SanWITS Electronic Health Record (EHR) clinical documentation is expected to be begin in FY 20-21 and will be introduced in phases. These phases will have clear roll-out periods that should not overlap dates.

**PHASE 1**
- Adult Initial Level of Care Assessments
- Adolescent Initial Level of Care Assessment
- Parent/Guardian Initial Level of Care Assessment
- Recommended Level of Care Assessment
- Discharge Summary
- Risk Assessment and Safety Plan
- Diagnostic Determination Note

**PHASE 2**
- Treatment Plan
- Recovery Plan

**PHASE 3**
- Progress Notes
- Additional Assessments / forms

**Additional Enhancements**
- New Look to screens
- Dashboards
- Document Storage
- Scheduler
- CalOMS Outcome Measures
- Interoperability (Data Warehouse)
- Contract and Invoicing Management System (CIMS)
- Void functionality
- QA Chart Review module
- Lab Module Integration
- Various Improvements
NOTE:

- Access to be able to document the client chart (assessments, DDN, treatment plans, recovery plan and progress notes) will be limited to direct service staff only

- To achieve successful results, please consider the following:
  - Program managers are recommended to attend training first, followed by those with prior SanWITS experience and/or strong computer skills
  - New hires should be oriented to their program prior to attending training - sending staff to be trained during their first week of employment tends to be overwhelming because they don’t have the foundation to generalize what they are taught
  - Exposure to documentation training is highly recommended in advance of SanWITS training - the intent of SanWITS training is to learn the functionality of the software, not documentation or clinical standards
  - Details for virtual training opportunities are included in the monthly SUD Up to the Minute newsletter along with documentation webinars available on Optum website at: [https://www.optumsandiego.com/content/sandiego/en/county-staff---providers/dmc-ods.html](https://www.optumsandiego.com/content/sandiego/en/county-staff---providers/dmc-ods.html)
  - Documenting directly into SanWITS is the most efficient method
  - Computer hardware and bandwidth needs should be evaluated by the facilities IT department
  - Basic computer skill proficiencies improve training outcomes - solid skills in computer use such as touch typing using all ten fingers and operating a mouse