West Virginia SOR II End User Guide

SOR II Grant User Guide

West Virginia

Last Updated February 2022

Version 1

West Virginia
SOR II Grant

Preface

SOR II grants have been awarded to increase access to and to improve the quality of community mental and substance use disorder (SUD) treatment services through the expansion of Certified Community Behavioral Health Clinics (CCBHC).

Intended Audience

This Standard SOR II user guide has been prepared for provider agency staff members delivering SOR II services to individuals. Information included will assist providers in understanding the standard WITS SOR II system and the data entry requirements for the SOR II grant.

Note: Screen captures, and other information included in this Standard SOR II user guide may differ based on the settings established for your Training and/or Production site(s).

System Requirements

WITS is a web-based application accessed through an Internet (web) browser using an Internet connection.

Internet Browsers

WITS is compatible with up-to-date versions of most modern Internet browsers such as:

- Apple® Safari®
- Google Chrome™
- Mozilla® Firefox®
- Microsoft Edge

Note: Do not allow your Internet browser to save your password, as this information will be routinely updated.

Pop-up Blocker

Certain features in WITS, such as Snapshot and Scheduler, will open in a separate browser window when selected. Make sure your browser allows pop-ups from WITS.

Customer URL Links

Training Site: https://wv-training.witsweb.org

The training site allows staff members to practice using the system before entering actual data in the production site. *Please do not enter real client information into the training site.*

Production Site: https://wv.witsweb.org

Contents

Note: Notes contain information for users to take note of, as the information may affect what the user does with the system.

Tip: Tips contain information helpful to the user, such as providing an easier way to do something.

Important: Typically, these highlight details for the user to consider or review before continuing with a step or action within the system. This information may warn the user about possible error messages that may occur if the instructions are not followed, or it may indicate/remind users of additional actions to take before proceeding, such as downloading required software.

Part 1: WITS Information

WITS allows providers to easily enter information for individuals and services they receive as part of the SOR II program.

- The initial provider agency that works with an individual will create the client profile, intake, and enroll the client into a SOR II program.
- If the provider agency needs to refer an individual to another provider for services, WITS has an automated consent/referral process that is HIPAA/42 CFR Part 2 compliant. Once the referred-to service provider accepts the referral, WITS will automatically set up the client profile, intake and SOR II program enrollment.
- SAMHSA has OMB certification for the GPRA, so that the initial agency can enter GPRAs or the referred-to agency can enter the GPRAs. WITS will ensure that there are no duplicate GPRAs created for individuals enrolled in the SOR II program. Also, if the providers have entered encounters, WITS will map those encounters to the SOR II discharge GPRA.

Workflow Diagram

The following diagram illustrates the standard SOR and SOR II workflow process.

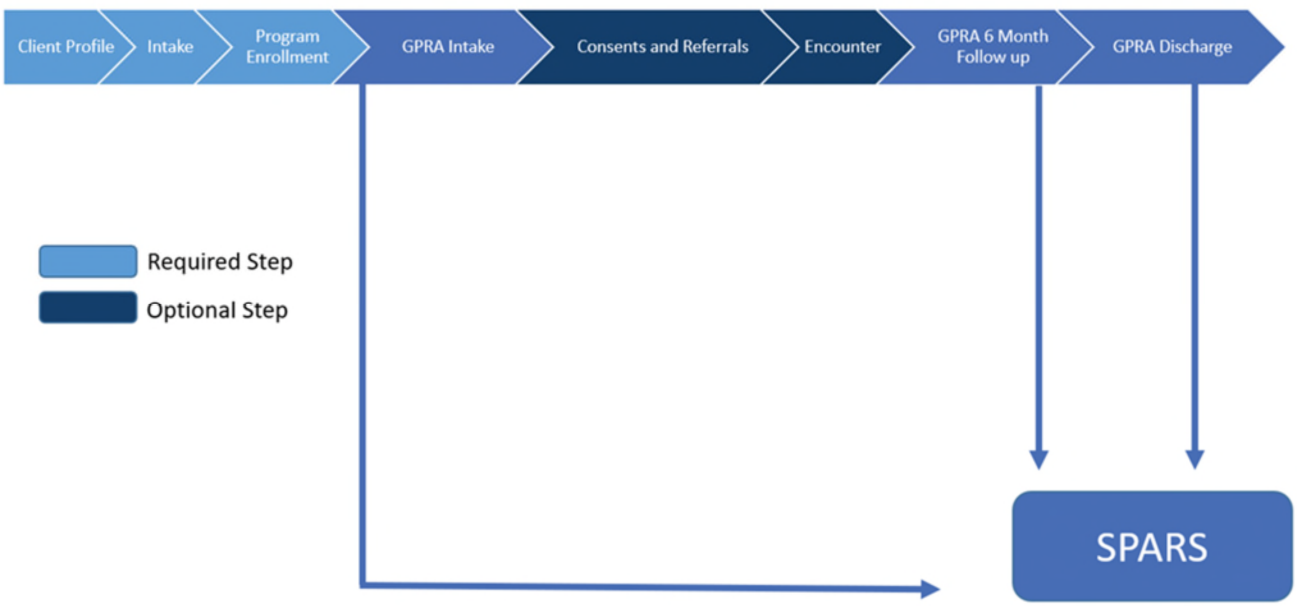


Figure 1-1: Standard SOR II Workflow Diagram

Grant Episode Concepts

Where:* *Agency* > *Agency List* > *Facility List* > *Programs

Background

When a client's GPRA interviews are completed, they are sent to SPARS. Each type of GPRA Interview (Intake, 6-Month follow up, Discharge) is sent automatically as an upload from WITS. If the same type of GPRA is sent twice (for example, if two GPRA Intakes are completed), SPARS will inactivate the first GPRA Intake interview when the second is completed. In order to prevent older interviews being inactivated in error, WITS has a grant episode.

Grant Episode Concepts

Table 1-1: Grant Episode Events and Information

Event	Information
GPRA Menu Item	The ability to enter a GPRA in WITS only becomes available when a WITS client program enrollment (CPE) exists where the associated program has a value in the Grant field and the end user has the GPRA (Full Access) security access role.
Grant Episode	This allows the client to be referred to other agencies and have the same grant episode. If Agency A completes the GPRA Intake and then refers the client to Agency B, Agency B will be able to continue the grant episode and complete the GPRA 6-Month Follow Up and GPRA Discharge interviews for the same client. This will prevent another agency from inadvertently inactivating the previous GPRA Intake because the grant episode will remain assigned to this client in other agencies. 1. The Grant Episode is created and put into a 'Pending' status when the Client Program Enrollment (CPE) is created for a program with a Grant field value. 2. The Grant Episode follows the client's UCN throughout the process of creating GPRAs. 3. The 'Pending' grant episode will become 'Active' once the GPRA Intake interview is completed. 4. It will remain active through the 6-Month Follow-Up and Discharge interviews. 5. Once all 3 interviews are completed, the Grant Episode will have a status of 'Closed.' 6. Once the Grant Episode is 'Closed', a new 'Pending' Grant Episode can then be created if the client needs treatment again. 7. The WITS Administrator could change Grant Episode from 'Active' to 'Inactive' (this can be done upon creation of a client program enrollment within a different agency)

WITS Administrator Process

Use Case: Client with GPRA intake at one provider goes to another provider <u>without</u> a WITS consent/referral

1. If the client goes to another provider who attempts to add a Client Program Enrollment in SOR II and that client/UCN already has an 'active' grant episode, the system will prohibit this.
   - The provider/user will be presented with a WITS error message to contact their WITS Administrator with the client's information.

There is a problem creating this client record. Please contact your system administrator to resolve this conflict."

2. The WITS Administrator will then be able to determine if the client can be added within the agency by either continuing the existing episode or creating a new episode (which will inactivate the previous episode).

Part 2: Client Setup

Search for a Client

Where: Client List Screen

Before creating a new client record, search for your client to make sure the client is not already in WITS.

1. To view clients within your agency, click on the **Client List** menu item. A blank Client List screen will appear.
2. Use the fields in the **Client Search** section to narrow your results.

> **Tip**: When searching for a client, try to use unique information, such as birthdates or social security numbers, if possible. You can also enter a partial name (or other field) followed by a "*****". This is called a **wild card search**. For instance, if you search for Last Name of "Smit*", the search results will display people with the last name of "Smith", "Smitty", "Smithson", etc.

3. After selecting from the search fields, click **Search** to view the results.

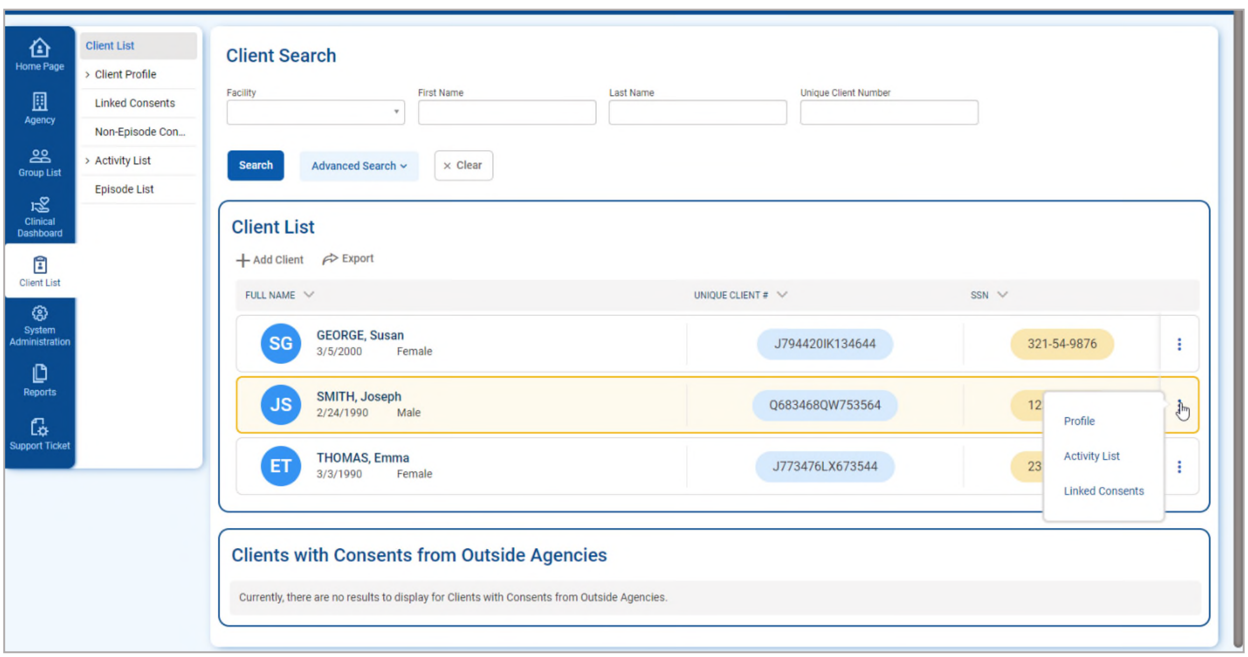


Figure 2-1: Client List screen, Action links

4. Look for your client in the **Client List**. If you find the right person, view their profile by pointing to the three dots icon in the Actions column and clicking the **Profile** link. If you do not find your client, you can create a new client record.

Client Search Tips

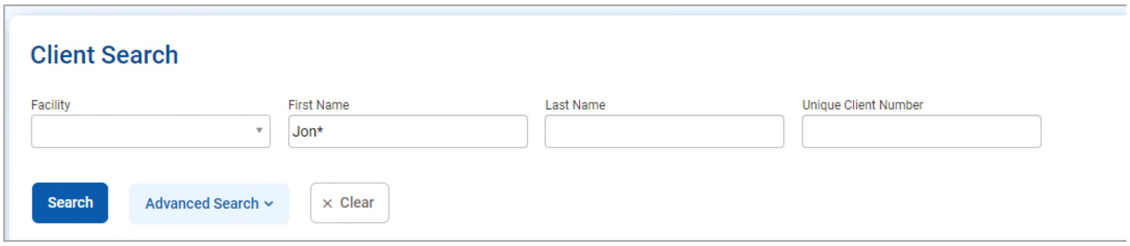
Client Name or Number

Use a client's nickname or alternate names in the **First Name** or **Last Name** fields.

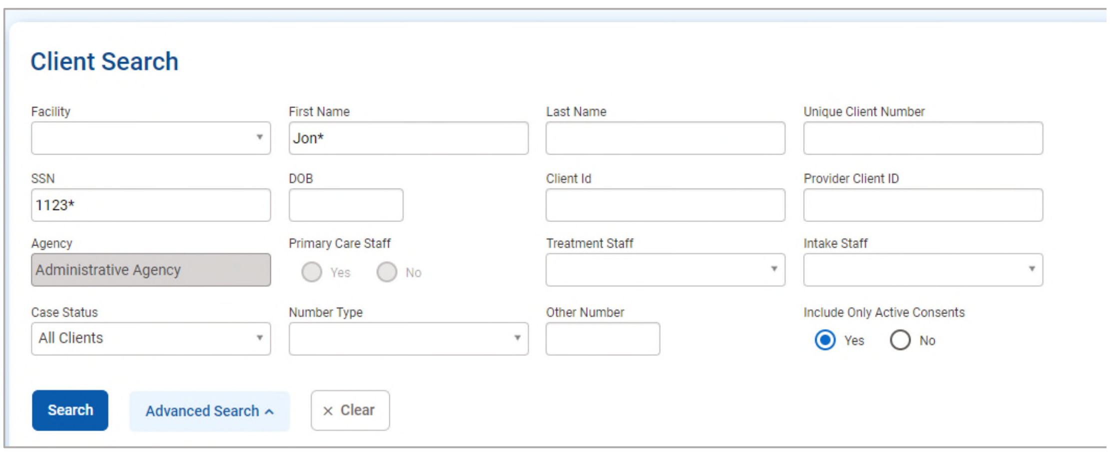
Use an **asterisk** (*) to perform a wildcard search.

Examples:

- Find clients whose last name starts with "Jon": Jon*



- Search by the last 4 digits of a client's SSN: *1123



Create Client Profile

Where: Client List > Client Profile

To add a new client to the system, follow the steps below.

Note: Please search for each client before creating a new record.

1. On the left menu, click **Client List**.
2. On the Client List screen, click **Add Client**.

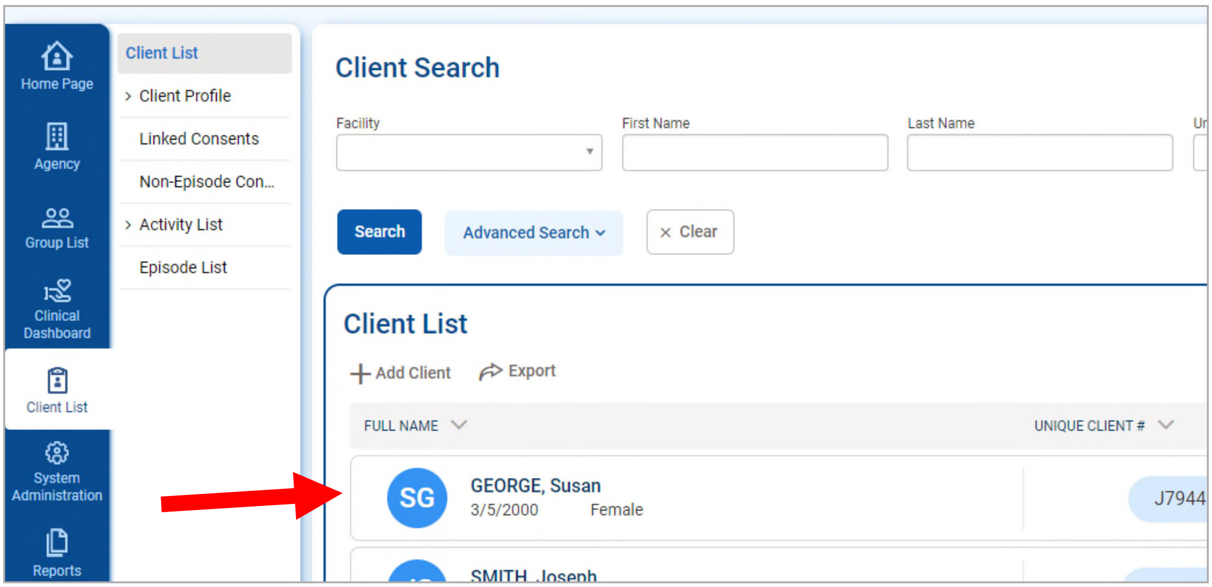


Figure 2-2: Client Search/List screen; Add Client link

3. On the **Client Profile** screen, enter the required client information. See the table below for information on each field.

Important: When adding new clients to the system, review the Client Profile fields for accuracy before saving the screen. Once the Client Profile screen is saved, a Unique Client Number (UCN) is created based on the data provided. It is important to enter client information correctly to avoid duplicate client entry in the future.

Table 2-1: Client Profile fields

Field	Description
First Name	Type the client's current first name.
Middle Name	(Optional)
Last Name	Type the client's current last name.
Gender	Select the client's gender from the drop-down list.
DOB	Enter the client's date of birth.
SSN	Type the last four digits of the client's Social Security Number.

Field	Description
Provider Client ID	(Optional)

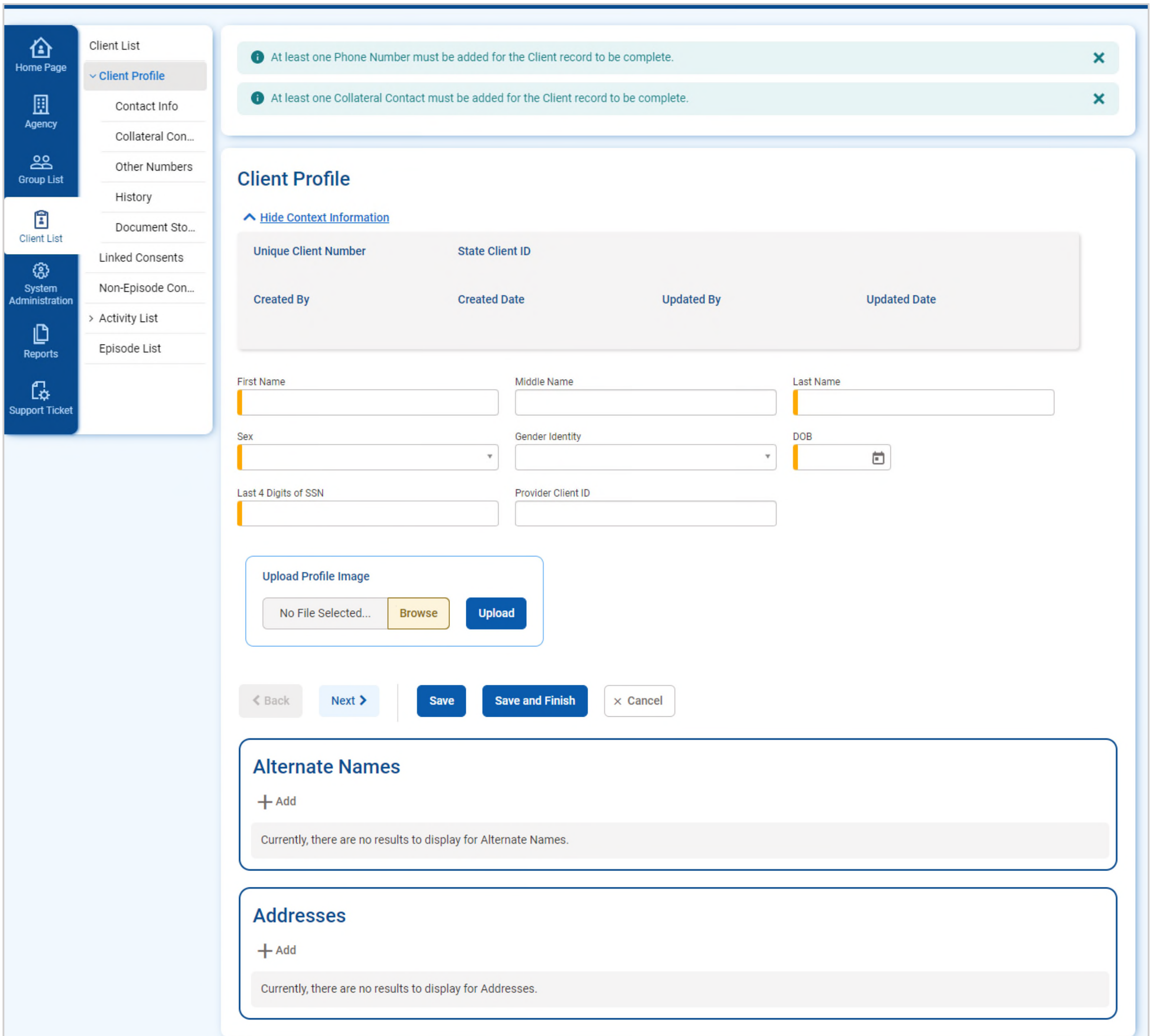


Figure 2-3: Client Profile screen

4. Click **Save**.

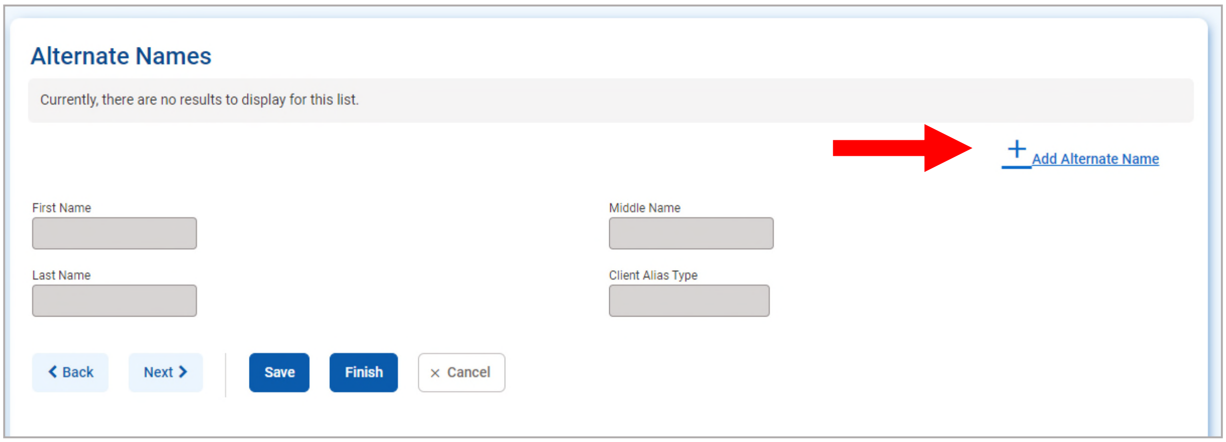
5. Click the **Next button** to move to the **Alternate Names** screen.

Alternate Names

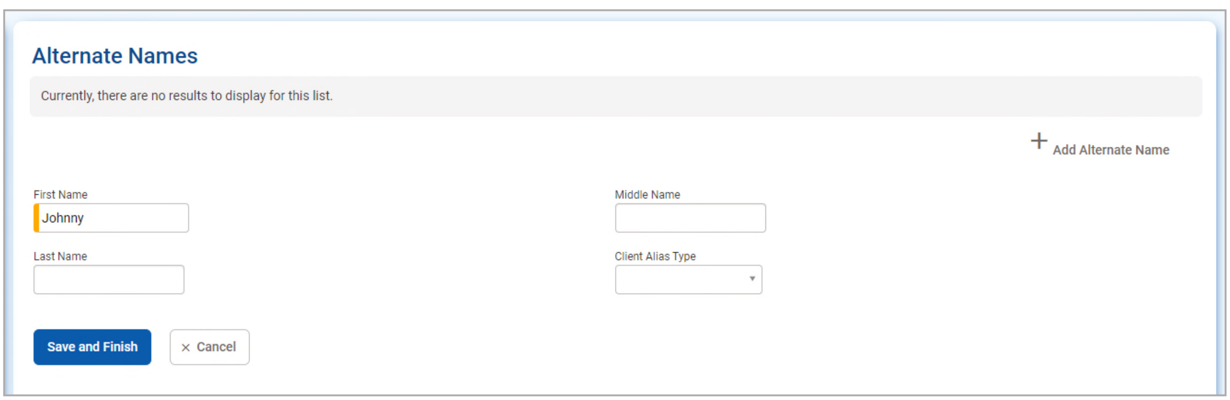
The client's nickname or street name may be entered on this screen

> **Tip**: Alternative names can also be used to search for the client's profile in the future. On the Client Search screen, type the client's alternative name in the First Name and/or Last Name fields.

1. On the Alternate Names screen, click **Add Alternate Name**, and the fields become editable.



2. Complete at least the **First Name** field.



3. Click **Save and Finish**. The name will now appear in the list at the top of the screen.
4. From the Alternate Names screen, click the **Next** button to open the **Additional Information** screen.

Additional Information

1. On the **Additional Information** screen, fields that are required.

Table 2-2: Additional Information screen

Field	Description
Ethnicity	Select from the drop-down list.
Selected Races	Select one or more races.
Veteran Status	Select from the drop-down list.

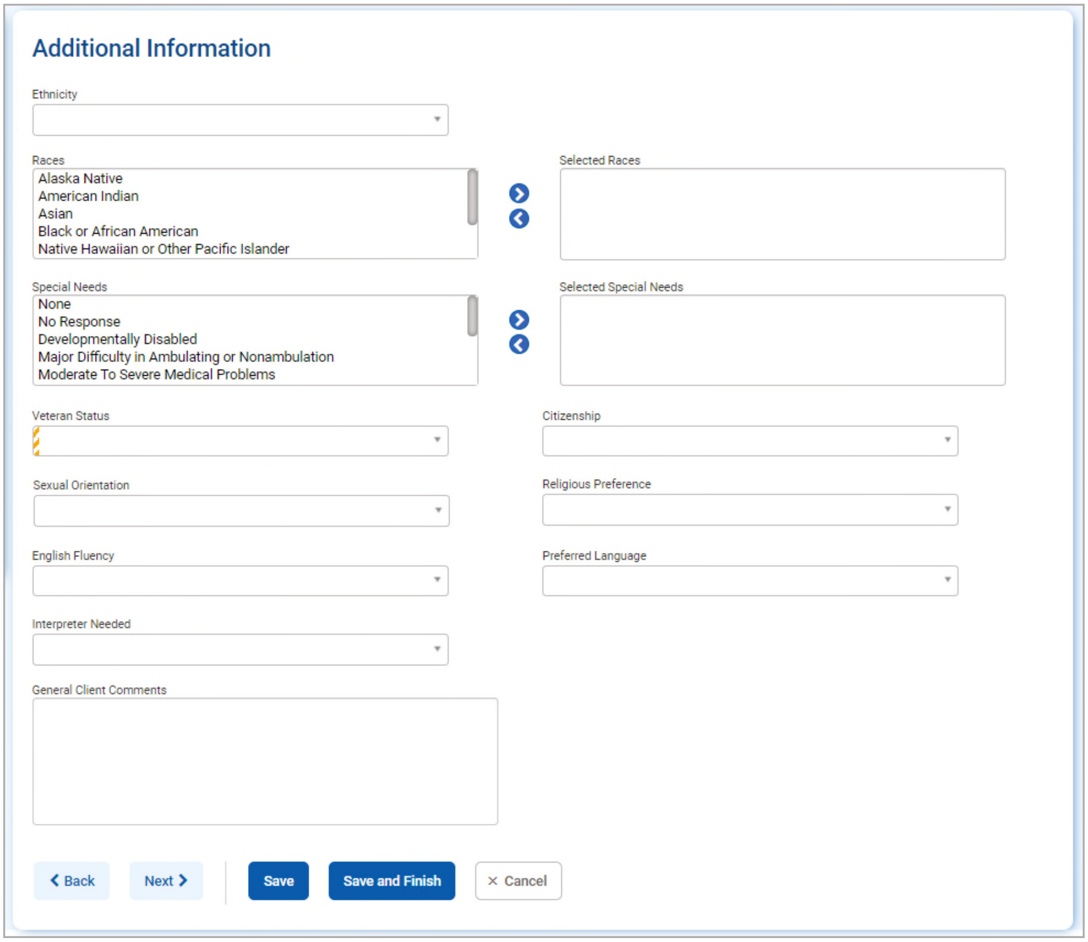


Figure 2-4: Standard SOR II screen

2. When complete, click **Save**, then click the **Next** button to open the **Contact Info** screen.

Contact Info

Tip: Enter the client's contact information on this screen to help locate the client for follow-ups.

1. On the **Contact Info** screen, a phone number must be entered for the client. The preferred method of contact will appear on the Client Header for the client.
2. To enter an address, click **Add Address**. This will open the Address Information screen.

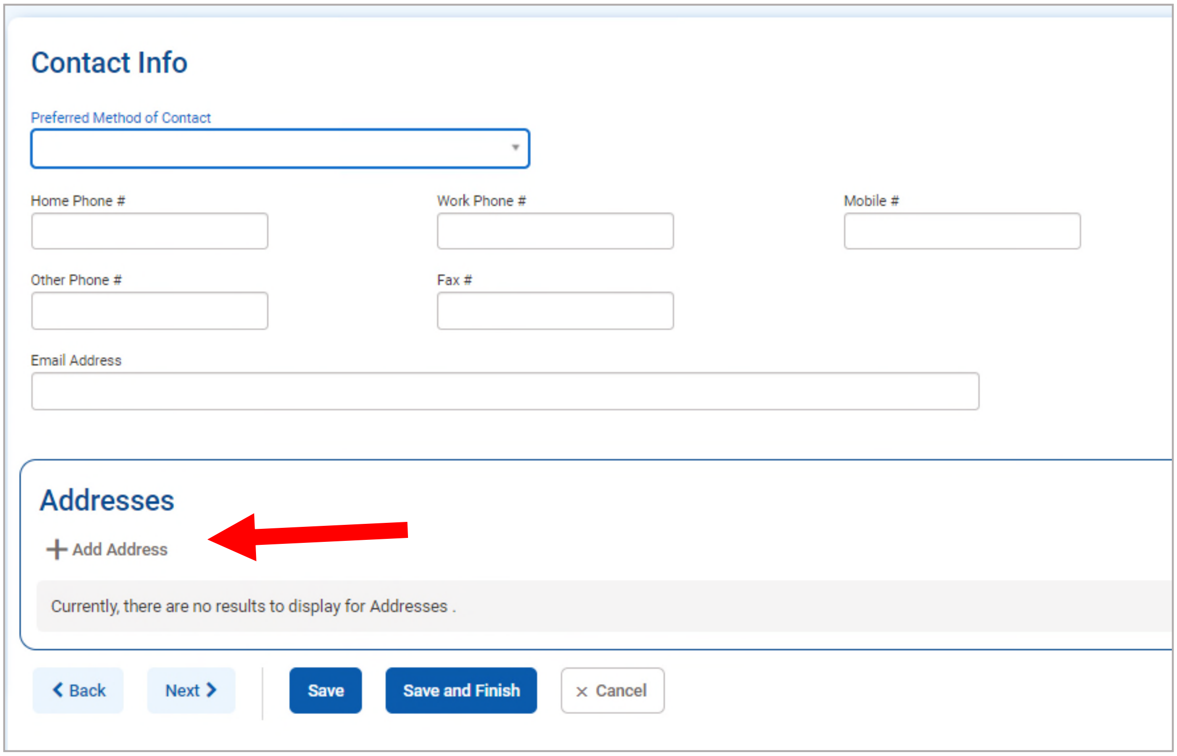


Figure 2-5: Contact Info screen

3. Enter the client's Address Type, Address line 1, City, State, and Zip Code.

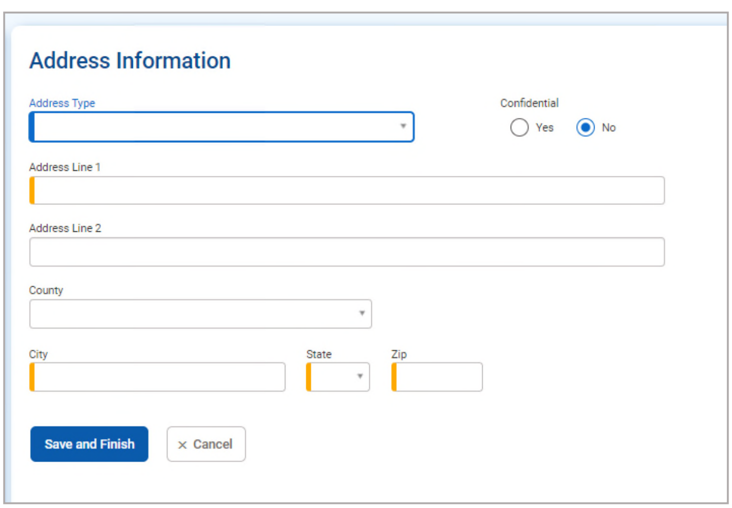


Figure 2-6: Address Information screen

4. When complete, click **Save and Finish**, and the client's address information will show up on the Contact Info screen. You may enter several addresses for a client. If a client has a new address, update the Address Type of the current address record to "Previous", then create a new address.

5. From the **Contact Info** screen, click the **Next** button to open the **Collateral Contacts** screen.

Collateral Contacts

Tip: Enter any collateral contacts for the client on this screen to help locate the client for follow-ups.

1. On the **Collateral Contacts** screen, click the **Add Contact** link.

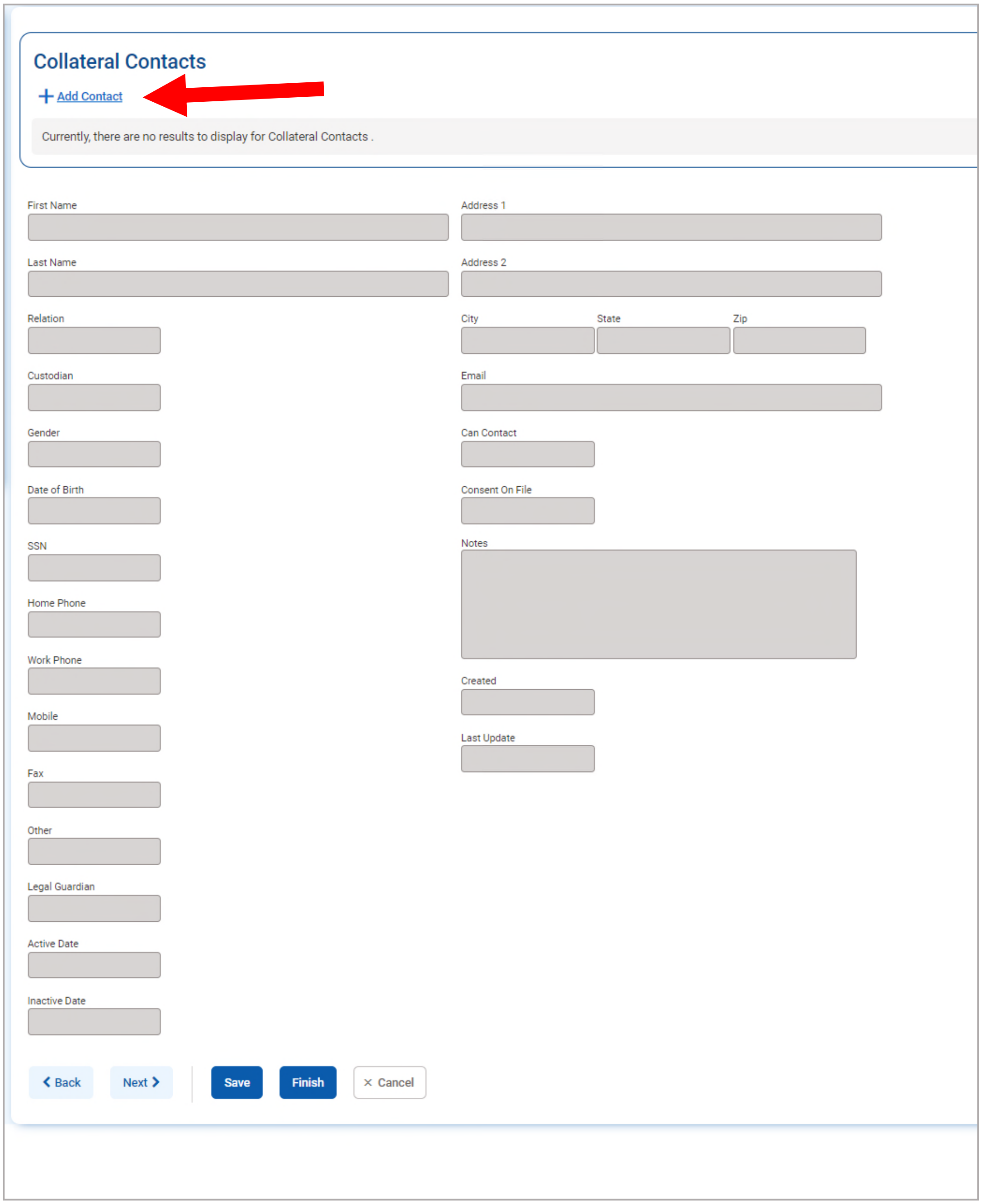


Figure 2-7: Collateral Contacts screen, click Add Contact

2. Enter the required client information. See the table below for information on the required fields.

Table 2-3: Collateral Contacts required fields

Field	Description
First Name	Type the contact's first name.
Last Name	Type the contact's last name.
Relation	Select the collateral contact's relation to the client from the drop-down menu.
Address, **City**, **State**	Type the contact's address information
Can Contact	Select Yes or No.
Consent On File	Select Yes or No.

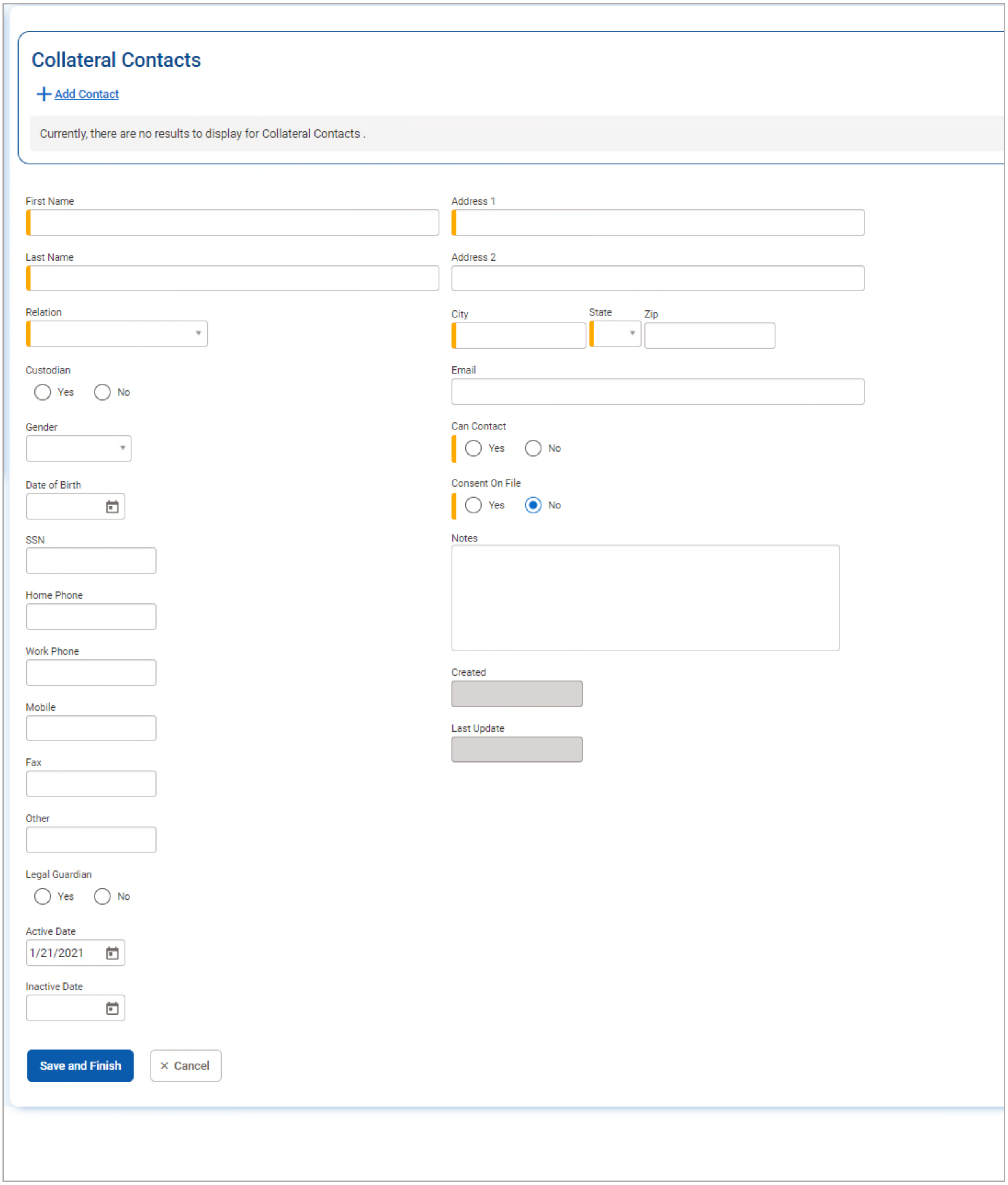


Figure 2-8: Add Collateral Contacts screen

3. When complete, click **Save and Finish.** The collateral contact name(s) will be displayed in the list section of the screen.

4. From the **Collateral Contacts** screen, click the **Next** button to open the **Other Numbers** screen.

Other Numbers

In this section, users can add additional identifying numbers for a client, such as a court case number.

1. On the **Other Numbers** screen, click the **Add Other Number** link. The bottom half of the screen now becomes editable.

2. Fill in information such as, Number Type, Number, Start and End Date, Status, and Contact.

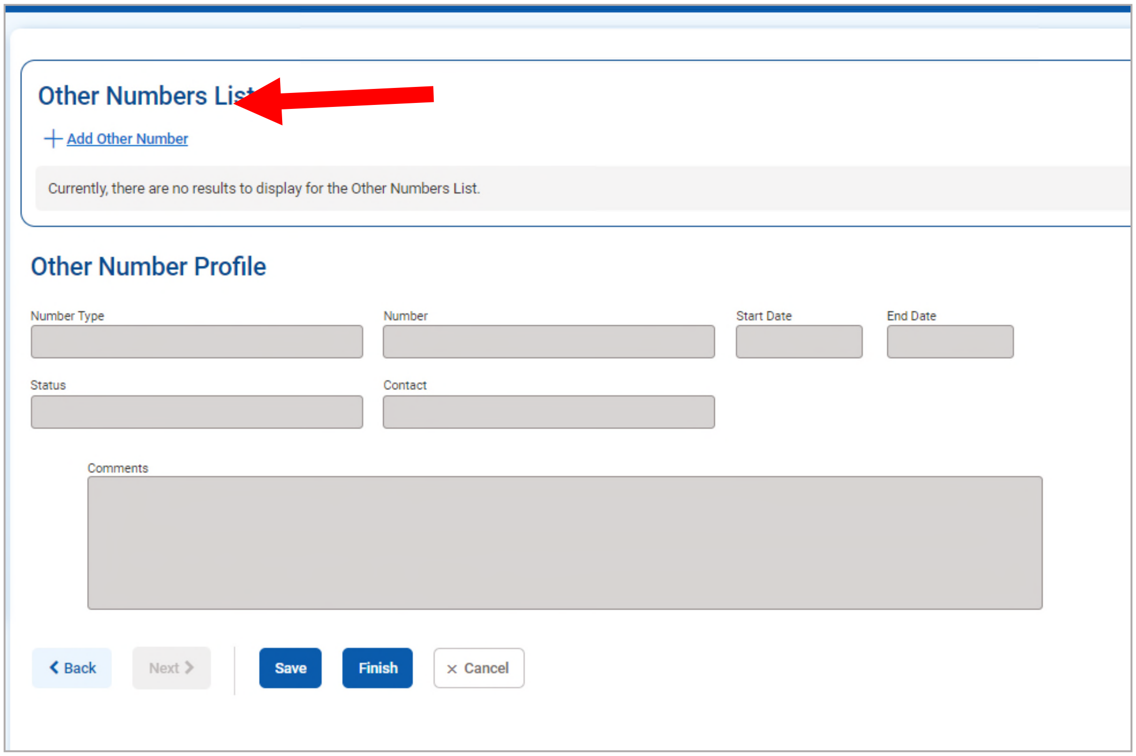


Figure 2-9: Other Numbers screen

3. The **Contact** dropdown box will display the names of any saved Collateral Contacts from the previous screen. If the name of the Collateral Contact is not present, click on the **Collateral Contacts** screen to add a new record.

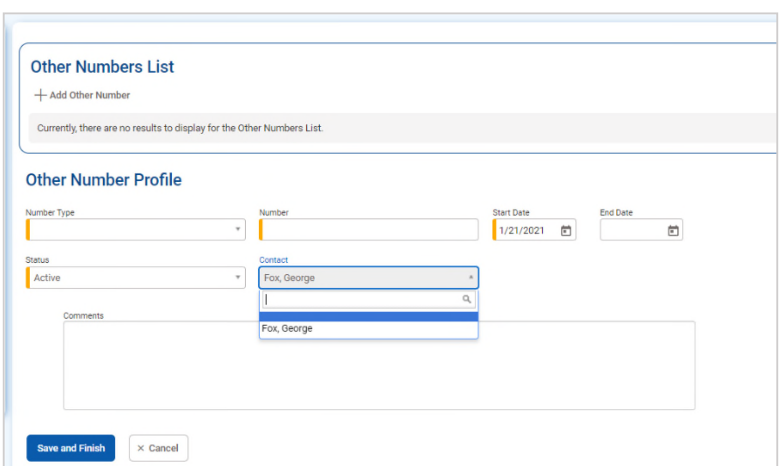


Figure 2-10: Other Numbers screen, saved collateral contact

4. When complete, click **Save and Finish**. The names now show up in the table on top of the screen.
5. Click **Finish** again, and you are redirected to the **Client Search** screen.

History

The **History** sub-menu displays a list of all changes that have been made to the client information as well as any access to this client's record. It lists the date, the staff person, and a description of the access or change.

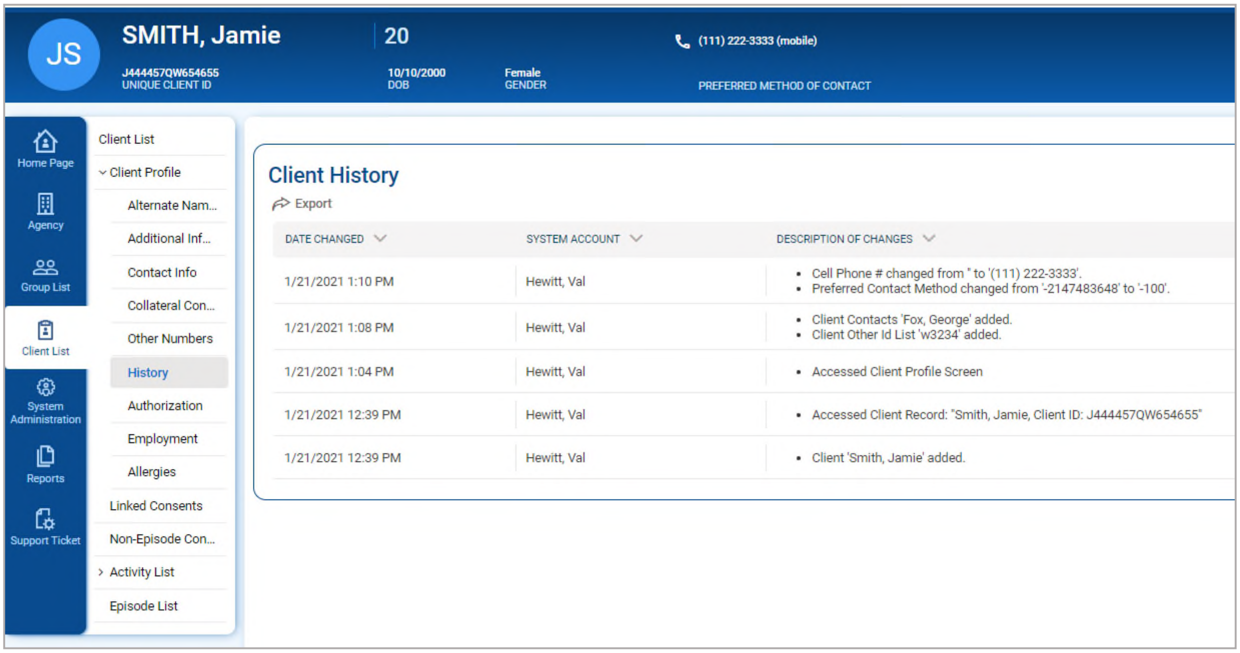


Figure 2-11: Client History screen

Part 3: Client Intake and Program Enrollment

Client Activity List

It is important to understand that data collection in WITS happens within a Client's Activity List. The Case, or Episode of Care, is the container that holds all client activities. The beginning and end of a client's Episode of Care are recorded on the Intake transaction, where the Intake Date starts the Episode and the Intake Date Closed marks the end of the Episode (these fields are shown in *Figure 3-5: Intake Case Information screen* on page 24).

The concept diagram below illustrates how this data collection is structured within the client Activity List. This Activity List is comprised of two (2) primary nested containers: Episode (e.g., Case, or Intake), and Program. The double lines connecting the Program container represent multiple program enrollments, which are allowed within a single Episode. In the diagram, arrows denote the sequence of progressing through each container.

When an Episode of Care ends for a client, this signifies that the client is no longer receiving services. It's possible for that client to return at a future date.

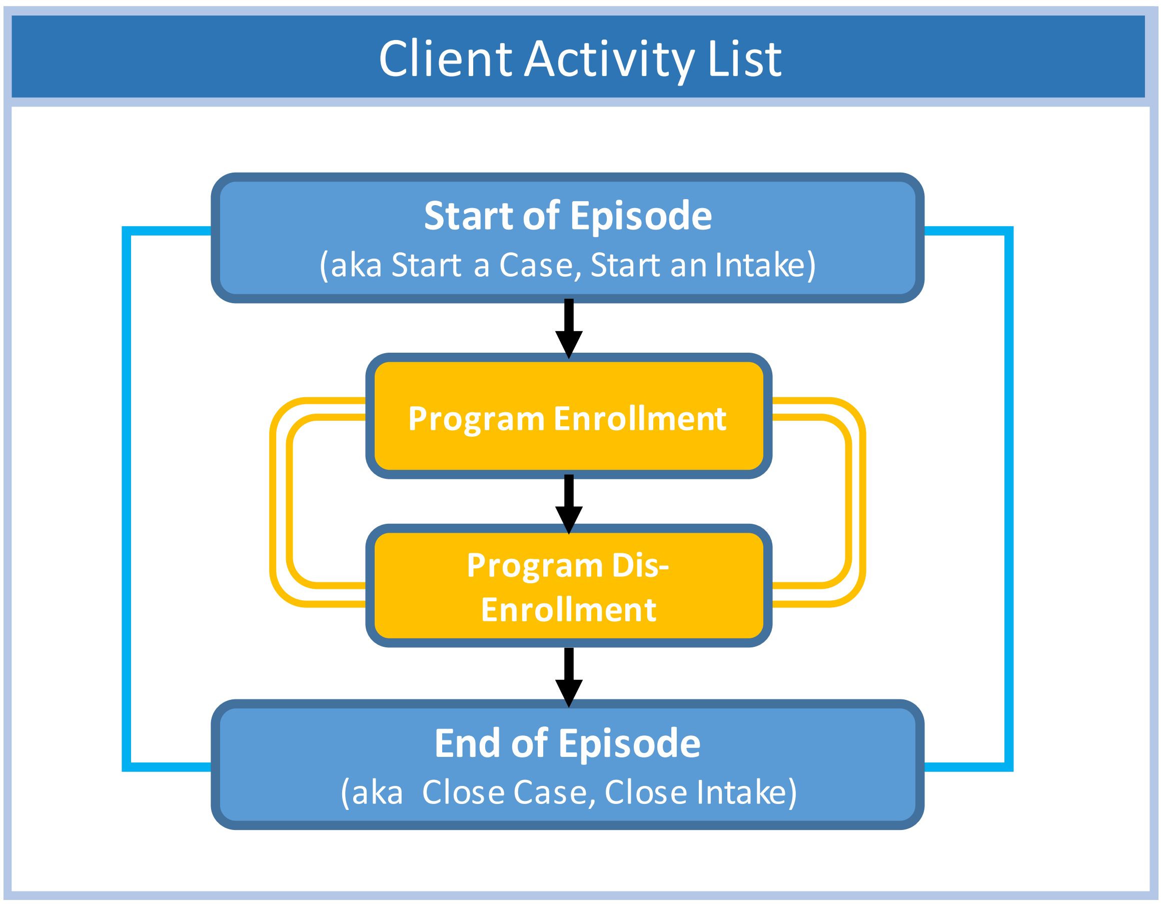


Figure 3-1: Concept Diagram of Data Collection Structure within Client Activity List

The **Client Activity List** can serve as a "dashboard' view for information that has been collected for a given client within an Episode. Each Activity on the Activity List has a status to help the end user determine if that activity is "Complete" or "In Progress". When an activity is "In Progress", a **Details** link is available which displays the information needed to complete the activity.

Certain client activities must be complete before you can proceed to a following activity. Validation rules will guide you throughout the workflow as you enter new data.

To access items within the Activity List, a client must be selected first.

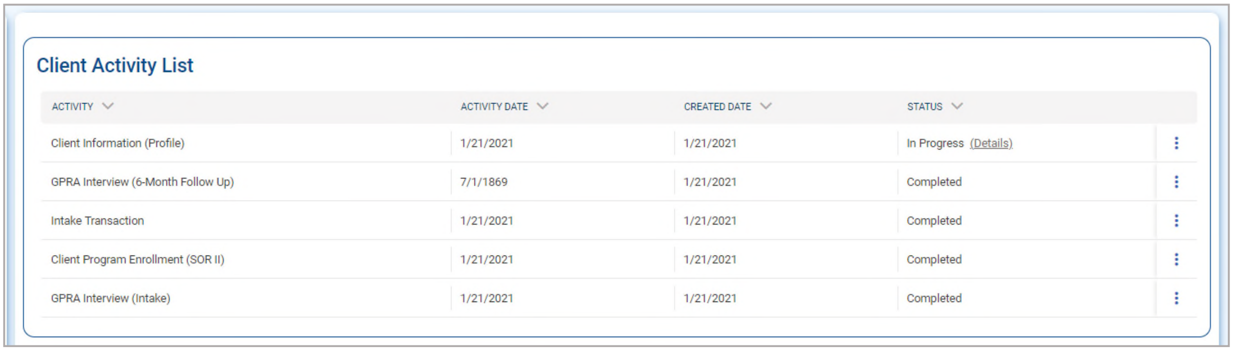


Figure 3-2: Client Activity List, Details link

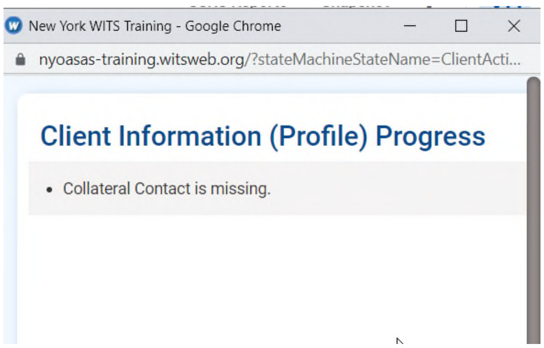


Figure 3-3: Details link, list of missing information

Some Client Activities do not have a concept of being complete. For those activities, the Status will be listed as Not Applicable.

Start New Episode (New Clients)

Where:* Client List > Activity List > *Episode List

In WITS, all items located in a client's Activity List are based upon an active Episode of Care. In the screen capture below, note the Activity List in the left menu only displays one item, "Episode List". An episode must be created before accessing other items in the client's Activity List.

To start a new episode of care for a client, follow the steps below.

1. On the left menu, click **Episode List**.
2. Click the **Start New Episode** link.

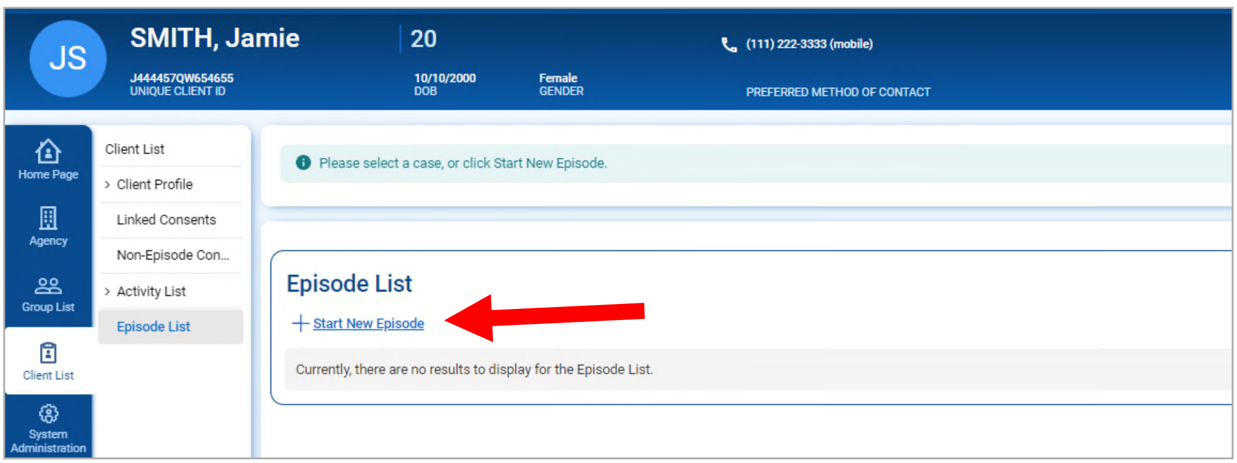


Figure 3-4: Episode List screen, Start New Episode link

If the client profile is complete, clicking **Start New Episode** will open the **Intake Case Information** screen, as shown in Figure 3-5: Intake Case Information screen.

(Continue to next section)

Intake

Where: Client List > Activity List > Intake

Once an episode of care has been created (see above section), complete the client's intake.

1. On the Intake Case Information screen, complete the fields as shown in the table below.

Table 3-1: Intake Case Information Fields

Field	Description
Intake Facility	Pre-populates with the current facility location.
Intake Staff	Pre-populates with the current staff member name.
Case Status	Defaults to "Open Active".
Initial Contact Date	The date when the Client first reached out for treatment.
Intake Date	Enter the client's intake date, (which also marks the beginning of the client's Episode). This field will default to today's date.
Residence	Select from the drop-down list.
Date Closed 	The Date Closed field is used to mark the end of the client's Episode.

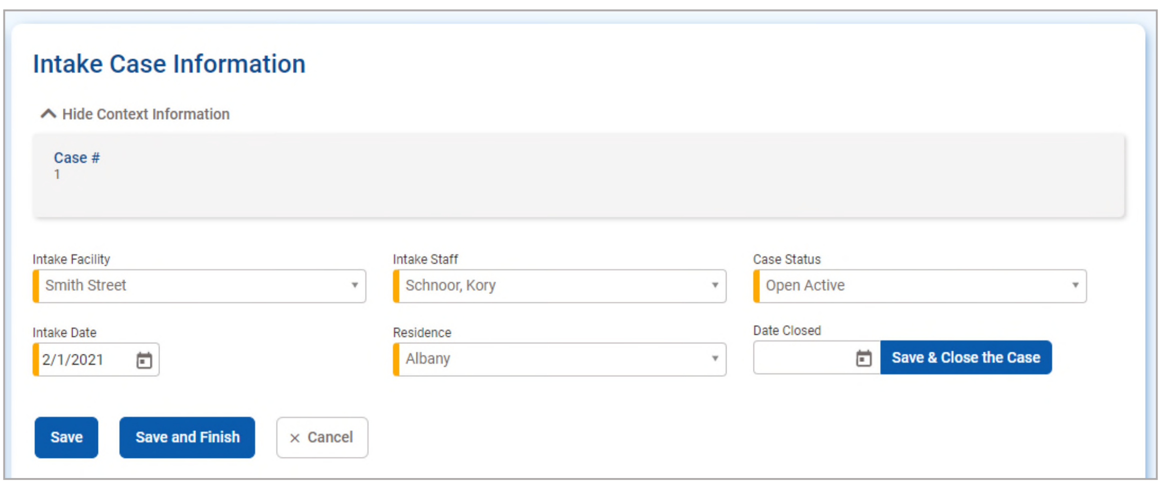


Figure 3-5: Intake Case Information screen

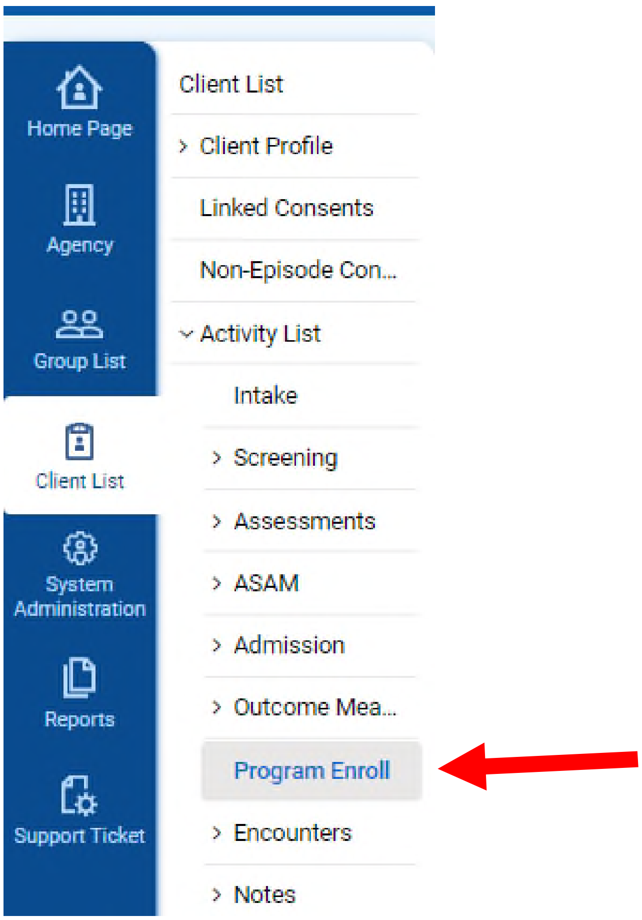
3. Click **Save and Finish**.

Program Enroll

Where:* *Client List > Activity List > Program Enroll

Once an Intake has been created (see above section), complete the client's program enrollment.

1. On the left menu, click **Program Enroll**.



2. Click the **Add Enrollment** link.

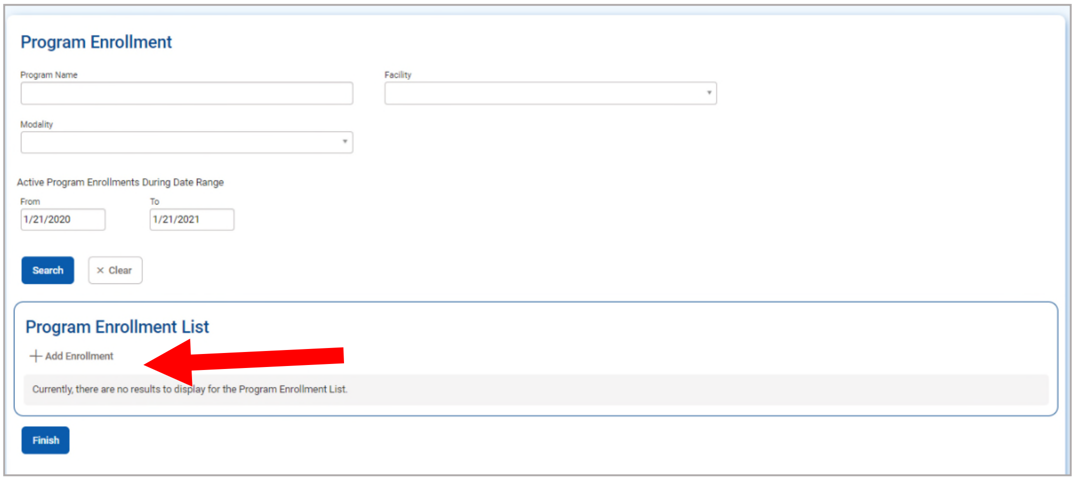


Figure 3-6: Program Enrollment screen

3. Complete fields on the Program Enrollment Profile.

Table 3-2: Program Enrollment Profile fields

Field	Description
Facility	Defaults to the current Facility name.
Program Name	Select the appropriate program for the client
Program Staff	Pre-populates with the current staff member name.
Start Date	Defaults to the current date.
Days on Wait List (TEDS Only)	Type the number of days.
Notes	Type any notes as needed.

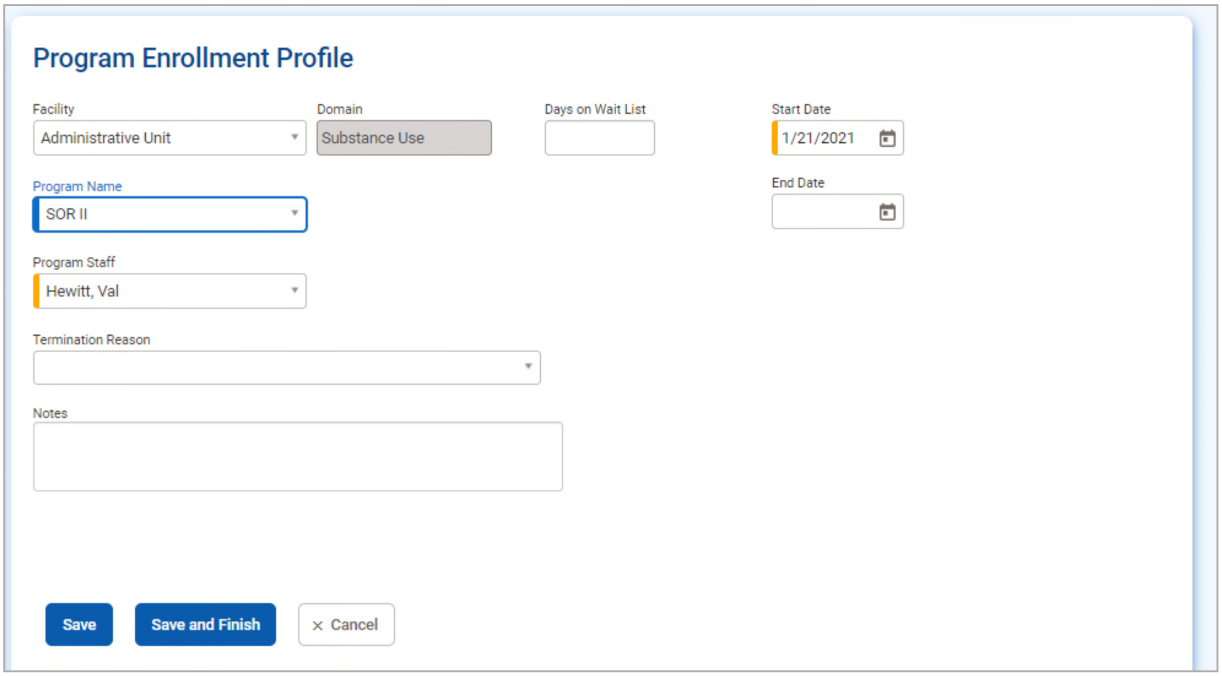


Figure 3-7: Program Enrollment Profile screen

4. Click **Save and Finish**.
5. On the Program Enrollment screen, click **Finish**.

Part 4: GPRA Interviews

***Where:* Client List > Activity List > GPRA**

To access the GPRA section in WITS, select a client from the Client List and then view the client's Activity List. The GPRA section displays a list of previously entered GPRA interviews (at that agency) and includes link(s) to add a new interview record. For previously entered GPRA interviews, available actions include, View, Edit, and Delete, which are described below in *Table 4-1: Available Actions for GPRA Interviews*.

Important: The GPRA menu item will only appear if:

1. The staff member completing the GPRA interview has been assigned the following role, "GPRA (Full Access)" or Grant Data Entry (Full) ". This role is assigned by your WITS or agency administrator.
2. The GPRA interview is being done for a client who is enrolled in a WITS program associated with the SOR II grant. Your WITS administrator should advise you as to which of your agencies' programs are associated with the SOR II grant.

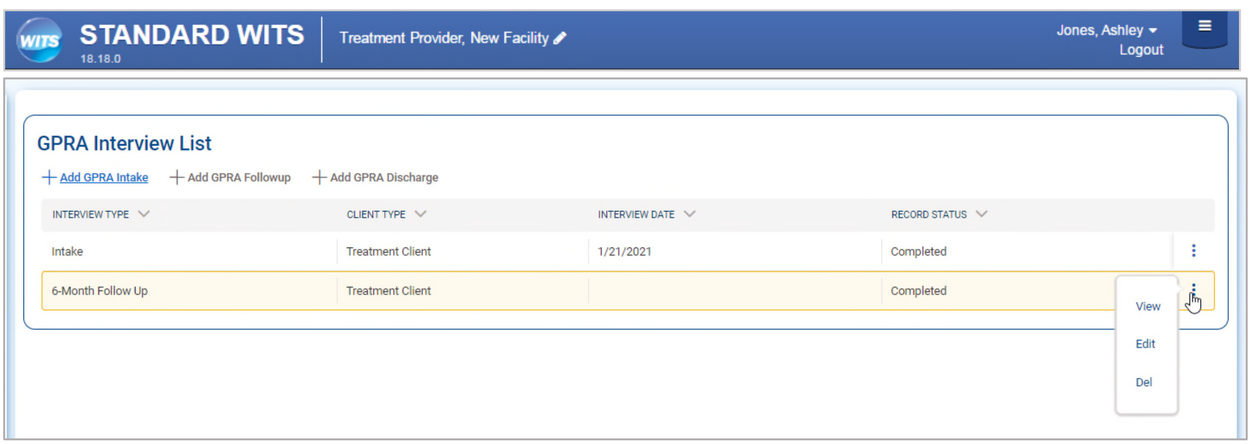
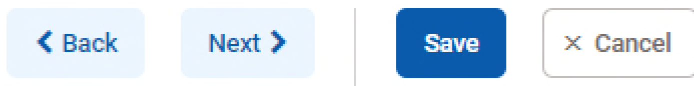
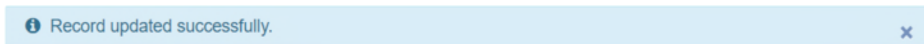
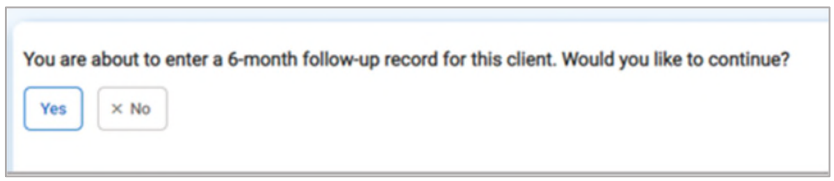
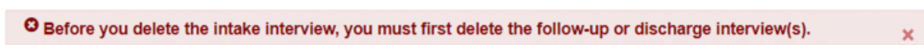


Figure 4-1: GPRA Menu displaying previously entered GPRA Interviews with Actions

Tip: Depending on the existing interview record(s), the choice of adding a GPRA Follow up or a GPRA Discharge is available. The first GPRA Interview that can be added is the GPRA Intake.

Table 4-1: Available Actions for GPRA Interviews

Action	Description
View	Opens the interview in read-only mode.

Action	Description
Edit	Opens the interview in edit mode, where certain fields can be updated. A Save button is available on screen, and when clicked, an information message will appear stating that the record has been successfully updated.  
Delete	A confirmation screen will appear, prompting the user to select 'Yes' or 'No' to continue with deleting the record.  If a client has follow-up or discharge interview(s), those interviews must be deleted before the intake interview can be deleted. 

Completing Interviews

Action Buttons

The Back and Next buttons give the user the ability to move to the previous and next page of the GPRA. The **Save** button will save the progress of the user. **Cancel** will cancel adding the GPRA interview. Users progress through the interview by completing the required fields on screen and then clicking the **Next** button to move to the next set of questions. Each field must be completed before moving to the next screen.

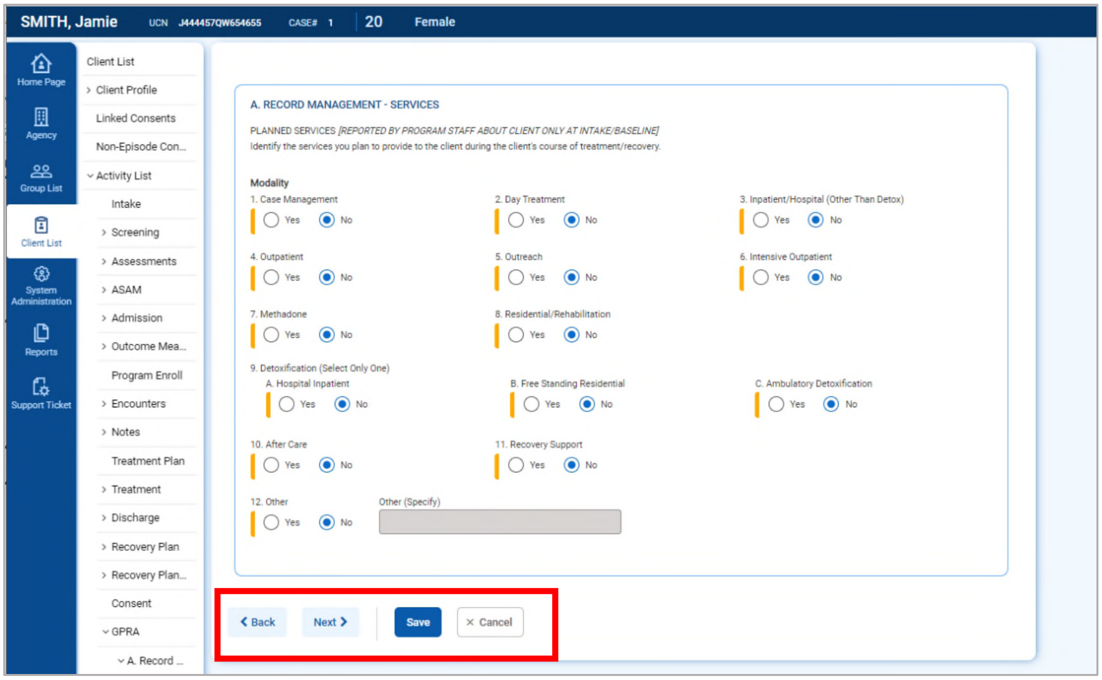


Figure 4-2: GPRA Interview Back, and Next Buttons

Automation (Skip Logic)

Based on the client's response to certain questions, the screen will update causing some questions to become required and/or automatically filled in as read-only fields. For example, if the client has not served in the military (answered "No" to Section A Question 5), the system will automatically fill in the other military questions with "Not Applicable".

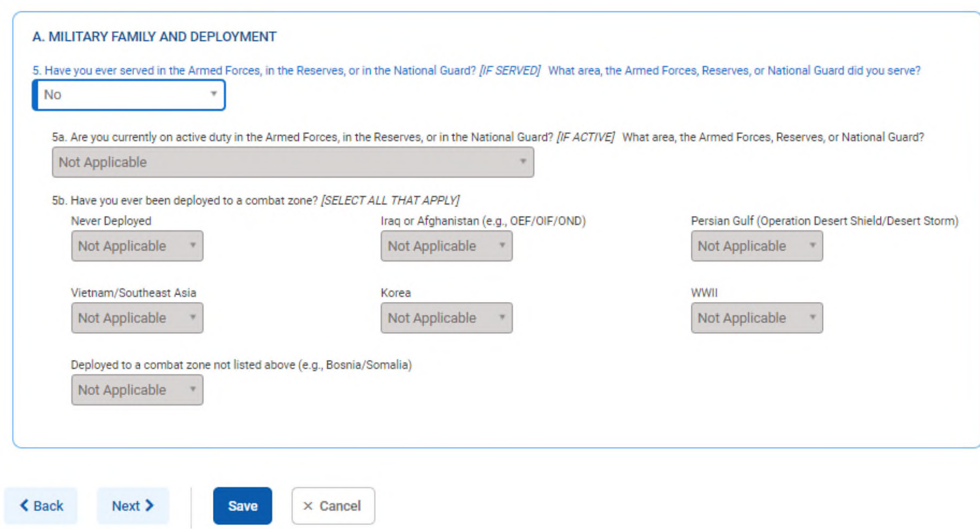


Figure 4-3: GPRA Interview, Automation (skip logic) example

Answers Reviewed

Answers to some questions are also checked with responses given in subsequent sections. For example, the value in field B.1.d (used both alcohol and drugs (on the same day) should not exceed value in B.1.c (used illegal drugs).

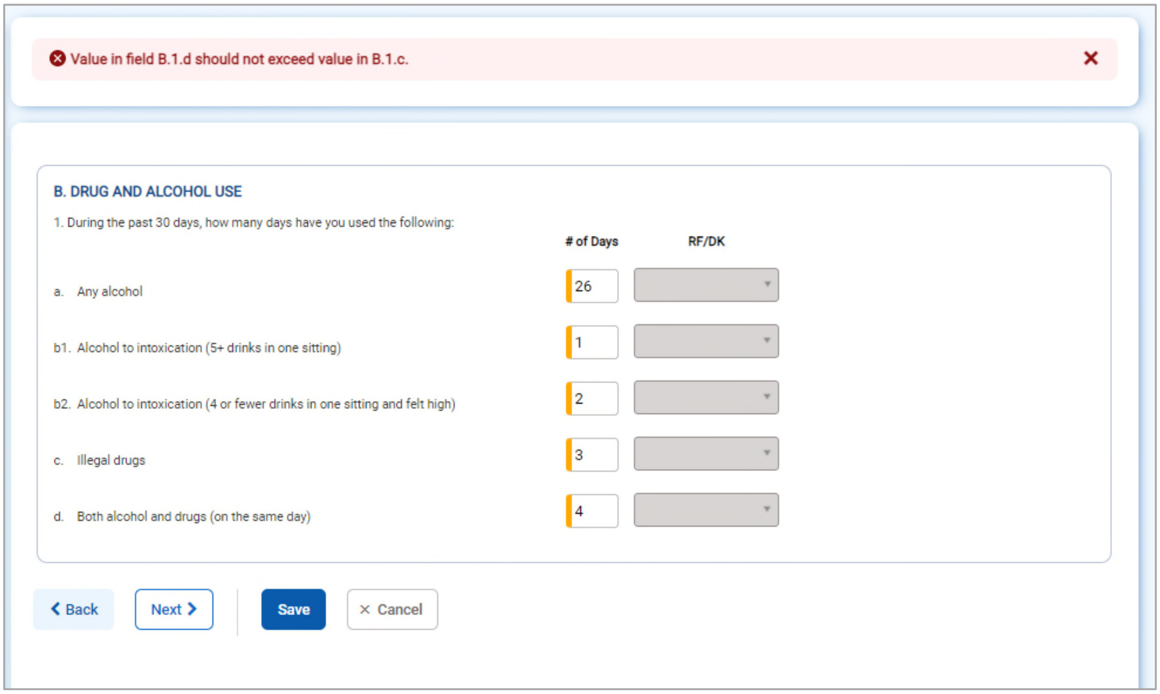


Figure 4-4: Reviewed Answers Example (Section B.), Number of days used alcohol and drugs

You reported that you have used illegal drugs during the past 30 days (B.1.c), then E4 (how many times have you committed a crime) should be no less than B.1.c, since taking illegal drugs is a crime. Do you wish to continue?

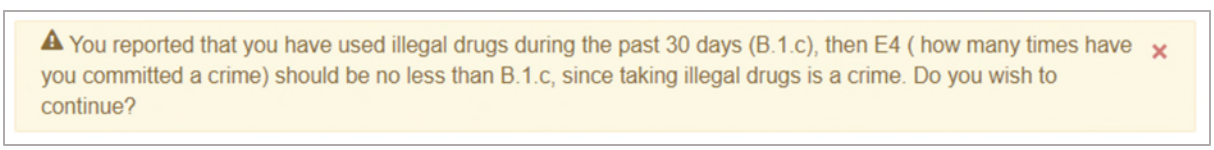


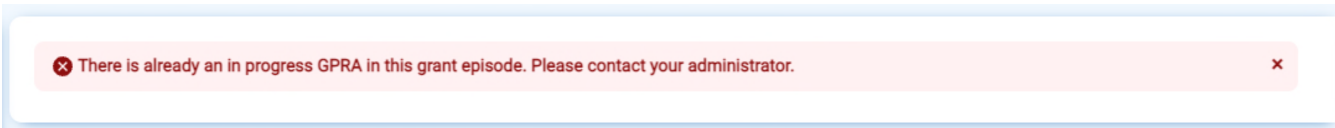
Figure 4-5: Reviewed Answers Example (Section E.), Used illegal drugs

Entry for Question B.3 should be 'YES' if the Route for any substance is 'Non-IV Injection' or 'IV'.

GPRA Intake Interview

***Where:* Client List > Activity List > GPRA > GPRA Intake**

Follow the steps below to add a GPRA Intake Interview. If, when you go to record the GPRA, you receive a message that says that there is already a GPRA in progress:



This means that the client has received services from another agency that is using WITS to track GPRA data.

Ask the client if they remember which agency they were at before, and if they know the agency information the two agencies for which the client is registered should coordinate efforts. **The first agency will need to create a Consent and Referral in WITS to send the client to the second agency**. (See the Section in this guide on Consent and Referral) That would then automatically create the Client Profile in the second agency. In order to not violate HIPAA, the staff member can ask the client and/or the first agency that he or she was registered with.

If the providers cannot coordinate on their own, or if the client does not know the other agency where they previously had an episode, then contact your WITS administrator to coordinate the process.

1. To access the GPRA interview, select a client from the **Client List**, hover over the ellipsis the Actions column, and then click **Activity List**.

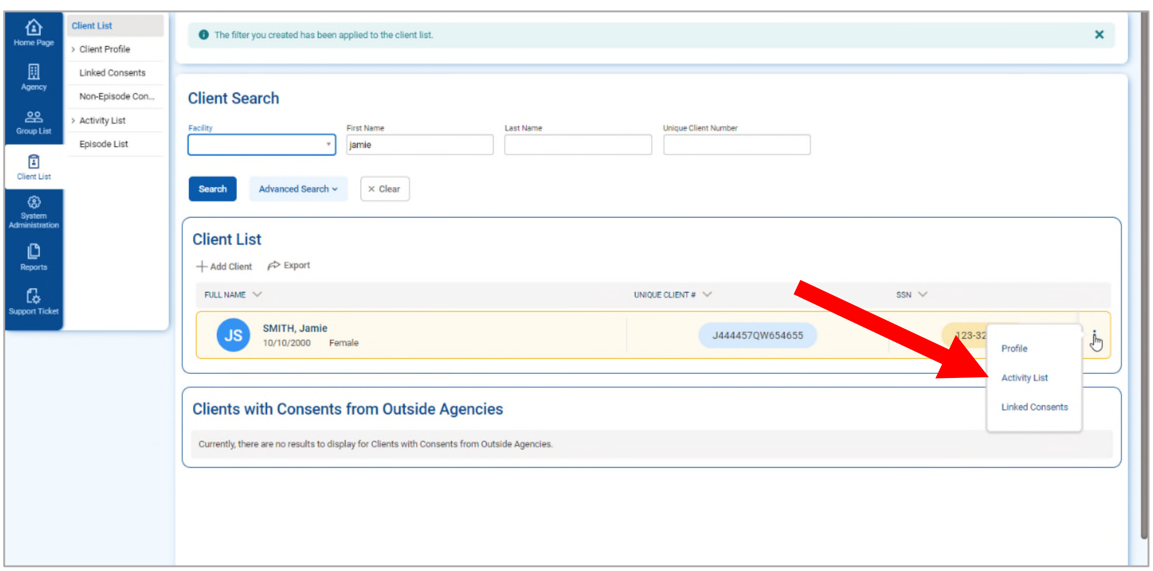


Figure 4-6: Access Activity List

2. On the left menu, click **GPRA**.

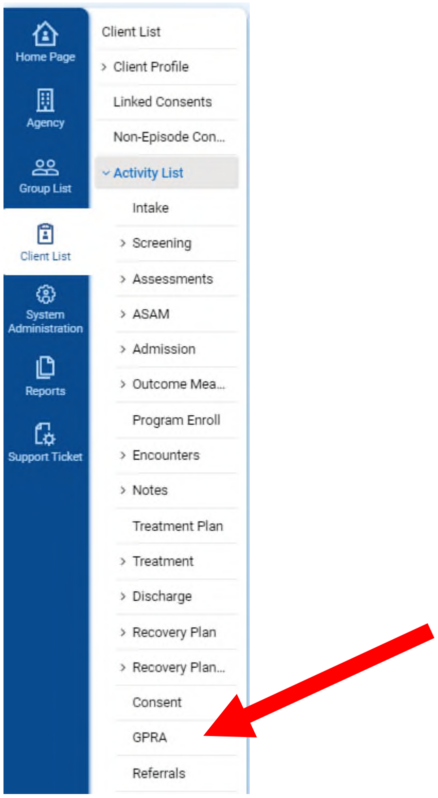


Figure 4-7: Access the GPRA Screen

3. On the GPRA List screen, click **Add GPRA Intake**.

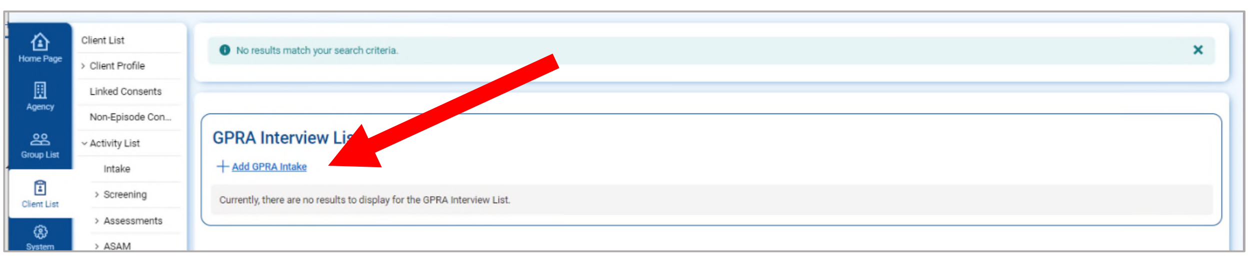


Figure 4-8: Add GPRA Intake

4. The system will display the first of several GPRA Interview screens. Complete the required fields.

Note: The 'Interview Date' must be greater than or equal to client intake date.

The ‘Interview Date’ must occur during the active period of the selected Program Enrollment (MM/DD/YYYY).

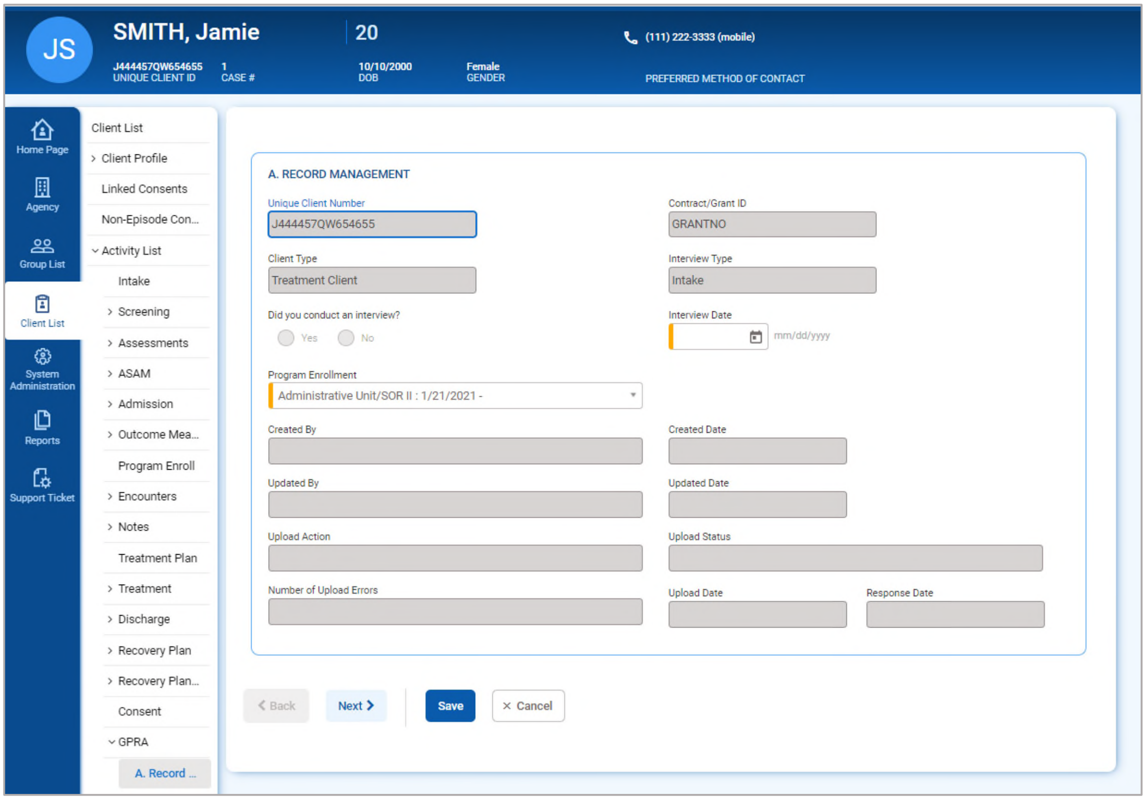


Figure 4-9: GPRA Intake, Record Management section

5. Click the **Next Button** to move to the next GPRA section.

6. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.

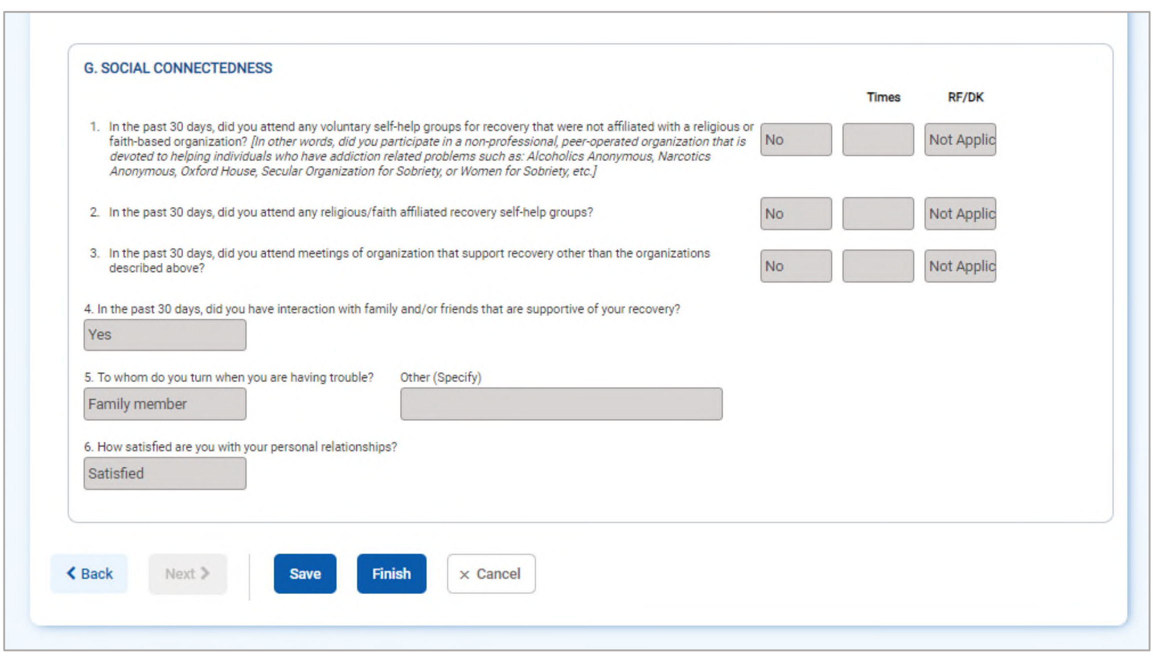


Figure 4-10: Intake Interview, Summary Screen

GPRA Interview Compliance Details

Grant Requirement

A GPRA Follow-up Interview must be completed with the client 6 months after the GPRA Intake Interview. There is a 3-month window to enter that follow-up interview in WITS and be in compliance with the grant program's requirement. The compliance window opens 5 months after the GPRA Intake Interview and ends 8 months after the GPRA Intake Interview.

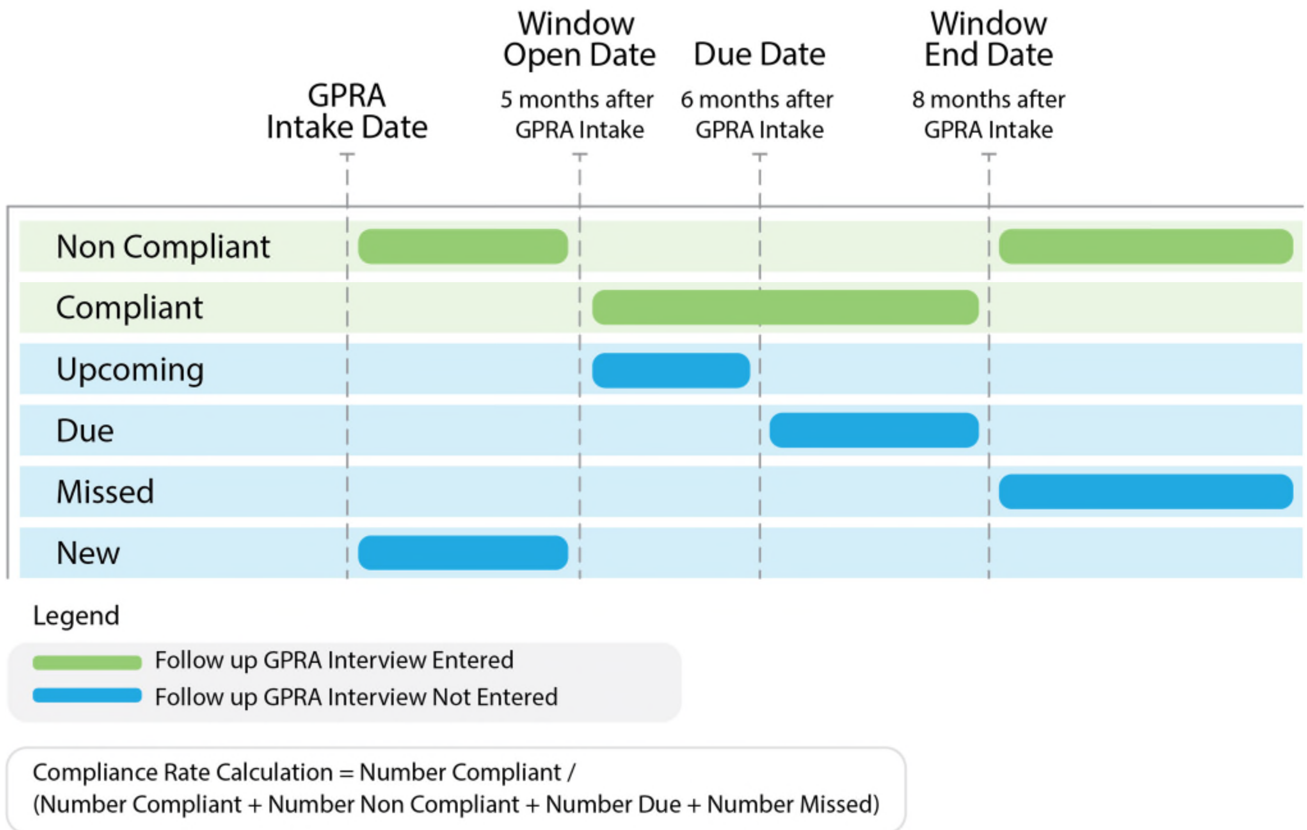


Figure 4-11: GPRA Follow-up Due Diagram

Definitions for each follow-up status are included in the following table.

Table 4-2: Follow up Attendance Definitions

Term	Meaning
Compliant	GPRA Follow-up Interviews **entered** into WITS **during** the compliance window specified above are considered compliant. The GPRA follow up interview must be conducted (Was the GPRA interview conducted = Yes) and the interview date must be within the window.
Non-Compliant	GPRA Follow-up Interviews **entered** into WITS **outside** of the compliance window specified above are considered non-compliant. This count also includes GPRA Follow-up records that are entered in the system but were not conducted (with no interview date, Was the GPRA interview conducted = No).
Upcoming	Clients with no follow-up interview who have a GPRA intake Interview dated between 5 and 6 months ago (for 6-month follow up) are part of the **Upcoming** count.

Term	Meaning
Due	Corresponds to the number of clients who have reached the due date (6 months) and do not yet have a GPRA Follow-up Interview record in WITS. This count does not consider the clients who have a corresponding GPRA Discharge Interview with a termination of "Death, Unknown" and "Death, Cause known". This would cover a scenario where a client died before the follow-up became due.
Missed	The clients who do not have a GPRA Follow-up Interview entered into WITS after the end of the window are a part of the **Missed** count.
New	The Clients who have a GPRA intake Interview, no GPRA Follow-up Interview, and who have not entered in a follow up window yet, are a part of the **New** count.

GPRA Follow-up Due Summary Screen

Where:* Agency > *GPRA Follow-up Due Summary

The **GPRA Follow-up Due Summary** screen displays a summary view of where an agency stands with their follow up interviews and includes the agency's compliance rate. Users can select from the available search fields and click **Go** to view the search results. Information on these search fields are listed in the table below.

The search results will display a distinct count of GPRA interviews for each follow-up status available at the time of searching. For definitions of each status, see *Table 4-2: Follow up Attendance Definitions* on page 35 above.

Table 4-3: GPRA Follow-up Due Summary Screen Search Filters

Field	Description
Agency Type	In the **Agency Type** search field, the option "**Intake**" represents the agency where the GPRA Intake Interview was conducted. The option, "**Follow-up**" represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be a drop down where the SOR II grant can be selected.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles under System Roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.

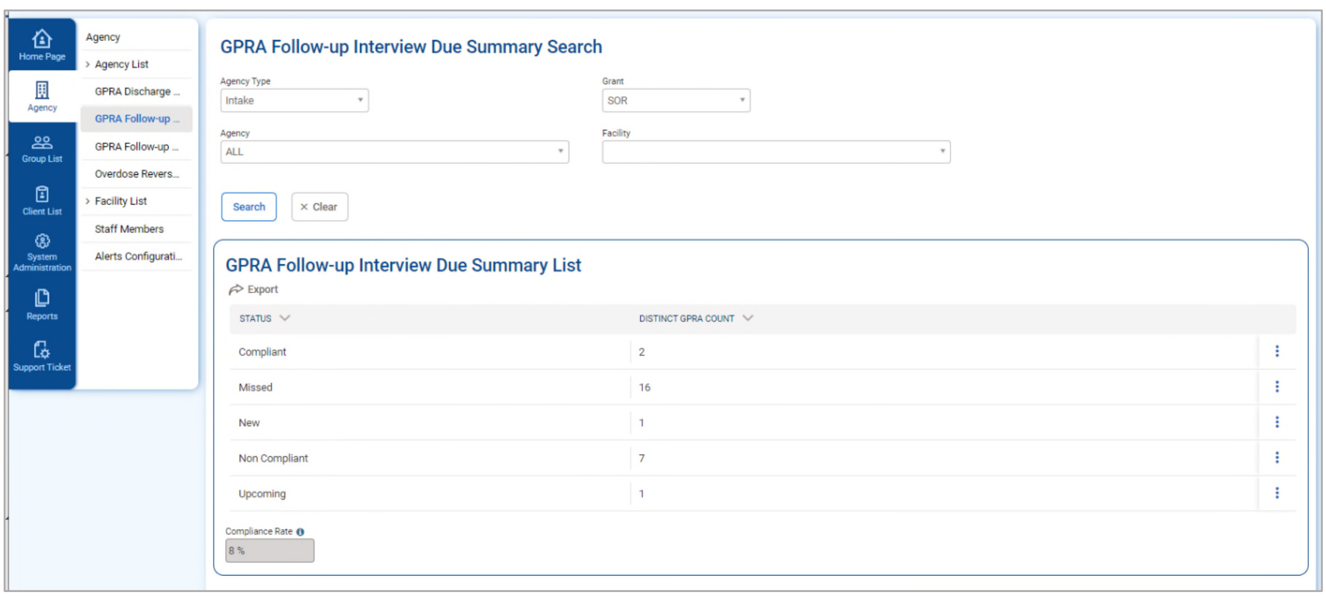


Figure 4-12: GPRA Follow-up Due Summary screen

Detailed information for each interview status can be seen by hovering over ellipsis icon in the Actions column, then clicking **Details**. The system will then redirect to the GPRA Follow-up Due Detail screen, displaying the associated client records for the selected interview status and the current search criteria. The GPRA Follow-up Due Detail screen is covered in the next section.

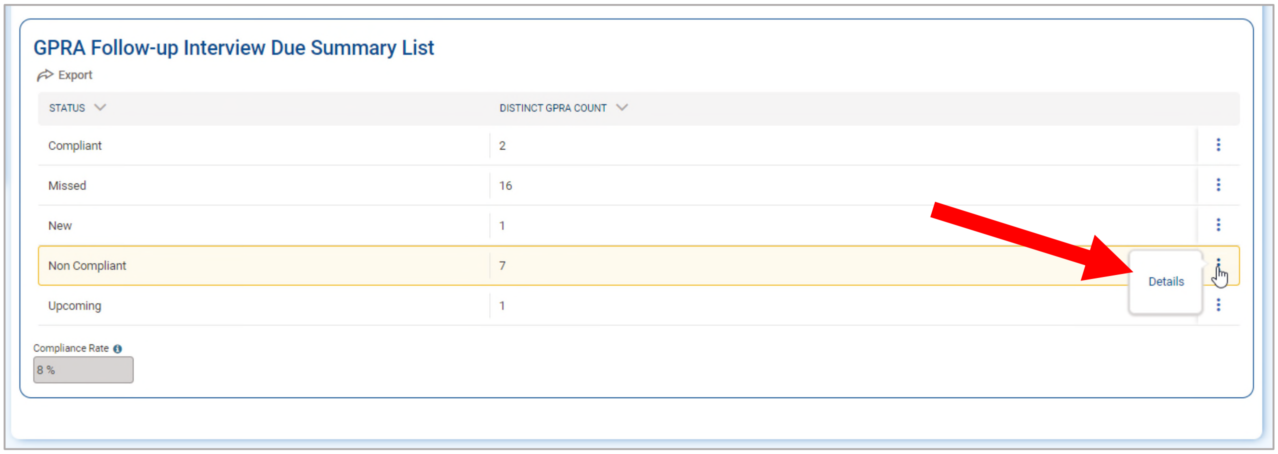


Figure 4-13: GPRA Follow-up Interview Status List, Details link

GPRA Follow-up Due Detail Screen

Where: Agency > GPRA Follow-up Due Detail

The **GPRA Follow-up Due Detail** screen displays a list of client records with information regarding the clients' GPRA interview status. Staff members can use the available search fields and click **Go** to view the results.

Table 4-4: GPRA Follow-up Due Detail Screen Search Filters

Field	Description
Agency Type	In the **Agency Type** search field, the option "**Intake**" represents the agency where the GPRA Intake Interview was conducted. The option, "**Follow-up**" represents any agency where the GPRA follow-up interview can be conducted.
Grant	This required field will be a drop down where the SOR II grant can be selected.
Agency	For users with access to only one agency, this field will default to that agency's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the agencies. If the user has an agency oversight role to specific agencies, then this field will display those specific agencies plus the staff member home agency.
Facility	For users with access to only one facility, this field will default to that facility's name. If the user has **View GPRA Follow Up Compliance** and **All Agency Access** roles, then this field will display all the facility names. If the user has an agency oversight role to specific agencies, then this field will display those specific facilities plus the staff member home agency's facilities.
Status	The **Status** search field will filter the list of clients corresponding to a specific compliance status. For definitions of each status, see *Table 4-2: Follow up Attendance Definitions* on page 35 above.

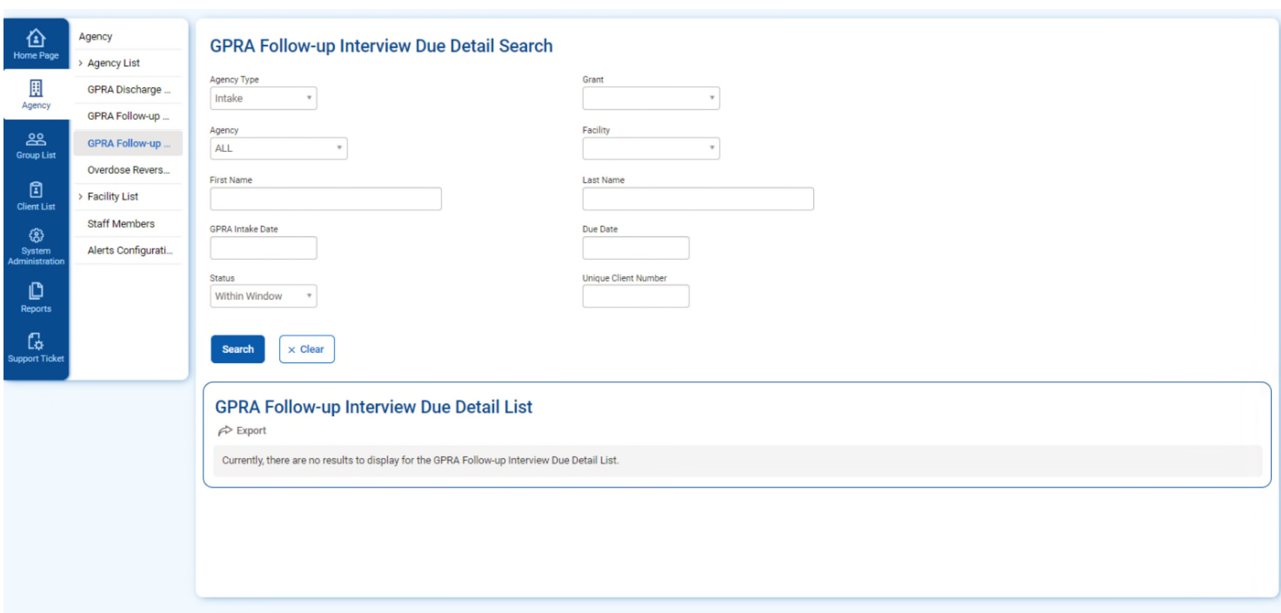


Figure 4-14: GPRA Follow-up Due Detail screen

If the staff member was redirected to this screen by clicking the "**Details**" link on the GPRA Follow-up Due Summary screen, the Agency Type, Agency, Facility and Grant, search fields and Status will be prepopulated with the options entered on the Summary screen. The following informational message will also be displayed, *"The records on this list may not match the total from the summary because you may not have access to some clients."*

Note: Since the GPRA Follow-up Due Detail screen includes client names, the search results displayed in the list are filtered to only include clients that the staff member has access to.

The records on this list may not match the total from the summary because you may not have access to some clients.

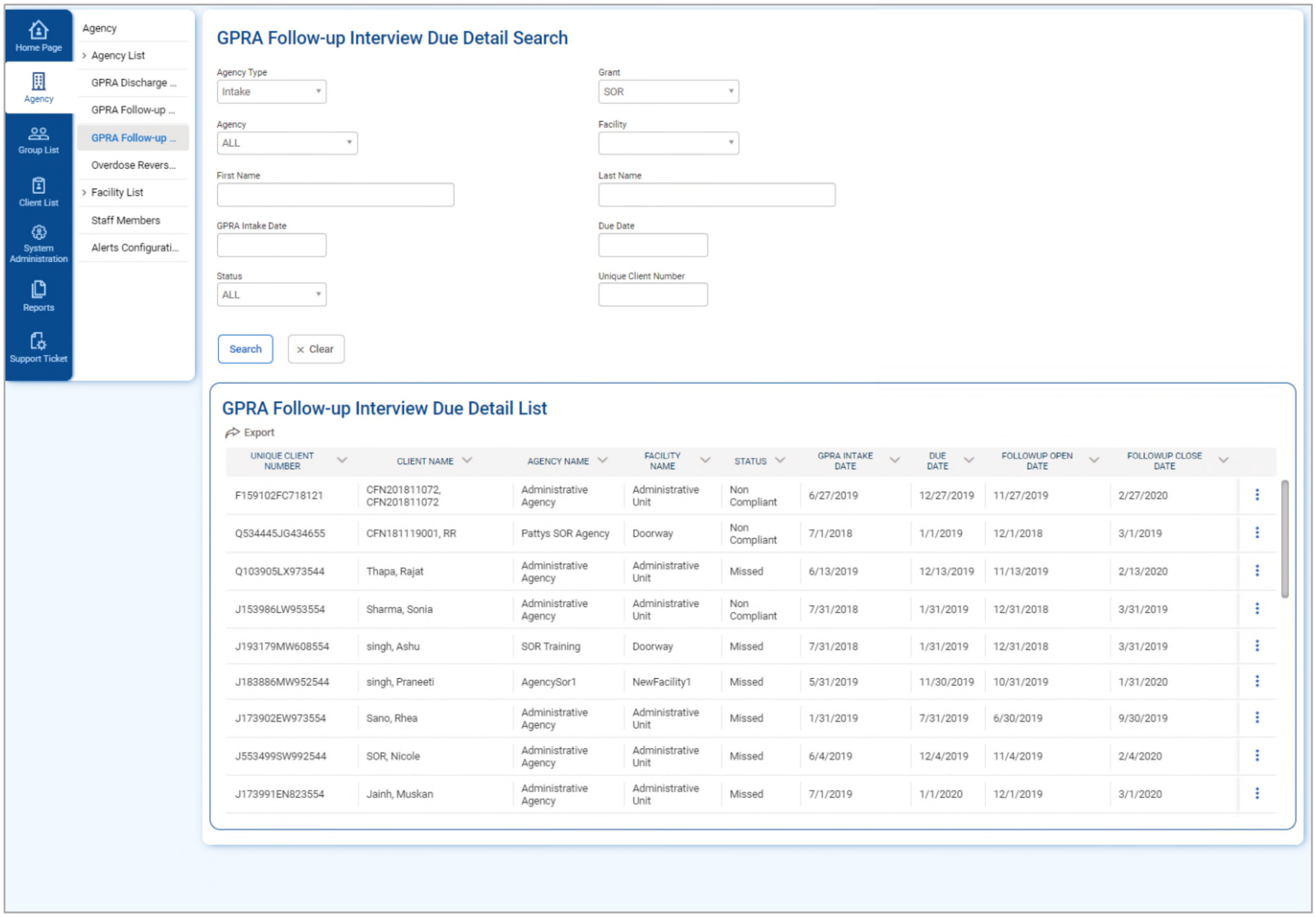


Figure 4-15: GPRA Follow-up Due Screen, pre-populated based on Summary screen selections

In the **Actions** column, clicking the "**View**" link will redirect to the client's GPRA list screen if the staff member is currently in the same context agency as the client. If the staff members' context agency is different than the client, clicking the "View" link will display the following error message, *"This client does not exist in the context agency. Please change your context agency to view the client."*

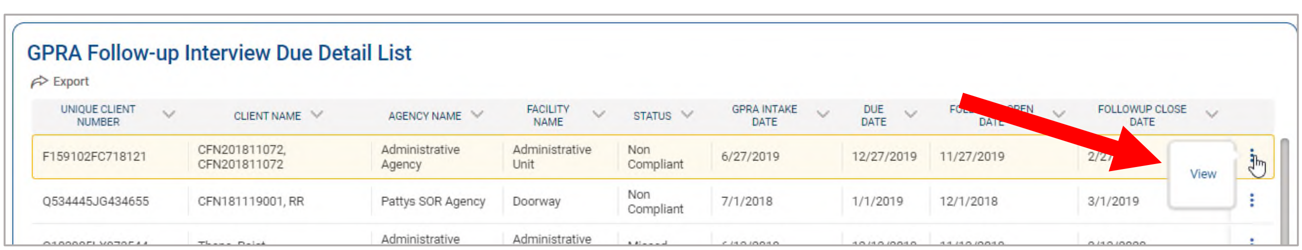


Figure 4-16: GPRA Follow-up Due Detail, View link

Note: If you have access to multiple agencies, make sure you're in the correct context agency to view the client record. Otherwise, the following error message will be displayed.

"This client does not exist in the context agency. Please change your context agency to view the client."

GPRA Follow-up Interview

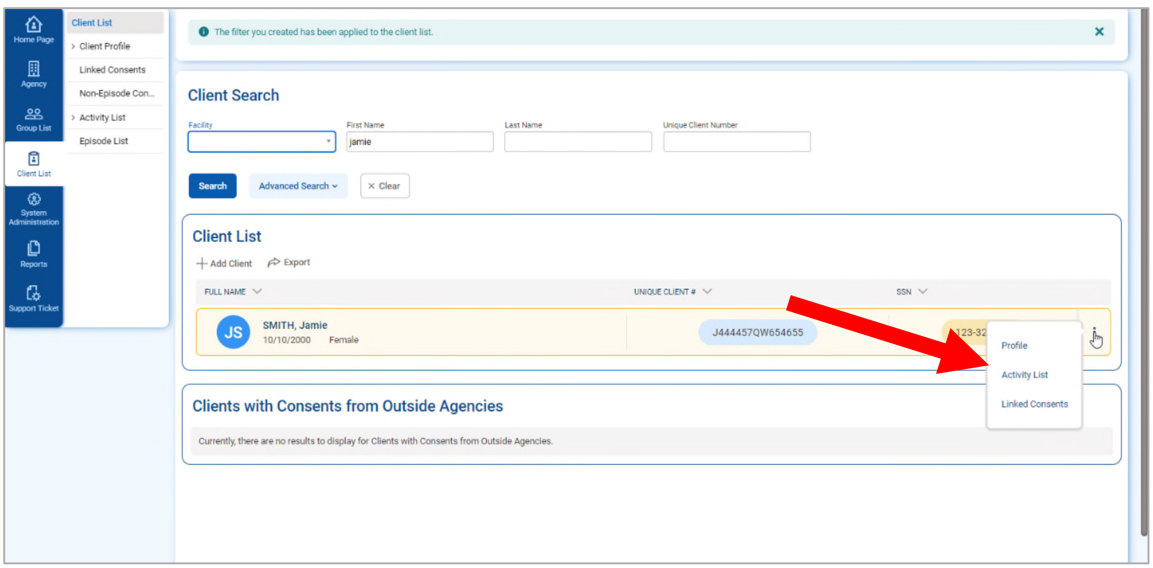
Where:* *Client List* > *Activity List* > *GPRA* > *GPRA Follow-up

GPRA Follow-up Interviews should be added 5 to 8 months after a client's GPRA Intake Interview date. Follow-up GPRA Interviews include additional questions to record the follow-up status. To add a follow-up record, follow the steps below.

Note: If a follow-up interview has been conducted, **sections B through G** and **I** must be completed.

If the follow-up interview has ***not*** been conducted, **section I** must be completed.

1. To access the GPRA interview, select a client from the **Client List**, point to the ellipsisicon in the Actions column, and then click **Activity List**.



2. On the left menu, click **GPRA**.
3. On the GPRA List screen click **Add GPRA Follow-up**.

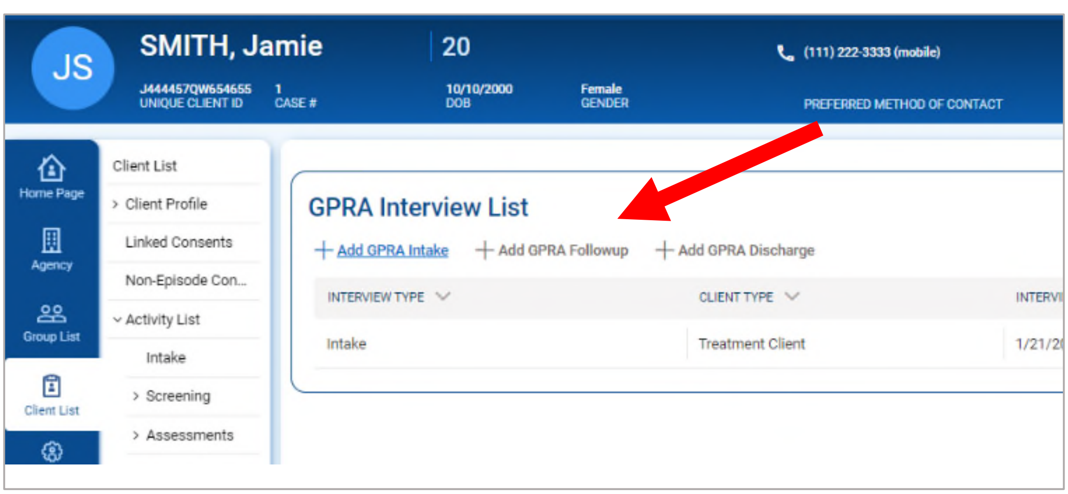


Figure 4-17: GPRA list, Add GPRA Follow-up link

4. The system will display a confirmation screen stating, “You are about to enter a 6-month follow-up record for this client. Would you like to continue?” Select **Yes** to start the follow-up interview.

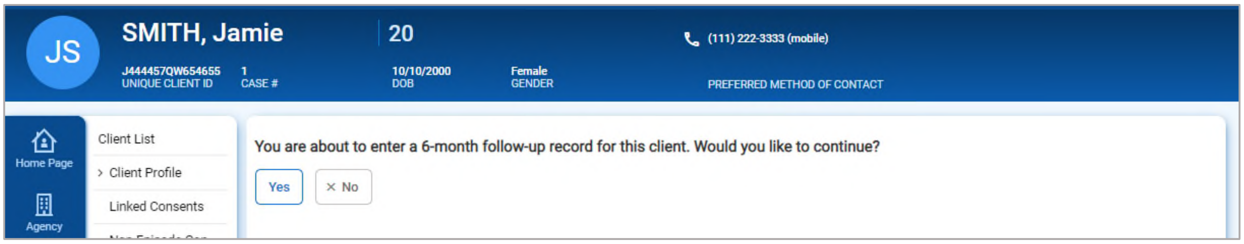
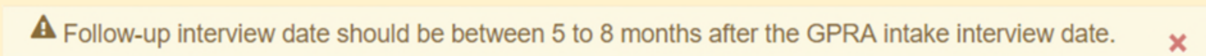
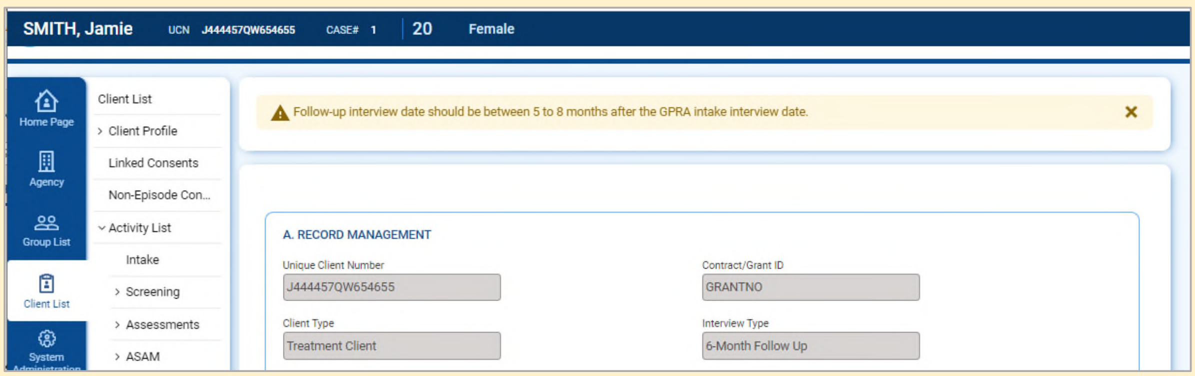


Figure 4-18: Follow-up interview confirmation screen

Note: The system will display a warning message if the Follow-up Interview Date is not within 5 to 8 months after the GPRA Intake Interview date. This message will also be displayed on the GPRA list screen.





5. When the interview opens, complete the required fields and click the **Next** button to progress to the next screen. If the interview was not conducted (answered “No” to the question “Did you conduct an interview?”), clicking the Next button will display Section I. Follow-up Status.

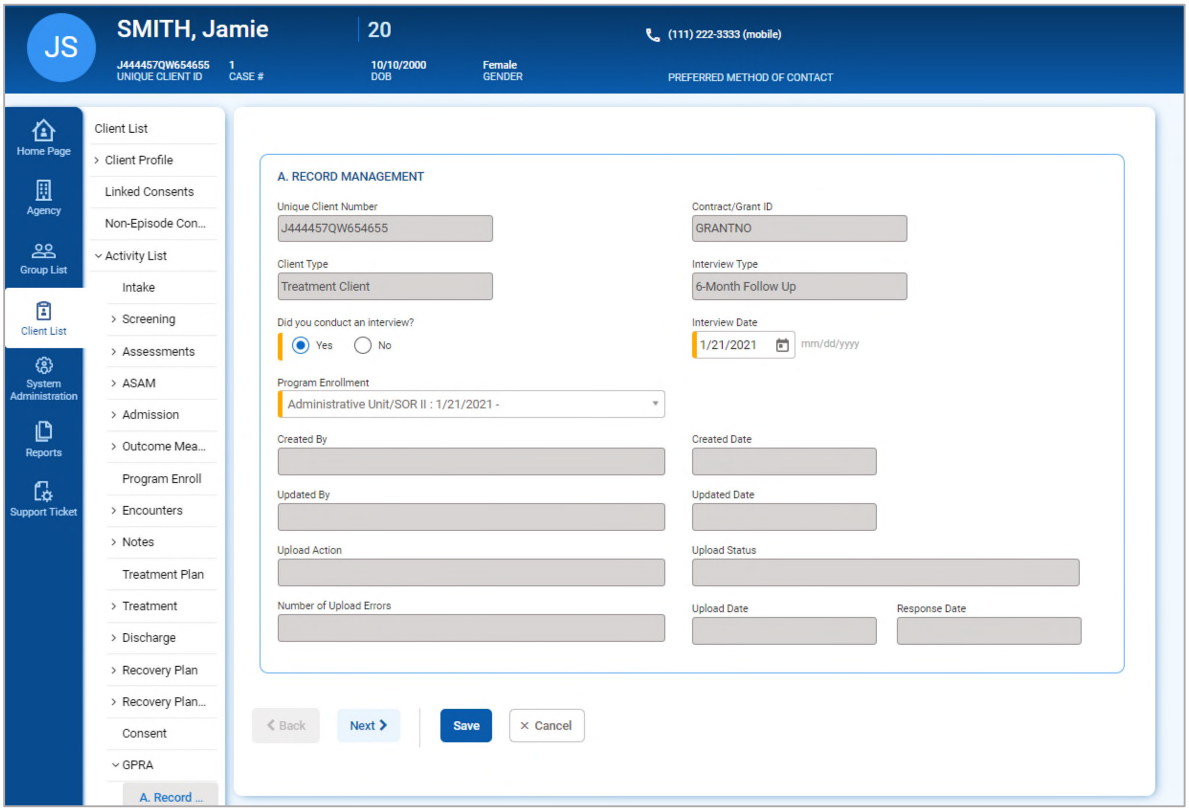


Figure 4-19: GPRA Follow-up, Section A. Record Management

6. In **Section A. Record Management - Behavioral Health Diagnoses**, if the client had medications selected on their encounter(s) within the grant episode, and the user answers "**Yes**" to questions 1a or 2a, then medication information will be prepopulated on screen. Users can modify this prepopulated information as needed.

Note: Encounters may have been entered in other agencies than yours.

The Received field will be set to "Yes" for each medication listed on the encounter(s), and "No" to all other medications. For each drug received, the number of days will be set based on the encounter(s) of the client's grant episode, and when the encounter service start date or end date were 30 days or less from the GPRA interview date. If more than one drug was selected on an encounter, then the same number of days for each drug on the GPRA discharge and Follow ups will be set. The number of days is based on encounter service start date/end date. If the encounter has no end date, it will be counted as one day. If multiple encounters are entered on the same day, then it counts 1 day per medication.

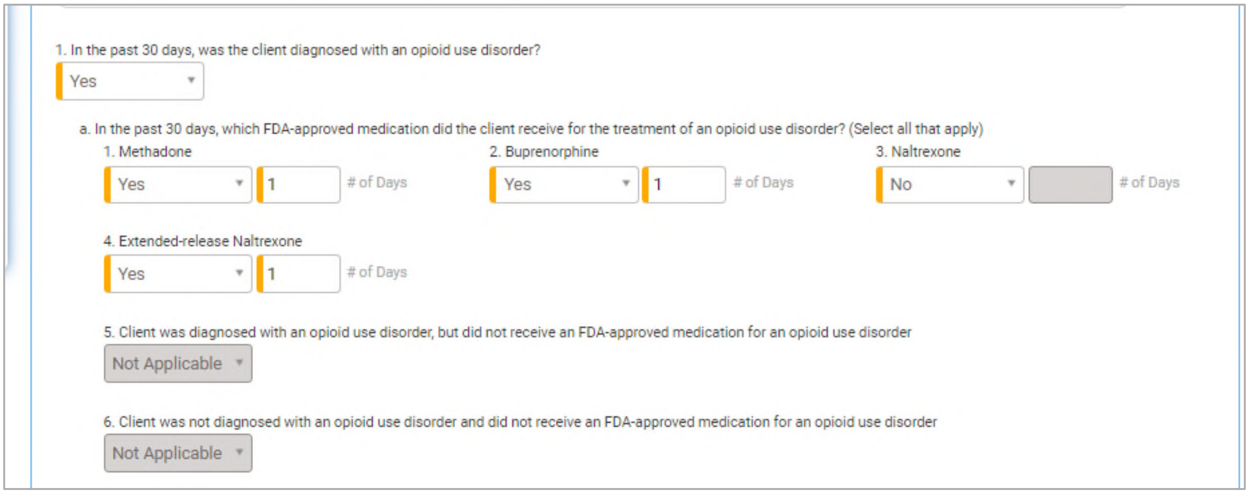
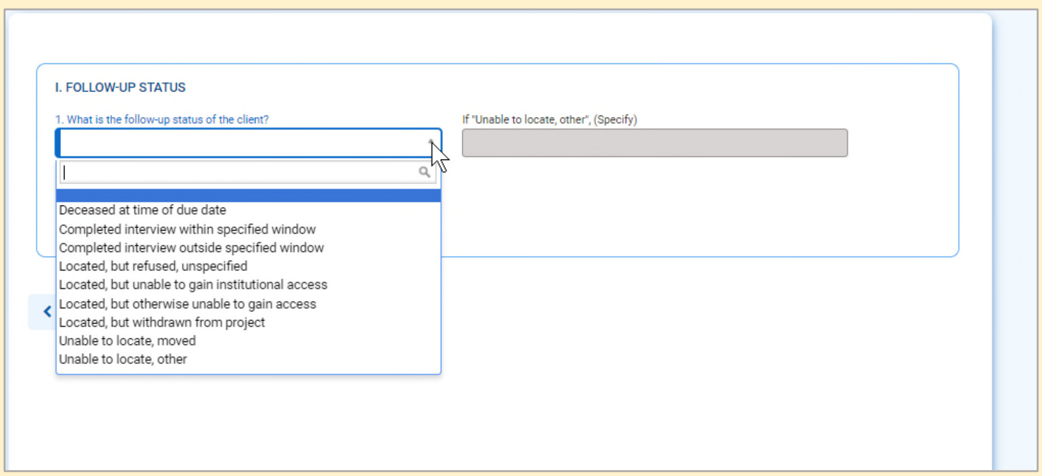


Figure 4-20: GPRA Follow-up Interview, Section A, questions 1a and 2a, prepopulated values

Note: For question I.1., make sure to select the correct follow-up status for the client from the drop-down list, especially when selecting if the interview was completed ***within*** specified window, or ***outside*** specified window.



7. Once all questions have been answered, a read-only summary screen is displayed. Scroll to the bottom of the summary and then click **Finish**.