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.
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.