



# MAINE-WITS Statewide Waitlist User Guide

*Statewide Waitlist  
User Guide*

WITS

FEi Systems

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## Section 1. Set Up Who Can Add Clients to Your Program Waitlist



**Where: Agency – Facility - Program**

1. The Waitlist works by program. This means that you may place a client on the waitlist for a program, which is housed in a facility, in an agency. You may also place a client on the waitlist for all programs in the state with the same modality.
2. There are two roles that you grant to users which gives them access to the State Waitlist. The roles are either full access or read only, depending on the user.
3. Within each Program (per Agency, per Facility), you can indicate whether the program is available for the cross-agency waitlist (any person in any agency can place a client on the waitlist for that program), local only (only users within your agency can place clients on the waitlist for that program) or none (there is no waitlist tracking for the program at all). This will determine
4. Each program’s capacity is important in relationship to the waitlist, as this will determine the number of available beds. Also, if you indicate that the program is gender specific or age specific, it will limit the types of clients that can be placed on the waitlist (e.g., if a program is limited to females on the set up screen, no one may place a male client on the list).

**Program Setup**

Agency Name

Facility Name

Program Name

Display Name

Modality

Modality Specifier

Current Enrolled

Program Type

Level of care

County

Report to State

Report to TEDS

Age Group  Gender Specific

Waitlist Availability Type

Program Start Date

End Date

**Capacity List**
Add New Capacity

Actions	Capacity Type	Capacity	Start Date	End Date
	Slots	10	2/26/2015	



- You may set up information about your facility in the Facility – Special Services screen. This information will be displayed when a user wants more information on your facility from the Program Waitlist screen.

**Special Services**

Agency Name

Facility Name

Special Population Services

- Assistance for Illiterate Clients
- Food Services - Kosher, Vegetarian, Special Diets
- Interpreter Services
- Manage Actively Psychotic Clients

Special Populations Served

General Information
[Add New Information Item](#)

	<a href="#">Service Information</a>	<a href="#">Details</a>
	Does the Facility Help Clients Obtain Medicaid Card?	A counselor will help you apply for MaineCare and talk to you about all your benefits.
	Does the Facility Provide Culturally Specific Services?	This facility has staff who speak British English and love old romance novels

Cancel
Save
Finish

- A WITS Administrator, has the ability to control the priority score of clients on the waitlist. You can assign a weight score to each category (pregnant, IV drug user, etc.) so that the total score for the client is calculated and visible to agencies when they determine whether to accept the client. You may also add additional values that may be weighted.

17.19.1

# Maine-WITS Training

User: O'Brien, Kate | Location: Administrative Agency, Administrative Unit

- Home Page
- ▶ State Waitlist
- ▶ Agency
- ▶ Group List
- Clinical Dashboard
- ▶ Client List
- ▼ System Administration
  - Code Tables

Select a code table to edit

Go

- Home Page
- State Waitlist
- Agency
- Group List
- Clinical Dashboard
- Client List
- System Administration
  - Code Tables
  - IP Waitlist Administration
  - Activity Management
  - Adjudication Rule
  - Services
  - System Info
  - NOMS Extraction
  - Agency Oversight Assignment
  - Alert Types
  - Master Patient Index
  - CDP Legacy Extract
- My Settings
- Reports
- Support Ticket

Wait Priority List (Export)											
Actions	Id	Description	State Code	Waitlist Score	Sort Order	Effective Date	Expiration Date	Created Date	Created By	Updated Date	Updated By
	-103	Pregnant	PG	5	40	12/12/2014		12/12/2014	1	12/12/2014	1
	-102	IV Drug User	IVD	2	30	12/12/2014		12/12/2014	1	12/12/2014	1
	-101	HIV Indicated	HIV	1	20	12/12/2014	12/12/2014	12/12/2014	1	12/12/2014	1
	-100	None		0	10	12/12/2014	12/12/2014	12/12/2014	1	12/12/2014	1
	3	Active Duty Military		1		12/12/2014		12/12/2014	1	03/19/2015	17
	4	State Probation/Parole		1		12/12/2014		12/12/2014	1	03/19/2015	17
	5	Returning Veteran		1		12/12/2014		12/12/2014	1	03/19/2015	17
	6	All Other		0		12/12/2014		12/12/2014	1	12/12/2014	1

New

Adding a new item

Id

Description

State Code

Weight Score

Sort Order

Effective Date

Expiration Date

Created Date

Created By

Updated Date

Updated By

Cancel Save Finish

## Section 2. Using the Waitlist



Where: State Waitlist

1. State Waitlist will be visible on the WITS menu to those users with one of the Cross-Agency Waitlist roles. Users may search the entire waitlist, or narrow the search based on Modality, Age Group, Agency, Geographic Area (if used), etc. Once they find a waitlist that they wish to place the client on, they will click “Review List”. If they would like to see more information about the facility, they may click on “Facility Details”.

17.19.1

WITS Maine-WITS Training

User: Conrad, Jennifer | Location: Training Agency A, Training Facility A

Home Page

State Waitlist Search

Modality: [Dropdown] Program Name: [Text]

Facility GeoCode: [Dropdown] Beds/Slots Available: [Text]

Agency Name: [Dropdown] Facility Name: [Text]

Age Group: [Dropdown] Gender Specific: [Dropdown]

Clear Go

State Waitlist List

Actions	Agency/Facility	Facility City	Program	Modality	Available Program Slots	# on Waitlist	Age/Gender
[Icon]	Maine Training Agency/Facility 1		Intensive Outpatient Treatment	Ambulatory-Intensive-Outpatient	100	4	None/None
[Icon]	Review List   Facility Details		Residential	Rehabilitation/Residential-Short Term (30 days or fewer)	16	2	None/None
[Icon]	Maine Training Agency/Facility 1		The Best Detox	Detoxification, 24 Hour Service, Free-Standing Residential	8	1	None/None
[Icon]	Med Mgmt test Agency/Richmond		Psychotropic Med Mgmt	Ambulatory- Non-Intensive Outpatient	50	0	None/None

2. The agency user may view non-identifiable information about clients on each specific program waitlist. This can help to determine if the client should be placed on the waitlist. For instance, if there are three pregnant females waiting for a program, who have been waiting for several days for 2 available beds, you might not want to put a male client on this program’s waitlist.

17.19.1

WITS Maine-WITS Training

User: O'Brien, Kate | Location: Administrative Agency, Administrative Unit

Home Page

Client Waitlist

Agency: Maine Training Agency Facility: Facility 1

Program Name: Intensive Outpatient Treatment Modality: Ambulatory-Intensive-Outpatient

Available Slots: 100 Age/Gender: None/None

Status: Pending

Clear Go Finish

Client Waitlist List

Actions	Waitlist ID	Placed by Agency	Gender	Age	Des Date	In/Out of Use	Days Waiting	Priority	Status
[Icon]	624	Training Agency A	Male	63		In Last 6 Months	62	0	Pending
[Icon]	632	Training Agency A	Male	38		In Last 6 Months	53	0	Pending
[Icon]	1428	Training Agency A	Male	38		Never	29	0	Pending
[Icon]	1627	Training Agency A	Male	0		Never	19	0	Pending

- If the Program is within your agency, you can Accept or Reject the client from this screen. You may also place a client that is in your agency on the waitlist by clicking "Add Client to Waitlist." The client may have an intake, but does not need to have one. You must only enter enough information to "SAVE" the client profile.
- To add a client to a waitlist, the user searches for the client (by name), enters the priority criteria (pregnant, IV drug user, etc). Note that if the client is accepted, the pregnant information will populate the intake screen. A final field to be aware of is the "Add client to all waitlists for this modality?" If you select yes, the client will be placed on all waitlists for all programs of that modality (which accept outside clients). Once the client is accepted into a program and you refer them, the other waitlist records will be closed automatically.

### Adding a Client to the Waitlist

The screenshot displays the 'Maine-WITS Training' interface. The top navigation bar includes the WITS logo, the user's name 'User: O'Brien, Kate', and the location 'Administrative Agency, Administrative Unit'. A sidebar on the left contains navigation options: Home Page, State Waitlist, My Programs, My Clients, Agency, Group List, Clinical Dashboard, Client List, System Administration, and My Settings.

The main content area is divided into two sections:

- Client Waitlist:** This section shows a search form with fields for Agency (Maine Training Agency), Facility (Facility 1), Program Name (Intensive Outpatient Treatment), Available Slots (100), and Status (Pending). There are 'Clear', 'Go', and 'Finish' buttons. Below the search form is a table with the following data:
 

Actions	Waitlist ID	Placed by Agency	Gender	Age	Date Date	IV Drug User	Days Waiting	Priority	Status
	624	Training Agency A	Male	63		In Last 6 Months	62	0	Pending
- Client Waitlist Profile:** This section provides a detailed view of a client's profile. It includes fields for Agency (Maine Training Agency), Facility (Facility 1), Age/Gender (None/None), Program Name (Intensive Outpatient Treatment), Modality (Ambulatory-Intensive-Outpatient), Available Slots (100), and Waitlist Status (Pending). The 'Client Name' field is highlighted in yellow and contains the text 'Type here to search...'. Other fields include Unique Client Number, Last 4 of SSN, Gender, Expected Payment Source, Pregnant status, Due Date, and IV Drug User status. There are sections for 'Other Priority Options' (Active Duty Military, All Other, Returning Veteran, State Probation/Parole) and 'Selected Priority Options'. At the bottom, there are fields for BG Priority, a checkbox for 'Add client to all waitlists for this modality?' (set to 'No'), Rejection Reason, Signed Notes, and Unsigned Notes. 'Sign Note', 'Cancel', 'Save', and 'Finish' buttons are located at the bottom right.



## Section 3. Accepting Clients



Where: State Waitlist

There are two important sub-screens: My Programs and My Clients.

1. “My Programs” – allows the user to manage and view waitlists for programs within their agency. From this screen, you may view the number of clients waiting for a specific program. Clicking “Review” allows you to view all client waitlist records for that program.
  - a. You may contact the referring agency and refer to the client using the “Waitlist ID.”
  - b. You may ask that agency to send you consented information.
  - c. You may accept the client off the waitlist. This will not admit the client, but will send an email to the originating agency to inform them that they will need to create a Consent and Referral to your agency.
  - d. You may reject the client. Please note that if you reject a client, they cannot be referred to your program again.

The screenshot shows the 'Maine-WITS Training' web application. The top navigation bar includes the WITS logo, the title 'Maine-WITS Training', and a 'Logout' button. Below the navigation bar, the user's name 'User: O'Brien, Kate' and location 'Location: Administrative Agency, Administrative Unit' are displayed. A left sidebar contains a menu with options: Home Page, State Waitlist, My Programs, My Clients, Agency, Group List, Clinical Dashboard, Client List, System Administration, My Settings, and Reports. The main content area is divided into two sections. The top section is 'Program Waitlist Search', which includes a search form with fields for Facility, Program Name, Gender, Status (set to Pending), Available Slots, Age, and Modality. There are 'Clear', 'Go', and 'Finish' buttons to the right of the search form. The bottom section is 'Program Waitlist List', which displays a table with the following columns: Actions, Waitlist ID, Program, Placed by Agency, Gender, Age, Due Date, IV\_Drug\_User, Days Waiting, # prior times in program, Block Grant Priority, and Status. The table currently contains no data rows.

2. “My Programs” – allows you to manage and view clients you placed on any statewide program waitlist. From this screen, you may:
  - a. Click “Review” to update the client’s waitlist record (i.e., if a woman becomes pregnant while waiting, you will want to note that as it changes her priority on the waitlist and provides valuable reporting information for block grant funding).
  - b. Click “Delete” to remove the client from the waitlist (i.e., the client no longer needs the program, moves, etc.) If you placed the client on more than one program waitlist for the modality, WITS will ask if you want to remove the client from all waitlists for this modality.
3. A highlighted row indicates that the client has been accepted.

**Client Waitlist Search**

Client FN <input type="text"/>	Client LN <input type="text"/>	Unique Client Number <input type="text"/>	
Agency <input type="text"/>	Modality <input type="text"/>		
Program Name <input type="text"/>	Status <input type="text"/>	Days Waiting <input type="text"/>	
Age <input type="text"/>	Gender <input type="text"/>	Pregnant <input type="text"/>	
HIV <input type="text"/>	IV Drug Use <input type="text"/>	Waitlist ID <input type="text"/>	

**Client Waitlist List**

Actions	Waitlist ID	Client Name	Agency/Facility	Program Name	Days Waiting	Priority	IV Drug User	Due Date	Age	Gender	Status
	629	789654, TDS	Substance Abuse and Mental Health Services/SAMHS Test	IOP TEST	54	0	In Last 6 Months		38	Male	Pending
			Training Agency B/Training Facility B	Intensive Outpatient Treatment	54	0	In Last 6 Months		38	Male	Pending
	631	789654, TDS	Training Agency A/Training Facility A	Intensive Outpatient #1	54	0	In Last 6 Months		38	Male	Pending
			Maine Training Agency/Facility 1	Intensive Outpatient	54	0	In Last 6		38	Male	Pending

4. To refer an accepted client to the program,
  - a. Locate the client in your client list.
  - b. If the client does not have an intake, create one. Otherwise, use an open intake.
  - c. Create a consent. WITS will ask if the consent is linked to a waitlist record. If you say yes, WITS will let you choose from a defined list of agencies.
  - d. Create a referral. WITS will automatically populate the agency, facility and program on your referral.
5. The accepting agency will accept the referral and process the client through the intake and admission process in their agency.
6. A waitlist record is deleted once the client has been referred to the agency. Any associated waitlist records for other programs of the same modality are also deleted.

WITS uses the program’s set number of beds or slots, and automatically subtracts the number of clients enrolled in the program to determine the number of available slots or beds.

WITS keeps track of the number of clients on the waitlist as they are added or deleted.