

SanWITS Access to Service - All SUD Providers

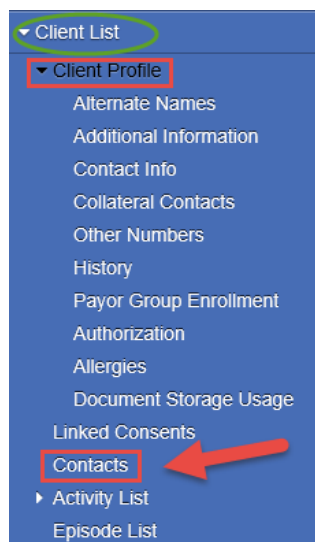
“Access to Service Data Collection”

Effective 7/1/2019, the County of San Diego will collect the 2nd and 3rd Next Available Appointment for Intake/Screening Appointment and Treatment Appointment.

Important Note: Rules are built into the system that will prevent the 2nd Available date from being the *same* as or before the 1st Available date. The system will also prevent the 3rd Available date from being the same as or before the 2nd Available date. For this reason, *if a client is admitted on 6/29/19 or 6/30/19, you will need to start collecting the 2nd and 3rd available appointment dates to be entered into the system on July 1st, 2019 when the fields become available.*

For existing clients, WITS will automatically enter dates for both new fields in the Contact screen and the Intake screen. These dates will be 6/29/19 for the 2nd Available Appointment and 6/30/19 for the 3rd Available Appointment and will not be used for reporting purposes.

1. In addition to the 1st Available Intake/Screening Appointment, it is now required to enter the 2nd Next Available Appointment and the 3rd Next Available Appointment for *Intake/Screening* in the **Contact Profile Screen**. From the Navigation Pane, please go to **Client List**, open **Client Profile** and then click on **Contacts**.



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- Please complete required (yellow) fields on the Contact Profile screen. After selecting **Made an appointment** under the Disposition drop down menu, the 1st Available Intake/Screening Appt, 2nd Available Intake/Screening Appt, 3rd Available Intake/Screening Appt and 1st Accepted Intake/Screening Appt will become available. Please note these are *required* fields.

The screenshot displays the 'Contact Profile' form in the SanWITS system. The form is divided into several sections:

- Client Information:** Client Name, Age, DOB, Gender, Unique Client Number, MPI, SSN.
- Contact Details:** Initial Contact Date (7/1/2019), Status (In Progress), Created Date, Contact Method (Walk-in), Source of Referral (1-individual, including self-referral), Requestor Name, Requestor Phone #.
- Appointment Information:** Contact Reason (Routine Service), If Other, Specify, Call Taker, Location, Contact Made By (Other SUD Provider), LMHA, Benefit Type (Medi-Cal).
- Appointments:** A section containing four required date fields: 1st Available Intake/Screening Appt, 2nd Available Intake/Screening Appt, 3rd Available Intake/Screening Appt, and 1st Accepted Intake/Screening Appt. This section is highlighted with a red box.
- Disposition:** A dropdown menu set to 'Made an appointment', highlighted with a red box and a red arrow pointing to it.
- Notes:** Unsigned Notes and Signed Notes sections, with a 'Sign Note' button.

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3. After completing all the required fields from the Contact Profile screen click **Save**.

The screenshot shows the 'Contact Profile' form. At the top, the status is 'In Progress'. The 'Save' button at the bottom right is highlighted with a red box and a red arrow pointing to it. Other visible elements include fields for Client Name, Age, DOB, Gender, Unique Client Number, MPI, and SSN. The form contains various dropdown menus for Contact Reason, Call Taker, Location, Contact Made By, LMHA, and Benefit Type. There is also a section for Appointments with dates and a 'Sign Note' button.

4. After clicking Save, under the Administrative Actions box, the **Complete Review** hyperlink will become available. Please make sure to review carefully all the information entered in the Contact Screen before clicking Complete Review.

The screenshot shows the 'Contact Profile' form after clicking 'Save'. The status is now 'Completed'. The 'Complete Review' button in the 'Administrative Actions' section at the bottom left is highlighted with a red box and a red arrow pointing to it. The 'Save' button is no longer visible. The form fields and appointment list remain the same as in the previous screenshot.

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5. After Completing Review, the Contact Screen will become grayed-out. Under the Administrative Actions box, the **Create Intake** hyperlink will become available.
6. When ready to create the Intake, click Create Intake

Contact Profile

Client Name: TNNA, Janeth
Age: 45
DOB: 1/1/1974
Gender: Female

Initial Contact Date: 6/26/2019
Status: Completed
Created Date: 6/26/2019 1:01 PM

Contact Reason: Routine Service
Contact Method: Walk-in
If Other, Specify:
Source of Referral: 1-Individual, including self-referral
Call Taker:
Requestor Name:
Location:
Requestor Phone #:
Contact Made By: Other SUD Provider
LMHA:
Benefit Type: Medi-Cal

Appointments

1st Available Intake/Screening Appt	7/1/2019
2nd Available Intake/Screening Appt	7/2/2019
3rd Available Intake/Screening Appt	7/3/2019
1st Accepted Intake/Screening Appt	7/1/2019

Presenting Needs

Disposition: Made an appointment

Unsigned Notes

Signed Notes

Reviewed By:
Review Completed:

Administrative Actions

[Create Intake](#) [Move Contact](#) [Delete](#)

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7. In addition to the 1st Available Tx Appointment, it is now required to enter the 2nd Available Appointment and 3rd Available Appointment for *Treatment* in the **Intake Case Information** screen.

Intake Case Information

Intake Facility	[Redacted]	Case #	1
Intake Staff	[Redacted]	Case Status	Open Active
Manner of Contact	Walk-in	Initial Contact Date	[Redacted]
Residence	San Diego	Intake Date	7/1/2019
Source of Referral	1-Individual, including self-referral	Pregnant	0-No
Referral Contact	[Redacted]	Chronic Life Threatening Illness (CLTI)	No
	Add Collateral Contact	Injection Drug User	No
Referral Date	[Redacted]	Presenting Problem (In Client's Own Words)	[Text Area]
Assessment Date	[Redacted]		

Appointments

1st Available Tx Appt	7/2/2019
2nd Available Tx Appt	7/3/2019
3rd Available Tx Appt	7/4/2019
1st Accepted Tx Appt	7/2/2019

Risk Categories	Selected Risk Categories
All Other Injection Drug User Cognitive Impaired Criminal Justice Foster youth Isolated Elderly	Homeless

Date Closed [Redacted]
Closure Reason [Redacted]

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8. After completing all the required fields on the **Intake Case Information Screen**, please click Save.

Intake Case Information

Intake Facility	<input type="text"/>	Case #	<input type="text" value="1"/>
Intake Staff	<input type="text"/>	Case Status	<input type="text" value="Open Active"/>
Manner of Contact	<input type="text" value="Walk-in"/>	Initial Contact Date	<input type="text"/>
Residence	<input type="text" value="San Diego"/>	Intake Date	<input type="text" value="7/1/2019"/>
Source of Referral	<input type="text" value="1-Individual, including self-referral"/>	Pregnant	<input type="text" value="0-No"/>
Referral Contact	<input type="text"/>	Chronic Life Threatening Illness (CLTI)	<input type="text" value="No"/>
	Add Collateral Contact	Injection Drug User	<input type="text" value="No"/>
Referral Date	<input type="text"/>	Presenting Problem (In Client's Own Words)	<input type="text"/>
Assessment Date	<input type="text"/>		

Appointments	
1st Available Tx Appt	<input type="text" value="7/2/2019"/>
2nd Available Tx Appt	<input type="text" value="7/3/2019"/>
3rd Available Tx Appt	<input type="text" value="7/4/2019"/>
1st Accepted Tx Appt	<input type="text" value="7/2/2019"/>

Risk Categories	Selected Risk Categories
<input type="text" value="All Other Injection Drug User"/> <input type="text" value="Cognitive Impaired"/> <input type="text" value="Criminal Justice"/> <input type="text" value="Foster youth"/> <input type="text" value="Isolated Elderly"/>	<input type="text" value="Homeless"/>
Date Closed	<input type="text"/>
Closure Reason	<input type="text"/>