SOR 3 User Guide

SOR III Grant User Guide

WITS Customers

Last Updated May 2023

Version 1

Customer Name

SOR III Grant

Preface

SOR III 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 Standard SOR III user guide has been prepared for provider agency staff members delivering SOR III services to individuals. Information included will assist providers in understanding the standard WITS SOR III system and the data entry requirements for the SOR III grant.

Note: Screen captures, and other information included in this Standard SOR III 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.

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.

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.

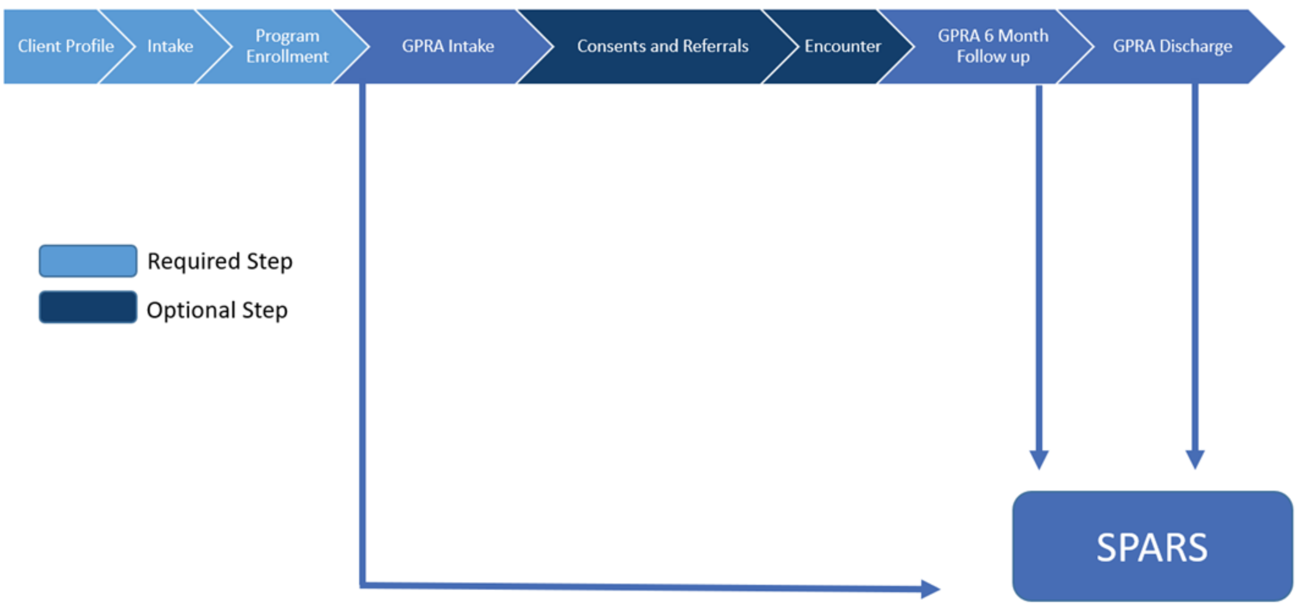
Part 1: WITS Information

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

- The initial provider agency that works with an individual will create the client profile, intake, and enroll the client into a SOR III 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 III 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 III program. Also, if the providers have entered encounters, WITS will map those encounters to the SOR III discharge GPRA.

Workflow Diagram

The following diagram illustrates the standard SOR III 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. If the same type of GPRA is sent twice (for example, if two GPRA Intakes are completed), SPARS will inactivate the first GPRA Intake interview when the second is completed. In order to prevent older interviews being inactivated in error, WITS has a grant episode.

Grant Episode Concepts

Event	Information
GPRA Menu Item	The ability to enter a GPRA in WITS only becomes available when a WITS client program enrollment (CPE) exists where the associated program has a value in the Grant field and the end user has the GPRA (Full Access) security access role.
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 the Client Program Enrollment (CPE) is created for a program with a Grant field value. 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)

WITS Administrator Process

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 III 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 to contact their WITS Administrator with the client's information.

There is a problem creating this client record. Please contact your system administrator to resolve this conflict."

2. The WITS Administrator ill then be able to determine if the client can be added within the agency by either continuing the existing episode or creating a new episode (which will inactivate the previous episode).

Part 2: Client Setup

Search for a Client

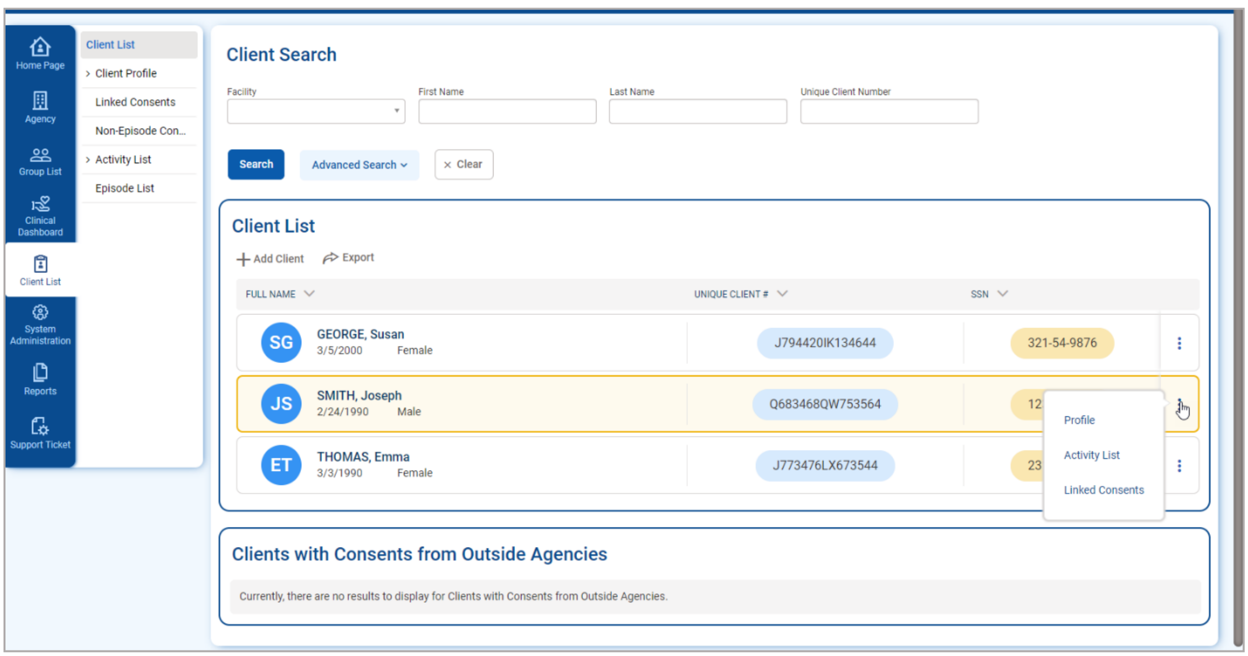
Where: Client List Screen

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** 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 other field) followed by a "*". 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, view their profile by pointing to the three dots icon in the Actions column and clicking the **Profile** link. If you do not find your client, you can create a new client record.

Client Search Tips

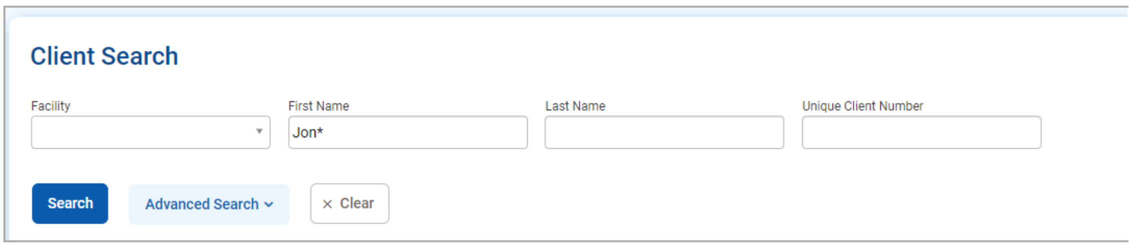
Client Name or Number

Use a client's nickname or alternate names in the **First Name** or **Last Name** fields.

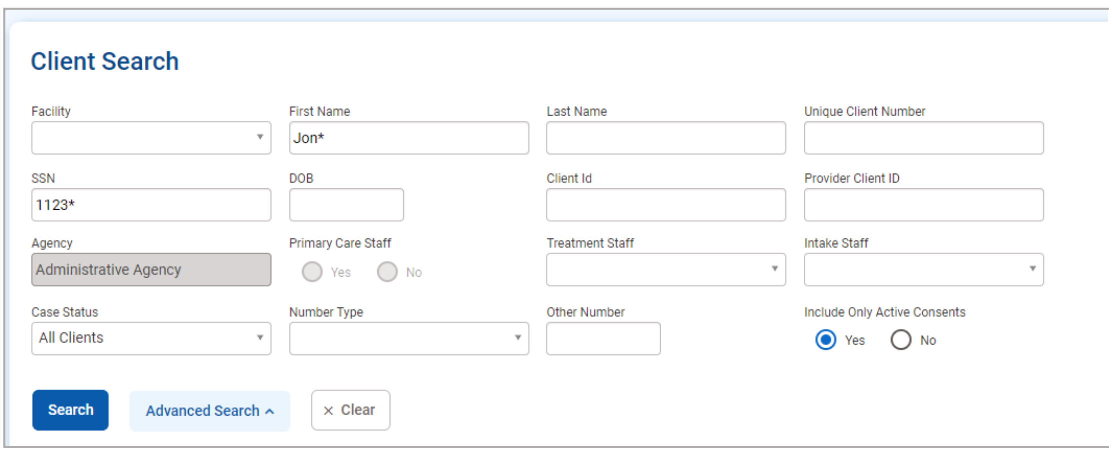
Use an **asterisk** (*) to perform a wildcard search.

Examples:

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



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



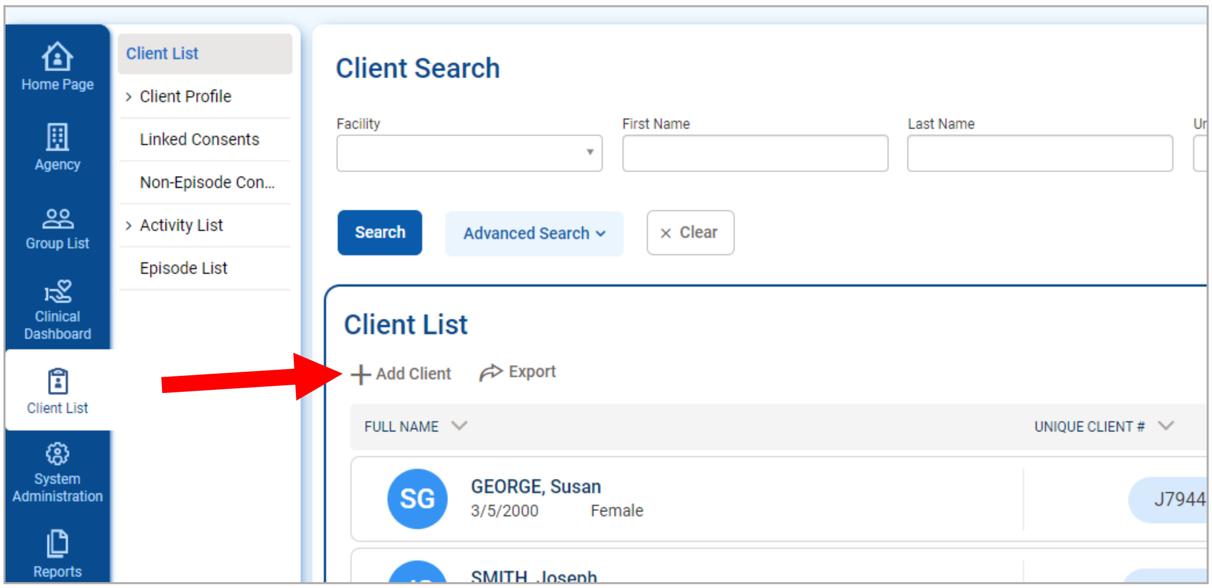
Create Client Profile

Where: Client List > Client Profile

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

Note: Please search for each client before creating a new record.

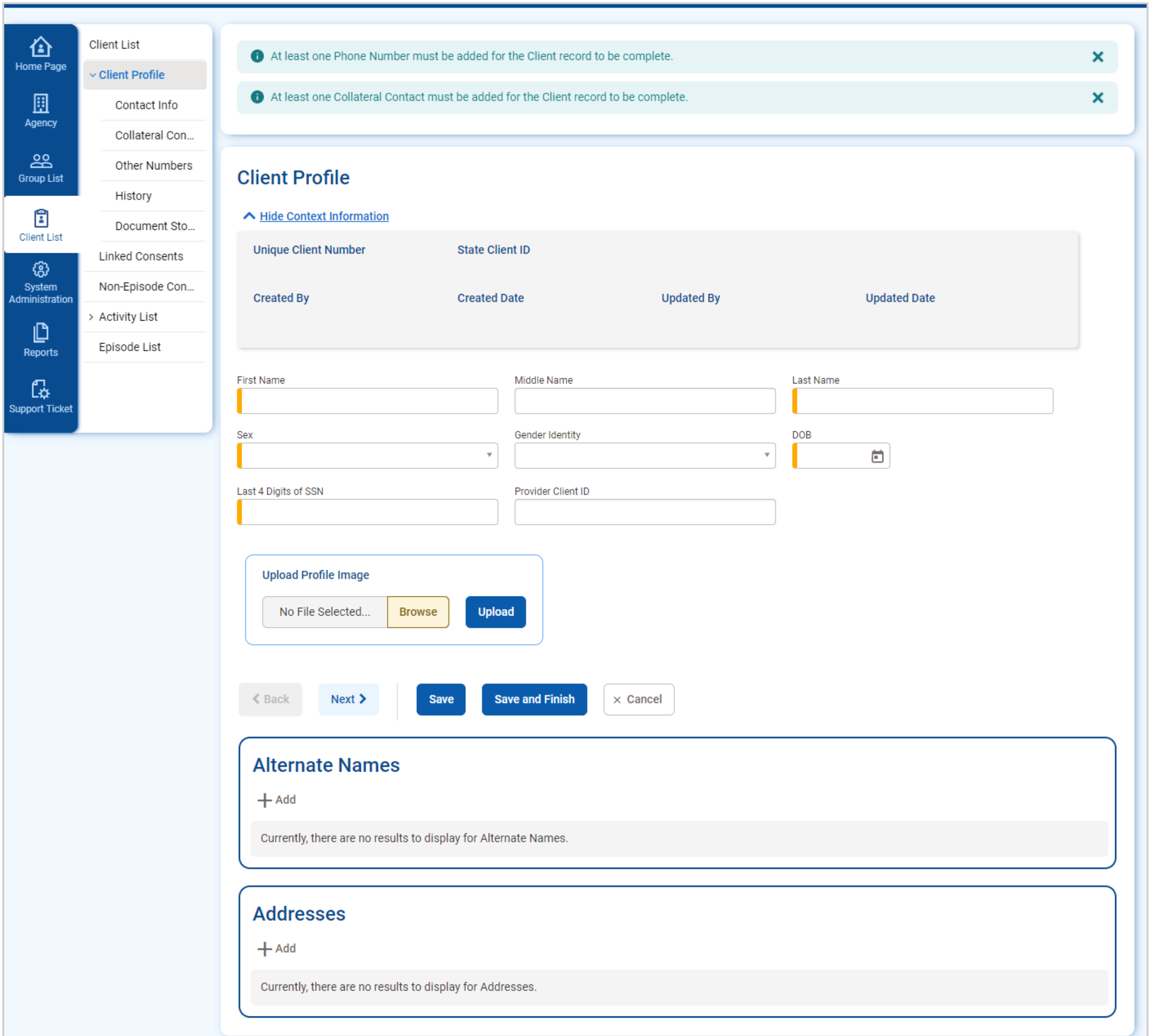
1. On the left menu, click **Client List**.
2. On the Client List screen, click **Add Client**.



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
First Name	Type the client's current first name.
Middle Name	(Optional)
Last Name	Type the client's current last name.
Gender	Select the client's gender from the drop-down list.
DOB	Enter the client's date of birth.
SSN	Type the last four digits of the client's Social Security Number.
Provider Client ID	(Optional)



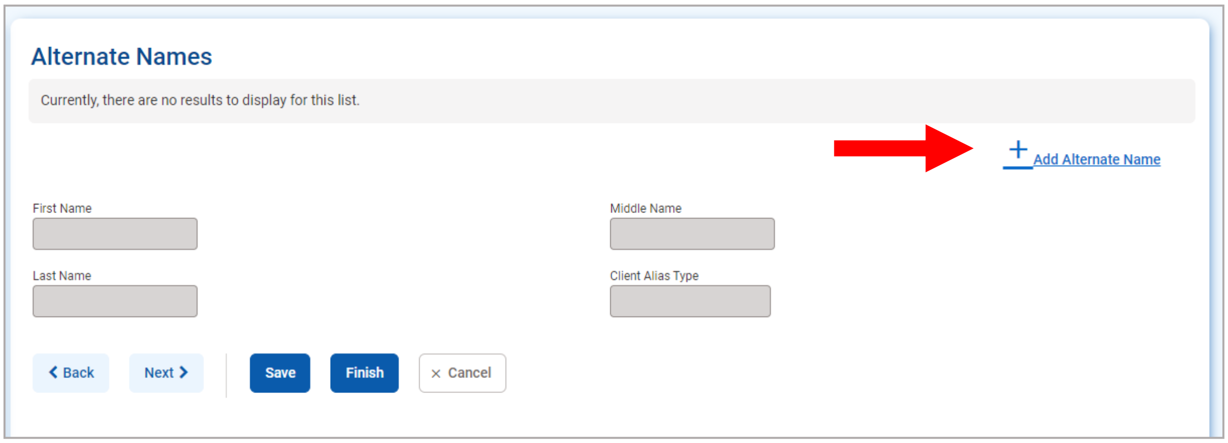
4. Click **Save**.
5. Click the **Next button** to move to the **Alternate Names** screen.

Alternate Names

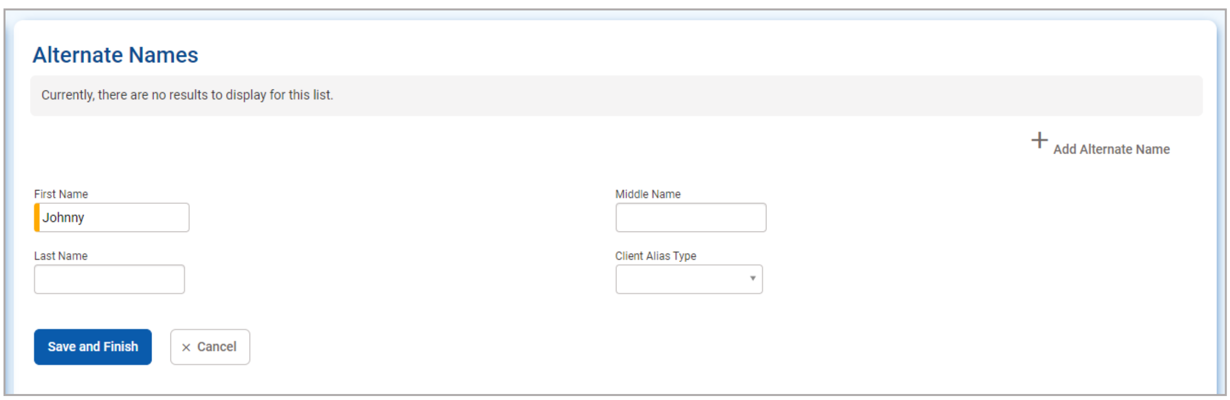
The client's nickname or street name may be entered on this screen

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.



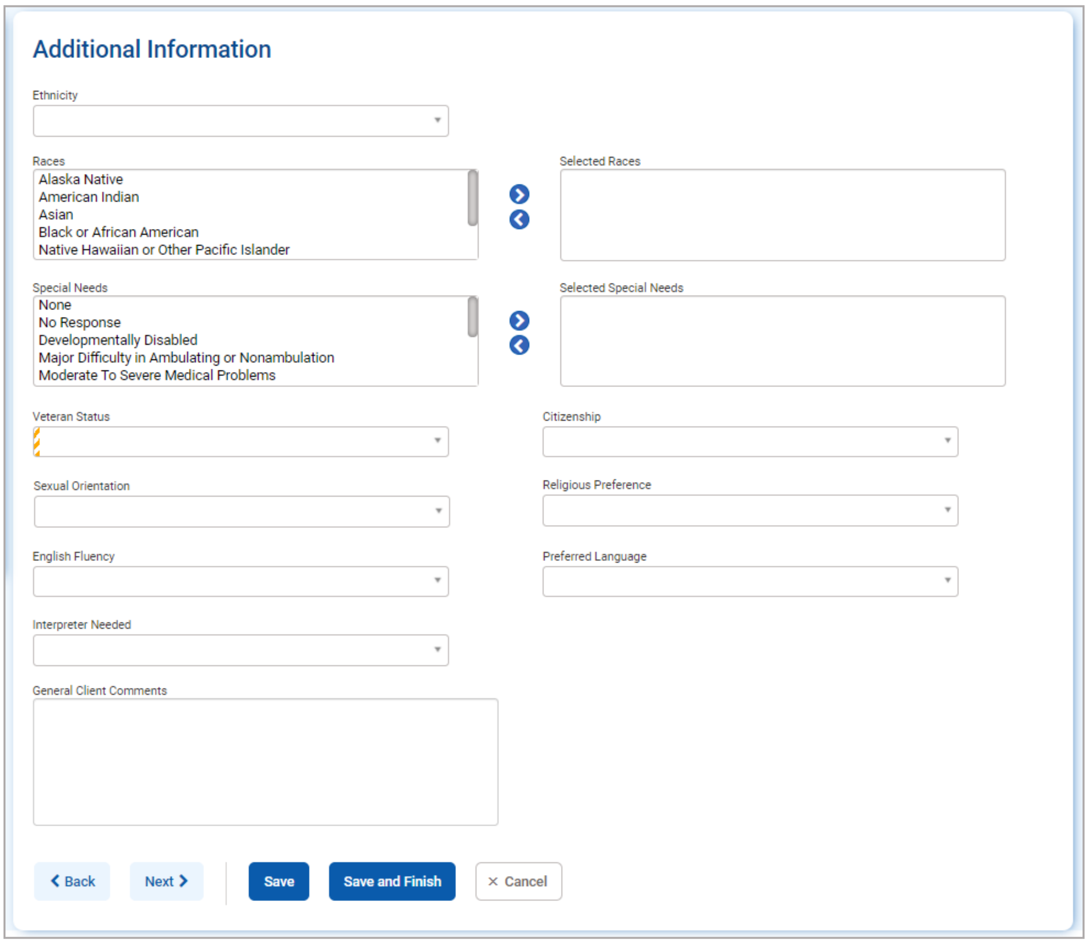
3. Click **Save and Finish**. The name will now appear in the list at the top of the screen.
4. From the Alternate Names screen, click the **Next** button to open the **Additional Information** screen.

Additional Information

1. On the **Additional Information** screen, fields that are required.

Table 2-1: Additional Information screen

Field	Description
Ethnicity	Select from the drop-down list.
Selected Races	Select one or more races.
Veteran Status	Select from the drop-down list.

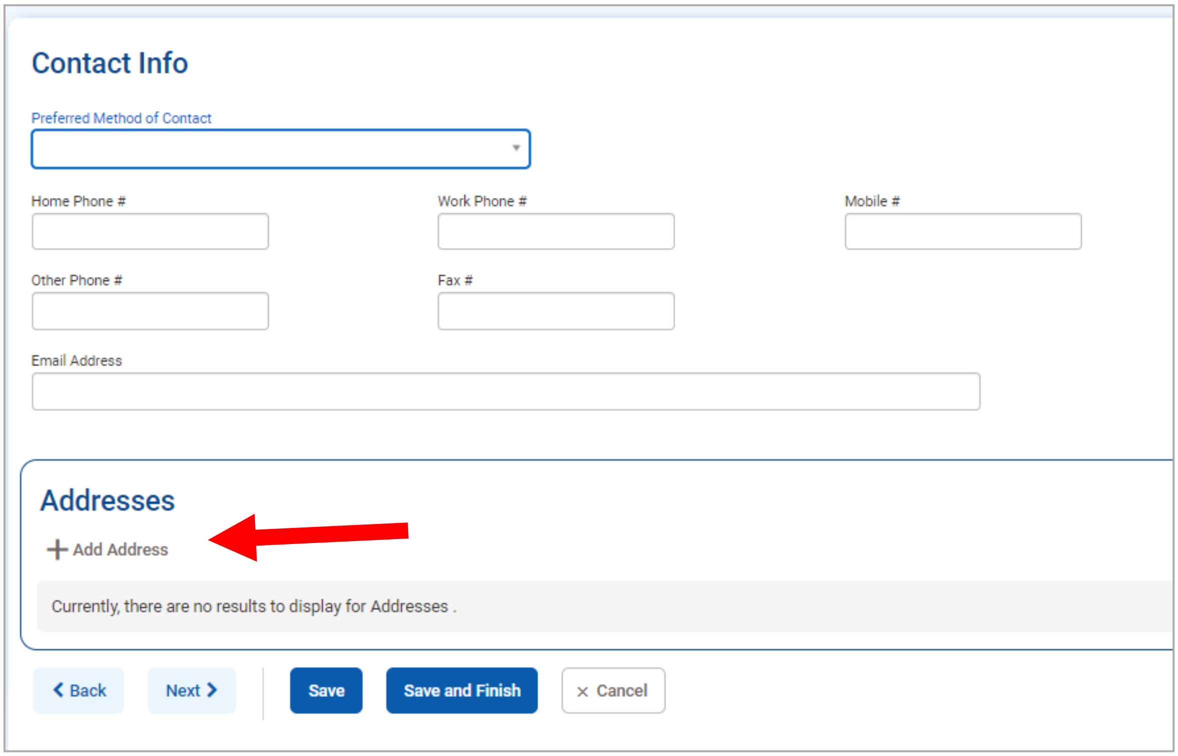


2. When complete, click **Save**, then click the **Next** button to open the **Contact Info** screen.

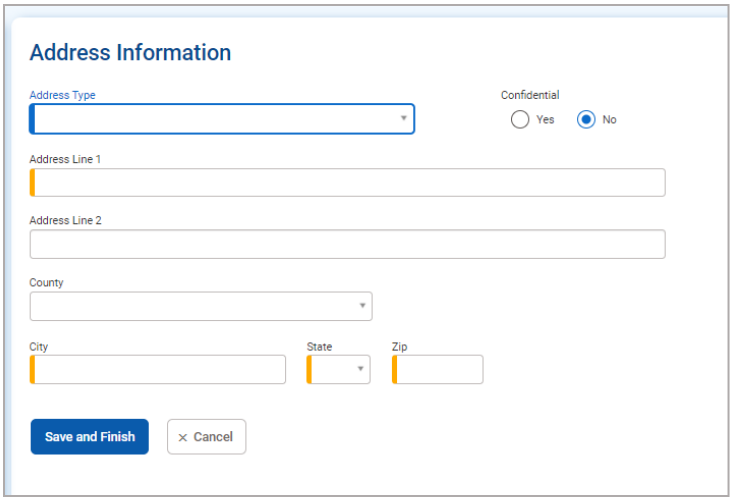
Contact Info

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.



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



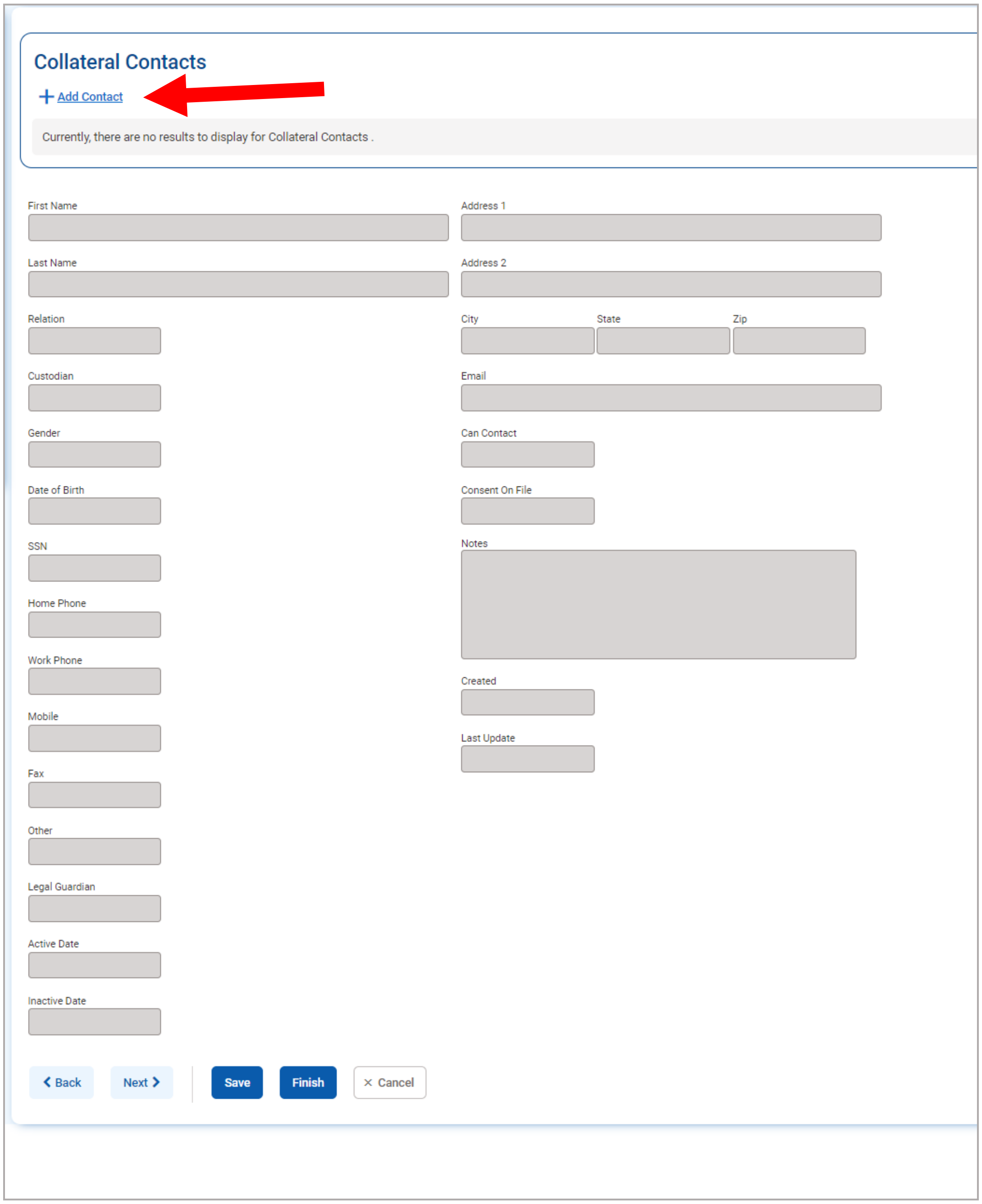
4. When complete, click **Save and Finish**, and the client's address information will show up on the Contact Info screen. You may enter several addresses for a client. If a client has a new address, update the Address Type of the current address record to "Previous", then create a new address.

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

Collateral Contacts

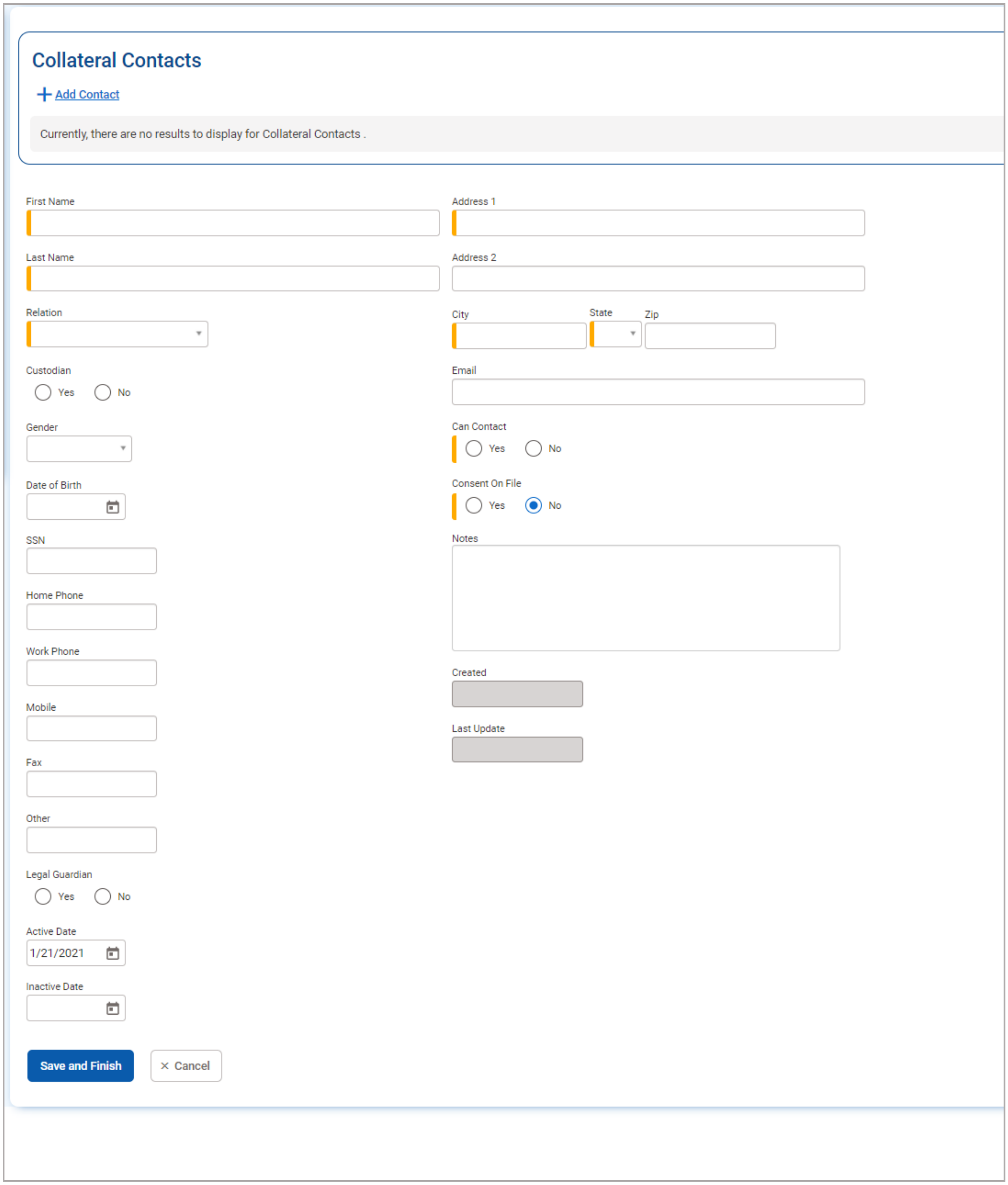
Tip: Enter any collateral contacts for the client on this screen to help locate the client for follow-ups.

1. On the **Collateral Contacts** screen, click the **Add Contact** link.



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.



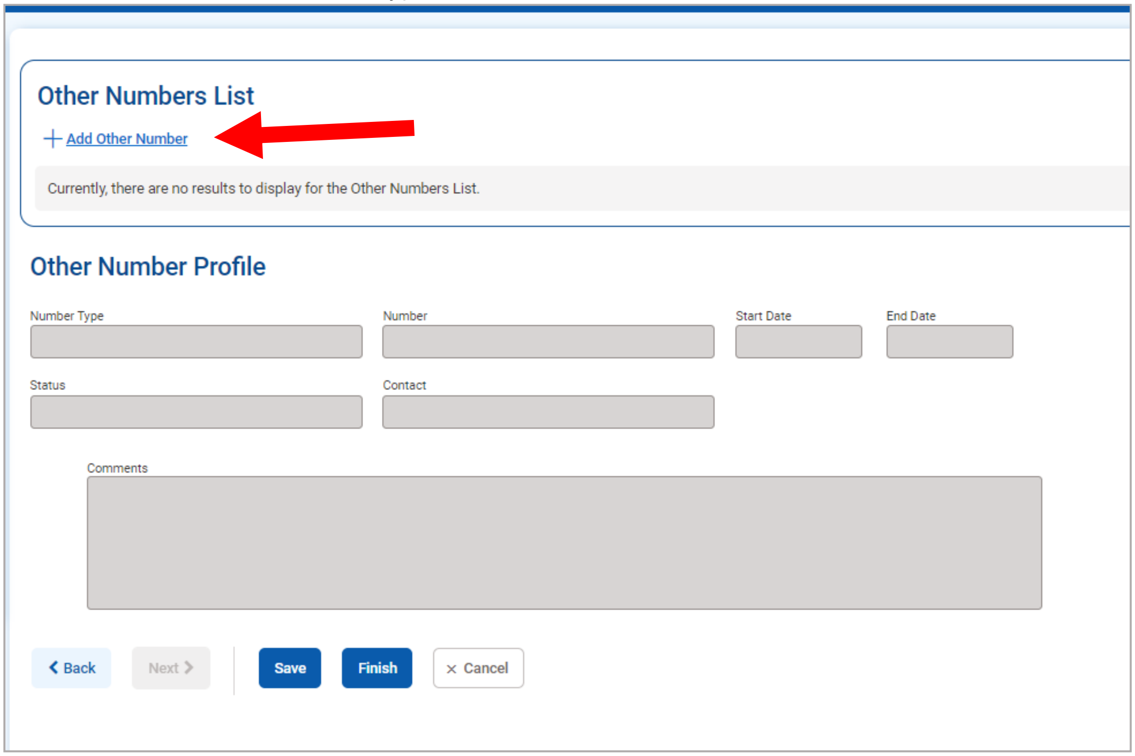
3. When complete, click **Save and Finish.** The collateral contact name(s) will be displayed in the list section of the screen.

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

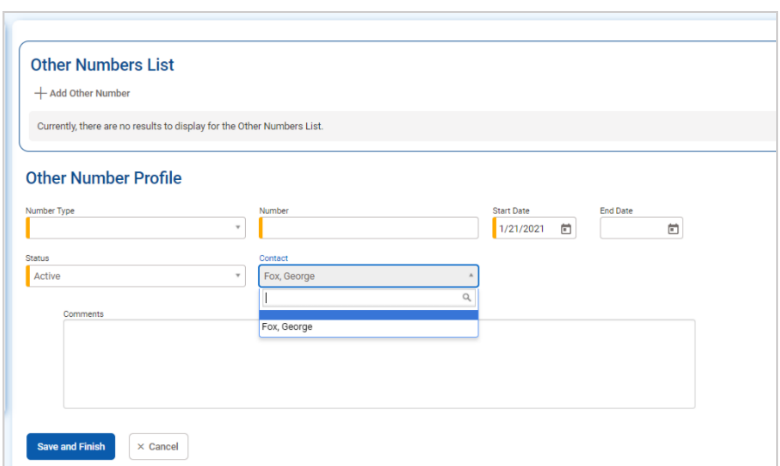
Other Numbers

In this section, users can add additional identifying numbers for a client, such as a court case number.

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.



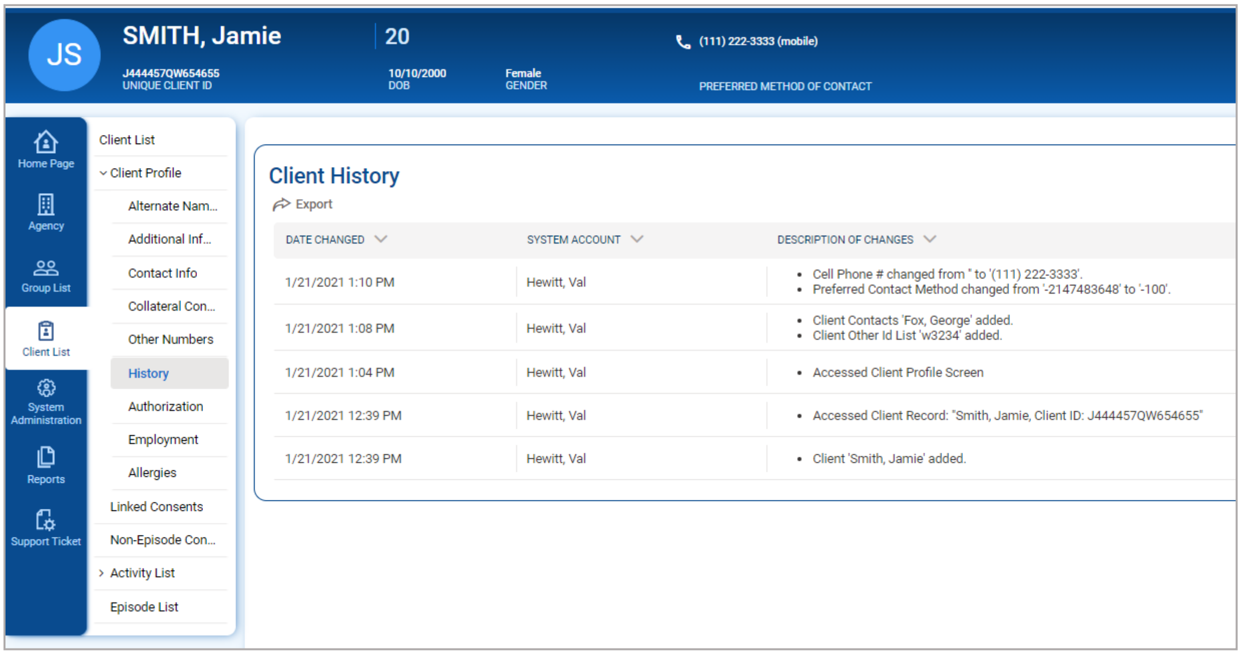
3. The **Contact** dropdown box will display the names of any saved Collateral Contacts from the previous screen. If the name of the Collateral Contact is not present, click on the **Collateral Contacts** screen to add a new record.



4. When complete, click **Save and Finish**. The names now show up in the table on top of the screen.
5. Click **Finish** again, and you are redirected to the **Client Search** screen.

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.



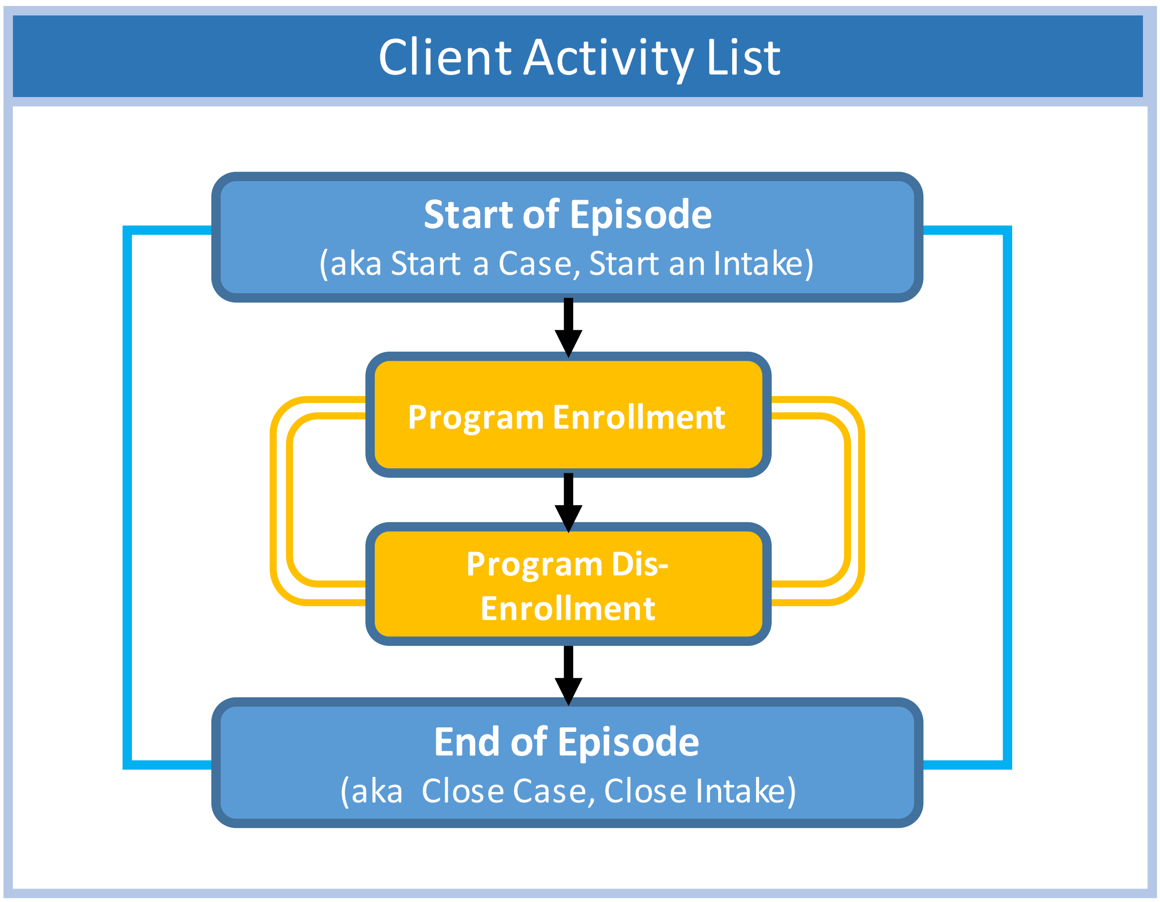
Part 3: Client Intake and Program Enrollment

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 (these fields are shown in *Figure 3-4: Intake Case Information* screen on page 23).

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.

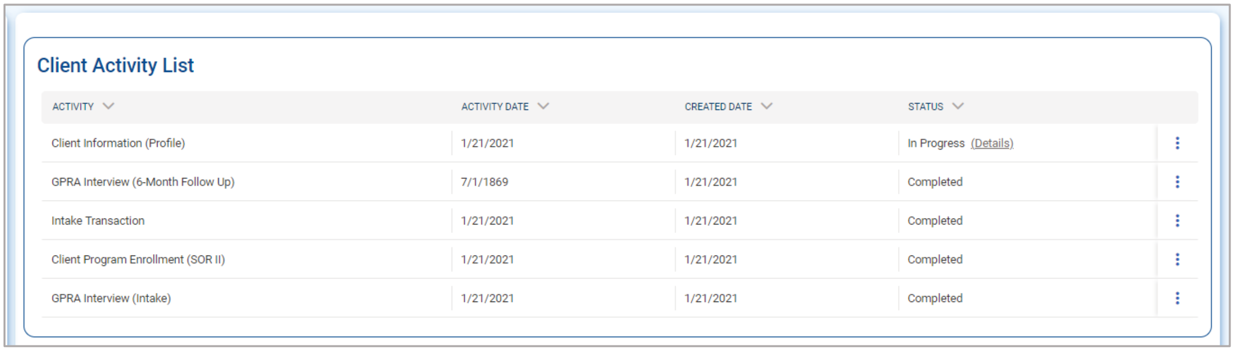
When an Episode of Care ends for a client, this signifies that the client is no longer receiving services. It's possible for that client to return at a future date.



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 a following activity. Validation rules will guide you throughout the workflow as you enter new data.

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



Client Activity List

ACTIVITY	ACTIVITY DATE	CREATED DATE	STATUS
Client Information (Profile)	1/21/2021	1/21/2021	In Progress (Details)
GPRA Interview (6-Month Follow Up)	7/1/1869	1/21/2021	Completed
Intake Transaction	1/21/2021	1/21/2021	Completed
Client Program Enrollment (SOR II)	1/21/2021	1/21/2021	Completed
GPRA Interview (Intake)	1/21/2021	1/21/2021	Completed

Figure 3-1: Client Activity List, Details link

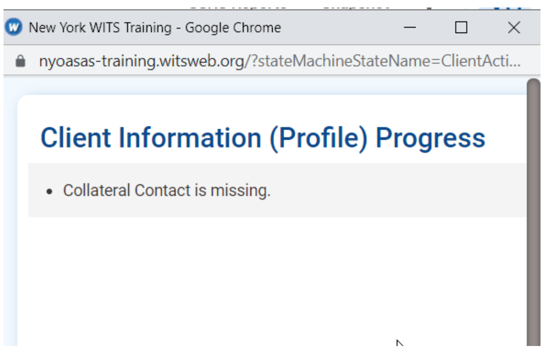


Figure 3-2: Details link, list of missing information

Some Client Activities do not have a concept of being complete. For those activities, the Status will be listed as Not Applicable.

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. In the screen capture below, note the Activity List in the left menu only displays one item, "Episode List". An episode must be created before accessing 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.

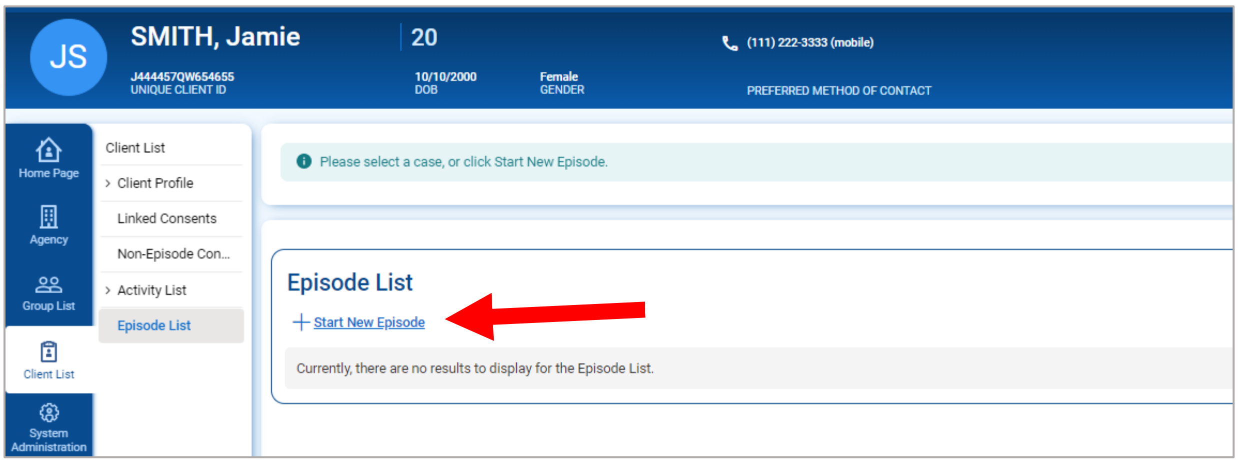


Figure 3-3: Episode List screen, Start New Episode link

If the client profile is complete, clicking **Start New Episode** will open the **Intake Case Information** screen, as shown in Figure 3-4: Intake Case Information screen.

(Continue to next section)

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.

Table 3-1: Intake Case Information Fields

Field	Description
Intake Facility	Pre-populates with the current facility location.
Intake Staff	Pre-populates with the current staff member name.
Case Status	Defaults to "Open Active".
Initial Contact Date	The date when the Client first reached out for treatment.
Intake Date	Enter the client's intake date, (which also marks the beginning of the client's Episode). This field will default to today's date.
Residence	Select from the drop-down list.
Date Closed 	The Date Closed field is used to mark the end of the client's Episode.

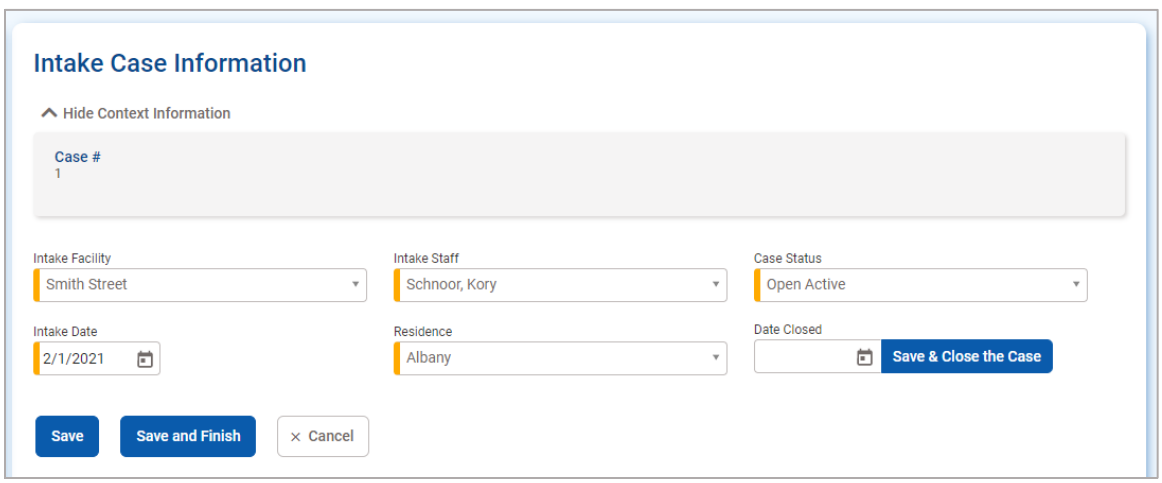


Figure 3-4: Intake Case Information screen

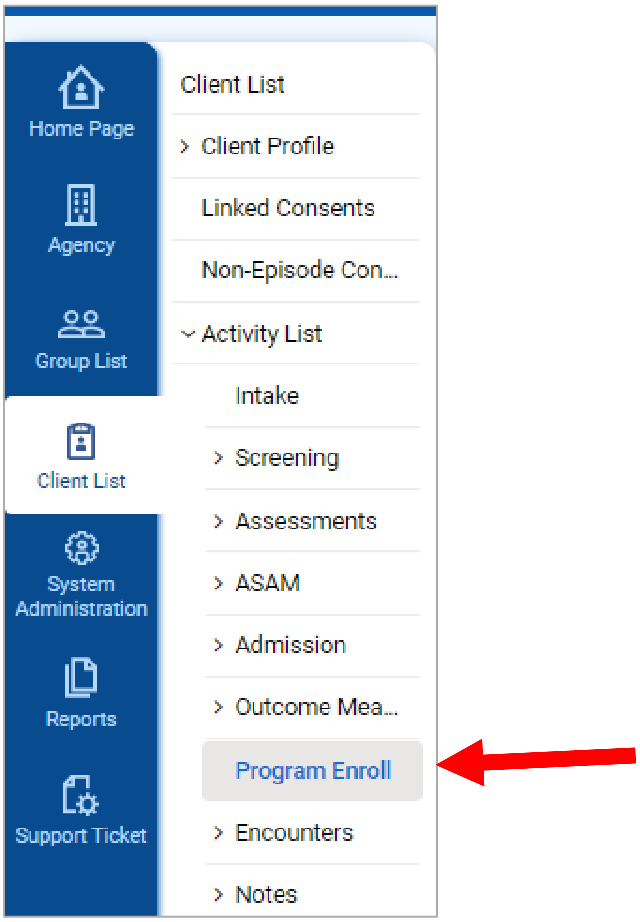
3. Click **Save and Finish**.

Program Enroll

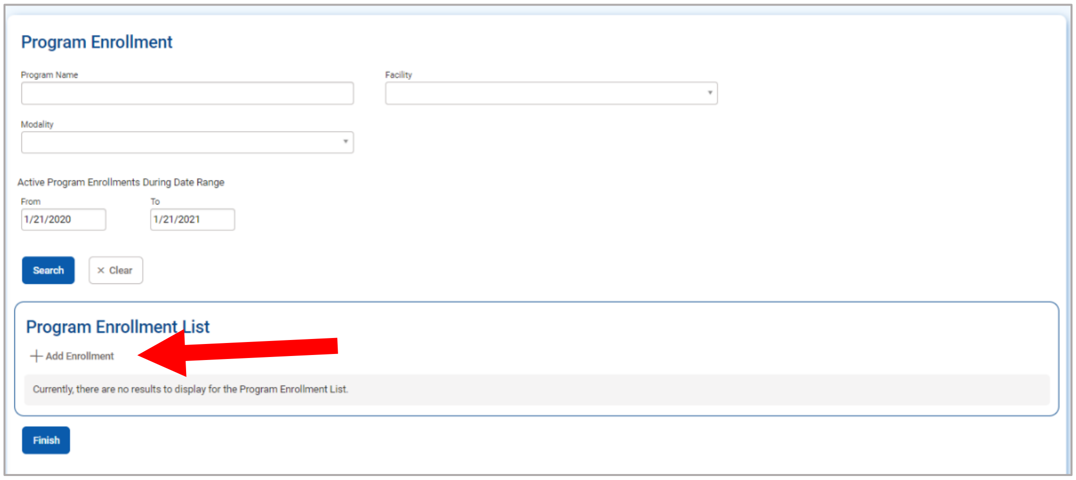
Where:* *Client List* > *Activity List* > *Program Enroll

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

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

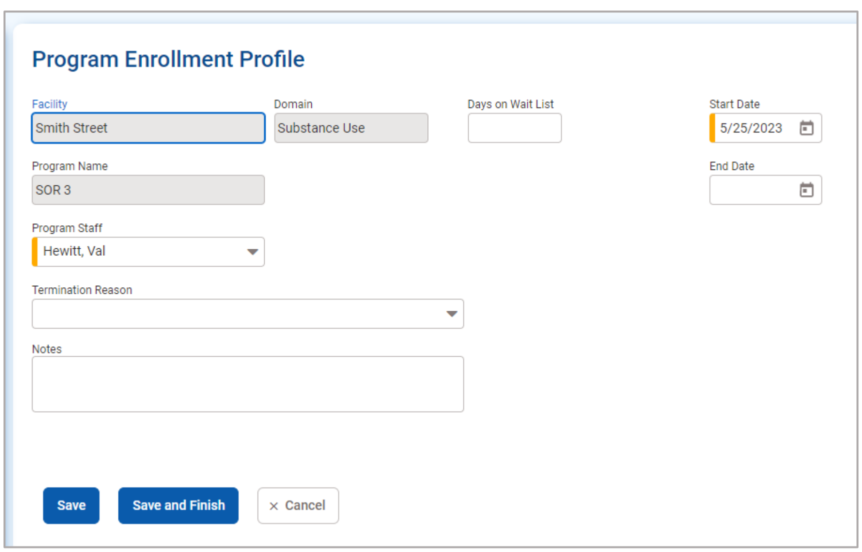


2. Click the **Add Enrollment** link.



3. Complete fields on the Program Enrollment Profile.

Field	Description
Facility	Defaults to the current Facility name.
Program Name	Select the appropriate 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.
Notes	Type any notes as needed.



4. Click **Save and Finish**.

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

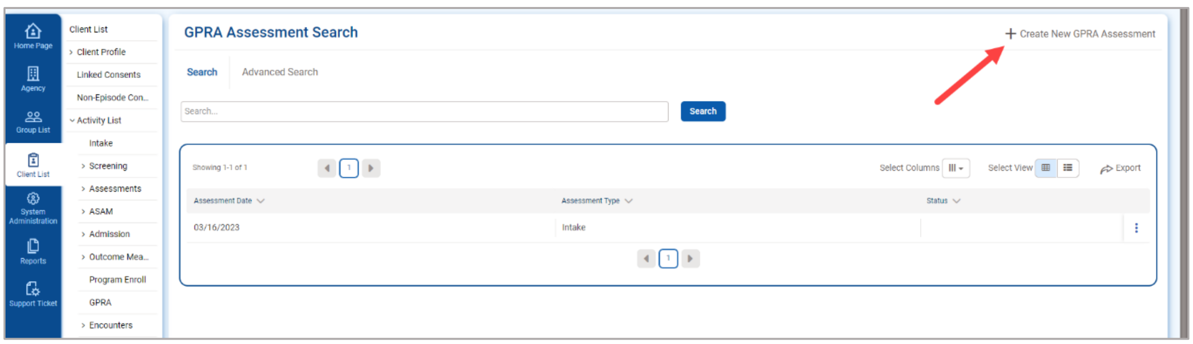
Part 4: GPRA Interviews

***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 section displays a list of previously entered GPRA interviews (at that agency) and includes link(s) to add a new interview record. For previously entered GPRA interviews, available actions include, View, Edit, and Delete, which are described below in ***Error! Reference source not found.***.

Important: The GPRA Assessment menu item will only appear if:

1. The staff member completing the GPRA interview has been assigned the following role, "GPRA (Full Access)" or Grant Data Entry (Full)". This role is assigned by your WITS or agency administrator.
2. The GPRA interview is being done for a client who is enrolled in a WITS program associated with the SOR III grant. Your WITS administrator should advise you as to which of your agencies' programs are associated with the SOR III grant.



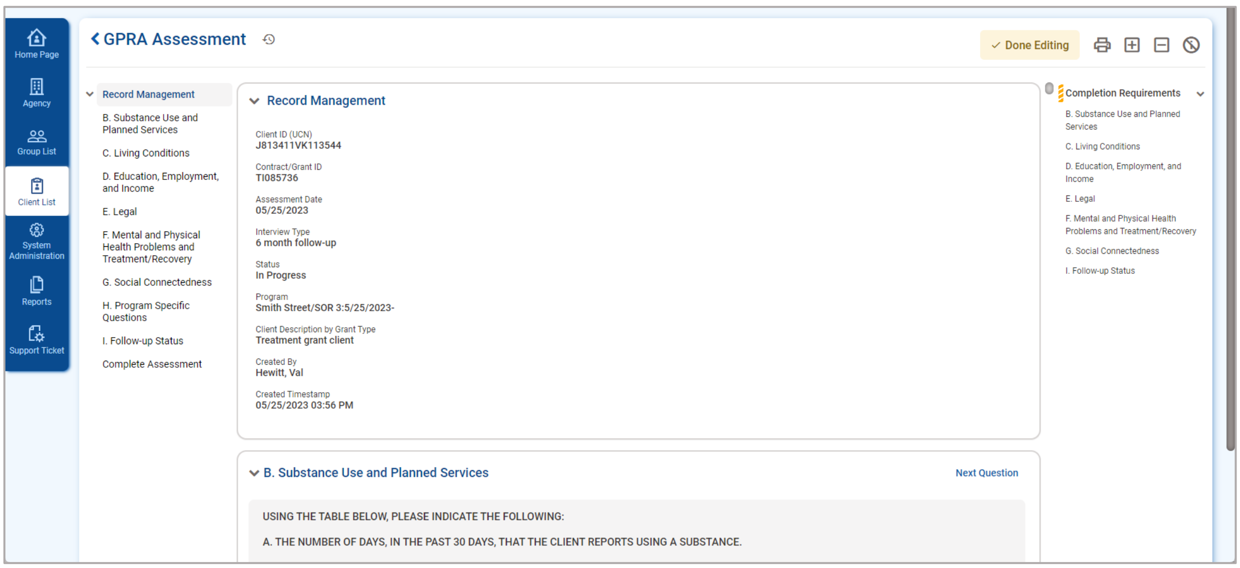
Tip: Depending on the existing interview record(s), the choice of adding a GPRA Follow up or a GPRA Discharge is available. The first GPRA Interview that can be added is the GPRA Intake.

Action	Description
View	Opens the interview in read-only mode.
Edit	Opens the interview in edit mode, where certain fields can be updated. A Save button is available on screen, and when clicked, an information message will appear stating that the record has been successfully updated. A completed GPRA will need to be unlocked to edit. Once the edits are complete, the GPRA will need to be re-locked so that the information will be included in the nightly sweep of data to SPARS.

Action	Description
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).

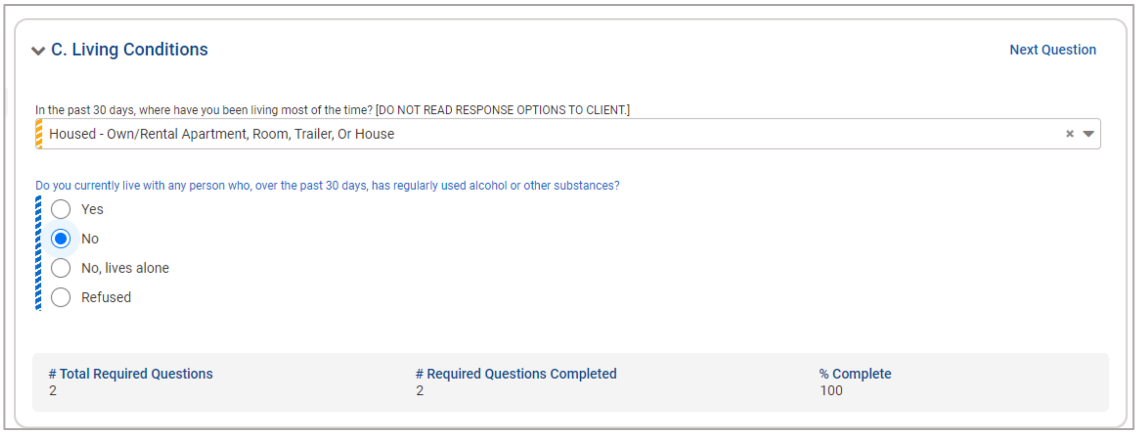
GPRA Screen

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 will show the completion requirements for each section. As those sections are completed, the requirement will disappear from the panel.



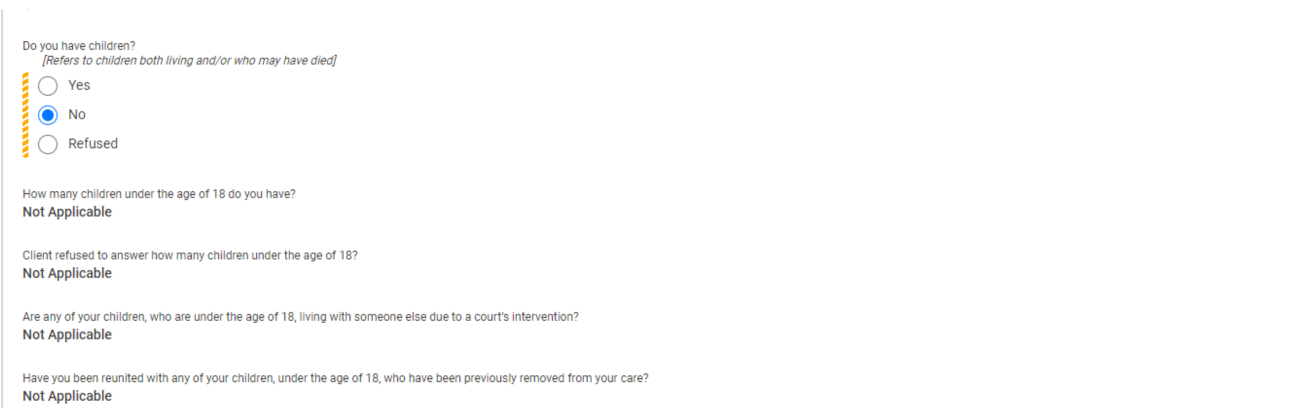
Completion Requirements

As you complete a section, the bottom of the section will show the number of required questions in that section, the number for required 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".



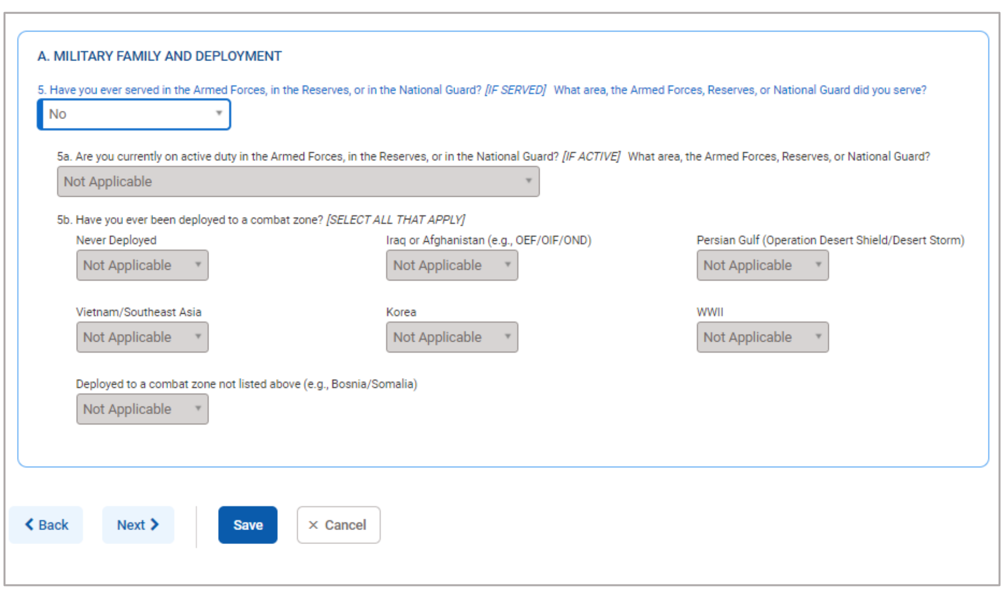
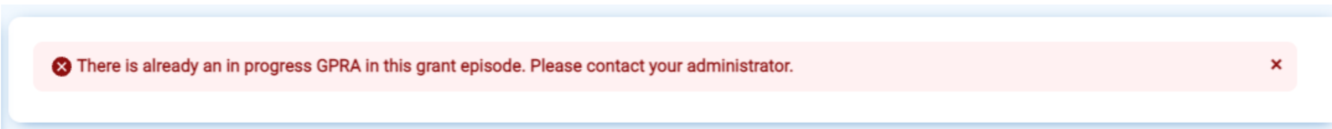


Figure 4-1: GPRA Interview, Automation (skip logic) example

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 to not 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 WITS administrator to coordinate the process.

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

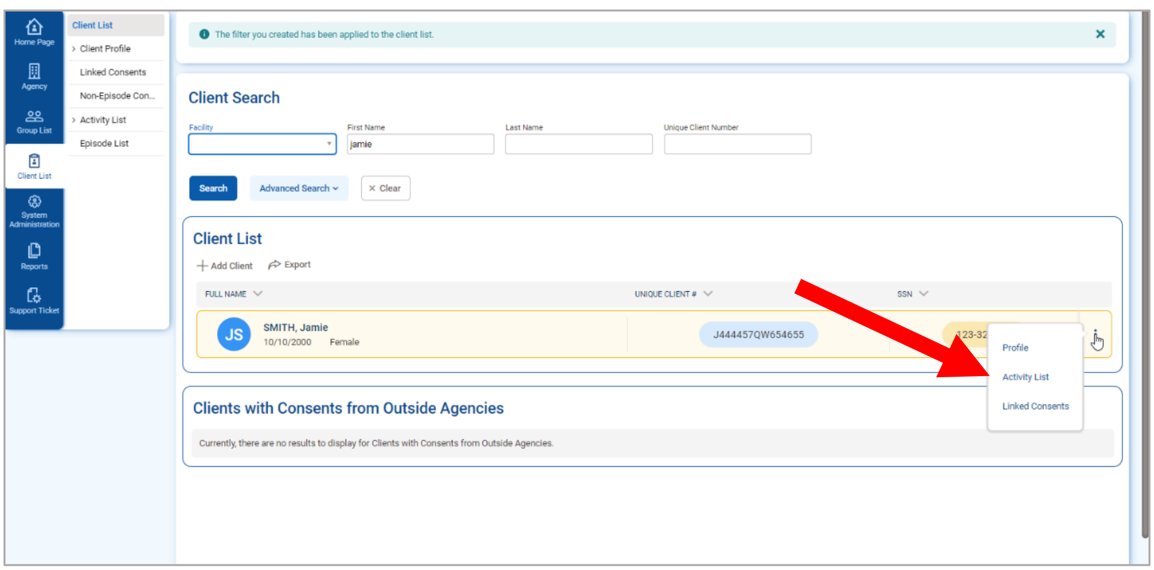


Figure 4-2: Access Activity List

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

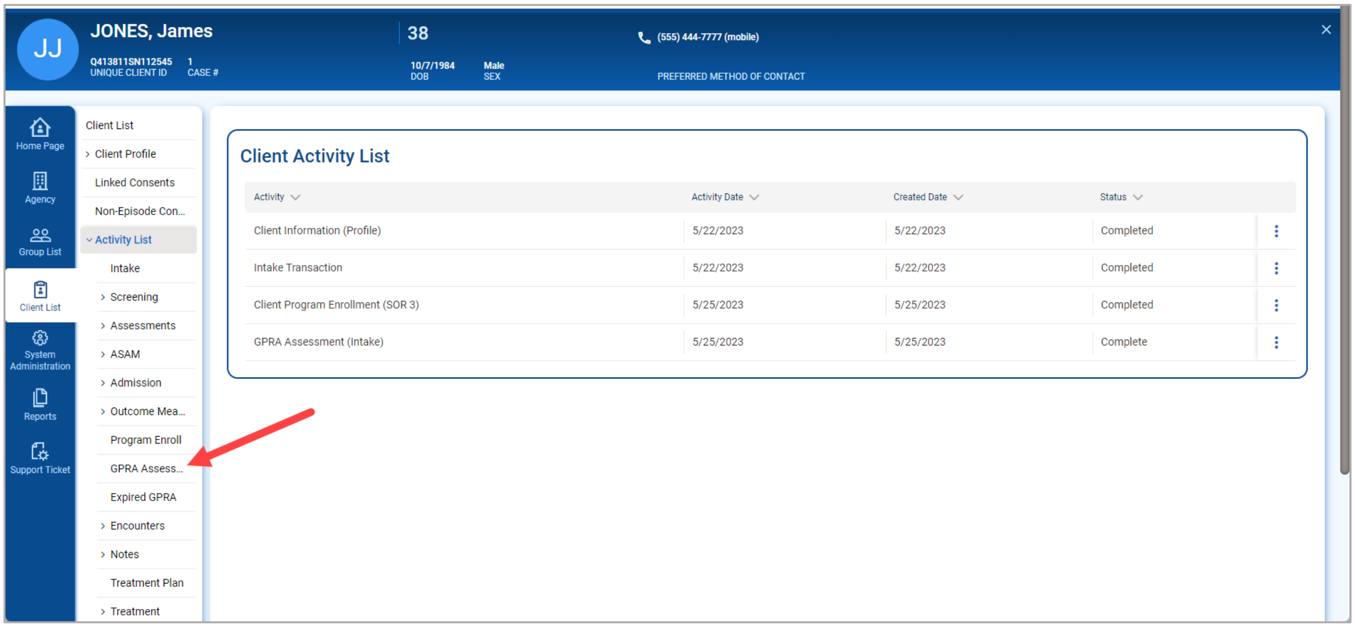


Figure 4-3: Access the GPRA Screen

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

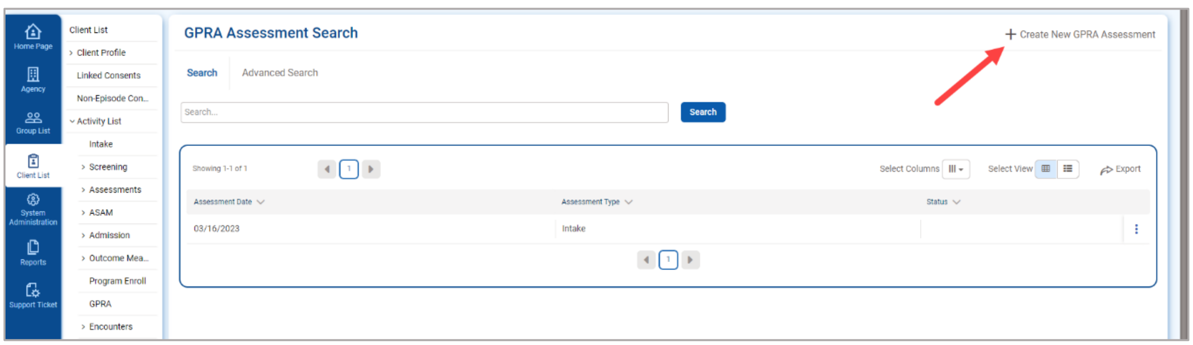
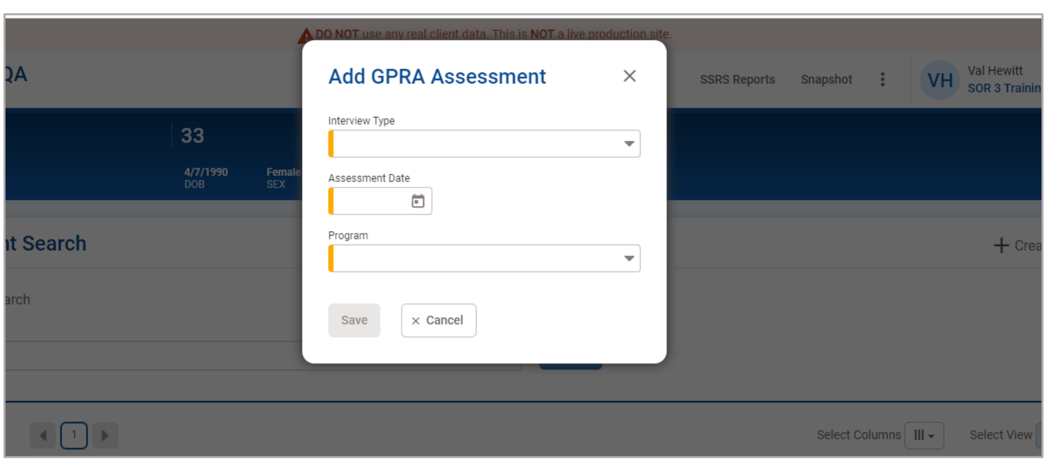


Figure 4-4: Add GPRA Intake

4. A pop up window will ask the interview type, assessment date and will allow you to select the program enrollment fill out the information and click Save.

5. 

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

Note: The 'Interview Date' must be greater than or equal to client intake date.

The 'Interview Date' must occur during the active period of the selected Program Enrollment (MM/DD/YYYY).

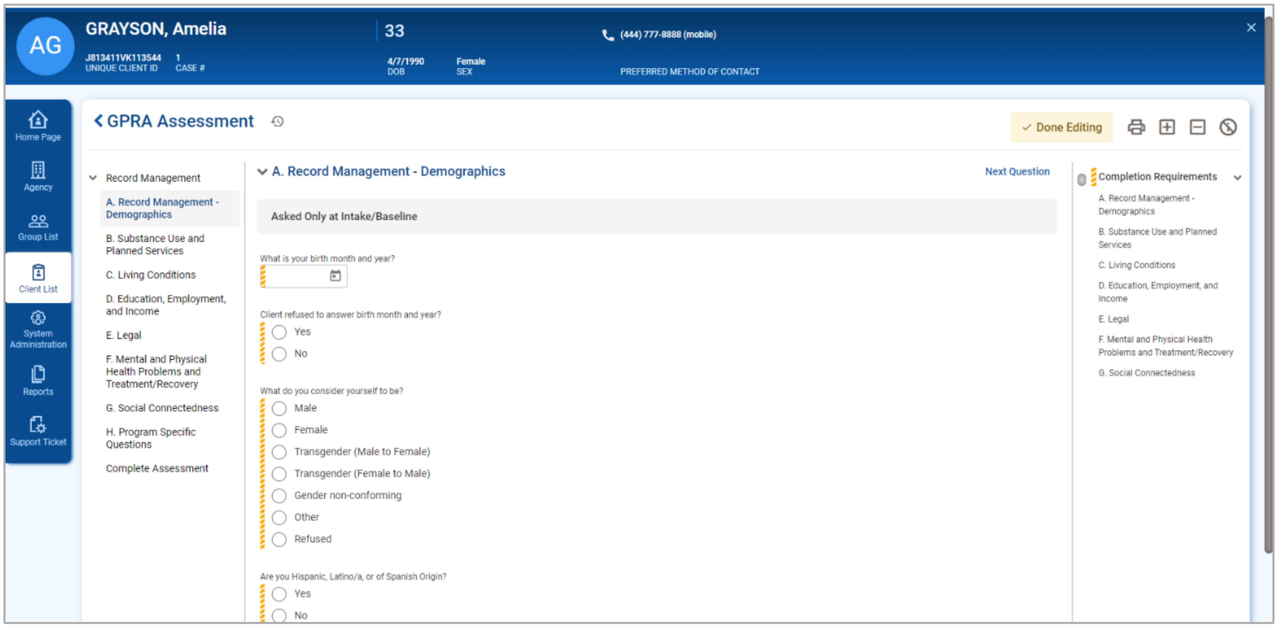
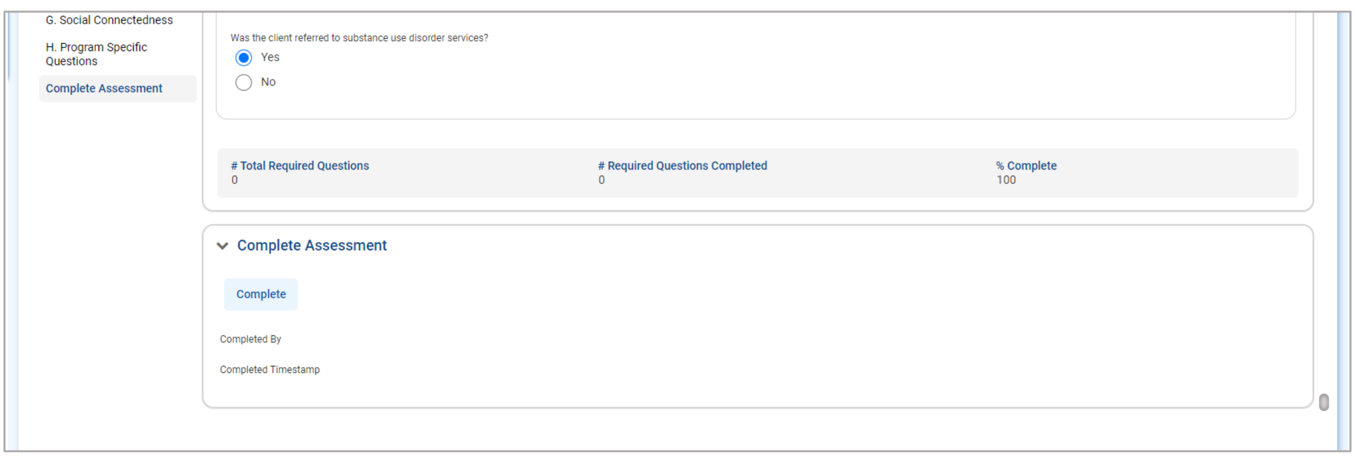
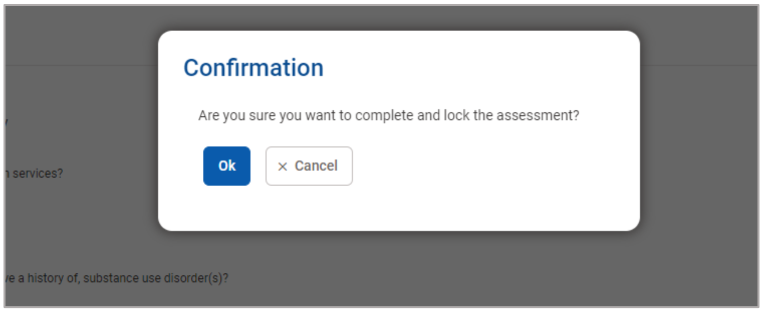


Figure 4-5: GPRA Intake, Record Management section

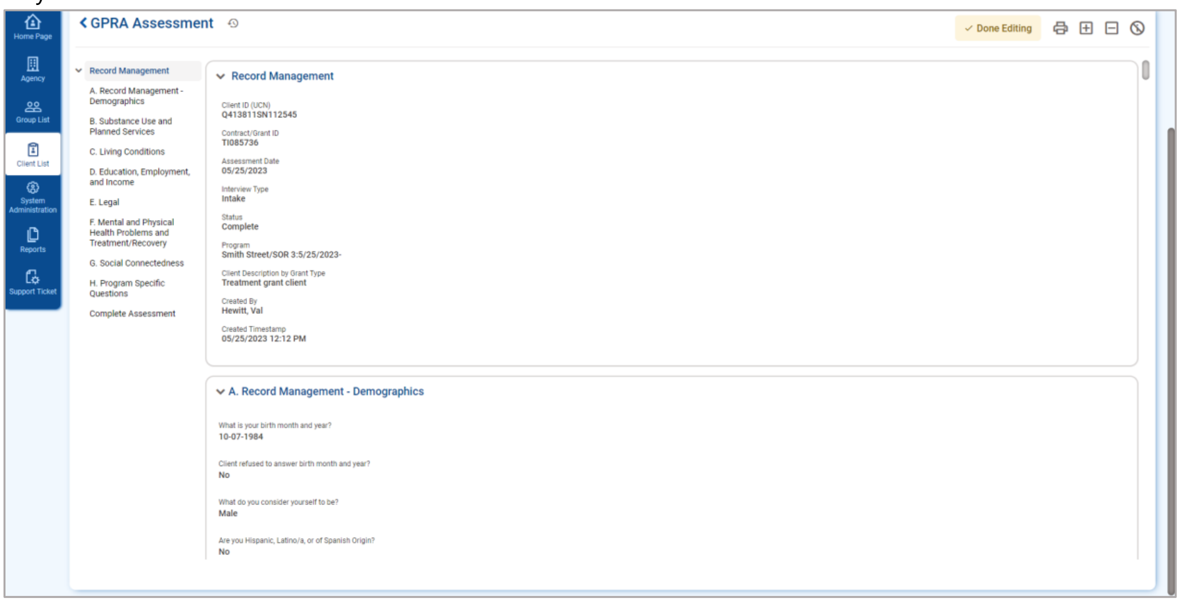
7. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Complete**.



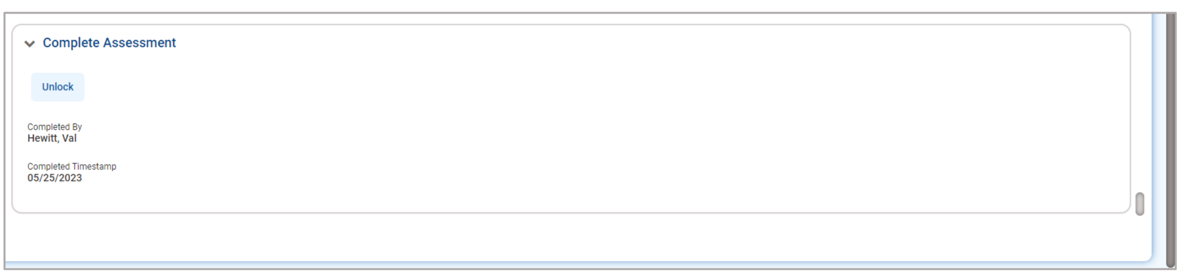
8. A confirmation pop up will appear asking to confirm that the assessment is complete and to lock the assessment once locked, the assessment cannot be edited unless the assessment is unlocked. Click **Ok**.



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



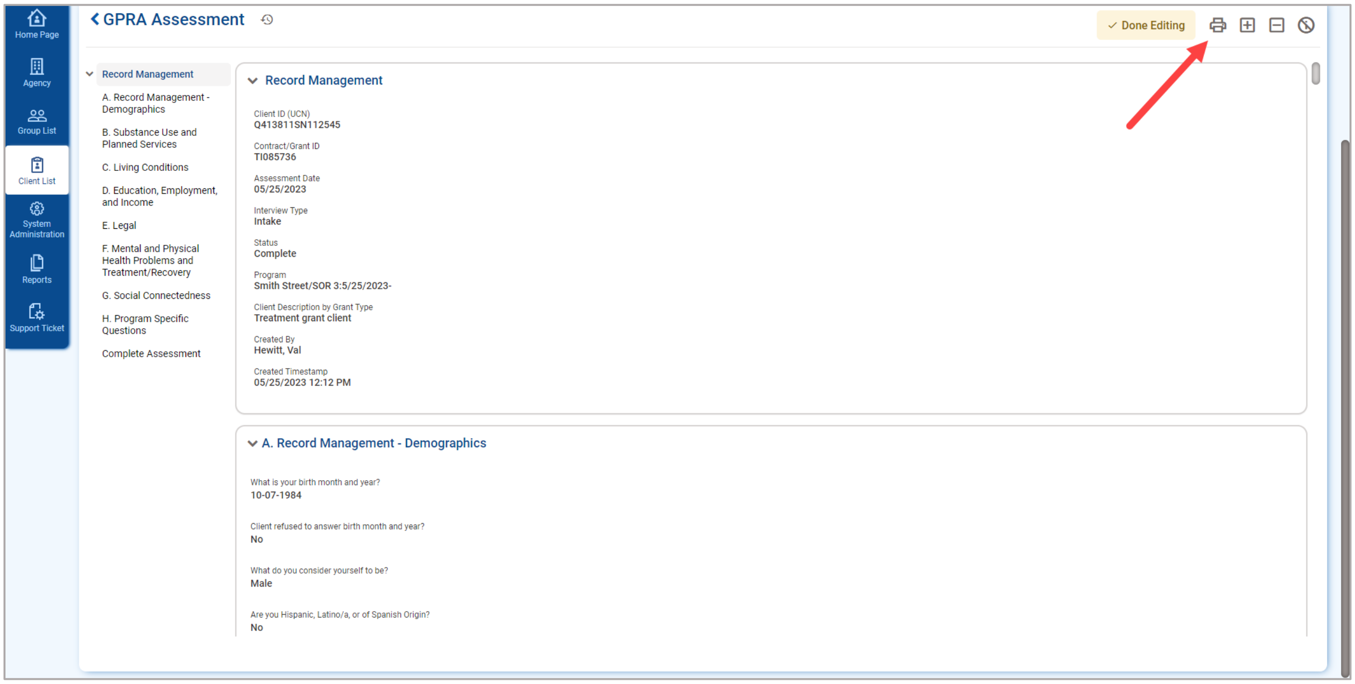
At the bottom of the page, the Compete Assessment section will show that it is locked, and which user completed it, with a date and timestamp of the completion.



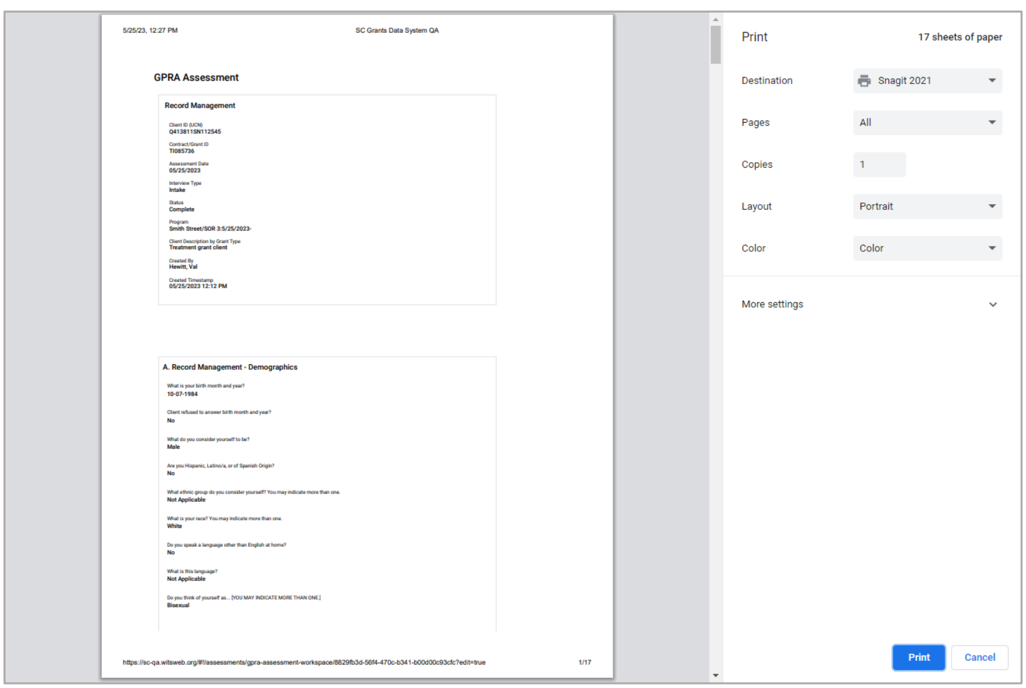
Printing a GPRA Assessment

Completed GPRAS can be printed to paper or PDF. To print a completed GPRA, from the GPRA summary page:

1. Click the Printer icon in the upper right corner.



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

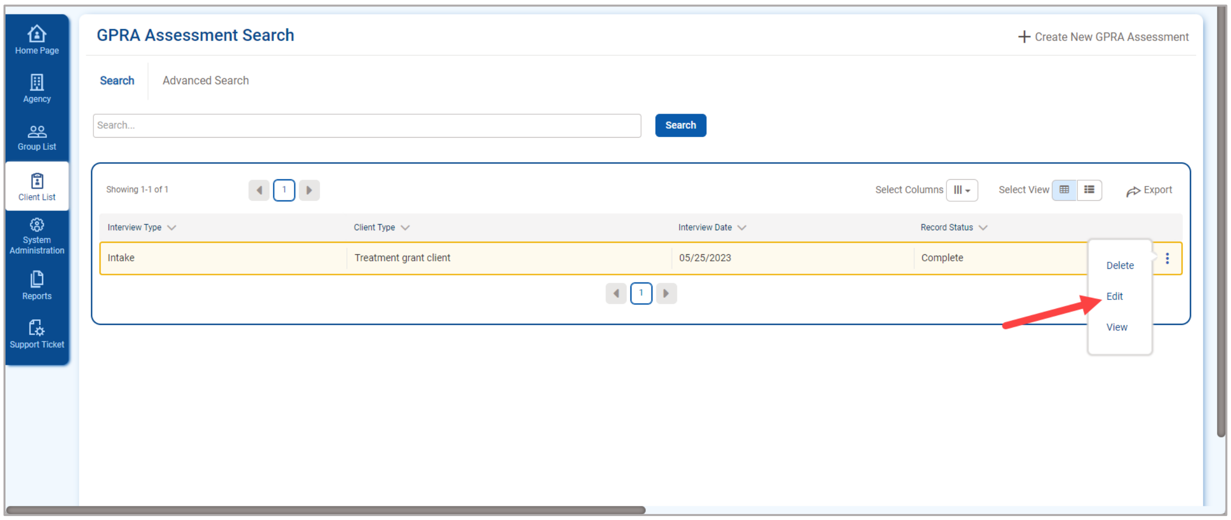


Editing a GPRA Assessment

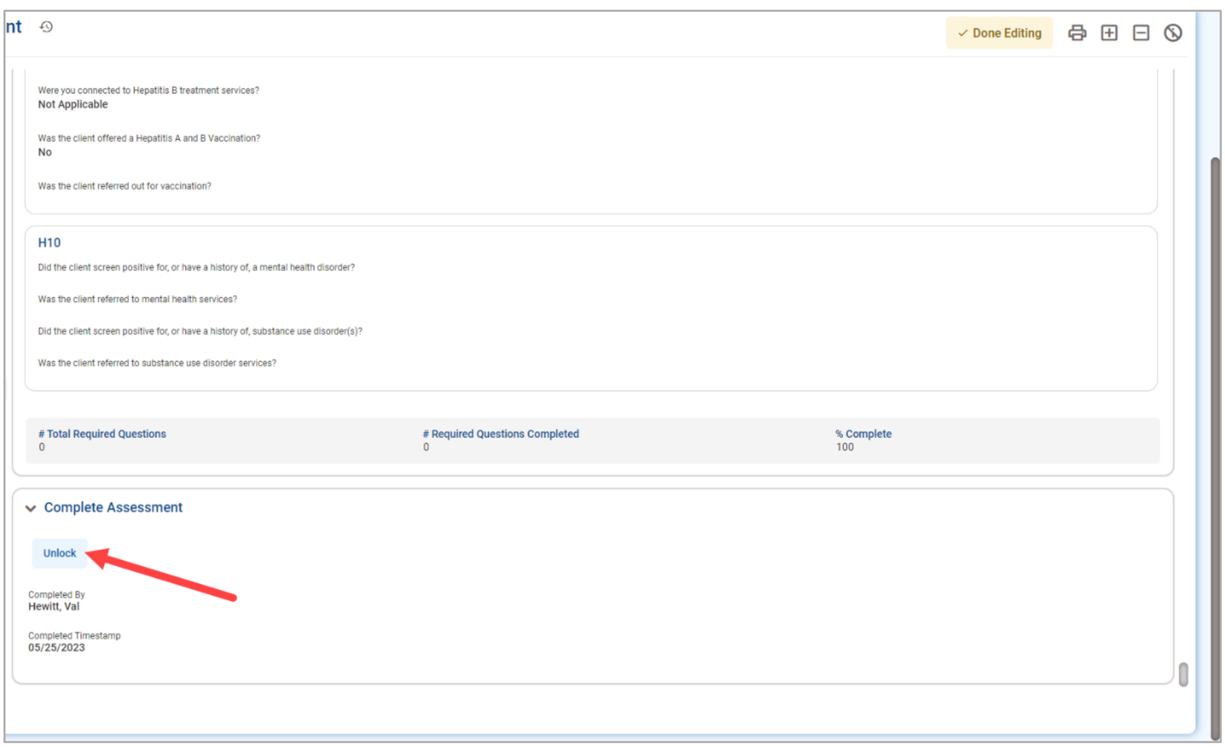
To make an edit to a GPRA, the Assessment must first be unlocked. Once unlocked, the change can be made. After the change is made the assessment must be locked again. An assessment that is left unlocked will not be sent to SPARS for updated information, and may affect your compliance rate. It is critical to lock an assessment after the change has been made.

To edit a GPRA:

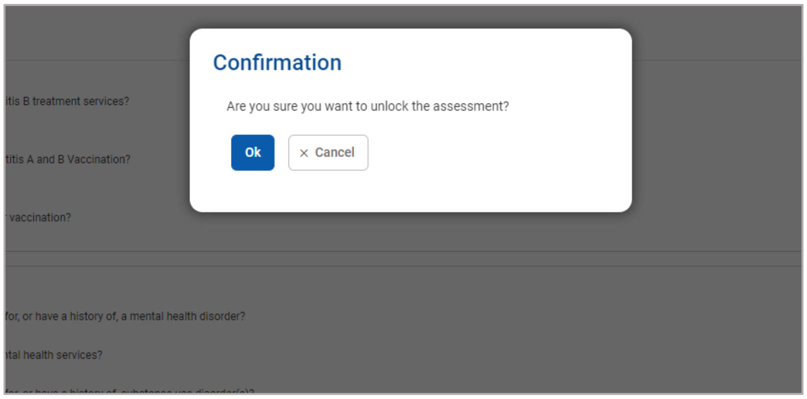
1. From the GPRA Assessment Page, hover over the ellipsis and click **Edit**.



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.

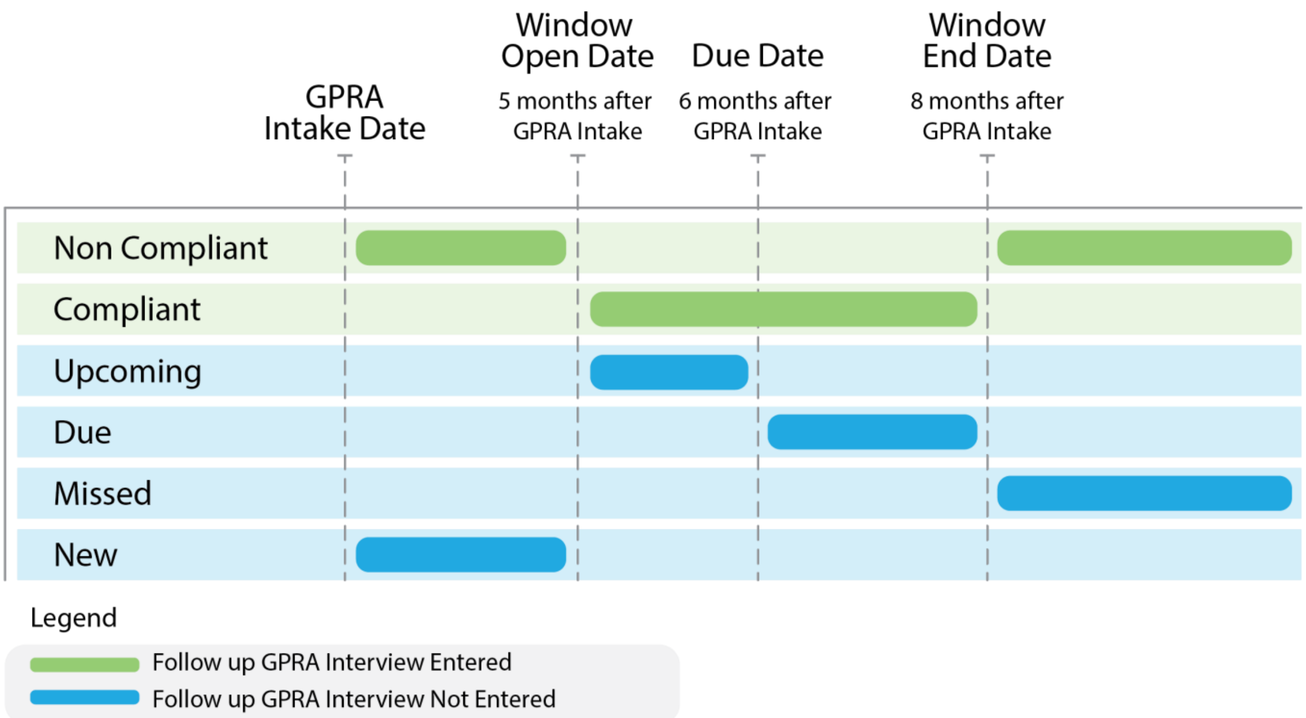


4. Make the required changes, and when finished, click Lock at the bottom of the page. This will allow the updated GPRA to be included in the nightly upload to SPARS.

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.



Compliance Rate Calculation = Number Compliant / (Number Compliant + Number Non Compliant + Number Due + Number Missed)

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.

Term	Meaning
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.

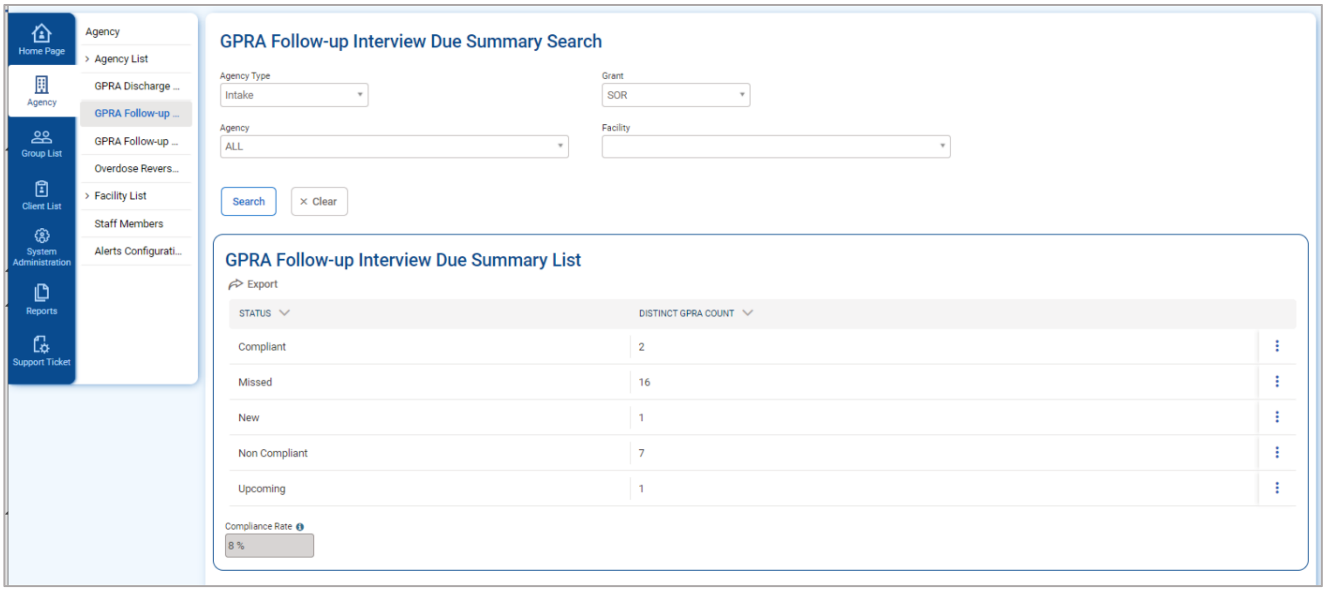
GPRA Follow-up Due Summary Screen *Will be Updated for SOR 3 in Phase 3 Release

Where: Agency > GPRA Follow-up Due Summary

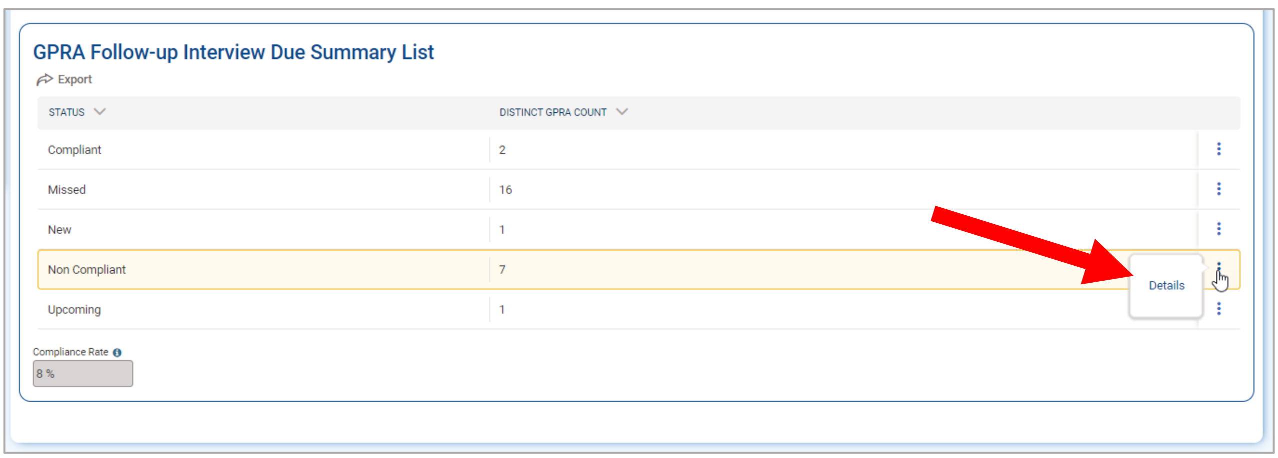
The **GPRA Follow-up Due Summary** screen displays a summary view of where an agency stands with their follow up interviews and includes the agency's compliance rate. Users can select from the available search fields and click **Go** to view the search results. Information on these search fields are 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. For definitions of each status, see ***Error! Reference source not found.*** on page 35 **Error! Reference source not found.**.

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 III 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 under System 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.



Detailed information for each interview status can be seen by hovering over ellipsis icon in the Actions column, then clicking **Details**. The system will then redirect to the GPRA Follow-up Due Detail screen, displaying the associated client records 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* Will be updated for SOR 3 in Phase 3 Release

***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.

Table 4-1: GPRA Follow-up Due Detail Screen Search Filters

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 III 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.*** on page 35 **Error! Reference source not found.**.

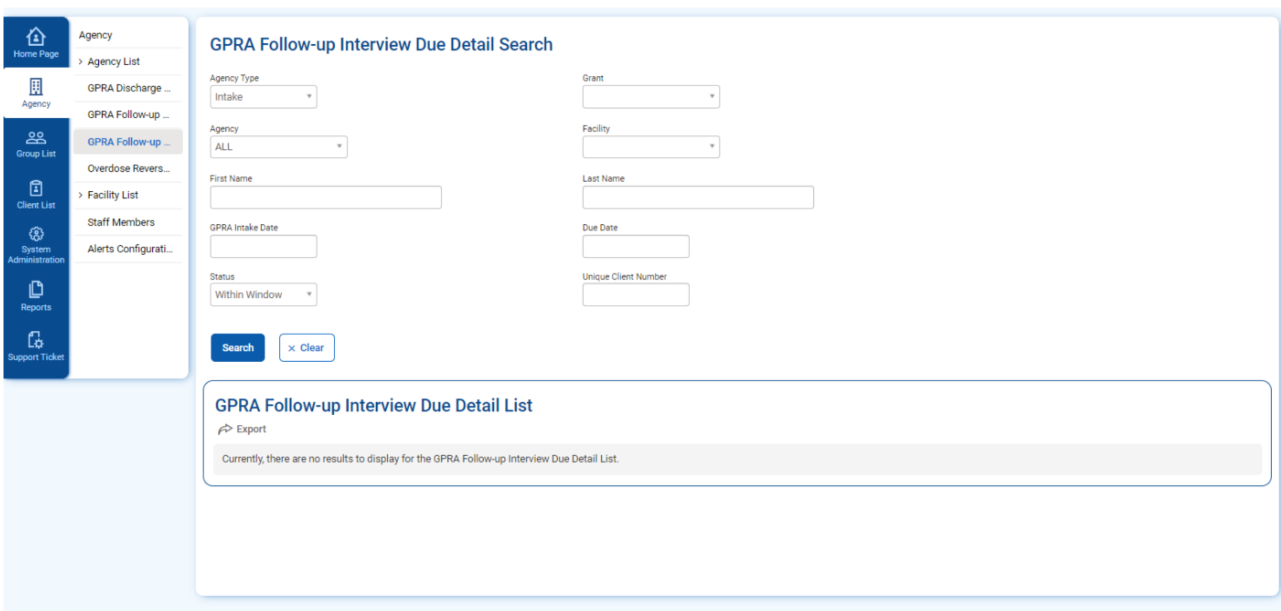


Figure 4-6: GPRA Follow-up Due Detail screen

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.

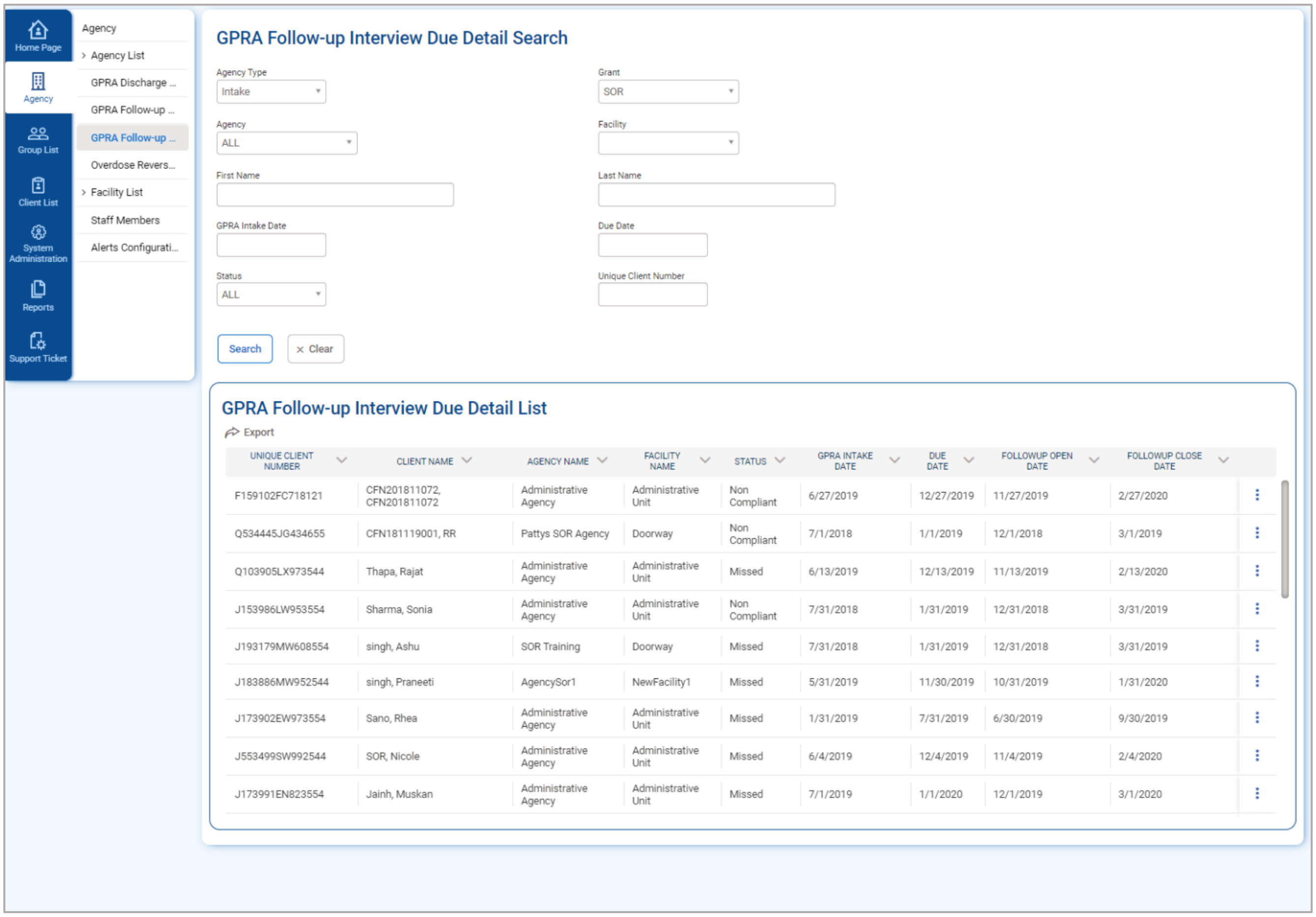


Figure 4-7: GPRA Follow-up Due Screen, pre-populated based on Summary screen selections

In the **Actions** column, clicking the "**View**" link will redirect to the client's GPRA list screen if the staff member is currently in the same context agency as the client. If the staff members' context agency is different than the client, clicking the "View" link will display the following error message, *"This client does not exist in the context agency. Please change your context agency to view the client."*

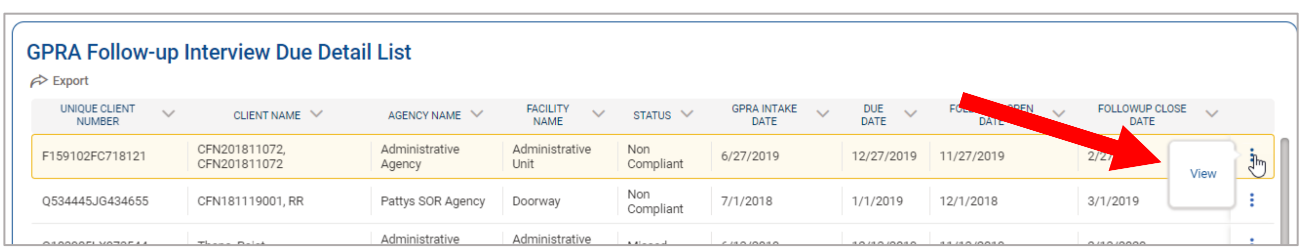
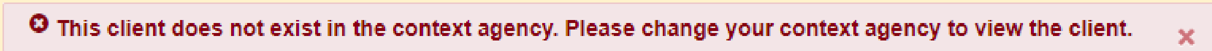


Figure 4-8: GPRA Follow-up Due Detail, View link

Note: If you have access to multiple agencies, make sure you're in the correct context agency to view the client record. Otherwise, the following error message will be displayed.

"This client does not exist in the context agency. Please change your context agency to view the client."



GPRA Follow-up Interview

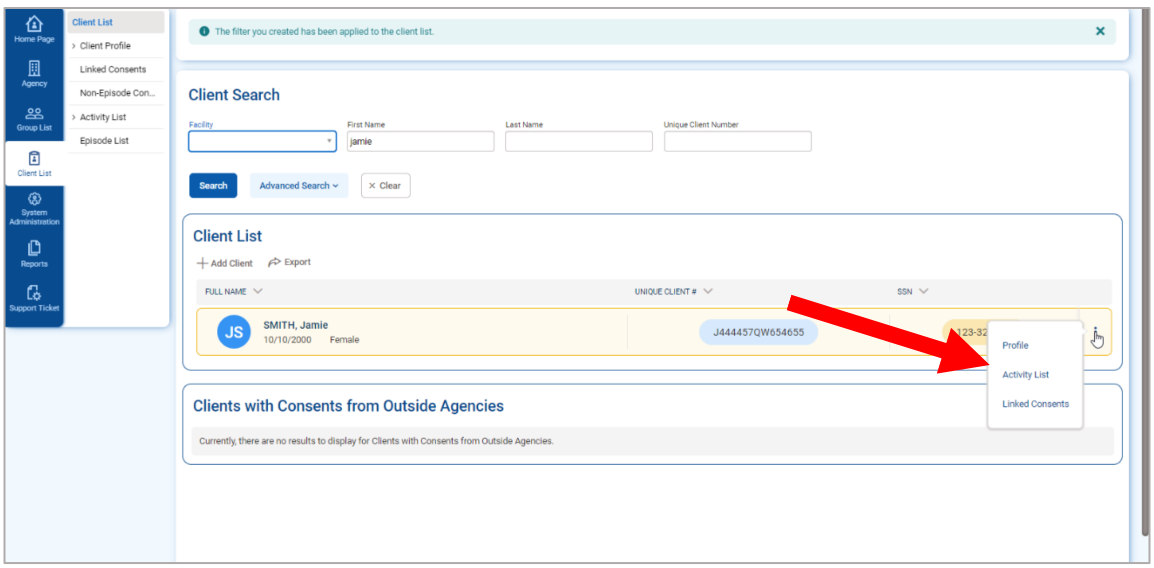
Where:* *Client List* > *Activity List* > *GPRA* > *GPRA Follow-up

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.

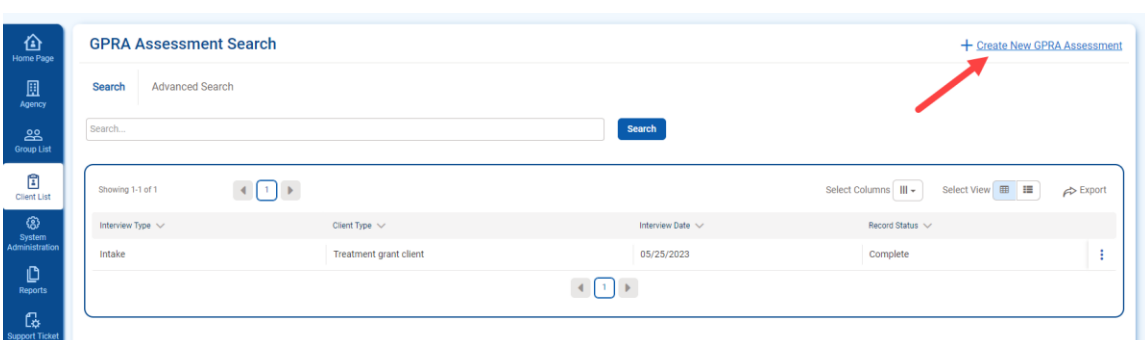
Note: If a follow-up interview has been conducted, **sections B through G** and **I** must be completed.

If the follow-up interview has ***not*** been 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. Fill out the pop up information, and select 6-month Follow Up for Interview Type.

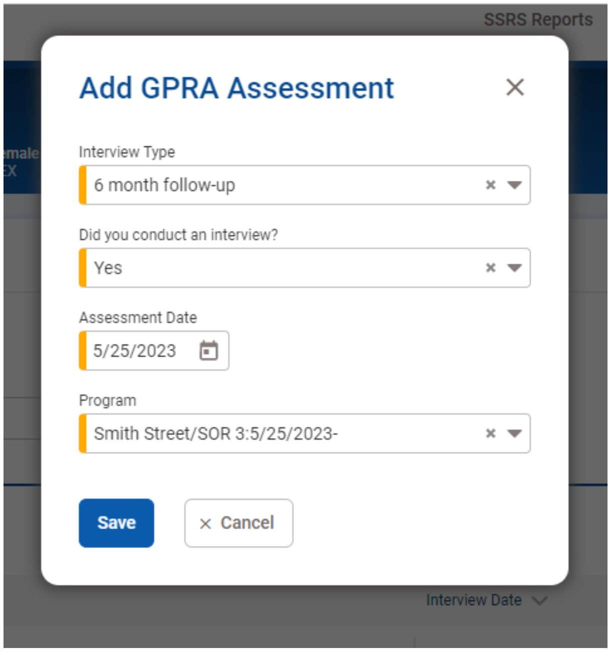


Figure 4-9: GPRA list, Add GPRA Follow-up link

5. The system will display a confirmation screen stating, "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.

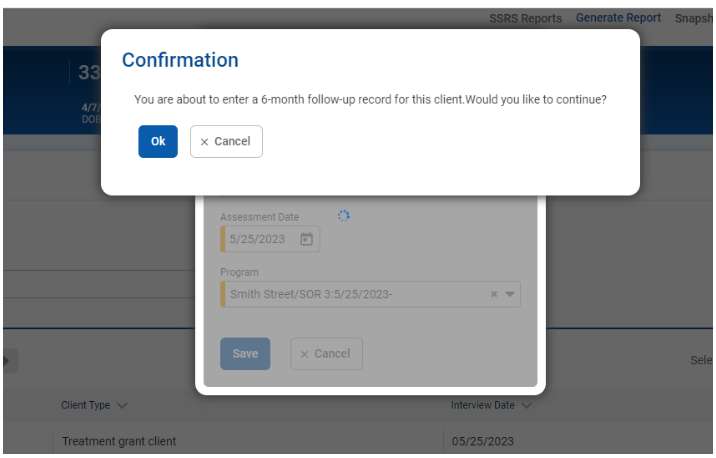
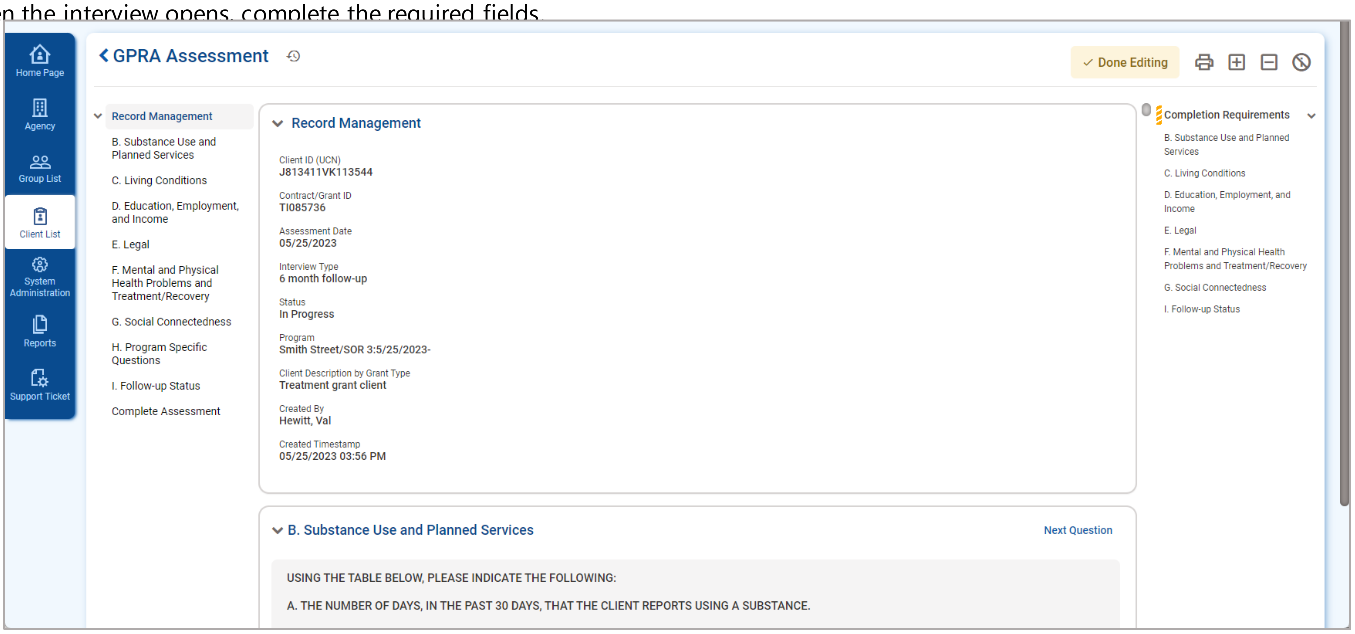
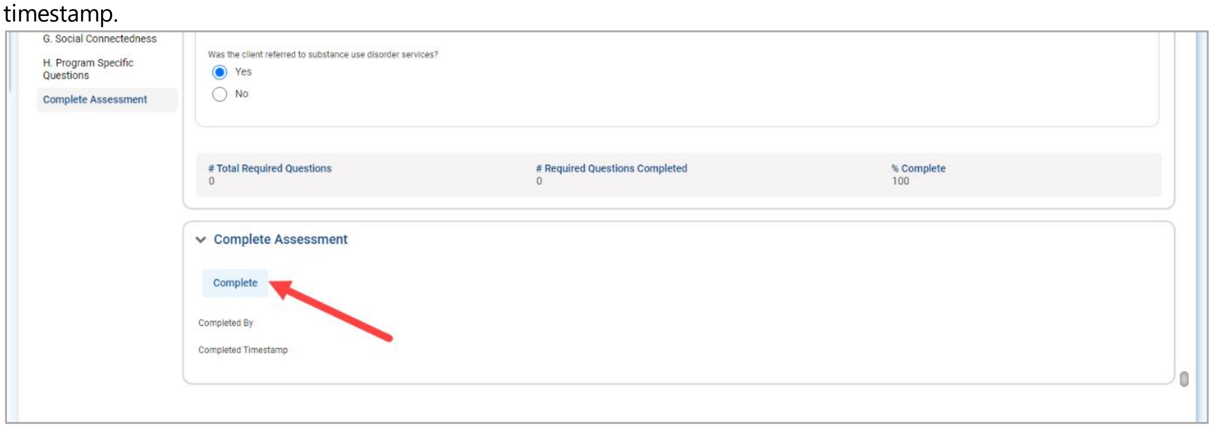


Figure 4-10: Follow-up interview confirmation screen

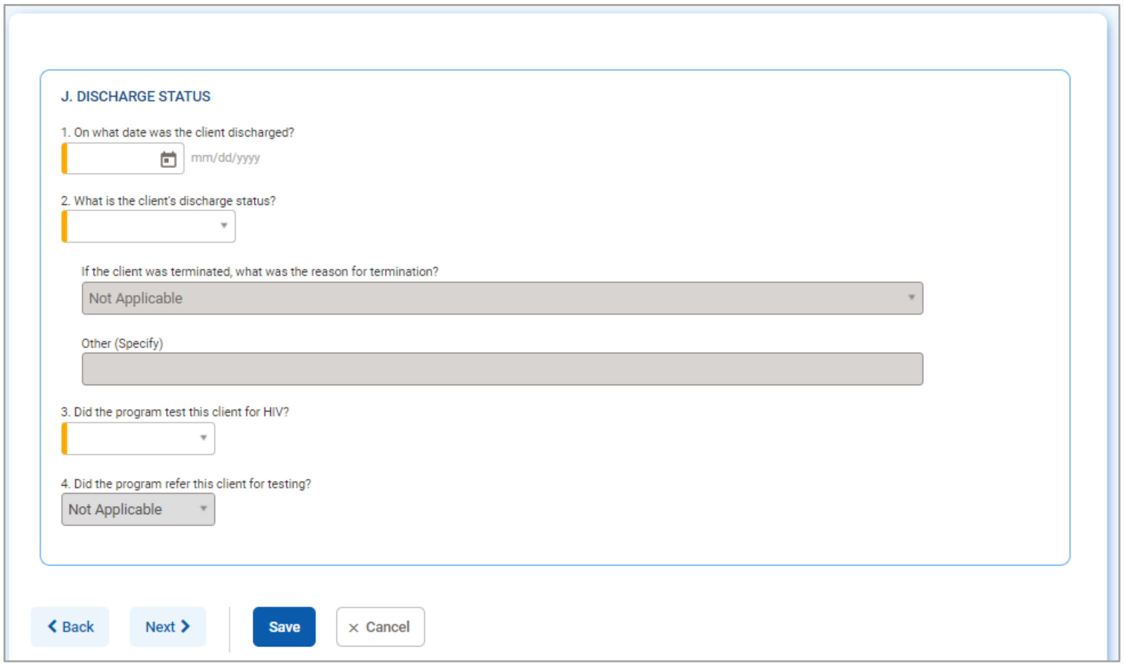
When the interview opens, complete the required fields.



6. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Complete**. This will lock the assessment, and enter the user who completed it, with a timestamp.



If the GPRA Follow up interview was conducted within the 5 to 8 month window, and if no GPRA Discharge exists for this client's grant episode, then the system will display a confirmation screen asking if you would like to create a GPRA Discharge interview with the same information as the GPRA Follow up interview. Select **Yes** and the GPRA Discharge will automatically be created. It is recommended that you review the newly created GPRA Discharge interview and make any updates as necessary.


J. DISCHARGE STATUS
1. On what date was the client discharged?
mm/dd/yyyy
2. What is the client's discharge status?
If the client was terminated, what was the reason for termination?
Not Applicable
Other (Specify)
3. Did the program test this client for HIV?
4. Did the program refer this client for testing?
Not Applicable
Back
Next
Save
Cancel

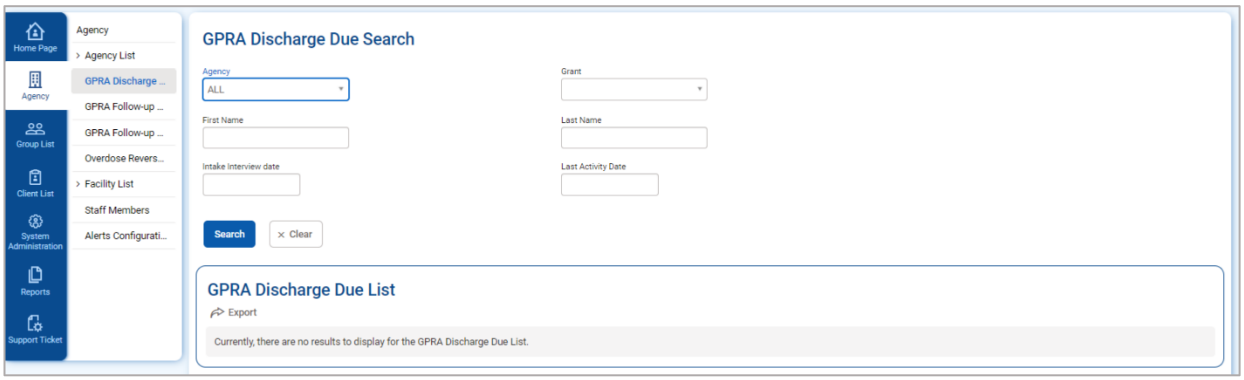
GPRA Discharge Due Screen* Will be updated for SOR 3 in Phase 3 Release

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.

Table 4-2: GPRA Discharge Due Screen Search Filters

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 III 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.

GPRA Discharge Interview

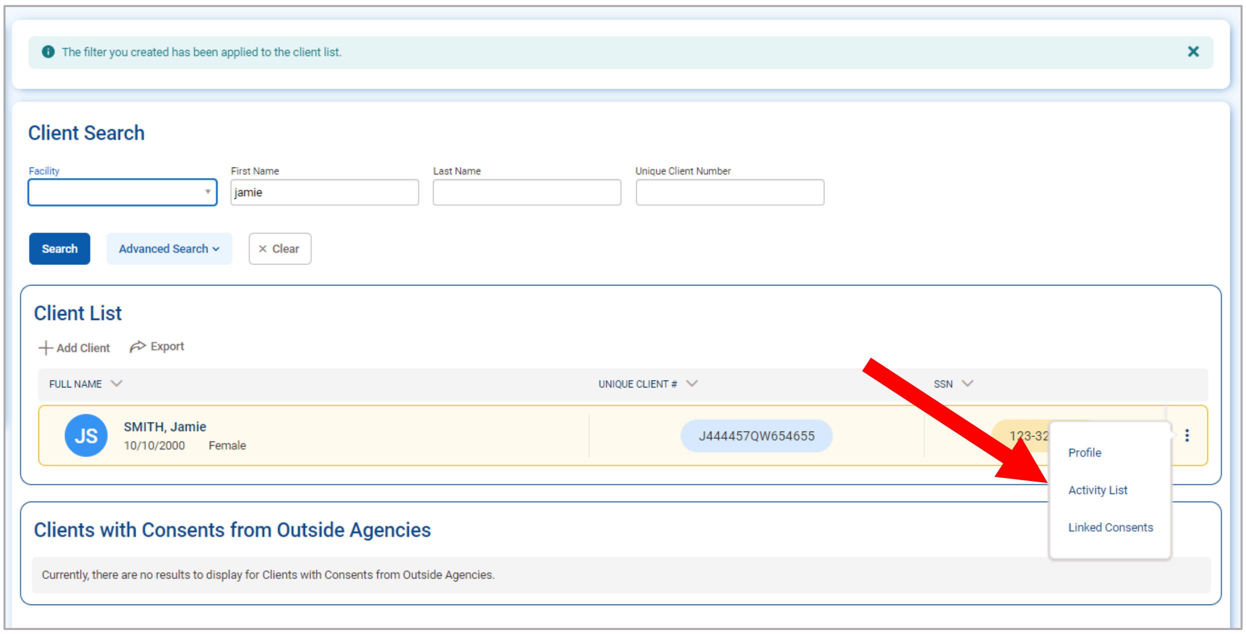
Where: Client List > Activity List > GPRA > GPRA Discharge

To add a discharge record, follow the steps below.

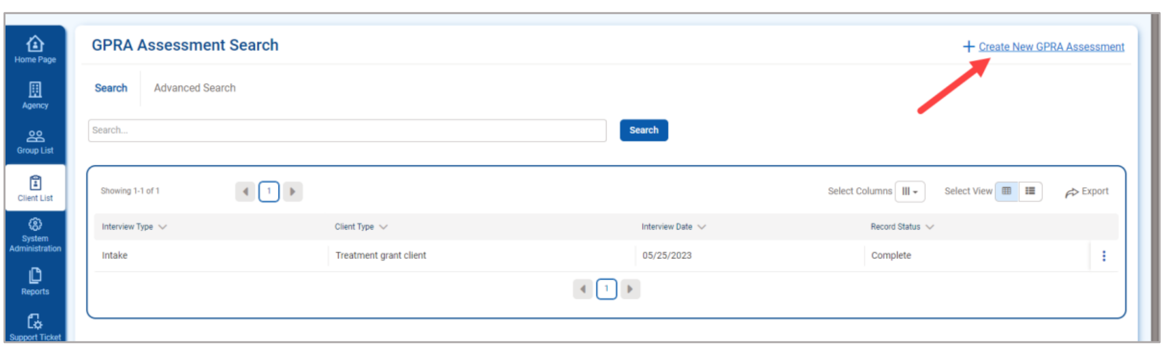
Note: If a Discharge interview has been conducted, **Sections A through G**, **J** and **K** must be completed.

If the Discharge interview ***has not*** been conducted, **Sections A, J** and **K** must be completed.

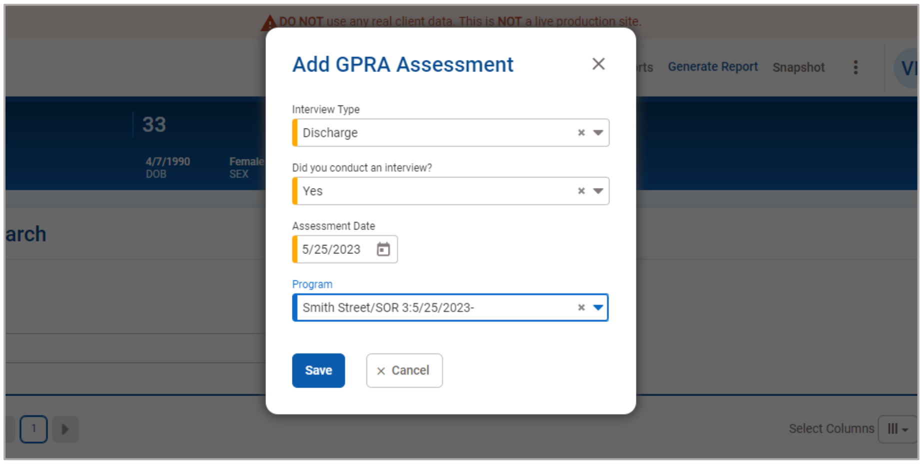
1. To access the GPRA interview, select a client from the **Client List**, point to the ellipsis icon in the Actions column, and then click **Activity List**.



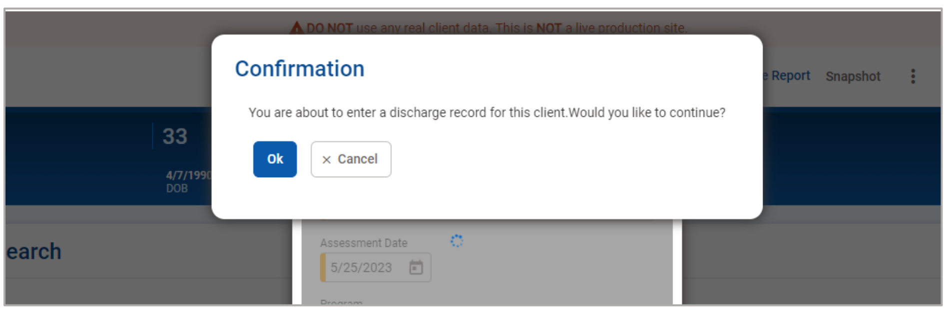
2. On the left menu, click **GPRA**.
3. On the GPRA List screen, click **+Create New GPRA**.



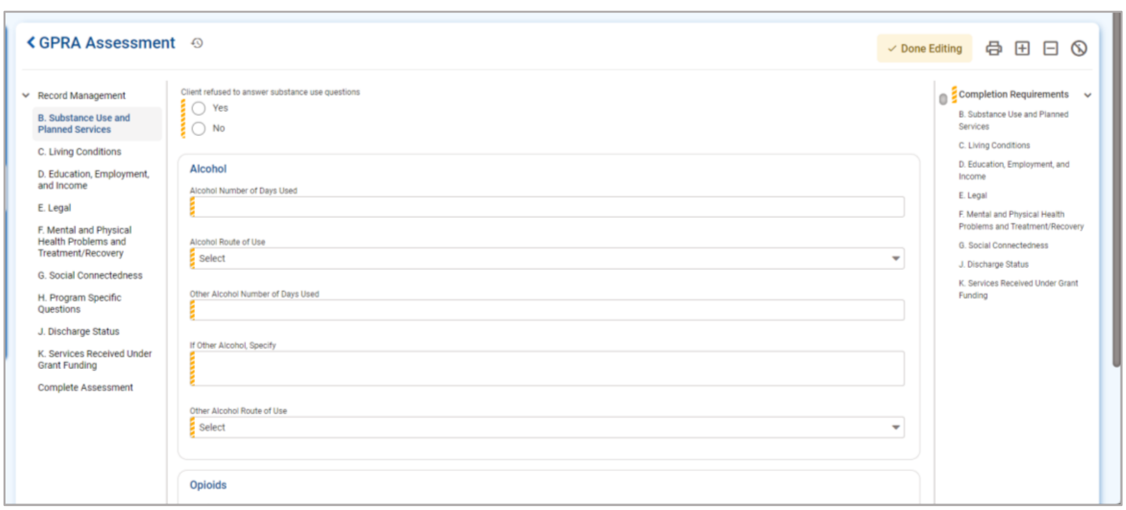
4. The assessment pop up will show. Complete the required fields and click the **SAVE** button to progress to the next screen. If the interview was not conducted (answered "No" to the question "Did you conduct an interview?"), clicking the Save button will display Discharge Status.



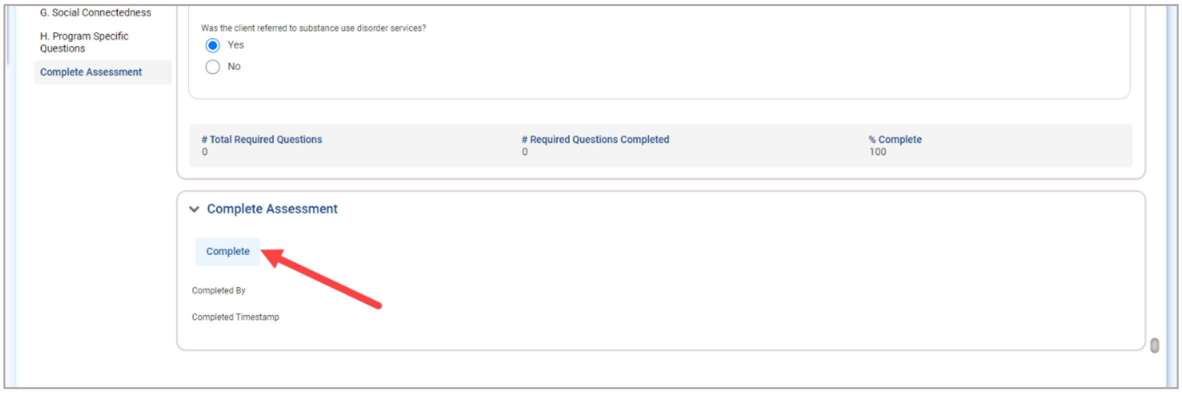
5. Confirm you are about to enter a discharge record by clicking Ok.



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.

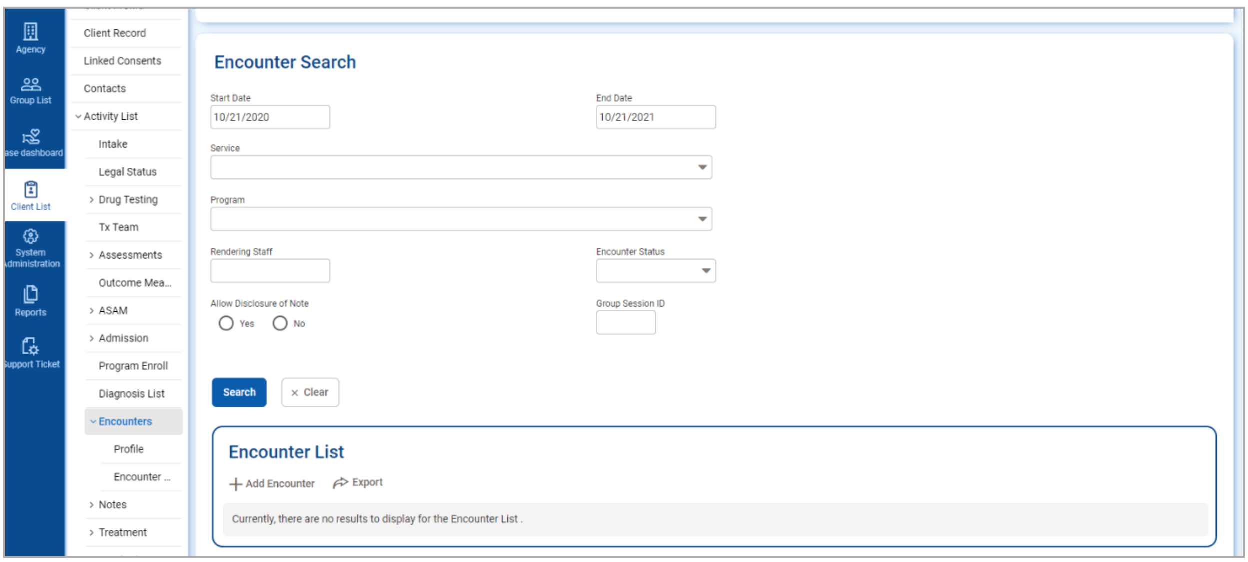
Part 5: Encounters

***Where:* Client List > Activity List > Encounters**

The Encounters screen allows staff members to view and search through an individual client's encounter records for services received at the current location. In addition, new encounter records can also be added through this screen.

Follow the steps below to view the Encounters screen.

1. On the left menu, click **Client List** and search for a client.
2. Hover over the Actions column, and click **Activity List**.
3. On the left menu, click **Encounters**. This will display the Encounter Search/List screen.
4. To view previous encounters, complete the search fields and click **Search**.

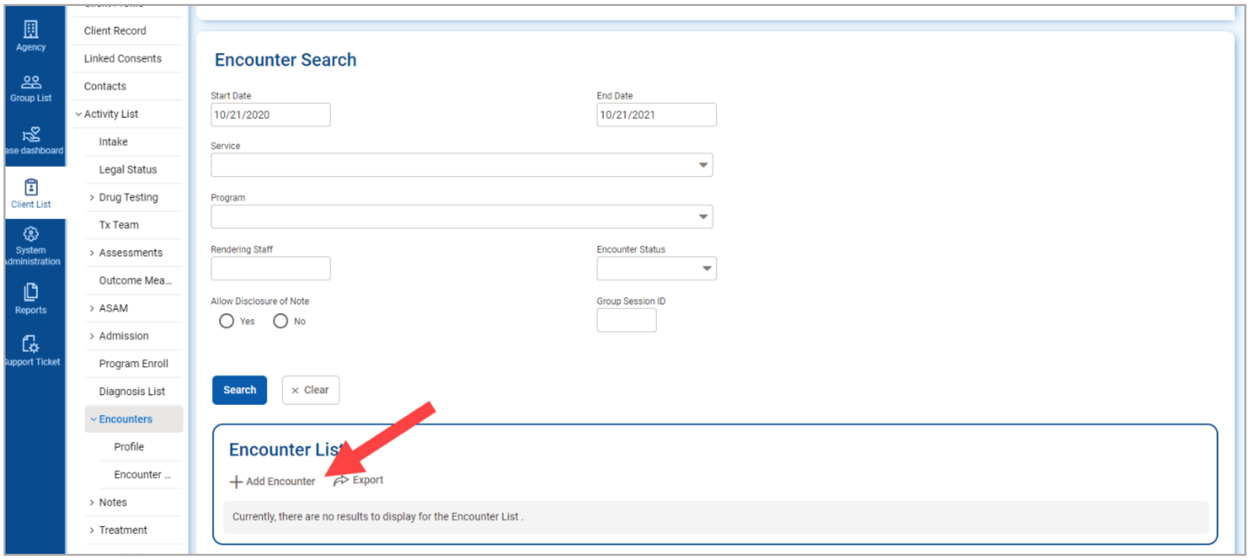


Create Encounter Notes

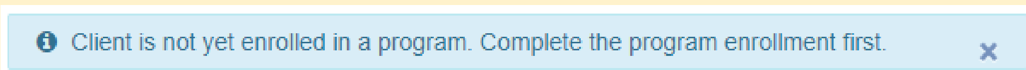
***Where:* Client List > Activity List > Encounters**

Follow the steps below to add an Encounter for a client.

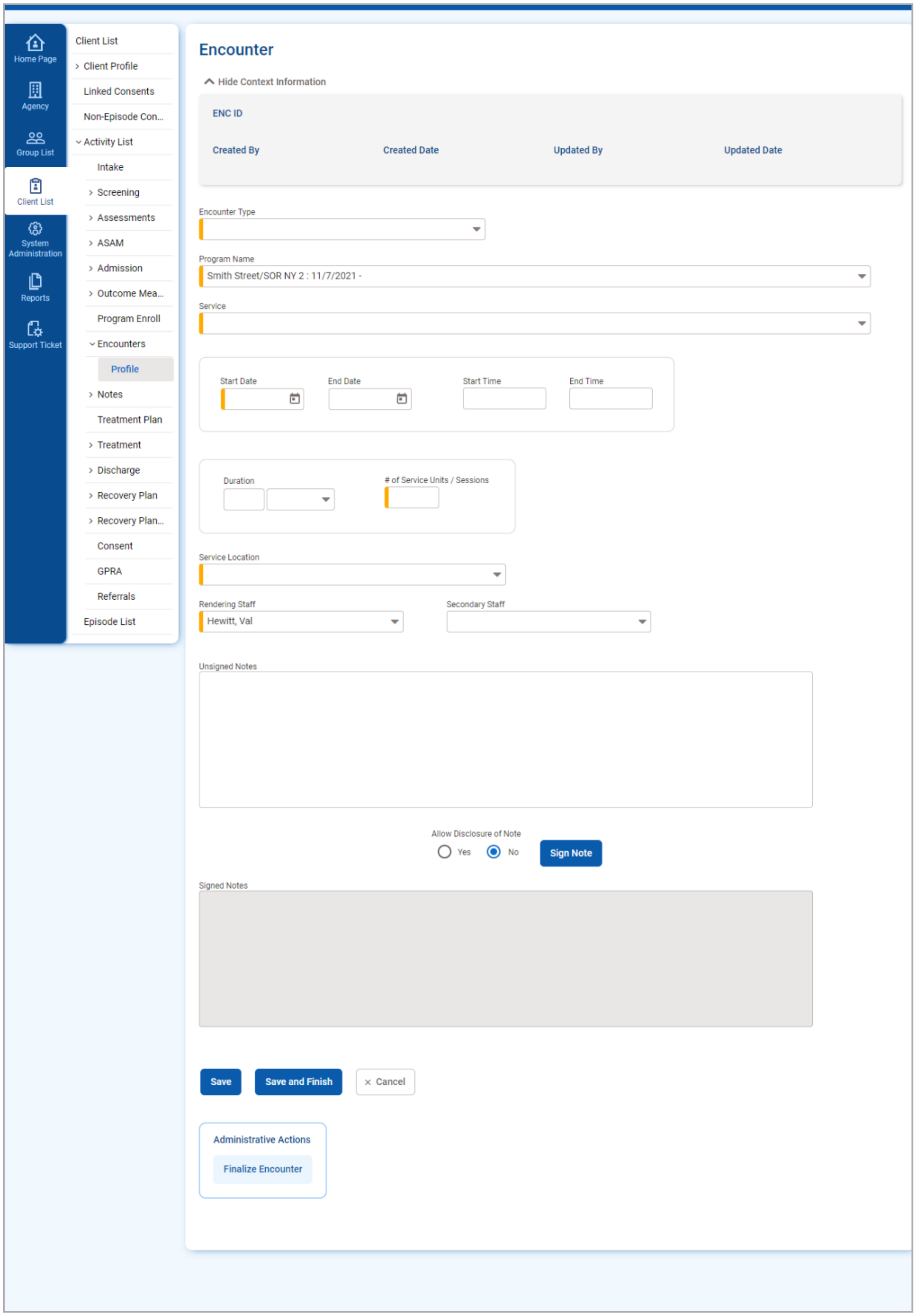
5. On the left menu, click **Client List** and search for a client.
6. Hover over the Actions column, and click **Activity List**.
7. On the left menu, click **Encounters**. This will display the Encounter Search/List screen.
8. Click +**Add Encounter**. This will open the Encounter Profile screen.



Note: The client must be enrolled in a program before an encounter note can be added. If the client has not been enrolled in a program, the following message will appear on screen:

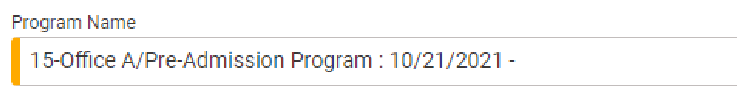
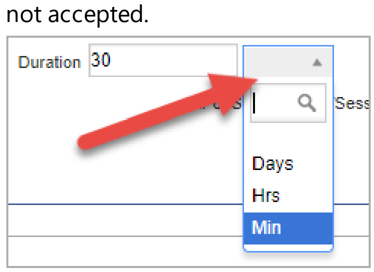


Encounter Profile



9. Complete the fields on the Encounter Profile screen. See table below for information on each field.

Table 5-1: Encounter Profile fields

Field	Description
Note Type	Select from the drop-down field.
ENC ID	Read-only field. When the encounter is saved, this field will display its unique ID number.
Created Date	Read-only field. This field will display the date and time when the encounter is saved.
Program Name	This field will pre-populate with the client's current program enrollment name and program enrollment start date. 
Service	Select a service from the drop-down list.
Service Location	Select an option from the drop-down list. This field may be pre-populated if this information was added to the facility profile.
Start Date	Enter the date when this service was rendered. **Note**: The start date for this encounter must occur within the same program enrollment period. Encounter date cannot be before the intake date.
Start Time	Enter the time when this service was rendered. This field may be optional or required depending on the selected service. Some services may be set up to require this information.
End Date	Enter the date when this service ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information. **Note**: The end date for this encounter must occur within the same program enrollment period.
End Time	Enter the time when this encounter ended. This field may be optional or required depending on the selected service. Some services may be set up to require this information.
Duration	In the Duration field, type an integer to record time spent for this encounter. In the Duration drop-down field, select the unit of time. **Note**: The duration field will only accept whole numbers. Decimals (e.g., 0.5) are not accepted.  These fields may be optional or required depending on the selected service. Some services may be set up to require this information.
# of Service Units/Sessions	Type an integer representing the number of units or sessions spent for this service.

Field	Description
	Your administrator may have established policy guidelines regarding how services are recorded.
Rendering Staff	This field will pre-populate to the user logged in. To change the rendering staff, select the correct staff member from the drop-down list.
Secondary Staff	(Optional) In the drop-down list, select the secondary staff for the Rendering Staff member, if applicable.

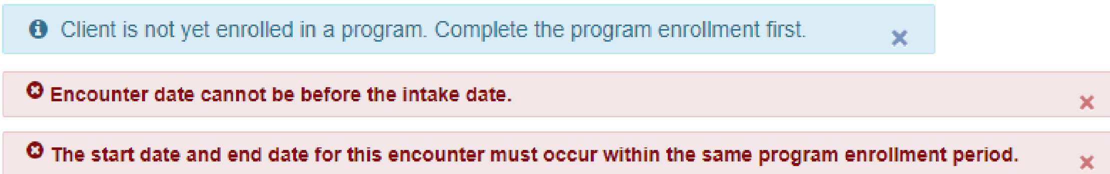
Encounter Notes

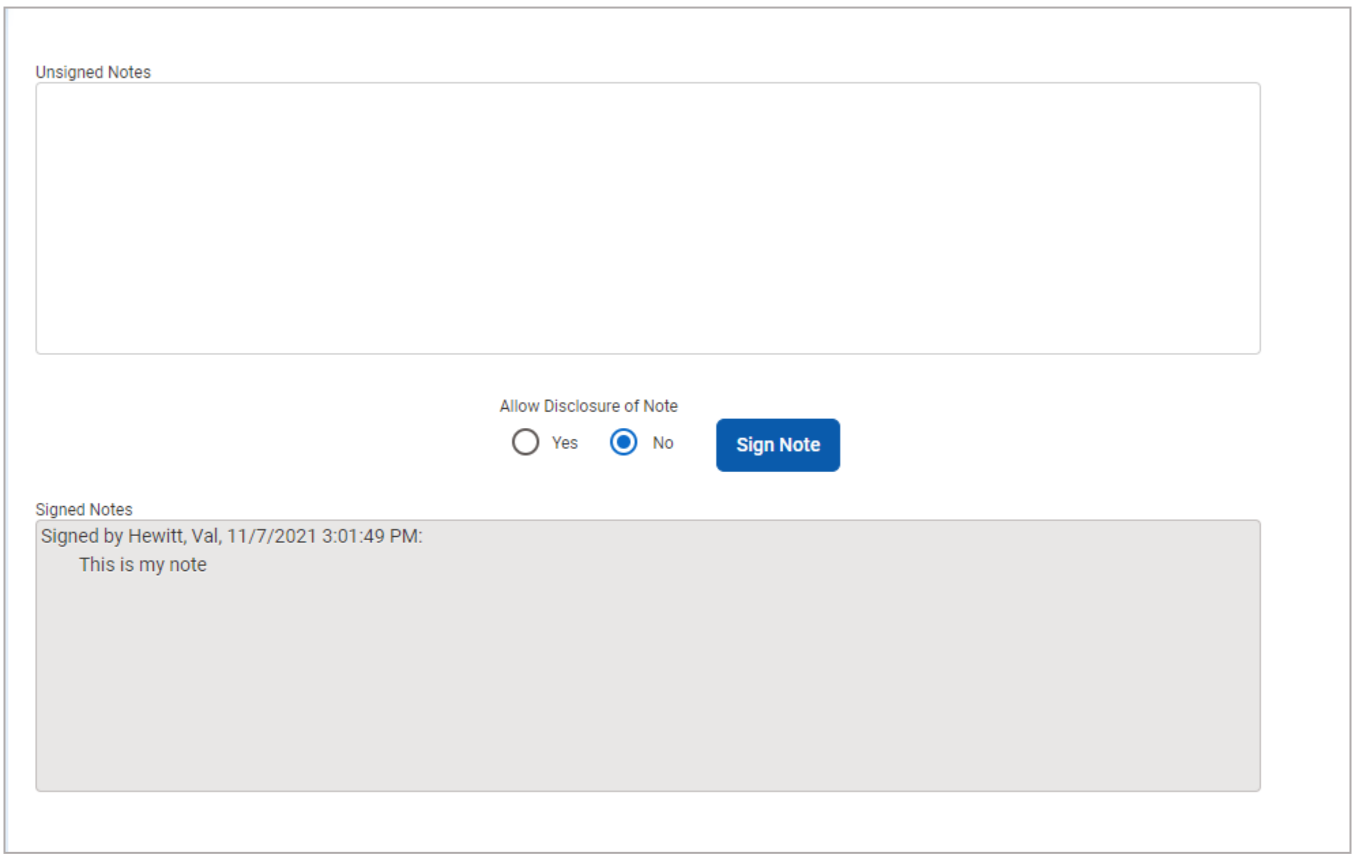
The **Encounter Notes** section of the Encounter allows staff to enter notes related to the time spent with the client.

1. On the **Encounter Notes** screen, in the **Unsigned Notes** text box, type notes regarding the service provided and click **Sign Note.**

Encounter Error/Warning Message Examples

- Client is not yet enrolled in a program. Complete the program enrollment first.
- Encounter date cannot be before the intake date.
- The start date and end date for this encounter must occur within the same program enrollment period.

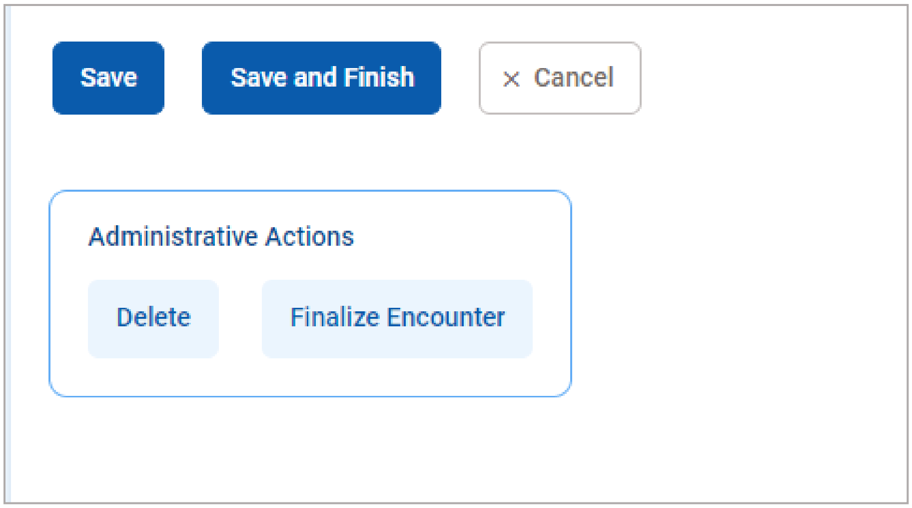




2. Click **Save**.

Finalize Encounter (optional).

To complete the encounter, Click Finalize. This will lock the encounter so that the fields cannot be edited.


Save
Save and Finish
Cancel
Administrative Actions
Delete
Finalize Encounter

Part 6: Consent and Referrals

Create Client Consent Record

Where: Client List > Activity List > Consent

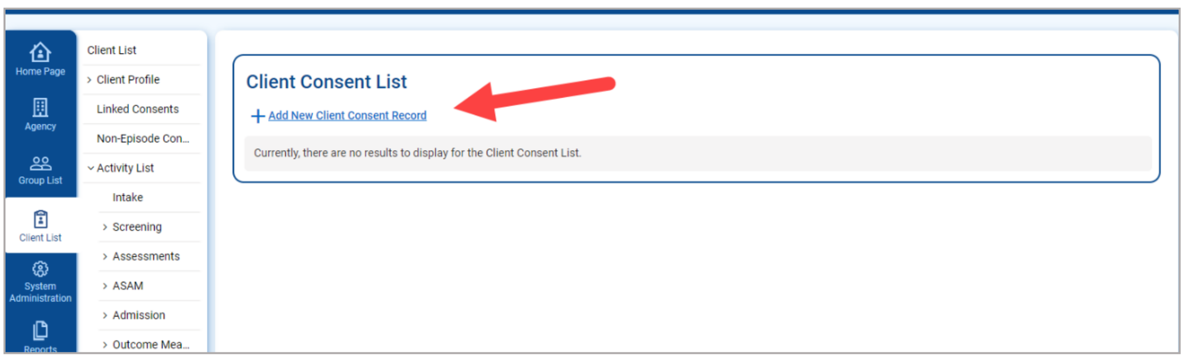
The consent is a formal process adhering to 42 CFR Part 2, which governs the sharing of client information between agencies and facilities using WITS. A consent may also be used to record the sharing of information (on paper) with agencies who do not use WITS, making the consent part of the electronic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

1. On the left menu, click **Client List** and search for a client.

1. Locate the client, hover over the Actions column, and then click **Activity List**.

2. On the left menu, click **Consent**.

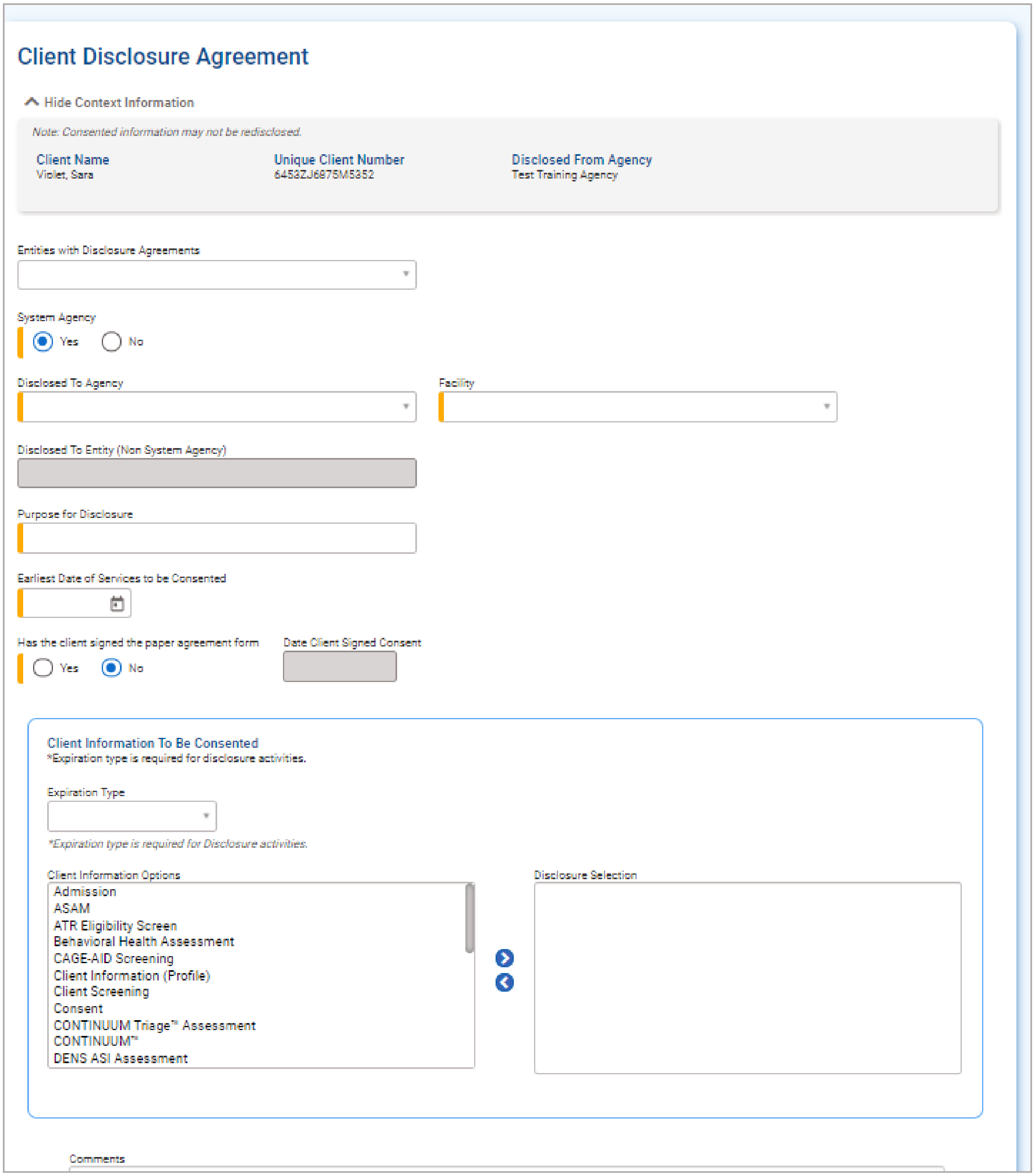
3. Click the **Add New Client Consent Record** link.



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

Table 6-1: Client Disclosure Agreement 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.



5. 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.

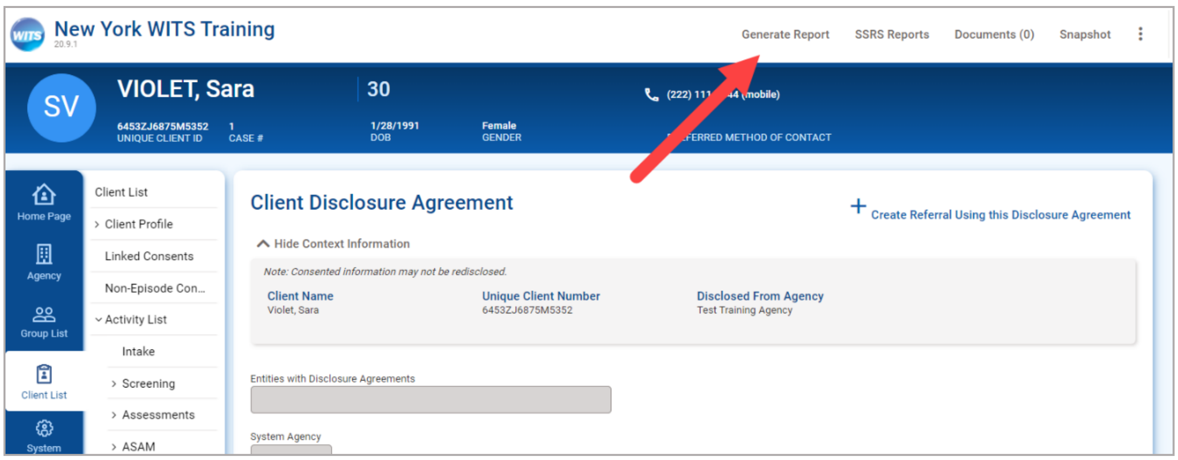
Table 6-2: Client Information To Be Consented fields

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.

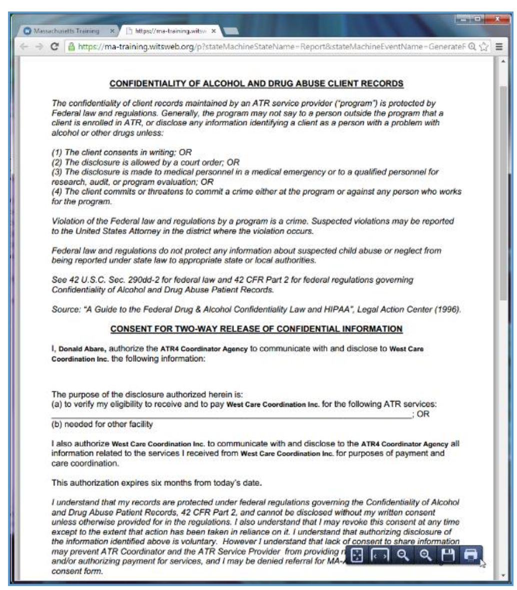
6. When all required fields are complete, click **Save**.

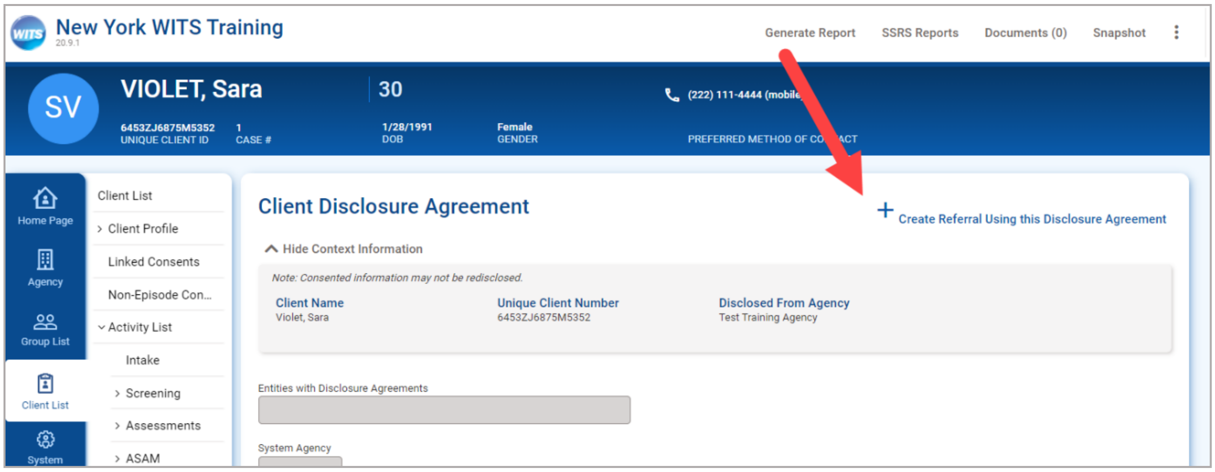
Print the Client Consent Form

7. 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.



8. 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
9. Click **Save** and stay on this screen (notice the fields are now grayed out).
10. 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.
11. Click the link, **Create Referral Using this Disclosure Agreement**, and continue to the next section.




New York WITS Training
Generate Report
SSRS Reports
Documents (0)
Snapshot
VIOLET, Sara
30
(222) 111-4444 (mobile
6453ZJ6875M5352
UNIQUE CLIENT ID
1
CASE #
1/28/1991
DOB
Female
GENDER
PREFERRED METHOD OF CONTACT
Home Page
Agency
Group List
Client List
System
Client List
Client Profile
Linked Consents
Non-Episode Con...
Activity List
Intake
Screening
Assessments
ASAM
Client Disclosure Agreement
Create Referral Using this Disclosure Agreement
Hide Context Information
Note: Consented information may not be redisclosed.
Client Name
Violet, Sara
Unique Client Number
6453ZJ6875M5352
Disclosed From Agency
Test Training Agency
Entities with Disclosure Agreements
System Agency

Referrals

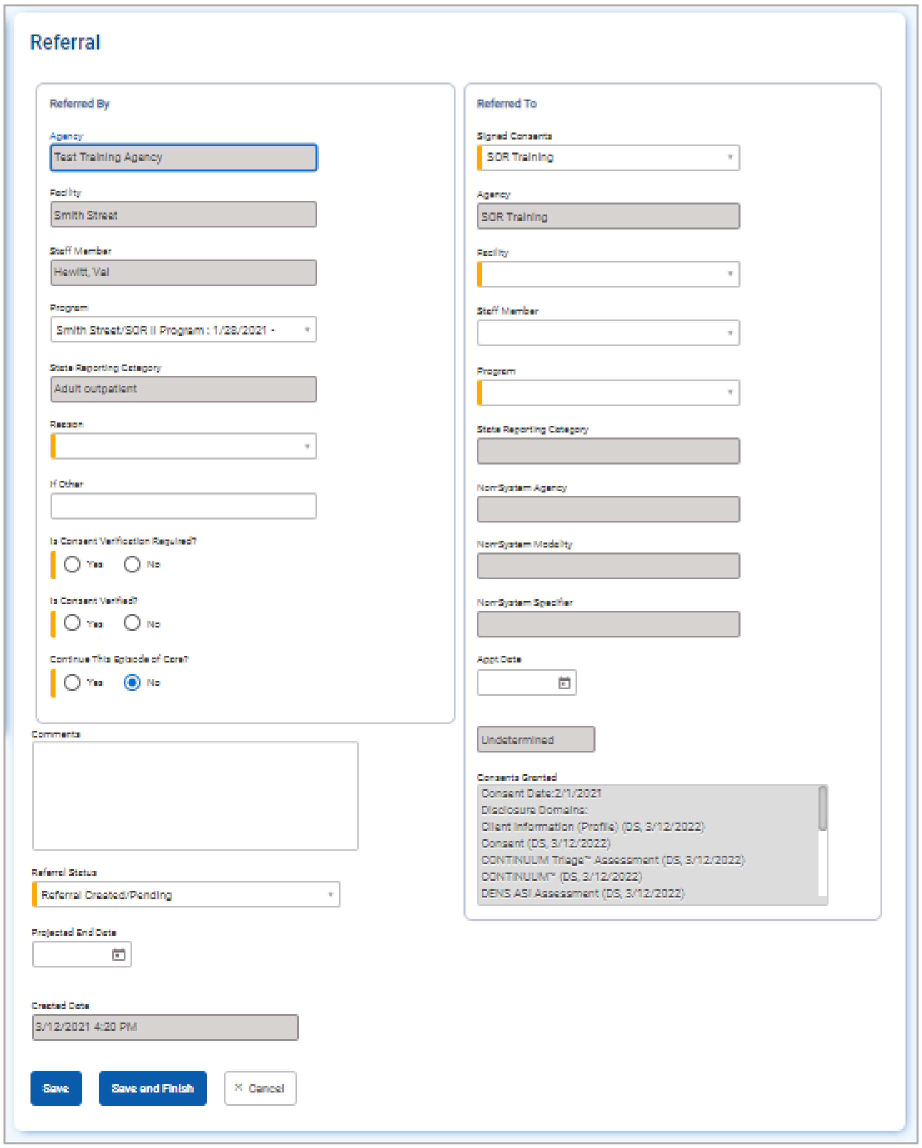
Create a Client Referral

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

Continuing from 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 done 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 program with the SOR III grant to another program with the SOR III grant.
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 No.
Referral Status	State of the referral (this should be "Referral Created/Pending").
Created Date	Date client is referred.

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 III program.

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

Viewing Referrals

Referrals In

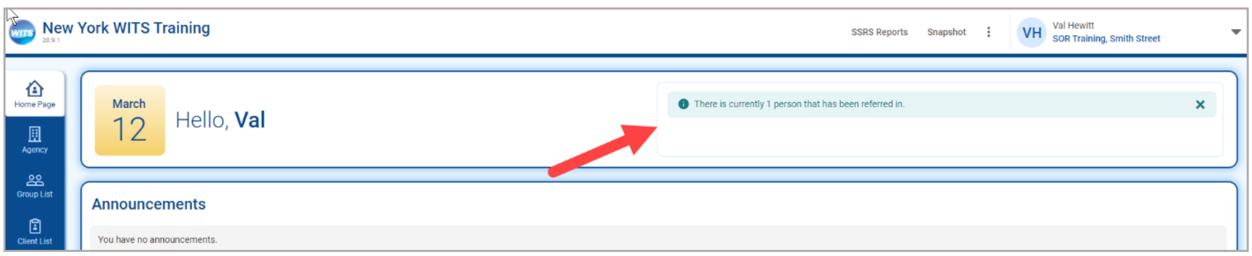
Where: Agency > Agency List > Referrals > Referrals In

Whenever clients are referred in to your agency from another agency, a message will appear on the Home Page as shown in **Error! Reference source not found.**. 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.

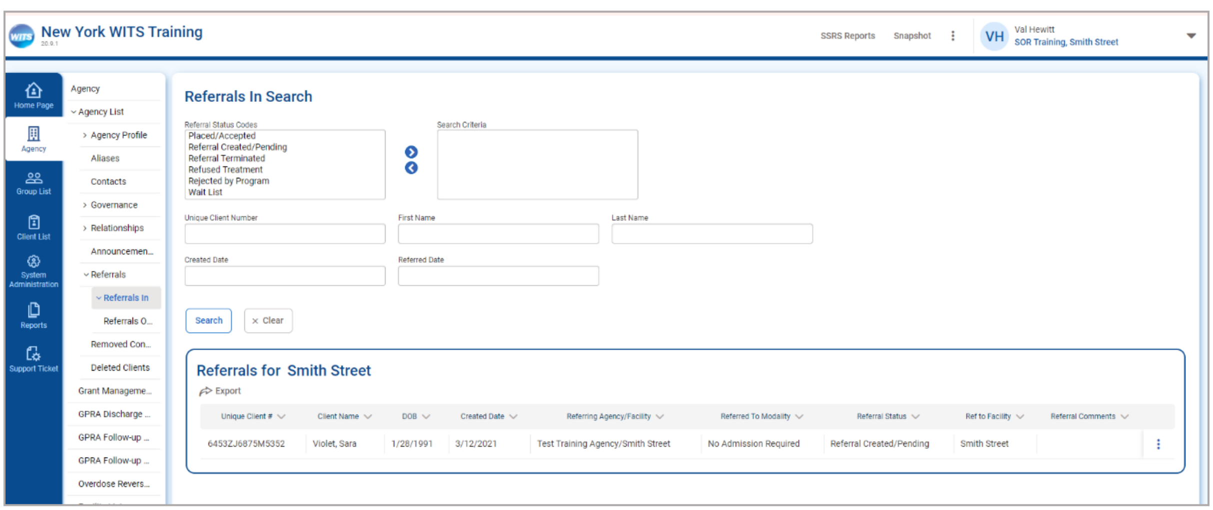
Role Needed:

- Referrals (Full Access)

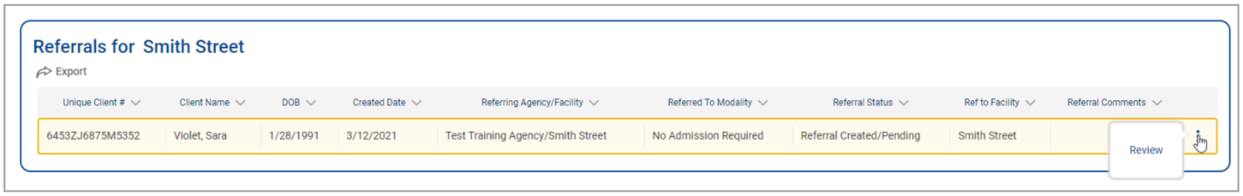
Note: Only users with the Referrals (Full Access) role will see Referrals left menu link.



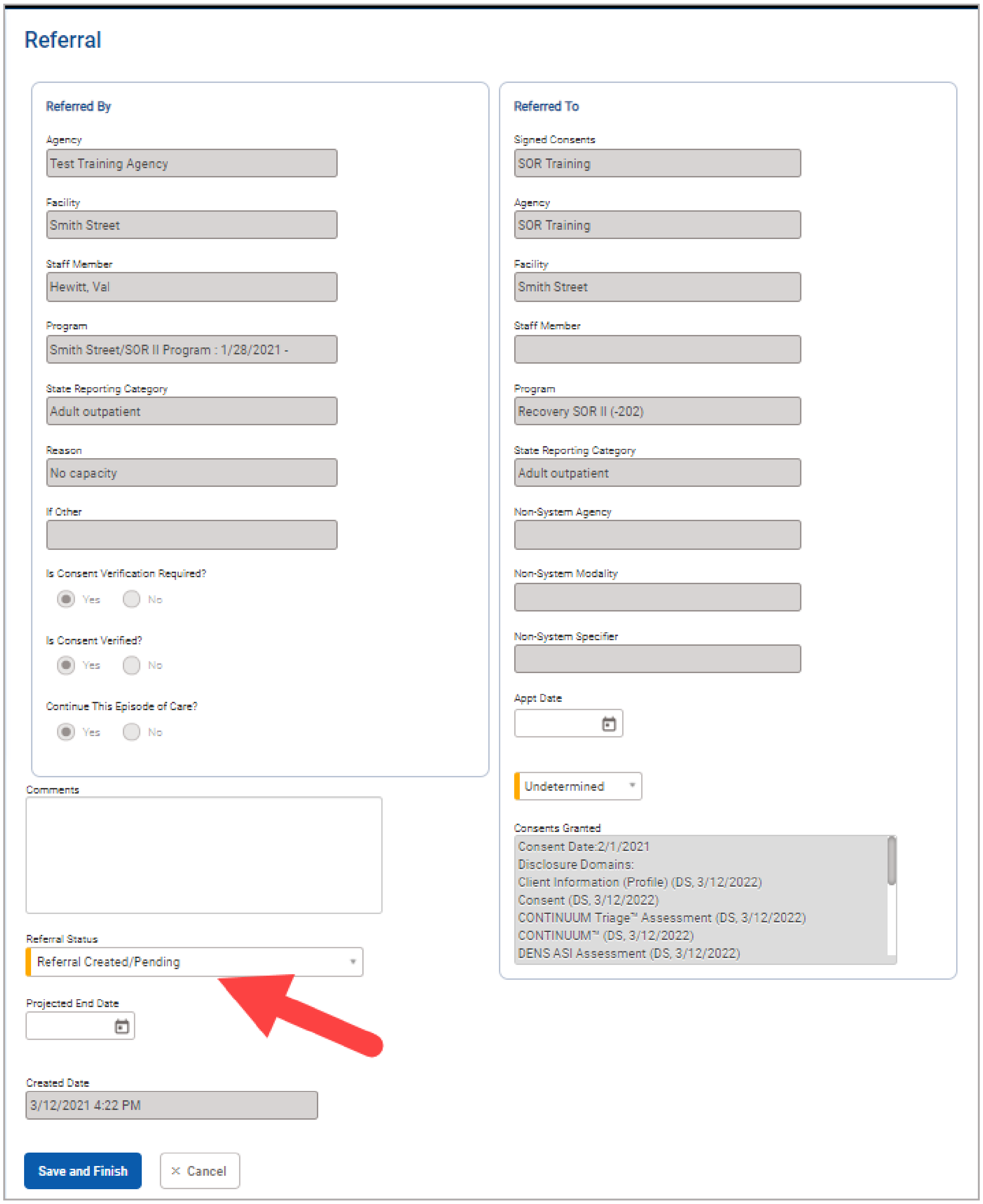
1. On the left menu, click **Agency**, click **Referrals**, and then click **Referrals In**.
2. On the **Referrals In Search** screen, in the **Referral Status Codes** field, select "**Referral Created/Pending**" and move this option to the **Search Criteria** box by clicking the mover button as shown in **Error! Reference source not found.**.
3. After selecting the search criteria, click **Go** 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.

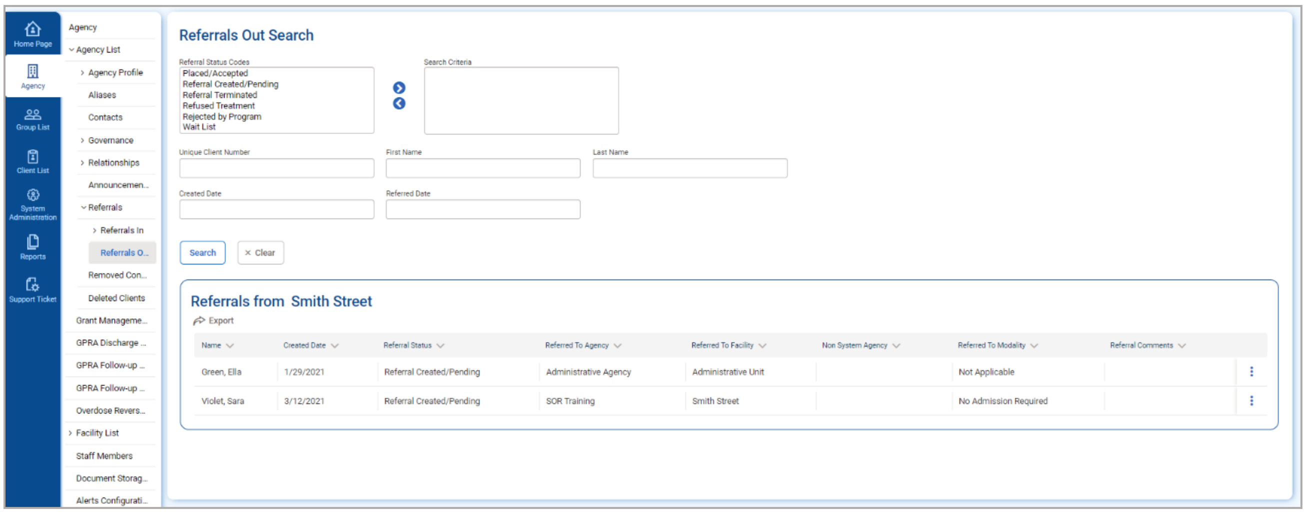
Note: Once the referral is Placed/Accepted, the client record is created within the Agency, and an Intake and Client Program Enrollment is created within the referred to Facility.

Referrals Out

***Where:* Agency > Agency List > Referrals > Referrals Out**

The Referrals Out screen is used to check on 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.



Part 7: Overdose Reversal Kits* Will be updated for SOR 3 in Phase 3 release

Where: Agency > Overdose Reversal Kit

Required Role(s):

- Overdose Reversal Kits Management (Full Access)
- Overdose Reversal Kits Management (Read Only)

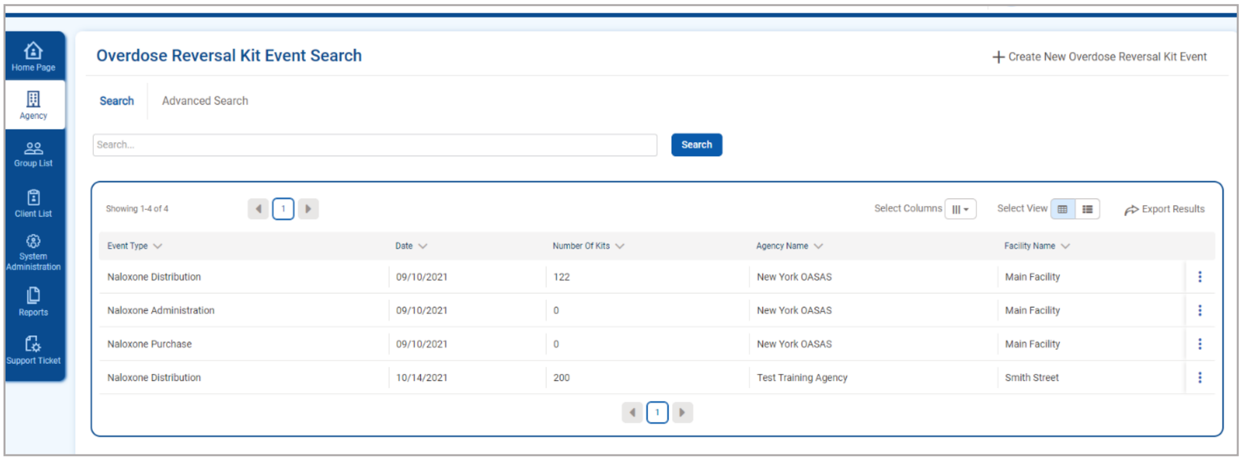
As part of the SOR reporting requirements, grantees have to provide on a quarterly basis the number of naloxone kits purchased and distributed with the SOR funds. This new module has been created to track three (3) types of events:

Event Types:

- Naloxone Purchase
- Naloxone Distribution
- Naloxone Administration

Add New Overdose Reversal Kit Event

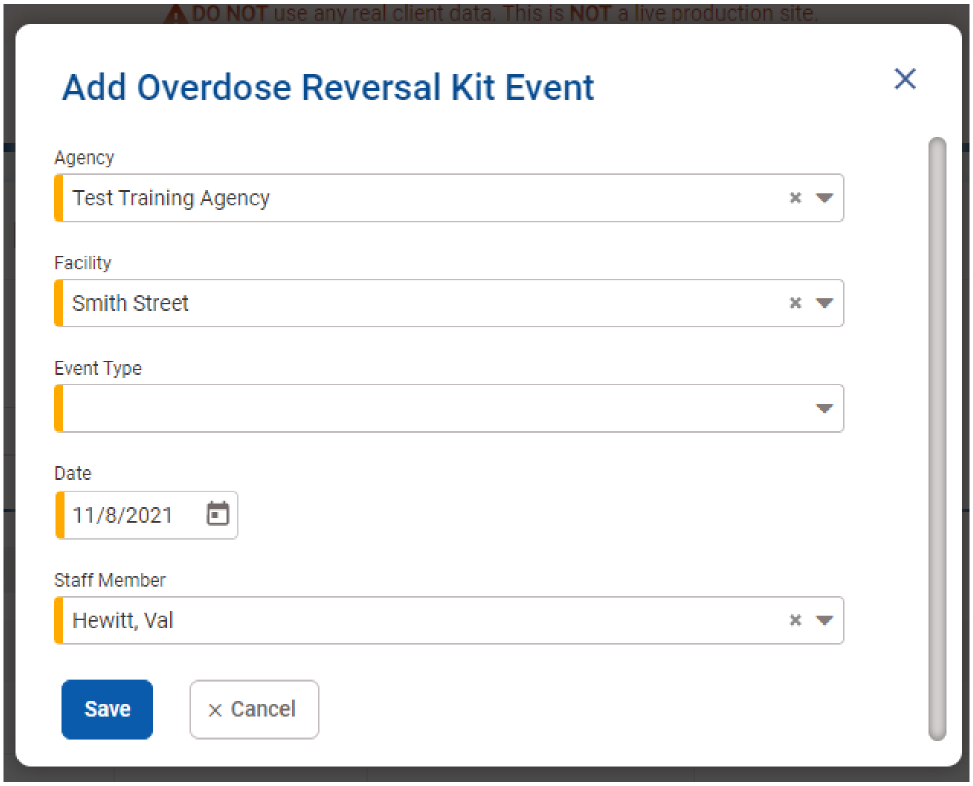
1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.



3. On the **Add Overdose Reversal Kit Event** dialog box, complete the fields as shown in the table below.

Table 7-1: Add Overdose Reversal Kit Event dialog box fields

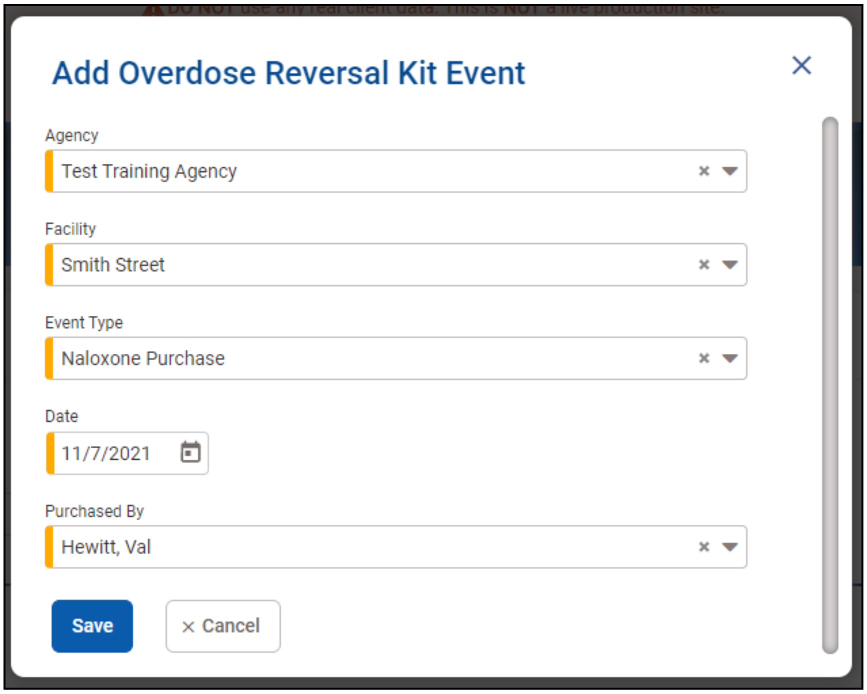
Field	Description
Agency	Defaults to the current agency name. **Note**: The selected agency cannot be updated once this dialog box is saved.
Facility	Defaults to the current facility name. **Note**: The selected facility cannot be updated once this dialog box is saved.
Event Type	Select an event type from the drop-down list. **Note**: The selected event type cannot be updated once this dialog box is saved. 
Date	Defaults to the current date.
Staff Member	Defaults to the current staff member logged in.



4. Click **Save**. This will open the Event Workspace screen.

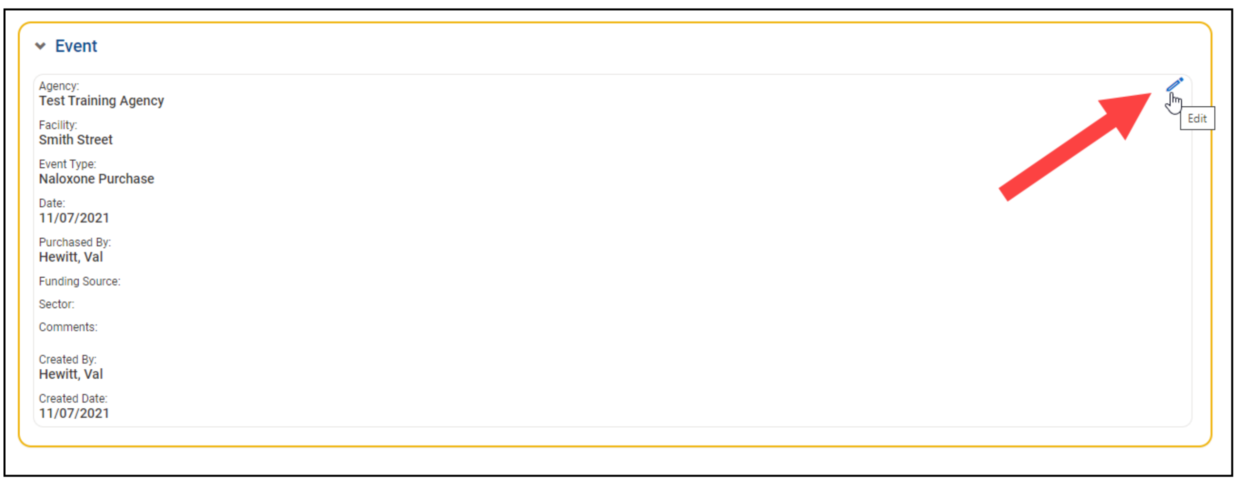
Naloxone Purchase

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. Click **Create New Overdose Reversal Kit Event**.
3. On the **Add Overdose Reversal Kit Event** dialog box, in the **Event Type** field, select **Naloxone Purchase** from the drop-down list.
4. Click **Save**.



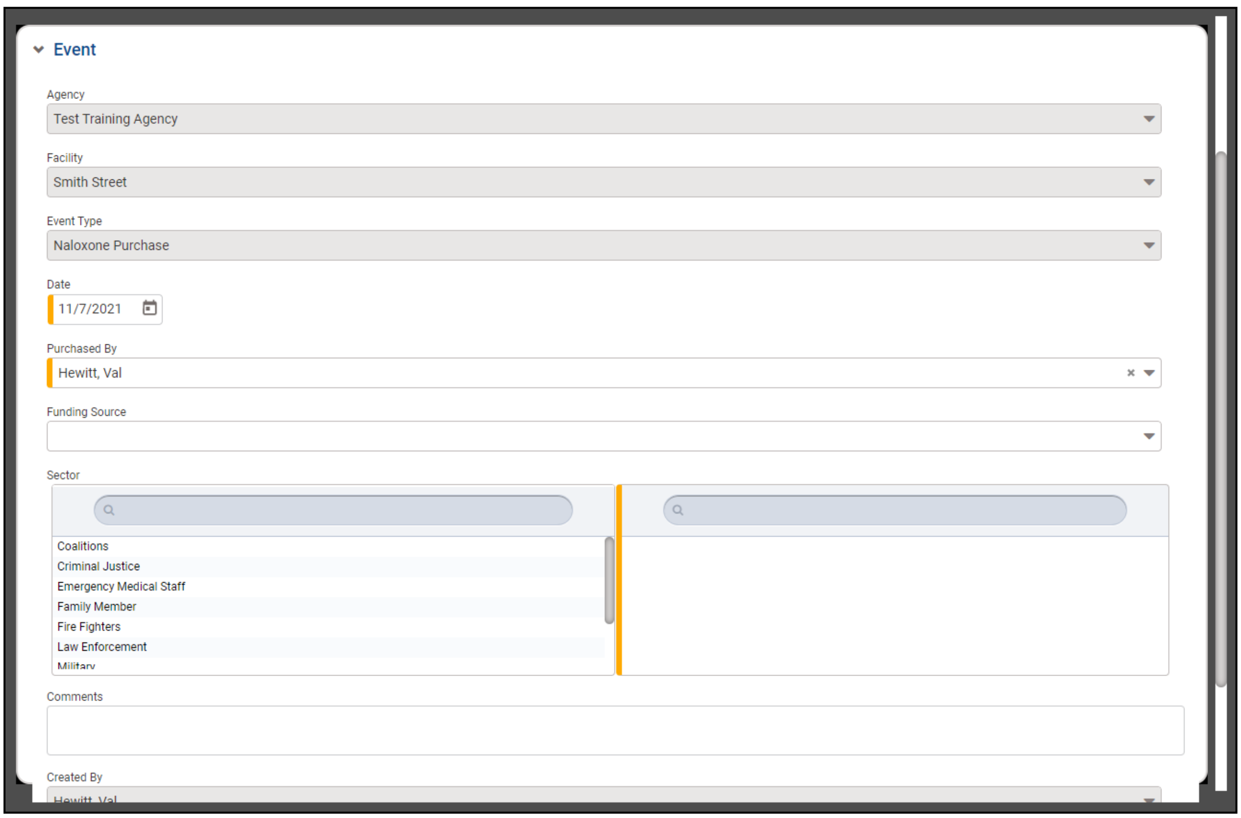
Panel: Event

1. On the **Purchase Event Workspace** screen, in the **Event** panel, click the **pencil icon** to edit the event information.



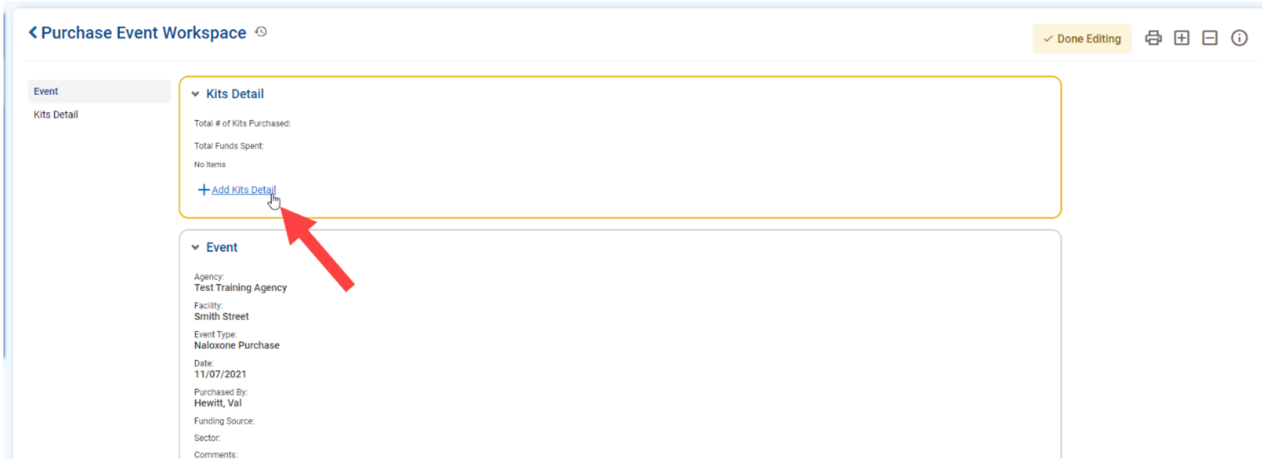
Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field.
Date	Update the date as applicable.
Purchased By	Update the name as applicable.
Funding Source	(Optional) Select appropriate value from the drop down list. SOR may be the funding source paying for this event.

Field	Description
Sector	Select one or more sectors from the left box by clicking the name of each sector. If "Other" is selected, complete the required field, **Other Description**. To remove a selected sector, click the 'X' beside the sector's name.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field displaying the user account who created the record.
Created Date	Read-only field displaying the date the record was created.



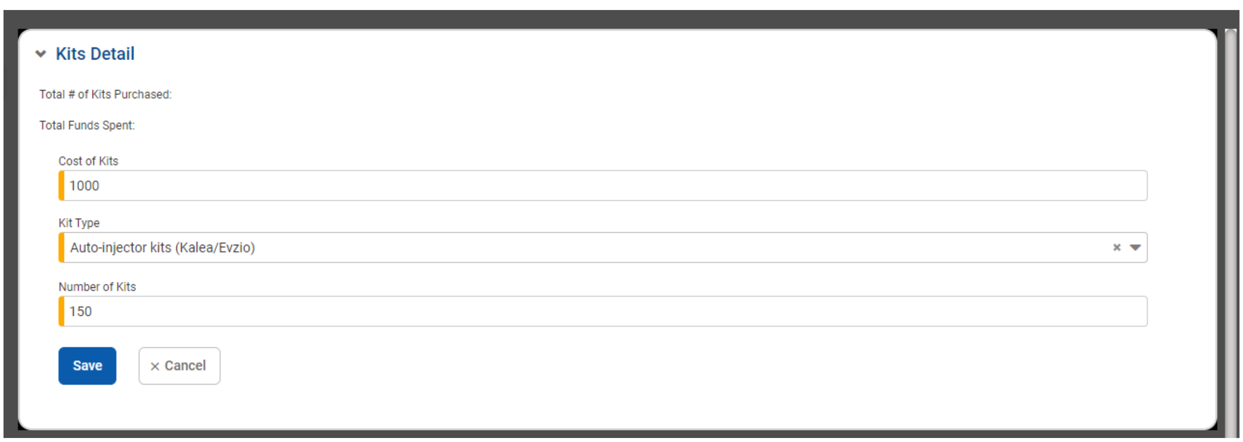
Panel: Kits Detail

2. On the **Purchase Event Workspace** screen, in the **Kits Detail** panel, click **Add Kits Detail**.

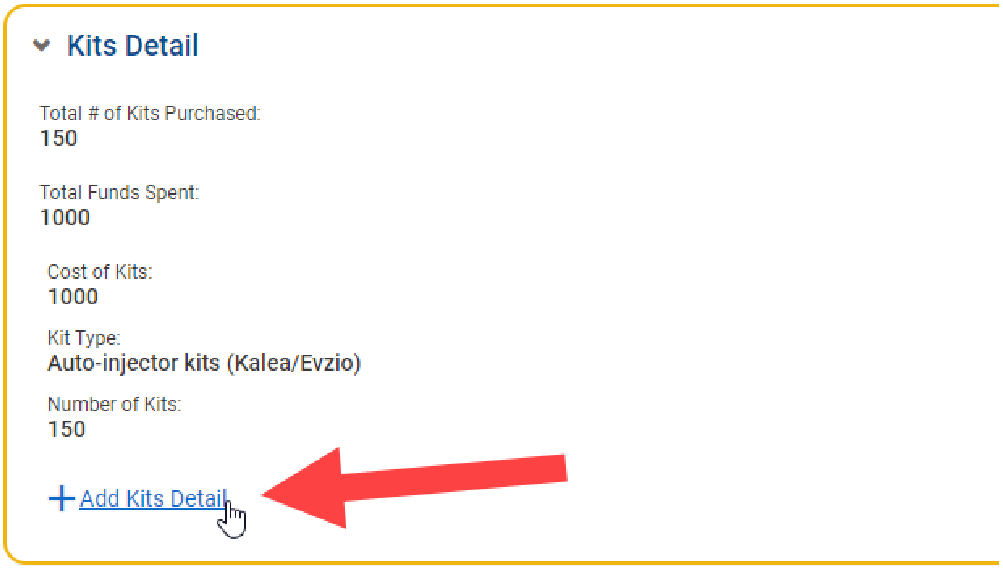


3. In the **Kits Detail** panel, update the fields as shown in the table below.

Field	Description
Kit Type	Select the type of kit from the drop-down list.
Number of Kits	Type an integer.
Cost of Kits	Type an integer (whole numbers).

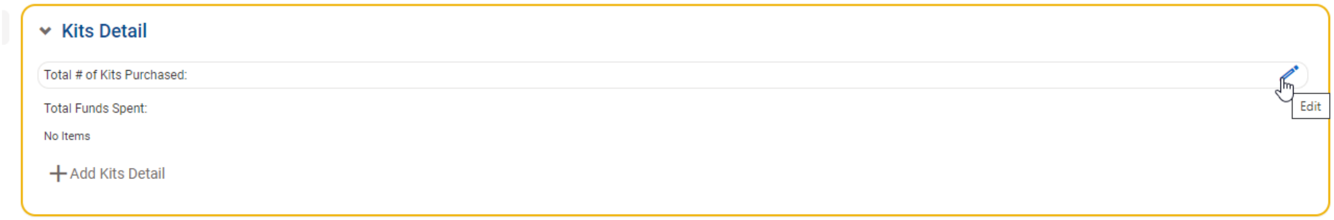


4. Click **Save**. Continue adding additional kits as needed.

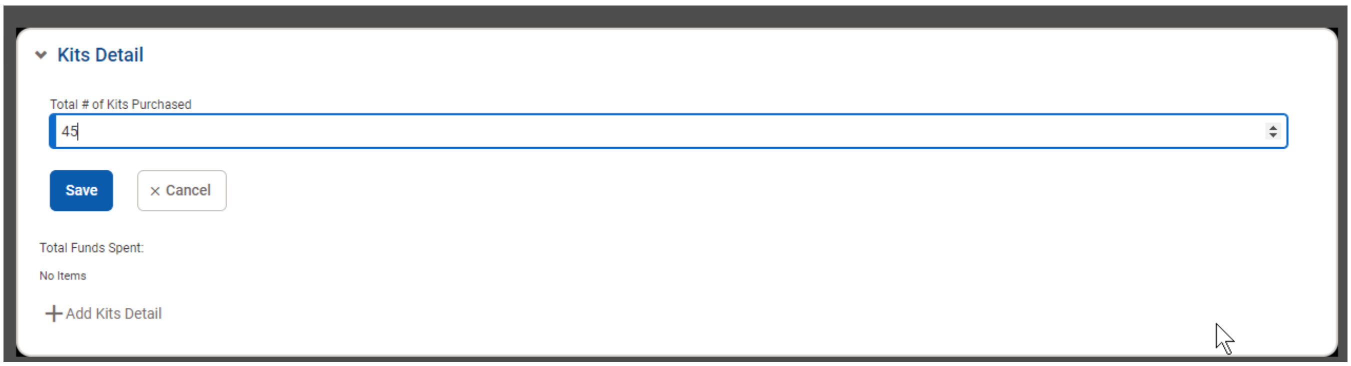


As you add various Kit Types, Number of Kits and Cost of Kits, WITS will automatically add those values and display in the Total fields at the top of the Kits detail screen.

If you do not know the detail of kits that were purchased, you may directly enter the Total # of Kits Purchased, by clicking on the pencil icon:



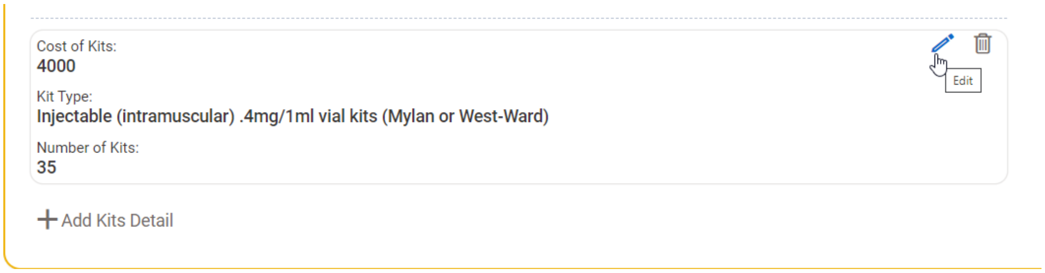
Enter the number of kits, and click **Save.**



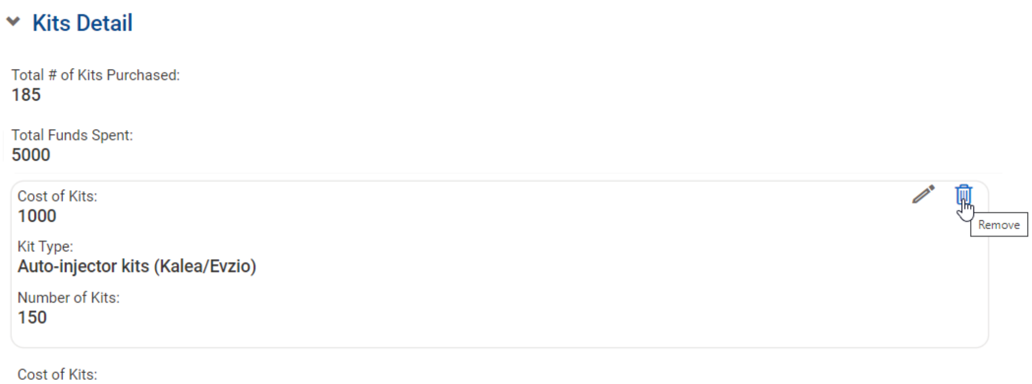
Please note that if you later decide to enter the detail for each kit purchased, then the Total # of Kits Purchased will automatically be replaced by the sum of all of the kits entered below.

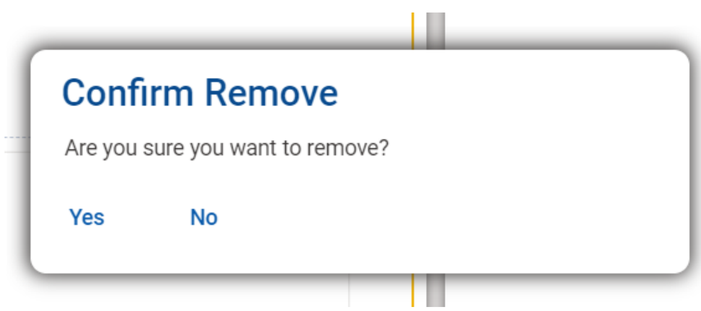
Additional Steps/Related Information

To update kit information, click the **Edit** icon.



To delete a kit type, click the **Remove** icon and then select either **Yes** or **No**.

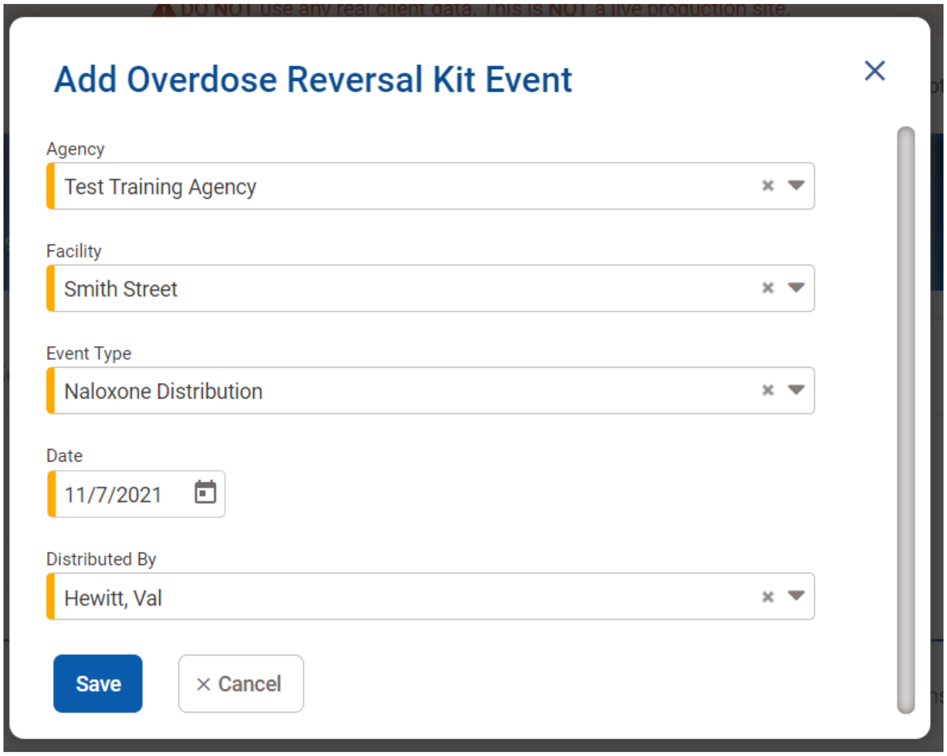




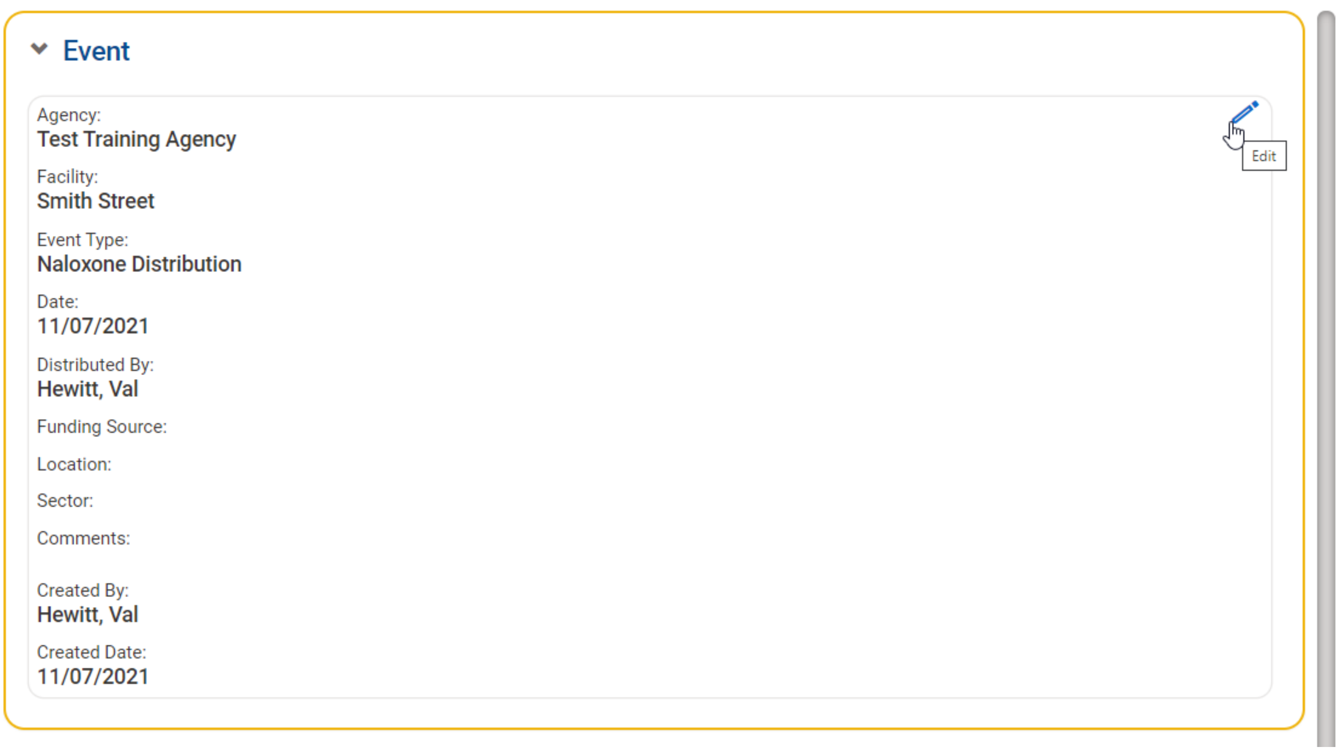
Naloxone Distribution

To create an Overdose Reversal Kit Distribution Event

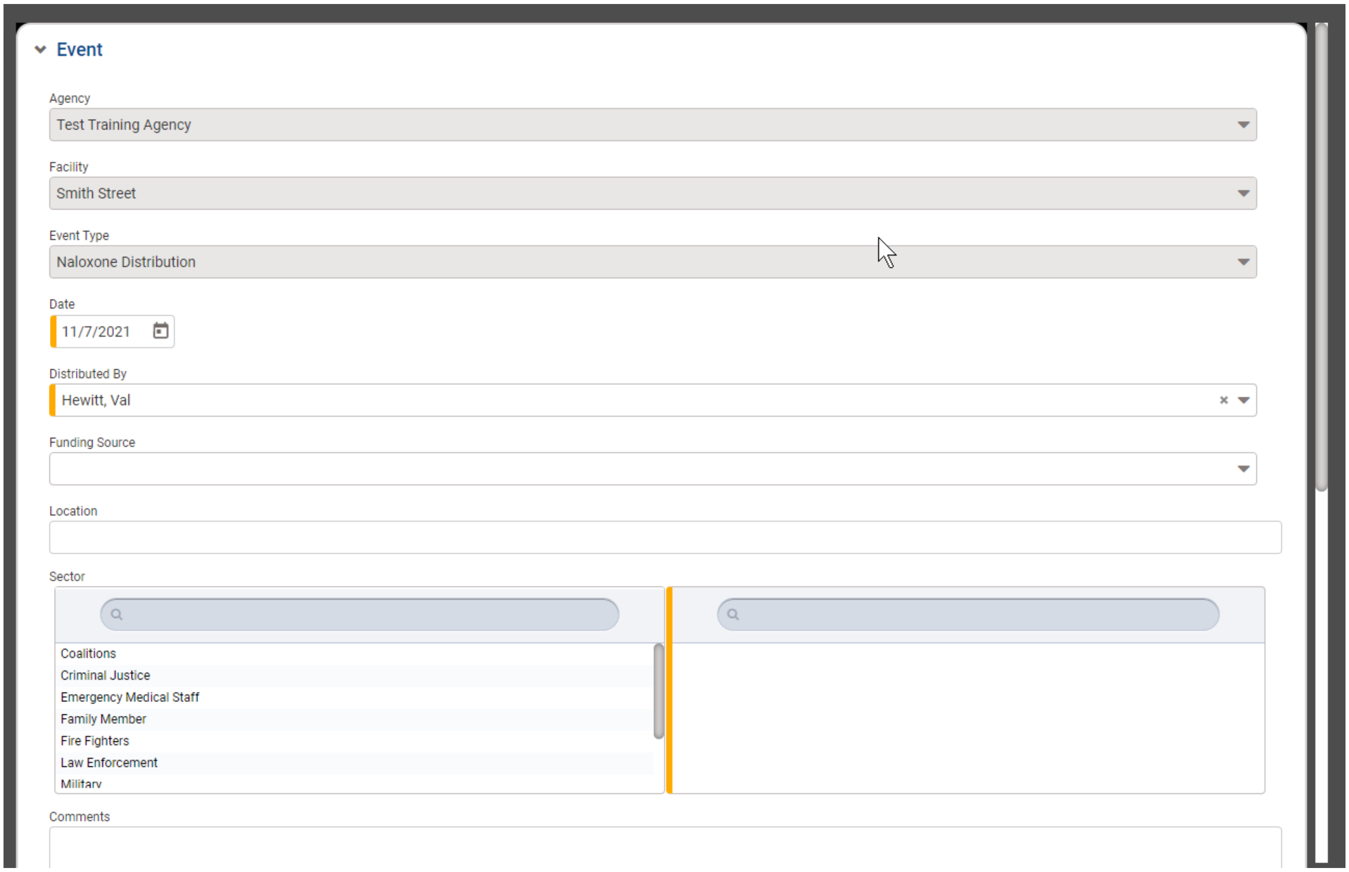
1. Click **Create New Overdose Reversal Kit Event**.
2. On the **Add Overdose Reversal Kit Event** dialog box, in the **Event Type** field, select **Naloxone Distribution** from the drop-down list.
3. Click **Save**.



4. On the **Distribution Event Workspace** screen, in the **Event** panel, click the **pencil icon** to edit the event information.



5. Enter the information.



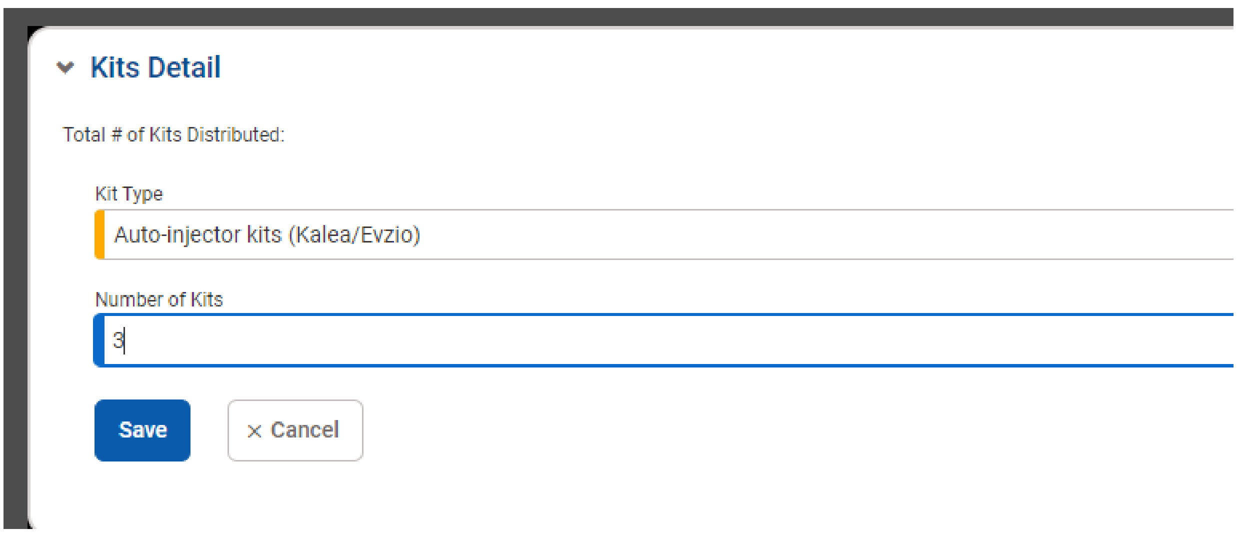
Field	Description
Agency	Read-only field.
Facility	Read-only field.
Event Type	Read-only field.
Date	Update the date as applicable.
Purchased By	Update the name as applicable.
Funding Source	(Optional) Defaults to the SOR funding source name.
Location	(Optional) Enter the location for this distribution event.
Sector	Update the selected sector(s) as applicable for this distribution event.
Comments	(Optional) Type comments about this event as applicable.
Created By	Read-only field.
Created Date	Read-only field.

6. Click **Save**.

Panel: Kits Detail

1. To add the kit detail information, Click **+Add Kits** detail in the Distribution Event Workspace.

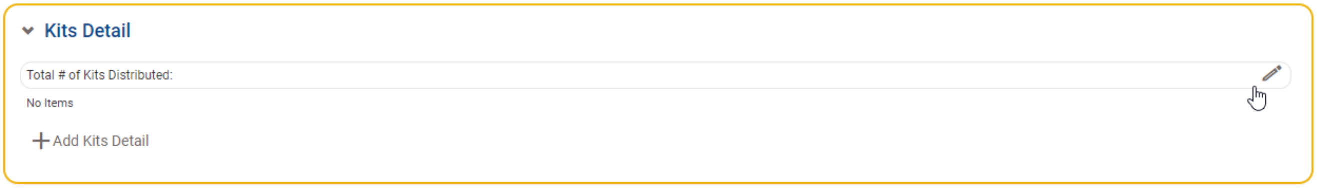
2. Enter in the type of Kits and the number of Kits.



7. In the **Kits Detail** panel, update the fields as shown in the table below.

Field	Description
Kit Type	Select the type of kit from the drop-down list.
Number of Kits	Type an integer.
Cost of Kits	Type an integer (whole numbers).

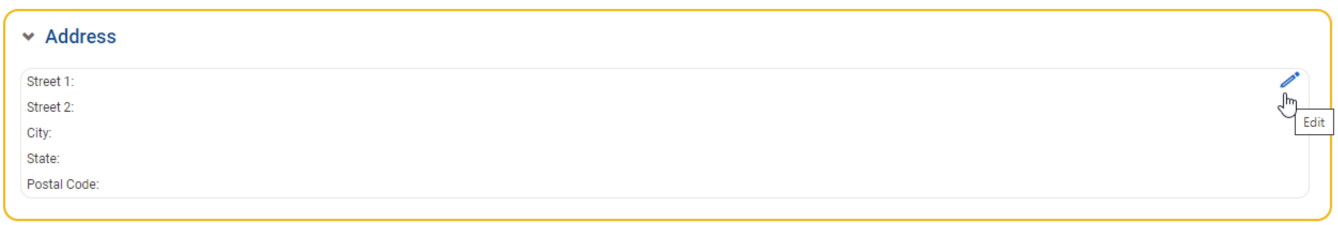
If you do not know the detail of kits that were distributed, you may directly enter the Total # of Kits Distributed, by clicking on the pencil icon in the Kits Detail panel:



Please note that if you later decide to enter the detail for each kit distributed, then the Total # of Kits Distributed will automatically be replaced by the sum of all of the kits entered below in the Kits Detail panel.

Panel: Address

On the Address panel, enter any address information known about the event, by clicking on the Edit pencil icon:

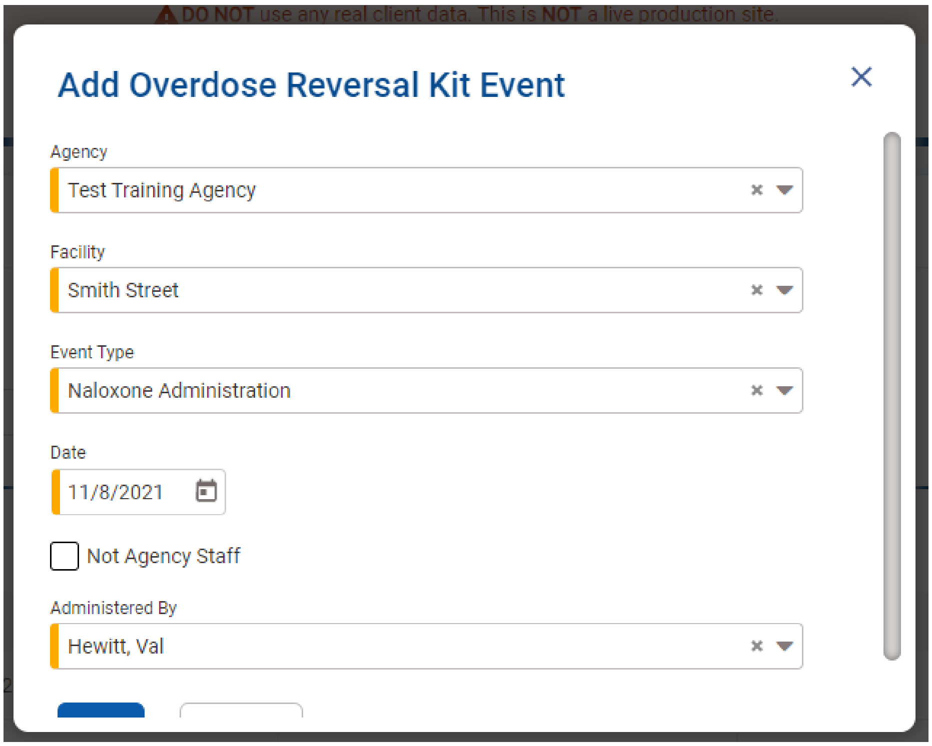


Street, City, State and Postal code are required to save an address for the event:

Naloxone Administration

To create an Overdose Reversal Kit Administration Event

1. Click **Create New Overdose Reversal Kit Event**.
2. On the **Add Overdose Reversal Kit Event** dialog box, in the **Event Type** field, select **Naloxone Administration** from the drop-down list.
3. Click **Save**.

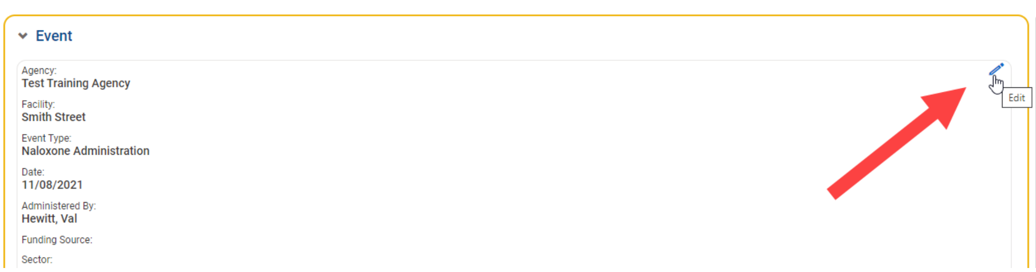


The Administration Event Workspace screen includes four (4) panels:

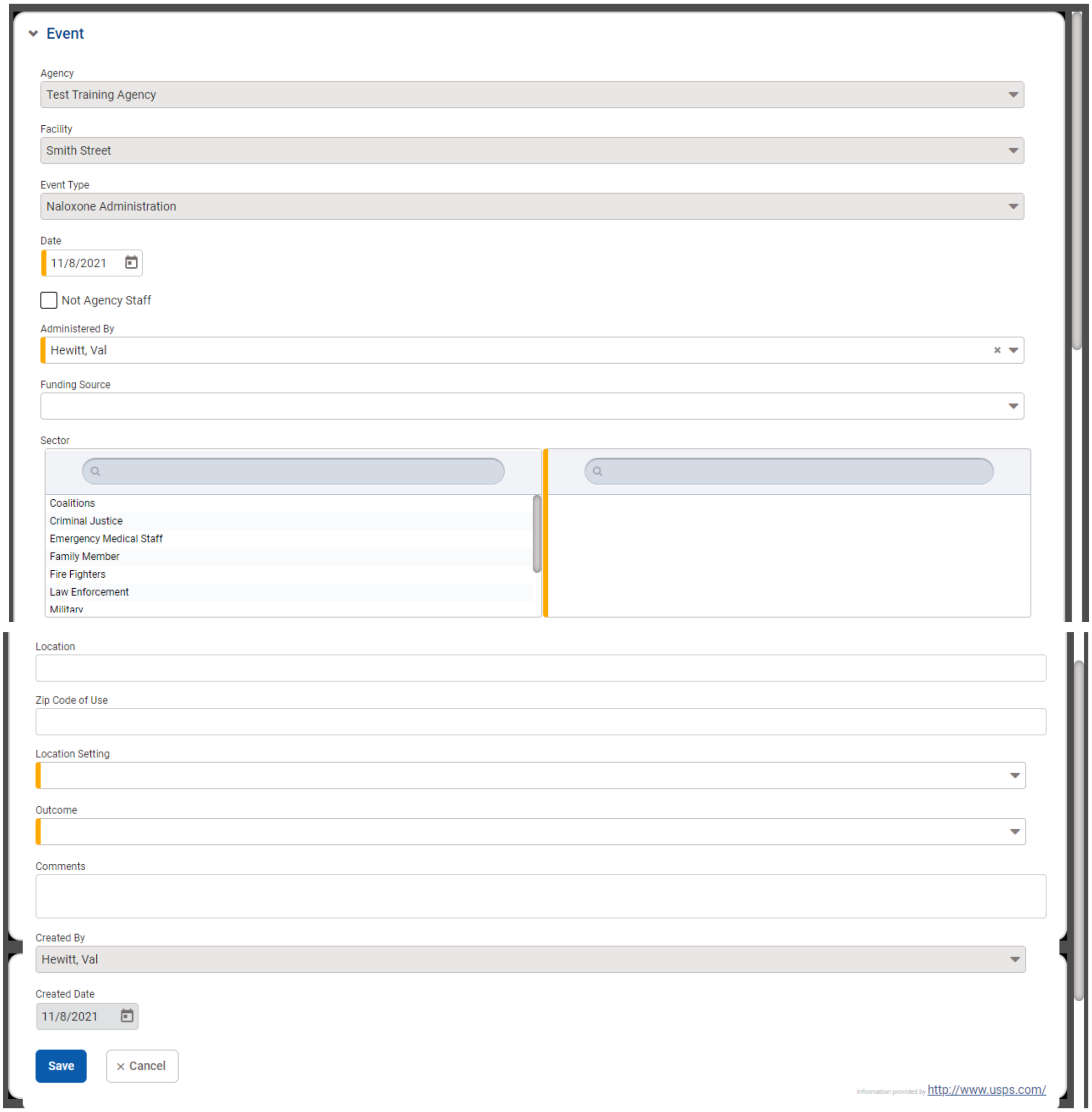
- Event
- Kits Detail
- Address
- About the person who overdosed

Panel: Event

1. To enter the event details, click the pencil icon in the upper corner of the event section.

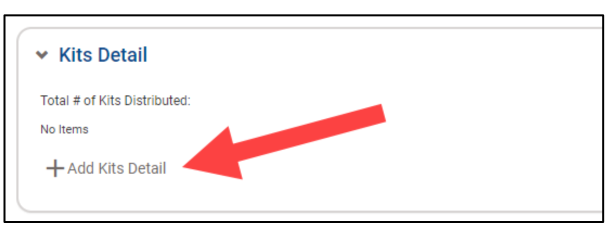


2. Enter the event details and click **Save.**



Panel: Kits Detail

1. To enter information about the kit or kits administered as part of this event, click **Add Kits Detail**.

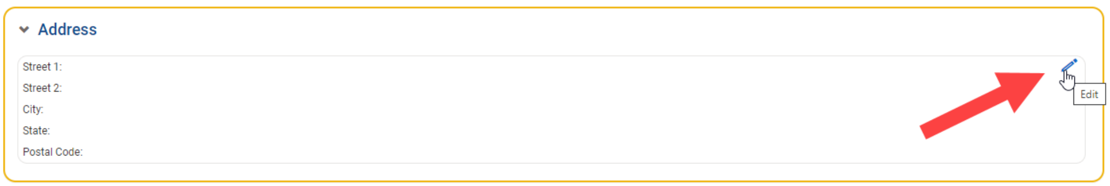


2. On the Kits Detail panel, select the **Kit Type** and then enter the total number of Kits Administered.

3. Click **Save**.

Panel: Address

On the Address panel, enter any address information known about the event, by clicking on the Edit pencil icon:

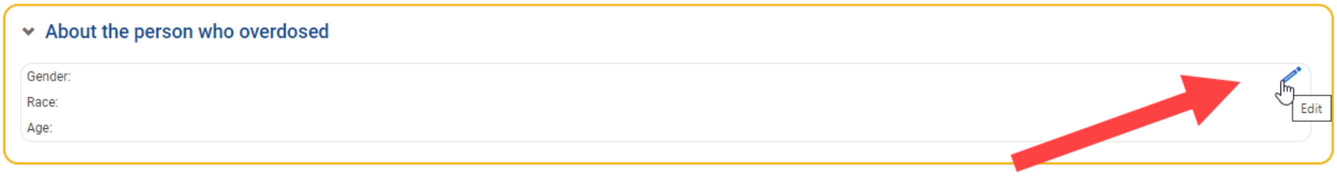


Street, City, State and Postal code are required to save an address for the event:

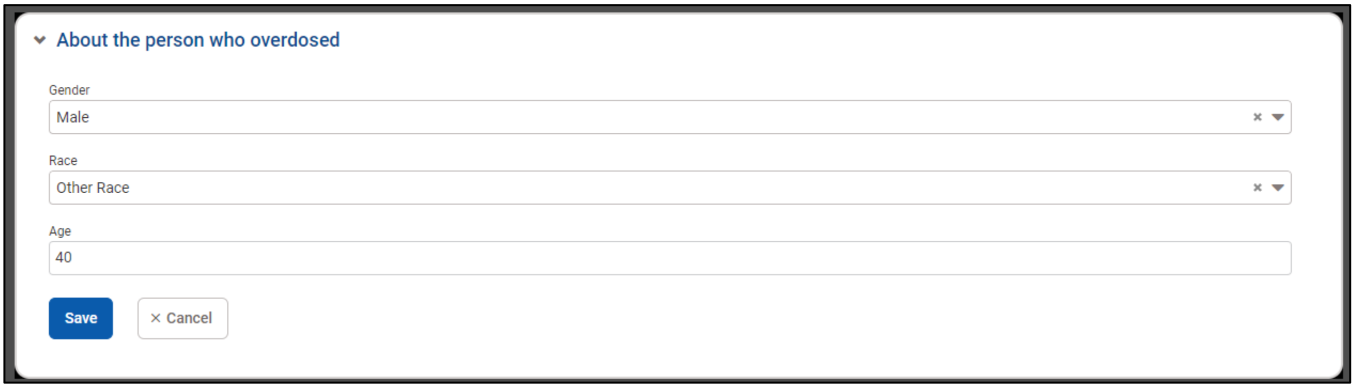
Panel: About the person who overdosed

On this panel, enter the Gender, Race, and/or Age of the person who overdosed, if known.

1. Click the pencil icon to open the panel.



2. Enter the information on the person who overdosed.



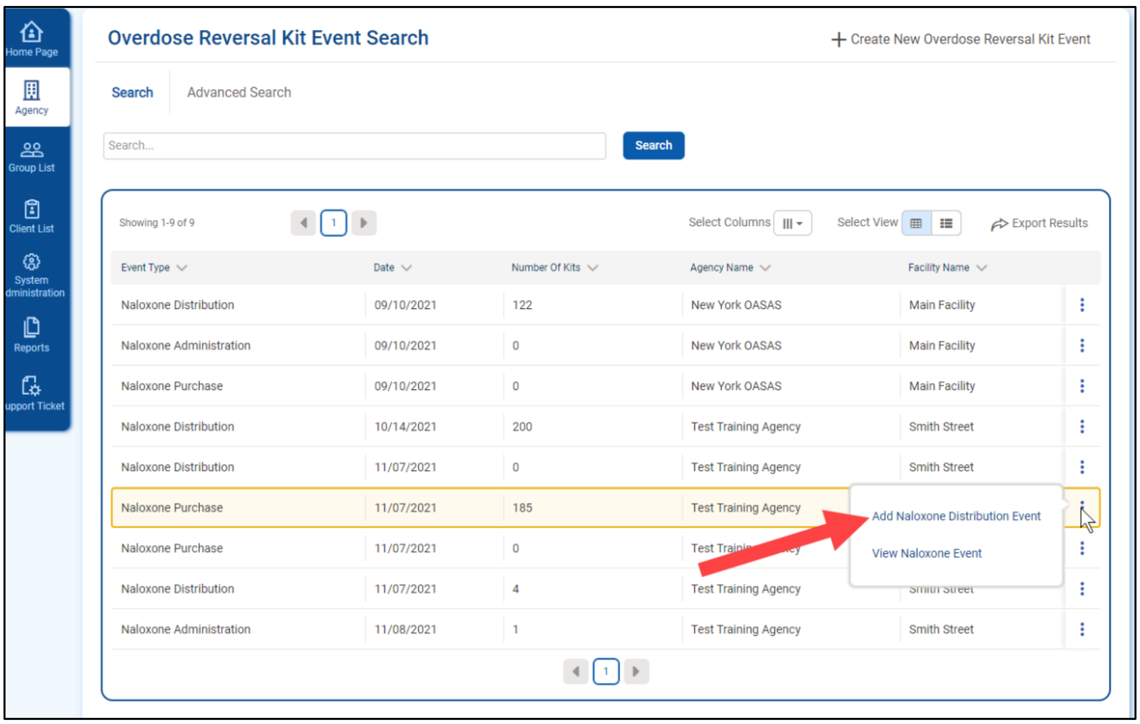
3. Click **Save.**

Linked events

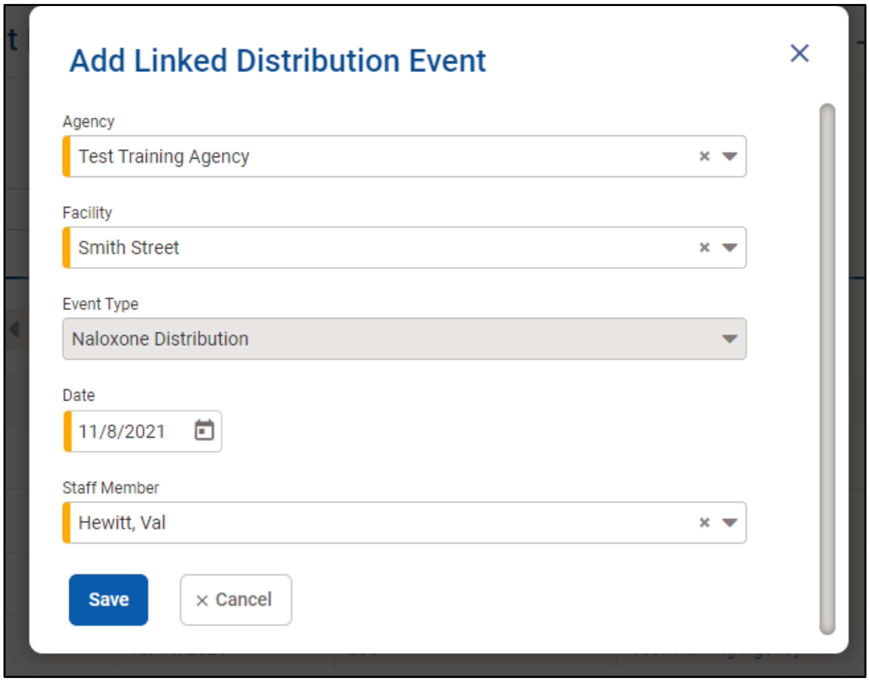
If the same agency has purchased kits and distributed those kits, it is possible to link those records. It is also possible to link an administration event to a distribution event.

To associate a Distribution Event with a Purchase Event, follow the steps below.

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. On the **Overdose Reversal Kit Event Search** screen, locate the desired Naloxone Purchase event.
3. Point the ellipsis icon and then click **Add Naloxone Distribution Event**.



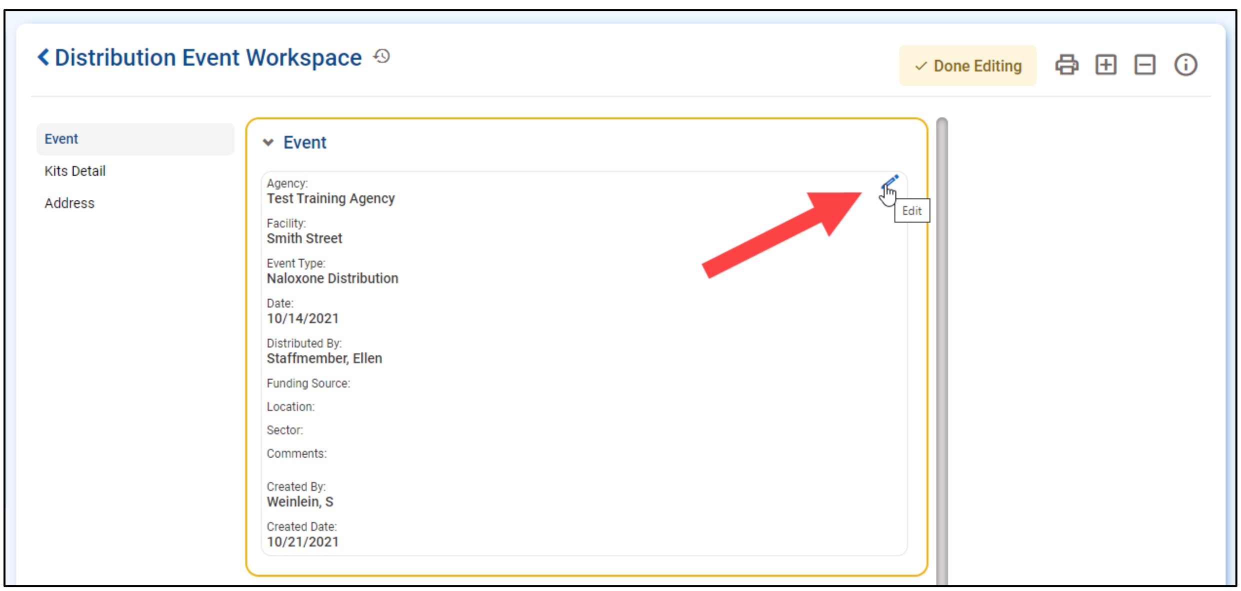
4. On the **Add Linked Distribution Event** dialog box, review and update the fields as applicable, and then click **Save**. This will open the Distribution Event Workspace screen.



Panel: Event

For linked events, information included in the Distribution Event panel will be pre-populated using options selected on the linked Purchase Event.

To update event information, in the Event panel, click the **Edit** icon.

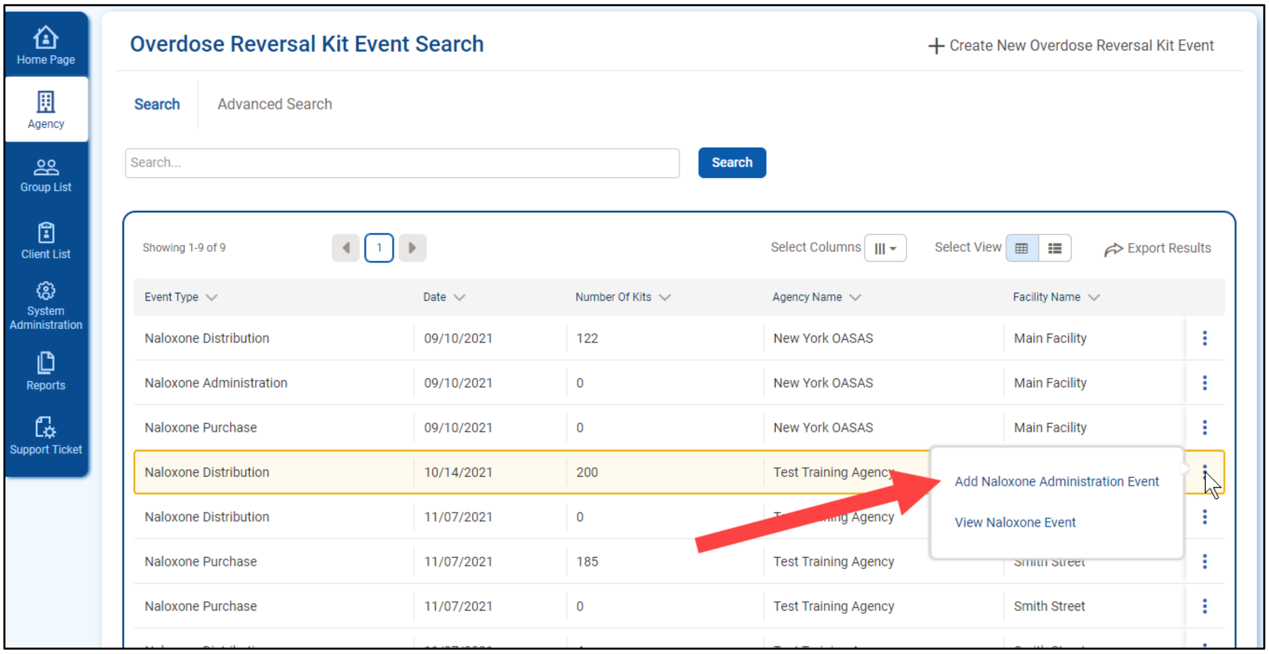


To associate an Administration Event with a Distribution Event, follow the steps below.

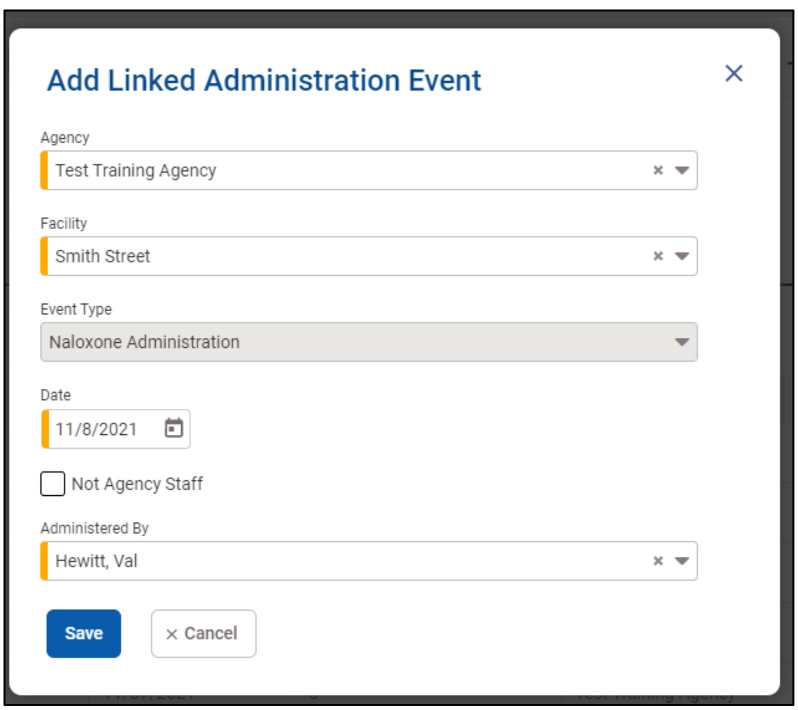
1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.

2. On the **Overdose Reversal Kit Event Search** screen, locate the desired Naloxone Distribution event.

Point the pencil icon, and then click **Add Naloxone Administration Event**.

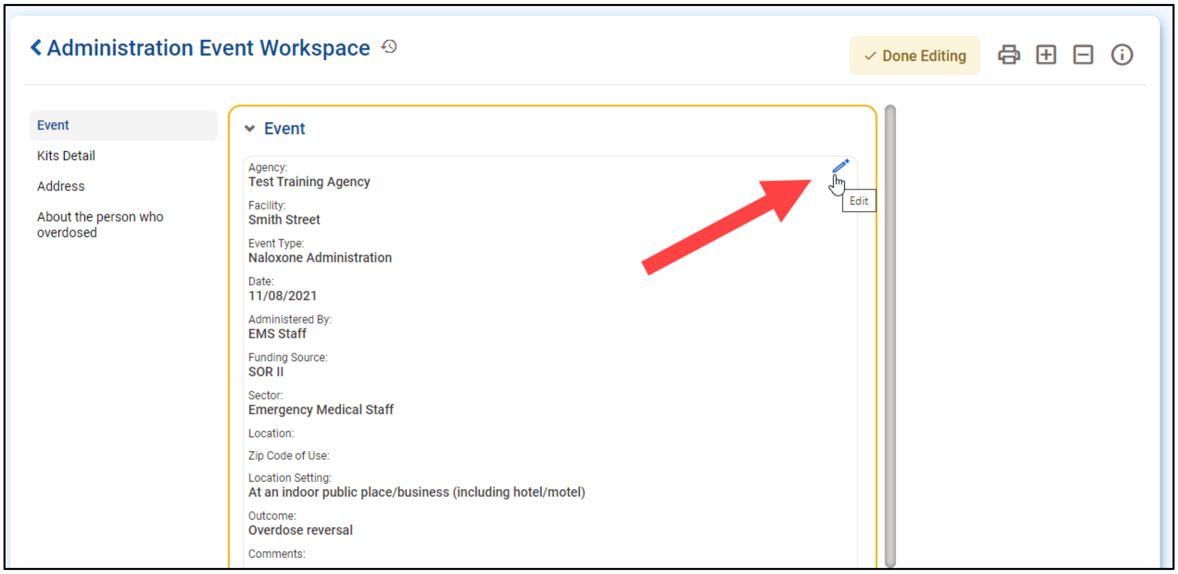


3. On the **Add Linked Administration Event** dialog box, review and update the fields as applicable, and then click **Save**. This will open the Administration Event Workspace screen.



For linked events, information included in the Administration Event panel will be pre-populated using options selected on the linked Distribution Event.

To update event information, in the Event panel, click the **Edit** icon.

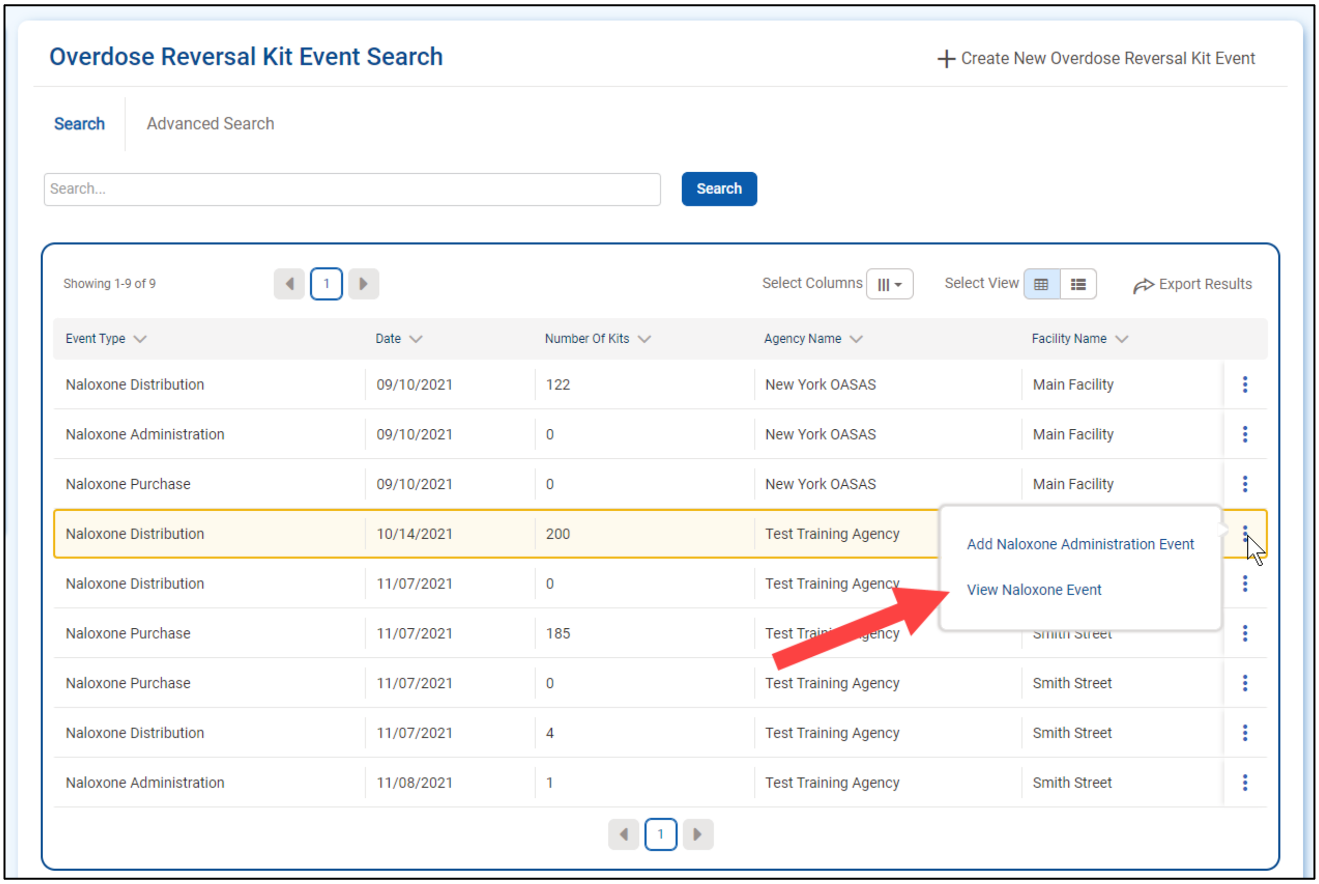


Note: Linked events allow to prepopulate fields from one event to the next, and it opens the possibility for reporting across events. However, at this point there are no rules preventing the user from distributing more kits than were purchased, or administering more than was distributed.

Reviewing an Overdose Reversal Kit Event

If you need to review and/or edit an event that was previously entered, follow these steps:

1. On the left menu, click **Agency**, and then click **Overdose Reversal Kits**.
2. On the **Overdose Reversal Kit Event Search** screen, locate the desired event to review.
3. Point the pencil icon, and then click **View Naloxone Event**.



4. On the Event Workspace, click on the **Edit** button at the top in order to make the workspace editable.

Figure 7-1: Edit

5. You will then be able to click on the pencil icons for each panel you wish to edit: