KORE Workflow and Tips

Client Profile → **Intake** → **Program Enrollment** → **GPRA Intake** → **GPRA 6 Month Follow up** → **GPRA Discharge** → **Close Program Enrollment and Intake**

Search for a Client

Client List

1. Click **Client List** on the left side of WITS and by the desired search field (eg. Last Name, UCN).
2. Click **Go**.
3. If client is found, hover over the ellipsis ⋮ to access links to the client's information.

Add a New Client

Client List

1. Click **Client List on** the left menu of WITS.
2. Click **Add New Client** on the Client Search page.
3. Fill out the information for the new client.
4. Click **Save.**

Add Additional Client Information

Client Profile

1. After completing client profile information, click the **Next** button arrows next to the finish button.
2. Fill out the information on each additional screen and save to complete the client information.
3. Click the blue circle with the double white arrow to move the next screen.
4. Click **Save and Finish** when complete to return to the **Client List**.

Add a New Episode

Client Profile> Episode List

1. From your **Client Profile**, click **Episode List.**
2. Click **Start New Episode** .
3. Fill out the information for the episode.
4. Click **Save and Finish**.

Record a Program Enrollment

Client Profile> Activity List.> Program Enroll

1. From your **Client Profile,** click **Activity List,** then **Program Enroll**.
2. Click **New Program Enrollment**.
3. Fill out the information for the SOR grant program enrollment.
4. Click **Save and Finish**.

> ⚠️
> # WARNING
>
> Fields that have Orange indicators to the left of text boxes are required, and the page cannot be saved until the field is completed.
>
> Last Name

Record the GPRA Intake

Client Profile> Activity List> GPRA Assessment

1. Click on **Activity List**> **GPRA.**
2. Click **+ Create New GPRA Assessment**
3. On the Pop up, select **Intake** for the assessment type, and fill out the rest of the information. Click **Ok.**
4. Fill out the information for the GPRA.
5. At the bottom of the screen click **Complete.**
6. Confirm that you would like to complete and lock the assessment by clicking **Ok.**

Record the GPRA Follow up

Client Profile> Activity List> GPRA Assessment

Note: the follow up must be recorded between 5-8 months after the GPRA Intake per SOR grant require-ments.

1. Click on **Activity List**> **GPRA.**
2. Click **+ Create New GPRA Assessment**
3. In the pop up, select **GPRA Intake** for Assessment Type and fill out the rest of the information. Click **Ok.**
4. Fill out the information for the GPRA.
5. At the bottom of the screen click **Complete.**
6. Confirm that you would like to complete and lock the assessment by clicking **Ok.**

Record the GPRA Discharge

Client Profile> Activity List> GPRA Assessment

1. Click on **Activity List**> **GPRA.**
2. Click **+ Create New GPRA Assessment**
3. In the pop up, select **Discharge** for Assessment Type. Fill out the rest of the information. Click **Ok.**
4. Fill out the information for the GPRA.
5. At the bottom of the screen click **Complete.**
6. Confirm that you would like to complete and lock the as-sessment by clicking **Ok.**

Generate GPRA Interview Report/ Print GPRA Interview

Client Profile> Activity List> GPRA Assessment

1. **Click** on **Activity List**> **GPRA Assessment**
2. Hover over the for the ellipsis icon GPRA interview> **View**
4. Click the printer icon in the upper right corner of the screen.
5. Print the page per your browser instructions.

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Edit a GPRA Assessment

Client Profile> Activity List> GPRA Assessment

1. Hover over the ellipsis next to the GPRA Assessment to edit and click **Review**.
2. Scroll down to the bottom of the screen and click **Unlock**.
3. Confirm that you would like to unlock on the pop up by clicking **Ok.**
4. Make edits to the GPRA Assessment.
5. When edits are complete, click **Lock** at the bottom of the screen.
6. Confirm that you would like to complete and lock the assessment by clicking **Ok.**

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WARNING

If a GPRA Assessment is unlocked and edited, it **MUST be locked again** when changes are com-plete. If it is not locked, the changes will not be included in the nightly upload to SPARS.

Dis-Enroll in SOR Program

Client Profile> Activity List> Program Enroll

1. Access your Client's **Client Activity List.**
2. Click **Program Enroll.**
3. Hover over the pencil icon to the left of the pro-gram enrollment.
3. Click **Review.**
4. Put in the end date in the **End Date** field.
5. Click **Save and Finish.**

End Episode of Care

Client Profile> Activity List> Intake

1. Access your Client's **Client Activity List.**
2. Click **Intake**
3. 4. Put in the end date in the **Date Closed** field.
5. Click **Save** & Close the Case
6. Click **Save and Finish.**