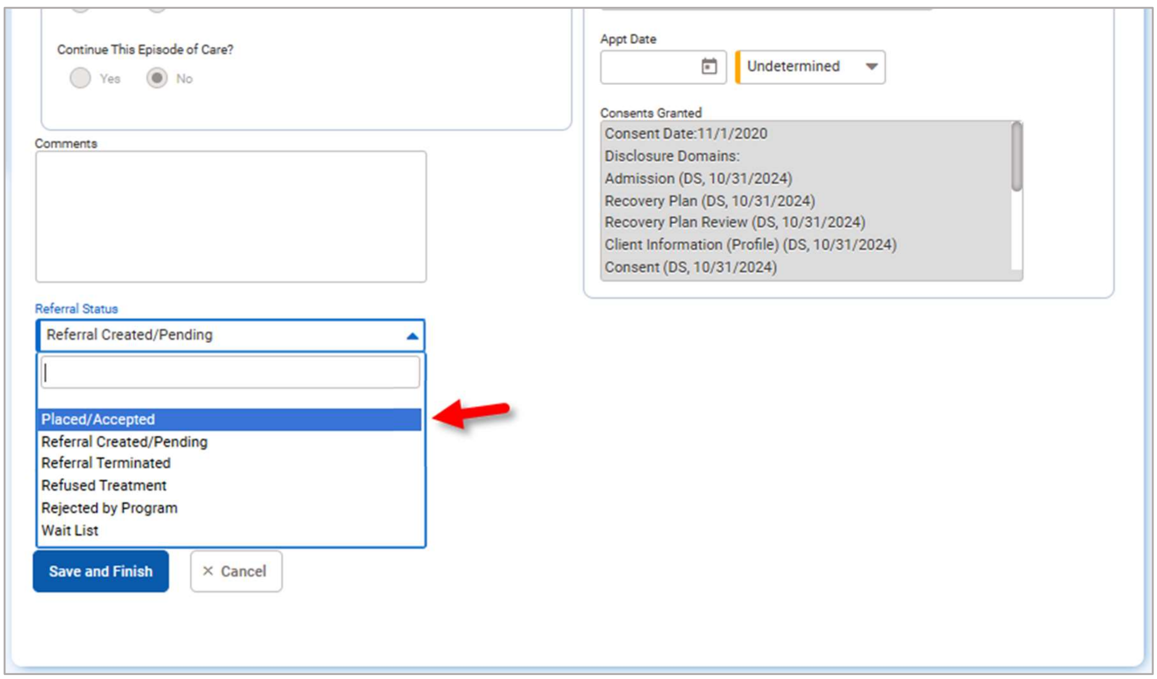
1. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals In**.
2. On the **Referrals In Search** screen, in the **Referral Status Codes** field, select “**Referral Created/Pending**” and move this option to the **Search Criteria** box by clicking the mover button.



3. After selecting the search criteria, click **Search** to view the search results list.

4. Notice that any referred clients will appear in the list portion of the screen. To view a client's referral information, hover over the Actions column, and then click **Review**.

5. To accept the client referral, click on the **Referral Status** field and select "**Placed/Accepted**" from the drop-down list. The client must be accepted into your agency before viewing the client's record, or working on the case.



6. (Optional) Next, fill in the **Appointment Date (Appt Date)** and use the drop down box to provide any additional information about the appointment.

7. Click **Finish** to save the record and accept the referral. Note that this action takes you to the Client Profile screen for the client you just accepted.

(Optional) Additional **Referral Status** reasons to select:

- **Referred/Terminated**: When the referral has been deleted by the referring agency.
- **Refused Treatment**: Select if the client does not want to be treated.
- **Rejected by Program**: If the client is not eligible or is not acting in compliance.
- **Wait List**: If the client is waiting for a slot to open in the program.

Note: Once the referral is Placed/Accepted, the client record is created within the Agency, and an Intake and Client Program Enrollment is created within the referred to Facility.

Referrals Out

Where: Agency > Agency List > Referrals > Referrals Out

The Referrals Out screen is used to check the status of referrals made from your agency to other agencies.

1. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals Out**.
2. On the **Referrals Out Search** screen, in the **Referral Status Codes** field, select the desired codes and move them to the **Search Criteria** box by clicking the mover button (>).
3. After selecting the search criteria, click **Go** to view the search results list.