

# 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]

**Step 3: Assessment Date Field** = Enter the Date that the assessment was scheduled [should be the first available appointment]. If the beneficiary accepts the time, enter the date in this field, click Finish and you are done. 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, proceed to the Additional Information Screen [under Client Profile] – please see next page.

The screenshot displays the Marin WITS Training web application interface. The browser address bar shows the URL <https://marin-training.witsweb.org>. The application header includes the logo, version number (18.9.1), and user information (Steffy, Leigh). The main content area is titled "Intake Case Information" and contains several form fields:

- Intake Facility: Administrative Unit
- Intake Staff: Steffy, Leigh
- Initial Contact: Other
- Residence: Marin
- Source of Referral: 13-Access
- Case #: 1
- Case Status: Open Active
- Intake Date: 3/15/2017
- Pregnant: 0-No
- Due Date: [empty]
- Prenatal Treatment: [empty]
- Chronic Life Threatening Illness (CLTI): No
- Injection Drug User: No
- Presenting Problem (In Client's Own Words): [empty text area]
- Referral Date: 3/1/2017
- Assessment Date: 3/5/2017
- Date Closed: [empty]

At the bottom of the form are three buttons: Cancel, Save, and Finish. A left-hand navigation menu is visible, with "Activity List" expanded to show "Intake".

# Entering Timely Access Data – Marin WITS (continued)

**Step 4 [If applicable]: First Offered Appointment [General Client Comments Field ]=** Click on Client Profile and then Additional Information (see blue sidebar). In the **General Client Comments Field** , please enter only the date (XX/XX/XXXX) of the appointment that was offered to the client. Please do not include any narrative. Click Finish and you are done with the timely access data entry.

The screenshot displays the Marin WITS Training web application interface. The browser address bar shows the URL <https://marin-training.witsweb.org/>. The page title is "MarinWITS Training" with the subtitle "Administrative Agency, Administrative Unit". The user is logged in as "Steffy, Leigh" and can click "Logout". The sidebar on the left contains the following navigation items: Home Page, Agency, Court, Group List, Client List, Client Profile (expanded), Alternate Names, Additional Information (highlighted), Contact Info, Collateral Contacts, Other Numbers, Confidential, History, Payor Group Enrollment, Authorization, Allergies, Client External History, Linked Consents, Non-Episode Contact, Activity List, Episode List, System Administration, Reports, and Support Ticket. The main content area is titled "Additional Information" and contains the following fields:

- Ethnicity: 1-Not Hispanic
- Races: 01-White, 03-American Indian, 04-Alaskan Native, 05-Asian Indian, 06-Cambodian
- Selected Races: 02-Black / African-American
- Disabilities: 1-None, 2-Visual, 3-Hearing, 4-Speech
- Selected Disabilities: 7-Developmentally Disabled
- General Client Comments: 3/12/2017
- Sexual Orientation: [Dropdown]
- Religious Preference: [Dropdown]
- Preferred Language: [Dropdown]
- Interpreter Needed: [Dropdown]
- Are you a Veteran?: 0-No

At the bottom of the form, there are four buttons: "Cancel" (red), "Save" (green), "Finish" (blue), and two navigation arrows (blue).