



Office of Alcoholism and Substance Abuse Services

WITNYS Prevention

Basics User Guide

V1.0

Contents

Introduction	1
Section 1. WITS Basics	2
User Interface	2
Section 2. Screen Formats	5
Search.....	5
Lists	5
Profile.....	6
Section 3. Data Entry Tips.....	7
Textbox.....	7
Dropdown Menu.....	8
Mover Box.....	8
Mover Box with a Condition	8
Section 4. Logging Into WITS	9
Security and Logging Out	10
Section 5. Changing Facilities.....	11
Section 6. Hints.....	12
Snapshot feature.....	12
Section 7. Print Function	12
Section 8. Internet Browser Pop-Up Blocker	14

Introduction

This user guide has been prepared for all WITS users. Topics covered include basic navigation features, system conventions, screen formations, hints, and login information.

Note: System Requirements

WITS is compatible with up-to-date versions of most modern browsers such as, Internet Explorer version 10+, Firefox, Google Chrome, and Safari.

Google Chrome requires Silverlight plug-in for WITS Scheduler.

IMPORTANT

The Internet Browser “Back” feature does not work within WITS. Use the WITS Menu, the Cancel or Finish buttons to navigate through WITS.

Section 1. WITS Basics

User Interface

WITS is a sophisticated system designed to accommodate many types of users and staff. It can be customized by any system administrator to create staff accounts with user-specific access and permissions. This translates into a personalized WITS interface whereby the end-user will only have access to the modules, screens, and functions that have been assigned to them.

As a result of the personalized user interface, end-users will not be distracted by additional screens, modules, or functionality which often can reduce productivity and make an interface less user-friendly. To get the maximum use out of the WITS system, the user should be aware of the following interface features and navigation, including:

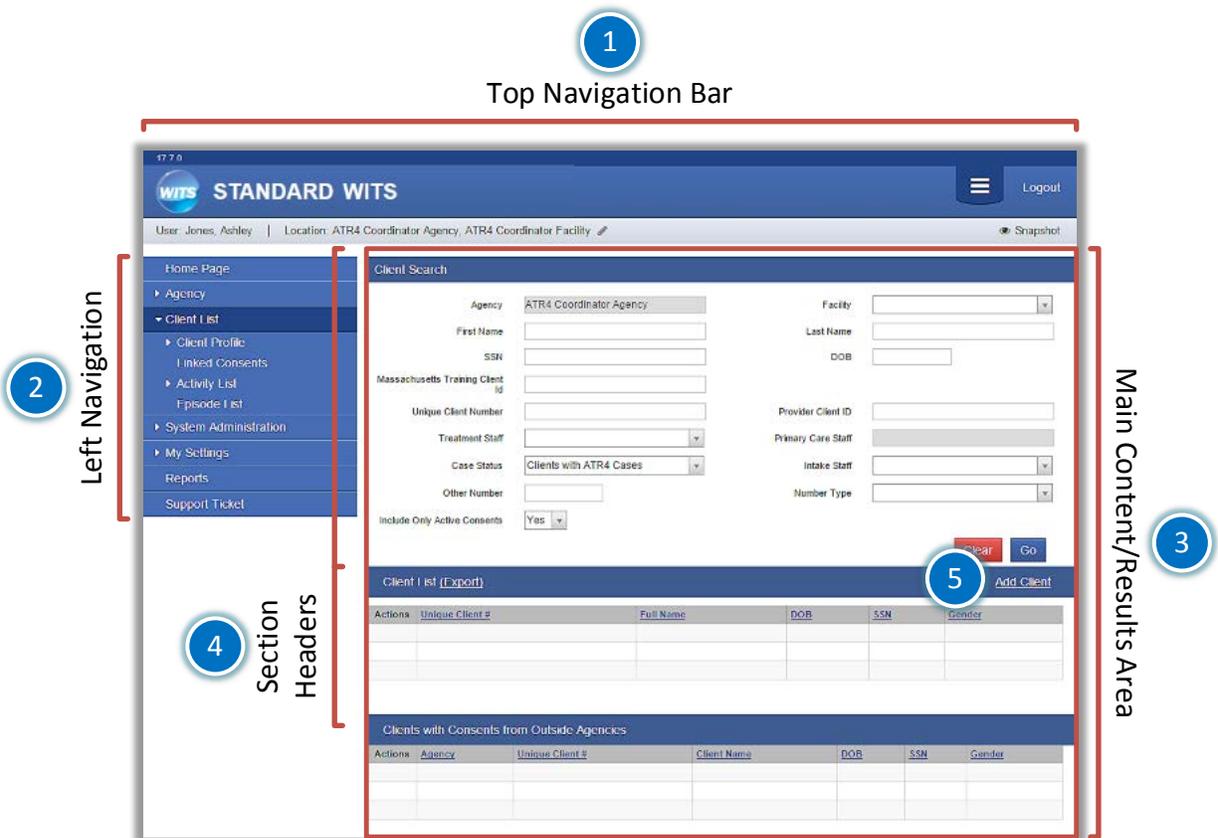


Figure 1. WITS Navigation Diagram

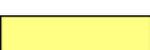
1. **Top Navigation Bar:** This area contains information that helps the user know his/her current context in the system, which includes:
 - a. **User:** the Person currently logged into the system
 - b. **Location:** the Agency and Facility currently selected
2. **Left Navigation:** WITS has been designed to follow common behavioral health service workflows. As a result, when using the left navigation (menu), you will immediately note that

most of the modules and screens have been logically organized in a manner which makes sense to many Clinical staff, Case managers, and Administrators.

3. **Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. Typically you will first see either of these sections:
 - a. **Search:** for finding information already entered, or
 - b. **Profile:** for entering new data

4. **Section Headers:** WITS often contains screens which are comprised of several sections. Typical headers indicate **Search**, **List** and **Profile** (or entry) sections of screens. These section headers are always dark blue and may contain actions such as **“Add”** or **“Export”**.

5. **Function Links:** If the screen allows you to perform certain functions, such as **“Add”** or **“Export”**, the functions appear as underlined links. A **“hand”** will also appear when your cursor floats over the action item, reminding you that you can **“click”**.

Action Buttons		Data Fields	
	Cancels the current action and returns to the previous screen		Mandatory field: MUST have data in order to save record
	Saves data entered and remains on the current screen		Read only: system generated field, for display only and cannot be edited
	Saves data entered and returns to the section start page		Discretionary field: will not affect completion or saving of record
	Navigate through the screens in each section (left and right arrow buttons)		Missing Required field: enter data before Save or Finish
	Clears all criteria from the search tools when present		Required for State Reporting: record may be saved but will not be complete
	Run the search tool using the criteria entered		
	Move data from one choice box to another (mover buttons)		
Action Links			
		Clicking on a column heading will reorganize the table alphanumerically from 1-Z and then Z-1	
		Administrative Actions	
		On list screens, hover over the Actions pencil icon to quickly select from associated screens	
System Notifications			
		Error: WITS will not allow you to move forward until you have addressed the error stated	
		Informational Message: Informs users that something has occurred	
		Warning: Data has been entered which falls outside of a certain parameter. The record can be updated, but you have been warned	

Section 2. Screen Formats

WITS has three basic types of screens: **Search**, **List**, and **Profile**.

Search

Search screens allow you to search for items that have already been entered into the system. The more information entered in the search fields, the more restrictive the search. Search screens are identified with the “**Go**” and “**Clear**” buttons. **Go** initiates the search, and **Clear** will clear all search criteria.

The screenshot shows a 'Client Search' form with the following fields and values:

- Agency: Capitol Region Mental Health Center
- Facility: CRMHC
- First Name: (empty)
- Last Name: (empty)
- SSN: (empty)
- DOB: (empty)
- Connecticut-WITS Training Client Id: (empty)
- MPI: (empty)
- Unique Client Number: (empty)
- Provider Client ID: (empty)
- Treatment Staff: (empty)
- Primary Care Staff: (empty)
- Case Status: All Clients
- Intake Staff: (empty)
- Other Number: (empty)
- Number Type: (empty)
- Include Only Active Consents: Yes

Buttons: Clear (red), Go (blue)

Figure 2. Search Screen Format

Lists

A search will result in a populated list, with columns showing various data elements. All lists are sortable by clicking on the column header.

- Many lists have an “**Actions**” column offering functions that can be applied to a selection from the list.
- Also, many lists have an “**Export**” feature, allowing you to export data on the list into an excel spreadsheet. Exports are great alternatives to reports.

Actions	Unique Client #	MPI	Full Name	DOB	SSN	Gender
	M249988BA676120	300262	Abromovich, Jan	2/24/1970	887-77-7889	Female
	F119088CA998100	300419	activity date, test	1/1/1980	555-47-9898	Female
	F169742LA358120	300076	Alday, Sharon	1/26/1987	123-45-5432	Female

Figure 3. List Screen Format

Profile

Profiles display the main content area for data entry. Profile screens are identified with the “**Save**”, “**Cancel**”, or “**Finish**” buttons. **Cancel** returns to the prior screen or list without saving. **Save** will check any business rules associated with the screen before saving the data, and will keep the user on the current screen. **Finish** will save the data and return the user to the previous list screen.

Profile

Prefix Unique Client Number

First Name MPI 300625

Middle Name Record Created By

Last Name Last Updated By

Suffix Created Date

Gender Last Updated Date

DOB Date of Death

SSN

Access Category

Has paper file

Administrative Actions

[Download c32](#) [View c32](#)

Figure 4. Profile Screen, format 1

Additional Information

Ethnicity

Races

- Asian
- Native Hawaiian or Other Pacific Islander
- White
- American Indian
- Unknown

Selected Races

- Black or African American

Special Needs

- Wheelchair Accessible
- Interpreter
- None
- No Response

Selected Special Needs

Advanced Directives

- Allow Natural Death
- Do Not Intubate
- Do Not Resuscitate
- Living Will

Selected Advanced Directives

Effective Date

Figure 5. Profile Screen, format 2

Section 3. Data Entry Tips

WITS uses colors on certain fields to indicate whether they are required, or read only:



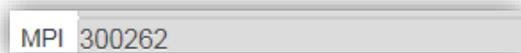
A dark yellow field is required and must be filled in before saving. An error message will appear if field is empty.



A light yellow field is required by business rules. The record can be saved without entering it, but may need to be filled in later.



A white field is not required, and entry is optional.



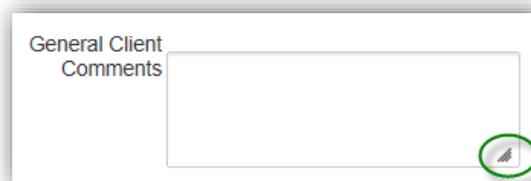
A gray field is filled by the system and is read only; it cannot be edited. It might display information entered in another screen.

WITS also has a variety of different entry field types:

Textbox

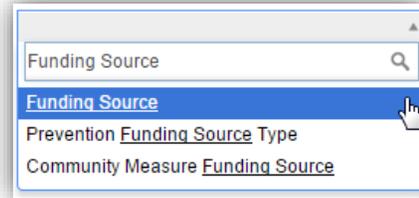
Textboxes allow the user to enter data manually. Some text boxes have specific formats that need to be entered, such as:

- Date fields, which requires M/D/YY or M-D-YY format (Years can be entered as a 2 or 4 digit year, but will be converted to a 4 digit year when saved).
- SSN and Phone Number fields, which require numbers, although dashes are optional and are added automatically when saved.
- Larger text boxes will expand if you pull the lower right corner with your mouse:



Dropdown Menu

A Dropdown Menu is used when only one entry may be selected from a list of values. Typically these values are controlled by your administrator.



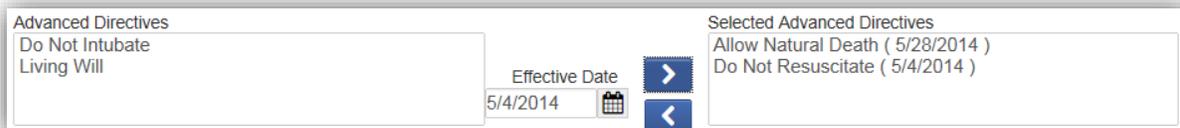
Mover Box

A mover box is used when more than one entry may be selected from a list of values. To choose multiple values from the list, hold down the control key as you click the values from the left side, and then click the > button to move the values to the right. To remove values from the selected list, click on the value(s) on the right that you want to remove and click the < button to move them left.



Mover Box with a Condition

In some cases, you may be asked to provide a condition (such as a date) to go along with the value you choose. Make sure to enter the appropriate date for each selected value.



Section 4. Logging Into WITS



Where: Internet Browser > WITS Login Screen

If this is your first time logging in, be sure to have your **Temporary Password** and **PIN** sent to your email by your system administrator [See Figure 2]. For returning users, complete steps 1-3 and skip 2a and 2b.

1. To login, open your browser then enter the **URL** of your **WITS** system.
2. Type in your **User ID** and **Password**, then click **Go**.
 - a. *First time logging in:* enter your **Temporary Password** and **PIN** with your **new Password** and **PIN**. Click **Save**.
 - b. *First time logging in:* Choose a Security Question from the dropdown box, type your answer, then click **Save**.
3. Enter your **PIN**, then click **Go**.

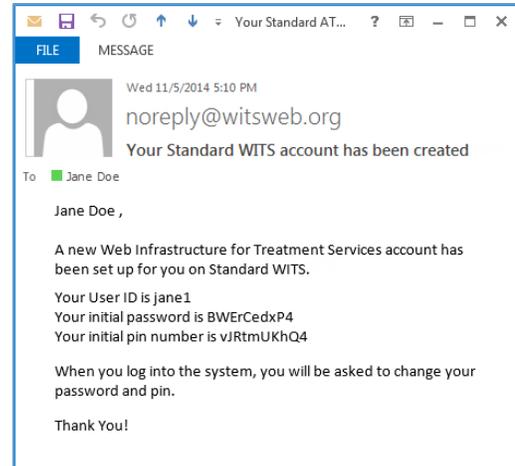
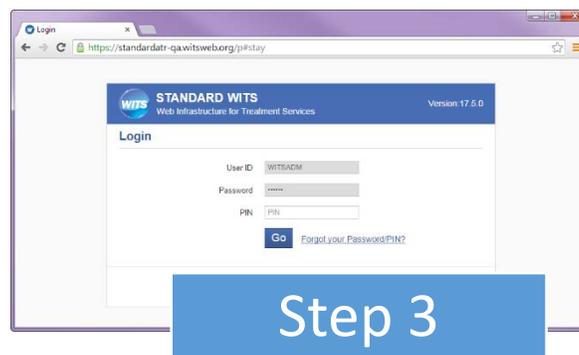
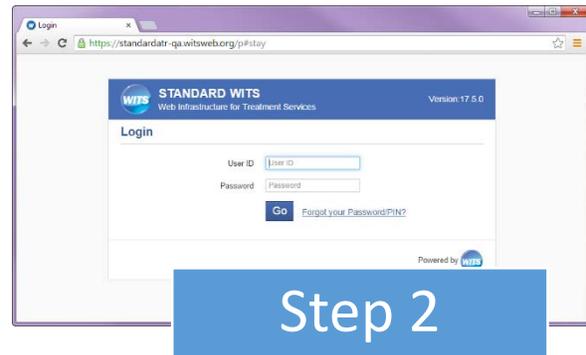
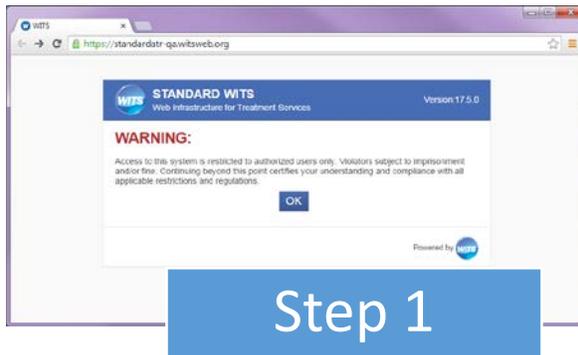


Figure 6. Temporary Password and PIN Email

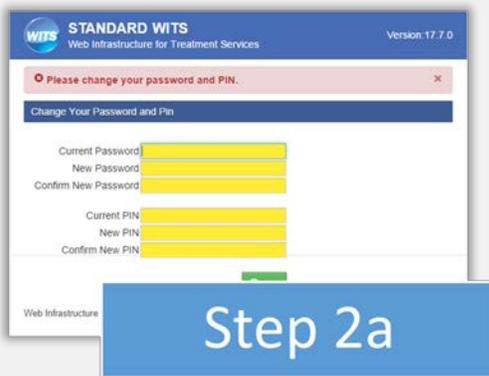


Note: First Time Logging In

If this is your first time logging in or if your credentials (i.e. password and pin) are expired, the system will show another screen to allow you to enter a new Password and Pin. Be sure to pick a Password and Pin that you can memorize and which is secure.

Password and PIN must be at least 6 characters long and include at least 1 number.

As part of the system's security features, you may be asked to reset your Password and PIN every few months. Also, if you enter in a wrong Password and/or PIN multiple times, your account may be disabled. Contact your system administrator if this occurs.



The screenshot shows the 'STANDARD WITS' interface with a red error message: 'Please change your password and PIN.' Below this is a form titled 'Change Your Password and Pin' with fields for 'Current Password', 'New Password', 'Confirm New Password', 'Current PIN', 'New PIN', and 'Confirm New PIN'. A blue box labeled 'Step 2a' is overlaid at the bottom.



The screenshot shows the 'STANDARD WITS' interface with success messages: 'Password Successfully Changed.' and 'PIN Successfully Changed.' Below these is a form titled 'Change Your Security Question' with a dropdown menu for 'Choose a Security Question', a 'Security Question Answer' field, and a 'Save' button. A blue box labeled 'Step 2b' is overlaid at the bottom.

Security and Logging Out

To logout of WITS, click **Logout** located in the upper right corner.



Figure 7. Logout of WITS

To ensure security, WITS will automatically lock an account if left open on one computer and then a different computer is used to log in. To prevent this issue, always remember to log out at the end of the day and anytime the computer is unattended.

Password and pins are not stored in the database and there is no way to retrieve them. If either of these codes is forgotten, your credentials will need to be re-set which will generate a new, "No-reply" email with temporary password and pin and you will have to re-do your password and pin. The training password and pin never have to change, but the production site passwords and pins are changed every 60 days.

Section 5. Changing Facilities



Where: [My Settings](#) > [Change Facility](#)

The **Change Facility** screen is used to change the agency/facility you are currently logged into, or for an administrator or staff member who has been assigned to multiple agencies/facilities.

There are two ways to access the Change Facility screen:

- From the left menu, click **My Settings**, then select **Change Facility**,
- Or, from the top navigation, click on your current **Location** to open the Change Facility screen

Once on the Change Facility screen, click on the **New Agency** and/or **New Facility** dropdown menus and select from your assigned agencies and/or facilities, then click **Go**.

Tip: Check the top of your screen to make sure that “**Location:**” is displaying the desired location you have selected.

17.7.0
STANDARD WITS
User: Jones, Ashley | Location: Administrative Agency, Administrative Unit
Snapshot

Home Page
▶ Agency
▶ Client List
▶ System Administration
▼ My Settings
Change Facility
Change Password/PIN
Change Security Question

Change Facility

Current Agency: Administrative Agency
Current Facility: Administrative Unit
New Agency: Administrative Agency
New Facility: Administrative Unit

Cancel Go

Figure 8. Change Facility screen

17.7.0
STANDARD WITS
User: Jones, Ashley | Location: Administrative Agency, Administrative Unit
Snapshot

Home Page
▶ Agency
▶ Client List
▶ System Administration
▶ My Settings

Home

Announcements

Actions	Summary	Posted Date	Start Date	Priority

Figure 9. Access Change Facility screen from the Top Navigation

Section 6. Hints

Snapshot feature

The new **Snapshot** feature opens up a separate window containing a read-only copy of your screen. This useful tool allows you to access other screens in WITS while still viewing the information within the Snapshot. Multiple Snapshot windows can be open simultaneously.

NOTE: You must disable the pop-up blocker in your web browser to view the Snapshot feature

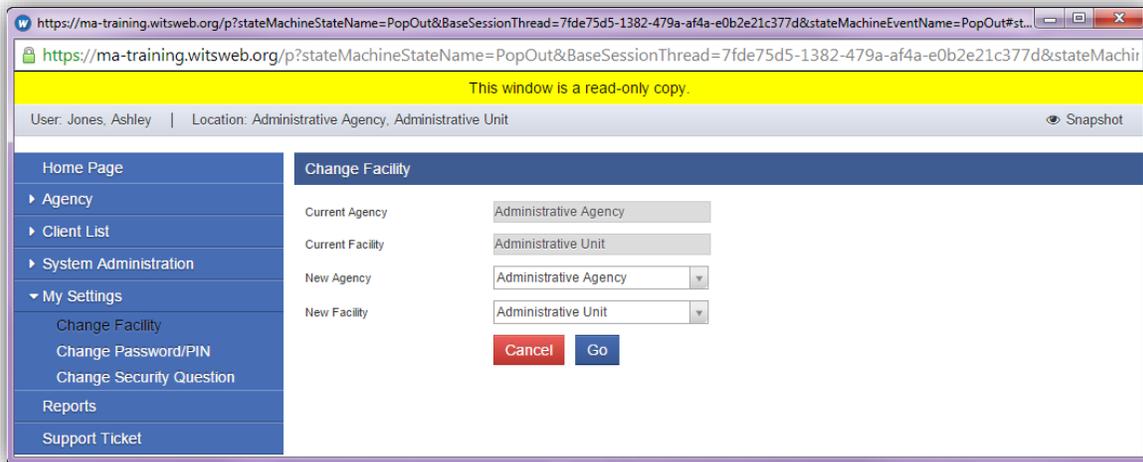


Figure 10. Snapshot

Section 7. Print Function

Use your browser's print function to print your screen. Using your mouse, **right click** on your screen to open a list of options, then click **Print**.

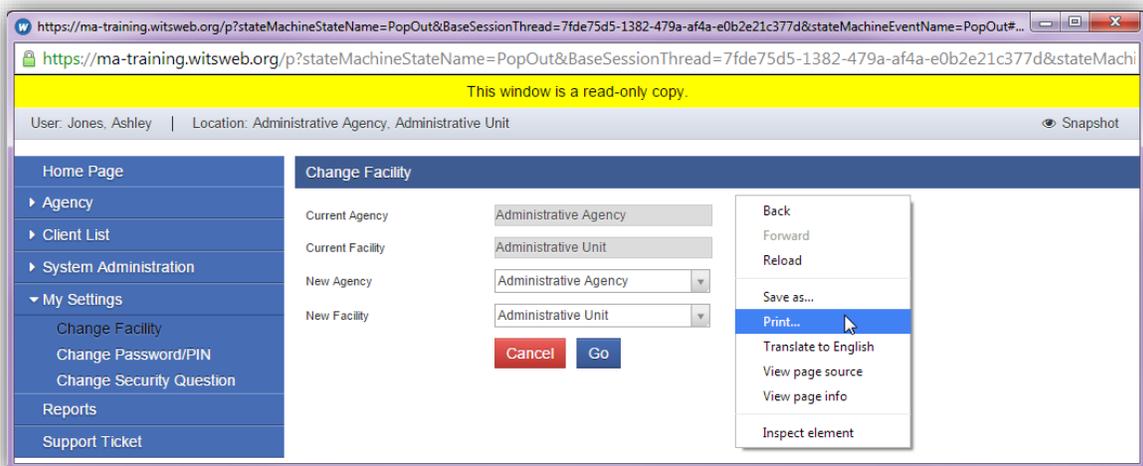


Figure 11. Right Click to Open Browser's Print Function

In the print preview, notice the system saves ink by only printing the main section of the screen.

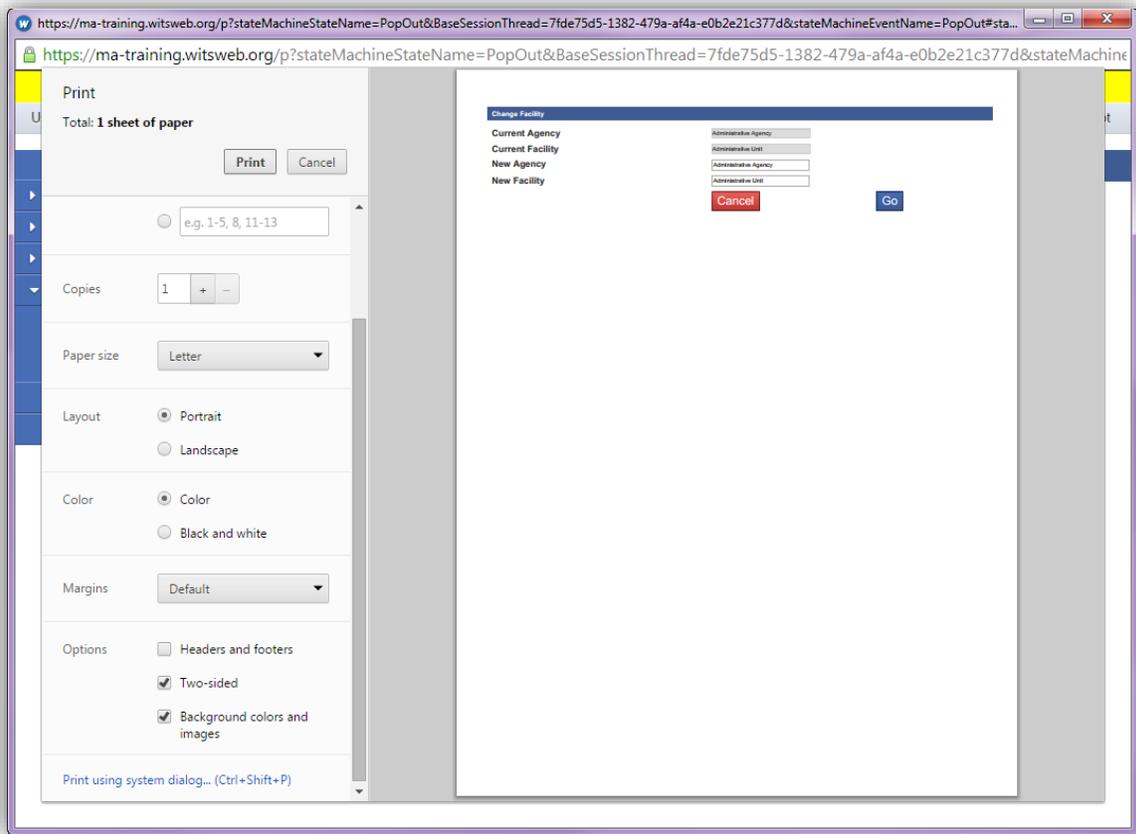


Figure 12. Print Preview

Section 8. Internet Browser Pop-Up Blocker

In order to use features like the Snapshot in WITS, in certain browsers (i.e., Internet Explorer) you must first allow pop-ups for WITS in your web browser. To do this, complete the following steps:

1. Click **Tools** on the top navigation menu of your browser. If you do not see the top navigation menu, press “ALT” on your keyboard and the menu should appear.
2. From the Tools menu, click **Pop-up Blocker**
3. Select “**Always allow pop-ups from this site...**”

