

# **DARMHA and WITS User Manual**

## **Recovery Works: Treatment Providers**



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## SECTION ONE: DARMHA ENROLLMENT

### DARMHA Enrollment Overview

All Recovery Works participants, who are receiving treatment at a Recovery Works treatment provider facility, MUST first be enrolled in DARMHA (Data Assessment Registry Mental Health and Addiction). Once a participant is enrolled in DARMHA, agencies may bill in WITS (Web Infrastructure for Treatment Services).

**The following steps are required for a Recovery Works participant to be fully entered into DARMHA and pushed to WITS:**

- Create Participant on Consumer View page
- Start Episode
- Enter and Close Assessment
- *Either* of the following:
  - Complete NOMS & Diagnosis OR
  - Complete SUD Treatment \*recommended\*
- Submit to WITS

*Follow the instructions below to enter a participant into DARMHA:*

### Accessing DARMHA

1. Go to the DARMHA website: <https://dmha.fssa.in.gov/DARMHA>
2. Log in using your unique login information. This information would have been assigned and sent to you via email when your agency was setup with Recovery Works.
  - a. If you do not have a DARMHA login, please fill out a “DARMHA New User Form” and submit the Recovery Works help desk at <https://dmha.fssa.in.gov/helpdesk/?div=dmha>
  - b. If you believe your agency was not setup in DARMHA during your application process, please contact Recovery Works at [Recovery.Works@fssa.in.gov](mailto:Recovery.Works@fssa.in.gov)

**DARMHA**  
DATA ASSESSMENT REGISTRY MENTAL HEALTH & ADDICTION

**Login**

Home  
Documents  
Training  
Login

Username:

Password:

☐ Remember username

[Retrieve Password?](#)

## Create Participant

1. Begin on the consumer search page
2. Enter criteria in the fields to search for the individual you would like to add
3. If there are “No Records Found”, click **“Add New consumer”**.
  - a. If they exist, select their profile, and move to starting a new episode.

Consumer Search Last Accessed On 7/1/2021 10:49:53 AM

Last Name :  Birth Date :

First Name :  SSN :

Internal ID :  Medicaid # :

DARMHA ID :

**No Records Found!**

4. Enter all information on the consumer view page, and click **“Insert”**
  - a. Note: SSN is a requirement for Recovery Works participants

Add Consumers

Last Name:  Birth Date:

First Name:  SSN:

Middle Name:  Medicaid/HIP ID:

Suffix :  Ethnicity:

Mom's Maiden:  Does the consumer identify as a member of the LGBTQ+ community?

Sex at Birth:  If yes, Please answer sexual orientation question (choose all that apply)?

Gender Identity:  ☐ Prefer not to Answer ☐ Gay ☐ Lesbian

Internal ID:  ☐ Bisexual ☐ Asexual ☐ Pansexual

☐ Heterosexual/Straight ☐ Not Sure/Questioning ☐ Prefer to Self-Describe

Race (Choose all that apply) :

☐ African American or Black  
People having origins in any of the Black racial groups of Africa.

☐ American Indian and Alaska Native  
People having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.

☐ Asian  
People having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent.

☒ Caucasian or White  
People having origins in any of the original peoples of Europe, the Middle East, or North Africa.

☐ Native Hawaiian and Other Pacific Islander  
People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

☐ Other Single Race  
None of the other race categories apply.

What is the consumer's primary language?

Does the consumer understand and communicate proficiently in English? ☐ Yes ☐ No ☒ Not Applicable

## Start Episode

1. Still on the consumer view page, click **"Create Episode"** near the bottom

Record was added on 7/13/2021 10:19:21 AM

2. Fill the participant's information on the episode page out
  - a. Click the **"Recovery Works Program"** checkbox
    - i. Enrollment date is the date you received the referral
  - b. Finish by clicking **"Insert"**

**Episode View - Picatso, Pablo**

Episode Assessment Encounter NOMS EBP Diagnosis/Agreement SUD Treatment Restoration Program MRO

**Building New Episode:**  
Internal Episode Code:

Episode Start Date:

Episode End Date:

Episode Status:

DSC Status:

Marital Status:

County:

Zip Code:

Disability:

Referral Source:

Legal Basis:

Family Size:

Family Income:

Prior Substance Abuse Episodes:

Dependent Children? ☐ Yes ☒ No

Primary Insurance:

Insurance Change Date:

Military Service :

Veteran :

Deployed :

Combat :

Family Member in Military :

Medicaid/HIP Active? ☒ Yes ☐ No

SNAP/Food Stamps? ☐ Yes ☒ No

TANF? ☐ Yes ☒ No

☒ Recovery Works Program

Enrollment Date:

☐ Department of Child Services (DCS) Case

## Enter and Close Assessment

Before being able to complete an assessment, a staff member must be ANSA certified and an active user in DARMHA, so he/she can be selected as the clinician.

1. Click the "Assessment" tab
2. Click "New"

Assessment View - Picatso, Pablo

Last Accessed On 7/1/2021 10:49:53 AM

Episod **Assessment** Encounter NOMS EBP Diagnosis/Agreement SUD Treatment Restoration Program MRO

No Assessment Selected or available. Please select an assessment from above or create a new assessment.

New

3. Select your preferred mode for entering the ANSA:
  - a. Interview Mode – view questions and record answers
  - b. Rapid Entry Mode – only provides domain and bubble for recording score
  - c. Data Entry Mode – only provides domain and box to enter score number

Add Assessment - Picatso, Pablo

Assessment Entry Mode: ☒ Interview ☐ Rapid Entry ☐ Data Entry

Internal Assessment ID (optional):

Assessment Date: 07/13/2021

Assessor: ANSA, ClinicianGood

Reason for Assessment: ☒ Initial ☐ Reassessment ☐ Transition/Discharge

Select Assessment Tool: ANSA Comprehensive

Medicaid Active? ☐ Yes ☒ No

Medicaid #:

4. Enter the required Evidence-Based Practice responses

ACT Indicator? ☐ No ☐ Yes

Illness Management and Recovery (IMR)? ☐ No ☐ Yes, with fidelity ☐ Yes, without fidelity

Integrated Dual-Diagnosis Treatment (IDDT)? ☐ No ☐ Yes, with fidelity ☐ Yes, without fidelity

Motivational Interviewing? ☐ No ☐ Yes

Cognitive Behavioral Therapy (CBT)? ☐ No ☐ Yes

Matrix Model? ☐ No ☐ Yes

Dialectical Behavior Therapy (DBT)? ☐ No ☐ Yes

Participates in Clubhouse? ☐ No ☐ Yes

Peer Support Involvement? ☐ No ☐ Yes

Family Psychoeducation (FPE)? ☐ No ☐ Yes

Medication Management (MTM)? ☐ No ☐ Yes

Supported Employment? ☐ No ☐ Yes

Supported Housing? ☐ No ☐ Yes

Reporting Field 1: <Select Field1>

Reporting Field 2: <Select Field2>

Start Assessment Cancel

5. Click "Start Assessment"
  - a. \*Note: You can change your assessment mode at any time at the top of the screen

ANSA Comprehensive (New)	
Key	
Life Functioning Domain	Life Functioning Domain
Strengths Domain	Medical/Physical

Assessment Format : 
 

Data Entry Mode ▼  
 Interview Mode  
 Rapid Entry Mode  
 Data Entry Mode

6. Complete all domains and required questions with a score
  - a. If you need to stop during the middle, make sure to click “Save Assessment”
7. Once the entire assessment is complete, click **“Close & Process Assessment”**
  - a. This step is VERY important! You will be unable to push the client to WITS without closing the assessment.

Save Assessment

Close & Process Assessment

Cancel

### Option 1: Complete NOMS & Diagnosis

1. Select the "NOMS" tab
2. Click "New"
3. Complete the fields

**NOMS View - Picatso, Pablo**

Episode Assessment Encounter **NOMS** EBP Diagnosis/Agreement SUD Treatment Restoration Program MRO

NOMS Date: 07/13/2021

NOMS Reason: ☒ Initial ☐ Re-Assessment ☐ Discharge  
Limit 1 Initial and Discharge per episode

Employment: Employed - Part Time(11 -15 hours)

Employment Detail: Other

Living Arrangement: Other

ROLES: Not Applicable

Needle Use: No, Consumer has not used a needle

Education Level : 2 Years of College Completed/Associ

School Attendance Status : Not applicable (use for infant:)

Criminal Involvement: 0

Social Support: About once a week (4-7 times)

Currently Pregnant? ☐ Yes ☒ No

4. Answer the questions regarding Medication Assisted Treatment

Is the consumer receiving Medication-Assisted Treatment (MAT) ? ☐ Yes ☒ No ☐ (Not Applicable) (Clear)

If yes, what medication is being prescribed : Not Applicable

If yes, is the prescriber a staff at your organization ? ☐ Yes ☒ No ☐ (Not Applicable)

5. Enter the information about substances and smoking
6. Click "Insert"

**Primary Substance**

Alcohol

Route: Oral

Frequency: Three - six times pe

Age First Used: 12

**Secondary Substance**

Not Applicable

Route: Not Applicable

Frequency: Not Applicable

Age First Used:

**Tertiary Substance**

Not Applicable

Route: Not Applicable

Frequency: Not Applicable

Age First Used:

Currently Smoking and/or using tobacco products? ☐ Yes ☒ No

Agency offered tobacco cessation counseling or cessation medication to this consumer? ☐ No ☐ Yes

Which of the following cessation options did the agency offer to this consumer (pick all that apply) ?

☐ Counseling via phone (example: 1-800-Quit Line)

☐ Counseling from your agency

☐ Counseling from an outside organization other than Quit Line

☐ Cessation medication

Stopped using tobacco products? ☐ No ☐ Yes ☒ Never Used


**Insert** Cancel



7. Select the **“Diagnosis/Agreement”** tab
8. Click **“New”**
9. Enter the required information about the diagnosis
10. Click **“Insert”**

## Diagnosis & Agreement Type View - Picatso, Pablo

Last Accessed On 7/1/2021 10:49:33 AM

Episode	Assessment	Encounter	NOMS	EBP	Diagnosis/Agreement	SUD Treatment	Restoration Program	MRO
<div> <div> Diagnosis/Agreement Date : <input type="text" value="07/13/2021"/>  </div> <div> Primary Diagnosis 1: <input type="text" value="F10.14"/> </div> <div> Diagnosis 2: <input type="text"/> </div> <div> Diagnosis 3: <input type="text"/> </div> <div> Diagnosis 4: <input type="text"/> </div> <div> Diagnosis 5: <input type="text"/> </div> <div> SOGS: <input type="text"/> </div> </div> <div> <div> <b>Health Conditions:</b> </div> <div> 1. Diabetes? <input checked="" type="radio"/> No <input type="radio"/> Yes  2. Cardiovascular Disease? <input checked="" type="radio"/> No <input type="radio"/> Yes  3. Hypertension (High Blood Pressure)? <input checked="" type="radio"/> No <input type="radio"/> Yes  4. Hyperlipidemia (High Cholesterol)? <input checked="" type="radio"/> No <input type="radio"/> Yes  5. Cancer? <input checked="" type="radio"/> No <input type="radio"/> Yes  6. Obesity? <input checked="" type="radio"/> No <input type="radio"/> Yes  7. Asthma? <input checked="" type="radio"/> No <input type="radio"/> Yes  8. COPD (Chronic Obstructive Pulmonary Disease)? <input checked="" type="radio"/> No <input type="radio"/> Yes </div> </div> <div> <b>Agreement Type</b>  <input type="radio"/> SMI  <input type="radio"/> SED  <input checked="" type="radio"/> SUD Treatment Only  <b>Specialized Treatment</b>  <input checked="" type="radio"/> None  <input type="radio"/> Deaf Services  <input type="radio"/> Gambling Treatment  <b>Agreement Change</b>  <input checked="" type="radio"/> Initial  <input type="radio"/> Refined Diagnosis  <input type="radio"/> Special Funding </div>								

## Option 2: Complete SUD Treatment

1. Click the "SUD Treatment" tab
2. Click "New Admission"
3. Enter the required admission information, which is essentially a combination of the NOMS & Diagnosis information

Last Accessed On 7/1/2021 10:49:53 AM

### SUD Treatment - Picatso, Pablo

Episode Assessment Encounter NOMS EBP Diagnosis/Agreement **SUD Treatment** Restoration Program MRO

**Admission**

#### ADMISSION

Admission Date: 07/13/2021 Internal Admission ID:

Service Setting Type: AMBULATORY, NON-INTENSIVE OUTPATIENT

Service Setting: DMHA Test Facility 1

Location: Choose.. 111 No Way Indianapolis IN 46204

Primary Diagnosis 1: F10.14 - ALCOHOL-INDUCED BIPOLAR AND RELATED DISORDER OR ALCOHOL

Diagnosis 2:

Diagnosis 3:

Diagnosis 4:

Diagnosis 5:

Primary Substance: Alcohol

Route: Oral

Frequency: Three - six times

Age First Used: 12

Secondary Substance: Not Applicable

Route: Not Applicable

Frequency: Not Applicable

Age First Used:

Tertiary Substance: Not Applicable

Route: Not Applicable

Frequency: Not Applicable

Age First Used:

Is the consumer receiving Medication-Assisted Treatment (MAT)? ☐ Yes ☒ No (Clear)

If yes, what medication is being prescribed? Not Applicable

If yes, is the prescriber a staff at your organization? ☐ Yes ☐ No

Specialized Treatment:

SOGS:  ☒ (None)

---

**Health Conditions**

Diabetes?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Chronic Obstructive Pulmonary Disease (COPD)?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Cardiovascular Disease?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Hepatitis A?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Hypertension (High Blood Pressure)?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Hepatitis B?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Hyperlipidemia (High Cholesterol)?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Hepatitis C?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Cancer?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Tuberculosis (TB)?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Obesity?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Human Immunodeficiency Virus (HIV)?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Asthma?	<input type="radio"/> Yes <input checked="" type="radio"/> No		

---

Education Level:	<input type="text" value="2 Years of College Cc"/>	Living Arrangement:	<input type="text" value="Other"/>
School Attendance:	<input type="text" value="Not applicable (use fc)"/>	Social Support:	<input type="text" value="About once a week (4-7)"/>
Employment Status:	<input type="text" value="Employed - Part Time"/>	Needle Use:	<input type="text" value="No, Consumer has not u"/>
Employment Detail:	<input type="text" value="Other"/>	Criminal Involvement:	<input type="text" value="0"/>
ROLES Score:	<input type="text" value="Not Applicable"/>	Currently Pregnant?:	<input type="radio"/> Yes <input checked="" type="radio"/> No

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Currently Smoking and/or using tobacco products? ☐ Yes ☒ No

Agency offered tobacco cessation counseling or cessation medication to this consumer? ☐ No ☐ Yes

Which of the following cessation options did the agency offer to this consumer (pick all that apply) ?

- ☐ Counseling via phone (example: 1-800-Quit Line)
- ☐ Counseling from your agency
- ☐ Counseling from an outside organization other than Quit Line
- ☐ Cessation medication

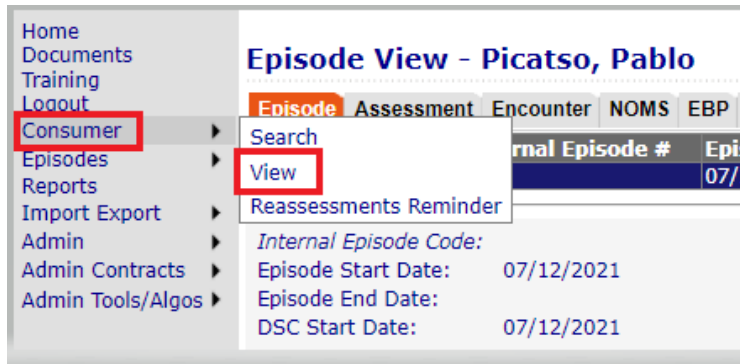
Stopped using tobacco products? ☐ No ☐ Yes ☒ Never Used

4. Click "Insert Admission"
5. **Please note: once the participant leaves, you must complete a SUD discharge**

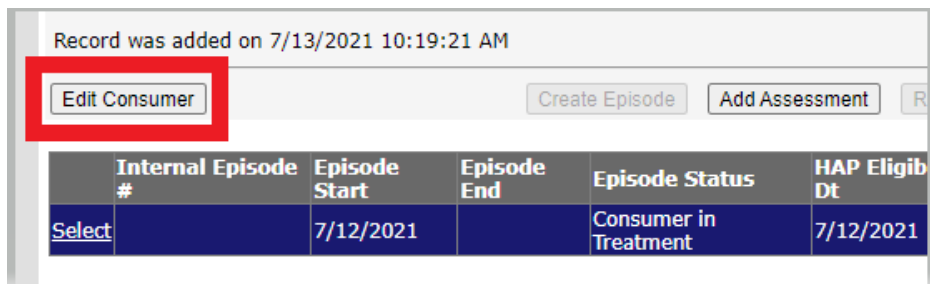
## Submit to WITS

This is the FINAL step for Recovery Works participants. You MUST push them to WITS in order to bill for their services.

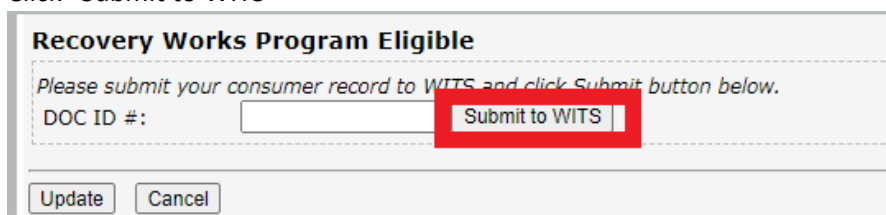
1. You are likely on the episode page, and we need to go to the consumer view page.
2. On the left menu bar, hover “Consumer”, then click “View”



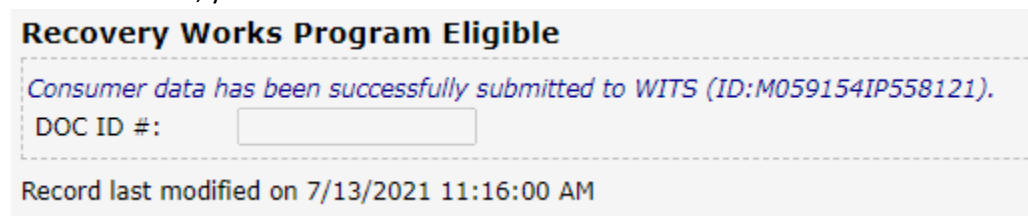
3. Click “Edit Consumer”



4. A box should pop up that says “Recovery Works Program Eligible” and there should be a “Submit to WITS” button
  - a. \*Note: if you do NOT see this box when you clicked “Edit Consumer” then you are missing on of the required tabs
5. Click “Submit to WITS”



6. Once successful, you should see the client’s WITS ID listed.

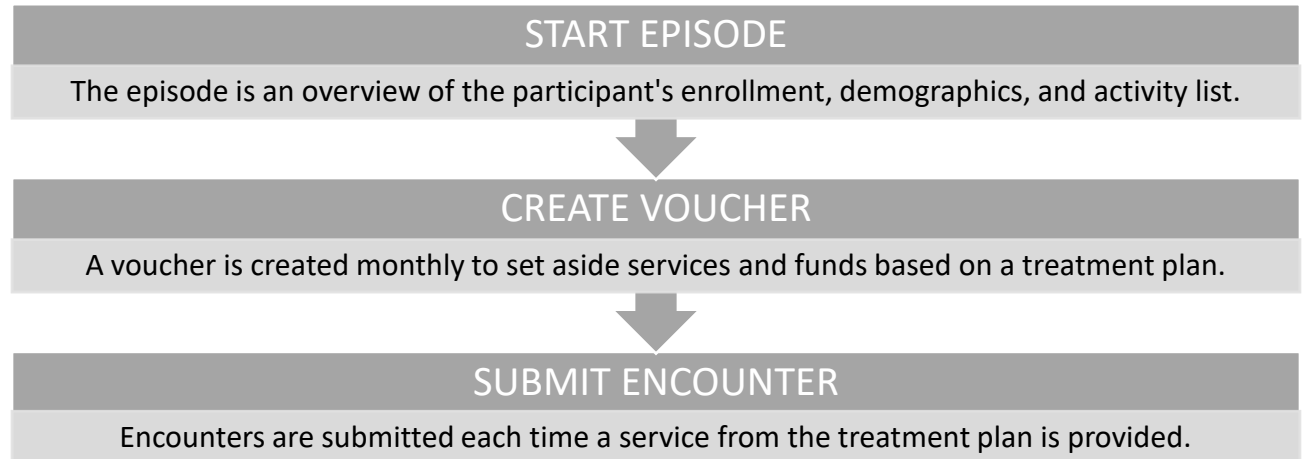


## SECTION TWO: WITS BILLING

### WITS Billing Overview

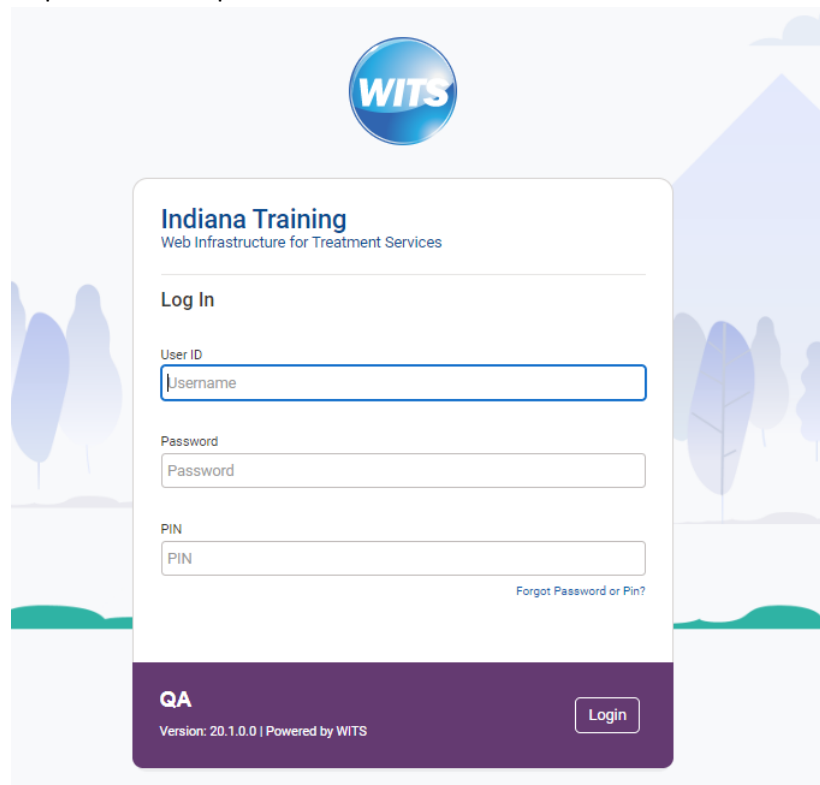
WITS is the Web Infrastructure for Treatment Services. It is a web-based application that is used to collect participant information and reimburse for services provided. Once a participant is pushed from DARMHA to WITS, the provider must use WITS to submit claims (encounters) for rendered services.

*The main steps of billing for a participant are outlined below:*



## Accessing WITS

1. Go to the WITS website: <https://dmha.fssa.in.gov/atr>
2. Log in using your assigned user ID, which was emailed to you when your account was setup
  - a. If you do not have a WITS login, please submit the “WITS Setup Spreadsheet” to the Recovery Works help desk at <https://dmha.fssa.in.gov/helpdesk/?div=dmha>.
  - b. \*Note: if this is your first time logging in, you will need to set your Security Question to create a password and pin.

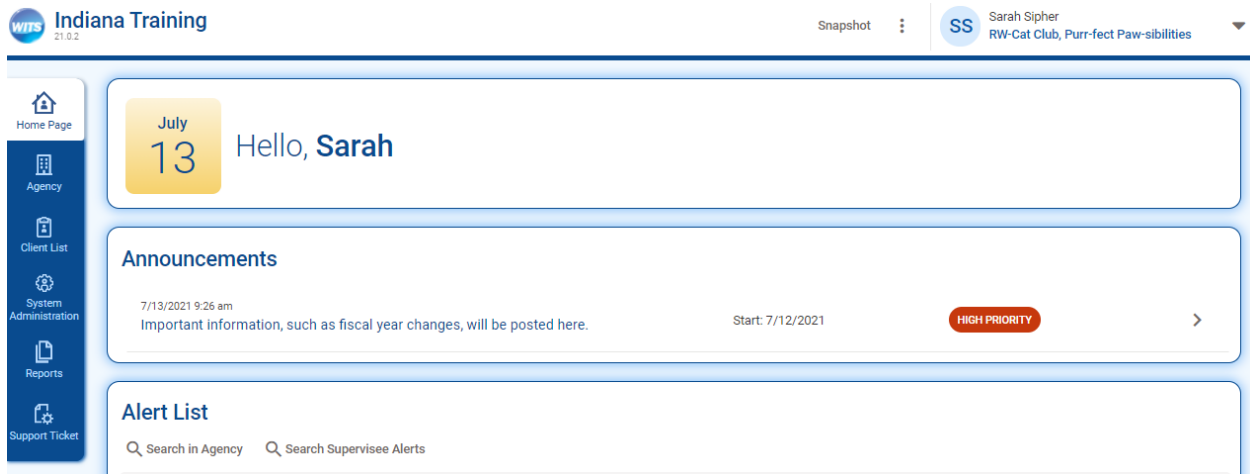


The screenshot shows the WITS login interface. At the top center is the WITS logo, a blue circle with the word "WITS" in white. Below the logo is a white login box with a purple header. The header contains the text "Indiana Training" in bold and "Web Infrastructure for Treatment Services" in a smaller font. Below the header is a "Log In" section with three input fields: "User ID" (containing the placeholder "Username"), "Password" (containing the placeholder "Password"), and "PIN" (containing the placeholder "PIN"). To the right of the PIN field is a link that says "Forgot Password or Pin?". At the bottom of the login box is a purple footer with the text "QA" and "Version: 20.1.0.0 | Powered by WITS". A "Login" button is located in the bottom right corner of the login box.

## Home Screen

The home screen is typically the first screen you will see when you log into WITS. It provides general information, such as announcements, alerts, or updates in schedule.

The announcement section will have helpful information from the Recovery Works team. Click the arrow to view details of the announcement.



Recovery Works providers do not utilize the Alert List or Scheduler at this time, so disregard those areas.

## Client Search

The WITS process always starts with the client you are treating. This section walks you through ways to locate the client and review the information that was automatically created when you pushed the client from DARMHA to WITS.

1. To search for a specific client, click on the **“Client List”** link in the left navigation menu. A blank Client List will appear.
  - a. Search by first/last name or unique client number (UCN).
  - b. Click **“advanced search”** to search by DOB or SSN.
  - c. Click **“search”** to process the search.
    - i. You can also enter a partial name (or other field) following by an asterisk (\*). This is called a wild card search. For example: if you search for the last name “Smit\*”, you will get people with the last name “Smith”, “Smitty”, or “Smithson”
    - ii. For date fields, you can use conditional searches, such as “>01/01/1990”. This would return results with a DOB greater than 01/01/1990.

The screenshot shows the WITS Client Search interface. On the left, the navigation menu has 'Client List' highlighted. The main area is titled 'Client Search' and contains search fields for Facility, First Name (containing 'Pablo'), Last Name, and Unique Client Number. A 'Search' button is highlighted. Below the search form, the 'Client List' table shows one result: PICATSO, Pablo, with a unique client number M059154IP558121 and a phone number 445-45-5554. The 'Profile' link is highlighted.

2. Look for your client in the client list. If you find the right person, pull up the profile by clicking the ellipsis and selecting Profile.
  - a. The UCN should match the value that is in DARMHA.

The screenshot shows the WITS Client List interface. The 'Client List' table shows one result: PICATSO, Pablo, with a unique client number M059154IP558121 and a phone number 445-45-5554. The 'Profile' link is highlighted.

3. If you do not find the client by name, SSN, DOB, or UCN, please contact the Recovery Works help desk for assistance.
4. You can also hit **“Search”** without any search criteria, and it will pull a list of ALL clients.



## Client Profile

The client profile provides an overview of the client's demographic information. This information is being pulled from the information you entered into DARMHA.

The DARMHA client ID field will match the client's DARMHA ID in DARMHA. You will notice the Record Created By field has a value "Web Provider, DARMHA", which indicates that the profile was generated from DARMHA information.

PICATSO, PabloUCN M059154IP55812139Male

Home Page

Agency

Client List

System Administration

Reports

Support Ticket

Client List

Client Profile

Alternate Nam...

Additional Inf...

Contact Info

Collateral Con...

Other Numbers

History

Client Group E...

Voucher

Allergies

Linked Consents

Activity List

Episode List

### Client Profile

Hide Context Information

Unique Client Number  
M059154IP558121

State Client ID

Created By  
Web Provider, DARMHA

Created Date  
7/13/2021 11:15 AM

Updated By  
Web Provider, DARMHA

Updated Date  
7/13/2021 11:15 AM

First Name  
Pablo

Middle Name

Last Name  
Picatso

Mother's Maiden Name

Suffix

Sex  
Male

Gender Identity

DOB  
10/25/1981

SSN  
445-45-5554

DARMHA Client ID  
1387343

Driver's License

Residence Zip Code  
46038

Medicaid #

Has paper file  
☐ Yes ☐ No

Upload Profile Image

No File Selected...BrowseUpload

< Back

Next >

Save

Save and Finish

× Cancel

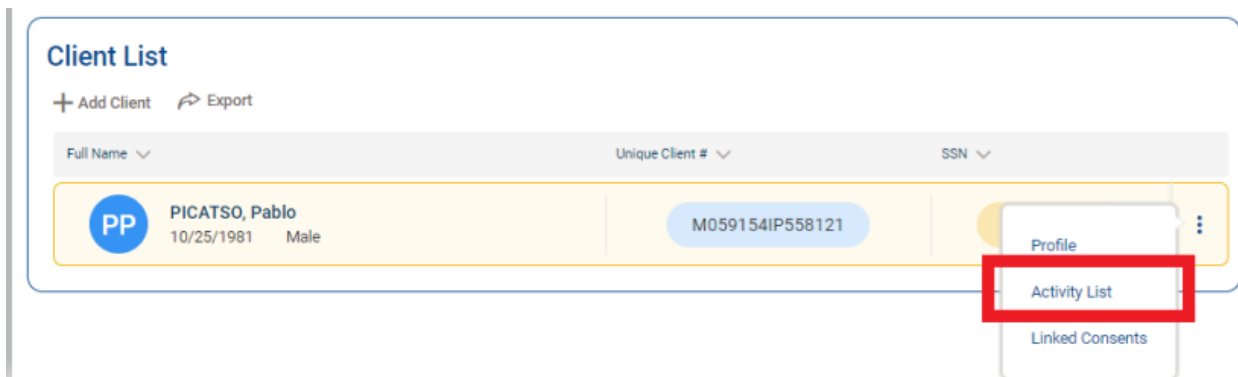
## Guided Workflow for Participant Billing

All fields with an orange mark are required fields.

### Step 1: Starting an Episode in the Client's Activity List

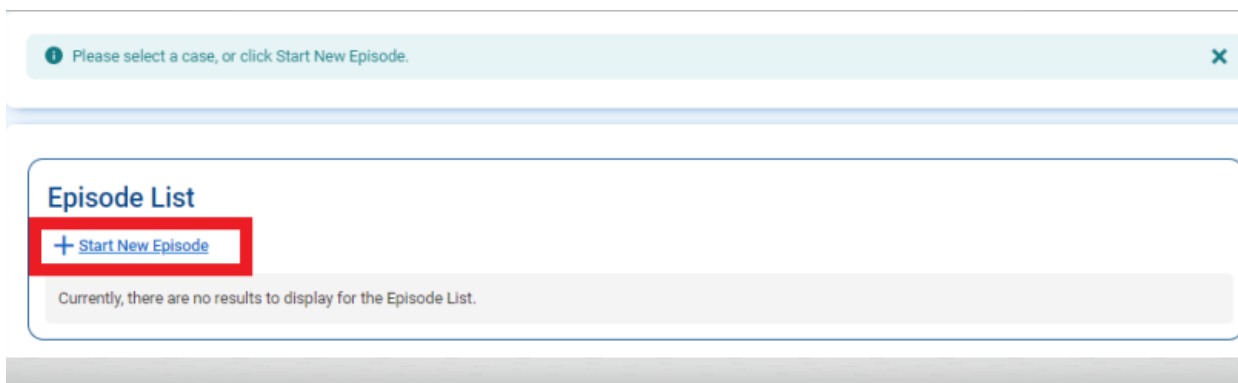
The Client Activity List provides an overview to the entire client's profile, episode (intake), encounter, and program enrollment information. To begin logging services in WITS, **you must start an episode**. This is only done ONCE, unless the client leaves treatment and later receives a new referral.

1. Select the appropriate client from the Client List by clicking the ellipsis and selecting “**Activity List**”



The screenshot shows the 'Client List' interface. At the top, there are buttons for '+ Add Client' and 'Export'. Below are filters for 'Full Name', 'Unique Client #', and 'SSN'. A client entry for 'PICATSO, Pablo' (DOB: 10/25/1981, Male, Unique Client #: M059154IP558121) is highlighted. A dropdown menu is open for this client, showing options: 'Profile', 'Activity List' (highlighted with a red box), and 'Linked Consents'.

2. Click “**Start New Episode**”



The screenshot shows the 'Episode List' interface. At the top, there is a message: 'Please select a case, or click Start New Episode.' Below this, the 'Episode List' section is visible. A button labeled '+ Start New Episode' is highlighted with a red box. Below the button, a message states: 'Currently, there are no results to display for the Episode List.'

3. Complete the required fields on the intake information screen
  - a. Initial Contact: Select the most appropriate value
  - b. Residence: Select the county of residence of the client
  - c. Intake Date: Change this to the date the client received a RW referral
    - i. Cannot be more than 14 days ago from the DARMHA intake
  - d. Referral Source: Select most appropriate value – usually Criminal Justice Provider
  - e. Intake Staff: Select the provider who did the assessment

## Intake Case Information

^ Hide Context Information

Case #  
1

Intake Facility They got out	Intake Staff Sipher, Sarah	Case Status Open Active
Initial Contact By Appointment	Initial Contact Date <input type="text"/>	Intake Date 7/12/2021
Pregnant No	Prenatal Treatment <input type="radio"/> Yes <input type="radio"/> No	Residence Hamilton
Source of Referral Criminal Justice Provider	HIV Positive <input type="text"/>	Problem Area <input type="text"/>
The client has been given a list of providers to choose from? <input checked="" type="radio"/> Yes <input type="radio"/> No		
Domains <input type="text"/>	Selected Domains Forensic	
Date Closed <input type="text"/>		
<div>Save Save and Finish × Cancel</div>		

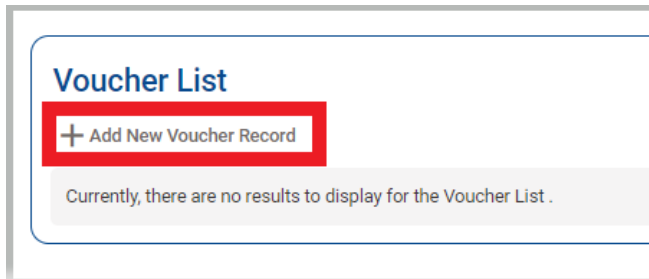
4. Click **“Save and Finish”** and you will be returned to the Client Activity List
5. See next section for Creating Vouchers

## Step 2: Creating a Voucher

A voucher is essentially an estimate of the services you think you will provide to the client during a 30-day period. The dates of the voucher should not exceed a single month's time. You can alter the start date to be 10 days ago from the current date. We recommend making the end date the last day of the current month, and then starting a new voucher on the 1<sup>st</sup> of each month.

*\*Note: You cannot make a voucher until an episode has been started.*

1. From the Client Activity List screen, click **"Client Profile"** on the left menu bar
2. Click **"Voucher"** > **"Add New Voucher Record"**



3. Alter the **effective (start) date** of the voucher to the date you need. It defaults to the current date.
  - a. *\*Note: you can only go back 10 days*
4. Alter the **end date** to be the last day of the current month
5. Select the agreement to the current fiscal year if it does not auto-populate for you

### Voucher

^ Hide Context Information

ID	Administering Agency RW - They got out		
Created By	Created Date	Updated By	Updated Date

Group Enrollment	Status	
Recovery Works (7/1/2021)	Active	
Plan	Voucher	
Recovery Works		
Agreement		
0000055555 - RW - They got out / 7/1/2021 - 6/30/2022 - Recovery Works-Recovery Works		
Effective Date	End Date	Date Approved
7/12/2021	7/30/2021	7/13/2021

6. Hit **"Save"**
7. Click **"Add Service"** to add services from the client's treatment plan to the voucher

- Vouched**

- Once all the services are added to the voucher, click “Save and Finish”
- Your voucher should look something like the image below:

### Vouched Services List

[+ Add Service](#)

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units	
Case Management - Recovery Works	12	\$226.68	\$0.00	\$0.00	12.00	⋮
AOD Urine Screen -RW	8	\$156.00	\$0.00	\$0.00	8.00	⋮
Mental Health Counseling- Individual	8	\$229.20	\$0.00	\$0.00	8.00	⋮

Total Vouched:

\$611.88

Total Encumbered

\$0.00

Total Expended

\$0.00

Total Available

\$611.88

[Save](#)

[Save and Finish](#)

[× Cancel](#)

10. Hit “Save and Finish” to return to the Voucher List screen
11. See next section for Submitting Encounters

*\*Note: You can edit the dates, services, and units on a voucher at any time UNTIL dollars have been encumbered or expended. If you have already billed an encounter and an additional service or units, please submit a help desk request asking for it to be added to the voucher.*

**Important Terminology:**

- Total Vouched: the total dollar amount set aside for services for the date range of the voucher
- Total Encumbered: the total dollar amount that has been submitted to billing, but has not been processed to be paid out
- Total Expended: the total dollar amount that has been paid out from the voucher
- Total Available: the remaining dollar amount after services have been encumbered and expended

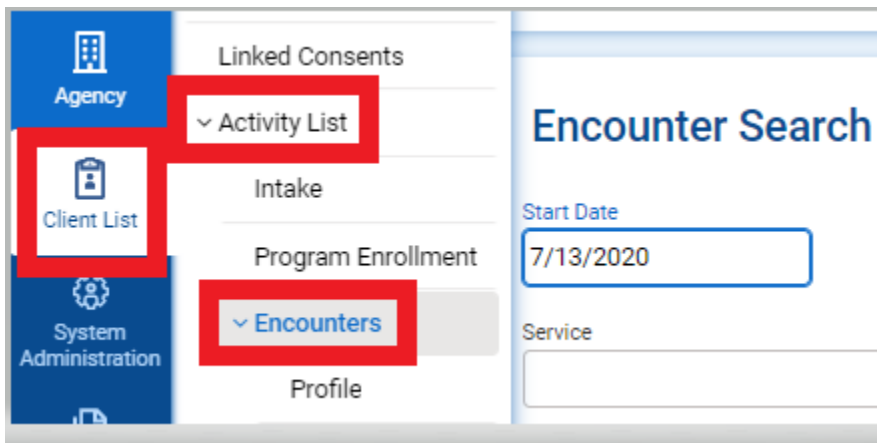
### Step 3: Submitting an Encounter

It is required to submit an encounter in order to be paid for the service. Encounters will pull dollars from your voucher to claim for the service that has been rendered.

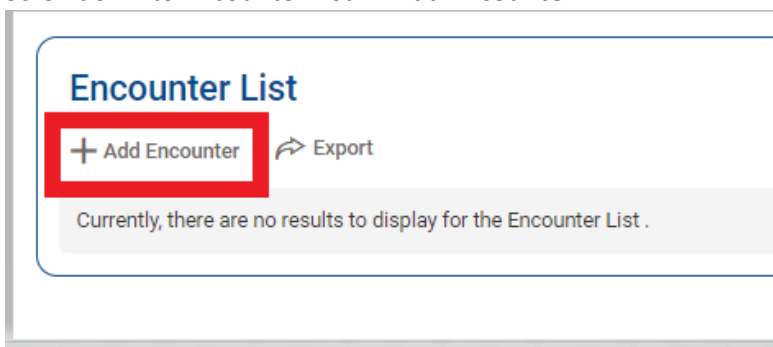
For each service provided, an individual encounter must be submitted. **Bulk billing is not allowed.** For example: If the client received case management on Monday and Wednesday, then that would be two separate encounters – one for Monday, and one for Wednesday.

Encounters can be submitted during any time while the associated voucher is open – but they **MUST** be submitted no more than 10 days after the end date of the voucher. For example: If the associated voucher has dates of 7/13-7/31, then you must finish submitting encounters for that voucher by 8/10. Once the voucher is closed, encounters can also not be submitted.

1. Select the client you are working on from the Client List screen (select Client List on left menu bar)
2. Open the **Activity List** using the ellipsis
3. Select **“Encounters”**



4. Scroll down to Encounter List > **“Add Encounter”**



5. All fields with an orange mark are required:
  - a. Service: Select the service you are claiming
  - b. Service Location: Select the county of service
  - c. Start Date: Choose the date of service – should match the day the service was provided
  - d. End Date: Leave blank
  - e. Start Time: Time the session started
  - f. End Time: Time the session ended

- g. Duration: Auto-populates the amount of time
  - h. # of Service Units/Sessions: Calculated based on the rate sheet
  - i. Rendering Staff: Staff member who provided the service
  - j. Notes: Not required if they are in the client's physical file
6. Once all fields are filled out, click **"Save"** > **"Release to Billing"**

### Encounter

ENC ID <input type="text"/>	Created Date <input type="text"/>
Service Case Management - Recovery Works	
Program Name They got out/Recovery Works : 7/1/2021 -	
Service Location Hamilton	Start Date 7/13/2021
	End Date <input type="text"/>
	Start Time 2:00 PM
	End Time 3:00 PM
Duration 60	Min
# of Service Units/Sessions 4	
Rendering Staff Sipher, Sarah	

7. You MUST click **"Release to Billing"** as the final step

Notes

One hour of case management provided to Pablo Picatsc

Administrative Actions

Release to Billing

Save

Save and Finish

× Cancel

*\*Note: It is important to stay on top of encounters and bill on time. Once the 10-day grace period passes, you will be unable to submit claims and will not be paid for the service(s).*



## Consent/Referral Process

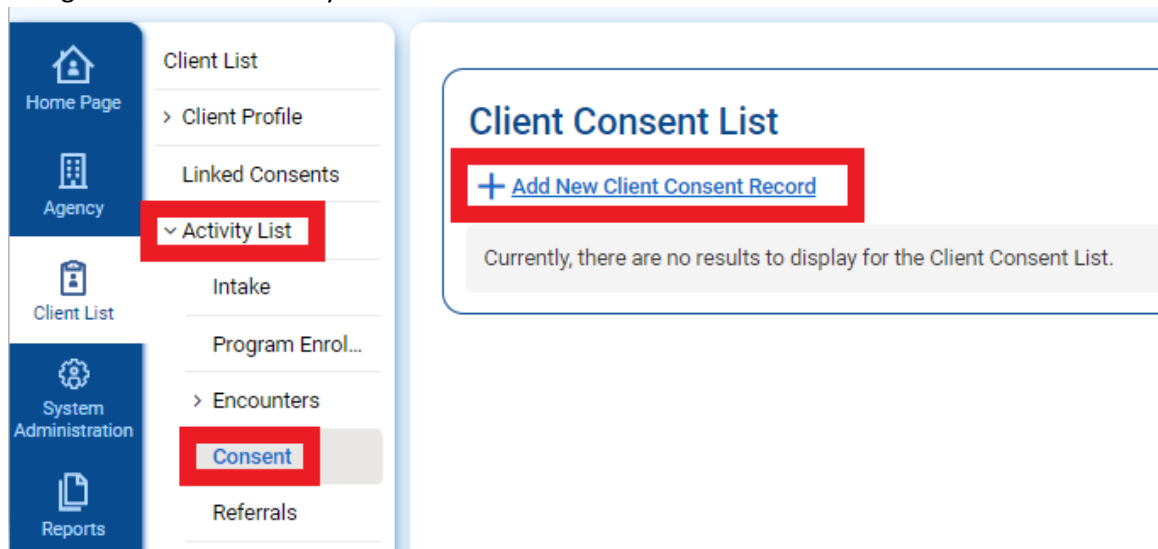
The consent/referral process is NOT a required process – but it provides a mechanism for two agencies (a primary agency “treatment provider” and a secondary agency “recovery residence”) to share a client electronically.

WITS allows client information to be consented or “shared electronically” within the system. This is accomplished by:

1. WITS admin setting up an agency disclosure to create a template for consent for both the primary and secondary agency
2. Primary agency creating a consent record at the individual client level
3. Primary agency creating an active electronic referral by selecting the secondary agency to which you are referring (“sharing”) the client
4. Primary agency setting up an authorization (voucher) for the secondary agency
5. Secondary agency accepting the referral
6. Secondary agency accepts the authorization (voucher)

## Create Consent Record

1. Navigate to Client > Activity List > Consent > **Add New Client Consent Record**



2. Fill in the appropriate fields on the consent form:

## Client Disclosure Agreement

^ Hide Context Information

Note: Consented information may not be redisclosed.

**Client Name**  
Picatso, Pablo

**Unique Client Number**  
M059154IP558121

**Disclosed From Agency**  
RW - They got out

Entities with Disclosure Agreements

All Other Agencies

System Agency

☒ Yes ☐ No

Disclosed To Agency

RW-Cat Club

Facility

All Facilities

Disclosed To Entity (Non System Agency)

Purpose for Disclosure

needs housing

Earliest Date of Services to be Consented

7/20/2021

Has the client signed the paper agreement form

☒ Yes ☐ No

Date Client Signed Consent

7/20/2021

### 3. Select **ALL** options under “client information to be consented”

**Client Information To Be Consented**  
\*Expiration type is required for disclosure activities.

Expiration Type + Days  
Date Signed(DS)

\*Expiration type is required for Disclosure activities.

Client Information Options

Disclosure Selection

- ANSA Assessment (UD, +90)
- AUDIT Screen (UD, +90)
- Case Notes (UD, +90)
- Client Information (Profile) (UD, +90)
- Client Log (UD, +90)
- Consent (UD, +90)
- CONTINUUM™ (UD, +90)
- DAST-10 Screen (UD, +90)
- Demographic Data (UD, +90)
- Diagnosis List (UD, +90)
- GPRA Interview (UD, +90)

### 4. Click **SAVE** – not finish

## Create Electronic Referral

1. Remain on the Client Disclosure Agreement page under Client List > Activity List > Consent
2. In the right-hand corner, click **“Create Referral Using this Disclosure Agreement”**

## Client Disclosure Agreement

+ Create Referral Using this Disclosure Agreement

^ Hide Context Information

*Note: Consented information may not be redisclosed.*

Client Name Picatso, Pablo	Unique Client Number M059154IP558121	Disclosed From Agency RW - They got out
-------------------------------	---	--

3. Under the **“Referred By”** section, choose a reason for the referral and fill out the fields below
  - a. “Is consent verification required” = YES
  - b. “Is consent verified” = YES
  - c. “Continue this episode of care” = NO

### Referred By

Agency  
RW - They got out

Facility  
They got out

Staff Member  
Sipher, Sarah

Program  
They got out/Recovery Works : 7/1/2021 -

State Reporting Category

Reason  
Service not available at this facility

If Other

Is Consent Verification Required?  
☒ Yes ☐ No

Is Consent Verified?  
☒ Yes ☐ No

Continue This Episode of Care?  
☐ Yes ☒ No

4. Under the **“Referred To”** section, select agency (facility) to which you are referring the client to

**Referred To**

Signed Consents  
 RW-Cat Club ▼

Agency  
 RW-Cat Club

Facility  
 Purr-fect Paw-sibilities ▼

Staff Member  
 ▼

Program  
 Recovery Works (NA) ▼

5. Referral status = **“Referral Created/Pending”**

Referral Status  
 Referral Created/Pending ▼

Referral Date  
 7/20/2021 📅

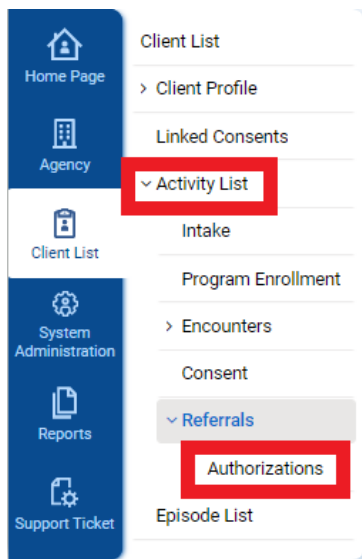
Projected End Date  
 📅

Created Date  
 7/20/2021 9:43 AM

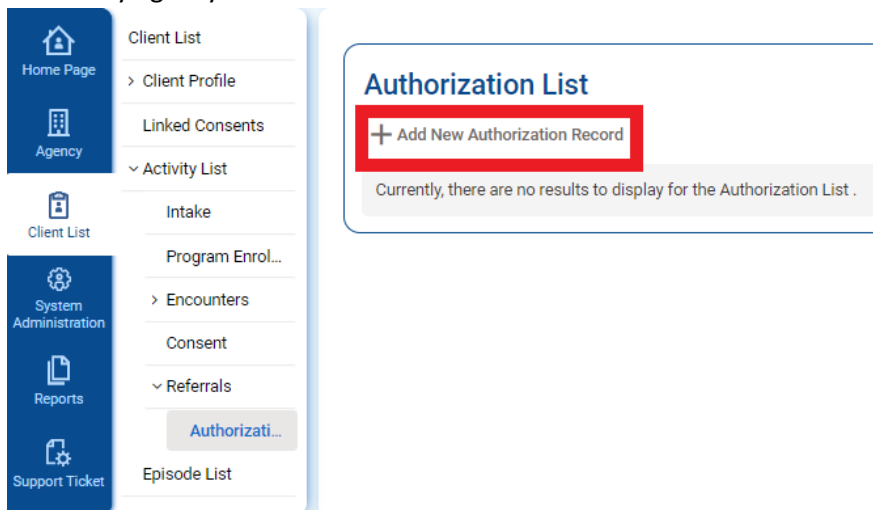
6. Hit **SAVE**

Creating an Authorization for a Referral

1. Remain on the Referral page under Client List > Activity List > **Referrals**
2. Select **“Authorizations”** on the left menu bar under Referrals



3. Click **"Add New Authorization Record"** – this is creating the referred voucher that is going to the secondary agency



4. Select the dates and services/units that the client needs at the secondary agency
5. Hit SAVE
6. Notice a few things about this referred voucher that differs from an ordinary voucher:
  - a. Administering agency is the primary agency who has created the voucher and made the referral
  - b. Status of the voucher is pending until the secondary agency accepts it
  - c. Contract is the facility of the secondary agency

## Authorization

[^ Hide Context Information](#)

ID 781	<b>Administering Agency</b> RW - They got out		
Created By Sipher, Sarah	Created Date 7/20/2021 9:52 AM	Updated By Sipher, Sarah	Updated Date 7/20/2021 9:52 AM

Group Enrollment <input type="text"/>	<b>Status</b> Pending
Plan Recovery Works	Authorization # 781

Contract 000001234	<b>Purr-fect Paw-sibilities</b>	7/1/2021 - 6/30/2022 - Recovery Works-Recovery Works
-----------------------	---------------------------------	--

Effective Date 7/20/2021	End Date 7/31/2021	Date Approved 7/20/2021
-----------------------------	-----------------------	----------------------------

Comments

### Accepting Referrals and Authorizations

Secondary agencies are notified of pending referrals at the top of the home page when logging into the system.

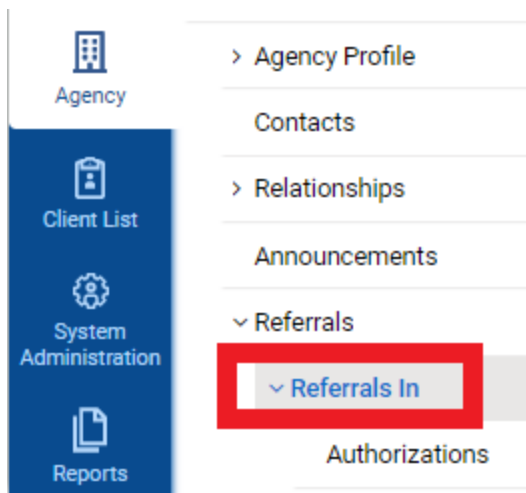
Snapshot

SS Sarah Sipher  
RW-Cat Club, Purr-fect Paw-sibilities

There is currently 1 person that has been referred in.

X

1. Navigate to **Agency > Referrals > Referrals In > Search** to accept an incoming referral from a primary agency



2. Under Referral Status, you should see new referrals that have a status of **“Referral Created/Pending”**
  - a. These need to be changed to **“Placed/Accepted”**

Search  Clear

**Referrals for Purr-fect Paw-sibilities**

Export

Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
M059154IP558121	Picatso, Pablo	10/25/1981	7/20/2021	RW - They got out/They got out	Recovery Works	Referral Created/Pending	Purr-fect Paw-sibilities	

3. Hover the ellipsis and click **“Review”**
4. Scroll down to Referral Status and change it to **“Placed/Accepted”**

Referral Status

Referral Created/Pending

Placed/Accepted

Referral Created/Pending

Referral Terminated

Refused Treatment

Rejected by Program

Wait List

Created Date

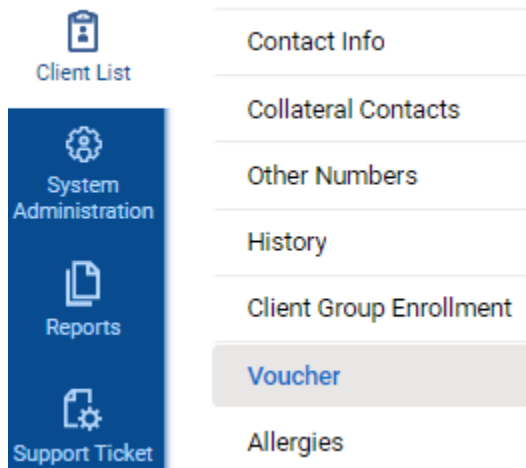
7/20/2021 9:46 AM

Save and Finish

5. Hit **“Save and Finish”**
6. You should now be on the Client Profile for the referred client who you just accepted

## Accepting the Referred Voucher

1. From Client List screen, select **"Voucher"** on the left menu bar

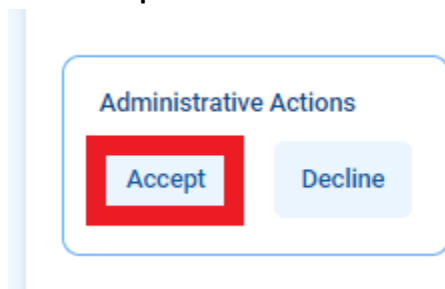


2. Look for the **"Pending"** voucher

The screenshot shows the 'Voucher List' screen. At the top, there is a link '+ Add New Voucher Record'. Below it is a table with columns: Auth #, Payor, Status, Effective Date, End Date, Authorized, Encumbered, Expended, Available, Last Activity Date, and a three-dot menu icon. The table contains two rows. The first row has a status of 'Closed'. The second row has a status of 'Pending', which is highlighted with a red box.

Auth #	Payor	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date	
763	Recovery Works [Recovery Works, 0000012345]	Closed	5/25/2020	6/17/2020	\$108.00	\$0.00	\$108.00	\$0.00	5/25/2020	⋮
781	Recovery Works [Recovery Works, 0000012345]	Pending	7/20/2021	7/31/2021	\$837.00	\$0.00	\$0.00	\$837.00	7/20/2021	⋮

3. Hover the ellipsis and click **"Profile"**
4. Scroll to the bottom where it says **"Administrative Actions"**
5. Click **"Accept"** and then **"Yes"**



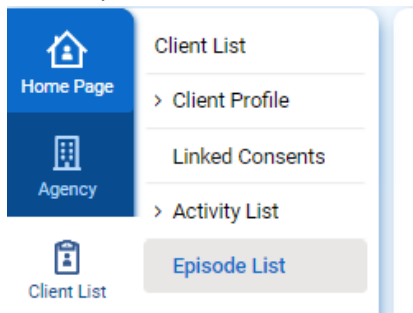
6. You can now submit encounters for the referred client as you normally would
  - a. See section **"Step 3: Submitting an Encounter"** on page 23



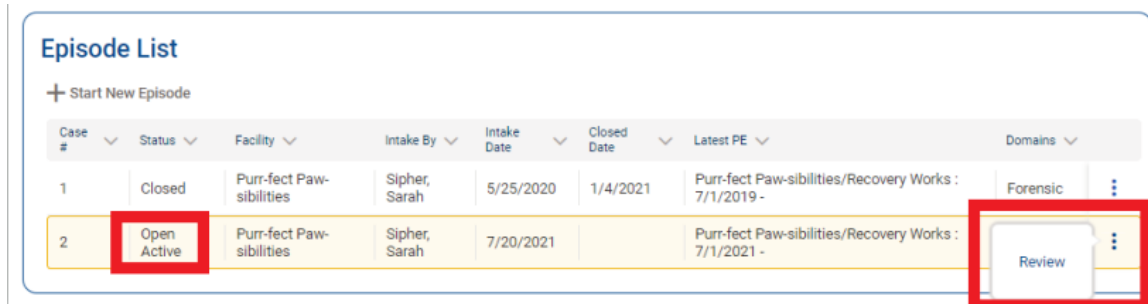
## Closing an Intake/Episode

An intake should be closed once all work has been completed for the client.

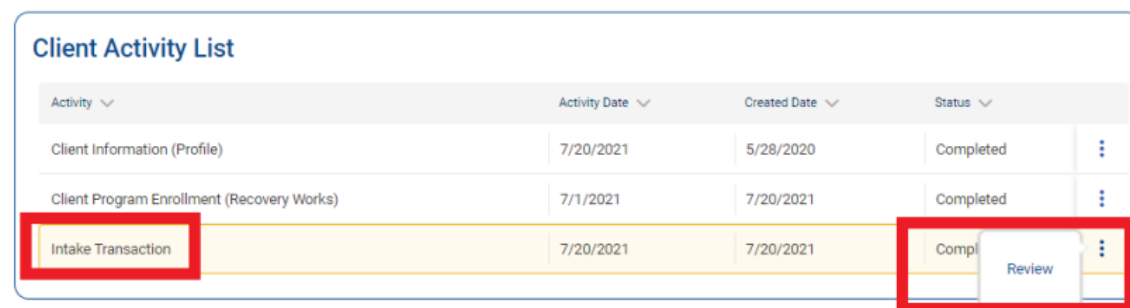
1. Go to Client List > Search > Select the client you need to close out by opening the Activity List
2. Select Episode List from the left menu



3. Select the episode from the Episode List by hovering the ellipsis and clicking "Review"



4. Select "Intake Transaction" from the Client Activity List by hovering the ellipsis and clicking "Review"



5. Scroll down to where it says "Date Closed"
6. Select a date of discharge from the calendar
7. Click "Save & Close the Case"



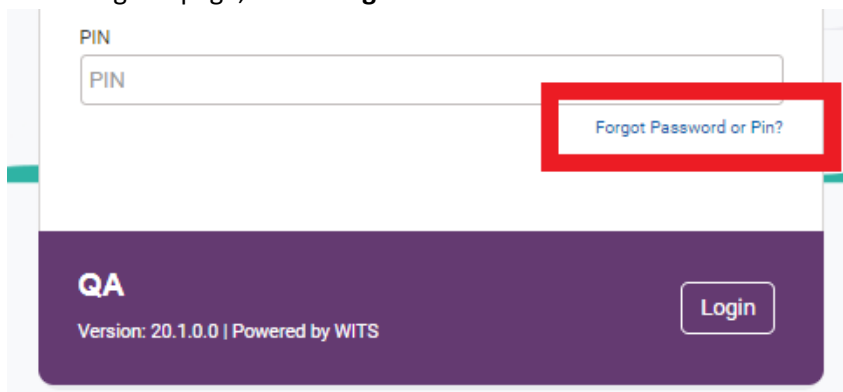
## SECTION THREE: WITS ADMINISTRATIVE FUNCTIONS

### Changing Credentials (Password & Pin)

\*Note: Passwords must be 6 characters in length and must include at least 1 number

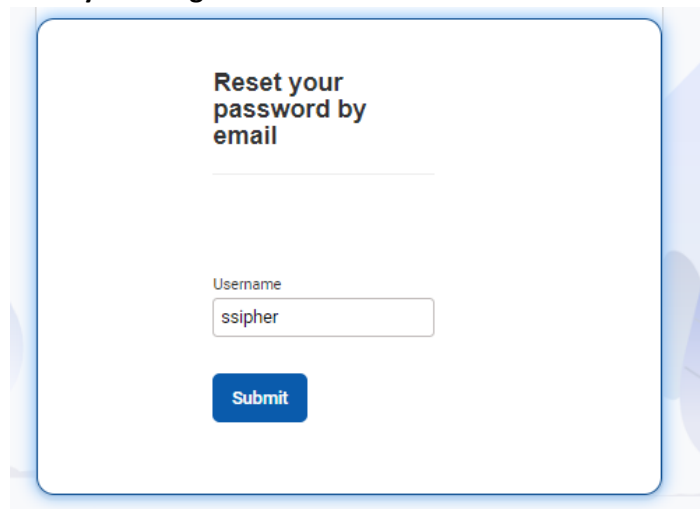
To change your password and pin, complete one of the following:

- Submit a help desk ticket to <https://dmha.fssa.in.gov/helpdesk/?div=dmha> asking for a password reset on your account
  - Follow the link in the email to create a new password and pin
- On the sign-in page, click **“Forgot Password or Pin?”**



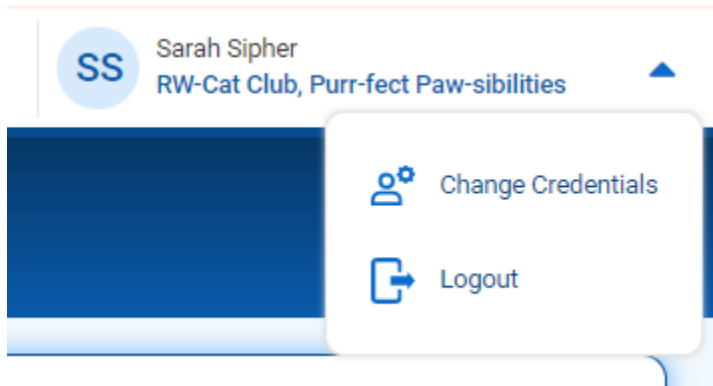
The screenshot shows the WITS sign-in interface. At the top, there is a 'PIN' label above a text input field. To the right of the input field is a link that says 'Forgot Password or Pin?'. Below this is a dark purple footer bar containing the text 'QA Version: 20.1.0.0 | Powered by WITS' on the left and a 'Login' button on the right.

- Enter your assigned **USERNAME** – not email



The screenshot shows a modal window titled 'Reset your password by email'. It contains a 'Username' label above a text input field that has 'ssipher' entered. Below the input field is a blue 'Submit' button.

- Answer your security question
- You'll receive a password reset email. Follow the link to create a new password/pin
- If already logged into WITS, click the down arrow on your user info on the header



- Click “Change Credentials”
- Answer the security question and enter your old password/pin
- Create a new password and pin

## Reviewing All Vouchers at Agency

1. Go to **Agency > Billing > Authorization List**
2. Enter any search criteria you may want OR just hit "Search" to get all vouchers
  - a. I would recommend **changing "Status" to Active**, so you only get open vouchers
3. Hit **"Search"**

**Voucher Search**

Provider Agency <input type="text"/>	Provider Facility <input type="text"/>
Administrative Agency <input type="text"/>	Contracting Agency <input type="text"/>
First Name <input type="text"/>	Last Name <input type="text"/>
Unique Client Number <input type="text"/>	
Voucher# <input type="text"/>	Authorization Effective Date <input type="text"/>
	Authorization End Date <input type="text"/>
Status Active	Payor Plan Recovery Works
Created Date <input type="text"/>	Created By <input type="text"/>

4. A **Voucher List** will be returned that matches your search criteria
  - a. Sort by Effective Date, End Date, Client, or any field you would like
5. Can export to Excel

**Voucher List**

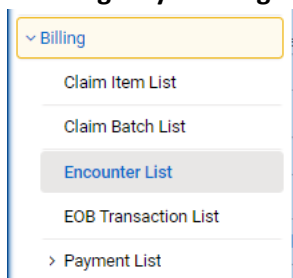
#	Payor	Provider Agency	Admin Agency	Intake Facility	Client	Effective Date	End Date	Status	Vouched Amt	Encumbered	Expend
780	Recovery Works [Recovery Works, 000005555]	RW - They got out	RW - They got out		Picatso, Pablo	7/12/2021	7/30/2021	Active	\$611.88	\$95.06	...
772	Recovery Works [Recovery Works, 000005555]	RW - They got out	RW - They got out		Biscuit, Sea	12/14/2020	12/31/2020	Active	\$837.00	\$0.00	...
767	Recovery Works [Recovery Works, 000005555]	RW - They got out	RW - They got out		Sipher, Sarah	11/1/2020	11/30/2020	Active	\$226.68	\$0.00	...

## Review of Encounters at Agency

It is important for your agency staff with release to billing roles to review encounters daily to ensure accuracy and that they've been released. If encounters are not released to billing, they will not be paid by Recovery Works.

To determine if encounters have been released:

1. Go to **Agency > Billing > Encounter List** on the left menu bar to get to the Encounter List screen



2. Enter any search criteria if you are looking for a specific encounter
3. Otherwise, hit **"Search"** to view all encounters
  - a. \*Note: the limit is 1,000 encounters for viewing
4. Three types of Statuses:
  - a. Not Released = the encounter was entered but has not been released to billing
  - b. Rejected = the encounter was released to billing, but it was later rejected from payment due to entry error
  - c. Released = the encounter has been released and processed to be paid out

### Encounter List (Export)

Enc ID	Client Name	Client DOB	Svc Start	Status	Duration	Procedure	Rend. Staff	Program Name	Balance	
171	Hobbs, Brent	5/15/1953	2/13/2016	Not Released	60 Min	F1020	Rwtraining, 11	Recovery Works	\$0.00	⋮
181	Teller, Jackson	4/9/1978	4/25/2016	Not Released	120 Min	F1010	Rwtraining, 02	Recovery Works	\$0.00	⋮
189	Booker, Sheyaxhnn	1/2/1992	2/1/2017	Not Released	60 Min	F1010	Rwtraining, 04	Recovery Works	\$0.00	⋮
226	Bobby, Bob	1/29/2000	5/28/2019	Not Released	60 Min	R1020	Sipher, Sarah	Recovery Works	\$0.00	⋮
156	Scofield, Michael	11/15/1968	11/24/2015	Not Released	60 Min	F1010	Canham, Patty	Recovery Works	\$0.00	⋮
229	Doe, Jane	1/1/1988	10/17/2019	Rejected (Detail)	30 Min	RW1030	Training, 01	Recovery Works	\$0.00	⋮
183	Boarman, Angela	7/14/1982	8/26/2016	Rejected (Detail)	60 Min	RW1010		Recovery Works	\$0.00	⋮
166	Bartlett, Steven	8/1/1982	2/4/2016	Released	60 Min	RW1010	Burnett, Shannon	Recovery Works	\$0.00	⋮
222	Joe, John	2/12/2000	2/12/2019	Released	30 Min	R1020	Training, 01	Recovery Works	\$19.50	⋮
253	Picatso, Pablo	10/25/1981	7/13/2021	Released	10 Min	R1020	Sipher, Sarah	Recovery Works	\$19.50	⋮

5. Review the encounters to ensure they are in the correct status
6. If necessary, use the ellipsis to review an encounter and release to billing

## Encounter Batching/Adjudication & Payments

The Recovery Works batching and adjudication process is automatic, which means the team does not manually review each encounter that is submitted to the system. Encounters are auto-approved unless the system finds it to be a duplicate or time overlap.

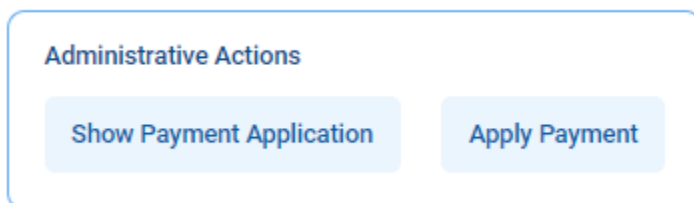
The system auto-adjudicates and creates a batch each week on Fridays at 11pm EST. Any encounters submitted during the previous week will be included on the batch. That batch date will appear in WITS as the **“Posted Date”** under the **Payment List**.

The following Wednesday at 4pm EST, the previous week’s batch is processed through the Clerk’s office, which begins the payment processing. Payments will be received via direct deposit approximately 35 days after the receipt of the batch file.

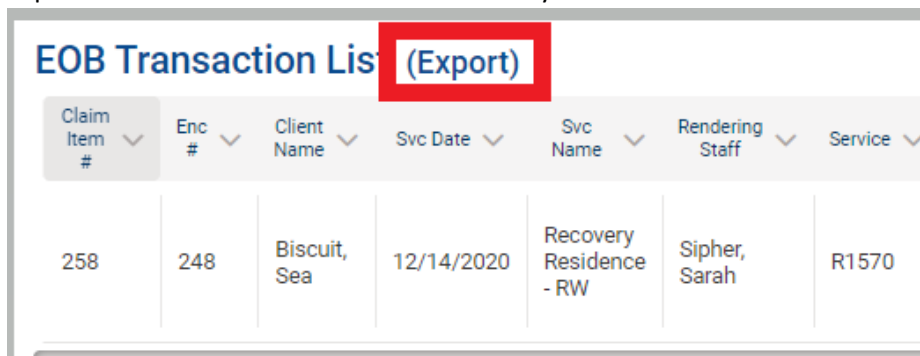
You can match a payment with your direct deposit by the dollar amount received in your account. That amount will match an amount on your payment list.

To review your payments:

1. Go to **Agency > Billing > Payment List**
2. Hit “Search”
3. Click the ellipsis of the payment you want to review and click “Profile”
4. Click “Show Payment Application” to review the encounters included in the payment



5. Export to Excel to sort and filter the data for your records



EOB Transaction List (Export)						
Claim Item #	Enc #	Client Name	Svc Date	Svc Name	Rendering Staff	Service
258	248	Biscuit, Sea	12/14/2020	Recovery Residence - RW	Sipher, Sarah	R1570

\*Note: for assistance matching payments or help locating missing payments, please submit a help desk ticket