

WITs Data Checklist

New Clients

Client Profile:

- First and Third Page of Client Profile
- Payor Group Enrollment (Insurance)
- Date entered into 'General Client Comments' box on third page if client was unable to accept first offered appointment

Intake:

- Source of Referral
- Referral Date
- Assessment Date

ASAM:

- All Level of Care
- Recommended Level of Care
- Actual Level of Care
- Clinical Override (If Necessary)

Admission:

- Diagnosis

Program Enrollment:

- Enrolled

New & Existing Clients

Encounter:

- Group encounters must be entered through 'Group List'

To Change Levels of Care or to Discharge:

- Program Enrollment (close all enrollments)
- Discharge

If Changing Level of Care:

- Intake
- Program Enrollment
- Admission: Diagnosis