

Entering Timely Access Data – Marin WITS- Contact Page

Step 1: In Marin WITS, go to the Contact Page

Step 2: Initial Contact Date Field = Enter the Date of First Contact/Initial Request or Referral [Individuals identified/screened as appropriate for assessment] – This should be the same Initial Contact date on the Contact Page and below:

Step 3: First Offered Screening = Enter the Date that the assessment was scheduled

Step 4: First Offered and Accepted Screening Fields = Enter the Date of the First Offered and Accepted assessment (Screening) dates. If the beneficiary is unable to attend the first offered time, in order to capture that the beneficiary is offered an appointment in a timely manner, complete the first (or second and third, as applicable) offered appointment field.

Contact Profile

Client Name: Client, Sample
Age: 29
DOB: 1/5/1989
Gender: Male

Status: In Progress
Created Date: []

Initial Contact Date: 9/26/2018 [calendar icon] Stop Date: 9/26/2018 [calendar icon]

Start Time: 4:48 PM Stop Time: [] Duration: []

Contact Reason: [] Contact Method: []

If Other, Specify: [] Source of Referral: []

Call Taker: Steffy, Leigh Requestor Name: []

Location: [] Requestor Phone #: []

Contact Made By: [] 1st Offered Intake/Screening Appt: [] [calendar icon]

LMHA: [] 1st Accepted Intake/Screening Appt: [] [calendar icon]

Benefit Type: []

Presenting Needs: []

Disposition: []

Unsigned Notes: [] Signed Notes: []

Sign Note

Entering Timely Access Data – Marin WITS

Step 1: In Marin WITS, go to the Intake Screen [under Activity List]

Step 2: Referral Date Field = Enter the Date of First Contact/Initial Request or Referral [Individuals identified/screened as appropriate for assessment] – This should be the same Initial Contact date on the Contact Page and below:

Step 3: Assessment Date Field = Enter the Date that the assessment was scheduled [should match the date from the Contact page].

Step 4: First Offered and Accepted Tx Appointment = Enter the Date of the First Offered and Accepted treatment dates. If the beneficiary is unable to attend the first offered time, in order to capture that the beneficiary is offered an appointment in a timely manner, complete the first (or second and third, as applicable) offered appointment field.

The screenshot displays the Marin WITS Intake Screen with the following fields and values:

- Group List:** Client List
- Client Profile:** Linked Consents, Contacts
- Activity List:** Intake, Lab/Radiology, Wait List, Tx Team, Screening, Drug Screening, Assessments, ASAM, Program Enroll, Admission, Diagnosis List, Encounters, Immunization
- Manner of Contact:** Routine Service
- Residence:** Marin
- Source of Referral:** 1-Individual, including self-referral
- Referral Contact:** Add Collateral Contact
- Referral Date:** 9/23/2020
- Assessment Date:** 10/2/2020
- 1st Offered Tx Appt:** 10/7/2020
- 1st Accepted Tx Appt:** 10/7/2020
- 2nd Available Tx Appt:**
- 3rd Available Tx Appt:**
- Initial Contact Date:** 9/23/2020
- Intake Date:** 10/2/2020
- Pregnant:** 0-No
- Due Date:**
- Prenatal Treatment:**
- Chronic Life Threatening Illness (CLTI):** No
- Injection Drug User:** No
- Presenting Problem (In Client's Own Words):**
- Risk Categories:** Cognitive Impaired, Foster youth, Homeless, Isolated Elderly
- Selected Risk Categories:** None