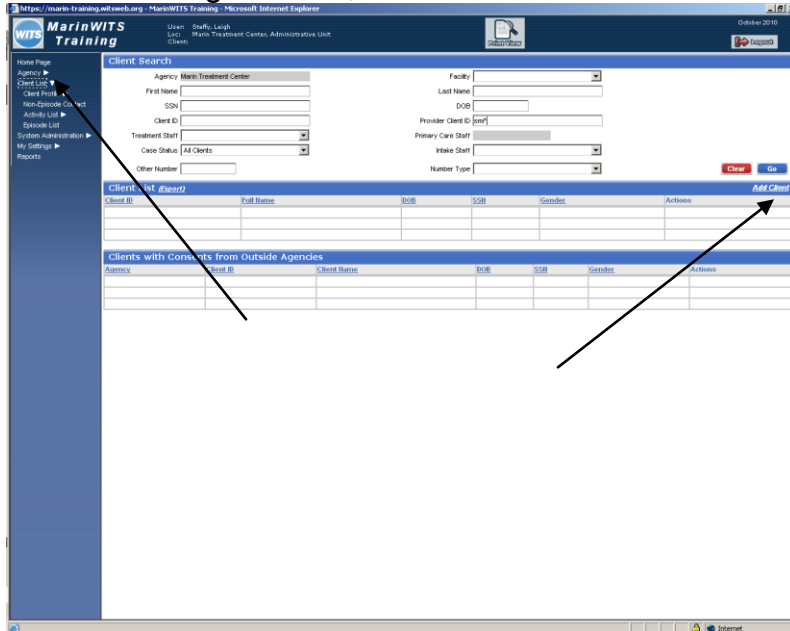
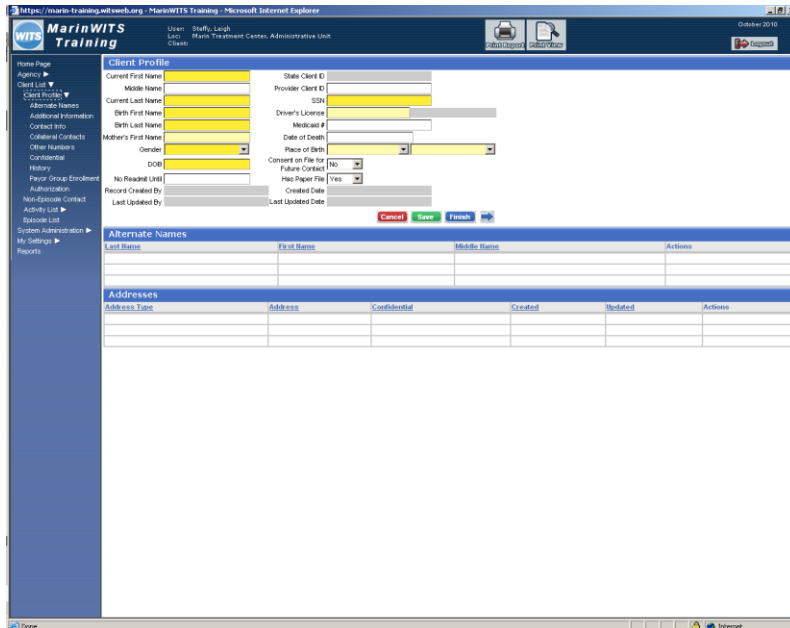


HOW TO ADD A CLIENT TO THE WAITLIST

In the left navigation bar, select 'Client List'. Click on the yellow Add Client link.

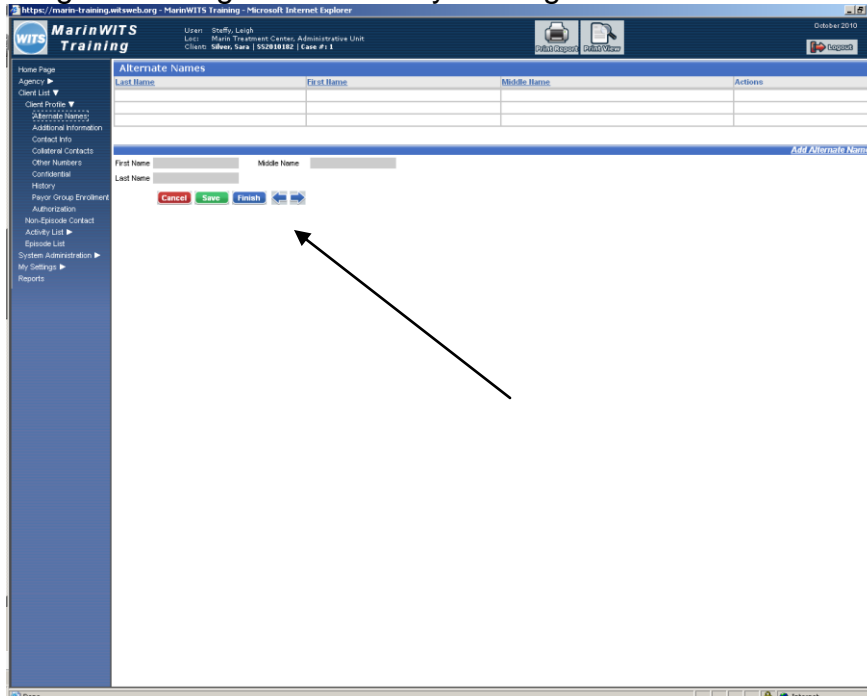


This will open the client profile section.

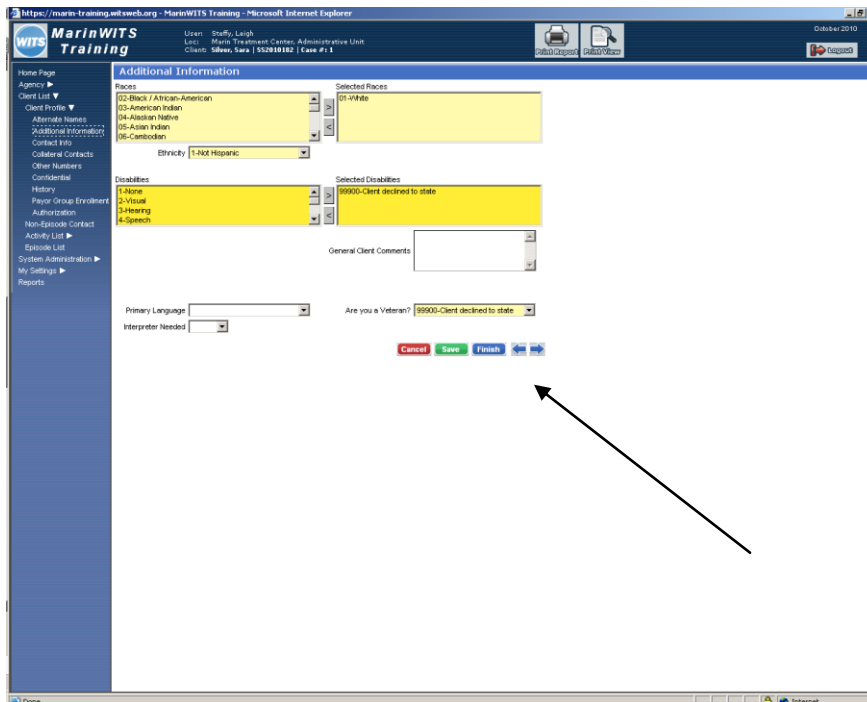


Refer to CalOMS Data Reference Guide for assistance filling out the fields. All yellow highlighted fields are required.

Progress through the Profile by clicking the blue Arrow Buttons on each page.



There are no required fields on this page.



This is the last page that has required information for non Drug-Medi-Cal clients. You can hit the Blue Finish button at the bottom of this page if you do not wish to add additional information.

Once a client has a profile you can complete the intake form. If you are already working on this client in the system, select Activity List from the left hand navigation bar. If you are not already working on the client, select the client from the Client List and click on the Activity List link.

The screenshot shows the MarinWITS Training web application interface. The top navigation bar includes the WITS logo, user information (User: Steffy, Leigh; Loc: Marin Treatment Center, Administrative Unit; Client:), and a date (October 2010). The left sidebar contains a navigation menu with options like Home Page, Agency, Client List, Client Profile, Non-Episode Contact, Activity List, Episode List, System Administration, My Settings, and Reports. The main content area is divided into two sections: 'Client Search' and 'Client List (4/2007)'. The 'Client Search' section contains various input fields for Agency, Facility, First Name, Last Name, SSN, DOB, Client ID, Provider Client ID, Treatment Staff, Primary Care Staff, Case Status, Intake Staff, and Other Number. Below this is the 'Client List' table, which has columns for Client ID, Full Name, DOB, SSN, Gender, and Actions. An arrow points to the 'Activity List' link in the Actions column for the client with ID JS1040155. Below the Client List is a section for 'Clients with Consents from Outside Agencies' with columns for Agency, Client ID, Client Name, DOB, SSN, Gender, and Actions.

Client ID	Full Name	DOB	SSN	Gender	Actions
JS1010181	John, Bob	1/1/1961	101-11-1010	Male	Profile Activity List
JS1040155	Jones, Casey	4/1/1955	444-00-5678	Male	Profile Activity List
JS2002954	Jones, Mary	3/8/1954	99900	Female	Profile Activity List
JMI101567	Jones, Micki	10/15/1967	99902	Male	Profile Activity List
JS1010174	Jones, Stephen	1/1/1974	000-00-0003	Male	Profile Activity List
JM2051188	Joyce, Marti	5/11/1988	444-44-1234	Female	Profile Activity List

If this is a new or previous client the Episode List will automatically open. Select the Start New Episode text from the right of the screen.

The screenshot shows the MarinWITS Training web application interface, specifically the 'Episode List for Jones, Casey' section. The top navigation bar is the same as in the previous screenshot. The left sidebar is also the same. The main content area shows a table with columns for Case #, Status, Facility, Intake By, Intake Date, Closed Date, and Actions. An arrow points to the 'Start New Episode' link in the Actions column for the first row of the table.

Case #	Status	Facility	Intake By	Intake Date	Closed Date	Actions
1	Closed	Administrative Unit	202, Training	4/1/2007	5/1/2009	Profile Start New Episode
2	Open Active	Administrative Unit	Steffy, Leigh	5/2/2009		Profile Review

Complete the yellow required fields.

Click finish when you have completed at least the yellow fields.

It is very important to correctly identify whether clients are pregnant, IV Drug Users or HIV + as the waitlist pulls the information from this page.

Now that the client has an intake, Select Waitlist from the left hand navigation bar

Click on the white hyperlink text "Put Client on Waiting List for Another Program."

Complete the following sections of the waitlist:

The screenshot shows a web browser window with the URL <https://marin-training.witsweb.org/p#stay>. The page title is "MarinWITS Training" and the user is logged in as "User: Steffy, Leigh" at "Location: Marin Treatment Center, Administrative Unit". The main content area is titled "Client Wait List" and contains the following fields:

- Agency: Marin Treatment Center
- Facility: Administrative Unit
- Select Program: [Dropdown menu]
- Select Staff: [Dropdown menu]
- Modality: [Dropdown menu]
- Wait Start Date: 7/6/2015
- Wait End Date: [Date field]
- Added to Wait List By: Steffy, Leigh
- Dually Diagnosed?: [Dropdown menu]
- Assistance Needed to Place This Client: [Dropdown menu]
- Client is Injecting: No
- Referred to Interim Services: [Dropdown menu]
- Client is Pregnant: 1-Yes
- HIV Positive: No
- Due Date: 1/8/2016
- Removed From Wait List By: [Text field]
- Reason: [Text field]
- Comments: [Text area]

At the bottom of the form, there is a link "Admit Client" and three buttons: "Cancel", "Save", and "Finish".

Select Program: This will give a list of programs offered by your agency.

Wait Start Date: This is the intake date or date of first request for services.

Please be sure to complete both the Dually Diagnosed and the Referred to Interim Services dropdowns. Please remember that all priority populations must be provided with interim services during their waitlist.

Click Finish when you have completed this section.

The client will now appear on the agency waitlist. Each client has a unique identifier and each type of priority population can easily be identified and will be displayed at the top of the Waitlist.

The screenshot shows the MarinWITS Training web application interface. The browser address bar displays <https://marin-training.witsweb.org/p#stay>. The page header includes the WITS logo, the text "MarinWITS Training", and a "Logout" button. Below the header, the user information is "User: Steffy, Leigh" and the location is "Marin Treatment Center, Administrative Unit". A "Client: Boop, Betty | BB2122354 | 2" dropdown menu is visible, along with a "Clear Client" button. The main content area is divided into a left sidebar and a main table.

The left sidebar contains a "Home Page" section and an "Agency" section with various sub-links including Agency Profile, Agency List, Aliases, Contacts, Reminder, MU Query, Governance, Relationships, Announcements, Referrals, Removed Consents, Wait List, Deleted Clients, Facility List, Staff List, Tx Team Groups, Non-Staff Physicians, System Usage, Drug Screening, Billing, Client Access History, MU Calculation, Court, Group List, Client List, System Administration, My Settings, Reports, and Support Ticket.

The main table is titled "Wait List" and contains the following data:

Actions	Full Name	Program	Staff	Prepnant	Due	Dual Diag.	HIV	IV Drugs	Interim Ser	Placement Asst	Start Date
	Waiting, Jane	Free Spirit Outpatient Services		Yes	1/8/2016		No	No	Yes	Yes	7/6/2015
	Waitlist, Ronald	Free Spirit Outpatient Services		No		No	Yes	No	Yes	No	7/6/2015
	Boop, Betty	Free Spirit Outpatient Services		No			No	No			6/30/2015