WITS Data Collection and Reporting

AWARDS Instruction Sheet

Overview

AWARDS is equipped to help our SAPTA-funded Nevada agencies to collect and report on all Web Infrastructure for Treatment Services (WITS) data necessary for upload to Nevada's Central Database Repository (CDR). Key elements of WITS data collection and reporting in AWARDS include tracking relevant information at client admission and discharge, as well as use of FormBuilder forms and saved ExportBuilder formats to generate the necessary data files.

Required Permissions and Configuration

WITS data collection and reporting requires chart access permission for those programs whose clients you will be working with, as well as data entry/access permissions to use functionality in the Services and Outcomes modules. For details on the individual permissions needed for each of these AWARDS components and their features, please refer to AWARDS Online Help.

In addition to having the permissions necessary to access relevant functionality, your Foothold Senior Project Manager or Implementation Consultant must also have set up your AWARDS database to use the WITS-related forms, reports, and features detailed throughout this document. If you do not see the various tools referenced here, please reach out to your Foothold Client Services Division representative.

✎ ***Note:*** *The forms and reports associated with generation of WITS data files are "system" reports that cannot be altered from within AWARDS. With these system forms and reports your AWARDS database automatically receives updates if and when regulations change. If you have access to the AWARDS FormBuilder tool and choose to un-designate these forms and reports and system versions, you will be able to make changes to them on your own; however, Foothold will no longer support them, nor will they receive relevant updates.*

About This Document

This document is intended to guide you through the process of using AWARDS to collect WITS data and generate data files that can be used to meet your WITS reporting needs. Specific topics covered are:

Transitioning from TEDS / Getting Set Up - Learn what you need to do in AWARDS to switch from TEDS to WITS.
Working with the Admission File - Learn to collect data for, and generate, the WITS Admission File.
Working with the Client File - Learn to collect data for, and generate, the WITS Client File.
Working with the Discharge File - Learn to collect data for, and generate, the WITS Discharge File.

★ ***Important!*** *Throughout this document you will find abbreviated instructions for basic AWARDS data entry and report generation processes that focus on WITS requirements. For additional information on any of these processes, please refer to Online Help (accessible by clicking* ***Help*** *from the AWARDS navigation bar).*

Transitioning from TEDS / Getting Set Up

WITS data collection and reporting AWARDS replaces the previously existing TEDS equivalents. In building the WITS CDR model in AWARDS, Foothold has worked to carry over the pre-existing TEDS data in your database where possible, minimizing the need for re-entry of previously recorded data. To facilitate this transition, you must complete the following one-time data entry:

- **Mark each client's substance abuse diagnosis as "Primary"** - As in the TEDS model, use the AWARDS Diagnoses feature to complete this data entry. Required in order to ensure that the diagnosis pulls into reports correctly.

- **Mark each COD program client's mental health diagnoses as "Secondary" or "Tertiary"** - Use the AWARDS Diagnoses feature to complete this data entry. Only required for COD programs.

- **Record the program address and facility ID (IBHS Number) for each program that reports to WITS** - Necessary to meet WITS requirements for program-wide data on each line of individual data. Use the AWARDS Add/Edit Entire Program feature to complete this data entry; specifically, be sure to configure the following fields and options:

  – **Optional Settings tab**

    PRU Number - In this field enter the program's Facility ID (IBHS Number). While the field label is hard-coded as "PRU Number," the value specified will populate on your exports with the label "Facility ID (IBHS Number)."

  – **Address / Contact Information tab**

    Street Address
    City
    State
    Zipcode

Working with the Admission File

Collecting Admission File Data

In AWARDS there is a single FormBuilder form used to collect admission, discharge, and update data for WITS CDR, with separate sections for each data type. To collect *admission* data on this form, complete the following steps from the AWARDS *Home* page:

1. Click the **Program** drop-down arrow in the upper-right corner of the page and select the program associated with the client for whom admission data is to be entered.

2. Click **Charts** from the left-hand menu, and then click **Services - Individual**.

3. Click **Forms** from the Services fly-out menu, and then click **WITS CDR-Admit/Discharge**.

4. Select the **Client**, and then click **CONTINUE**. The form index is displayed, including any previously completed forms for the selected client and date range.

5. Click **Create New WITS CDR-Admit/Discharge** to open a new form.

6. Scroll down and click **update WITS CDR-Admit/Discharge Section** to open the form for data entry.

7. Populate the form fields and options, paying careful attention to the following:

    - **Date fields - Date of First Contact** auto-populates with the referral date to the program. **Admission Date (WITS)** auto-populates with the program admission date. WITS CDR counts the **Level of Care** start date as the admission date. If your agency tracks several levels of care within a single program, you may need to change these dates.

    - **Client Transaction Type -** Only the first four selections in the list are appropriate for the admission form. If you select "Discharge" or any of the other options from this list while completing admission data collection, the record will NOT be included in the admission file.

    - **Record Status -** Use this option to indicate whether you want the funder to add or delete this record. Selecting "Active" instructs the funder to add this record. Selecting "Inactive" will cause the funder to delete this record.

    - **Requirements -** For data quality purposes, most fields and options in this form section are required; however, you have the ability to select "Not Applicable," "Unknown," or "Not Collected" where appropriate.

8. Click **CONTINUE** to save the form section and return to the full form.

9. There are three dynamic sections below the main data entry section of the form - Hospitalizations, Diagnoses, and Diagnostic Tests. These sections may be pre-populated with data you or our colleagues have already entered in AWARDS. You can also add to these sections from within the form using the corresponding **Update** buttons. If necessary, do so at this time.

✎ ***Note:*** *Diagnoses and Diagnosis Codes populate directly onto the WITS CRD reports, whereas Hospitalizations and Diagnostic Tests are on the form for reference purposes, to guide you in completing data entry for questions such as "Number of non-SA hospitalizations" and "Have you been tested for TB?"*

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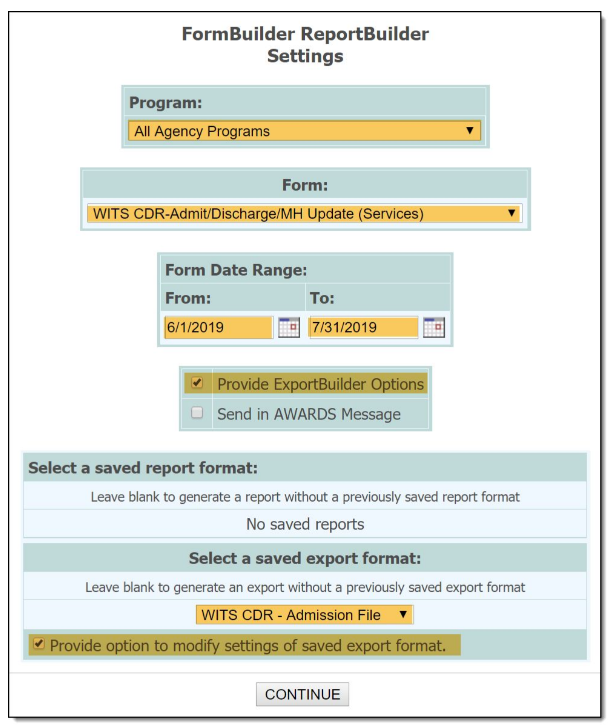
10. If this is a primary mental health client, scroll to the bottom of the form and click **Update Mental Health Clients ONLY**, complete data entry on the corresponding page, and then click **SAVE** to return to the full form.

The process of collecting admission data is now complete.

Generating the Admission File



To generate the WITS CDR Admission file, complete the following steps in AWARDS:

1. From the navigation bar, click **Reports** (or the **Reports icon**).

2. Use the navigation, display, and/or search options to locate the **FormBuilder ReportBuilder** in the index and click on it to open the *ReportBuilder Settings* page.

3. Configure the fields and options on this page as follows (and as highlighted at right):

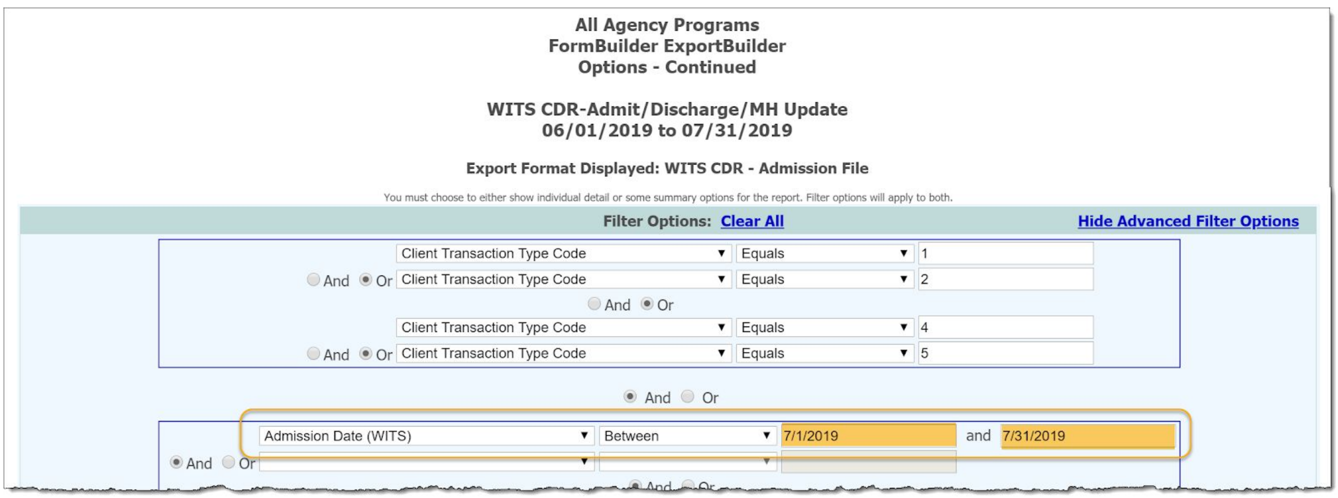
    - **Program -** Select the relevant program / program group.

☀ ***Tip:*** *If your agency has programs that should NOT report to the CDR, the Create Program Groupings feature can be used to create a custom program group that pulls in reporting programs only.*

- **Form -** Select "WITS CDR - Admit/Discharge (Services)."
- **Form Date Range -** Specify "From" and "To" values that reflect the period in which staff completed the CDR form in AWARDS for the reporting period, NOT the reporting period itself.
- **Provide ExportBuilder Options -** Check this option.
- **Select a saved export format -** Select "WITS CDR - Admission File."
- **Provide option to modify -** Check this option.

Leave all other settings on this page as is.

4. Click **CONTINUE**. The *ExportBuilder Options* page is displayed. **Leave all settings on this page as is.**
5. Scroll down to the bottom of the page, and then click **CONTINUE**.
6. Enter a date range for the "Admission Date (WITS)" filter so that it reflects the reporting period; for example:



Leave all other settings on this page as is.

7. Click **CONTINUE TO EXPORT SETTINGS**. The settings page is displayed. **Leave all settings on this page as is.**
8. Click **CONTINUE TO EXPORT SETTINGS**. More settings are displayed. **Leave all settings on this page as is.**
9. Click **GENERATE EXPORT FILE**. The data file is generated.
10. Click **Download TXT File**. Depending on your browser settings, the file is either downloaded and saved to your computer automatically, or opened and displayed (at which point you can choose to save it to your computer manually).
11. Locate the TXT file on your computer and do the following:
    - **Rename the file -** Change the filename to **Admission.txt**.
    - **Open and edit the file -** Using Notepad or a similar application on your computer, open the TXT file and add the following (seven asterisks on each side of "EOF") beneath the last line of file data: *******EOF*******

The process of generating the Admission file is now complete and it can now be submitted to the CDR.

Working with the Client File

Collecting Client File Data

The CDR requires clients to be included in the client file on two occasions:

- **When they are newly admitted to your agency**.
- **When any of the following demographic data changes for the client:**

First and/or Last Name	Sexual Orientation	Gender Identity
Address	Phone Number	

In order to collect demographic data required by the WITS CDR in either of the instances above, additional data entry must be completed in AWARDS using a WITS-specific FormBuilder form and the face sheet. Detailed instructions on each of these data entry pieces is provided below.

Completing the WITS CDR Admit-Discharge Form for a Demographic Data Update

In AWARDS there is a single FormBuilder form used to collect admission, discharge, and update data for WITS CDR, with separate sections for each data type. To collect *update* data on this form, complete the following steps from the AWARDS *Home* page:

1. Click the **Program** drop-down arrow in the upper-right corner of the page and select the program associated with the client for whom update data is to be entered.
2. Click **Charts** from the left-hand menu, and then click **Services - Individual**.
3. Click **Forms** from the Services fly-out menu, and then click **WITS CDR-Admit/Discharge**.
4. Select the **Client**, and then click **CONTINUE**. The form index is displayed, including any previously completed forms for the selected client and date range.
5. Click **Create New WITS CDR-Admit/Discharge** to open a new form.
6. Click **Update WITS Demographics** to open that section of the form for data entry.
7. Make a selection for each of the options provided.

★ ***Important!*** *Sexual orientation and gender identity information is also collected on client face sheets in some agency databases; however, those values are NOT automatically pulled into the WITS form. In the event that the client's sexual orientation and/or gender identity changes during treatment, you must record the new values in the WITS form even if they have already been changed on the face sheet or vice versa.*

8. Click **SAVE** to save the data you entered and return to the full form.
9. Scroll down and click **Update WITS CDR-Admit/Discharge Section** to open that section of the form for data entry.

10. Populate the form fields and options, paying careful attention to the following:

    - **Client Transaction Type -** Select "Demographic update only."

11. Click **CONTINUE** to save the form section and return to the full form.

The process of collecting update data is now complete.

Entering Client Identifiers

The Client Identifiers feature is available as a section of client face sheets, AND within the Entitlements module in AWARDS. (For the purposes of WITS data collection, either of these locations can be used.) Using the Client Identifiers feature you must track the following CDR-required number for each client:

- **Episode Number** - Refers to the episode of care. A client may move through several levels of care in a single episode of care. You must enter, using a single digit, whether this is the client's first (1), second (2), third (3) episode of care, and so on.

  For example, a new client begins treatment at your agency and is placed in a residential level of care. A month later, you determine that she is stabilized enough to step down to intensive outpatient. After a couple more months, you determine she doesn't need as many outpatient sessions during the week, and step her down again to regular outpatient. Finally, she is ready to complete treatment, so you discharge her from the agency and close her chart. While WITS CDR would consider this three separate admissions and discharges (three levels of care started and ended), this is ONE episode of care. Because it is the first episode, the Episode Number should be set to 1 in the Client Identifiers feature.

  In the same example, several months later, the client's close family member passes away. She becomes depressed and relapses, then returns to your agency to reenter treatment. In the Client Identifiers feature, you would then change the Episode Number from 1 to 2 as her second episode of care begins.

Filling in Additional Face Sheet Fields Required by WITS

The following face sheet data entry must be completed for each client for WITS data collection purposes:

- **Sex at Birth** - The **Sex at Birth** option is located in the "Demographic Data" portion of client face sheets. This value, which is required by WITS, can be populated as you do any other face sheet demographics field in AWARDS.

- **Date of Last WITS Demographic Update -** An update to any of the following five key values (in the location specified here) requires you to update the **Date of Last WITS Demographic Update** for the client:

First and/or Last Name (face sheet)	Sexual Orientation (WITS form)	Gender Identity (WITS form)
Address (face sheet)	Phone Number (face sheet)	

  To do so, complete the following steps from within the client's face sheet:

  1. Click the **Forms/Assessments** link at the top of the page, and then click **WITS Demographic Update Indicator**.

  2. On the page that is then displayed, click **Update WITS Demographic Update Indicator Section** to open it for data entry.

  3. Fill in the update date, and then click **SAVE** to apply your change.

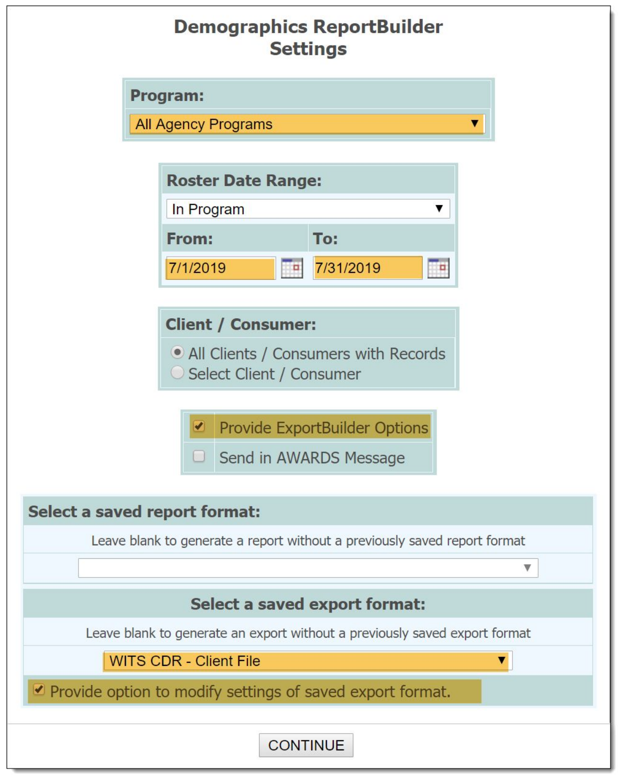
Generating the Client File

Two separate client files must be generated in AWARDS - one for new admissions, and one for pre-existing admissions. Once they have each been generated they must be combined into a single file for submission.

Generating the WITS Client File for Pre-Existing Admissions

To generate the WITS Client file for pre-existing admissions, complete the following steps in AWARDS:

1. From the navigation bar, click **Reports** (or the **Reports icon**).
2. Use the navigation, display, and/or search options to locate the **Demographics ReportBuilder** in the index and click on it to open the *ReportBuilder Settings* page.
3. Configure the fields and options on this page as follows (and as highlighted at right):



   - **Program -** Select the relevant program / program group.

   Tip: If your agency has programs that should NOT report to the CDR, the [Create Program Groupings](#) feature can be used to create a custom program group that pulls in reporting programs only.

   - **Roster Date Range -** Specify "From" and "To" values that reflect the reporting period.
   - **Provide ExportBuilder Options -** Check this option.
   - **Select a saved export format -** Select "WITS CDR - Client File."
   - **Provide option to modify -** Check this option.

   Leave all other settings on this page as is.

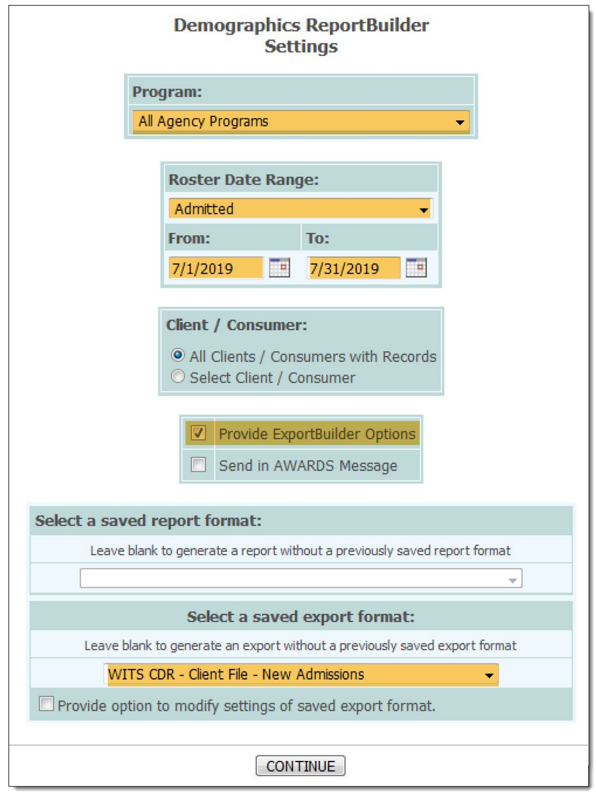
4. Click **CONTINUE**. The *ExportBuilder Options* page is displayed. **Leave all settings on this page as is.**
5. Scroll down to the bottom of the page, and then click **CONTINUE**.
6. Enter a date range for the "Face Sheet Last Updated Date" filter so that it reflects the reporting period. **Leave all other settings on this page as is.**
7. Click **CONTINUE TO EXPORT SETTINGS**. The settings page is displayed. **Leave all settings on this page as is.**
8. Click **CONTINUE TO EXPORT SETTINGS**. More settings are displayed. **Leave all settings on this page as is.**
9. Click **GENERATE EXPORT FILE**. The data file is generated.
10. Click **Download TXT File**. Depending on your browser settings, the file is either downloaded and saved to your computer automatically, or opened and displayed (at which point you can choose to save it to your computer manually).

The process of generating the WITS Client file for pre-existing admissions is now complete. Proceed with generating the Client file for new admissions.

Generating the WITS Client File for New Admissions

To generate the WITS Client file for new admissions, complete the following steps in AWARDS:

1. From the navigation bar, click **Reports** (or the **Reports icon**).
2. Use the navigation, display, and/or search options to locate the **Demographics ReportBuilder** in the index and click on it to open the *ReportBuilder Settings* page.
3. Configure the fields and options on this page as follows (and as highlighted at right):



   - **Program -** Select the relevant program / program group.

   ☀ ***Tip:*** *If your agency has programs that should NOT report to the CDR, the Create Program Groupings feature can be used to create a custom program group that pulls in reporting programs only.*

   - **Roster Date Range -** Select "Admitted" and then specify "From" and "To" values that reflect the reporting period.
   - **Provide ExportBuilder Options -** Check this option.
   - **Select a saved export format -** Select "WITS CDR - Client File - New Admissions."

   Leave all other settings on this page as is.

4. Click **CONTINUE**. The data file is generated.
5. Click **Download TXT File**. Depending on your browser settings, the file is either downloaded and saved to your computer automatically, or opened and displayed (at which point you can choose to save it to your computer manually).

The process of generating the new admissions WITS CDR Client file is now complete. Proceed with combining the two client files - the final step before submission.

Combining the WITS Client Files / Preparing for Submission

Prior to submission, the separate WITS Client files for pre-existing admissions and new admissions must be combined into a single file. To do so, complete the following steps:

1. Locate ONE of the client TXT files on your computer and, using Notepad or a similar application on your computer, open that file.
2. Select all text in the file and use the application's **Copy** feature, or **<Ctrl+C>** to copy it to your computer's clipboard.
3. Locate the SECOND of the client TXT files on your computer and also using Notepad or a similar application, open that file.

4. Modify the SECOND file as follows:

    - **Paste in the data copied from the first file -** Use the application's **Paste** feature, or **<Ctrl+V>** to do so.
    - **Edit the file -** Add seven asterisks on each side of "EOF" beneath the last line of file data: ***********EOF*********
    - **Rename the file -** Change the filename to **Client.txt**.

The process of combining the Client file is now complete and it can now be submitted to the CDR.

Working with the Discharge File

Collecting Discharge File Data

In AWARDS there is a single FormBuilder form used to collect admission, discharge, and update data for WITS CDR, with separate sections for each data type. To meet WITS CDR requirements, providers must complete an instance of this form when a client is discharged from a level of care; to do so, do the following from the AWARDS *Home* page:

1. Click the **Program** drop-down arrow in the upper-right corner of the page and select the program associated with the client for whom discharge data is to be entered.
2. Click **Charts** from the left-hand menu, and then click **Services - Individual**.
3. Click **Forms** from the Services fly-out menu, and then click **WITS CDR-Admit/Discharge**.
4. Select the **Client**, and then click **CONTINUE**. The form index is displayed, including any previously completed forms for the selected client and date range.
5. Click **Create New WITS CDR-Admit/Discharge** to open a new form. The form pre-populates with the data from the last iteration of this form, whether that was the admission or an update.
6. Scroll down and click **Update WITS CDR-Admit/Discharge Section** to open the form for data entry.
7. Change any existing values for the form's fields and options as needed. When completing this step pay careful attention to the following:
    - **Client Transaction Type -** From this drop-down list select one of the discharge options. If you do NOT do so it will result in this record being excluded from the discharge file.
8. Click **CONTINUE** to save the form section and return to the full form.
9. Scroll down and click **Update Discharge Data** to open the discharge-specific portion of the form.
10. Configure the fields and options on this page.

    ✎ ***Note:*** *If you have already processed the client's discharge from this program in AWARDS, the **Discharge Date (WITS)** field pre-populates with the AWARDS program discharge date. If you have not yet discharged the client from the AWARDS program, this field is blank and a value must be entered manually.*

11. Click **SAVE** to save the discharge data and return to the full form.

The process of collecting discharge data is now complete.

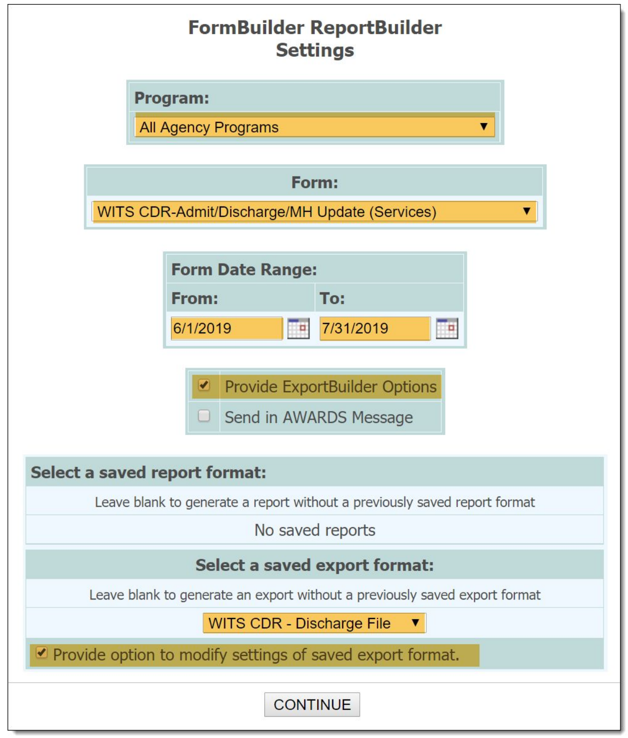
Generating the Discharge File

To generate the WITS CDR Discharge file, complete the following steps in AWARDS:

1. From the navigation bar, click **Reports** (or the **Reports icon**).

2. Use the navigation, display, and/or search options to locate the **FormBuilder ReportBuilder** in the index and click on it to open the *ReportBuilder Settings* page.

3. Configure the fields and options on this page as follows (and as highlighted at right):



   - **Program -** Select the relevant program / program group.

   ☀ ***Tip:*** *If your agency has programs that should NOT report to the CDR, the* [*Create Program Groupings*]() *feature can be used to create a custom program group that pulls in reporting programs only.*

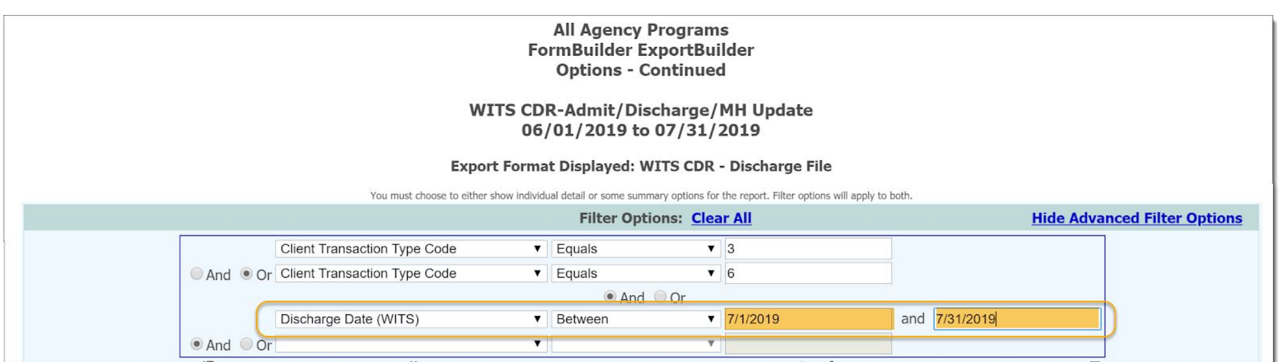
   - **Form -** Select "WITS CDR - Admit/Discharge (Services)."
   - **Form Date Range -** Specify "From" and "To" values that reflect the period in which staff completed the CDR form in AWARDS for the reporting period, NOT the reporting period itself.
   - **Provide ExportBuilder Options -** Check this option.
   - **Select a saved export format -** Select "WITS CDR - Discharge File."
   - **Provide option to modify -** Check this option.

   Leave all other settings on this page as is.

4. Click **CONTINUE**. The *ExportBuilder Options* page is displayed. **Leave all settings on this page as is.**

5. Scroll down to the bottom of the page, and then click **CONTINUE**.

6. Enter a date range for the "Discharge Date (WITS)" filter so that it reflects the reporting period; for example:



Leave all other settings on this page as is.

7. Click **CONTINUE TO EXPORT SETTINGS**. The settings page is displayed. **Leave all settings on this page as is.**

8. Click **CONTINUE TO EXPORT SETTINGS**. More settings are displayed. **Leave all settings on this page as is.**

9. Click **GENERATE EXPORT FILE**. The data file is generated.

10. Click **Download TXT File**. Depending on your browser settings, the file is either downloaded and saved to your computer automatically, or opened and displayed (at which point you can choose to save it to your computer manually).

11. Locate the TXT file on your computer and do the following:

    - **Rename the file -** Change the filename to **Discharge.txt**.

    - **Open and edit the file -** Using Notepad or a similar application on your computer, open the TXT file and add the following (seven asterisks on each side of "EOF") beneath the last line of file data: *******EOF*******

The process of generating the Discharge file is now complete and it can now be submitted to the CDR.