

PA WITS
Treatment Agency Administrator Webinar

June 13, 2018

Welcome

- DDAP Presenters
 - Jeff Geibel, Chief, Treatment Division
 - Jennifer Newell, Chief, County Program Oversight
 - Brian Stonesifer, IT Consultant
- This webinar will be recorded
- Please submit questions using the screen sharing chat feature

Meeting Objective

- The objective of this meeting is to provide agency administrators an understanding of why PA WITS changes are being made and the steps that must be taken to use the updated system.

Agenda

- Treatment Manual Updates
- Implementation Plan
- PA WITS Responsibilities
- Agency Set Up Model
- Basic Security Principles
- Setting Up User Accounts
- New Workflow
- Demo
- Troubleshooting Examples
- Next Steps
- Questions



Treatment Manual Updates

Treatment Manual Updates

- Revisions have been made to the DDAP Treatment Manual, effective July 1, 2018.
- New Performance Measures
 - Required to enter case management and treatment (TEDS) data into PA WITS one week from date of first contact

Treatment Manual Updates

New Requirements

- The following components are required for a complete case management record:
 - Must complete Screening tool in PA WITS
 - Must complete Intake in PA WITS
 - Must complete TAP Assessment in PA WITS
 - Must complete Miscellaneous Notes for TB Screening and Gambling Screening
 - Must complete ASAM summary in PA WITS (PCPC available until 12/31/2018 for users not trained in ASAM)
 - Must enter case notes related to case management in PA WITS
 - Must create recovery plan

Changes to PA WITS

- Current PA WITS
 - Collect TEDS data
- New Version PA WITS (July 1, 2018)
 - Collect TEDS data
 - DDAP Treatment Manual compliance



PA WITS Treatment Module Implementation Plan

Implementation Plan

Date	Activity
6/13	<ul style="list-style-type: none">• Treatment agency administrator webinar (today)• Agency Administrator training website available
6/13 – 6/30	<ul style="list-style-type: none">• Agency administrators complete self-service training<ul style="list-style-type: none">• Review staff and agency administrator user guides• Complete all 12 agency administrator training videos• Determine what roles you will assign staff members beginning 7/1
6/19	<ul style="list-style-type: none">• Case management and clinical training website available
7/01	<ul style="list-style-type: none">• PA Data Entry (TEDS) role will be removed for admins• Agency Admin update your account roles• Agency Admin update staff account roles• Agency Admin add new programs (i.e. case management)• Start using the updated system

▶ Training Schedule

On-Demand self-service training will provide a recommended training curriculum which includes: instructional videos, detailed user guides and helpful tips.

Treatment SCAs and Providers

- **6/13/18:** Treatment agency administrator webinar (this webinar)
- **6/13/18:** On-Demand self-service agency administrator training
- **6/19/18:** On-Demand self-service case management and full clinical workflow training



PA WITS Responsibilities

Responsibilities


- **DDAP**
 - PA WITS Service Desk provides tier 2 support for all users
- **SCA**
 - Agency administrator provides tier 1 support for own agency
 - Maintain accurate agency, facility and staff member records in PA WITS
 - Monitor contracted providers and ensure services are entered in accordance with the Treatment Manual
 - Enter case management and treatment service (TEDS) data into PA WITS in accordance with the Treatment Manual
- **Providers**
 - Agency administrator provides tier 1 support for own agency
 - Maintain accurate agency, facility and staff member records in PA WITS
 - Enter case management and treatment service (TEDS) data into PA WITS in accordance with the Treatment Manual

Treatment Agency Administrator

- What does it mean to be an agency administrator?
 - As an **Agency Administrator**, you are in charge of setting up information about your agency, managing facilities and setting up programs.
 - Provide **Staff Administration**, your role is to create and manage staff. This includes setting up new employees and assigning their user accounts the appropriate role assignments.
 - Provide **Tier 1 Support** for your agency; this includes answering any questions on functionality that is covered by training materials, as well as resetting passwords, locking employees that leave your organization and troubleshooting login problems.
 - Setup Treatment Team Groups (if desired)
 - Delete records (i.e. encounters, notes, consent)
 - Champion PA WITS and ensure your staff complete self-service training.
 - Escalate complex issues to PA WITS Service Desk (Tier 2 Support)

PA WITS Support Structure

- **Tier 1 Support: Agency Administrator at SCA or Provider**
 - Be available to address user issues during normal operation hours
 - Create new staff accounts, reset passwords, lock/unlock accounts, change user account permissions
 - Maintain agency, facility and program setup in PA WITS
 - Ensure new users complete on-demand self-service training (ddap.pa.gov)
 - Have a solid understanding of WITS screens, business rules, and processes; be able to help users with any usability issue that is covered in either training manuals or user and system documentation
 - Champion PA WITS at your organization
 - Escalate system errors or complex issues to PA WITS Service Desk (Tier 2 Support)
- **Tier 2 Support: PA WITS Service Desk**
 - Available Monday-Friday, 8 AM – 4:30 PM (except on State Holidays) to answer calls or emails from SCA/Provider Tier 1 support. Email: RA-DAPAWITS@pa.gov Phone: 717-736-7459
 - Work with SCA/Provider agency administrator or staff member to see the issue through to resolution. Only DDAP escalates issues to Tier 3 support
- **Tier 3 Support: FEi Systems**
 - Work with PA WITS Service Desk to resolve system defects or availability issues



PA WITS Agency Set Up Model

Agency Set Up Models

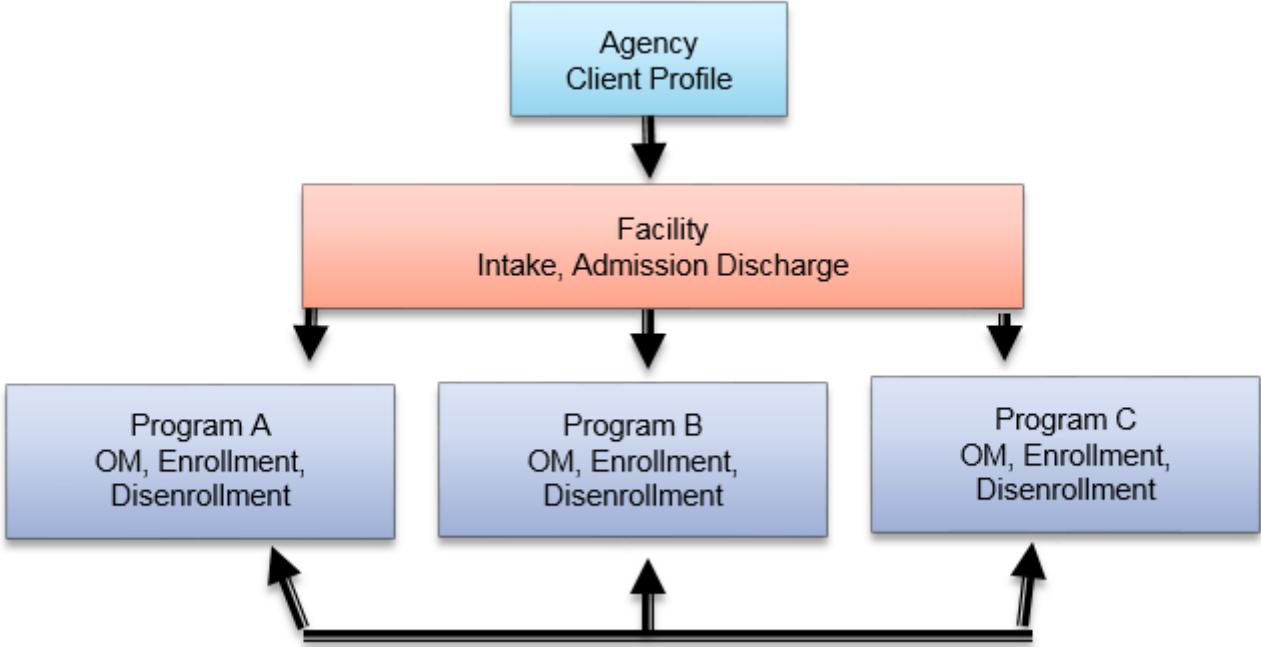
- AGENCY
 - The legal entity that a provider operates within. Some people refer to this as ‘Provider’. Could also be considered as an “umbrella” under which facilities fall.
- FACILITY
 - The physical location (building) that an agency / provider uses to deliver services. A provider can have more than one facility within a single building.
 - License number is maintained at the facility level (i.e. IBHS #, Facility ID)
- PROGRAM
 - The defined plan of treatment for a given set of individuals, equated with a modality. (Example: Adult Intensive Outpatient).

Agency Set Up Models

Structure of the clinical process and related records

- **AGENCY LEVEL**
 - Client Profile is created when a new client who has never been entered in the system comes to the agency.
- Client Profile lives at the Agency level, this means that there can be only one Profile per client per Agency. (requires accurate information i.e. SSN)
- **FACILITY LEVEL**
 - Intake, Screening, Assessment, Admission, Discharge, etc. are created at the Facility level.

Basic Model





PA WITS Basic Security Principles

User Account Roles

User Accounts are assigned roles in PA WITS to access functionality.

- Roles control what screens are made available
- Many roles have a Full Access and Read Only
- (Full Access) user can edit the information
- (Read Only) allows user to see information but not make any changes

TxPlan (Full Access) Full access to all options under Client List/Activity List/Treatment/TxPlan.	Task Group View included roles
TxPlan (Read-Only) Read-Only access to all options under Client List/Activity List/Treatment/TxPlan.	Task Group View included roles



Facility Access

- Agencies can separate access to client records by “associating” staff with only certain facilities in the Staff Member set up.

Facilities:

<input type="text"/>	<input type="text"/>
Facility 2	Facility 4 ✕
Facility 3	Facility 1 ✕

Effective:



09/01/2017  — 



Has end date

Facility Access Continued...

- Facility Assignment for this staff would only allow the staff to access clients with Intakes in Facility 4 and Facility 1

Facility Assignments

Facility 4	09/01/2017 -	 
Program Assignments:		
+ Add Program Assignments		

Facility 1	09/01/2017 -	 
Program Assignments:		
+ Add Program Assignments		
+ Add Facility Assignments		



PA WITS Setting Up User Accounts

PA WITS Users

Types of PA WITS Users

1. Agency and Staff Administrator
2. Clinician/Counselors
3. Case Manager
4. Intake Coordinator

Treatment Provider

Your organization will need to decide how to setup staff member access in PA WITS. By default, WITS assumes all Intake/Cases will have Treatment Team Members (includes case management) assigned to each client. Only Treatment Team Members can view client activities

- **Option 1: Users can only access clients assigned to their caseload**
 - **Assign role:** Clinical Full (without Non-Tx Team)
 - Users can only access client treatment information if they are assigned to the client's treatment team
- **Option 2: Users need to access all clinical data**
 - **Assign role:** Clinical (Full Access)
 - This role provides users with full access to all client treatment data without being on that client's treatment team
- **Option 3: Assign roles by module based on job function (a la carte)**
 - Users can be assigned specific roles to modules in PA WITS

Role Comparison

Option 1: Clinical Full (without Non-Tx Team)

User Account ▾

User ID: **clinical2**

System Roles:

Agency Roles

- Client Diagnosis
- Clinical Full (without Non-Tx Team)

Home Page

- Agency
- Clinical Dashboard
- Client List
- Client Profile
- Linked Consents
- Non-Episode Contact
- Activity List
- Episode List
- System Administration

Client Search

Agency: A BETTER TODAY INC | Facility: []

First Name: [] | Last Name: []

SSN: [] | DOB: []

Pennsylvania-WITS UAT Client Id: []

Unique Client Number: [] | Provider Client ID: []

Treatment Staff: [] | Primary Care Staff: []

Case Status: All Clients | Intake Staff: []

Other Number: [] | Number Type: []

Include Only Active Consents: Yes

Clear **Go**

Client List (Export)

Actions	Unique Client #	Full Name	DOB
	N53511096412410	NonTeam, Test	11/9/1964

Option 2: Clinical (Full Access)

User Account ▾

User ID: **clinical1**

System Roles:

Agency Roles

- Client Diagnosis
- Clinical (Full Access)

Home Page

- Agency
- Clinical Dashboard
- Client List
- Client Profile
- Linked Consents
- Non-Episode Contact
- Activity List
- Episode List
- System Administration

Client Search

Agency: A BETTER TODAY INC | Facility: []

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Case Status: All Clients | Intake Staff: []

Other Number: [] | Number Type: []

Include Only Active Consents: Yes

Clear **Go**

Client List (Export)

Actions	Unique Client #	Full Name	DOB	SSN
	C53007037406000	Candy, Oreo	7/3/1974	000-00-0000
	C45211096147850	ClinicalFull_Test	11/9/1981	123-65-4785
	C20010141303540	Cookie, Oatmeal	10/14/1913	000-00-0000
	G60008197689650	Grrrrr, IGiveUp	8/19/1976	894-57-8955
	H15502272679630	Happening, Not	2/27/1926	214-58-7963
	I50007107221220	In, Phone	7/10/1972	757-34-2122

Option 3: Assign roles by job function

- Intake/Screening Coordinator
 - Note: Non-Treatment Team Access role listed below allows this user to see all client records without being assigned to their treatment team.

User Account ▼

User ID: **Intake1**

System Roles:

Agency Roles

- ClientProfile (Full Access)
- Intake (Full Access)
- Referrals (Full Access)
- Consent (Full Access)
- Non-Treatment Team Access
- Screening (Full Access)

▶ Option 3: Assign roles by job function

- Case Manager 1 (Case Management Agency)

User ID: **casemanager1**

System Roles:

Agency Roles

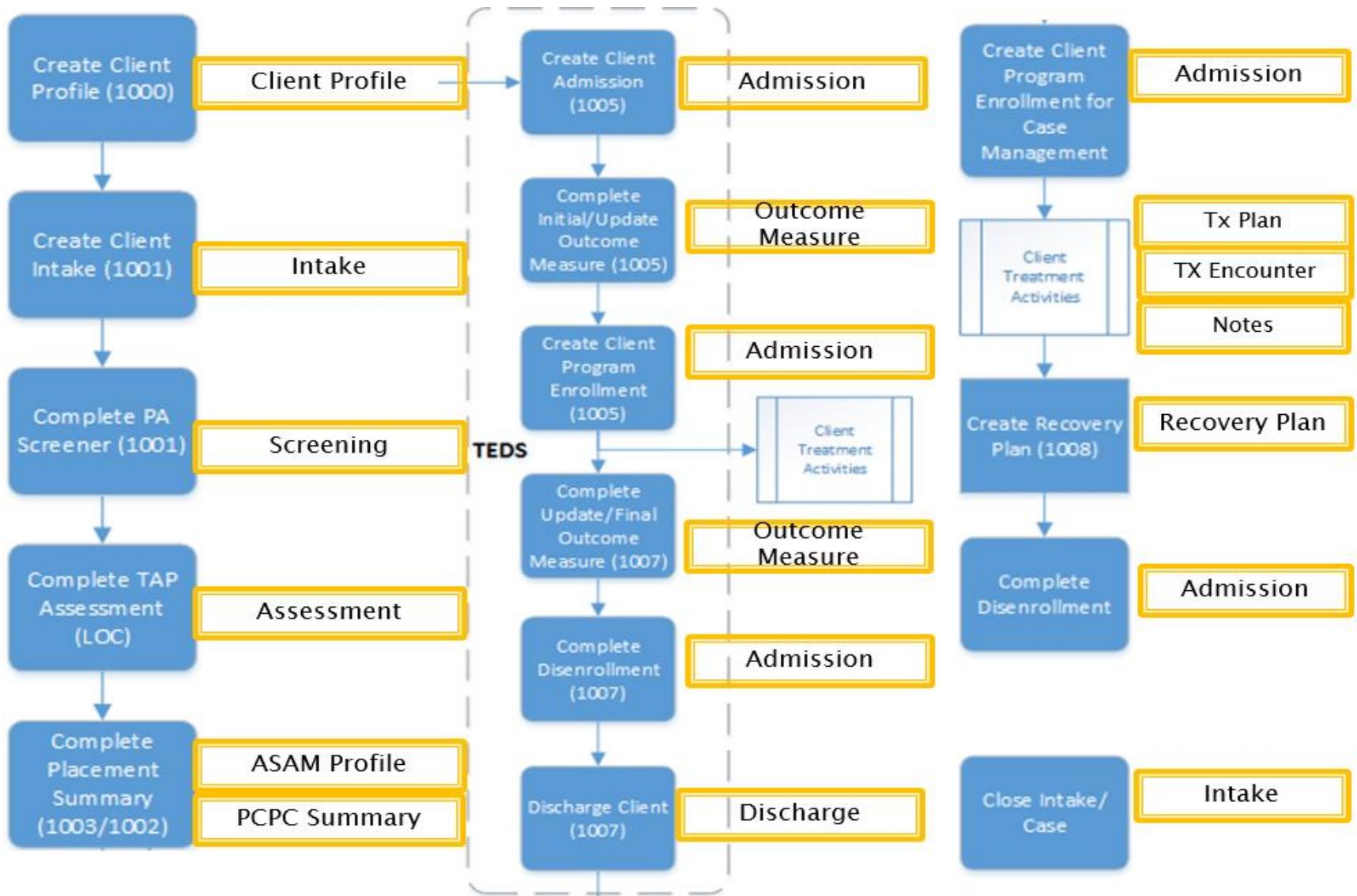
- Admission (Full Access)
- ClientProfile (Full Access)
- Intake (Full Access)
- Non-Treatment Team Access
- Recovery Plan (Full Access)
- Screening (Full Access)
- Assessments (Full Access)
- Consent (Full Access)
- Manage Treatment Team Groups
- Notes (Full Access)
- Referrals (Full Access)



PA WITS New Workflow

PA WITS Workflow

Roles can be Full or Read Only Access



Demo

Demonstration

Demo 1

- Update agency administrator account (your account) with Clinical (Full Access) and add additional roles
 - Roles automatically assigned July 1:
 - Agency Administrator
 - Facility Administrator
 - Staff Administrator
 - Can Grant/Revoke SSRS Roles
 - Suggested roles to add:
 - SSRS Agency User
 - Manage Treatment Team Groups
 - Program Set Up
 - Referrals (Full Access)
 - Case ReOpen
 - Clinical Dashboard Oversight
 - Encounter (Delete)
 - Notes (Delete)
 - Consent (Delete)

Demonstration

Demo 2

- Update existing PA Data Entry user account with Clinical (Full Access) and Client Diagnosis

Demo 3

- Add case management program to your agency

Demo 4

- On-demand self-service training site

Next Steps

▶ Recap Next Steps

- **6/13 – 6/30:**
 - Complete agency administrator and clinical self-service training
 - Decide how your organization will assign access to PA WITS
 - Option 1: Clinical Full (without Non-Tx Team)
 - If this option is selected, you will need to set up treatment team groups (see training)
 - Option 2: Clinical (Full Access)
 - Option 3: Assign specific roles (not recommended)
 - Ensure your PA WITS users complete case management and clinical training
- **7/1:**
 - Setup staff member accounts
 - Setup case management and/or recovery support services programs

Questions and Answers!

Contact PA WITS Service Desk

Email: RA-DAPAWITS@pa.gov

Phone: 717-736-7459

Thank You!