

WUG Meeting Minutes, September 24, 2009

Introductions:

FEI:	Jennifer Conrad
	Lee Keitz
	Marion Sarhy
San Diego:	Alice McLennan (4 in attendance)
Salt Lake County	Cory Westergard
Sonoma:	David Sheaves
Hawaii:	Steve Okano
Maryland:	Joe Hong
Iowa:	Lonnie Cleland
New Hampshire:	John Sweeney

Please note: Action items (some for FEI, some for the WUG) appear in *bold italics*.

New Business:

1. FEI was awarded a contract with SAMHSA which will involve the eventual re-write of WITS, combining the best of other Electronic Behavioral Health Record Systems, into a new platform. This will be an ongoing project where we will use the gathered expertise of our customers, and may ask for input as we move forward. This is exciting as it will allow us to re-platform using newer and more robust technology.
2. Security Roles and Reports: A concern was voiced by San Diego regarding the fact that all users have access to the reports. This was investigated by FEI and found to be an issue. We are recommending the following actions regarding this fix:
 - a. Report security could be made at the report menu node level, on report groupings, or on individual reports. It appears that the group favored report security at the report grouping level.
 - b. A suggested level of security for each grouping is proposed as follows:
 - i. NOTES: WITS Administrator (across agencies), Agency Administrator, State Reporting, Agency Reporting should have access to all reports (within an agency).
 - ii. Access Reports: Allow Clinical Supervisor
 - iii. QA/QC Reports: Allow Clinical Supervisor
 - iv. Security: No additional roles
 - v. Miscellaneous: No additional roles
 - vi. Billing: Allow WITS Billing Administrator, Agency Billing Administrator; Billing Supervisor; Contract Manager
 - vii. Drug Testing: Allow DTMS Lab Supervisor

- viii. ATR Admin: this role will have reports specific to the ATR process, along with some general reports that are filtered to only show ATR client information (Phase 1 of this process is captured in WI #4801).
 - c. *The WUG is being asked to review and comment on the above. It will be posted to the forum.* Once a consensus is reached, FEI will remedy the issue.
 - d. The group asked for longer than the usual 5 day review period to study this issue.
 - e. PLEASE NOTE: There are customer-by-customer exceptions to the standard report permissions, and FEI will take these into account.
- 3. History of Access/Changes: Cory asked about expanding the Client Profile: History screen to include more domain information on access/changes.
 - a. We discussed that this was designed to show basic access/update information; that FEI tracks audit information in more cryptic format. This audit information is available through the Help Desk if needed.
 - b. Adding more information to the History screen could be done by any customer that wanted it. In addition, the group asked if there might be some utility built to access the audit files directly. *FEI will get a quote for these two options so that the group can discuss their options further.* FEI Customers should be aware of two things:
 - i. Adding information to the History screen might impact performance of the system.
 - ii. Since the additional information is not stored in a user-friendly format, programming would be involved to convert data to a readable format. FEI stores the data cryptically to save space.
 - iii. Steve noted that in other systems, he has had to use an entire server to store audit files.
- 4. Group Notes Enhancements (proposed by TN):
 - a. Marion presented suggested enhancements on Group Notes. TN will be using Group Notes for a new Prevention Module, which will be demonstrated once the requirements and coding are complete.
 - b. However, there were several ideas of which all WITS users might like to take advantage, including:
 - i. Adding an inactive status and reason for clients on the roster.
 - ii. Adding a link to go directly from the Group Profile List screen to the Group Roster for that Group.
 - iii. Moving the Create Group Session and Print Sign In Sheet to an Administrative Actions box (to improve consistency throughout WITS).
 - c. These items were well received by users on the call. This item will be posted on the forum shortly.
- 5. Ability to send announcements to “Agency Types” (ID)
 - a. Idaho would like to add the ability for the WITS Administrator to send announcements to an Agency Type (such as Mental Health Treatment, Substance Abuse, ATR, etc.).

- b. Steve requested that the ATR Administrator have the same capability, and that if only one agency is chosen, the message could be directed to facilities. **Note:** This can be included with this enhancement is Idaho is amenable.
 - c. This item was well received by users on the call. *This item was posted on the forum on 9/23 for comment/approval.*
6. Client Group Enrollment – do not allow a user to enroll the client in an inactive Government Contract (HI)
 - a. The inactive contracts would not appear in the dropdown as a choice on a CGE
 - b. Note: this only applies to customers using Contract Management, and only affects the Client Group Enrollment screen functionality
 - c. This item was well received by users on the call. *This item was posted on the forum on 9/23 for comment/approval.*
7. Modify the formatting of zeros in printed reports so that these are displayed differently than the letter “O”. (Sonoma)
 - a. Once a cost estimate has been prepared for Sonoma and approved, this item will be posted on the forum for comment.
8. Alert Functionality was demonstrated:
 - a. This is an enhancement paid for by Indiana, Tennessee and Idaho.
 - b. Several states are interested in this enhancement, and asked if they could have it available.
 - c. Available alert types are attached as requested.
 - d. *The WUG users will need to determine a policy regarding high-priced enhancements of this nature (where the cost was shared by some states, but others did not participate). A suggestion was made at some point to have non-participating states wait a year for enhancements of this nature, but FEI will leave that up to the decision of the WITS User Group.*
9. A copy of the Roles and Descriptions in WITS was requested and is attached.
 - a. PLEASE NOTE: Roles and their various relationships have been modified by customer. The list provided will give basic information, but you should see your FEI Project Manager if you need more specifics for your WITS instance.

Old Business:

The WUG should note that the following items have been/are being completed as previously discussed:

- a. Bug #3272: Consented Activity List: Standardize Header for Admission, Discharge, Encounter and Misc Note. Included in the April 2009 release.
- b. Enhancement #3352: Diagnosis: filter diagnosis codes according to the axis they belong to. Included in the August 2009 release. Functionality demonstrated for attendees. Both Salt Lake County and Idaho have volunteered their Axis mapping if others would like to use it.
- c. Enhancement #4527: Scheduler: Enable a Search function and other enhancements. Scheduled for the October 2009 release.
- d. Enhancement #4002: Security: Combine Staff Account and System Access screens. Scheduled for the September 2009 release.